

CLIENT PORTAL / MYVET APP

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OVERVIEW



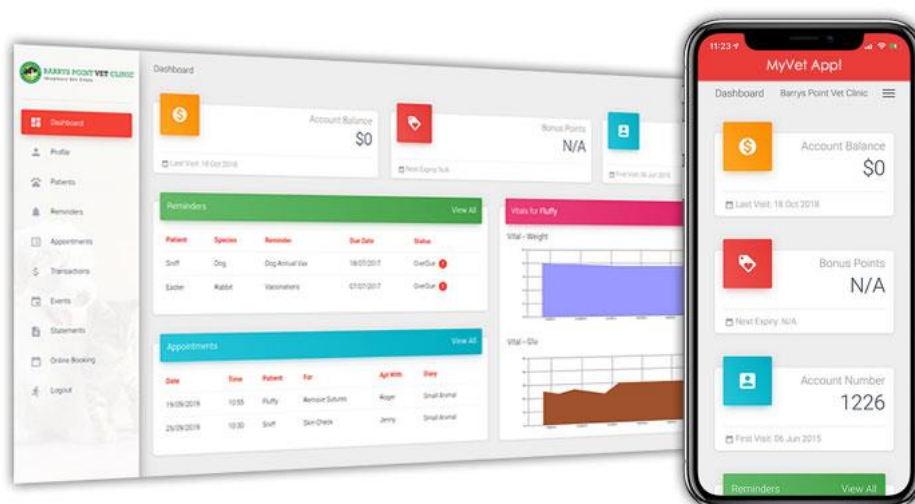
The Client Portal Web login / MyVet mobile app is an additional module that links to VetlinkPRO. For more information about enabling this module please contact sales@cfl.co.nz.

The Client Portal Web login / MyVet mobile app allows you to connect with your clients by providing a way for clients to log in and check their own client and patient data.

Clients will be able to view things such as client details, patient details, account balances, past transactions, upcoming patient reminders, upcoming appointments, bonus point totals and can also link to the online booking and statement portals if you have those enabled.

The Client Portal / MyVet app display the same information and have a similar look and feel. The MyVet app is just in a mobile friendly format.

To get started we recommend getting your staff to download and play with the MyVet app first to get familiar with how it works and test that everything works correctly. Once you are happy with the app you can then start introducing your clients to the app as they come in for consults, with brochures, by email / SMS broadcasts or through your website. Clients will a username and client number from VetlinkPRO to log into the app. This will be explained later in this document.



CLIENT PORTAL / MYVET APP ADMIN LOGIN

The Client Portal / MyVet app Admin Login lets the clinic admin set up Events and check the view the log of client logins. See events section below for information on events.

You can log into the clinic admin page from the www.Vetlinksq.com then the [Cloud menu](#) and [MyVet App Admin](#).

CLIENT LOG IN DETAILS

The username and password is stored under the **More tab** of the client record.

The email address will initially be used as the username and the password will be the client number (the number after the /).

Once logged in to the MyVet App or Client Portal the client can change the password themselves. The clinic can also update the details from the **More tab**.

The screenshot shows the 'More' tab selected for a client record. The 'User Code' field is highlighted with a red box and contains the text 'DALY'. The 'For Web Access' section is also highlighted with a red box and contains the following fields:

- Username: kieran@cfl.co.nz
- Password: (masked with dots)
- Reset: None (dropdown menu)
- Send Email (button)

The 'Privacy Policy' section is visible below the 'For Web Access' section, with a checkbox labeled 'Client has consented to clinic privacy policy*'. The 'General' tab is also visible, showing fields for 'Pref Staff', 'Batch Code', 'Recall', 'Group', 'Family', 'Category 1', and 'Category 2'.

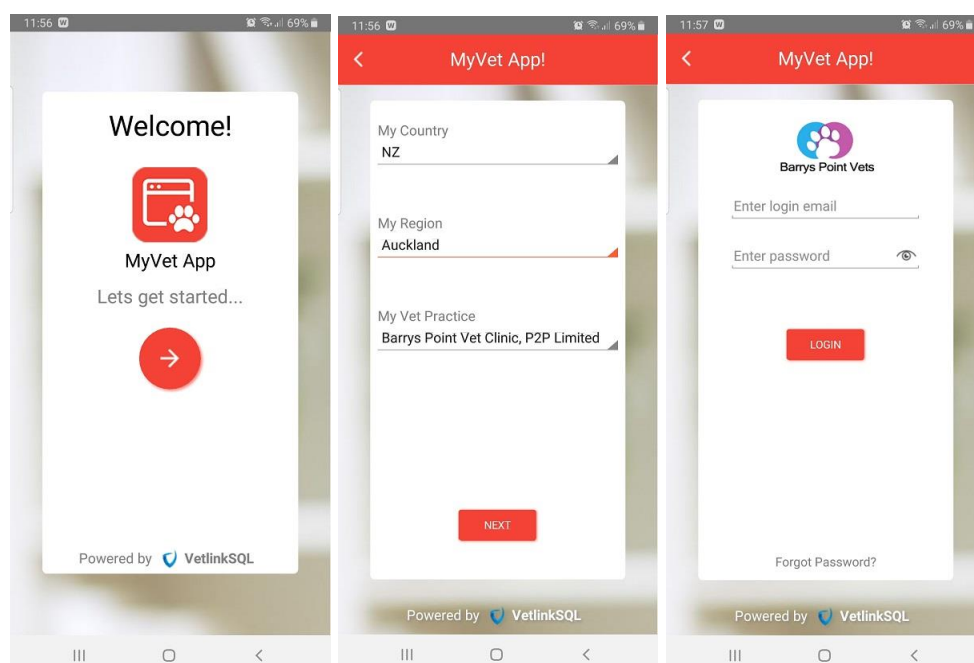
LINKING CLIENT PORTAL TO YOUR WEBSITE

Once you have signed up for the client portal you will be given a url to link into your website.

INSTALLING THE MYVET APP

1. The MyVet app can be downloaded from the Android or Apple store by searching for MyVet. Select the MyVet app by Computer Fanatics Ltd.
2. After downloading and opening the MyVet App It will load a “Lets get started” page. Click the red arrow to get started.
3. You will now need to select the Country, Region and then the Vet Clinic you visit.
4. Next the client will be asked to log in with their;
 - a. Username: Username is stored under More tab of client record. It is usually the email address.
 - b. Password: VetlinkPRO Client Number. If they do not know their password, the “Forgot Password” option will send their password to their email address. They can save their credentials so that frequent use does not require re-entering of their details.

Important: Information is uploaded to the MyVet overnight. Therefore, new clients may need to wait until the next day to be able to log into the app



USING CLIENT PORTAL / MYVET APP

Important: Information is uploaded to the Client Portal / MyVet app overnight. Therefore, new clients will need to wait until the next day to be able to log into the app. For existing clients, they will need to wait until the next day until any client information is updated as well.

Dashboard

After first logging into the Client Portal / MyVet app the client will be taken to the Dashboard. The dashboard contains a summary of the most relevant information for the client. It will contain;

- Account Balance
- Bonus Points available
- Account Number
- Upcoming Patient Reminders
- Upcoming Appointments
- Vitals such as Weight.



Additional Menus

Online Booking

If the clinic has subscribed to Online Booking, users will be taken to the online booking login page to make a booking.

Profile

The Profile option has all the client's personal details. The client can edit their details and click the **Request Update** button to request an update. The details do not update automatically, instead an email is sent to the clinic so a staff member can verify and manually update the details in VetlinkPRO themselves.

Patients

The Patients option will list all animals the client owns. Once a patient is selected, various drill down options are available with the ability for in-depth analysis, some of which are covered below

- **Summary:** This will show details for the patient such as name, species, breed, date of birth etc...The client can edit these then click the **Request Update** button to request an update. The details do not update automatically, instead an email is sent to the clinic so a staff member can verify and manually update the details in VetlinkPRO themselves.
- **Transactions:** This will show previous transactions/purchases for the patient.
- **Reminders:** This will show any due reminders for the patient.
- **Vitals:** Vitals refer to important information such as Temperature, Heart Rate, Weight, Glucose, and so on that have been recorded in VETLINKPRO.
- **Notes:** Standard patient clinical notes are NOT uploaded. However, there are special forms in VETLINKPRO with a web notes field that can be used to upload specific notes that the staff member chooses. This may be used for post-op or informative purposes that you wish the client to receive. The ALTWEBA , ALTNORME, AHESOAPA and AHENORMA forms support the web note field.

Reminders

Reminders for all patients can also be seen here.

Appointments

All future appointments can be viewed here.

Transactions

Client transactions for past purchases are listed here. Searches can be done by date range which will show invoices. Invoices can then be drilled down to provide more item details.

Events

Events are created by the clinic by logging into the Client Portal / MyVet Admin login. Once posted online, the Client Portal and MyVet app will automatically sync details of the event and show it for the end user. Examples of events would include Puppy Pre-School, Product Demonstrations, Open Days, and so on. The event can be created with a Name, photo, Description and Location.

Statements

The Statement option allows the user to access all historical and current monthly statements in PDF format, just as they can from their banking Apps! The statement function is only available to clinics who have subscribed to the Online Statement Feature.

Logout

Logs the client out of the MyVet app