



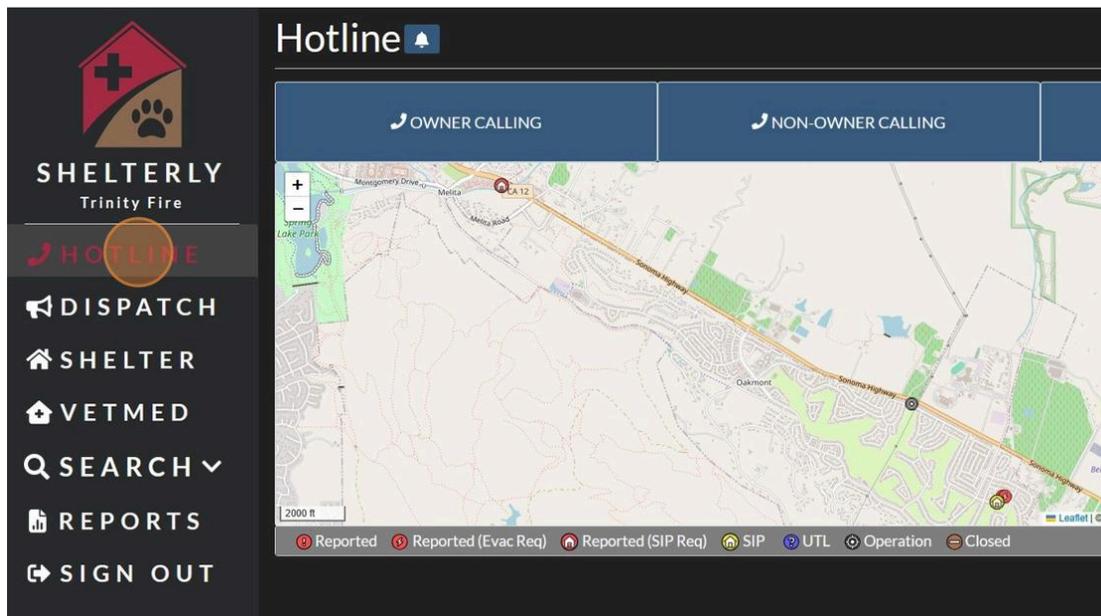
## Release v0.8.5 Notes 06/09/25

### Operational Service Requests Refinement

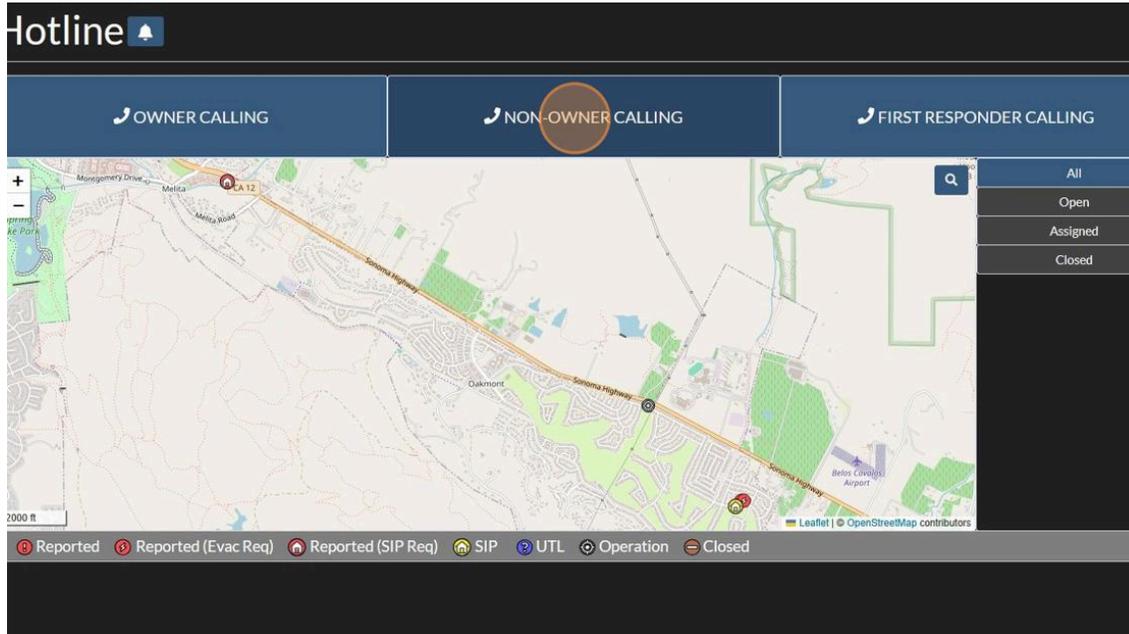
We've refined Operational SRs to better support fieldwork to help structure and document tasks like trapping, trail cam placement, and logistics coordination. SRs can now have 0 animals assigned to them to ensure accuracy.

This change also makes it easier for teams to plan and manage day-to-day work (like TNR or monitoring known animal locations) while maintaining accurate records and coordination across agencies.

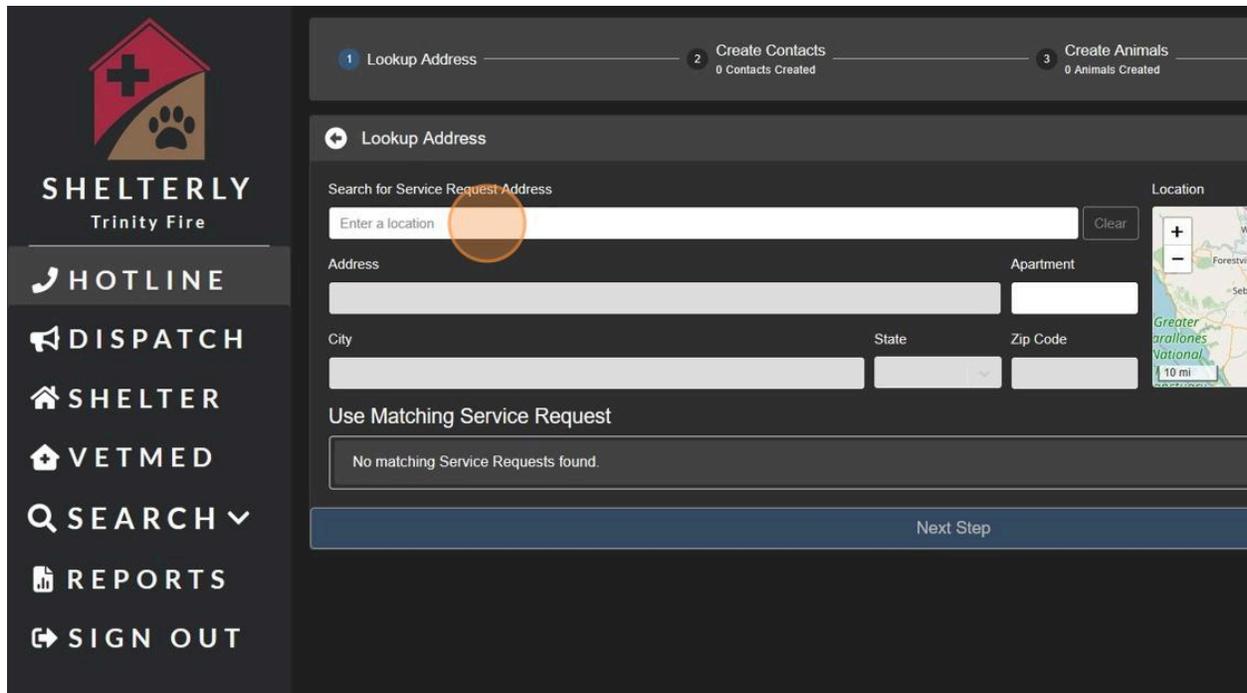
1. Click "Shelterly — Hotline"



## 2. Select "NON-OWNER CALLING"



## 3. Click "Enter a location" to Search for Service Request Address



#### 4. Type in Service Request Address

The screenshot shows the 'SHelterly Trinity Fire' interface. On the left is a navigation menu with options: HOTLINE, DISPATCH, SHELTER, VETMED, SEARCH, REPORTS, and SIGN OUT. The main area is titled 'Lookup Address' and includes a progress bar with three steps: 1. Lookup Address, 2. Create Contacts (0 Contacts Created), and 3. Create Animals (0 Animals Created). Below the progress bar, there's a search bar with the text '1125 oak leaf' and a 'Clear' button. A dropdown menu lists five address suggestions in Santa Rosa, CA, USA. To the right is a map showing the location. Below the suggestions is a section 'Use Matching Service Request' with the text 'No matching Service Requests found.' and a blue 'Next Step' button.

#### 5. Click "Next Step"

This screenshot shows the 'SHelterly Trinity Fire' interface at a later stage. The progress bar now has four steps: 1. Lookup Address, 2. Create Contacts (0 Contacts Created), 3. Create Animals (0 Animals Created), and 4. Create Service Request. The search bar now contains the full address '1125 Oak Leaf Circle, Santa Rosa, CA, USA'. Below the search bar, there are input fields for 'Address' (Oak Leaf Circle), 'Apartment', 'City' (Santa Rosa), 'State' (CA), and 'Zip Code' (95409). The 'Use Matching Service Request' section still shows 'No matching Service Requests found.' The 'Next Step' button is now highlighted with a red circle.

6. Use Search for Existing Reporter. If none, type in Reporter Information

The screenshot shows the Shelterly interface for Trinity Fire. The top navigation bar includes a logo and three progress steps: 'Lookup Address' (checked), 'Create Contacts' (0 Contacts Created), and 'Create Animals' (0 Animals Created). The left sidebar contains menu items: HOTLINE, DISPATCH, SHELTER, VETMED, SEARCH, REPORTS, and SIGN OUT. The main content area is titled 'Reporter Information' and includes a search field for existing reporters. Below this are input fields for First Name\*, Last Name\*, Phone\*, Alternate Phone, and Email. A large text area is provided for 'Comments / Alternate Contact'. At the bottom, the 'Add Owner' button is highlighted with an orange circle.

7. Click "Next Step"

This screenshot shows the same Shelterly interface, but the progress bar now includes a fourth step: 'Create Service Request' (0 Service Requests Created). The 'Reporter Information' form is populated with the following data: First Name: Joe, Last Name: Smith, Phone: 1111111111. The 'Next Step' button at the bottom right is highlighted with an orange circle.

8. No. of Animals is 0 listed by default.

The screenshot shows a web form with a dark sidebar on the left containing navigation links: 'SEARCH', 'REPORTS', and 'SIGN OUT'. The main form area has a dark background with white text and input fields. At the top, there are three dropdown menus labeled 'Aggressive', 'ACO Required', and 'Confined', all set to 'Unknown'. Below these are two large text input areas for 'Animal Notes' and 'Medical Notes'. Further down are input fields for 'Last Seen', 'Microchip Number', and 'No. of Animals'. The 'No. of Animals' field contains the number '0' and is circled in red. At the bottom of the form, there is a blue button labeled 'Add Another'.

9. Click "Next Step"

This screenshot shows the same web form as above, but with additional dropdown menus at the top: 'Secondary Color' (set to 'Select a species...'), 'Requested Service' (set to 'Reported'), 'Sex' (set to 'Select...'), 'Age' (set to 'Select...'), and 'Fixed' (set to 'Unknown'). Below these are two more dropdown menus labeled 'Aggressive' and 'Injured', both set to 'Unknown'. The 'No. of Animals' field now contains the number '1'. At the bottom of the form, there are two blue buttons: 'Add Another' and 'Next Step'. The 'Next Step' button is circled in red.

10. Enter instructions for Field Teams for the Operational SR, ensure priority is set appropriately along with the SR Followup Date.

SHELTERLY  
Trinity Fire

HOTLINE  
DISPATCH  
SHELTER  
VETMED  
SEARCH  
REPORTS  
SIGN OUT

Service Request Information

Service Request Address: Oak Leaf Circle, Santa Rosa, CA  
Refine Exact Lat/Lon Point

Map showing location on Oak Leaf Circle, Santa Rosa, CA.

Priority: High

Service Request Followup Date: June 9, 2025

Instructions for Field Team

Verbal Liability Release  Key at Staging  Accessible  Turn Around

Finish and Create Service Request

11. Click "Finish and Create Service Request"

SHELTERLY  
Trinity Fire

HOTLINE  
DISPATCH  
SHELTER  
VETMED  
SEARCH  
REPORTS  
SIGN OUT

Service Request Information

Service Request Address: Oak Leaf Circle, Santa Rosa, CA  
Refine Exact Lat/Lon Point

Map showing location on Oak Leaf Circle, Santa Rosa, CA.

Priority: High

Service Request Followup Date: June 9, 2025

Instructions for Field Team

Drop off food at this location for ACOs to pick up and distribute

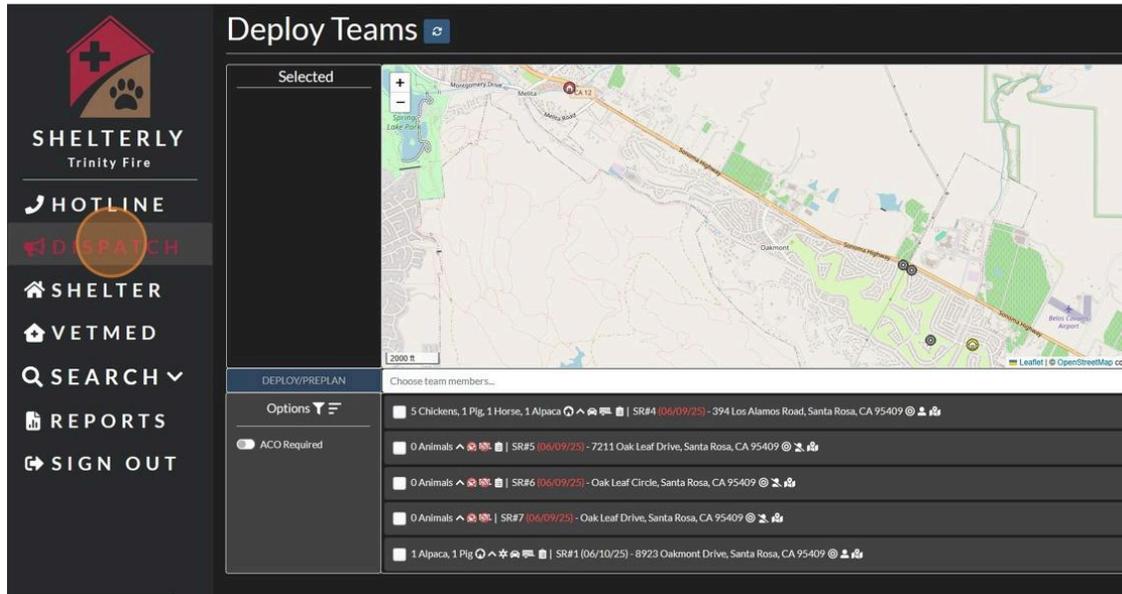
Verbal Liability Release  Key at Staging  Accessible  Turn Around

Finish and Create Service Request

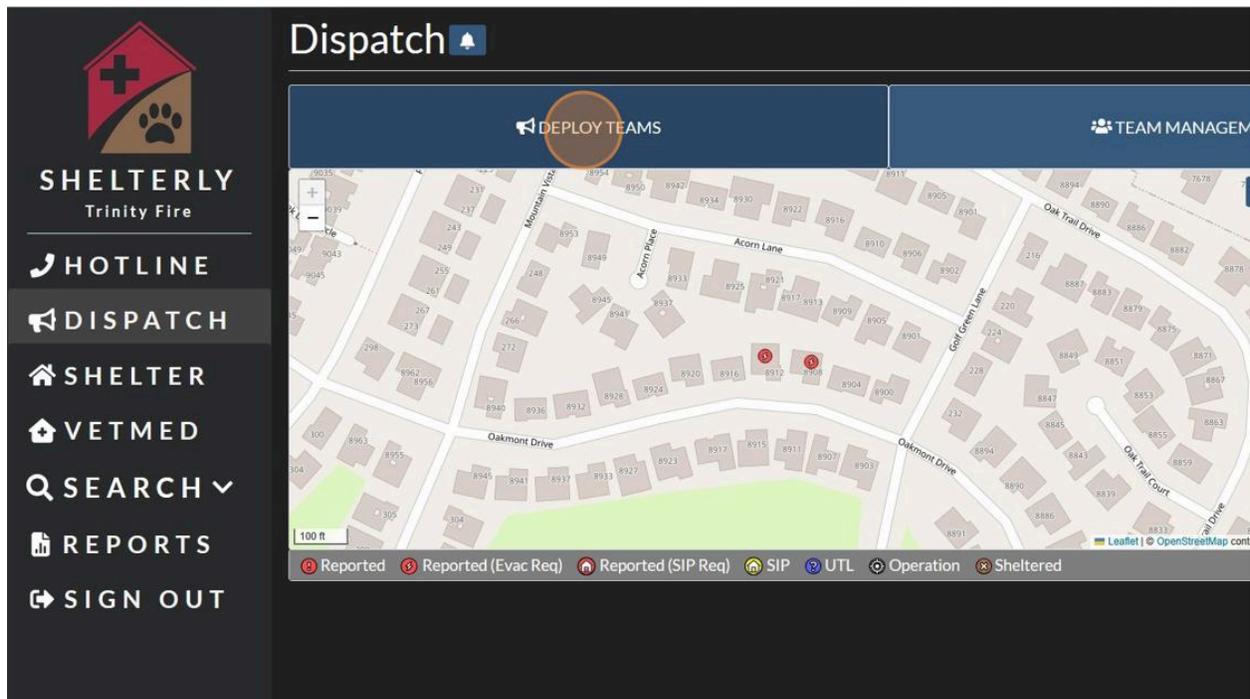
## Dispatch Workflow: Deploy Teams

We've refined our dispatch workflow to include filter and sort options, and how to add team members.

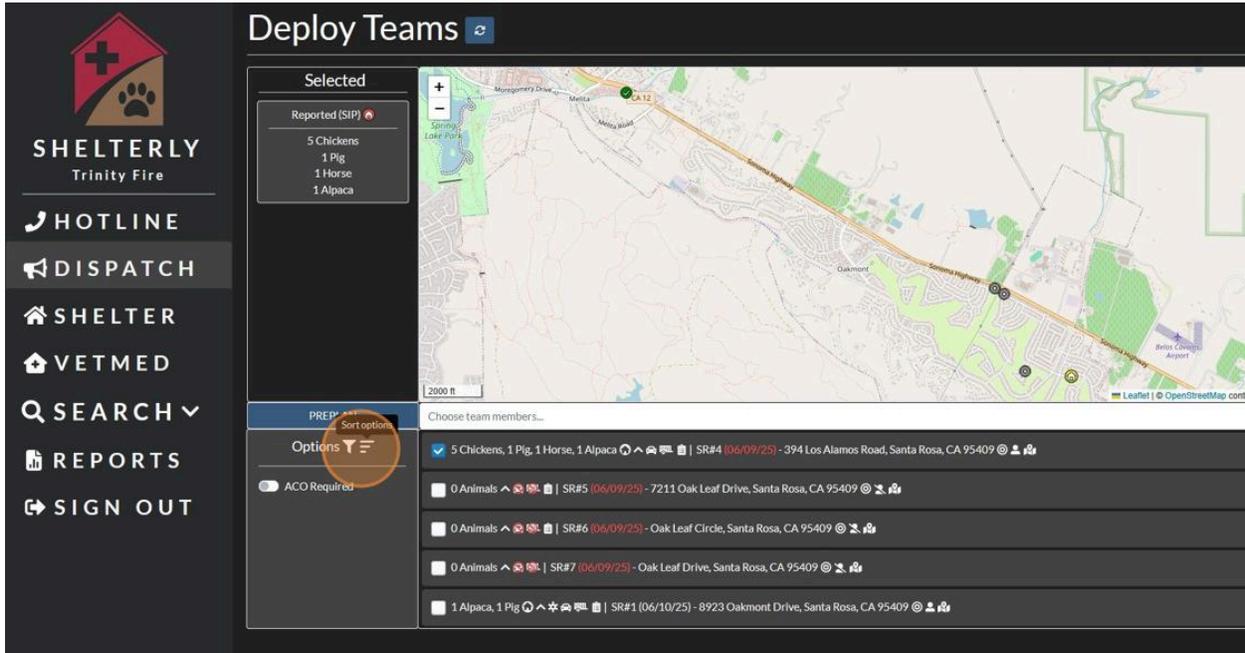
1. Select "DISPATCH"



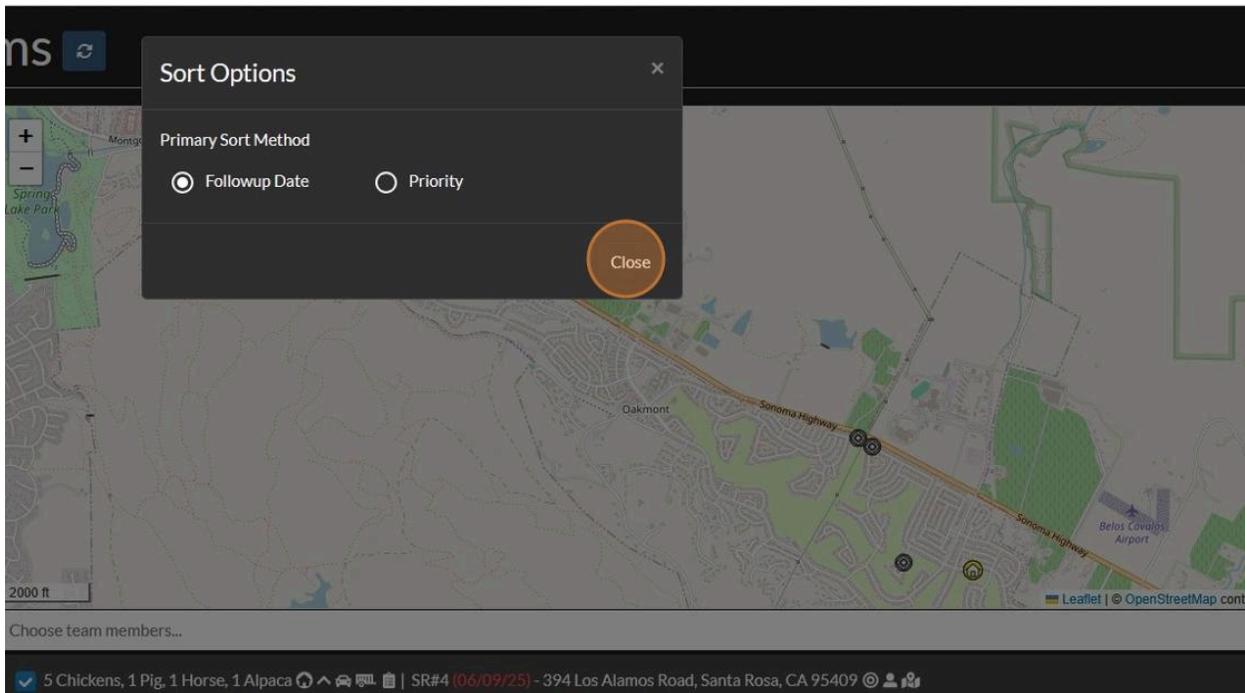
2. Click "DEPLOY TEAMS"



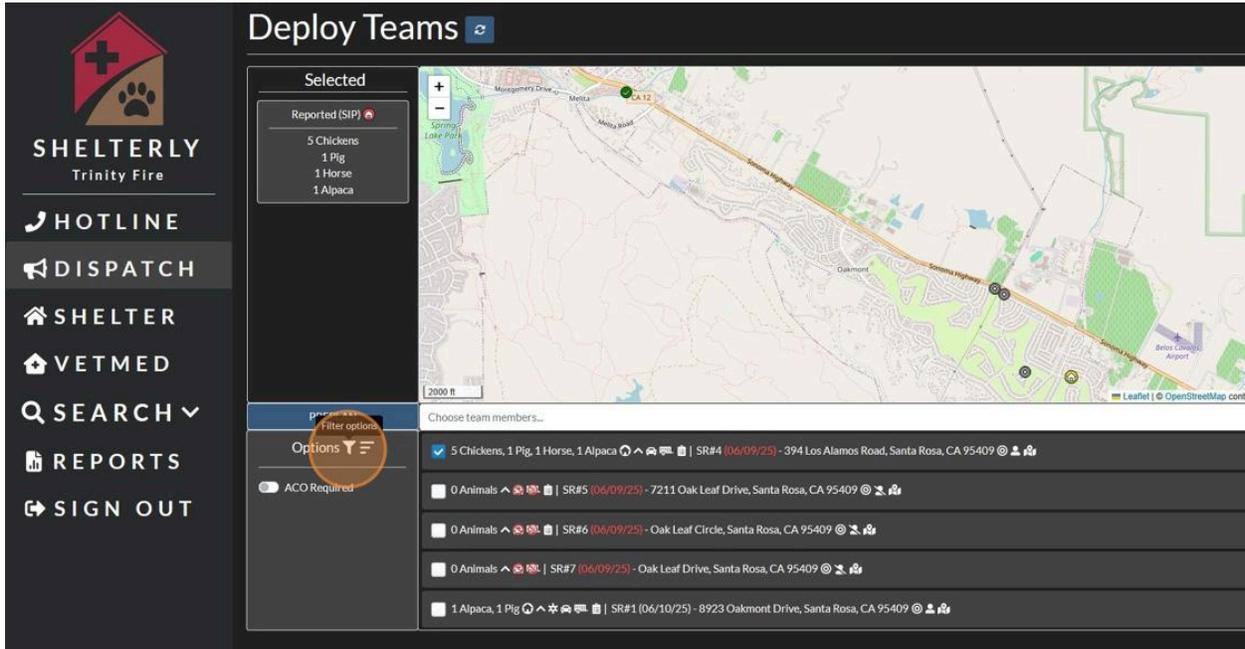
3. To sort, click "Sort Option"



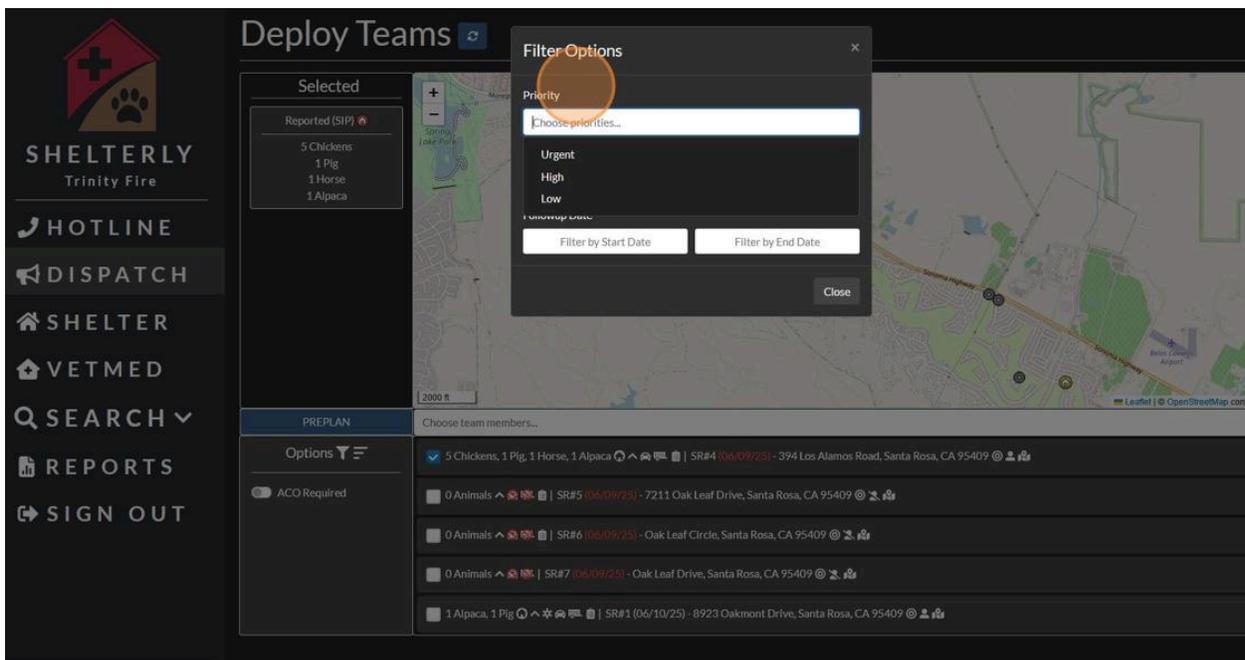
4. Sort Options include Primary Sort Method for Followup Date or Priority. Select one and click "Close". (Default is Followup Date)



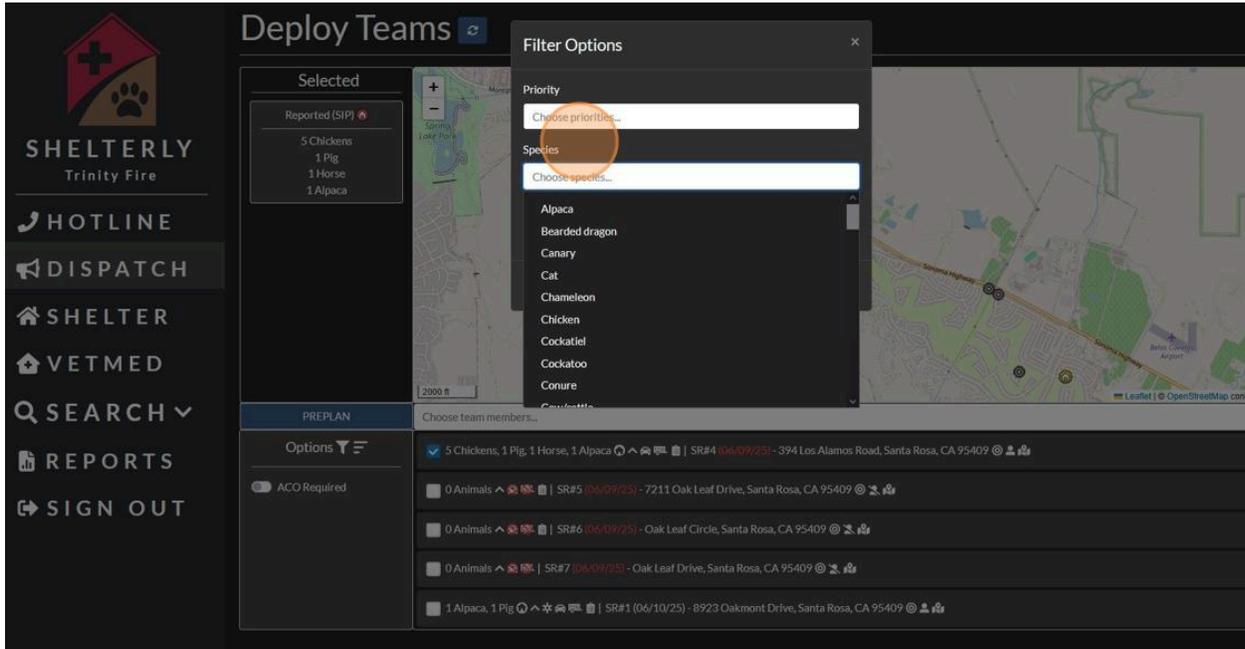
5. To Filter by Priority, Species and/or Followup Date Start and End, click "Filter Options".



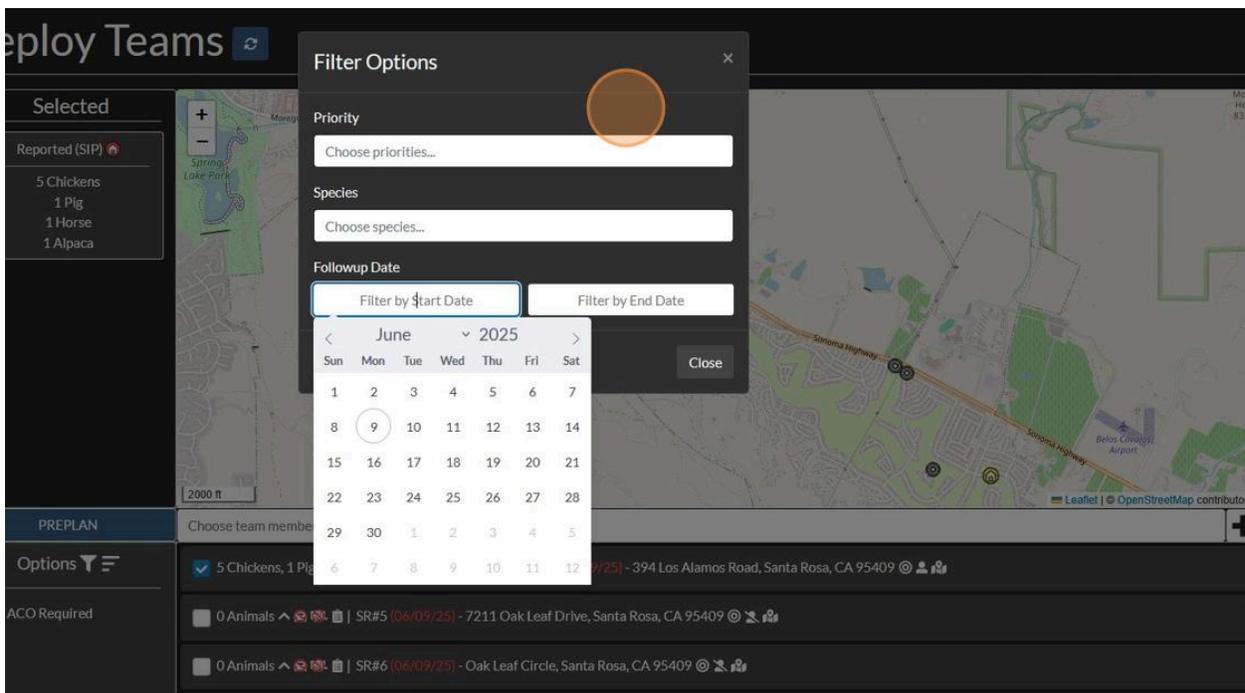
6. To filter by priority, Click "Priority" and select Urgent, High or Low priorities.



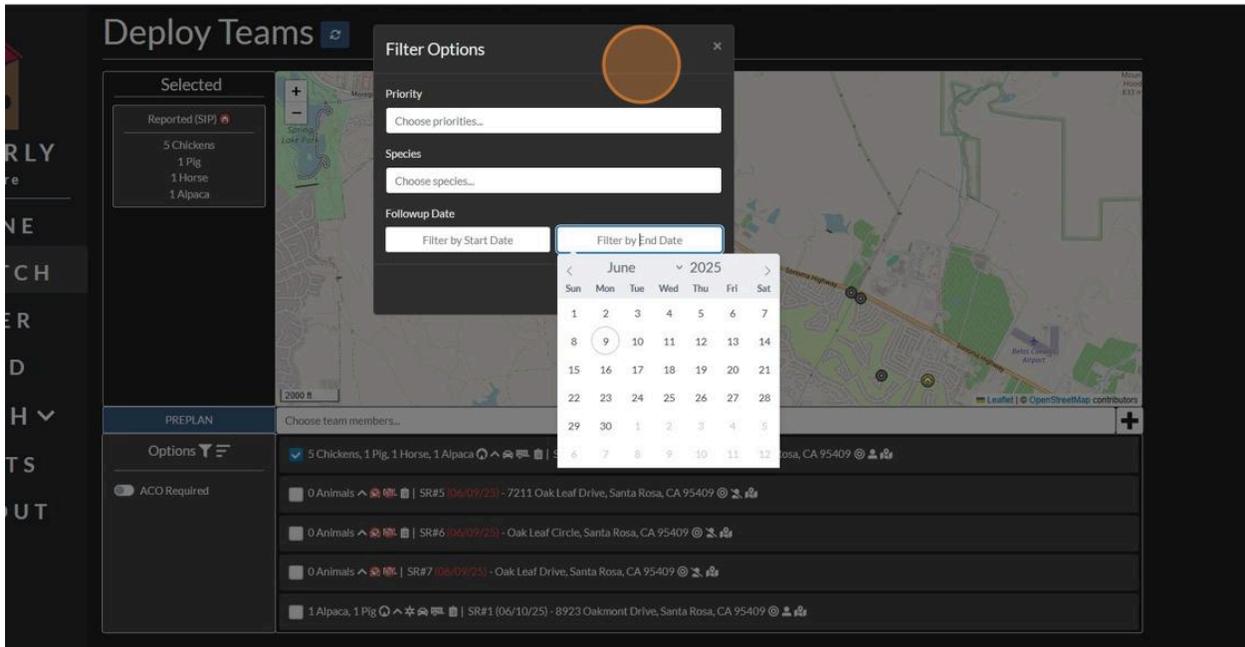
7. To filter by species, click "Choose species" and select appropriate species.



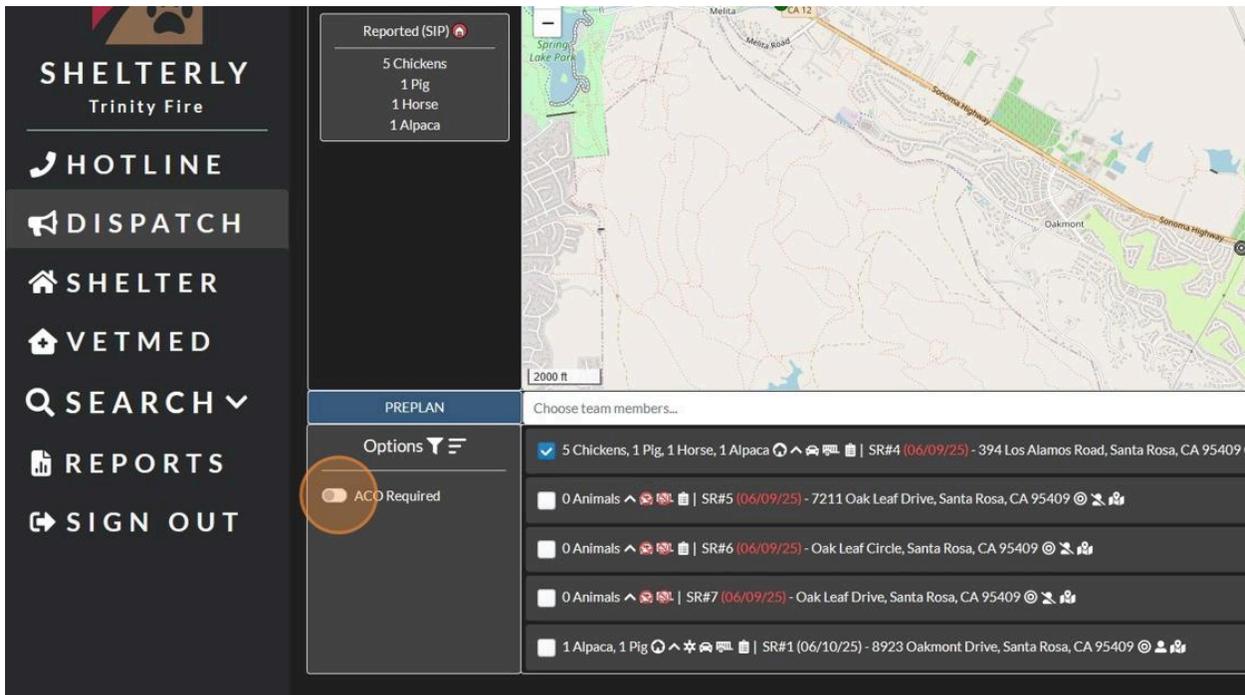
8. To filter by Start Date, click "Filter by Start Date" and select appropriate date to filter by.



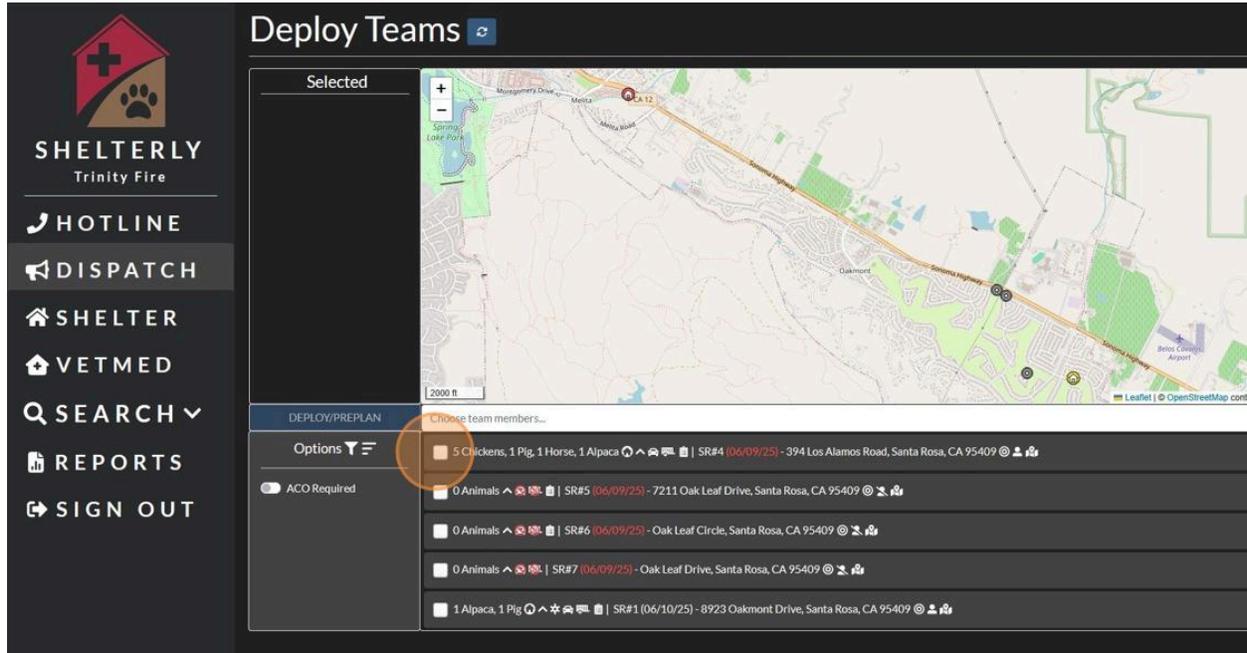
9. To filter by End Date, click "Filter by End Date" and select the appropriate date to filter by.



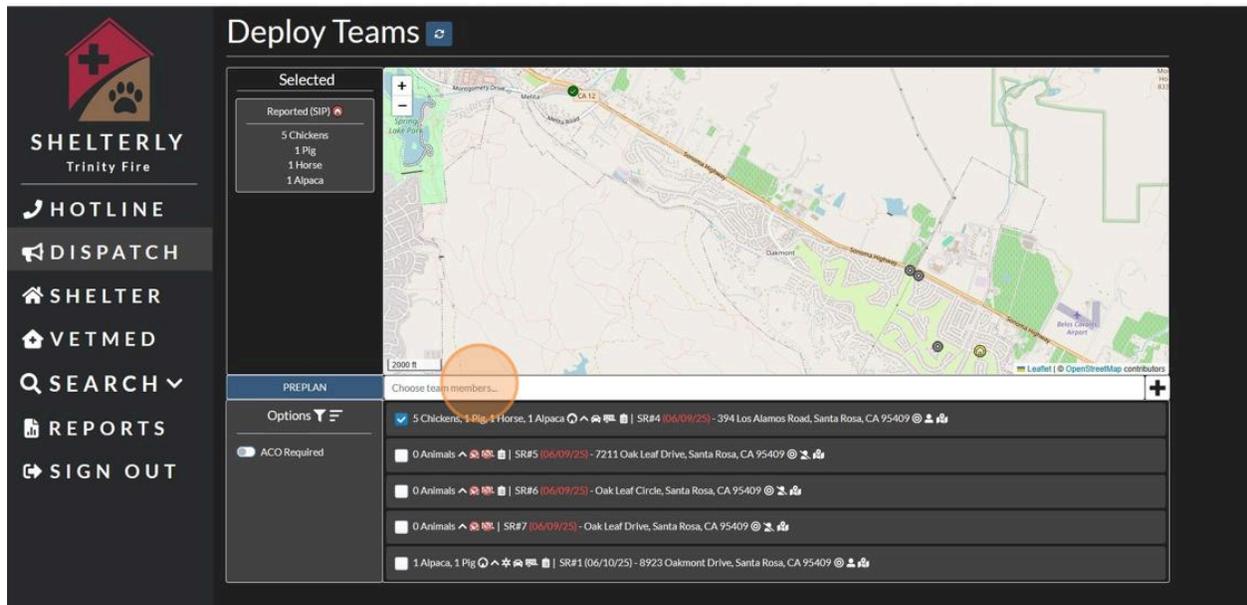
10. To filter by ACO required, toggle ACO Required On.



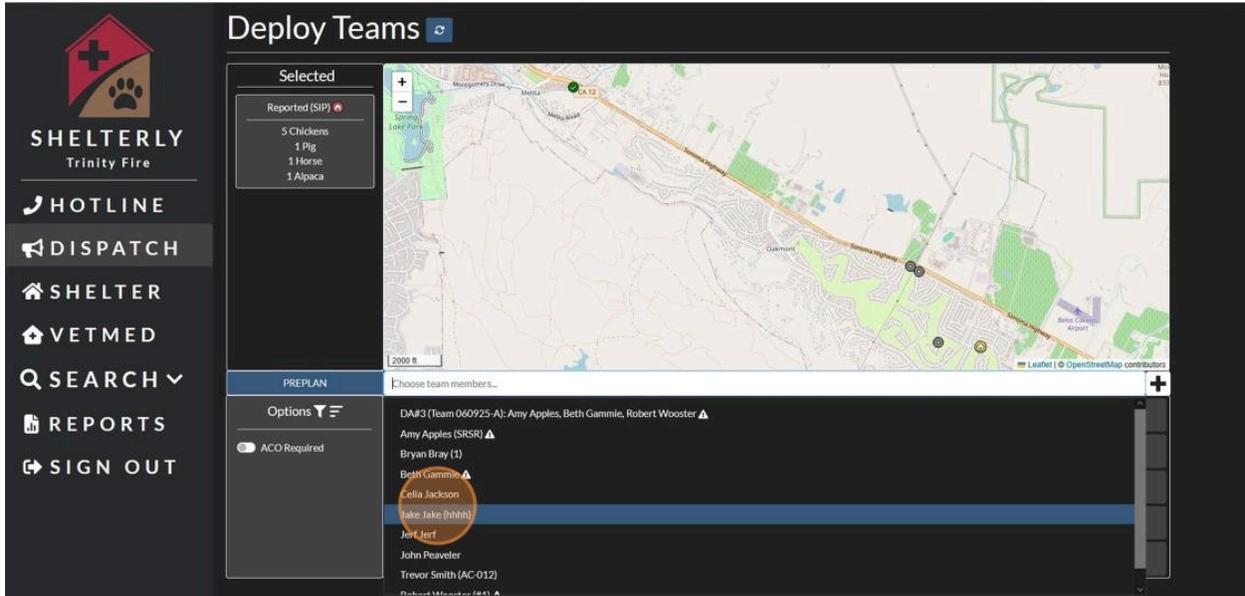
11. To deploy teams, select SR(s) by checking the appropriate box(es).



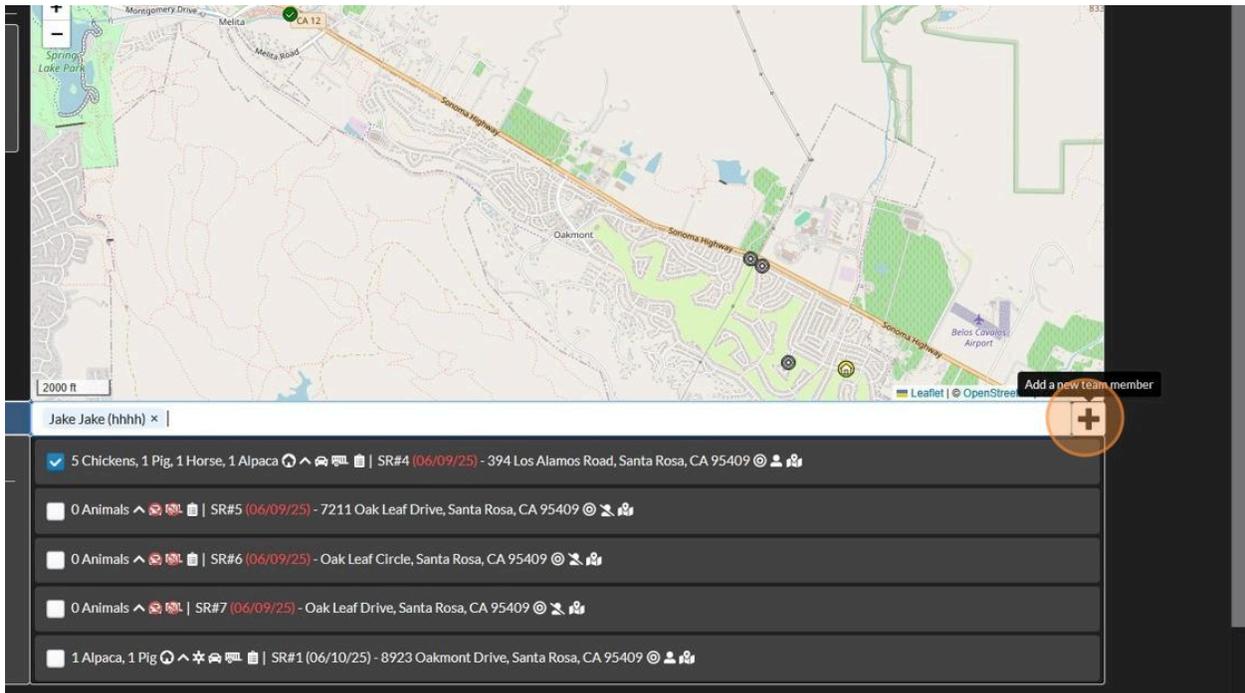
12. Click "Choose team members"



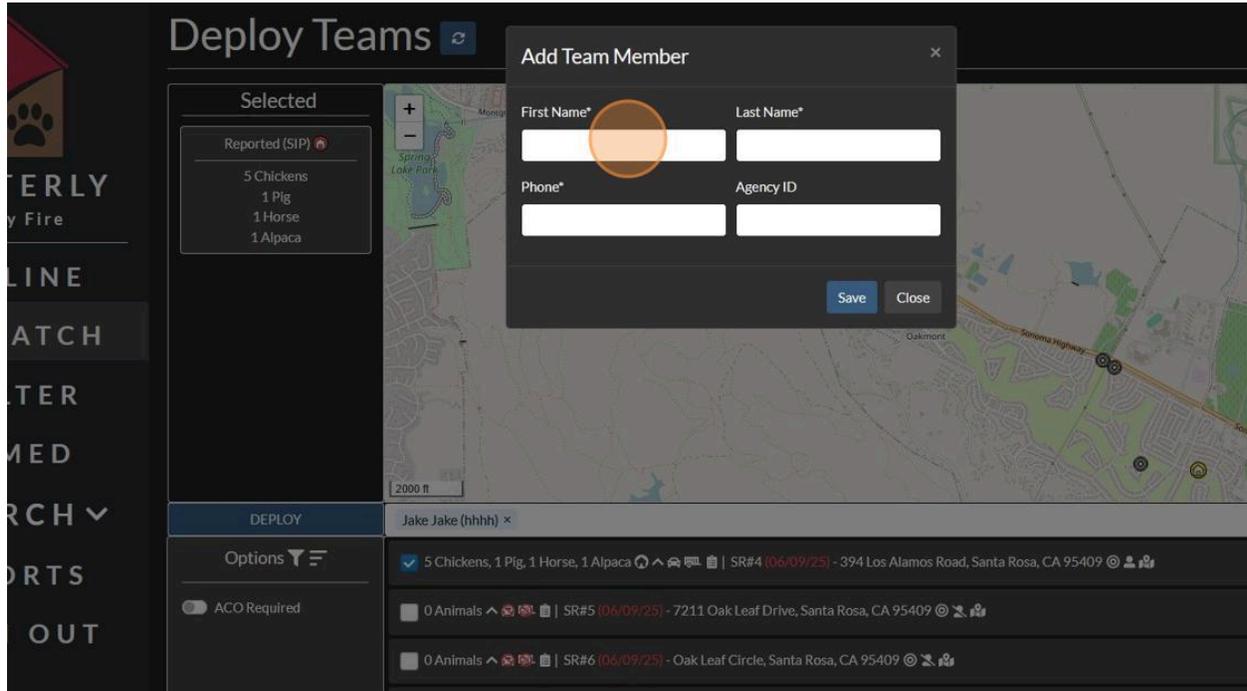
13. Select appropriate team member. (NOTE: triangle icons with ! mean this team member has already been assigned to a DA)



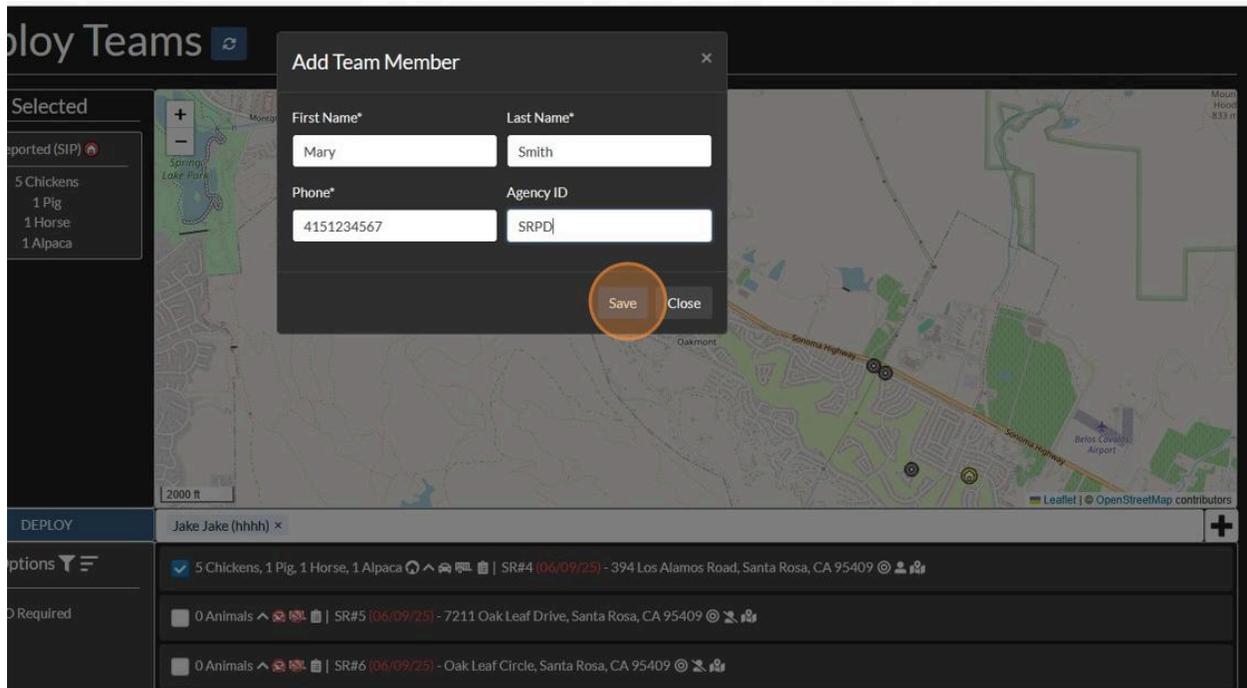
14. If a team member is not listed, click, "+" to add a team member to the list.



15. Add Team Member information



16. When finished entering Team Member information, click "Save"



17. To Deploy teams, click "DEPLOY". The screen will close and you'll see the Dispatch Assignment Summary.

