

SOFTWARE UPDATE NOTES



You should read this document thoroughly before updating to the latest version 6.0 of VETLINKSQL. While there are many changes within the update, the major feature-changes and feature-additions are described here in some detail. For further assistance, and for further minor updates since the publication of this document, please refer to the online help system under the **Help / What's New...** menu.

These notes are VERY IMPORTANT and should be handed out to every member of your team so that they can become more efficient at using VETLINKSQL. We commonly find that many users in a clinic are unaware that the system can be used in a more efficient manner, either due to a lack of training, or simply because the feature-set has been improved in new versions but they have not been informed!

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Architecture Changes

The development tools used for VetLinkSQL in version 6 have now been updated to the latest version. Along with the database upgrade in version 5 our development team now have more scope for some exciting features and changes in future versions including modernising the interface over time.

Billing

Invoice Based Payments

This is a major internal architectural change to VetLinkSQL's Accounts Receivables system since its inception. From version 6 VetLinkSQL will support invoice-based payments. This means you will be able to allocate account payments to specific invoices. A new Due field on the invoice will then show the amount left on the invoice that still needs to be paid.

As all payments and credits need to be assigned to invoices, the Owing and Credit balances will be separated so you can clearly see what credits can be assigned to invoices. For more information on how Invoice Based payments will work please refer to Appendix 1.

Bloggs Joe
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Inv Num # 1/627960
Rqst Staff
Last Staff *SUP*
Tax Invoice
Sequence No. 6284

Owes \$145.20

1 : Bill

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item_Scripts
1	AC	R	10	Hills Cat S/D 156gm	\$34.00		\$34.00					0	0

2 : History

Account Status
ClnUpdtd
31/12/2019 3:53:36 PM
Inventory Status
StkUpdtd
31/12/2019 3:53:36 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$34.00	1/682726		31/12/2019

STotal \$29.56
GST \$4.44
Total \$34.00
Due \$34.00

Invoice showing unpaid/due amount

Account Payment for Bloggs Joe
Incentive Discount Expired on 10/12

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$145.20
Total Owning \$145.20

Owed On Last Statement \$0.00
Charged Since \$145.20
Paid Since \$0.00
Incentive Disc Pending \$0.00

Payment to Apply \$34.00
Incentive Discount \$0.00
Amount to Pay \$34.00

Date	Bill#	Total	Due	Allocation
31/12/2019	1/627959	\$50.00	\$50.00	\$0.00
31/12/2019	1/627960	\$34.00	\$34.00	\$34.00
31/12/2019	1/627961	\$61.20	\$61.20	\$0.00

Amount Unallocated \$0.00
Amount Allocated \$34.00

✓ F12 : Accept
✗ ESC : Cancel

Payment screen to allocate payments

Doc Mgr 8 : Contacts

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$79.00
Total \$79.00
Open \$0.00
Batched \$0.00
Total \$79.00

Future Bills: ---
Credit \$75.00

Balance screen with separate section for credit

Macro Complex Product Edit

For Macro complex products only, a new screen will appear when adding a macro to a bill. This new screen will let you;

- Untick items that are not required
- Untick dispensing fees not needed
- Change items that have variable pricing.

Name	Qty	Unit Price
Desex-A-Dog Spey		
<input checked="" type="checkbox"/> Acezine 2 Injection 10ml	0.2	\$5.50
<input checked="" type="checkbox"/> Drug Fee	1	\$7.00
<input checked="" type="checkbox"/> Catheter IV Insyte 22g X 1"	1	\$5.98
<input checked="" type="checkbox"/> Dispensing Fee 3	1	\$10.00
<input checked="" type="checkbox"/> Scalpel Blades	1	\$1.05
<input checked="" type="checkbox"/> Repose/Provive (propofol)	10	\$0.16
<input checked="" type="checkbox"/> Carprieve Tablets 50mg	4	\$0.09
<input checked="" type="checkbox"/> Drug Fee	1	\$7.00
<input checked="" type="checkbox"/> Ketamine 100mg	2	\$0.20
<input checked="" type="checkbox"/> Theatre Pack Large	1	\$67.00
<input checked="" type="checkbox"/> Anaes Gas (Cat&Dog) Per Minute	25	\$1.10
<input checked="" type="checkbox"/> Suture Mono Q 2 Met	1	\$19.08
<input checked="" type="checkbox"/> Consult	0.5	\$65.00
<input checked="" type="checkbox"/> Methadone	1	\$30.25
<input checked="" type="checkbox"/> Drug Fee	1	

Negative Bill Discount

When doing a discount from the bill using the SF9: Disc Bill button, you can now enter a negative discount if setup options are enabled. To enable negative discount go to **Options -> Setup -> Product -> 2: Discounts -> tick allow negative discount**. [BS9033]

Enter Discount Value (This will be added to any discounts already applied on the bill)

% -20 \$ \$0.00

Apply to ☒ All ☐ Current Animal

Add Discount Remove Discount ESC : Cancel

Item	Qty	Unit Price	Total
Desex-A-Dog Spey			
Acezine 2 Injection 10ml	0.2	\$5.50	\$1.10
Drug Fee	1	\$7.00	\$7.00
Catheter IV Insyte 22g X 1"	1	\$5.98	\$5.98
Dispensing Fee 3	1	\$10.00	\$10.00
Scalpel Blades	1	\$1.05	\$1.05
Repose/Provive (propofol)	10	\$0.16	\$1.60
Carprieve Tablets 50mg	4	\$0.09	\$0.36
Drug Fee	1	\$7.00	\$7.00
Ketamine 100mg	2	\$0.20	\$0.40
Theatre Pack Large	1	\$67.00	\$67.00
Anaes Gas (Cat&Dog) Per Minute	25	\$1.10	\$27.50
Suture Mono Q 2 Met	1	\$19.08	\$19.08
Consult	0.5	\$65.00	\$32.50
Methadone	1	\$30.25	\$30.25
Drug Fee	1	\$7.00	\$7.00
Subtotal			\$183.45
GST			\$18.38
Total			\$201.83

Round Price on Bill

A new option has been added under the **More tab** of the **Product record** to round prices on the bill. Previously the unit sell was rounded on the product itself which could inflate prices when the quantity was changed on the bill. Also if part of a unit was dispensed, the item price would be un-rounded as well.

To set rounding on the bill;

1. Go to **Options -> Setup -> Products -> 1: Options Tab -> Set Sell prices to round Up / Down / Off**.
2. Open a product record and under the **More tab** set **Round Sell** to **On Bill**, then set number of cents you wish to round to.

Goods & Services

1: Options | 2: Discounts | 4: E-Ordering | 5: Stock | Prescr

Master

Default Buy Discount: 0

Default Markup: 50

Buy Price variation (%): 20

Sell Prices: Round Off

☒ Allow Services to have Cost Price

☒ Display Price Warning at Billing

Set to round up/down off in setup

Amoxyclav (Produ)

1: General | 2: More | 3: Stock | 4: Discs | 5: Comp

Round Sell: On Bill To: 10

Buy GST: GST

Sell GST: GST

Cauton:

Use Expiry: No Barcode: No L:

Under More Tab of product record set to round on bill and number of cents to round to.

Prices (Inc Tax)

Units: Dose Size: 1

Unit Cost: \$1.10 Dose Cost: \$1.10

Unit Sell: \$4.540 Dose Sell: \$4.540

Pack Sell Price: \$45.400

Ctrl-N

Actions AF3: Exit

Unit price is unrounded on the Product record

Beware muffin bites

All Add Muffin

1: Bill					2: History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Scrip
1	DC \			For Muffin				
2	DC R		4.77	1>Amoxyclav	\$36.70		\$36.70	
3	DC A		1.12	1>Drug Cost \$15	\$15.00		\$15.00	
4	DC ^		4.77	1>Amoxyclav	\$21.70		\$21.70	

Item Price on Bill is rounded

Account History Batch Expiry

When viewing invoices from account history, the batch number AND expiry will show on items where recorded. [BS8257]

Cumin Tegan
22 Ohaupo Road
Auckland 0622 NSW
EXISTING CLIENT

Muffin (# 1/1005), Cat, Birman [?X], Age: 7 years 4 months [20/12/2012]
Last visit at 20/03/2020
Last reminder was due on 25/11/2018 for F5
Weight: 12.00 on 6/06/2019

Inv Num # 1/720
Rqst Staff
Referral 0

Tax Receipt

Credit -\$411.00
Sequence No. 39

All Muffin

1 : Bill										2 : History									
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script Notes	Batch	Expiry Dt	Batch	Qty	Item	Scripts	Action	Ans	PmtPrc	On_Bill	Incen
1	DC	\		For Muffin													Y		
2	DC	R	1	1>Fel-O-Vax F I V Vaccine	\$0.26		\$0.26		1234	17/12/2019	0	0					Y		

Bulk Billing Email

You can now email the Tax Invoices created during bulk billing. If you choose to email the invoices, all clients with an email address on their client record will receive an email with a pdf copy of the invoice attached.

Bills have been generated

Client #	Title	Last Name	First Name	Co Name	Ann Name	Ann Type	Breed	Colour	Address	Home Ph	Work
1/1001	Mr.	Smithy	Dave	Small Farms Limit	Bovine	Cattle Dairy	Other		13 Oxford Street, Paddington, Paddi		
1/1003	Mrs.	Cumin	Tegan		Woof	Dog	Affenpinschi		Po Box 1234		
1/1004	Dr.	Doe	John		Cat	Cat	Devon Rei		23 Street East, Saskatoon, Sas		

F11 : < Back F12 : Next > F6 : Email F7 : Print F8 : Post ESC : Cancel F9 : Batch

Fixes and Tweaks

Apostrophe's in Reversal Note: Apostrophes are now accepted in notes recorded when reversing bills. [BS7972]

Reminders from Smart Flow Sheet: Reminders and lab requests will popup, when an item is imported from SFS. [BS9586]

Syndicate Bill: Added Yes/Cancel option while converting syndicate bill to normal bill on using charge option when the client stop charge is set [BS6730]

Change Client and Animal on Bill: The function to change client and animal on bill now works as expected. This can be done from an unfinished bill -> Actions -> Bill -> Change Client and Animal on bill. [BS9608].

Cancel Button on Print Bill Prompt: The Cancel button has been removed from the bill prompt as users were not realising that it went back to editing the bill. [BS9595]

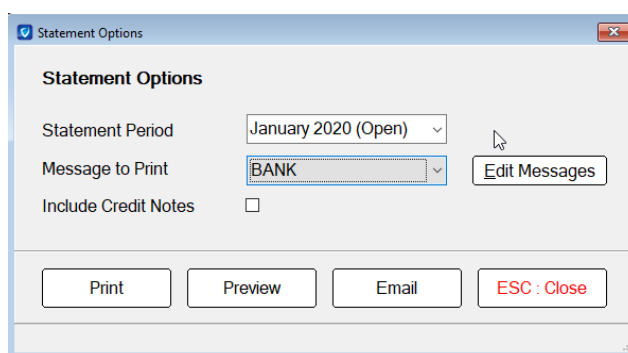
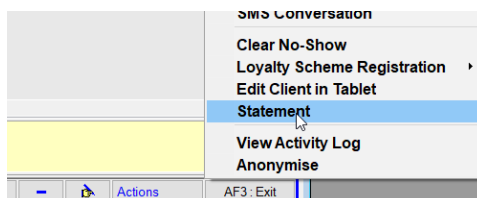
Future Bill Discounts: Future bills will add any discounts that are available for the customers at the time of bill creation [BS9554].

Batch Billing Mobile IDs: The staff ID list for batch billing in VetlinkSQL will no longer include the mobile staff ID's in the list. [BS9746].

Debtors

Email / Print Statement from Client Record

You can now Print, Preview or Email a statement directly from the client record. You can choose any previous month as well as the current month if you need to send it early. Messages can also be added on the fly as well for each statement. To send a single statement go to the [Client record -> Actions -> Statement](#).



Online Statements Email Server

Bulk emailing of statements has been revamped to improve deliverability. Instead of delivery from the vet statement portal address (clinicname@vetstatement.com) and its email gateway, it can now come from your own nominated email address after these have been verified by AWS (Amazon). If you are using our Online Statement Portal then please contact support@cfl.co.nz to provide an email address for verification, after which we will update your Online Statement Portal.

Debtor / Client Management Screen

A new screen for searching clients based on Debtors, Sales Group and “Flag Category” is now available. It is mainly intended for managing debtors. This new screen is available under [Utilities | Manage Debtors / Clients](#). See screenshot on following page.

The debtors screen will;

- First split your debtors into tabs: [3 month+](#), [2 month](#), [1 month](#) and [Current](#).
- Under each monthly overdue tab you then have options to filter by [category](#), [mailing list](#)
- The [Search](#) field on the left hand side will let you search and filter by [Batch Code](#), [First name](#), [Last Name](#) or [Company](#).
- The top panel on the right hand side will list any contacts for that client. E.g. The contact is where you can record other contacts for the client/company such as Account Manager, Farm Manager, Husband, Wife etc....***
- The middle panel on the right hand side will;
 - Show the last communication in the client document manager
 - Allow a new document manager note/email/sms to be entered.
 - SMS / Email templates for overdue accounts can be configured to be able to quickly send account reminder messages.
- The bottom section on the right-hand side allows you to quickly enter a To-Do note for a staff member. E.g. Create as task to follow-up in a few days or check with a Vet in a day when they are in and so on.

***Client contact types can be added in [Options | Picklist Setup | Client | Employee Position](#). Contacts for each client can then be added in Client Record under Contacts tab.

Manage Debtors / Clients

Debtors Manual Sales

3 Mth + 2 Mth 1 Mth Current

Category Num Cln Category Mailer List Num Mailer List

Hide Inactive Clients

Search in All

* Total excludes credit available

Last Name	First Name	Mobile	Work Ph	Home Ph	Current	1 Mth	2 Mth	3 Mth +	Total	Last Paid On	Paid Amt	Contacted On	Batch
Test	Example				\$0.00	\$15.00	\$10.00	\$120.00	\$145.00	5/12/2019	\$20.00		
Read	Joseph	021 1234567			\$0.00	\$15.00	\$15.00	\$117.00	\$147.00			20/04/2020	
Little Man Stud					\$0.00	\$15.00	\$15.00	\$245.29	\$275.29				
Cmc Stock					\$0.00	\$15.00	\$15.00	\$386.65	\$416.65			20/02/2019	
Walker	Jameson				\$0.00	\$15.00	\$15.00	\$415.00	\$445.00			20/02/2019	
Hupta	Rohan				\$0.00	\$15.00	\$15.00	\$558.30	\$588.30				
Jake	Rauler				\$0.00	\$0.00	\$0.00	\$584.65	\$584.65				

Client Communication

Todo list for Staff

Joseph Read

Hide Inactive Contacts

Id	Last Name	First Name	Position	Comment	Phone
	Ferguson	Fergus	Farm Manager	Available ur	09 489228

Last Message New Message New Email New SMS

Phoned about overdue account. He will pay soon.

To-Do List for Client Test

From	Date	Time

View To-Do List From

Last 3 months Last 6 months Current

Unread Items Unfinished Item

F12: Done Del: Cancel

Select Template

Select Email Template

OverDue Account.HTM (Template)

Blank (HTML)

Client Email.HTM (Template)

OverDue Account.HTM (Template)

F12 : OK ESC : Cancel

Select email template

Client Bills Still Due

A new filter has been added to the client record under the History tab called Only due. This filter will let you quickly find the bills that are still owing.

Cumin Tegan (Client # 1/1003)

1 : General | 2 : More | 3 : Marketing | 4 : Financial | 5 : Info | 6 : History | 7 : Doc Mgr | 8 : Contacts

8 : Bills | 9 : Transactions | 0 : Quotes

Date Range: ☒ 27/08/2017 ☐ 27/08/2020 Bill Type: **D : Only Due**

F12 : Search

Num	Type	Inv_Date	Dis_Date	Acc_State	Inv	StkUpdt	x2	Total	Complaint	Dis_Ti
# 1/923	FEE	31/07/2020	31/07/2020	Aged	StkUpdt	0.24	0.02	0	\$5.00	14:47
# 1/922	FEE	30/06/2020	30/06/2020	Aged	StkUpdt	118.18	11.82	0	\$10.00	14:47
# 1/818	INV	8/07/2020	1/06/2020	Aged	StkUpdt	59.09	5.91	0	\$165.99	22:24
# 1/746	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0		0	\$54.51	22:24
# 1/723	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0		0	\$22.49	22:24
# 1/719	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0		0	\$0.26	22:25
# 1/667	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0		0	\$130.00	22:25
# 1/632	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0		0	\$65.00	22:23

Bill Type Dropdown: A : All, F : Future Bills, R : Refunds, B : Open Batched Bills, U : Unfinished, I : Account Fee/Interest, **D : Only Due**

Xero / General Ledger

Credit Available GL Account

Over payments and prepayments are now separated from accounts receivables in the general ledger. After the upgrade clinics with General Ledger or Xero integration will need to create this account in their chart of accounts (both VetlinkSQL and Xero). Then it can be assigned in [Options| Picklists| General Ledger Code | Credit Available](#).

General Ledger Codes

Buy GST	Incentive Discount
Buy @Tax2	End of Day Variance
Sell GST	End of Day Float
Sell @Tax2	Rounding Adjustments
Debtors Control	Suspense
Creditors Control	Default Bank
Misc Sales	Purchase Discount
Misc Cost of Sales	Breakages
Misc Stock On Hand	In-house Usage
Misc Service Value	Stock Take/Adjustment
Misc Fees	Dbt Historical Balance
Misc Purchases	Crd Historical Balance
Misc Assets	Bad Debt Write Off
Account Fees	Credit Write Off
Account Interest	Freight on Purchases
Credit Available	Total Income
External Sales Suspense	

Cancel Changes | F12 : Save GL Codes

Large Animal Prescriptions

Change Date / Change Quantity Options Disabled

The prescription options to change date and change quantity have now been removed to comply with legal requirements. This is so the prescription that is printed and given to the farm always matches what was created in VetlinkSQL.

As changing dates and quantities may still be required the large animal prescription will now allow prescriptions to be created for the same and overlapping date ranges.

You can still inactivate prescriptions if you accidentally created a prescription incorrectly and need to get rid of it and start again with a new prescription.

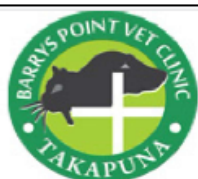
For more information on setting up Large Animal Prescriptions see Appendix 2.

Client Prescription Note (Supply Number)

A new client prescription note has been added. This is intended to be used for entering the Supply Number's for the Farms, however may be used for other notes that you need printed on the prescription form as well.

To set these up go to the [Client record | General tab | Ctrl-N \(Notes\) button | Add New note | tick Print on Prescription](#).

In the Prescription templates then add the Client Note mail merge field as per section below on Customising Prescription forms



BARRYS POINT VET CLINIC
imaginary Vet Clinic

CFL Test Database

21 Barry's Point Road, Takapuna, Auckland., Ph: (09) 489-2280

Production Animal Authorisation For Future RVM

27/08/2020

Mr. Dave Smithy

13 Oxford Street Paddington Paddington NSW 2021

Small Farms Limited

Supply Number 1234 -5678, 2345-9876

Drug Name	Qty	Start On	Finish On
Depocillin Inj - Per ML	100	30/04/2020	30/05/2020

Prescribed by Mr. Read, Joseph on 30/04/2020

MILK WHP: 1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days

MEAT WHP: Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days

Not for use in bobby calves

Active Ingredient: GREEN: Procaine penicillin 300,000IU/ml

Indications: Good for superficial infections (wounds and abscesses). Not for use in calves

Dose: Large animals: 1ml/25kg i.e. 20mls per 500kg

Frequency: Repeat if required at 48 hour intervals up to 3 times

Administration Site: Into the muscle

Storage: Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e. only 5 months

Customising Prescription Forms

Prescription forms can now be customised to either print one form per drug, or a combined form with all drugs included on it. With the combined form a new Print on Prescription note option will let you pre-set Active Ingredients, Withholding notes, Dosages etc.. so they are automatically merged onto your form.

For more information on setting up Large Animal Prescriptions see Appendix 2.

Editing the Default Prescription Form

1. Go to **Options | Picklists | Products | Restricted Products Profiles...**
2. Click **Edit A4** or **A5 template**.
 - a. A5 Template: This is the template that will be printed for each prescription item.
 - b. A4 Template: This is the combined prescription template. Where each prescription is merged onto one form.

Number	Name	Status
1	RVM Class 1	A
2	RVM Class 2	A
3	RVM Class 3	A
4	Schedule 4	I
5	Schedule 5	I
6	Schedule 6	I
7	Schedule 7	I
8	Schedule 8	I
9		I
10		I
11		I
12		I
13		I
14		I
15		I
16		I
17		I
18		I

Print Templates

Edit A5 Template

Edit A4 Template

Configuration Options:

Name: RVM Class 1
Status: Active
RVM Class: Class 1

Sales Authorisation
Log In Required: Yes
Always Log In: No

Prescription
Prescription Req'd: Yes
Production Only: Yes
Generate Document: Yes
Default Months: 1
Exclude Batched: Yes

Purchase Validation
Log In Required: No

Other
External Register: No
Record Expiry / Batch: No

F2 : Save Esc : Cancel

Default Forms in Picklists

Customising a Products Prescription Form

1. Open the product record and click on the **2: More** tab.
2. At the bottom of the form you should now see two buttons, **Default** and **Customise**. Click either to select which one to print. The button highlighted blue is the current form being used.
3. If you click on the **Customise** button a word processor will open for you to create a custom prescription form where you can add in the specific withholding periods, active ingredients, dosages, etc... as required.

Depocillin Inj - Per ML (100 ml) (Product# 1/1002)

1: General | **2: More** | 3: Stock | 4: Discs | 5: Complex | 6: History | 7: Stats | 8: Doc Mgr

Round Sell: On Product To: 1

Buy GST: GST

Sell GST: GST

Caution:

Use Expiry: No Barcode: No Label:

Category-3: Farm Manufacturer:

Category-4: Default Franchise:

Category-5: Default **RAM KPI** Default:

Export To: A Prescription Group: Datto

☒ A: Mobile ☐ B: Web ☐ C: SFS

Prescription Default Custom Link to Diary Reason(s)

Apply price changes on Purchase Invoice entry

Update List Price when new Buy Price exceeds: Yes

Custom Prescription form in Product Record

PRODUCTION ANIMAL PRESCRIPTION
AUTHORISATION FOR SUPPLY

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland.
Ph: (09) 489-2280

Rx

This prescription is for Animal Use Only
Prescription Animal Remedy (PAR) Prescription Medicine

30/04/2020 12:42:29 a.m.

Small Farms Limited
Dave Smithy
13 Oxford Street
Paddington Paddington

Name & Strength	Depocillin Inj - Per ML
Active Ingredient	Procaine penicillin 300,000IU/ml
Qty Available	100
	**** Period must not exceed 6 months supply ****
Start Date	30/04/2020
Expiry Date	30/05/2020
Indications	Good for superficial infections (wounds and abscesses). Navel ill in calves
Dosage	Large animals: 1ml/25kg i.e. 20mls per 500kg
Frequency	Repeat if required at 48 hour intervals up to 3 times
Admin Site	Into the muscle
Storage	Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e only 5 months
Milk Withholding	1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days
Meat Withholding	Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days
Other Precautions	Not for use in bobby calves

NOTE: Animals must not be slaughtered until AFTER the withholding period has expired. This prescription must be first dispensed within 30 days of the above date.

Signed: Dr Joseph Read [JR]


Withholding Period and Prescription Notes

Any special product related notes such as Withholding periods, active ingredients, dosages etc....these can be set up as advanced notes to print on the combined prescription form (A4 Template). To set these up go to the **Product record | General tab | Ctrl-N (Notes) button | Add New note | tick Print on Prescription**.

Adding note to print on Combined Prescription (A4 template)

Drug 1
Depocillin

Drug 2
Oxytocin



BARRYS POINT VET CLINIC

Imaginary Vet Clinic

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland., Ph: (09) 489-2280

Production Animal Authorisation For Future RVM 27/08/2020
Mr. Dave Smithy 13 Oxford Street Paddington Paddington NSW 2021
Small Farms Limited
 Supply Number 1234 -5678, 2345-9876

Drug Name	Qty	Start Date	Finish Date
Depocillin Inj - Per ML Prescribed by Mr. Read, Joseph on 30/04/2020 MILK WHP: 1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days MEAT WHP: Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days Not for use in bobby calves Active Ingredient: GREEN: Procaine penicillin 300,000IU/ml Indications: Good for superficial infections (wounds and abscesses). Navel ill in calves Dose: Large animals: 1ml/25kg i.e. 20mls per 500kg Frequency: Repeat if required at 48 hour intervals up to 3 times Administration Site: Into the muscle Storage: Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e only 5 months	100	30/04/2020	30/05/2020
Oxytocin Ethical Agents Prescribed by Mr. Read, Joseph on 30/04/2020 Milk WHPs: Nil Meat WHP: Nil Indication: Heifer milk let down; After a difficult calving Dose: 1-2ml at milking for let down; 1ml/100kg after calving Frequency: As required Administration site: Into the muscle Storage: Store below 25 degrees. Protect from light	100	30/04/2020	30/05/2020

Following this consultation the listed RVM(s) may be dispensed. By signing this form, the farmer/manager agrees that they will use the drugs according to instructions, contraindications and withholding times and accepts responsibility for ensuring that staff complies with the expectations of this authorisation. Use of these drugs will be documented as to the animal on which they were used, the time, date and dosage, as well as withholding period. CFL Test Database reserves the right to refuse sale of such drugs if the documentation of on-farm drug use does not satisfy requirements. On farm training for correct administration and storage of these medicines has offered.

Prescribing Veterinarian:

Date:

Signature:

Farmer/manager:

Date:

Signature:

Combined Prescription form with all items (a4 template)

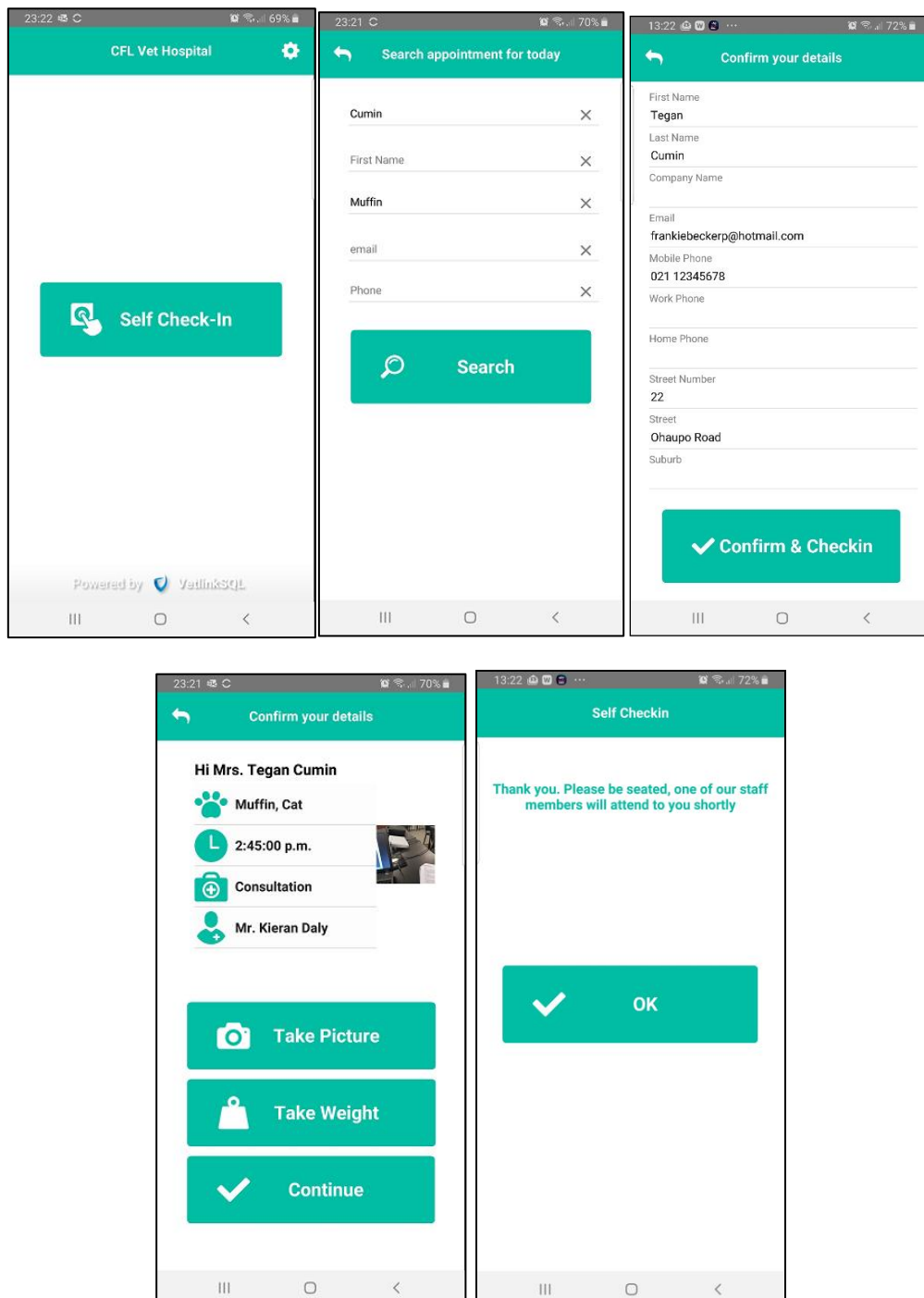
Mobile Apps / Client Portal

Checklink

A new mobile app is now available for clients to self-check-in. The app can be downloaded to an Android or Apple tablet. Clients arriving at the clinic can then use the tablet to find themselves and check themselves in. Checking in will arrive the client/patient in the diary in VetlinkSQL.

Based on your configuration preferences, the app allows clients to take a picture of their pet, enter the weight and check contact details. These options are controlled by a setup option in the app to turn on or off.

Contact sales@cfl.co.nz to enable to app.



Client Portal and Mobile App

The Client Portal has had a facelift and will now come with a matching free MyVet App for your business as well. All existing clients will be automatically migrated to the new portal in the next few weeks. This is a complete rewrite that adheres to modern minimalist design principles and a technology base that will allow more features to be added in 2020 and beyond.

For more information please email sales@cfl.co.nz for a demo account to explore.



Heska Analyser Integration

Heska Analyser Integration

VetLinkSQL now supports 2 way integration for Heska Analysers. Products/Test items in VetLinkSQL can be set up to automatically trigger a request to be sent to the relevant analyser. When the test is done the result is then automatically imported back into VetLinkSQL to the same visit that generated the request. For more information on how the Heska integration works please see Appendix 4.



Note that two way integration is already available for the Idexx labstation and Zoetis Fuse as well. To enable any of these modules please contact sales@cfl.co.nz.

Telemedicine

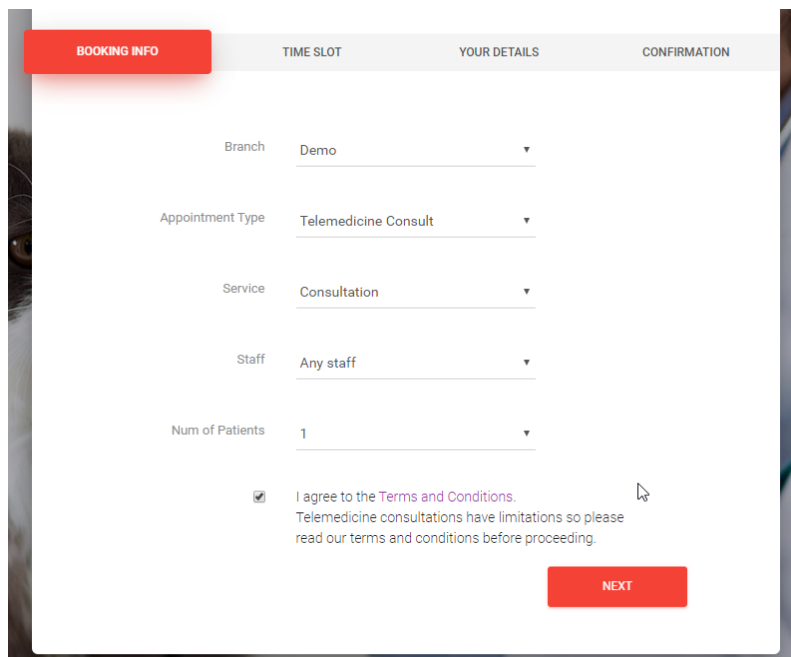
Telemedicine Consults

A new option for making tele-medicine consults has been added to the online booking module and VetlinkSQL. VetLinkSQL has integrated with the software Zoom to provide the ability to perform video consults over the internet.

Note: Telemedicine is not available for Consult Room Type columns.

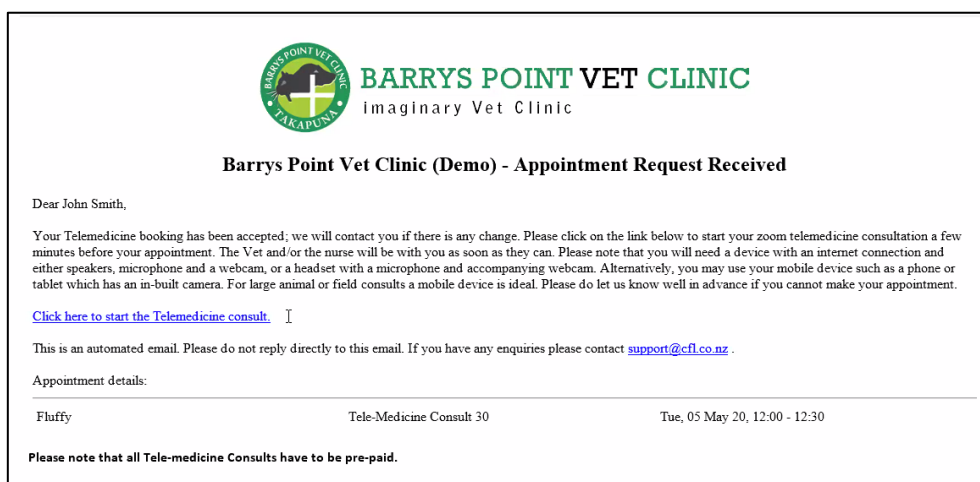
How Telemedicine Booking work in Online booking:

- When a client books an appointment online they can now choose whether to do a telemedicine consult. The clinic can set which reasons can be done by telemedicine.
- Only certain staff enabled for telemedicine can have telemedicine appointments made for them. You can block times to prevent telemedicine or in-clinic appointments being booked at certain times of the day depending what the staff is rostered to do.
- Once the booking is made, telemedicine specific messages and emails are sent advising of any guidelines for the telemedicine consult.
- The meeting will be automatically created in the zoom account and the link to the meeting will be sent in the email to the client as well.



The screenshot shows a web form titled 'BOOKING INFO' with tabs for 'TIME SLOT', 'YOUR DETAILS', and 'CONFIRMATION'. The form contains several dropdown menus: 'Branch' (Demo), 'Appointment Type' (Telemedicine Consult), 'Service' (Consultation), 'Staff' (Any staff), and 'Num of Patients' (1). Below these is a checkbox labeled 'I agree to the Terms and Conditions.' with a link to 'Terms and Conditions.' and a note: 'Telemedicine consultations have limitations so please read our terms and conditions before proceeding.' A red 'NEXT' button is at the bottom right.

Online booking telemedicine option



The screenshot shows an email confirmation from Barrys Point Vet Clinic. The header includes the clinic's logo and name: 'BARRYS POINT VET CLINIC Imaginary Vet Clinic'. The subject is 'Barrys Point Vet Clinic (Demo) - Appointment Request Received'. The body of the email is addressed to 'Dear John Smith,' and contains the following text: 'Your Telemedicine booking has been accepted; we will contact you if there is any change. Please click on the link below to start your zoom telemedicine consultation a few minutes before your appointment. The Vet and/or the nurse will be with you as soon as they can. Please note that you will need a device with an internet connection and either speakers, microphone and a webcam, or a headset with a microphone and accompanying webcam. Alternatively, you may use your mobile device such as a phone or tablet which has an in-built camera. For large animal or field consults a mobile device is ideal. Please do let us know well in advance if you cannot make your appointment.' A link is provided: 'Click here to start the Telemedicine consult.' followed by a cursor icon. Below this is a note: 'This is an automated email. Please do not reply directly to this email. If you have any enquiries please contact support@cfl.co.nz.' The appointment details are listed in a table: 'Fluffy', 'Tele-Medicine Consult 30', and 'Tue, 05 May 20, 12:00 - 12:30'. At the bottom, it says 'Please note that all Tele-medicine Consults have to be pre-paid.'

Telemedicine email confirmation with Zoom meeting link

How Telemedicine Booking work in VetlinkSQL:

- If the telemedicine booking has been made online the telemedicine link will be downloaded into the VetlinkSQL appointment so you can launch the telemedicine consult from VetlinkSQL.
- Only certain staff enabled for telemedicine can have telemedicine appointments made for them. They will be indicated on the diary by a blue camera icon.
- Once the booking is made, telemedicine specific messages and emails are sent advising of any guidelines for the telemedicine consult.
- Telemedicine appointment are indicated by a blue camera icon on the appointment.
- The meeting will be automatically created in the zoom account and the link to the meeting will be sent in the email to the client as well.
- If the telemedicine consult is moved round on the VetlinkSQL diary the zoom meeting details are automatically adjusted.

[← Prev Day](#) 24 Today, Thursday 27th August 2020

Ruler	Small Animal	Surgery	Hospital	Farm Calls	Deleted
	MCD - Dr. Jenny Jones	GS - Goran Smart	RR - Roger Rabbitt		
05pm		Joe Bloggs Fluffy [??] Cat, Abyssinian, () Consultation 094892280(W) / 02141234567(M)			

Computer Fanatics Veterinary Hospital

Dear Joe Bloggs ,

This is a reminder of your upcoming telemedicine consultation. Please click on the link below to start your zoom telemedicine consultation a few minutes before your appointment. The Vet and/or the nurse will be with you as soon as they can. Please note that you will need a device with an internet connection and either speakers, microphone and a webcam, or a headset with a microphone and accompanying webcam. Alternatively, you may use your mobile device such as a phone or tablet which has an in-built camera. For large animal or field consults a mobile device is ideal. Please do let us know well in advance if you cannot make your appointment.

[Click here to join the Telemedicine consult.](#)

Appointment details:

Fluffy	Consultation	Thu, 27 Aug 20, 17:00 - 17:15
--------	--------------	-------------------------------

Please read the Terms and Conditions on our website, please cancel the appointment if you disagree with these.

Please note that all Tele-medicine Consults have to be pre-paid.

Example of default telemedicine appointment reminder message (customisable by user)

	<div> <div>Telemed</div> <div> <div>Bill</div> <div>History</div> <div>View Animal Details</div> <div>View Animal History</div> <div>View Client History</div> <div>View Address Directions</div> <div>Take Animal Photo</div> </div> </div>	<div> <div>Start Meeting</div> <div>Send Telemed Link By Email</div> <div>Send Telemed Link By SMS</div> <div>Convert to Standard Appointment</div> </div>
<div> <div>Joe Bloggs</div> <div>Fluffy [??] Cat, Abyssinian, ()</div> <div>Consultation</div> <div>094892280(W) / 02141234567(M)</div> </div>	<div> <div>Email / SMS</div> <div>Print History</div> <div>Print Form</div> </div>	

Starting a Telemedicine appointment

Online Booking

Existing Client Question

A new option on the booking form allows a client who is not logged in to indicate if they are an existing client so you can avoid creating duplicates in case it is under another name – gives you the opportunity to call to confirm.

BOOKING INFO TIME SLOT **YOUR DETAILS** CONFIRMATION

Continue as a Guest or **LOGIN**

New Client?

First Name

Last Name

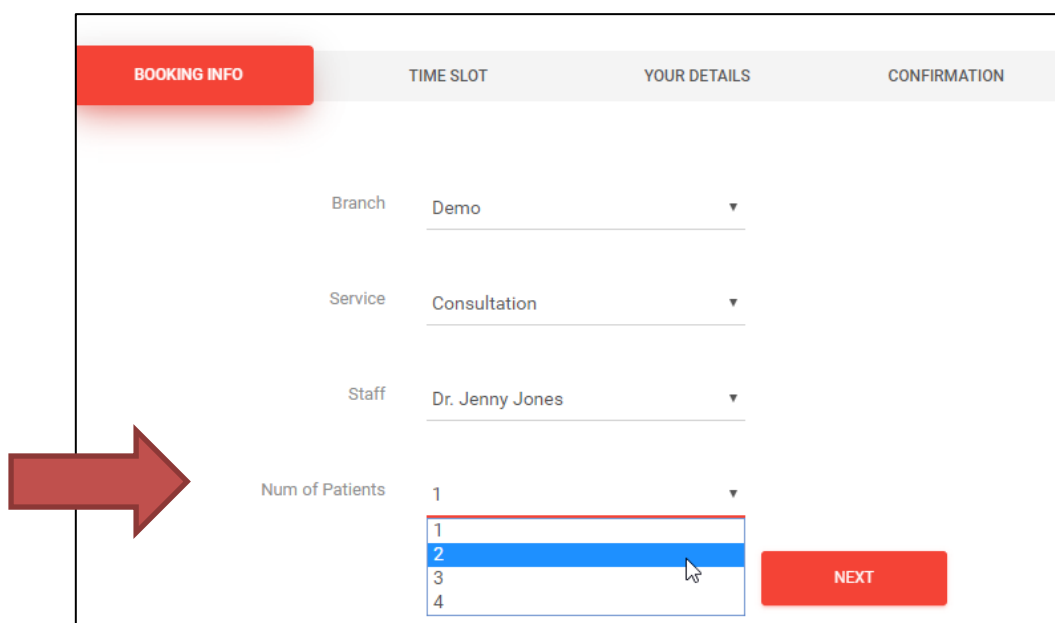
Phone

13/03/2020 ☀️ Online Client Goran Smart Consultation 098336143(W) / 09(H) 1:15 PM - 1:30 PM (15) New client: Joe Bloggs. Patient: fluffy. Species: Cat Phone: 12345678 Email: su	13/03/2020 ☀️ Online Client Goran Smart Consultation 098336143(W) / 09(H) 2:15 PM - 2:30 PM (15) Existing client: Jason Lee. Patient: Piggy. Species: Pig Phone: 02102925554 Email:
---	--

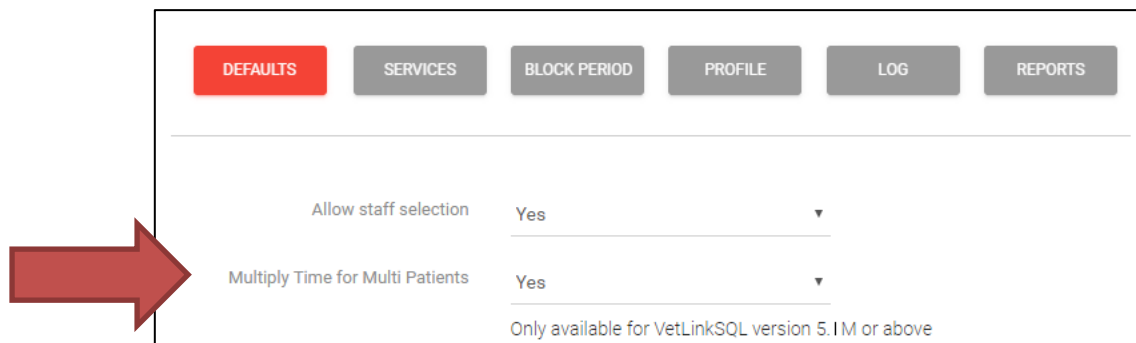
Multiple Animals

A new option for Number of Patients has been added to the online booking form where a client can specify the number of patients they are booking in. In tandem with this there is a setup option (your choice) that allows you to “multiply” the time slot period if they are bringing multiple pets. For example, if the client books a consultation which is normally 15 minutes for 1 animal, but **Num of Patients** is set to 2, the appointment will be made for 30 minutes.

To enable the **Multiply by Number of Patients** option go to **Admin portal -> Defaults -> Set Multiply Time by Multi Patients** to **Yes**.

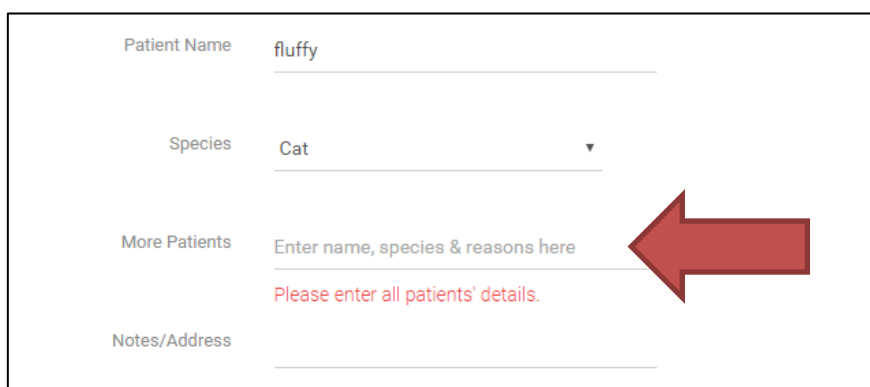


The screenshot shows the 'BOOKING INFO' tab of the online booking form. The form includes fields for Branch (Demo), Service (Consultation), Staff (Dr. Jenny Jones), and Num of Patients (1). A red arrow points to the 'Num of Patients' dropdown menu, which is open, showing options 1, 2, 3, and 4. A red 'NEXT' button is visible to the right of the dropdown.



The screenshot shows the 'DEFAULTS' tab of the Admin portal. The 'Multiply Time for Multi Patients' option is set to 'Yes'. A red arrow points to this option. Below the option, it states 'Only available for VetLinkSQL version 5.1M or above'.

Finally, if they are bringing multiple pets, a new mandatory field requests further information.



The screenshot shows the online booking form with the 'More Patients' field highlighted by a red arrow. The field is labeled 'Enter name, species & reasons here' and has a red error message below it: 'Please enter all patients' details.' The other fields shown are Patient Name (fluffy), Species (Cat), and Notes/Address.


Reports

Tax Invoice Footer

A tax receipt/invoice footer has been added into setup. This was created so you can add a formatted remittance to the bottom of the tax receipt / invoice that includes payment details. Therefore, if you add a footer on it will automatically print a message advising the client what their client number is.

To add a footer;

1. First create your footer image. The optimal width is 721 px for A4 and 500px for A5 and must be a png file.
2. Then go to **Options -> Setup -> Printer -> Print Logos**.
3. Click Set A4 or A5 Report Footer and browse to the location of your footer.
4. Close and Save setup.
5. Go to **Options -> Picklists -> Other Reports -> Change category to Invoice -> double click SR-001 Tax Invoice -> set Print Report Footer = Print Graphic Report Footer**.



BARRYS POINT VET CLINIC
21 Barrys Point Road | Takapuna | Auckland
Phone: 09 489 2280 | Fax: 09 489 2290
www.vetlinksq1.com

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland.
Ph: (09) 489-2280

CREDITED BILL (DUPLICATE)

Date: 26/08/2020
Mr. Joe Bloggs
21 Barrys Point Road
Auckland 0622

Invoice No: 1/972
Account No: 1/1072
GST Number 111-222-333
Till: 1

Description	Staff	Qty	TAX	Price
Orijen Adult Dog Food (11.4kg)	DC	1		184.43
Sub Total				184.43
Total				184.43
Including Tax (10.00%)				16.77

PAYMENTS:

Charge	185.00
Rounding Adj.	-0.57

Your current balance is 370.00, credit available is 305.00

Option 1: DIRECT CREDIT
Acc Name: Barrys point Vet
BSB: 123-456
Acc No: 09 123456 78 00

Option 2: ☐ Visa ☐ MasterCard
Name on card: _____
Card Number: _____
Signature: _____ \$ _____
Exp. Date: ____/____ CVN: _____

Option 3: CHEQUE PAYABLE TO
Barrys Point Vet
21 Barrys Point Road
Takapuna

Please use this as the payment reference number: 1/1072

Printed: 27/08/2020 Page: 1



Animal History Printout


The Animal History printout report has been reformatted to have a;

- Cleaner and simpler look
- Fit more on a page
- Easily identify and follow dates in reverse chronological order
- Have name of the patient in big and bold to find it easily
- Have all phone numbers clearly visible
- Barcode reformatted to scan and look up quickly in VetLinkSQL.

This history form can be printed from either;

- **Clinical History -> print icon -> Animal History...**
- **Animal record -> Print Icon -> Animal History...**
- **Appointment -> right click -> Print History....**

Note: The printout from the **History Browser** has not changed and remains the same as previous versions.

Barrys Point Vet Clinic 21 Barrys Point Road. Takapuna. Auckland. Ph: (09) 489-2280 www.vetlinksql.com		 Anm No: 1/51969
Patient Clinical History (A4) 6 Animal History (All)		
Horsey (1/51969) Horse, Male, Clydesdale, Gray Age: 6 Yrs 3 Mths, Desexed: Y on:		
John Bravecto (1/20133) 21 Barrys Point Road Takapuna Auckland 0622		
09-4892280 (W) 09-4892280 (H) 02112345678 (M) 09-4892290 (F)		
21/11/2019 - 21/11/2019 (1 Days)		INV 1/629167
Date: 21/11/2019	VET: SN	Summary:
Major Problem:		
HISTORY This is using a free format form where there are no headings like History, Clinical Exam, etc. Just testing to see if this form will make the reading better in reports, etc		
Drugs & Materials Used		
12.00 Clavaseptin Tablets 50mg Give ONE tablet twice a day until course completed. Always give with or after food. Stop treating if any signs of gastrointestinal disturbance develop and contact the clinic. 1.00 Hospitalisation - Stable Horse		
31/10/2019 - 31/10/2019 (1 Days)		INV 1/629121
Date: 31/10/2019	VET: AP	Summary: No Summary
Major Problem:		
HISTORY Retake pictures of sarcoid, discuss ongoing left hind issues. was improving post injection, had a week of lameness, responded to bute, discuss need for repeat si injection and ongoing physio.		
29/10/2019 - 29/10/2019 (1 Days)		INV 1/629120
Date: 29/10/2019	VET: BW	Summary: Pictures
Major Problem:		
HISTORY Take pictures of sarcoid CLIN_EXAM Doing well with treatment, sedated to clean and take photos Quite sore when cleaning so adv. bute today and poss tomorrow. Will await update from referral. COMMENTS 30/10/19 - left message - sarcoid plan: leave for 2w and repeat examination, may need to surgically remove any small aspects if needed.		
Drugs & Materials Used		
1.00 Butorphanol 10mg 20ml		

Client Balances Credit Available

The client balances reports have been updated to show any credit available on client accounts and also has a filter to show only records with credit.

Only in Credit

Company

C. Batch Code

CFL Test Database
 21 Barry's Point Road, Takapuna, Auckland.
 Ph: (09) 489-2280

Client Balances

Company = MAIN

Client Name	Num Phone	Current	1 Mth	2 Mth	3 Mth +	Total Owing	Credit Available	ID Offered
Cannon James	1/1014	540.00	150.00	150.00	570.00	1,410.00	0.00	
Cmo Stock	1/1010	0.00	15.00	67.74	198.91	281.65	0.00	
Daly Kieran	1/1051	0.00	0.00	0.00	0.00	0.00	656.80	
Doe John	1/1004	0.00	0.00	0.00	0.00	0.00	41.80	
Hupta Rohan	1/1056	0.00	15.00	15.00	423.30	453.30	0.00	
Jake Rauler	1/1044	0.00	0.00	0.00	584.65	584.65	0.00	
Little Man Stud	1/1009	0.00	15.00	37.80	87.69	140.29	0.00	
Porter James	1/1038	0.00	0.00	0.00	0.00	0.00	1,000.00	
Read Joseph	1/1085	0.00	27.00	0.00	0.00	27.00	0.00	
Small Farms Limited	1/1001	0.00	0.00	0.00	0.00	0.00	275.00	
Test Example	1/1047	195.00	0.00	-80.00	0.00	115.00	0.00	
Walker Jameson	1/1057	0.00	15.00	15.00	280.00	310.00	0.00	
Total Items Printed: 12		735.00	237.00	205.34	2,144.55	3,321.89	1,973.40	

Provisional Debtors List report
 Final Debtors List at EOM with Control Report with Explanations

Export for Auditing

A new option in the Export/Spreadsheet will allow you to export all Bill, Order, Invoice and Payment transactions. It will include all non-customer and non-financial bills. This has been added so users can verify what all transaction numbers have been issued for.

To use, Set Audit to Yes. Then it will give all records for Bills, Invoices, Orders and payments, including. Note that all selection boxes except for dates will be disabled. [BS9691]

Name
 Status
 Profile

Category
 Preview
 Reserved

Printer
 Shared
 Custom Props

Print Logo
 Top Margin
 Bottom Margin

Left Margin

Table Link

Use Following Tables

☒ Clients
 ☐ Reminders
 ☐ Supplier
 ☐ Referral

☐ Client Address
 ☒ Bills
 ☐ Orders
 ☐ Referral Staff

☐ Client Contact
 ☐ Bill Items
 ☐ Inw Goods
 ☐ Referral Clinic

☐ Cln Acct Details
 ☐ Products
 ☐ Payments
 ☐ Referral Address

☐ Animals
 ☐ History
 ☐ Referral Contact

Special Filters

Audit

One Entry per

Client Group

Bill Type

Complex Item

Control Report Changes

Account payment in the control report are now separated in Payments/credits applied to invoices and Unallocated Credit.

MONTHLY Debtors Control Report			
MONTH starting 1/03/2020 for CFL Helpdesk Test DB			
Class	Costs (Exc.)	Sales (Exc.)	Sales (Inc.)
Bonus Point	0.00	0.00	0.00
Drug	1.50	2.55	2.81
Fee	0.00	13.64	15.00
Finance	0.00	0.00	0.00
Material	0.00	0.00	0.00
Retail	176.26	318.56	350.42
Service	0.00	109.12	120.00
Total	177.76	443.87	488.23(Nett Sales)
The following figures are tax inclusive:			
DEBTORS			
Cash	388.00		
Cheque	0.00		
Credit Card	0.00		
Direct Credit	0.00		
Direct Debit	0.00		
Eftpos	0.00		
External Payments	0.00		
Farmlands Card	0.00		
Import Payments	0.00		
Vetpay	0.00		
Total Takings	388.00		
Less Acct Payment	-222.00		
Charge	323.00		
Ext. Voucher	0.00		
Rounding Adj.	-0.77		
Voucher	0.00		
Less Voucher Sold	0.00		
Nett Sales	488.23		
Credit Debtors W/O	0.00		
Journal Ent.	0.00		
Less Bad Debt Debtors W/O	0.00		
Nett Income	488.23		
Opening Debtors	4,383.89		
Less Payments/Credit Applied	-222.00		
Charges Applied	323.00		
Journal Ent.	0.00		
Less Bad Debt Debtors W/O	0.00		
Variances	0.00		
Closing Debtors	4,484.89		
Unallocated Credit	1,973.40		
Invoice Based Tax	44.38		
Cash Based Tax	0.00		
Based on GST Rate @15%			
INCENTIVE DISCOUNT			
ID Offered Last Month	0.00		
ID Offered This Month	0.00		
ID Taken This Month	0.00		

Animal by Category Report

The Animal by Category report has had two new filters options added to it so you can group species into animal categories. Categories may include Small Animal, Large Animal or Equine. The new filters are;

- **By Patient Catg:** Selecting "Yes" will now provide a report with Patient Category Totals as columns, instead of every species.
- **Detail By Prd:** Selecting "No" will report all Product & Service Categories as rows, instead of every product & service.

Note: To group species into Animal Categories;

1. Create the animal categories in **Options -> Picklists Setup -> Category 1 or 2 or 3 -> add category name.**
2. Add the appropriate category to each animal profile so new animals are created with the correct category. To do this go to **Options -> Picklists Setup -> Animal -> Profile -> select animal profile -> set category as needed.**
3. For existing animals you also need to set the category. This can be done one at a time by opening the animal record then under the more tab setting the correct category. You can also contact the VetlinkSQL helpdesk to set this in bulk.

Animal By Category					
Patient Catg Detailed Company = MAIN Site = VI2Test Store = Master From 9/08/2020 AnmCat 1 Figures are Sal					
	No Patient	Equine	Large Anm	Small Anm	Total
Antib Inject	0.00	0.00	30.40	41.17	71.57
Bovine Fee	0.00	0.00	20.00	20.00	40.00
Consultation	0.00	319.08	371.46	1,365.98	2,056.52
Default	1,078.51	0.00	886.00	1,237.61	3,202.12
Labs	0.00	0.00	0.00	118.18	118.18
Parasite	273.01	0.00	0.00	237.90	510.91
Pet Food	1,508.98	0.00	167.66	17,384.80	19,061.44
Total	2,860.50	319.08	1,475.52	20,405.64	25,060.74

Sales by Animal Type Report

The Sales by Animal Type report has had a new filters options added to it so you can group species into animal categories. Categories may include Small Animal, Large Animal or Equine. The new filter is;

- **By Patient Catg:** Selecting "Yes" will now provide Patient Categories as rows instead of every animal type (species).

See note in the Animal by Category Report section above for details on setting the animal categories.

Sales By Animal Type								
By Patient Catg Company = MAIN Site = VI2Test Store = Master From 9/08/2020 AnmCat 1								
Category	Service	Retail	Materials	Drugs	Fees	Finance	Other	Total
No Patient	# 1	2	0	1	1	0	0	2
	\$ 259.17	1,781.99	0.00	807.83	11.51	0.00	0.00	2,860.50
	/ 259.17	891.00	0.00	807.83	11.51	0.00	0.00	1,430.25
Equine	# 2	0	0	0	0	0	0	2
	\$ 319.08	0.00	0.00	0.00	0.00	0.00	0.00	319.08
	/ 159.54	0.00	0.00	0.00	0.00	0.00	0.00	159.54
Large Anm	# 2	2	1	2	2	0	1	2
	\$ 953.62	173.21	108.45	195.73	50.69	0.00	-8.18	1,475.52
	/ 476.81	86.61	108.45	97.87	25.35	0.00	-8.18	737.76
Small Anm	# 13	5	6	10	6	0	0	16
	\$ 2,196.10	17,663.61	161.33	271.21	113.39	0.00	0.00	20,405.64
	/ 168.93	3,532.72	26.89	27.12	18.90	0.00	0.00	1,275.35
Totals	# 18	9	7	13	9	0	1	22
	\$ 3,727.97	19,618.81	269.78	1,274.77	175.59	0.00	-6.18	25,060.74
	/ 207.11	2,179.87	38.54	98.06	19.51	0.00	-6.18	1,139.12

Fixes and Tweaks

Export/Spreadsheets Function: Was not fetching new data if the filter was changed without closing the form. This has now been resolved. [BS9598]

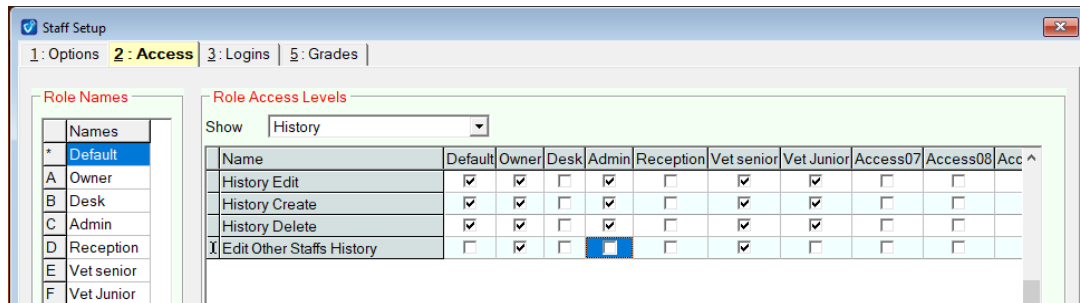
Herd Size Mail-Merge Variable and Filter: Herd Size can now be mail merged and used in the mailer filters [BS4810, 4824]

Tax Analysis By Bill report Branch filter: A branch filter has been added to the tax analysis by bill report.

Document Manager / Clinical Notes

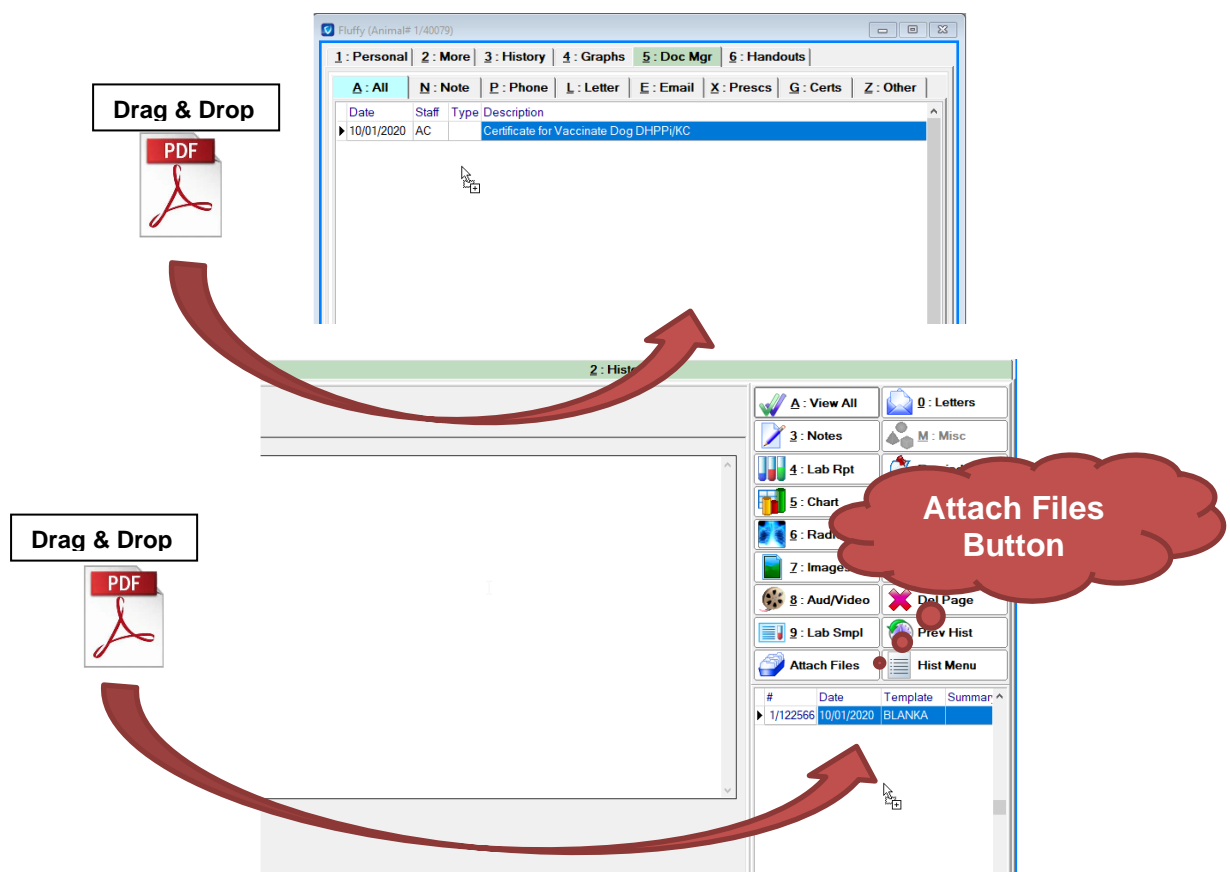
History Access Levels

The history access levels have now been enabled. These were not enabled in previous versions. To check your settings for these please go to in **Options -> Setup -> Staff -> Access -> change category to History -> enable access for levels as required.**



Drag and Drop in Clinical Notes/ Doc Manager

Files can now be dragged and dropped into the clinical history and document manager. Just left click and hold on an item from your desktop and drag to document manager or the history summary grid in clinical history. [BS8541].



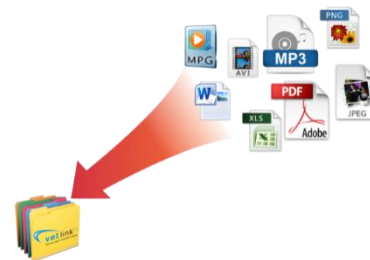
Attach Files Button in Clinical Notes

To make attaching files to VetlinkSQL easier a new **Attach Files** button has been added to the clinical history page. Just click the **Attach Files** button and then browse to the location of the file you want to attach.

Files 2 Server Service (AWS)

A new Files2Server service has been created to make it easier to input files from your local "Windows" pc into VetlinkSQL in the Cloud.

Previously to copy a file from your local desktop to your Cloud version of VetlinkSQL you would have to copy paste from your desktop to the cloud desktop, then copy again into the VL2 attach folder or search for the file from VetlinkSQL.



The Files2Server service works as an extension of the VL2Attach folder onto your local desktop. So once the service is installed, if you place a file into your designated local folder with a specific name, it will copy the file to VL2Attach folder on your cloud server, then based on the filename name VetlinkSQL will import from the VL2attach folder to a record in VetlinkSQL.

The most commonly used filename used for the VL2attach folder are;

- **C+Client Number / eg C1234:** The file will get imported to the client document manager.
- **A+animal Number / eg A1234:** The file will get imported to the animal document manager.
- **H+Animal Number / H1234:** The file will get import to the last open bill for that animal. If no open bill exists a new bill will be created.

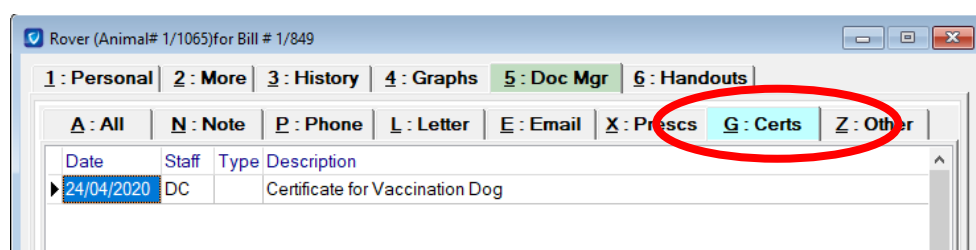
Examples of files to server use;

- Attachments in email. E.g. If you receive an email attachment you can save the file to your files2server folder on your local computer with one of the filenames above -> the file then get automatically transferred to the cloud server -> then based on the filename, it gets automatically linked to an client, animal or clinical record.
- Xray Machine. E.g. If you xray machine can export images a filename as above you can save the images to your files2server folder on your local -> the image then gets automatically transferred to the cloud server -> then based on the image name, it gets automatically linked to an client, animal or clinical record.

Please contact the software support desk to set this up.

Handouts/Certificates in Doc Manager

Certificates and Handouts added at billing will now automatically show in the **Document Manager tab** as well as the **6:Handouts tab**. Within the Document Manager tab another tab called **G: Certs** has been added as well.



Fixes and Tweaks

Document Manager: will now work with the proper access control.

Document Manager: Drop down list in the document manager will now exclude inactive staff. [BS7339].

Copy History: Copying the last history from clinical notes now works again.

Misc.

VetLinkSQL Background

The VetLinkSQL background has now been replaced with a service so you will no longer need to make sure the background application is running. As it's a service you won't see any application either, it will just start up automatically with the computer and will be hidden on the server.

Note: The ebiz background (for ordering / invoicing with suppliers) has also been changed to a service.

Provet Connect Migration



Versions prior to version 6 used Provet's e-order application to send orders and download invoices. Due to Provet moving away from using this app to Provet connect, VetlinkSQL will now link to Provet Connect only from version 6, integration with e-order will be discontinued.

To move to the Provet Connect integration you just need a Provet connect account from which Provet IT support can generate an authentication token. This token just needs to be emailed to VetlinkSQL so we can set up the VetlinkSQL side. Once done the integration works much the same apart from when you finish the order in VetlinkSQL, it now sends the order to Provet Connect which you will need to log in to finalise.

Product Name Length Increased

The Product Name and Printed Name has been extended from 33 to 60 characters. The product names will show fully on Tax Invoices/Receipts and Statements. For some reports, including drug labels, the full 60 characters cannot be displayed due to space constraints. Drug labels for example will only show the first 47 characters of the product name.

Product Search "Contains"

In the advanced product search screen, the contains options now remembers the last setting. So, if you prefer to do searches with contains enabled then it will remember this setting.

Contains is a word within a word search. So, if the product name was "Hills Feline Prescription Diet 2kg" and you wanted to search for it;

- With contains unticked and you searched for "Prescription Diet" the item would not come up as it only searches for the start of the name.
- With contains ticked and you searched for "Prescription Diet" it would find the item.

Search Product for Viewing/maintenance	
Number	
Name	PRESCRIPTION <input checked="" type="checkbox"/> Contains
Soundex	
User Code	
Sup Code	
Class	All
Complex Type	All
Notes	<input type="checkbox"/> Any word
Category 1	
Category 2	
Category 3	
Category 4	
Category 5	
Status	Active
Products with Invalid GL	<input type="checkbox"/>
Only Ann Type Products	<input type="checkbox"/>

Database Prefix

The database prefix can now be removed from the front of client/animal / product number. For example, client numbers currently show as 1/1234, in version 6.0 by disabling this option they will just show as 1234. To disable the prefix go to **Options -> Setup -> Misc -> untick Use site number in References**

Dictionary

A Dictionary / Spell Check engine is provided with the following features;

- A new **Spell** menu is visible from the top menu bar in VetLinkSQL.
- It works on forms such as clinical notes, word processor, doc manager and intelligent notes.
- The spell check will automatically underline misspelled words. A manual spell check can also be done by right clicking a word and selecting **spelling**.
- The dictionary is user based so each user can have their own settings.
- By default the British Dictionary and Thesaurus are active (except for USA and Canada). The medical/veterinary dictionary is also active by default.
- Additional dictionaries are supplied and can be configured from the **Spell menu | Configure | Language tab** ...e.g. Legal words, technical etc....

Fixes and Tweaks

Application Shutdown Prompt: When the program closes because of Maintenance, the information / countdown form is no longer modal. This means that you can still do something for 2 min.

Background: An error reported on processing No Show appointments for staff with long names has been addressed. [BS8568]

Picklist Category: Now allows deletion of unused categories. [BS4130, 5778, 2103]

Staff Record Print Label Menu: Now prints Address Label for staff. [BS9595]

Animal Chip ID: Is now stored without spaces so that they are found while searching animal by Chip ID [BS9542].

Animal/Client Edit: Will not validate data entry fields if the record is inactive [BS7499].

Animal Age: When an animal is marked as deceased the age will now not increase any further.

Product: Will show stores for all companies now [BS9518].

Stock Adjust: Recalculates the variance when store is changed [BS9566].

History Browser:

- Will show the animal gender border colour [BS8633].
- The default search for bringing up previous history is now for 12 months [BS8633].

Creditors Invoice: Will no longer give an error message when adding a new downloaded product from creditors module [BS9601].

Order Email: Attachments for emailed orders are now retained correctly [BS9636]

Purchase Rewards:

- Name increased to 30 chars [BS8535].
- Will release the redeemed items when the bill is cancelled. [BS9522].

Loyalty Fixes: Screen optimised to report better usage. [BS9328]

Emailing: Images can now be drag and dropped into the email editor and will send correctly. [BS9987]



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END OF UPDATE NOTES

Appendix 1 – Invoice Based Payments

Separate Owing and Credit Balances

With invoice based payments, account payments can be allocated to a bill to reduce the amount owing. If the payment is not allocated to a bill, e.g. a deposit or a refund that is credited to the account, then the credited amount will show separately next to the amount owing. This is so you can see the unallocated credit available that can be assigned to an owing invoice. Generally you would assign the credit immediately if any invoices are still owing.


Doc Mgr | 8 : Contacts

3 Mth +	\$0.00	Future Bills:	...
2 Mth	\$0.00	\$0.00	
1 Mth	\$0.00	Credit	...
Current	\$79.00	\$75.00	
Total	\$79.00		...
Open	\$0.00		...
Batched	\$0.00		...
Total	\$79.00		

Amount Due on Invoices

With invoice based payments a new **Due** total has been added to invoices in the bottom right hand corner. The **Due** field will show the amount still outstanding in this invoice. When account payment are done amounts can be allocated against the invoices to pay them off. As amounts are allocated the **Due** amount will then reduce.

 Bloggs Joe
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Inv Num # 1/627960
Rqst Staff
Last Staff *SUP*

Tax Invoice

Owes \$145.20

Sequence No. 6284

All

1 : Bill				2 : History									
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	R	10	Hills Cat S/D 156gm	\$34.00		\$34.00					0	0

Account Status
ClnUpdtd
31/12/2019 3:53:36 PM
Inventory Status
StkUpdtd
31/12/2019 3:53:36 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$34.00	1/682726		31/12/2019

STotal	\$29.56
GST	\$4.44
Total	\$34.00
Due	\$34.00

Client Bills Still Due

A new filter has been added to the client record under the **History** tab called **Only Due**. This filter will let you quickly find the bills that are still owing.

Cumin Tegan (Client # 1/1003)

1 : General | 2 : More | 3 : Marketing | 4 : Financial | 5 : Info | 6 : History | 7 : Doc Mgr | 8 : Contacts

8 : Bills | 9 : Transactions | 0 : Quotes

Date Range ☒ 27/08/2017 ☐ 27/08/2020 Bill Type **D : Only Due** F12 : Search


Num	Type	Inv_Date	Dis_Date	Acc_State	Inv	x2	Total	Complaint	Dis_Ti
# 1/923	FEE	31/07/2020	31/07/2020	Aged	St	0	\$5.00		14:47
# 1/922	FEE	30/06/2020	30/06/2020	Aged	St	0	\$10.00		14:47
# 1/818	INV	8/07/2020	1/06/2020	Aged	St	0	\$165.99		22:24
# 1/746	INV	8/07/2020	1/06/2020	Aged	St	0	\$54.51		22:24
# 1/723	INV	8/07/2020	1/06/2020	Aged	St	0	\$22.49		22:24
# 1/719	INV	8/07/2020	1/06/2020	Aged	StkUpdt	0.24	\$0.26		22:25
# 1/667	INV	8/07/2020	1/06/2020	Aged	StkUpdt	118.18	\$130.00		22:25
# 1/632	INV	8/07/2020	1/06/2020	Aged	StkUpdt	59.09	\$65.00	Consultation	22:23

Bill Type dropdown menu:

- A : All
- F : Future Bills
- R : Refunds
- B : Open Batched Bills
- U : Unfinished
- I : Account Fee/Interest
- D : Only Due**

Client Balances Credit Available

The client balances reports have been updated to show any credit available on client accounts and also has a filter to show only records with credit.


Only in Credit 

Company

C. Batch Code

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland.
Ph: (09) 489-2280

Client Balances
Company = MAIN




Client Name	Num Phone	Current	1 Mth	2 Mth	3 Mth +	Total Owing	Credit Available	ID Offered
Cannon James	1/1014	540.00	150.00	150.00	570.00	1,410.00	0.00	
Cmo Stook	1/1010	0.00	15.00	87.74	198.91	281.65	0.00	
Daly Kieran	1/1051	0.00	0.00	0.00	0.00	0.00	656.60	
Doe John	1/1004	0.00	0.00	0.00	0.00	0.00	41.80	
Hupta Rohan	1/1056	0.00	15.00	15.00	423.30	453.30	0.00	
Jake Rauler	1/1044	0.00	0.00	0.00	584.65	584.65	0.00	
Little Man Stud	1/1009	0.00	15.00	37.80	87.69	140.29	0.00	
Porter James	1/1038	0.00	0.00	0.00	0.00	0.00	1,000.00	
Read Joseph	1/1085	0.00	27.00	0.00	0.00	27.00	0.00	
Small Farms Limited	1/1001	0.00	0.00	0.00	0.00	0.00	275.00	
Test Example	1/1047	195.00	0.00	-80.00	0.00	115.00	0.00	
Walker Jameson	1/1057	0.00	15.00	15.00	280.00	310.00	0.00	
Total Items Printed: 12		735.00	237.00	205.34	2,144.55	3,321.89	1,973.40	

Provisional Debtors List report
Final Debtors List at EOM with Control Report with Explanations

Allocating Payments to Invoices

When an account payment is done and the payment window open a list of all unpaid bills will be shown. You can then distribute the payment to the correct bill/s. By default the payment will be automatically applied to the oldest invoices but you can change if necessary.

1. Check for a bill still unpaid. The Due section in bottom right hand corner will show you if it is still due.
2. Open the account payment from the bill, client record or special functions the same way as in previous versions.
3. In the **Amount to Pay** field, enter the amount the client is paying.
4. Below the **Amount to Pay** field is a table that will list all unpaid bills charged to the client if any exist. This list will be in chronological order from oldest to latest, top to bottom. You can allocate the **Account Payment** to any of these bills now or clear out the **Allocation** column on the bills to assign the credit later.
5. Once done, click **F12: Accept**.
6. Select **F12 Payment** to finish the payment as done in previous versions.
7. Select the payment method and click **F12: Finish**.
8. A new bill will be created to record the payment. A message in the items will show which invoice the payment was allocated to.
9. The invoice the credit was applied to will have a payment added in the payment section to show which invoice the payment was from as well as reducing the amount still due.



Bloggs Joe
 21 Barrys Point Road
 Takapuna
 Auckland 0622
 EXISTING CLIENT

Inv Num # 1/627960
 Rqst Staff
 Last Staff *SUP*
Tax Invoice
 Sequence No. 6284

Owes \$145.20

All

1 : Bill				2 : History									
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item_Scripts
1	AC	R	10	Hills Cat S/D 156gm	\$34.00		\$34.00					0	0

Account Status
 ClnUpdtd
 31/12/2019 3:53:36 PM
 Inventory Status
 StkUpdtd
 31/12/2019 3:53:36 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$34.00	1/682726		31/12/2019

STotal \$29.56
 GST \$4.44

 Total \$34.00
Due \$34.00

Charged bill with amount still due

Account Payment for Bloggs Joe
Incentive Discount Expired on 10/12

3 Mth +	\$0.00	Owed On Last Statement	\$0.00
2 Mth	\$0.00	Charged Since	\$145.20
1 Mth	\$0.00	Paid Since	\$0.00
Current	\$145.20	Incentive Disc Pending	\$0.00
Total Owning	\$145.20		

Payment to Apply	\$34.00
Incentive Discount	\$0.00
Amount to Pay	\$34.00

Date	Bill#	Total	Due	Allocation
31/12/2019	1/627959	\$50.00	\$50.00	\$0.00
31/12/2019	1/627960	\$34.00	\$34.00	\$34.00
31/12/2019	1/627961	\$61.20	\$61.20	\$0.00

Amount Unallocated: \$0.00 Amount Allocated: \$34.00

✓ F12 : Accept ✗ ESC : Cancel

Account Payment Screen to allocate payment to Invoices

Bloggs Joe
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Inv Num # 1/627963
Rqst Staff
Last Staff *SUP*

Tax Receipt
Sequence No. 6284

Owes \$111.20

All

1 : Bill										2 : History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	AP		Payment for Invoice# 1/627960	\$34.00		\$34.00					0	0

TypeS	Amount	Pmt#	Reference	Date
Cash	\$34.00	1/682728		31/12/2019

STotal	\$34.00
GST	\$0.00
Total	\$34.00
Due	\$0.00

Payment Invoice with item detail showing which invoice it was applied to

Bloggs Joe
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Inv Num # 1/627960
Rqst Staff
Last Staff *SUP*

Tax Invoice
Sequence No. 6284

Owes \$111.20

All

1 : Bill										2 : History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	R	10	Hills Cat S/D 156gm	\$34.00		\$34.00					0	0

TypeS	Amount	Pmt#	Reference	Date
Charge	\$34.00	1/682726		31/12/2019
Payment	\$34.00	1/682729	On Bill# 1/627963	31/12/2019

STotal	\$29.56
GST	\$4.44
Total	\$34.00
Due	\$0.00

Original charged invoice with Payment showing in Payment section and Sue amount now set to \$0

Refunding to Account / Charge

When doing a refund for a client and crediting the account, the credit will now appear in a separate credit section next to the amount owing, the amount owing will not change. You can then use the credit to pay a future bill or you can apply the credit against an existing owing invoice. This section shows how to apply the credit against an existing owing invoice.

1. Do the client refund to the Account/Charge the same as in previous versions and the refund invoice will be created.
2. Once refund is done you will see the amount owing on the client record is still the same but a new section for available credit will now show.
3. To apply the credit to an existing invoice that is owing click the button next to the balance and choose **Allocate Credit**.
4. The allocate credit screen will appear, apply the credit to one or more of the existing invoices.
5. A new bill will be created to show where the credit was applied to.
6. The invoice the credit was applied to will have a payment added in the payment section to show which invoice the payment was from as well as reducing the amount still due.
7. On the Client Record the Credit amount should now be adjusted to reflect the credit that was used.

Bloggs Joe
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Inv Num # 1/627964
Rqst Staff
Last Staff *SUP*
Refund Bill
Sequence No. 6284

Owes \$111.20

Alt

1 : Bill 2 : History

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	R	10	Hills Dog KD Stew 159g	\$37.00		\$37.00					0	0

Account Status
ClnUpdtd
31/12/2019 4:07:28 PM
Inventory Status
StkUpdtd
31/12/2019 4:07:28 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$37.00	1/682730		31/12/2019

STotal \$32.17
GST \$4.83
Total \$37.00
Due \$0.00

Refund bill with credit added to account

Doc Mgr 8 : Contacts

Bloggs Joe

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$111.20
Total \$111.20

Future Bills: \$0.00

Credit \$37.00

Open \$79.00
Batched \$0.00
Total \$190.20

Allocate Credit
Make Credit Refund

Client record showing the credit separately to balance owing
Option to allocate credit to unpaid bills

Allocate Credit for Bloggs Joe

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$111.20
Total Owing \$111.20

Owed On Last Statement \$0.00
Charged Since \$145.20
Paid Since -\$34.00

Credit To Apply \$37.00

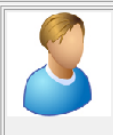
Date	Bill#	Total	Due	Allocation
31/12/2019	1/627959	\$50.00	\$50.00	\$37.00
31/12/2019	1/627961	\$61.20	\$61.20	\$0.00

Clear Allocation

Credit Remaining \$0.00
Credit Applied \$37.00

✓ F12 : Accept ✗ ESC : Cancel

Allocation of Credit to unpaid invoices



Bloggs Joe
 21 Barrys Point Road
 Takapuna
 Auckland 0622
 EXISTING CLIENT

Inv Num # 1/627966
 Rqst Staff

Tax Receipt
 Sequence No. 6284

Owes \$153.20

All


1 - Bill										2 - History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	*SUP	AP		Payment for Invoice# 1/627959	\$37.00		\$37.00					0	0
2	*SUP	AP		Credit Applied	-\$37.00		-\$37.00					0	0

Account Status
 ClnUpdtd
 31/12/2019 4:13:59 PM
 Inventory Status
 StkUpdtd
 31/12/2019 4:13:59 PM

TypeS	Amount	Pmt#	Reference	Date

STotal \$0.00
 GST \$0.00
 Total \$0.00
 Due \$0.00

Invoice to record where credit was allocated



Bloggs Joe
 21 Barrys Point Road
 Takapuna
 Auckland 0622
 ** NEW CLIENT **

Inv Num # 1/627959
 Rqst Staff

Last Staff *SUP*
Tax Invoice
 Sequence No. 6284

Owes \$153.20

All

1 : Bill										2 : History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	S	1	Consultation (C)	\$50.00		\$50.00					0	0

Account Status
 ClnUpdtd
 31/12/2019 3:53:12 PM
 Inventory Status
 StkUpdtd
 31/12/2019 3:53:12 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$50.00	1/682725		31/12/2019
Payment	\$37.00	1/682731	On Bill# 1/627966	31/12/2019

STotal \$43.48
 GST \$6.52
 Total \$50.00
 Due \$13.00

Original charged invoice with Payment showing in Payment section and Due amount now reduced

Making a Deposit / Credit to the Clients Account

1. Open the account payment from the bill, client record or special functions the same way as in previous versions.
2. In the **Amount to Pay** field, enter the amount the client is paying for the deposit.
3. If required, remove payments that have been incorrectly added to an existing bill, so that the Amount Unallocated at the bottom on the screen is the total of the deposit.
4. Once done, click **F12: Accept**.
5. Take payment and finish the bill as normal.
6. A bill with an Unallocated Payment item will be created
7. In the client record the credit will be added to a new credit section to the left of the owing balance.

Account Payment for Smith Bailey
Incentive Discount Expired on 10/12

3 Mth +	\$0.00	Owed On Last Statement	\$0.00
2 Mth	\$0.00	Charged Since	\$0.00
1 Mth	\$0.00	Paid Since	\$0.00
Current	\$0.00	Incentive Disc Pending	\$0.00
Total Owing	\$0.00		


Payment to Apply: \$100.00
Incentive Discount: \$0.00
Amount to Pay: \$100.00

Date	Bill#	Total	Due	Allocation

Amount Unallocated: **\$100.00** Amount Allocated: \$0.00

F12: Accept **ESC: Cancel**


Doc Mgr | 8 : Contacts



3 Mth +	\$0.00	Future Bills:	---
2 Mth	\$0.00		\$0.00
1 Mth	\$0.00	Credit	---
Current	\$0.00	\$100.00	---
Total	\$0.00		---
Open	\$0.00		---
Batched	\$0.00		---
Total	\$0.00		---

Payment screen when making a deposit. The Amount unallocated should be amount of deposit

Credit will be showed separately to total owing

 **Smith Nigel**
21 Barrys Point Road
Takapuna
Auckland 1234
** NEW CLIENT **

Inv Num: # 1/627956
Rqst Staff:
Last Staff: *SUP*
Tax Receipt
Sequence No. 6284

1 : Bill **2 : History**

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item_Scripts
1	AC	AP		Unallocated Payment	\$100.00		\$100.00					0	0

Account Status: ClnUpdtd 31/12/2019 3:33:51 PM
Inventory Status: StkUpdtd 31/12/2019 3:33:51 PM

TypeS	Amount	Pmt#	Reference	Date
Cash	\$100.00	1/682722		31/12/2019


STotal: \$100.00
GST: \$0.00
Total: \$100.00
Due: \$0.00

An invoice with an un-allocated payment will be created to show the deposit

Using Credit / Deposit for a New Bill

1. If the client has credit on their account it will show as a separate credit section on the client record. It won't be included in the owing balance.
2. To use the credit enable setup option in **Options -> Setup -> Billing -> 1: Master/Branch -> tick Prompt When Client Balance in Credit**
3. Make a new bill as normal
4. When selecting payment a prompt will ask whether you wish to use the credit. Select Yes.
5. Finish the Payment / Bill.
6. Upon finishing the bill another bill will be created. This will be for \$0 but will have message lines to show Credit was used and which bill it was used on.
7. On the bill you used the credit on you will see a Charge/To Account line as well as a line detailing a payment has been applied. The Due amount should now show \$0.
8. On the Client Record the Credit amount should now be adjusted to reflect the credit that was used.

Doc Mgr | 8 : Contacts |



3 Mth +	\$0.00	Future Bills:	...
2 Mth	\$0.00		\$0.00
1 Mth	\$0.00	Credit:	...
Current	\$0.00		\$100.00
Total	\$0.00		...
Open	\$0.00		...
Batched	\$0.00		...
Total	\$0.00		...

Credit showing separately to total owed

Confirm

?

Your Account is in credit of \$100.00
do you want to use it up?

Yes No

Message at payment asking to use credit

Smith Nigel
21 Barrys Point Road
Takapuna
Auckland 1234
EXISTING CLIENT

Inv Num # 1/627958
Rqst Staff

Tax Invoice
Sequence No. 6284

All

1 : Bill										2 : History			
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	AP		Payment for Invoice# 1/627957	\$90.00		\$90.00					0	0
2	AC	AP		Credit Applied	-\$90.00		-\$90.00					0	0

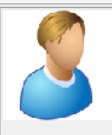
Account Status
ClnUpdtd
31/12/2019 3:45:55 PM

Inventory Status
StkUpdtd
31/12/2019 3:45:55 PM

TypeS	Amount	Pmt#	Reference	Date

STotal \$0.00
GST \$0.00
Total \$0.00
Due \$0.00

Invoice created to show credit has been used and which invoice it was used on



Smith Nigel
 21 Barrys Point Road
 Takapuna
 Auckland 1234
 EXISTING CLIENT

Inv Num # 1/627957
 Rqst Staff
 Last Staff *SUP*
Tax Invoice
 Sequence No. 6284

All

1 : Bill

2 : History

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts
1	AC	S	1	Consultation (C)	\$90.00		\$90.00					0	0


Account Status
 ClnUpdtd
 31/12/2019 3:45:18 PM
 Inventory Status
 StkUpdtd
 31/12/2019 3:45:18 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	\$90.00	1/682723		31/12/2019
Payment	\$90.00	1/682724	On Bill# 1/627958	31/12/2019

STotal \$78.26
 GST \$11.74
 Total \$90.00
 Due \$0.00

Invoice which credit was used on with Due amount reduced and note in payment section to show how it was paid

Doc Mgr | 8 : Contacts



3 Mth +	\$0.00	Future Bills: ...
2 Mth	\$0.00	\$0.00
1 Mth	\$0.00	Credit
Current	\$0.00	\$10.00
Total	\$0.00	...
Open	\$0.00	...
Batched	\$0.00	...
Total	\$0.00	

Credit balance reduced by amount of credit used

Refunding Credit on Account

Returning credit on the account to the client is much the same as previous versions.

1. If the client has credit on their account it will show as a separate credit section on the client record. It won't be included in the owing balance.
2. Select **Make Credit Refund** from the menu next to the credit amount
3. A window will appear where you can enter the amount to refund to the client.
4. Finish the refund with payment method as normal.
5. A bill with an Unallocated Payment item will be created.
6. The credit balance on the client record should now be adjusted by the amount refunded.

Doc Mgr | 8: Contacts

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$0.00
Total \$0.00

Future Bills: \$0.00

Open \$0.00
Batched \$0.00
Total \$0.00

Credit: \$10.00

Allocate Credit
Make Credit Refund

Account Payment for Smith Nigel

3 Mth + \$0.00
2 Mth \$0.00
1 Mth \$0.00
Current \$0.00
Total Owing \$0.00

Owed On Last Statement \$0.00
Charged Since \$90.00
Paid Since -\$100.00

Enter the Credit Refund Amount 10.00

F12: Accept ESC: Cancel

Make Credit Refund available from client record next to balance

Amount for credit refund can be entered on payment screen

Smith Nigel
21 Barrys Point Road
Takapuna
Auckland 1234
EXISTING CLIENT

Inv Num # 1/627967
Rqst Staff
Last Staff |SUP*|

Refund Bill
Sequence No. 6284

1: Bill 2: History

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item_Scripts
1	AC	AP		Unallocated Payment	\$10.00		\$10.00					0	0

Account Status
ClnUpdtd
31/12/2019 4:19:00 PM

Inventory Status
StkUpdtd
31/12/2019 4:19:00 PM

TypeS	Amount	Pmt#	Reference	Date
Cash	\$10.00	1/682732		31/12/2019

STotal \$10.00
GST \$0.00
Total \$10.00
Due \$0.00

An invoice with an unallocated payment will be created to refund the credit

Writing Off Bad Debt

1. Go to **Bills | Special Functions | Write off | Write off Debt**.
2. Search for Client.
3. A window will appear which is automatically set to write off all debt for any transactions still due.
4. To write off specific amount click the Clear Write Off button and then type in the amount to write off each bill.
5. Click Accept.
6. The credit balance on the client record should now be adjusted by the amount refunded.

Write Off Bad Debt for Hupta Rohan

3 Mth + \$558.30 Owed On Last Statement \$588.30
 2 Mth \$15.00 Charged Since \$0.00
 1 Mth \$15.00 Paid Since \$0.00
 Current \$0.00
 Total Owing \$588.30

Message: Unable to contact

Date	Bill#	Total	Due	Write Off
13/06/2018	1/345	\$288.30	\$288.30	\$288.30
31/07/2018	1/370	\$5.00	\$5.00	\$5.00
31/08/2018	1/413	\$10.00	\$10.00	\$10.00
30/09/2018	1/423	\$15.00	\$15.00	\$15.00
31/10/2018	1/481	\$15.00	\$15.00	\$15.00
30/11/2018	1/514	\$15.00	\$15.00	\$15.00
31/12/2018	1/519	\$15.00	\$15.00	\$15.00
31/01/2019	1/540	\$15.00	\$15.00	\$15.00

Clear Write Off

Write-Off Amount \$588.30

✓ F12 : Accept ✗ ESC : Cancel

Write Off bad Debt form

W/O Bad Debt for Hupta Rohan (# 1/1056) Branch VIZTest Till# 1

Hupta Rohan
EXISTING CLIENT

Inv Num # 1/850
Rqst Staff
Referral 0

W/O Bad Debt
Sequence No. 39

All

1 : Bill 2 : History

#	Staff	Type	Qty	Name	BBP	Discount	Base	Script	Notes	Batch	Expiry Dt	Owner	Item	Scripts	Action	Ans	PmtPrc	On_Bill	Incen	Disc
1	OWN	@	1	1>Write off bad debt for invoice# 1/345			-\$288.30						0					Y		0
2	OWN	@	1	1>Write off bad debt for invoice# 1/370			-\$5.00						0					Y		0
3	OWN	@	1	1>Write off bad debt for invoice# 1/413			-\$10.00						0					Y		0
4	OWN	@	1	1>Write off bad debt for invoice# 1/423			-\$15.00						0					Y		0
5	OWN	@	1	1>Write off bad debt for invoice# 1/481			-\$15.00						0					Y		0
6	OWN	@	1	1>Write off bad debt for invoice# 1/514			-\$15.00						0					Y		0


Account Status
 CinUpdtd 24/04/2020 6:30:52 PM
 Inventory Status
 SktUpdtd 24/04/2020 6:30:52 PM

TypeS	Amount	Pmt#	Reference	Date
Charge	-\$588.30	# 1/345		24/04/2020


STotal -\$534.88
 GST -\$53.42
 Total -\$588.30
 Due \$0.00

An invoice with messages for all the write-offs being processed.

Tax Invoice for Hupta Rohan (# 1/1056) Branch VIZTest Till# 1



Hupta Rohan
** NEW CLIENT **



Animal G (# 1/1027), Dog, Staffordshir Bull Ter [??]
Last visit at 13/06/2018
No Reminder Due

Inv Num # 1/345
Rqst Staff
Referral 0

Tax Invoice

Sequence No. 26

All Animal G

1 : Bill										2 : History						
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item_Scripts	Action_Ans	PmtPrc_On_Bill	Incen_Disc
1	~@00\			For Animal G								0	0		Y	0
2	~@00 R		10	1>Methadone	\$288.30		\$288.30					0	0		Y	0
3	~@00 ^		1	1>Outcall	\$10.00		\$10.00					0	0		N	0
4	~@00 ^		10	1>Methadone	\$278.30		\$278.30					0	0		N	0

Sub Total for Animal G including GST \$288.300

Account Status

Aged
13/06/2018

Inventory Status
StkUpdtd
13/06/2018

TypeS	Amount	Pmt#	Reference	Date
Charge	\$288.30	# 1/316		13/06/2018
W/O Bad De	\$288.30	# 1/949	On Bill# 1/850	24/04/2020

STotal \$262.09
GST \$26.21

**Total \$288.30
Due \$0.00**

Write off payment added to original bill to zero amount due

Bulk Account Payments

Bulk account payments are done by the same process as in previous versions of VetlinkSQL. All payments done using bulk account payments will be applied to the oldest due transactions.

Statement Examples

Statement Example #1 - Credit on statement with Total Owing

- An unallocated credit / deposit will show as a transaction on the statement but won't reduce the amount owing.
- The credit available will show in bottom left hand corner of the statement body.

Barrys Point Vet Clinic Tkp		PROVISIONAL STATEMENT					
21 Barrys Point Road, Takapuna, Auckland. Ph: (09) 489-2280		All Prices Include GST					
Mr. Bob Brown 21 Barrys Point Road Takapuna Auckland 4610		Jan 2020		A/C 1/11649			
		Printed: 8/01/2020 10:00:50AM		Page 2 of 2			
Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
8/01/2020	1/628783						
AC		Unallocated Payment	75.00				
		Cash	75.00				
						0.00	
8/01/2020	1/628784						
AC		For Thats Racing					
AC		1.00 Hills Cat C/D 3.8kg	68.70				
						10.30	79.00
3Month	2Month	1Month	Current	Total Owing			
0.00	0.00	0.00	79.00	79.00			
Total Paid on this statement \$75.00			Total Overdue	\$0.00			
Sales on this statement \$68.70 plus total GST of \$10.30							


Statement Example #2 – Allocating payment to a bill done in same period

1. Original unpaid invoice will show as normal on the statement
2. Payment will show on statement with item message to show which invoice it has paid off.

Barrys Point Vet Clinic Tkp		TAX INVOICE/STATEMENT					
21 Barrys Point Road, Takapuna, Auckland. Ph: (09) 489-2280		All Prices Include GST					
Mr. Joe Bloggs 21 Barrys Point Road Takapuna Auckland 0622		Dec 2019		A/C 1/20146		Printed: 8/01/2020 10:19:57AM Page 2 of 2	
Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
31/12/2019	1/627959	AC 1.00 Consultation (C)	43.48			6.52	50.00
31/12/2019	1/627960	AC 10.00 Hills Cat S/D 156gm	29.56			4.44	34.00
31/12/2019	1/627961	AC 1.00 After Hours Equine	53.22			7.98	61.20
31/12/2019	1/627963	AC Payment for Invoice# 1/627960	34.00				
		Cash	34.00			0.00	-34.00
31/12/2019	1/627964	Refund Bill					
AC	-10.00 Hills Dog KD Stew 159g	-32.17				-4.83	
31/12/2019	1/627966	*SUP* Payment for Invoice# 1/627959	37.00				
	SUP Credit Applied	-37.00				0.00	-37.00
3Month			2Month			1Month	
0.00			0.00			0.00	
Total Paid on this statement \$34.00			Total Overdue			74.20	
Sales on this statement \$94.09 plus total GST of \$14.11						74.20	
Total Owing						0.00	
REMITTANCE ADVICE			Mr. Joe Bloggs 21 Barrys Point Road Takapuna Auckland 0622				
			Dec 2019 A/C 1/20146				
			TOTAL TO PAY \$74.20				

Statement Example #3 – Allocating payment to bill done in different period

3. Payment will show on statement with item message to show which invoice it has paid off.

Barrys Point Vet Clinic Tkp			PROVISIONAL STATEMENT				
21 Barrys Point Road, Takapuna, Auckland. Ph: (09) 489-2280			All Prices Include GST				
Mr. Joe Bloggs 21 Barrys Point Road Takapuna Auckland 0622			Jan 2020		A/C 1/20146		
			Printed: 8/01/2020 11:03:38AM		Page 2 of 2		
Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
8/01/2020	1/628785						
AC		Payment for Invoice# 1/627959	13.00				
		Cash	13.00				
						0.00	-26.00
3Month	2Month	1Month	Current	Total Owing			
0.00	0.00	61.20	0.00	61.20			
Total Paid on this statement \$13.00			Total Overdue	\$61.20			
Sales on this statement \$0.00 plus total GST of \$0.00							
REMITTANCE ADVICE	Mr. Joe Bloggs 21 Barrys Point Road Takapuna Auckland 0622						
Account is 1mth overdue.							
	Jan 2020	A/C 1/20146					
TOTAL TO PAY		\$61.20					

Statement Example #4 – Refund to Account and Allocation of the Credit

1. Credit Refund will show on statement
2. Payment invoice showing credit used with item message showing which invoice it was used on
3. Invoice the payment was allocated against.

Barrys Point Vet Clinic Tkp
 21 Barrys Point Road, Takapuna, Auckland.
 Ph: (09) 489-2280

Mr. Joe Bloggs
 21 Barrys Point Road
 Takapuna
 Auckland 0622

TAX INVOICE/STATEMENT

All Prices Include GST

Dec 2019 A/C 1/20146
Printed: 8/01/2020 10:19:57AM Page 2 of 2

Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
31/12/2019	1/627959	1.00 Consultation (C)	43.48			6.52	50.00
31/12/2019	1/627960	10.00 Hills Cat S/D 156gm	29.56			4.44	34.00
31/12/2019	1/627961	1.00 After Hours Equine	53.22			7.98	61.20
31/12/2019	1/627963	Payment for Invoice# 1/627960	34.00				
		Cash	34.00				
						0.00	-34.00
31/12/2019	1/627964 Refund Bill	-10.00 Hills Dog KD Stew 159g	-32.17			-4.83	
31/12/2019	1/627966	*SUP* Payment for Invoice# 1/627959	37.00				
		SUP Credit Applied	-37.00				
						0.00	-37.00

3Month	2Month	1Month	Current	Total Owing
0.00	0.00	0.00	74.20	74.20
Total Paid on this statement \$34.00			Total Overdue	\$0.00
Sales on this statement \$94.09 plus total GST of \$14.11				

REMITTANCE ADVICE

Mr. Joe Bloggs
 21 Barrys Point Road
 Takapuna
 Auckland 0622

Dec 2019 A/C 1/20146

TOTAL TO PAY \$74.20

Statement Example #5 – Deposit and Allocation of Credit to Invoice

1. Invoice for the deposit made
2. Payment invoice showing credit/deposit used with item message showing which invoice it was used on
3. Invoice the credit was allocated against.

Barrys Point Vet Clinic Tkp
 21 Barrys Point Road. Takapuna. Auckland.
 Ph: (09) 489-2280

Mr. Nigel Smith
 21 Barrys Point Road
 Takapuna
 Auckland 1234

TAX INVOICE/STATEMENT

All Prices Include GST


Dec 2019 A/C 1/19794
Printed: 8/01/2020 10:52:07AM Page 2 of 2

Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
31/12/2019	1/627956						
AC		Unallocated Payment	100.00				
		Cash	100.00				
						0.00	
31/12/2019	1/627957						
AC		1.00 Consultation (C)	78.26				
						11.74	90.00
31/12/2019	1/627958						
AC		Payment for Invoice# 1/627957	90.00				
AC		Credit Applied	-90.00				
						0.00	-90.00
31/12/2019	1/627967 Refund Bill						
AC		Unallocated Payment	-10.00				
		Cash	-10.00				
						0.00	

3Month	2Month	1Month	Current	Total Owing
0.00	0.00	0.00	0.00	0.00
Total Paid on this statement \$110.00			Total Overdue	\$0.00
Sales on this statement \$78.26 plus total GST of \$11.74				

REMITTANCE ADVICE

Mr. Nigel Smith
 21 Barrys Point Road
 Takapuna
 Auckland 1234



Dec 2019 A/C 1/19794

TOTAL TO PAY \$0.00

Statement Example #6 – Refunding Unused Credit on Account to Client

Barrys Point Vet Clinic Tkp

21 Barrys Point Road, Takapuna, Auckland.
Ph: (09) 489-2280

TAX INVOICE/STATEMENT

All Prices Include GST

Mr. Nigel Smith
21 Barrys Point Road
Takapuna
Auckland 1234

Dec 2019

A/C 1/19794

Printed: 8/01/2020 10:52:07AM

Page 2 of 2

Inv. Date	Inv. No	Details	Amount	Disc.	IDisc.	GST	Sub-Total
31/12/2019	1/627956						
AC		Unallocated Payment	100.00				
		Cash	100.00				
						0.00	
31/12/2019	1/627957						
AC		1.00 Consultation (C)	78.26				
						11.74	90.00
31/12/2019	1/627958						
AC		Payment for Invoice# 1/627957	90.00				
AC		Credit Applied	-90.00				
						0.00	-90.00
31/12/2019	1/627967	Refund Bill					
AC		Unallocated Payment	-10.00				
		Cash	-10.00				
						0.00	

3Month	2Month	1Month	Current	Total Owing
0.00	0.00	0.00	0.00	0.00
Total Paid on this statement \$110.00			Total Overdue	\$0.00
Sales on this statement \$78.26 plus total GST of \$11.74				

REMITTANCE ADVICE

Mr. Nigel Smith
21 Barrys Point Road
Takapuna
Auckland 1234



Dec 2019

A/C 1/19794

TOTAL TO PAY

\$0.00

Appendix 2–Large Animal Prescriptions

Initial Setup for Large Animal Prescriptions

Creating/Editing Prescription Profiles

1. First check the access rights for who can create and edit Large Animal Prescriptions and add Batch and expiry details. To do this go to [Options | Setup | Staff | Access | select Product Role | Large Animal Prescriptions & Batch and Expiry](#).
2. Now you can create/edit the RVM/PAR profile. To do this go to [Options | Picklist Setup | Product | Product Restriction Profiles | select profile on left](#).

Name	The name that you would like to call this restricted product group
Status	Status should be active if you wish to use the Restricted product group
RVM Class	If it is for RVM you can select RVM class 1, 2, 3 or leave as none.
Sales Authorisation	
Log in Required	When dispensing the item the staff must be logged in with their staff ID and password to confirm who the dispensing vet is.
Always Log in	Even if the staff member is already logged in they must input their staff details each time the item is dispensed to validate the staff member.
Prescription	
Prescription Required	To dispense the drug the client must have a large animal prescription with sufficient quantity remaining. Prescriptions can be created while in the bill or from Bills Special Functions Large Animal Prsc
Production Only	A prescription is only required for production animals. Production animals are identified in the animal record where production is set to Yes.
Generate Document	If set to Yes a document can be printed for the prescription. It will either be the default document under Options Setup Product Forms Edit PAR template, or the custom document for the product which is under the More tab of the product record.
Default Months	If creating a new prescription it will be valid for x months.
Exclude Batched	As the visits for batch bills have usually already been completed and the drugs dispensed by the vet, the requirement to check for a prescription can be ignored.
Purchase Validation	
Log in Required	When receipting inwards goods invoices the staff member must log in with staff ID and password to record who receipted that drug into the clinic.
Other	
External Register	For Schedule drugs the transactions can be uploaded to Vet S8.
Record Expiry / Batch	For all the drugs that are assigned to a product restriction group you can assign whether they require a batch and expiry to be entered each time the item is dispensed. It can also be set to optional where the batch and expiry entry window is shown but users don't have to enter anything.

Set up Prescription Forms

Editing the Default Prescription Form

1. Go to **Options | Picklists | Products | Restricted Products Profiles...**
2. Click **Edit A4 or A5 template.**
 - a. A5 Template: This is the template that will be printed for each prescription item.
 - b. A4 Template: This is the combined prescription template. Where each prescription is merged onto one form.

Customising a Products Prescription Form

1. Open the product record and click on the **2: More** tab.
2. At the bottom of the form you should now see two buttons, **Default** and **Customise**. Click either to select which one to print. The button highlighted blue is the current form being used. If you click on the **Customise** button a word processor will open for you to create a custom prescription form where you can add in the specific withholding periods, active ingredients, dosages, etc.. as required..

Restricted Products Profiles

Number	Name	Status
1	RVM Class 1	A
2	RVM Class 2	A
3	RVM Class 3	A
4	Schedule 4	I
5	Schedule 5	I
6	Schedule 6	I
7	Schedule 7	I
8	Schedule 8	I
9		I
10		I
11		I
12		I
13		I
14		I
15		I
16		I
17		I
18		I

Name: RVM Class 1
Status: Active
RVM Class: Class 1

Sales Authorisation
Log In Required: Yes
Always Log In: No

Prescription
Prescription Req'd: Yes
Production Only: Yes
Generate Document: Yes
Default Months: 1
Exclude Batched: Yes

Purchase Validation
Log In Required: No

Other
External Register: No
Record Expiry / Batch: No

Print Templates
Edit A5 Template
Edit A4 Template

F2 : Save Esc : Cancel

Default Forms in Picklists

Depocillin Inj - Per ML (100 ml) (Product# 1/1002)

1: General 2: More 3: Stock 4: Discs 5: Complex 6: History 7: Stats 8: Doc Mgr

Round Sell: On Product To: 1
Buy GST: GST
Sell GST: GST

Cautions: No
Use Expiry: No
Barcode: No Label
Category-3: Farm
Category-4: Default
Category-5: Default
Export To: A

Prescription: Default Custom Link to Diary Reason(s)

Apply price changes on Purchase Invoice entry
Update List Price when new Buy Price exceeds: Yes

Custom Prescription form in Product Record

PRODUCTION ANIMAL PRESCRIPTION AUTHORIZATION FOR SUPPLY

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland.
Ph: (09) 489-2280

This prescription is for Animal Use Only
Prescription Animal Remedy (PAR) Prescription Medicine

30/04/2020 12:42:29 a.m.

Small Farms Limited
Dave Smithy
13 Oxford Street
Paddington Paddington

Name & Strength	Depocillin Inj - Per ML
Active Ingredient	Procaine penicillin 300,000IU/ml
Qty Available	100
Start Date	30/04/2020
Expiry Date	30/05/2020
Indications	Good for superficial infections (wounds and abscesses). Navel ill in calves
Dosage	Large animals: 1ml/25kg i.e. 20mls per 500kg
Frequency	Repeat if required at 48 hour intervals up to 3 times
Admin Site	Into the muscle
Storage	Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e only 5 months
Milk Withholding	1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days
Meat Withholding	Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days
Other Precautions	Not for use in bobby calves

NOTE: Animals must not be slaughtered until AFTER the withholding period has expired. This prescription must be first dispensed within 30 days of the above date.

Signed: Dr Joseph Read [JR]

Withholding Period and Prescription Notes

Any special product related notes such as Withholding periods, active ingredients, dosages etc....these can be set up as Advanced notes to print on the combined prescription form (A4 Template). To set these up go to the **Product record | General tab | Ctrl-N (Notes) button | Add New note | tick Print on Prescription**.

Adding note to print on Combined Prescription (A4 template)

Drug Name	Qty	Start On	Finish On
Depocillin Inj - Per ML Prescribed by Mr. Read, Joseph on 30/04/2020 MILK WHP: 1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days MEAT WHP: Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days Not for use in bobby calves Active Ingredient: GREEN: Procaine penicillin 300,000IU/ml Indications: Good for superficial infections (wounds and abscesses). Navel ill in calves Dose: Large animals: 1ml/25kg i.e. 20mls per 500kg Frequency: Repeat if required at 48 hour intervals up to 3 times Administration Site: Into the muscle Storage: Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e. only 5 months	100	30/04/2020	30/05/2020
Oxytocin Ethical Agents Prescribed by Mr. Read, Joseph on 30/04/2020 Milk WHPs: Nil Meat WHP: Nil Indication: Heifer milk let down; After a difficult calving Dose: 1-2ml at milking for let down; 1ml/100kg after calving Frequency: As required Administration site: Into the muscle Storage: Store below 25 degrees. Protect from light	100	30/04/2020	30/05/2020

Following this consultation the listed RVM(s) may be dispensed. By signing this form, the farmer/manager agrees that they will use the drugs according to instructions, contraindications and withholding times and accepts responsibility for ensuring that staff complies with the expectations of this authorisation. Use of these drugs will be documented as to the animal on which they were used, the time, date and dosage, as well as withholding period. CFL Test Database reserves the right to refuse sale of such drugs if the documentation of on-farm drug use does not satisfy requirements. On farm training for correct administration and storage of these medicines has offered.

Prescribing Veterinarian: _____ Date: _____ Signature: _____

Farmer/manager: _____ Date: _____ Signature: _____


Combined Prescription form with all items (a4 template)

Client Prescription Note (Supply Number)

A new client prescription note has been added. This is intended to be used for entering the Supply Number's for the Farms, however may be used for other notes that you need printed on the prescription form as well.

To set these up go to the [Client record | General tab | Ctrl-N \(Notes\) button | Add New note | tick Print on Prescription](#).

In the Prescription templates then add the Client Note mail merge field. The field will then automatically merge into document when printed.

**BARRYS POINT VET CLINIC**
imaginary Vet Clinic

CFL Test Database
21 Barry's Point Road, Takapuna, Auckland., Ph: (09) 489-2280

Production Animal Authorisation For Future RVM 27/08/2020
Mr. Dave Smithy 13 Oxford Street Paddington Paddington NSW 2021
Small Farms Limited
Supply Number 1234 -5678, 2345-9876

Drug Name	Qty	Start On	Finish On
Depocillin Inj - Per ML	100	30/04/2020	30/05/2020

Prescribed by Mr. Read, Joseph on 30/04/2020
MILK WHP: 1 dose = 48 hours; 2 doses = 60 hours; 3 doses = 72 hours. Sheep 35 days
MEAT WHP: Cattle & sheep - 4 days; Pigs - 5 days; Horses - 63 days
Not for use in bobby calves
Active Ingredient: GREEN: Procaine penicillin 300,000IU/ml
Indications: Good for superficial infections (wounds and abscesses). Not ill in calves
Dose: Large animals: 1ml/25kg i.e. 20mls per 500kg
Frequency: Repeat if required at 48 hour intervals up to 3 times
Administration Site: Into the muscle
Storage: Shake well before use. Store at 2-8 degrees. Do not freeze. May be stored below 25 degrees for short period i.e only 5 months

Set Products to Restricted Profile

For each product that requires a prescription, Open the product record and in the General tab set the **Restricted** field to the profile required, eg RVM Class 1.

Create Prescription Groups

Prescription Groups can be created to organise similar / interchangeable drugs into a group. When you need to dispense an item in a prescription group, any other item in that same group can be used to fill the prescription. This is handy if you are out of stock of one brand but can still fill the prescription with the same drug from another brand.

To set up a Prescription Group go to **Options | Picklist Setup | Products | Prescription Group | click + to add new Group name.**

Next go to the **More** tab of each product record in that group and set the relevant **Prescription Group** name.

You still set up the prescription and dispense the drug the same way, however VetlinkSQL will work if you are dispensing a drug from a prescription group and adjust the prescription accordingly.

Carpieve Tabs 100mg (Product# 1/11322)

1: General 2: More 3: Stock 4: Discs 5: Complex 6: History 7: Stats 8: Doc Mgr

Name: Carpieve Tabs 100mg

Size: [blank]

Class: Drug

Printed Name: [blank]

Category-1: ETHC

Category-2: ETHC

Anim Types: *ALL*

Action: None

Rem Type: [blank]

Label Type: Tablet

Def. Label: T1/22

Restricted: RVM Class 1

Pref. Supplier: S V S Veterinary Supplies

Status: Active

User Code: CARPPIEVE1

Complex: Drug

Certificate: [blank]

Handout: Rimadyl RTF

Reporting: No

Pack Prices (Exc Tax)

Buy Discount	Buy Price	Net Cost	Avg Cost
0.000 %	\$100.580	\$100.580	\$98.646
0.000 %	\$100.580	\$100.580	\$98.646
0.000 %	\$100.580	\$100.580	\$98.646

Unit Cost: \$1.13

Unit Sell: \$2.770

Pack Sell Price: \$276.780

Price Scheme: List + Markup

List Price: \$100.580

Markup: 139.290 %

Sell Price: \$240.678

Margin: 59.013 %

Size of the Product, printed in brackets at the end of the name

Set Restricted Profile

Carpieve Tabs 100mg (Product# 1/11322)

1: General 2: More 3: Stock 4: Discs 5: Complex 6: History 7: Stats 8: Doc Mgr

Round Sell: 1

Buy GST: GST

Sell GST: GST

Caution: [blank]

Use Expiry: No

Category-3: Default

Category-4: Default

Category-5: Default

Export To: [blank]

Prescription Group: Anti Flare

Apply price changes on Purchase Invoice entry

Update List Price when new Buy Price exceeds: Yes

Update Sell Price when: Percent change to List Price is greater than 0.00 % or less than 0.00 %

GL Codes

Sales: [blank]

Cost: [blank]

Valuation: [blank]

Finished

Set Prescription Group

Prescription for Cumin Tegan (# 1/1003)

Cumin Tegan

143 Princes Highway

Port Fairy VIC 3284

Prescription # 1/11

Date 5/09/2018

Staff [blank]

Prescription Items

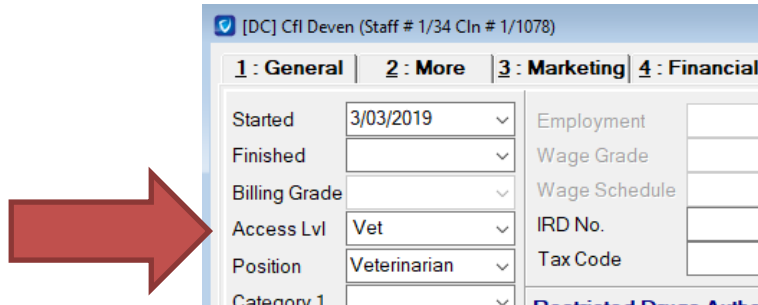
Description	Qty Allowed	Start Date	End Date
Novormon/Pregnecol 20000iu (Group A)	1	5/09/2018	5/10/2018

F12: Finish F2: Add Message F3: Change Date F11: Save & Exit F10: Cancel

Prescription Group at Billing

Set Access Level to Create Prescriptions

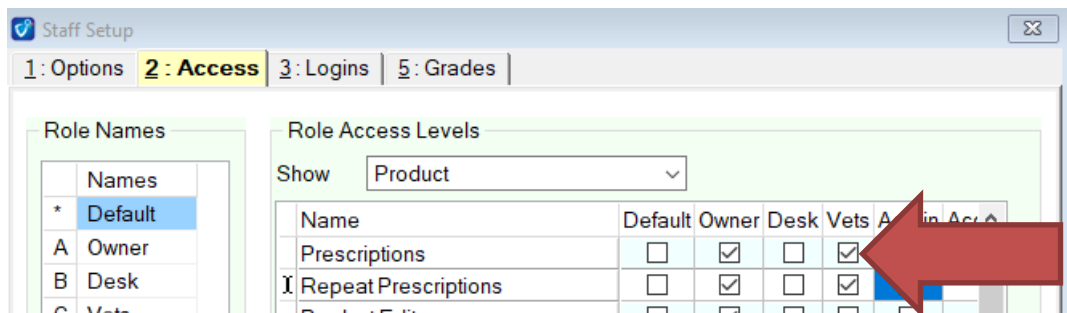
1. In the vet's staff record under the **8: Staff Tab** make sure the access level is set to **Vet**.
2. To set the access level so only Vets can create a prescription go to **Options | Setup | Staff | 2: Access tab | Change category to Product | Tick Prescriptions for your Vets Access level**



[DC] Cfl Deven (Staff # 1/34 Cln # 1/1078)

1: General 2: More 3: Marketing 4: Financial

Started: 3/03/2019
 Finished:
 Billing Grade:
 Access Lvl: Vet
 Position: Veterinarian
 Category 1:
 Employment:
 Wage Grade:
 Wage Schedule:
 IRD No.:
 Tax Code:
 Restricted Drugs Authorisation:



Staff Setup

1: Options 2: Access 3: Logins 5: Grades

Role Names

Names
* Default
A Owner
B Desk
C Vets

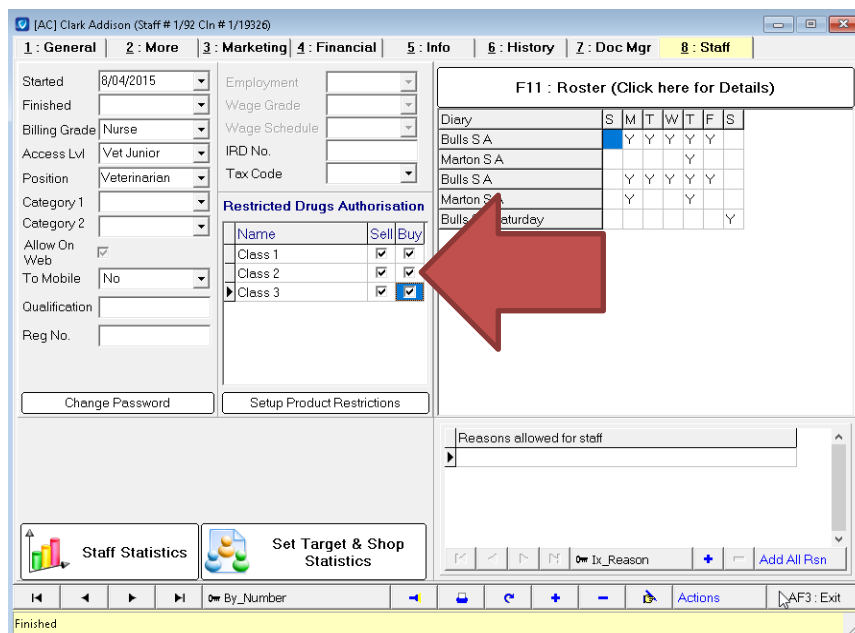
Role Access Levels

Show: Product

Name	Default	Owner	Desk	Vets	Admin	Access
Prescriptions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repeat Prescriptions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Set RVM Class for Staff Members to Sell / Buy

For each staff member set which RVM classes they are able to buy/sell. This will enable counter staff to dispense the drug if a prescription has been created by the vet.



[AC] Clark Addison (Staff # 1/92 Cln # 1/19326)

1: General 2: More 3: Marketing 4: Financial 5: Info 6: History 7: Doc Mgr 8: Staff

Started: 8/04/2015
 Finished:
 Billing Grade: Nurse
 Access Lvl: Vet Junior
 Position: Veterinarian
 Category 1:
 Category 2:
 Allow On Web: ☒
 To Mobile: No
 Qualification:
 Reg No.:
 Employment:
 Wage Grade:
 Wage Schedule:
 IRD No.:
 Tax Code:
 Restricted Drugs Authorisation

Name	Sell	Buy
Class 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Class 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Class 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Change Password Setup Product Restrictions

Staff Statistics Set Target & Shop Statistics

By Number

AF3: Exit

Set Animal Profile to automatically set to Production

Each Animal Profile has a flag for Production so new animals are automatically marked as production when they are created. To check this go to [Options | Picklists Setup | Animal | Profile | select animal type | set Production to Yes](#).

The screenshot shows the 'Animal Profile - 6' window. At the top, a yellow banner states: 'You may change the Code, Name, Status and Life Stage fields. The Number and Latin Name are fixed'. Below this, the 'Code' is 'CD', 'Name' is 'Cattle Dairy', and 'Latin Name' is 'Bovine'. The 'Status' is 'Active'. The 'Life Stage' section has 'Use It' set to 'No' and a 'Popup when used' dropdown. The 'Production' dropdown is highlighted with a red box and set to 'Yes'. Other dropdowns include 'Herd Animal' (Yes), 'Young' (calf), 'Adult' (adultcow), 'Old' (senior cow), and 'Super' (supercow). At the bottom, there are buttons for 'F12: Accept', 'ESC: Cancel', and a 'Yukti' button.

Setting Up Animals as Production

If your restricted profile has been configured to only require Production animals to have a prescription you need to ensure Production is set to Yes in the animal record. To check this;

1. Search for and open up an animal record.
2. Under [General](#) tab make sure [Prodn.](#) is set to [Yes](#).

Tip: To default production to Yes when a new animal is created for a specific animal type go to [Options | Picklists Setup | Animal | Animal Profiles | select animal type | set Production to Yes](#).

The screenshot shows the 'Dairy Herd (Animal# 1/9353)' window. The '1: Personal' tab is selected. The 'Name' is 'Dairy Herd', 'Age (Y/M)' is '6/0', and 'DOB' is '25/01/2008'. The 'Type' is 'Cow', 'De-sexed' is 'No', and 'Deceased' is 'No'. The 'Owner' is 'Bloggs Annie (2/939)', 'Chg To' is 'Bloggs Annie (2/939)', and 'Location' is 'Bloggs Annie (2/939)'. The 'Prodn.' dropdown is highlighted with a red box and set to 'Yes'. The 'Status' is 'Active'. The 'Code' is empty, 'Chip Id' is empty, 'First Vst' is '21/03/2011', 'Last Vst' is '7/08/2012', and 'Herd Siz' is '100'. The 'Weight' section has 'Ideal' empty, 'Last' is '10', and 'on' is '7/08/2012'. The 'Due Reminders' and 'Vaccinations' sections are empty. The 'Life Stage' dropdown is set to 'Unknown'. The 'Pls Updt Breed Data' button is visible. The bottom of the window shows a toolbar with navigation buttons and a status bar with 'Anm_By_Number' and 'AF3: Exit'.

Making a Large Animal Prescription

1. LA Prescriptions can be created in two ways;
 - a. **Billing Special Functions:**
 - i. Go to **Bills -> Special Functions -> Large Animal Prsc button.**
 - ii. A prescription search form will open. Click on the **New** button to make a new prescription.
 - iii. Search and select the client you wish to make the prescription for and the prescription form will open.
 - b. **Client Record:**
 - i. **Go to Client | Financial tab.**
 - ii. In Product Restrictions section click **View Details** button then go to click **Prescriptions tab** and click **F7: New** button.
2. Select your staff ID and then press the tab key to begin adding items to the prescription.
3. A product search screen will open. Search for and select the prescribed product that you wish to add to the prescription.
4. The item you have selected should now appear on the prescription form. You can now enter the quantity that client is allowed and the date range for the prescription.
5. Press the down arrow key on the keyboard to add more items.
6. To finish the prescription, click on the **Finish** button or to save the prescription and come back to it later click on the **Save & Exit** button.
7. After finish the Prescription you can print the forms. On the print screen you can either;
 - a. Print all prescriptions items on one form by ticking items then clicking the Print Selected button.
 - b. Print forms one at a time for each item by clicking the blue print script on the right hand side of the form.

Prescription for Smith Jacinta (# 1/16047)

Smith Jacinta
28 Meadow Lane
Fort Worth

Prescription # # 0/9298
Date 30/05/2019
Staff OWN

Description	Qty Allowed	Start Date	End Date
Betamox LA Inj 100ml	100	30/05/2019	30/06/2020
X Carprieve Tabs 100mg (Anti Flam)	60	30/05/2019	30/06/2020

F12 : Finish F2 : Add Message F3 : Change Date F11 : Save & Exit F10 : Cancel

Prescription Form

Print Prescriptions

Select items to print prescription

To Print	Name	Print
<input checked="" type="checkbox"/>	Betamox LA Inj 100ml	
<input type="checkbox"/>	Carprieve Tabs 100mg	

F12 : Print Selected ESC : Close

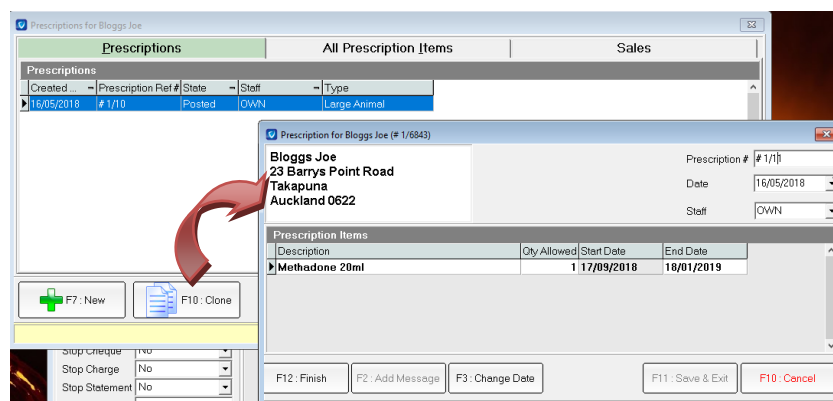
Print Prescriptions Form

Billing Prescribed Items

1. Create and open a bill for a client and animal, where the animal on the bill has the **Prodn** field on the animal record set to **Yes**.
2. Add a product to the bill which has the **Restricted** field on the product record is set to a profile requiring a prescription, eg RVM Class 1.
3. The product will be added to the bill without any warnings if;
 - a. The client has a prescription for that item.
 - b. The amount they are purchasing does not exceed their prescription limit. The billing date is within the allowed prescription period.
4. If any of the criteria are not met, then a prompt will appear asking you if you wish to make a prescription.
 - a. If you select **Yes**, you will be taken to the prescription form to edit the existing prescription or to create a new one.
 - b. If you select **No** the product will be added to bill without a prescription being created.
 - c. If you select **Cancel** the product will not be added to the bill.

Clone Large Animal Prescription

In the prescription screen from the client record you can clone a previous prescription. This is handy when you want to copy prescription with lots of items for a farm from the previous year. To do this, go to [Client record | 4: Financial tab | View Details \(for Product Restrictions\) | Prescriptions tab | F10: Clone | Adjust and details as needed](#).



Increasing the Quantity Allowed on a Large Animal Prescription

You can increase the quantity allowed of a by creating a new prescription for the same period as per one of the methods described above.

Changing the Dates on a Large Animal Prescription

To comply with legal requirements changing date on a prescription is not allowed. This is so the prescription that is printed and given to the farm always matches what was created in VetlinkSQL. You can create a new prescription, or inactivate the prescription with incorrect dates then make a new one instead.

Inactivating a Large Animal Prescription

You can inactivate a large animal prescription from [Client record | 4: Financial tab | View Details \(for Product Restrictions\) | All Prescription Items tab | select Prescription | click F12: Inactivate](#).

Viewing a Clients Large Animal Prescriptions

1. Open the client record that you wish to view prescriptions for.
2. Click on the **3: Financial** tab.
3. All the active prescriptions should now be showing in the bottom right hand corner of the form.

The screenshot shows the 'Financial' tab selected in the client record. The 'Product Restrictions' table is highlighted with a red box. The table has the following data:

Product	Start On	Finish On	Staff ID	Discount %	Inc Disc %
Betamox LA Inj 100ml	30/05/2019	30/06/2020		100	0
Carprieve Tabs 100mg	30/05/2019	30/06/2020		60	0

4. To view the prescriptions in more detail and to print off an existing prescription form click on the **View Details** button.
5. The **Prescription** form will open. It is split into three tabs:
 - The **Prescription Items** tab will list all the items that have been on a prescription for that client. It can be sorted by ticking the sort order in top right corner.
 - The **Prescriptions** tab will list all the prescriptions that have been made for a client.
 - Prescriptions that have been refunded are shown in red while all other prescriptions are shown in black.
 - To view all the items that were on a prescription double click on the item name and the prescription form will open.
 - The **Sales** tab will show all the prescription sales that have been made.

The screenshot shows the 'Prescription Items' tab. The table lists the items on the prescription:

Prescription Ref #	Created Date	Product Description	Quantity	Start Date	End Date	PAR File
# 0/9298	30/05/2019	Carprieve Tabs 100mg (Anti Flam)	60	30/05/2019	30/06/2020	
# 0/9298	30/05/2019	Betamox LA Inj 100ml	100	30/05/2019	30/06/2020	

Prescription Items

The screenshot shows the 'All Prescription Items' tab. The table lists the prescriptions:

Created ...	Prescription Ref #	State	Staff	Type
30/05/2019	# 0/9298	Posted	OWN	Large Animal

All Prescription

The screenshot shows the 'Prescription Sales' tab. The table lists the sales:

Ref #	Bill Item Ref #	Prescription Ref #	Product Ref #	Product Name	Quantity Sold	Sell Date	Group
# 0/21547	# 1/3158244	# 0/9298	# 1/1385	Betamox LA Inj 100ml	5	30/05/2019	

Prescription Sales

Printing an Existing Prescription Form

1. Open the client's record and click on the **Financial** tab.
2. Click on the **View Details** button.
3. The Prescriptions window will open showing all Prescribed items.
4. To print a prescription form for just one item click the blue script button on the right of the form for the items you require.

The screenshot shows the 'Prescriptions' window with the 'All Prescription Items' tab selected. A table lists two items:

Prescription Ref #	Created Date	Product Description	Quantity	Start Date	End Date	PAR File
0/9298	30/05/2019	Carprieve Tabs 100mg (Anti Flam)	60	30/05/2019	30/06/2020	[Script Icon]
0/9298	30/05/2019	Betamox LA Inj 100ml	100	30/05/2019	30/06/2020	[Script Icon]

A red box highlights the 'PAR File' column. At the bottom, there are buttons for 'F11 : Activate', 'F12 : Inactivate', and 'ESC : Close'.

5. If you want to reprint the form with all items on the prescription click the **Prescriptions** tab.
6. Double click the prescription you wish to print.
7. Click the **print** button
8. Tick the items you wish to print on one form and select **Print Selected**.

The screenshot shows the 'Prescriptions' window with the 'Prescriptions' tab selected. A red arrow points to the 'Print' button (F4) at the bottom. Another red arrow points to the 'Print Prescriptions' dialog box, which is open and shows a list of items to print:

To Print	Name	Print
<input checked="" type="checkbox"/>	Betamox LA Inj 100ml	[Script Icon]
<input checked="" type="checkbox"/>	Carprieve Tabs 100mg	[Script Icon]

At the bottom of the dialog box, there are buttons for 'F12 : Print Selected' and 'ESC : Close'.

Large Animal Prescription Reports

Client PAR Details (searches for PARs by expiry date)

Joe Bloggs 21 Barry's Point Road, Waitomo Caves 0622	Contact Details: Work: 07 1234567 Home: 07 1234567 Mobile: 021 031 6899
---	---

Product Name	Prd No.	Start Date	Staff	Allowed	Exp. Date
Clavulox Palatable Drops (15ml)	1/3539	25/03/2010	AJ	50.00	25/03/2011
Clavulox Tablets 500mg	1/9289	22/03/2010	AJ	50.00	22/08/2010
Masticillin RTU 30ml (box)	1/4968	22/03/2010	AJ	4.00	22/03/2011

Client PAR Details (Start Date) (searches for PARs by start date)

Joe Bloggs 21 Barry's Point Road, Waitomo Caves 0622	Contact Details: Work: 07 1234567 Home: 07 1234567 Mobile: 021 031 6899
---	---

Product Name	Prd No.	Start Date	Staff	Allowed	Exp. Date
Clavulox Palatable Drops (15ml)	1/3539	25/03/2010	AJ	50.00	25/03/2011
Clavulox Tablets 500mg	1/9289	22/03/2010	AJ	50.00	22/08/2010
Masticillin RTU 30ml (box)	1/4968	22/03/2010	AJ	4.00	22/03/2011

Nearing PAR Expiry

Product Name	Size	Code	Start Date	Allowed	Sold	Remaining	Expiry Date
Staff Member: 10000008451 (12)							
Bloggs, Joanne (8819) 66 McGiven Drive, Springfield R.D., Canterbury 81 Hm: 06 7695951							
Clavulox Drops	15ml		13/04/2007	1.00	0.00	1.00	13/04/2007

Appendix 3 – Telemedicine

A new option for making tele-medicine consults has been added to the online booking module. VetLinkSQL has integrated with the software Zoom to provide the ability to perform video consults over the internet.

Note: Telemedicine is not available for Consult room type columns.

Making a Telemedicine Booking from Online Booking

1. On the client side, the client can now select the appointment type for their booking. Select either [Telemedicine Consult](#).
2. Choose the service to book. Depending on what Appointment Type they select only services of that type will be displayed to select.
3. Enter other details as required.
4. If you have enabled terms and conditions the client must accept Terms and Conditions. (They must click the link before they can tick the check box).

The screenshot shows the 'BOOKING INFO' tab of an online booking form. The form has several dropdown menus: 'Branch' (Demo), 'Appointment Type' (Telemedicine Consult), 'Service' (Consultation), 'Staff' (Any staff), and 'Num of Patients' (1). A red arrow points to the 'Telemedicine Consult' option in the 'Appointment Type' dropdown. Below the dropdowns, there is a checkbox labeled 'I agree to the Terms and Conditions.' which is checked. A red arrow points to this checkbox. Below the checkbox, there is a text line: 'Telemedicine consultations have limitations so please read our terms and conditions before proceeding.' At the bottom right of the form, there is a red 'NEXT' button.

- A list of available appointment slots will be displayed for. Only free slots for staff that have a telemedicine enabled will be available. Choose the slots as per the normal online booking process.

08 Nov 18 - 10 Nov 18			
	Thu 08	Fri 09	Sat 10
Ms. Penelope Pittstop	15:15	08:00	09:00
	15:45	08:15	09:15
	16:15	08:30	09:30
	16:30	08:45	09:45
	19:15	09:00	10:00
	19:30	09:15	10:15
	19:45	09:30	10:30
		09:45	10:45
		10:00	11:00
		10:15	11:15

- The client can then enter their details or log into their account to book the appointment.
- Once the booking has been made your customised [Appointment Request/confirmation](#) message will be displayed / emailed.

A link will be added in the email that will take the client to the waiting room area of Zoom, where they can wait until the vet begins the video consult, upon which the client will be brought into the meeting,.



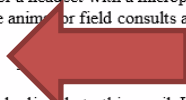
BARRYS POINT VET CLINIC
imaginary Vet Clinic

Barrys Point Vet Clinic (Demo) - Appointment Request Received

Dear John Smith,

Your Telemedicine booking has been accepted; we will contact you if there is any change. Please click on the link below to start your zoom telemedicine consultation a few minutes before your appointment. The Vet and/or the nurse will be with you as soon as they can. Please note that you will need a device with an internet connection and either speakers, microphone and a webcam, or a headset with a microphone and accompanying webcam. Alternatively, you may use your mobile device such as a phone or tablet which has an in-built camera. For large animal or field consults a mobile device is ideal. Please do let us know well in advance if you cannot make your appointment.

[Click here to start the Telemedicine consult.](#)



This is an automated email. Please do not reply directly to this email. If you have any enquiries please contact support@cfl.co.nz.

Appointment details:

Fluffy

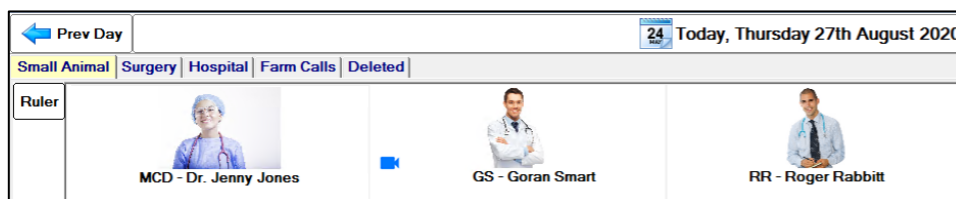
Tele-Medicine Consult 30

Tue, 05 May 20, 12:00 - 12:30

Please note that all Tele-medicine Consults have to be pre-paid.

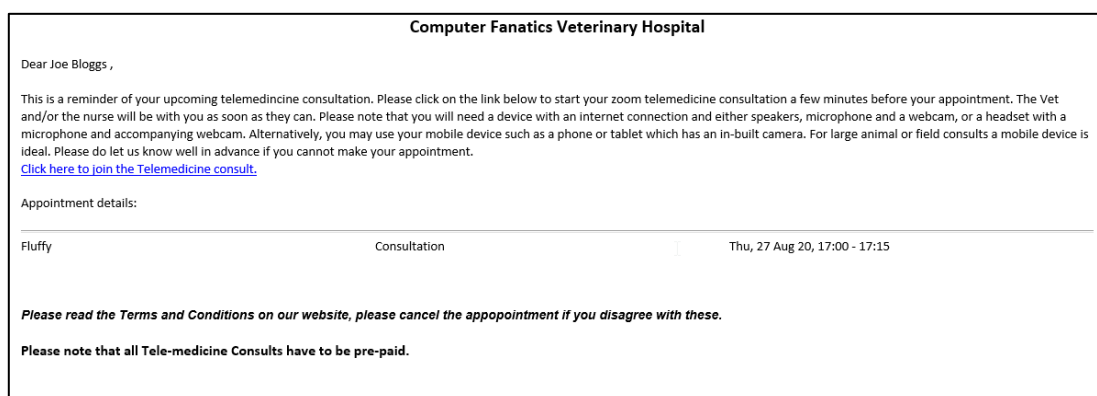
Making a Telemedicine Booking from VetlinkSQL

1. To indicate that telemedicine booking can be made for a staff member a small blue camera icon will appear at the top of the staff column.



2. Make the appointment as normal and tick the Telemed Apmt box before finishing it.

3. You can pre-configure appointment reminders messages that are specific for telemedicine including the link for the telemedicine appointment.



Example default email from telemed appointment (message is customisable by user)

4. The appointment will be made and a small blue camera icon will be added to appointment to indicate it a Telemedicine appointment.



Note:

- If you move a telemedicine appointment to another time the time if zoom will be adjusted as well.
- If you move the appointment between staff and both staff are enabled for telemedicine the booking will moved to the correct account in zoom as well.
- If the telemedicine appointment is moved to a staff member without telemedicine the booking will be removed from zoom.

Starting a Telemedicine Booking from VetlinkSQL

1. To start the telemedicine appointment right click on the appointment and go to Telmed then Start Meeting.
2. If the client no longer has the booking link you can also resend the Telemed Link by Email or SMS from here as well.

	Telemed	Start Meeting
	Bill F10	Send Telemed Link By Email
	History	Send Telemed Link By SMS
	View Animal Details	Convert to Standard Appointment
	View Animal History	
	View Client History	
	View Address Directions	
	Take Animal Photo	
Joe Bloggs	Email / SMS	
Fluffy [??] Cat, Abyssinian. ()	Print History	
Consultation	Print Form	
094892280(W) / 02141234567(M)		

Telemedicine Setup

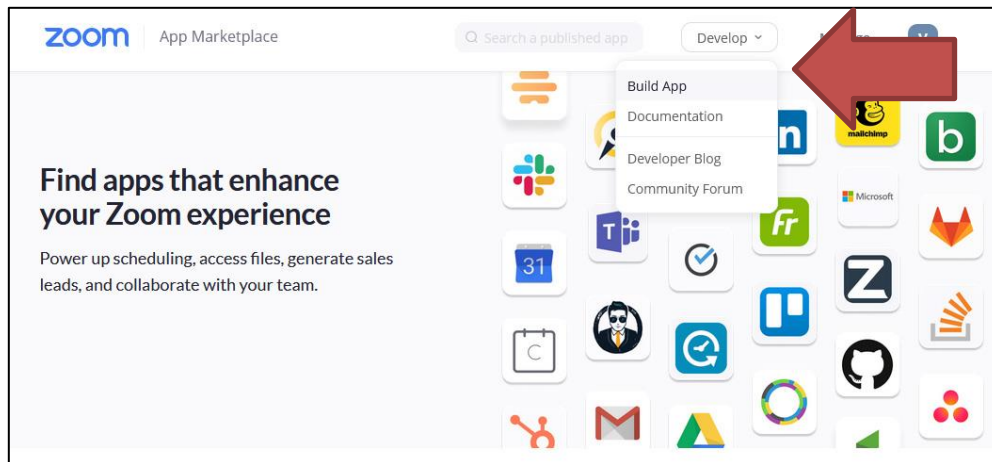
Contact CFL to Enable Telemedicine

Please contact sales@cfl.co.nz to enable the Telemedicine module. If you don't already have a Zoom account, please don't purchase a plan until you have spoken to CFL.

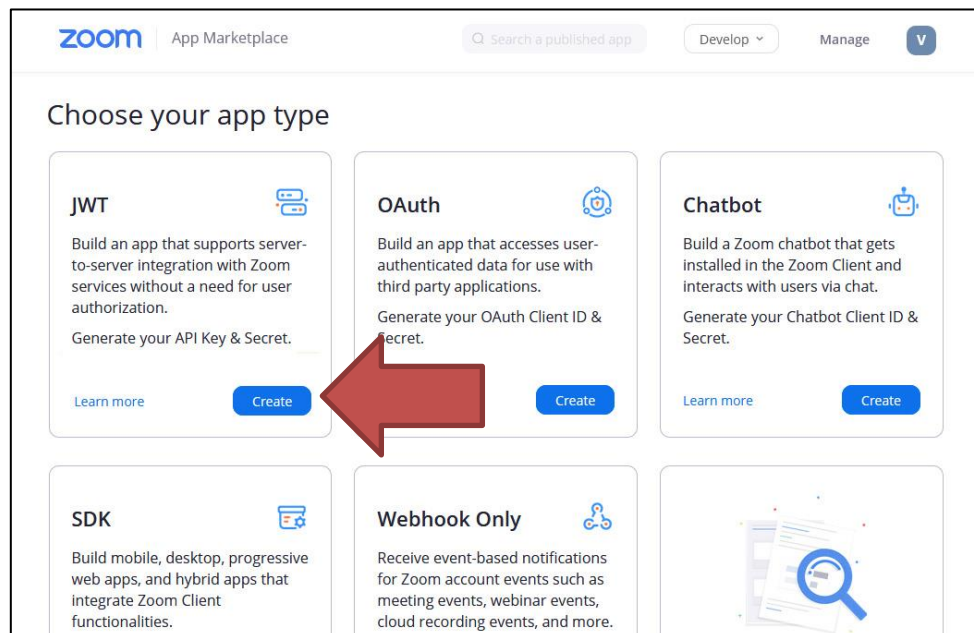
Link Zoom Account to VetlinkSQL / Install JWT App

Register Your App

1. Sign in using your Zoom Admin Account and visit the [Zoom App Marketplace](#). Click on the [Develop](#) option in the dropdown on the top-right corner and select [Build App](#).

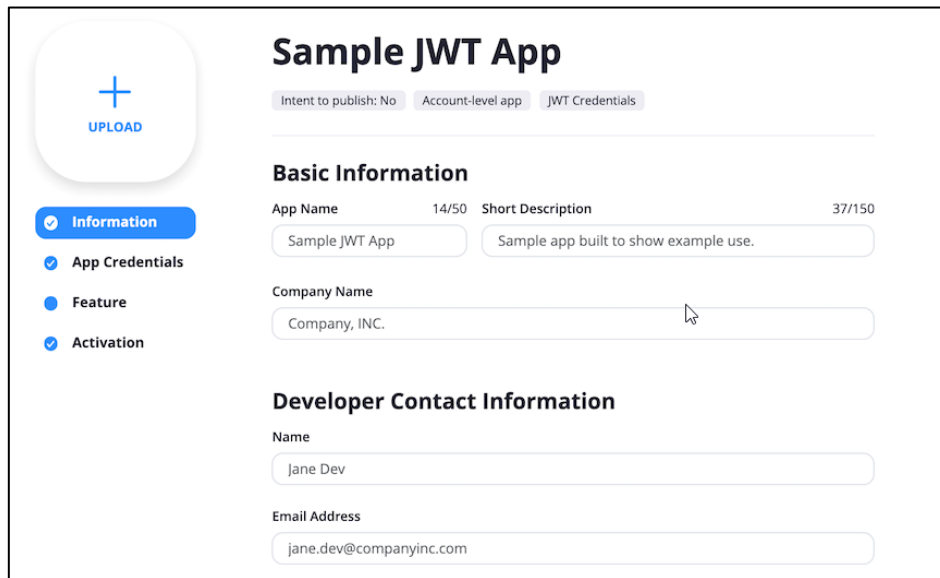


2. Select [JWT](#) as the app type and click on [Create](#).



App Information

1. Enter an [App name](#) and [description](#). Eg. VetlinkSQL and Online booking
2. Add [Developer Contact](#) name and email, which may be used by the Zoom Marketplace Team or your users for any inquiries regarding your app. E.g. Name = CFL and email = support@cfl.co.nz.



Sample JWT App

Intent to publish: No Account-level app JWT Credentials

Basic Information

App Name 14/50 Short Description 37/150

Sample JWT App Sample app built to show example use.

Company Name

Company, INC.

Developer Contact Information

Name

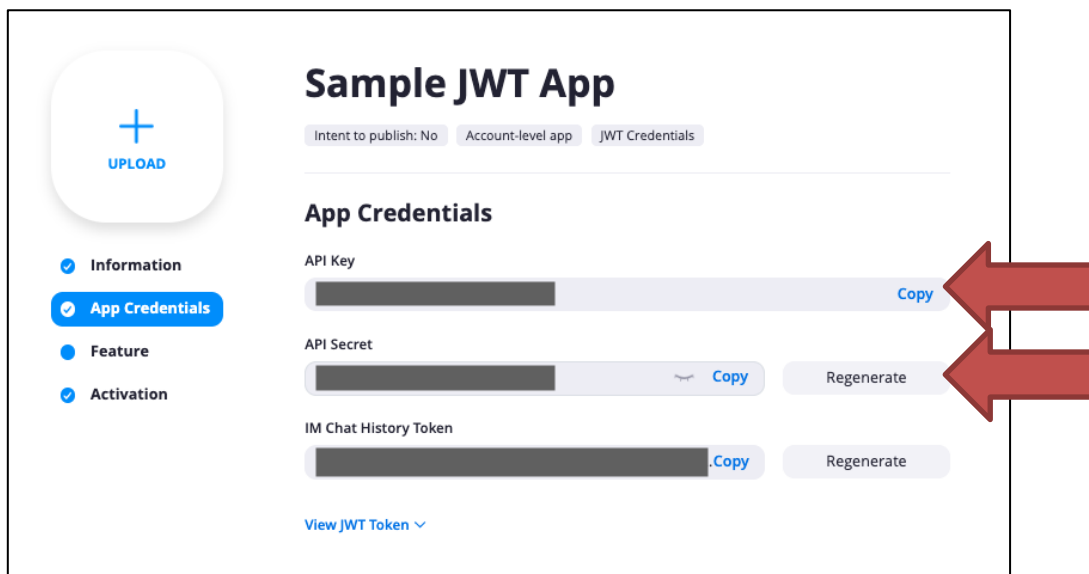
Jane Dev

Email Address

jane.dev@companyinc.com

Generate App Credentials

1. Copy the **API Key** and **API Secret**, email them to CFL to set up the Telemedicine feature.



Sample JWT App

Intent to publish: No Account-level app JWT Credentials

App Credentials

API Key

Copy

API Secret

Copy Regenerate

IM Chat History Token

Copy Regenerate

[View JWT Token](#)

2. Once you've accessed your API Key and Secret and copied over any needed tokens, click Continue.

Add App Features

3. This is optional. Click **Continue**.

Activation

4. Your app is all set to make requests to any Zoom APIs for VetLinkSQL Telemedicine features. Please note that if you **Deactivated your app**, your app will not be authorized to make VetLinkSQL Telemedicine requests.

Zoom Users Management for Vets to use VetLinkSQL Telemedicine Feature

Create a Developer Role for Accessing APIs

Note: The main user will already be assigned to the **Owner** role which will have access to the telemedicine features so does not need to be added to the developer role as described by the steps below.

1. Login to your Zoom Admin Account at zoom.us and navigate to **Admin > Role management**.
2. Click on **Add Role**.

4 Roles

Each user will belong to one of the roles below, and different roles have different privileges.

Role Name	Description	Number of Members	
Owner	Account owner has full privileges to access and manage a Zoom account.	1	
Admin	Admins have wide range privileges to access and manage a Zoom account.	0	Edit
Member	Members have access to basic Zoom video meeting functions but no account management privileges.	0	

3. Enter **Developer** as the Role name and click on **Add**. Once the role is created, click on the **Edit** button of the Developer role.

Admin	Admins have wide range privileges to access and manage a Zoom account.	0	Edit
Member	Members have access to basic Zoom video meeting functions but no account management privileges.	0	
Developer		1	Edit Delete

4. In the **Role Settings** tab, scroll down to the **Advanced features** section and tick the **Zoom for developers** and **Marketplace** options.

	View	Edit
Zoom for developers Build and publish apps on Marketplace	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H.323/SIP room connector View or edit H.323/SIP room connector	<input type="checkbox"/>	<input type="checkbox"/>
Meeting connector Setup token and environment for meeting connector	<input type="checkbox"/>	<input type="checkbox"/>
Hybrid Setup token and list proxy Zone Controller	<input type="checkbox"/>	<input type="checkbox"/>
Branding View or edit customized pages or email templates	<input type="checkbox"/>	<input type="checkbox"/>
Security View or edit user password requirements and other security settings	<input type="checkbox"/>	<input type="checkbox"/>
Single Sign-On View or edit SSO configurations for Zoom account	<input type="checkbox"/>	<input type="checkbox"/>
Integration Integrations are moving to App Marketplace	<input type="checkbox"/>	<input type="checkbox"/>
Marketplace Manage and install Marketplace apps for the Zoom account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. In the **Role Members** tab, click on the **Add Members** button to add users to this role for using VetLinkSQL Telemedicine feature.

< Back to Roles

Developer

Role Settings Role Members

Search All Types + Add Members

Email/Name ID First Name Last Name Type

6. Please email those Zoom User IDs to CFL.

Online Booking Portal Setup

1. On the admin site, under the **Defaults** tab, there is a new option called **Enabled Appointment Type**. This allows you to decide what appointment type clients can book:

- In-clinic Appointment
- Standard Consult
- Both

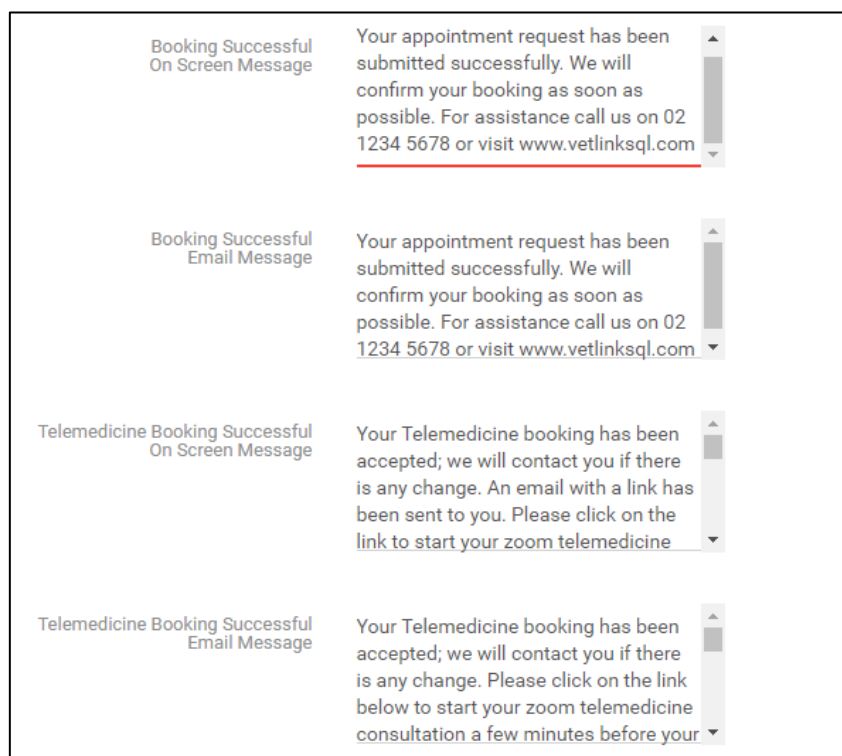


The screenshot shows a form with three fields: 'Enabled Appointment Type' (set to 'Both'), 'Allow staff selection' (empty), and 'Multiply Time for Multi Patients' (set to 'No'). A red arrow points to the 'Enabled Appointment Type' dropdown menu, which is open, showing options: 'Standard Appointment', 'Telemedicine Consult', and 'Both' (highlighted in blue). Below the form, it says 'Only available for VetLinkSQL version 5.1M or above'.

2. Further down the screen, the **Booking Successful** message has been split into four options:

- Booking Successful On Screen Message
- Booking Successful Email Message
- Telemedicine Booking Successful On Screen Message
- Telemedicine Booking Successful Email Message

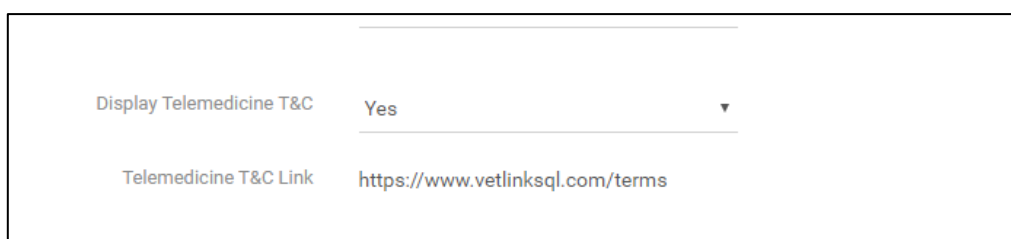
Alter the message depending on what information you want to give your clients.



The screenshot shows four message options, each with a text area for the message content and a dropdown arrow:

- Booking Successful On Screen Message:** Your appointment request has been submitted successfully. We will confirm your booking as soon as possible. For assistance call us on 02 1234 5678 or visit www.vetlinksql.com
- Booking Successful Email Message:** Your appointment request has been submitted successfully. We will confirm your booking as soon as possible. For assistance call us on 02 1234 5678 or visit www.vetlinksql.com
- Telemedicine Booking Successful On Screen Message:** Your Telemedicine booking has been accepted; we will contact you if there is any change. An email with a link has been sent to you. Please click on the link to start your zoom telemedicine
- Telemedicine Booking Successful Email Message:** Your Telemedicine booking has been accepted; we will contact you if there is any change. Please click on the link below to start your zoom telemedicine consultation a few minutes before your

3. Further down the screen you can choose to have a link to Terms and conditions. This can be a link to your website where all the terms and conditions for the telemedicine consult can be displayed. The client will then have to tick to confirm the T & C's before continuing.



The screenshot shows two fields: 'Display Telemedicine T&C' (set to 'Yes') and 'Telemedicine T&C Link' (set to <https://www.vetlinksql.com/terms>).

4. On the **Services** tab, the new appointment type option has been added and will appear when you click on the **Edit** button. This will allow you to choose which services enabled for online booking will be restricted to **Standard** only, **Telemedicine** only or **Both** e.g. setting the Dental Check service on our demo database to **Standard** means that should a client choose the **Telemedicine** option on the first page, they will not see the **Dental Check** option under the **Services** list.

VetLinkSQL Services

- Consultation
- De-sex
- Dental Check
- Ear Issues
- Fight
- Lump
- Re-Visit
- Remove Sutures
- Skin Check
- Tele-Medicine Consult 15
- Tele-Medicine Consult 30

Online Booking Services

- Consultation
- Dental Check
- Ear Issues
- Re-Visit
- Skin Check
- Tele-Medicine Consult 15
- Tele-Medicine Consult 30**
- V&D
- Vaccination
- Weight Loss
- Wounded

Service Details

Display Name: Tele-Medicine Consult 30

Client Instruction: Please note that all Tele-medicine Consults have to be pre-paid.

Appointment Type: **Telemedicine**

Standard
Telemedicine
Both

5. On the **Block Period** tab, you can now choose whether your staff can be blocked from receiving online bookings from **In-Clinic**, **Telemedicine** or **Both**. This new option can be selected when creating a block out period for the intended staff member.

Block out periods

+ Add a new block period Refresh

Staff	From	To	Appointment Type
Staff: Mr. Goran Smart	From: 10:00 AM	To: 11:00 AM	Appointment Type: Telemedicine

✓ ✕

No records to display.

6. A new tab has been added titled **Tele-Med**. Once your clinic has a Zoom account (please contact our helpdesk for assistance on creating a Zoom account or for any information


regarding), any users you create under that account will appear under the [Tele-Med](#) tab once you have contacted us and integrated your account with VetlinkSQL.

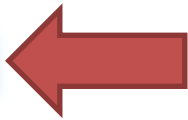
7. Assigning staff to different Zoom users allows your vets to perform consults simultaneously of one another. The more users you make under your Zoom account, the more video consults can be performed at the same time. You may have multiple staff assigned to the same Zoom user, but a Zoom user can run only one meeting at a time, which is why we recommend more than one Zoom user be made under your Zoom account.

Staff Telemedicine Consult Profile

+ Add a new Staff Profile

Refresh

	Staff	Zoom User	
Staff:	Mr. Goran Smart		
Zoom User:	sales@cfl.co.nz		
✓	✗		
	Mr. Goran Smart	sales@cfl.co.nz	✗



VetlinkSQL Telemedicine Setup

Configure Telemed Options in Setup

1. Go to **Options -> Setup -> Diary -> 4: Telemed Options Tab**
2. Tick **Enable Telemed Appointment**
3. Set **Telemed provider**
4. Enter API Key and API Secret from credentials generated when installing JWT app on Zoom.
5. Click **Fetch Users**
6. Select staff member and match to zoom account.

Note: Matching staff to zoom accounts can also be done in the **Staff record | 8:Staff tab**.

Configure Telemedicine appointment reminder messages

1. Go to **Options -> Setup -> Diary -> 1: Diary Options tab**.
2. Set up SMS and Email Telemed messages as required.
3. Close and Save setup.
4. If you have reason based Appointment confirmation messages do following steps.
5. Go to **Options -> Picklists Setup -> Diary -> Diary Reasons**.
6. Select Reason and select Email and SMS tab.
7. Edit the Telemed messages.

Telem User	Staff
sales@cfl.co.nz	
jason@cfl.co.nz	GS - Goran Smart

Allocation and Usage	Value
Use Diary System	<input checked="" type="checkbox"/>
Mths to Keep Diary Records for (1-84)	3
Weeks to Pre-Allocate Diary (1-60)	6
Weeks to Allocate Standing Apts (1-60)	6

Billing	Value
Record Rebooks in Billing	<input type="checkbox"/>
Bill all Reasons for Linked Appointments	<input checked="" type="checkbox"/>

Send Appointments To Clients	Telemed	Standard
Email Appointment Reminder	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Appointment Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Appointment Confirmation	<input type="checkbox"/>	<input type="checkbox"/>
SMS Appointment Reminder	<input type="checkbox"/>	<input type="checkbox"/>
SMS Appointment Notification	<input type="checkbox"/>	<input type="checkbox"/>
SMS Appointment Confirmation	<input type="checkbox"/>	<input type="checkbox"/>

Attaching a Video from Zoom

Check Space Requirements

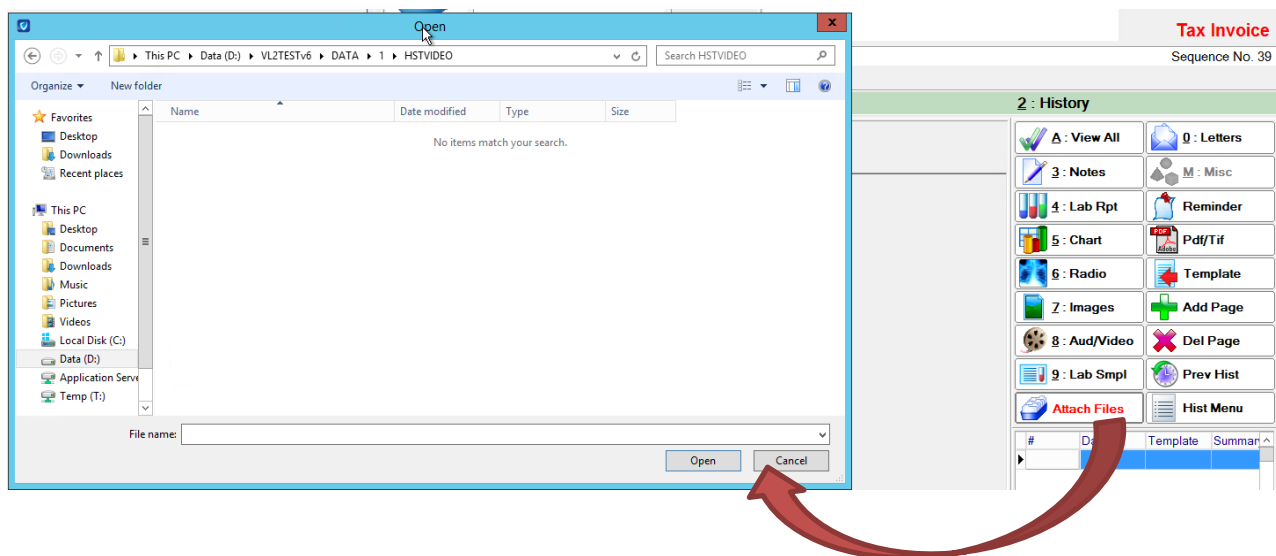
Before attaching any videos in VetlinkSQL you should check if you have sufficient space on your VetlinkSQL drive to store videos. Then based on how big your videos are and how many you will be saving you can do a quick calculation on if you have sufficient space.

To do check if you have sufficient space;

1. Check how big video size is? (a 20 minute zoom meeting is about 30mb)
2. Check how often they plan on adding videos a week?
3. Do rough calculation of how much space will be used over 6 months?
 - a. Eg. 30mb video, adding 10 a week for 6 months = $(30 \times 10) \times 26 = 7.8\text{GB}$
4. Add an extra GB to calculation above and that's how much they will need if they want to save videos.
5. Check how much space is on the D:\ (or whatever your VetlinkSQL drive is) and see if you will have enough space for next 6 months.
6. Contact the network engineer looking after your server if you need more space.
 - a. If using "Vetlink Cloud" email tech@cfl.co.nz to organise more storage space.
 - b. If using Local hardware to host Vetlink email local engineer to organise more storage space.

Attaching via the Clinical History

1. From Clinical History notes
2. Click attach files button
3. Find video file and attach it.



Attaching Video via VL2ATTACH

1. Name file as H+Animal Number. Eg. H1234
2. Copy file to D:\VL2ATTACH folder.
3. File will be automatically **copied to the last open bill** for that animal number. If no open bill exists a new bill will be created.

Appendix 4 - Heska Integration

Configuration of VetlinkSQL

The Heska module is not activated by default. For more information on activating this module please email sales@cfl.co.nz.

Configure Goods & Services

Set up your lab test products to send to Heska. In VetLinkSQL either open an existing item or create a new item.

Set **Label Type** to **Lab Report**.

Set **User Code** to one of the below codes so the test goes to correct analyser.

- **CBC**
- **Chem**
- **Immuno**

Enter other fields such as Name, category, Sell Price, etc as needed. If you wish services to have a cost price you can enable this in setup from **Options | Setup | Product | 1: Options | Allow Services to have cost price**.

Label Type

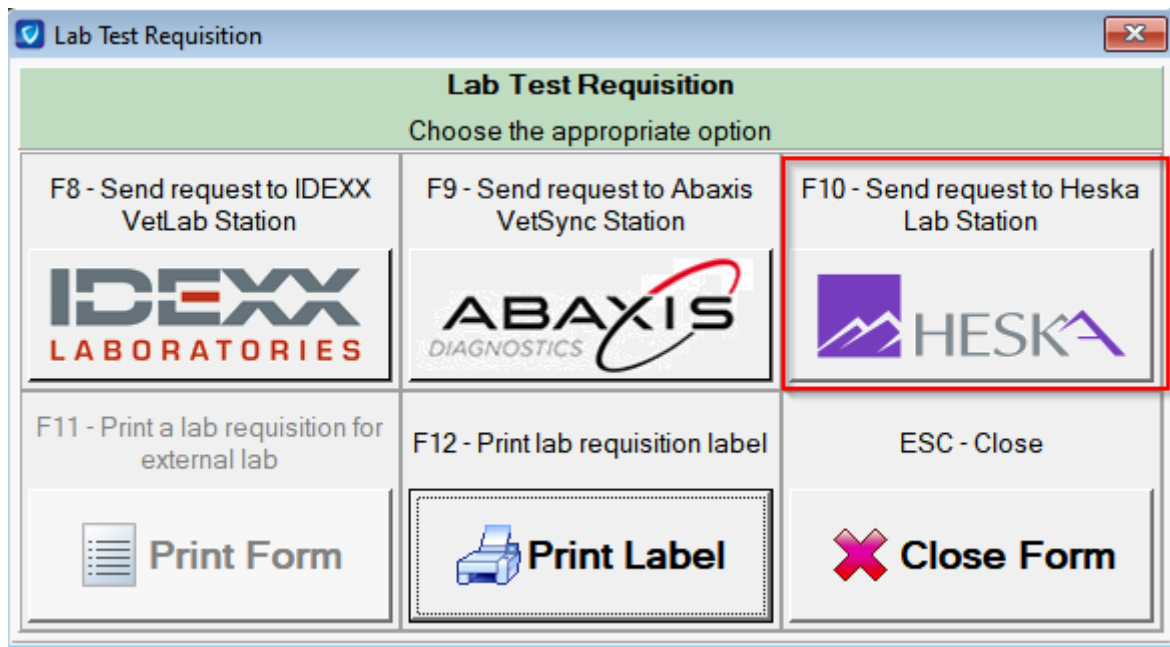
User Code

Multiple Tests with Complex Product

Only one code can be associated with a product. Therefore, if you wanted a product to fire off multiple tests, e.g. Comprehensive Diagnostic and Haematology tests, you would need to create a service complex product. Into this product you would add 2 separate component products.

Performing Test

1. Make a bill as normal
2. Add analyser test to the bill
3. A popup window will appear. Click **Heska** button, It will turn green to indicate test waiting to be sent.
4. Add any other tests.
5. **Save and Exit** bill and all tests will be sent to the analysers to process.
6. Perform tests on the analyser and they will be automatically synced back to the correct visit in VetlinkSQL.



Endorsing New Lab Results

All new lab results imported from Heska will be automatically attached to the clinical history of the animal, if the ref # from the Lab sample label has been entered in the analyser correctly. Results are also placed into the Endorse Labs repository as well.

The Endorse Labs repository is basically area that notifies users a new lab result has arrived in the system. When a report arrives the test tube icon at the top left of VetlinkSQL will start blinking. Users can then just click the icon and check the repository to see if the result is one that they are waiting for.



If the result is one they have been waiting on then;

- If **client and animal it has attached are correct**, then click the **Endorse** button, in bottom right corner to remove it from the list.
- If **client and animal it has attached are incorrect**, because the Ref# from lab sample label was entered incorrectly in the analyser. Then click the **Move** button and select the correct client/animal and visit to link it to.

Appendix 5 – Post Upgrade Notes

To convert the existing bills and client records in VetlinkSQL to invoice based payments the upgrade will automatically pay off the oldest bills and move any credit to the new credit section.

Moving credit on the client record

To move the credit from the owing section to the credit section a transaction will be created on the 1st of the open month with two client adjustment items. One item to move credit out of owing column, and one item to move credit into the Credit column.

These transactions are created as journal entries. So, at the EOM you will see journal entries appear on the control report. This is showing the credit being taken out of the debtors owing balance. It is then moved to the Unallocated credit section to keep things balanced.

1 : Bill

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	ltr
1	OWN	@	1	Client 0 day Adjustment		-\$18.16	-\$18.16					0	0
2	OWN	@	1	Client 90 day Adjustment		\$18.16	\$18.16					0	0
3	OWN	M		Version 6 Conversion								0	0

2 : History

Account Status

Aged

1/09/2019

Inventory Status

StkUpdtd

1/09/2019

TypeS	Amount	Pmt#	Reference	Date

STotal

\$0.00

GST

\$0.00

Total

\$0.00

Due

\$0.00

3 Mth +	\$0.00	Future Bills:	---
2 Mth	\$0.00		\$0.00
1 Mth	\$0.00	Credit	---
Current	\$0.00	\$18.16	
Total	\$0.00	---	
Open	\$0.00	---	
Batched	\$0.00	---	
Total	\$0.00		

Opening Debtors	3,887.63
Less Payments/Credit Applied	-2,550.01
Charges Applied	3,256.48
Journal Ent.	536.28
Less Bad Debt Debtors W/O	0.00
Variances	0.00
Closing Debtors	5,130.36
Unallocated Credit	690.89

Note: The Journal Ent and unallocated credit in control report is for ALL clients.

Note: Clients would have used and added more credit after the upgrade so the journal total probably wont balance against the unallocated credit.

Making Existing bills as Due

During the upgrade VetlinkSQL will need to mark existing bill paid, eg amount due = 0. Therefore you will see transactions created after the upgrade that will pay off existing bills until the appropriate amount of due bills is left owing on the client account.

1 : Bill										2 : History						
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Itm_Scripts	Action_Ans	PmtPrc_On_Bill	Incen
1	OWN	AP		1>Pay Invoice# 1/1365	\$193.41		\$193.41					0	0		Y	
2	OWN	AP		1>Credit Applied	-\$193.41		-\$193.41					0	0		Y	

Account Status	ClinUpdtd
27/08/2020 11:02:06 am	
Inventory Status	StkUpdtd
27/08/2020 11:02:06 am	

TypeS	Amount	Pmt#	Reference	Date

STotal	\$0.00
GST	\$0.00
Total	\$0.00
Due	\$0.00

Undoing Write offs made before the Upgrade

In version 6 when a write off is done it writes off specific bills (marks those bills as not due anymore). In version 5 it just wrote off an amount owing.

So, in version 6 if you do an undo write off it also has to make the specific bill it wrote off due again. However, the old write offs done before the upgrade aren't linked to any bills so there is nothing to mark due again.

Therefore, **write offs done before the upgrade are unable to be undone via the usual method**. Write offs done after the upgrade can be undone the normal way.

To undo write off's from before the upgrade;

1. Create a product with class service called "Undo write off".
2. Do a normal bill for the client and add this item.
3. Change the amount to the write off amount you are undoing
4. Charge it to the account.