

RapportTM training resources

Adapting and adjusting your
practice workflow

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Setting up custom messaging on your email and text Appointment Reminders.



Creating a custom campaign to pet owners

Creating a custom campaign to pet owners

To create your campaign

1. From your **Rapport Media Center**
2. Hover over the **Campaigns** tab in the upper left, then hover over **Email**, and click on **New**
3. On the next screen, enter a **Campaign Title**
4. Choose the option for **Client Campaign**, click **Next**
5. On the next screen, set the **Schedule Option** to **Contact All Patients Regardless**
6. Ensure the **Status** is set to **Active Clients**, click **Next**
7. In the next screen you will see an edit window for your email, but you will want to click **Next** for now and come back to this window after saving your campaign
8. After clicking **Next**, you will see the **Summary** screen
9. Click the **Save Campaign** button in the lower right corner
10. You can click **Edit** under **Media & Messages** to return to the email editing window to make further changes to your email content.

To edit your email message:

1. **Edit** button next to the email (next to the envelope icon). You can edit your email here.
2. After your changes are made, click **Save** in the bottom right corner. If your email takes a while to create, you may want to save every few minutes, as it does time-out in the background if it sits for too long.

To preview your email message:

1. After you have saved and returned to the **Summary Page** you can go back into the **Edit** button.
2. Click the **Preview/Test** link at the bottom and you will be able to enter an email address.
3. Click **Send Test** to send a preview email to the entered address.

Creating a custom campaign to pet owners

To launch your campaign:

1. After all editing changes have been made and you are satisfied with the message, click **Launch** in the lower right-hand corner.
2. You will then have to click **Launch This Campaign** again from the next window, and an activation email will be sent. The address it will be sent to shows on the same window as this button.
3. You will need to access the email and click **Activate** from the email for the campaign to be processed and sent to clients.



****Important note: Neither Rapport or Covetrus is responsible for any text or image content in the email campaigns you create and deploy. Please be sure to proofread carefully before sending your custom messages, as they cannot be canceled once they are in queue.***



**Customizing and
sending a pre-written
COVID-19 email
message to pet owners**

COVID-19 Email Campaign Instructions

We understand your practice may need to take precautions to communicate with customers around COVID-19.

To access the campaign:

1. From your **Rapport Admin Center**
2. Click **Campaigns** on the menu bar
3. Select the campaign called, "**Situation: COVID-19**" from the campaign list
4. Click **Edit** next to Email to open the email content



There are several edits needed on this email campaign in order to customize it to fit your practice's specific circumstance.

- a) Delete all the bold words (these are for "choose your message" guidance)
 - b) Delete either the "If you are seeing patients" message or the "if you are closed" message (whichever one does not apply)
 - c) Replace all of the placeholders with your specific practice info
 - d) Ultimately, this is your message, so you can also add your own language such as a personalized message from your veterinarians and staff, logos, or color as you see fit. The buttons at the top of the editor work like any formatting editor you are familiar with.
-
5. Once necessary changes are complete, click **Save** in the bottom right hand corner to save your changes.
 6. If all editing changes have been made and you are satisfied with the message, click **Launch** in the lower right-hand corner in the next screen.
 7. You will then have to click **Launch This Campaign** again from the next window, and an activation email will be sent. The address it will be sent to shows on the same window as this button.
 8. You will need to access the email and click **Activate** from the email for the campaign to be processed and sent to clients.

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Sending an Emergency Practice Closure announcement

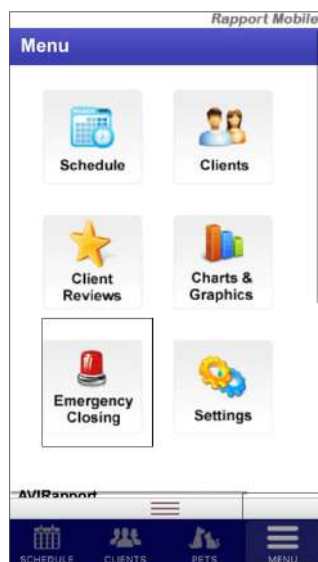
Sending an Emergency Practice Closure announcement

The Emergency Closing feature allows a mobile user to notify clients via email and text message that the office will be closed on a defined day or set of days for any emergency circumstances.

To access the feature from within the mobile application, select **Emergency Closing** from the main menu.

To create an emergency closing:

1. Select Menu Tab / Emergency Closing



2. Select Create a New Emergency Closing



3. Choose the reason for the closing (weather condition, technical condition, or other)



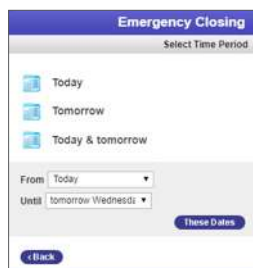
Sending an Emergency Practice Closure announcement

4. If you choose “Other Reasons” you can add your reason and create templates with a user defined message. You will need to enter the content of your message in the text box in this window.



The screenshot shows the 'Emergency Closing' form with the 'Other Reasons' section selected. The form prompts the user to 'Please provide the reason for the closing and only the reason (max 80 chars.)'. Below this, there is a 'Dear xxxxx,' field, a 'Due to ...' dropdown menu with 'Corona Virus' selected, and a text area for the message content. At the bottom, there are 'Cancel' and 'Next' buttons.

5. Select the date(s) the practice will be closed



The screenshot shows the 'Emergency Closing' form with the 'Select Time Period' section selected. It offers three options: 'Today', 'Tomorrow', and 'Today & tomorrow'. Below these, there are 'From' and 'Until' dropdown menus. The 'From' dropdown is set to 'Today' and the 'Until' dropdown is set to 'tomorrow Wednesday'. A 'These Dates' button is located below the dropdowns, and a 'Back' button is at the bottom left.

6. Preview the text message and email content associated with the closing notification



The screenshot shows the 'Emergency Closing' form with the 'Please Review and Confirm' section selected. It displays the text: 'You are about to send out an Emergency Campaign. Please preview the text and email messages below. Check the number of messages that will be sent out, enter your password and press Confirm.' Below this, there are two sections: 'Text-Message Content' and 'Email Content'. The 'Text-Message Content' section shows a preview of the text message: 'Due to Corona Virus our office will be closed tomorrow. Rapport Home Clinic.' The 'Email Content' section is currently empty.

7. Enter the authorization code to send the closing (this is the same as the user’s login password)
8. Select **Confirm & Send Message**
9. Once confirmed, the campaign is automatically delivered via email & text to the appropriate clients. Alongside the closing notification, any appointment reminders for appointments on the specified closed days are discontinued, and the specified closed days are made unavailable to any clients booking an appointment online.

Sending an Emergency Practice Closure announcement

10. The Emergency Closing will contact only clients scheduled during the closed period.



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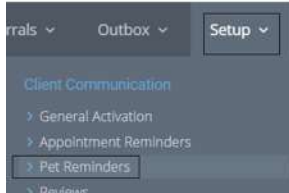


Editing Pet Reminder messages (Email & SMS)

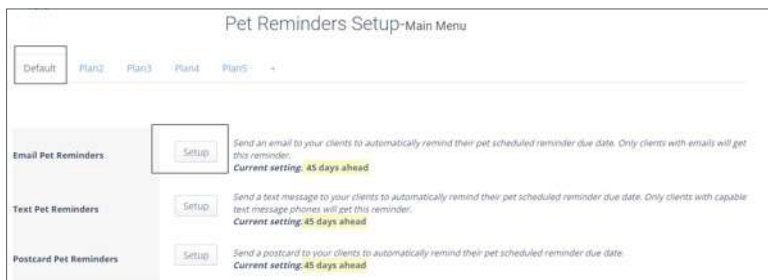
Editing Pet Reminder messages (Email & SMS)

How to edit email messages for Pet Reminders

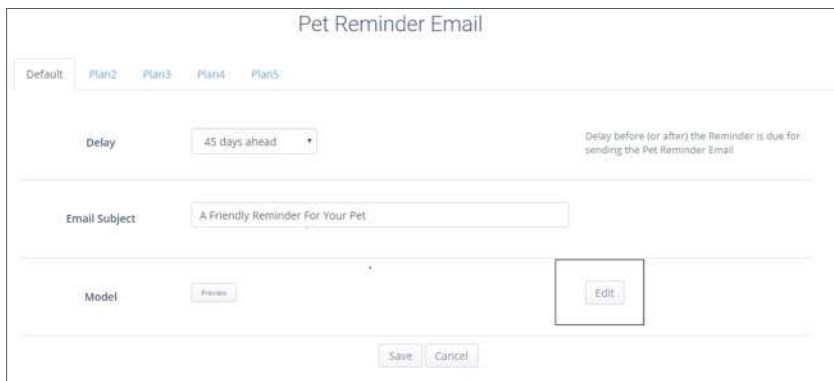
1. Setup | Client Communication | Pet Reminders



2. Click on the plan tab you need to edit, click on **Setup** next to Email Pet Reminders.



3. Click **Edit** to customize the content of the reminder message.

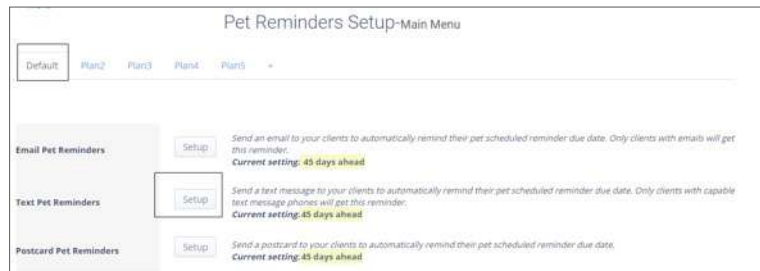


4. Edit your message and click **Save** at the bottom of the window.

Editing Pet Reminder messages (Email & SMS)

How to edit text messages for Pet Reminders

1. Click on the tab you need to edit, click on **Setup** next to Text Pet Reminders.



2. Click **Edit** on the text setup page to edit the content of the pet reminder text message.
3. Edit your message and click **Save** at the bottom of the message box. We recommend staying under 160 characters on text messages.
4. You will have to repeat this for each pet reminder plan under the pet reminder section.



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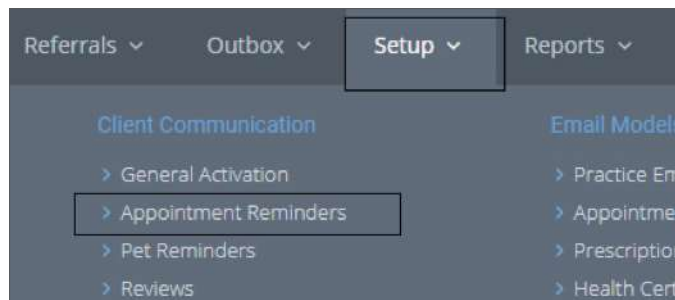


Editing Appointment Reminder messages (Email & SMS)

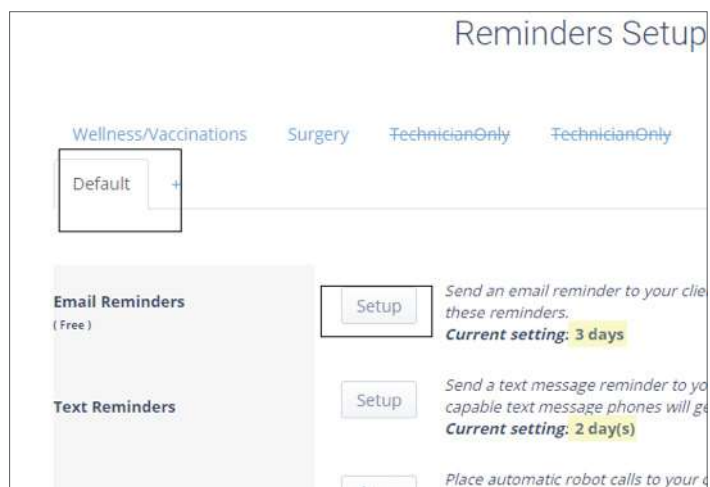
Editing Appointment Reminder messages (Email & SMS)

How to edit email messages for Appointment Reminders

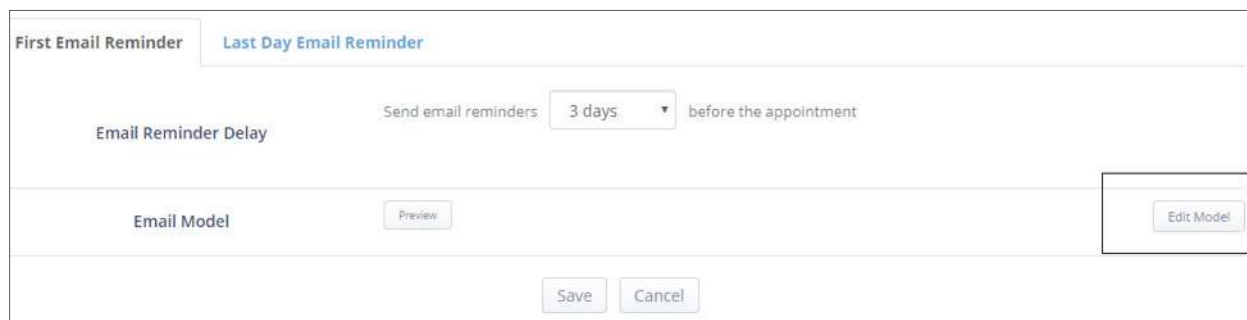
1. Setup | Client Communication | Appointment Reminders



2. Click on the tab you need to edit, click on **Setup** next to Email Reminders.

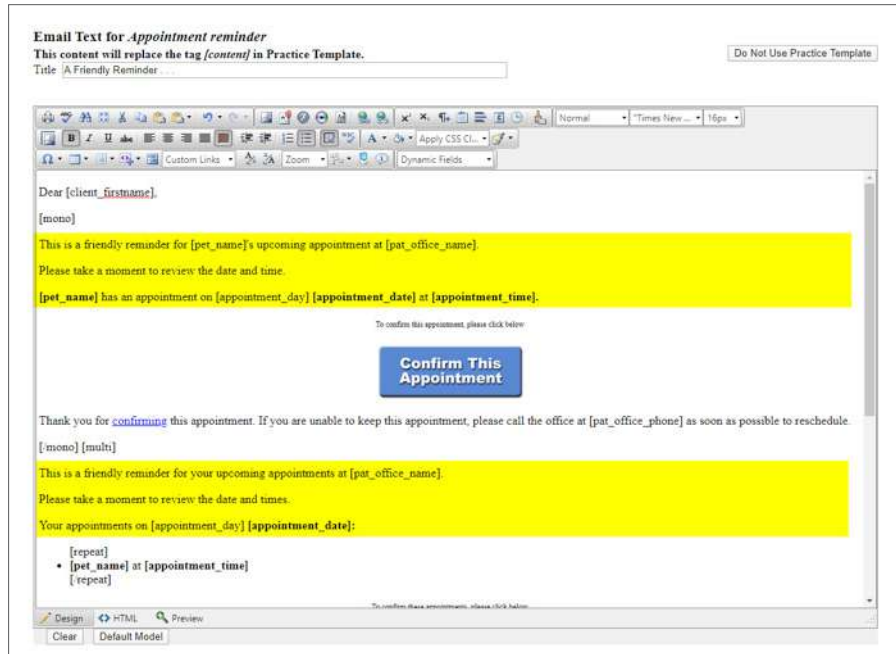


3. Click **Edit Model**.



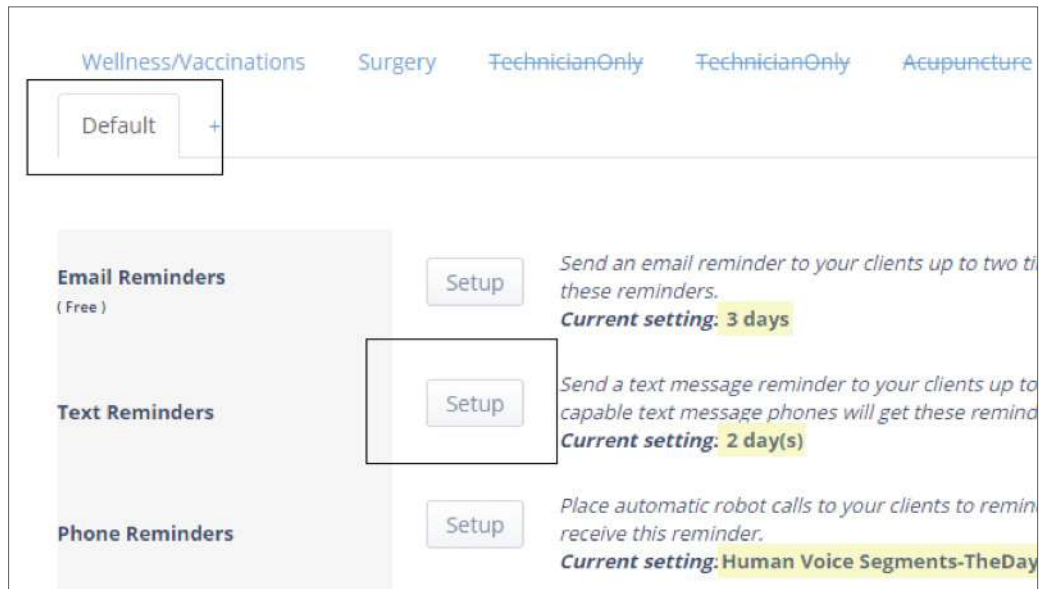
Editing Appointment Reminder messages (Email & SMS)

4. Edit both the top (single pets) and the bottom (multiple pets), save changes.



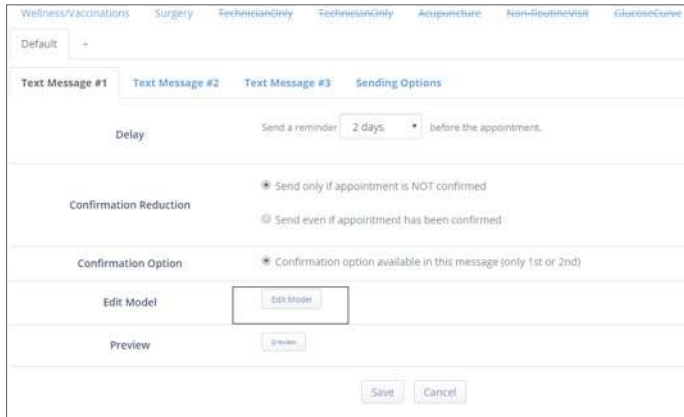
How to edit text messages for Appointment Reminders

1. Click on the tab you need to edit, click on **Setup** next to Text Reminders.



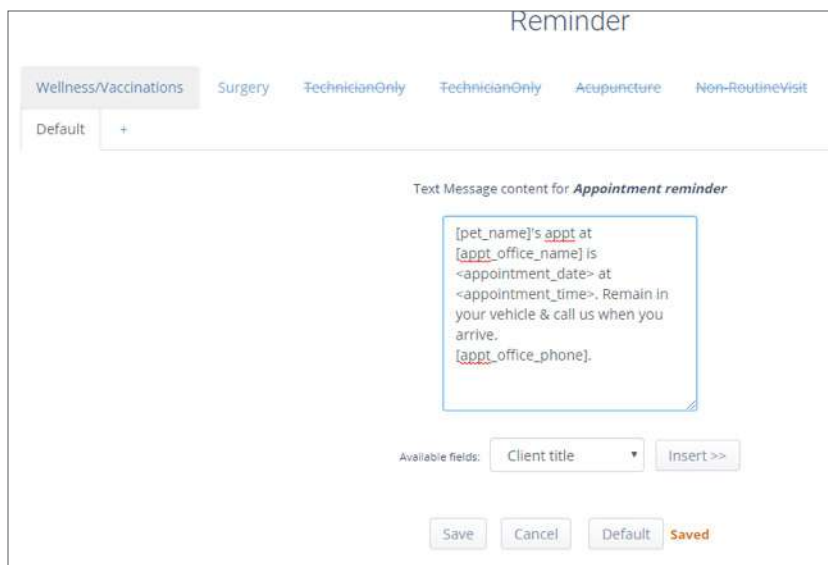
Editing Appointment Reminder messages (Email & SMS)

2. Click on **Edit Model** and edit your text. Click **Save** when finished. These changes will need to be made on each template by clicking each tab at the top and editing the models.



The screenshot shows a configuration interface for appointment reminders. At the top, there are tabs for different appointment types: Wellness/Vaccinations, Surgery, TechnicianOnly, TechnicianOnly, Acupuncture, Non-RoutineVisit, and GlucoseCurve. Below these is a 'Default' tab with a '+' icon. The main area is divided into sections: 'Text Message #1', 'Text Message #2', 'Text Message #3', and 'Sending Options'. The 'Sending Options' section includes a 'Delay' field set to '2 days' before the appointment, a 'Confirmation Reduction' section with radio buttons for 'Send only if appointment is NOT confirmed' (selected) and 'Send even if appointment has been confirmed', and a 'Confirmation Option' section with a radio button for 'Confirmation option available in this message (only 1st or 2nd)' (selected). At the bottom, there are 'Edit Model' and 'Preview' buttons, and 'Save' and 'Cancel' buttons.

We recommend staying under 160 characters on text messages. Here's an example of a text message that will be around that character count.



The screenshot shows the 'Reminder' configuration interface. At the top, there are tabs for different appointment types: Wellness/Vaccinations, Surgery, TechnicianOnly, TechnicianOnly, Acupuncture, and Non-RoutineVisit. Below these is a 'Default' tab with a '+' icon. The main area is titled 'Text Message content for Appointment reminder' and contains a text editor with the following content: [pet_name]'s appt at [appt_office_name] is <appointment_date> at <appointment_time>. Remain in your vehicle & call us when you arrive. [appt_office_phone]. Below the text editor, there is an 'Available fields:' section with a dropdown menu showing 'Client title' and an 'Insert >>' button. At the bottom, there are 'Save', 'Cancel', 'Default', and 'Saved' buttons.



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