

Receptionist User Guide - Provet Cloud

Online appointments are displayed in TWO different ways

MATCHED
(Existing Client + Existing Patient)

UNMATCHED
(New Client + New Patient)

- Email address and/or mobile no.
- Pet name

Are **MATCHING** in Provet Cloud

2:00 PM - 2:15 PM
John Doe
Tags: New client

Phone: +44 333 333 3213 *
Phone: +44 333 333 3998

Reason: My pet needs a consult.
• Tyler (76), Male, Dog, Bloodhound - Standard, 06/06/2019
• Tags: New patient

Julien Renard
- Vetstoria Limited
VETSTORIA - Tyler (Dog) - John Doe - 7788997777 - Consultation [Clinician : Julien Renard (Preferred Clinician)] - My pet needs a consult. - - [client : John Doe, patient : Tyler, email : john@vetstoria.com, phone : 7788997777]
Upcoming

John Doe
Phone: +44 333 333 3213 *
Phone: +44 333 333

No Further Action Required!

- Email address and/or mobile no.
- Pet name

Are **UNMATCHED** in Provet Cloud

1:00 PM - 1:15 PM
Reason: My pet needs his vaccination.
antoinette Baddiley
- Vetstoria Limited
VETSTORIA - Fluffy (Dog) - John Doe - 7778987777 - Vaccination [Clinician : antoinette Baddiley (Preferred Clinician)] - My pet needs his vaccination. - - [client : John Doe, patient : Fluffy, email : john@vetstoria.com, phone : 7778987777]
Upcoming

My pet needs his vaccination.

Establishing if the client is EXISTING or NEW

Criteria to check:

- Is this an **EXISTING** client using a different set of details? (e.g. partners email or phone)
- Is the Pet name different from the one on your account (eg Maise vs Maisy)

Existing Client
Actions to take:

Email address: Add this new address to Provet Cloud

Pet name: Modify spelling in Provet Cloud

Mobile No. Add this new mobile no. to Provet Cloud

New Client
Actions to take:

Email/Phone client to inform appointment details

Obtain the additional details necessary for the registration of the client

Note: When adding the client's phone number please ensure the country code is entered eg. +44