

ONLINE BOOKING

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HOW IT WORKS

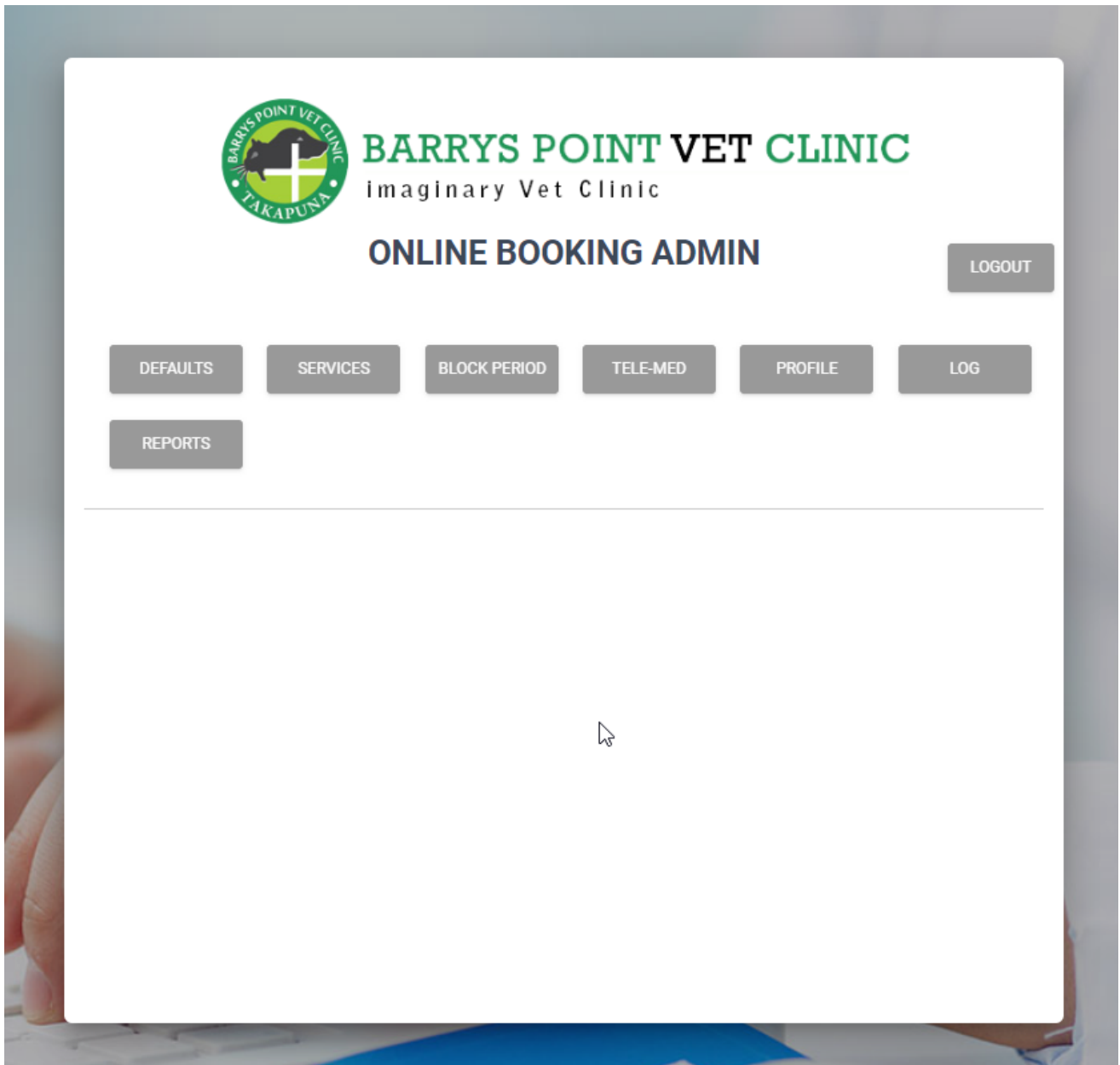
VetlinkPro's cloud based online booking system has been developed to operate with 'live' integration to the VetlinkPro in-clinic Diary system. In the web setup section, the clinic is able to select appointment reasons that are allowed to be booked by clients on the web. The appointment reasons can also be categorised and renamed on the web module independently. This is what clients want today – total freedom to search for available appointment times online, and not be put on 'hold', let alone get a 'clinic closed' message when it is a more convenient time for them, such as at night.

Once set up and activated, the cloud application resides on our secure server with a secure connection to the VetlinkPro server or main PC at your clinic. The booking system can be a link on your existing web site or you may provide a direct link in your email or SMS correspondence to the client. When they click on the link they will be provided with a login screen. If they forget their password, they can get it sent to them by the 'Forgot Password' link thereby making this system maintenance and hassle free for the clinic.

By logging onto a secure SETUP area, the clinic can fully configure special ONLINE CATEGORIES and Appointment REASONS allowed to be booked on their system.

ONLINE SET UP OPTIONS

1. Open your internet browser (Internet Explorer, Mozilla Firefox, Google Chrome etc.).
2. Go to <https://onlinebooking.VetlinkPro.com/admin> and enter your username and password, then press 'enter' or click '**LOG IN**'.



Defaults

Enabled Appointment Type	You can choose whether online booking can be used for In Clinic appointments only, Telemedicine appointments only or both .
Allow staff selection	Setting this to 'Yes' allows clients to select a preferred staff member when making their appointments
Multiply Time for Multi Patients	Setting this to yes will multiply the appointment time by the number of patients as selected on online booking screen. If a client select a 20 min consult but sets number patients to 2, a 40 min time slot will be searched for.
Apts per IP per hour	This is the number of appointments that can be made per hour from one IP address (each time you connect to the internet you are given a unique IP address). Setting this low will help stop multiple spam clients being created from one computer.
Bookings allowed after	This setting controls how many days ahead a client must make their booking, 0 being today, 1 tomorrow etc.
Booking Successful On Screen Message	The message that is displayed when a booking is successfully submitted to VetlinkPro for in-clinic appointments.
Booking Successful Email Message	The message that is emailed when a booking is successfully submitted to VetlinkPro for in-clinic appointments.
Telemedicine Booking Successful On Screen Message	The message that is displayed when a booking is successfully submitted to VetlinkPro for telemedicine appointments.
Telemedicine Booking Successful Email Message	The message that is emailed when a booking is successfully submitted to VetlinkPro for telemedicine appointments.
Booking Failed Message	The message that is displayed when there is an error trying to book the appointment.
Promotion Image	This image is shown at the booking successful screen and will need to fit the width of the white space area in order to align properly.

Services

Inside this tab, VetlinkPro loads your Appointment Reasons into the left column, and allows you to choose which you would like to be available for online booking in the right column.

1. Select the Reason inside the left column and click the '>'. The Reason will now show in the right column and be enabled for online booking.
2. To remove a Reason from online booking, click the 'x' button on the right.
3. To add client instructions to a specific Reason, select your Reason from the right column then select **'EDIT'** at the bottom in the Service Details area and fill in your instructions. This text will then display to a client in big red letters when they are selecting a time slot for their appointment.
4. Settings whether the reason is a telemedicine, in-clinic appointment or both can be set by clicking the edit button as well.

Block Period

This screen is for blocking out periods of time in the diary if a staff member is unavailable to work.

1. Select your choice of week day from the **'Week Days'** drop-down menu to view which days you have 'block out periods' on.
2. To add a new 'block out period', click the **'+ Add a new block period'** button.
3. This area has customizable column positioning. You can click and drag any of the three columns (Staff, From, To) into any order you prefer.
4. Select a staff member from the **'Staff'** drop-down, enter the **'From'** time manually or click the clock icon on the left to select a time and set whether the Block is for in-clinic, telemedicine or both appointment types.
5. Once you have configured the 'block out period', select either the tick or cross to save or cancel the changes you are making.
6. To edit a 'block out period', click on the pencil icon to the left of the desired staff member. This takes you to the configure screen where you can change the 'staff member', 'from' time and 'to' time.
7. To delete a 'block out period', click on the **'x'** to the right of the desired staff member.

Telemedicine

These setting let you assign staff members to a telemedicine host so telemedicine bookings can be made for them.

Click the **Add Staff** button, then select from one of the hosts available.

Note: Zoom user lists get populated from the hosts you emailed to CFL when configuring your zoom account.

Profile

These settings configure your profile for logging into the set up portal.

Login Email	The email address you log in to Online Booking Setup with
Password	The password you use to log in
First Name	The first name of the clinics online booking manager.
Last Name	The last name of the clinics online booking manager.
Contact Email	The email that online booking will contact

Log

This section shows a log of everything that happens inside your online booking portal, both on setup and client-side. You can configure the date filter to show any period of time, and are able to choose what type of event you are looking for (Appointment Made, Login, Searched Time Slots etc.).

Simply set the 'From' and 'To' dates, select the event and click **'View'**.

Reports

The Reports tab allows you to view statistical bar graphs of client activity for online booking. Similar to the Log tab, you can filter by date range, but also view graphs in 'Weekly', 'Monthly', and 'Yearly' format:

Total Bookings	The total amount of bookings made in the week, month or year over the date range you have chosen .
Week Day Bookings	The total number of bookings for each week day within the date range you have chosen. E.g between Jan 1 st and July 1 st , Tuesday has been the most popular with 150 bookings.
Booking Success	A graph that presents statistics on successful bookings from the date range you have chosen in either 'Weekly', 'Monthly' or 'Yearly' format. Orange represents how many times 'Time Slots' were searched, Yellow represents how many times 'Time Slots' were selected, and Green represents how many times an appointment was made.
Popular Times	A graph of time slots in a day where the most bookings are made. E.g 7pm is a popular time as most people have gotten home from work by then.

VETLINKPRO SETUP OPTIONS

Staff Configuration

1. For clients to make online bookings against a staff member in the diary they must first be allocated to that diary through the roster.
2. Next you must tick the **'Allow on Web'** flag from the staff record under the **'Staff'** tab.
3. Once enabled for online booking, you can then assign Appointment Reasons to that staff member for clients to select when booking online. If no reasons are selected it means they can be booked for all reasons (provided they have been selected in the online setup). These can be added from the Staff record under the **'Staff'** tab and **'Reasons Allowed for Staff'**.

Diary Configuration

1. Select the diary that online bookings can be made for from **Options | Setup | Diary | More Options | Diary to Lookup** when making online bookings.
2. Configure the confirmation email/SMS that will be sent once the booking is confirmed by clinic staff from **Options | Setup | Diary | Email Appointment Confirmation / SMS Appointment Confirmation**.

Note: The email/SMS is sent from VetlinkPro so your outbound mail settings will need to be configured or you will need to be set up with the SMS module. Also for clients to receive the confirmation email/SMS they will need to have Apt confirm ticked in their client record under the Marketing tab | Send by Email / Send by SMS | Apt Confirm.

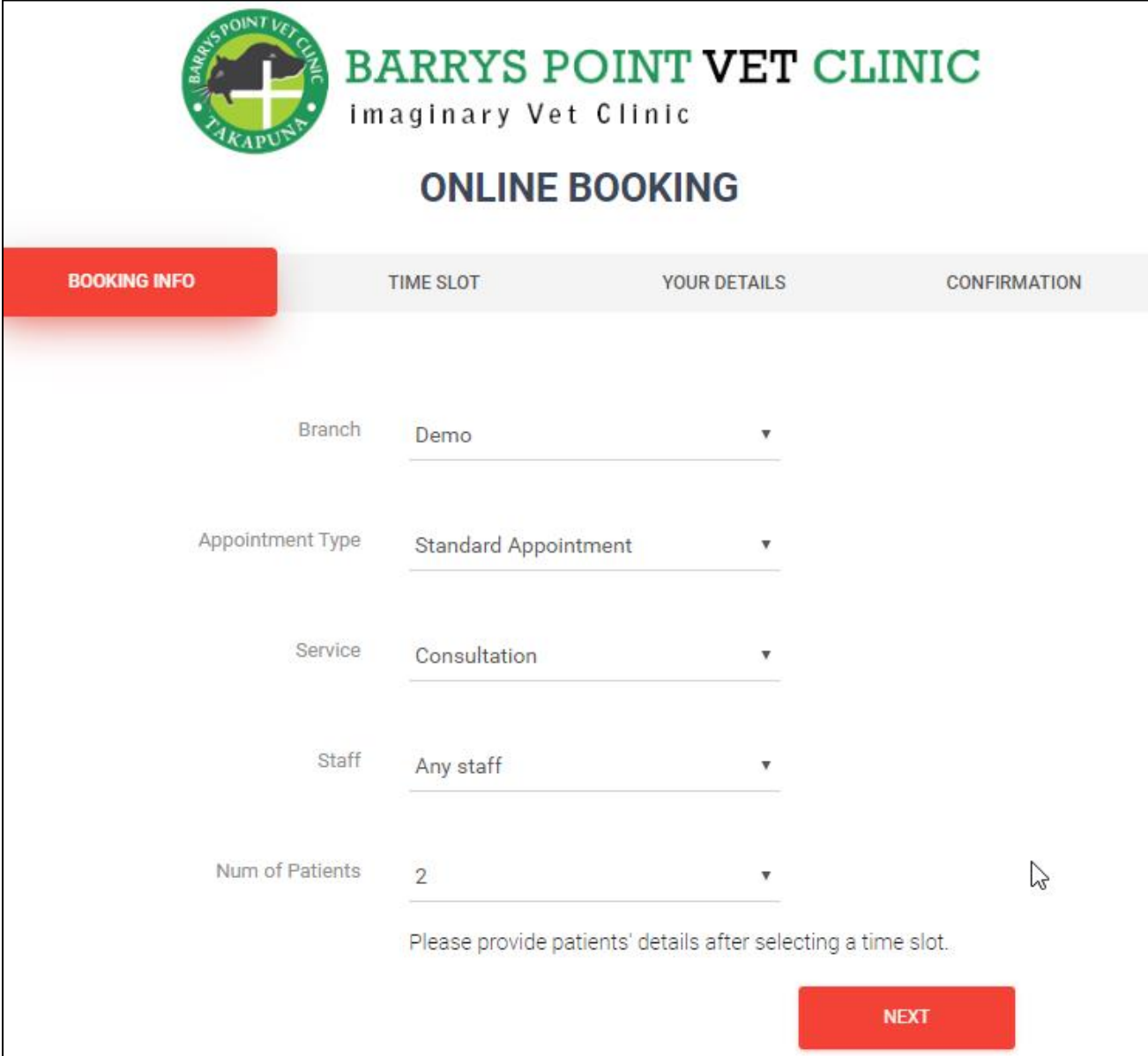
CLIENT INTERFACE

Making a booking as Guest

Step 1: Booking Info

Here you can select a;

- **Branch:** (all your branches will show in this list, there is no option to only show some),
- **Service:** which will have options provided from your choices of 'Appointment Reasons' on the setup side, and then your
- **Staff:** also as per options provided from your choices on the setup side.
- **Num of Patients:** How many patients are being brought in for this visit.



BARRYS POINT VET CLINIC
imaginary Vet Clinic

ONLINE BOOKING


BOOKING INFO	TIME SLOT	YOUR DETAILS	CONFIRMATION
Branch	Demo	▼	
Appointment Type	Standard Appointment	▼	
Service	Consultation	▼	
Staff	Any staff	▼	
Num of Patients	2	▼	

Please provide patients' details after selecting a time slot.

NEXT

Step 2: Time Slot

Now you can choose a time slot from the days available. Times and dates shown reflect the 'Bookings allowed after' setting configured in setup. Clicking on a time slot will proceed the booking to the next stage. Above the time selection box is where you will see any Client Instructions you have added to the Appointment Reason that the client has selected. In this example, 'Ear Issues' was selected as a Reason.



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ONLINE BOOKING

BOOKING INFO
TIME SLOT
YOUR DETAILS
CONFIRMATION

ⓘ If your pet is on medication, please do not dose on day of appointment.

◀ ▶

📅 08 Nov 18 - 10 Nov 18

	Thu 08	Fri 09	Sat 10
Ms. Penelope Pittstop	15:15	08:00	09:00
	15:45	08:15	09:15
	16:15	08:30	09:30
	16:30	08:45	09:45
	19:15	09:00	10:00
	19:30	09:15	10:15
	19:45	09:30	10:30
		09:45	10:45
		10:00	11:00
		10:15	11:15

BACK

Scroll down to see more available staff.

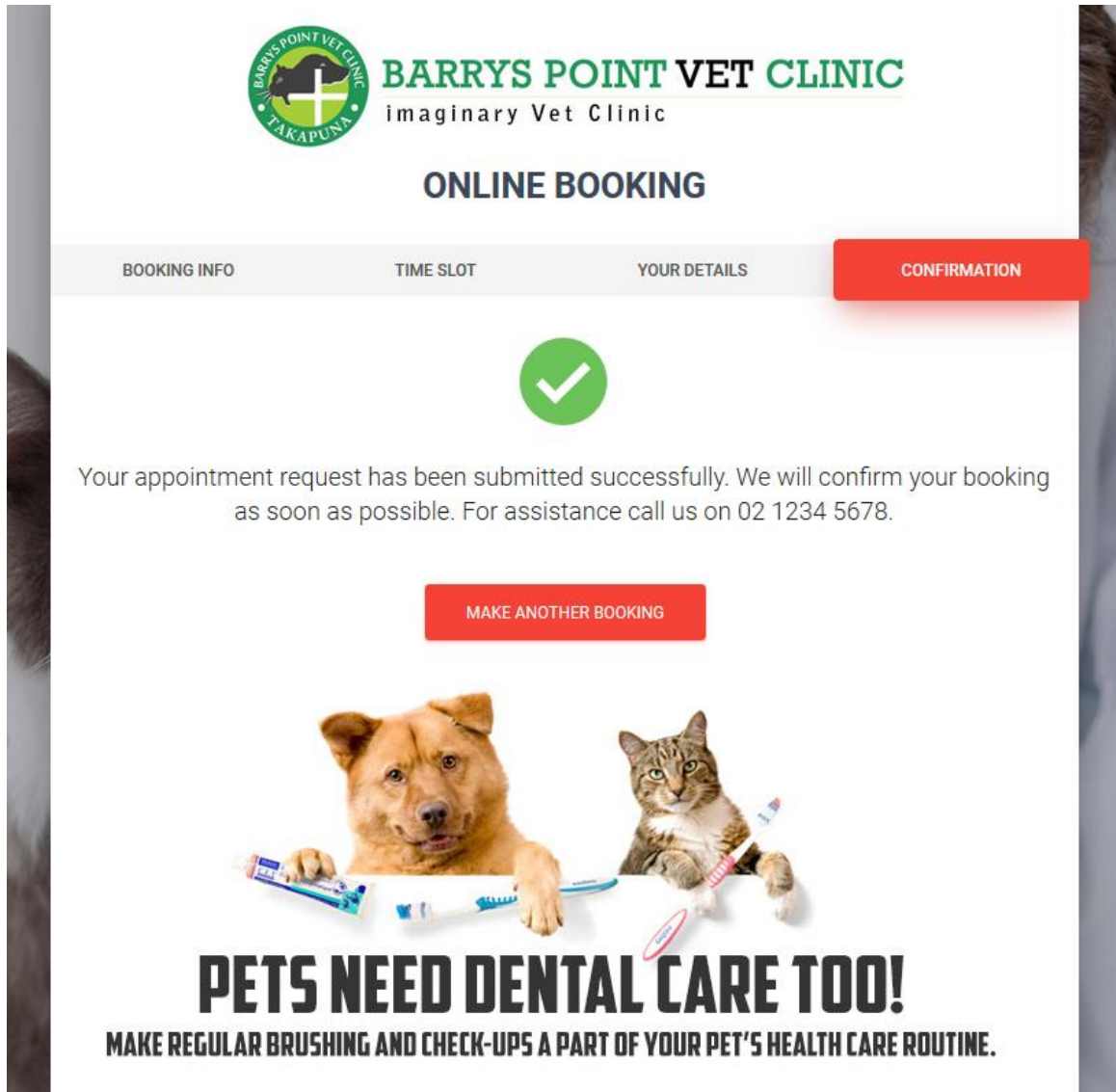
Step 3: Your Details

1. For new clients, they must provide:
 - Whether they are new client, First Name, Last Name, Phone, Email, Patient Name ,Species (chosen from the drop-down menu)
2. If they need to book for more than one pet, they may enter the additional patients details in the 'More Patients' field. Inside this field they will see that that patients name, species and reason for booking is needed.
3. If they feel the clinic needs to be made aware of anything special about their patient, for example, "Fluffy bites when she's nervous", they may add that information in the 'Notes' field provided under their details.
4. After they have entered their details, they must fill in the 'Captcha' field (a simple security measure to prevent spamming) and then click '**NEXT**'.

The screenshot shows a web form titled 'YOUR DETAILS' with a progress bar at the top containing 'BOOKING INFO', 'TIME SLOT', 'YOUR DETAILS', and 'CONFIRMATION'. The form includes a 'Continue as a Guest or LOGIN' link. The fields are: 'New Client?' (Yes), 'First Name' (Joe), 'Last Name' (Bloggs), 'Phone' (09 4892280), 'Email' (support@cfl.co.nz), 'Patient Name' (Fluffy), 'Species' (dropdown), 'More Patients' (text area with placeholder 'Enter name, species & reasons here'), 'Notes/Address' (text area), and 'Captcha' (image with code '600' and a text input field). 'BACK' and 'NEXT' buttons are at the bottom.

Step 4: Confirmation

1. The client will be presented with the 'Booking Successful Message' that was configured in setup and will have the option to book another appointment if they wish by clicking the **'MAKE ANOTHER BOOKING'** button. Below that your client will see the Promotional Image you would have created in the setup side.



The screenshot displays the confirmation page for Barry's Point Vet Clinic. At the top left is the clinic's logo, a green circle with a white cross and the text 'BARRYS POINT VET CLINIC TAKAPUNA'. To the right of the logo, the text reads 'BARRYS POINT VET CLINIC' in green, with 'imaginary Vet Clinic' in smaller black text below it. The main heading is 'ONLINE BOOKING' in bold black. Below this is a navigation bar with four tabs: 'BOOKING INFO', 'TIME SLOT', 'YOUR DETAILS', and 'CONFIRMATION'. The 'CONFIRMATION' tab is highlighted in red. In the center of the page is a large green checkmark icon. Below the icon, the text states: 'Your appointment request has been submitted successfully. We will confirm your booking as soon as possible. For assistance call us on 02 1234 5678.' Underneath this text is a red button labeled 'MAKE ANOTHER BOOKING'. At the bottom of the page is a promotional image featuring a brown dog and a tabby cat, both holding toothbrushes. Below the image, the text reads: 'PETS NEED DENTAL CARE TOO!' in large, bold, black letters, followed by 'MAKE REGULAR BRUSHING AND CHECK-UPS A PART OF YOUR PET'S HEALTH CARE ROUTINE.' in smaller, bold, black letters.

Making a booking by Logging In

Step 1: Booking Info

Here you can select a;

- **Branch:** (all your branches will show in this list, there is no option to only show some),
- **Service:** which will have options provided from your choices of 'Appointment Reasons' on the setup side, and then your
- **Staff:** also as per options provided from your choices on the setup side.
- **Num of Patients:** How many patients are being brought in for this visit?

BARRYS POINT VET CLINIC
imaginary Vet Clinic

ONLINE BOOKING


BOOKING INFO	TIME SLOT	YOUR DETAILS	CONFIRMATION
Branch	Demo	▼	
Appointment Type	Standard Appointment	▼	
Service	Consultation	▼	
Staff	Any staff	▼	
Num of Patients	2	▼	

Please provide patients' details after selecting a time slot.

NEXT

Step 2: Time Slot

Now you can choose a time slot from the days available. Times and dates shown reflect the 'Bookings allowed after' setting configured in setup. Clicking on a time slot will proceed the booking to the next stage.



BARRYS POINT VET CLINIC

imaginary Vet Clinic

ONLINE BOOKING

BOOKING INFO
TIME SLOT
YOUR DETAILS
CONFIRMATION

◀ ▶
📅 24 Aug 18 - 26 Aug 18

	Fri 24	Sat 25	Sun 26
Ms. Penelope Pittstop	08:00	09:00	19:15
	08:15	09:15	19:30
	08:30	09:30	19:45
	08:45	09:45	
	09:00	10:00	
	09:15	10:15	
	09:30	10:30	
	09:45	10:45	
	10:00	11:00	
	10:15	11:15	
	10:30	11:30	

BACK

Step 3: Your Details

1. For existing clients, after clicking **'LOGIN'**, they must provide an email address and password, fill in the 'Captcha' field and click the **'LOGIN'** button.

The clients username is stored in VetlinkPro under the client record in the more tab. The password by default will be their client record number (excluding the '1/'), which may be changed by them once a booking has been made.)

2. Once they have logged in the client will be greeted with a welcome message and will need to fill in the following information:
 - Patient (a list of their registered patients from a drop-down menu)
 - Phone
 - Email
3. If they need to book for more than one pet or have any notes they wish to add, they can do so in the 'More Patients' and 'Notes' fields before clicking **'NEXT'**.
4. This screen lists all the information the client has provided, allowing them to review, or if they need to, go back and change any details they feel are wrong. Once they are satisfied their details are correct, they can click **'BOOK'**.

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imaginary Vet Clinic

ONLINE BOOKING

BOOKING INFO TIME SLOT **YOUR DETAILS** CONFIRMATION

Login

Email

Password

Captcha Type the code from the image

[Forgot password? Click here to request it.](#)



BARRYS POINT VET CLINIC

imaginary Vet Clinic

ONLINE BOOKING

BOOKING INFO

TIME SLOT

YOUR DETAILS

CONFIRMATION

Hello John Smith

Patient Chase

More Patients

Phone

Email

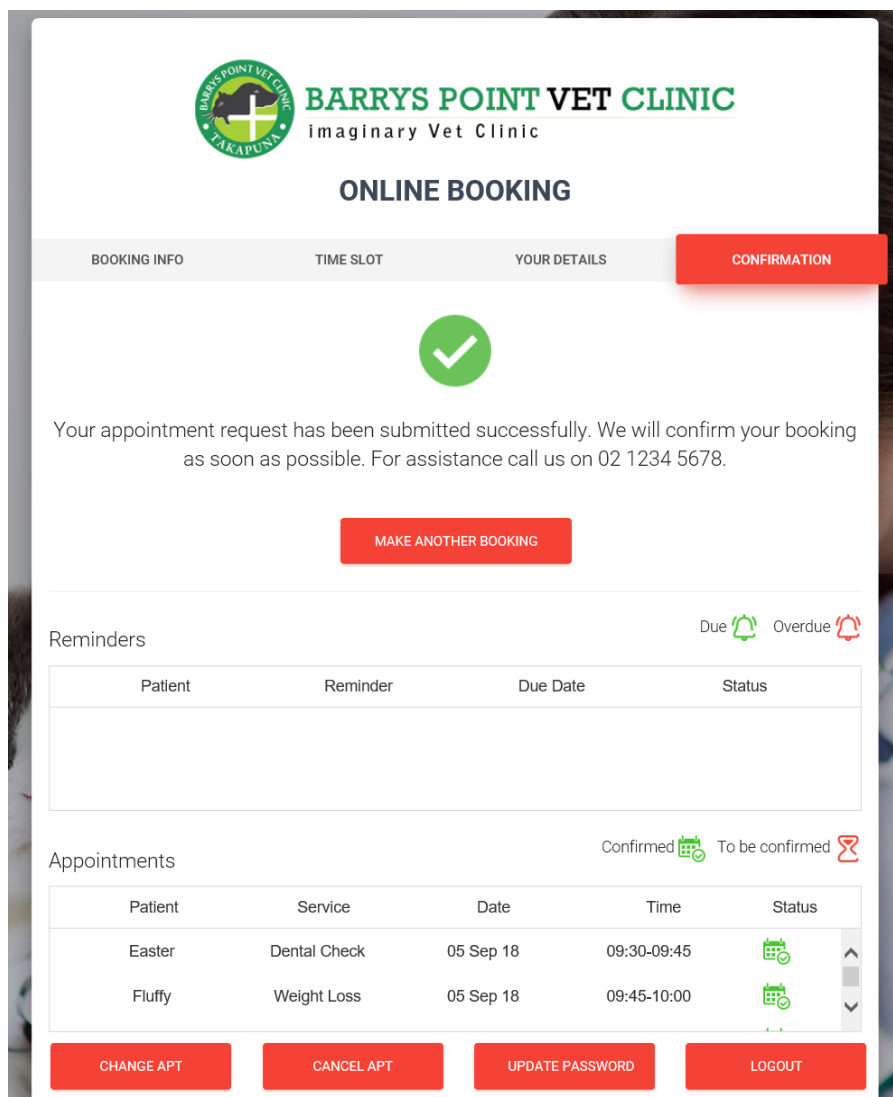
Notes

BACK

NEXT

Step 4: Confirmation

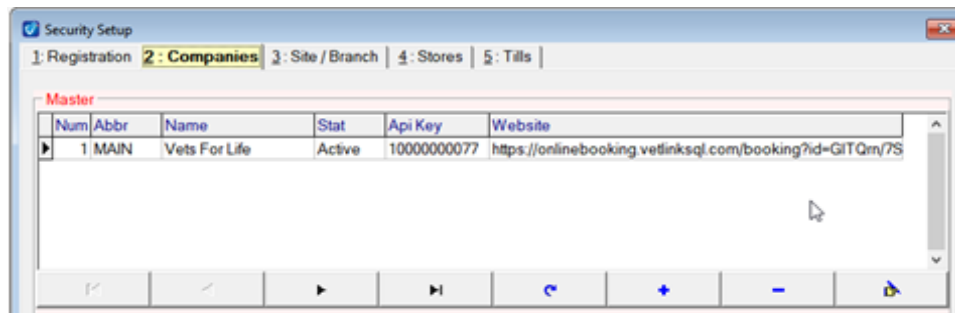
1. The client will be presented with the 'Booking Successful Message' that was configured in setup and will have the option to book another appointment if they wish by clicking the **'MAKE ANOTHER BOOKING'** button.
2. A 'Reminders' section will also appear, providing information on any upcoming reminders they may have.
3. An 'Appointments' section that will list any upcoming appointments that have been previously confirmed with the clinic. The client is given the option of changing or cancelling these appointments with the **'CHANGE APT'** and **'CANCEL APT'** buttons.
4. If the client wishes to change their password, clicking the **'UPDATE PASSWORD'** will bring them to a new screen where they can do so.
5. Finally, the client will be given the option to log out with the **'LOGOUT'** button if they wish to do so, but this is normally only required if they are using a PC that is accessed by the public. If they do not log out, then any new bookings made in that browser session will be automatically logged in as the previous bookings client.



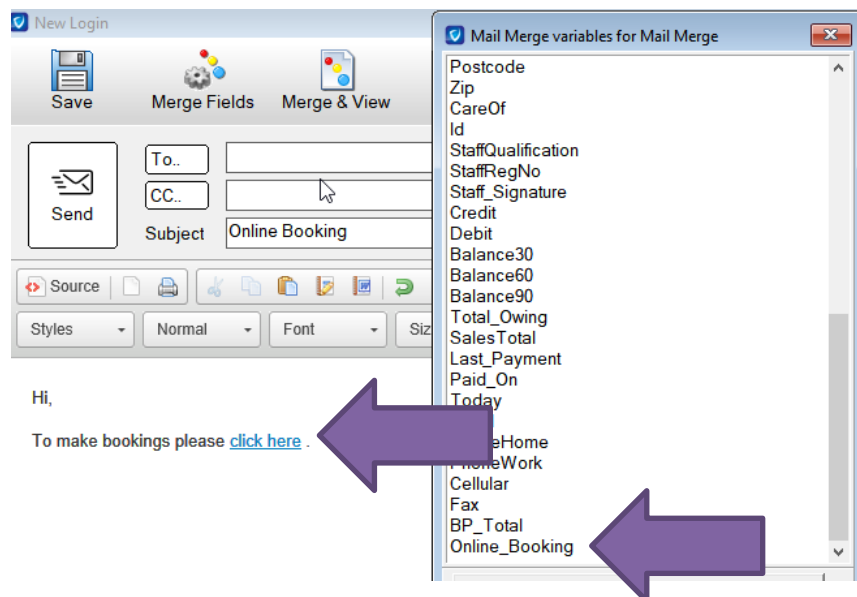
MAIL MERGE URL (VACCINATION REMINDERS)

A mail merge field called Online_Booking can be added to Email/SMS reminders or mailers. This creates a personalised encrypted link for the client. When clicked it will log the client directly into their online booking profile so they don't have to remember passwords or type in their details to make a booking.

1. Enter Online Booking URL into **Options | Setup | Regn | 2. Companies | enter URL in Website field.**



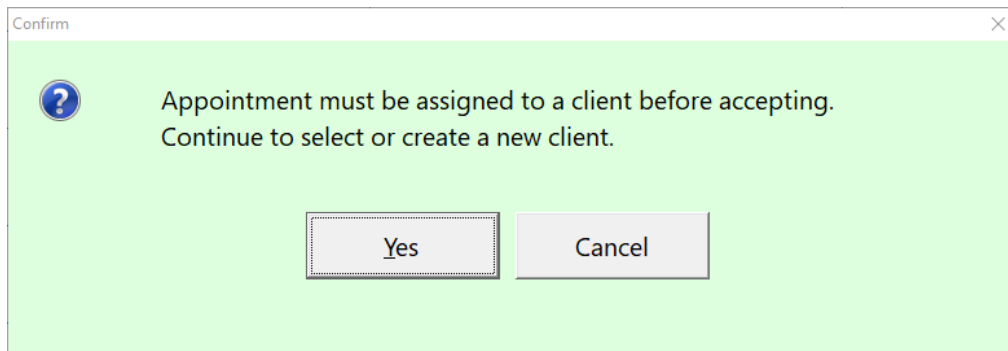
2. Add the mail-merge variable to the Email or SMS mailer you have created.
 - See the Vaccinations Reminders or Marketing Module chapters from the manual for more information on finding and editing the templates.
 - The field is available only where client information is available.
 - For Email the field gets merged as a hyper link “click here”
 - For SMS and Documents it will be merged to the actual link to the URL. For SMS this will mean the message will exceed 160 characters so two or more SMS will be charged to your account.



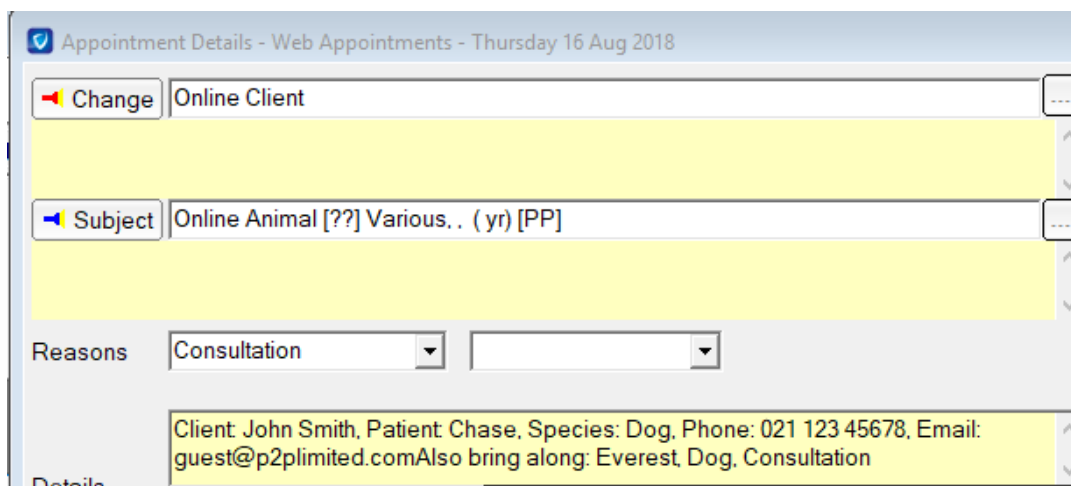
CONFIRMING BOOKINGS IN VETLINKPRO

Bookings Where Client HAS NOT Logged In

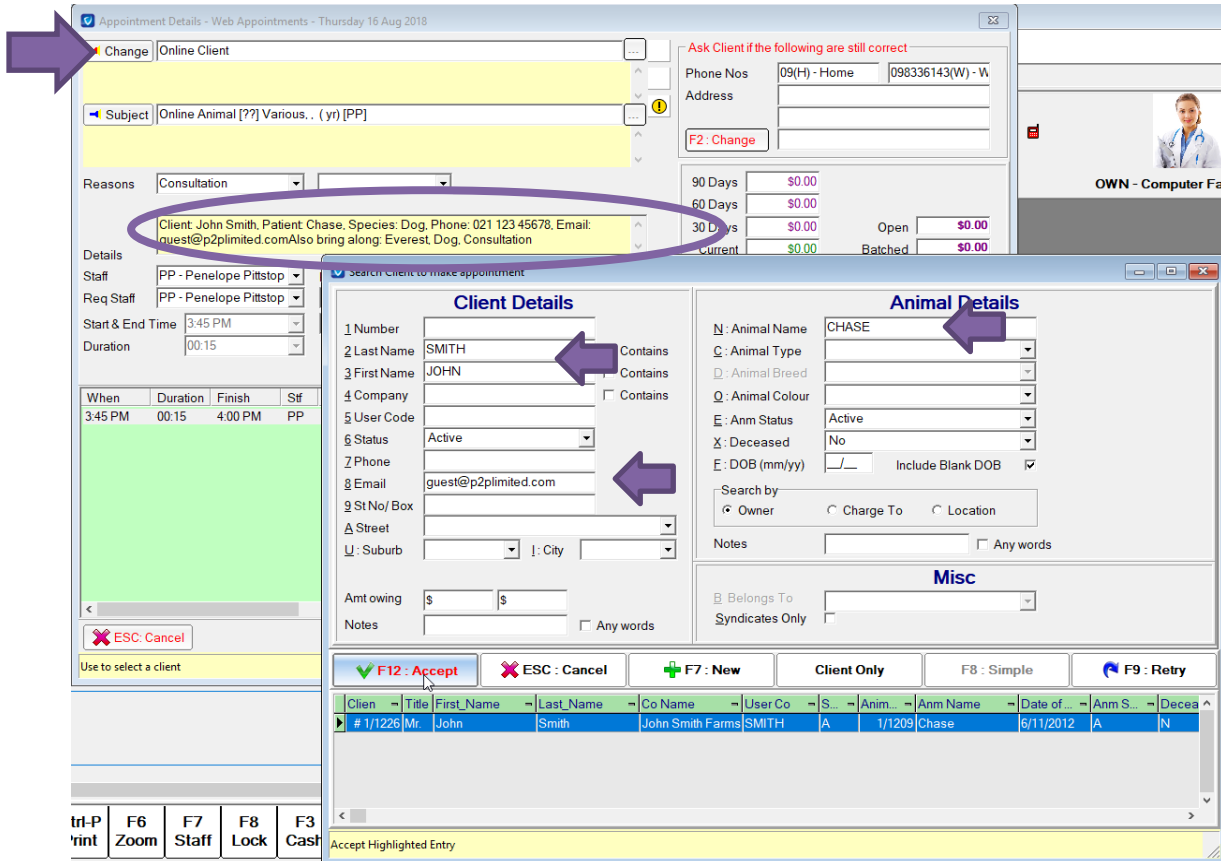
1. When the appointment comes into VetlinkPro, if the client name is set to 'Online Client', this indicates the client did not login when making the booking, so the staff member will need to link the booking to a client record.
2. In the notes at the bottom of the appointment, this shows the client details that the booking is for. A staff member can use these to find the client to make the booking for or create a new client record.
3. To link to the correct client record right click on the appointment and select 'Edit/View Details'.
4. If the appointment is accepted a prompt will appear asking the Staff member to assign the appointment to a client record before continuing.



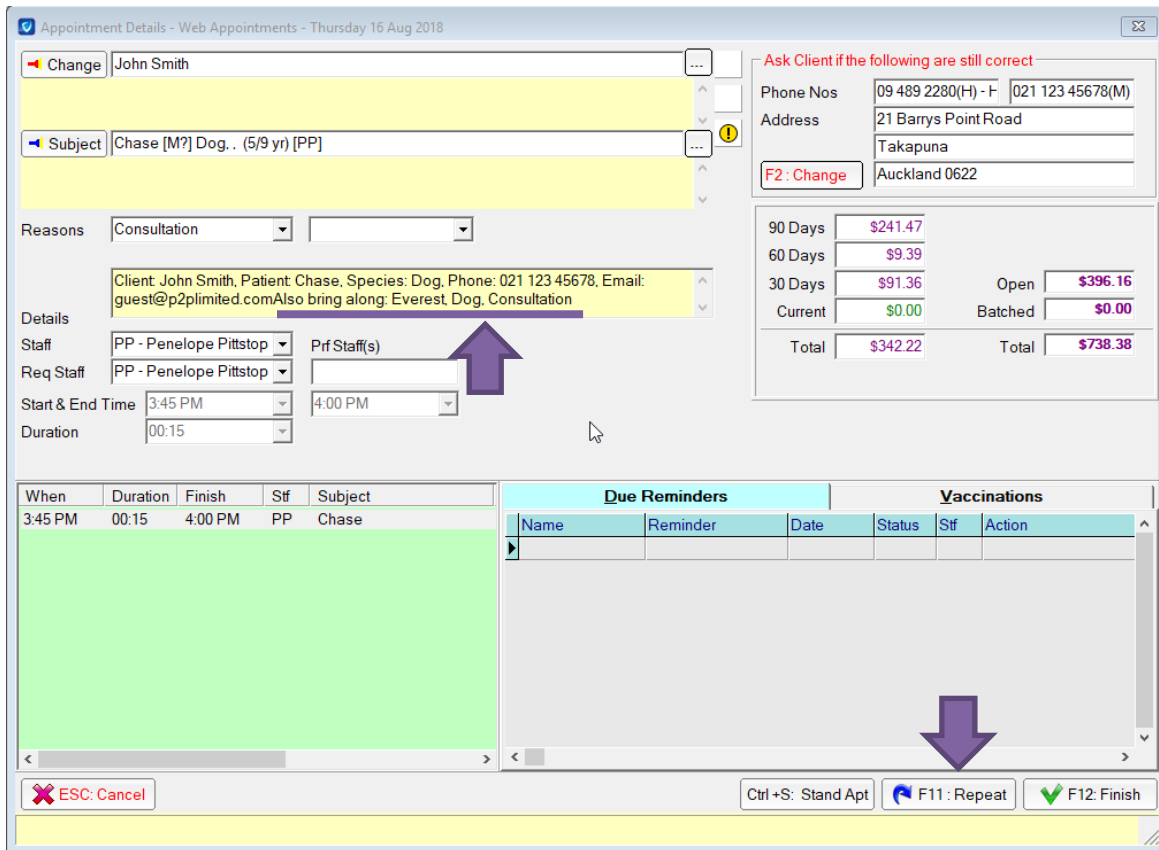
5. Click yes and the appointment details window will open.



6. In the top left of the appointment details window;
 - The client will be set to Online Client.
 - The Patient will be set to Online Patient.
 - The details section will have the details of the client/patient making the booking as well as any additional bookings.
7. Click the 'Change' button to find the correct client/patient record to assign the appointment to or create a new client/patient.
8. You can use the information in the details section to help find the client.

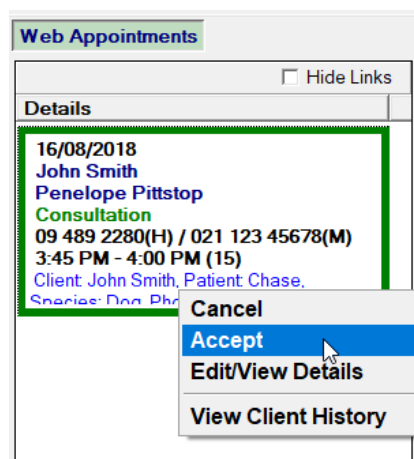


- If the client is bringing in two patients, the details for the second booking will be in the details section as well. Click the repeat button



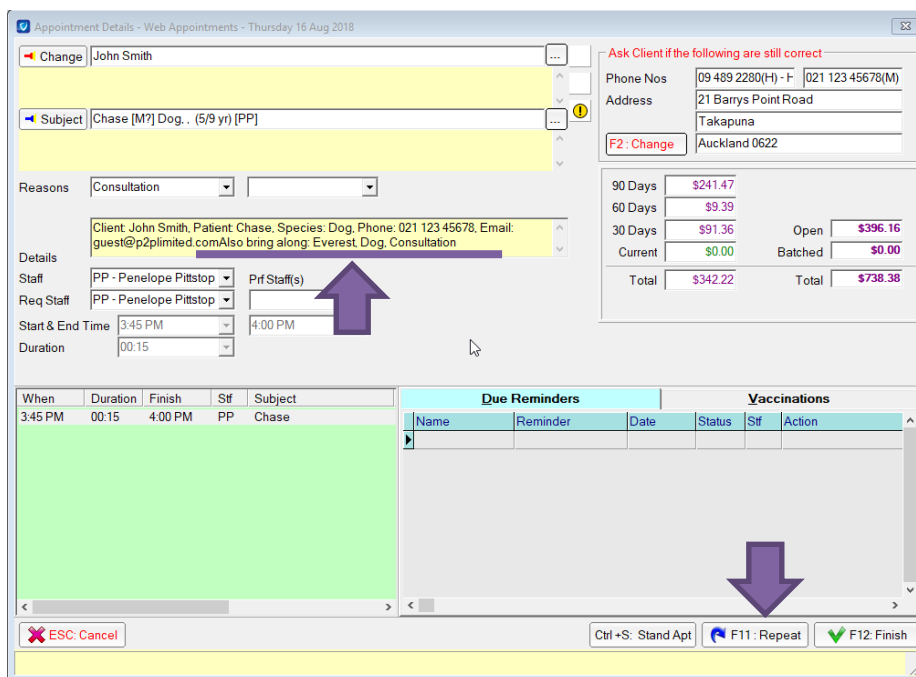
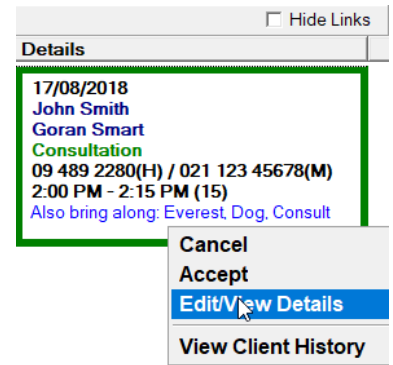
- Once the staff member clicks 'Finish'. The client and patients/s will be set in the appointment. However, the appointment will stay in the 'Web Appointments' list.

- Right click on the appointment and click 'Accept' to move it to the correct date/time in the diary.

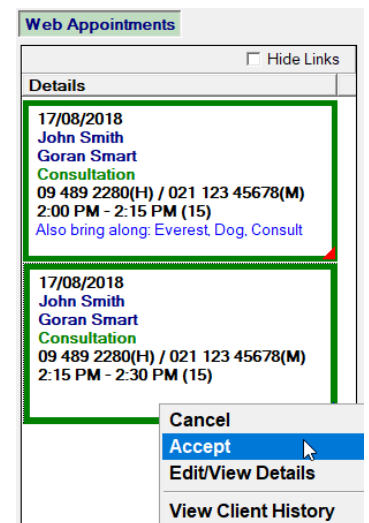


Bookings Where Client HAS Logged In

- When the booking comes into VetlinkPro, the client name and 1st patient's details will already be set.
- If the notes also say they are bringing along another patient, then:
 - Right click and select 'Edit/View Details'.
 - Once the 'Appointment details' window opens click the 'Repeat' button.
 - Select the second patient or create a new one.
 - Set the appointment reasons/details and click 'Finish'.
 - Another linked appointment for the second patient will be created in the 'Web Appointments' list.



- Once you have confirmed the booking details for the appointment(s) are correct then right click and select Accept.

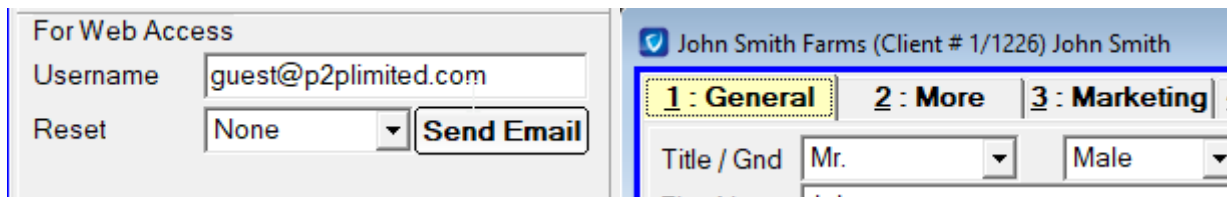


Client Login Details

The client login details are under the More tab of the client record, When you create a new client the email address will be copied to the 'Username' field. However, for any subsequent changes to the email address, the 'Username' field will not update automatically, staff must change this manually.

The default password for the client will still be the client number excluding the '1/'. The client can change the password at the end of the online booking process.

If the client forgets their username/password you can reset them using the 'Reset' drop-down menu and choose to reset the 'UserName', 'Password' or 'Both' then send an email. If you reset the password it will be changed back to the default which is their client record number.



TELEMEDICINE FROM ONLINE BOOKING

Please refer to the Telemedicine Chapter for instructions on using Telemedicine with Online Booking.