



Shelterly Quick Reference Search

Summary

Search is available for animals, owners, service requests, dispatch assignments, and veterinary tasks.

Using Address Finder on a Map

The **HOTLINE** module map and the **DISPATCH** modules both have Address Finder on the maps on their landing pages.

- Hotline map Address Finder is useful for quickly finding an SR by address or for looking at SRs in a neighborhood or geographical area.
- Dispatch map Address Finder is useful for finding a DA by SR address or checking which DA an SR has been assigned to.

Using the SEARCH Module

Select **ANIMALS**, **OWNERS**, **SERVICE REQUESTS**, **DISPATCH ASSIGNMENTS**, or **VETERINARY TASKS** as appropriate. A full list will load, which users can scan and select from if the list is short.

- **Search Animals**
 - Search by **ID #** if known, which here means Animal ID #.
 - Main **Search** searches the following fields
 - Name, microchip, address fields, and owner last names.
 - Hover over the ⓘ icon on the search button for a list of the searchable fields.
 - **Advanced Search**
 - Use appropriate field to search by Species, Status, Sex, Owned (if owner is in system), Fixed, Color (available options change by species), and/or Shelter.
 - Drop the pin on the map to search a one, two, or five-mile radius of that spot. Adjust radius using pull-down menu.
- **Search Owners**
 - Search by **ID #** if known, which here means owner ID #.
 - Main **Search** searches the following fields
 - Name, phone number, email, drivers license, address fields, and animal names.
 - Note: phone number search will return a false negative if parenthesis or hyphen are included. Search for 1234567890, not (123) 456-7890.
 - Hover over the ⓘ icon on the search button for a list of the searchable fields.
 - Default is **Owner**. Change to **Reporter** if desired. If there's any doubt, search both.
- **Search Service Requests**
 - Search by **ID #** if known, which here means SR #.
 - Main **Search** searches the following fields
 - Address fields, animal names, and animal owner last names.
 - Hover over the ⓘ icon on the search button for a list of the searchable fields.
- **Advanced Search**
 - Use appropriate field to search by Status, Priority, Opened Start Date, and/or Opened End Date.

- **Search Dispatch Assignments**
 - Full list of DAs will appear. User can scan and select the correct DA if list is short.
 - Search by **ID #** if known, which here means DA #.
 - Main **Search** searches by
 - Team name, team member names, animal names, and service request address fields.
 - Hover over the ⓘ icon on the search button for a list of the searchable fields.
 - Default is **Active**. Change to **Preplanned** or **Closed** if desired.
 - **Filter by Date Range**. Use to specify the time period to search.
- **Search Veterinary Tasks**
 - Default is **Veterinary Requests**. Change via pulldown menu to **Treatments, Diagnostics, or Procedures** if desired.
 - **Advanced Search**
 - Use appropriate field to search by Open/Closed/Canceled, Priority, Opener, Species, Shelter, and/or Select Open Date Range.

Notes

- Use the **ID #** search field if the # is known – it is the fastest and most reliable way to search.
- Avoid entering the ID # in the main **Search** field – it will return unrelated results in addition to the correct one.
- **ID #** searches may return a system error if there is no matching result.
- Search by phone number or address may be more successful than owner or animal names in cases of varied potential spellings or input error.
- Phone number search will return a false negative if parenthesis or hyphen are included. Search for 1234567890 or 123 456 7890, not (123) 456-7890 or 123-456-7890.
- Remember owner address and SR address are not necessarily the same, and animals reported by non-owners or by first responders might not have associated owner information in Shelterly.
- Remember some entries may be incomplete, and so it may take creativity and perseverance to find the correct result.
- Editing in more information as it becomes available improves searchability, as well as other benefits.
- Tip: When animal species is “other”, enter species information in **Breed/Description, Instructions for Field Team**, and in parenthesis in the **Name** field. Entering in the **Name** field improves searchability.
 - Ex, “Unknown (badger)” or “Felix (wombat)”.