

# Software Options for Custodial Programs

*November 9, 2020*



## Introducing W4Sight



Independent software consulting firm specializing in non-profit solutions

Fundraising  
Case management  
Client management  
Financial systems  
Reporting and analysis



Founded in 2009, Chicago-based



We do not take money from vendors to represent or recommend their software.



## Introducing W4Sight



**Debbie McCann**, W4Sight Co-Founder, Partner

- 15+ years experience in nonprofit CRM software selection and implementation
- Parent of teenage horsewoman, been a “barn mom” for 8 years.



**Karen Diener**, W4Sight Consultant

- Over 20 years of experience as a nonprofit fundraiser and data administrator – knows how systems work IN REAL LIFE
- Drive a team of Percheron draft horses as a volunteer
- Parent of a teenage horsewoman, been a “barn mom” for 11 years





Custodial Organizations				
Equine Intake	Equine profile	Equine Services	Equine Outcomes	People and Organizations
<ul style="list-style-type: none"> <li>• Date</li> <li>• Origin</li> <li>• Reason</li> <li>• Health</li> <li>• Temperament</li> </ul>	<ul style="list-style-type: none"> <li>• Name</li> <li>• Breed</li> <li>• Color</li> <li>• Height / Weight</li> <li>• Gender</li> </ul>	<ul style="list-style-type: none"> <li>• Farrier visit</li> <li>• Vet visit</li> <li>• Medication</li> <li>• Training</li> <li>• Other assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Date</li> <li>• Outcome type</li> <li>• Contact person</li> <li>• Follow up</li> </ul>	<ul style="list-style-type: none"> <li>• Service providers (Veterinarians, Trainers, Farriers)</li> <li>• Donors</li> <li>• Volunteers</li> <li>• Adopters</li> </ul>

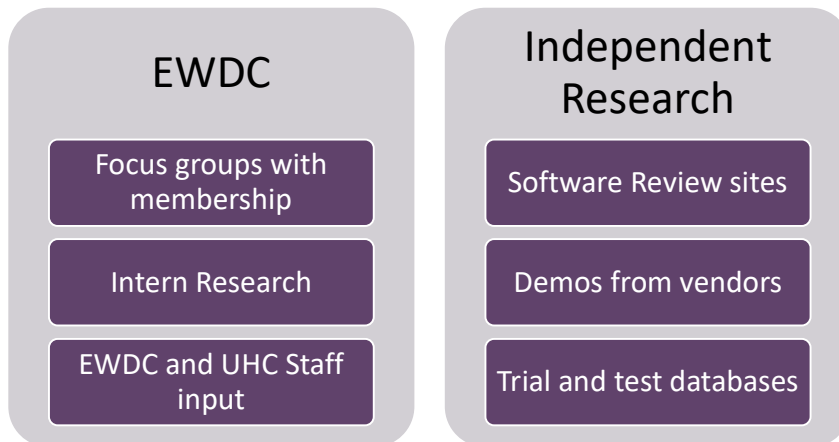


The requirement areas that we considered necessary for Custodial Organizations are highlighted here – this is NOT the comprehensive list. But these are the primary requirement categories that we identified, and some of the types of information that fell into each category.

The People and Organization Record Management column will apply to different organizations and at different levels.

All of the software we reference in this presentation covers all five of these categories to varied extent. Some are more configurable than others, and while some do a great job in one category, they may lack in another.

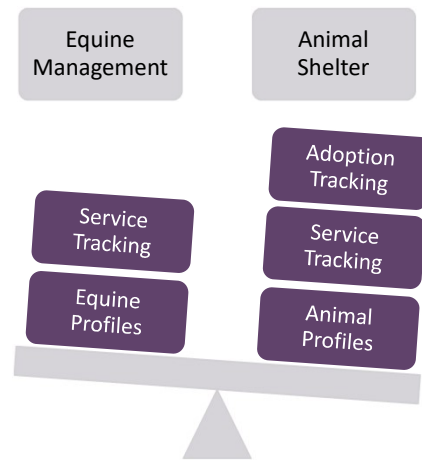
## Our Research Approach



The software possibilities seem endless, so how did we focus our research?

- We did some focus group discussions with EWDC members in June and July to talk about requirements for the data collection survey and other information you need to keep track of. This helped us fine tune the most important data that custodial organizations need.
- The EWDC provided a list of 77 (!) software options that an intern put together in May 2020
- From there, we searched for basic information online. Did the software name come up in search results, and could we learn anything about it within 5 minutes? Did it appear on websites that specifically focus on software review? What were highlighted features, pros, cons, user reviews, etc.
- We did demos with vendors if the software looked intriguing and if we could get them to call us back!
- A few systems offered 14 day trials, or fully functioning free test databases, so we spent time reviewing those.

## Software Selection is a Balancing Act



The two types of software areas we studied were those devoted to equine management, and those designed for animal adoption.

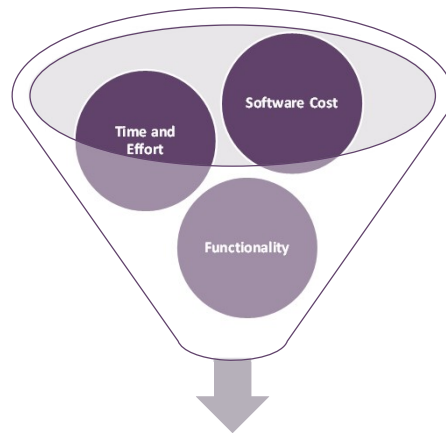
Equine management software easily handles the information about the equine with no customization, but doesn't always have features specifically for intake or outcomes, or adoptions. If your intake and adoption volume is low, an equine management system still may work for you.

Animal Adoption or Shelter software is very heavy on adoption information and animal profiles, but cannot always be customized for equine. You may have to give up some of the "nice to have" equine-specific information because you really need adoption software,

There is no perfect solution – you have to evaluate pros and cons, and find the right balance for your organization based on

- Volume of activity
- The cost of the software and your annual budget to implement and maintain the software
- Staff / volunteer time – it takes concentrated effort from everyone, and coordination from everyone to make sure procedures are followed

## Which software should I pick?



**The right software for you!**

These tend to be the three primary factors in determining software, and the value of each is different for every organization. Annual software cost might be the top priority for organization, while another organization needs very specific functionality and the cost is the second priority. You need to weigh all of these things – and possibly others – in order to make the right decision.

## Two software systems rose to the top



- Two software systems were at the top of our list for Custodial organizations for various reasons. This does not mean that another software on the list won't work for you, but these two seemed to be well suited for a broad variety of organizations.
- iShelters, Petestablished, and Rescue Connection are three other possible candidates, and we are including some comparative information on them in the remaining slides.
- Other software systems that are possibilities include [Horse Farm Management System](#), Pet Point, and RescueGroups.org Those did not make the final cut for this presentation, but information we learned about them will be made available to everyone.
- Research on all software systems – even those that we are not including as viable options – will be made available to everyone.



## Advantages and Disadvantages

### Shelter Manager

Low cost, highly configurable

Needs careful planning for effective configuration, and will require test runs

### Barn Manager


Low cost, friendly interface, equine-focused

Lacks adopter capability and petfinder integration



### Annual Subscription

Shelter Manager	Barn Manager
\$340	\$0
Flat fee, regardless of number of users or volume of animals	Free to 501(c)(3) rescue organizations



FYI that Shelter Manager is headquartered in England, and Paypal is currently the only option for overseas clients.

**Other considerations:**

- Do you have a computer available for staff or volunteer access?
- Do you have a good internet connection, or might you need an upgrade to your service?
- Does your staff have mobile phones and are you willing to allow them to access your data?
- Do you need to pay someone to enter data from your existing paper files?

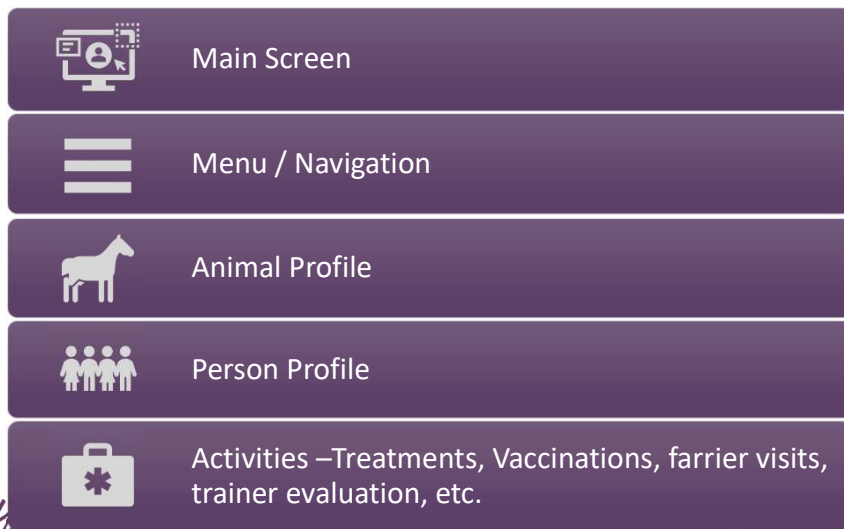
## Key differences

	Shelter Manager	Barn Manager	iShelters	Petstablished	Rescue Connection
Cost	●	●	●	●	●
Intake Volume	●	●	●	●	●
Staff Needs	●	●	●	●	?
PetFinder integration	●	●	●	●	●
Adoption Activity	●	●	●	●	●
Law Enforcement Engagement	●	●	●	●	●



- We are going to come back to this slide at the end. But I wanted to show you the five systems we're going to review.

## Look and Feel



The next few slides are our attempt to show you the basic “look and feel” of each software system. It can be difficult, especially on smaller screens, but at least you get a general idea. We did try to show the same type of screen for each system as well so that we can do a better comparison – an animal profile screen, person screen, medical / treatment / activity screen.

We did really try to get a lot of representation from each software system, but we were often left with what the vendor sent to us if we could not access the software ourselves. You’ll also see many slides in some situations, because they scroll down so far online.

## Shelter Manager

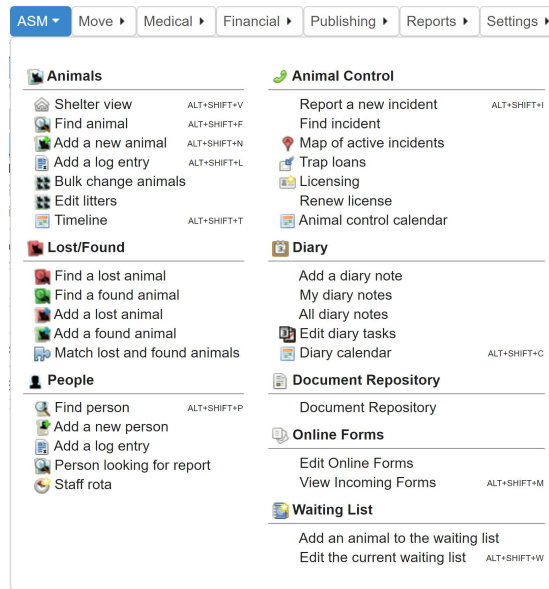


## Shelter Manager → Main Screen

The screenshot displays the 'Shelter Manager' main screen. At the top, a navigation bar includes links for 'ASM', 'Move', 'Medical', 'Financial', 'Publishing', 'Reports', and 'Settings', along with a search bar and a 'demo' button. Below this is a 'Quick Links' section with buttons for 'Shelter view', 'Foster book', 'Recently deceased', 'Up for adoption', 'Not for adoption', 'Foster an animal', and 'Adopt an animal'. A 'Did you know?' message states: 'When you use Move > Adopt an animal, ASM will automatically return any open foster or retailer movement before creating the adoption.' The 'Recently Changed' section shows a grid of animal profiles: Gordon, Bear, Murdoch, Boo, Romeo, Snoop, and Lynx. Below this is a 'Diary for demo' section with a date selector and a timeline of events. The 'Alerts (17)' section lists various notifications, and the 'Message Board' section is at the bottom right.

System-wide navigation is at the very top, and then there are quicklinks in the blue area. It does animals with recently changed information, and you can click on a profile to open that animal's record. It also displays recent diary, timeline, alert and message board activity, and everything is a clickable link.

## Shelter Manager → Menu Items



This view helps to see the overall categories. I have clicked on ASM (Animal Shelter Management) to see these broad categories that have to do with shelter management.

## Shelter Manager → Animal Profile

Add a new animal

☐ Non-Shelter  
☐ Hold until

Name

Date of Birth
or estimated age in years 1.0

Sex
Unknown

Type
U (Unwanted Cat)

Species
Cat

Fosterer

Entry Category
Unable to Cope

Registered Name


Create and edit
Create
Reset

This is the short form for a new animal. I highlighted the “Registered Name” field here because it is a field that I was able to add to the system AND make it appear on the short form. Notice that the buttons about the bottom allow me to create and further edit the record, or simply to create a record based on the fields I have entered

The Entry Category could be used as the Intake Reason, for those of you who are collecting that data.



## Shelter Manager → Animal Profile



**Milo - 001E**  
 Male Horse aged 5 years 5 months.

Location: **Old Barn**  
 Entered shelter: 08/03/2020  
 Left shelter:  
 Time on shelter: 12 weeks. (85 days)

Added by demo on 10/27/2020  
 Last changed by demo on 10/27/2020  
 ⚠ Not available for adoption  
 (No description)

Animal Vaccination Test Medical Clinic License Diet Costs Payments Media Diary Transport  
 Movements Log


Save Clone Document Diary Task Match Littermates Share

**Details**

Code	E2020001 001E	Species	Horse
Litter		Breed	Paint/Pinto
Name	Milo	Crossbreed	<input type="checkbox"/>
Sex	Male	Location	Old Barn
Type	Equine	Unit	
Color	Sorel	Flags	Select
Coat Type	Short	Date of Birth	05/07/2015 <input type="checkbox"/> Estimate
Size	Large	Adoption Fee	\$0.00
Weight	1000 lb 0 oz	Registered Name	IZ Heaven

- This is a screen shot from Shelter Manager. The fields that are highlighted in yellow indicate what I was able to customize, such as an equine-specific color rather than “brown and white”, the species, breed, and location. The Registered Name field is a completely new field that I was able to set up.
- Note that there are additional navigation buttons for this particular animal – vaccinations, tests, medical, clinic, etc.

## Shelter Manager → Person Profile



**Katinka Ødegaard - XX000004**  
Vet

Added by demo on 11/04/2020  
Last changed by demo on 11/04/2020

PersonLicenseInvestigationCitationsTrap LoansClinicPaymentsVouchersMediaDiaryMovements

LinksLog

SaveMergeDocumentDiary TaskLooking ForMapEmail

**Name and Address**

CodeXX000004

ClassIndividual/Couple

Title

Initials

First name(s)Katinka

Last nameØdegaard

Home Phone

Work Phone

Cell Phone

Email

JurisdictionLocal

Address

City

State

Zipcode




Person screen, where you can set up People or Organizations. You can add flags, such as Vet, which then allow the person to be linked to a medical activity.

The person could be someone who provides a service to your organization, such as a veterinarian, farrier, trainer, etc., but could also be an adopter or foster family.

## Shelter Manager → Treatment Activity

ASM ▶ Move ▶ Medical ▶ Financial ▶ Publishing ▶ Reports ▶ Settings ▶



**Milo - 001E**

Male Equine aged 5 years 5 months.

[Add a photo]

Location: **Old Barn**

Entered shelter: **04/08/2020**

Left shelter:

Time on shelter: **6 months, (205 days)**

Added by **demo** on 10/30/2020  
Last changed by **demo** on 10/30/2020

▲ Not available for adoption  
(Not for adoption flag set)

Animal **Vaccination** Test Medical Clinic License Diet Costs Payments Media Diary Transport

Movements

Type	Required	Given	By	Expires	Manufacturer	Cost	Comments
<input type="checkbox"/> Farrier visit	10/28/2020	10/28/2020	Katinka Ødegaard	12/22/2020		\$0.00	
<input type="checkbox"/> East encephalomyelitis	04/06/2020	04/07/2020	James Herriot	04/07/2021		\$0.00	

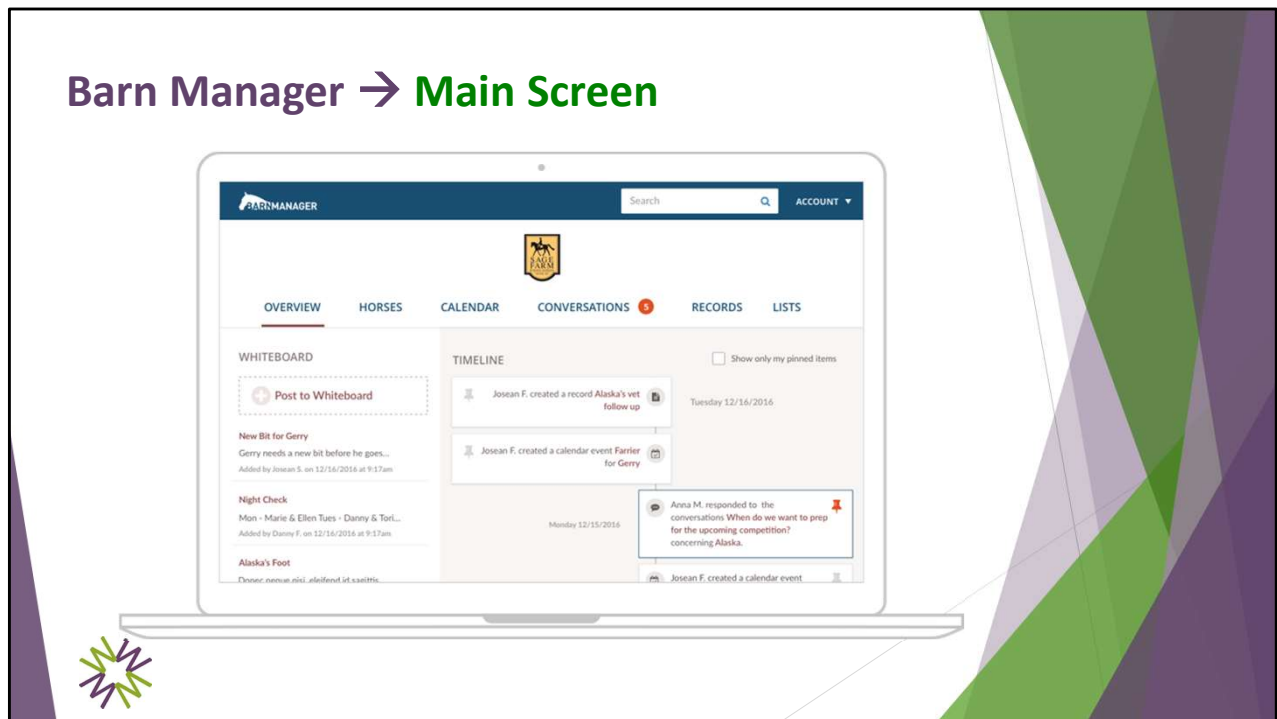


Vaccinations log. This is where the software becomes just a little bit more clunky. I added Farrier Visit here, primarily because these types of activities can be set to expire after a specific number of weeks or years. This allows me to keep better track of all visits in one location.

## Barn Manager

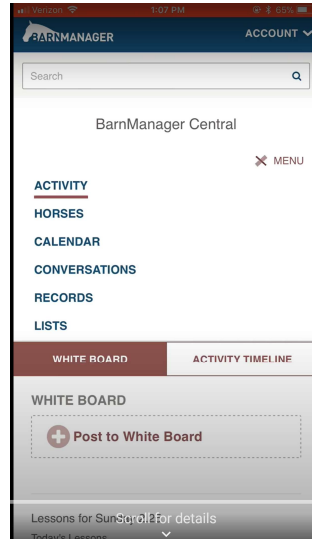


## Barn Manager → Main Screen



Barn Manager has one of the cleaner and more user-friendly interfaces out of all the software. This is a fairly generic screen shot of the main login screen that was available on their website. But it give you an idea of how clean the interface is, showing a whiteboard on the left – common to any barn I’ve been in – and a timeline of activity on the right.


## Barn Manager → Menu / Navigation



The navigation on Barn Manager is much cleaner than a lot of other products. This is a screen shot from one of the videos (linked later in this presentation) that shows the main menu and navigation.

## Barn Manager → Animal Profile

**HORSE DETAILS** Print Edit Archive

 **Captain**  
#67 Stall # 1

**BASIC INFO**

SEX	HEIGHT	WEIGHT
Gelding	16 hands, 3.00 inches	
COLOR	BREED	MARKINGS
Bay	Belgian Warmblood	Star and snip
SIRE	DAM	FOAL DATE
CATWALK VAN DE HELLE	CALYPSO DE FLOBECQ	6/1/2008
MICROCHIP	LOCATION	
981100000562707	Stall 1	

**USEF INFO**

USEF #	MEMBERSHIP	HORSE CARD
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Because Barn Manager is designed for equine, the “basic info” section does include equine-related fields and language

## Barn Manager → Medical Treatment

Lakin Horses

[← Back to Captain's details](#)

ADD A RECORD

TYPE OF RECORD REQUIRED

VET NAME

Vaccination

Select...

TITLE OPTIONAL

If no title is provided one will be automatically generated

DATE

MM/DD/YYYY

VACCINE

Type a keyword and then press enter

Attach a File

NOTES

Sans Serif Normal B I U G H1 H2

Specifically a medical treatment screen



## Barn Manager → Videos

- ▶ YouTube Channel with how-to videos
- ▶ User-submitted “How I Use Barn Manager” videos

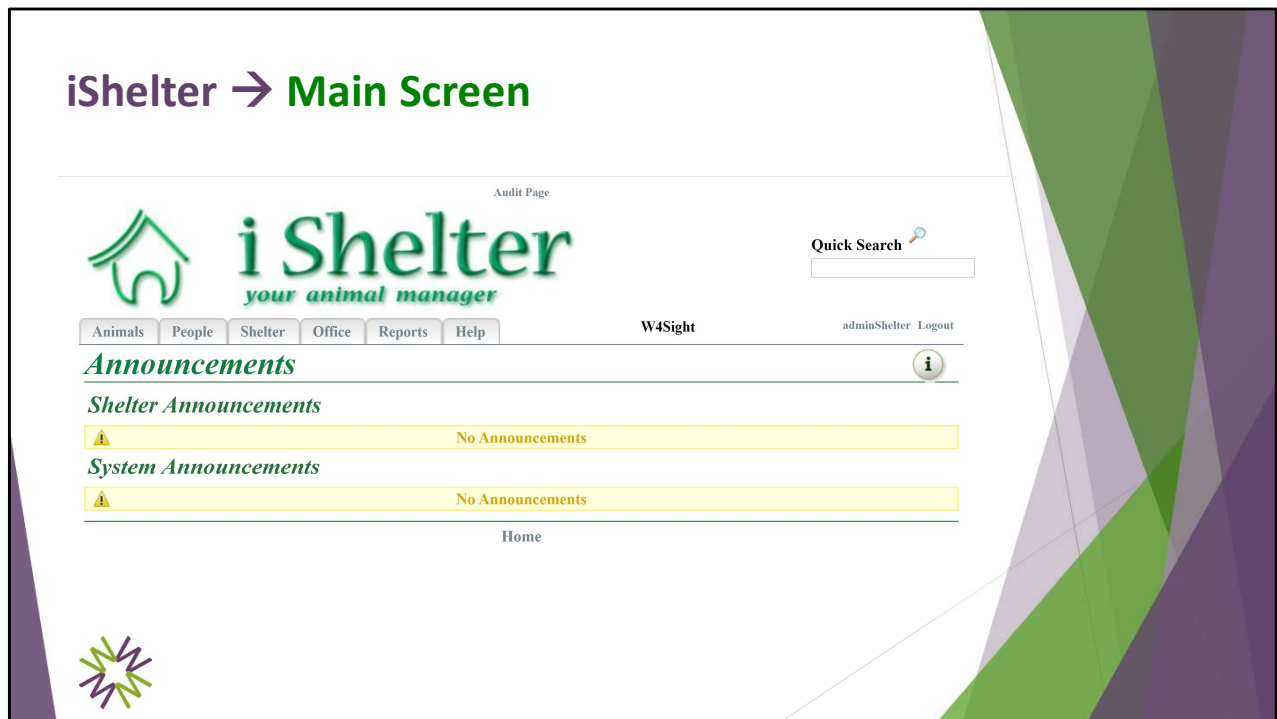


Barn Manager only sent two screenshots, but they did direct me to their YouTube channel with videos which are very helpful.

iShelters



## iShelter → Main Screen



This is the first screen you see when you log in to iShelter. Notice the adminShelter link over on the right – this is where you log in to add table entries and additional fields. You can stay logged in to both, and toggle back and forth.

## iShelter → Menu / Navigation



When you click on the Animals Tab, this is the screen you will see. This look is replicated if you click on People, Shelter, Office, or Reports.

## iShelter → Menu / Navigation

The screenshot displays the iShelter web application interface. At the top, the title "iShelter → Menu / Navigation" is shown. The application header includes the iShelter logo with the tagline "your animal manager", a "Quick Search" bar, and a navigation menu with tabs: Animals, People, Shelter, Office (selected), Reports, and Help. The user is logged in as "W4Sight" with a "Logout" link. The main content area is titled "Office - Karen Diener". It is divided into two columns. The left column contains "My Desk" (with links to "My Time Sheet" and "Change My Password") and "My Lists" (with links to "Animals Currently Assigned to Me (0)", "Animals No Longer Assigned to Me (0)", "Diet Chart for My Animals (0 animal(s) have a diet)", "My Recent Diary Entries (0 in the last 7 days)", "My Recent Shelter Expenses (0 in the last 7 days)", and "My Documents (0)"). The right column contains "My Alerts" (listing "Medical Check Ups Needed (0 in the next 7 days)", "Medical Procedures Needed (0 in the next 7 days)", "Vaccinations Needed (0 in the next 7 days)", "Diagnostic Tests Needed (0 in the next 7 days)", "MAR's Needed (0 upto today)", "TAR's Needed (0 upto today)", "Callbacks Needed (0 upto today)", and "Tasks Needed (0 in the next 7 days)") and "Search/Browse" (with "No Search Forms"). A "Home" link is at the bottom center. The interface is decorated with green and purple geometric shapes on the right and bottom edges.

This is the screen when you click on “Office”, which I am displaying because it is a nice way to roll up the activity that I am specifically responsible for.

iShelter → Animal Profile

Animals
People
Shelter
Office
Reports
Help

W4Sight
adminShelter Logout

Update/View Animal
-- Lists --
Profile Forms

Current/Last Location
Cattle run
Current/Last Health Stats
Weight :
Height :
Temp :
Size :
Boarding
Not Currently Boarded
Assigned To
None
Reports
Medical History
Personal History
Expense History

Name : IZ Heaven
Aliases : Milo
Species : Equine
Primary Breed : Pinto
Secondary Breed : AQHA
Cage # :
Code : 7693801361
Adoption Fee :
Animal Type : Domestic
Ready to be Adopted :
Display on the Web :
Active :

Submit

Once you open an animal profile, you stay on this one page and access different areas of the animal’s care through the small pictures at the top. Note that I was able to add options for Species and Breed.

Note that there are shortcut links to some profile information along the left. Some of these will result in a summary, such as a click on “Medical History” under “Reports”

## iShelter → Medical History

### Medical History - IZ Heaven

[Printer Friendly Version](#)

Code: 7693801361 DOB: 2015-05-08

#### Vaccinations

#	Given	Needed	Vaccine	Comments
1		2021-03-07	Rhino Trachitis/Feline Calicivirus	
2		2021-04-07	6 in 1	
3		2021-04-07	West Nile	

#### Medications

	No Medication Prescriptions			
--	-----------------------------	--	--	--

#### Medical Procedures

#	Performed	Needed	Procedure	Comments
1	2020-10-28	2020-10-28	Farrier	
2		2020-12-16	Farrier	

#### Check-Ups

#	Given	Needed	Weight	Temp	Comments	Recommendations
1		2020-12-16				

#### Diagnostic Tests

	No Diagnostic Tests			
--	---------------------	--	--	--

#### Treatments

	No Treatment Prescriptions			
--	----------------------------	--	--	--

#### Diet History

	No Diet Records			
--	-----------------	--	--	--

#### Medical Conditions

	No Medical Conditions			
--	-----------------------	--	--	--

[Home](#)



I can also click Medical History (slide 27) on the animal's profile page, and this screen shows that consolidates all types of activity for the animal.

## iShelter → Animal Profile

### [Recent Dates](#)

Check-In : 2020-08-10

Adoption :

Release :

Stay : 86 day(s)

Input : 2020-08-11

### [Financial Information](#)

Adoption: 0.00

Sponsored: 0.00

Expenses: 0.00

Medical: 0.00

### [Keep Together](#)

No Animals

### [Litter Information](#)

Siblings: 0

Litters: 0

### [Medical Alerts](#)

None

Active :

Status : -- Please Select --

Gender : Male

Primary Color : Tobiano

Secondary Color : -- Please Select --

Eye Color : -- Please Select --

Microchip Type : -- Please Select --

Microchip # :

Tag # :

Estimated Birthday/Age? : ☐

Birthday : 2015-05-08

Age : 5 years 5 months 26 days

Spayed/Neutered : ☐ 

Date of Death :

Death Reason : -- Please Select --

Maddie's Fund Euthensia Status : -- Please Select --

Shelter Animals Count Status : -- Please Select --

Sui




This is the same screen – I have scrolled down to the next section. Highlights on this page are that I was able to add Tobiano to the Primary Color table, as well as add microchip or another tag number. It also continues some important display information along the left.



## iShelter → Animal Profile

General Comments :	<div></div>	<b>Behaviors :</b> <input type="checkbox"/> Fearful <input type="checkbox"/> Good with other animals <input type="checkbox"/> Poor ground manners <input type="checkbox"/> Social <input type="checkbox"/> Very spooky <b>Attributes :</b> <input type="checkbox"/> Declawed <input type="checkbox"/> House Trained <input type="checkbox"/> Special Needs <input type="checkbox"/> Tattoo
Hidden Comments :	<div></div>	
Distinctive Features :	<div></div>	
Short Biography :	<div></div>	
Long Biography :	<div></div>	



The large Comments fields, and the Behaviors and Attributes fields, are the final two sections on an animal's profile. I was able to add the behaviors of "Poor ground manners" and "Very spooky". I was unable to delete "Fearful" but it could be because that was already selected on a profile.

Animals

People

Shelter

Office

Reports

Help

W4Sight

adminShelter Logout

Update/View Profile

-- Lists --

Profile Forms

Profile Type

☒ Person
 ☐ Business

Communication

No Email

Contact Card

Recent Dates

Brought :  
 Adopted :  
 Donated :  
 Received :

Financial Information

Donated: 0.00  
 Membership: 0.00  
 Adopted: 0.00

Roles

No Roles

Relationships

No Relationships

Animal Adoptions

No Adoptions

First Name : Katinka

Middle Name :

Last Name : Ødegaard

Nickname :

Additional Names :

Type :
 ☐ Adopter
 ☐ Donor
 ☐ Employee
 ☒ Farrier
 ☐ Requests Service
 ☐ Veterinarian
 ☐ Volunteer

Gender : -- Please Select --

Housing Status : -- Please Select --

House Inspection Status : -- Please Select --

Date of Last Inspection :

ID Type : -- Please Select --

ID Number :

Heard About Us From : -- Please Select --

Submit

I have added our same Norwegian farrier as a person. Note that I was able to add specific person types of Farrier and Veterinarian. In order to attach the person to a medical procedure however, he or she needs to be set up as a user in the system with a specific permission checkbox marked. Without that, you cannot link the person performing the procedure to the animal or procedure itself.

iShelter → Person Profile

Home Phone :

Work Phone :

Cell Phone :

Primary Email :

Secondary Email :

Address :

:

City :

Region :

Postal Code :

Country :

Banned :

Birthday :


Anniversary :

General Comments :

Hidden Comments :

Housing Comments :

Banned Comments :



Again, these are two side-by-side screen shots but they actually appear as you scroll through the person profile.

## iShelter → Medical Treatment

**Update/View Animal**

-- Lists --

Profile Forms



Close this Box/Frame to return to editing the profile X

Audit Page



Record(s) successfully added

#	Date Given	Date Needed	Overdue	Comments	Vaccine
1		2021-03-07			Rhino Trachitis/Feline Calicivirus
2		2021-04-07			6 in 1
3		2021-04-07			West Nile

[Current/Last Location](#)

[Cattle run](#)

[Current/Last Health Stats](#)

[Weight](#)

Name :

Aliases :

Species :



**Petstablished**



**PETSTABLISHED** <sup>TM</sup>



## Petstablished → Animal Profile

The screenshot shows the 'Edit Pet' interface in the Petstablished system. The top navigation bar includes a menu icon, the path 'Pets / Hope', and a 'Disable Help' link. Below this, a series of tabs allows navigation between different sections of the pet's profile: Primary Information, Pet Images, Pet Video, Physical Characteristics, Characteristics, Gets Along with, Additional Information, License Information, Microchips, Internal Pet Documents, Custom Fields, and Cage History. The 'Primary Information' tab is currently active.

On the left side, there is a sidebar with the following elements: a profile picture placeholder, the text 'PS Animal Rescue' and 'Tricia Petestablished Staff', buttons for 'Staff' and 'Petlover', a 'Tutorials & FAQ' link with a 'NEW!' badge, and a list of navigation items: 'Dashboard', 'Cathy's Wholesale Shop', 'My Pets', 'My Applications', 'My Organization', and 'Microchips'.

The main content area is titled 'Edit Pet' and includes a 'Save changes' button. Below the title, there are several action buttons: 'Back', 'View Pet's Activity Log', 'View Medical Records', 'Assign Adopter', 'Assign Foster Parent', and another 'Save changes' button. The 'Primary Information' section contains the following fields:

- \* Name:** A text input field containing the name 'Hope'.
- \* Status:** A dropdown menu currently set to 'Available', with a link to 'Learn More About Statuses'.
- Primary Breed:** A dropdown menu set to 'Appaloosa'.
- Secondary Breed:** A dropdown menu with the text '(clear)' and 'choose option'.
- Is Mix?:** A checkbox that is currently unchecked.

At the bottom of the form, there is a sharing notification: 'meet.google.com is sharing your screen.' with 'Stop sharing' and 'Hide' buttons. The URL bar at the very bottom shows 'https://www.petestablished.com/awo/pets/839260/medical\_records'.

- This is a screen shot that I grabbed during the demo. I don't have a main login screen, but you can see a lot of the navigation on the left, and along the top.

## Petstablished → Animal Profile

### Additional Information

Internal ID ⓘ

Internal ID

Animal Control ID ⓘ

Adoption Fee \* will show on pet's public page

choose or create option

ⓘ Add/Remove Auto-Complete Dropdown Options Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Events Attendance ⓘ

choose or create option

ⓘ Add/Remove Auto-Complete Dropdown Options Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Internal Notes ⓘ

Behavioral Tracking Notes

Behavioral Tracking Notes

Coordinators ⓘ

Coordinators



- This is a screen shot sent to me by the vendor of an animal profile.

## Petstablished → Animal Profile

### Microchips

You are able to assign a microchip number to the pet by clicking Add Microchip below. Please make sure the chip is 9, 10, or 15 digits. The pet's microchip number will be searchable in the search bar at the top of the Manage Pet Data section of your account. You can also update the pet's assigned to each chip by going to the Microchips Registry section of your account.

Add Microchip

### Internal Pet Documents

Any document uploaded here will be visible within this pet's edit page and in the Documents section of your account. When you assign and adopter or foster for this pet, you will be able to choose whether or not you want these files to show up in the owner's account (if they choose to create a Petstablished account).

Drop files to upload

or

Browse



- Not much to say here but it is nice that documents can be uploaded



## Petstablished → Animal Profile

**Custom Fields and Behavior Tracking**

This section allows you to add custom fields for all pet types. Doing this will allow you to create fields track pet behavior qualities and other information that may not already be listed on the pet edit page. If you add a custom field to a pet type, it will be added as an option to fill in for all pets of that type (I.E. If I add the custom field "Pet is good with kids under 3 years old" for a dog, this custom field, along with the possible value selections you enter for the field, will be added on all other dogs' edit pages).

[Manage Custom Fields](#) [Tutorial](#)

---

**Physical Characteristics**

Size:

Age:

Primary Color:

Secondary Color:

Tertiary Color:

- Custom Fields are where you – or the company – would be able to add equine-specific information. Some can be done by users, but some would need to be created by the vendor. Even so, it sounded as if not all fields could be created. Since I was on the phone with a sales rep and not a software developer, she did not always know for sure if a specific field could be created or not.
- I feel fairly confident saying that drop-down values were not an issue, so you could add the many shades of “brown” to a color field. But you may not always be able to add a completely new field.

## Petstablished → Animal Profile

Date Pet Entered Your Care (MM/DD/YYYY) ⓘ

10/30/2020

Time of Intake

i.e. 12pm

Type of Intake

Other

Where was pet originally found? ⓘ

Current Location ⓘ Tutorial

Manage Dropdown Options ⓘ

choose or create option

Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item

Previous Owner Information or Location ⓘ Tutorial

Manage Dropdown Options ⓘ

Select Owner from Contacts

choose or create option

Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Acquired By ⓘ Tutorial

Manage Dropdown Options ⓘ

choose or create option

Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item for this field

Current Location ZIP Code ⓘ Tutorial

Manage Dropdown Options ⓘ

12345

Please make sure to hit the ENTER key or click on Add option to save the value as a drop down menu item



- Important Intake information.

## Petstablished → People Profile

The screenshot shows the 'People Profile' page in the Petstablished system. The page is titled 'Contact Information' and displays details for a contact named Michael Amabile. The interface includes a purple header with navigation links and a sidebar on the left with a logo and menu items. The profile data is organized into two columns.

Contact Information	
<b>First Name</b> Michael	<b>Last Name</b> Amabile
<b>Email</b> maan5555_gmail.com@petstablished.com	<b>Home Phone</b> 2019185791
<b>Gender</b> Male	<b>Contact Type</b> Adopter, Donor
<b>Address</b> 74 Baldwin Ave. BSMT Apt., BSMT Apt., Jersey City, NJ, 07306-2002	
<b>Work Phone</b> 2019185791	<b>Cell Phone</b> 2015265759
<b>Contact Staff Member</b> Do Not Email	<b>Birthdate</b> May 06, 1966
	<b>Do Not Send Regular Mail</b>

- This does give you a little bit better overview of what the user interface looks like. You can see navigation along the top and the left, for example.

## Petstablished → Medical History

The screenshot displays the Petstablished Medical Records interface. The left sidebar contains navigation links: Dashboard, Cathy's Wholesale Shop, My Pets, My Applications, My Organization, Microships, Organization Settings, User Settings, Tags & Dropdowns, Message Us, and Logout. The main content area is titled 'Medical Records' and shows a list of medical entries for a cat named Cathy. The entries are filtered by 'Record Type' and show a date of visit on October 30, 2020. The entries include a 'Wellness/Vaccines - Other' entry with a name of 'EPM Test', and three 'Wellness/Vaccines - Vaccines Given' entries with vaccine names: 'Rabies Vaccine', 'Rhino', and 'EIV/EHV/EVE'.

Medical Records

Filter by:  From:  To:  Entries Per Page:  Page 1 of 1

Date of visit: October 30, 2020

Veterinarian Information: Ashley Ashcraft, 5018442969

Description: Wellness Check

Medical Record Entries for this Visit

- Wellness/Vaccines - Other  
Name: EPM Test
- Wellness/Vaccines - Vaccines Given  
Vaccine name: EIV/EHV/EVE
- Wellness/Vaccines - Vaccines Given  
Vaccine name: Rabies Vaccine
- Wellness/Vaccines - Vaccines Given  
Vaccine name: Rhino

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## Rescue Connection



## Rescue Connection → Animal Profile

**Animal Profile: Alma #14-059 (Female Paint Horse: Paint/Pinto)**

**At a Glance / Basics / Attributes**

**Animal At a Glance:**

- Female, unaltered
- Latest open intake date: 08/07/2014 (available 08/12/2014)
- Current status: Adoptable (adoptable will be shown in public adoptable listings after stray period is up)
- Animal is available for adoption or other outcome
- Current location: Shelter: Habitat for horses
- To convert this animal to a non-shelter animal, go to the BASICS area.
- Print Animal Card
- More information (if a duplicate has been entered)
- Basic Web page URL, links code, and OR code (selectable animals only)

**Animal History:**

- Basic Medical History Report
- Flow Status Changes
- Flow Income and Expenses
- Flowable: Flow Assignments
- Flow Medical History
- Flowing: Flow Medical History Report

**Change Status:**

New Status?  **Save**

**Print Documents:**

☐ General Animal Summary

**Print Now**

**Basics:**

Animal Details:

Name	Alma
Shelter animal	
ID no.	14-059
Species	Horse
Breed(s)	Paint/Pinto (painted)
Gender	Female
Current status	Adoptable (ADOPTABLE)
Altered	No
Date of spay/neuter	N/A
Reference no.	911001001272236
Display	Horses
Warnings	No warnings
Dates of birth and death	DOB: 01/01/2005
Age	15 years (DOB: 1/1/2005)
Age notes	
Featured?	No
Short description (if featured)	
Known issues	Came in with Licea, Track, Yuma and Burley.

3-1-2 screens 276, basic details while animal is not a user's current animal.

**Callouts:**

- All data related to the animal can be found under each of these tabs, and the tabs and content can be customized by user.
- This icon lets you access the last 25 screens you've visited; the star icon lets you add any screen to your personal favorites.
- This section includes basic animal details and gives you the ability to merge (combine) duplicate animals or quick-print a kennel card.
- Here you can print animal-specific reports, including medical history, to anyone.
- Your custom documents are shown here and you can print one or more by checking boxes and pressing PRINT NOW.

- I have somewhat limited information on Rescue Connection because most of our work was done via email. My contact – Coral – very thoroughly reviewed our requirements list and sent some annotated screen shots. Remember that these slides will be sent to you as PDF so you will be able to zoom in and see this better.

## Rescue Connection → Person Profile

Any expiring items will show here. You can also add your own warnings for a particular person (e.g., "hostile to law enforcement") to be shown.

Current contact info is listed, as are all recent correspondence (mail or email) and open or pending items: unpaid balances, pending adoptions, and so on. You can also see a list of animals at this location.

ANDREW GORDON • MAIN VIEW: AT A GLANCE | BASICS

Person at a Glance

Note: You can view and print this person's complete history from the History/Journal area.

**Andrew Gordon**

- Add to my personal contacts
- Contact to resolve disputes
- This person does not have a public user account. Add
- Donation history: View, Print

**Current Contact Information**

**Current phone numbers:**

- Home: 800-795-9336

**Current e-mail address:**

- Home: jacob.gordon@gmail.com

**Current address:**

- Home: 3717 148th St SW Apt 8203, Lynnwood, WA 98087

**Find information**

This profile aids the person/company search to find the person or company with whom you want to merge the current record. Note that when you select a person or company from the search results list, (a) the selected person/company is deleted and their information is transferred to the current record, and (b) the merge/modification process happens automatically upon selection with no confirmation.

- Find person at company

**Recent Correspondence**

No correspondence sent in the last 6 months

**Correspondence Records**

Note: The only records of past use are displayed; there may be additional records, which you can view, going to the person's record page.

**Animals at this location:**

- Zuni #33230, Male Cat

**Licenses expiring:**

**Basics**

Identify, verify, and record records and check this person

Correspondence and license renewals: Active - OK to send [More info](#)

Warnings: No warnings

Nickname: No ID number

ID number: Unknown or N/A

Social Security No.:

Date of birth:

Is a senior citizen: No

Is a disabled person: No

Is an off-site or temporary adoption location for shelter animals: No

- Is OK to receive mailings
- Is OK to receive e-mails
- Is OK to receive phone calls

This person does not have a public user account.

Web address:

**Roles and Contact Types**

Mailing list name/member: Active  
Effective: 07/15/2014

**Attributes**

No attributes

Like the animals area, all data for a person or company is contained in these tabbed areas, and the tabs can be customized by user or by access class.

All of this data and hundreds of other criteria are included in our SUPER SEARCH program - you can even look people up based on activities within a date range.

Attributes and roles/contact types are user-definable, searchable, and unlimited. You can even create mail or email distribution lists using attributes or roles.



## Rescue Connection → Vaccinations

**Vaccinations/Treatments**

Filter by drug: All

To print a merge document, select a document from this list, then use the supplied links in the records header.

**ADMINISTERED ON 10/25/2019 AT 9:47 AM**

Vaccination: Rabies (Rabies), T - N/A  
Lot #: 20081A  
Control #: (nothing entered)  
Assigned to: N/A  
Expiration: 10/24/2022  
Receipt cannot be added (no fee items)  
View info

**ADMINISTERED ON 10/26/2019 AT 11:00 AM** **OPENED**

Vaccination: Rabies (Rabies), T Application  
Lot #: (nothing entered)  
Control #: (nothing entered)  
Assigned to: Other veterinarian  
Expiration: 10/24/2023  
Receipt cannot be added (no fee items)  
View info

**ADMINISTERED ON 10/12/2017 AT 11:00 AM** **OPENED**

Vaccination: PRNP (Prion), T Application  
Lot #: (nothing entered)  
Control #: (nothing entered)  
Assigned to: Other veterinarian  
Expiration: 10/12/2020  
Receipt cannot be added (no fee items)  
View info

**Medications**

Filter by drug: All

**CERENIA 16MG TABLETS (T) TABS - COMPLETE**

Single dose administered on 8/2/2020 at 9:10 AM  
Scheduled time: 09:10 AM  
Dose given: 8/2/2020 at 9:10 AM by Jody Eggett  
Assigned to: No specific veterinarian  
View info and schedule

**TRAMICOLONE 3.5MG TABLETS (T) TABS - COMPLETE**

Single dose administered on 8/17/2020 at 5:45 PM  
Scheduled time: 05:45 PM  
Dose given: 8/17/2020 at 5:45 PM by Tasha "Tia" Kitchens  
Assigned to: Tasha "Tia" Kitchens  
Approved by: Lisa Thompson, DVM DAB (11/20/2020 10:45 PM)  
View info and schedule

**LYVENE (L) 3 MG - COMPLETE**

Single dose administered on 8/5/2020 at 11:00 AM  
Scheduled time: 11:00 AM  
Dose given: 8/5/2020 at 11:00 AM by Kathy L. Hudge  
Assigned to: No specific veterinarian  
View info and schedule

**CERENIA 16MG TABLETS (T) TABS - COMPLETE**

Single dose administered on 7/21/2020 at 10:29 AM  
Scheduled time: 10:29 AM  
Dose given: 7/21/2020 at 10:29 AM by Katelyn Whitham  
Assigned to: No specific veterinarian  
View info and schedule

**Callout Boxes:**

- Vaccinations can be due (scheduled), administered, or both. Due vaccinations will appear in the shelter calendar, as well as up to three revaccinations/boosters. Veterinarians or staff can be assigned to administer vaccinations, and vendors can be auto-added with each record.
- If a vaccination has an expiration date, the system will let you know. Additionally, all vaccinations and medications (drugs) can be tracked using ShelterTrack's inventory system, with orders, receiving, and multiple inventory locations. Drug usage and controlled substance are always logged so you can see what you've administered or lost due to shrinkage and what's left in inventory.
- Medications can be scheduled (daily, weekly, or over a period of days or weeks or months) with up to 9 doses a day. Scheduled items appear in the shelter calendar.
- Complete schedule and dose history can be viewed here. You can also mark as done as having been administered.





## Key differences

	Shelter Manager	Barn Manager	iShelters	Petstablished	Rescue Connection
Cost	●	●	●	●	●
Intake Volume	●	●	●	●	●
Staff Needs	●	●	●	●	?
PetFinder integration	●	●	●	●	●
Adoption Activity	●	●	●	●	●
Law Enforcement Engagement	●	●	●	●	●



- Again – here are our key differences. Now that we have quickly reviewed them all, how should you assess this slide?
- Cost – My general rule was:
  - \$0 - \$499 is green
  - \$500 - \$999 is yellow
  - \$1000+ is red
- If intake volume is low AND/OR the software seemed as if it would easily handle intake information, it has a green dot. The only reason that Barn Manager's is yellow is that it is designed to manage barns, and may lack the ability to record all of the intake information you will need as a rescue operation.
- Staff needs refers to the amount of time staff may need to spend setting up and configuring the system, learning how to use it, and doing ongoing maintenance. If something allows for a lot of configuration, that does mean someone needs to be strategic about setting up processes. It was difficult to evaluate Rescue Connection because I was never able to see a demo.
- If the software integrates with a lot of pet finder services, they are green. If they are

yellow, it just means that they automatically integrate with a few very specific services. Red means there is no integration.

- If the software will handle adoption activity relatively efficiently, they are green. Those that require some workarounds or seemed to require a lot of clicking and moving around received a yellow.
- If you are heavily involved in law enforcement work, Rescue Connection is the best option out of the systems we reviewed. Shelter Manager and iShelters do have the ability to track this, but it is more limited. Petstablished may technically fall in to the yellow category instead of red, but I was unable to evaluate this fully.

## Customer Support

### Shelter Manager

- Online manual, training videos, and FAQs all online
- Specific requests are handled via email, Keep in mind that Shelter Manager is based in England so getting immediate support may be difficult

### Barn Manager

- Product documentation and how-to videos
- Online customer support 8am – 8pm EST, Tuesday - Saturday

### iShelter

- "Full phone and email support." Specific response time and hours are unclear.
- PDF User Manuals are available for download for both iShelter and adminShelter

### Petstablished

- Tutorials and FAQs available online, as well as lots of tooltips and contextual help.
- Developers seem very accessible and willing to add custom fields where needed.

### Rescue Connection

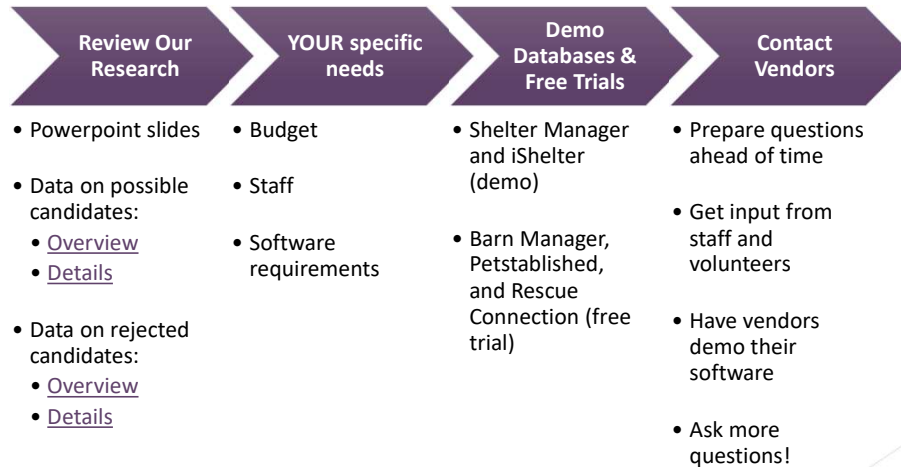
- User manual and program index are provided. Website also lists "unlimited support" but unclear if it is phone / email / chat / etc.



The customer support listed above is included for all systems at no additional cost. I don't believe there were higher levels of support available for a fee.

Note that all offer a free online test system, or free trials that vary in length.

## What's Next?



Powerpoint slides will be made available in a PDF version after the webinar. All of the links have been tested and should work.

As we reviewed and evaluated software, we documented key points in Airtable which is a cloud-based collaboration application. The Overview link will take you to a read-only summary view of possible candidates comparing key features. Some are candidates that we did not include in this presentation, so definitely see if one of those might meet your needs. We have also provided the full set of information in the “details” link.

Software that we considered did not find to be a suitable fit can be found in the “rejected candidates” links.

## Vendor Contact Info

Software	Contact Person	Email	Website
Shelter Manager	Rob	info@sheltermanager.com	<a href="http://www.sheltermanager.com">www.sheltermanager.com</a>
Barn Manager	Nicole Larkin	Nicole@barnmanager.com	<a href="http://www.barnmanager.com">www.barnmanager.com</a>
iShelter	Carrie Gerendasy	carriedasy@comcast.net	<a href="http://www.ishelters.com">www.ishelters.com</a>
Petstablished	Tricia Wagga	tricia@petstablished.com	<a href="http://www.petstablished.com">www.petstablished.com</a>
Rescue Connection	Coral Amende	rescueconnectionsoftware@gmail.com	<a href="http://www.rescueconnectionsoftware.com">www.rescueconnectionsoftware.com</a>



- Note I barely spoke with Rob at Shelter Manager. I only asked a couple of clarifying questions, since the demo database was so functional
- I also interacted very little to Carrie with iShelter, again because of the online demo database that allowed me to test anything.
- I did demos with Nicole (Barn Manager) and Tricia (Petstablished).
- Coral took the entire list of requirements and annotated it very thoroughly! We never did manage to talk directly, but she has always been responsive.



Questions?