

# Vetstreet training resources

Adapting and adjusting your  
practice workflow

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Utilizing the custom email editor to create an on-demand message to alert clients of hospital news, like emergency closures



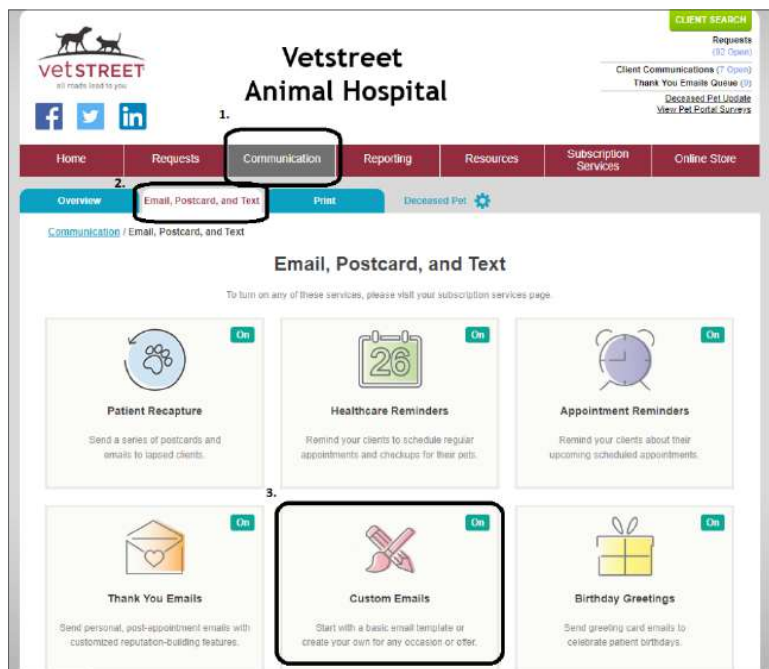
# **Creating a custom campaign to pet owners**

# Creating a custom campaign to pet owners

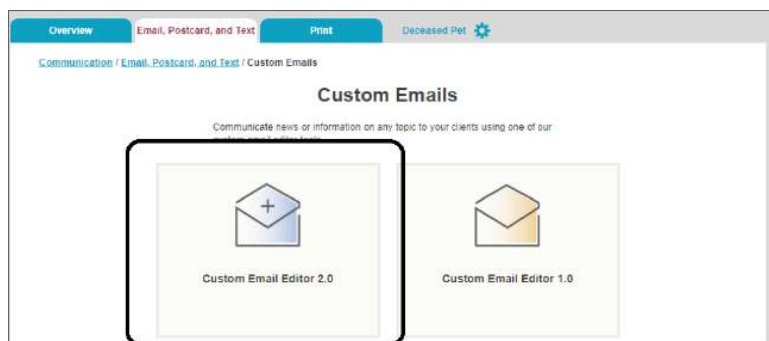
You can create a custom on-demand email message to alert your clients to any hospital news. Mailings are queued and fire four times daily, so you can even use them for last minute notifications such as emergency hospital closures.

To create a custom email, first log in to your Vet Portal.

1. Select **Communication** from the top navigation bar
2. Select the **Email, Postcard and Text** tab
3. Select **Custom Emails**



4. Select **Custom Email Editor 2.0**



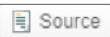
# Creating a custom campaign to pet owners

## 5. Click Create Custom Emails



## 6. Give your email a name, a subject line, and an audience, then use the free-form editor to craft your message

a) You can use the  icon to upload and then insert a picture.

b) If you have a resource that is handy with HTML, you can also click the  button to create an email that is more complexly formatted.

\* Indicates a required field.

**1. Name your email campaign.\***

Name:






































**2. Subject Line of Email.\***

Subject:

**3. Choose the audience for the Email.\***

All patients  
 Kittens (<1 yr)  Cats (1-7 yrs)  Senior Cats (>7 yrs)  
 Puppies (<1 yr)  Dogs (1-7 yrs)  Senior Dogs (>7 yrs)  
 All Horses  
 All Other patients

**4. Create your custom marketing Email.\*** Note: If you wish to use a template, please select it first. If you select it after content has been added and you wish to keep what you have written, please uncheck the "Replace Actual Contents" box on the template pop-up window.

Insert to...                                     

# Creating a custom campaign to pet owners

- When you have completed your formatting, click the **Save** button, and then send an email to yourself (or other staff) using the Send Test Emails function. (Note: You must do this at least once before you can send to your customers)

**Save** **Cancel/Reset**

### 5. Send Test Emails

The below recipients will receive a preview of your custom email. You must complete this step at least once before being allowed to continue to step 6. To send additional test messages, continue to use the "Send TEST" button in this section

Editor/Initiator:

Recipient 1:

Recipient 2:

Recipient 3:

Recipient 4:

**Send TEST**

### 6. Send to Everyone.

To send your custom email to all of your intended recipients, click 'Send ALL'. This button is only enabled after you have sent at least one test email from Step 5 and your data transfer is current. In the event that your data becomes stale, use the "Override" option to force send your message.

**Override** **Send ALL**

- Click **Send ALL\*** to send your email to our queue for deployment.



**\*Important note: Neither Vetstreet 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.**



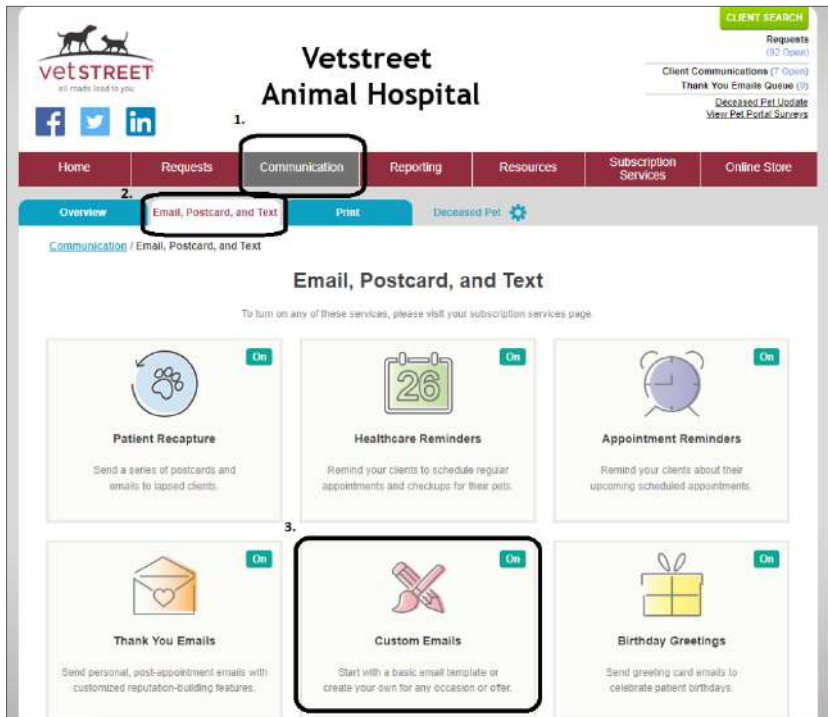
**Customizing and  
sending a pre-written  
COVID-19 email  
message to pet owners**

# COVID-19 Email Campaign Instructions

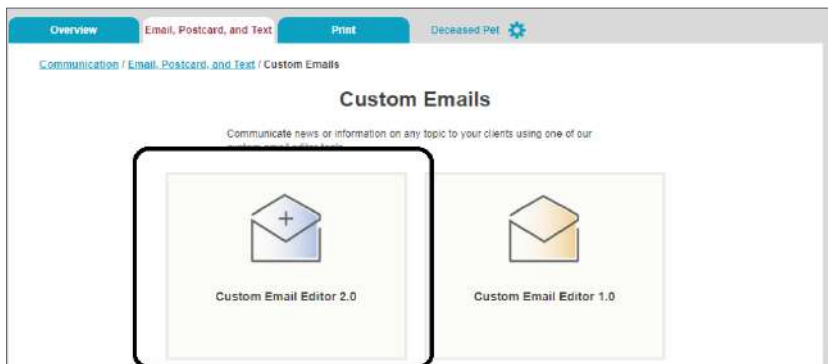
You can use the Vetstreet Email Editor to personalize a ready-made COVID-19 email message to send to your clients. Mailings are queued and fire four times daily.

To use the pre-loaded template, first log in to your Vet Portal.

1. Select **Communication** from the top navigation bar
2. Select the **Email, Postcard and Text** tab
3. Select **Custom Emails**



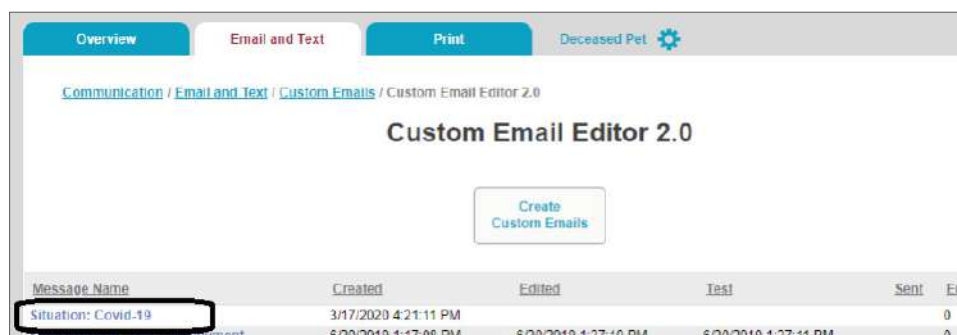
4. Select **Custom Email Editor 2.0**





# COVID-19 Email Campaign Instructions

5. Choose the **Situation: Covid-19** message already in your list of templates



6. If desired, you can modify your email's subject and audience (a suggested subject line and audience is pre-populated)

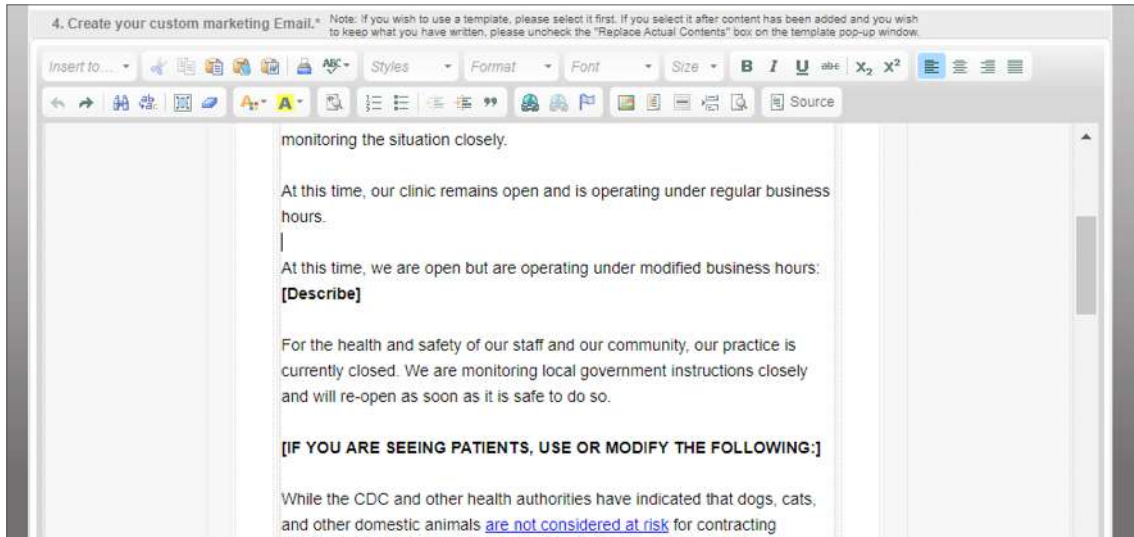
The screenshot shows the email configuration form. At the top, there is a note: '\* Indicates a required field.' Below this, there are three sections: '1. Name your email campaign.\*', '2. Subject Line of Email.\*', and '3. Choose the audience for the Email.\*'. The 'Name' field contains 'Situation: Covid-19'. The 'Subject' field contains 'An Update from us about CC'. The 'Audience' section has several checkboxes, all of which are checked: 'All patients', 'Kittens (<1 yr)', 'Cats (1-7 yrs)', 'Senior Cats (>7 yrs)', 'Puppies (<1 yr)', 'Dogs (1-7 yrs)', 'Senior Dogs (>7 yrs)', 'All Horses', and 'All Other patients'.

7. Use the free-form editor to personalize your message.

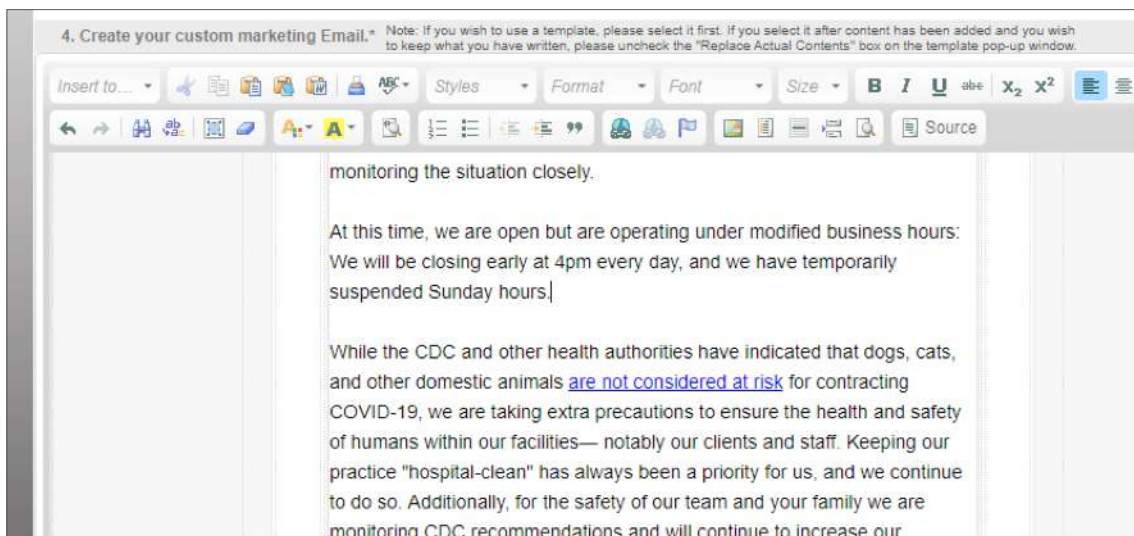
a) Be on the lookout for text in **BOLD** – this is provided to give you guidance of what text to include based on your specific situation. For example, three different introductory paragraphs are offered. You want to choose one and delete the other two, as well as the section flag. So what starts out like the figure on top will ultimately look like the image on the bottom:

# COVID-19 Email Campaign Instructions

## Before



## After

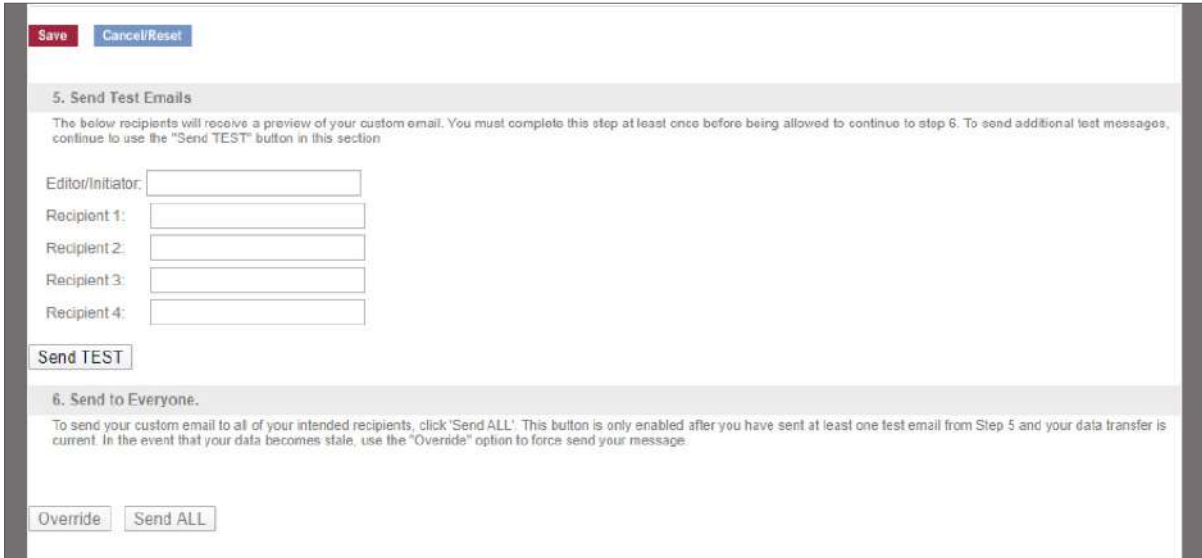


b) Also be sure to scroll all the way through the message template, as options for messaging if your hospital has closed, as well as areas to provide your hospital name, email address, and phone number are provided. As previously mentioned, be sure to delete all of the **BOLD** guidance text.

c) 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.

# COVID-19 Email Campaign Instructions

- When you have completed your formatting, click the **Save** button, and then send an email to yourself (or other staff) using the Send Test Emails function. (Note: You must do this at least once before you can send to your customers)



The screenshot shows a web interface for configuring an email campaign. At the top, there are two buttons: "Save" (red) and "Cancel/Reset" (blue). Below this is a section titled "5. Send Test Emails" with a grey background. The text in this section reads: "The below recipients will receive a preview of your custom email. You must complete this step at least once before being allowed to continue to step 6. To send additional test messages, continue to use the 'Send TEST' button in this section". There are four input fields labeled "Editor/Initiator:", "Recipient 1:", "Recipient 2:", "Recipient 3:", and "Recipient 4:". Below these fields is a "Send TEST" button. The next section is titled "6. Send to Everyone." with a grey background. The text reads: "To send your custom email to all of your intended recipients, click 'Send ALL'. This button is only enabled after you have sent at least one test email from Step 5 and your data transfer is current. In the event that your data becomes stale, use the 'Override' option to force send your message." At the bottom of this section are two buttons: "Override" and "Send ALL".

- Click **Send ALL\*** to send your email to our queue for deployment.



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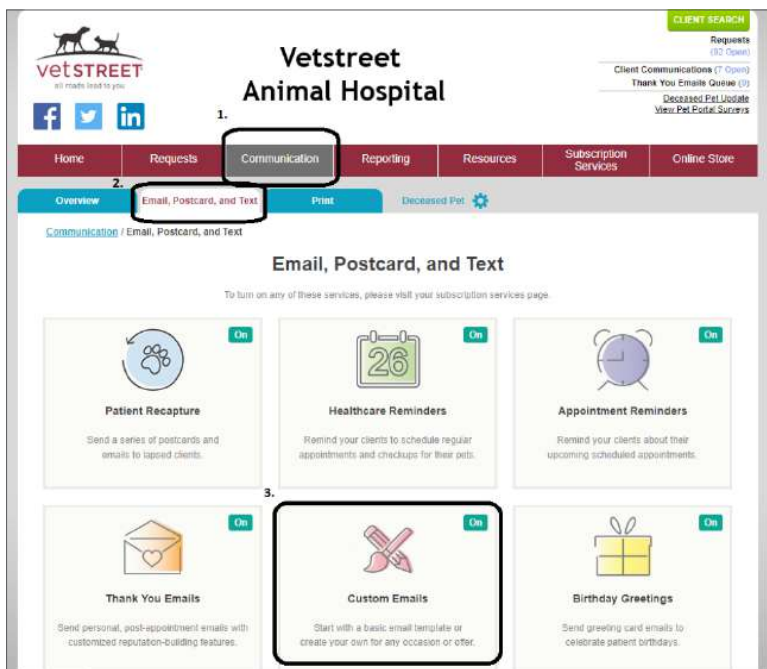
# **Sending an Emergency Practice Closure announcement**

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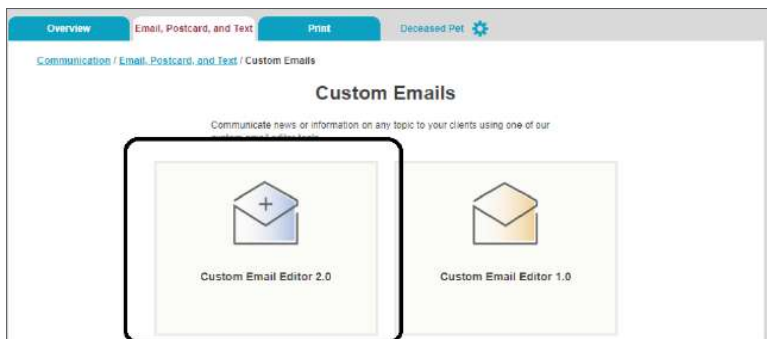
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# Sending an Emergency Practice Closure announcement

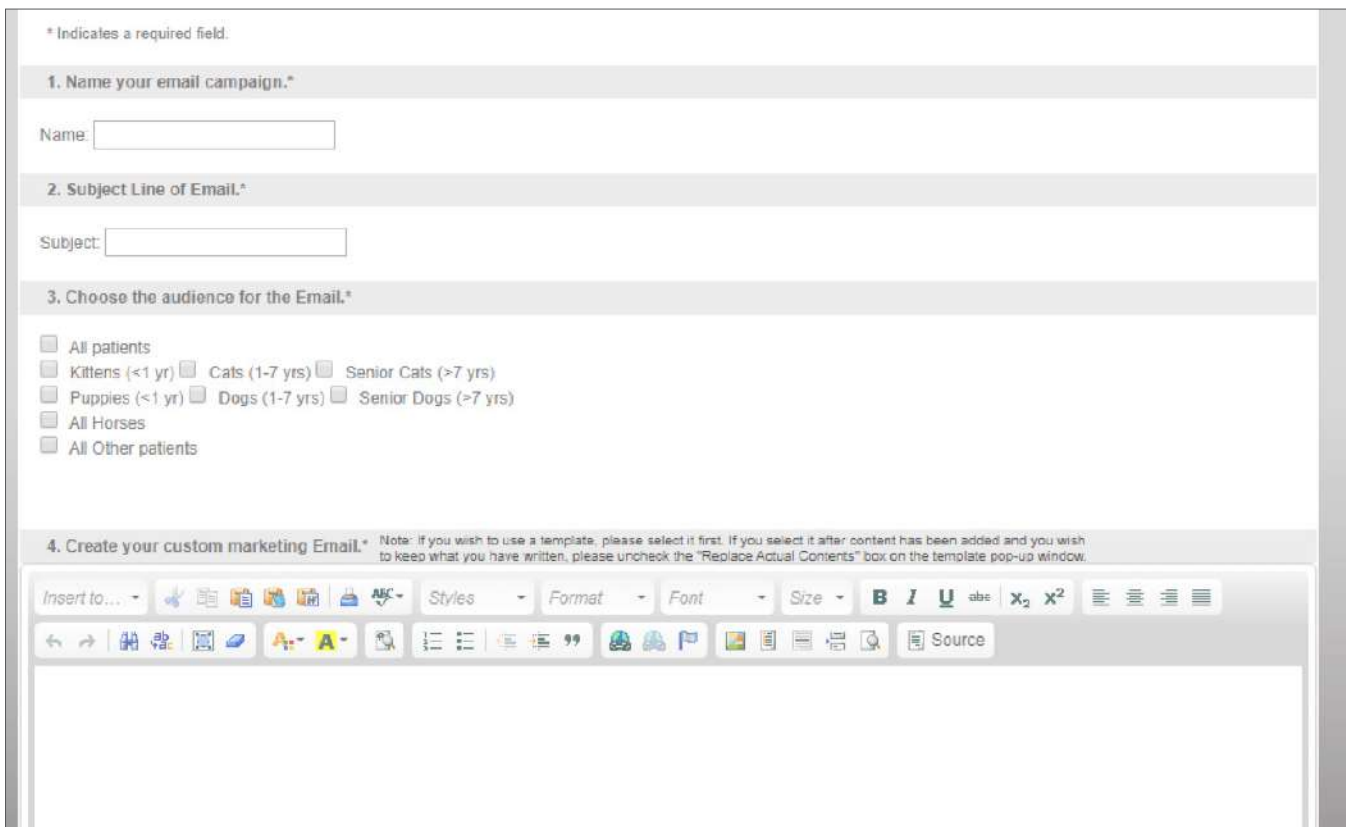
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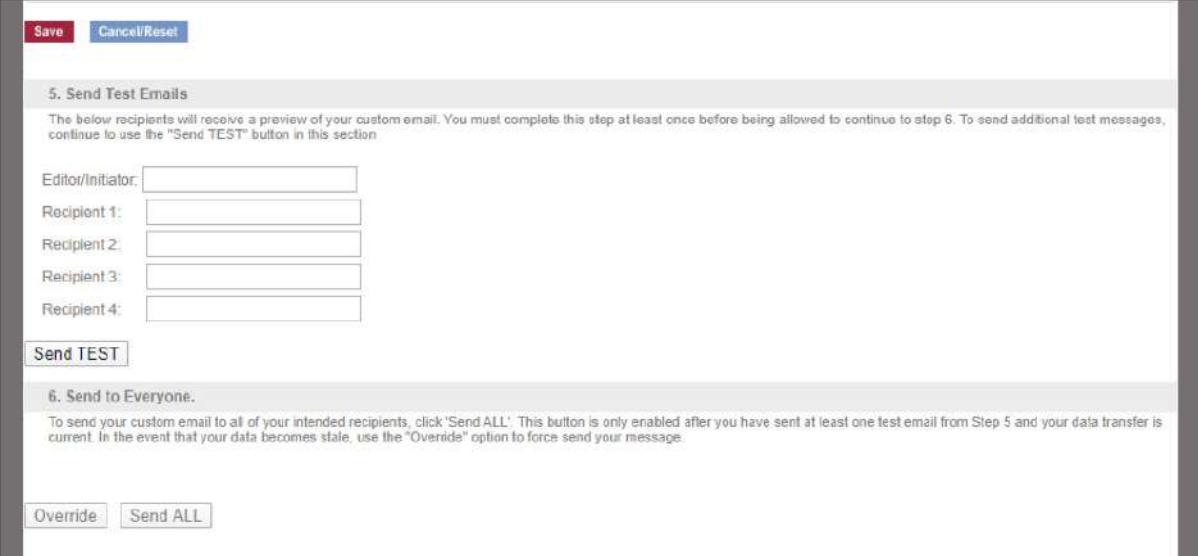
a) You can use the  icon to upload and then insert a picture.

b) If you have a resource that is handy with HTML, you can also click the  button to create an email that is more complexly formatted.



# Sending an Emergency Practice Closure announcement

- When you have completed your formatting, click the **Save** button, and then send an email to yourself (or other staff) using the Send Test Emails function. (Note: You must do this at least once before you can send to your customers)



The screenshot shows a web interface for sending test emails. At the top, there are two buttons: 'Save' (in red) and 'Cancel/Reset'. Below this is a section titled '5. Send Test Emails' with the following text: 'The below recipients will receive a preview of your custom email. You must complete this step at least once before being allowed to continue to step 6. To send additional test messages, continue to use the "Send TEST" button in this section'. There are four input fields labeled 'Editor/Initiator:', 'Recipient 1:', 'Recipient 2:', 'Recipient 3:', and 'Recipient 4:'. Below these fields is a 'Send TEST' button. The next section is titled '6. Send to Everyone.' with the text: 'To send your custom email to all of your intended recipients, click "Send ALL". This button is only enabled after you have sent at least one test email from Step 5 and your data transfer is current. In the event that your data becomes stale, use the "Override" option to force send your message.' At the bottom of this section are two buttons: 'Override' and 'Send ALL'.

- Click **Send ALL\*** to send your email to our queue for deployment.



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