Academy
SOLUTIONS VET

Module 12 - Appointment Book

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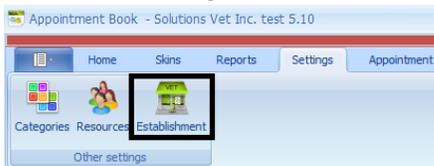
1. Settings

The first step when using the appointment book is to create its basic settings, notably by entering your establishment's availability and adding your resources and your appointment categories.

1.1 Establishment

Go to the "Settings" tab and click on "Establishment".

Let's start by entering the periods of availability of your establishment. This means indicating the establishment's opening hours.
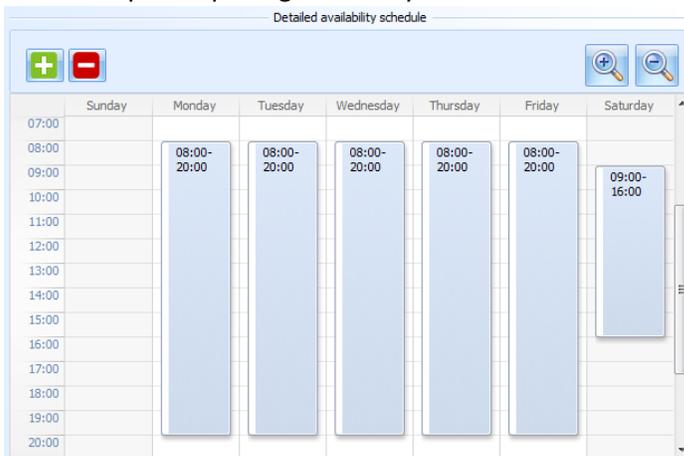
Add an availability schedule (opening hours) for your establishment using the button 🟩.

Indicate the date on which this schedule starts and the date on which it ends. If you don't know the end date, leave this field blank.
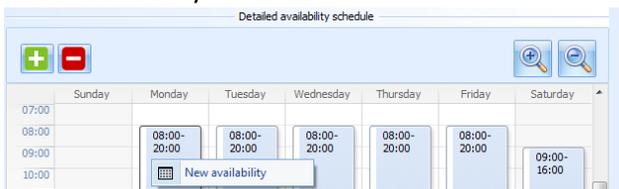
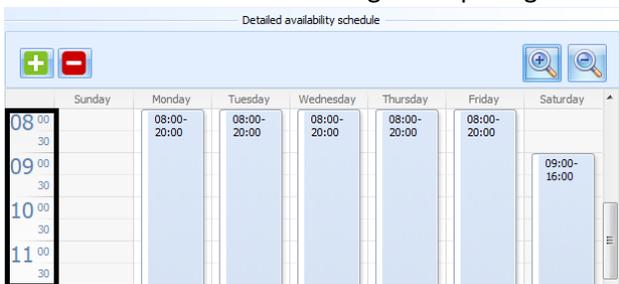***** Be careful not to overlap schedules *****
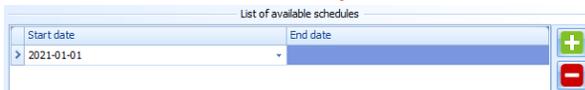
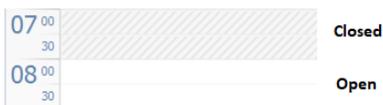Then set up the opening hours of your establishment.

Select the time slots and click on the button to add them. You can also right-click and click on "New availability".

Use the buttons to change the spacing in the time scale to access the minutes.

This is how your availability schedule will appear in the appointment book.

You can set up a colour that will be linked to your establishment and that will be visible on all VetWare windows.
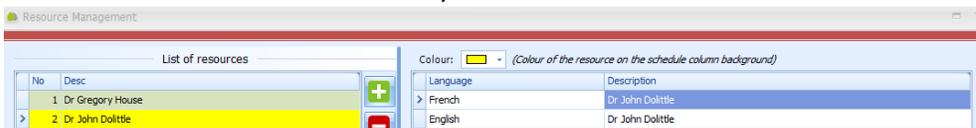

1.2 Resources

Resources are the entities to which the appointments are assigned. The resource can be a person, a process, a device, etc.

Go to the "Settings" tab and click on "Resources".

To add a resource, use the button and enter the description of the resource. You can also define a colour that will be linked to your resource.

You can set the order in which your resources are displayed in your appointment book using the buttons ⬆⬇.

As for your establishment, you must add an availability schedule (working hours) for your resources using the button ➕.

Set the date on which the schedule starts and the date on which it ends. If you don't know the end date, leave this field blank.

*** Be careful not to overlap schedules ***
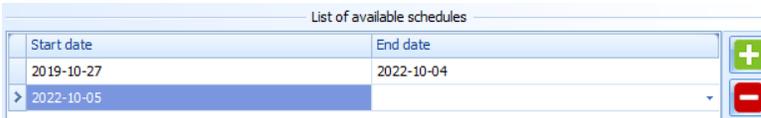
Then set up the working hours of your resource.
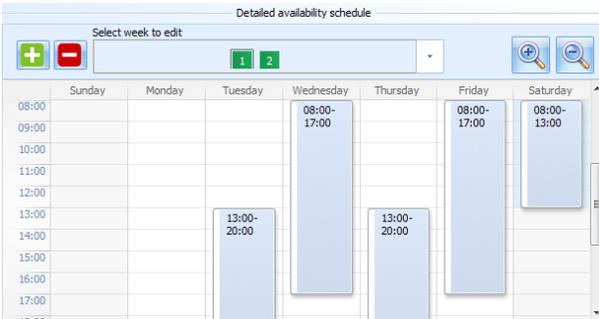
To do this, select the time slots and click on the button ➕ to add them.
You can also right-click and click "New availability".

You can set up a different schedule for more than one week by using the following buttons ➕ ➕ ➖.

Example: if the resource has a stable schedule that changes every 2 weeks, the schedule will be alternated every 2 weeks for this resource.
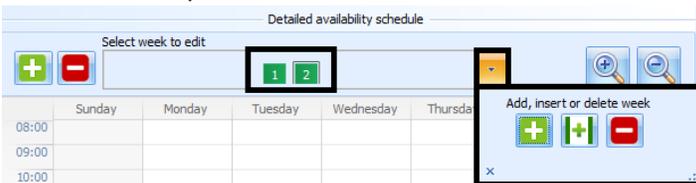
Use the buttons ⊕ ⊖ to change the spacing in the time scale to access the minutes.
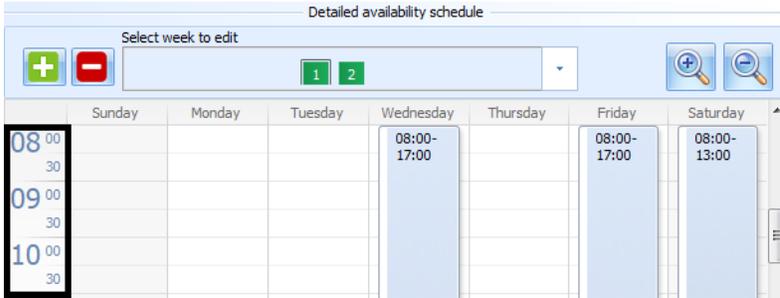
This is how your availability schedule will appear in the appointment book for the resource.
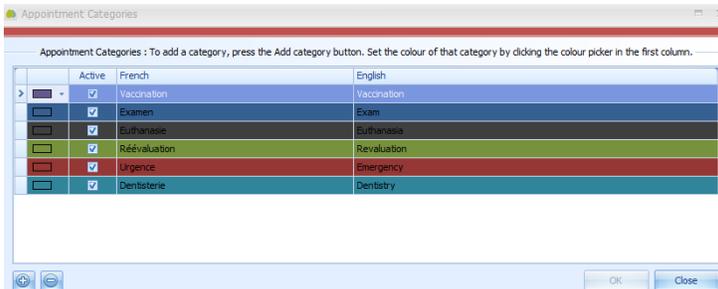

Resource unavailable

Resource available

1.3 Categories

Appointment categories are used to identify the type of appointment with the help of a colour to give an overview of a group of appointments at a glance.

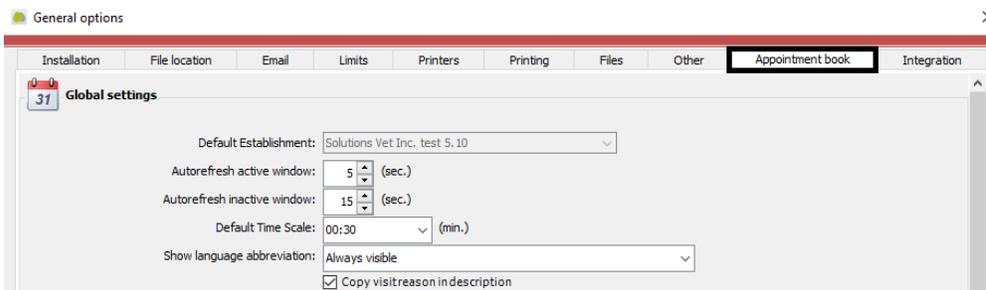Go to the "Settings" tab and click on "Categories".
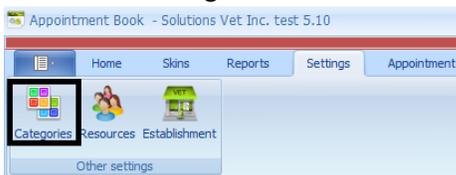
Add your appointment categories and define a colour for each.

1.4 Global settings

The global settings in the appointment book apply to all users. On the VetWare menu, go to "Configuration" > "General options" > "Appointment book". You may need to adjust your user profile.

1.5 User settings

User settings apply only to the current user. On the VetWare menu, go to "Configuration" > "General options" > "Appointment book".
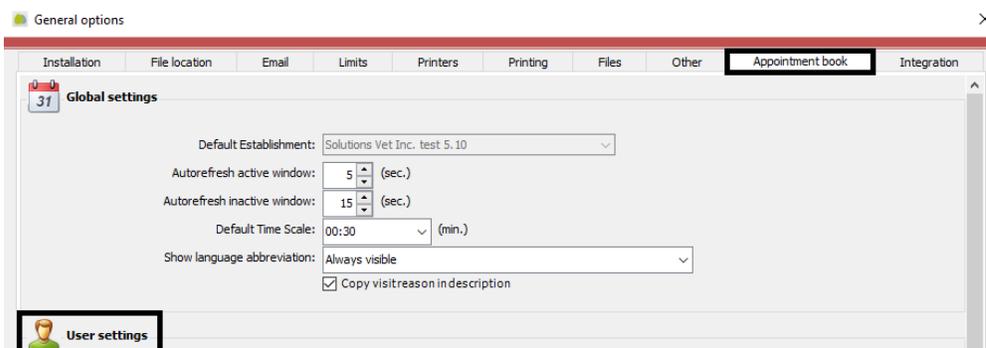
1.5.1 Appointment book window
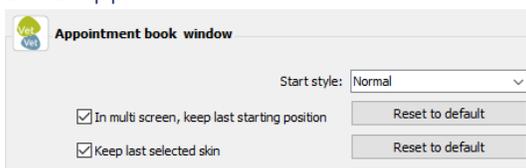
Start style: Allows you to determine whether the appointment book application will start with its normal or maximized (full screen) window.

Multi-screen: By activating this function, you ensure that the application will start in the last screen in which the appointment book window was placed, so if you have more than one monitor, you move the appointment book window into the one where it should start the next time.

Skin: To be activated if you want the application to restart with the last selected skin.

1.5.2 Scheduler settings

Default Time Scale: Determines the time scale of your appointment book. It is recommended to always use the global settings for all users.

Default group by: Determines which grouping the appointment book window will start with.

1.5.3 Categories

This option allows you to determine which category filter will be activated by default when the application starts.

You can also select which appointment category will be assigned by default each time you create a new appointment.

1.5.4 Resources

This option allows you to determine which resource filter will be activated by default when the application starts.

You can also select which resource will be assigned by default each time you create a new appointment.

"Automatically unselect resources that are not available in the viewed dates": If a resource is not available for a whole day (either according to their availability schedule settings or using

unavailability), then they will be unselected when the user displays this day in the appointment book.

"Automatically show all resources when grouped by resource": For establishments that have multiple resources in the appointment book, this allows all of them to be displayed in the window without having to use the horizontal scroll bar.

2. Appointment

2.1 Create a new appointment

In the contextual menu of the client or animal (right-click), click on "Copy the information for the appointment book".
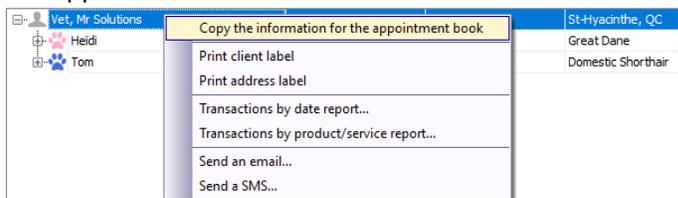
Then select the time slot where you want to put the appointment, and in the contextual menu of this time slot, click on "Paste from VetWare / LogiVet".

The "Edit Appointment" window will appear, and you will be able to fill in the information for the appointment.
Another option is available, without going through the VetWare search window, to add an appointment.
In the contextual menu of the chosen time slot, click on "New".

Then open the drop-down menu in the "Edit appointment" window to search for the client.

You also have the option to create a new client using the button .

2.2 Appointment status

The appointment status gives you information on the appointments at a glance.

- **Booked** (blue border)

- **Arrived** (green border): The client has arrived at the clinic for their appointment.

- **Done** (gray border): The appointment is completed.

- **Missed** (pictogram): The client did not show up for the appointment.

- **Cancelled** (pictogram): The client has contacted you to cancel their appointment.

- **Confirmed** (pictogram): The client confirmed the appointment after having received an appointment confirmation (phone, email or SMS) from you.

To change the status of an appointment, place the mouse cursor over it and right-click to bring up the appointment context menu. Select the appointment whose status you want to modify.

2.3 Unavailability and time reservation

Like appointments, the unavailability and reservation periods are adjustable and moveable. To use an unavailability or a reservation, use the contextual menu on a time slot.
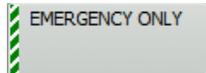

2.3.1 Unavailability

Unavailability periods are used to indicate that the resource is not available and/or not present for the selected time slots. It can be used to identify, for example, a meal period, an absence, etc. The unavailability period will be identified by a red and white hatched ribbon.

2.3.2 Reservation

The reservation periods can be used to indicate the type of appointments to be scheduled for the selected time slots. They can be used to identify, for example, a time slot for vaccinations, emergency, surgery, etc. The reservation will be identified by a green and white hatched ribbon.
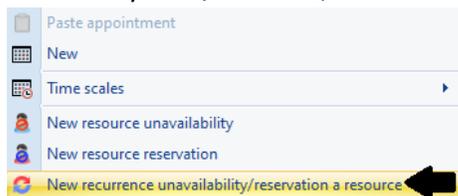

It is also possible to schedule an appointment in the same time slot while keeping the reservation.

2.3.3 Unavailability/Reservation recurrence

If you need to schedule a recurring unavailability or reservation in the same time slot over several days and/or weeks, this can be done using the recurrence function.
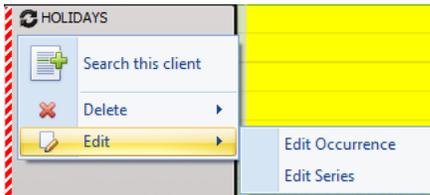
You will be able to select the period of unavailability or reservation as well as the frequency and the desired day(s).
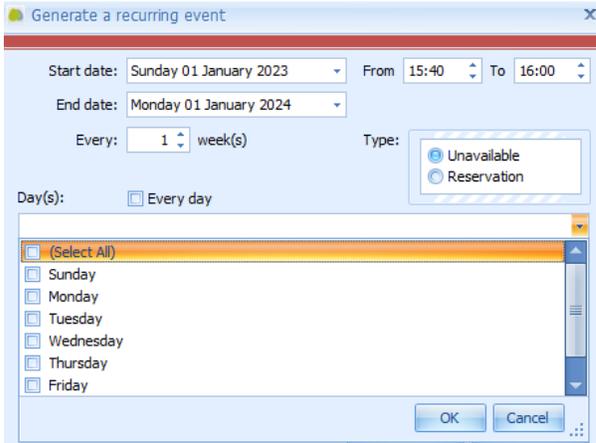
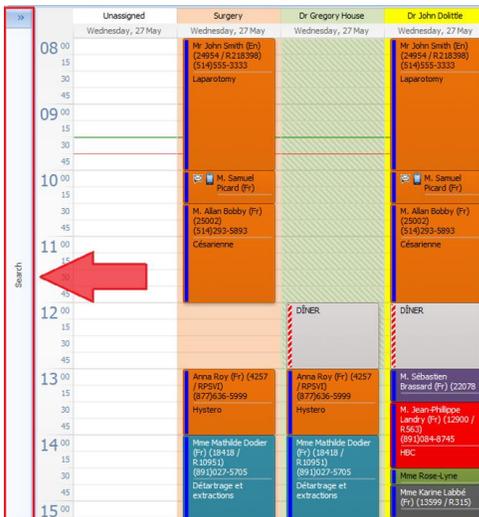Recurrences will be identified by the symbol ⟳.

It will be possible to delete and/or edit either the occurrence (time slot on which the contextual menu is opened) or the series of recurrences.

2.4 Appointment search

To display the Search tool, click anywhere on the "Search" bar or on the button » at the top of the bar.

Once the search tool is displayed, you can enter the search parameters (single or multiple).

Date (choice): This can be a date in the future or in the past.
Phone: By area code + number
Name (in whole or in part): Last name, first name
ID: The client's identification number

1- Then click on the search button .

2- The results are displayed in the results grid.

Note: If the search does not return any results, the title above the grid will display:
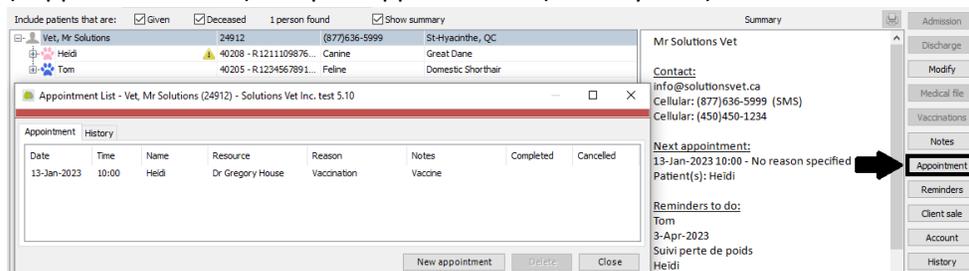Results: 0

3- Click on the desired line, then on the button "Show selected appt." or simply double-click on the selection.

4- The scheduler will automatically bring you to the appointment date and display it with a red dotted outline.
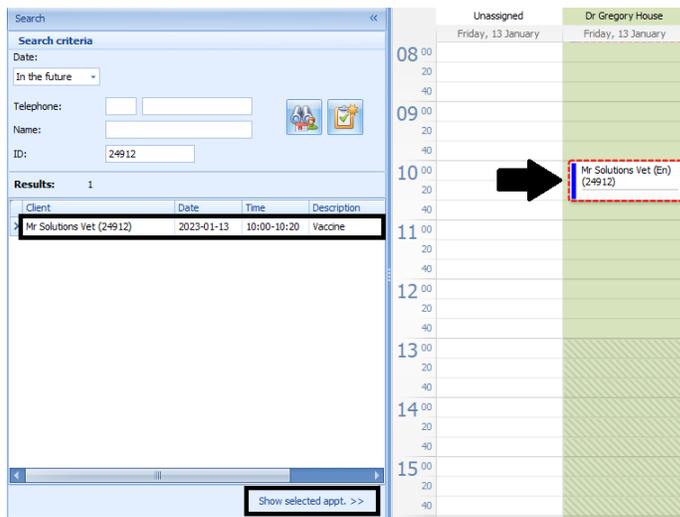
Note that you can also use the client's appointment list to view future appointments ("Appointment" tab) and past appointments ("History" tab).

3. Appointment confirmation

3.1 Individual confirmation

VetWare gives you the possibility to confirm your appointments in 3 ways: phone, email and SMS. When you have received confirmation from your customer that they will be present at their appointment, use the icon ✒ in the appointment contextual menu.


3.1.1 Phone confirmation

Call the client directly to confirm the appointment. If you were unable to speak with the client but were able to leave a message on their voicemail, use the "Left message" icon ◠◠ in the appointment contextual menu.

3.1.2 Email confirmation

You must first have created your email template(s) and make sure that you have the right default template for your email appointment confirmation (see module #16 for more information on managing email templates).

Select the option "Send a confirmation email" in the appointment contextual menu.
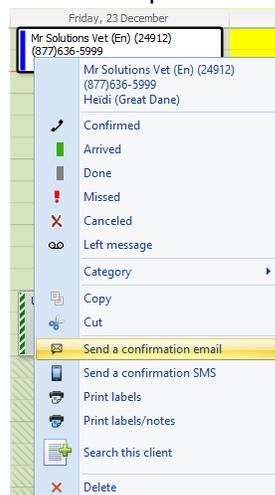
Once the email is sent (if the client has an email address on file), the pictogram ✉ will appear on the left side of the appointment.
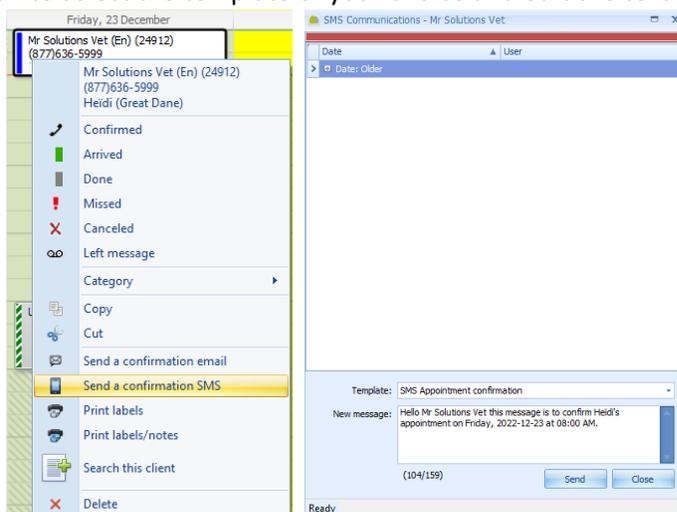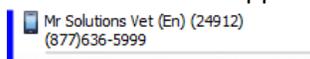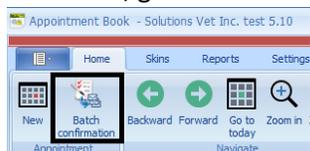
3.1.3 SMS Confirmation

***** You must be subscribed to VetWare's two-way SMS messaging service.
Contact one of our support agents for more information. *****

Beforehand, you must have created the SMS template(s) and make sure you have the right default template for your SMS appointment confirmation (see module #16 for more information on managing SMS templates).

Select the "Send a confirmation SMS" option in the appointment contextual menu. You will also have the option to select the template of your choice and edit the text if needed before sending.

Once the SMS is sent (if the client has an SMS cell phone on file), the pictogram 📱 will appear on the left side of the appointment.

3.2 Batch confirmation

Batch appointment confirmation allows you to confirm, by email or SMS, several appointments at the same time for a specific period.

To do this, go to the "Home" tab and click on "Batch confirmation".

By default, clients with an email address or an SMS cell phone whose appointment has not been confirmed will be displayed.

It is possible to include confirmed appointments ✎ by checking this option.

You can deactivate the sending of confirmations for appointments displayed in the list that you do not want to send.


Once sent (email or SMS), appointments will be automatically confirmed ✎ by default. If you do not want to confirm appointments automatically after sending, simply uncheck the option before sending your batch confirmation.

Click on "Send Email" or "Send SMS" at the bottom of the screen to send your batch appointment confirmation.

Your default appointment confirmation email or SMS message in the "Animail" window will be automatically sent.
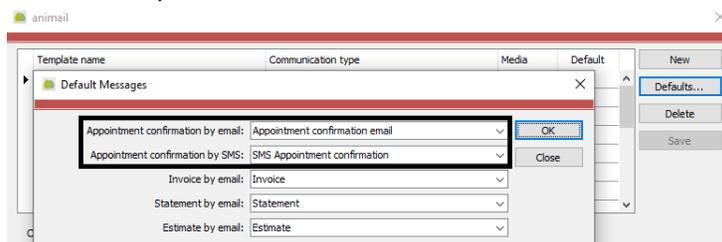
4. Printing the appointment book

To access the appointment book printing, go to the "Reports" tab.
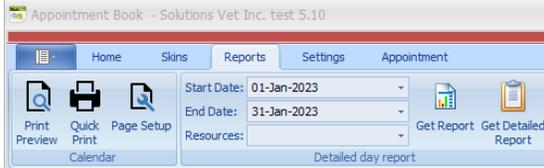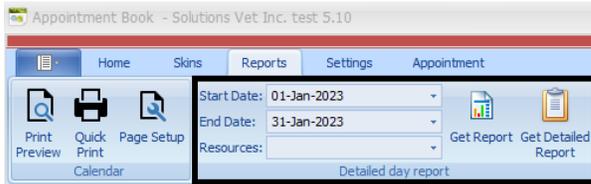

4.1 Calendar
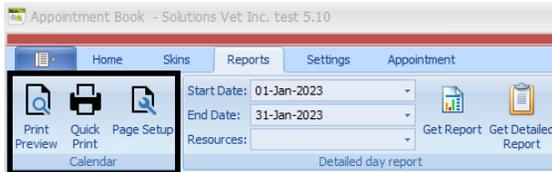
This option allows you to print the calendar window that you see on your screen. You can use the "Page setup" option to edit setting(s) before printing.

4.2 Detailed day report

The daily report option is the most recommended.
You can select the period and the resources you want to display in the report.

The report will show you only the appointments that are associated with each resource.

The "Detailed Report" will also show you the time slots available to add new appointments.