

THE NOTES SYSTEM

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OVERVIEW

The notes system is used to display pop-up or printed notes at various user defined stages in VetlinkPRO. For example, you can automate the system to display a note when a certain product is added to a bill or when a bill is made for a particular client. These notes may be prompts to advise of product specials or important information a staff member needs to know about a client while billing or making an appointment. Notes can be added for patients, clients, products, staff members and suppliers. The process for adding these reminders however is the same throughout the program.

PRECONFIGURED NOTES

Preconfigured notes are notes with pre-set behaviour and are available from the Patient, Client, Product, Supplier or Staff record forms.

Simple Note

Simple Notes display in the yellow information screen at the bottom of the client, product, staff member or supplier records. These notes will only display when you open the record for a client, product, staff member or supplier.

Bloggs Joe (Client # 1/6843)

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

Title / Gnd Dr. Male

Last Name Bloggs

First Name Joe

Known As Joey

Co Name

Date / / (dd/mm/yy)

Status Active

Work

Home 094882280

Fax

Mobile 021 0316899

Phone 1

Phone 2

Phone 3

Email support@cfl.co.nz

Web

7 : Postal 8 : Delivery 9 : RunOff

St Num 21

Street Barrys Point Road

Suburb Takapuna

City Auckland

Post Code 0622

Distance 23 km

Care of

Note 2nd driveway on left

3 Mth + \$0.00 Future Bills: \$0.00

2 Mth \$0.00

1 Mth \$0.00

Current \$0.00

Total \$0.00

Open \$0.00

Batched \$0.00

Total \$0.00

Num	Name	Type	Breed	Sx	Nt	Dd	St	Colour	Date_Birth	ID
1/17661	Bree	Dog	Unknown	?	N	N	A		1/01/1980	
1/17663	Dog	Dog	Unknown	?	N	N	A		1/01/1980	
1/33304	Fred	Dog	Kelpie	M	Y	N	A	Red	25/08/2010	E87
1/38891	Kirra	Dog	Staffordshire	F	N	N	A	Black Brindle	18/01/2004	
1/36439	Cockateil	Bird	Unknown	?	N	N	I			
1/17662	Snoopy	Cat	Dsh	F	N	N	I	Tabby	1/01/1990	

Do not charge to account!

Contact Details

Print on History

A **'Print on History'** note will print out at the bottom of an patients printed history. This is useful if you print out the previous histories for patients before they come in for their appointment. You can have a warning at the bottom of the history stating any allergies to products they might have.

Print on Bill

A **'Print on Bill'** note will print out at the bottom of the tax receipt. An example of a 'Print on Bill' note is for when a product has instruction for its use which you need to automatically print out. It is best to use Product Handouts if this is going to be more than a sentence or two.

Show on Diary

A **'Show on Diary'** note displays in the yellow panel underneath the client or patient name in the appointment confirmation form.

Appointment Details - Consult - Wednesday 23 May 2018

Client

Bloggs Joe

...

Subject

Fred [MN] Dog, Kelpie, Red (7/9 yr) [LAS]

...

Do not charge to account! Do NOT charge to account

Does not like being put on consult table

Reasons

Consult

Details

23 Barrys Point Road, Takapuna, Auckland, 0622

Staff

LAS - Simpson Lisa

Prf Staff(s)

Req Staff

Start & End Time

5:10 PM

5:25 PM

Duration

00:15

Phone Nos

51411651(H) - Ho

021 0316899(M) - I

Address

23 Barrys Point Road

Takapuna

Auckland 0622

F2: Change

90 Days

\$0.00

60 Days

\$0.00

30 Days

\$0.00

Current

\$0.00

Total

\$0.00

Open

\$534.69

Batched

\$0.00

Total

\$534.69

When	Duration	Finish	Stf	Subject
5:10 PM	00:15	5:25 PM	LAS	Fred

Due Reminders

Vaccinations

ESC: Cancel

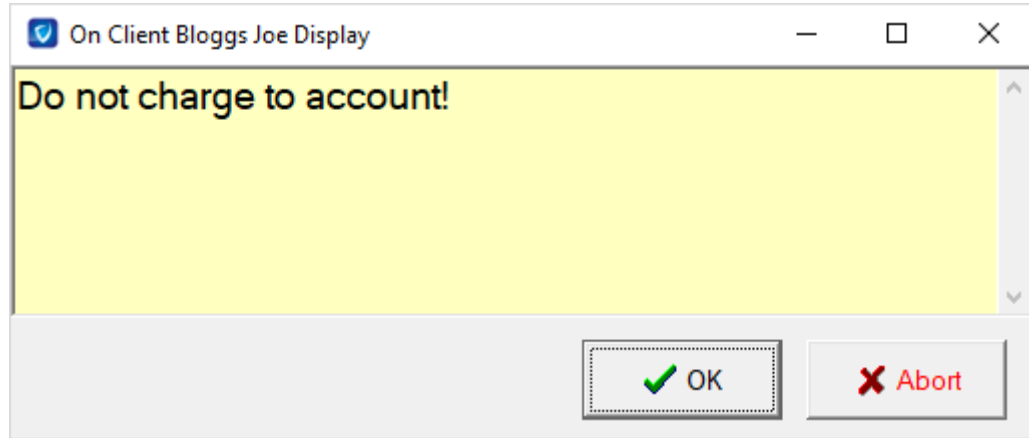
Ctrl+S: Stand Apt

F11: Repeat

F12: Finish

Show on Bill

A **'Show on Bill'** note is a pop up note that will pop-up when either a client, patient or product is added to a bill, depending on where the note is set.



Show on Order

A **'Show on Order'** note is a pop up note that will pop-up when either a product or supplier is added to an order, depending on where the note is set.

Show on Inw Goods

A **'Show on Inw Goods'** note is a pop up note that will pop-up when either a product or supplier is added to an invoice, depending on where the note is set.

How to Set up Preconfigured Notes

1. Open the patient, client, product, staff member or supplier record that you wish to add a note to.
2. Next click on the **'Ctrl+N'** button in the bottom right hand corner of the screen.
3. From the pop-up menu click on the type of preconfigured note you wish to add.
4. This will bring up the **'Create New Message'** screen.
5. Enter the note and click the **'F12: Save'** button.

USER DEFINED NOTES (ADVANCED NOTES)

Advanced notes allow you to create a note and select where you would like this to appear in VetlinkPRO. For example, a certain product may have instructions for use which need to be given to the customer. Using advanced notes you can automatically print the instructions out at the bottom of the receipt every time that product is used on a bill.

Setting Up a New Advanced Note

1. Search for and open the client, patient, product, staff or supplier record you wish to add an advanced note to.
2. Click on the **'Ctrl-N'** button in the bottom right hand corner of the record and choose **'Advanced Notes'**.
3. The advanced notes form will open, click on the **'+'** button.

Msg_Num	Msg_Name
# 1/15665	C100000068431
# 1/15675	C100000068432
# 1/15676	C100000067801

Name: C100000067801

Message / Notes: **Joe is a bad debtor. DO NOT CHARGE TO ACCOUNT.**

Actions:

<input type="checkbox"/> Show on Rec Display	<input type="checkbox"/> Print on Rec Display
<input type="checkbox"/> Popup on Rec Edit	<input type="checkbox"/> Print on Rec Edit
<input type="checkbox"/> Popup on Rec Delete	<input type="checkbox"/> Print on Rec Delete
<input checked="" type="checkbox"/> Popup on Rec Display	<input type="checkbox"/> Print on Bill
<input type="checkbox"/> Show on Bill Tab	<input type="checkbox"/> Print on Statement
<input checked="" type="checkbox"/> Popup at Billing	<input type="checkbox"/> Print as Bill Items
<input type="checkbox"/> Show on History Tab	<input type="checkbox"/> Print on Order
<input type="checkbox"/> Popup at Order	<input type="checkbox"/> Print on Inward Goods
<input type="checkbox"/> Popup at Inward Goods	<input type="checkbox"/> Print at Stock Take
<input type="checkbox"/> Popup at Stock Take	<input type="checkbox"/> Print on Appointment
<input checked="" type="checkbox"/> Show on Appointment	<input type="checkbox"/> Print on Arrival
<input type="checkbox"/> Popup on Arrival-Billing	<input type="checkbox"/> Print on History
<input type="checkbox"/> Popup at Appointment	<input type="checkbox"/> Log on Billing
<input type="checkbox"/> Popup on Arrival/Admit	<input type="checkbox"/> Log on Order
<input type="checkbox"/> Print on Prescription	<input type="checkbox"/> To Web

Purple Items for future use

Determine when the message will show, print or log

4. The advanced note search form will open, click on the **'F7: New'** button.
5. The **'Create New Message'** form will now open.
6. Enter a name for the note and type up the note you wish to add.

7. If you wish this note to be available for use on other patient, client, staff, product or supplier records set **'Shared'** to **'Yes'**.



TIP: You can add mailmerge variables to the note by clicking on the **'F11: Mailmerge'** button. This is useful for generic notes where you wish to show client, patient or product specific details. For example, a print on bill note can have mail merge variables of the first and last name of the client. When the receipt prints the client's name that was used for the bill will be merged into the note in place of the mail merge variables.

8. Once the note has been finished click on **'F12: Save'**.
9. You will be taken back to the advanced notes form.
10. Single left click on the note you have just added the text will display in the top right panel of the screen. The bottom right hand panel is a list of check boxes that govern where the note will show in VetlinkPRO.

11. Check the boxes where you want the note to display and then click on the tick button to save.



NOTE: Depending on what screen the actions are viewed from some of the actions may not be available. Actions in purple or that are greyed out are not available.

Actions

Show on Rec Display:	Displays the note in the yellow panel at the bottom of the record..
Popup on Rec Edit:	Displays a note when the record is being edited.
Popup on Rec Delete:	Displays a note when the record is being deleted.
Popup at Billing:	This will pop-up the note when a bill is created with a particular record on it.
Popup on Rec Display:	This note will popup when the client record is opened.
Popup at Order:	This will pop up a message on the order screen when loading a record onto an order.
Popup at Inwards Goods:	This will pop up the message when loading a record onto an invoice.
Popup at Stocktake:	This will pop up a message on the stocktake screen
Popup at Appointment:	This will display a note in the appointment details screen.
Popup at arrival:	This will pop-up a message when the client arrives.
Log on Billing:	This will Log the message on billing.
To Web:	Not yet implemented.
Print on Rec Display:	Not yet implemented.
Print on Rec Edit:	Prints the note on the record when edited.
Print on Rec Delete:	Prints on the record when deleted.
Print on Bill:	Prints out the note on a bill
Print on Statement:	Prints out the note on a statement
Print on order:	Not yet implemented.
Print on inwards goods:	Not yet implemented.
Print on stocktake:	This will print out a note with the stocktake.
Print on Appointment:	Not yet implemented.
Show on arrival:	Not yet implemented.
Log on order:	The note will be logged on the order.
Print on history:	The note will print on the client visit history notes.

Adding an Existing Advanced Note

1. Search for and open the client, patient, product, staff or supplier record you wish to add an advanced note to.
2. Click on the **'Ctrl-N'** button in the bottom right hand corner of the record and choose advanced notes.
3. The advanced notes form will open.
4. Click on the **'+'** button.
5. Type in the first few letters of the note you wish to add and click on search.
6. Select the note you wish to add and click on **'Accept'**.
7. You will be taken back to the advanced notes form.
8. Single left click on the note you have just added the text will display in the top right panel of the screen. The bottom right hand panel is a list of check boxes that govern where the note will show in VetlinkPRO.
9. Check the boxes where you want the note to display and then click on the tick button to save.