

Settings & Administration in ShelterPact

Detailed instructions with real ShelterPact screenshots

Interface reviewed October 12, 2026. Screenshots show fictional demo records. Available features and actions depend on organization modules, permissions, and record state.

Review organization identity, staff access, housing and workflow rules, documents, imports, integrations, public services, and retention.

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Review Organization Setup, Profile, and Subscription

Settings is the organization administration index. Setup & Configuration, Organization, and Billing & Subscription serve different purposes and can require management permission.

Before you begin: Open Administration / Settings. Confirm the agency and role shown in the staff menu before reviewing organization-wide controls.

Step-by-step instructions

1. Open Setup & Configuration to review guided setup and progress with an authorized organization manager. The shared demo account cannot open its management workflow.
2. Open Organization for agency name/type, abbreviation, contact information, physical and mailing addresses, jurisdiction, and timezone.
3. Review Shelter / Public Hours and Animal Control / Field Hours separately so public access and field coverage are described correctly.
4. Review Long-stay and Extended-stay thresholds, optional Automatic Intake Hold, and mapping defaults. These settings affect operational queues and new events.
5. Review branding, tenant state, onboarding, plan, and storage information shown on the profile. Save Organization only when authorized changes are intended.
6. Open Billing & Subscription with management access to review plan, subscription status, billing period, and available billing management.
7. After approved configuration changes, review the affected public information and operational screens. A subscription or billing action should be completed by the authorized account holder.

Screenshots

Figure 1. Settings lists the organization's administration destinations.

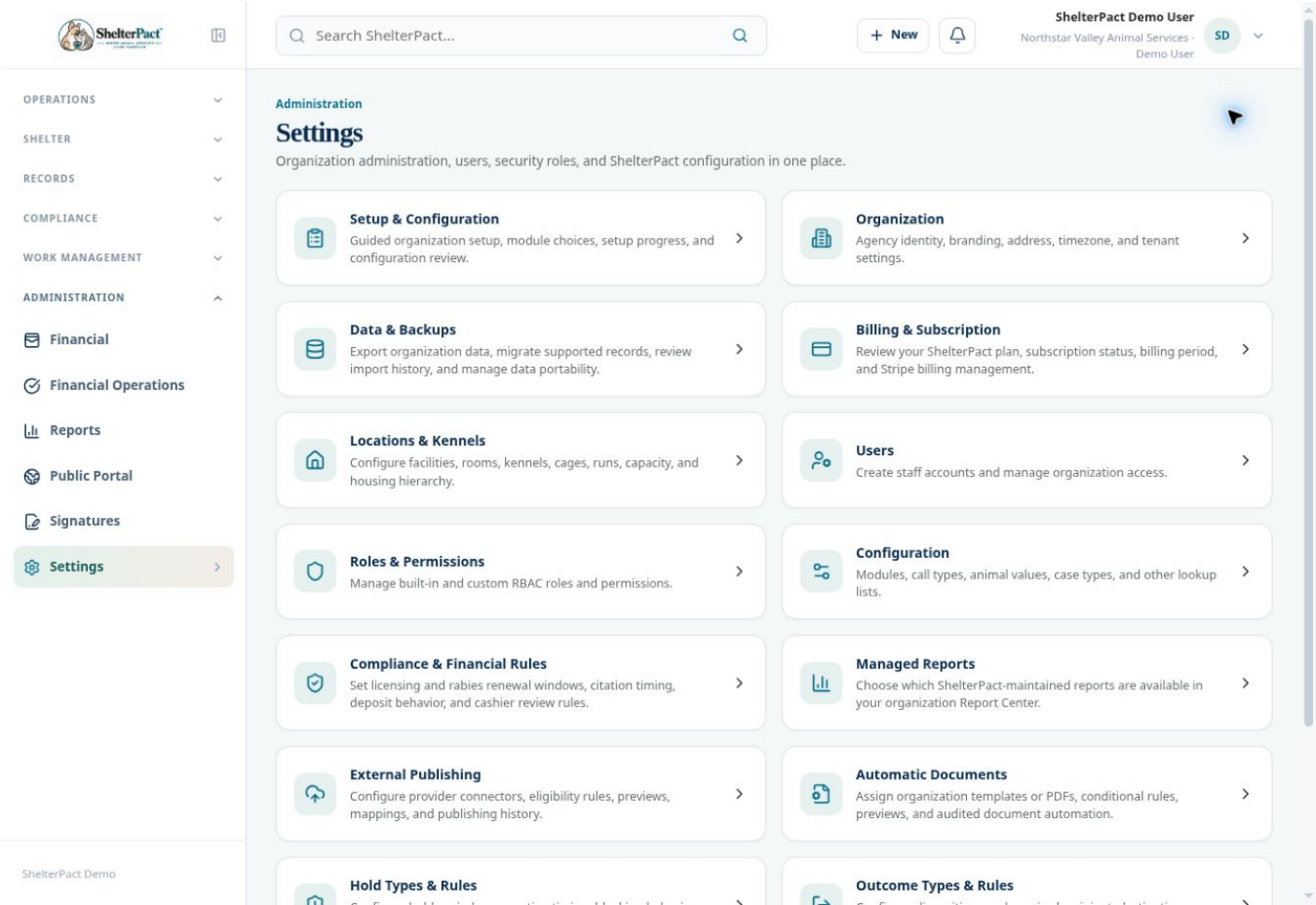


Figure 2. Organization profile includes identity, hours, shelter rules, mapping, branding, and storage information. (part 1 of 3)



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Administration

Organization

Tenant scoped

Your organization profile is the authoritative source for agency identity, contact information, service area, and operating hours.

Agency Profile

Public and operational organization details.

Agency name

Northstar Valley Animal Services

Organization type

Municipal Animal Services

Abbreviation

NVAS

Main phone

970-555-0199

Organization email

demo@example.com

Website

https://example.com

Emergency / after-hours phone

970-555-0198

Primary contact name

Demo Administrator

Primary contact email

demo.admin@example.com

Primary contact phone

970-555-0197

Timezone

America/Denver

Physical address

1500 Northstar Way

Shelter Length-of-Stay Thresholds

Define when animals appear in long-stay and extended-stay operational queues.

Long-stay threshold (days)

14

Default: 14 days.

Extended-stay threshold (days)

30

Must be greater than the long-stay threshold. Default: 30 days.

Current shelter rules

Long stay: 14+ days · Extended stay: 30+ days

Automatic Intake Hold

Optionally apply the same organization holding period to every new custody intake.

Automatically apply an intake hold

When enabled, every new intake receives a system-generated Stray Hold, regardless of species or intake type.

Changes affect only this organization.

Save Organization

ShelterPact Help Center | Detailed Guides

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Figure 2. Organization profile includes identity, hours, shelter rules, mapping, branding, and storage information. (part 2 of 3)

City

Fort Collins

State / Province

CO

ZIP / Postal code

80524

☒ Mailing address same as physical

Jurisdiction / service area

Northstar Valley service area — synthetic public demo

🕒 Hours & Services

Public shelter hours and Animal Control field coverage are maintained separately.

Shelter / Public Hours

Monday	☒ Closed
Tuesday	☒ Closed
Wednesday	☒ Closed
Thursday	☒ Closed
Friday	☒ Closed
Saturday	☒ Closed
Sunday	☒ Closed

Animal Control / Field Hours

Monday	☒ Closed
Tuesday	☒ Closed
Wednesday	☒ Closed

📍 Mapping Defaults

Set the organization map center used when no incident pins are visible.

📍 Use Agency Address

Default latitude

40.5853

Default longitude

-105.0844

Default zoom

12

These defaults affect Field Operations and record maps only when there are no mapped records to frame automatically.

☒ Enable optional live officer/unit location sharing

When enabled, permissioned field staff can choose to share their device location from Field Operations. ShelterPact never starts location sharing automatically.

Branding & Platform

📄

ShelterPact branding fallback

📤 Upload Logo

Tenant slug

Shelterpact-Demo

Figure 2. Organization profile includes identity, hours, shelter rules, mapping, branding, and storage information. (part 3 of 3)

Thursday ☒ Closed || Friday | ☒ Closed |
| Saturday | ☒ Closed |
| Sunday | ☒ Closed |

Incident history

ShelterPact Demo

Plan

Development

Onboarding

Complete

Status

Active

Storage

15.2 KB / 10.0 GB

Practical checks

Setup and billing management are permission-restricted in the shared demo. This article identifies their destinations without implying those management actions were performed in the demo.

Troubleshooting

What you see	What to check
Permission required: organization.manage	Use an authorized organization manager; do not broaden your role simply to bypass the restriction.
Map defaults or public hours are incorrect	Review the Organization profile and verify the relevant geographic or hours fields.

Review Users, Roles, and Effective Permissions

Users and Roles & Permissions show who can perform actions and which permissions a role enables. View access and management access are separate.

Before you begin: Open Settings / Users or Roles & Permissions. Confirm the intended staff identity before reviewing or changing access.

Step-by-step instructions

1. In Users, select the staff member and review their assigned role and Effective permissions.
2. Review the staff member's operational duties. For an animal control officer, review Officer / Unit Number, which connects to Field Operations.
3. In Roles & Permissions, select the role and review its name, description, active state, assigned users, and enabled categories.
4. Review specific action access rather than assuming a role title grants everything. View, create, edit, close, export, sign, and management permissions differ.
5. An authorized user manager can save an approved role assignment using Save Role Assignment. An authorized role manager can save approved role configuration using Save Role.
6. Review the resulting assignment and effective permissions before the staff member begins the affected work.
7. Preserve administrative recovery access. Built-in roles are protected from rename/delete, and Administrator remains the recovery role with all permissions in the inspected interface.

Screenshots

Figure 1. Users displays role assignment and effective permissions.



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Demo User

SD

Administration

Users

Create organization accounts, ShelterPact roles, and officer/unit numbers.

Organization Users

6 users in this organization.

AJ

ACO Jordan Smith

jordan.demo@shelterpact.example

Animal Control Officer

AM

ACO Morgan Davis

morgan.demo@shelterpact.example

Animal Control Officer

AT

ACO Taylor Jones

taylor.demo@shelterpact.example

Animal Control Officer

DS

Demo Supervisor

supervisor.demo@shelterpact.example

Supervisor

SA

ShelterPact Administrator

demo.admin@shelterpact.com

Administrator

SD

ShelterPact Demo User

demo@shelterpact.com

Demo User

Role Assignment

Manage access for ACO Jordan Smith

☐

Administrator

Full organization administration and operational access.

115

☒

Animal Control Officer

Field and enforcement access for animal control officers.

62

☐

Dispatcher

Call taking, dispatch, records lookup, and related operational access.

46

☐

Read Only

View-only access to operational records and reports.

29

☐

Shelter Staff

Animal care and records access for shelter staff.

50

☐

Supervisor

Operational supervisory access without tenant/user/role administration.

96

☐

Demo User

Restricted shared account for the public ShelterPact demo.

100

Officer / Unit Number

A-21

Required for Animal Control Officers and synchronized with Field Operations.

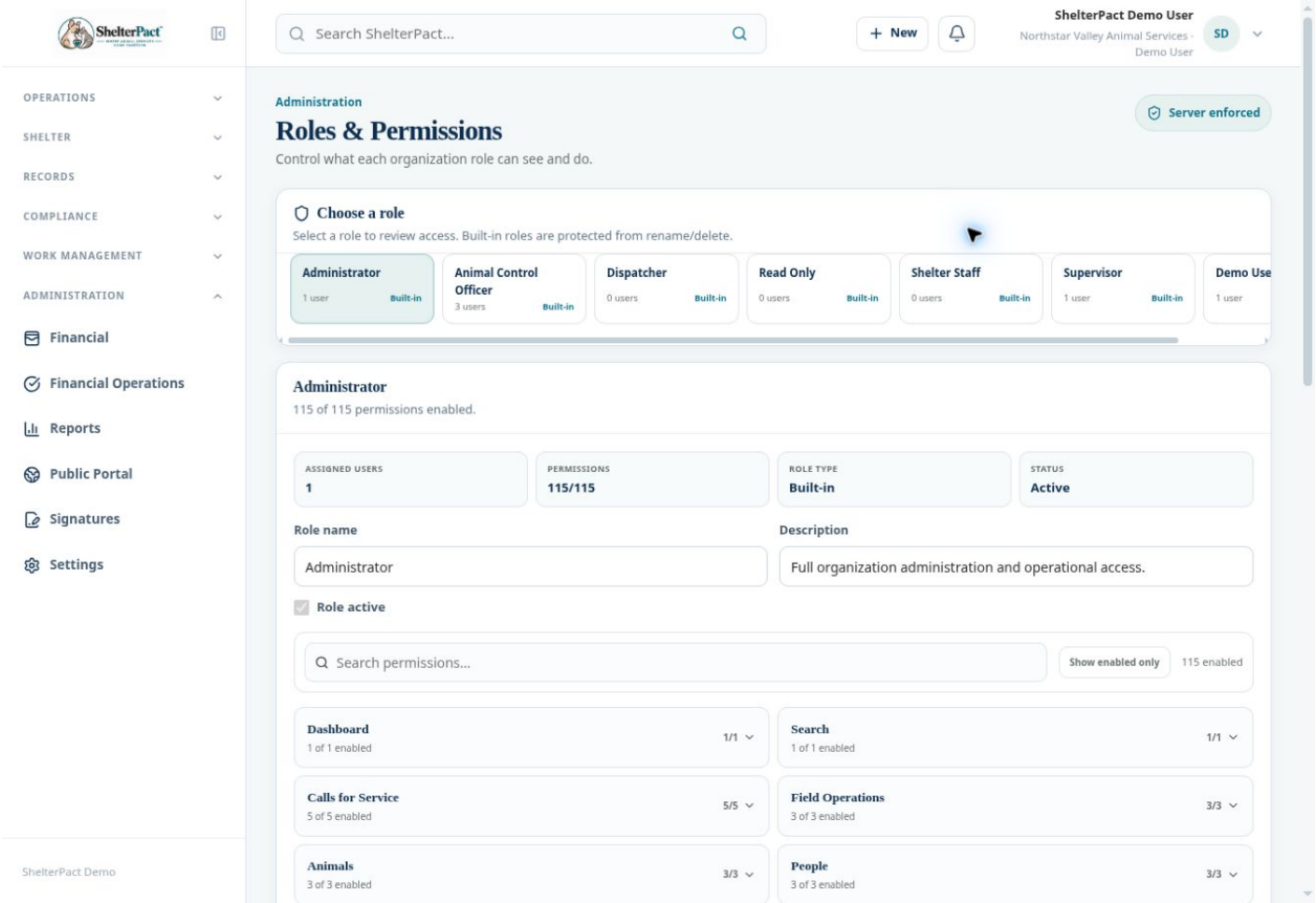
Effective permissions

ShelterPact Demo

ShelterPact Help Center | Detailed Guides

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Figure 2. Roles & Permissions organizes access by role and action category.



Practical checks

The shared demo can review user assignments but requires users.manage to change them. Account creation and security changes should be performed by the authorized administrator.

Troubleshooting

What you see	What to check
A staff member sees a page but cannot act	Review the action-specific permission, not only the view permission.
An officer is missing expected unit information	Review the officer/unit number and Field Operations configuration.

Configure Facilities, Housing Locations, and Capacity

Locations & Kennels defines the physical hierarchy used for housing moves. Parent locations organize the structure; housing locations can receive animals and enforce capacity.

Before you begin: Open Settings / Locations & Kennels or Locations from a shelter workspace. Have the real facility structure and approved capacity available.

Step-by-step instructions

1. Review Location Directory and existing paths before creating another location with the same purpose.
2. In Add Location, enter Name, Code, and Type. Choose the correct Parent location, or Top level for a root location.
3. Set Capacity to the approved number of animals the housing space is designed to hold. Review whether Housing location is enabled.
4. Set Active, Sort order, and Notes appropriately, then Create Location when authorized.
5. Review the directory path, housing flag, capacity, current occupancy, and child locations.
6. Use Edit for a legitimate correction. Review occupied housing before deactivating it; inactive locations remain in history but cannot be used for new placement.
7. Open Kennel Board or Current Population to confirm the configured housing appears as intended and that capacity checks reflect actual spaces.

Screenshots

Figure 1. Location configuration distinguishes hierarchy, housing assignment, and capacity.



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Demo User

Shelter

Locations

Build the physical housing hierarchy used for kennels, cages, rooms, receiving, isolation, and live animal movements.

Active locations
17

Housing spaces
13

Configured capacity
13

+ Add Location

Use parent locations to create a facility → area → room → kennel hierarchy.

Name *

Kennel A-01

Code

A-01

Type *

Kennel

Parent location

Top level

Capacity

1

Sort order

0

Housing location

☒ Animals can be physically assigned to this location.

Active

☒ Inactive locations remain in history but cannot be used for new placement.

Notes

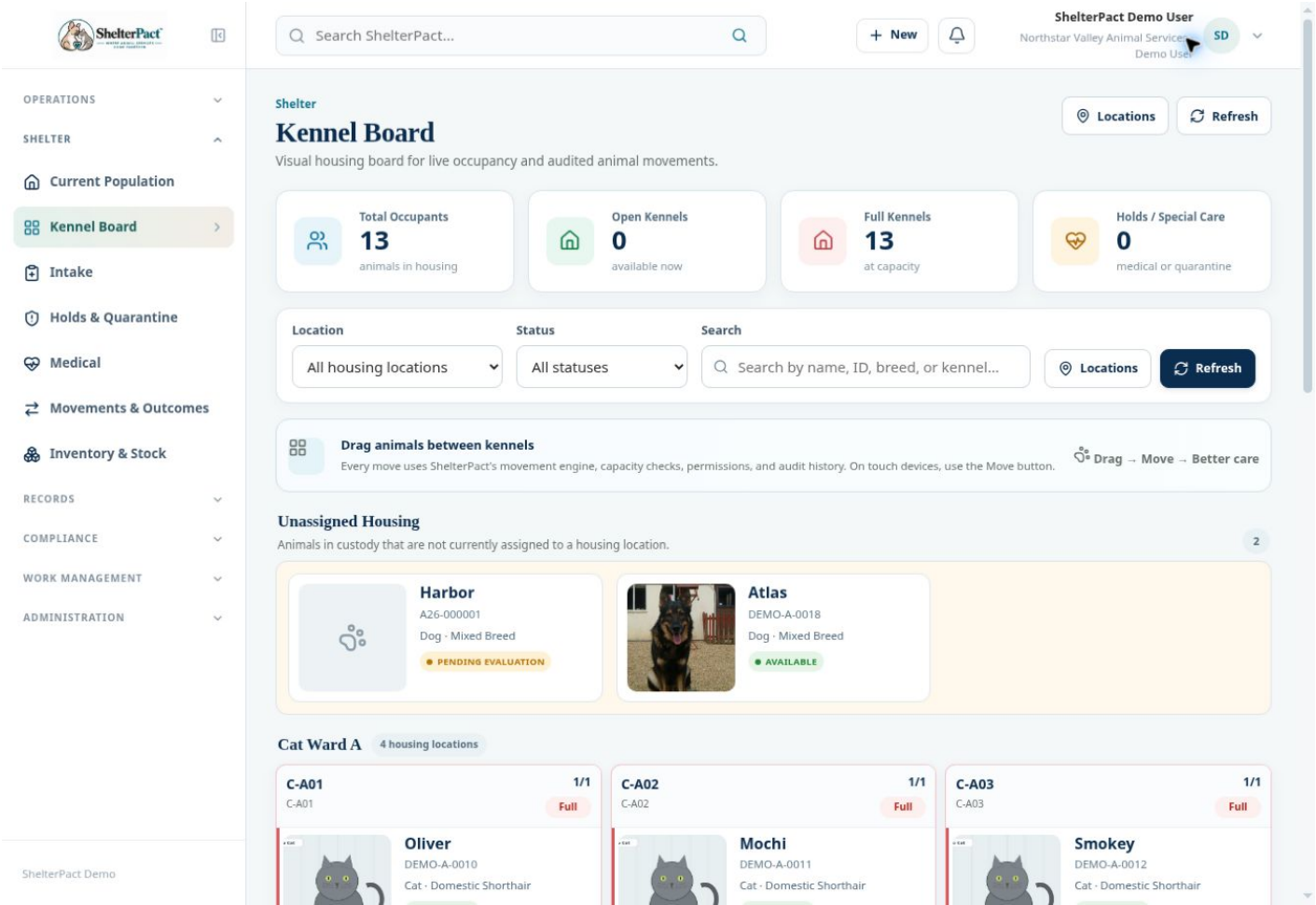
Optional operational notes...

Create Location

ShelterPact Help Center | Detailed Guides

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Figure 2. Kennel Board uses the configured location hierarchy.



Practical checks

A parent area and an assignable kennel are not necessarily the same kind of location. Review the Housing location setting.

Troubleshooting

What you see	What to check
A location cannot receive an animal	Check Active status, Housing location, capacity, and applicable restrictions.
A path is confusing	Review its parent hierarchy and naming; avoid duplicating the same physical space.

Maintain Lookup Lists and Enabled Modules

Configuration controls form choices and feature visibility. Removing an option deactivates it while historical records retain the original value.

Before you begin: Open Settings / Configuration with the relevant management permission. Review the effect on staff forms before making changes.

Step-by-step instructions

1. Open Lookup Lists and select the relevant category, such as species, breeds, colors, intake reasons, relationships, call types, priorities, medical entry types, or payment methods.
2. Review existing active values and Show removed options before adding another spelling of the same choice.
3. Use Add for an approved new value and its displayed ordering controls where applicable. Verify species-scoped choices such as breeds or colors in the intended forms.
4. Use Remove only when an option should stop appearing for new selections. Historical values remain attached to existing records.
5. Open Modules to review enabled features. Disabling a module hides functionality and does not delete its records.
6. Review the effect on workspaces, report availability, and staff workflows before any approved module change.
7. Open the affected form or navigation afterward to confirm the choices and visibility are correct. Keep staff permissions separate from module settings.

Screenshots

Figure 1. Lookup Lists manages the choices used in staff forms.



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Settings

Configuration

Manage organization choices, modules, and agency settings without changing code.

Lookup Lists

Modules

Organization

Lookup Lists

Control the choices staff see in forms. Removing an option deactivates it so historical records keep their original value.

Show removed options

ANIMALS

Animal Species9

Animal Breeds164

Animal Colors71 +20

Animal Sex3

Altered Status4

Animal Record Status7

INTAKE & RELATIONSHIPS

Intake Reasons15

Person -- Animal Relationships6

FIELD & ENFORCEMENT

Call Types11

Call Priorities3

Case Types7

Intake Reasons

These reasons appear on New Intake. Add agency-specific reasons or remove system defaults your organization does not use.

Add intake reasons...

+ Add

Running at Large

Order0

Remove

Stray / Unknown Owner

Order10

Remove

Owner Surrender

Order20

Remove

Abandoned

Order30

Remove

Bite Quarantine

Order40

Remove

Protective Custody

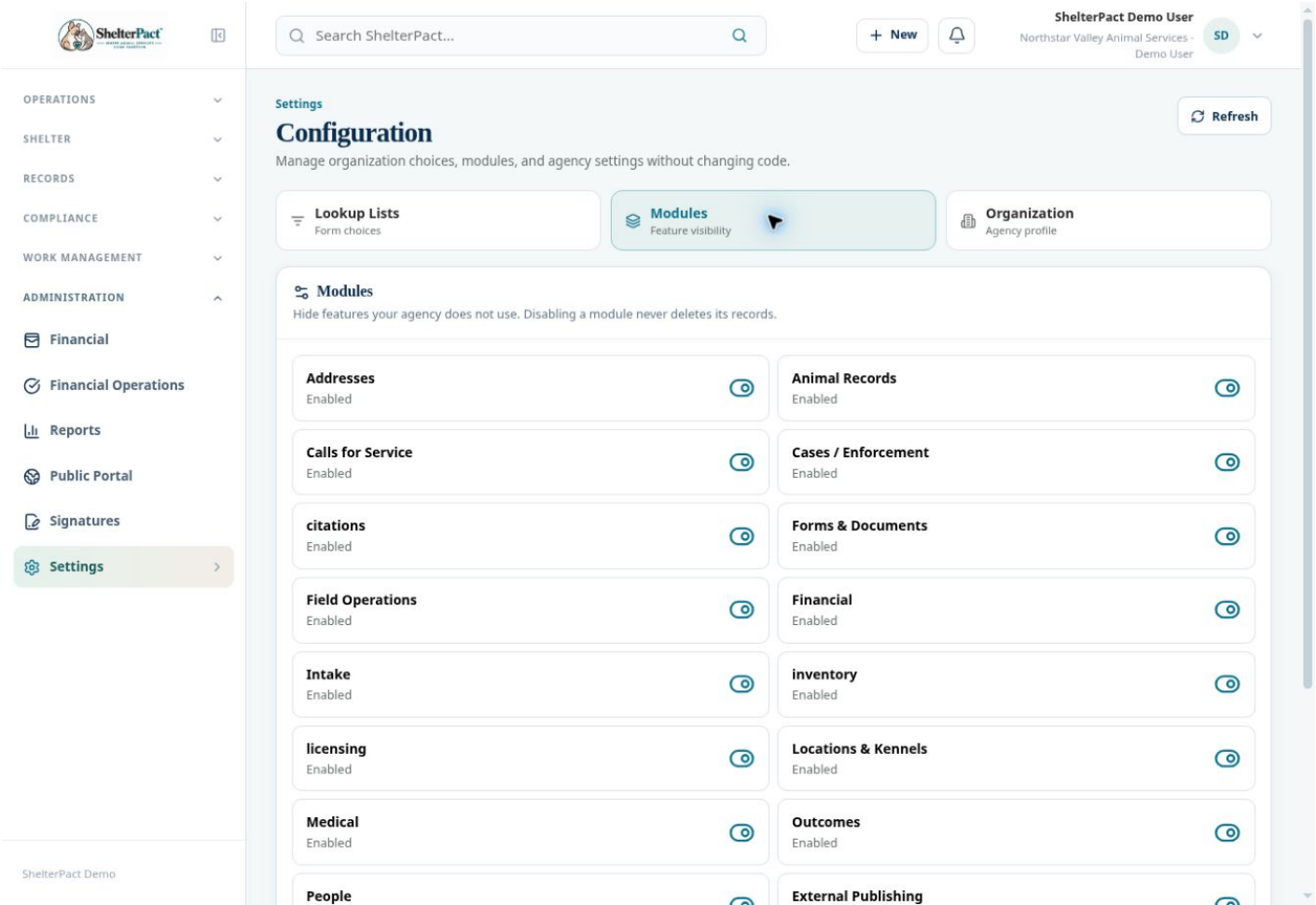
Order50

Remove

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Figure 2. Modules controls feature visibility without deleting history.



Practical checks

Removing a choice is not the same as correcting an existing record containing that choice.

Troubleshooting

What you see	What to check
The new choice is missing	Check its active state, category, scope, ordering, and the form's refreshed data.
A module is enabled but the page is absent	Review the staff role's view permission as well.

Configure Hold, Outcome, and Financial Rules

Organization rules define default timing and information requirements. They must reflect approved policy rather than demonstration values.

Before you begin: Open the relevant Settings card with authorized access: Hold Types & Rules, Outcome Types & Rules, or Compliance & Financial Rules.

Step-by-step instructions

1. In Hold Types & Rules, review each active type's expiration, review interval, notification lead time, and default blocking behavior.
2. Review release authorization, movement/outcome blocking, required case or call, required reason, notes, and instructions. Save only approved changes.
3. In Outcome Types & Rules, review active disposition types and whether each closes custody or requires a destination, person, or reason.
4. Review the Instructions displayed to staff. Use Save Changes for the intended type, and preserve accurate requirements for actual events.
5. Open Compliance & Financial Rules with configuration-management access to review renewal windows, citation timing, deposit behavior, and cashier review requirements. This management screen is restricted in the shared demo.
6. Review Fee Schedule separately for Optional, Required, or Disabled workflow fee behavior.
7. After approved changes, inspect a suitable test workflow for expected deadlines, blocking behavior, required fields, fees, and review requirements. Existing history should remain available.

Screenshots

Figure 1. Hold rules combine timing, authorization, and blocking requirements.

The screenshot displays the 'Hold Types & Rules' configuration page in ShelterPact. The left sidebar contains navigation links for OPERATIONS, SHELTER, RECORDS, COMPLIANCE, WORK MANAGEMENT, ADMINISTRATION, Financial, Financial Operations, Reports, Public Portal, Signatures, and Settings (highlighted). The top header shows the user 'ShelterPact Demo User' and a search bar.

Settings / Shelter

Hold Types & Rules

Set your agency's default hold periods, review timing, blocking behavior, and notification lead time. These are organization defaults and should be configured to match local law and policy.

Summary Cards:

- Active hold types:** 8 (Currently in use)
- Blocking by default:** 8 (Hold types block release)
- Automatic expiration:** 3 (Expiration is calculated)
- Review required:** 6 (Require staff review)

Organization Hold Rules

Manage default settings for each hold type. Inactive types remain available on historical records.

Stray Hold (Active)

Timing & Durations:

- Expiration hours: 72 (3 days)
- Review after hours: 0
- Notification lead time: 12 (Notify assigned staff before the earliest review or expiration.)

Behavior Settings:

- Blocking hold: ☒
- Review required: ☐
- Supervisor/Admin release: ☐
- Block custody outcome: ☒
- Require linked call: ☐
- Require notes: ☐
- Auto-calculate expiration: ☒
- Release authorization: ☒
- Block shelter movement: ☐
- Require linked case: ☐
- Require reason: ☒

Instructions:

Default holding period only. Configure this value to match local ordinance and agency policy.

Bite Quarantine (Active)

Timing & Durations:

- Expiration hours: 240 (10 days)
- Review after hours: 216

Behavior Settings:

- Blocking hold: ☒
- Review required: ☒
- Supervisor/Admin release: ☒
- Auto-calculate expiration: ☒
- Release authorization: ☒
- Block shelter movement: ☒

Instructions:

Default ten-day quarantine. Agencies must configure timing and release criteria to match

Figure 2. Outcome rules define required information and custody-closure behavior. (part 1 of 3)



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Settings / Shelter

Outcome Types & Rules

Control which dispositions your organization uses and what information each outcome requires.

Reclaimed by Owner

Link the reclaiming owner/custodian.

Active

Requirements

Select what information is required when this outcome is used.

☒ Closes custody

Ends the animal's current custody episode.

☐ Requires destination

Requires a receiving organization or destination.

☒ Requires person

Requires a linked person for the outcome.

☐ Requires reason

Requires staff to document a reason.

Instructions

Display these instructions to staff.

Link the reclaiming owner/custodian.

36/500

Save Changes

Adopted

Link the adopter.

Active

Requirements

Select what information is required when this outcome is used.

☒ Closes custody

Ends the animal's current custody episode.

☐ Requires destination

Requires a receiving organization or destination.

☒ Requires person

Requires a linked person for the outcome.

☐ Requires reason

Requires staff to document a reason.

Instructions

Display these instructions to staff.

Link the adopter.

17/500

Save Changes

Transferred

Enter the receiving organization or destination.

Active

Requirements

Select what information is required when this outcome is used.

☒ Closes custody

Ends the animal's current custody episode.

☒ Requires destination

Requires a receiving organization or destination.

Instructions

Display these instructions to staff.

Enter the receiving organization or destination.

Save Changes

ShelterPact Demo

Figure 2. Outcome rules define required information and custody-closure behavior. (part 2 of 3)

☐ **Requires person**
Requires a linked person for the outcome.

☐ **Requires reason**
Requires staff to document a reason.

48/500

Save Changes

Returned to Field / Released

Document release location and authority/reason.

Active

Requirements
Select what information is required when this outcome is used.

☒ **Closes custody**
Ends the animal's current custody episode.
 ☐ **Requires person**
Requires a linked person for the outcome.

☒ **Requires destination**
Requires a receiving organization or destination.
 ☒ **Requires reason**
Requires staff to document a reason.

Instructions
Display these instructions to staff.

Document release location and authority/reason.

47/500

Save Changes

Euthanized

Document reason and corresponding medical record.

Active

Requirements
Select what information is required when this outcome is used.

☒ **Closes custody**
Ends the animal's current custody episode.
 ☐ **Requires person**
Requires a linked person for the outcome.

☐ **Requires destination**
Requires a receiving organization or destination.
 ☒ **Requires reason**
Requires staff to document a reason.

Instructions
Display these instructions to staff.

Document reason and corresponding medical record.

49/500

Save Changes

Died in Care

Document known or suspected cause when available.

Active

Requirements
Select what information is required when this outcome is used.

☒ **Closes custody**
Ends the animal's current custody episode.
 ☐ **Requires person**
Requires a linked person for the outcome.

☐ **Requires destination**
Requires a receiving organization or destination.
 ☒ **Requires reason**
Requires staff to document a reason.

Instructions
Display these instructions to staff.

Document known or suspected cause when available.

49/500

Save Changes

Figure 2. Outcome rules define required information and custody-closure behavior. (part 3 of 3)

Escaped / Missing

Document circumstances and follow-up.

Active

Requirements

Select what information is required when this outcome is used.

☒ Closes custody

Ends the animal's current custody episode.

☐ Requires destination

Requires a receiving organization or destination.

☐ Requires person

Requires a linked person for the outcome.

☒ Requires reason

Requires staff to document a reason.

Instructions

Display these instructions to staff.

Document circumstances and follow-up.

37/500

Save Changes

Other

Describe the disposition clearly.

Active

Requirements

Select what information is required when this outcome is used.

☒ Closes custody

Ends the animal's current custody episode.

☐ Requires destination

Requires a receiving organization or destination.

☐ Requires person

Requires a linked person for the outcome.

☒ Requires reason

Requires staff to document a reason.

Instructions

Display these instructions to staff.

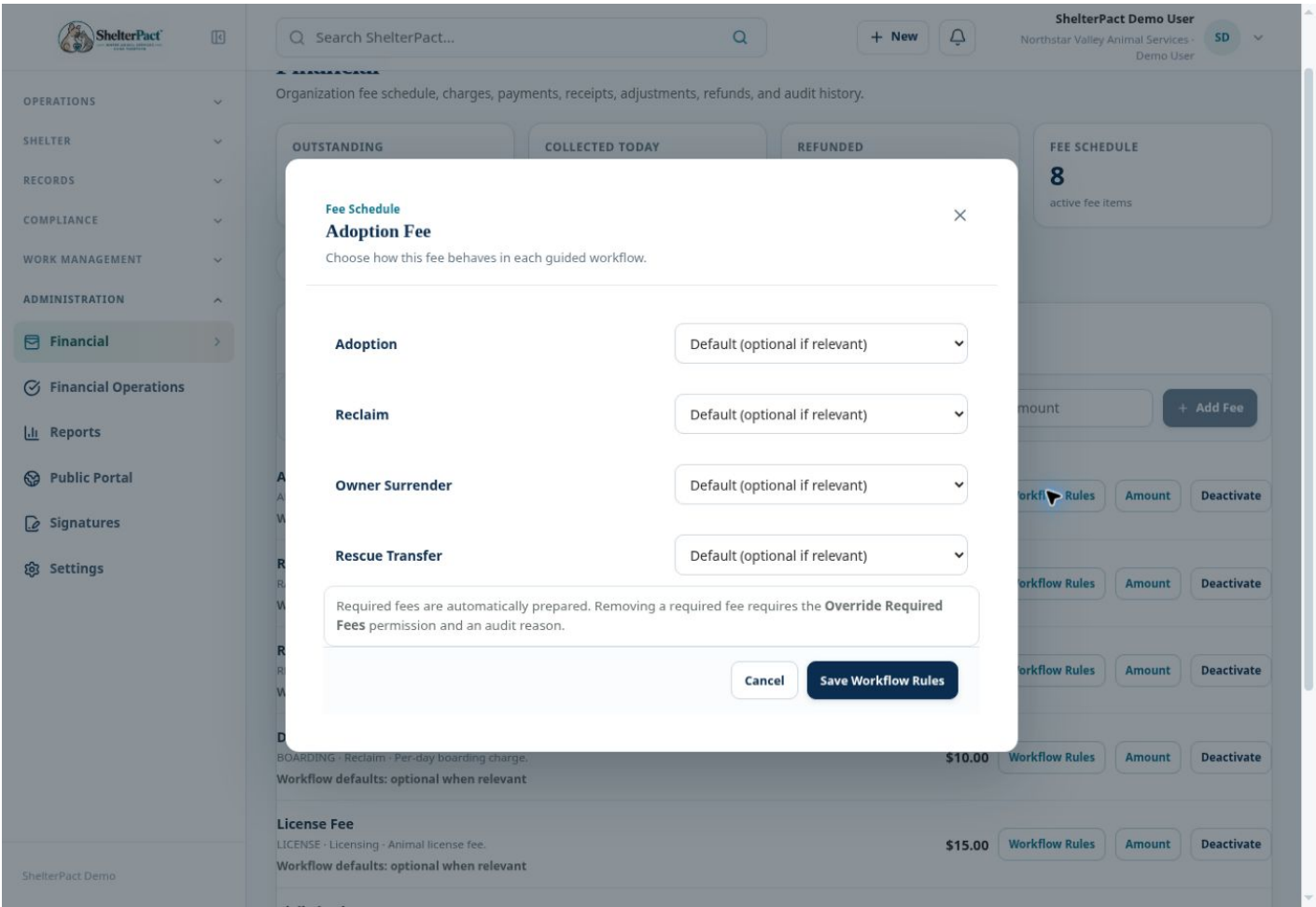
Describe the disposition clearly.

33/500

Save Changes

Deactivate an outcome type to remove it from staff selections while preserving historical records.

Figure 3. Fee requirements are configured separately by guided workflow.



Practical checks

A review reminder, expiration calculation, release authorization, and custody-closure rule are separate controls.

Troubleshooting

What you see	What to check
A workflow unexpectedly blocks	Review its individual record and the rules governing that type.
A setting is unavailable in the demo	Use a permissioned administrator in the customer environment; do not treat a visible Settings card as edit authorization.

Create Templates and Assign Automatic Documents

Forms & Documents maintains reusable templates. Automatic Documents assigns them to workflow events, with conditional rules, organization defaults, and built-in fallbacks.

Before you begin: Open Records / Forms & Documents / Templates with document-management access. Have approved document wording, merge data requirements, and signer roles available.

Step-by-step instructions

1. Review existing templates before creating a new one. Select New Rich Template for an editable ShelterPact document or Upload Standard PDF for a supported existing fillable PDF.
2. Enter Template name, Category, Description, and Template active state. Use Structured form when staff responses should be captured as fields.
3. For required signing, enable Requires electronic signature and configure signer Key, Label, Role, and Required state. Keep signer keys unique and meaningful.
4. Use the Visual editor for supported headings, lists, tables, alignment, and page breaks. Insert supported merge fields from the selector rather than guessing field names.
5. Insert signature blocks using the configured signer slots. Review Validate Template and the available preview controls before saving a valid template.
6. Open Settings / Automatic Documents. Select the workflow document and choose the organization default template or uploaded PDF.
7. Review signing requirement, generation timing, completion delivery policy, and any ordered conditional rules. Conditional rules run first, then the organization default, then the built-in fallback.
8. Save Automation when authorized. Test generation on a suitable nonproduction record and review merged values, signer slots, final PDF, and audit history.

Screenshots

Figure 1. The rich template editor separates formatting, merge fields, and signature blocks.

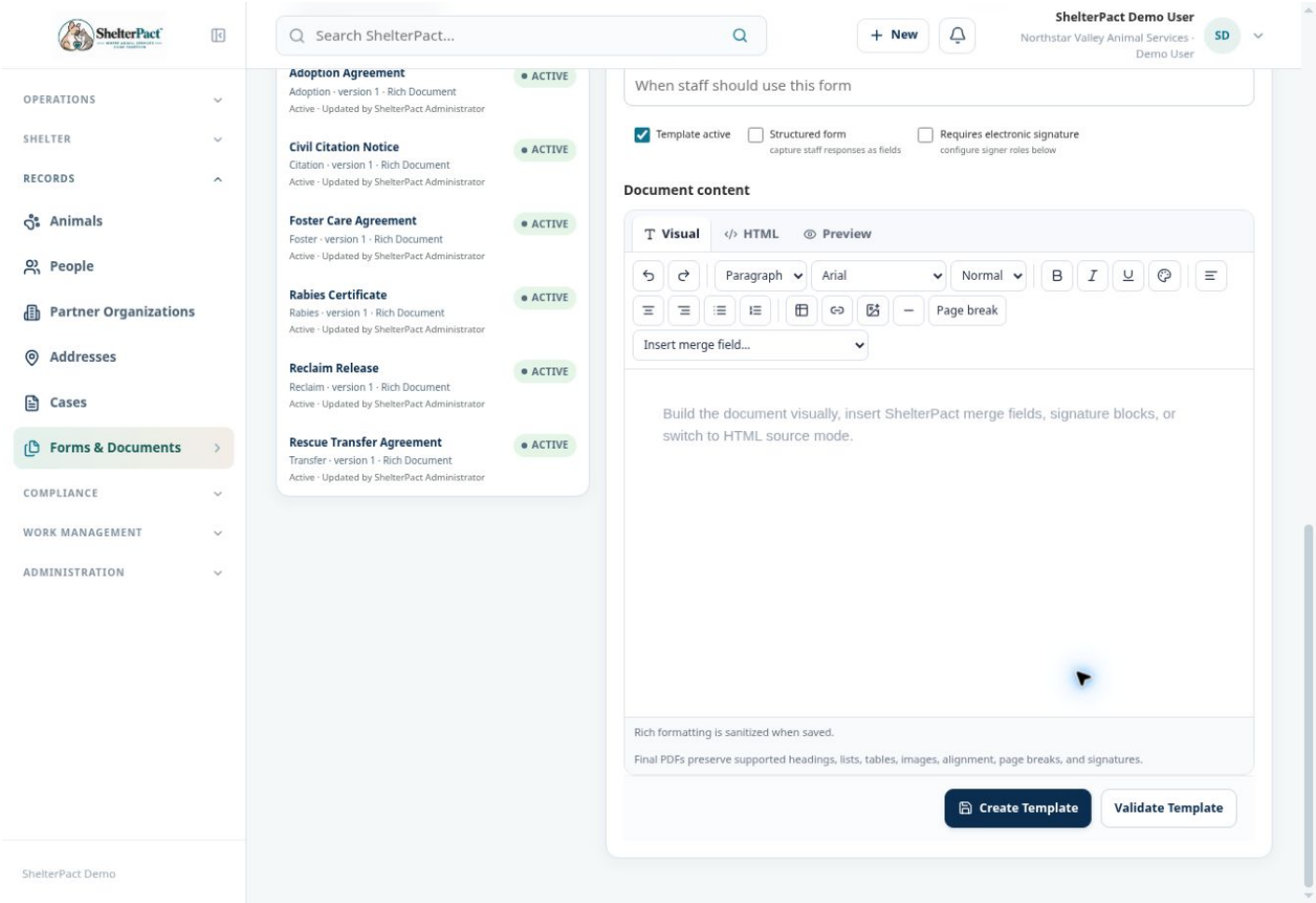
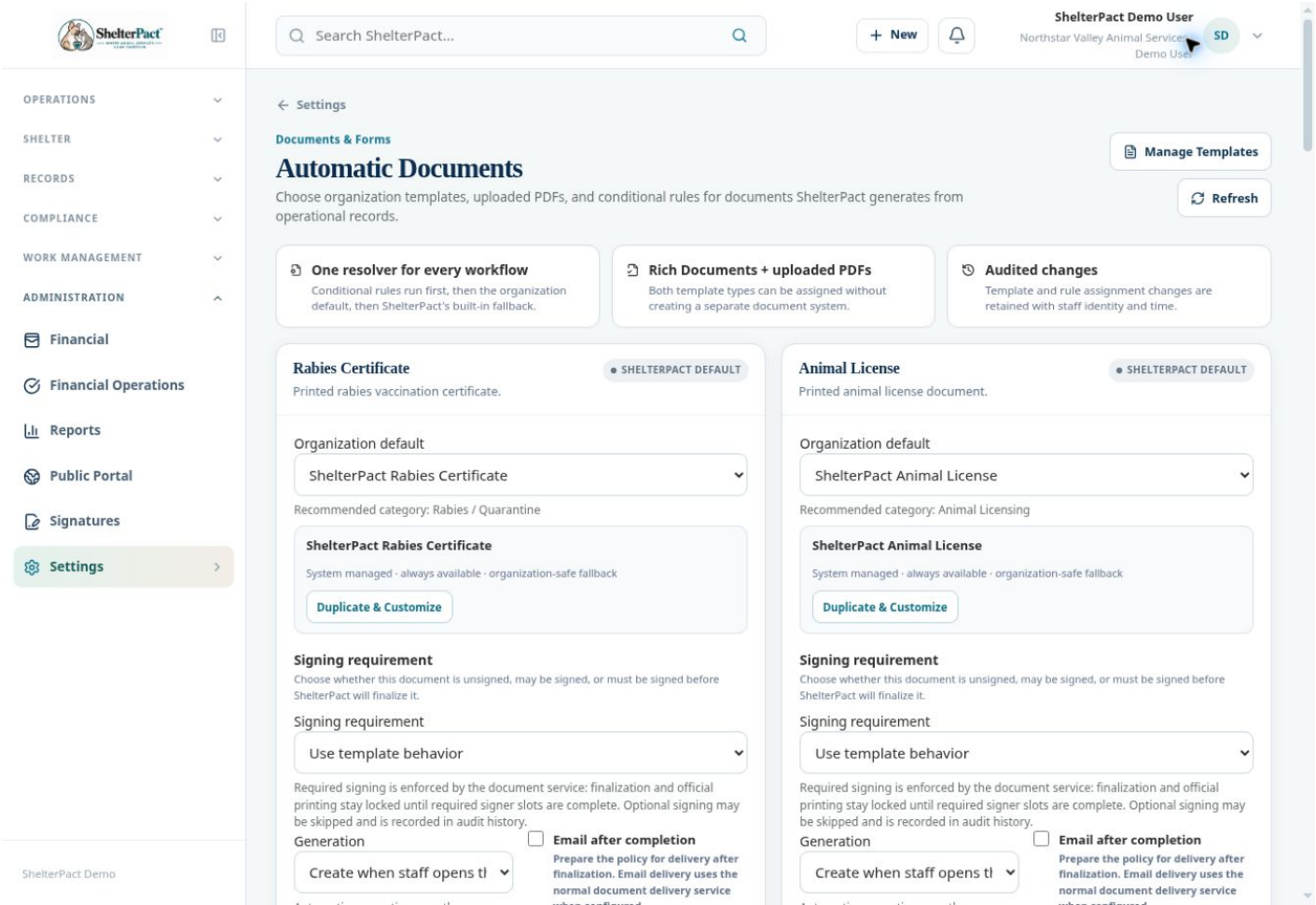


Figure 2. Automatic Documents controls workflow assignment and signing behavior.



Practical checks

Existing generated documents preserve their template and merge-data snapshots. Editing a template does not silently revise an already generated agreement.

Troubleshooting

What you see	What to check
Validation reports an unsupported template type	Use a supported rich-text or fillable-PDF template and have an administrator review the invalid template; do not assume a failed preview proves the template is usable.
A merge field is blank	Review the selected field, actual linked source record, and required record data.
The wrong document is generated	Review conditional rule order, organization default, and fallback selection.

Review Signatures, Final PDFs, and Document Revisions

Document Center gathers generated documents, signer progress, completion, final PDFs, delivery, revision history, and audit status.

Before you begin: Open Administration / Signatures. Confirm the document and source record before signing or completing anything.

Step-by-step instructions

1. Choose Needs attention, Draft, Completed, or All documents. Search the document title or template to locate the correct record.
2. Open the document and review its linked animal, person, case, or workflow, content, template snapshot, and revision.
3. Review every required signer slot. Use the supported in-person or remote signing process for the actual signer and authority; do not use a staff signature as another person's signature.
4. Complete required fields and signatures. Required signing blocks finalization until the configured slots are satisfied.
5. Finalize through the displayed completion controls when authorized, then review the final PDF and its status.
6. Use download, delivery, integrity, and history controls as available. Review the intended recipient before sending a document.
7. For a material correction, use the document's available revision/correction workflow. Keep prior versions and audit information rather than editing a signed final PDF outside the record process.

Screenshots

Figure 1. Document Center shows status, signature progress, and revision history. (part 1 of 2)



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Documents

Document Center

One place for generated documents, signing, completion, final PDFs, delivery, revision history, and audit status.

0 Needs attention

0 Draft

6 Completed

8 All documents

Search document title or template...

8 documents

Document	Type	Status	Signatures	Revision	Created	
Demo Civil Citation Notice - Ranger - Revision 2 Civil Citation Notice	citation	COMPLETED	2/2 · required	2	10/11/2026, 2:27:30 PM	View →
Demo Adoption Agreement - Milo - Revision 2 Adoption Agreement	adoption	COMPLETED	2/2 · required	2	10/11/2026, 2:27:30 PM	View →
Demo Foster Agreement - Atlas Foster Care Agreement	Foster	COMPLETED	2/2 · required	1	10/11/2026, 2:20:22 PM	View →
Demo Rescue Transfer Agreement - Cleo Rescue Transfer Agreement	Transfer	COMPLETED	2/2 · required	1	10/11/2026, 2:20:22 PM	View →
Demo Adoption Agreement - Milo Adoption Agreement	adoption	VOIDED	0/1 · required	1	9/26/2026, 12:15:25 PM	Open →
Demo Reclaim Release - Piper Reclaim Release	reclaim	COMPLETED	1/1 · required	1	9/25/2026, 12:15:25 PM	View →
Demo Rabies Certificate - Maple Rabies Certificate	rabies	COMPLETED	Not required	1	9/24/2026, 12:15:25 PM	View →
Demo Civil Citation Notice Civil Citation Notice	citation	VOIDED	0/1 · required	1	9/23/2026, 12:15:25 PM	Open →

ShelterPact Demo

Figure 1. Document Center shows status, signature progress, and revision history. (part 2 of 2)

Figure 2. A workflow-generated agreement shows required signer progress before completion. (part 1 of 2)

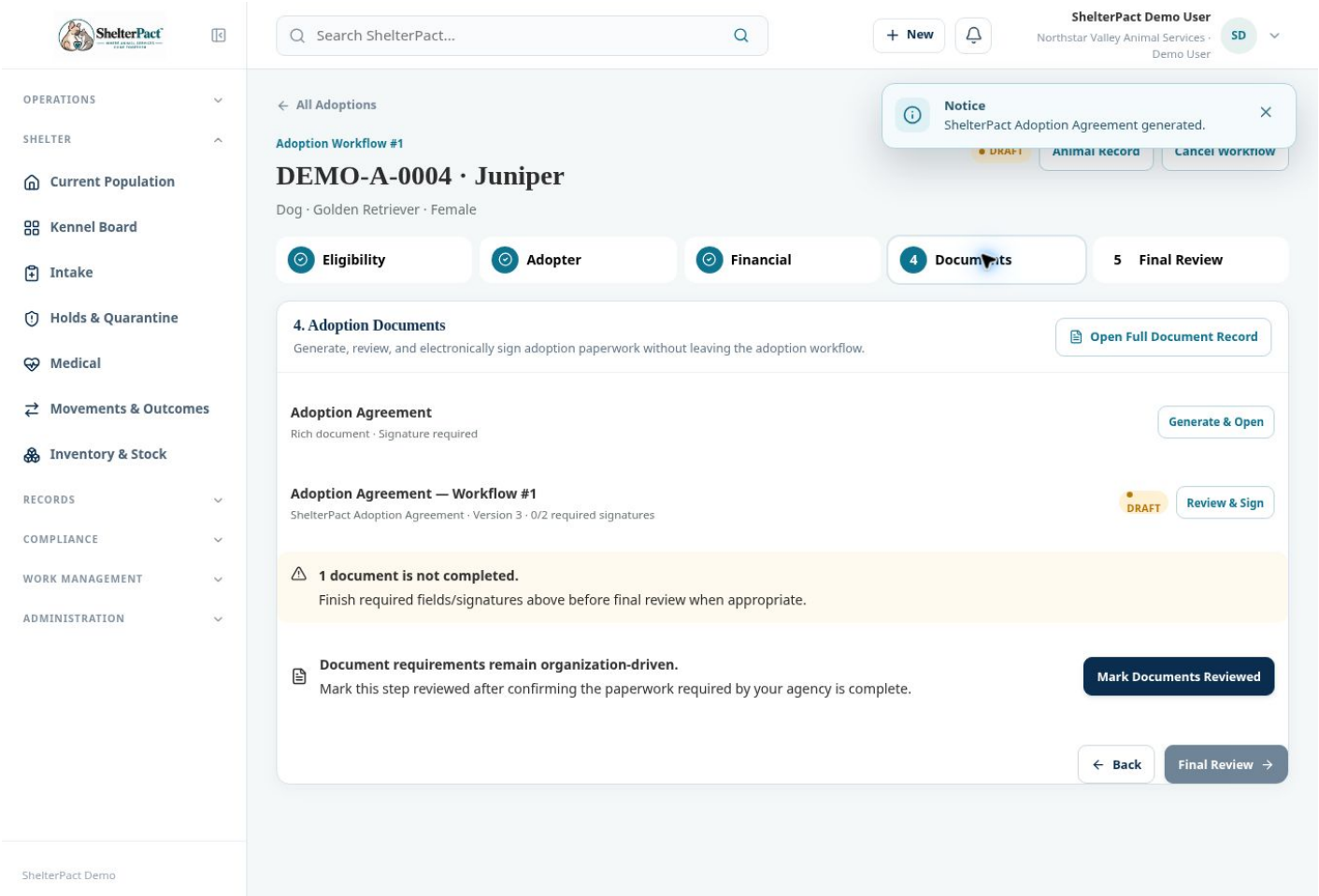


Figure 2. A workflow-generated agreement shows required signer progress before completion. (part 2 of 2)

Practical checks

My Signature manages a staff signature. It does not remove the need to review the document or fulfill other signer roles.

Troubleshooting

What you see	What to check
Finalization is locked	Review required fields, signer slots, and document status.
An old generated document differs from the updated template	That is expected snapshot behavior; use an appropriate revision process.

Export Organization Data and Review Supported Imports

Data & Backups separates a portability export from supported customer migration and disaster-recovery backup controls. Know which type of package you are using.

Before you begin: Open Settings / Data & Backups with appropriate access. Have a secure approved destination for exported organization data.

Step-by-step instructions

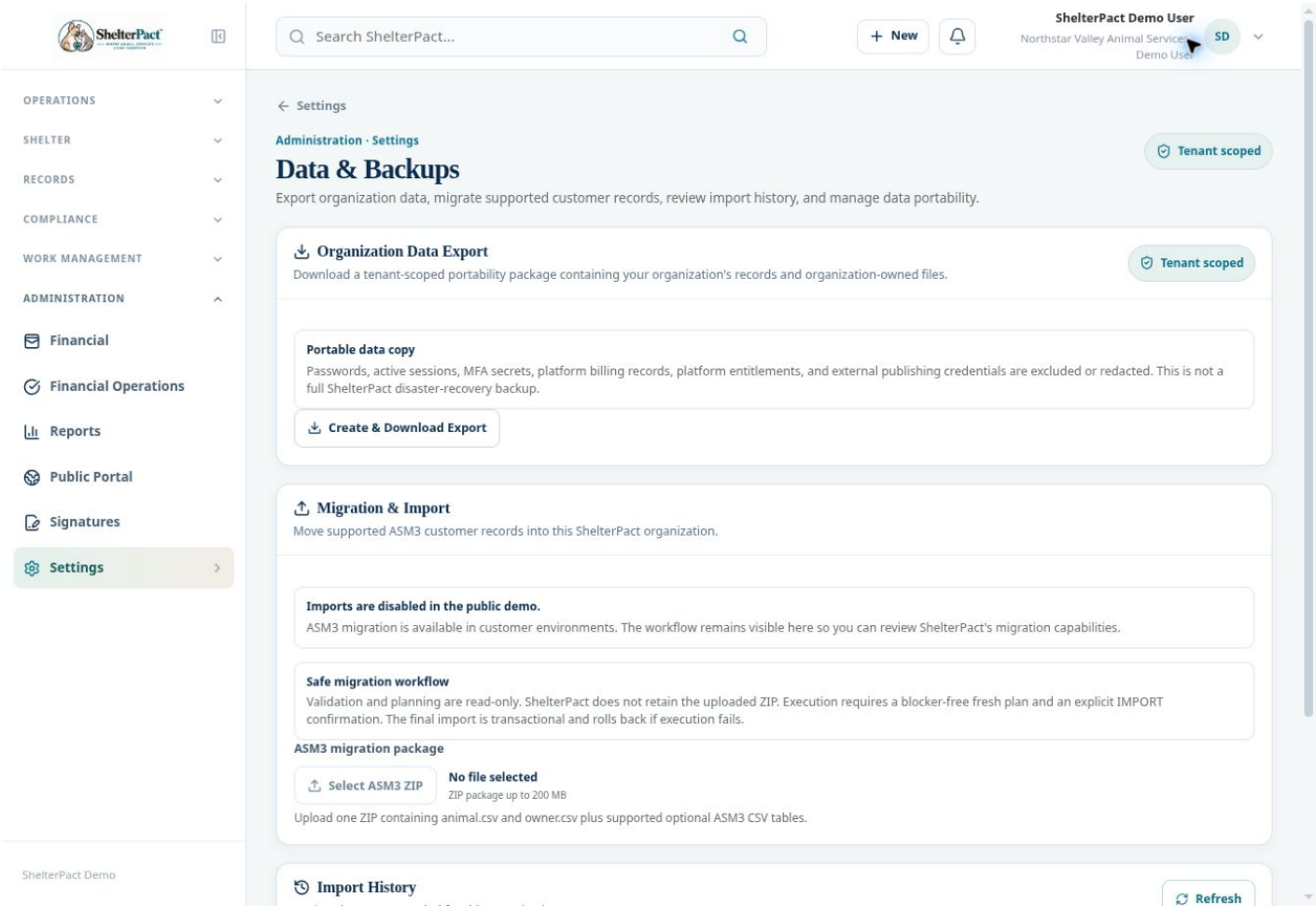
1. Read Organization Data Export and its exclusions. Create & Download Export produces a tenant-scoped portability package of organization records and organization-owned files.
2. Treat the exported package according to your agency's data-handling policy. It may contain operational data even though passwords and some platform/security information are excluded.
3. Do not treat the portability package as a complete ShelterPact disaster-recovery backup. Full backup/restore controls appear only when that feature is enabled.
4. For supported ASM3 migration in a customer environment, prepare one ZIP containing animal.csv and owner.csv plus supported optional ASM3 CSV tables.
5. Use the migration workflow to validate and plan before execution. Resolve blockers and review source mappings and proposed records.
6. Execute only with a fresh blocker-free plan and the explicit IMPORT confirmation required by the workflow. The public demo disables import execution.
7. Review Import History and verify important imported records, relationships, counts, and source mappings after a completed migration. Retain the approved migration evidence.

Fields and meanings

Field / control	What to review
Portability export	Organization records and organization-owned files.
Excluded/redacted	Passwords, sessions, MFA secrets, platform billing/entitlements, and publishing credentials.
ASM3 package	animal.csv and owner.csv plus supported optional CSV tables; displayed ZIP limit 200 MB.
Execution	A fresh plan without blockers and explicit IMPORT confirmation; disabled in the demo.

Screenshots

Figure 1. Data & Backups explicitly distinguishes portability, migration, and backup availability.



Practical checks

Review migration in a suitable customer test environment before importing operational data. Do not assume every table from another product is supported.

Troubleshooting

What you see	What to check
The import controls are disabled	That is intentional in the public demo.
Required CSV files are missing	Correct the package structure before validation.
A portability export is offered as a restore backup	Clarify the package type and actual disaster-recovery capability before relying on it.

Review External Publishing Readiness and Provider Mappings

External Publishing prepares animal information for adoption networks. Eligibility, mapping, preview, connection, transport, and successful publication are different states.

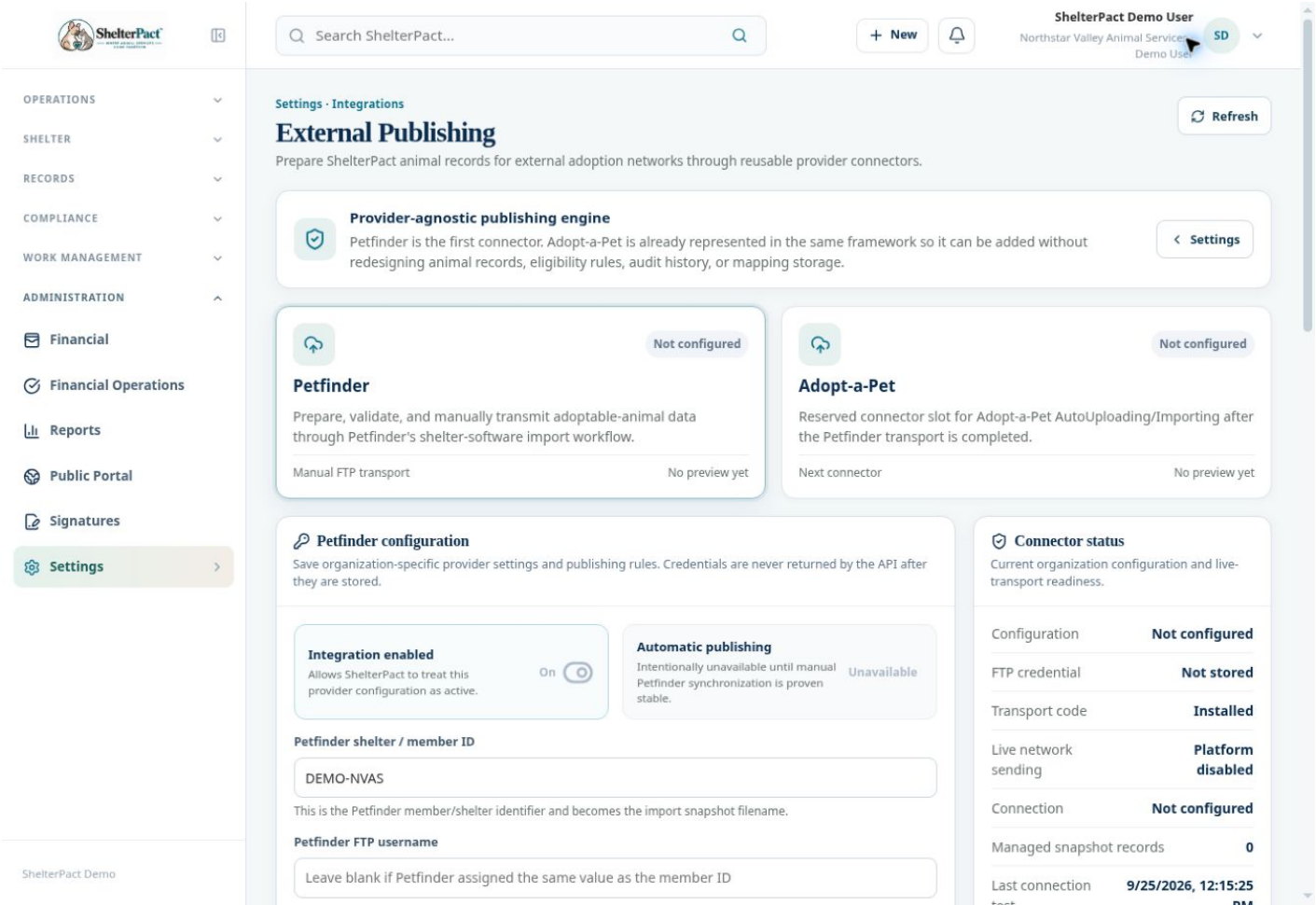
Before you begin: Open Settings / External Publishing with the relevant publishing permission. Use authorized provider credentials only through the approved settings process.

Step-by-step instructions

1. Review the provider's configuration and Connector status, including whether transport and live network sending are available.
2. Review Integration enabled and organization/provider identity. Automatic publishing is unavailable in the inspected demo; Adopt-a-Pet is a reserved connector slot.
3. Review eligibility rules for primary photo, breed, known sex, active custody, and exclusion of blocking holds.
4. Update the animal's appropriate Public Adoption Profile and identity fields before preparing the provider data. Keep internal notes separate.
5. Review species, breed, sex, and color mappings so ShelterPact values resolve correctly for the provider.
6. Use Eligibility Preview and Prepared Export Preview as available. The prepared preview validates data without transmitting it.
7. Review connection testing and synchronization controls only when the provider is configured and live transport is authorized. The demo platform safety switch disables live sending.
8. Use Recent activity and Last successful upload to verify an actual transport result; a completed preview alone is not publication.

Screenshots

Figure 1. Publishing status distinguishes provider configuration, preparation, and live transport.



Practical checks

Do not assume a public profile, configured connector, or prepared snapshot means the animal is already listed externally.

Troubleshooting

What you see	What to check
An animal is excluded	Review missing public data, active custody, blocking holds, and mappings.
Sync Now is unavailable	Review configuration, preview freshness, transport status, permissions, and the platform safety switch.

Manage Public Portal Requests and Citizen-Facing Services

Public Portal gives staff a queue for public submissions and a separate organization-branded service page. A submitted request still needs staff review and the appropriate operational workflow.

Before you begin: Open Administration / Public Portal. Confirm the organization and service configuration before processing requests.

Step-by-step instructions

1. Review Overview for recent requests, applications, and balances. Use Requests for all public submissions and Applications for adoption, foster, and rescue applications.
2. Filter by request type and status, open the intended submission, and review information, attachments, status history, balance, and linked records/workflows.
3. In a customer environment, use available authorized processing actions to review, request information, approve, schedule, or complete the appropriate work. The shared demo disables status-changing actions.
4. Use Payments to review portal amounts, but treat Financial as the authoritative ledger. Check the linked charge and payment rather than assuming a displayed request status represents full ledger reconciliation.
5. Use Settings to review enabled services and instructions. Services include licensing, citation payments, reclaim links, applications, surrender requests, lost/found reports, and public status pages as configured.
6. Use Public Links to open or copy the approved service link. Reclaims use the secure link issued by the agency rather than a general public reclaim search.
7. Open Public Portal to inspect the citizen-facing page and verify branding, instructions, and enabled services. Review request status and the linked staff workflow after processing.

Screenshots

Figure 1. Requests exposes review filters while the shared demo restricts processing.

PUBLIC PORTAL

Requests

Review and manage all public portal submissions.

← Back to ShelterPact

Overview

Requests

Applications

Payments

Settings

Public Links

Public demo — read only.

Request details, status history, linked workflows, and balances are available for review. Approval, processing, payment, link renewal, and status-changing controls are disabled.

Public requests

Review and manage public submissions. 9 of 9 shown.

Refresh

Search reference, person, email, phone...

All request types

All statuses

REFERENCE	REQUEST	PERSON	STATUS	BALANCE	SUBMITTED
NVAS-DEMO-PORT-009 Demo	Citation Payment	Morgan Bennett morgan.bennett@example.com	Paid	\$0.00	9/26/2026
NVAS-DEMO-PORT-008 Demo	Animal License	Avery Carter avery.carter@example.com	Awaiting Payment	\$25.00	9/25/2026
NVAS-DEMO-PORT-007 Demo	Animal Reclaim	Taylor Hayes taylor.hayes@example.com	Awaiting Payment	\$50.00	9/24/2026
NVAS-DEMO-PORT-006 Demo	Found Animal Report	Riley Foster riley.foster@example.com	Completed	\$0.00	9/23/2026
NVAS-DEMO-PORT-005 Demo	Lost Animal Report	Casey Monroe casey.monroe@example.com	Submitted	\$0.00	9/22/2026
NVAS-DEMO-PORT-004 Demo	Owner Surrender Request	Jordan Reeves jordan.reeves@example.com	Scheduled	\$0.00	9/21/2026
NVAS-DEMO-PORT-003 Demo	Rescue Application	Taylor Hayes taylor.hayes@example.com	Submitted	\$0.00	9/20/2026

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Figure 2. The citizen-facing service page lists enabled organization services. (part 1 of 2)

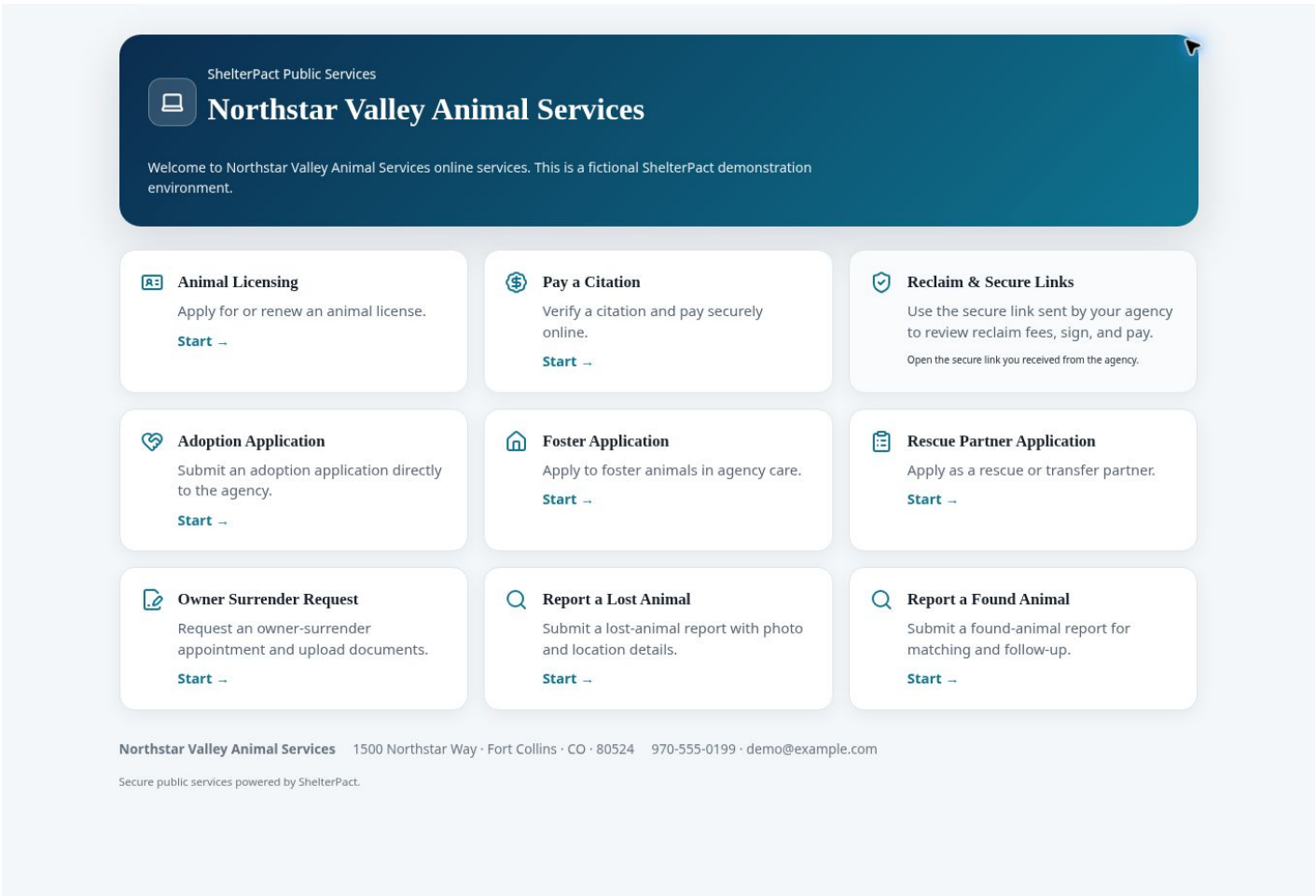


Figure 2. The citizen-facing service page lists enabled organization services. (part 2 of 2)

Practical checks

Do not mark a public request completed merely because it was submitted. Intake, adoption, payment, signing, and other operational events have their own completion requirements.

Troubleshooting

What you see	What to check
Processing controls are disabled	The shared demo is read only for portal management, or your role may lack the required permission.
The citizen cannot find a service	Review enabled portal services and the correct organization link.

Review Data Retention, Archives, and Purge Eligibility

General retention rules govern selected completed operational records, not every record in ShelterPact. Archiving and permanent purge are separate steps.

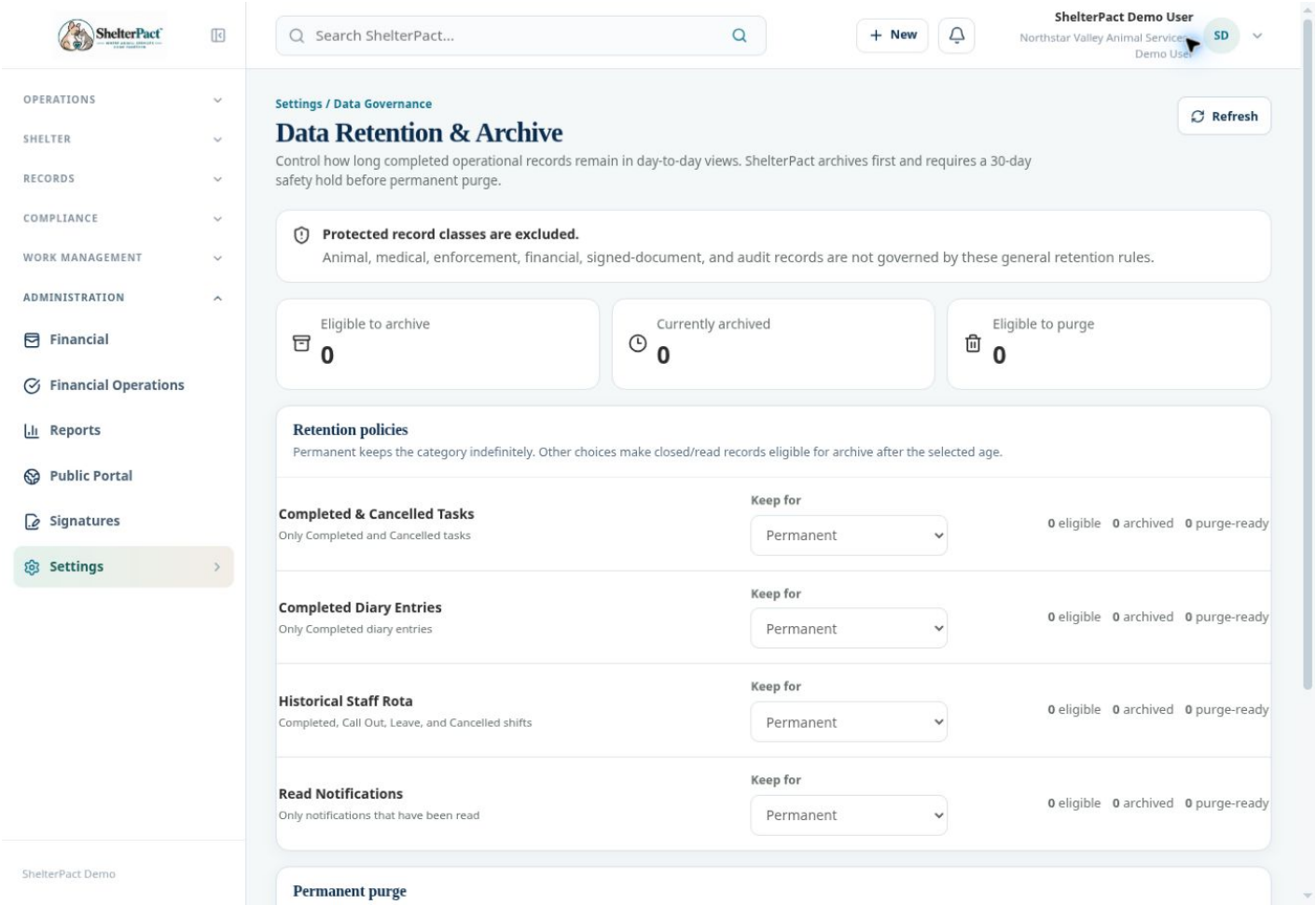
Before you begin: Open Settings / Data Retention & Archive with appropriate authority. Follow your agency's approved record-retention requirements.

Step-by-step instructions

1. Read the Protected record classes notice. The inspected general retention rules exclude animal, medical, enforcement, financial, signed-document, and audit records.
2. Review policies for Completed & Cancelled Tasks, Completed Diary Entries, Historical Staff Rota, and Read Notifications.
3. Review Permanent or the available retention periods and the count of eligible records. Confirm the category and record state before any policy change.
4. Preview and review eligible archive work using the available controls. Archive only approved eligible records and inspect the resulting counts.
5. Review Currently archived and Eligible to purge separately. The workspace requires at least 30 days in archive before purge eligibility.
6. Permanent purge requires a reason and is permanently audited. Review the specific records and obtain the required authority before using any destructive control.
7. Review Retention audit for policy changes, archive runs, and purge actions. Preserve protected operational histories.

Screenshots

Figure 1. Retention policies distinguish eligible operational categories, archives, and permanent audit history.



Practical checks

This is a software workflow guide. Configure retention according to your approved agency requirements rather than choosing a shorter period for convenience.

Troubleshooting

What you see	What to check
An animal or financial record is not eligible	Those classes are excluded from these general retention rules.
Archived records are not purge-ready	Review archive age, eligibility, permission, and the required reason.