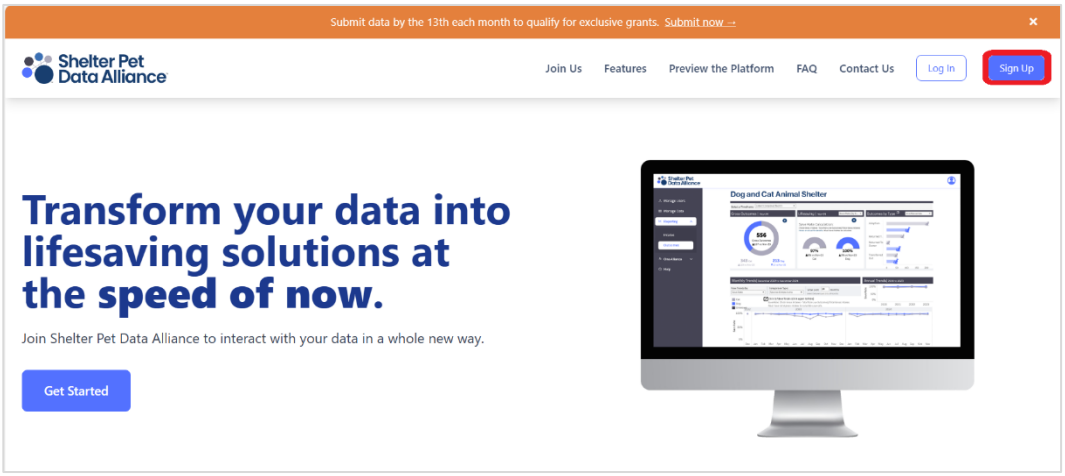
Shelter Pet Data Alliance™
powered by Best Friends

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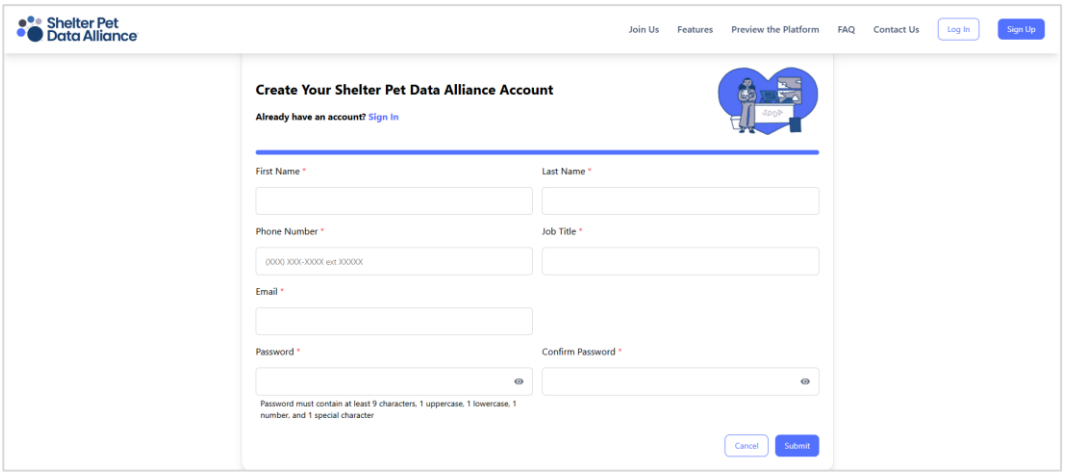
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Creating a User Account and Organization Profile

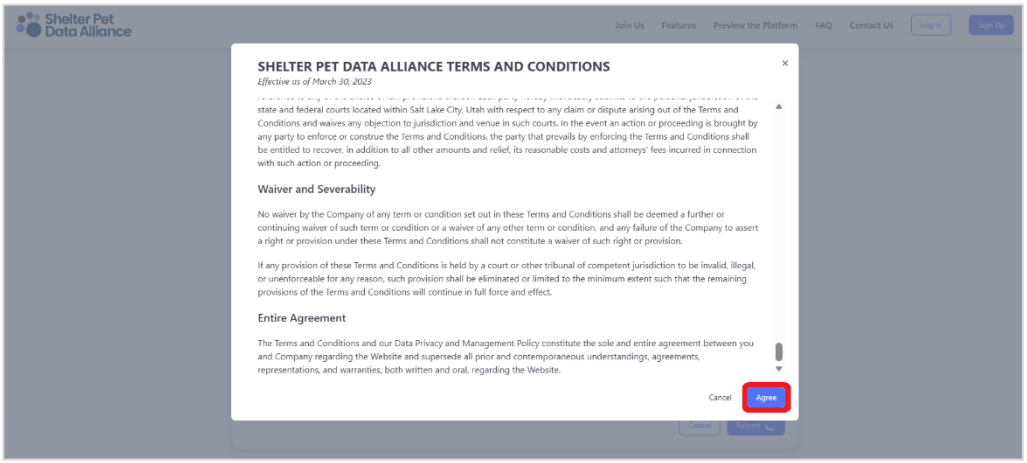
1. In your internet browser, type **shelterpetdata.org** in the address bar.
2. Click **Sign Up** on the upper right corner of the page.



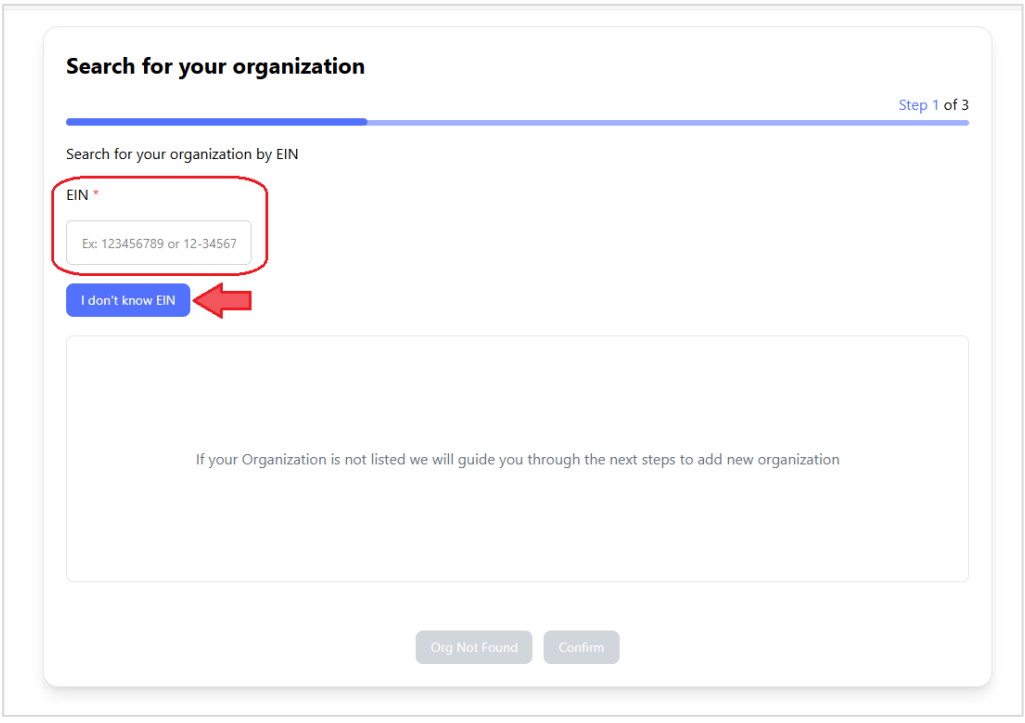
3. Enter your first name, last name, phone number, job title, and email.
4. Create a password and confirm password.
5. Click the **Submit** button.

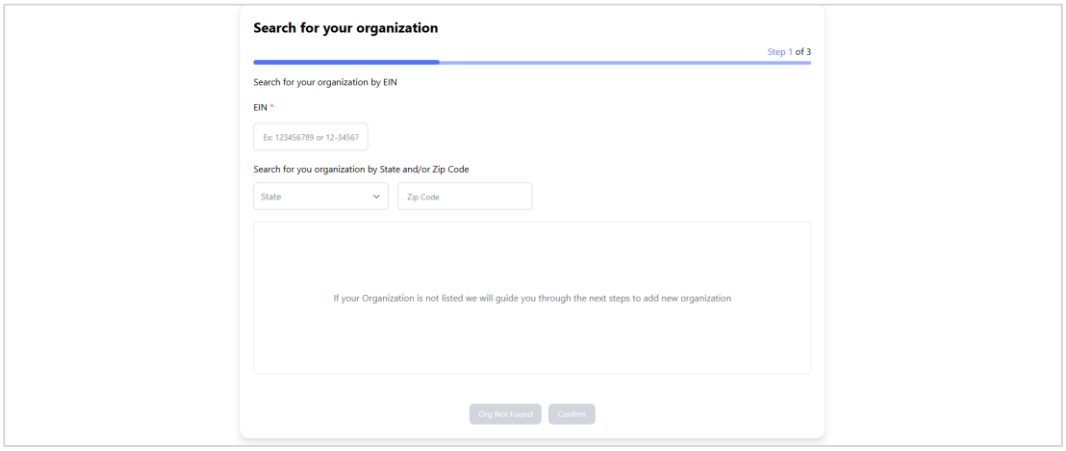


6. Review and agree to the Shelter Pet Data Alliance Terms and Conditions of Use. You must scroll to the bottom of the agreement to see the **Agree** button.



7. Check your email inbox for the verification email and click **Verify Email Address.**
8. You will be automatically directed back to the website. **DO NOT STOP HERE.**
9. Click **Log In** and input your username (email address) and the password you created in step 4, then click **Log In**.
10. The *Search for your organization* section will be used to determine if your organization already has an account in Shelter Pet Data Alliance.
    a. The preferred way to search for your organization is by using the EIN.
    b. If you don't know the EIN for your organization, click the **I don't know EIN** button to search by state and/or zip code.





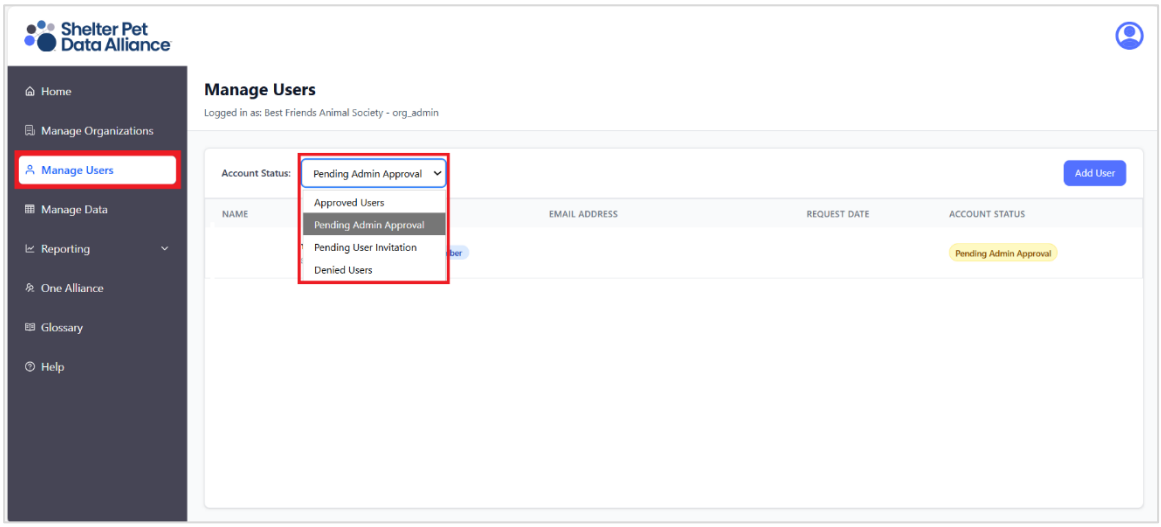
11. Find your organization in the search box or complete the steps to create a new org profile.
    a. Your organization may be in our system and have an account in SPDA. If this is the case, it will appear in the search box. Click the box to the left of the EIN to select it then click **Confirm**. An email will be sent to all administrators of the account, and they will be able to accept or deny your request to join the organization. *Note: If the current administrators are no longer with the organization, please submit a Help ticket requesting access. For instructions on submitting a Help ticket, go to the *Submitting a Help Ticket* section on page 25.
    b. Your organization may be in our system and not have an account in SPDA. If this is the case, it will appear in the search box. Click the circle to the left of the EIN to select it then click **Confirm**. Complete step 2 to create your org profile, then click **Next**. Complete step 3, then click **Complete Registration.**
    c. Your organization may not be in our system. If you've conducted a thorough search for your org and it does not appear in the list, click the **Org Not Found** button. Complete step 2 to create your org profile, then click **Next**. Complete step 3, then click **Complete Registration.** *Note: If your organization is not in our system, and you register, the SPDA support team will need to verify your EIN and organization information. Please allow up to 3 business days for the verification to be completed. In the meantime, you can enter data, but it won't be processed until you receive the notification that your organization has been verified.

Approving/Denying New Users and Adding New Users

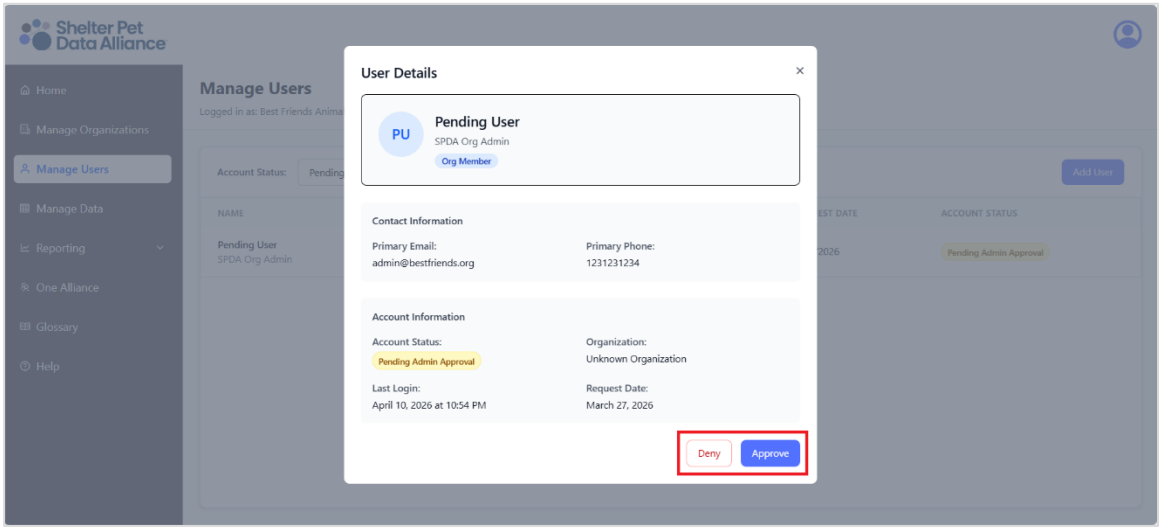
If you have Org Admin level access, you will be able to accept or deny requests for new users to join your organization's SPDA account. You will be notified of any new requests via email. The Home page will also display a notification if there are pending users.

Follow these instructions to approve or deny the new user access request.

1. Click **Manage Users** from the left menu.
2. Select *Pending Admin Approval* from the account status.



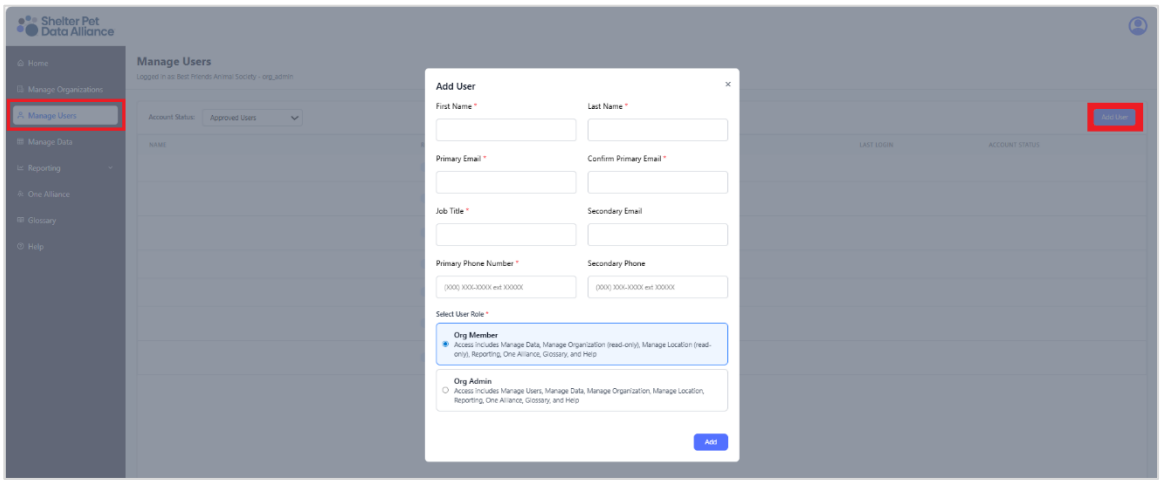
3. Click on the user's name from the list.
4. Click the **Approve** or **Deny** button.



If you have Org Admin level access, you will also be able to add new users by inviting them to join your organization's SPDA account.

Follow these instructions to add new users.

1. Click **Manage Users** from the left menu.
2. Click the **Add User** button on the right side of the screen.
3. In the Add User popup, complete all required fields.
4. **Select User Role** of Org Member or Org Admin.
5. Click the **Add** button.
6. The invited user will receive an email invitation with their temporary password.



Opting-In to Automatic Data Sharing

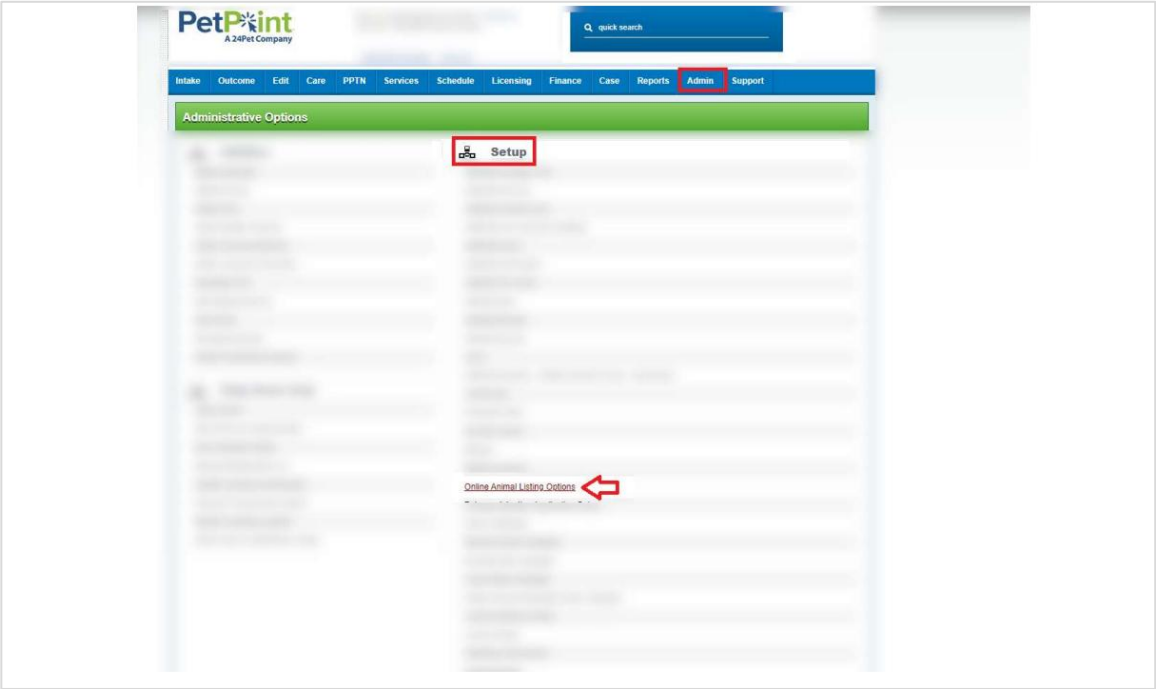
These instructions only apply to users of PetPoint, ShelterBuddy, Shelterluv, and Animal Shelter Manager.

Please note there may be slight data discrepancies between your shelter management system reports and totals in Shelter Pet Data Alliance.

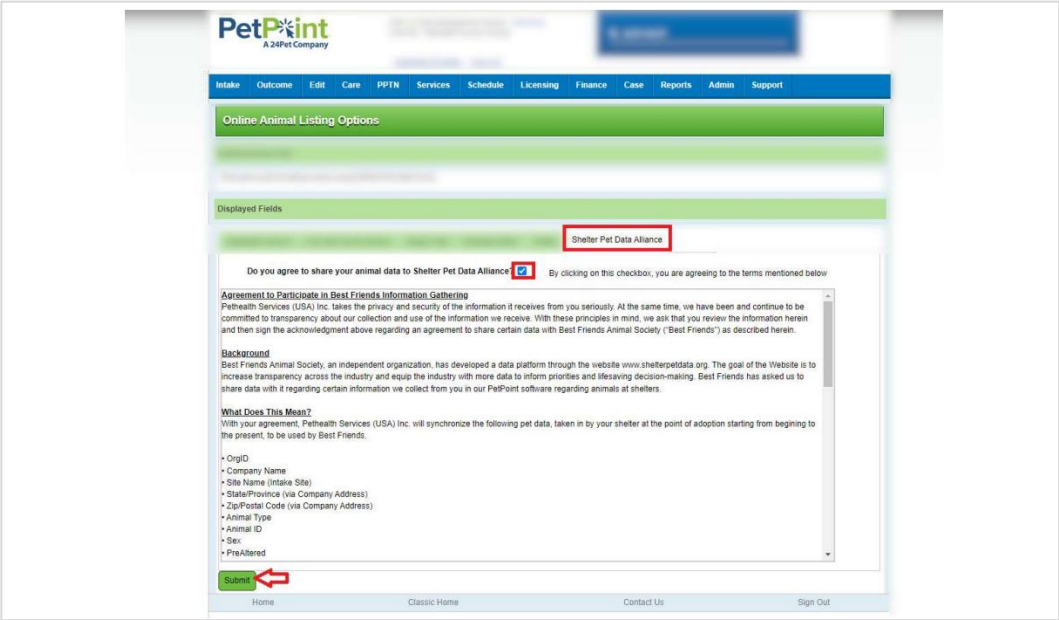
PetPoint Steps:

Complete the following steps in PetPoint to begin the opt-in process for data sharing. If you have any questions or run into any issues, please **contact PetPoint support** directly for assistance.

1. Go to the **Admin** options in your PetPoint account.
2. In the Setup column, select **Online Animal Listing Options**.

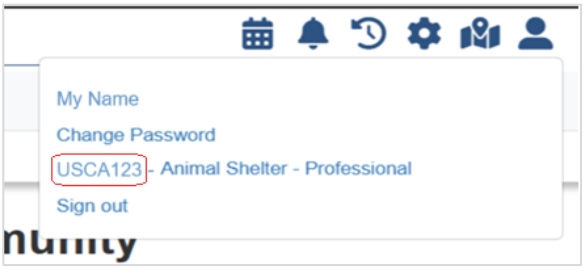


3. Click on the Shelter Pet Data Alliance tab, agree to the terms by clicking on the checkbox, and the click submit to enable data sharing. **DO NOT STOP HERE.**



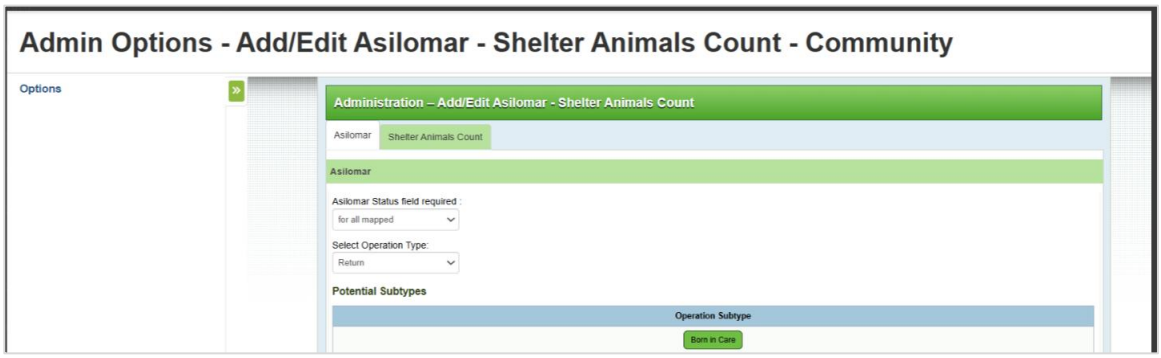
4. **IMPORTANT STEP** – It is important to complete the mapping updates in your PetPoint account before entering your PetPoint **orgID** in Shelter Pet Data Alliance. To update your mappings, you can view this **video** or follow the steps below:
    a. Navigate to Admin > Admin Options.
    b. Select Add/Edit Asilomar – Shelter Animals Count.
    c. Select the Shelter Animals Count tab.
    d. Within the 'Operation Type' dropdown, go through each value.
    e. For each operation type value, ensure that all subtypes your organization utilizes are properly added to each mapping value. Mapping outdated or deleted values has no negative effect and mapping those can reduce potential reporting discrepancies.
5. Complete the Shelter Pet Data Alliance steps starting on page 11.

Your PetPoint **orgID** typically matches the Shelter ID used to login. It can be found by clicking on your profile. The format is: "US" + your state abbreviation + a 2–3-digit number (e.g., USCA123).

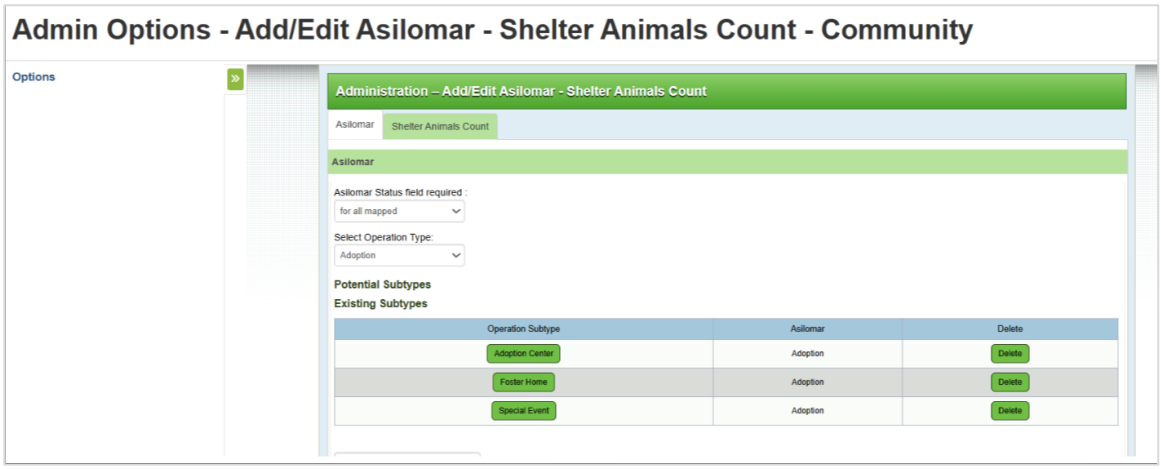


If automatic data sharing is already turned on in your Shelter Pet Data Alliance account and you've noticed discrepancies in your data, it's likely you need to update your mappings. If this is the case, follow Step 4 above then submit a **Help ticket** to let the SPDA team know you've adjusted your mappings. Due to the complexity of work behind the scenes, we'll need to take some time to validate the changes and make sure your data is up-to-date and accurate. This process will take 2-3 days before the corrected data is in your account.

Example of Unmapped Operation Subtype:



Example of Mapped Operation Subtype:



ShelterBuddy Steps:

To enable the data feed from your ShelterBuddy database to the Shelter Pet Data Alliance (SPDA) database, you must first ensure the API is enabled on your ShelterBuddy account. If you are unsure whether the API is enabled, please email **support@shelterbuddy.com**, and their team will be happy to check for you.

Once the API is enabled for your ShelterBuddy site, follow these steps.

1. Email **support@shelterbuddy.com** to request a new set of API credentials for the Best Friends SPDA feed. Be sure to include in your request that the credentials are for the "Best Friends SPDA feed".
2. The ShelterBuddy team will send credentials back to you securely.
3. Complete the Shelter Pet Data Alliance steps starting on page 11.

Shelterluv Steps:

To enable the data feed from Shelterluv to the Shelter Pet Data Alliance (SPDA) database, you must first generate an API Key that will be used as your credentials in SPDA.

Here are the steps that need to be taken to generate the API Key for SPDA.

1. Log in to your Shelterluv account.
2. Select *Configuration* from your top-right dropdown menu.
3. Select *Integrations* then click on the notification to access the form.
4. You should receive an email from Shelterluv when this is completed.
5. Return to *Configuration* > *Integrations* and locate your new API key.
6. Complete the Shelter Pet Data Alliance steps starting on page 11.

Animal Shelter Manager Steps:

To enable the data feed from Animal Shelter Manager to the Shelter Pet Data Alliance (SPDA) database, you must first generate an API Key and obtain your Account ID that will be used as your credentials in SPDA.

Here are the steps that need to be taken to generate the API Key.

1. Log in to your Animal Shelter Manager account.
2. Go to Publishing > Set Publishing Options > API Keys and use the "key" parameter.
3. Set the dropdown option below to: json_monthly_stats

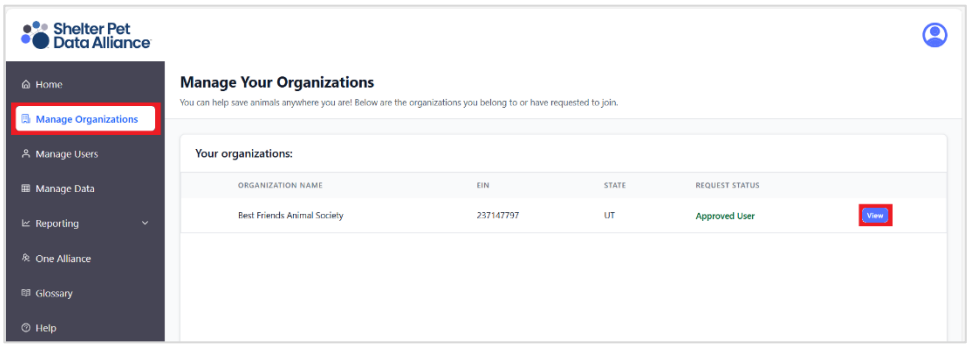
Here are the steps for obtaining your Account ID.

4. Log into your Animal Shelter Manager account.
5. At the top of your login screen or dashboard, you will see a 6-digit string in the format of xy1234.

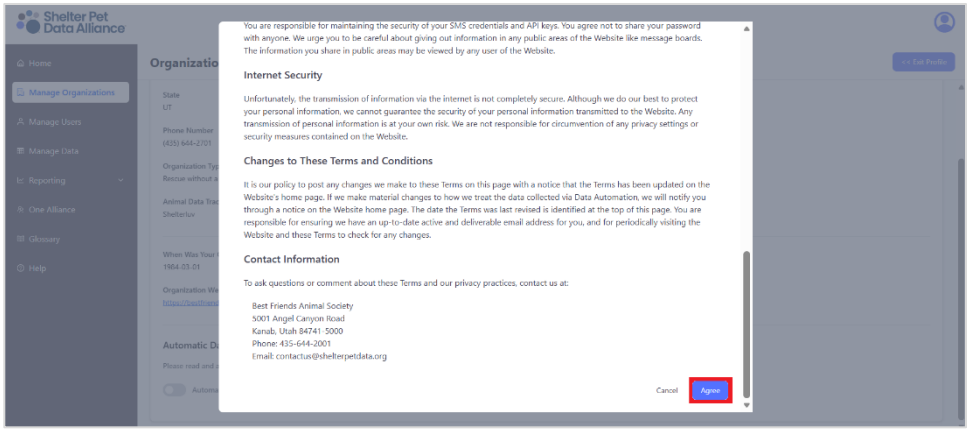
Shelter Pet Data Alliance Steps:

Complete the following steps in Shelter Pet Data Alliance to finish setting up automatic data sharing. *Note: Your user role must be Org Admin to follow these steps.

1. Click **Manage Organizations** from the left menu.
2. Click **View** to open your organization's profile.

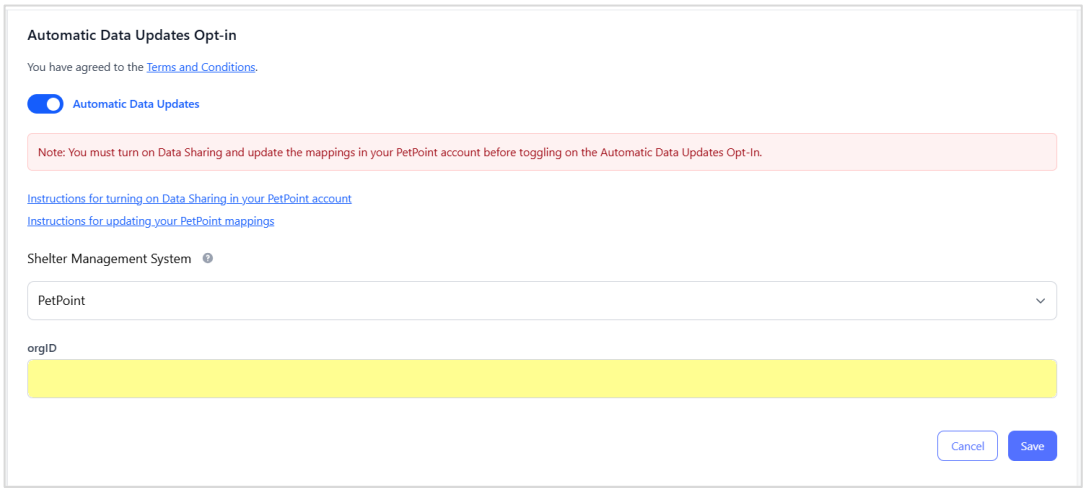


3. Scroll down to the **Automatic Data Updates Opt-in** section.
4. Click on the link for **Terms and Conditions**.
5. Scroll to the bottom and accept the terms by clicking the **Agree** button.

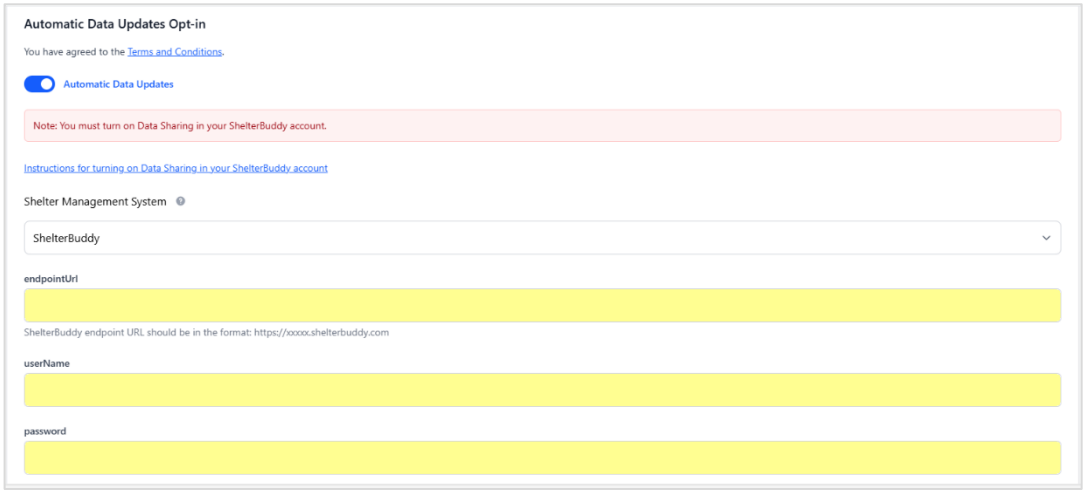


6. Select your **Shelter Management System** from the dropdown menu.
7. Complete the required fields then click **Save**.
    a. If you do not know the values for the required fields, you will need to contact your shelter management software company for support.
    b. If your credentials are entered correctly, you will receive a Success message.
    c. If you receive an error message, verify the information you provided is correct then click **Save** again.

Credentials for PetPoint include your PetPoint **orgID**.



Credentials for ShelterBuddy include **endpointUrl**, **username**, and **password**.



Credentials for Shelterluv include **API key**.



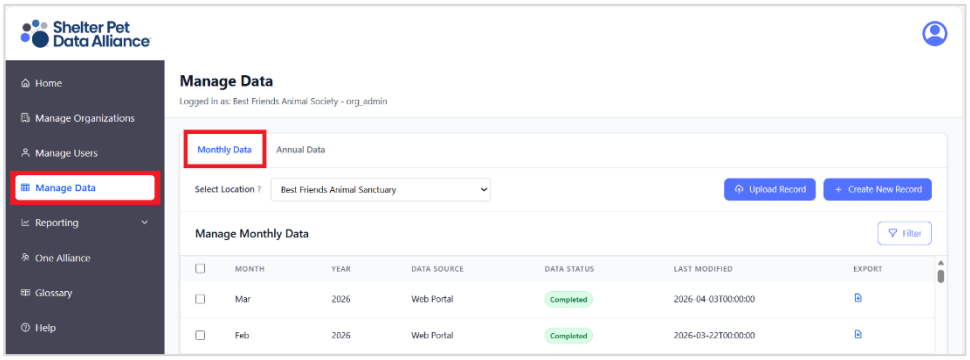
Credentials for Animal Shelter Manager include **API key** and **Account ID**.



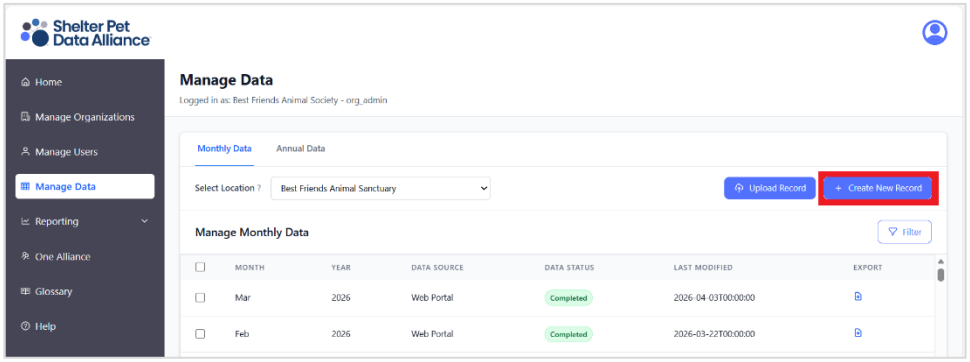
Creating New Records – Manual Reporting

Manually enter Monthly Data:

1. Click **Manage Data** from the left menu.
2. Manage Data will open on the **Monthly Data** tab first.



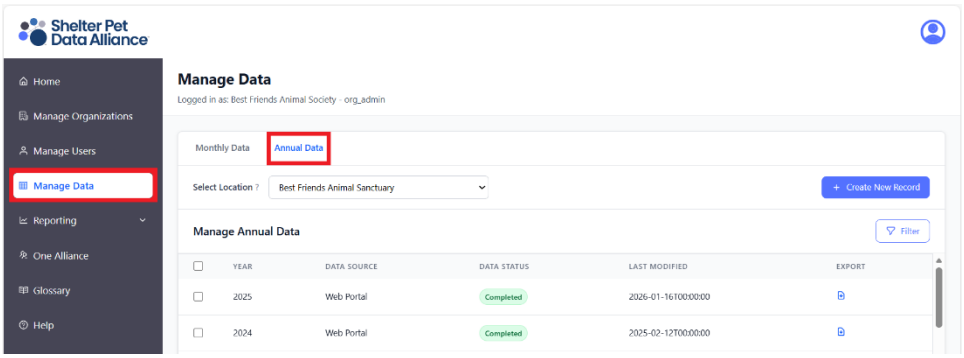
3. Click the **Create New Record** button located on the right side of the screen.



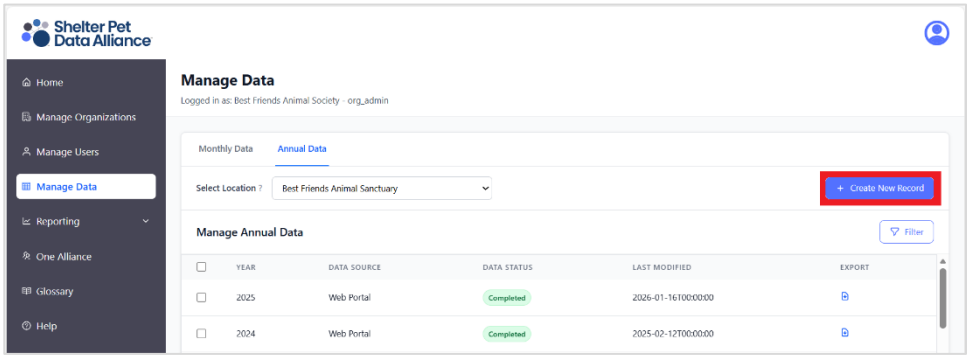
4. Select the *Month* and *Year* then click **Create**.
5. Populate all relevant fields with data for the month you selected.
6. Click the **Submit Record** button at the bottom of the screen.
7. The record will appear on the Manage Monthly Data list with a data status of Pending.
    a. If your EIN has been verified, the data status will change to Completed within four hours of submitting it.
    b. If you've created a new record before the EIN verification process is complete, the record will remain in Pending status until you receive the email notification that your EIN is verified. Any data you have submitted will change to Completed within four hours of receiving the EIN verification email and any future data you submit will change to Completed within four hours of submitting it.
8. If you manually enter or upload data for all 12 months in a calendar year, the system will automatically generate your annual file after the monthly records are in Completed status.

Manually enter Annual Data:

1. Click **Manage Data** from the left menu.
2. Click the **Annual Data** tab.



3. Click **Create New Record** on the right side of the screen.

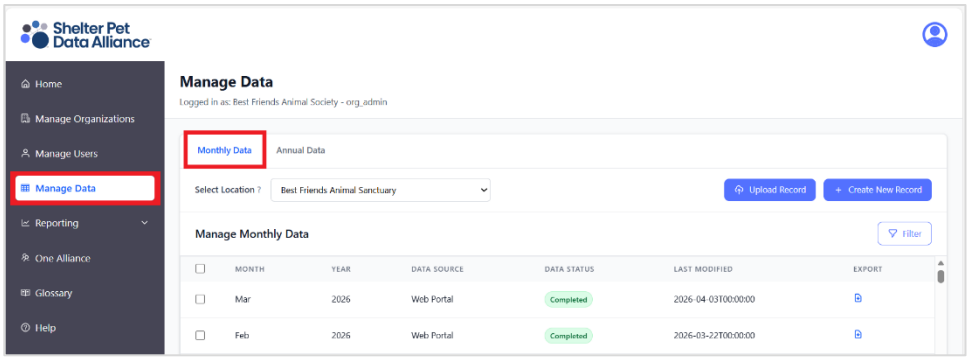


4. Select the *Year* then click **Create**.
5. Populate all relevant fields with data for the year you selected.
6. Click the **Submit Record** button at the bottom of the screen.
7. The record will appear on the Manage Annual Data list with a data status of Pending.
    a. If your EIN has been verified, the data status will change to Completed within four hours of submitting it.
    b. If you've created a new record before the EIN verification process is complete, the record will remain in Pending status until you receive the email notification that your EIN is verified. Any data you have submitted will change to Completed within four hours of receiving the EIN verification email and any future data you submit will change to Completed within four hours of submitting it.
8. If you manually enter or upload data for all 12 months in a calendar year, the system will automatically generate your annual file after the monthly records are in Completed status.

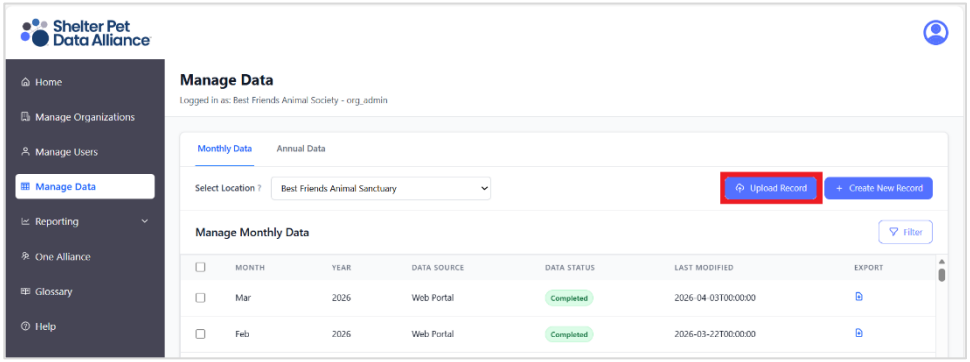
Creating New Records – Uploading CSV Files

If your shelter management software has a Shelter Animals Count (SAC) report, please follow these steps for uploading CSV files.

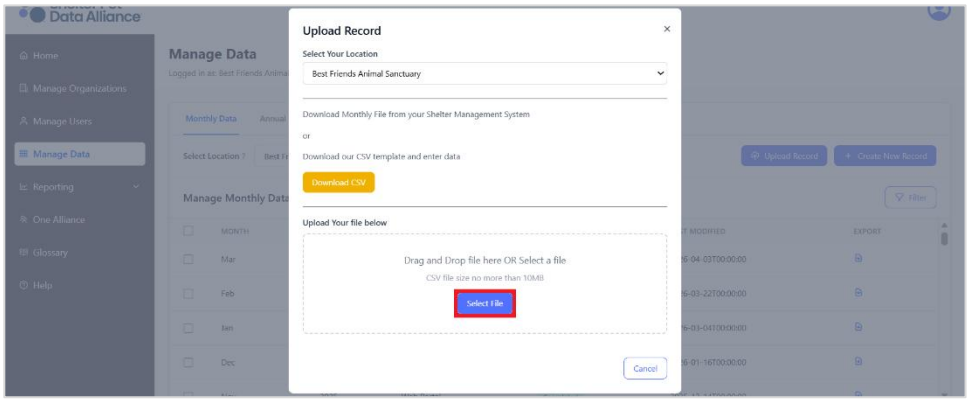
1. Using your SAC report, export monthly CSV files from your shelter management software.
2. Click **Manage Data** from the left menu.
3. Select the **Monthly Data** tab.



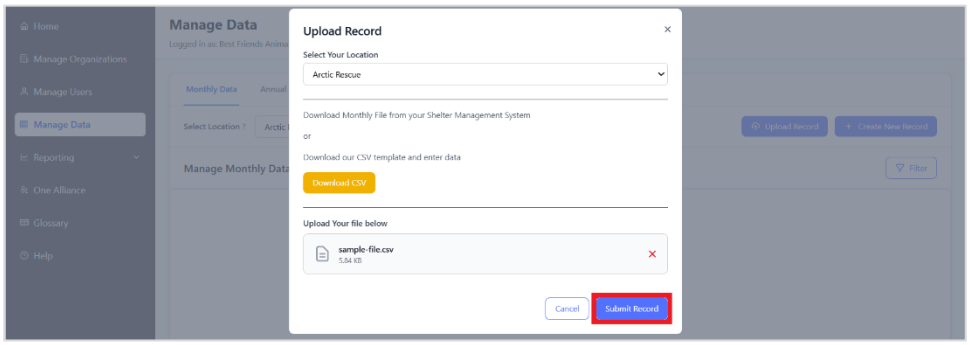
4. Click the **Upload Record** button.



5. Click **Select File** on the Upload Record popup.



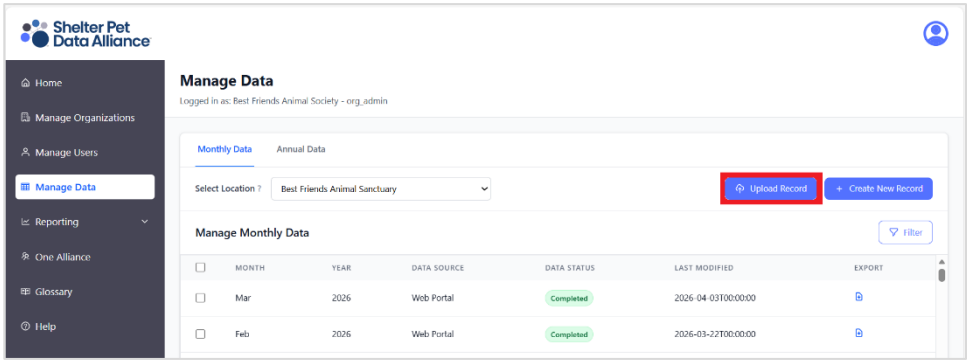
6. Locate and select the CSV file you saved to your computer during step 1.
7. Click **Submit Record** at the bottom of the Upload Record popup.



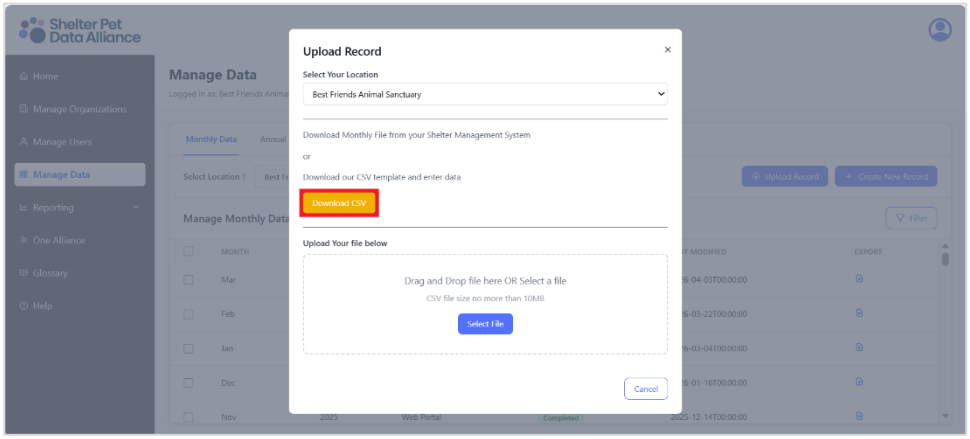
8. The record(s) will appear on the Manage Monthly Data list with a data status of Pending.
9. If you upload or manually enter data for all 12 months in a calendar year, the system will automatically generate your annual file after the monthly records are in Completed status.

If your organization does not have shelter management software or your shelter management software does not have the option to export CSV files, follow these steps to upload your data via CSV file or return to the Manual Reporting section of this document for manual entry instructions.

1. Click **Manage Data** from the left menu.
2. Select the **Monthly Data** tab.
3. Click the **Upload Record** button.



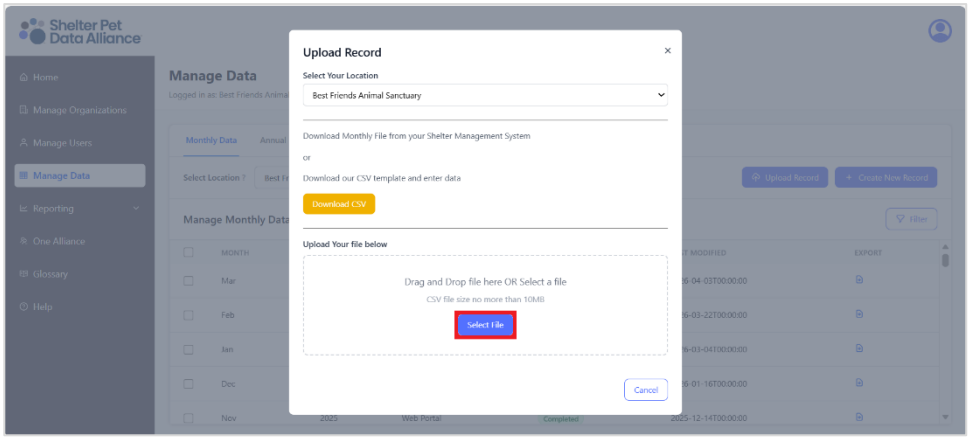
4. Click **Download CSV** on the Upload Record popup.



5. In the template, update the Record Year (column A) and Record Month (column B) to the year and month that corresponds with the data you are reporting. The Beginning Count Date (column BK) and the Ending Count Date (column BN) should be updated to the beginning and end dates of each month you are reporting for that year. Example: Here is what you would need to enter for January 2025. Column A: 2025; Column B: 1; Column BK: 1/1/2025; Column BN: 1/31/2025.

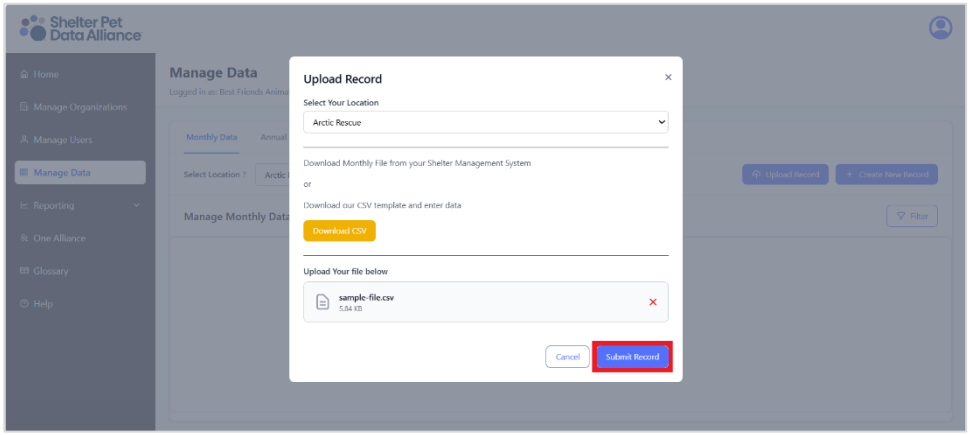
	A	B	C	D	E	F	G	H	I	BK	BL	BM	BN
1	Record Year	Record Month	Species	Stray At Larg	Stray At Larg	Stray At Larg	Relinquished	Relinquished	Relinquished	Beginning Count Date	Ending Count	Ending Foster Animal Count	Ending Count Date
2	2025	1	canine	0	0	0	0	0	0	1/1/2025	0	0	1/31/2025
3	2025	1	feline	0	0	0	0	0	0	1/1/2025	0	0	1/31/2025
4	2025	2	canine	0	0	0	0	0	0	2/1/2025	0	0	2/28/2025
5	2025	2	feline	0	0	0	0	0	0	2/1/2025	0	0	2/28/2025
6	2025	3	canine	0	0	0	0	0	0	3/1/2025	0	0	3/31/2025
7	2025	3	feline	0	0	0	0	0	0	3/1/2025	0	0	3/31/2025

6. Populate all applicable fields.
7. Save file to your computer.
8. Click **Select File** on the Upload Record popup.



9. Locate and select the CSV file you saved to your computer during step 7.

10. Click **Submit Record** at the bottom of the Upload Record window.



11. The record(s) will appear on the Manage Monthly Data list with a data status of Pending.
12. If you upload or manually enter data for all 12 months in a calendar year, the system will automatically generate your annual file after the monthly records are in Completed status.

Updating Incorrect Records

These instructions will help you update an incorrect record. You can either use a compatible CSV file or do a manual correction to update the incorrect month.

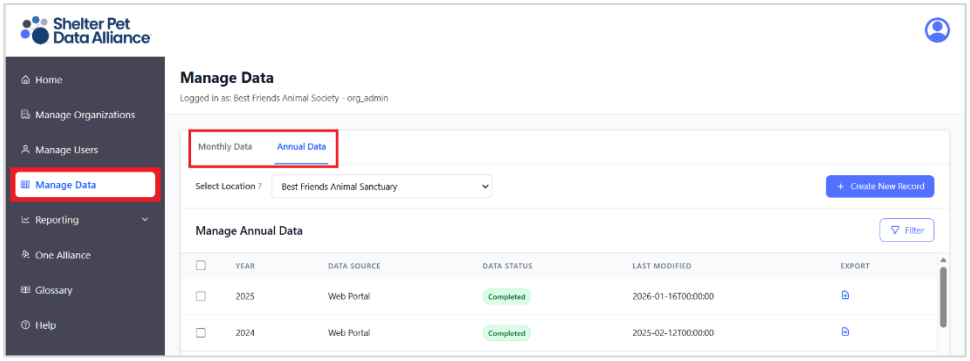
Upload CSV File to Update Incorrect Records:

Follow the instructions under the *Creating New Records – Uploading CSV Files* section of this document starting on page 15.

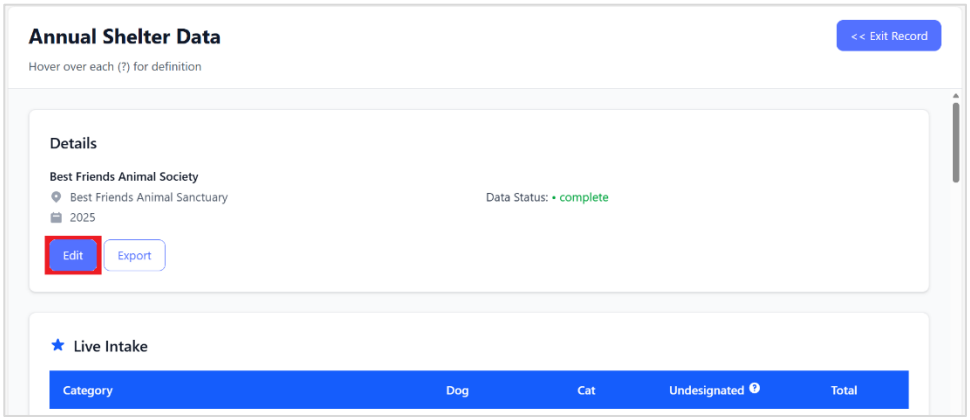
Manually Update Incorrect Records:

*Note: The record must be in Completed status before you can make any changes. The process to change from Pending to Completed usually takes around 4 hours after the data is submitted.

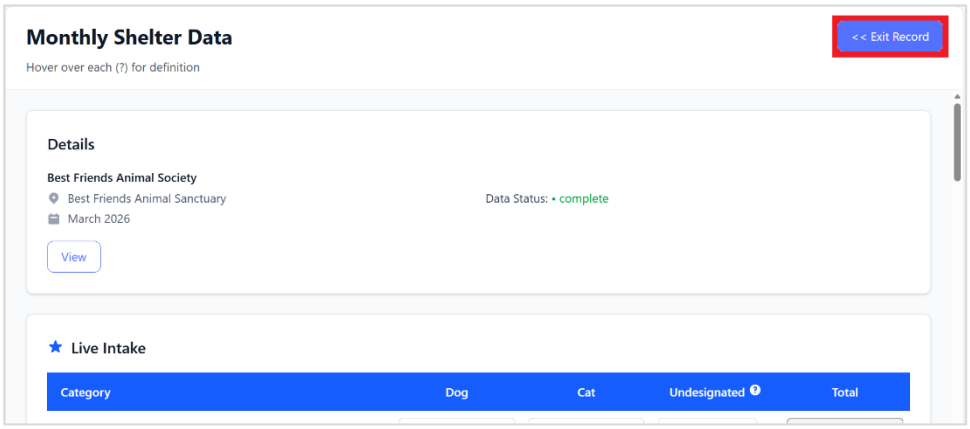
1. On the left side menu, select **Manage Data**.
    a. Select the **Monthly Data** tab to update a monthly record.
    b. Select the **Annual Data** tab to update a monthly record.

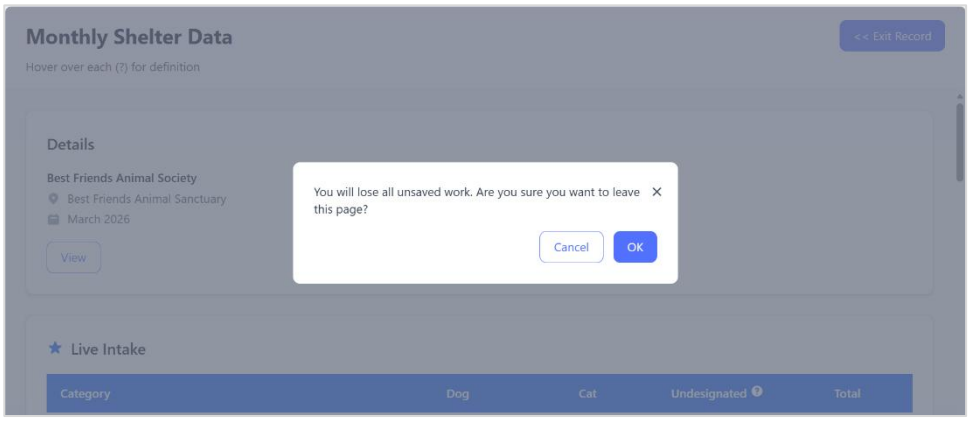


2. Find the record in the list then click on the record to open it.
3. Click the blue **Edit** button and make any necessary changes.



4. When finished with editing, click the **Submit Record** button at the bottom of the screen.
5. To exit the record without making changes, click the **Exit Record** button. A pop-up will appear stating “You will lose all unsaved work. Are you sure you want to leave this page?”
    a. Click **OK** to leave without saving changes.
    b. Click **Cancel** to stay on the page.





6. The updated record will appear on the list with a data status of Pending. The process to change from Pending to Completed usually takes around 4 hours after the data is submitted.

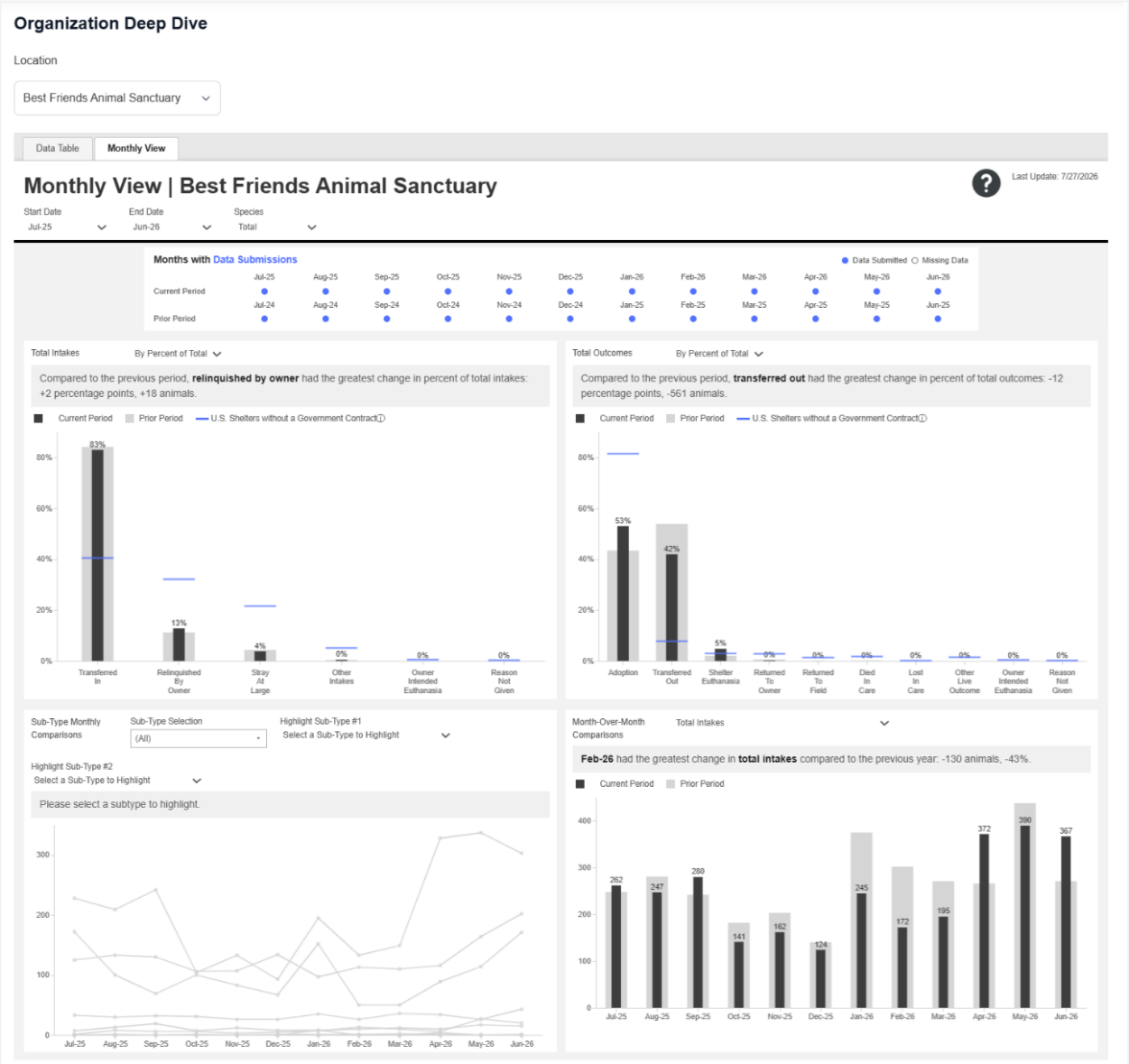
Reporting

The Organization Deep Dive Dashboard has two views:

1. *Monthly View*
2. *Data Table*

**Note: Best Friends Network Partners can request one-on-one time with our data analysts to review your organization's data and provide a better understanding of your reports.*

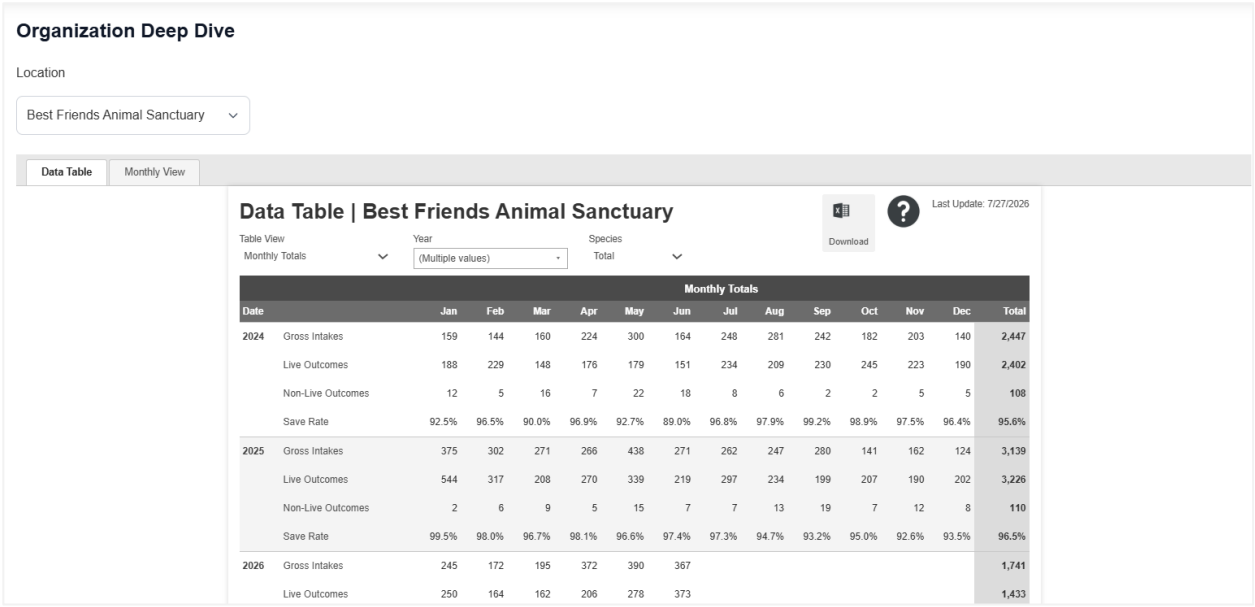
Monthly View:



The Monthly View allows users to view trends by intake and outcome sub-types, compare trends to all intake and outcome sub-types, and make national comparisons to organizations.

1. Click **Reporting** from the left menu.
2. Select the **Location**.
3. Select a **Start Date** and **End Date**.
4. Select the **Species**: Total, Cat, Dog, or Undesignated.
5. *Months with Data Submissions* section indicates which months have data submitted.
    a. Blue dots represent data submitted.
    b. Empty dots represent missing data.
6. *Total Intakes* section displays totals for each intake sub-type by volume or by percent of total for the selected timeframe.
    a. Totals from the current period are compared to totals from the prior period.
    b. Comparisons can only be made if the current period and prior period have the same number of months with submitted data.
    c. The dark gray bars represent totals from the current period.
    d. The light gray bars represent totals from the prior period.
    e. Select the "By Percent of Volume" option to add comparisons to all U.S. organizations with the same org type.
7. *Total Outcomes* section displays totals for each outcome sub-type by volume or by percent of total for the selected timeframe.
    a. Totals from the current period are compared to totals from the prior period.
    b. Comparisons can only be made if the current period and prior period have the same number of months with submitted data.
    c. The dark gray bars represent totals from the current period.
    d. The light gray bars represent totals from the prior period.
    e. Select the "By Percent of Volume" option to add comparisons to all U.S. organizations with the same org type.
8. *Sub-Type Monthly Comparisons* section displays one sub-type's volume compared to another sub-type's volume for the selected timeframe.
    a. Choose one, several, or all sub-types to provide context.
    b. Highlighted sub-type #1 is displayed in blue.
    c. Highlighted sub-type #2 is displayed in black.
    d. All other selected sub-types are displayed in gray.
9. *Month-Over-Month Comparisons* section displays the selected sub-type's monthly totals compared to the same month a year prior for the selected timeframe.
    a. The dark gray bars represent totals from the current period.
    b. The light gray bars represent totals from the prior period.

Data Table:



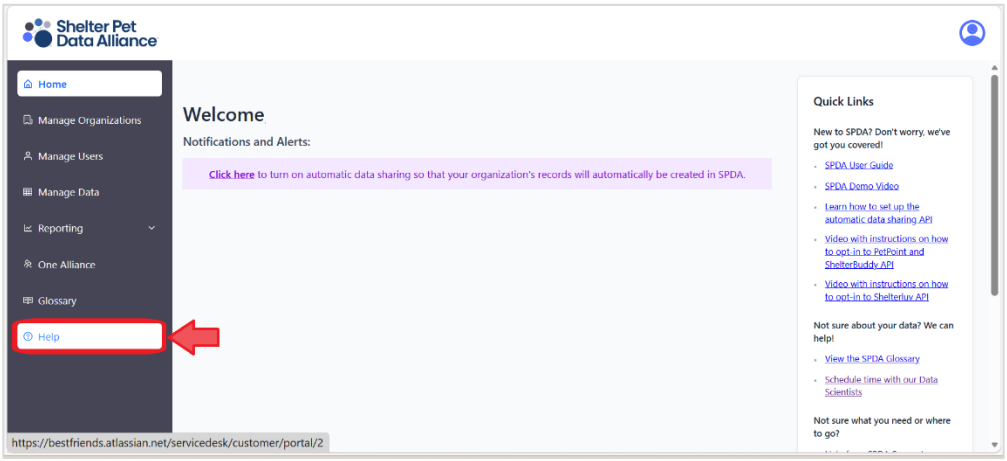
The Monthly View allows users to view the raw data, download the raw data, and see all monthly data and calendar year totals in one view.

1. Click **Reporting** from the left menu.
2. Select the **Location**.
3. Select the **Table View**: Monthly Totals or Intake & Outcome Sub-Types.
4. Select the **Year**.
5. Select the **Species**: Total, Cat, Dog, or Undesignated.
6. Click the **Download** icon to download the table in the view.

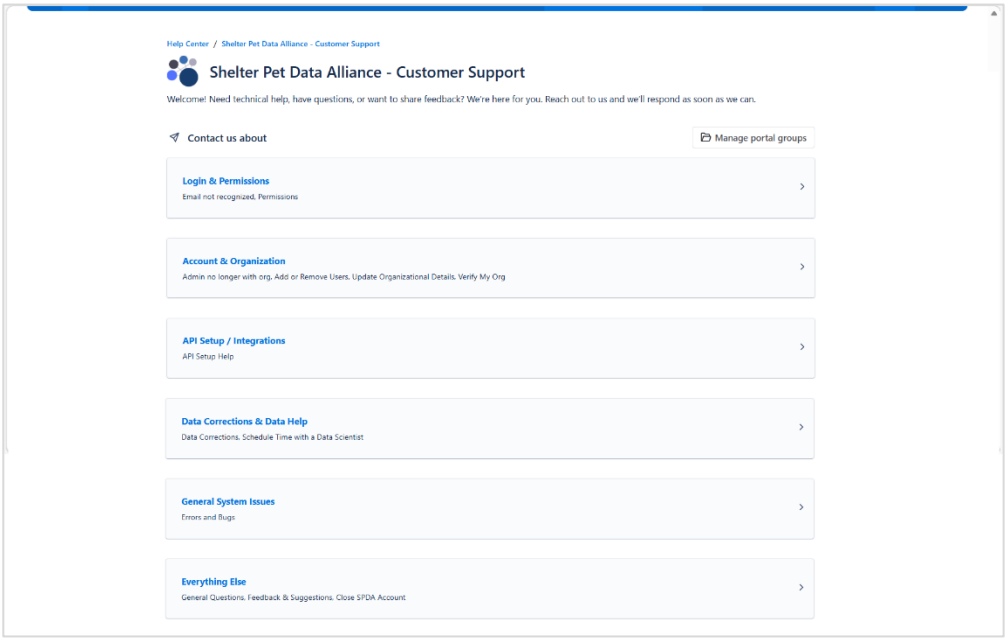
Submitting a Help Ticket

If you are logged into your Shelter Pet Data Alliance account:

1. Click **Help** on the left menu.



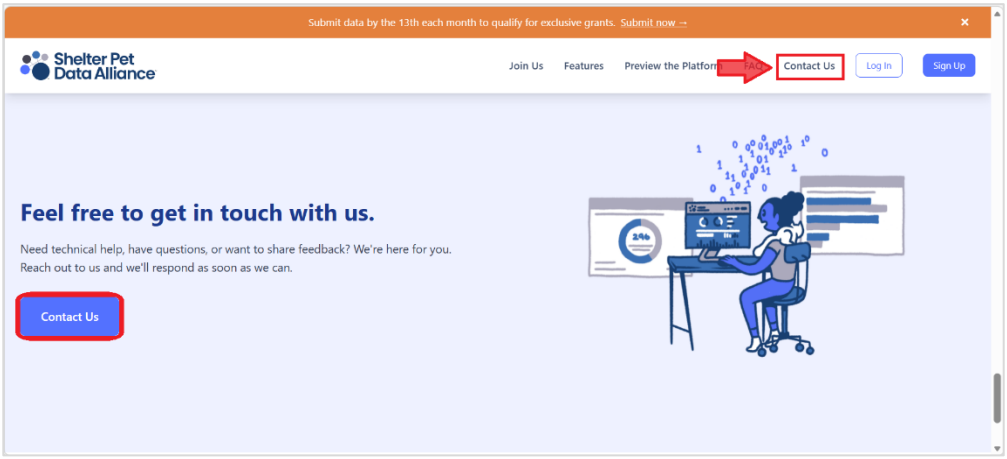
2. Shelter Pet Data Alliance – Customer Support opens in a new tab.
3. Select the option that best applies to your support request.



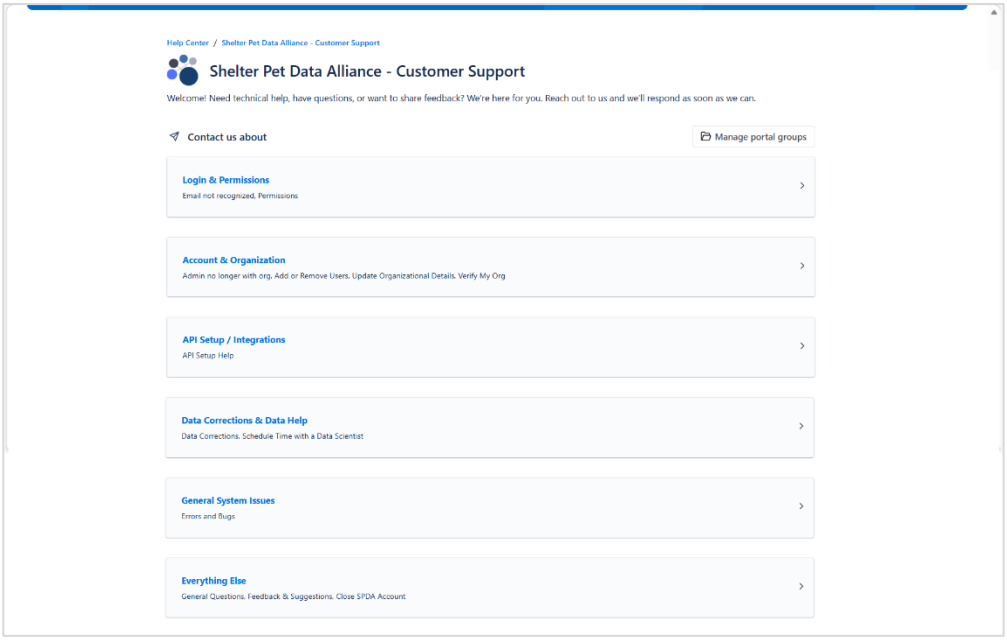
4. Complete the fields on the support request then click the **Send** button.

If you are not logged into your Shelter Pet Data Alliance account:

1. In your internet browser, type **shelterpetdata.org** in the address bar.
2. On the top right of the page, click **Contact Us**.
3. Click the **Contact Us** button at the bottom of the page.



4. Shelter Pet Data Alliance – Customer Support opens in a new tab.
5. Select the option that best applies to your support request.

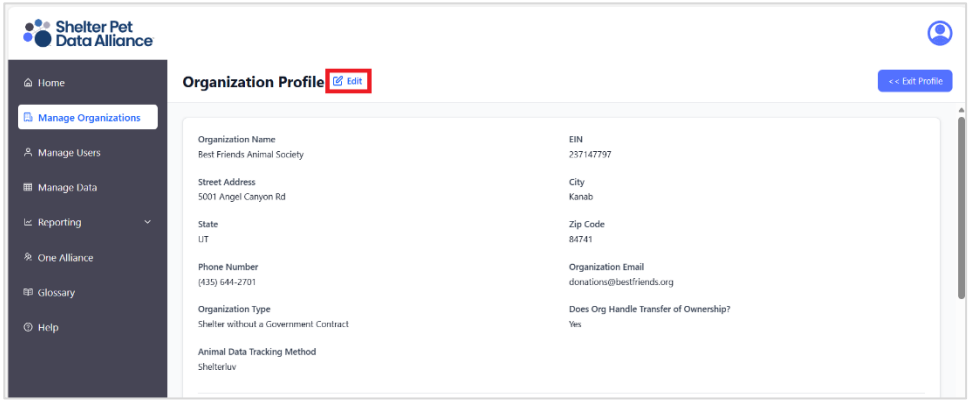


6. Complete the fields on the support request then click the **Send** button.

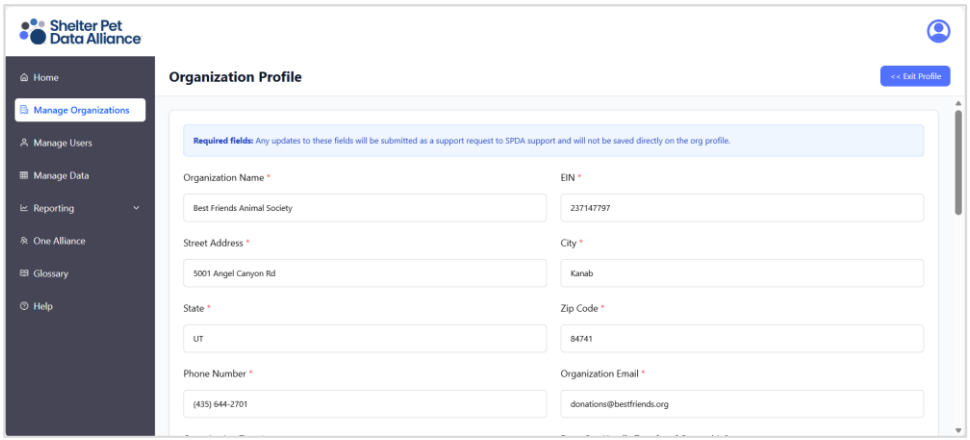
Updating Your Organization's Information

If your role is Org Admin:

1. Click **Manage Organizations** from the left menu.
2. Click **View** to open your org's profile.
3. Click **Edit** at the top next to Organization Profile.



4. Update the appropriate fields on the org profile. Any updates to the *Required Fields* section will be submitted as a support request to SPDA support and will not be saved directly on the org profile.



5. Scroll down and click **Save**.

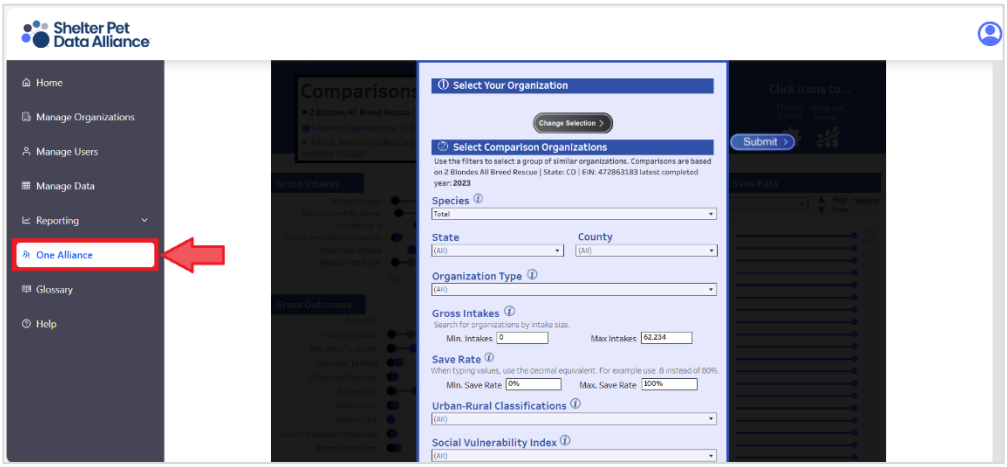
If your role is User:

Follow the instructions under the *Submitting a Help Ticket* section of this document starting on page 25. Please include all details of the organization updates in the **How can we help?** field.

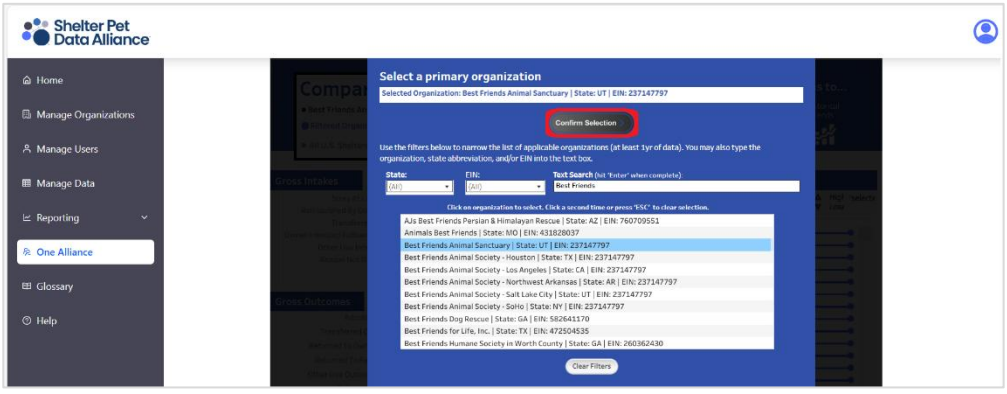
Using the One Alliance Comparisons Dashboard

One Alliance enables you to compare your organization's data directly to other organizations. Learn how you measure up by seeing and comparing your data side-by-side with 10,000 other shelters and rescues around the country.

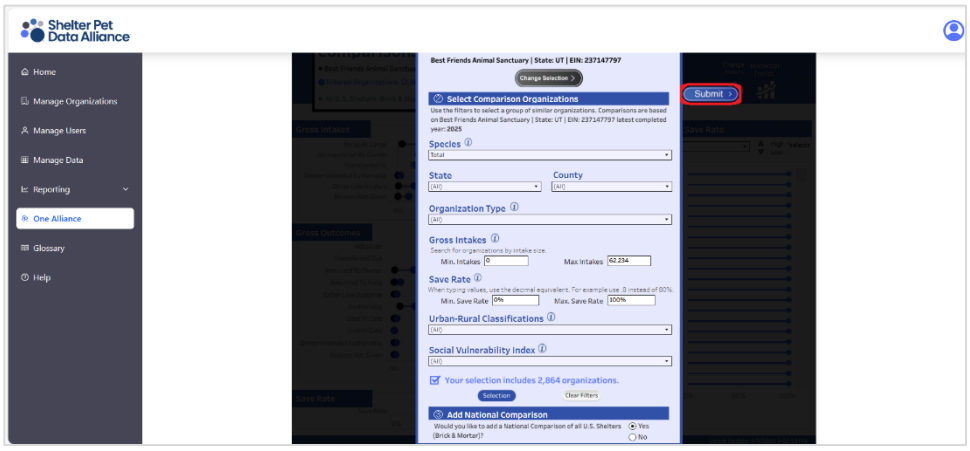
1. On the left side menu, click **One Alliance**.



2. Click **Change Selection** to select your organization.
3. Use the filters to find your organization by State, EIN, and/or Text Search.
4. Select your organization from the search box then click **Confirm Selection**.



5. Use the filters to select a group of comparison organizations. Filter options include Species, State, County, Organization Type, Gross Intakes, Save Rate, Urban-Rural Classifications, Social Vulnerability Index, and Selected Organizations.
6. Click No to exclude a national comparison. Otherwise, the default selection is Yes.
7. Click **Submit**.



8. One Alliance dashboard is displayed with the comparisons for your organization, your filtered organizations, and if selected, the national comparison.



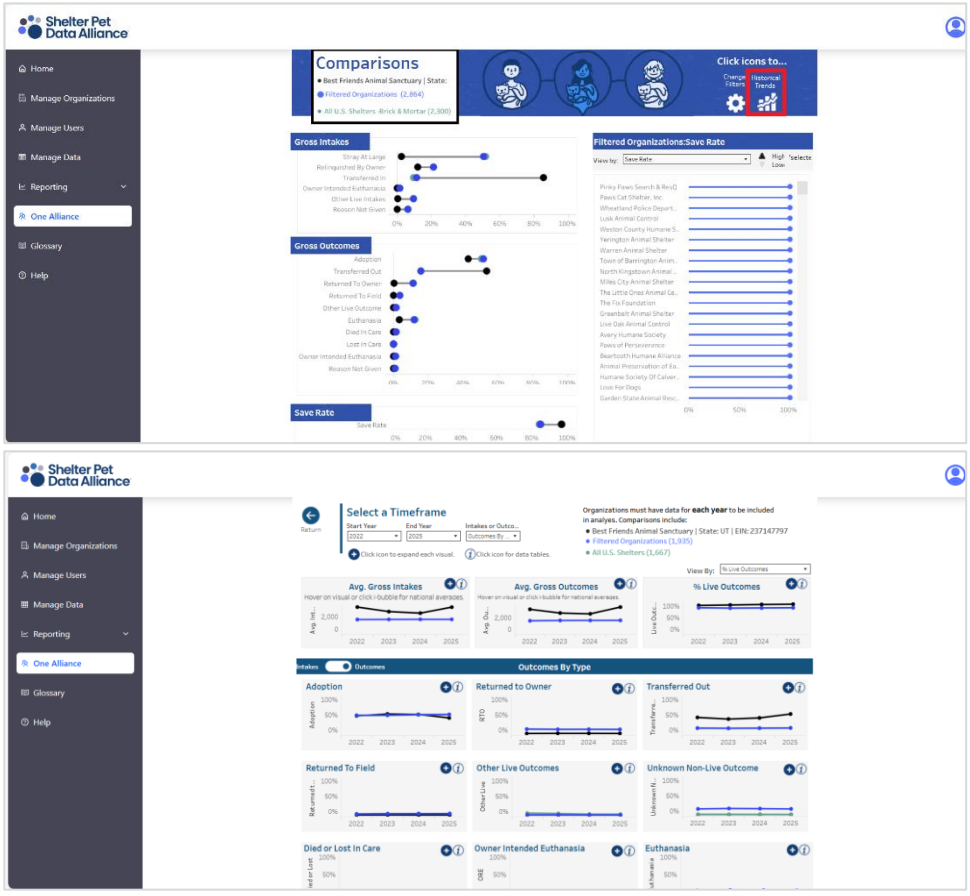
9. Hover your mouse over any data points to view the details for your organization, your filtered organizations, and if selected, the national comparison.



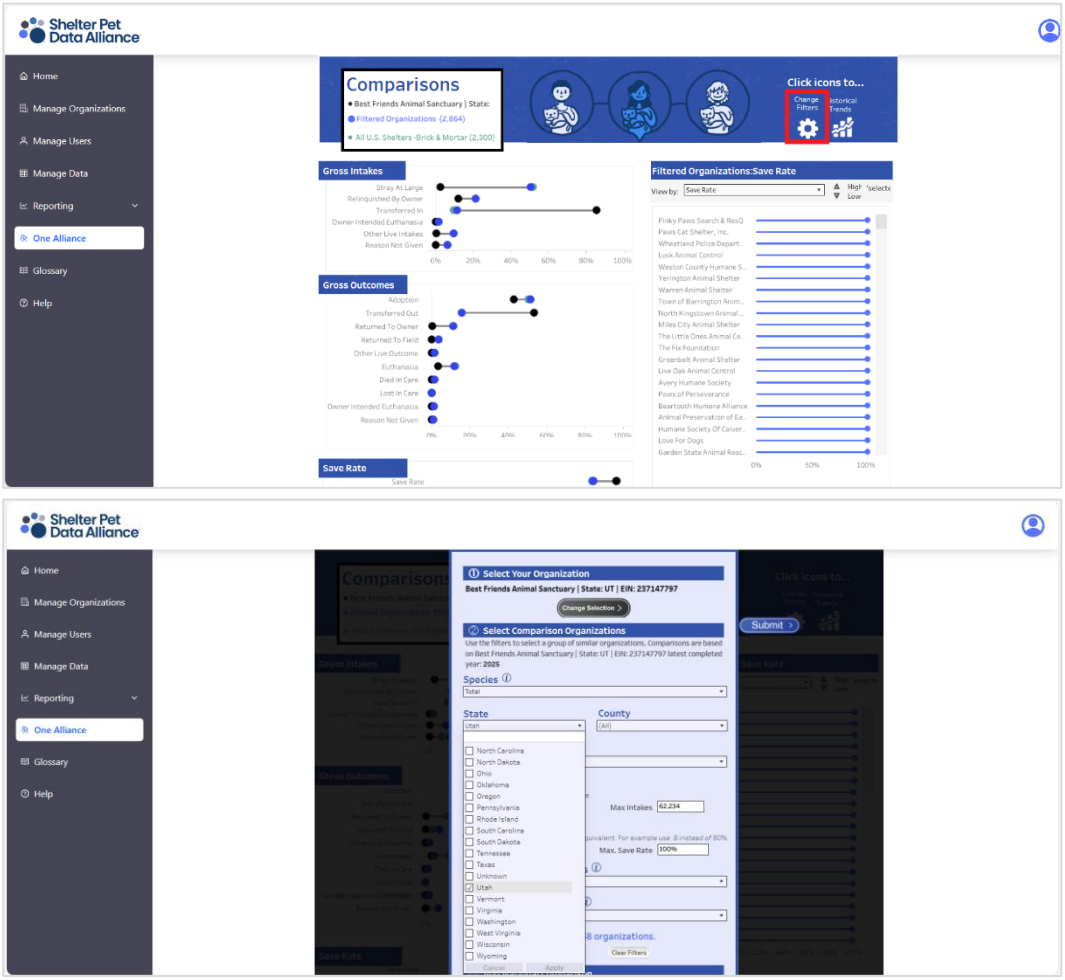
10. Each filtered organization is listed under *Filter Organizations* on the right.
    a. Select an option from the **View by** drop-down to view a different metric.
    b. Click **Highest** to sort in descending order. Click **Lowest** to sort in ascending order.



11. Click the **Historical Trends** icon to open historical tables dashboard. This view allows you to see if your organization consistently trends with comparison groups over time.



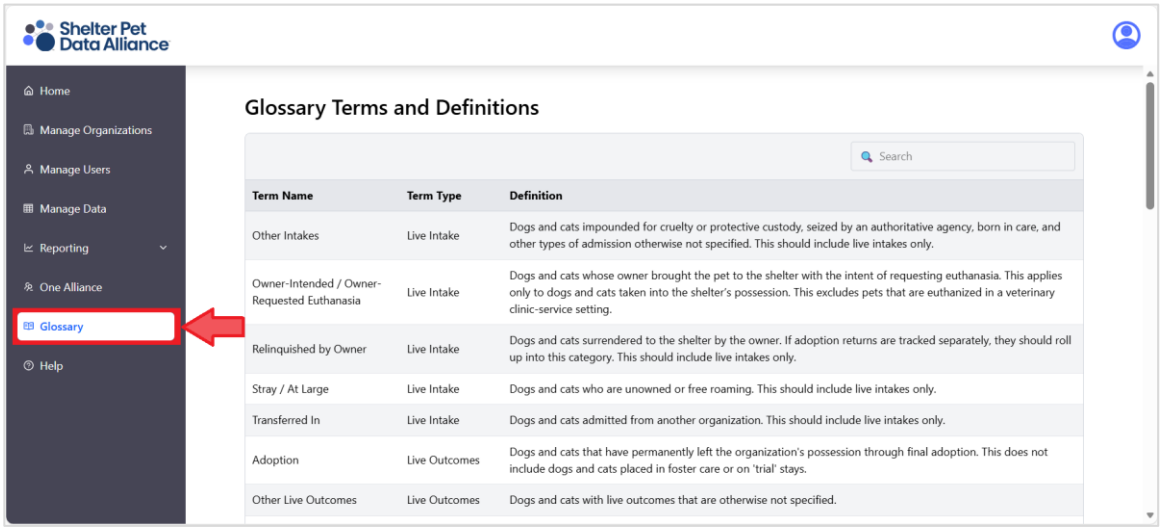
12. Click the **Change Filters** icon to change the filters for your comparison organizations.



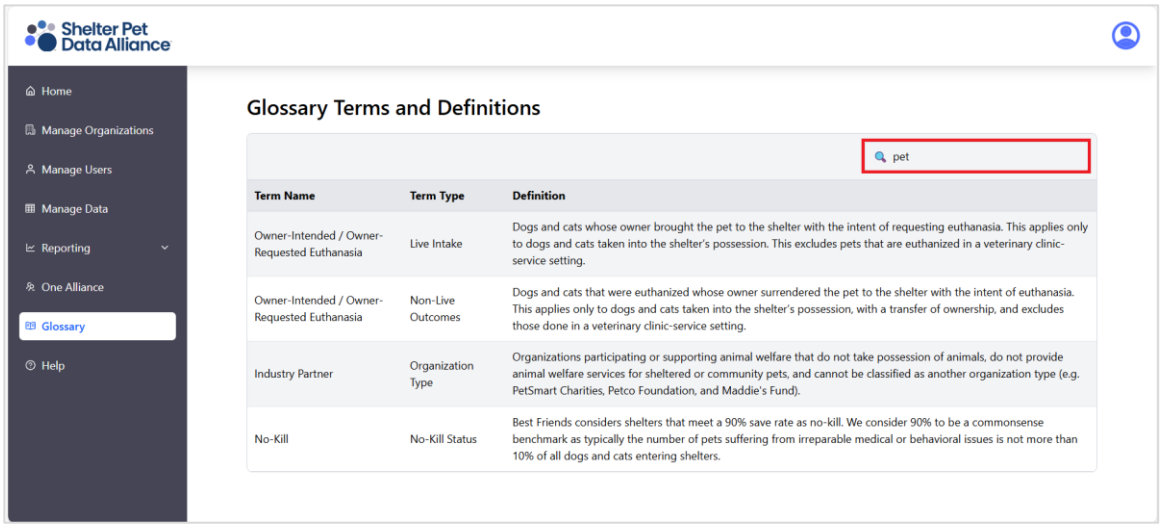
Using the Glossary

The Glossary lists terms and definitions referenced in Shelter Pet Data Alliance.

Each **Term Name** is grouped by **Term Type** then sorted alphabetically. The term types include Live Intake, Live Outcomes, Non-Live Outcomes, Organization Type, No-Kill Status, and Calculation.

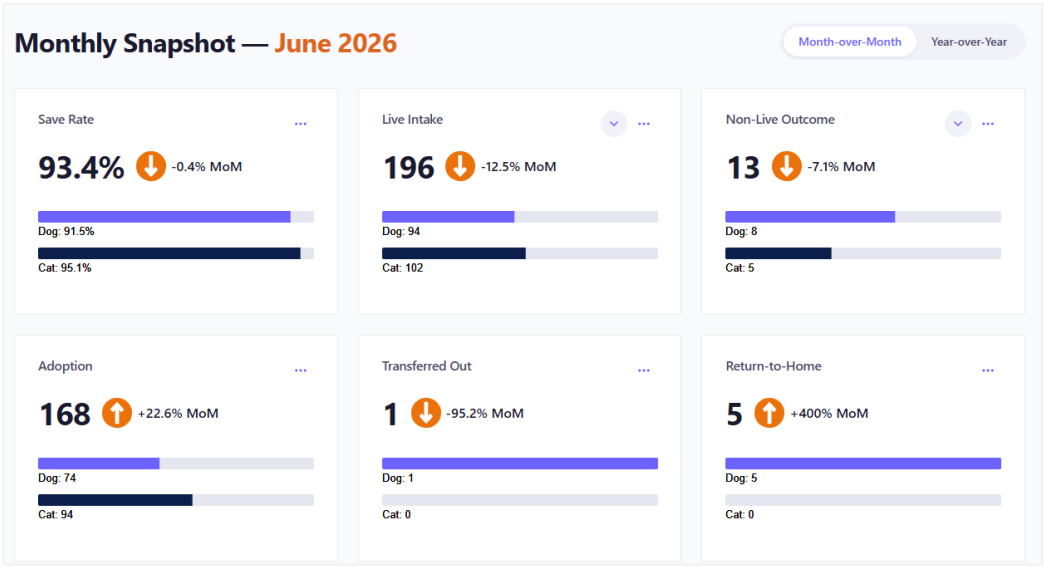


Use the **Search** box to search and filter by any key word.

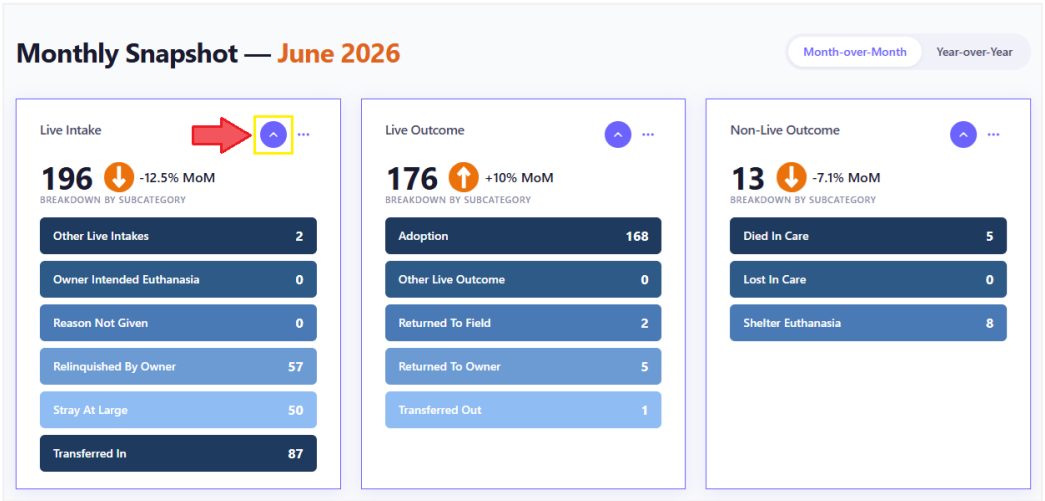


Viewing the Monthly Pulse Dashboard

The Monthly Pulse Dashboard displays metrics comparing month-over-month or year-over-year.



1. Click **Home** from the left menu.
2. Select the **Month-over-Month** or **Year-over-Year** option.
    a. *Month-over-Month* compares the monthly snapshot to the previous month.
    b. *Year-over-Year* compares the monthly snapshot to the same month of the previous year.
3. Expand *Live Intake*, *Live Outcome,* or *Non-Live Outcome* to view volume for each sub-type.



4. Change the metric displayed by clicking the three dots.

