GETTING STARTED

CONTENTS

VETLINKPRO SHORTCUT ICONS

The standard icons for the VetlinkPRO shortcuts are listed below.


VetlinkPRO


VetlinkPRO Setup


VetlinkPRO Browse

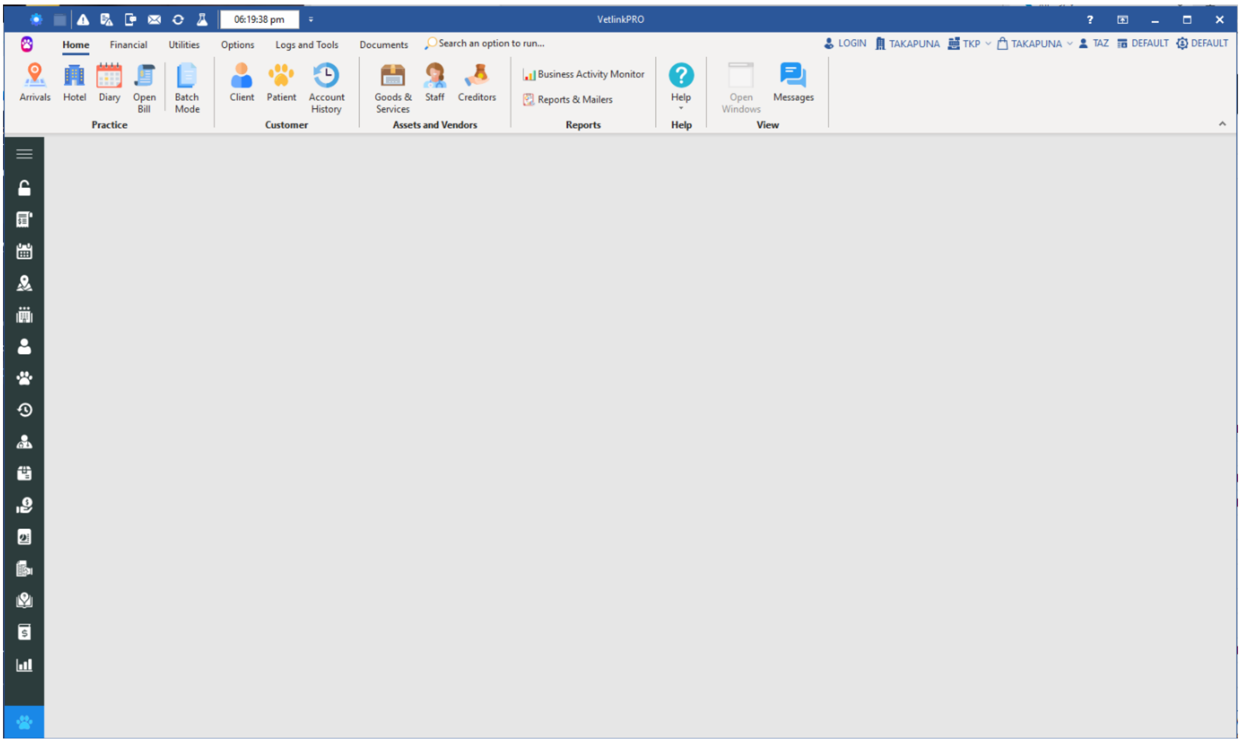

VetlinkPRO Play


VetlinkPRO Play Setup


VetlinkPRO Play Browse

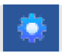
OVERVIEW OF THE VETLINKPRO INTERFACE

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 / Notification Bar, File Menu, Main Button Menu, Work area and the common toolbar. This chapter will describe each section in detail.



Title / Notification Bar

The **Title / Notification Bar** displays ten important icons that quickly let you know if something needs attention. If something needs attention, a red dot will show in the top corner of the icon and start blinking.

	Open Setup.
	View all open windows in a sidebar.
	View transaction errors, this includes bills, documents etc.
	Indicates whether background processes are running.
	A new SMS reply has arrived.
	A new Email message has arrived. (Not implemented)
	Recurring invoices that need posting.
	A new lab report has arrived and needs endorsing.
	Local time.
	Customize the quick access toolbar/ribbon.

Quick Access 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. Items can be added or removed from this toolbar.

File Menu

The file menu has two sections.

Top Right: Panels	This shows things like current store and till etc. It also has the user, your role and access level. Clicking on a panel allows you to change that item.
Main Area: Ribbon	Shows all items within the selected menu option.

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 all options within the selected category will appear in the ribbon. Depending on the window you currently have open in the Work Area, the menus available may change. For example, when a patient record is open a **‘Patient Actions’** menu will appear.

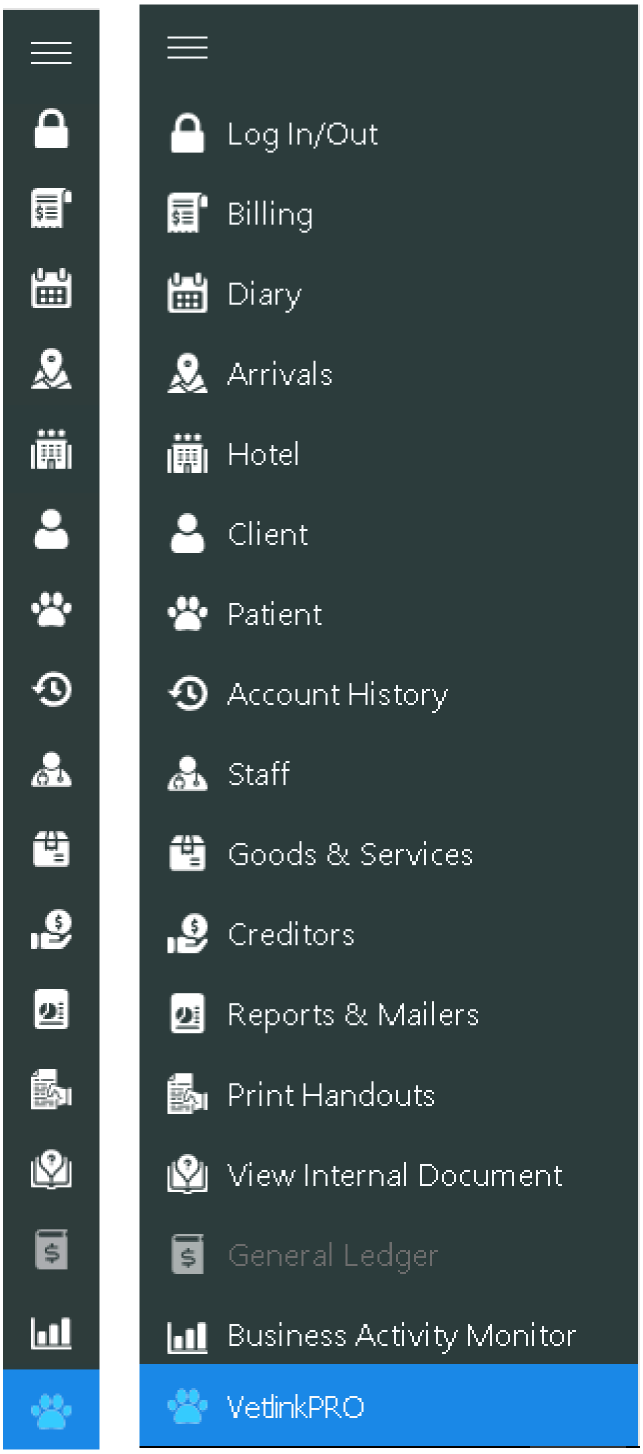
VetlinkPRO Icon	The **VetlinkPRO icon** file menu is used for fast keyboard navigation to our **Training Videos** and What’s New section.
Home	The **‘Home’** file menu has the most common additional features used such as arrivals, batch mode, messaging, and reports.
Financial	The **‘Financial’** file menu is where you will find the program financial features. One of the most important of these is the End of Period function; this is where the End of Day, End of Month and End of Year functions are located.
Utilities	The **‘Utilities’** file menu is where functions such as reminders, vouchers and health plans live.
Options	The **‘Options’** file menu is where the setup options for the application are found.
Logs and Tools	The **‘Logs and Tools’** file menu is where system logs and user specific setup options are found.
Lab Reports	The **‘Lab Reports’** menu will show all new incoming lab reports emailed from a Lab or sent from an IDEXX workstation.
Documents	The **‘Documents’** file menu is where creating and printing documents are handled.
Search	There is a search bar for searching functions within VetlinkPRO. This search bar does not search for clients, patients or products in your database.
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.

Panels

The panels have basic information about your Vetlink session. This includes who is logged in, where the bills are assigned to and where the stock will be coming from.

Login	This brings up the window where you can log in or out of VetlinkPRO. When signed in it shows your Staff ID instead.
Branch	This is the name of the clinic where VetlinkPRO is being run from.
Till	This is where the billing features within VetlinkPRO are assigining to costs to and sales from.
Store	This is where any stock will be taken from.
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	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. 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 reception computers automatically without changing the settings for the office computers.
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 deterimined by the administrator. For example, Junior Staff members can be excluded from accessing financial reports.
Idle At	The **Idle** time is when the current staff member will be logged out of VetlinkPRO if the computer is left idle.

Main Button Menu



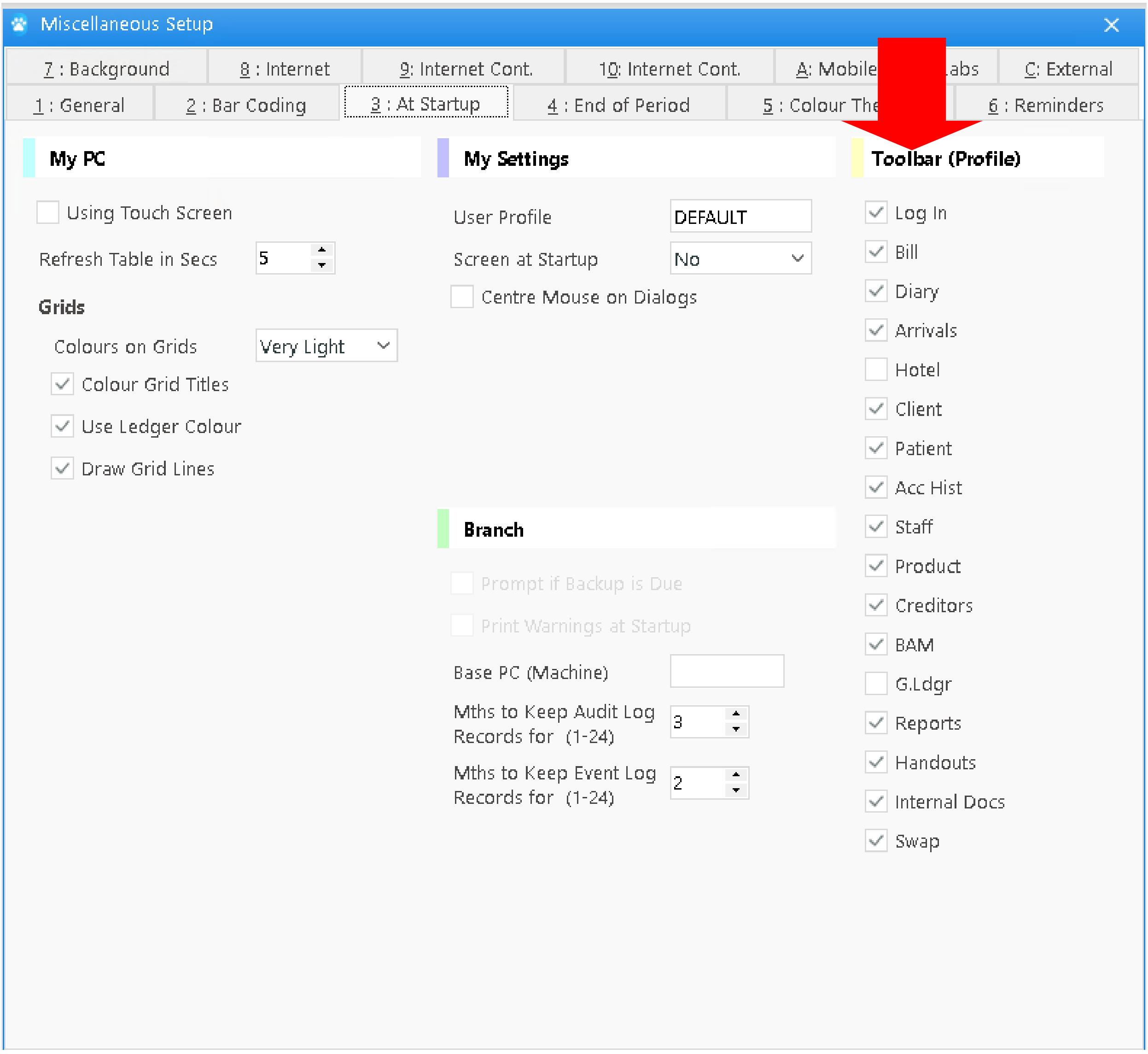
The Main Button Toolbar is where users can access the most commonly used functions in the system. Each button's function is listed in the table below.

	This button expands or minimises the Main Button Toolbar.
	The **'Log In/Out'** button brings up the Log in window to either log in or out of VetlinkPRO.

	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 us at sales@vetlinkpro.com.
	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 **'Patient'** menu button is used to access patient records. The patient record is where all patient related information is found. (For more information on the patient menu see the chapter on patient management).
	The **'Account History'** menu button is used for looking up all clients' 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. (For more information on the staff menu see the chapter on staff management).
	The **'Goods & Services'** button is used to search and access goods and services files. (For more information on the goods and services menu see the chapter on product management).
	The **'Creditors'** menu gives access to the ordering / invoicing module, this is where most inventory control is handled.
	The **'Reports & Mailers'** menu button is used to access the reporting and marketing module.
	The **'Print Handouts'** 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.
	The **'View Internal Document'** 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 **'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 us at sales@vetlinkpro.com.
	The **'Business Activity Monitor'** menu button is used to access the Business Activity Monitor Module. This is an optional module. If you wish to make this module active
	Shows which version of VetlinkPRO you are in. (Standard or Setup.)

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 | Tool Bar (Profile)**. 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.

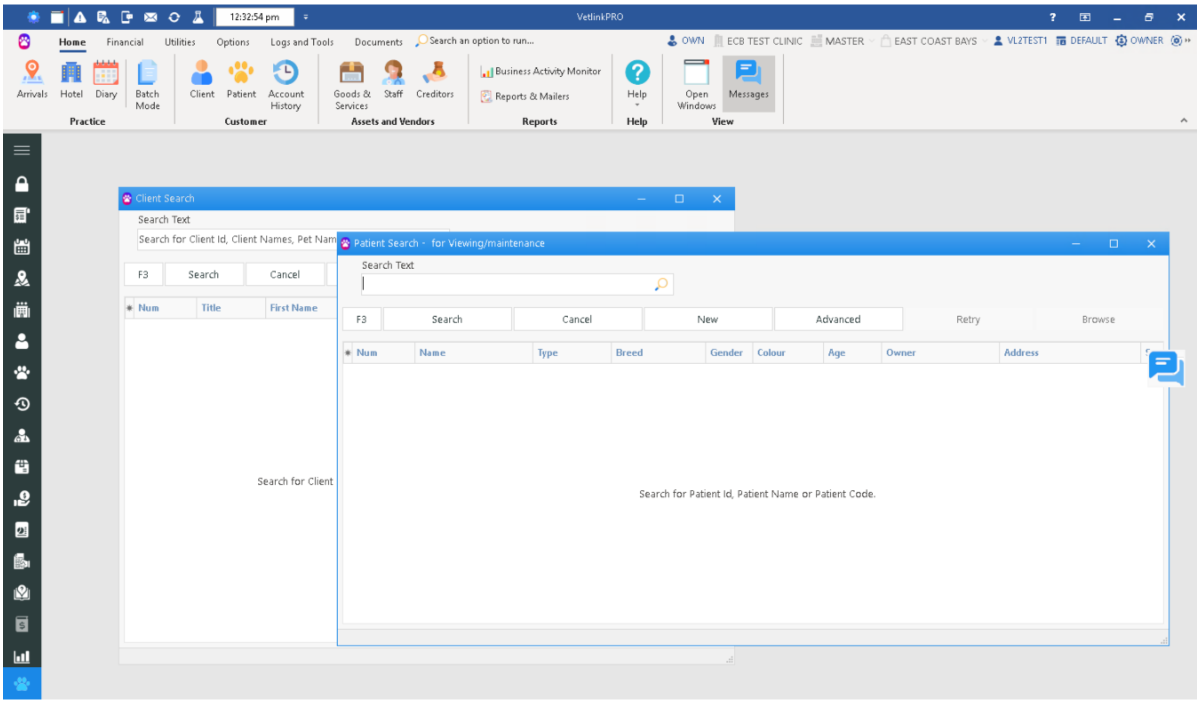


Work Area

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.



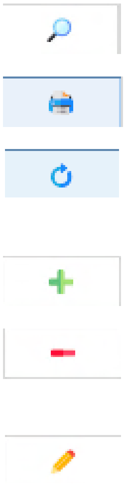
TIP: The **'Windows'** menu has many functions that help manage the work area when multiple windows are open. It lists all current windows that are open as well as providing an option to close all windows at once if the workspace has become too cluttered.

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 Categories 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

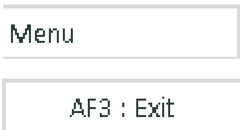
Print: This button will open a Print Menu that allows you to print forms and reports specific to this record

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.

Remove/Delete: This button removes/deletes certain elements from use. (This button may not apply to some screens.)

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.

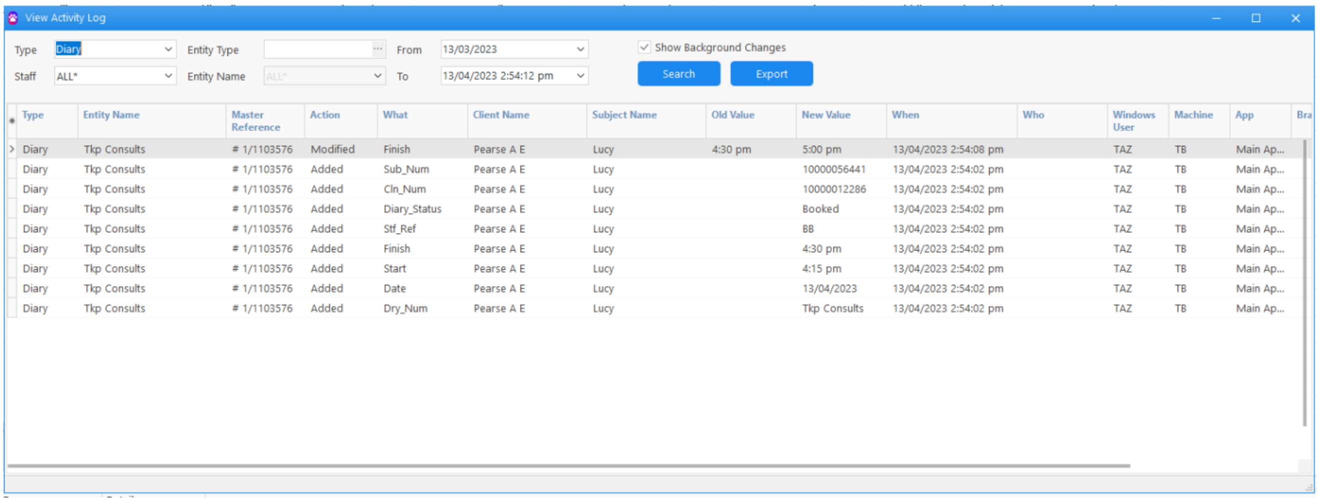


Menu: This button brings up a list of extra functions that are unique to the record that you are opening.

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

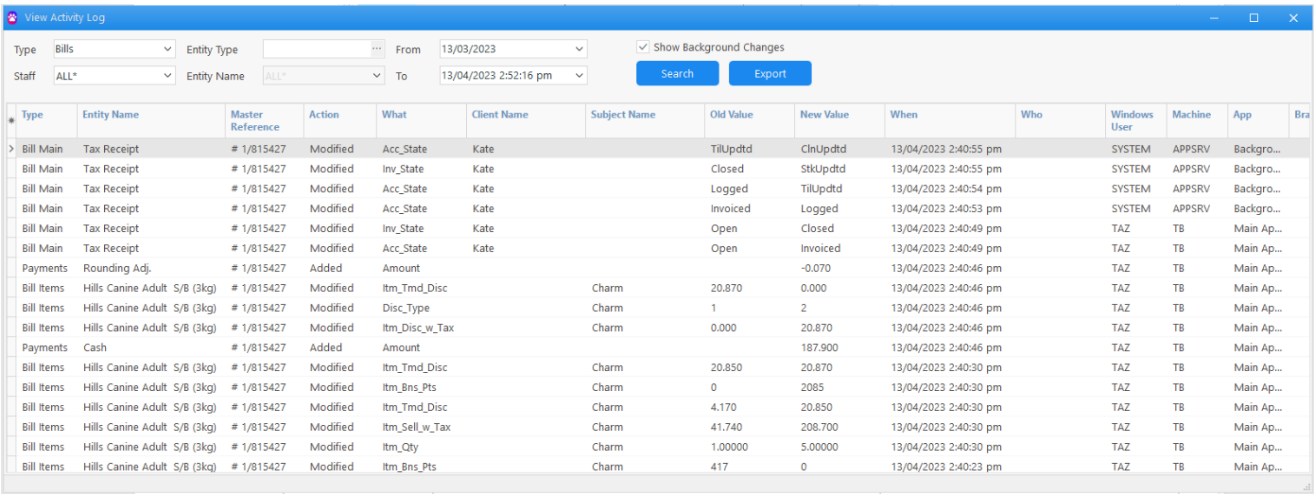
ACTIVITY LOG

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 **Menu** button then **View Activity log**. From an appointment you can right click on the appointment and select **View Activity log**.



Type	Entity Name	Master Reference	Action	What	Client Name	Subject Name	Old Value	New Value	When	Who	Windows User	Machine	App	Bra
Diary	Tkp Consults	# 1/1103576	Modified	Finish	Pearse A E	Lucy	4:30 pm	5:00 pm	13/04/2023 2:54:08 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Sub_Num	Pearse A E	Lucy		10000056441	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Cln_Num	Pearse A E	Lucy		10000012286	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Diary_Status	Pearse A E	Lucy		Booked	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Stf_Ref	Pearse A E	Lucy		BB	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Finish	Pearse A E	Lucy		4:30 pm	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Start	Pearse A E	Lucy		4:15 pm	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Date	Pearse A E	Lucy		13/04/2023	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	
Diary	Tkp Consults	# 1/1103576	Added	Dry_Num	Pearse A E	Lucy		Tkp Consults	13/04/2023 2:54:02 pm		TAZ	TB	Main Ap...	

Activity Log for appointment changes



Type	Entity Name	Master Reference	Action	What	Client Name	Subject Name	Old Value	New Value	When	Who	Windows User	Machine	App	Bra
Bill Main	Tax Receipt	# 1/815427	Modified	Acc_State	Kate		TilUpdtd	ClnUpdtd	13/04/2023 2:40:55 pm		SYSTEM	APPSRV	Backgro...	
Bill Main	Tax Receipt	# 1/815427	Modified	Inv_State	Kate		Closed	StkUpdtd	13/04/2023 2:40:55 pm		SYSTEM	APPSRV	Backgro...	
Bill Main	Tax Receipt	# 1/815427	Modified	Acc_State	Kate		Logged	TilUpdtd	13/04/2023 2:40:54 pm		SYSTEM	APPSRV	Backgro...	
Bill Main	Tax Receipt	# 1/815427	Modified	Acc_State	Kate		Invoiced	Logged	13/04/2023 2:40:53 pm		SYSTEM	APPSRV	Backgro...	
Bill Main	Tax Receipt	# 1/815427	Modified	Inv_State	Kate		Open	Closed	13/04/2023 2:40:49 pm		TAZ	TB	Main Ap...	
Bill Main	Tax Receipt	# 1/815427	Modified	Acc_State	Kate		Open	Invoiced	13/04/2023 2:40:49 pm		TAZ	TB	Main Ap...	
Payments	Rounding Adj.	# 1/815427	Added	Amount				-0.070	13/04/2023 2:40:46 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Tmd_Disc		Charm	20.870	0.000	13/04/2023 2:40:46 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Disc_Type		Charm	1	2	13/04/2023 2:40:46 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Disc_w_Tax		Charm	0.000	20.870	13/04/2023 2:40:46 pm		TAZ	TB	Main Ap...	
Payments	Cash	# 1/815427	Added	Amount				187.900	13/04/2023 2:40:46 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Tmd_Disc		Charm	20.850	20.870	13/04/2023 2:40:30 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Bns_Pts		Charm	0	2085	13/04/2023 2:40:30 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Tmd_Disc		Charm	4.170	20.850	13/04/2023 2:40:30 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Sell_w_Tax		Charm	41.740	208.700	13/04/2023 2:40:30 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Qty		Charm	1.00000	5.00000	13/04/2023 2:40:30 pm		TAZ	TB	Main Ap...	
Bill Items	Hills Canine Adult S/B (3kg)	# 1/815427	Modified	Itm_Bns_Pts		Charm	417	0	13/04/2023 2:40:23 pm		TAZ	TB	Main Ap...	

Activity Log for bill changes