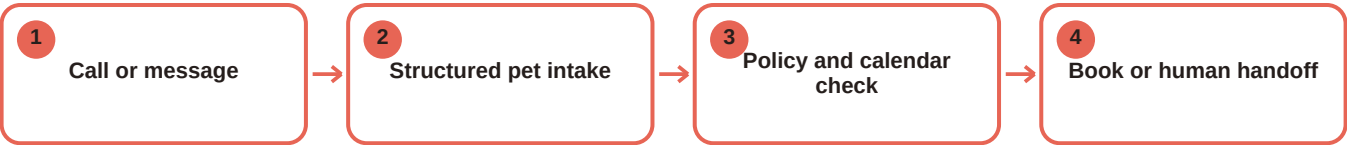


# Pet Business AI Receptionist Setup Worksheet

Define the booking rules, pet intake, safety boundaries, and human handoffs before an AI assistant takes live calls.



## Define your operating rules

|                                        |                                     |
|----------------------------------------|-------------------------------------|
| Calendar source of truth               | <div></div> <div></div> <div></div> |
| Business hours and blackout dates      | <div></div> <div></div> <div></div> |
| Primary human handoff role             | <div></div> <div></div> <div></div> |
| Safety or medical review owner         | <div></div> <div></div> <div></div> |
| Cancellation and rescheduling rules    | <div></div> <div></div> <div></div> |
| Required vaccination or policy records | <div></div> <div></div> <div></div> |

## Decision notes

# Readiness checklist

Attach a written rule, owner, or test result to every checked line. A blank answer is a reason to keep that path out of the first launch.

☐ List every bookable service and the staff or resource required to deliver it.

☐ Record service durations, cleanup or travel buffers, capacity limits, and combinations that cannot overlap.

☐ Choose the calendar that is the source of truth for availability.

☐ Document business hours, blackout dates, booking lead times, arrival windows, and cancellation rules.

☐ Define the owner and pet information required before a booking can be accepted.

☐ List vaccination, record, deposit, and policy requirements that must be satisfied.

☐ Identify medical, behavioral, medication, bite-history, and accommodation questions that always go to a person.

☐ Write the human handoff path for uncertain requests, complaints, emergencies, and callers who ask for staff.

☐ Approve the opening AI disclosure and the language used when a request cannot be completed.

☐ Test normal booking, no availability, rescheduling, cancellation, multi-pet intake, missing records, and a safety flag.

## Test scenarios

|                                                                                      |                                                                                        |                                                                                            |
|--------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| <div><input type="checkbox"/> New client</div> <div>Result / owner: _____</div>      | <div><input type="checkbox"/> Multi-pet booking</div> <div>Result / owner: _____</div> | <div><input type="checkbox"/> No availability</div> <div>Result / owner: _____</div>       |
| <div><input type="checkbox"/> Missing records</div> <div>Result / owner: _____</div> | <div><input type="checkbox"/> Safety flag</div> <div>Result / owner: _____</div>       | <div><input type="checkbox"/> Caller asks for staff</div> <div>Result / owner: _____</div> |

Ready to scope the workflow? Book a meeting at <https://petscheduler.ai/contact>. We will review the operating rules first, then discuss scope and pricing.