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Rapport®
User's Guide

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Rapport User's Guide

Overview

Rapport provides client communication for better workflows, better connections with clients, and better patient care to improve the veterinary business with compliance and outcomes. This guide will provide the step-by-step instructions to set up automated reminders, online appointment scheduling, and telemedicine.

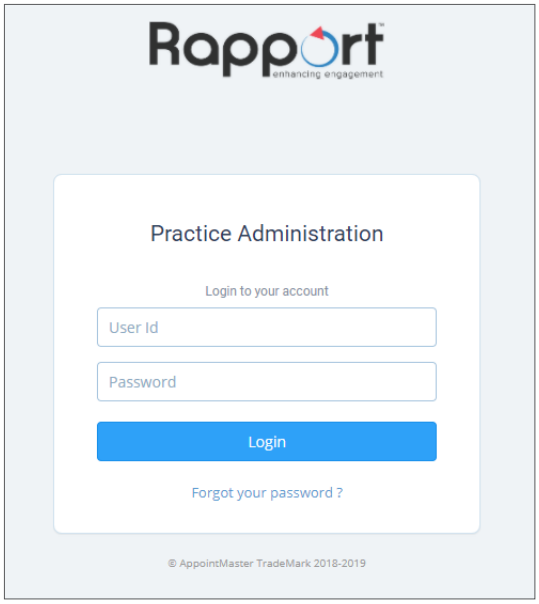
Getting Started

Begin by logging into Rapport. The following is recommended when using Rapport:

- A stable Internet connection.
- Use Google Chrome as the default browser.

Logging In

1. In the address bar of the browser, enter the appropriate URL which is listed below. ***It is recommended the URL be saved as a favorite for future use***.
   - **AVImark users**: https://rapport.appointmaster.com/bin/login.aspx
   - **ImproMed users**: https://rapport2.appointmaster.com/bin/login.aspx
   - **eVetPractice users**: https://rapport3.appointmaster.com/bin/login.aspx
   - **No Covetrus practice management software**: https://rapport4.appointmaster.com/bin/login.aspx
2. After entering the URL, the Rapport Login screen will appear.
3. Type in the User ID and Password.
   - The user can click the **Forgot your password?** link if they forgot their password. Follow the instructions to reset the password.



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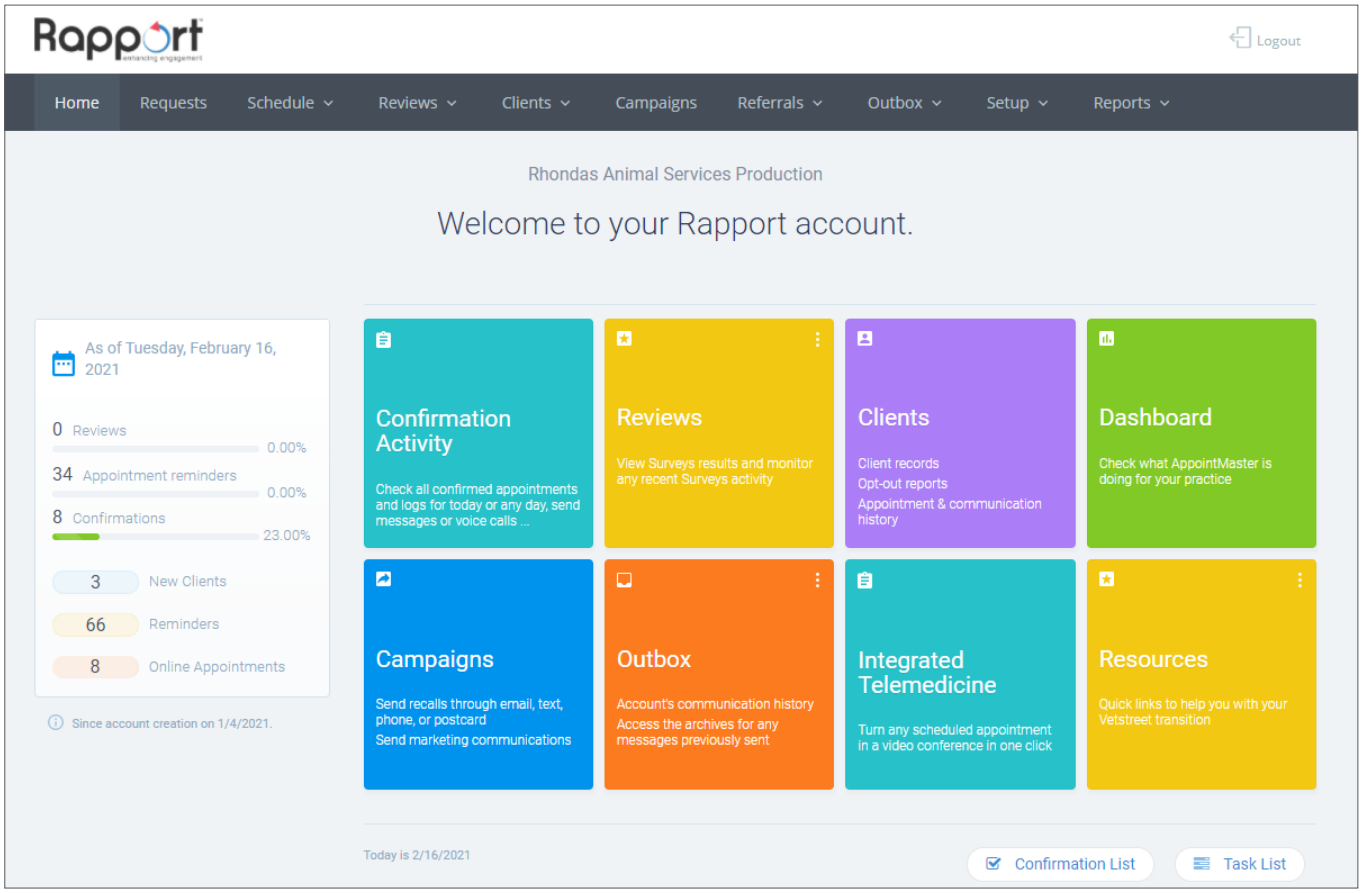
- If the user is still having difficulty logging in after resetting the password, they should contact the Client Communication Support team at **855-950-9099**.

4. Click **Login**.

The Rapport home screen will appear.

The Setup menu is hidden from staff/front desk users where Admin users will have access to those areas.



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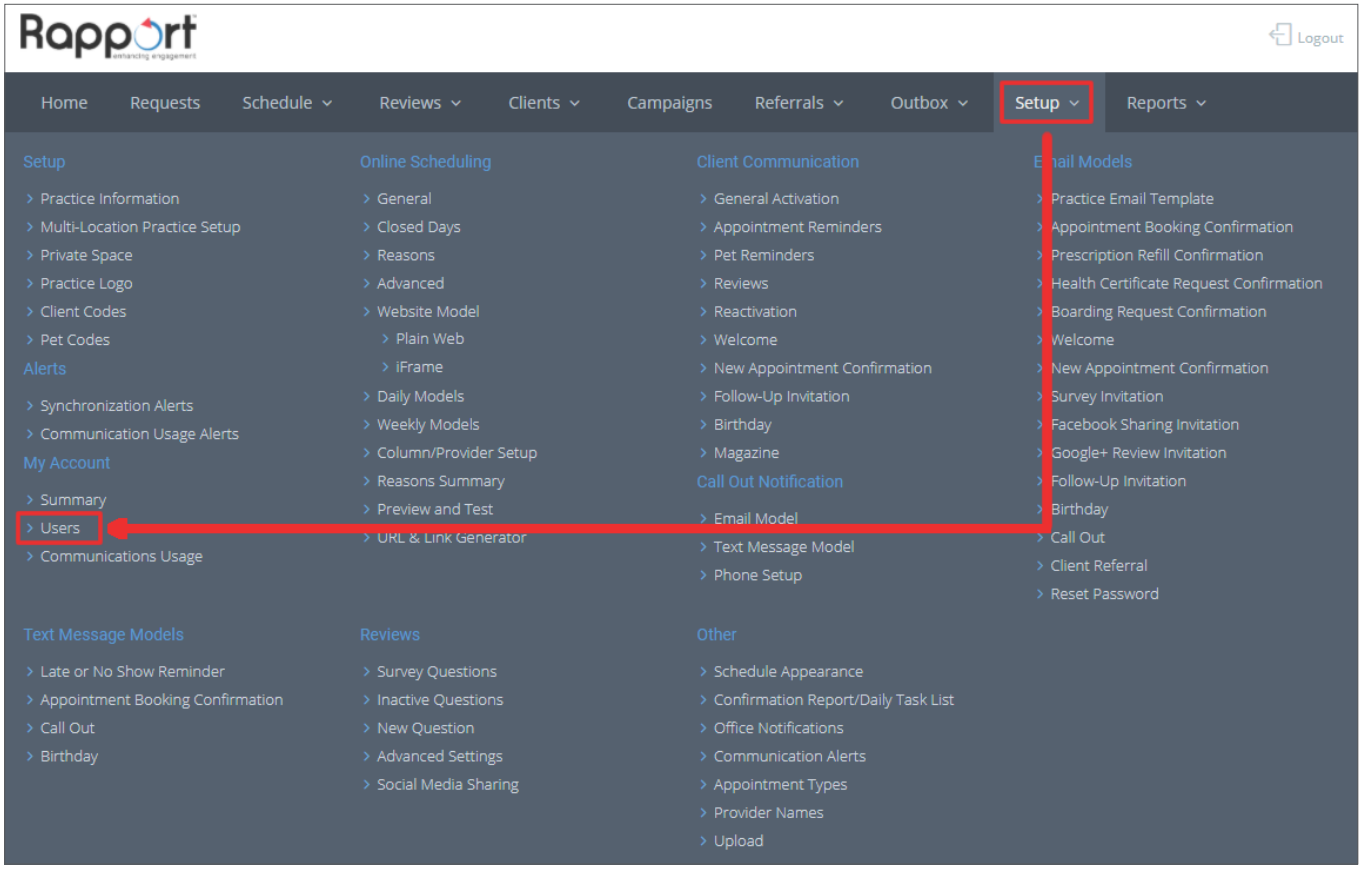
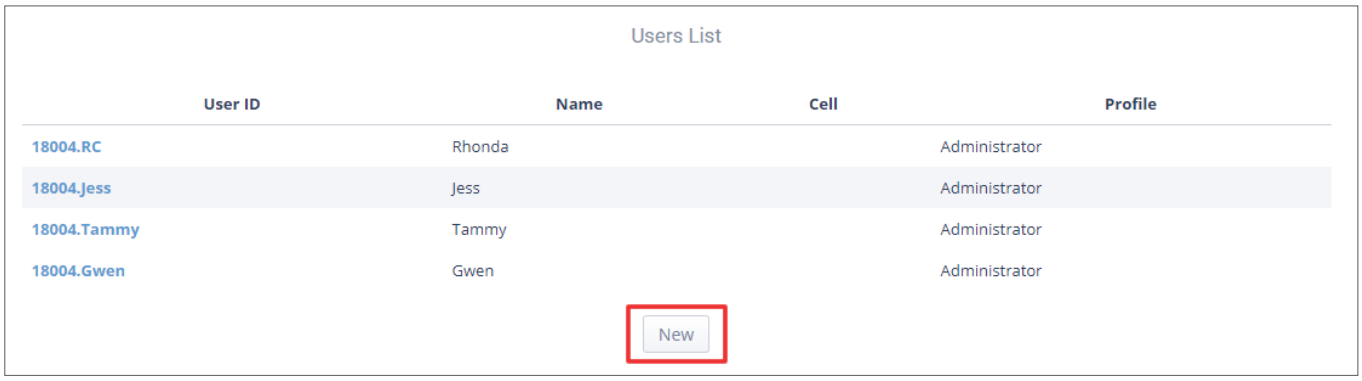
Add a Rapport User

Add additional users to the practice's Rapport account from the Setup screen.

1. From the Rapport Navigation Bar, click on **Setup > Users**.



2. From the **Users List**, click **New**.



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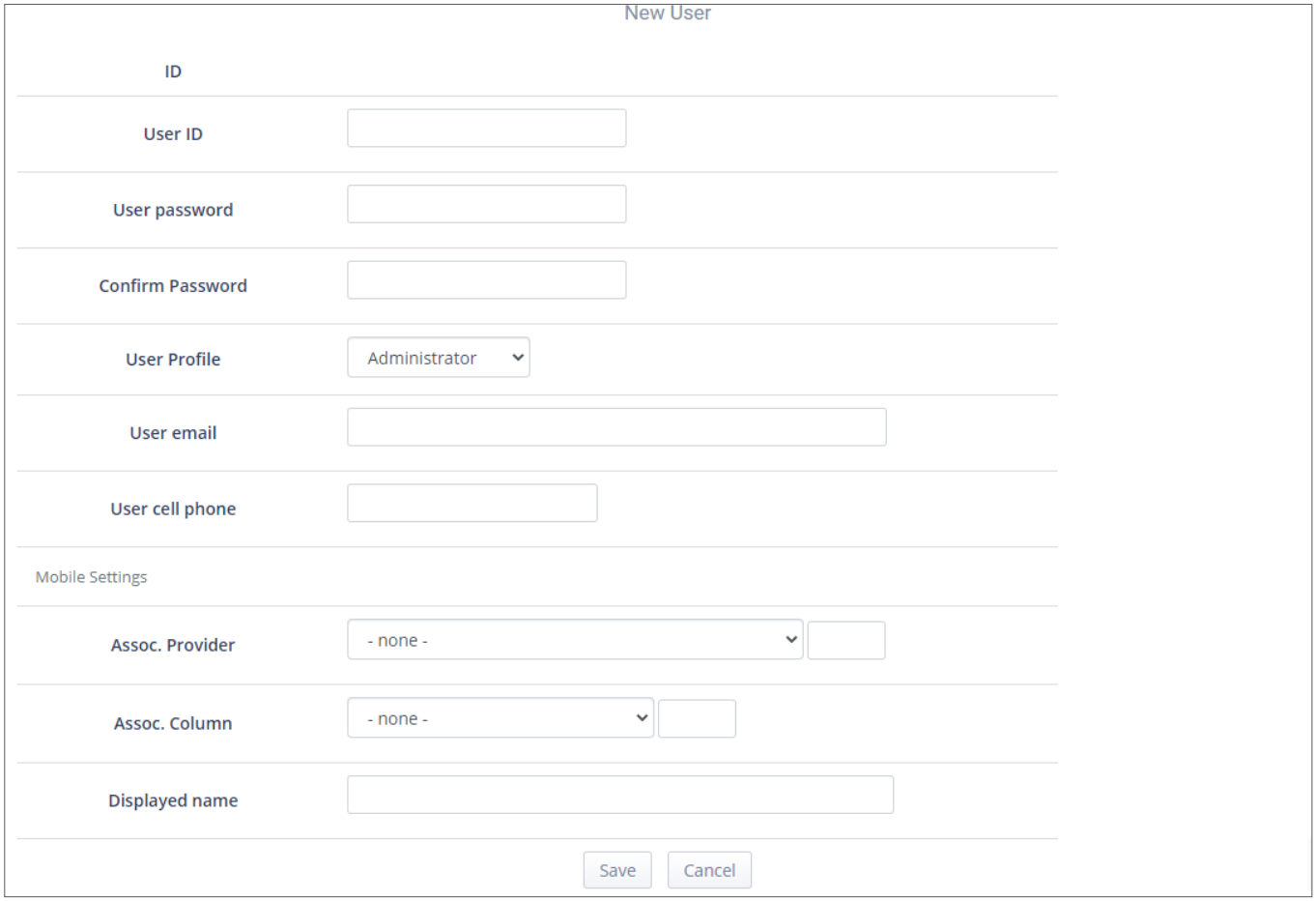
3. Fill in the **New User** information on the user profile screen.

   Required fields:

   - User ID
   - User password and Confirm password
   - User Profile
   - Displayed name

   Recommended fields:

   - User email
   - User cell phone



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- **User ID:** It is recommended to preface the user ID with the account number. For example, if the Rapport account number is 12345, enter 12345.JDoe.
- **User Profile:** The user profile establishes the rights a user will have when working in Rapport.
  - **Administrator** allows the user access to all areas of Rapport and the ability to make changes.
  - **Front desk assistant** has rights to manage communication preferences, surveys, and edit the content of email and text messages. Front Desk Assistant cannot make changes to Online Scheduling settings or communication delivery settings.
  - **Marketing assistant** has access to the Rapport media center (campaign area) but restricts access to view client information.
- **User email:** This is not a required field; however, it is recommended. Rapport uses the email address to send the user a reset password email in the event users forget their password.
- **Displayed name**: The name entered in this field is the name that will show on the Rapport screen when the user is logged in.

Edit a Rapport User

Rapport users are able to update their username and password at any time.

1. The user must log into Rapport.
2. From the Home screen, click on **Setup > Users**. A list of current Rapport users assigned to the account will be displayed.
3. The user clicks on their User ID.
4. From the User Profile screen, the user may click **Change** to edit the User ID or Password.
5. Click **Save**. A message confirming the change will appear under the Save button.

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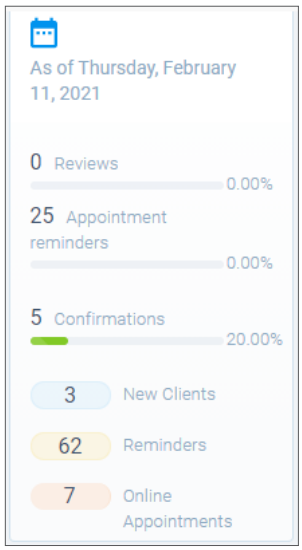
Rapport Home Page

There are two major areas to the Rapport home page: **Tiles** and the **Navigation Bar.** Following is a brief overview of both areas.

Tiles Overview

Daily Summary

The white tile on the home page provides a summary of how Rapport is doing since the creation of the account.



- **Reviews** tracks the number of reviews received and posted to the practice's Rapport Reviews page. The percentage on the right side is the percentage of clients who responded.
- **Appointment Reminders** is the number of reminders sent and the percentage of clients who responded.
- **Confirmations** is the number and percentage of confirmed appointments.
- **New Clients** is the number of new clients added to the practice's practice management software.
- **Reminders** is the number of reminders (health care) sent from Rapport.
- **Online Appointments** are the statistics for online appointments booked. Online Scheduling can be enabled for compatible Covetrus® practice management software. Contact a Covetrus sales specialist at **800-874-1446**.

The tiles on the home page provide the user quick access to the various areas of Rapport. Click on a tile to access the features described on the tile.

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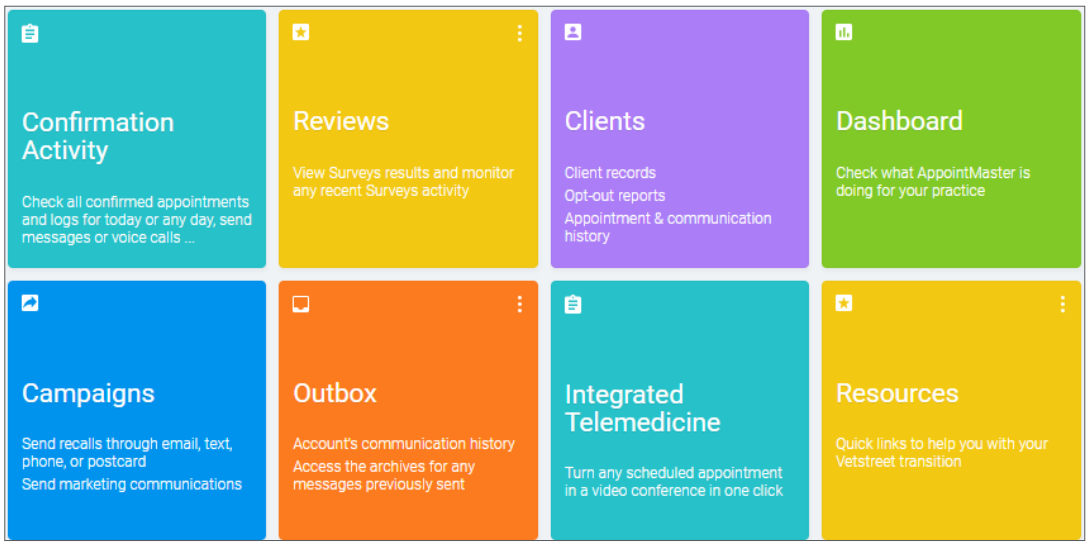

Confirmation Activity

View appointments, confirmed or unconfirmed, for the day selected. There are links to provide easy access to all client, patient, and appointment information.

Reviews

From the Reviews tile, view survey results and recent survey activity. Click on the tile or click on ⋮ to display tiles for Results Summary, Recent Reviews, Recent Surveys, and Setup.

Clients

Click on the Client tile to view client records, obtain opt-out reports, and view appointment and communication history.

Dashboard

The Dashboard provides information about how Rapport is doing for the practice since the account was created.

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Campaigns

Send out bulk marketing communications via email or text. Postcards is an option available to a targeted group of clients for users of a Covetrus practice management software.

Outbox

This tile provides access to Rapport's communications archives to view any message previously sent.

Integrated Medicine

When selecting this tile, the system redirects the user to the Covetrus website and introduces them to Rapport's telemedicine feature.

Resources

This tile gives the user access to quick links to help with the Vetstreet transition.

Other Home Page Links

Confirmation List

Click on the Confirmation List link for a list of dates/days to choose from. Once the date selection has been made, Rapport opens the Daily Confirmation Summary Report.

Task List

Click on the Task List link for a list of dates to choose from. Once the selection is made, Rapport opens the Daily Task List Report. This report provides a summary of all appointments scheduled on a particular day, with an expanded view of any reminders that have been sent related to the appointment. It also provides important information for each scheduled appointment along with missing information from clients you may want to collect during their visit.

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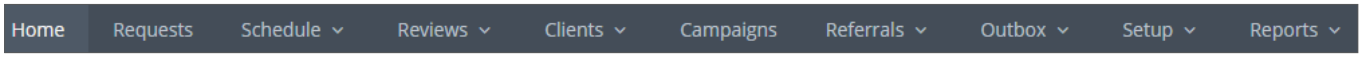
The Navigation Bar

The Navigation Bar, located at the top of the Rapport home page, provides quick access to all areas of Rapport.



Navigation Bar Links

Home

If the navigation bar is available, the **Home** link will bring the user back to the Rapport home page.

Requests

The Requests link provides a list of requests and status for appointment confirmation, client communication, and boarding.

Schedule

Clicking on Schedule displays appointments for the current day. However, the user is able to use the date navigator to move from one day to the next or click on the current date to display the monthly calendar then select a specific date.

This would be used for real time online scheduling and can be enabled for compatible Covetrus practice management software. Contact a sales specialist at **800-874-1446** to learn more about this feature.

Reviews

Reviews will display a summary of results for surveys and reviews, When the user moves the mouse over the Reviews link, they are provided with the option for Recent Reviews, Recent Surveys, and Setup.

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Clients

The Clients page will display a list of the practice's clients. The user can move through the list using the Page **next** link or **prev** link. An alphabetic list is also available to filter the list based on the client's last name.

Sub-menu options from the main Clients menu include:

- All Clients
- Opt-Out Clients
- Modified Clients
- All Online Clients
- Client Reports

Campaigns

The Rapport Media Center will display when Campaigns is clicked on. The user has the option to select the type of campaign to view or create (New). Under Reports, the user can view the Duplicate Report, Wrong Emails report, Email CSV File, and the One Time Campaign Reports. Under Setup, the user can view General Practice Information, My Resources, Templates, Users & Notifications, and there is the option to Return to Practice Administration (useful since the navigation bar does not show), and the option to Logout.

Referrals

From the Referrals link, create or view referrals from veterinarians or clients (also referred to as Office Referrals).

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Outbox

The Outbox page will show communications to or from client on the current day. There is a calendar on the page so the user may select a different date. From the Outbox sub-menu, a user may select any of the following:

- All Recent Communications
- Email Archives
- Text Message Archives
- Phone Call Archives
- Custom Report

Setup

Clicking on Setup returns the user to the Rapport home page. However, if the user moves the mouse over Setup, a screen with the following setup options will appear:

- **Setup**
  - Practice Information
  - Multi-Location Practice Setup
  - Private Space
  - Practice Logo
  - Client Codes
  - Pet Codes
- **Alerts**
  - Synchronization Alerts
  - Communication Usage Alerts
- **My Account**
  - Summary
  - Users
  - Communications Usage
- **Text Message Models**
  - Late or No Show Reminder
  - Appointment Booking Confirmation
  - Call Out
  - Birthday
- **Online Scheduling**
  - General
  - Closed Days
  - Reasons
  - Advanced
  - Website Model
    - Plain Web
    - iFrame
  - Daily Models
  - Weekly Models

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- Column/Provider Setup
- Reasons Summary
- Preview and Test
- URL & Link Generator

- **Reviews**
  - Survey Questions
  - Inactive Questions
  - New Question
  - Advanced Settings
  - Social Media Sharing
- **Client Communication**
  - General Activation
  - Appointment Reminders
  - Pet Reminders
  - Reviews
  - Reactivation
  - Welcome
  - New Appointment Confirmation
  - Follow-Up Invitation
  - Birthday
  - Sympathy
  - Magazine
- **Call Out Notification**
  - Email Model
  - Text Message Model
  - Phone Setup
- **Other**
  - Schedule Appearance
  - Confirmation Report/Daily Task List
  - Office Notifications
  - Communication Alerts
  - Appointment Ty[es
  - Provider Names
  - Upload
- **Email Models**
  - Practice Email Template
  - Appointment Booking Confirmation
  - Prescription Refill Confirmation
  - Health Certificate Request Confirmation
  - Boarding Request Confirmation
  - Welcome
  - New Appointment Confirmation
  - Survey Invitation
  - Facebook Sharing Invitation
  - Google+ Review Invitation
  - Follow-Up Invitation
  - Birthday
  - Call Out
  - Client Referral
  - Reset Password

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Reports

From the Navigation Bar, click on Reports to see the reports for viewing records or printing.

- **Compliance**
  - Reminder Compliance
- **Communications**
  - Emails Statistic
  - Emails Report
  - Unsubscribed Report
  - Wrong Emails
  - Custom Reports
- **Print**
  - Reminder Postcards Report
- **Activity**
  - Pet Reminder Activity
  - Reactivation Activity
  - Appoint Reminders
  - Survey Invitations
  - Online Appointments
  - Boarding Requests
  - Refill Requests
- **Clients**
  - Pet Owner Statistics
  - Aged Pet Report
  - Duplicate Active Clients
  - Duplicate All Clients
  - New Clients
  - Opt-Out Clients
  - Opt IN/OUT Detail Report
  - Clients Reachability Statistics
  - Reactivation Potential
- **More**
  - Dashboard
  - Export CSV Email File

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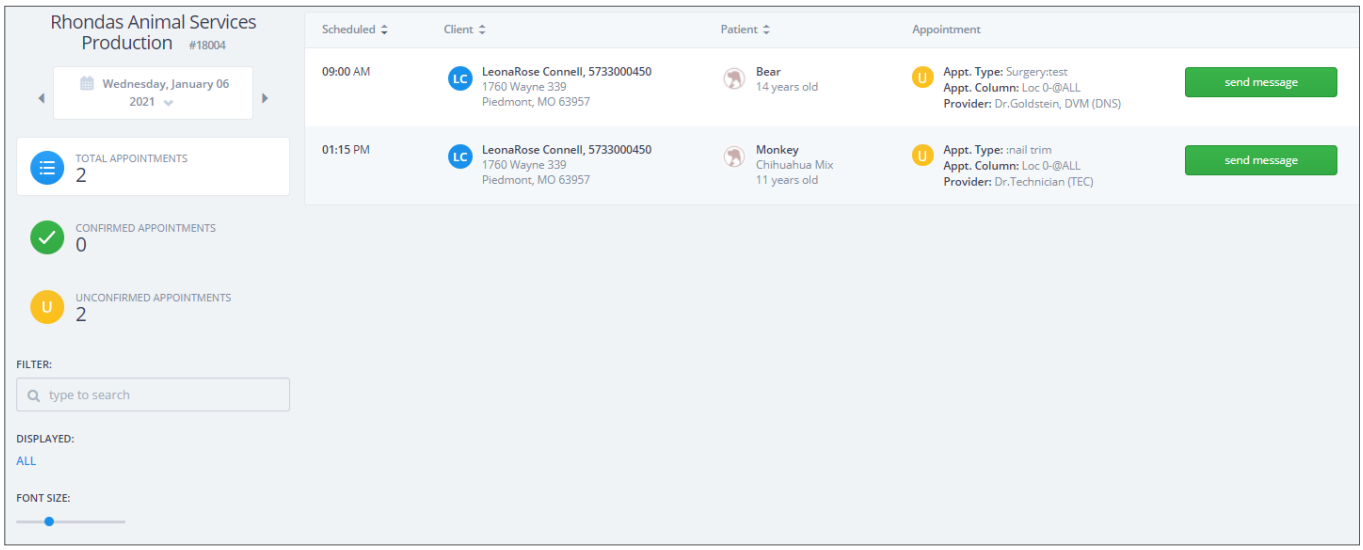
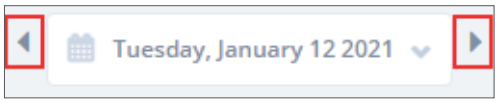
Confirmation Activity

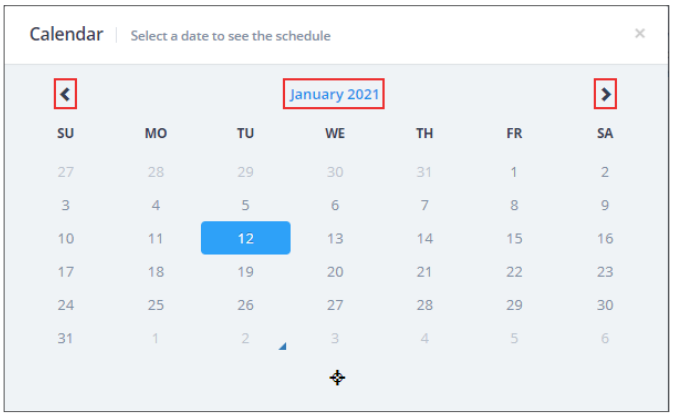
Click on the Confirmation Activity tile to manage appointments and logs for the current day or selected day. Send text messages and calls.



Date Navigation

Confirmation Activity will default to the current date when opened. On the date navigator, use the navigation buttons to move to a different day. Click on the day/date to display the monthly calendar.





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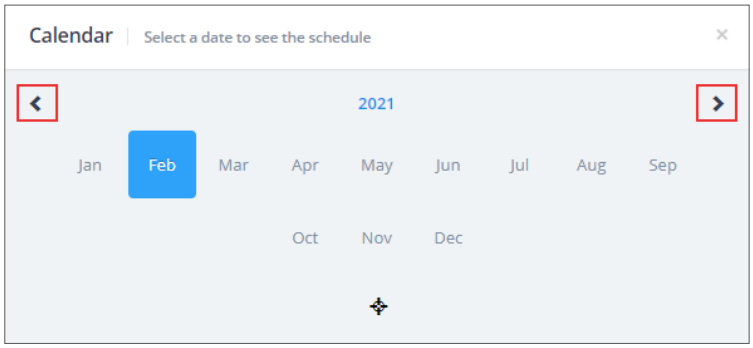
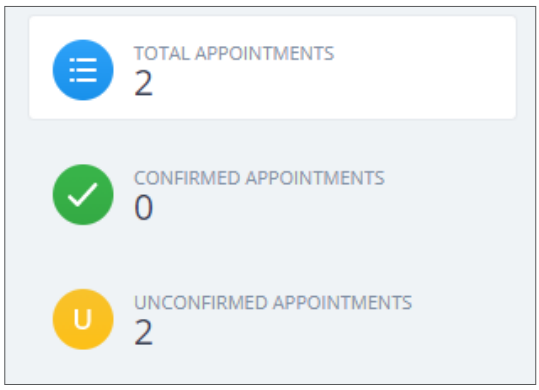
On the monthly calendar, use the navigation buttons to move to a different month. Click on the year link to display the year/month calendar. Use the navigation buttons to select a different month. Click on the year link to display past and future years, then select the year to view.



Appointment Summary

The user, at a glance, can view the number of appointments for the selected day and how many of the appointments have been confirmed or not yet confirmed.



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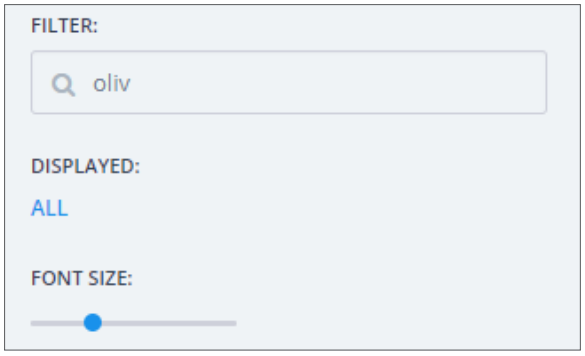
Appointment Filter

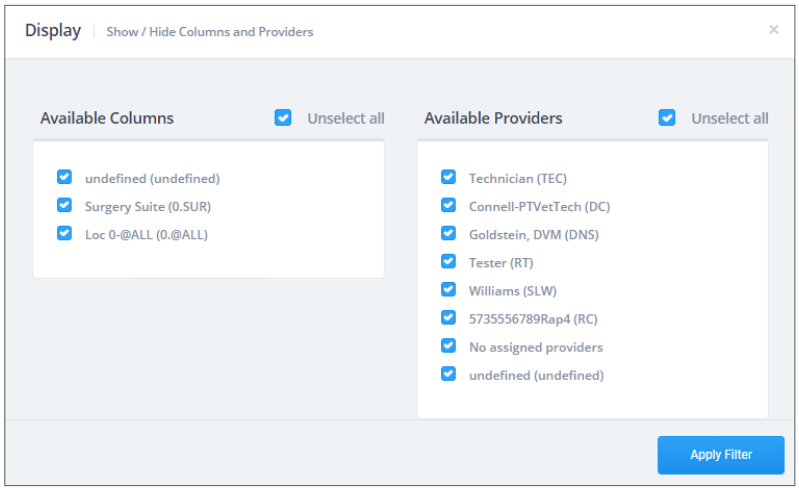
If the user is looking for a particular appointment, and there are several appointments scheduled for the day, the user can enter a filter to display appointments that meet the criteria.



In the search field below **FILTER**, enter the word or first few letters of the word to be searched. In the image above, the filter will display any client or patient with the letters in their name. Delete the letters to clear the filter.

To narrow the search further, click the **ALL** link below **DISPLAYED**. The Display screen will appear. To clear an **Available Column** or **Available Providers**, click the mouse in the check box to clear the check box. Any column or provider not selected will not show when the filter is applied. If there are several items listed for columns and providers, click the links for **Unselect all** to clear all check boxes. The user can then check the column(s) and provider(s) to include in the search.

When the selections have been made, click **Apply Filter** to view the records that match the criteria.



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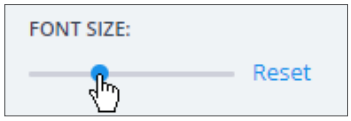
Font Size

To increase or decrease the size of the text displayed, click and drag the font size slider for the desired font size.



Click the **Reset** to set the font size back to the default setting.

Appointments

Change Appointment Sort Order

Click on any appointment column header to change the sort order. Click on **Scheduled** to sort by appointment time. Click on **Client** to sort client names in ascending or descending order. Click on **Patient** to change the sort order of patient names.

Appointment Details

From the appointments, the user can view more information about the client such as name, address, email address, and contact numbers.

- **Pet Reminders:** This will show the type of reminder sent—if text or email. The date of the pet reminder is displayed, the reason (Event), and who it was sent to.
- **Appointment Reminders:** This tab shows appointment reminders and if sent by text or email, status (Event), and who the reminder was sent to.
- **Others:** On this tab, the user will see other text messages or emails sent to the client, when they were sent, and the reason (Event).

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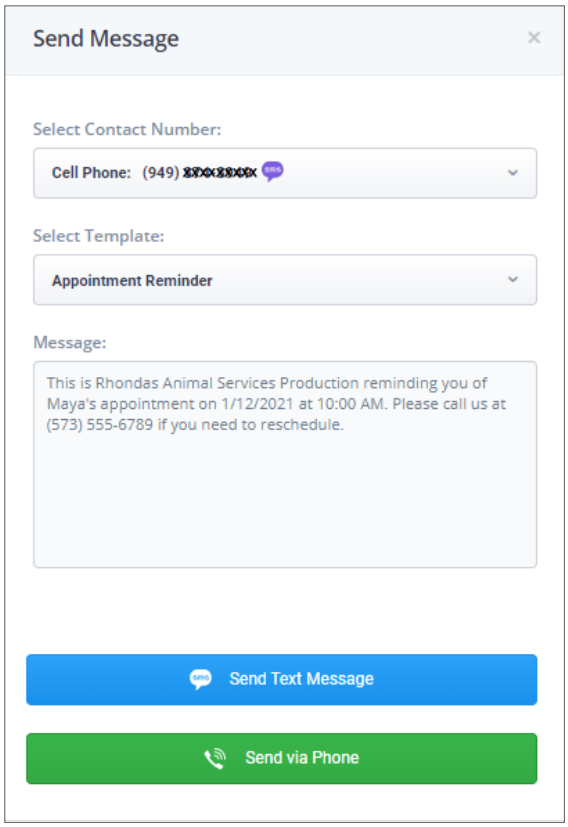
Send Message

Send a message to the client via text or phone, if the option is available.

If another number is available and to be used for sending messages, select the number from the **Select Contact Number** list.

From the **Select Template** drop-down list, select the message to send to the client. The message will appear in the **Message** box.

When ready, click **Send Text Message** or click **Send via Phone**, whichever is the preferred method of communication.



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Reviews

Click on the Reviews tile to view surveys and monitor recent survey activity. The following tiles will display:

- **Reviews:** Clicking on this tile returns the user to the Rapport home page.
- **Results Summary:** This tile will display a screen that will show the results of surveys.
- **Recent Reviews:** This tile will display a screen that will show the results of reviews.
- **Recent Surveys:** The user can view the detailed results of surveys that have been posted.
- **Setup:** From the Client Review Setup screen, adjust settings, survey questions, inactive questions, create new questions, insert reviews to the practice website, invite clients to post reviews on social media.

Clients

From the Clients tile, view client records, opt-out reports, appointment and communication history. After clicking on the Client tile, all clients are displayed with the option to search for a client or click on the letter to filter the list of clients. A **next** link and **prev** link will be available to page through the client list.

Click on the client to display the client record. From this screen, the user is able to view the following tabs:

- **General:** Display the client name and address. Generate a password or a one-time access code. Click on the patient's name to view the patient's record. Check if portal access is available.
- **Preferences:** This page will show preferences for email, text messages, and voice calls. The Preferred Email and Preferred Voice Number can be defined.
- **Preferences by Activity:** On this screen, use the check boxes to accept or reject if Appointment Reminders, Pet Reminders, Practice Personal Messages, or Marketing messages may be sent.
- **Communications Log:** Click the **Load Communications History**. Check the option, if needed, to I**nclude communications attempt not completed because of preferences**. After clicking the Load... button, the user will see **Communications sent/receive To/From Client Directly** and **Communications sent/receive To/From any client contacts**.

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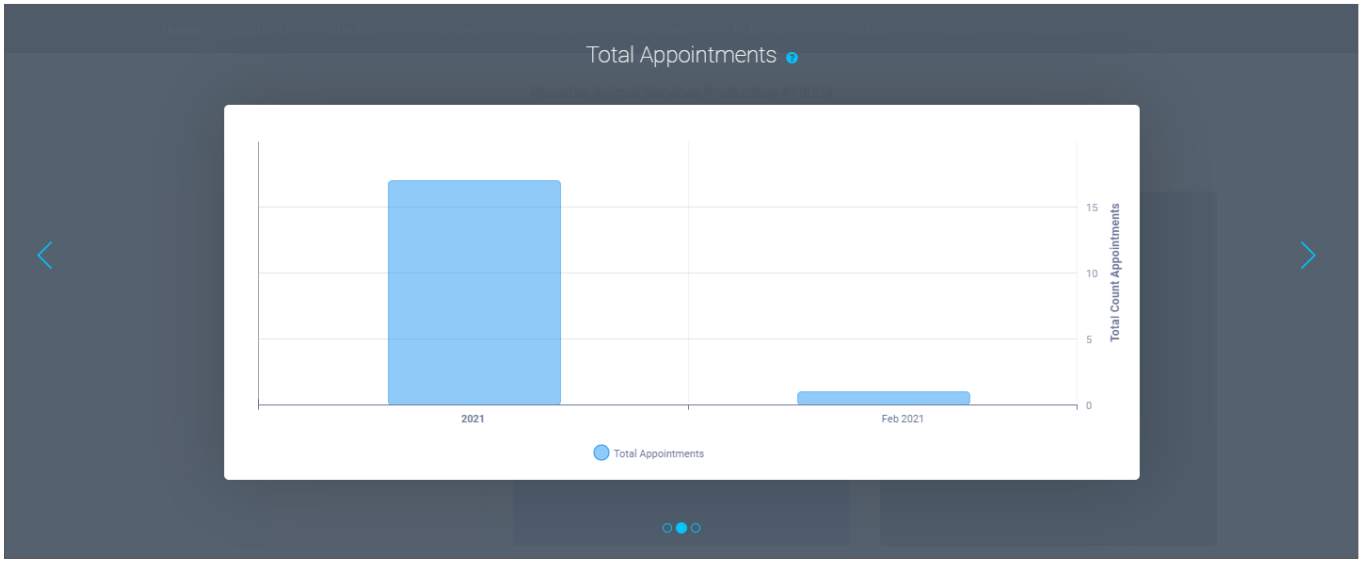
- **Appointments:** Displays appointments this client has scheduled. Click on the Appointment Date to view appointment details.
- **Instant Virtual Visits:** This screen lets the user begin a virtual visit for the patient selected. Directions to start the virtual visit are displayed on the page.

Dashboard

From the Dashboard page, view the results for **Appointments made online**, **Appointments generated**, and number of **New Clients**. Clicking on each tile, within the Dashboard, will display a graph of the results. Click on the **<** or **>** links to move from one graph, within a tile, to another.

Click on , located in the upper-right corner, to close the graph.



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Campaigns

Send recall and marketing communications through email or text from the Campaigns tile. After clicking on the Campaigns tile, the Rapport **Media Center** page opens.

Postcards are available for Covetrus practice management software only.

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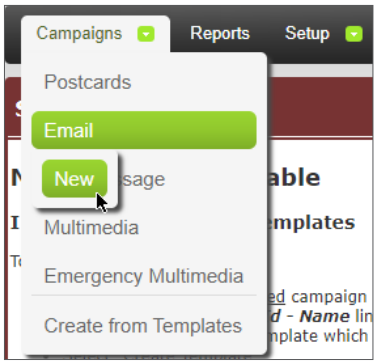
Campaigns

View existing campaigns or create new campaigns. Campaigns can be created for Postcards, Email, Text Message, Multimedia, and Emergency Multimedia. There is also the option to create a campaign from templates.

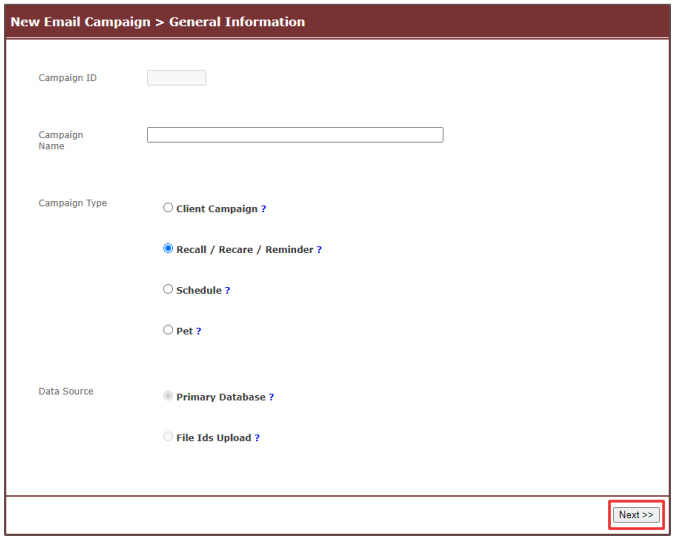
Non-Covetrus practice management software will not have the options to do Postcards, multimedia, or Emergency closing.

To create a new campaign, click on **Campaigns >** mouse-over the media for the campaign **> New**.



The New Campaign page will display. Fill in the required information for the new campaign, then click **Next**. Use the **Back** button to move back to the previous screen.

For each new screen, click on the required options for the campaign and continue to click **Next**. When the new campaign is created, on the last screen, review the campaign criteria for accuracy. Click on the **edit** links to make any changes necessary, then click the **Save Campaign** button.



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Reports

The following reports can be generated from the Campaigns tile:

- **Duplicate Report:** Lists duplicate patients in the practice database.
- **Wrong Emails:** List of patients with an incorrect email address.
- **Email CSV File:** List of patients in the database with a valid email ready to download as a csv file for future use in Microsoft® Word®, Excel®, or other database choice.
- **One Time Campaign Reports:** Lists of patients contacted from a specific OTC campaign.

Setup

- **General Practice Information:** Sub-tabs are available for the user to view the company information, other offices, the Account Status, view species, and check the version of Rapport.
- **My Resources:** This tab is where the user can upload files that can be displayed on the practice's private space.
- **Templates:** Instructions for creating templates will appear on this page. Once templates are created, they will appear.
- **Users & Notifications:** At the time of this writing, this feature is not available.

The user also has the option to return to the Rapport home page or logout of the program.

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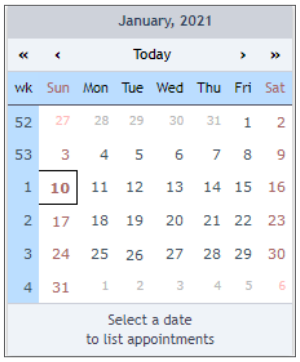
Outbox

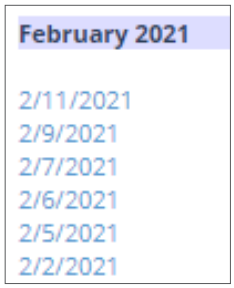
From the Outbox tile, the user is able to access the archives for any messages previously sent.

Outbox Communications

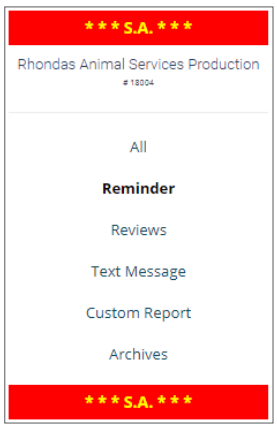
Upon opening any of the Outbox tiles, archives for the selected outbox will display date links for communications sent on the date selected. Click on a date link to view who the communications were sent to on that date. Click on a communication link to view the actual communication sent to the client.

From the main Outbox page, use the calendar to select a date and view appointments for that date. Use the navigation buttons to move from one month to the next. Click on a date to view the communications. Click on the link for a communication to see more details.





Filter appointments by type. By default, **All** will be selected. To view only Reminder messages, click on **Reminder**. To view only text messages, click on the link for **Text Message**. Review the steps on the following page to create a custom report.



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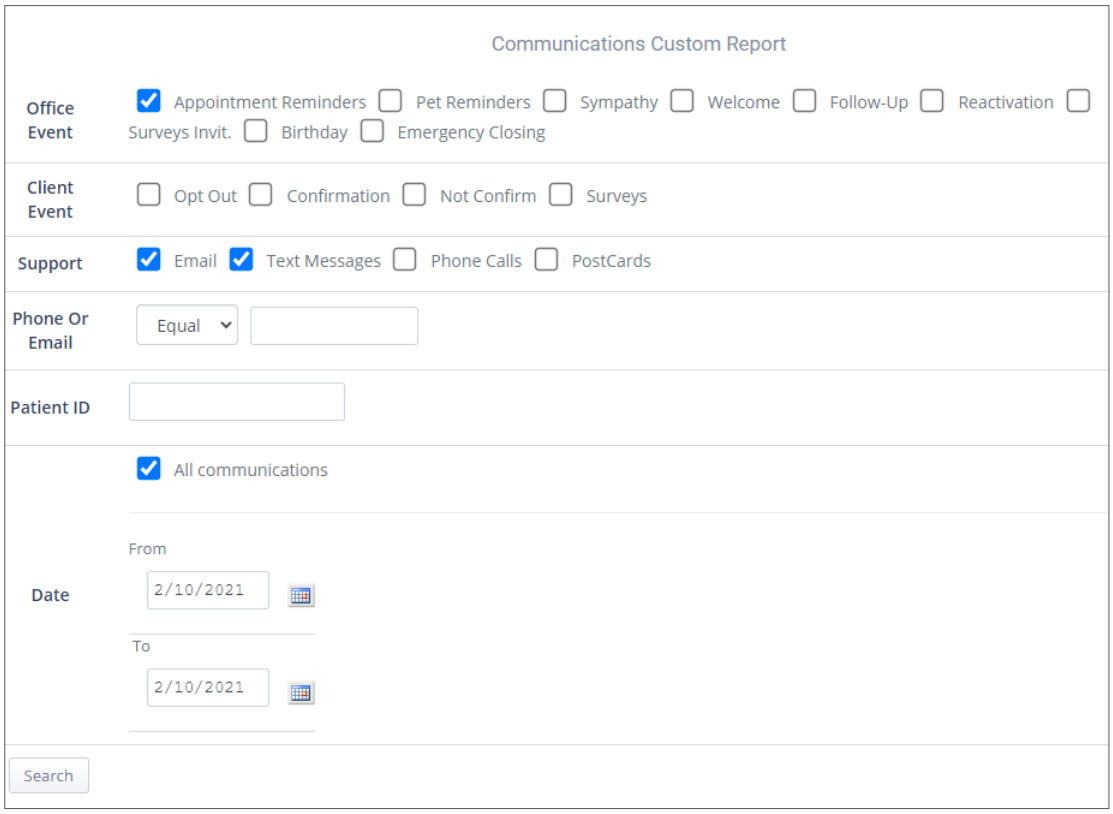
Outbox Custom Reports

Click on **Custom Report** to create a list of messages based upon the criteria selected under **Communications Custom Report**. Mark the **Office Event**(s) for the report, the **Client Event**, if necessary, **Support** options, **Phone or Email**, if needed, **Patient ID**, if looking for communications for a specific patient, and the **Date** range.

Click **Search** when all criteria have been selected for the custom report.



All Recents

This page displays the most recent communications to and from client.

Reports

Create a custom report following the same procedure as shown above under Outbox Custom Reports.

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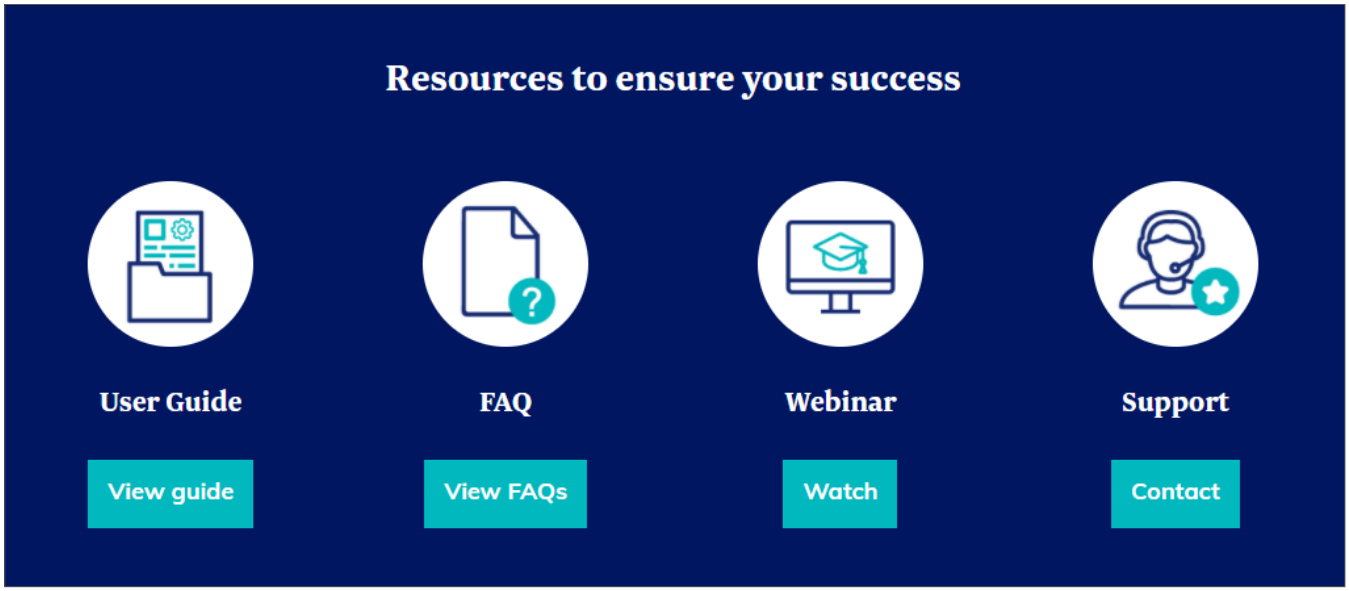
Integrated Telemedicine

After clicking on this tile, the web page redirects the user to the Covetrus website and introduces the user to Rapport's telemedicine feature. On this web page are links to a User's Guide, FAQ's, and a webinar that explains how to access and use the Telemedicine feature within Rapport.



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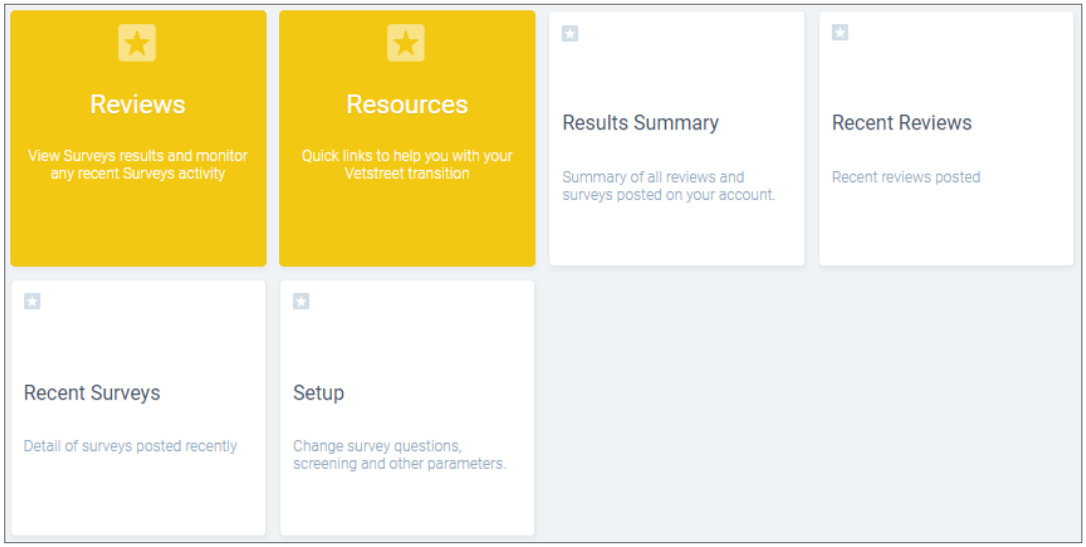
Resources

The Resources tile gives the user access to quick links to help with the Vetstreet transition.



Results Summary

This will show a summary of reviews and surveys posted on the practice's account.

Recent Reviews

Click on this tile to view recent reviews posted.

Recent Surveys

This link shows the detail of surveys posted to the practice's account recently.

Setup

From this tile, the user is able to change survey questions, screening, and other parameters.

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Survey Emails and Rapport Review Page

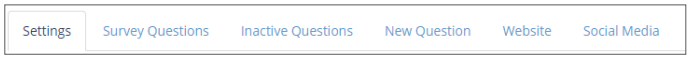
Overview

This feature allows survey invitation emails to be sent automatically following a client visit at the practice. All survey replies are automatically compiled and published to a URL reviews page that Rapport creates for the practice account.

There are different areas the user will need to access to setup and manage Rapport reviews.

Getting Started

The user will need to access the Client Reviews Setup page to review or change Rapport's default settings for the review/survey options. The setup options can be accessed by selecting **Reviews > Setup** from the Navigation Bar.



- **Settings Tab:** This form allows the user to define how soon the Survey Questions are sent out to clients after they visited the practice.
  - **Feedback Invitation:** Defines when the system emails the invitation to the client. The default setting here is to send the survey invitation two days after the client's appointment.
  - **Invitation Rule:** Establishes the frequency with which the survey invitation is sent to the clients. The default setting is set to **unless patient has already received an invitation within the last 6 months**.
  - **"From" Email Address for Surveys Invitation:** Determines the email sender for survey invitations. This email address is automatically created for the practice Rapport account by the Rapport system.
  - **Review Notification Email:** The email address to which the system sends any review notifications. When clients enter a review (adds a comment) in addition to completing the survey questions, the system automatically notifies the account so the comments submitted by the clients can be monitored.

    This email address defaults to the account's notification email address but can be changed. However, a second copy will still be delivered to the notification email address.

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- **Clients Reviews Website:** This links to the account's specific Rapport Reviews page. This page will be created by the system once the practice receives the first review back and is posted.
- **Exceptions:** Establishes specific inclusions/exclusions based on appointment types or visit reasons setup in the practice database. The keyword **EUTH** should always be excluded in the setup by default. This area must be edited by a member of the Rapport Support team. Please call **855-980-9099, option 4**, for assistance.

- **Survey Questions Tab:** Displays the current default list of questions set by the Rapport system for the client survey invitation. To compare these questions with other practices, each question has a specific **Object Evaluated**, (i.e., staff, vet) and a specific **Attribute** (i.e., efficiency, availability).
  - The order of the questions displayed here determines the order in which the client completing the survey sees the questions in the invitation.
  - To modify the wording of the question, click on the question, make the edits, and hit **Save**.
  - To inactivate a question, click on the X in the Action column. This removes the question and adds it to the Inactive Questions tab.
  - To change the order of the questions, click the up or down arrows in the Action column.
- **Inactive Questions Tab:** This menu displays all inactive questions.
  - The questions can be activated again by clicking the **Act.** option under the Action column.
  - Any question that has not been answered by a client can be deleted by selecting the **Del.** option under the Action column.
  - For questions that have a lock icon under the Action column, means that the questions have been answered by a client and cannot be removed.
- **New Question Tab:** Allows the user to create a new question for the survey.
  - **Question Text:** Enter the text for the question.
  - **Answer type:** Determines whether the questions are answered with a 1-5 start rating - **Multiple choices** or a **Yes / no** option.
  - **Count for rating:** If checked, the client's rating counts towards the account's overall rating. If the question type is set to **Multiple choices,** this should be **enabled**.

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- **Object Evaluated:** Defines what or who is evaluated.
- **Attribute Evaluated:** Defines what quality or attribute should be evaluated.

  The **Object and Attribute Evaluated** options are only used to compare the practice's review ratings with similar object and attribute ratings from other Rapport accounts.

  The practice can create as many questions as needed; however, our recommendation is to limit it to five or six questions for best results.

  When a new question is created, it becomes active and goes automatically to the end of its Survey Questions group: Multiple choices or Yes / no.

- **Websites Tab:** Reviews are a great tool to market the practice to new clients visiting the practice's website.

  Once survey questions have been submitted by clients, Rapport automatically generates a Rapport reviews/survey page for the practice.

  The following options allow for adding the Rapport reviews/survey page to the practice's website. Choose the best option for the practice. Once the best option is selected, a request can be made to the practice's website administrator to add this option to the practice website.

  - **Simple Link:** Provides HTML code for embedding a simple link on the practice's website.
  - **Gold Seal:** Provides Java Script code for a dynamic gold seal, which automatically updates, corresponding to the number of reviews submitted by clients.
  - **Direct Inclusion:** Provides source code for CSS and AJAX which allows the practice to embed client testimonials directly on the website. Custom CSS can also be uploaded and referenced when embedding testimonials.

- **Social Media Tab:** Use this area to customize how surveys can be shared across social media platforms.

  - **Google+:** Previously Rapport would push the reviews page directly to a practice's Google+® page. Google™ has disabled the Google+ functionality. In place of Google+, Rapport now uses the Google+ email invite to direct clients to the practice's Google Places page to submit a review there.

    The Google invite will automatically be sent out to any client that has given a 5-star review. The invitation will ask the client to submit a post on Google Places.

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- **Change email model invitation:** Allows the user to edit the content of the email message. To the right is the **preview** button. This allows the user to preview the email as the client would see it when it is received. The link for the Google Places™ URL must be added to the email content. To find this information, perform a Google search for your practice.

- **Settings:**
  - Send Invitations to write a Google Places review to all authors of 5-star reviews.
  - Send Invitations to write a Google Places review to all authors of 5-star surveys. This applied only if the Google+ URL is valid.

- **Google+ URL:** Add the URL for Google Places here. Locate the practice's Google Places account by performing a Google search.
- **Facebook:** If a client has submitted a positive review, the practice can send a follow-up email to the client inviting them to share the review on their Facebook page for all their friends to see. This option will not post the review to the clinic's Facebook page.
  - **Publication:** This option should always remain enabled to ensure the surveys page can be published to search engines.
  - **Facebook Invitations:** Determines the frequency in which the client receives the Facebook Sharing invitations.
    - ✓ **Never:** Disables the Facebook Sharing feature.
    - ✓ **Always:** Automatically delivers a Facebook Sharing email to clients. This is not recommended because the practice cannot monitor the reviews before going public with them.
    - ✓ **On Demand only:** This is the default and recommended invitation method. With this option the account user has control over who receives the Facebook sharing email and who does not.
    - ✓ **Manually send a Facebook invitation:** On the Navigation Bar, go to **Reviews > Recent Reviews >** click the client to invite. Select the **Invite to share on Facebook** option at the bottom of this window.
  - **Facebook App:** Determines which application loads to Facebook once the client selects the sharing link. For Rapport accounts this should always be set to LOVE MY VET.
  - **Client Facebook Wall Practice Picture:** The image that appears adjacent to the client view when published to Facebook.

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A custom picture can be uploaded to appear in this view. It is recommended to upload the practice's logo here. The size of the photo should be relatively small, less than 1 KB to ensure it loads properly.

- **Facebook URL:** Add the URL of the practice's Facebook page in this field.
- **Change email model invitation:** Allows the user to edit the content of the email message. To the right is the **preview** option. This allows the user to preview the email as the client would see it when it is received.

Managing Reviews

Manage what reviews/surveys post to the practice's Rapport Reviews page and see overall survey results for the practice.

- **Reviews:** Click on this menu option to view the overall survey results for the practice.
- **Sub-menu option on Navigation Bar:** Select these options to view a list of the most recently submitted reviews and surveys.
  - **Recent Reviews:** Occurs when a client responds to the survey questions and leaves a comment.
  - **Recent Surveys:** Occurs when a client only responds to the survey questions but does not leave any comments along with the survey.
    - **For both the sub-menu options:**

      Opens a page that lists all the reviews/surveys the practice has received. The page displays the date received, client name, and results percentage.

      The practice can flag any reviews within three days of submission to prevent reviews from being published to the accounts Rapport Reviews/Survey page.
    - **To flag a review**, click on the percentage given under the **Result | Review** column. When the new page displays, click the **Flag** link next to the red check mark by the accepted field to flag the review. This changes the red check mark to a red X, and the appropriate field changes to **Reverse**.
    - **The Results Summary** page displays a breakdown of the results for each question and how the client answered each question. At the bottom of the page is the option to send a Facebook invitation to the client.

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If a review/survey was published and you want to have it removed, call the Rapport Support team at **855-980-9099, option 4** to make the request to remove it for you.

- **Customizing the practice's office hours:** It is important to update the practice's office hours that will display on the Rapport Reviews/Surveys page.

  - **To Update office hours:**

    1. On the Navigation Bar, click **Setup**.
    2. Under **Online Scheduling**, click on **General**.
    3. Update the **Regular Open Days & Hours**.
    4. Click **Save** to submit the changes.

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