MOBILE BILLING APP

CONTENTS

OVERVIEW

VETLINKPRO MOBILE is an App designed to be used by Veterinarians when visiting patients off-site. This is a true localised App that does not require a live internet or data connection when in the field. Data can be synced between the clinic VETLINKPRO server and this App when a connection becomes available. Generally a user will sync data when a Wi-Fi connection is available, either at the clinic, home or at a client site. Of course there is nothing stopping one syncing using mobile data if it is available and cost-effective.

MOBILE APP SETUP

Hardware Configuration

As the mobile billing app ca connect outside your clinic network your network administrator will need to open and forward ports in the firewalls and router to allow this. Specifically they will need to;

- Forward **Port 8086** in **Router to server** for the VetlinkPRO Datasnap service.
- Open **port 8086** in **Windows** or **software Firewalls** for the VetlinkPRO Datasnap service
- The port can be changed to a non-standard port however CFL will need to be informed so they can change the listening port on the Datasnap Service.

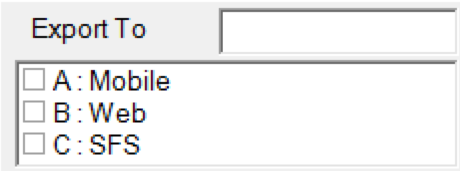
VetlinkPRO Setup

Product Setup

As the Mobile App is primarily intended for offsite billing, products used in offsite billing need to be flagged so they upload. This prevents items that won't ever be used being uploaded unnecessarily and increasing the list of products to search through. To flags product users can either;

A. CFL can run a query to mark product based on criteria as specified by the clinic. E.g. All products in specific large Patient product categories.

B. Users can mark items manually by;
   a. Opening the product record
   b. Click on **More** tab
   c. In **Export To** section tick **A: Mobile**.

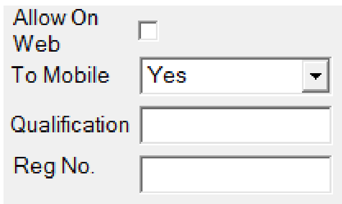


C. Use Search and Replace to flag products in bulk based on criteria such as product category. Note: There is no undo function when using Search and Replace so only use this function if you are confident using it, otherwise call the helpdesk for instructions.

Staff Setup

Each staff member that will be using the Mobile app needs to be flagged so they can log into the app by;

1. Opening the Staff record.
2. Click on **8: Staff** tab.
3. Set **ToMobile** to **Yes**.
4. The username and password for the app are the same as set on the Staff record for use in VetlinkPRO.

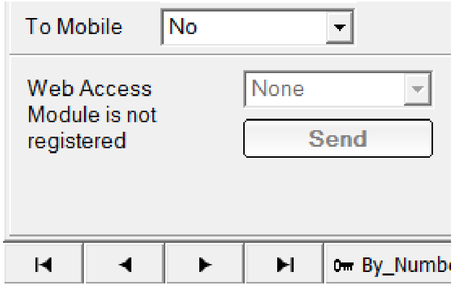


Client Setup

As the Mobile App is primarily intended for offsite billing, clients that will be visited for offsite call outs need to be flagged. This prevents clients that won't ever have offsite callouts being uploaded unnecessarily and increasing the list of clients to search through. To flag clients users can either;

A. CFL can run a query to mark clients based on criteria as specified by the clinic. E.g. All client with a large Patient.

B. Users can mark items manually by;
   a. Opening the client record
   b. Click on **More** tab
   c. Set **To Mobile** to **Yes**.

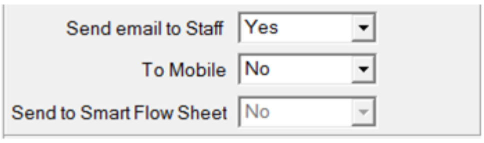


C. Clients will automatically have To Mobile set to Yes when an appointment for them for a staff member that has To Mobile set on the Staff record.

Diary Setup

Appointments can be uploaded to the mobile for Staff Members with To Mobile set on the Staff record. The diary for which you want appointments to be uploaded also needs to be flagged. To do this;

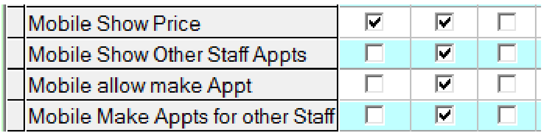
1. Go to **Options** then **Picklist Setup**.
2. Select **Diary** then **Diary Profile**
3. Double click diary you wish appointments to be uploaded from.
4. Set **To Mobile** to **Yes**.



Security Options

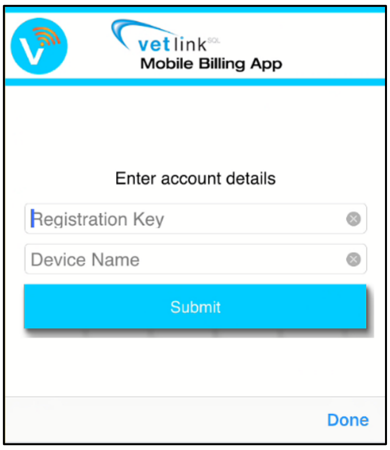
The access levels in VetlinkPRO control what staff can see and do on the mobile app. See the Access level section in the Staff Management chapter of the manual for more detailed instructions on setting this up. To set up the access level go to;

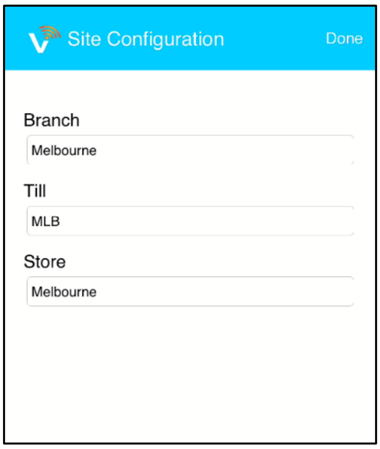
1. Go to **Options** then **Setup**.
2. Select **Staff** then **Access tab**
3. Scroll to bottom of access list to find Mobile options
4. To enable that functionality tick the box in the relevant access level column.
   a. Mobile Show Price: Shows item prices on mobile billing app
   b. Mobile Show other Staff Appointments: Allows staff to view other staff members appointments
   c. Mobile All Make Appt: Allows staff members to make appointment in VetlinkPRO for themselves.
   d. Mobile Make Appts for the Other Staff: Allows staff members to make appointment in VetlinkPRO for other staff members.
5. Exit setup.
6. Check staff records under Staff tab to ensure they are on correct access level.
7. After changing VetlinkPRO any existing apps will need to be re-synced with new setup options. In App go to **Utilities | Synchronise | Sync from Server | enable Site / Branch / Staffs and sync**.



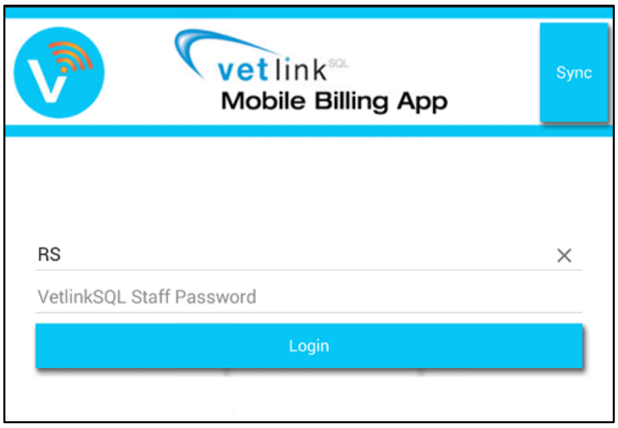
Downloading the Mobile Billing App

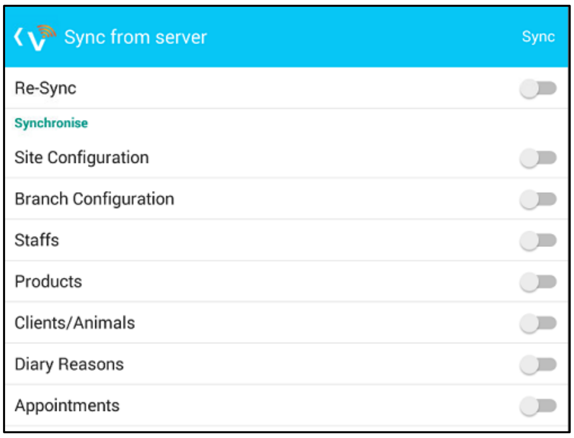
1. Go to the Apple or Play store.
2. Search for VetlinkPRO Mobile.
3. Download App and Install.
4. The first time opening the app you will be asked for Registration Key. Enter this as supplied by CFL. If you use a key already in use, and ignore warnings, syncing will be disabled on the device currently using that key.
5. You will also need to choose a device name. Choose a unique name that is not already used by a Mobile billing device in your clinic.
6. Select the branch, Store and Till you will be billing from. This can be changed later on from within the app as well.





7. Enter your staff ID and password. Only staff with ToMobile set on their staff records can sue Mobile billing app. If you forgot to do this set in VetlinkPRO and then click the Sync button at the top of the log in page to upload the new staff details.
8. Synchronise data.





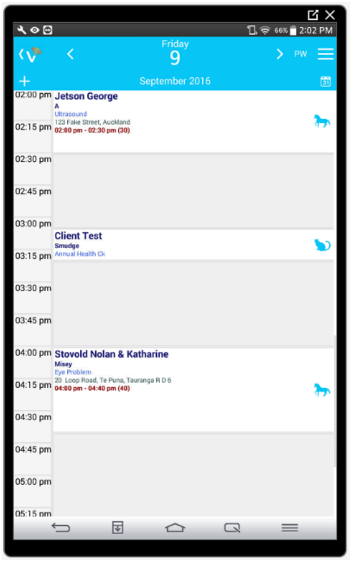
USING MOBILE BILLING APP

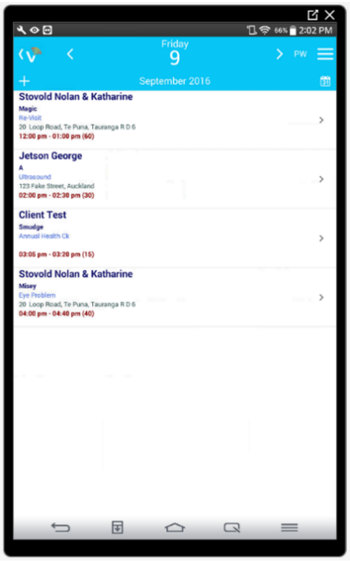
Making a Bill

Starting Bill from Appointment

1. From the Main Menu click Appointments.

2. You can view appointments either by;
   a. Day View: Graphical view by time.
   b. Agenda View: List of Appointments in Chronological order.
   c. Change view by clicking menu icon in top right hand corner





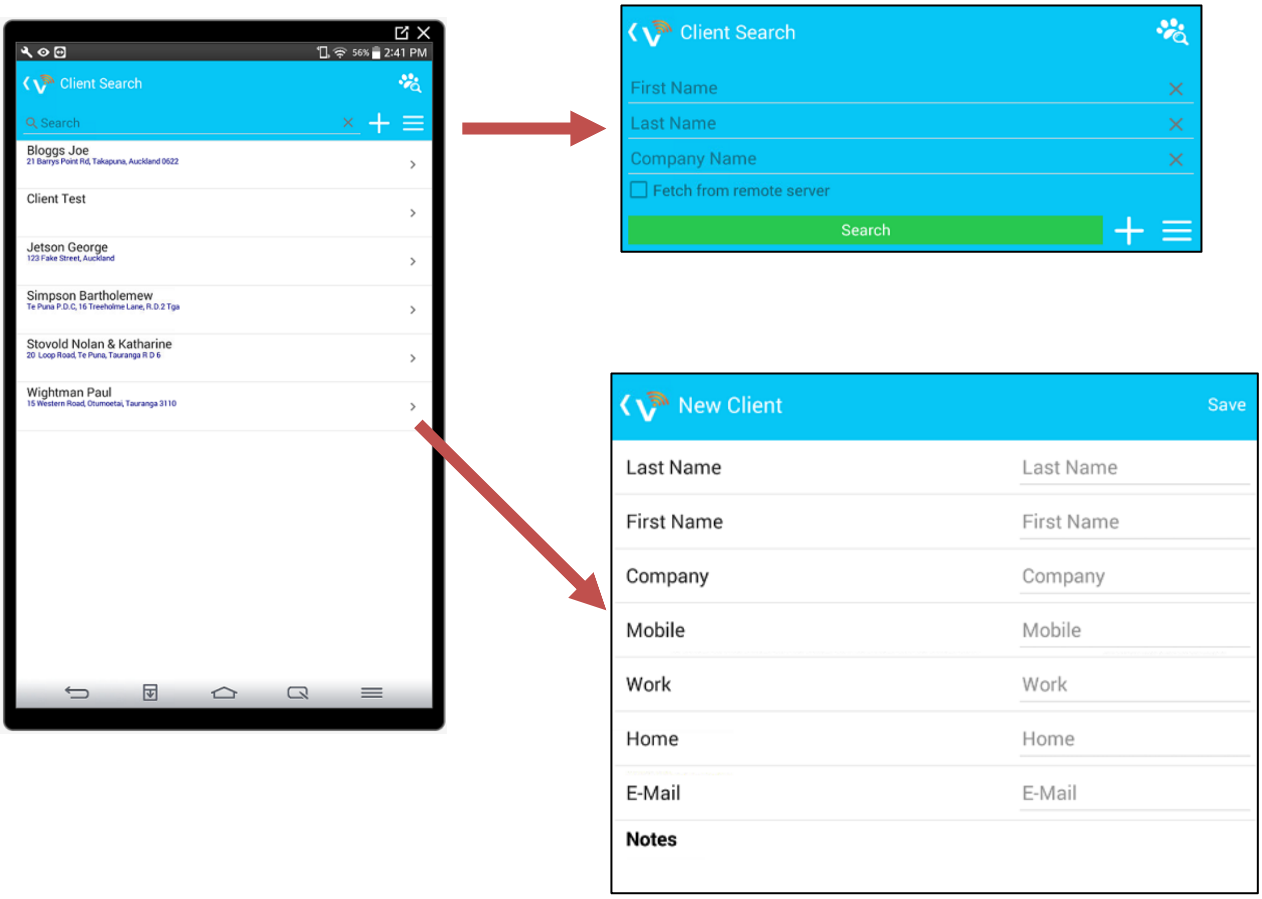
3. Select the appointment you wish to bill from.
4. This will open the client details. From here you can;
   a. View clients contact details such as phone number, address and email details.
      i. If you have a data or internet connection the address can open google maps and provide address directions
      ii. If you have a phone capable device selecting a phone number will dial the number for you.
   b. View Patient details and download previous clinical notes.

5. Select **Bill** button in top right hand corner to begin bill

New Bill without Appointment

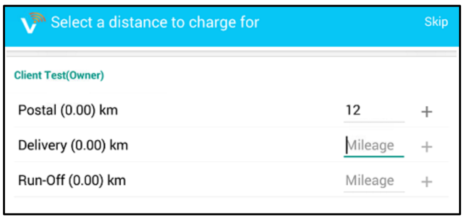
1. From the Main Menu click **Billing**.

2. A client search screen will open. From here you can either;
   a. Search for an Existing client by typing detail into search panel.
   b. Add new client by clicking '**+**' button.
      i. After bills for new clients have been merged to VetlinkPRO, upon first opening the bill in VetlinkPRO you will need to confirm the client is new or merge it to an existing client in VetlinkPRO.
   c. Click on the button with three vertical three dots to search for clients on VetlinkPRO database that have not been set to upload the Mobile device. Note you must have a data or Wi-Fi connection.
   d. Search by Patient by clicking **Patient Search** button then typing Patient details by typing into search panel.



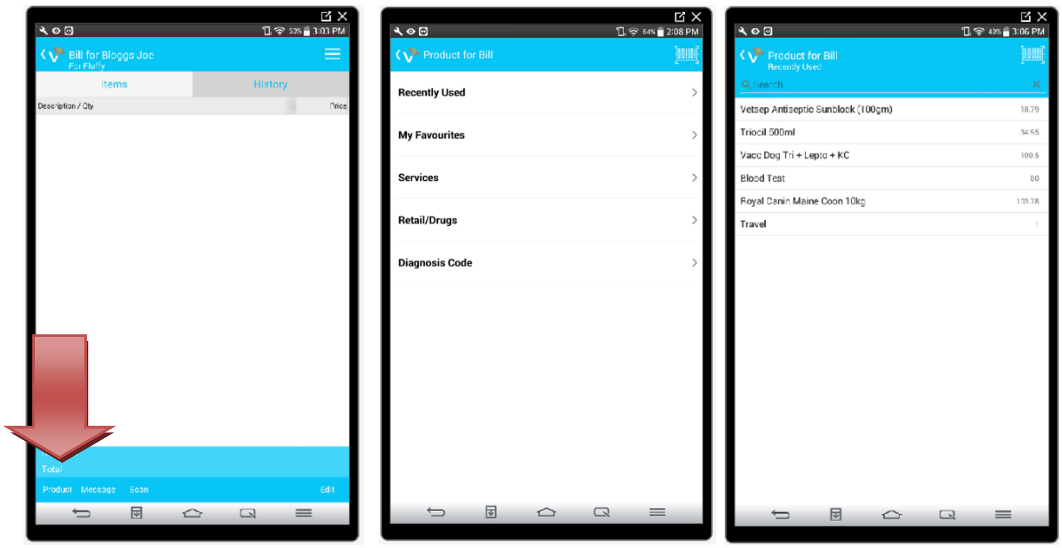
Adding Items to a Bill

1. Depending on your setup options, the first form you may see when starting a bill is the select mileage / travel form.
   - This form can be enabled / disabled in mobile app from **Utilities | Settings | User Configuration | Enable Add Travel Item**.
   - The travel charge will be taken from the first product with action of travel and To Mobile set to **Yes** uploaded to the app.
   - Distance is automatically populated from client records for the Owner / Charge To / Location set on the Patient record but can be overwritten.



2. To add an item to a bill either click the;
   - Product button: to search for an item.
   - Message: To type in a bill item message.
   - Scan: To scan the products barcode. **Note**: if it is a manufacturer's barcode this must have been linked to the product in VetlinkPRO first. A barcode scanner app must also be installed on your phone If you do not have a barcode scanning app you will need to download one. We have tested the Barcode Scanner app by ZXing Team.

3. If you select **Product** the product search method form.
   - Recently Used: Is automatically populated with the most recently used items.
   - My Favourites: You can populate a custom list of your favourite product so they are easily accessed. You can create your favourites list from **Utilities | Favourites | click + to add new item**.
   - Services: Shows and searches through items of type Service / Fee only.
   - Retail Drugs: Shows and searches through items of type Retail / Material / Drug only.
   - Diagnosis Code: Lets user choose reporting products. Reporting product have no stock on hand, prices or financial information and are used for recording statistics of occurrences of a case. E.g. Number of Mastitis cases.



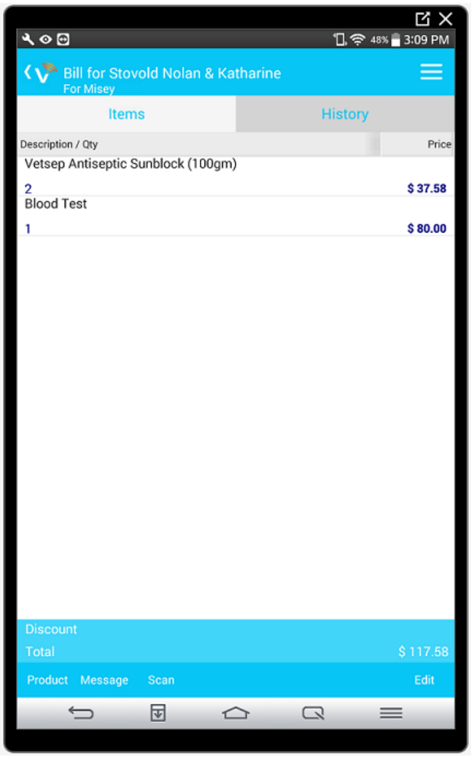
4. Choose the type of search method and all the products for that method will be displayed. You can select an item by either;
    - Selecting the item from the list
    - Typing in the product name into the search panel
    - Pressing the scan button in the top right hand corner and scanning the products barcode.

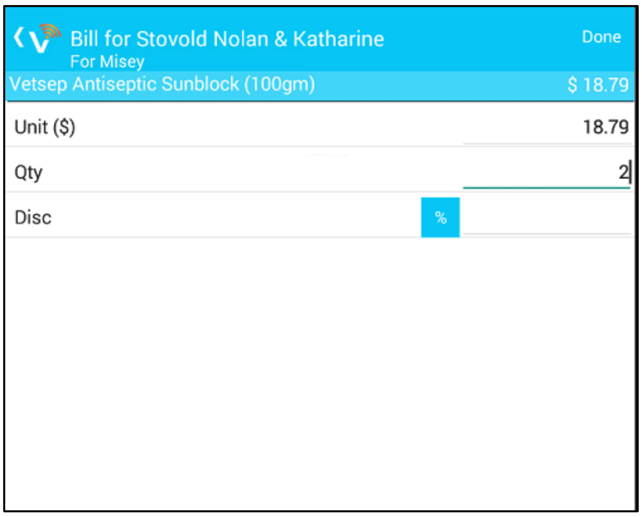
5. After selecting the item you can then edit the item details.
    - Unit ($): Can change the unit price if setup options in VetlinkPRO also allow users to change price.
    - Qty: Change quantity.
    - Disc: Add discount
    - Batch: Enter batch number via keyboard or scan the code on the box / container. Note batch number scanning is only available at present for Android devices. Products must also be set in VetlinkPRO to record batch and expiry by set **Use Expiry** to **Yes** under the more tab of the product record.
    - Expiry: Batch Expiry Date
    - Note: Users can type in a note to appear under that item on the billing for things such as withholding periods. If the product record in VetlinkPRO already has a withholding note this will be entered automatically.

6. Once items details have been edited click **Done** in the top right-hand corner.

7. Once all items are added click;
    - **Finish** to exit the bill. It can be synced immediately or at a later date if you still wish to edit it.)
    - **History** tab to enter written clinical notes or take photos.

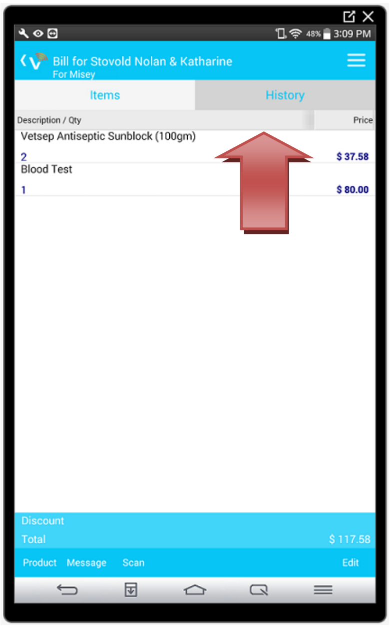
8. Once the bill is finished the appointment will show with a tick icon to indicate a bill has been done.

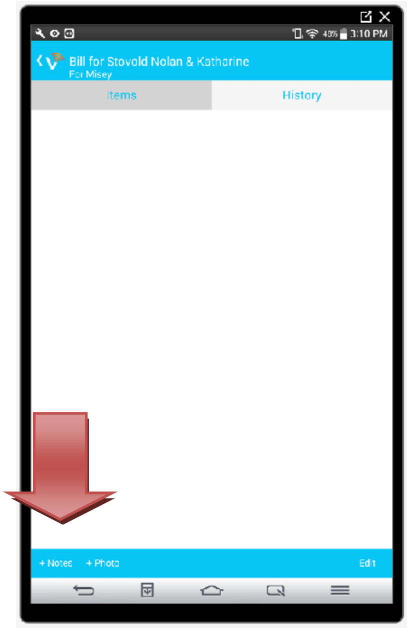




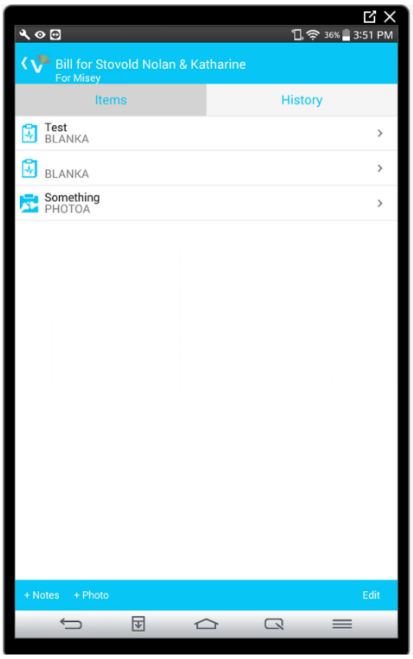
Adding Clinical Notes

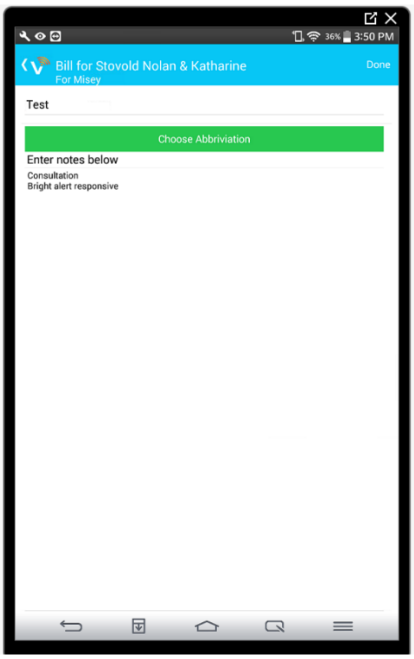
1. To add Clinical Notes from a bill click the history tab.





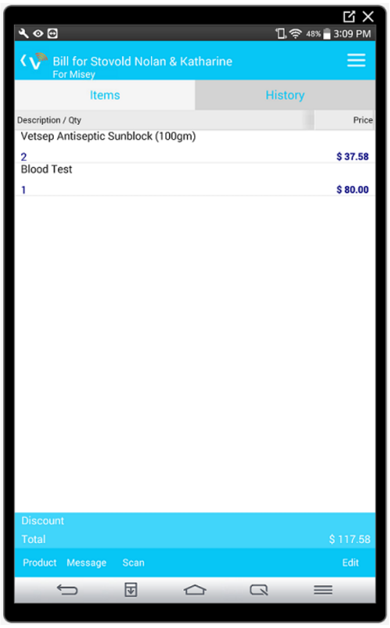
2. This will open the history form.
3. To add written clinical notes click the **+Notes** button in the bottom left hand corner.
4. Tap the summary field to enter the Summary / title for the notes
5. Tap the section below the prompt saying Enter Notes Below to add your written notes.
6. Click the **Choose Abbreviations** button to enter an abbreviation.
   a. Abbreviations can be set up on the app for quick entry of words, sentences or paragraphs.
   b. Abbreviations can be set up from **Utilities | History Abbreviation | Add …**

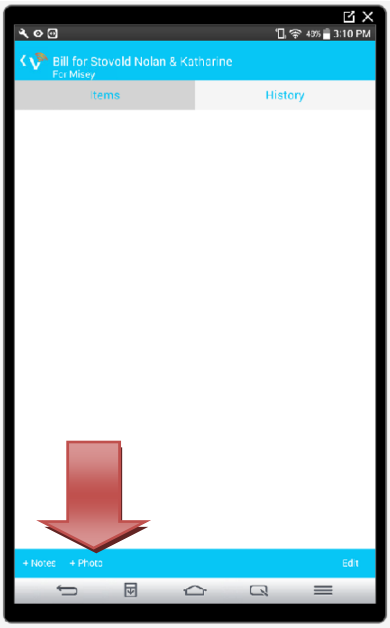




Adding Images to Clinical Notes

1. To add clinical Notes from a bill click the history tab.





2. This will open the history form.

3. To add images click the **+Photos** button in the bottom left hand corner.

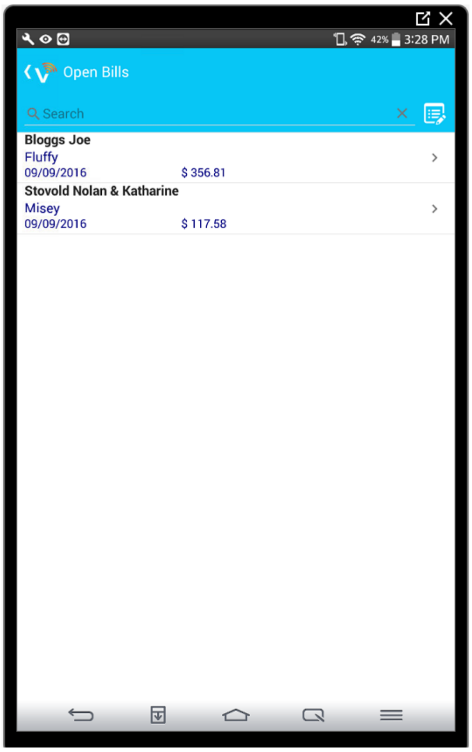
4. Tap the summary field to enter the Summary / title for the image.

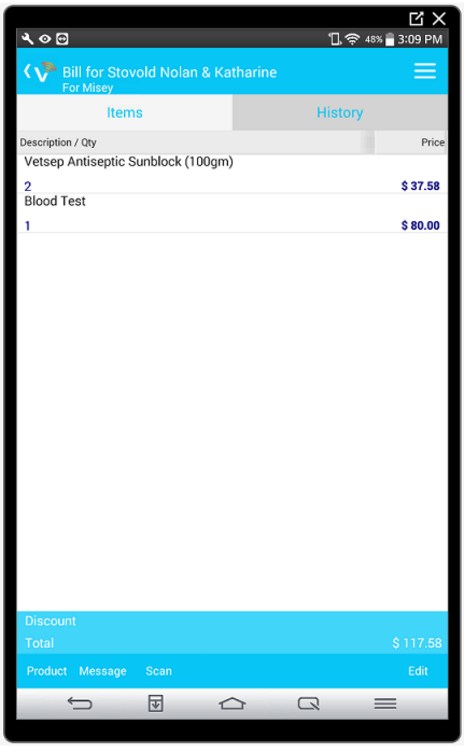
5. Either tap the;
   a. Camera icon to take a photo.
   b. Folder icon to choose an image stored on your device.

Editing Bills

All bills started on the Mobile app that have not yet been synced can be edited at any time.

1. From Main Menu click **Edit Bill.**
2. Select the bill you wish to edit.
3. The bill will open for you to edit.

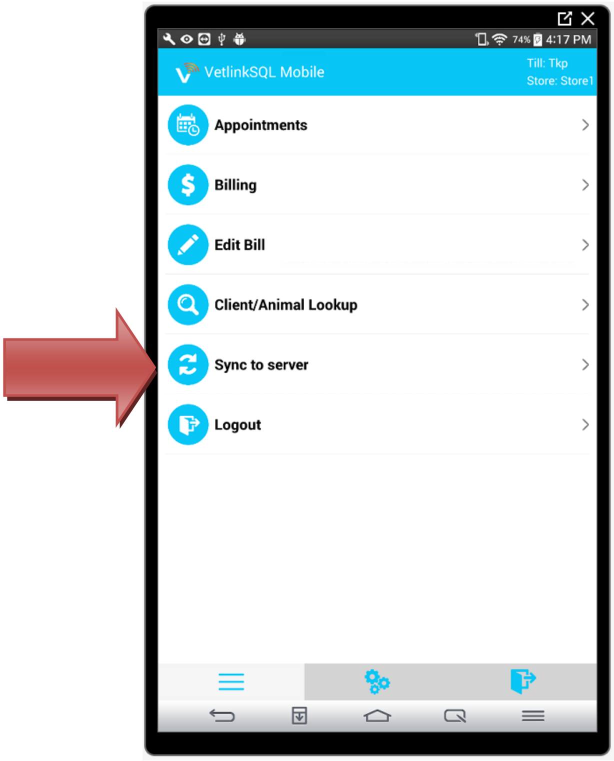


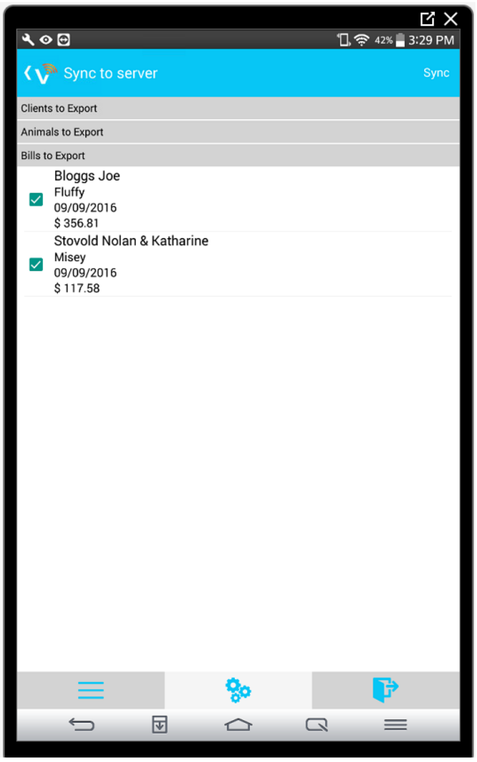


Syncing from Mobile App to VetlinkPRO Server

To sync data back to VetlinkPRO follow the steps below.

1. From the main menu click **Sync to Server**.
2. All bills will be shown and automatically ticked to sync.
3. If you do not wish to sync a bill so you can edit it further untick it.
4. Once ready click the **Sync** button in the top right hand corner.





Sync from VetlinkPRO Server to Mobile App

The Mobile app syncs data from server at various stages and places in the Mobile app to ensure the data is up to date.

Auto Sync on Start Up

Upon Logging into the Mobile Billing app VetlinkPRO can automatically sync data providing there is a data / Wi-Fi connection. This is enabled by default but can be edited from **Utilities | Setting | User Configuration | Enable Auto Sync.** Note that only changes are synced.

Sync Appointments from Appointment Form

To sync your appointment list for changes while you are logged into the app follow the steps below. Note that only changes are synced.

1. From the Main Menu go to **Appointments**.

2. Go to either Day or Agenda View
    a. From Day view: When you click the **Sync** button, in the top right-hand corner, appointments are automatically synced several days into the future as specified in **Utilities | Setting | User Configuration | Days to Sync Appointments ...**

Manual Sync from Utilities

While logged into the app you can choose to sync any group of clients / Patients, products, staff and appointments from Utilities. This function also allows the user to resync. This means EVERYTHING will re-synced again, not just changes as happens with the auto sync and appointment sync

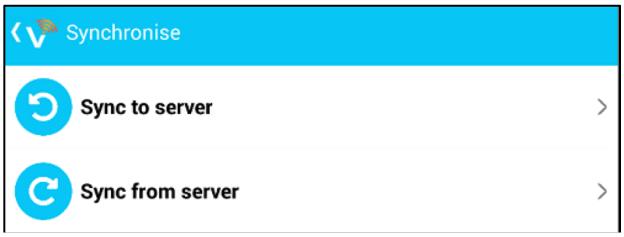
1. From Main Menu click **Utilities** icon at bottom of App.

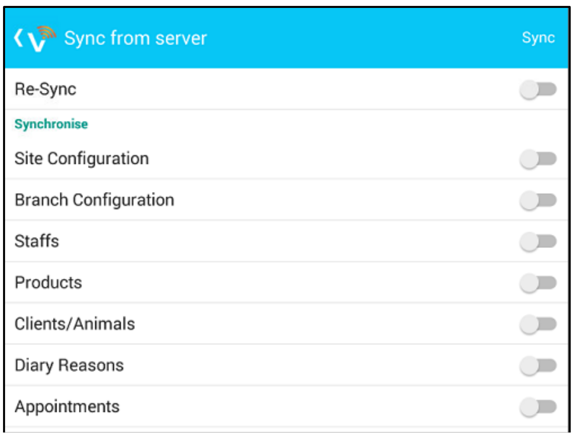
2. Select **Synchronise**

3. Select **Sync from Server**.

4. Enable the options you which to sync. (To Re-sync everything, not just changes, enable the **Re-Sync** option.)

5. Once ready click the **Sync** button.





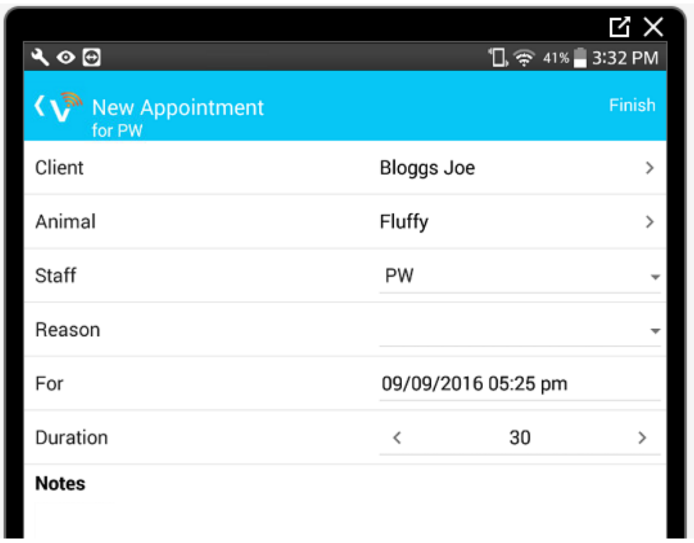
Making Appointments

The Mobile billing app allows staff members to make appointments for both themselves and other staff members. You will need to ensure security options in VetlinkPRO are enabled beforehand.

1. From the Main Menu click **Appointments**.

2. View appointment schedule and navigate to the date and time to make appointment.
    a. To change staff member click the staff initial in top right corner which will open a staff drop down list to choose from.

3. To make appointment either;
    a. Long press on diary at time you wish to make appointment
    b. Click **+** button in top left hand corner



4. Depending on setup options a client or Patient search screen will open. Select the client and Patient to make an appointment for.

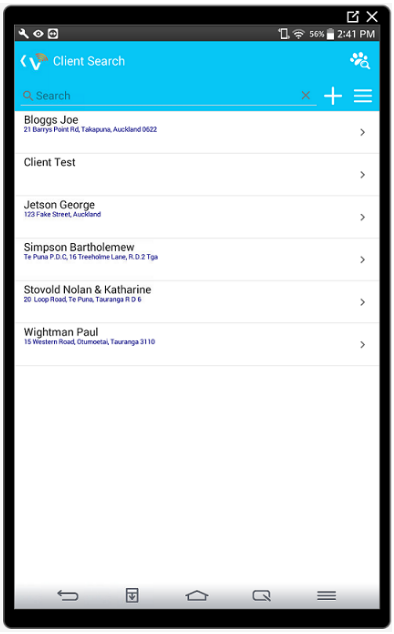
5. The appointment details creation screen will open. Enter the details for the appointment as needed and click **Finish**.

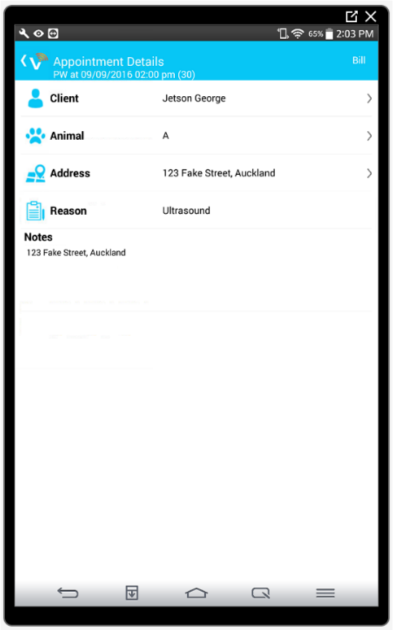
Client Lookup

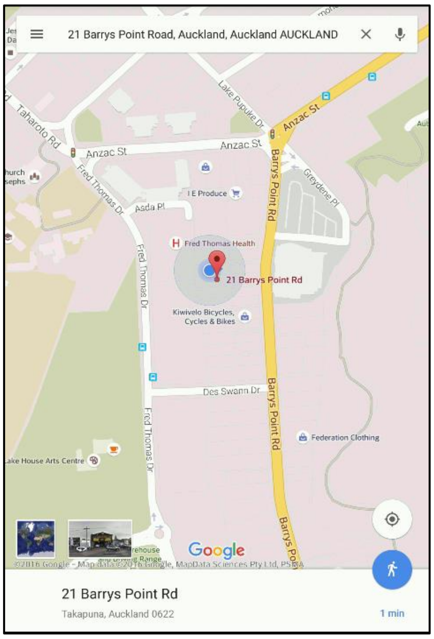
1. From the Main Menu click **Client / Patient Lookup**.

2. A client search screen will open. Either;
    a. Search for an Existing client by typing detail into search panel.

    b. Click on the button with three vertical three dots to search for clients on VetlinkPRO database that have not been set to upload the Mobile device. Note you must have a data or Wi-Fi connection and it must be enabled in the app from **Utilities | Setting | User Configuration | Live search.**







3. Once you have selected your client the client details will open.
    a. Selecting Address details will open google maps and provide directions providing there is a Wi-Fi or Data connection.
    b. Selecting a phone number will call the number providing your device can make phone calls.
    c. Selecting the email will open the default email program on your device to send an email.
    d. Selecting Patients will open the Patients owned by that client. From there you will be able to open the Patient details.

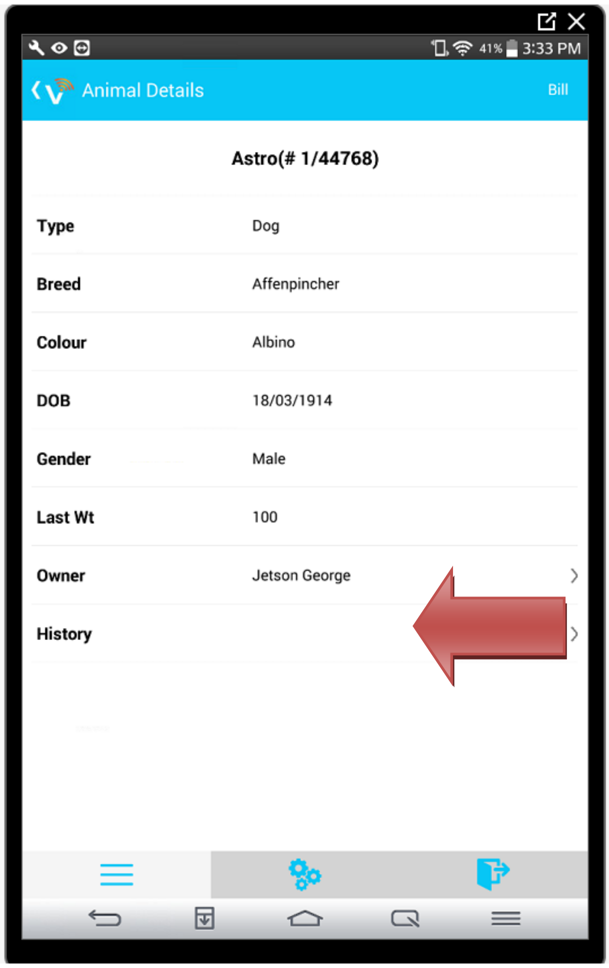
Patient Details and Clinical History Lookup

1. From the Main Menu click **Client / Patient Lookup**.

2. A client search screen will open. Either;
   a. Click **Patient Search** to change the search method to Patient
   b. Search and open the client then select Patients to view Patients and open the Patient you require.

3. The Patient Details form will open.

4. To view previous history select History
   a. Providing there is a Wi-Fi or data connection the most frequent histories will be downloaded.
   b. You can change the default number of previous histories downloaded from **Utilities | Setting | User Configuration | History Count ...**

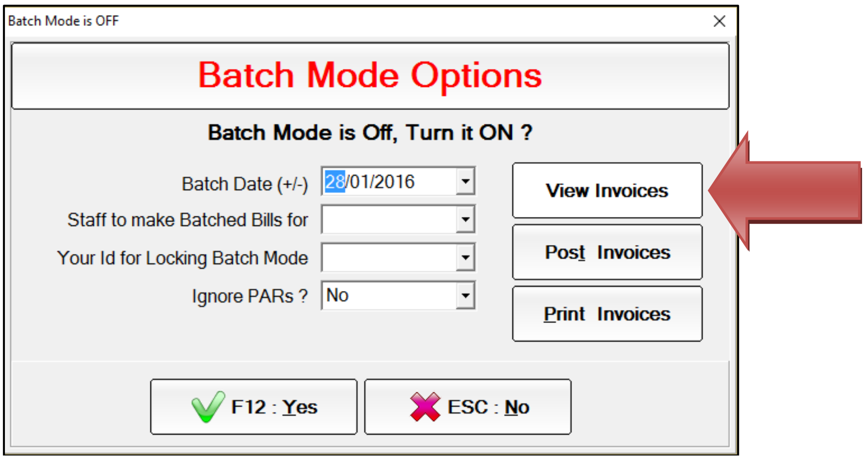


Posting Batch / Mobile Bills in VetlinkPRO

Once Mobile billing bills are synced back to VetlinkPRO they need then need to be processed and posted. All of the mobile bills must be opened in VetlinkPRO before they can be posted so functions not available in the mobile app such as reminders can be processed. To view and post batch bill follow the instructions below.

1. Go to the **Utilities** Menu then **Batch Mode**. (or press **Alt-B** on keyboard)

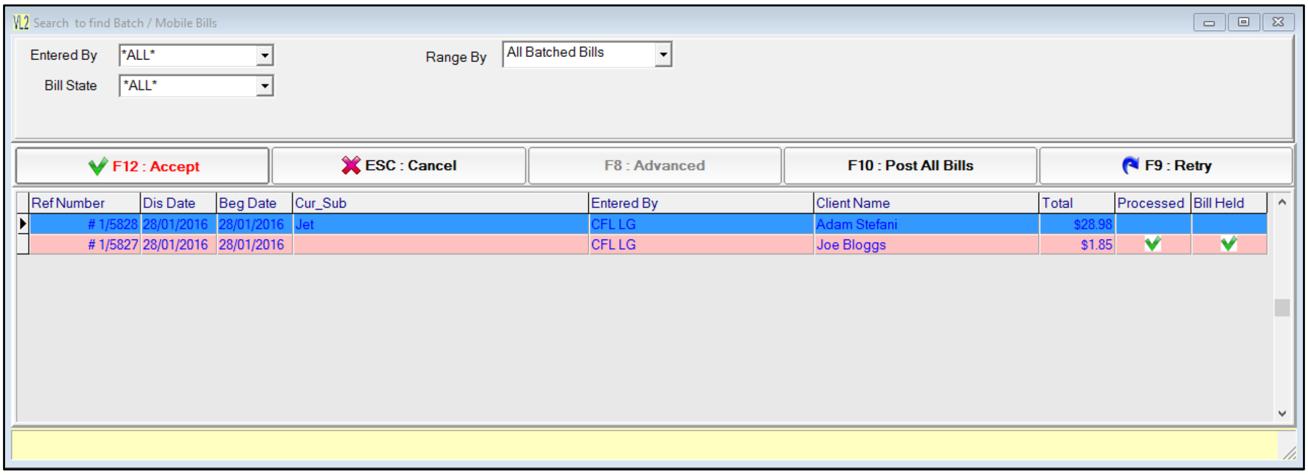
2. Click **View Invoices** from the Batch Mode Form



3. The Batch Bill and Mobile Bill invoice List will open.

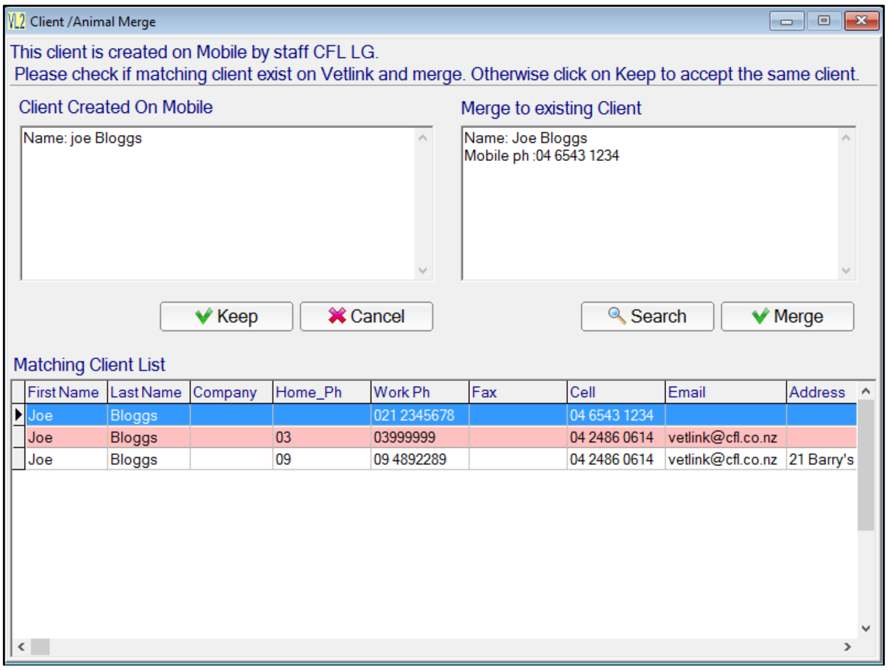
4. Choose filters to display the bill list
   - Leaving options as default and clicking **F12: Search** will display all bills
   - Selecting an **ID** in **Entered By** will show bills entered only by that staff ID. Mobile bills are identified by the device ID as opposed to staff ID
   - Selecting **Bill State** will displaying either Mobile or Batch Bill.
   - **Range By** will let you select a date range either by batch date or entry date.

5. Once bill are displayed Mobile bills will be displayed in blue. The processed column will show a tick if the bill has been opened in VetlinkPRO. Mobile bills must be opened in VetlinkPRO before they can be posted.



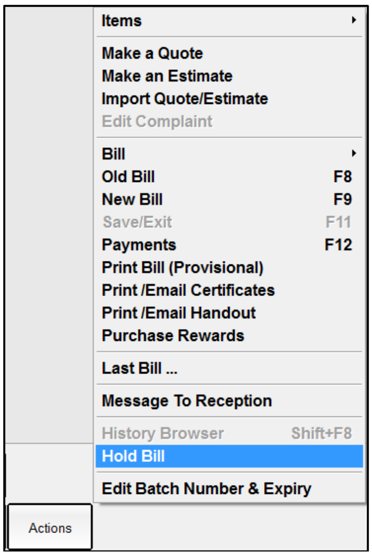
6. Open the bill you wish to process or edit.

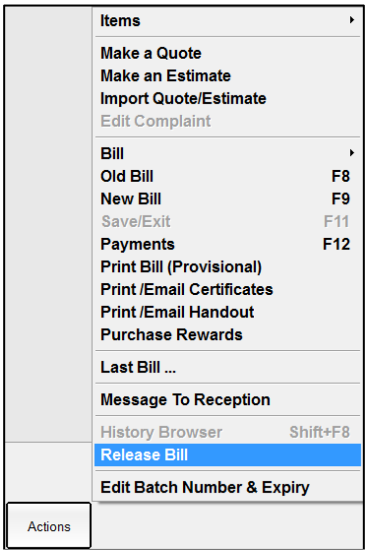
7. If the bill is for a new client created in the mobile a merge client screen will open.
    - Clients will similar detail will be displayed at the bottom of the screen.
    - If you need to merge the client select the matching client at the bottom of the form and then click the Merge button.
    - To create the new client click the Keep button.



8. The billing window will open. Any functions not found in the mobile billing app such as reminders will process. You can edit the bill as well if needed.

9. If you wish to edit the bill later and prevent it from being accidently posted you can mark the bill as held. To do this click the **Actions** button then select **Hold Bill**. To undo the hold open the bill again and click **Actions** then **Release Bill**. In the View Invoices form a tick will be placed in the Bill Held column to identify Held Bills.

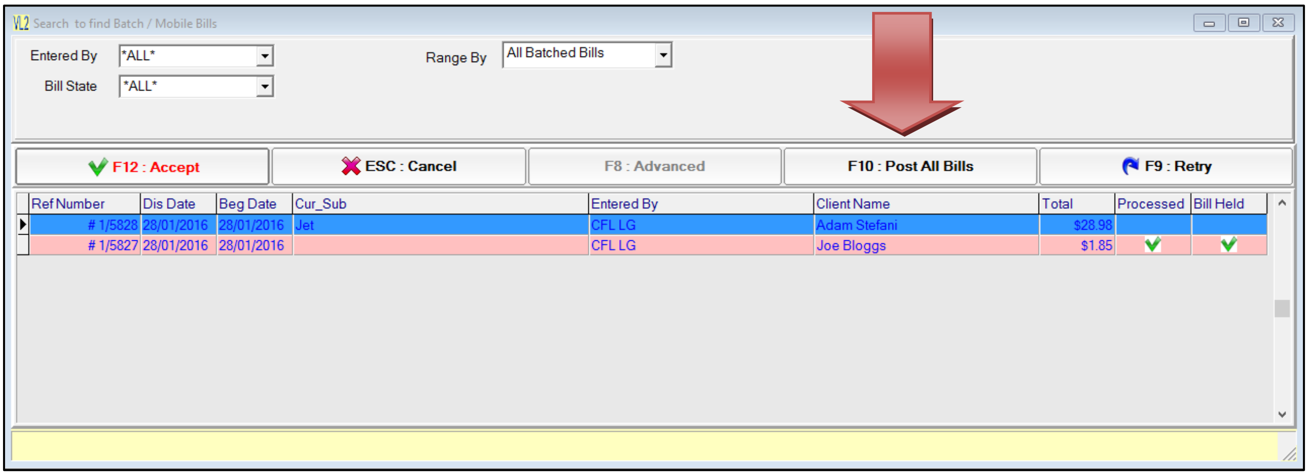




10. Saving / finishing the bill will vary depending on your setup options. Setup options can be found in **Options | Setup | Bill | Batch Mode**.

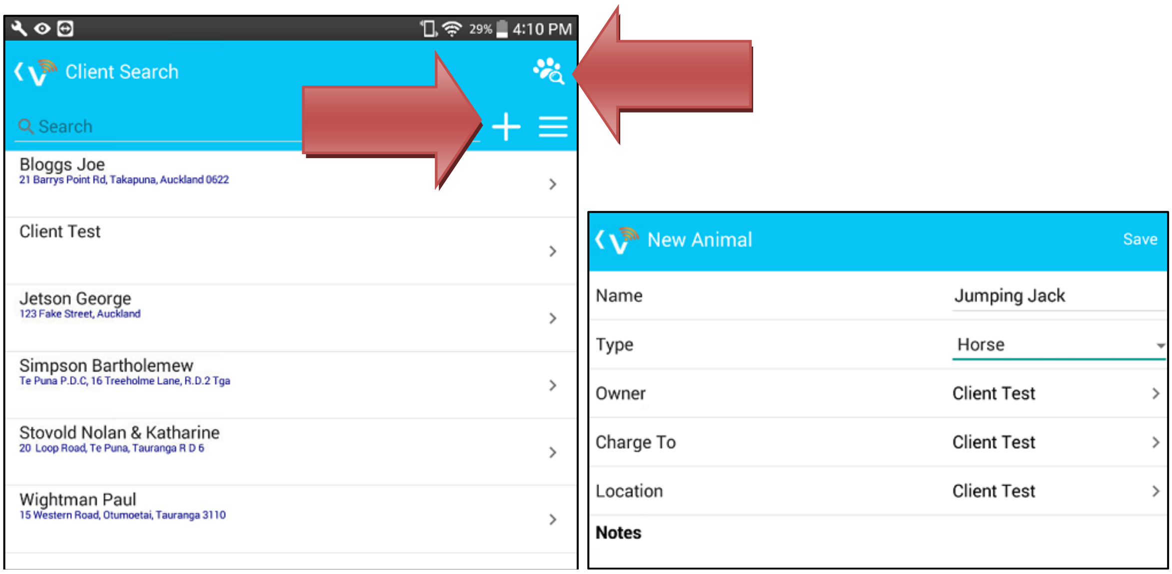
- Auto Post Bills in Batch Mode Ticked
    i. To save the bill click **F11: Save and Exit**
    ii. To take payment click **F12: Payment.** If the setup option Auto Pay on Batch invoices is unticked you will be able to choose the payment method, otherwise the payment will be defaulted to Charge.

- Auto Post Bills in Batch Mode Unticked
    i. To exit the bill click **F12: Payment.** If the setup option Auto Pay on Batch invoices is unticked you will be able to choose the payment method, otherwise the payment will be defaulted to Charge. The bill however will not be finished however and you will be able to edit later.
    ii. To post / finish the bills click **F10: Post All Bills** button. All bills showing in the list will be posted unless it is held or it is a mobile bill that has not been processed.

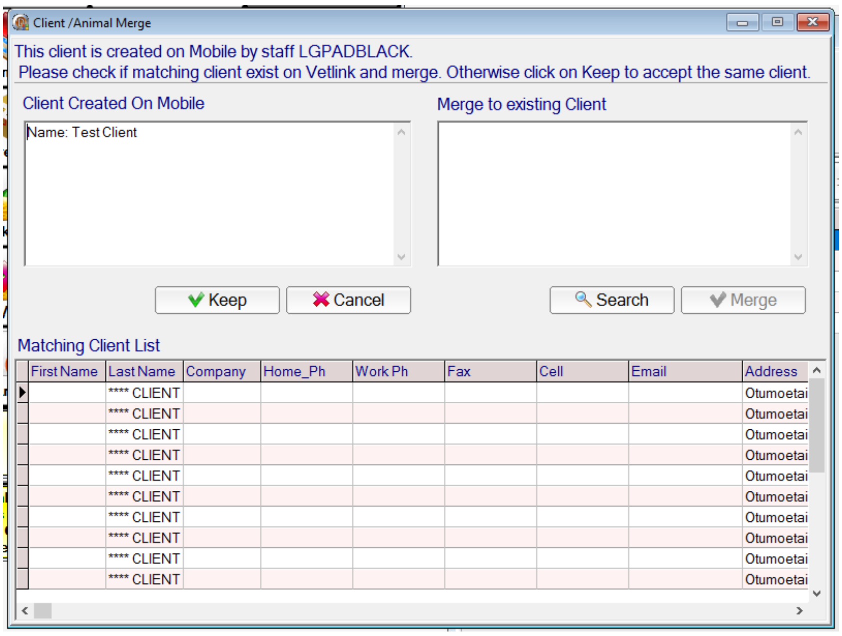


Billing an Patient without an Owner

1. From **Billing menu**.
2. Click **Patient search** then click the plus to add a new Patient.
3. Fill in Patient details but leave owner, charge to and location as "**test client**" unless you know these details.

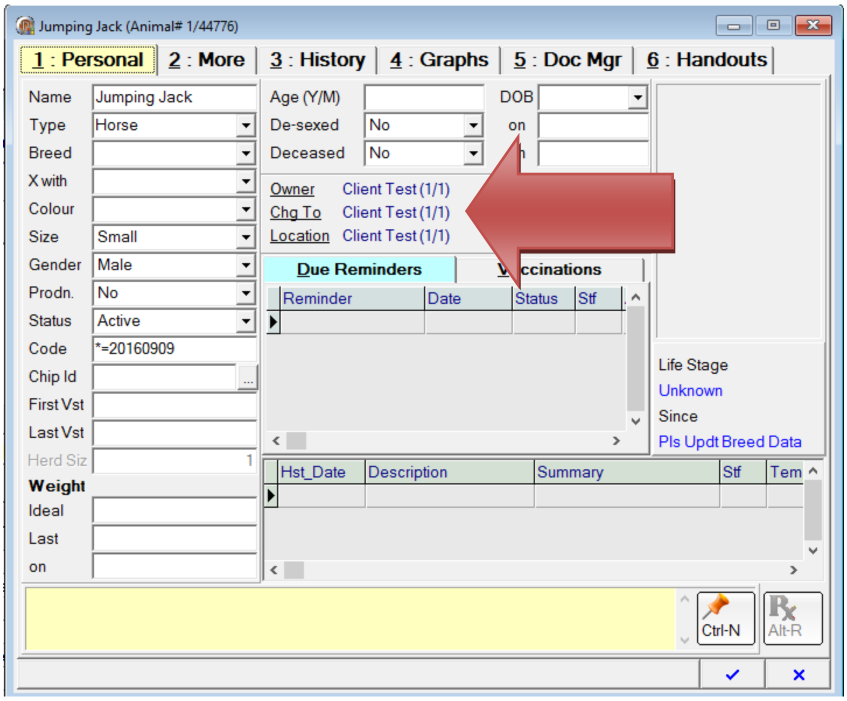


4. **Save** the Patient.
5. Do billing as per usual and Sync bill back to VetlinkPRO when ready.
6. Open Batch Mode, click **View Invoices** and select your invoice.
7. The Merge screen will open.



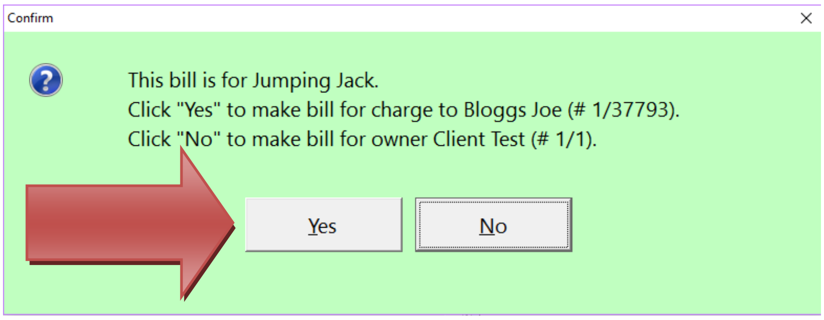
8. Click "**Keep**" to keep the client and then close client when it opens. (We will change client later)

9. Click "**Keep**" to Keep the Patient and when the Patient record opens, right click on each of **owner, charge to** and **location** to correct client records.



10. Save the Patient record.

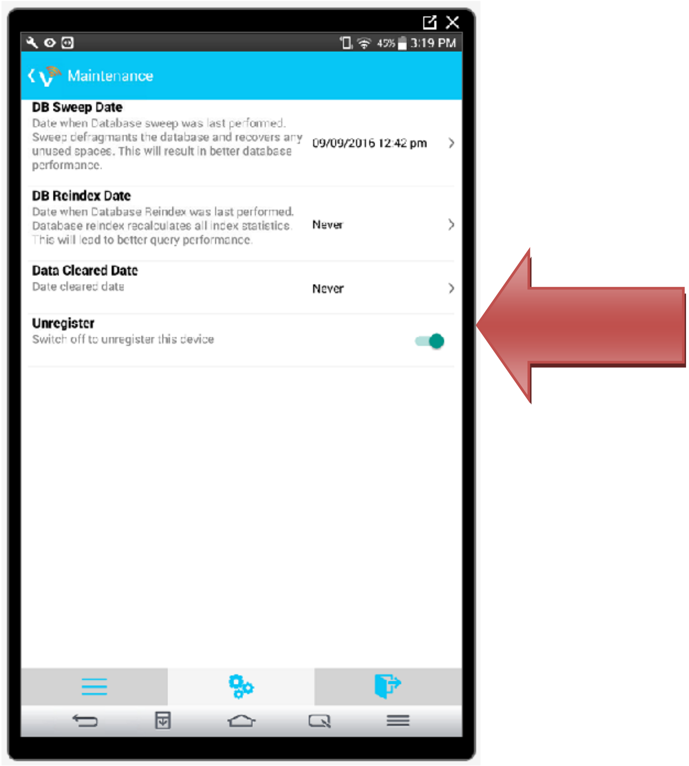
11. When the bill opens click **Yes** to bill to the Charge to client.



REPLACING / CHANGING DEVICES

To Mobile Billing app is registered to a device. Therefore before replacing a device you will need to unregister the Mobile Billing App from that device first.

1. From **Main Menu** go to **Utilities**.
2. Select **Maintenance**.
3. Select **Unregister**.
4. Data will be cleared and the device unregistered from the CFL cloud server.



MOBILE APP SETTINGS

The Mobile Billing App has various setup options that can be configured by the user. To edit these options go to **Utilities | Settings | User Configuration …**