USER GUIDE

How AnimalDesk works

Short steps for every part of the app. Stuck? Ask the AI assistant inside the app, or email hello@animaldesk.tech.

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Getting started

Sign up, set up the clinic, invite the team. It takes about ten minutes.

1. Choose Create your clinic on the AnimalDesk website. Enter your clinic name, your name, your email and a password of 12 or more characters, and tick the box to accept the Terms of Service and Privacy notice. You get a 14-day free trial of your own clinic with every module switched on, and no card is needed. It starts empty, ready for your own animals.
2. The setup wizard then takes six short steps: your clinic (name, type, registration or tax number, species), address and contact (street address, country, currency, phone, WhatsApp, public email, website), how you get paid (bank account and PromptPay, optional), your team, Mài tā, and a final check. You can skip the banking step and change everything later in Settings.
3. In Settings → Team, add each person with a role and a temporary PIN or password. They are asked to choose their own the first time they sign in. Your plan sets how many staff and volunteers you can add.

4. Install the phone app: open Settings → Phone app (or the Phone app link on the website), then add AnimalDesk to your Home Screen (iPhone) or install it (Android). You sign in once and stay signed in.

Roles and what each can do

Everyone sees the screens that match their job, on the web and on their phone.

1. Admin and owner: everything, and the only role that can change another Admin. Every account has at least one.
2. Practice manager (GM): full access to everything the clinic does, including Settings, the team, payments, modules, Accounting, Reporting, Marketing and Volunteers. The one limit: only an Admin can add, reset or switch off another Admin.
3. Vet: consultations, SOAP notes (can sign), imaging and labs. Nurse: care plans, vitals, nursing notes and SOAP drafts for a vet to sign.
4. Volunteer coordinator: rota, tasks, notices and Marketing. Volunteer: the phone app, with a volunteer-safe view of each animal, their tasks and shifts, and field reports with GPS. Maintenance: the Shelter board and work orders.
5. Marketing: the Marketing module only: contacts, campaigns and the email library.
6. The server checks the role on every save. A volunteer's phone cannot change clinical records, and only staff can add patients.

Registering animals and the record

Every animal has one record that follows it from intake to release.

1. Search first, so you do not register an animal twice. Type in the Walk-in field on the dashboard, or press Register animal on Patients: matching animals appear, and you can open one instead. Registering a second animal with the same name is allowed; the form just warns you.
2. Register animal opens a form with everything you can record: species, breed, sex, age, weight, colour and markings, tattoo or microchip, where it came from and who brought it, vaccines, temperament and why it came in. Only the species, and one of a name, tag, chip or complaint, are needed. Whatever you leave blank is stored as Not recorded: nothing is filled in for you. For a species not on the buttons, type it in the box and it is added.
3. The record has Overview, History, Consultations, Surgeries, Care plan, Notes, Vitals, Imaging and labs, Documents, Responsible person, Preventive care and Costs. A tab that is greyed has nothing in it yet; click it to add the first entry. A green dot means it has entries.

4. Alerts (red) warn staff, for example muzzle needed. Add behaviour and tags with + Add behaviour or + Add tag, pick from the list or add a new one, and press × to remove. Documents, scans and photos can be added to each section and downloaded again.
5. Drag the History slider to see what the record said at any date. Mài tā's case summary reads only what is on the record.

Consultations and SOAP notes

Talk or type the exam. Mài tā writes it up. You review and sign.

1. Open Consultations for a table of every completed consultation, newest first. Search it, or filter by today, this week, this month or a custom range, by vet and by signed or draft. An animal's card opens its record.
2. Press Write a consultation, choose the animal, then Record and speak (it uses your browser's speech recognition, so allow the microphone; Chrome works best) or type the exam in the box.
3. Mài tā transcribes what you say and completes the SOAP and the care plan: Subjective, Objective, Assessment and Plan. She uses only your words and the vitals on the record, never invents findings, and leaves A and P empty if you did not say them. If she is switched off or busy, your own words are kept in S.
4. Review and edit every box, then Sign. A nurse's note is saved as a draft for a vet to sign. A signed note stays on the record; corrections are added beside it. Signed consultations appear in the animal's Consultations tab and are counted in Reporting.
5. In the demo clinic only, Play a demo consultation runs an example narration so you can see the whole flow.

Vitals, labs, surgeries and imaging

Readings build a chart over time, with the date and time each was taken.

1. Vitals tab → log weight, temperature, heart rate or respiratory rate. Leave a box empty if you did not measure it. Impossible values are refused. Hover a reading to see when it was taken.
2. Imaging and labs → add each lab result with its unit and reference range; high and low are flagged for you. Add an imaging study with the area, findings and the picture or PDF (up to 400 KB each).
3. Surgeries tab → add the procedure, the anaesthetic used, the outcome and notes. Sterilisations are counted in Reporting from here.

4. Preventive care → vaccines, deworming, flea and tick, microchip and sterilisation, each with a date and the next due date. Add, edit or archive an entry, or press Given today.

Medicines, stock and prices

Every dose is recorded: which animal, which drug, when, and who gave it.

1. Inventory lists medicines and supplies with their unit cost, reorder level and expiry. Click a heading (Item, On hand, Unit cost, Value, Expiry, Status) to sort, and click again to reverse. Open Reorder, Expiring or Donated to narrow the list.
2. Click any item to open its medicine log: every administration with the date and time, the quantity, the animal and its case ID, and the person who gave it. Export it as CSV for an audit.
3. Items marked given in a consultation or a care plan come off stock and go into the log. Controlled drugs are marked, and the movement ledger shows stock coming in and going out.
4. Prices: a green dot means the cost comes from a current Thai retail listing; a grey dot is an estimate to confirm with a supplier quote. Enter what you actually paid when you receive stock; the medicine log, Reporting and Accounting then use your figure. The note under the table explains the sources.

Shelter, calendar, rota and routine tasks

The practical side of looking after many animals and the people who help.

1. My day: the first screen on the phone for every role lists what you have to do today, in time order: care-plan items for your role, routine tasks given to you or open to your role, notes waiting for your signature and animals waiting to be seen. Tick things off as you go. Ticks and routine tasks start fresh every morning.
2. Routine tasks are the recurring jobs that sit outside care plans: deep cleans, kennel and litter cleaning, laundry, yard checks. Find them under Volunteers, Routine tasks. Give one to a person, or leave it open to a role so whoever is free can tick it. Choose daily, weekly, monthly or once.
3. Care plans are different: they are generated inside each patient's record, and their tasks appear in My day for the role they are set for.
4. Calendar (vets, nurses, practice managers and admins only): week and month views of every appointment, in a different colour for each kind: consultation, surgery, sterilisation, vaccination and follow-up. Use the All, Surgery and Consults switch to focus. Press + Add appointment (or the + on any day), choose the kind, the animal or a walk-in, who will see them and how long; only free times inside your hours are offered, and a person cannot be double-booked. Drag a card to

another day to reschedule it. Check in a booked animal on the day to put them in the clinic queue. Mark a surgery done and the procedure is added to the animal's record and the medicines and supplies for it are taken out of stock and logged. Add the owner's email to send a reminder (for example 24 hours before) if you have switched that email on.

5. Calendar settings: the Settings tab sets when the clinic is open each day, when surgery and sterilisations run, how long each kind of appointment takes and how often one can start. An admin or practice manager can change them.
6. Room rack: every room and kennel with who is in it. Assign an animal by searching, mark a room dirty, cleaning or out of order, and see recovery cages linked to surgery.
7. Rota: tap a shift to staff it. A shift with fewer than two volunteers is flagged. Volunteers can swap or ask for cover, and the coordinator approves.
8. Check in on the phone when you start a shift. It records the real time, and the hours worked are added when you check out.

Reporting and exports

Every figure is counted from the same records as the animals, so a number and its rows always agree.

1. Ask Mài tā about your numbers: the bar at the top answers plain questions such as medicines used last month or sterilisations by month, and opens the records behind the answer. Suggested questions are shown under it.
2. Tabs along the top: Overview, Sterilisations and vaccinations, Admissions and outcomes, Medicines and money, Records and export.
3. Choose a period: today, this week, this month, last month, 90 days, year to date, 12 months or custom dates.
4. Records and export: every table can be searched, sorted, exported to CSV or printed as a PDF. The donor update draft uses the same figures.

Accounting

Donations and fees in, medicines and salaries out, matched to the fund each gift was for.

1. Income: record donations, fees, sponsors and grants. Tick Donated goods or services when no cash moved (for example donated vaccines): it is valued but kept apart from cash.
2. Expenses: record what was bought, with the receipt. Staff can send claims; an admin or general manager approves, queries or rejects them and marks them paid.

3. Salaries: add each person's pay. Give an advance when someone is paid early; it comes off the next salary and is not counted as a cost until then.
4. Funds: give each entry a fund (Neutering, Vaccination, Emergency care and so on). The Overview shows what came in and went out for each fund, so restricted gifts are only spent on what they were for.
5. Invoicing: create an invoice from a consultation or surgery, add lines for the animal, change prices and units, preview a PDF with your branding and payment methods, then send and chase it. Donations have their own tab, with receipts.
6. Costing (Inventory → Costing & rates): the procedure cost estimator adds up medicines at the current lot cost plus vet and nurse time. Search a procedure, press Edit to change quantities, add or delete lines, set the minutes and ward days, then Save. + New procedure makes your own, and Order what is missing puts short items on a purchase order.
7. Profit and loss shows the period by category, with cash and in-kind separate. Download CSV gives your accountant everything. Everything works on a phone: log an expense by taking a photo of the receipt.

Outreach map

Where the team is on the island, and what they have done.

1. Outreach shows a map of the island with the people who have switched on Share my location while I am on shift. It is off by default, only works while you are on shift, and is cleared when you check out or sign out.
2. Tap a person to see their task list, vaccinations given and the work they have completed. Field consultations and SOS reports appear on the map with their pins.

Marketing and email

Contacts, campaigns and email templates, in your clinic's branding.

1. Contacts: owners, adopters, donors, volunteers and members. Adding someone whose email is already there tells you who they are instead of making a second copy. Tick several to email them, tag them, or switch their emails off. Unsubscribe links are added for you.
2. Campaigns: build an email with the editor, preview it, send a test, then send.
3. The email library has more than forty ready-made emails in sections: What happened, Donors, Volunteers, Clinic, Non-profit and fundraising (welcome series for new donors, appeals, sponsor and adopter journeys) and Private clinic (vaccine reminder funnels, wellness plans, dental and

parasite campaigns, review requests and win-backs). Each goes to the responsible person: the owner, adopter, sponsor or donor.

4. For each email you can switch it on or off, edit the words, and change when it is sent: pick the event and a wait before or after it, such as 24 hours before an appointment or 3 days after a new donor is added. Copy and edit makes your own version, Make a campaign turns it into a campaign for any audience, Archive puts it away (restore it any time) and Delete removes your own copies. + New email starts from a blank.
5. What starts them: adding a donor, client or adopter in Contacts starts their welcome journey; a booking with an owner email starts appointment emails; volunteers get their welcome when added. Emails you have not connected to an event are sent by hand as campaigns.
6. Connect your own mailbox in Settings → Mailbox so emails come from your clinic's address. Until you do, PACS-style clinics and the demos send from hello@animaldesk.tech with your clinic's name, logo and signature. Add bank, PromptPay or card details in Settings → Payments and donations; they appear in emails as links. AnimalDesk does not take payments for you.

The Mobile App and notifications

Sign in once. It opens the right screen for your job.

1. Install: open the AnimalDesk address on the phone and choose Add to Home Screen (iPhone) or Install app (Android). Sign in once; the app remembers you for 30 days.
2. Every kind of user has their own tabs. Vets: Today, Patients (who is waiting and notes to sign), Calendar, SOS, Me. Nurses: Today, Wards, Doses (the dose helper and nursing questions), Calendar, Me. Practice managers: Today, Team (who is on and where cover is missing), Figures, Stock, Me. Maintenance: Today, Issues, Report, Me. Volunteer coordinators: Today, Animals, Coordinate, Report, Me. Volunteers: Today, Animals, SOS, Report, Me.
3. Today is My day for everyone: your tasks for the day, your shift and check-in, notices and cleaning.
4. Phone alerts: allow notifications when asked. Walk-ins, emergencies and urgent tasks reach vets, nurses and managers; rota and volunteer news reaches volunteers. On an iPhone, add AnimalDesk to the Home Screen first.
5. Field work: vets and nurses have a Field tab and a + Field consultation button: find or register the animal, the place is tagged by GPS, add vitals, a SOAP note (dictate if you like), medicines, procedures, photos and follow-up tasks, and sign or leave it for a vet to sign. Everyone has + SOS for an emergency: it shows the vet on duty to call, takes a photo and your location, and alerts the clinic.

6. Offline: with no signal the app keeps working. New animals, notes, medicines, tasks, photos and pins are saved on the phone and sent when you are back in range; the chip at the top shows Live, Syncing, or Offline with how many changes are waiting. On an iPhone, open the app once you are back in signal so it can send.
7. Every page has a large Back button that returns to the page you came from.

Settings and modules

Switch on only what you use.

1. Settings opens on tiles: Team and access, Roles and permissions, View as, AI assistant, Vet on duty, Clinic profile, Modules, Payments and donations, Mailbox, and Plan and billing. Tap a tile; the tabs along the top take you between areas.
2. Team: add people with a name, a username and a role (Admin, Practice manager, Vet, Nurse, Maintenance, Volunteer coordinator, Volunteer, Marketing). Practice managers and Admins sign in with a password of 12 or more characters; others use a PIN. Only an Admin can add, reset or switch off another Admin.
3. The Practice manager (GM) has full access to everything the clinic does. The Admin is the account owner.
4. AI assistant: Mài tā is the default. Give her another name and one of ten pet faces (cats, dogs, a parrot and a rabbit), switch her off for any role, such as nurses or volunteers, or for the whole clinic. Admins and practice managers always keep her. When she is off for someone, nothing they type is sent to the AI.
5. Modules: switch parts of the app off for everyone. Records stay safe and come back when you switch a module on again.
6. Payments and donations: add your bank, PromptPay, card and PayPal details once. They appear on invoices and donation emails.
7. Clinic profile: name, address, registration number and contact details, shown on invoices and receipts.

Emergency first-aid guide

Step-by-step help for the first minutes before a vet takes over.

1. Open Emergency from the menu or the red link on the phone. Call the vet on duty first, then choose what is happening and follow the steps.

2. At the end, press Send incident log. It is saved to the Incident log on the Emergency screen, with who, when and the steps followed, and vets and nurses are told.
3. The Incident log lists every incident so you can look back at what was done.

Mài tā: chat, nurse, doses and settings

Your helper cat. She drafts, explains and answers from your own records and the knowledge library.

1. Mài tā floats in the corner: drag her anywhere. Tap her to open four tabs, each with a line saying what it is for.
2. Chat: ask how AnimalDesk works, or a general clinic or shelter question.
3. Nurse: ask any nursing or medical question. She answers from your own knowledge library, names the source, and says what only the vet decides. The library has more than 1,500 protocols, guides and drug entries, each with its source, and entries are marked for review until a vet at your clinic approves them.
4. Doses: she works a dose and the volume to draw up step by step from the animal's weight. A vet must confirm every dose. She never quotes a dose from memory.
5. Settings: choose how long her answers are, what she sticks to, and add your own protocols. Her name and face are set under Settings, AI assistant.
6. Train Mài tā: open Train Mài tā in the menu to read the knowledge library, add your own protocols and approve entries. A vet approves clinical entries before she presents them as approved.
7. She is a helper, not a vet. In an emergency, call the vet on duty first.

Your data, limits and safety

What is kept, what is limited, and what to do about it.

1. Each clinic's records are separate. Staff see their clinic only. Every save is checked against the person's role.
2. Files (receipts, scans, photos, documents) must be under 400 KB each. A clinic's records have a total size limit; if you reach it, the bottom of the screen says Storage is full, and recent changes stay on the device until space is freed.
3. Exports: Reporting, Accounting and Marketing export to CSV, and reports print to PDF. A single download of every record in the clinic is not built yet; ask us if you need one.

4. Mài tā is a helper. She drafts notes, summaries and plans from what is on the record and from the shared library. She never replaces a vet's judgement. In an emergency, call the vet on duty first.
5. Signing out removes the clinic's records from the device. If you have changes that have not been sent, sign in again once you have a signal and let them send before you sign out.

Plans, trial and the demo

What it costs and how to try it.

1. Starter $100, Clinic $199, Hospital $349 and Network from $599 a month. Registered non-profits get 50% off; paying yearly is 12 months for the price of 10. Marketing and Accounting start at the Clinic plan. Starter allows 3 staff and 10 volunteers, Clinic 10 staff, Hospital and Network no limit. The limits are enforced when you add people.
2. New accounts get a 14-day free trial of their own clinic with every module. Plan changes and invoices are handled by email for now.
3. The live demo: enter your name and email on the website and we email you a one-tap link, no password. Opening it gives you a private clinic, Thailand Animal Care, with sample animals and books for 24 hours. Nothing you type there is real or kept. After the 24 hours, the next step is a free trial of your own clinic.

Problems and help

If something does not work, this is usually why.

1. A button does nothing, or a page says you are signed out: sign in again. Sessions end after 30 idle days or a password change.
2. No emails are sending: check Settings → Mailbox and send a test. Receipts, labs and photos must be under 400 KB.
3. On a phone with no signal, keep working: your changes are saved on the phone and sent when it is back online.
4. A report number looks wrong: open Records behind these numbers for the same period and look at the rows. The figure and the rows come from the same records.
5. Anything else: email hello@animaldesk.tech.

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