

# Pre and Post Launch Considerations



Key considerations for your organization pre and post launching with DocuPet.



# Table of contents



- Overview
- Training Considerations
- Going Live Considerations
- Delta Data
- DocuPet Responsibilites
- Proof Approval Considerations
- Returned Mail Considerations
- Address Considerations
- Duplicate Considerations
- Fee Change Considerations
- Marketing Considerations
- Remittance Considerations
- Refund Considerations
- Administrative Support
- What to Expect



# Overview

DocuPet understands the important role pet licensing plays in communities. We are committed to making pet licensing more modern, accessible, and user-friendly across North America. In partnership with your organization, DocuPet will help encourage existing licensees to activate their accounts and renew expiring licenses online through our platform.

To support a smooth transition, there are a few key items to highlight before and after launch. For planning purposes, partners can typically expect about three months to become fully comfortable with the system.

During this time, our team will be available to support you every step of the way, and your dedicated Partner Success Manager will check in regularly to help ensure everything runs smoothly.





# Training Considerations

We strive to make your team's transition to DocuPet as smooth and straightforward as possible.

Training will be self-guided through DocuPet's certification program, allowing your organization to move through the material at your own pace. All training resources, including step-by-step guides and reference materials, will be available on our [HelpDesk](#) at any time.

To support hands-on learning, your team will have access to our demo environment, where administrators can practice key tasks and explore the system ahead of the soft launch.

Knowledge check quizzes will be included throughout the training course to help assess familiarity with the platform. Ongoing training resources will remain available through [DocuPet's Certification Program](#) after launch, enabling your team to refresh skills or onboard new staff as needed.





# Training Considerations

Once the system is live, DocuPet's Implementation Team will host a follow-up Q&A session for any staff who wish to attend. This session provides an opportunity to ask role-specific questions and gain further clarity after working in the system.

Following the initial training, your organization will be responsible for onboarding and training any new employees using DocuPet's available resources.

The Administrator [HelpDesk](#) and [DocuPet Certification Courses](#) remain accessible at all times, offering a wide range of training videos, FAQs, and up-to-date reference materials to support ongoing learning.

Administrator Support: ✉ [support@docupet.com](mailto:support@docupet.com) ☎ 1-855-224-2481

Customer Support: ✉ [info@docupet.com](mailto:info@docupet.com) ☎ 1-877-239-6072



[Home](#)

[Pet Owner Record Search](#)

[National Pet Record Search](#)

[Account Settings](#)

[HelpDesk](#)

[FAQ](#)

[Logout](#)



# Going Live Considerations

The day before your soft launch, a DocuPet team member will email all administrative staff their login credentials, and the system will go live on the morning of your launch date.

Once live, your organization will be able to add or remove administrative staff directly in the DocuPet system, including adjusting permission levels.

From this point on, all licence sales should be processed through DocuPet to ensure information remains up to date.

As a reminder, our goal at DocuPet is to encourage pet owners to license online to reduce in-person volume and support timely renewal reminders. We encourage your organization to do the same by directing pet owners to the online platform for a seamless licensing experience.





# Delta Data

After launch, it is critical to provide DocuPet with the Delta Data file as soon as possible. This file includes all licenses sold or adjusted between the initial data pull and the go-live date. Licensing communications cannot be activated until the file is received, processed, and uploaded.

Once the Delta Data file has been imported and communications are activated, your organization enters the “hard launch” phase. Pet owners will begin receiving renewal notifications and be directed to license their pets, and your organization should expect an increase in volume.





# DocuPet Responsibilities

Once your organization is live, DocuPet will be responsible for the following:

- Tag fulfillment
- Renewal and warning communications
- Processing mailed in licence purchases
- Pet owner customer support

We understand that change can take time. Most organizations need about 3–6 months to fully adjust and become comfortable with the system.

Our team will support you every step of the way and remain readily available to assist whenever needed.





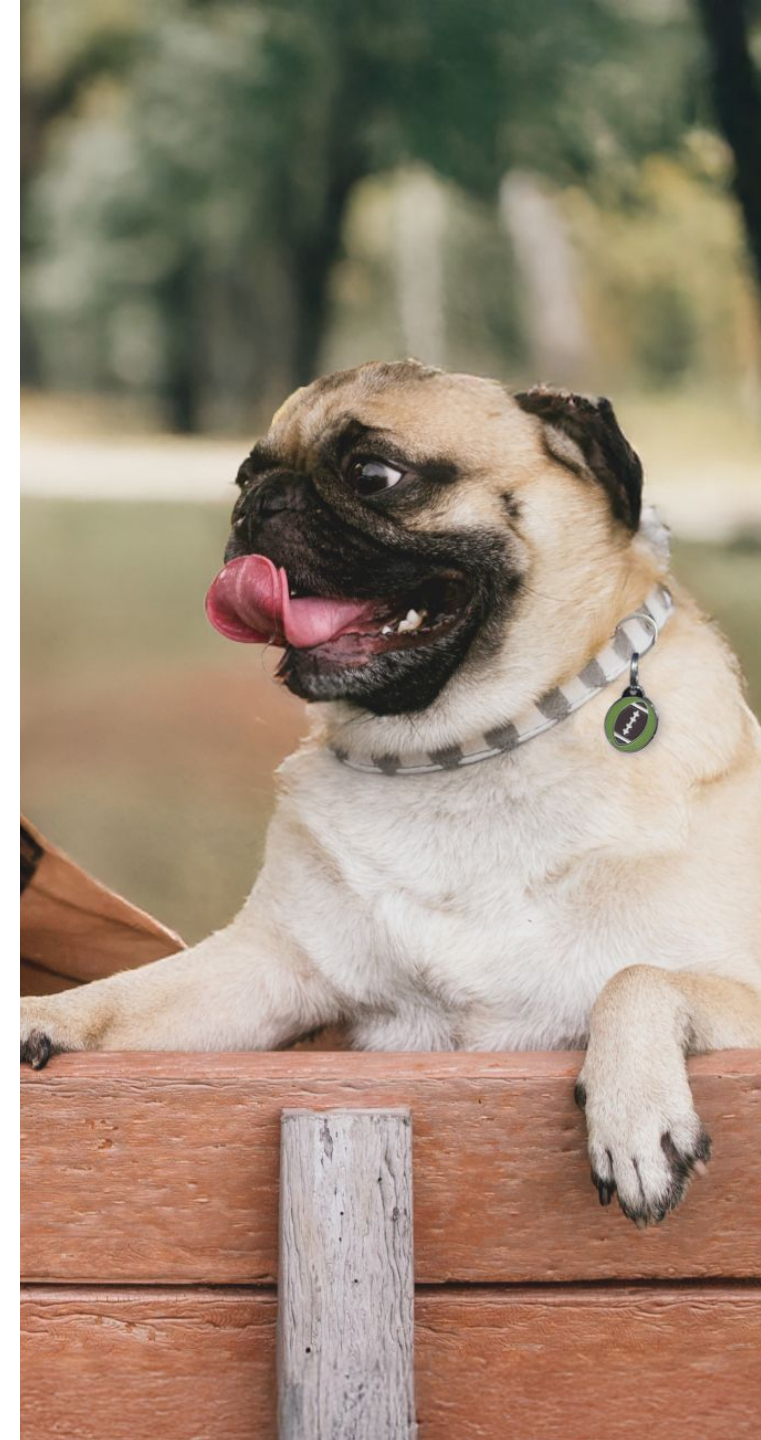
# Return Mail Considerations

To reduce confusion within the community, DocuPet includes your organization's logo and address on all letter communications sent to pet owners. As a result, any returned mail will be sent directly to your organization.

It is important to process this mail and flag the pet owner's account as "[returned mail](#)" so that:

- Your team has visibility if a pet owner inquires about missing communications or disputes a late fee
- DocuPet does not continue sending mail to an invalid address

Once the address has been updated and validated, the returned mail flag will be automatically removed and DocuPet will resume sending letter communications.





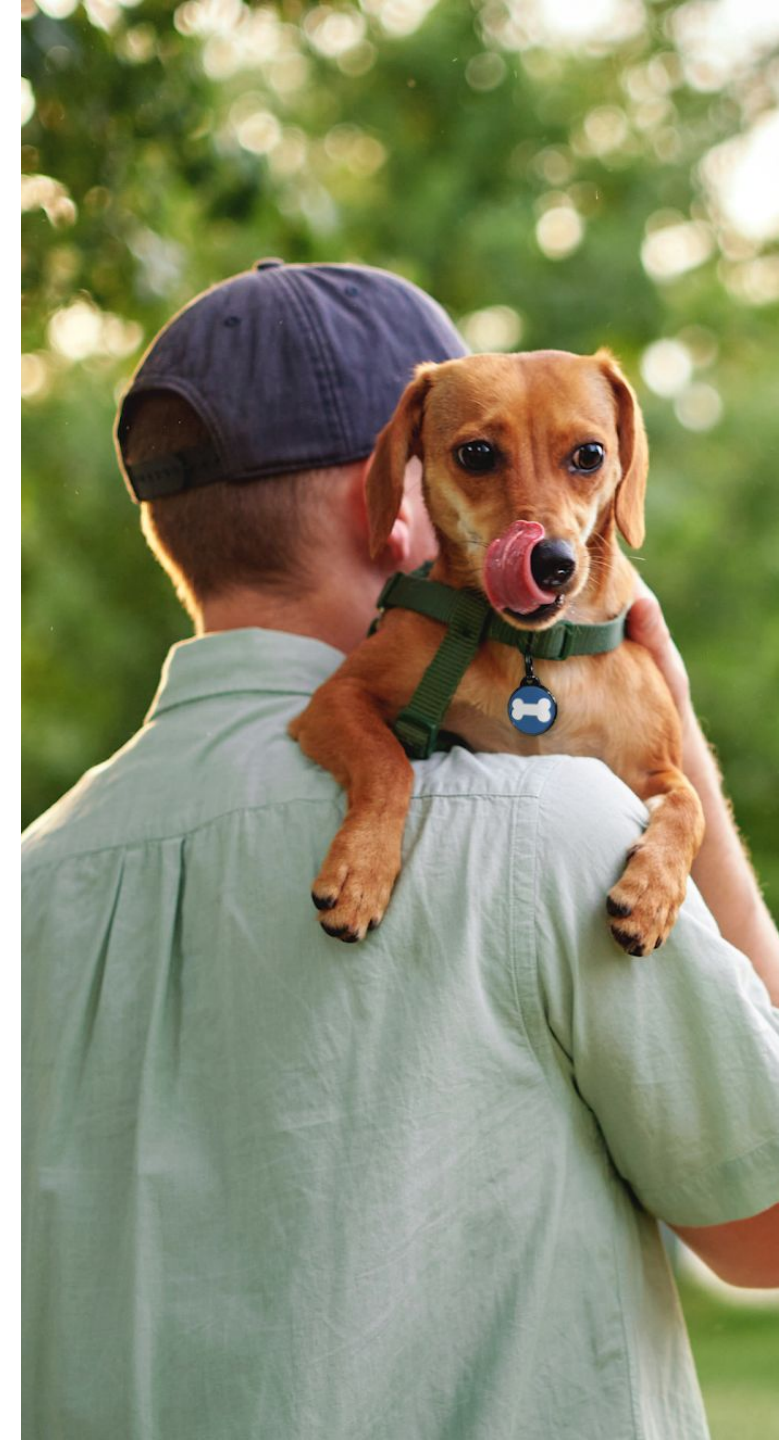
# Address Considerations

Remember, the DocuPet system requires an exact match to an Authoritative Address (AA) using your provided GIS data. For example, if you enter “Drive” but the system contains “Dr,” the address will not appear as valid.

We strongly encourage staff to use the auto-populated dropdown when an address appears and to ensure all options are exhausted before manually entering a new address.

For more information on adding an authoritative address, please refer to our helpful guide available via the [HelpDesk](#).

We suggest your organization establish internal policies for adding addresses to the system. This will help prevent duplicate data entry and ensure pet owners are licensing in the correct jurisdiction.





# Duplicate Considerations

The Pet Owner Merge tool allows administrators to combine two or more pet owner accounts. Common reasons for merging accounts include:

- A pet owner creates a new profile online when one already exists
- The organization provides multiple records for the same pet owner with differences in address, spelling, or associated pets
- Multiple records exist for the same pet with different listed owners
- A pet has co-owners who each created separate profiles
- Individuals at the same address want all pets combined under one profile

This tool can be found on the homepage under **Data Management/Administration** titled “[Pet Owner Merge](#)” and is available to administrative users with the appropriate permissions.

**Important:** Once accounts are merged, they cannot be unmerged. Please review all information carefully before completing a merge. For more information, please visit the [HelpDesk](#).



# Fee Change Considerations

We understand that your organization may experience licensing fee changes from time to time. While this may seem like a simple update, it is a significant process for DocuPet, regardless of the scale of the change.

As a result, we require a minimum of two months' notice to accommodate any fee adjustments. This allows time to coordinate across DocuPet teams and notify your community in advance, helping to avoid confusion or disputes when renewal notices reflect updated fees.

Please contact your Partner Success Manager for more information, or refer to the **Launch Hub** for a detailed overview of the process.





# Marketing Considerations

At this point, we have likely covered key marketing elements such as a press release, website updates, and social media content. Handling of the press release is at your discretion; however, we recommend updating your website on the day of soft launch to direct pet owners to your unique DocuPet site so they can license their pets.

DocuPet also offers a [Marketing Menu](#) (with a corresponding [Order Form](#)) featuring creative tools and ideas to help educate your community on pet licensing.

If you would like to place an order at any time, please reach out to your Partner Success Manager.

Licensed to *play*.

Keeping pets safe and communities strong starts with pet licensing. [Partner]'s licensing partner, DocuPet, makes it easy.

License your pet in minutes  
Scan the QR code, or visit  
xxxxxxxxx.docupet.com

QR CODE

DocuPet

PARTNER LOGO

Redeem your free designer tag!

Your promo code:  
PROMOCODE

PARTNER LOGO

DocuPet

Licensed to *explore*.  
Con licencia para explorar.

Keeping pets safe and communities strong starts with pet licensing. [Partner]'s licensing partner, DocuPet, makes it easy.

Mantener a las mascotas seguras y a las comunidades fuertes comienza con la obtención de licencias para mascotas. DocuPet, socio de licencias de [Partner], lo facilita.

License your pet in minutes  
Obtén la licencia de tu mascota en minutos  
xxxxxxxxxxxxx.docupet.com

QR CODE

DocuPet

PARTNER LOGO



# Remittance Considerations

Remittance “invoices” are generated and sent on the 15th of each month (or the previous business day if the 15th falls on a weekend or holiday). This allows time for our team to review and prepare reports, as well as make any necessary adjustments before month-end (e.g., cancelled orders or refunds).

Invoices are sent to the designated contact via [billing@docupet.com](mailto:billing@docupet.com). It is the contact’s responsibility to verify the invoice using the Remittance Report available in 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.

Any refunds issued by DocuPet for funds already remitted will be billed back on the following month’s invoice. Please note: refunds are not reflected in the online remittance reports.





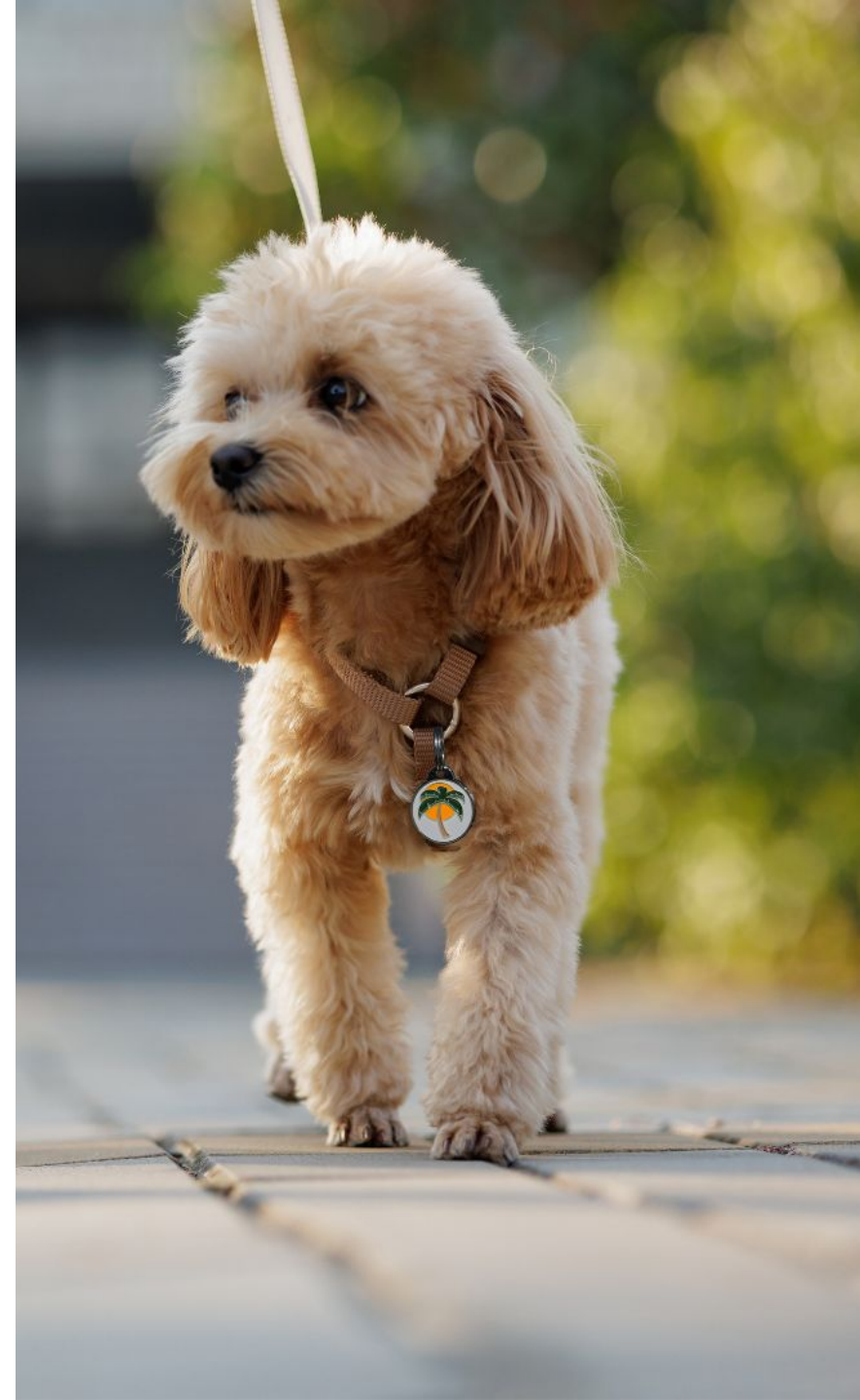
# Refund Considerations

Refunds are infrequent but may occur for reasons such as incorrect license type, duplicate purchases, or a pet passing after a license has been issued.

For Stripe orders requiring a refund, a request must be submitted via the Administrative Support refund form. Once submitted, requests are processed within 1–2 business days. If necessary, our team may also cancel the associated order.

To ensure timely processing, please include all required details in the form. A link to the refund form can be found [here](#).

For a full overview of the process, please visit: [How to Process a Refund](#).





# Administrative Support

If your team cannot find the answer in the [HelpDesk](#), or if an inquiry requires DocuPet's involvement, our Administrative Support team is available to assist via a dedicated phone line and email.

Please contact Administrative Support for the following situations:

- Processing refunds for orders paid through DocuPet's payment processor (Stripe)
- Adding a vendor for a new admin user (to restrict visibility to their own sales)
- Correcting orders
- Changing the sale admin/vendor on an order
- Updating the payment type on an order
- Cancelling an order, if required





# Administrative Support

Our Administrative Support Team is available:

- **Monday–Friday: 8:00 AM – 8:00 PM EST**

**Email:** [support@docupet.com](mailto:support@docupet.com)

**Phone:** 1-855-224-2481

**Please note:** These contact details are for administrative use only and should not be shared with pet owners, as they have their own dedicated Customer Care team for support.





## What's Next

DocuPet is here to help reduce your organization's internal licensing workload while increasing licence sales.

Your Partner Success Manager is always available to support your organization and discuss your licensing program. They will connect with you quarterly to review performance, share key insights and stats, and offer recommendations to help drive revenue and sales.

If you would like additional insights at any time, we're happy to provide tailored reporting and performance data.

Let's go and redefine pet licensing!





# Any Questions?

Contact the DocuPet Team to  
find out more.

