|  |  |
| --- | --- |
|  | Shelterly Quick ReferenceSearch |

**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)”.