

Receptionist User Guide - Shepherd

Online appointments are displayed in TWO different ways

MATCHED
(Existing Client + Existing Pet)

UNMATCHED
(Unknown Client + Unknown Pet)

- Email + Phone number + Pet name
- Email + Pet name
- Phone number + Pet name

Are **MATCHING** in Shepherd

Appointment Details
10:00 AM - 10:15 AM UPCOMING

Fluffy Check In

Canine • Pomeranian • F • 1 Year Old • 06/01/2024

Reason for Visit
PetDesk Booking - Fluffy (Dog) - Consultation - My pet needs a consult. - - Mr. John Doe - john@vetstoria.com - 888778888 - 98102 -

Provider: Dr. Cindy Barnes | Appointment Type: Sick Pet

John Doe
(888) 777-8888
| john@vetstoria.com | 123 Lane | Seattle | Washington | 98102

Fluffy 10:00 AM - 10:15 AM
PetDesk Booking - Fluffy (Dog) - ...
John Doe UPCOMING Edit Appointment

When you hover over the appointment:
The Pet name is shown up top ("Fluffy")
and client details are shown below ("John Doe")

- Email + Phone number + Pet name
- Email + Pet name
- Phone number + Pet name

Are **UNMATCHED** in Shepherd

Appointment Details
01:00 PM - 01:15 PM UPCOMING

Reason for Visit
PetDesk Booking - Fluffy (Dog) - Consultation - My Pet needs a consult. - - Mrs. Jane Doe - jane@vetstoria.com - 8886668888 - 90871 -

Provider: Dr. Cindy Barnes | Appointment Type: Sick Pet

Fluffy 1:00 PM - 1:15 PM
PetDesk Booking - Fluffy (Dog) - ...
UPCOMING Edit Appointment

When you hover over the appointment:
The screen will look like the above screenshot.

On clicking **Edit Appointment:**

Appointment Status: Upcoming

Reason for Visit: PetDesk Booking - Fluffy (Dog) - Consultation - My pet needs a consult. - - Mr. John Doe - john@vetstoria.com - 888778888 - 98102

Date & Time: 23-Jun-2025 10:00 AM

Recurring: No

Provider: Dr. Cindy Barnes | Duration: 15 min

Appointment Type: Sick Pet

Client: John Doe
Email: john@vetstoria.com
Address: 123 Lane, Seattle, Washington 98102
Phone: (888) 777-8888

Patient: Fluffy
Canine • Pomeranian • F • 1 Year Old

Save Cancel Appointment

Note: The right hand side client and patient details are filled out.

On clicking **Edit Appointment:**

Appointment Status: Upcoming

Reason for Visit: PetDesk Booking - Fluffy (Dog) - Consultation - My Pet needs a consult. - - Mrs. Jane Doe - jane@vetstoria.com - 8886668888 - 90871

Date & Time: 23-Jun-2025 01:00 PM

Recurring: No

Provider: Dr. Cindy Barnes | Duration: 15 min

Appointment Type: Sick Pet

Client: Search [] New Client

Patients: Add patients [] New Patient

Notes []

History []

Save Cancel Appointment

Note: The right hand side client and patient details are not filled out.

John Doe Remove

Email: john@vetstoria.com

Address: 123 Lane
Seattle, Washington 98102

Phone: (888) 777-8888

0 Canceled 0 No Show

Patients New Patient

Fluffy X

Fluffy
Canine • Pomeranian • F • 1 Year Old Check In Remove

No reminders

Notes

History

Cancel Appointment

No Further Action Required

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:

Pet name - Modify spelling in Shepherd

Email address - Add this new address to Shepherd

Mobile No. - Add this new mobile no. to Shepherd

New Client

Actions to take:

Email/Phone client to inform appointment details

Obtain the additional details necessary for the registration of the client