VetlinkPro Quickstart Guide

Version 6.1

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Clients

Search for Existing Clients

1. Begin your client search from either;
    a. Client lookup.
    b. Bill
    c. Appointment

2. This will open the client search window.

3. Enter part / all of the client's first name, last name or client number. Alternatively click **the F8: Advanced** button for more search options.

4. Click **F12: Search** to search. This will return results for all the matching clients.

5. Double click on the client you require.

Adding New Client from Client Button

1. Click on the **client** button.
2. This will open the client search window.

3. Click on the **F7: NEW** button.
4. This will open the client profile window.

5. Select a profile and click **F12: Accept**. (Profiles pre-set options in the client record).
6. Enter the client details. (Setup options can be customised to specify which fields are mandatory.)
7. Click the **tick** box in bottom right hand corner to save.

Adding New Client from the Diary

1. From the diary, make an appointment. (For an explanation of how to make appointments see the Booking an Appointment section.)

2. This will open the client search window.

3. Click on the **F7: NEW** button.

4. This will open the client profile window.

5. Select a profile and click **F12: Accept**. (Profiles pre-set options in the client record).

6. A client entry form will open. Setup options can be changed to open either minimal or full client entry forms.

7. Enter the client details. (Setup options can be customised to specify which fields are mandatory.)

8. Click **F12 finished** (minimal client entry) or the **tick** box in bottom right hand corner (full client entry) to continue.

9. Continue creating an appointment by selecting an animal and entering appointment details.

Animal

Adding New Animal from Animal Button

1. Click on the **Animal** button.
2. This will open the animal search window.

3. Click the **F7: New** button.
4. This will open the client search window.

5. Search for existing client or click on the **F7: NEW** button.
6. Enter animal details.
7. Click **tick** in bottom right hand corner to save.

Adding New Animal from Client Record

1. Search for and open the client record.
2. **Right click** on the animal grid and select **Add New Animal**.
3. This will open the animal search window.
4. Enter animal details.
5. Click **tick** in bottom right hand corner to save.

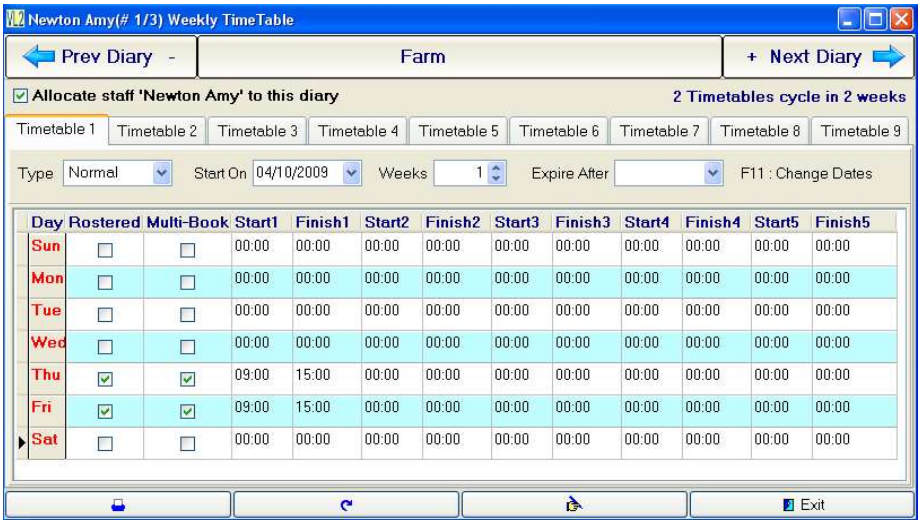
Staff

How to Enter New Staff Members

1. Create a client record for the new staff member.
2. Click on the **'Staff'** button
3. The staff search form will now be displayed. Click on the **'New'** button.
4. Click on **'OK'** to insert a new staff record.
5. A client search form will now be displayed. Search for the client you wish to enter as a staff member.
6. A new staff record will now be created. The staff record will be automatically populated with details from the selected client.
7. Enter the staff ID.
8. Save the Staff record by clicking on the tick in the bottom right hand corner.
9. If you have not set the password a prompt will appear telling you that their password is 'password'.
10. Click **'OK'.**

How to Set / Edit Staff Rosters

1. Click on the **'Staff'** icon and search for the staff member you wish to edit the roster for.
2. Click on the **'8: Staff'** tab.
3. Enter a **'Started'** date if this has not already been done.
4. Click on the **'F11: Roster (Click for details)'** button.
5. The weekly timetable will open.



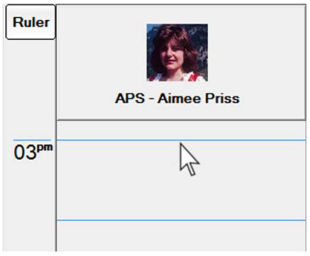
Day	Rostered	Multi-Book	Start1	Finish1	Start2	Finish2	Start3	Finish3	Start4	Finish4	Start5	Finish5
Sun	☐	☐	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Mon	☐	☐	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Tue	☐	☐	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Wed	☐	☐	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Thu	☑	☑	09:00	15:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Fri	☑	☑	09:00	15:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Sat	☐	☐	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

6. Select the diary you want to create a roster for using the **'Prev Diary'** and **'Next Diary'** buttons.
7. Tick the **'Allocate staff 'XXXX' to this diary'** check box.
8. Click on the **'Timetable 1'** tab.
9. Enter a start on date and select the days and times the staff member will be working.
10. Repeat for timetable 2 if a revolving roster is required

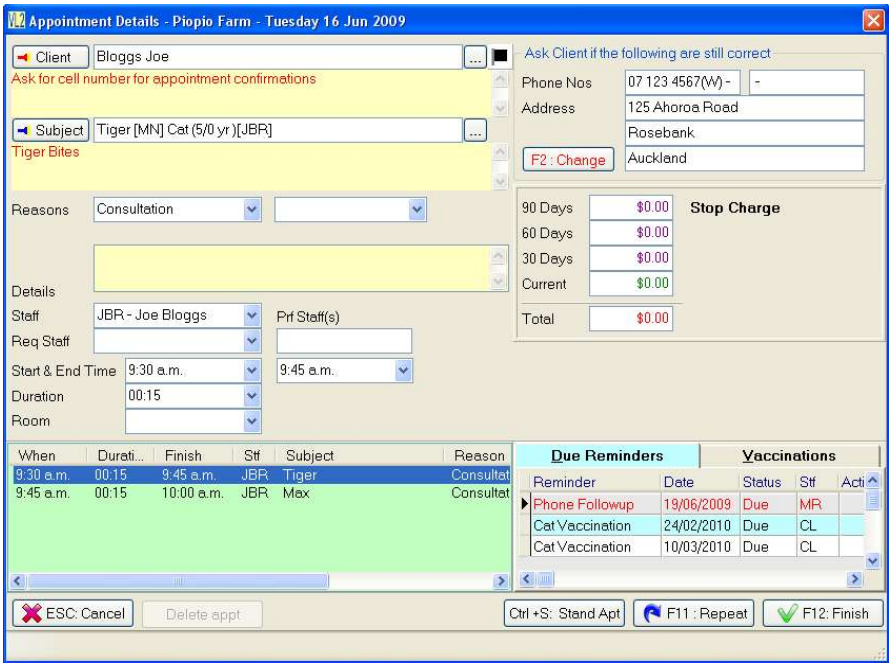
Diary

Booking an Appointment

1. Double click in the diary where you want the appointment.



2. Search for and select an Existing client or add new client.
3. Search for an Existing animal or add new animal.
4. This will open the appointment details window.



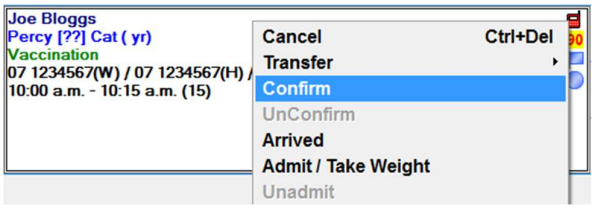
5. Enter the appointment details as required.
6. To create a second / Linked appointment for a second animal click the **Repeat** button.
7. Click **F12 Finish** to save.

Appointment States

Due: Appointment has been booked in.
Confirmed: Client has been contacted and they have confirmed the appointment.
Replied: Appointment confirmation has been sent by SMS and client has not replied yes.
Arrived / Admit: Animal has arrived at clinic and waiting for consult to begin.
In-Progress: Consult has begun with Vet.
Ready: Vet has completed consult and payment is ready to be taken by reception.
Finished: Consult has been completed / discharged or transferred to another diary.

Confirming Appointments Manually

If your clinics appointment confirmations are done by phone, when the client has confirmed the appointment right click on the appointment and select **'Confirm'**.



Appointment Confirmations by Email / SMS

Appointment confirmations by SMS / Email can be setup by;

1. Contacting CFL to enable module and register SMS account.

2. Setting up a default message from **Options | Setup | Log in with username and password | Diary edit SMS or Email Appointment Notification**.

3. Setting up a default reply message from **Options | Setup | Log in with username and password | Misc | Internet | edit SMS Reply**.

Appointment confirmations by SMS / Email can be sent by;

1. Selecting the day on the diary you wish to send confirmations for then going to **Actions** menu and **Send Appointment Confirmations**.

2. All clients will be listed and will show the type of confirmation they will receive.

3. To send click the **Email / SMS tab** the click the **Email / SMS button** respectively to send.
    a. To receive an SMS Appointment confirmation message they must have a mobile number and have Appointment Confirmation ticked under By SMS in the More tab of the client record.

b. To receive an Email Appointment confirmation message they must have a mobile number and have Appointment Confirmation ticked under By SMS in the More tab of the client record.

4. When a client is sent an appointment confirmation by SMS, and a reply is received VetlinkPro will automatically mark the appointment as confirmed (Purple).

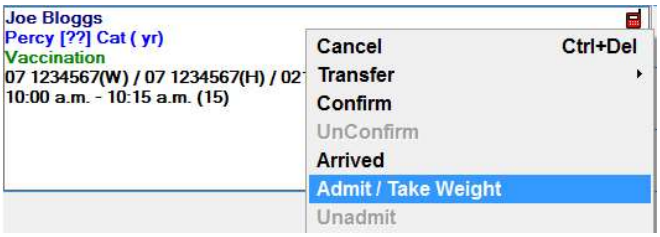
5. SMS Replies that are not Yes will turn the appointment Orange. The reply can be checked by right clicking on the appointment and choosing **Email / SMS** then **Look at Reply**.

6. Email replies do not come back into VetlinkPro.

Arrive/Admit Appointments

When the client arrives at the clinic, right click on their appointment and click '**Arrive**'. This will change the appointment colour to Yellow to show the client has arrived.

Alternatively click **Admit / Take Weight**. This will show a dialogue box to enter the patients weight, once the weight is entered this will change the appointment colour to yellow show the client has arrived, and also show a **W** icon to indicate the weight has been taken.



Cancelling Appointments

Right click on appointment | Cancel

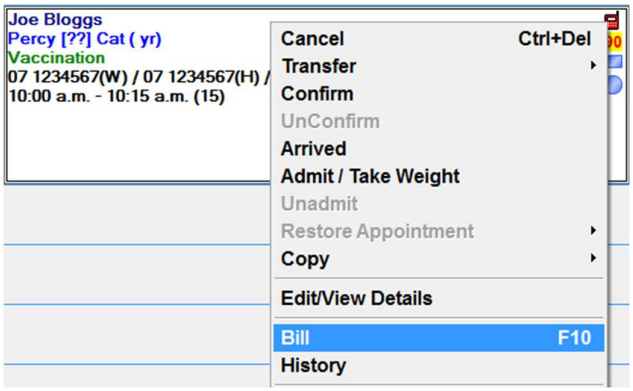
Diary Icons

	New Client - Shows when a client is new.
	Current Balance - Displays when the client has a balance outstanding in the current month.
	30 Day Balance - Displays when the client has a balance in the previous month.
	60 Day Balance - Displays when the client has a 60 day balance.
	90 Day Balance - Displays when the client has a 90 day balance.
	Bad Debtor - Displays when the client has **'Stop Charge'** set on their client record.
	Very Bad Debtor - Displays when the client has **'Stop Charge'** and **'Stop Statements'** set on their client record. This is usually when a bad debt has been written off.
	Not Seeing Requested - Displays when the client requested a staff member and did not get that staff member for the appointment.
	See Requested - Displays when the client got the staff member they requested.
	User Defined Flag – Displays a coloured flag identifying the custom group this client has been assigned to
	No Show – Displays when a client has a no-show (due) appointment on a previous date
	Sales Group – User defined sales group to identify a client profit/sales.
	Weight – Show when the animal has been weighed.
	Linked Appointment – Displays when an appointment is linked to another. The red triangle is the head while the blue is the tail. Click to enlarge and identify the chain.
	Text Message Reply – Signifies a text message has been received and not yet resolved.
	Room Selected – Displays when the appointment is also allocated to a room
	Appointment Transferred – Signifies that appointment has been transferred to another diary. E.g. Hospital or Surgery.

Billing

New Bill from Diary

1. Open the Diary
2. Right click on appointment and select **Bill**.



3. Begin entering items on the bill.

New Bill for client from Bill Menu

1. Click on the **Bill** Button.
2. Click the **F4: New Bill** button.
3. This will open the client search window.
4. Search for an existing client or create a new one.
5. Select an existing animal / create a new animal / select no animal.
6. Select a staff for billing.

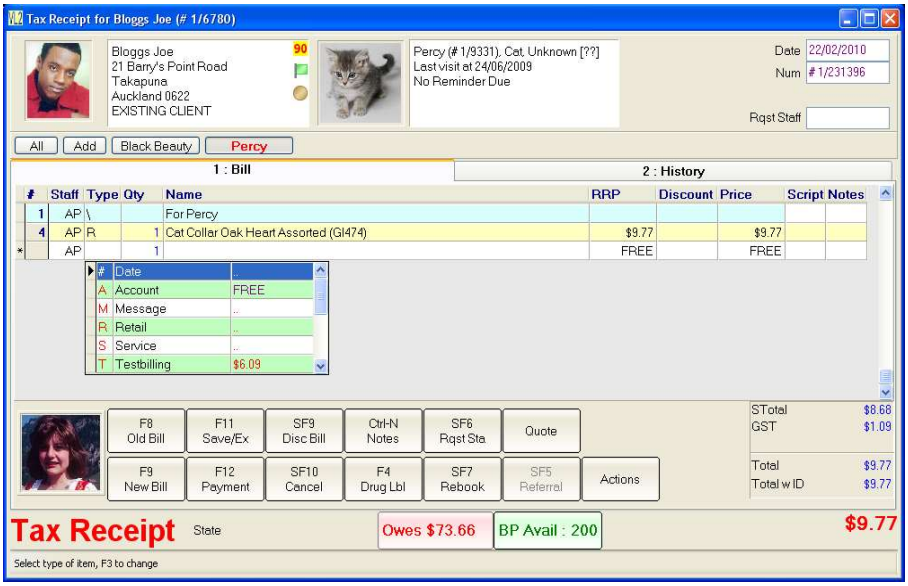
7. Begin entering items on the bill.

New Bill for Casual Client

1. Click on the **Bill** Button.
2. Click the **F5: Cash** button.
3. Select a staff for billing.
4. Begin entering items on the bill.

Adding Items to a Bill

1. With a bill open, ensure the Till Categories window is showing. If it isn't, press the down arrow on the keyboard until it is.
2. If you have a barcode scanner scan the item. (The barcode must have previously been attached to the item.)
3. To add an item press **R** or **S** on the keyboard to open the product search screen.
   a. Pressing R will allowing searching for all Retail, Material and Drug classed items.
   b. Pressing S will allow searching for all Service, Fee and voucher classed items.



4. Edit items price, quantity, descriptions, discounts etc…
5. Other functionality adding / editing items;
   a. To add a message to a bill press **M** on the keyboard.
   b. To delete an item off a bill **right click** on item and select **Delete Item**.
6. Repeat for other items.

Payment / Finishing a Bill

1. Finish entering items on the bill.
2. Press **F12: PAYMENT** to finish the bill.
3. The payments screen will open.
4. Select the payment method and amount required.
5. Press the down arrow on the keyboard to add another payment.

6. Press **F12: Finish** to complete the bill.
7. Choose whether to print or email bill.

Refund Bill

1. Click on the **Bill** Button.
2. Click the **F9: Special Func** button.
3. This will open the special functions window.
4. Click the **F5: Refund** button then **F3: Client Refund**
5. Select Client.
6. Select Refund Type.
7. Select a staff for billing.
8. Enter items to refund
9. Select **F12: Payment.**
10. Select Payment method of how the balance was returned to the client. To Credit the account select Charge.

Edit Bill

If a mistake has been made on a finished bill it must be refunded and entered again to fix. To speed this process up you can use the edit bill function which will refund the bill then clone it and leave it as an unfinished bill for users to correct.

To use the edit bill function;

1. Open a finished bill either by;
   - Opening a client record then going to history tab and double clicking bill to open.
   - Clicking **Acc Hist** button then entering bill number or searching by a date range.
2. Click **Actions** button.
3. Select **Edit Bill**.
4. A full refund / reversal will be done for you behind the scenes.
5. A clone of the bill and History will done and left open for you to fix the mistake.
6. Fix mistake and select payment methods.

Taking Account Payments and Deposits

Processing an account payment or making a deposit are the same thing, both just credit the clients' account. Account Payment can be made by a number of methods. The main methods are;

Account Payment from Bill

1. Begin a new bill for a client.
2. Press **A** then **P** on the Keyboard.
3. This will open the account payment window.
4. In the **Amount to be credited** field enter the payment amount received.
5. Choose which invoice/s to allocate payment to.
6. Click **F12 Accept**.
7. Click **F12: Payment** then select payment method to Finish.

Account Payment from Client Record

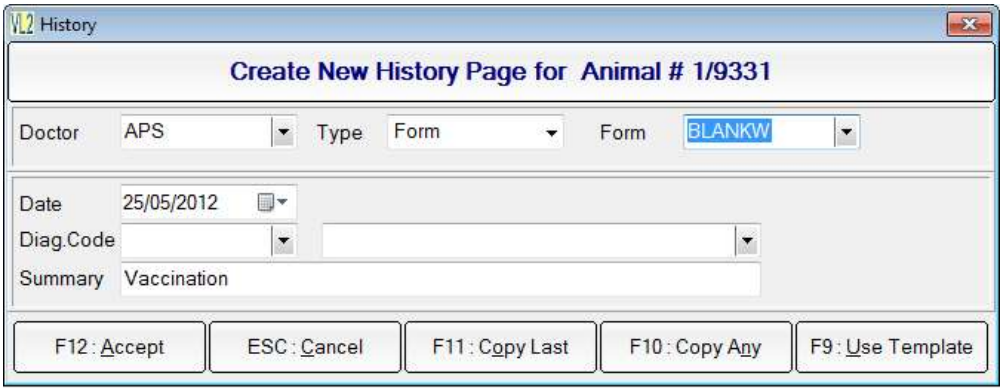
1. Open a client record.
2. Click **Actions** menu then **Make Payment.**
3. This will open the account payment window.
4. In the **Amount to be credited** field enter the payment amount received.
5. Choose which invoice/s to allocate payment to.
6. Click **F12 Accept.**
7. Click **F12: Payment** then select payment method to Finish.

Clinical History

Adding Written Clinical History

1. From an Bill click the **History tab**.

2. This will open the confirm history form page. This page can be skipped by setting your favourite default history form to open in setup.

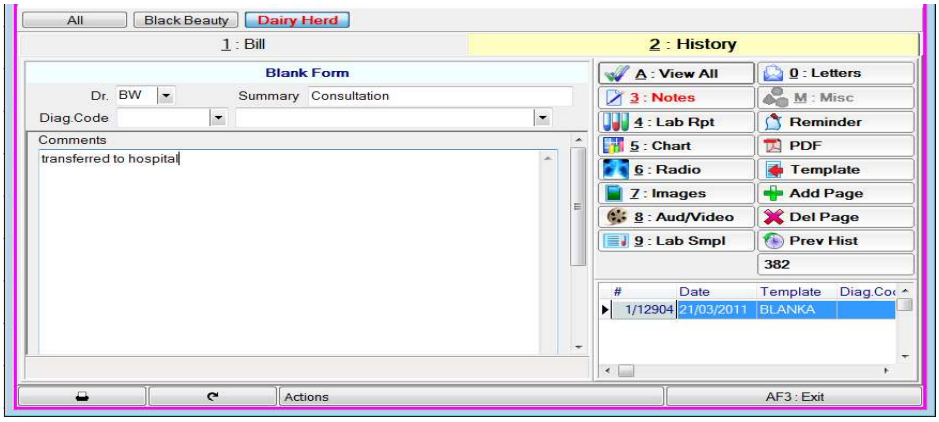


3. Select **Form** as the type of page to add.

4. Select a Form to add. Eg. **BLANKW, ALTNORMB, ALTSOAPA, etc…**

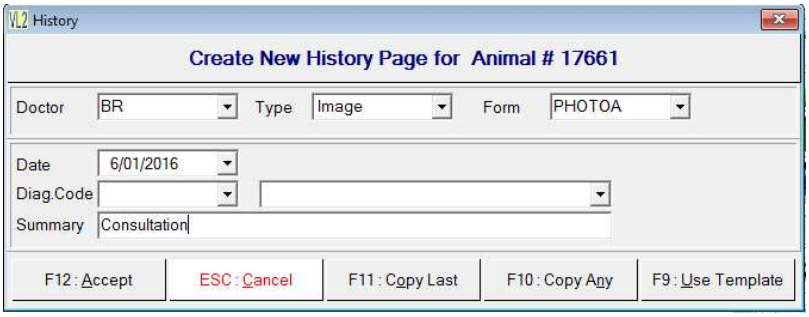
5. Check Doctor, date and Summary are correct and click **Accept**.

6. Enter written notes as needed;
   a. Pressing **Alt-D** on Keyboard will enter the current date and time.
   b. History abbreviations can be to enter a word, sentence or paragraph quickly from **Options | Picklist Setup | History | Abbr..**

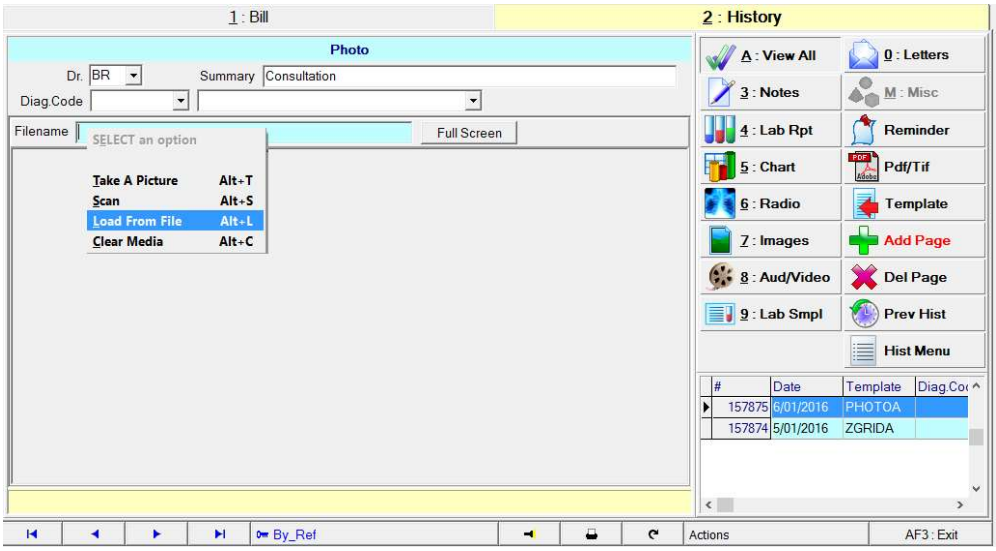


Adding Images / PDF into Clinical History

1. From an Bill click the **History Tab**.
2. Click the **Add Page** button.



3. Select Image / Radiology / Dicom / PDF as the type of page to add.
4. Select the PhotoA / Dicom / HSTPDF as the Form to add.
5. Check Doctor, date and Summary are correct and click **Accept**.
6. A blank page will open.
7. Right click on the blue box at the top of the page and select **Load from File**.
8. Navigate to the location of the image to copy it into VetlinkPro.



Adding Images / PDF via VL2ATTACH folder

1. Items placed in **VL2ATTACH** folder will be automatically imported into VetlinkPro based on the filename.

2. Files should begin with **H** then the **animal number**. E.g. **H1234.jpg**

3. Files will then be attached to the clinical history of the last open bill for that animal. If no open bill exists a new bill will be created.

4. All files will imported files for the clinical history will show in the lab reports section to be endorsed or moved.

5. Files can also import into the client document manager by naming the file with C then the client number, or import into the animal document manager by naming the file A and then the animal number.

Viewing Previous Clinical History

Previous clinical history can be viewed via a number of methods;

View Clinical History from Appointment
Right click Appointment | View Animal History | select either **History Browser** or **History Slide Show.**

View Clinical History from Animal Record
Animal Record | Select **Actions** button **|** select either **History Browser** or **History Slide Show.**

View Clinical History from Bill
Go to **History tab** of a Bill **|** Select **Prev Hist** button **|** select either **History Browser** or **History Slide Show.**

Clinical History Configuration and Setup

Default History Form
You can set your favourite default history form from **Options | Setup | Animal | History | Default form**

Create Blank history for all Bills
If you wish all bills to appear in the clinical history browsers even when no history was recorded you will then to enable Create blank history from Options **| Setup | Animal | History | Create Blank History …**

History Abbreviations
Quick entry abbreviation for entering history quickly can be set up from **Options | Picklist Setup | History | History Abbr**

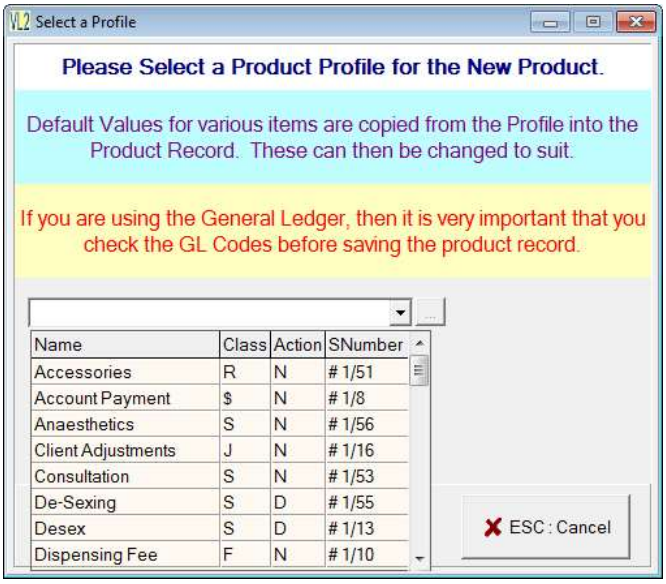
History Templates
Full history templates can be set up from **Options | Picklist Setup | History | History Templates**

Letters templates
You clinical history letter templates from **Options | Picklist Setup | Animal | Letter Templates**.

Products

Adding Goods and Services

1. Click on the **Product** button.
2. This will open the product search window.
3. Click the **F7: New** button.
4. This will open the **Product Profile** window.



5. Select the product profile required and click **Accept**.
6. Enter the product details as required.
7. Click the **tick** in the bottom right hand corner to save.

Product Fields / Setup

Product Class

Each product must be assigned to a class which defines properties in VetlinkPro.

- Retail
- Service
- Material
- Drug
- Fee
- Expenses
- Vouchers

Product Categories
Add categories in picklists first and then add to product record. **Options | Picklist Setup | Product | Category 1 / 2**.

Product Actions
Desex, Euthanise, Travel, and Microchip items can be set to perform additional actions at billing. Euthanise items can prompt the user to mark animal as deceased, Desex items can prompt user to mark animal as desexed, microchip items can prompt user to enter/scan microchip number or travel items can calculate mileage. Set actions from appropriate product record under Actions dropdown menu.

Reminder Types
Reminder Types can be added in picklists from **Options | Picklist Setup | Misc | Reminder Types**

Drug Scripts
Drug scripts / Labels can be added from **Options | Picklist Setup | Product | Drug Labels**

Handouts/Certificates from Product Record
Certificates are created / added from the product record under Handouts (printed when bill completed) or Certificates (printed when item added to bill).

Record Batch and Expiry
To prompt at billing to record batch and expiry and drugs go to **Product Record | More tab | Use Expiry | Yes**. Items with reminders do not need this setting as record batch and expiry is available on reminder window.

Variable Pricing
For items sold at a different structure based on things such as weight can be set up with variable pricing. This prompts the user with pricing options at billing. Only one SOH record is kept for all variable pricing levels associated with that products. Reporting cannot be done on individual pricing levels either. To use variable pricing go to **Product Record | Discount tab | Variable pricing**.

Manufacturer Barcodes
Manufacturer barcodes can be added from **Product Record | Actions | Barcodes** and scan the manufacturer barcode

ToMobile
If you are using the VetlinkPro Mobile billing app and wish this item to be uploaded ToMobile must be set under Product **Record | More Tab | ToMobile**.

Buy Size
Do you buy goods in a pack but sell by a single unit inside the pack? If so you might want to use buy size on the product record. Eg. If you purchase 1 bottle of 100 tablets, but sell per tablet your buy size would be 100.

Preferred Suppliers
Suppliers / Wholesalers must be added from **Creditors | Suppliers | New | ….** The preferred supplier for an item can then be added from the **Product Record | Preferred supplier**.

Supplier Codes
Supplier codes can be entered on the product from **Product | Actions | Supplier codes**. (Can also be added when making creditor invoice)

Min/Max
Are you intending to use automatic ordering? If so add min and max's to product record under the stock tab.

Product Rounding
Rounding can be done on each item or when payment is taken at billing. To automatically round prices on items open the **Product Record |** go the **More tab |** enter cents to round to in **Round Sell Prices To** field. You can choose whether round up / down or off from **Options | Setup | Product | 1: Options tab | Sell Prices**.

Payment Rounding
Rounding on payment can be set under **Options | Setup | Finance | Charges | …**

Complex Products
Complex product can be set up for speed of entry, standardisation of procedures and speed of entry.

- **Kitset**: Group of products (eg gift basket). Changing quantity of item on bill changes total price.
- **Surgery**: Group of products (eg Desex). Changing quantity of item on bill change does not change total price.
- **Drug**: Ethical drug with one attached fee.
- **Vaccination**: Service with up to six attached vaccines. Reminder can be set on vaccine.
- **Macro**: Like bill template. Just adds items to the bill.

Discounting Schemes
Discounts at Billing
Discounts can be applied manually at billing per item in the discount column or on the entire bill via the **SF9 Disc Bill** button.

Automatic / Incentive Client Discount
Clients can be assigned to groups which get automatic discounts or incentive discounts (paying account on time). Groups must first be setup under **Options | Setup | Product | Discount | Discount Names**. Each item must be assigned the appropriate discount in the **Product Record | Discount tab**. Discounts can be applied to groups of products in bulk from **Products record | Actions | Search and Replace** … Clients are allocated to discount group from **Client Record | Financial Tab | Discount on …**

Quantity Discounts
Clients can be given discounts by quantity in **Product Record | Discount tab | Quantity Discounts**.

Discount Schemes
Discount schemes that clients / animals subscribe to and expire can be set up from **Options | Picklist Setup | Financial | Loyalty Schemes | Client / Animal discount**. Client / animal registration is from the **Client / Animal record | Actions | Loyalty scheme Registration…**

Purchase Rewards

E.g. Buy 10 get 1 free. This schemes can be set up under **Options | Picklist Setup | Financial | Loyalty Schemes | Purchase Rewards**.

Loyalty Points

Add your loyalty points categories under **Options | Setup | Product | Discounts | Discount names**. Points are item based so must be assigned to relevant items in **the Product record | Discount tab | points column**. To assign points to products in bulk a search and replace (SnR) function is available. Contact the helpdesk for more information on SNR. Client must then be assigned to loyal points level in the **Client Record | Financial tab | Discount on Service / Retail / Material / Drug.**

Entering stock on hand (Stock Adjustment)

Stock on hand can be entered via an inwards goods invoice, stocktake or stock adjustment. Entering via stock adjustment is as follows; Open **Product Record** | click **Stock** tab | click **Stock Adjust** button | enter current stock on hand in **count** field. Check the red writing at the top of the window to check whether you need to enter in packs or units. The entry method can be changed in setup if required.

Changing Entry Method (Packs or Units) for Stock Adjust or Stock Take.

Go to **Options | Setup | Product | Stock tab | tick / untick Stock take in Units or Stock Adjust in Units.**

Vaccination Reminders

Creating Reminder Types

Reminder types can be added from **Options | Picklists | Misc | Reminder Types.**

Adding Reminder Types to Goods and Services

1. Open the product record you wish to add a reminder to.

2. Either;
    a. Select the Reminder drop down list on the general tab.
    b. If it is a Vaccination Complex product add the reminder under the Complex tab next to the drug/vaccine components.

Adding Reminders to Animals

Adding Reminders from Animal Record

Open the **Animal record | Right click on Due Reminder grid | Add New Reminder | Select reminder and dates to add.**

Marking Reminders as Done from Animal Record

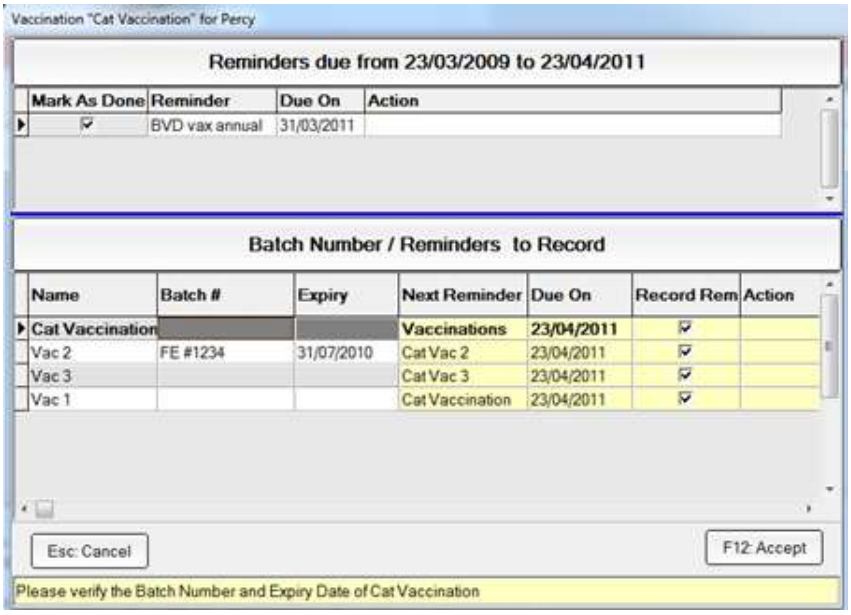
Open the **Animal record | Click actions button and then Reminders | select Reminder | Mark as Done.**

Marking Reminders as Done and Adding New Reminders at Billing

To ensure you don't send reminder mailers for vaccinations that have been done reminders can be marked as done while billing. New Reminders can also be added at the same time.

1. Add an item with Reminder attached into a bill.

2. This will open the reminder window
    a. The top section will show current due reminders that can be marked a done.
    b. The bottom left hand panel lets users record batch numbers and expiry dates.
    c. The bottom right panel shows the reminders to be added in the future.



3. To mark the reminder as done make sure the reminder is ticked in the top part of the window. Setup options can automatically tick due reminders if required.

4. Click **Accept** to confirm reminders and continue.

Setup options to Mark Vaccination as Done at billing

You can control what, if any, vaccination are marked as done at billing via the setup options located in **Options | Setup | Misc | Reminders | ….**

Reminder Due shown to Mark as Done

This option shows determines which reminders to **show** in the reminder window at billing, as specified by the month to look forward and backward. This option just shows the reminders so vets are aware they are due, it will not automatically tick.

Reminder Due Auto-Marked as Done

This option shows determines which reminders **will be automatically ticked** in the reminder window at billing, as specified by the months to look forward and backward. You can also tick **Mark same Type only** so the only due reminders marked as done are those where the reminder type is being added in the future at the same time.

Sending Reminder Mailers

Creating Reminder Run Based Templates

If you require a separate mailer with specific / custom content for each type of reminder you can assign the mailer to the reminder types **under Options | Picklist Setup | Misc | Reminder Types | select Reminder Type | Tick Use Rem Run Based Template | select Template tab | create relevant mailer templates as required**. 2nd and 3r run templates can be created as well. A Generic Reminder template will need to then be added as well as below.

Add New Single Generic Reminder Template

If you require just one mailer for all reminders with the same content you can set up the mailer from **Reports | Reminders/Recall | Add new…**

- Enter a name.
- Set category to client or animal.
- Set One Entry per
  - Animal: Prints / Sends one reminder for each animal
  - Letter: Combines animals with reminders due into one mailer as long as the reminder list mail-merge is used in the mailer. One Entry per letter cannot be used with SMS or Reminder Run based templates.
- Choose mailer types to send. Eg. Letter, Email, SMS.
- Create or edit mailer template for relevant mailer required.

Sending Vaccination Reminder Mailers

1. Go to **Reports | Reminders/Recalls | Client.**

2. Double click the Generic Reminder template created previously.

3. Select filters to generate list of clients to send mailers to.
    a. Reminder Type: Vaccination
    b. Rem Status: Due
    c. Reminder: All or select a specific reminder if you want to only send one reminder type.
    d. Due Range: Select the due range you wish to send reminders for. You would usually select a past date to pick up overdue reminders.

4. Select next to generate a list of clients to send mailers to.

5. The list will show each client with and the type of reminder they will receive.

6. Click process and SMS and email will automatically be sent. Letters will be printed.

7. If Reminder Based templates are used the specific attached to the reminder type will be generated. If no reminder based template exists the generic template will be used.

Creditors

Create a New Supplier

1. Click on **Creditors | Suppliers.**
2. The supplier search window will open.
3. Click on the **'F7: New'** button and a blank supplier record will be displayed.
4. Enter the relevant information for the supplier and once finished click on the red tick button to save the new supplier record.

Ordering

New Order

To create a new order for a supplier go to;

1. Click on **Creditors | Orders | New Order.**
2. A supplier search window will open where you can search for the supplier.
3. Once you have selected a supplier, an order form will open.
4. Enter your staff ID and the store you are ordering for.
5. Search for the products you wish to order.
6. Once the item has been selected you are able to change the supplier code if you wish and the quantity ordered. Press the down arrow key to open a new search window for your next product.
7. To finish the order click on **F12: Finish** (Non EBIZ), or **Send** (EBIZ) to finish.

Automatic Order

Automatic orders will populate an unfinished order with items based on SOH that is below a minimum value set on the product record with a quantity to make up the maximum quantity set on the product record. To make automatic order go to;

1. Click on **Creditors | Orders | Make Automatic Order.**
2. Select either **Make Order for a Preferred Supplier** or **Make Order For Preferred Supplier(s)**
3. Orders will be created and placed into the Unfinished order window will open automatically.
4. Select the automatic order you wish to confirm.
5. Edit / add / delete items as necessary.
6. To finish the order click on **F12: Finish** (Non EBIZ), or **Send** (EBIZ) to finish.

Inwards Goods Invoice

New Invoice

1. Click on the **Creditors | Invoice | New Invoice**.
2. A supplier search window will open where you can search for the supplier.
3. Once you have selected a supplier, an invoice form will open.
4. Check Invoice, Arrival and payment dates are correct.
5. Enter your staff ID and the store you are invoicing for.
6. Search and enter the products you wish to invoice / receipt.
7. Edit quantities and buy prices.
    - If buy price exceeds the old list price, the list price will update. Untick new list price if you do not wish this to happen.
    - If the list price increases, the sell prices will update. Untick new sell prices if you do not wish this to happen.
8. To finish the invoice click on **F12: Finish.**

Convert Order to Invoice

1. Click on the **Creditors | Invoice | Convert Order to Invoice**.
2. An order search window will open where you can select the order to convert.
3. Once you have selected an order, an invoice form will open with all the items from the order.
4. Check Invoice, Arrival and payment dates are correct.
5. Enter your staff ID and the store you are invoicing for.
6. Edit quantities and buy prices.
    - If buy price exceeds the old list price, the list price will update. Untick new list price if you do not wish this to happen.
    - If the list price increases, the sell prices will update. Untick new sell prices if you do not wish this to happen.
7. Search and enter any extra products you wish to invoice / receipt.
8. To finish the invoice click on **F12: Finish.**
9. A prompt will ask if you wish to place any items not received on back order.

Downloaded Invoice

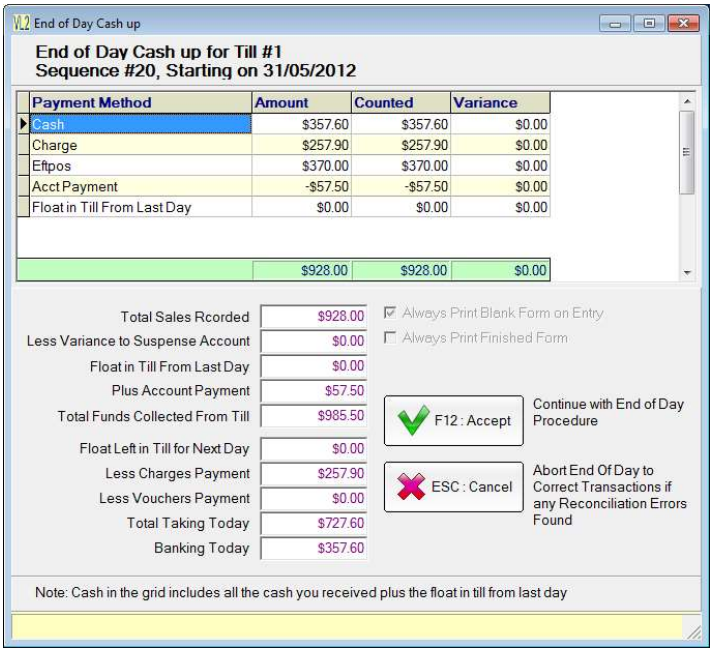
1. Click on the **'Creditors' | Invoice | Unfinished / Downloaded Invoices**.
2. An unfinished/downloaded invoices window will open where you can select the downloaded invoices.
3. Once you have selected an invoice, an invoice form will open with all items, quantities and prices pre-entered.
4. Check Arrival and payment dates are correct.
5. Enter your staff ID and the store you are invoicing for.
6. Edit quantities and buy prices.
    - If buy price exceeds the old list price, the list price will update. Untick new list price if you do not wish this to happen.
    - If the list price increases, the sell prices will update. Untick new sell prices if you do not wish this to happen.
    - Items will price increases will automatically be coloured blue for easy identification. Items will price decrease will be coloured red.
7. Items with an exclamation mark icon have a code that is not entered in VetlinkPro. You will need to link this to an existing or new item to continue by clicking on the exclamation icon.
8. To finish the invoice click on **F12: Finish.**
9. A prompt will ask if you wish to place any items not received on back order.

Staff Access

- Access levels can be created under **Options | Setup | Staff | Access.**
- Staff can be assigned to an access level on **Staff Record | Staff tab | Access Level** and **Change Password** (default password is '*password*').
- The Log in timeout can be changed per PC under **Options | Setup | Misc | At Startup | Idle secs before Logout.**

End of Day

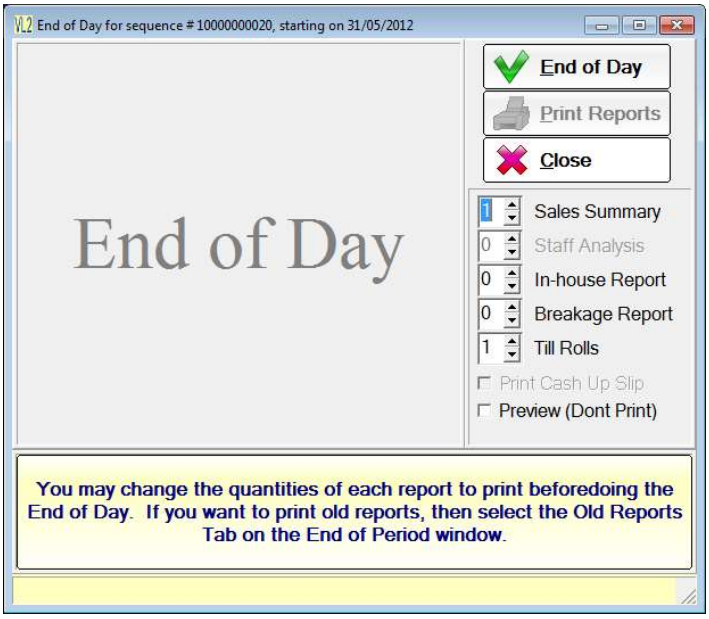
1. Click the **Utilities** menu then **End of Period**.
2. Make sure you are on **1:Day tab**.
3. Click **Start End of Day** Button.
4. Click **Finish Float Handling**.
5. If configured in Setup the print EOD reports window will open. This can be disabled in Setup if required.
6. Print reports and Till Rolls as required.
7. The Cash Up window will open. The Counted and Amount columns will be automatically populated with the amount VetlinkPro thinks you should have for each payment method.



8. Enter the amount counted for each payment method. If there is a difference between the counted and amount columns a variance will show.
9. If the amounts are correct or you do not want to correct variances click **Accept**.
10. If you wish to correct variances click **Cancel**.
    a. Variances must be fixed on the **SAME COMPUTER EOD WAS STARTED ON**
        i. Entering new bills if something was not entered.
        ii. Finishing any unfinished bills
        iii. Using edit bills to fix mistakes on bill.
        iv. Using Change Payment Method to change payment methods entered incorrectly.
    b. Once correction have been made go back into **Utilities | End of Period | 1: Day tab | click Start End of Day or Finish Float Handling | Accept Cash up**.

11. Click **COMPLETE END OF DAY.**

12. The Print Reports window will open.



13. Select the how many copies of each report you wish to print.
    a. To just display the reports on screen, tick the Preview (Don't Print) box.
    b. To not display/print any reports, set all of the reports to 0.

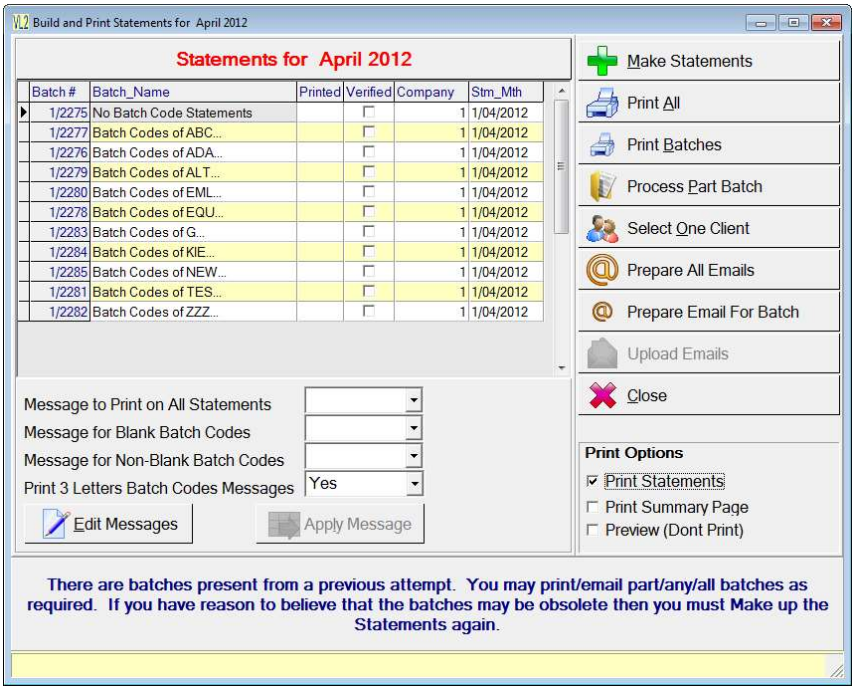
14. Click **END OF DAY** and then **CLOSE**

End of Month

Performing Debtors End of Month

1. Go to **Utilities | End of Period | 3: DB Mth tab**.

2. Click the **'Print Statements'** button to open the statement screen.



3. Configure all the messages that you want to appear on statements by choosing the message from the drop down menus.

4. Click Make Statements button. This will add all transactions for the period being closed and messages to the client's statement.

5. Ensure the **'Print Statement'** box is checked and click the **'Print All'** button.

6. All Statements will now be printed.

7. Check statements for mistakes.

    a. If transaction need to be added / correct close the End of Month screen and fix.
    b. Make sure any corrections are dated into the period being closed (batch Mode)
    c. Once corrections are made go back to **Utilities | End of Period | 3: DB Mth tab** | Complete Statements.
    d. Select Messages again.
    e. Click Make statements to include changes on statements.
    f. Click Select One Client to print only the statements where changes have been made.

8. Once you are happy statements are correct verify each batch by placing a tick in the Verify column.

9. Close Statements window.

10. Click **Perform Aging** then **Start Aging.**

11. Click **Close** to close the **Aging Window**.
12. Click the **Perform End of Month** button to open the **End of Month'** menu.

13. Make your selections for the reports to print and number of copies required.

14. Click the **End of Month** button.

15. Each report will print automatically as selected.

16. Click **Close** on the **End of Month** menu.

17. Click the **Release EOM Hold Date** button to complete the End of Month.

18. A prompt will now appear telling you end of month was successfully completed.