

Petly Plans

What's New

Version 2.25.0

Data Integration

Petly Plans is now using IDEXX data integration software to reduce the time it takes to sync clients, pets, WP items and item usages to Petly Plans.

Pet Search

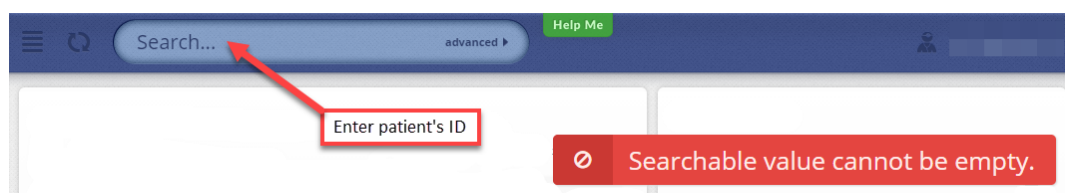
Search Field

When you search for a pet, Petly Plans syncs with your practice management software and pulls in any new or updated information for that pet into Petly Plans.

Steps:

1. In the **Search bar**, enter the patient's ID. Petly Plans will display any matching results.
2. If you do not see the pet, click the **quick sync icon** (circle arrows to the left of the search field). Petly Plans will sync and display matching results.

Note: If you attempt to perform a quick sync without information in the Search bar, an alert will display that search criteria is required.

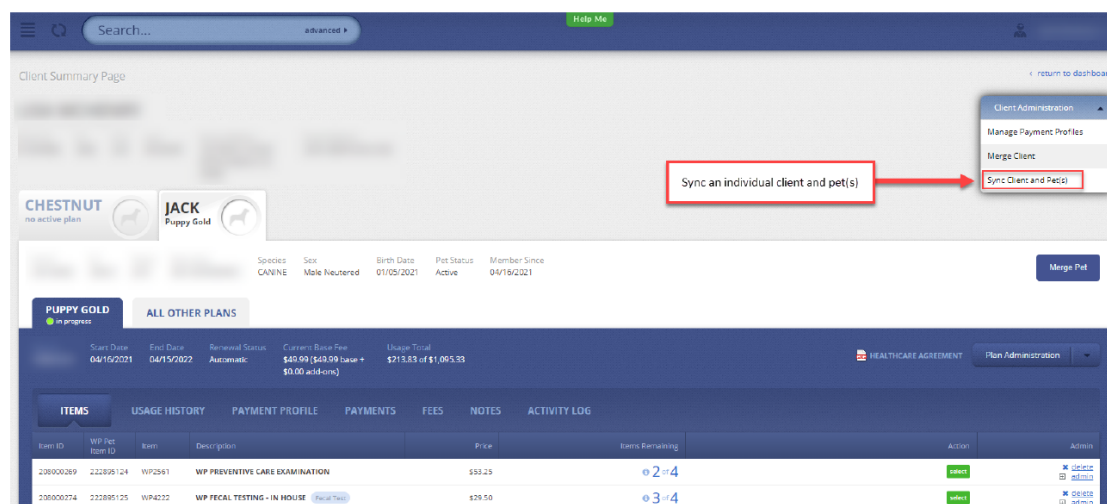


Client Summary Page

You can also sync client and pet information from the Client Summary page.

Steps:

1. Access the Client Summary page for a client.
2. From the **Client Administration** drop-down list, select **Sync Client and Pet(s)**. Petly Plans will perform a sync for the selected client and any related pet(s).



Portal Settings

Syncs & Automation

You can immediately sync Petly Plans with your practice management software at anytime.

Steps:

1. From the menu, go to **Admin > Syncs & Automation**.
2. Click the appropriate area to sync.

