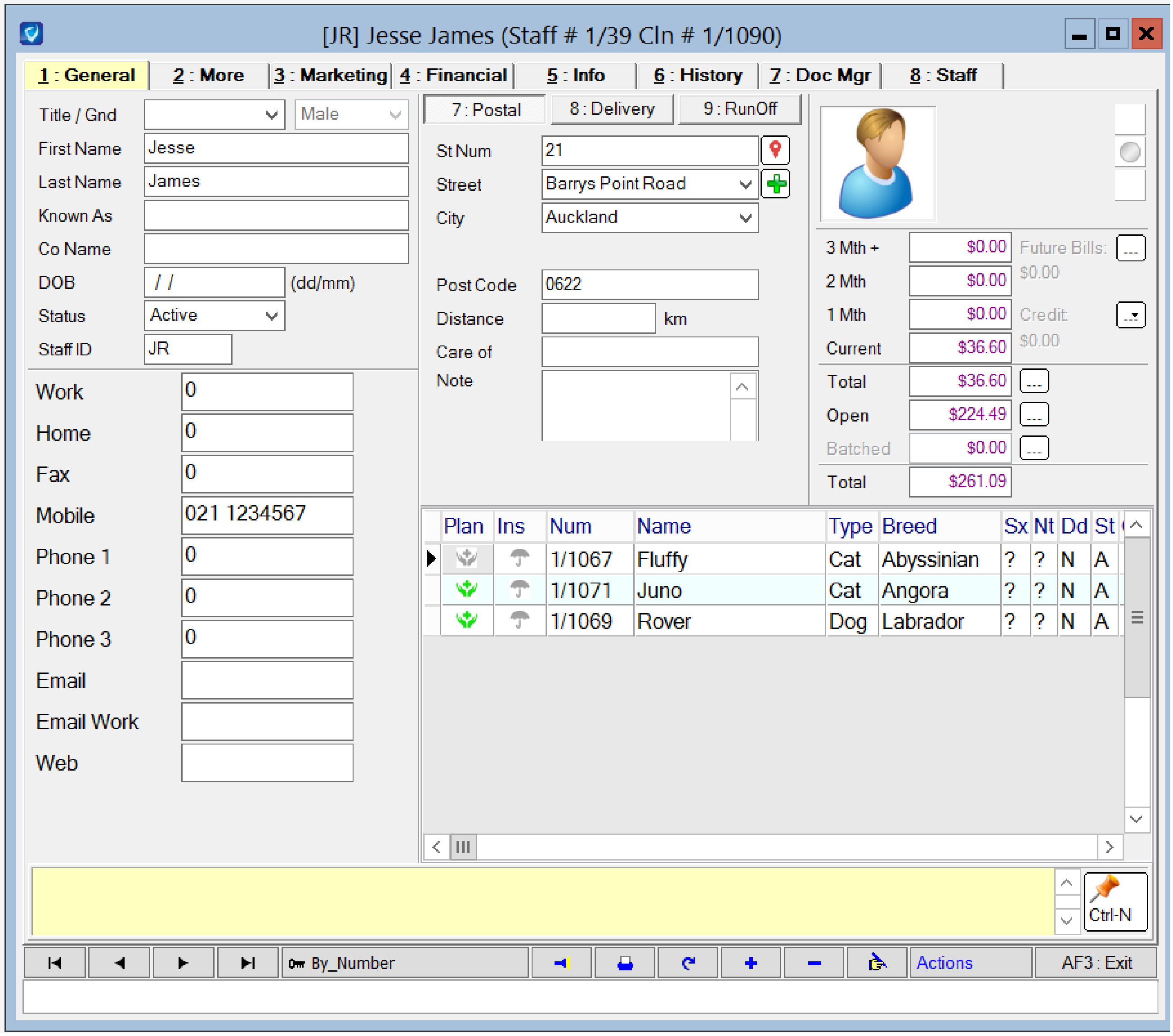
STAFF MANAGEMENT

CONTENTS

OVERVIEW

The staff records are used primarily to hold staff details, preferences and other attributes. It is also a centralised point for transaction lookup and for timetable changes.

As a staff record is linked to a client record, most of the tabs are identical to the client record apart from the **'History'** tab and **'Staff'** tab, these show sales history rather than purchase history and roster management respectively.



How to Enter New Staff Members

Staff member's records are linked to client records. To add a new staff member, the client must be created first. The client information is then transferred across to the new staff record. To add a new staff record, follow the steps below.

1. Create the client record for the new staff member.

2. Click on the **'Staff'** button

3. The staff search form will now be displayed. Click on the **'New'** button.

4. Click on **'OK'** to insert a new staff record.

5. A client search form will now be displayed. Search for the client you wish to enter as a staff member.

6. A new staff record will now be created. The staff record will be automatically populated with details from the selected client.

7. Enter the staff ID. This must be unique to this staff member, and at least two characters long but no longer than five. We usually suggest the staff members' initials are used for the staff id, but you can use any system you prefer.

8. Save the Staff record by clicking on the tick in the bottom right hand corner.

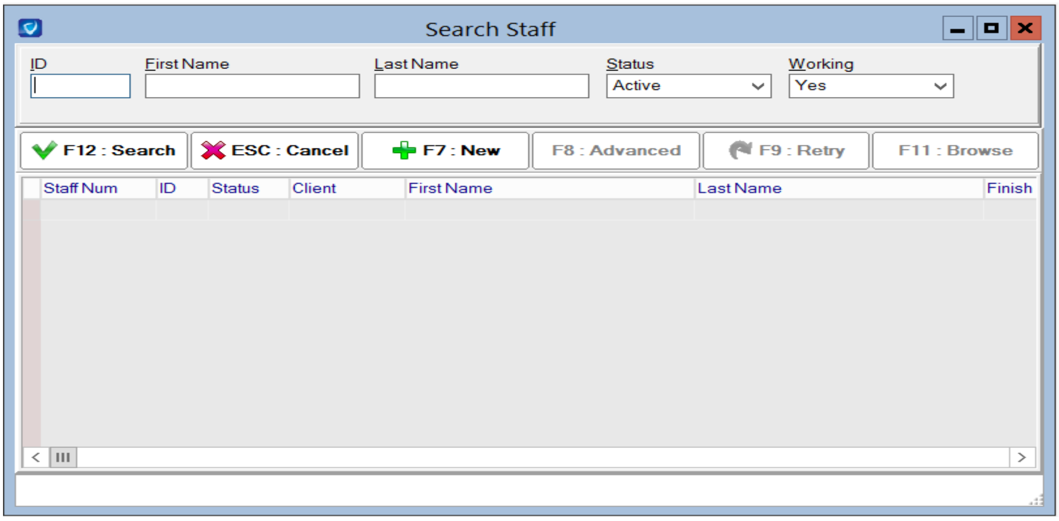
9. If you have not set the password a prompt will appear telling you that their password is 'password'. Click **'OK'.**

HOW TO EDIT / VIEW STAFF DETAILS

The staff search function is used in many areas of the program. However, regardless of what you are doing, when searching for a staff member, the same search options and dialogue boxes are used throughout the program.

1. Click on the **'Staff'** icon to activate this module.

2. This will display the staff search window.



3. Enter your search criteria and click **'F12: Search'** to begin the search.

ID	The staff members' ID / username
First Name	The staff member's first name.
Last Name	The staff member's first name.
Status	Whether the staff member is **'active'** or **'inactive'**.
Working	Whether the staff member is rostered onto a diary. Set this to **'Either'** if you are unsure.

4. The search results are now displayed. To navigate through the list, use the keyboard cursor keys (up and down arrow keys) or use the scroll bar at the right-hand side of the window.

5. To make a selection double-click on a line in the results window, or using the keyboard move the highlight to the line required then press the **'F12: Accept'** key to select.

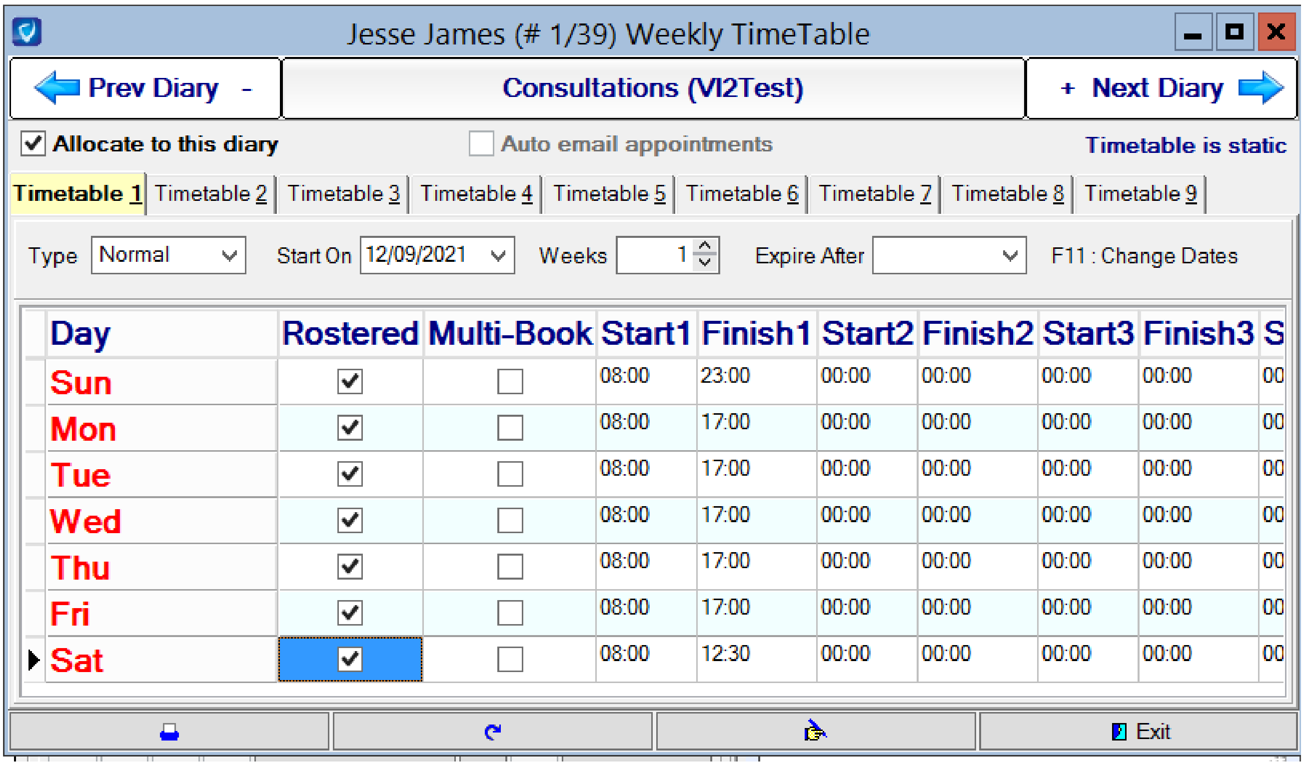
6. Edit the staff details as required and click on the tick button to save.

HANDLING STAFF ROSTERS

The staff rosters function is used to add new staff members to a diary, remove staff members from a diary and edit a staff member's diary details. Other functions include setting the diary that the staff member is to appear in and the working times for that staff member.

How to Set / Edit Staff Rosters

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



6. Select the diary you want to create a roster for using the **'Prev Diary'** and **'Next Diary'** buttons.
7. Place a tick in the **'Allocate staff 'XXXX' to this diary'** check box.
8. Click on the **'Timetable 1'** tab.
9. In the **'Type'** field choose the type of diary you wish to create.

Normal	Where you would enter your normal / every day roster. Must be used for revolving rosters
Holiday	The holiday timetable takes precedent over any other timetable. It kicks in on the **'Start On'** date and runs until the **'Expire After'** date. This timetable cannot be used as a revolving roster.

10. Enter the **'Start On'** date that you want this timetable to become active on.

11. Enter the **'Weeks'** you want the timetable to run for. Once the weeks runs out the timetable will finish and move on to the next timetable if one exists.

12. Enter the **'Expire On'** date. The timetable will become inactive and expire after this date. You do not have to enter a date if the timetable is indefinite.

13. Place a **'check'** in the days you wish to roster the staff member on for by putting a cross in the **'Rostered'** column checkbox.

14. Next, enter the start and finish times for the staff member in 24 hour format by entering times into the **'Start1'** and **'Finish1'** columns. For example if a staff member is rostered on from 8:00am to 5:00pm, you would enter 08:00 in the **'Start1'** column and 17:00 in the **'Finish1'** column.

Note: You can enter up to five start and finish times. This is useful if you have a fixed break during the day during which you don't want appointments made. For example you may have a lunch break every day from 12pm to 1pm.

15. Click on the tick button in the bottom right hand corner of the timetable window and this will save the changes made.

16. If you run multiple timetables that change from week to week click on the "Timetable 2" tab and repeat steps 9 – 13 for the number of timetables you wish to run. For example, if Mary works Mondays one week then Tuesday the next week, set her up in timetable one with her Monday hours, then set her up in timetable two with her Tuesday hours. On both timetables, set the 'Weeks' to 1 and use the 'Start On' date in timetable one to specify which week her Monday roster first starts.

Note: Multiple timetables will run in order from **'Timetable 1'** up to **'Timetable 9'**. The timetable will first check the **'Start On'** and **'Expire on'** dates to make sure the timetable is active.

If the timetable is active, it will run for the number of weeks specified in the **'Weeks'** field. Once the **'Weeks'** limit is reached, the diary will move onto the next timetable. When the last timetable is finished it will cycle back to **'Timetable 1'** or the next active timetable.

Removing Staff from the Diary

Once a staff member has left you may need to have them removed from the diary. To remove a staff member from the diary follow the steps below.

1. Check the diary for any future appointments or locks. These must be transferred to another staff members or cancelled before the staff member can be taken off the diary.

TIP: You can print out a report of all future appointments for a staff member by clicking on the **'Print'** button at the bottom of the diary, then selecting the **'All Future Appts for a Staff Member'** option.

2. Search for the staff member you wish to edit the roster for.
3. Once the staff record is open click on the **'8: Staff'** tab.
4. If the staff member has left the business enter a date in the **'Finish'** date field.
5. Click on the **'F11: Roster (Click for details)'** button. This will open the **'Weekly Timetable'**.
6. Next, remove all checks from the **'Rostered'** column and set all the **'Start'** and **'Finish'** times to 00:00.
7. Remove the tick from **'Allocate staff 'XXXX' to this diary'**.
8. Click on the tick button to save changes.
9. Click on the **'Exit'** button to close the staff member's timetable.
10. Next click on the **'1: Personal'** tab.
11. Change the **'Status'** field to **'Inactive'**.
12. Click on the tick button to save changes.
13. Once the background has processed the staff member should be removed from the diary. If the staff member still appears on the diary and their name appears at the top of their column in red letters, then there are still appointments on the diary for this staff member. Either move or delete these appointments (or locks) and the staff member will be removed from the diary.

ADJUSTING STAFF ROSTERS

Adding Staff on a Non-Rostered Day

The diary automatically adds staff members to the diary using a staff members roster on their staff record. Occasionally, a staff member may come into work on a non-rostered day and therefore will not have a column on the diary. You can use the **'Add Staff'** to add the staff member onto a single day. To do this follow the steps below.

1. Go to **'F7: Staff' | 'Add Staff'**.
2. Search for the staff member you wish to add and click **'F12: Accept'**.
3. The staff member will be added to the diary. Blue manual locks will appear in place of the normal **'Not Working'** times. If the staff member's roster is updated to be working for this day, the manual locks will override the roster.

Altering Staff Hours on a Single Day

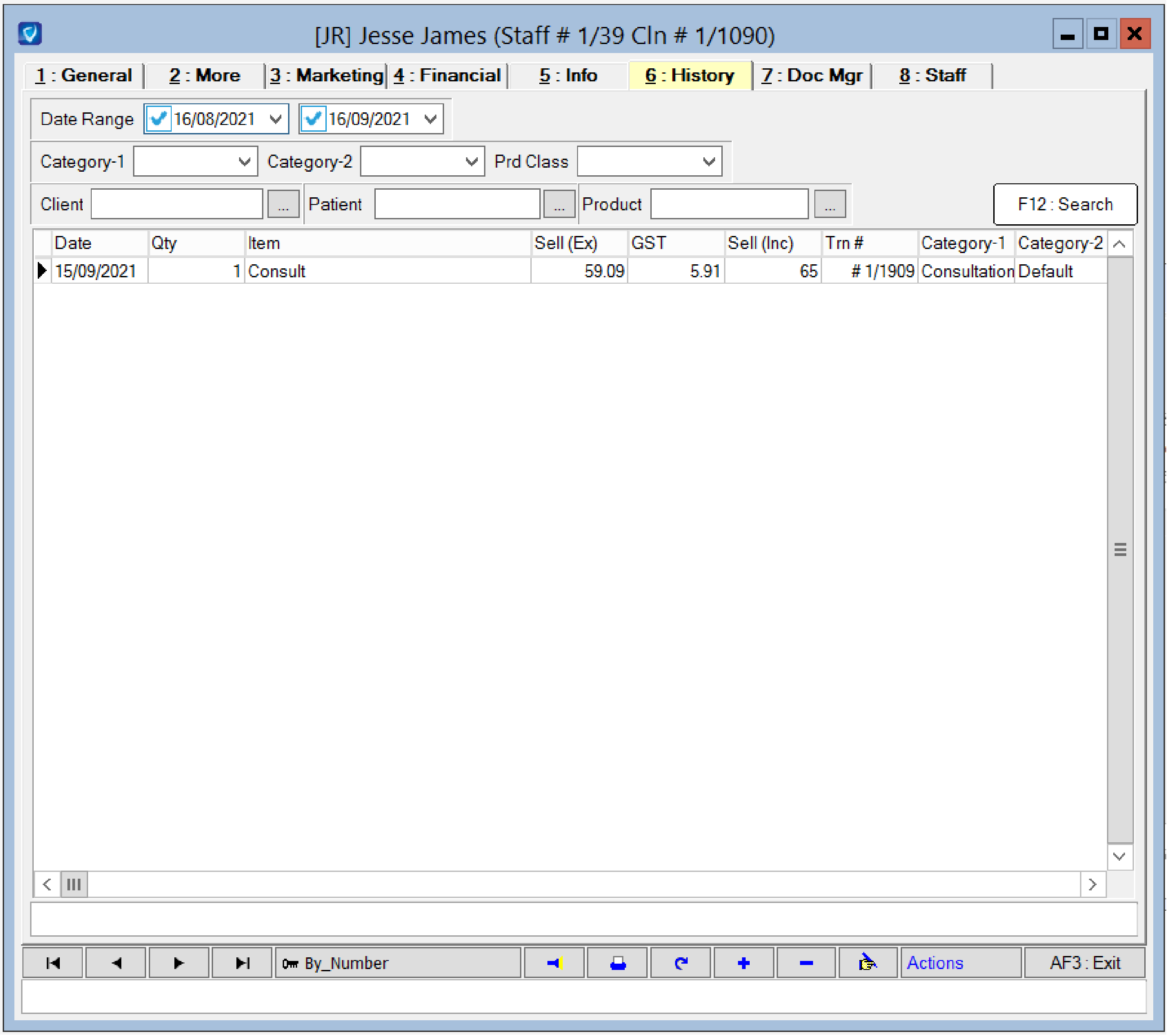
The background processor will periodically check the staff roster on the staff record and allocate the diaries based on that. If you move the grey **'Not Working'** times on the diary, when the background allocates the roster it will change the **'Not Working'** times back to whatever is in the roster. To alter the hours when a staff member works overtime or starts late you need to change the grey **'Not Working'** times to blue manual locks.

1. Find the day in the diary you wish to extend the staff members hours for.
2. Right click on a staff members **'Not Working'** time and select **'Change to Manual'**.
3. The **'Not Working'** Times should turn blue. Using your mouse drag the 'Not Working' times to the hours you wish.

NOTE: When they diary allocates the staff rosters the **'Not Working'** times in blue will not be moved.

HOW TO VIEW STAFF SALES HISTORY

1. Click on the **'Staff'** icon to activate this module.
2. Search for the staff member you wish to edit the roster for.
3. Once the staff record is open click on the **'6: History'** tab.
4. The sales history will now be displayed. You can filter the sales history by changing the filter fields (the Date Range, Client, Product, Category-1, Category-2 and Prd Class fields).



STAFF ACCESS LEVELS

VetlinkPRO can be set up to require users to log in before they can access certain functions. For example, if only managers can authorise a refund, you could set VetlinkPRO up to ask for a username and password when the refund function is accessed. If the user has not been assigned to the Manager access level then they will not be able to do a refund.

Step 1: Create Access Levels

The first step is to create the access levels that you want to assign staff members to. For example, Junior Staff, Senior Staff and Managers.

1. Go to the **'Options'** menu and then select **'Setup'**.
2. Log in with your username and password.
3. Click on the **'Staff'** button and then the **'Access'** tab.
4. Enter the names of the level you wish to use in the **'Access Names'** section.

NOTE: The first 3 levels of Default, Owner and Desk are entered by default and cannot be changed.

Step 2: Assign Access Rights for Each Access Level

The second step involves assigning tasks to each Access Level you have created. For example, the manager might be able to do everything while senior staff can do everything except view the financial reports.

1. Go to the **'Options'** menu and then select **'Setup'**.
2. Log in with your username and password.
3. Click on the **'Staff'** button and then the **'Access'** tab.
4. In the User Access Levels section there will be multiple columns with tick boxes.

   Each column represents an Access Level that you entered in step 1. Each tick box represents a task that can be performed by that Access Level. For example, if you would like Senior Staff to be able to do Bill discounts place a tick in the Senior staff column on the Bill Discounts line. Once finished close out of Setup.

NOTE: If you do not want users to log in to perform a function make sure the default column is ticked. For example, it may be time consuming to log in every time a bill is done. If this is an issue place a tick in the Default column on the Billing line. It is also highly recommended for the owner column to have all boxes ticked.

Step 3: Assign Staff Members an Access Level and Password

The third step is to assign staff members to an access level and set them up with a password.

1. Open the staff record and click on the **'8: Staff tab'**.
2. The manager or owner will need to log in before any details can be changed.
3. In the **'Access Level'** field select the level you wish to assign the staff member to, e.g. Senior Staff.
4. Click the '**Change Password'** button to change the default password.
5. Click into the **'Enter New Password'** field and enter the staff members new password, repeat this step in the **'Re-Enter Password'** field and click '**F12: Accept'**.
6. Press enter on the keyboard and select **'OK'** to the password change prompt.

NOTE: The username that each staff member will use to log in is the ID found in the **'Staff ID'** field on the **'1: Personal'** tab of the staff record

Step 4: Setting the Idle Logout and Application Shutdown Times

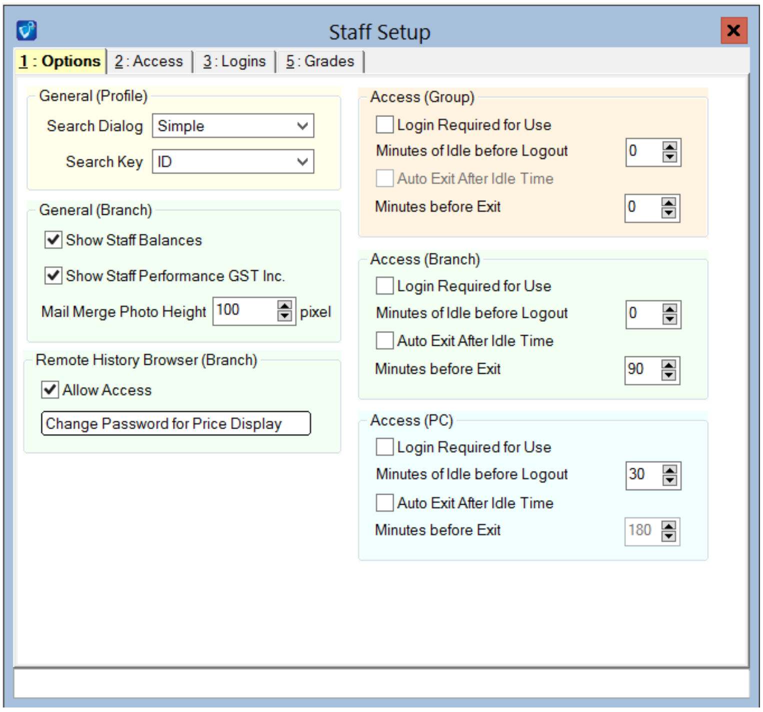
For security, resources management, speed and maintenance issues the Idle and shutdown facilities have been expanded. Idle and Shutdown features can be controlled at three levels:

- At the Group Level when the Business is a part of a Group or Chain.
- At the Branch Level.
- And Individually.

These are hierarchical, the Group takes precedence over the Branch which takes precedence over the individual PC setting. If you want each PC to have different timeout setting then just enable the **'Access (PC)'** setting on each workstation.

The options controlling access can be changed from **'Options | Setup | Staff | Options'** tab. The, logout and shutdown options are as follows;

1. **Login Required for Use:** By default, a user can use the Application without logging in. What they can do is controlled by the Default Role in Access Control. Tick this if the user must login before using anything in the Application.
2. **Minutes of Idle before Logout:** This is the time that the keyboard or mouse has not been used, before the Application goes into Idle mode. If a user is logged in, they will be logged out. The minimum setting for Idle is 1 minute and the maximum is 90 minutes.
3. **Auto Exit After Idle Time:** This is always enabled because we need the following
    1. Resources freed up (such as memory and CPU time).
    2. Database Transactions closed for speed.
    3. Number of User Licences freed up for reuse.
    4. The Application shut down at night for maintenance.
4. **Minutes before Exit:** Once the Application has gone into idle, Shutdown will kick in and this is the time that it will count down before the Application is closed. The minimum setting for this timer is 5 minutes and the maximum is 90 minutes.



NOTE: But what if I am doing something?

- If you are at the screen, you can just cancel it.
- If you are consistently getting annoyed then increase the timeout.
- If you are running a report then the Application will give twice the logout time configured.
- If you are doing any End of Period function then the Application will give twice the logout time configured.
- If you have run a report that has taken longer than 10 minutes then the Application will give twice the logout time configured. Note that there are not many reports that will take this long to run.

But what if I running an external program?

- The application will suspend the idle timeout until you return. E.g. If you launch a word document from VetlinkPRO to edit, the timeout will be suspended.

Access Level Descriptions

You can restrict access to certain functions and information via access levels. You must have at least one access level with full control, usually for the owner. It is also essential that you identify the functions allowed at the "Default" access level, everyone can access functions permitted at this level. Only functions necessary for the day-to-day running of your business should be allowed at this level, for example:

- Make bills
- Create new clients.
- Create appointments in the diary.

The following is a list of functions that may be controlled by access levels.

Accesses				**Accessed function allows staff to:**
	Default	**Owner**		**Default is the access given to a user without logging in**
Client Maintenance		X		*Maintain Client related information such as Categories, Profiles and Rooms*
Staff Maintenance		X		*Maintain Staff related information such as Categories*
Product Maintenance		X		*Maintain Product related information such as Categories and Profiles*
History Maintenance		X		*Maintain History related information*
Diary Maintenance		X		*Maintain Diary related information such as Profiles*
Hotel Maintenance		X		*Maintain Hotel related information such as Profiles and Rooms*
Patient Maintenance		X		*Maintain Patient related information such as Profiles, categories, breeds and colours*
Supplier Maintenance		X		*Maintain Supplier related information*
GL Maintenance		X		*Maintain General Ledger related information*
Billing		X		*Create bills for clients and cash sales.*
Bill Item Discounts		X		*Apply a discount to individual bill items.*
Bill Discounts		X		*Apply an overall discount to the whole bill.*
Bill Price Changes		X		*Change the price of an item at billing.*
Bill Item Description		X		*Change the description of an item at billing.*
Charge to Account		X		*Charge a bill to a client's account.*
Bill Item Exchange		X		*Not Enabled*
Cancel Billing		X		*Cancel a bill*
In House Transactions		X		*Make In-house usage bills.*
Bill Refunds (Ad Hoc)		X		*Refund client bills.*
Credit Notes (Existing Bills)		X		*Make credit notes.*
Quotes & Estimates		X		*Create a quote or estimate*
Batched Bills		X		*Create batched bills*
Future Bills		X		*Create future bills*
Membership Bills		X		*Create membership bills*
Bulk Billing		X		*Create bulk billing*
Bulk Payments		X		*Create bulk payments*
Prescriptions		X		*Add Large Animal Prescriptions*
Repeat Prescriptions		X		*Add Small Animal Prescriptions*
End of Day		X		*Perform the End of Day process.*

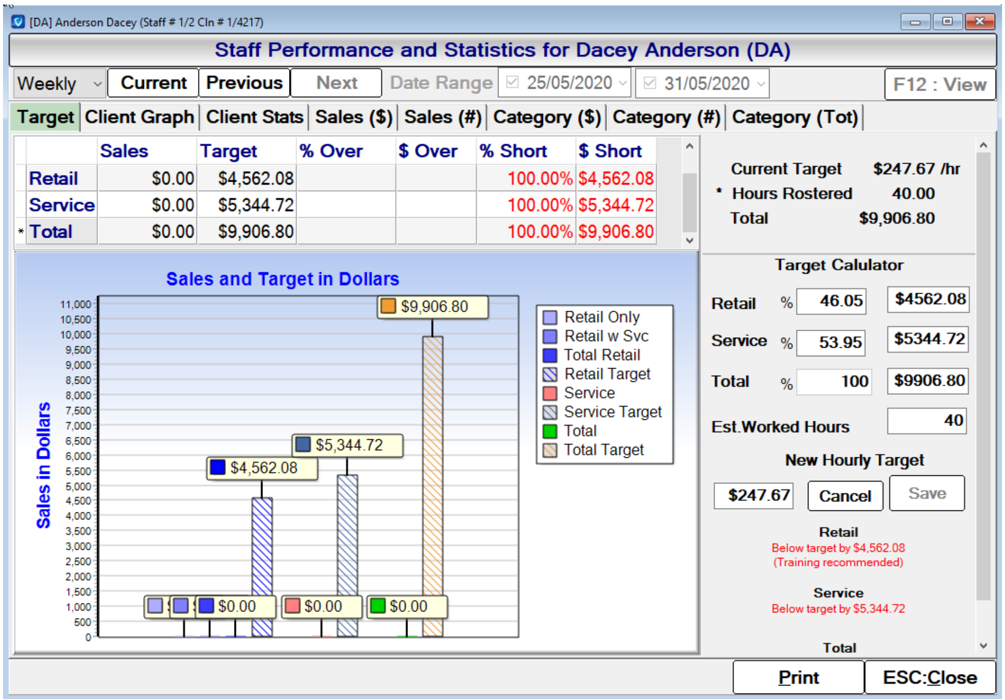
End of Week		X		*Perform the End of Week process.*
Aging and End of Month		X		*Perform the Aging and End of Month process.*
End of Year		X		*Perform the End of Year process.*
Make Statements		X		*Ability to build statements*
Yukti Automation		X		*Not available yet – Setup the automation engine*
Loyalty Setup		X		*Setup the Loyalty System*
Loyalty Redemption		X		*Redeem Loyalty Benefits (Does not control bonus points)*
Loyalty Registration		X		*Register clients for loyalty*
Report Maintenance		X		*Create or modify reports.*
Client Reports		X		*Produce client reports.*
Staff Reports		X		*Produce staff reports.*
Product Reports		X		*Produce product reports.*
Account Reports		X		*Produce account reports.*
Creditor Reports		X		*Run creditor reports.*
GL Reports		X		*Produce GL reports*
Patient Reports		X		*Produce Animal reports*
Other Reports		X		*Produce Other reports*
Reminders / Recalls		X		*Generate mailers to go to clients.*
Bulk Mailers		X		*Ability to send Bulk Mailers*
NewsLetters		X		*Ability to run reports from the Newsletter group*
Promotions		X		*Ability to run reports from the promotions group*
Address Labels		X		*Ability to run reports from the address labels group*
Reports / Lists		X		*Ability to run reports from the reports / lists group*
Export/Spreadsheets		X		*Ability to export to excel*
Yukti Reports		X		*Not Applicable / not used.*
Client Edit		X		*Maintain Client Records*
Client Create		X		*Create new clients.*
Client Inactivation		X		*Inactivate client records*
Client Discounts		X		*Set client discounts on the client record.*
Client Accounts		X		*Maintain Client account information.*
Stop Charge		X		*Edit stop charge in client record*
Debtors W/O		X		*Write off bad debt*
Init Client Balance		X		*Initialize a client balance*
Product Edit		X		*Maintain Product Records*
Product Create		X		*Create new products.*
Product Inactivation		X		*Inactivate Product Rcords*
Change Product Makeup		X		*Change the structure and makeup of the product (Essentials)*
Change Product Pricing		X		*Change product pricing*
Change Product Discounts		X		*Change product discounts*
Product View Cost		X		*View the cost price of products.*
Change Prd Templates		X		*Maintain Product Labels, Certificates and Handouts and email templates (not specifically just product)*
Batch/Expiry Maintenance		X		*Maintain batch and expiry in Product, Billing and Transfers*

Stock Adjust		X		*Perform the stock arrived function, i.e. Receive inwards goods.*
Stock Transfers		X		*Transfer stock between Stores / Sites.*
Stock Takes		X		*Generate stock-take sheets.*
Staff Edit		X		*Maintain Staff Records*
Staff Create		X		*Create new staff records.*
Staff Inactivation		X		*Inactivate Staff Records*
Staff Target		X		*Enable access to staff target in staff record*
Send AdHoc SMS		X		*Send custom SMS from diary*
Send Email		X		*Allows sending of email*
Patient Edit		X		*Maintain Patient Records*
Patient Create		X		*Add new patient record*
Patient Inactivation		X		*Inactivate Patient Record*
History Edit		X		*Edit History*
History Create		X		*Create History*
History Delete		X		*Delete History*
Edit Other Staffs History		X		*Edit History of Another Staff*
Diary Edit		X		*Maintain Appointments*
Diary Create		X		*Create appointments in the diary.*
Diary Delete		X		*Delete appointments in the diary*
Standing Appointments		X		*Create standing appointments*
Diary Locks		X		*Create locks on the diary*
Paid Locks		X		*Create paid locks on the diary*
View All Todo Lists		X		*View every Staffs To Do Lists*
Hotel Booking		X		*Maintain Hotel Related Information such as Profiles and Rooms*
Hotel Create		X		*Create hotel rooms*
Hotel Delete		X		*Delete hotel rooms*
Supplier Edit		X		*Maintain Supplier Records*
Supplier Create		X		*Create Supplier records.*
Supplier Inactivation		X		*Inactivate Supplier Records*
Creditors Write-Off		X		*Control Creditors Write-Off and Undo Write-Off*
Creditor Orders		X		*Create creditor orders*
Packing Slips		X		*Make and maintain Packing Slips*
Creditor Invoices		X		*Create creditor invoices*
Creditor Payments		X		*Create creditor payments*
Expense Handling		X		*Can do payments to the Suppliers of the Businesses expenses (e.g. power).*
Enable General Ledger		X		*Allows access to GL*
GL Chart of Accounts		X		*Maintain Chart of Accounts*
GL Bank Reconciliation		X		*Edit GL bank reconciliation*
GL Journal Entry		X		*Edit GL journal entry*
GL Asset Register		X		*Edit GL asset register*
GL End of Year		X		*Edit GL end of year*
Picklist Maintenance		X		*Modify client history abbreviations in the pick-list.*
Picklist Create		X		*Create client history abbreviations in the pick-list.*
Open Cash Drawer		X		*Open the cash drawer with the key combination <Shift> + <F10>.*

Change Current Till		X		*Change which till is used currently*
Change Current Store		X		*Change which store is used currently*
Remove Resource Locks		X		*Allows for lock removal from diary*
View Audit/Event Logs		X		*View edit log and event log*
Mobile Show Price		X		*Mobile: Show Price in Billing*
Mobile Show Other Staff Appts		X		*Mobile: View Other Appointments of other User*
Mobile allow make Appt		X		*Mobile: Make Appointments*
Mobile Make Appts for other Staff		X		*Mobile: Make Appointments for other Users*
Web Browsing		X		*Enable web browser access*
Till/Store Maintenance		X		*Ability to change till/store from main window*
Multi-Site Maintenance		X		*Ability to change site*
Record Deletion		X		*N/A*
Group Setup		X		*Change Group Configuration*
Master Setup		X		*Modify master-level settings in Setup (Global: affecting everyone everywhere).*
Local Site Setup		X		*Modify site-level settings in Setup (Local: affecting everyone at a particular site).*
User Config Setup		X		*Change Profile Configuration*
Control Services		X		*Controls the Services Remotely*
Recurring Invoices		X		*To Make Recurring Invoices / Payment Bill*
Manage Recurring Invoices		X		*To Manage Recurring Invoices*
Health Plan Maintenance		X		*To manage health plan templates*
Manage Health Plan Registration		X		*To manage health plan registrations*
Health Plan Sales Override		X		*Override to give health plan benefits at billing*
Make Insurance Claim		X		*To make insurance claims*

STAFF PERFORMANCE AND STATISTICS

The Staff Performance and Statistics feature complements the staff performance and productivity reports and provides a quick and easy way for staff to review their own performance for the week. It allows them to determine what areas they have been performing well in and what areas require more attention. Each tab of the Staff Statistics window is designed to evaluate different areas of their performance. To view the staff statistics screen, open any staff record, browse to the **Staff** tab and click **Staff Statistics**.



Target Tab: This tab displays a graphical view of the staff member's retail and service sales in comparison to pre-set targets. The top section reveals all the actual figures in a table view and displays exactly how far over or under the target they have achieved. This tab allows the staff member to quickly see if they are performing as expected overall.

The target tab has a number of different display options, it can be viewed for a single day, a week, a month or you can specify a custom date range. You may choose what period you are viewing using the **Previous**, **Current** and **Next** buttons. The targets can be changed by managers on this screen or changed for all staff members at once in the **Set Target and Shop Statistics** screen described below. The working hours are automatically calculated by the amount of open time available in the diary for that period.

Client Graph Tab: This displays a graphical breakdown of the number of clients seen broken down into client types. New clients, regular clients and retail only clients.

Client Stats Tab: A table view of sales broken down by client types, much like the staff performance report. Also allows you to compare this staff member's sales vs the entire clinic.

Sales (Dollars) Tab: Displays a line graph showing a 7 week comparison of retail, service and total sales compared to targets. This tab is great for comparing performance trends over several weeks. Using the tick boxes provided you can select information to plot on the graph for analysis.

Sales (Numbers) Tab: Displays various client number statistics in a line graph. New Clients, Regular Clients, Rebooked, Requested, Retail Only, Male and Female. Using tick boxes provided you can select information to plot on the graph for analysis.

Category (Dollars): A horizontal bar graph showing weekly sales totals by product category sorted from highest to lowest. This is great for showing which product ranges the staff member may be neglecting when selling.

Category (Numbers): A horizontal bar graph the same as Cat (Dollars) but displayed in terms of quantity sold rather than dollar value.

Category (Totals): Table view displaying total sales for categories in quantities and dollar value sorted alphabetically.

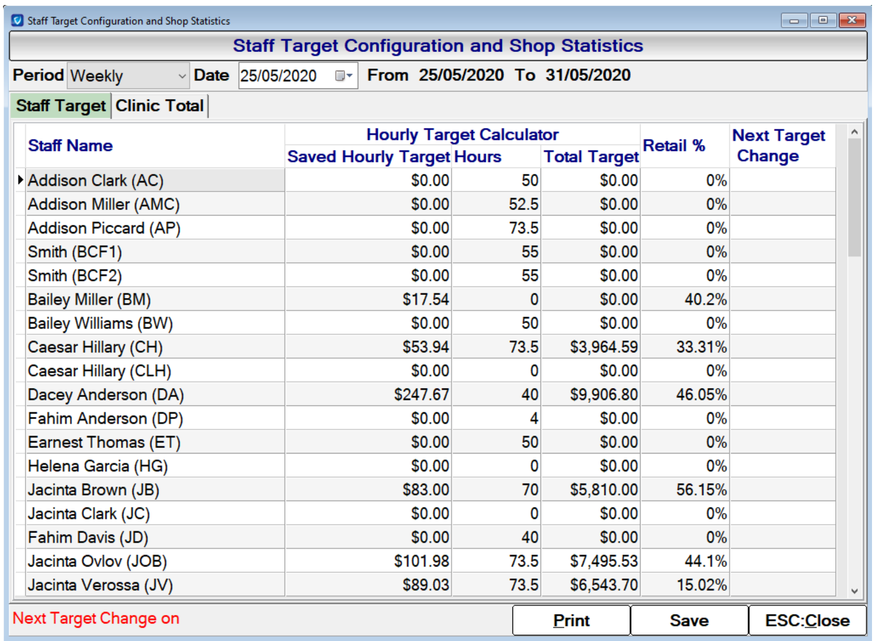
Set Target and Shop Statistics

The Staff Target screen is designed to be used by a manager to set hourly sales targets for each staff member, this is multiplied by the total hours working for that period to get a total staff target. These targets will vary greatly depending on the staff member and what role they perform.
The 'retail %' field specifies what percentage of total sales should be retail items.

IMPORTANT: The total hours working does not take into account paid or unpaid locks. Total hours worked for a staff member should be treated as an estimate only.

The Clinic Total tab is for displaying statistics in graph form for all staff members at once allowing you to compare staff member's performance in many different ways. If you are wishing to compare information for a single staff member you are better off using the Staff Performance and Statistics screen instead.

To view Staff Targets and Clinic Totals, go to **Actions | Set Target and Shop Statistics**.



Staff Target Configuration and Shop Statistics

Staff Target Configuration and Shop Statistics

Period Weekly Date 25/05/2020 From 25/05/2020 To 31/05/2020

Staff Target | Clinic Total

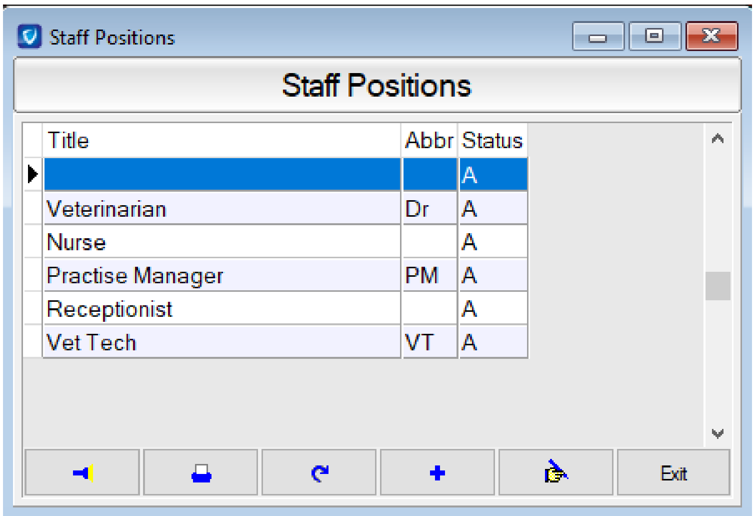
Staff Name	Hourly Target Calculator			Retail %	Next Target Change
	Saved Hourly Target	Hours	Total Target		
Addison Clark (AC)	$0.00	50	$0.00	0%	
Addison Miller (AMC)	$0.00	52.5	$0.00	0%	
Addison Piccard (AP)	$0.00	73.5	$0.00	0%	
Smith (BCF1)	$0.00	55	$0.00	0%	
Smith (BCF2)	$0.00	55	$0.00	0%	
Bailey Miller (BM)	$17.54	0	$0.00	40.2%	
Bailey Williams (BW)	$0.00	50	$0.00	0%	
Caesar Hillary (CH)	$53.94	73.5	$3,964.59	33.31%	
Caesar Hillary (CLH)	$0.00	0	$0.00	0%	
Dacey Anderson (DA)	$247.67	40	$9,906.80	46.05%	
Fahim Anderson (DP)	$0.00	4	$0.00	0%	
Earnest Thomas (ET)	$0.00	50	$0.00	0%	
Helena Garcia (HG)	$0.00	0	$0.00	0%	
Jacinta Brown (JB)	$83.00	70	$5,810.00	56.15%	
Jacinta Clark (JC)	$0.00	0	$0.00	0%	
Fahim Davis (JD)	$0.00	40	$0.00	0%	
Jacinta Ovlov (JOB)	$101.98	73.5	$7,495.53	44.1%	
Jacinta Verossa (JV)	$89.03	73.5	$6,543.70	15.02%	

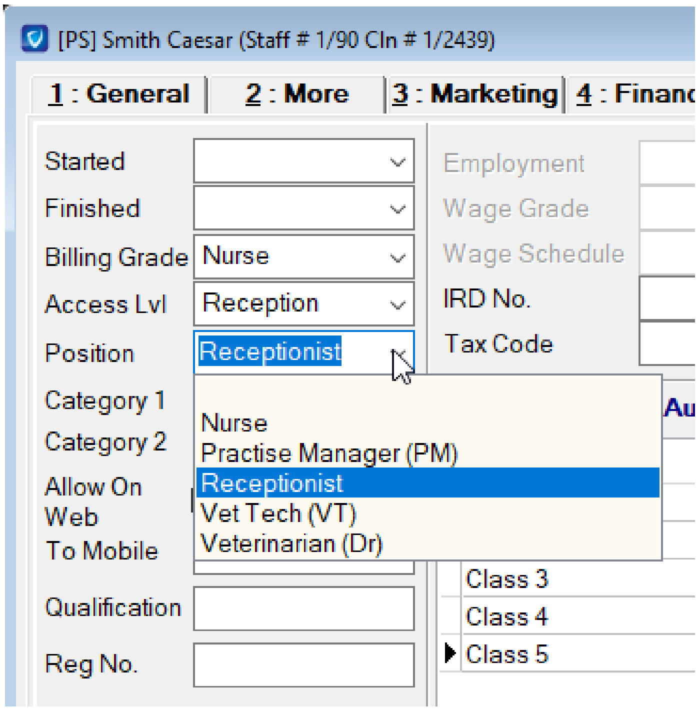
Next Target Change on | Print | Save | ESC:Close

STAFF POSITIONS

By default, when printing drug labels, Dr is printed in front of the name of the dispensing staff member when this staff member may actually be a nurse etc. However each staff member can be assigned a staff position which will affect what prints out on drug labels. The staff member that is printed on the label is changed by selecting the **Doctor** when entering the drug script.

To set up staff positions, go to **Options | Picklists | Staff | Staff Positions** then use the '**+**' button to add any new staff positions you may require. This staff position can then be selected on the '**Staff'** tab of any staff record.

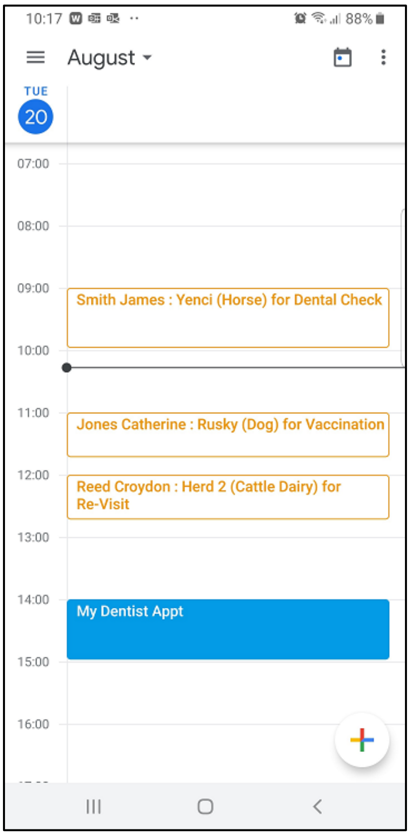




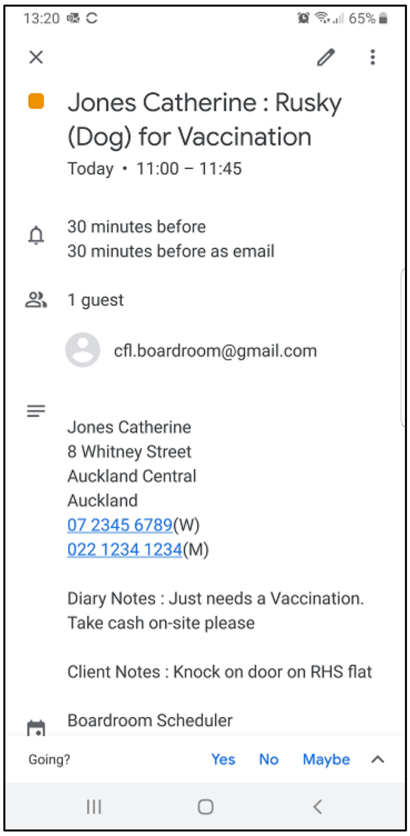
STAFF APPOINTMENT UPLOAD TO GOOGLE PERSONAL CALENDAR

Want to know what you're VETLINKPRO appointments will look like tomorrow while out and about? With our Staff Appointment upload feature you can just check your phone!

New appointments or appointment changes for a staff member can be uploaded automatically to their personal google calendars. It has been designed and tested specifically for the google calendar. Other calendars may work but software changes will not be done for these calendars if there are issues. The Google calendar is the only officially supported calendar.



Day view of Google calendar on Phone



Appointment Details from phone

To configure staff appointment upload;

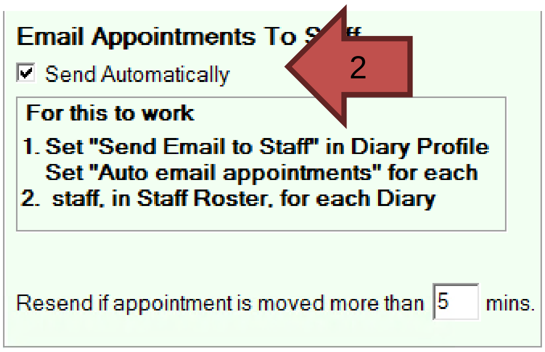
1. Email will need to be enabled under **Options | Setup | Misc | Internet Options**. If this is not already done please contact CFL for instructions.

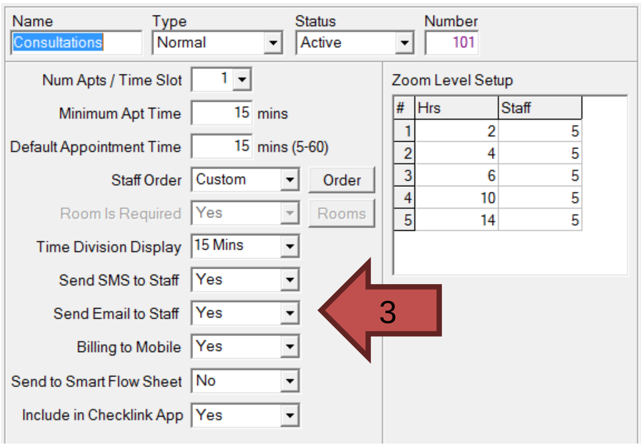
2. Under **Options | Setup | Diary | 2: More Options**
   a. Under Email Appointment to Staff tick **Send Automatically**.
3. Go to **Options | Pick Lists Setup | Diary | Diary Profiles |** select Diary staff appointments to be emailed from and set **Send Email to Staff** to **Yes**.

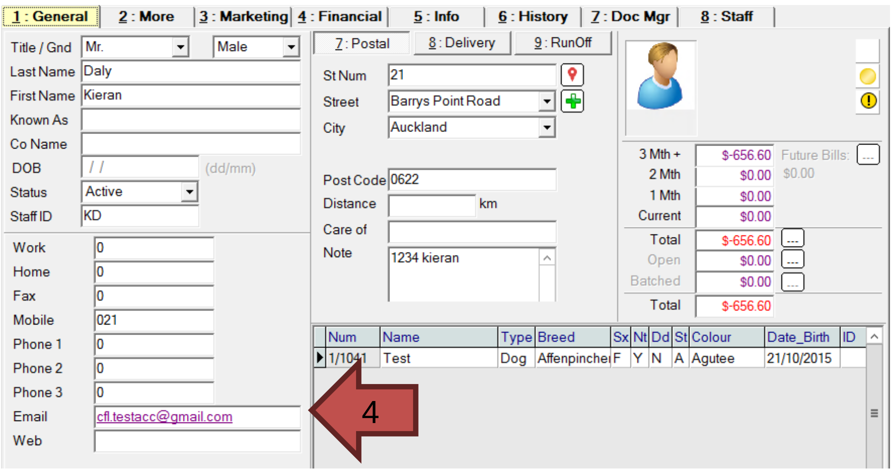
4. Make sure the staff email address on the staff record is set to the email address linked to the calendar they want updated.

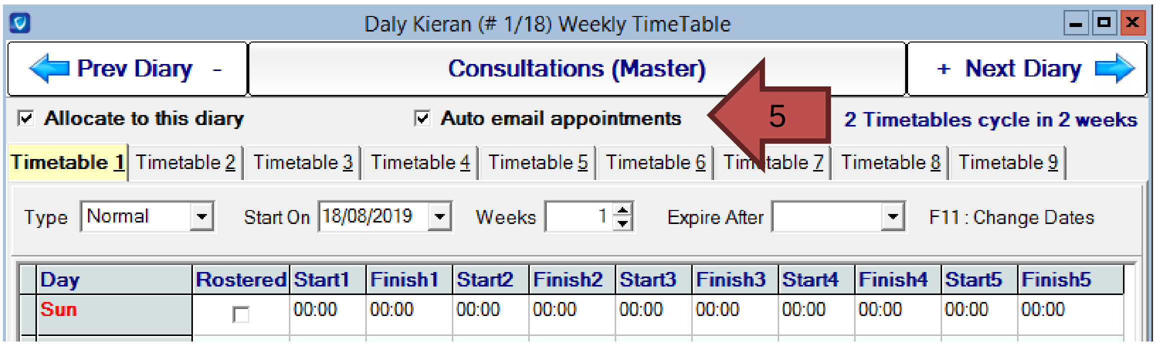
5. Set **Auto Email Appointments** for each staff in their staff roster for the diary they want appointments emailed from.

6. Once set up, when an appointment is created or changed in VETLINKPRO an email will be sent to the email address stored in the staff record. The email will contain a Notification attachment that will update the Vets calendar.









Note: If the inbox is getting cluttered with notification messages Gmail does allow you to set filters where you can auto archive emails based on a set of rules. To set filters from a PC log into Gmail and go to **cog** in top right and select **settings** -> then click **Filters and Blocked Addresses** tab -> click **create new filter**. In the filter set the **From address** to the clinic email set in VetlinkPRO, set the **Subject** keyword to ***VetlinkPRO Appointment***, **tick has attachment** then click **continue**. On the next window **tick skip inbox (archive it)** and then **update filter**.

On a PC, to turn off the calendar sending a notification to your email before each of the appointments open the Google Calendar -> Under **My Calendars** on left hand side, click **more options (option with 3 dots)** next the calendar name and select **Setting and Sharing** -> on left hand side click **Event Notifications** and then set the **General Notifications** as per your requirements.

INSERT STAFF DIGITAL SIGNATURE

A Vets digital signature can be saved against their staff record and used to populate the signature when emailing or printing certificates, handouts and various other documents. .

To set this up

1. Create / Scan a signature.
2. Name and save the image with the Staff ID and Type of jpg. E.g. *JB.jpg*
3. Insert the signature into the **...\VL2\Data\Signature** folder.
4. In VETLINKSQL open your Certificate / Handout from the Product record.
5. Edit the certificate and using the **Insert Merge field** button select the **Staff Signature** Mail merge.
6. **Save and Exit** the Certificate.
7. In **Options | Setup | Staff | Options tab | set "Mail merge Photo height"** to set the size of the digital signature.

Note: Staff Qualification and **Staff Registration** mail merge variables are also available to insert. These variables are populated by the respective fields on the Staff Record.