

GETTING STARTED

CONTENTS

VetlinkPRO Shortcut Icons	2
Overview of the VETLINKPRO Interface	2
Title Bar.....	3
File Menu	4
Status Bar	5
Notification Icons.....	5
Status Bar Customisation.....	6
Main Button Menu	7
Customising the Main Button Menu.....	9
Work Area	10
Common Toolbar.....	11
Activity Log.....	12

VETLINKPRO SHORTCUT ICONS

The standard icons for the VetlinkPRO shortcuts are listed below.



VetlinkPRO



VetlinkPRO
Setup



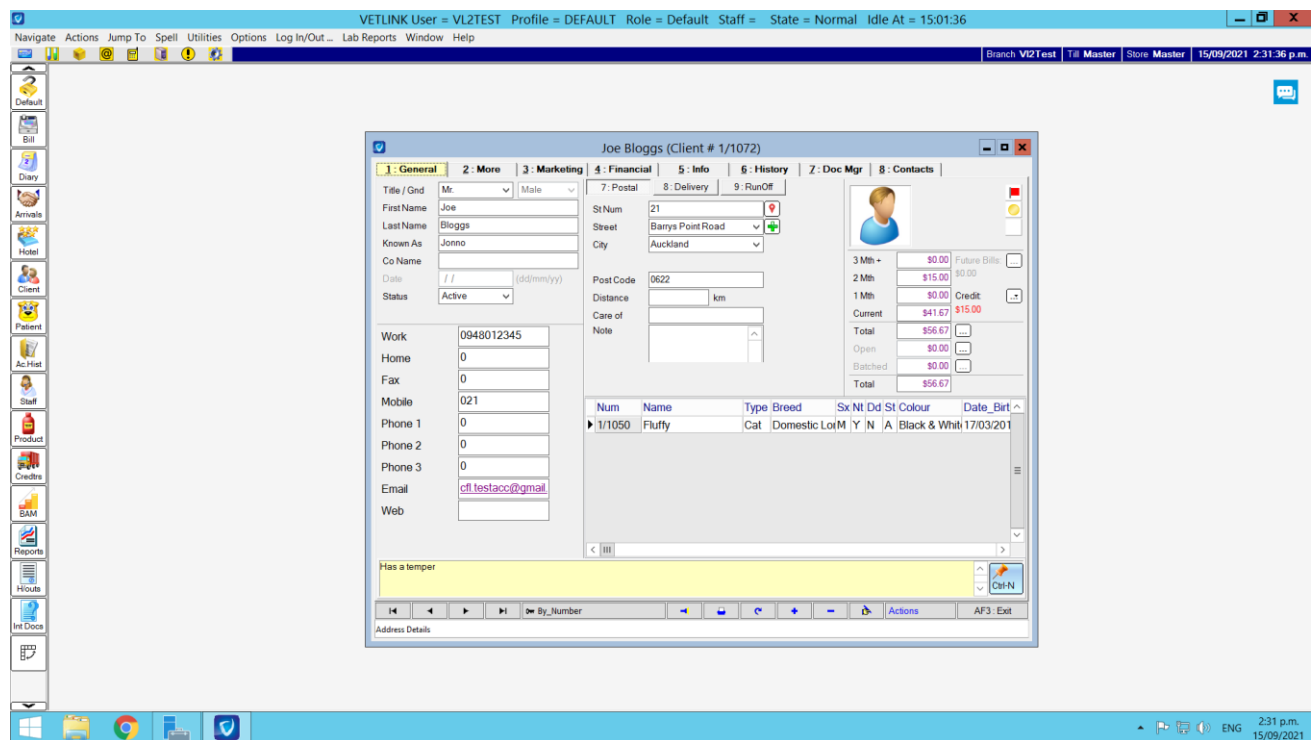
VetlinkPRO Play



VetlinkPRO Play
Setup

OVERVIEW OF THE VETLINKPRO INTERFACE

The VetlinkPRO screen can be broken down into several sections that show the user information about their VetlinkPRO session as well as providing an interface for day to day functionality. The main sections can be broken down to the Title Bar, File Menu, Notification Toolbar, Main Button Menu, Work area and the common toolbar. This chapter will describe each section in detail.



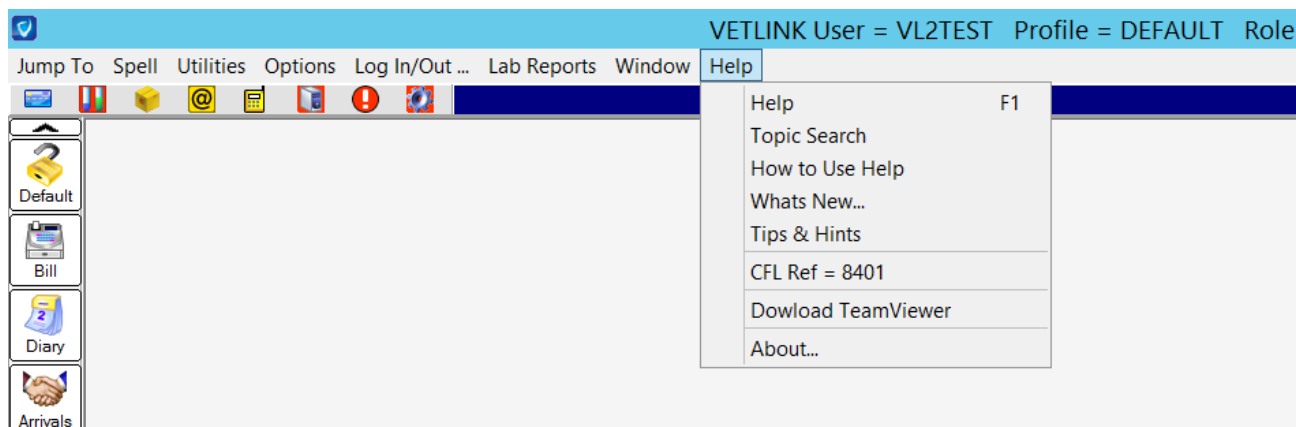
Title Bar

VETLINK User = VL2TEST Profile = DEFAULT Role = Default Staff = State = Normal Idle At = 15:02:50

The **Title Bar** displays six important pieces of information; the User, Profile, Role, Staff ID, State and Idle time.

User	The User is created from the windows user profile that you log on with. Some setup options in VetlinkPRO are saved against this user profile. Therefore each user can behave slightly differently than the next.
Profile	<p>The Profile is a group that the User belongs to. Each Profile has settings that are shared by each member in that group. These mainly apply to the printer settings.</p> <p>For example, you may have two computers and a printer at reception, as well as two computers and a printer in the back office. The front two computers may use a Profile called 'Front' which directs printing to the printer at 'Reception'. The back two computers may use a Profile called 'Back' which directs printing to the printer at the back office. If the printer is replaced at Reception, the printer settings in VetlinkPRO only need to be updated in one location which will update all two computers automatically.</p>
Role	VetlinkPRO has been designed so an administrator can assign users to a Role . Each Role will be able to access certain areas of the application as determined by the administrator. For example, Junior Staff members can be excluded from accessing financial reports.
Staff ID	The Staff is the current staff ID logged into VetlinkPRO
State	
Idle At	The Idle time is when the current staff member will be logged out of VetlinkPRO if the computer is left idle.

File Menu



The file menu provides access to some of the less commonly used areas of VetlinkPRO. To open a menu single left click on the menu name and a drop down list will open. Depending on the window you currently have open in the Work Area, the menus available may change. For example, when a client record is open an **'Actions'** menu will appear.

Jump To	The 'Jump To' file menu is used for fast keyboard navigation to the areas listed in the 'Main Button Menu' . For example, pressing 'ALT+J' (to activate the Jump to menu) then 'B' will take you to the billing menu.
Utilities	The 'Utilities' file menu is where you will find the program utilities. One of the most important utilities is the End of Period utility; this is where the End of Day, End of Month and End of Year functions are located.
Options	The 'Options' file menu is where the setup options for the application are found.
Log In / Out	The 'Log in/Out' menu option will open the Password Control window. This enables you to log in or out of areas of the program that have been restricted.
Lab Reports	The 'Lab Reports' menu will show all new incoming lab reports emailed from a Lab or sent from an IDEXX workstation.
Window	The 'Window' menu option is where you can arrange the windows you have open by tiling, cascading them or even closing them en masse. This menu will also list all the windows you have open in VetlinkPRO at any one time.
Help	The 'Help' menu lists all functionality that will assist users to run VetlinkPRO.
Navigate	The 'Navigate' menu option is used to navigate through records. The Navigate window is only available when certain windows are open, for example the Arrivals window.
Actions	The 'Actions' menu will only appear when certain windows are open and active. The 'Actions' menu will only display options that are relevant to the current window that is open.

Status Bar

The Status Bar provides a go-to area for all alerts and things that need your attention. The Status Bar has now been cut into three sections and is displayed at the top by default.



Left - Icons: (Notification Icons)

This shows the status of some important portions of the application as they change in the background or due to other users.

Middle - Text:

This shows messages for important events.









Right - Panels:

This shows things like current date and time, current store and till etc. Clicking on a panel allows you to change that item.

Notification Icons

The Status Bar has seven icons that will quickly let you know if something needs attention in VetlinkPRO. By default the icons are Yellow, when one of them requires your attention they change colour to Red and start blinking.

Clicking on the icon will view the information needing attention and also signals to the program that you are attending to it so the icon will stop flashing and turn back to Yellow, letting other staff members know that it is being taken care of. The icon will turn back to red and start blinking again if anything new needs attention.

	Recurring invoices that need posting.
	A new Lab Report has arrived by email and needs to be endorsed
	Stock Take is currently in progress at your store.
	A new Email message has arrived. Not implemented.
	A new SMS reply has arrived.
	Background has posted a serious error.
	A transaction is in error, this includes bills, invoices, documents etc.
	Indicates whether the Background Processor is running.

Status Bar Customisation

The status bar can be customised to your own preference, to customise it simply right-click any icon on the bar and it will bring up the setup menu. Please note that these settings are saved for that workstation only.

Position:	Defines where the Status Bar will reside, the options are top and bottom.
Appearance:	Controls the style of the Status Bar.
Colour Scheme:	Determines the colour of the Status Bar. Note the Icon Panel becomes grey for some of the colours. This is because the icons do not stand out in those Colour Schemes.
Icon Blinking:	This controls how fast the icons will blink when requiring attention. If you are using Terminal Services and find that the blinking slows down the responsiveness of the screen, then you should turn the blinking off.
Icon Refresh:	This determines how often the VetlinkPRO will check to see if anything new requires attention. It is strongly recommended that you DO NOT turn off the update unless there are other users that are dedicated to handling the icons. The recommended setting is every 3 seconds.

Main Button Menu



The Main Button Toolbar is where users can access the most commonly used functions in the system. Each buttons function is listed in the table below.

	The 'Padlock' button is your login icon; it is used to access areas that have been set up by management as restricted, or to perform special functions in the system. The button changes its appearance once someone has logged in. The characters at the top of the button refer to the user who is logged in, while the characters on the bottom of the button refer to the access level that has been granted to that user.
	The 'Billing' menu is used to process financial transactions for clients. (For more information on the billing menu see chapter on Billing)
	The 'Diary' menu button is used to access the appointment book / Diary where you can create, view or edit appointments for clients.
	The 'Arrivals' menu button is used to access the client arrivals screen which shows clients who are due, who have arrived and for how long clients have been waiting.
	The 'Hotel' button is used to access the Hotel diary. This is an optional module. If you wish to make this module active, please contact CFL at sales@cfl.co.nz .
	The 'Client' menu button is used to access client records. The client record is where all client related information is found. (For more information on the client menu see the chapter on client management).
	The 'Animal' menu button is used to access animal records. The animal record is where all animal related information is found. (For more information on the animal menu see the chapter on animal management).
	The 'Ac. Hist' (Account History) menu button is used for looking up all the transaction history. The account history screen contains every client transaction ever created in the system including all bills and refunds.
	The 'Staff' menu button is used to access staff records. The staff records include personal details, contact information, rosters and sales and purchase history.



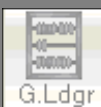
Product

The **'Product'** button is used to access the goods and services file. From the product screen you can add and edit products and services.



Credtrs

The **'Creditors'** menu gives access to the ordering / invoicing module, this is where most inventory control is handled.



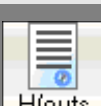
G.Ldgr

The **'G.Ldgr'** (General Ledger) menu button is used to access the general ledger module. This is an optional module. If you wish to make this module active, please contact CFL at sales@cfl.co.nz



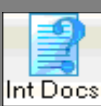
Reports

The **'Reports'** menu button is used to access the reporting and marketing module.



H/outs

The **'H/outs'** button is used to access any documents you have created and stored in the handouts folder. For example, you can store any information that you need to provide to clients such as post-surgery care sheets or advice on caring for an animal with a particular disease.



Int Docs

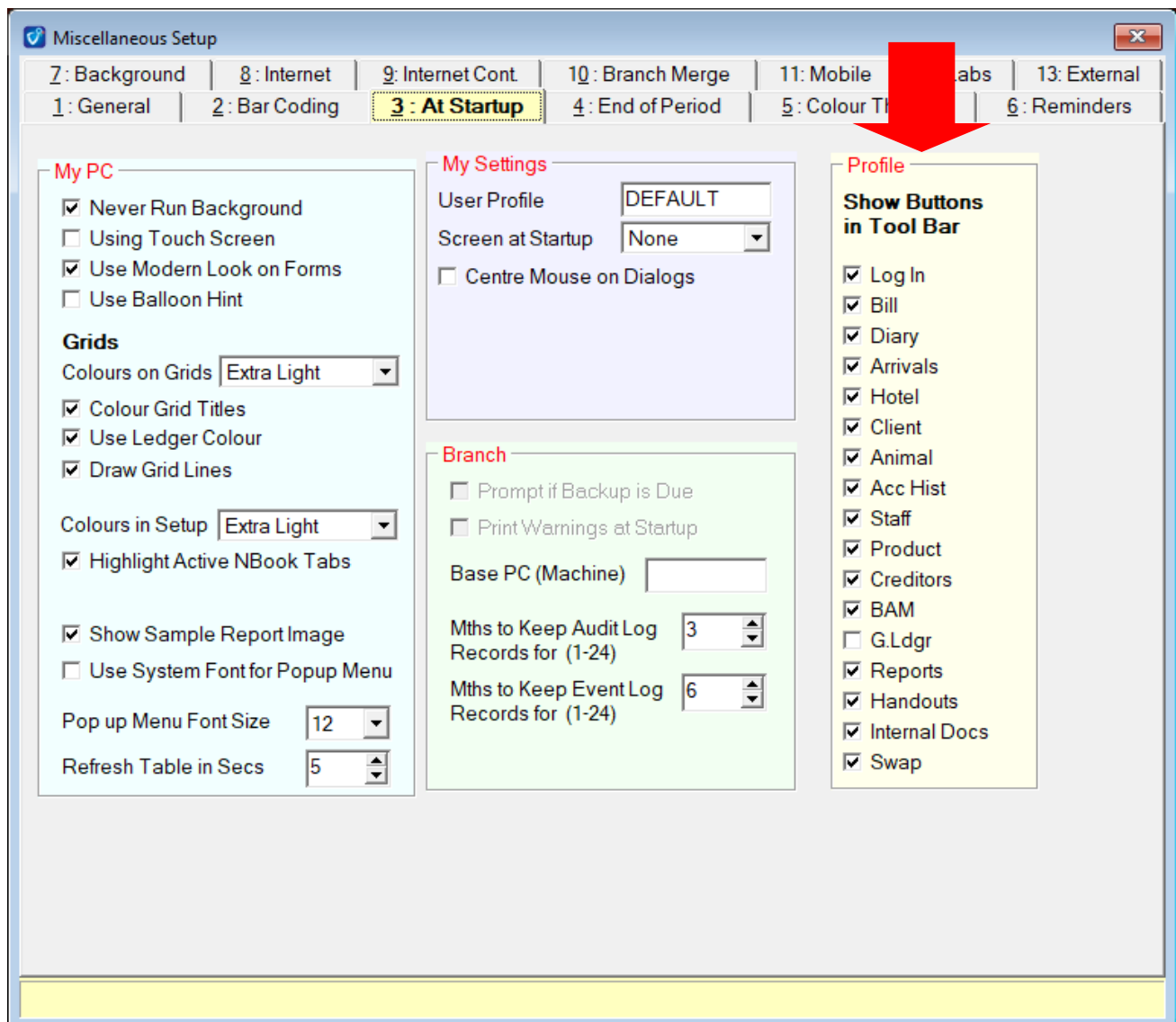
The **'Int Doc'** button is used to access any documents you have created and stored in the internal documents folder. For example, any instructions or information that is used internally.



The **'Orientation'** button changes the position of the **'Main Button Toolbar'**. By default the toolbar will display vertically along the left hand side of the page, clicking the **'Orientation'** button will change the position to horizontal across the top of the page.

Customising the Main Button Menu

You can customise which buttons you want to display on the Main Button Toolbar from **Options -> Setup -> Misc -> At Startup -> Show Buttons in Tool Bar**. From here you just need to tick the buttons that you wish to appear in the menu toolbar. These settings are user based so each user can have different buttons showing on the toolbar. This is great for removing clutter from the toolbar restricting access to areas of the application. E.g. The computer in the storage room might solely be used for receipting and ordering stock and staff members in this area may not have the authority to make bills. In this scenario you can remove buttons, like the bills button, that are not applicable to operations in this area.

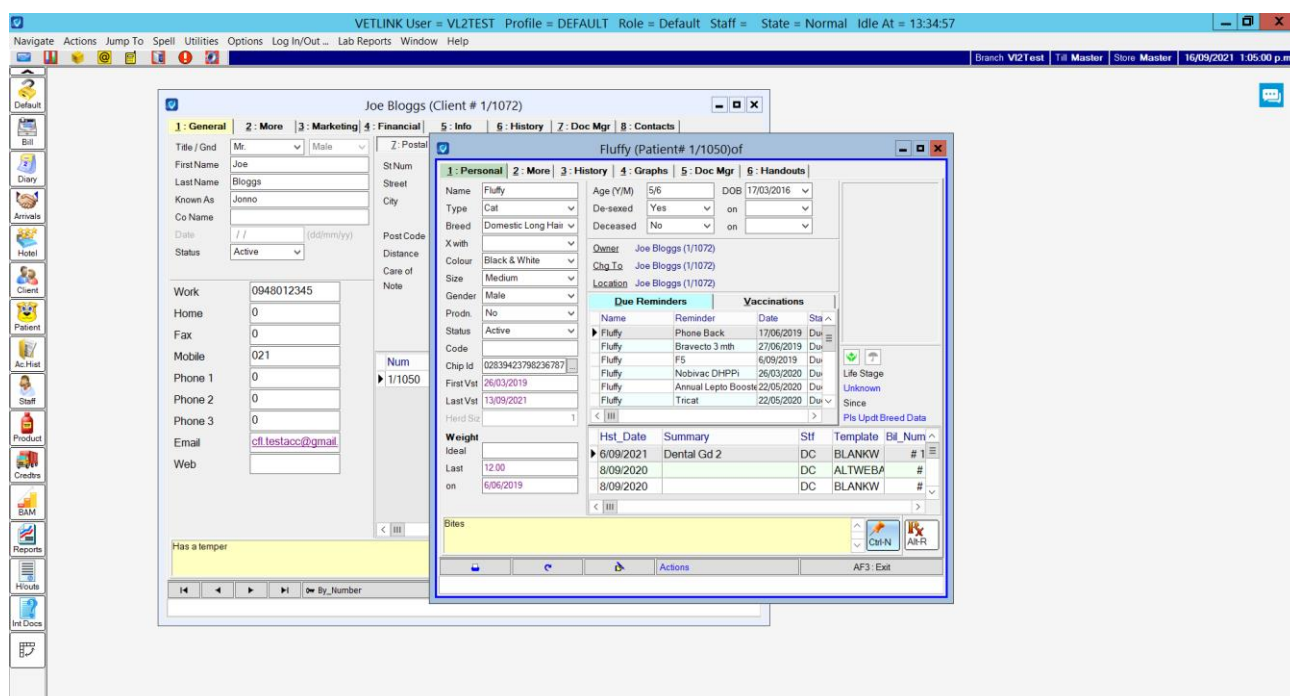


Work Area

The **'Work Area'** is where windows are opened and the day to day procedures performed in VetlinkPRO take place.

The Work Area uses MDI technology. MDI (Multiple Document Interface), technology allows the user to work on an unlimited number of windows at the same time on screen. Unlike legacy applications where you have to close a task window to perform another task or have a limit of open windows, this technology allows virtually an unlimited number of multiple windows to be open at the same time on-screen.

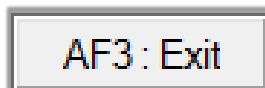
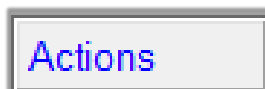
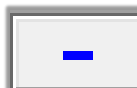
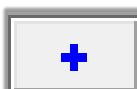
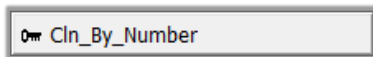
For example, you could be viewing an animal's history when another client calls and asks when their next appointment is. With MDI technology you can leave the animal history open and also open the diary to check for the client's next appointment. Once the appointment has been you can close the diary the animal history will still be in the position you left it.



TIP: The **'Windows'** menu has many functions that help manage the work area when multiple windows are open. It lists all current windows that are open as well as providing an option to close all windows at once if the work space has become too cluttered.

Common Toolbar

The common toolbar is usually displayed on product, client, animal and supplier records as well as bills, creditor orders, invoices and payments. Each type of record will display different buttons that provide different functionality to that record; the common buttons are displayed below.



Scroll Buttons: These buttons enable you to scroll from record to record in the direction shown by the arrow. The arrows with the lines on the end will scroll directly to the first and last records respectively. The scroll order is based on the scroll mode as outlined below.

Scroll Mode: This is the order in which you are currently scrolling through the database. By clicking on this button you can change the scroll mode to a different order. For example on the client record you can scroll through the records in Category 1 or 2 order, company name order, first or last name order, client number or user code number order.

Search: This button will open a new search window to find another record

Print: This button will open a Print Menu that allows you to print forms and reports specific to this record

Refresh: This button refreshes the record on your screen, to show any changes if someone else has modified the record while you are viewing it.

Add: This button will open a new record, ready for you to create a new record quickly.

Not Applicable.

Edit: This button will allow you to edit or make changes to the record that you have on your screen. This is controlled by a setup options, most clinics will be able to edit records without clicking on this button.

Actions: This button brings up a list of extra functions that are unique to the record that you are opening.

Exit: This button will close the window that you have open.

ACTIVITY LOG

An Activity log is available on most records in VetlinkPRO. The activity log will record events so you can go back and see an audit trail of why the record has changed. For example if a client record has been made inactive you can open the activity log for the client and see the date, time, computer, etc... that made the change. The activity log is available by going to a record then selecting the **Actions** button then **View Activity log**. From an appointment you can right click on the appointment and select **View Activity log**.

Type	Entity Name	Mst_Ref	Action	What	Old Value	New Value	When	Who	Win User	Machine	App	Branch	Company	Ref_Number
Diary	Small Animal	# 1/28028	Modified	Dry_Num	Web Appointment	Small Animal	16/11/2018 9:34:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012253
Diary	Small Animal	# 1/28028	Modified	Date	9/11/2018	16/11/2018	16/11/2018 9:34:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012254
Diary	Small Animal	# 1/28028	Modified	Start	8:00 AM	10:00 AM	16/11/2018 9:34:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012255
Diary	Small Animal	# 1/28028	Modified	Finish	8:15 AM	10:15 AM	16/11/2018 9:34:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012256
Diary	Small Animal	# 1/28028	Modified	Finish	10:15 AM	10:30 AM	16/11/2018 9:34:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012257
Diary	Holding Tank	# 1/28028	Modified	Dry_Num	Small Animal	Holding Tank	16/11/2018 9:35:03 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012258
Diary	Small Animal	# 1/28028	Modified	Dry_Num	Holding Tank	Small Animal	16/11/2018 9:35:07 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012259
Diary	Small Animal	# 1/28028	Modified	Date	16/11/2018	17/11/2018	16/11/2018 9:35:07 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012260
Diary	Small Animal	# 1/28028	Modified	Start	10:00 AM	11:00 AM	16/11/2018 9:35:07 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012261
Diary	Small Animal	# 1/28028	Modified	Finish	10:30 AM	11:30 AM	16/11/2018 9:35:07 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012262

Activity Log for appointment changes

Type	Entity Name	Mst_Ref	Action	What	Old Value	New Value	When	Who	Win User	Machine	App	Branch	Company	Ref_Number
Bill Main	Tax Receipt	# 1/2085	Added	Type		Tax Receipt	16/11/2018 9:37:06 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012270
Bill Main	Tax Receipt	# 1/2085	Added	Cln_Ref		John Smith	16/11/2018 9:37:06 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012271
Bill Items	For Chase	# 1/2085	Added	Itm_Qty		0.00000	16/11/2018 9:37:07 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012272
Bill Main	Tax Receipt	# 1/2085	Modified	Acc_State	Open	InDiary	16/11/2018 9:37:08 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012273
Bill Items	Advantage Per Vial Dog >25k	# 1/2085	Added	Itm_Qty		1.00000	16/11/2018 9:37:49 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012275
Bill Items	Advantage Dogs over 25kg	# 1/2085	Added	Itm_Qty		0.25000	16/11/2018 9:37:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012276
Bill Items	Dispensing Fee 5	# 1/2085	Added	Itm_Qty		1.00000	16/11/2018 9:37:50 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012277
Bill Items	Advantage Per Vial Dog >25k	# 1/2085	Modified	Itm_Qty	1.00000	2.00000	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012278
Bill Items	Advantage Per Vial Dog >25k	# 1/2085	Modified	Itm_Sell	9.370	18.740	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012279
Bill Items	Advantage Per Vial Dog >25k	# 1/2085	Modified	Itm_Sell	18.740	18.750	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012280
Bill Items	Advantage Dogs over 25kg	# 1/2085	Modified	Itm_Qty	0.25000	0.50000	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012281
Bill Items	Advantage Dogs over 25kg	# 1/2085	Modified	Itm_Sell	17.010	17.020	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012282
Bill Items	Dispensing Fee 5	# 1/2085	Modified	Itm_Qty	1.00000	2.00000	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012283
Bill Items	Advantage Dogs over 25kg	# 1/2085	Modified	Itm_Sell	17.020	17.010	16/11/2018 9:37:56 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012284
Bill Items	Cat Hospital	# 1/2085	Added	Itm_Qty		1.00000	16/11/2018 9:38:18 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012285
Bill Items	Cat Hospital	# 1/2085	Deleted	Itm_Qty	1.00000		16/11/2018 9:38:22 AM	*SUP*	KIERAN	KD	Main Appli:	1	1	10000012286

Activity Log for bill changes