

# Reporting & Remittance Explained



How to use the DocuPet reporting functionality and an explanation of our remittance process.



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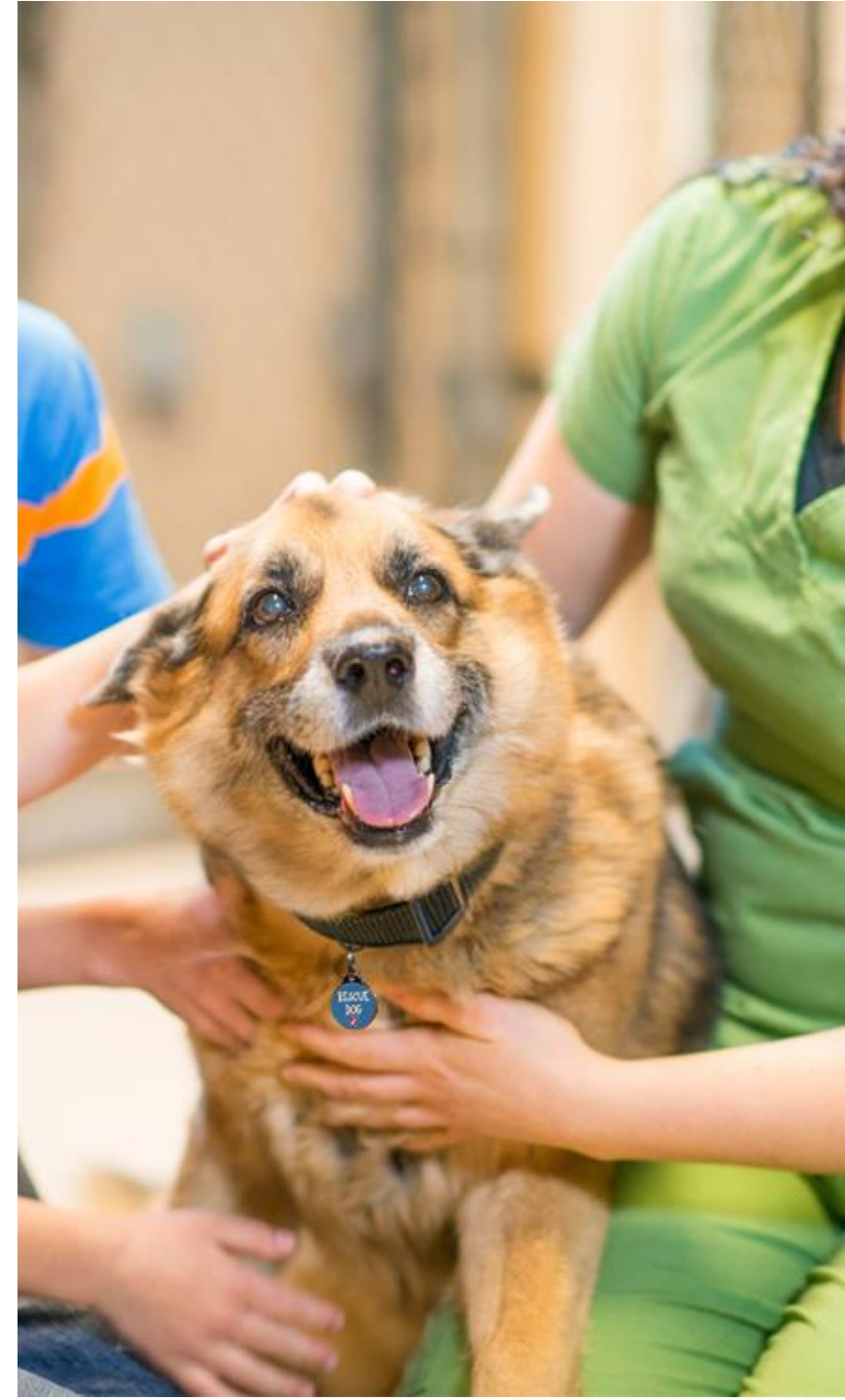
# Overview

Within the DocuPet system, several reports are available to track and monitor sales volumes, revenue, and support remittance.

Additional performance-based reports are also available to help provide insight into overall program performance, including visibility into new licence sales vs. renewals. Reports can be generated based on your preferred time zone.

## Customized Reporting

- If customized reports are needed to support monthly or daily operational or financial requirements, these should be shared in advance of launch so they can be developed accordingly. Customized reports will be delivered via a designated Dropbox folder rather than through the DocuPet system.
- Additional customized reports may also be developed post-launch.





# Reporting Access

Access to the available reports is specified by user permission levels. The reporting tiers available include:



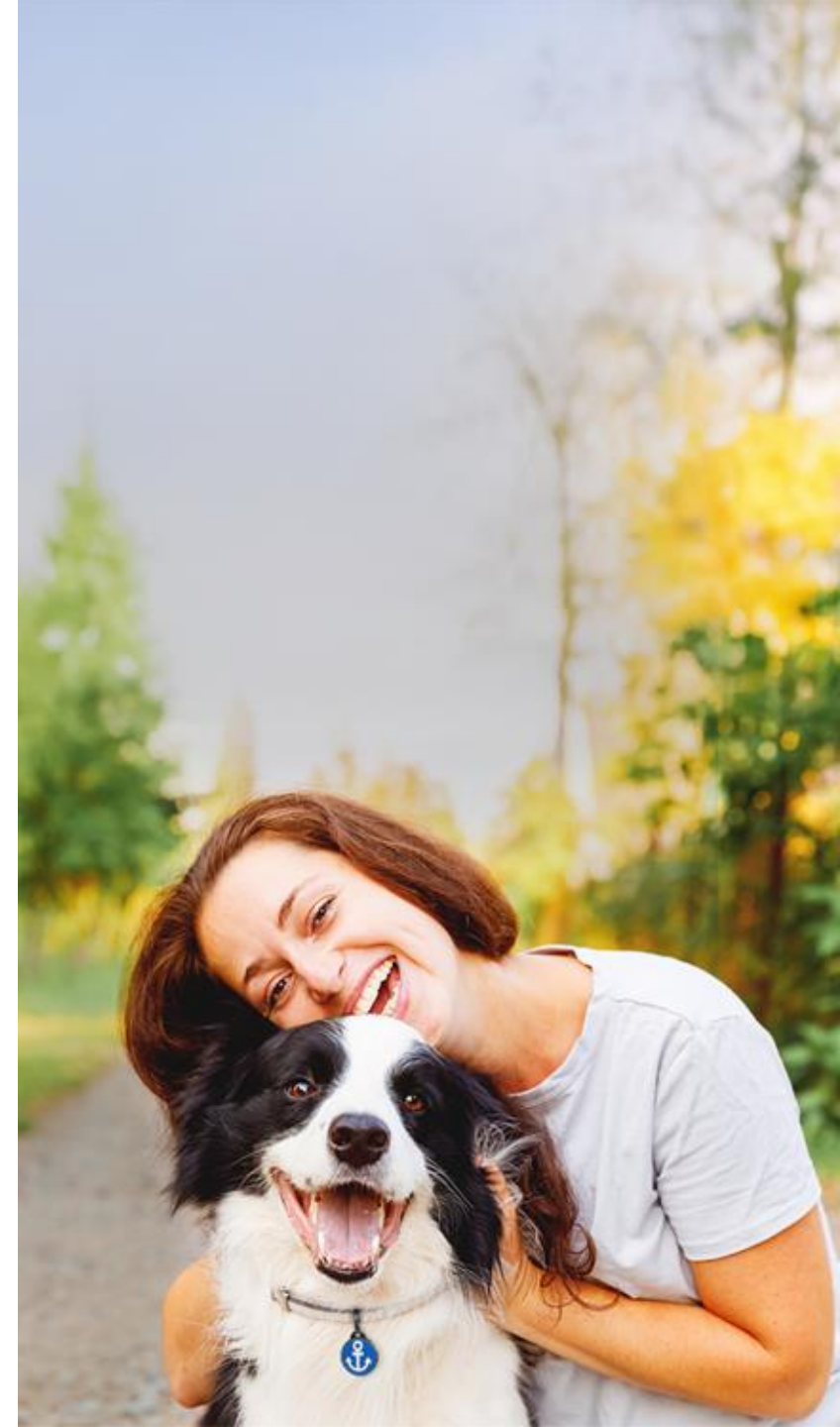
An Administrative Access Needs template is provided to partners to complete prior to launch so we can set up accounts for anyone who requires system access.

Post-launch, partners have the ability to create, edit, and remove administrator access as needed.




# Report Types


- **Vendor Sales Reports:** These reports can be made available to specific users based on vendor permission levels. For example, an individual team member or veterinary clinic can access their own vendor report for reconciliation purposes.
- **Organization Sales Report:** This report provides a comprehensive view of all licence sales processed across all vendors. It can be filtered by jurisdiction, date range, and time zone.
- **Organization Remittance Report:** This report outlines sales collected by DocuPet that will be remitted to the organization, less any applicable contract fees. It should be reviewed monthly by the individual responsible for approving invoices to ensure accuracy and completeness.
- **Performance Reports:** These reports help to illustrate overall program performance and provide insights into new licensing rates vs renewal rates.





# Vendor Sales Report

- All DocuPet partners, along with any approved third-party vendors, can be granted access to DocuPet's secure Reporting Application.
- If you see this symbol  on the reporting page, it indicates that you have **Vendor Report** access. This means you can view sales and remittance reports for your assigned vendor, which can be helpful for daily reconciliation.
- Vendor Sales Reports display transactions for any vendor you've been granted access to, which may include DocuPet, your organization, or a third-party vendor such as a shelter. In some cases, access may be limited to only your own transactions.


 For step-by-step guidance and a video tutorial, [check out the full resources here.](#)

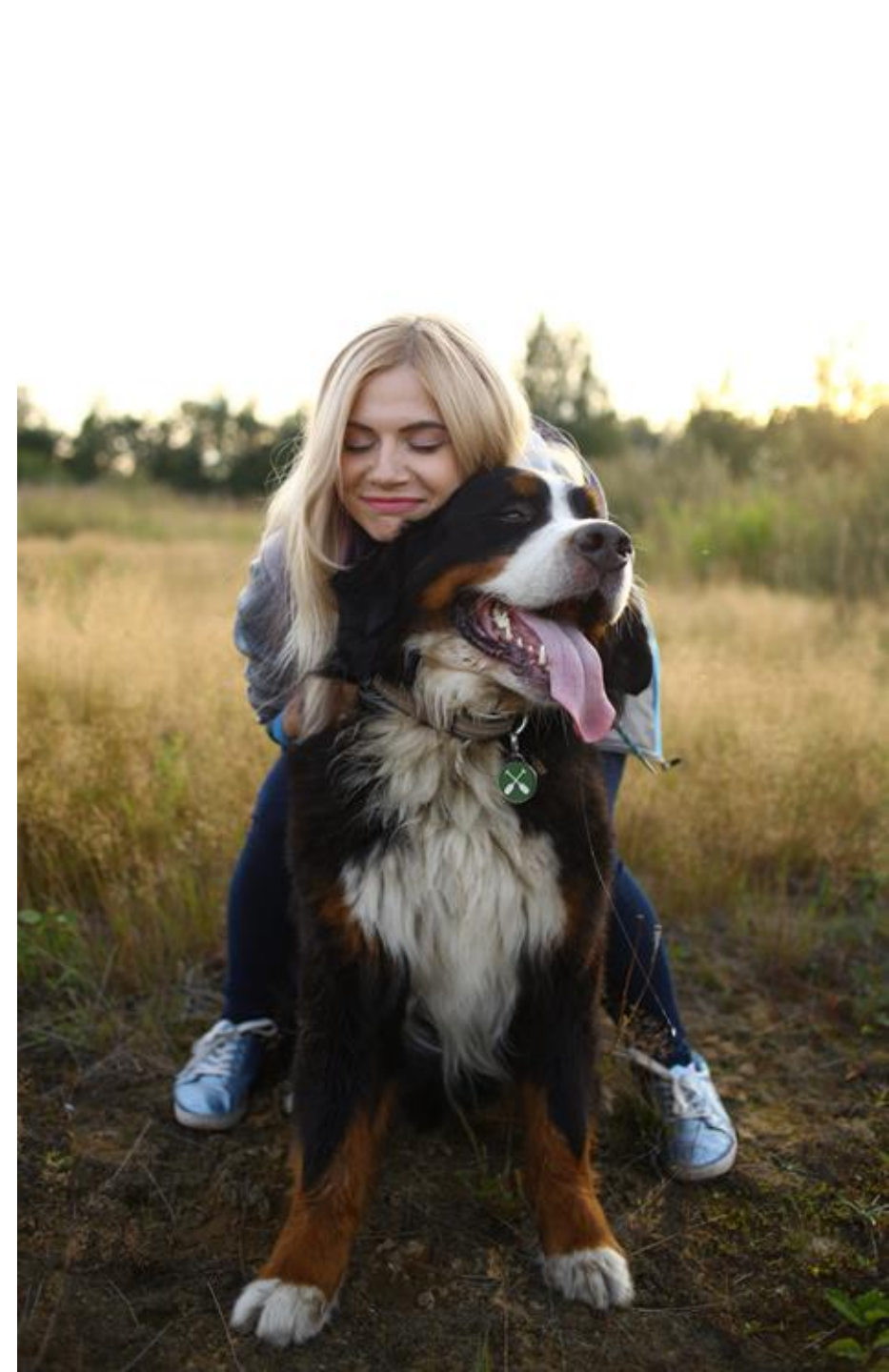




# Organization Sales Report

- All of DocuPet's partners, along with any approved third-party vendors, may be granted access to DocuPet's secure Reporting Application.
- If you see this symbol  on the reporting page, it indicates that you have **Organization Sales Report** access. This means you can view all sales and remittance reports for your jurisdiction. These reports include all transactions associated with and made on behalf of your organization, and are organized by vendor name.

 For step-by-step guidance and a video tutorial, [check out the full resources here.](#)






# Organization Remittance Report

Having **Organization Remittance Report** access means you can view all sales and remittance activity for your organization. This includes:

- Product sales and associated fees
- Remittance totals
- Detailed transaction breakdowns by product and vendor

This access allows your team to efficiently monitor revenue, track licensing activity, and reconcile accounts.

 For step-by-step guidance and a video tutorial, [check out the full resources here.](#)

Organization:	Jurisdiction:	Start Date:	End Date:	Timezone:	Last Adjusted:	
	All Jurisdictions	Jan 01, 2024	Jan 31, 2024	Eastern Standard Time (EST)	Feb 16, 2024	
Categories/Products		Processed By DocuPet				
	(#)		(\$)			
Organization Product Sales Processed by DocuPet						
> Licenses	100		\$1950.00			
> Replacement Tags	3		\$15.00			
<b>GRAND TOTAL - SALES COLLECTED BY DOCUPET</b>			<b>\$1965.00</b>			
	Count	Amount	Total			
Standard Fees						
Licence Fulfillment Package - Tag	110	\$2.80	\$308.00			
Licence and No Tag Package Fee	3	\$2.40	\$7.20			
Replacement Tag Package	2	\$2.80	\$5.60			
Licence Return	1	\$2.80	\$2.80			
Mailed Renewal Notice Fee	74	\$1.43	\$105.82			
Mailed Warning Letter Fee	48	\$1.43	\$68.64			
<b>Total Standard Fees</b>			<b>\$498.06</b>			
<b>TOTAL FEES</b>			<b>\$498.06</b>			

<b>DocuPet</b>				<a href="#">Back to Dashboard</a>		
Categories/Products		Processed By DocuPet				
	(#)		(\$)			
Organization Product Sales Processed by DocuPet						
> Licenses	100		\$1950.00			
Not Spayed/Neutered Dog - One Year	28	\$20.00	\$560.00			
Not Spayed/Neutered Dog - Three Year	3	\$60.00	\$180.00			
Spayed/Neutered Dog - One Year	43	\$10.00	\$430.00			
Spayed/Neutered Dog - Three Year	26	\$30.00	\$780.00			
> Replacement Tags	3		\$15.00			
Replacement Tag	3	\$5.00	\$15.00			
<b>GRAND TOTAL - SALES COLLECTED BY DOCUPET</b>			<b>\$1965.00</b>			




# Remittance Considerations


- Remittance “invoices” are not generated or sent until the 15th (or previous business day if the 15th falls on a weekend or holiday) of the following month. This allows for our team to review and prep the various reports as well as allows time for any changes to be made prior to the month closing out ex. Cancelled orders, refunds etc.
- The invoice will be sent to the provided contact’s email from [billing@docupet.com](mailto:billing@docupet.com). It is the contact’s responsibility to verify the invoice by accessing the Remittance Report available through DocuPet.
- The invoice **must be signed and returned to [billing@docupet.com](mailto:billing@docupet.com)**. Payment will not be released until a signed copy is received. Funds are typically released within 15 days of sign back.
- **Any refunds issued by DocuPet for funds already remitted to the organization will be billed back on the next month’s invoice.**
  - Note that refunds are not reflected in the remittance reports via the online system.

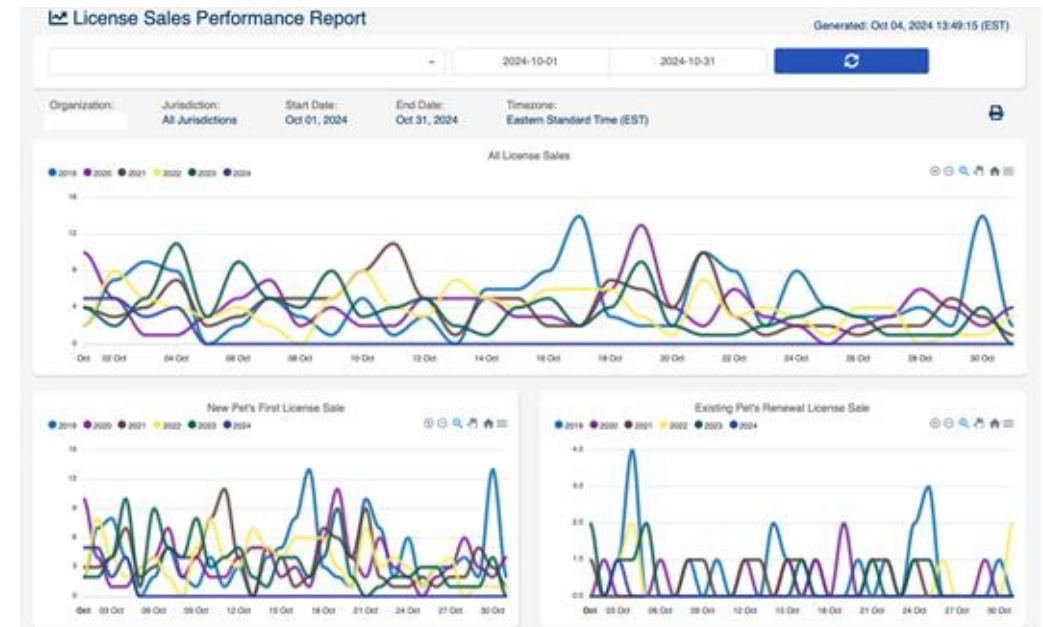




# Performance Reports

- All of DocuPet's partners and any staff members of their choosing may be provided access to DocuPet's secure Reporting Application.
- If you see this symbol  when in the reporting page it means you have "Organization Performance Reports" access. This means that you have the ability to view overall program performance and insights into new licensing rates vs renewal rates.

 For step-by-step guidance and a video tutorial, [check out the full resources here.](#)





# Refunds

- While refunds are relatively uncommon, they may occur for reasons such as an incorrect licence type being purchased, a pet passing after a licence is issued, or duplicate purchases.
- Any refunds issued by DocuPet for funds already remitted to the organization will be billed back on the following month's invoice.
- Refunds are not reflected in system reports; however, DocuPet's Billing Team will provide a separate report with the invoice outlining all refunds issued.
- It is important to note that remittance reports and invoices may not match if refunds have occurred. The invoice total will reflect the remittance amount minus any refunds.

## DOCUPET CORP.

888-517-7352

[billing@docupet.com](mailto:billing@docupet.com)

DocuPet Corp.

15 Technology Place, Suite 1

East Syracuse, NY 13057

Attention:

Date: January 15, 2025

Project Title: Monthly Processing Fees

Project Period: December 2024

Invoice Number:

Item	Total
Standard Fees	\$3,669.05
Refunded Licenses*	\$44.00
<b>Total Invoice Amount</b>	<b>\$3,713.05</b>

\*Not reflected on online report

Description	Total
License Fee Revenue Collected by DocuPet	\$57,467.05
Less Total Fees	\$3,713.05
<b>Funds to be transferred to</b>	<b>\$53,754.00</b>

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_



# Refund Requests

For orders that are placed through DocuPet's credit card processing system (Stripe) that require a refund, a refund request will need to be submitted through our Administrative Support Team.

- Partners can complete a simple online form to initiate the refund process. Once submitted, the request will be sent directly to our team and processed within 1-2 business days.
- If necessary, our Administrative Support Team will automatically cancel the order.
- To ensure fast resolution, please provide all required details on the form to help us process your refund efficiently.
- A link to the refund form can be found here: [Partner Refund Request](#)

For more information on how to process a refund, please refer to this article: [How to Process a Refund](#)

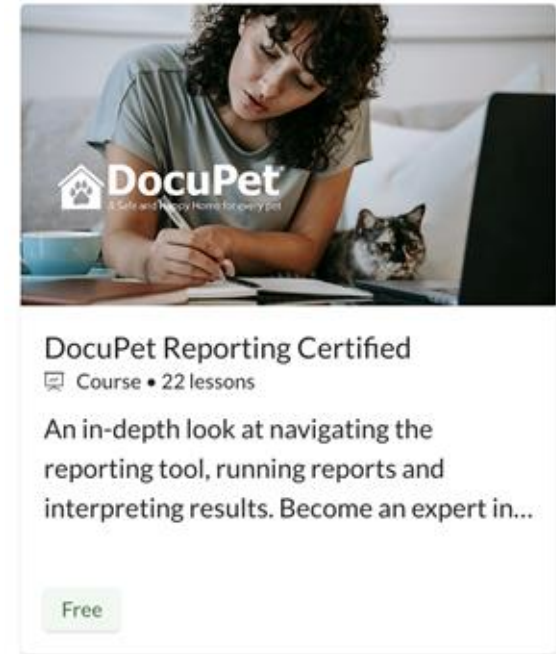




# Reporting Certified

- If you still have questions about reporting in DocuPet, check out our DocuPet Reporting Certified course for additional context.
- In the course, you'll learn where to find reports in DocuPet and how to navigate the reporting section with confidence. It covers how to read and interpret key reports, including sales and remittance reports, and explains what the data means and how it's commonly used.

To enroll and become DocuPet Reporting Certified, click the “Enroll Now” box on the right or [use the course link here](#).



Course

## DocuPet Reporting Certified

**Enroll Now**

 6 Chapters  22 Lessons



# Any Questions?

Contact the DocuPet Team to  
find out more.

