

RECEPTIONIST USER GUIDE

Online appointments are displayed in **TWO** different ways

MATCHED APPOINTMENT (Recognized Existing Client/Patient)

- email address and/or mobile number
- pet name

are **MATCHING** in Cornerstone

→ The appointment will be booked and shown as a **MATCHED** appointment in Cornerstone

Machado, John (Roy)

No Further Action Required!



UNMATCHED APPOINTMENT (Unrecognized Existing or New Client/Patient)

- email address and mobile phone number
- pet name

are **NOT** found in Cornerstone.

→ The appointment will be booked and shown as a **DAILY BLOCK-OFF** in Cornerstone.

Web Appointment : Cooper (Dog) - Vaccination Vet (primary &

Establishing if the client is EXISTING or NEW

Criteria to check:

- Is this an **EXISTING** client using a different set of details? (e.g husband versus wife)
- Is the Pet name different from the one on your account? (e.g *Maisie* versus *Maisy*, *Hufflepuff* versus *Huffle Puff*)

EXISTING CLIENT

Actions to take:

- **Pet name:** Modify spelling in Cornerstone.
- **Email address:** add this new email address to Cornerstone.
- **Mobile phone number:** add this new mobile phone number to Cornerstone.



NEW CLIENT

Actions to take:

- Email/Phone client to confirm appointment details
- Obtain the additional details necessary for the registration of the client.



FOR FURTHER QUESTIONS,
WE CAN BE REACHED
AT:

support@vetstoria.com