

Creating a New Client Record

To resolve an unmatched appointment, you will first need to create the new client and patient file manually and update the booked appointment on the calendar. You can do this by following these steps:

1. To begin, double-click on the appointment, and a pop-up similar to the one below should appear.

NEW APPOINTMENT

client:

appointment column: Online Booking 1

date: 21/02/2024 ☐ no repeat

type: Consultation

time: 10 : 30 duration: 30 minutes

appointment for: Search for name...

by: Search for name...

memo: VETSTORIA Milo (Dog) - Sammy Dawson (7777777777 sammy@vetstoria.com) - [Clinician : Dr. James]

status: booked

Cancel Delete Copy Save

2. Utilize the information from the memo section or from the email you receive from Vetstoria via the new client form. Click on save.

NEW APPOINTMENT

client:

appointment column: Online Booking 1

date: 21/02/2024 ☐ no repeat

type: Consultation

time: 10 : 30 duration: 30 minutes

appointment for: Search for name...

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memo: VETSTORIA Milo (Dog) - Sammy Dawson (7777777777 sammy@vetstoria.com) - [Clinician : Dr. James]

status: booked

Cancel Delete Copy Save

IDEXX Anima

john doe Client

NEW CONTACT

Data

Start Date: 21/02/24

Registered As: ☒ Individual ☐ Company

Company Name:

Title: Mrs.

*First Name: Sammy

*Last Name: Dawson

Birth Date:

ID Number:

Email: sammy@vetstoria.com

Website:

Bank Account:

IBAN:

BIC:

Vat Number:

Vat Code Sale:

Mailing Address

House Number:

*Street: 18 Crucifix Ln, London SE1 3JW,

*City: London

Country: United Kingdom

*Postcode: SE1 3JW

*Country: United Kingdom

Client Recruitment

Client Recruitment:

*Phone / Fax

☐ Contact does not wish to provide a number

Mobile ☒ +44 7777777777

Client Card

☐ Client Card

Save Import Contact Details

NEW PATIENT

Name	Species	Breed	Age	Descent	Colour	Last Visit
Milo	Canine					

+ New Patient

Move Patient To This Client Merge Patients

3. Return to the calendar and double-click on the appointment. Then, enter the newly created client's name into the client name box. Click on the pop-up that appears displaying the newly created client details.

NEW APPOINTMENT

client: sammy

appointment column: Sammy Dawson | 18 Crucifix Ln, SE1 3JW, London

date: 21/02/2024 ☐ no repeat

type: Consultation

time: 12 : 45 duration: 30 minutes

appointment for: Search for name...

by: Search for name...

memo: VETSTORIA Milo (Dog) - Sammy Dawson (7777777777 sammy@vetstoria.com) - [Clinician : Dr. James]

status: booked

Please note:
Unmatched bookings that already have a record will need to be managed differently.

4. Remember to gather the remaining client details to update your client and pet files once they visit your clinic.