PetDesk Best Practices

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PetDesk CSR Best Practices

1. **Schedule Requests in Needs Attention:**

Requests and Cancellations will come through your Needs Attention tab. Respond to requests by the end of each business day.

***When a request comes through PetDesk, it is only a request...it will need to still be scheduled in the eVet.**

Cancellations should be reached out to reschedule by phone- if no connect, send a Direct Message through PetDesk. Remove Cancellation with red trash can or "Scheduling Other Date & Time" function.

2.) Collecting Client Contact Info:

The PetDesk 'Today' tab and 'Call List' will show your scheduled appointments for today and tomorrow. Clients will have red flags if they are missing any information. (see below)

Confirm Garrett's correct email when checking in.

*The Admin on the account will receive an email list of invalid emails and invalid cell phone numbers every two weeks.

3.) Increase App users:

Clients will have a phone icon next to their name if they've downloaded the app. Clients without the phone icon are clients who have not downloaded the app.

*If a client has a valid email, send the link to a client to download the app (see below)

***Optional: Adjusting a Client's communication settings**

A client can opt out of any channel available to them (email, sms, push notification). However, there may be some cases, where it's easier to opt the client out through the PetDesk Dashboard.

1. Search client in the dashboard
2. Click on said client
3. Click "Settings"
4. Toggle off/on settings
5. This is an immediate update to a client's account