

# STAFF MANAGEMENT

## CONTENTS

<b>Overview .....</b>	<b>2</b>
<b>How to Enter New Staff Members .....</b>	<b>2</b>
<b>How to Edit / View Staff details.....</b>	<b>4</b>
<b>Handling Staff Rosters .....</b>	<b>5</b>
How to Set / Edit Staff Rosters.....	5
Removing Staff from the Diary .....	7
<b>Adjusting Staff Rosters.....</b>	<b>8</b>
Adding Staff on a Non -Rostered Day .....	8
Altering Staff Hours on a Single Day.....	8
Staff Holidays .....	9
<b>How to View Staff Sales History .....</b>	<b>10</b>
<b>Staff Access Levels.....</b>	<b>11</b>
Step 1: Create Access Levels .....	11
Step 2: Assign Access Rights for Each Access Level .....	12
Step 3: Assign Staff Members an Access Level and Password.....	12
Step 4: Setting the Idle Logout and Application Shutdown Times	13
Access Level Descriptions .....	15
<b>Staff Performance and Statistics.....</b>	<b>19</b>
Set Target and Shop Statistics .....	20
<b>Staff Positions .....</b>	<b>21</b>
<b>Staff Appointment Upload to Google Personal Calendar .....</b>	<b>22</b>
<b>Insert Staff Digital Signature.....</b>	<b>25</b>

## 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.

[SB] Grant Austin (Staff # 1/6 Cln # 1/2107)

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

Title / Gnd: Dr. Male  
 Last Name: Grant  
 First Name: Austin  
 Known As:   
 Co Name:   
 DOB:   
 Status: Active  
 Staff ID: SB  
 Work: 06  
 Home: 06 8772962  
 Fax: 06  
 Mobile: 0210666200  
 Phone 1: 06  
 Phone 2: 06j5  
 Phone 3: 06  
 Email: nada2107@cfl.co.nz  
 Email Work: nada2107@cfl.co.nz  
 Web:

7 : Postal   8 : Delivery   9 : RunOff

Building:   
 St Num: 4  
 Street: Carlyle Street  
 Suburb: Havelock North  
 City:   
 Post Code: 4130  
 Distance: 0 km  
 Care of:   
 Address Notes:

3 Mth + \$70.39   Future Bills: ...  
 2 Mth \$0.00   \$0.00  
 1 Mth \$0.00   Credit:   
 Current \$0.00   \$0.00  
 Total \$70.39   ...  
 Open \$0.00   ...  
 Batched \$0.00   ...  
 Total \$70.39

	Num	Name	Type	Breed	Colour
>	1/51434	After Hours Phone	Various		
	1/42455	Annual Leave	Various		
	1/64850	Asha	Cat	Burmese	Blue
	2/15810	Away	Various		
	2/12112	Back Up Vet	Various		
	2/12951	Brian	Cat	Burmese	Red
	1/56682	Conference	Various		
	2/12205	DOAD	Various		

Menu   AF3 : Exit

# 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 **'Search'** to begin the search.

<b>ID</b>	The staff members' ID / username
<b>First Name</b>	The staff member's first name.
<b>Last Name</b>	The staff member's first name.
<b>Status</b>	Whether the staff member is <b>'active'</b> or <b>'inactive'</b> .
<b>Working</b>	Whether the staff member is rostered onto a diary. Set this to <b>'Either'</b> 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 **'Accept'** key to select.
6. Edit the staff details as required and click on the tick button to save.

# HANDLING STAFF ROSTERS

The staff roster's 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 **'Roster'** button.
5. The **'Weekly Timetable'** will open.

Tipene Aroha (# 1/99) Weekly Timetable

< Prev Diary Tkp Consults (Takapuna) Next Diary >

☒ Allocate to this diary ☐ Auto email appointments Timetable is static

Timetable 1 Timetable 2 Timetable 3 Timetable 4 Timetable 5 Timetable 6 Timetable 7 Timetable 8 Timetable 9

Type: Normal Start On: 5/12/2011 Weeks: 1 Expire After: 1/12/2011

Day	Rostered	Multi-Book	Period 1		Period 2		Period 3		Period 4		Period 5	
			Start	Finish	Start	Finish	Start	Finish	Start	Finish	Start	Finish
Sunday	<input type="checkbox"/>	<input type="checkbox"/>										
Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07:00	12:00								
Tuesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07:00	12:00								
Wednesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07:00	12:00								
Thursday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07:00	12:00								
Friday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07:00	12:00								
Saturday	<input type="checkbox"/>	<input type="checkbox"/>										

Save Cancel Exit

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 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.

<b>Normal</b>	Where you would enter your normal / every day roster. Must be used for revolving rosters
<b>Holiday</b>	The holiday timetable takes precedent over any other timetable. It kicks in on the ' <b>Start On</b> ' date and runs until the ' <b>Expire After</b> ' 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 tick 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 **'Roster'** 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 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.

If you need to inactivate the staff member as well, continue with the instructions below: (This does not inactivate their client file, only their staff file.)

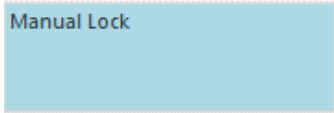
10. Next click on the **'1: Personal'** tab.
11. Change the **'Status'** field to **'Inactive'**.
12. Click on the tick button to save changes.
13. Once the background has processed the staff member should be removed from the diary. If the staff member still appears on the diary and their name appears 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. On the diary you would like the staff member added to, go to **Staff | Add Staff**.
2. Search for the staff member you wish to add and click **'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.



Manual Lock

## 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 member's **'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 the diary allocates the staff rosters the **'Not Working'** times in blue will not be moved.



## Staff Holidays

You can set up holidays for staff that will override their schedule on the set days and mark them as not working.

To add a holiday for a staff member:

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 **'Holidays'** button. The holidays window will open and any currently set holidays will show as a list.
5. Click on the green **'+'** icon.
6. Select the start and finish date for the holiday and add any notes.
7. Click the green tick then the accept button to save your selection.

## HOW TO VIEW STAFF SALES HISTORY

1. Click on the **'Staff'** icon and search for the staff member you would like to view sales for.
2. Once the staff record is open click on the **'6: History'** tab.
3. 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).

[MG] Middleton Andrew Little (Staff # 1/78 Cln # 1/17444)

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

Date From: 10/04/2023   Date To: 10/05/2023

Category-1:   Category-2:   Prd Class:   Client:   Patient:   Product:   Search

* Date	Qty	Item	Sell (Excl.)	GST	Sell (Incl.)	Category-1	Category-2	Class	First Name	Last Name	Co Name
> 8/05/2023	1	Hills Canine Adult	20.74	3.11	23.85	C/AFOOD	C/AFOOD DOG	R	Ali	AAZurcheraa	THUND
24/04/2023	20	Antirobe Capsules	15.97	2.39	18.36	C/AANTIBIOT	Default	D	Josie		
17/04/2023	13.153	Surgery Dog	117.66	17.65	135.31	DOG	C/A DOG	S	Lisa		
17/04/2023	1	Castration Dog Code	0	0	0	DOG	C/A DOG	S	Lisa		
17/04/2023	1	Betamox L A Inj	0.7	0.11	0.81	C/AANTIBIOT	Default	D	Lisa		
17/04/2023	10.187	Surgical Materials	11.39	1.71	13.1	C/ASURG	Default	M	Lisa		
17/04/2023	7.5	Anaesthetic Gaseous C/A	20.93	3.14	24.07	C/AFEES	Default	S	Lisa		
17/04/2023	1	Bp Castration Dog Small	1.12	0.17	1.29	DOG	Default	S	Lisa		
17/04/2023	0.5	Ketamine 10% Phoenix	2.3	0.34	2.64	C/AANAES/SE	Default	D	Lisa		
17/04/2023	0.5	Diazepam Ilium	2.42	0.36	2.78	C/AANAES/SE	Default	D	Lisa		
13/04/2023	3	Hills Canine Adult S/B	98	14.7	112.7	C/AFOOD	C/AFOOD DOG	R	Andrea	Andrews	

Menu   AF3 : Exit

# 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 **'Role 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 **'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 a 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.

The screenshot shows the 'Staff Setup' dialog box with the 'Options' tab selected. The 'Access' sub-tab is active, displaying settings for three levels: General (Profile), General (Branch), and Remote History Browser (Branch). Each level has a 'General' section and an 'Access' section. The 'Access' sections contain checkboxes for 'Login Required for Use' and 'Auto Exit After Idle Time', along with spinners for 'Minutes of Idle before Logout' and 'Minutes before Exit'.

Level	Section	Option	Value
General (Profile)	General	Search Dialog	Simple
		Search Key	ID
	Access (Group)	Login Required for Use	<input type="checkbox"/>
		Auto Exit After Idle Time	<input type="checkbox"/>
General (Branch)	General	Show Staff Balances	<input checked="" type="checkbox"/>
		Show Staff Performance GST Inc.	<input type="checkbox"/>
	Access (Branch)	Login Required for Use	<input type="checkbox"/>
		Auto Exit After Idle Time	<input type="checkbox"/>
Remote History Browser (Branch)	General	Allow Access	<input checked="" type="checkbox"/>
		Change Password for Price Display	<input type="text"/>
	Access (PC)	Login Required for Use	<input type="checkbox"/>
		Auto Exit After Idle Time	<input type="checkbox"/>

**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 in Picklist Setup
Staff Maintenance		X	Maintain Staff related information such as Categories in Picklist Setup
Product Maintenance		X	Maintain Product related information such as Categories and Profiles in Picklist Setup
History Maintenance		X	Maintain History related information in Picklist Setup
Diary Maintenance		X	Maintain Diary related information such as Profiles in Picklist Setup
Hotel Maintenance		X	Maintain Hotel related information such as Profiles and Rooms in Picklist Setup
Patient Maintenance		X	Maintain Patient related information such as Profiles, categories, breeds and colours in Picklist Setup
Supplier Maintenance		X	Maintain Supplier related information in Picklist Setup
GL Maintenance		X	Maintain General Ledger related information in Picklist Setup
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	For Retail Only branch or profile, allows exchange item in billing
Cancel Billing		X	Cancel a bill
In House Transactions		X	Make In-house usage bills
Bill Refunds		X	Refund client bills
Change Bill		X	Change client/Patient on bills
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
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
Reports / Lists	X	Ability to run reports from the reports / lists group
Export/Spreadsheets	X	Ability to export to excel
Mailer Automation	X	Automate reports
Client Edit	X	Maintain Client Records
Client Create	X	Create new clients
Client Inactivation	X	Inactivate client records
Client Discount	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 Write-Off	X	Write off bad debt/credit
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 Records
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 Documents, 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

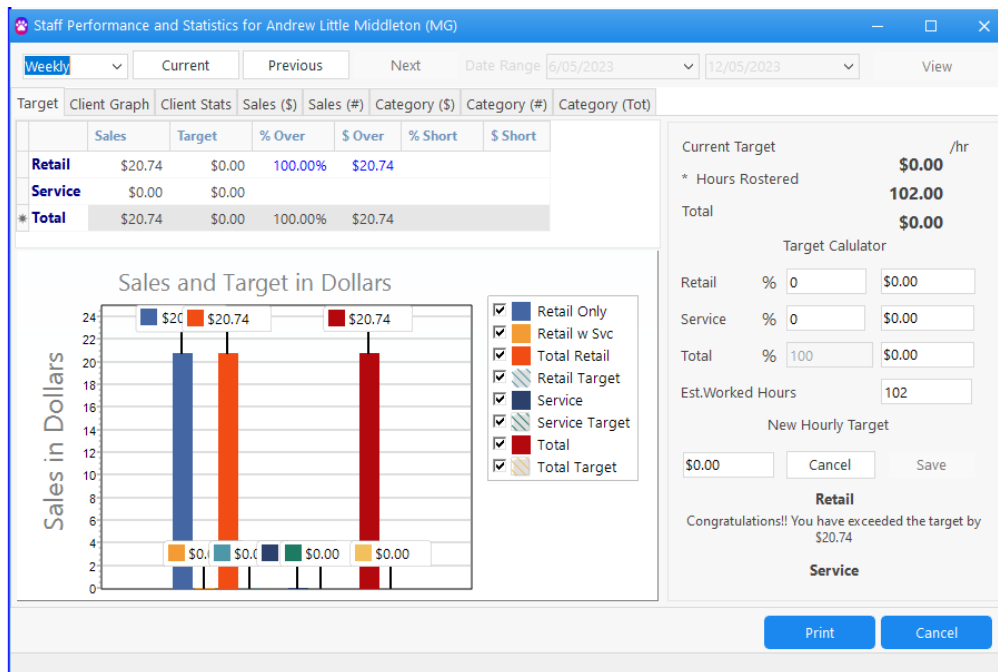


Stock Transfers		X	Transfer stock between Stores / Sites
Stock Takes		X	Generate stock-take sheets
Staff Edit		X	Maintain Staff Records
Staff Create		X	Create new staff records
Staff Inactivation		X	Inactivate Staff Records
Staff Target		X	Enable access to staff target in staff record
Send AdHoc SMS		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 View		X	View History
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 bookings
Hotel Delete		X	Delete hotel bookings
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 all 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 Users
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
Manage Recurring Payments		X	To Manage Recurring Payments
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
View Activity Logs		X	View activity logs

# 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 the ribbon and select **Set Target and Shop Statistics**.

Staff Target Configuration and Shop Statistics

Period: Weekly Date: 6/05/2023 From: 6/05/2023 To: 12/05/2023

Staff Target Clinic Total

Staff Name	Hourly Target Calculator			Other Targets	
	Saved Hourly Target	Hours	Total Target	Retail %	Next Target Change
Aliz AAZurcher (AA)	\$0.00	7	\$0.00	0%	
John Newbrook (AAM)	\$0.00	0	\$0.00	0%	
Co2-Abc Staff (ABC)	\$0.00	0	\$0.00	0%	
Richard Koens (AG)	\$0.00	0	\$0.00	0%	
Caroline Satchwell (AL)	\$0.00	0	\$0.00	0%	
Barry Parker (ALO)	\$0.00	0	\$0.00	0%	
Stephen Arnold (AM)	\$0.00	0	\$0.00	0%	
Stan Molloy (AP)	\$0.00	52.5	\$0.00	0%	
Leanne Jarvie (AT)	\$0.00	50	\$0.00	0%	
Staff 2 Branch 2 (B2B2)	\$0.00	0	\$0.00	0%	
Staff 1 Branch 2 (B2S1)	\$0.00	0	\$0.00	0%	
Alan Florence (BB)	\$0.00	12	\$0.00	0%	
Beryl Beetham (BB2)	\$0.00	0	\$0.00	0%	
Jane Partlow (BBA)	\$0.00	0	\$0.00	0%	
Jeremy Mc Cleland (BJ)	\$0.00	45	\$0.00	0%	

Print Save Cancel

# 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.

Title	Abbr	Status
		Active
Veterinarian	Dr	Active
Nurse		Active
Practise Manager		Active
Receptionist		Active
parent		Inactive

Buttons: Back, Previous, Next, Forward, Refresh, Add (+), Remove (-), Edit (Pencil), Exit

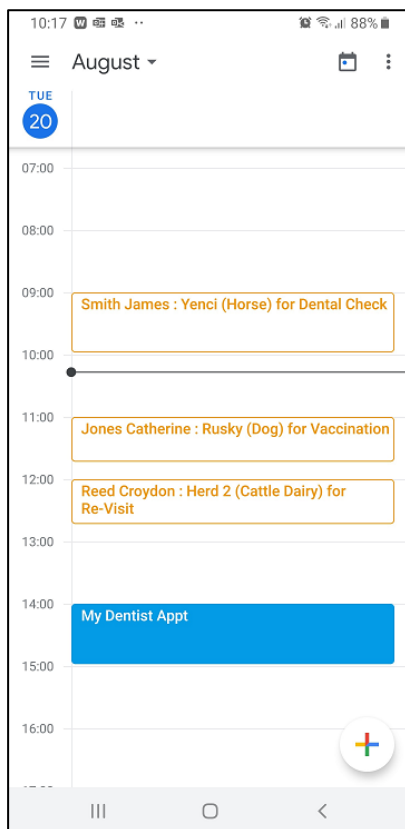
[MG] Middleton Andrew Little (Staff # 1/78 Cln #)

1 : General	2 : More	3 : Mark
Started	<input type="text"/>	Employ
Finished	<input type="text"/>	Wage C
Billing Grade	<input type="text"/>	Wage S
Access Lvl	E	IRD No
Position	<input type="text"/>	Tax Co
Department	parent	Rest
Category 1	Receptionist	Nam
Category 2	Practise Manager	Clas:
<input type="checkbox"/> Allow On Web	Nurse	Clas:
To Mobile	Veterinarian (Dr)	Clas:
Qualification	Yes	Clas:
Req No.		> Clas:

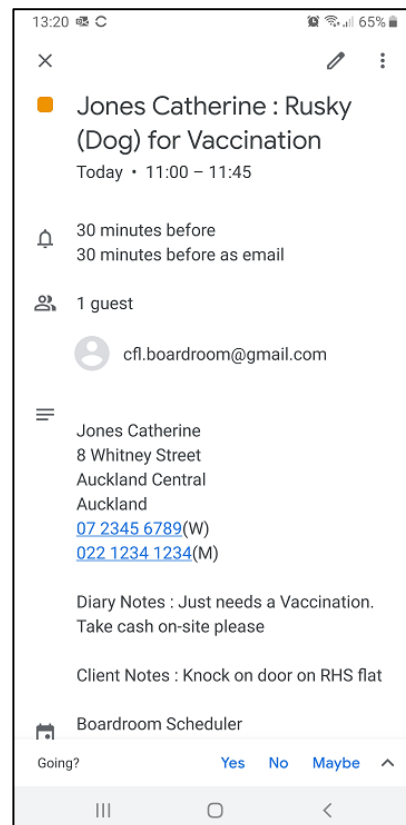
# STAFF APPOINTMENT UPLOAD TO GOOGLE PERSONAL CALENDAR

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 VetlinkPRO 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.

**Email Appointments To Staff**

☒ Send Automatically

For this to work

1. Set "Send Email to Staff" in Diary Profile
2. Set "Auto email appointments" for each staff, in Staff Roster, for each Diary

Resend if appointment is moved more than  mins.

Name	Type	Status	Number
Tkp Consults	Normal	Active	101

**General**

Num Apts / Time Slot: 2

Minimum Apt Time: 15 mins

Default Appointment Time: 20 mins (5-60)

Staff Order: Alphabetic

Room Is Required: No

Time Division Display: 15 Mins

Send SMS to Staff: Yes

Send Email to Staff: Yes

Billing to Mobile: Yes

Send to Smart Flow Sheet: Yes

Include in Checklink App: No

No Notification: No

**Email & SMS**

**Zoom Level Setup**

Num	Hrs	Staff
1	8	10
2	4	8
3	0	0
4	0	0
5	0	0

**1 : General**

Title / Gnd: Female

Last Name: Beetham

First Name: Beryl

Known As:

Co Name:

DOB:

Status: Active

Staff ID: 882

Work: 06

Home: 06

Fax: 06

Mobile: 0210666200

Phone 1: 06

Phone 2: 06

Phone 3: 06

Email: support@vetlinkpro.com

Email Work: support@vetlinkpro.com

Web:

**2 : More**

**3 : Marketing**

**4 : Financial**

**5 : Info**

**6 : History**

**7 : Doc Mgr**

**8 : Staff**

**9 : Delivery**

**10 : RunOff**

**11 : Postal**

Building:

St Num: 10

Street: Dufferin Street

Suburb:

City: Waipukurau

Post Code: 4200

Distance: km

Care of:

Address Notes:

**12 : Billing**

3 Mth + \$0.00

2 Mth \$0.00

1 Mth \$0.00

Current \$0.00

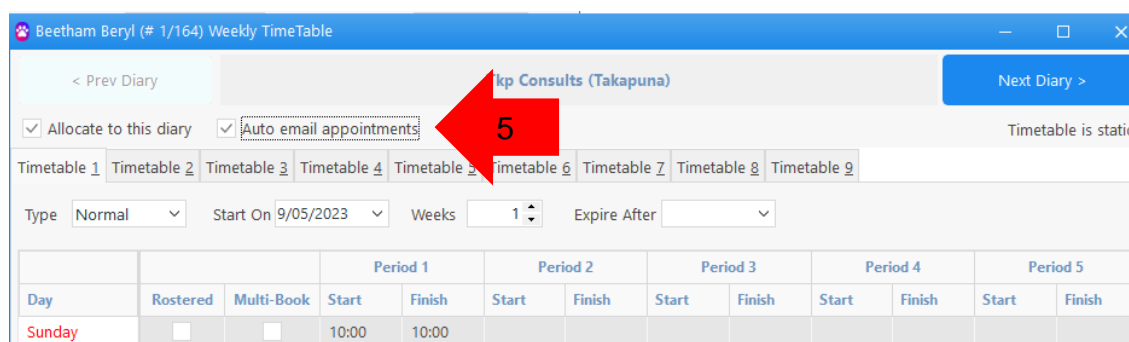
Total \$0.00

Open \$0.00

Batched \$0.00

Total \$0.00

Num	Name	Type	Breed	Colour
/36221	Ginga	Cat	DSH	Ginger



Beetham Beryl (# 1/164) Weekly TimeTable

< Prev Diary | Skip Consults (Takapuna) | Next Diary >

☒ Allocate to this diary ☒ Auto email appointments

Timetable 1 Timetable 2 Timetable 3 Timetable 4 Timetable 5 Timetable 6 Timetable 7 Timetable 8 Timetable 9

Type: Normal Start On: 9/05/2023 Weeks: 1 Expire After:

Day	Rostered	Multi-Book	Period 1		Period 2		Period 3		Period 4		Period 5	
			Start	Finish	Start	Finish	Start	Finish	Start	Finish	Start	Finish
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	10:00	10:00								

**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.

**BARRYS POINT VET CLINIC**  
21 Barrys Point Road | Takapuna | Auckland  
Phone: 09 489 2280 | Fax: 09 489 2290  
www.vetlinksqll.com

## VACCINATION CERTIFICATE

This certificate certifies that «AnimalName» was vaccinated at «Logo1»

Animal Name:	«AnimalName»
Date of Birth / Age:	«AnmDOB»
Animal Type:	«AnimalType»
Animal Breed:	«AnimalBreed»
Animal Colour:	«AnimalColour»
Owners Name:	«Firstname» «Lastname»
Owners Address:	«StreetNo» «Street» «City» «Zip»
Vaccines Administered (Drug):	«Vac_Drug_Done_List»
Next Vaccination:	«Vac_Due_List»

Protection after vaccination may take up to 2 weeks. Isolate «AnimalName» during this period. A booster vaccine will be necessary to maintain immunity. Vaccines are usually harmless, however, if «AnimalName» shows signs of illness after vaccination, please contact us immediately.

«Staff\_Signature»  
«StaffTitle» «StaffFirstName» «StaffLastName» «StaffQualification» «StaffRegNo»  
Date: «ToDay»

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www.vetlinksqll.com

## VACCINATION CERTIFICATE

This certificate certifies that Bella was vaccinated at Barrys Point Vet Clinic

Animal Name:	Bella
Date of Birth / Age:	7/06/2006
Animal Type:	Dog
Animal Breed:	Labrador
Animal Colour:	Chocolate
Owners Name:	Adam Smith
Owners Address:	14 Glomar Grove VIC 3850
Vaccines Administered (Drug):	
Next Vaccination:	07/Jul/2015 Feline Vaccination

Protection after vaccination may take up to 2 weeks. Isolate Bella during this period. A booster vaccine will be necessary to maintain immunity. Vaccines are usually harmless, however, if Bella shows signs of illness after vaccination, please contact us immediately.

*Joe Bloggs*

Dr. Joe Bloggs BVScN1234  
Date: 21/10/2015