

CLIENT MANAGEMENT

CONTENTS

OVERVIEW.....	3
Personal Tab	3
More Tab.....	6
Marketing Tab	8
Financial Tab.....	9
Info Tab.....	11
Account Tab.....	12
Sales Tab.....	12
Bonus Points Tab	13
Incentive Disc Tab	13
History Tab	15
8: Bills Tab	15
9: Transactions Tab.....	16
8: Quotes Tab.....	17
Doc Mgr Tab.....	18
Contacts Tab	19
SEARCH FUNCTION.....	20
How to Perform a Basic Client Search.....	20
Using Advanced Search options	21
Most Recently Used List.....	22
HOW TO ENTER A NEW CLIENT	24
HOW TO CHANGE CLIENT DETAILS	25
HOW TO CREATE A SYNDICATE CLIENT	26
STREET, SUBURB & CITY MANAGEMENT.....	27
Adding a New Street	27
Editing an Existing Street.....	28
Adding a New Suburb & City	28
Editing an Existing Suburb and City	29
Address Format When Printing	30
REFERRAL MANAGEMENT	31

How to Create Referral Types	31
How to Set how a Client was Referred.....	31
MAILING LIST MANAGEMENT.....	32
Adding a New Mailing List Group.....	32
CLIENT GROUPS AND FLAGS	33
Manual Client Group Flags.....	33
Setting up a New Manual Client Group Flag.....	33
Assigning a Manual Client Group Flags to Clients.....	33
Automatic (Sales) Client Groups	35
Setting up a New Sales Client Group Flag	36
SETTING UP CLIENT CATEGORIES.....	36
SETTING UP CLIENT PROFILES	37
ADDING CLIENT NOTES	37
CLIENT DETAILS COLLECTION ENFORCEMENT	38

OVERVIEW

The client module is primarily used to hold client details, preferences and other attributes. It is also a centralised reference point for purchases, reminders and history notes. The following chapter describes the functions of each of the client module tabs.

Personal Tab

The personal tab is where client personal details are maintained and where account information can be viewed.

Radar Breeding Ltd (Client # 1/20857) Aitcheson Rubbish

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

Title / Gnd: Mr. Male
 Last Name: Aitcheson
 First Name: Rubbish
 Known As:
 Co Name: Radar Breeding Ltd
 Date:
 Status: Active

Work: 06
 Home: 06
 Fax: 06
 Mobile: 02
 Phone 1: 06
 Phone 2: 06
 Phone 3: 06
 Email: nada20857@cfl.co.nz
 Web:

7 : Postal 8 : Delivery 9 : RunOff

Building:
 St Num: 44
 Street: Mangateitei Road
 Suburb: Bluff Hill
 City: Napier
 Post Code: 4110
 Distance: km
 Care of:
 Address Notes:


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

Future Bills: ...
 \$0.00
 Credit: ...
 \$0.00
 ...
 ...
 ...

	Num	Name	Type	Breed	Colour
	1/61220	Follow The Sun	Horse	T/Bre	Bay

By_Number AF3 : Exit

Date	Not Applicable
Status	The status field should be set to ' Active ' as long as the client still actively deals with the business. When this is set to ' Inactive ' you will no longer be able to see the client record in normal searches. You would normally set a client to ' Inactive ' in cases where the client has ceased dealing with your business.
Contact Numbers	<p>These are the contact numbers for the client. The numbers do not have to be in any particular format but it is advisable to enter them in such a way that they can easily be read, with the corresponding area codes. Provision is made for up to seven phone numbers; work, home, fax, cell phone plus phone 1, 2 ,3.</p> <p>NOTE: Phone 1, 2 and 3 are not used as mail merge variables and will not appear in any reports.</p>
Work	Client's work phone number.
Home	Client's home phone number.
Fax	Client's Facsimile number.
Mobile	Client's mobile number.
Email	This is the client's preferred e-mail address. This is displayed in a purple colour, which signifies that you can automatically send an e-mail just by double-clicking on the address.
Web	The client's web address. This can be used in a similar manner to the e-mail option. Double-clicking it activates your preferred web browser (e.g. internet explorer) and goes straight to the client's website.
Address Details	<p>This section is subdivided into three tabs allowing you to enter the postal, delivery and run-off address.</p> <p>Postal: This is the address for all posted mail for the client or company.</p> <p>Delivery: This is the address where all parcels or packages will be delivered for the client or company.</p> <p>NOTE: The delivery address is used on shipping labels when specified.</p> <p>Run Off: This is the address of the farm if it is different from the postal or delivery.</p>
St Num	Enter only the street number of location or, if the client uses post office boxes then enter the post office box details in the format "PO Box XXX".
Street	Refers to the street name. You can either type it in or select it from the drop-down list provided. This option is disabled when a PO box is used in the street number field.

Suburb	Refers to the suburb name. You can either type it in or select it from the drop-down list provided. Suburbs are linked to Cities so when you select the suburb it will automatically choose the City.
City	Refers to the city name. The city is automatically entered when the suburb is chosen.
Post Code	Refers to the Post code for that addresses area.
Distance	This is how far a client is located from the clinic. Enter the figure in kilometres. This piece of information is particularly useful when billing for a job that was performed at the client site. VetlinkPRO will automatically calculate how much the client would be charged for mileage based on the distance provided.
Care Of	The care of field refers to the postal location of the customer if the customer's postal address is the same as their business postal address or within a company department, for example, To: John Smith Care of Marketing Department
Address Note	This is where you can add any additional notes about the address.
Account Balance	<p>The account balance gives users a quick overview of the status of the client account. These figures are dynamically updated by bills made to the client and show balances for the current, 30, 60, and 90-day periods.</p> <p>To the right of the 'Total' field is the ellipsis button. Clicking this button will open the 'Account Reconciliation' screen view a more detailed view of the client account. You can switch between months using the 'Previous Month' and 'Next Month' buttons.</p> <p>The Account Balance also shows a total for unfinished (open) and batch bills. The ellipsis button next to these will show you the transactions that make up these totals</p>
Batch Bills	This is the total of batch bills that are not posted.
Future Bills	This is the total of future bills that are not yet fully updated.
Patients	This section displays a list of the patients that this client has on the system. In setup you can choose to view 'All' or just 'Active' patients. To view inactive patients, go to Options -> Setup -> Patient -> Options -> Show Inactive Patients on Client Screen .
Intelligent Notes 	The Red Pushpin notes button is used to create notes that are related to the client. These notes can be manipulated to pop up at predetermined stages or screens in VetlinkPRO. The notes can be used to remind a staff member to do something or provide them with more information. The notes can also be set up to print out on a client's histories, receipts, statements etc.

More Tab

The **'More'** tab contains further fields for recording client information and assigning clients to groups and categories with the system.

User Code	An abbreviation or short code used to identify the client. It is normally created by the system, but it can be modified to suit your preference.
Pref Staff	N/A
Batch Code	This option is used during statement printing. It is a code that is used to group certain clients together when printing statements. For example, you may want to send out a newsletter to all VIP clients with their statements. By marking VIP clients with a "VIP" batch code, all these statements will print out together – making it easier to slip a newsletter into the envelope for these clients.
Recall	This is an indicator that states whether the client would like to receive recall reminder prompts at billing. This is normally set to 'Yes' but can be set to 'No' if the client does not want to be issued with recall reminders.
Group	Indicates which Group the client belongs to. Set in 'Pick Lists Setup' .

Family	N/A
Category 1/2/3/4	The client categories group the clients for reporting purposes. A client can only belong to one group in each category.
Syndicate	A group of clients can be classed as a syndicate where they are liable for a certain pre-set percentage of the total bill.
Referral	The referral fields relate to how the client found out about your business. You can select from different referral types that are created by users. This information is particularly handy for allocating advertising budgets.
Referral	The existing client on the VetlinkPRO database that referred the new client to the business
Referral Type	This relates to how the client was referred to the business. For example, if they were referred to your business from a friend, newspaper, TV etc.
Referral Date	This relates to the date the referral was made which is updated automatically when the referral details are entered.
Belongs To	If you are running VetlinkPRO in multi-branch or company mode, this setting states which branch / company they belong to
To Mobile	Allows the Client records to be exported for use in the Mobile Billing App.
Web Access	The Web Access section is where the username and password are stored for the client's online booking login. It can be reset here, and an email sent to the client.
Privacy policy	The Privacy policy setting records whether a client has consented the clinic privacy policy. Once you tick the privacy policy you can then select whether they consented in person, over the phone or by email.

Marketing Tab

The Marketing Tab is useful for setting up any marketing information that is relevant to the client. Information in the Marketing tab is useful for customer relations, for example, to identify a client as a VIP.

The screenshot displays the 'Marketing' tab for a client named 'Aitcheson Rubbish' (Client # 1/20857). The interface includes several sections for configuring communication preferences:

- Send By Mail:** Checkboxes for Apt Confirm, Recall, HealthCare, Mailers, Newsletter, Promotion, Reminders, and Statement.
- Contact By Phone for:** Checkboxes for Apt Confirm, Recall, HealthCare, and Reminders.
- Send By Email:** Checkboxes for Apt Confirm, Recall, HealthCare, Mailers, Newsletter, Promotion, Reminders, and Statement.
- Send By SMS:** Checkboxes for Apt Confirm, Recall, Mailers, Promotion, Reminders, and Treatment.
- Mailing Lists:** Four columns (1, 2, 3, 4) showing various client groups like 'List1', 'List2', 'List3', 'List4', 'MY List', 'Animates Staff', 'Beef farming', 'Dairy farming', etc., with checkboxes for selection.

The bottom of the window features navigation buttons (Back, Forward, etc.) and a status bar with 'By_Number' and 'AF3 : Exit'.

Send By Mail

Click in the check boxes to identify the information the client would like to receive through the post.

Contact By Phone for

Click in the check boxes to identify the information for which the client would like telephone contact.

Send By Email

Click on the check boxes to identify the information the client would like to receive via email.

Send By SMS

Click on the check boxes to identify the information the client would like to receive via SMS.

Mailing List 1/2/3/4

This is used for sending mail outs to clients. You can use the mailing list to group common clients together. You can customise the name of each entry in the Mailing Lists to your preference. At the bottom of the column, is a list of the mailing lists that this client is subscribed to.

Financial Tab

The Financial tab displays the financial settings and discounts that relate to a particular client.

Radars Breeding Ltd (Client # 1/20857) Aitcheson Rubbish

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

Commercial: No
Acc. Fee: Acc
Interest: Int
Exempt GST: No
Exempt @Tax2: No
Disc on Svc: Normal
Disc on Retail: Normal
Disc on Mat: Normal
Disc on Drugs: Normal
Def Pmnt: 1 : Cash
Stop Mailers: No
Stop Cheque: No
Stop Charge: No
Stop Statement: No
Reason Why:

Personalised Discount Schedule ☐ Show Expired Entries

Product	Start On	Finish On	Staff Id	Discount	Incentive Disc
> Advance Cat Adult Chicken	15/03/2023	9/06/2023	AAM	10	0

Primary

Product Restrictions ☒ Show All [View Details](#)

Product	Start On	Finish On	Status	Quantity Allowed	Quantity Sold	Quantity Left
> Baytril 150mg - C3	21/03/2023	21/06/2023	A	20	0	20
Bivatop Inj	21/03/2023	21/04/2023	A	1	0	1

By_Number

Menu AF3 : Exit

Commercial

Indicates whether the client is a commercial client or not.

Acc. Fee

Allows you to select the account fees that will be used on a client's account. These fees can be manually edited by the user in 'Setup'.

Interest

Allows you to specify the type of interest that the client will incur on their account. Again, interest settings can be manually edited by the user in 'Setup'.

Exempt GST

Indicates whether the client is to be exempted from GST or not. You may not be able to edit this setting, as it is dependent on settings selected in 'Setup'.

Exempt @Tax2

This indicates whether the client is to be exempted from Tax2 or not. You may not be able to edit this setting, as it is dependent on settings selected in 'Setup'.

Disc on Svc	The group the client is assigned to for receiving discounts on services
Disc on Retail	The group the client is assigned to for receiving discounts on retail
Disc on Mat	The group the client is assigned to for receiving discounts on materials
Disc on Drugs	The group the client is assigned to for receiving discounts on drugs
Def Pmnt	You can choose a default payment method that will be automatically selected when finishing a bill for this client.
Stop Mailers	Normally set to 'No' but set this to 'Yes' if you want a client to stop being sent mailers from the 'Bulk Mailers' module.
Stop Cheque	Normally set to 'No' but set it to 'Yes' if you want to stop a client from using cheques as a method of payment. A prompt will appear to warn you when you try to select 'Cheque' and it will ask you to choose another payment method.
Stop Charge	Normally set to 'No' but change to 'Yes' if you want to stop a client from charging a bill to their account.
Stop Statement	Normally set to 'No' but set it to 'Yes' if you will not be sending statements to this client.
Reason Why	Enter a reason why you have selected 'Yes' to any of the stoppages above. This is for your own reference.
Personalised Discount Schedule	In the personalised discount schedule, you are able to give one-off discounts to a client on a number of services and retail products which are only active for a specified date range. For example, you could give one client a 20% discount on "Dog Car Harness" which is valid until the end of the month.
Product Restrictions	The product restrictions section in the client record is where you can view all of the prescriptions that have been made for this client.

Info Tab

The info tab shows you accounting information for sales, bonus points and incentive discounts for a client. This tab shows both up to date as well as historical information. You can view a client's account status, sales analysis and bonus points as well as incentive discounts just by clicking on the appropriate button.

Radars Breeding Ltd (Client # 1/20857) Aitcheson Rubbish

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

Account Sales Bonus Points Incentive Disc

Account Information

Month	Statement Date	Current	1 Mth	2 Mth	3 Mth +	Total Owed	Total Payments	Credit Available
> Nov 2021	8/08/2022	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Oct 2021	22/07/2022	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sep 2021	18/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Aug 2021	3/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jul 2021	3/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jun 2021	24/09/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May 2021	14/09/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Apr 2021	30/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mar 2021	2/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Feb 2021	2/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jan 2021	29/07/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dec 2020	2/06/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Nov 2020	2/06/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Oct 2020	24/05/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sep 2020	13/05/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Aug 2020	22/04/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

First Visit: 1/11/2011 Last Paid: 174.30

Last Visit: 27/01/2012 on Date: 27/01/2012

Last Staff: Bill Num.: 1/667972

Visits: 2

Since: DD Acc: Chq 1 Chq 2 Chq 3

Bank: Ac Num: Ac Nam:

Visit Freq:

By Number Menu AF3 : Exit

Account Tab

The Account tab displays the amounts owed to your business by a client. The amounts are aged into monthly figures, so you can easily determine how much a client is in arrears.

Account		Sales				Bonus Points		Incentive Disc	
Account Information									
Month	Statement Date	Current	1 Mth	2 Mth	3 Mth +	Total Owed	Total Payments	Credit Available	
> Nov 2021	8/08/2022	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Oct 2021	22/07/2022	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sep 2021	18/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Aug 2021	3/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jul 2021	3/11/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jun 2021	24/09/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May 2021	14/09/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Apr 2021	30/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mar 2021	2/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Feb 2021	2/08/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jan 2021	29/07/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dec 2020	2/06/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Nov 2020	2/06/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Oct 2020	24/05/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sep 2020	13/05/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Aug 2020	22/04/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Sales Tab

This displays the sales history for clients for each month since the first sale. The figures are then broken down into sales for services and other sales (i.e. Sales of products that are not services). To complement these figures actual profits made on service sales, other sales and totals for both are displayed.

Account		Sales		Bonus Points		Incentive Disc	
Sales Information (Excluding Tax)							
	Statement Month	Sales Total	Sales (Services)	Profit Total	Profit (Services)	Profit Other	Sales Other
>	Nov 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Oct 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Sep 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Aug 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Jul 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Jun 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	May 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Apr 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Mar 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Feb 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Jan 2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Dec 2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Nov 2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Oct 2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Sep 2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Aug 2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Bonus Points Tab

This shows the number of bonus points that a client has accrued through having services performed or by purchasing products. It details each transaction where bonus points were used or gained.

Account		Sales		Bonus Points		Incentive Disc		
Bonus Points								
Bill		Date		Gained	Used	Available	Expiry	Referral
> 1/815416		29/03/2023		483	0	483	29/07/2023	
Total Available				483				

Incentive Disc Tab

This displays the incentive discounts that a client received as a result of paying on time. You can specify a “pay-by” date and set up a discount in **‘Setup’** that becomes effective if a client pays their account by that date.

Account	Sales	Bonus Points	Incentive Disc
Incentive Discount Statistics			
Statement Month	ID Offered	ID Taken	ID Available
> Nov 2021	\$0.00	\$0.00	\$0.00
Oct 2021	\$0.00	\$0.00	\$0.00
Sep 2021	\$0.00	\$0.00	\$0.00
Aug 2021	\$0.00	\$0.00	\$0.00
Jul 2021	\$0.00	\$0.00	\$0.00
Jun 2021	\$0.00	\$0.00	\$0.00
May 2021	\$0.00	\$0.00	\$0.00
Apr 2021	\$0.00	\$0.00	\$0.00
Mar 2021	\$0.00	\$0.00	\$0.00
Feb 2021	\$0.00	\$0.00	\$0.00
Jan 2021	\$0.00	\$0.00	\$0.00
Dec 2020	\$0.00	\$0.00	\$0.00
Nov 2020	\$0.00	\$0.00	\$0.00
Oct 2020	\$0.00	\$0.00	\$0.00
Sep 2020	\$0.00	\$0.00	\$0.00
Aug 2020	\$0.00	\$0.00	\$0.00

The bottom of the Info tab displays information about the client visits to the business and the last payment on their account. It also stores any cheque and direct debit details.

First Visit	30/03/2004	Last Paid	\$836.53	DD Acc	Chq 1	Chq 2	Chq 3
Last Visit	14/02/2013	on Date	19/12/2012	Bank	kiwibank		
Last Staff		Bill Num.	1/771340	Branch	Wellington		
# Visits	367			Ac Number	123456-02		
Since	30/03/2004			Ac Name	angus		
Visit Freq.							

First Visit	This is the date of a client's very first visit or the very first time a client dealt with the business.
Last Visit	The last time a client visited the clinic.
Last Staff	The last staff member that dealt with the client.
# Visits	The total number of visits a client has made.
Since	This displays the start date for the number of visits recorded.
Visit Freq	N/A
Last Paid	Displays the amount that was last paid on a client's account.
On Date	The date on which the amount displayed above was paid.
Bill Num.	The invoice number that details the last payment.
Direct Debit and Cheque Details	This section displays a client's direct debit and cheque details. Each client can have up to three different cheque accounts and one direct debit account stored on the system. To enter new cheque details, click on the ellipsis button. This will open a new window prompting you to enter the details.

Edit Bank Details

Bank

kiwibank

Branch

Wellington

Account No

123456

suffix

02

Account Name

angus

You are banking with BNZ bank

The account number accepts maximum of 7 digits, the suffix accepts maximum of 3 digits.

If you enter less than the maximum, ZERO will be added automatically.

Save

Cancel

History Tab

The history tab is split into three more tabs that displays purchase history for a client.

8: Bills Tab

The '8: Bill' tab is split into two sections. The top section displays a summary of all bills while the bottom section lists all the items that are on the bill selected in the top section. Double-clicking on a bill in the top section will open up the bill for viewing.

Radars Breeding Ltd (Client # 1/20857) Aitcheson Rubbish

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

8 : Bills 9 : Transactions 0 : Quotes

Date Range 21/03/2020 21/03/2023 Bill Type Search

* Number	Type	State	Bill Date	Bill Total (Excl.)	GST	Bill Total (Incl.)	Total	Bill Time	Description	Inventory Date	Inventory State	Err
> # 1/815408	RCT	Invoiced	21/03/2023	\$53.41	\$8.01	\$61.42	\$61.42	13:37		21/03/2023	Closed	
# 1/815405	INV	ClnUpdtd	21/03/2023	\$82.18	\$12.32	\$94.50	\$94.50	12:11		21/03/2023	StkUpdtd	

...

* Quantity	Type	Subject	Description	Price (Excl.)	GST	Price (Incl.)	Store	Number	Class	Discount (Excl.)	Discount (Incl.)
> 0	\		For Follow The Sun	0	0	0		1		0	0
0	/		@Radars Breeding Ltd	0	0	0		2		0	0

By_Number

Menu AF3 : Exit

9: Transactions Tab

The **'9: Transactions'** tab allows you to search for specific transactions using the filters provided. You are able to search for transactions in a certain date range, by a particular staff member, for transactions that used a certain product, category of products or class of products.

Addis Ted (Client # 1/1025)

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

8 : Bills 9 : Transactions Q : Quotes

Date From 29/03/2020 Date To 29/03/2023 Staff Category-1 Category-2 Prd Class Patient Product Search

* Date	Qty	Item	Sell (Excl.)	GST	Sell (Incl.)	Staff	Category-1	Category-2	Class	Patient
> 29/03/2023	1	Aboistop Citronella-Refill	37.8	\$5.67	43.47	LOC	C/AHARDWAR	Default	R	bob

Menu AF3 : Exit

8: Quotes Tab

The '8: Quotes' tab is split into two sections. The top section displays a summary of all quotes and estimates while the bottom section lists all the items that are on the quote or estimate selected in the top section. Double-clicking on a quote or estimate in the top section will open up the quote or estimate for viewing.

Radars Breeding Ltd (Client # 1/20857) Aitcheson Rubbish

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

8 : Bills 9 : Transactions 0 : Quotes

Date Range 21/03/2020 21/03/2023 Search

* Number	Type	Date	Bill Total (Excl.)	GST	Total	Till	Created On
> 1/815404	QOT	21/03/2023	64.67	9.7	\$74.37	Tkp	21/03/2023
1/815406	QOT	21/03/2023	2.14	0....	\$2.46	Tkp	21/03/2023
1/815407	EST	21/03/2023	35.37	5....	\$40.68	Tkp	21/03/2023

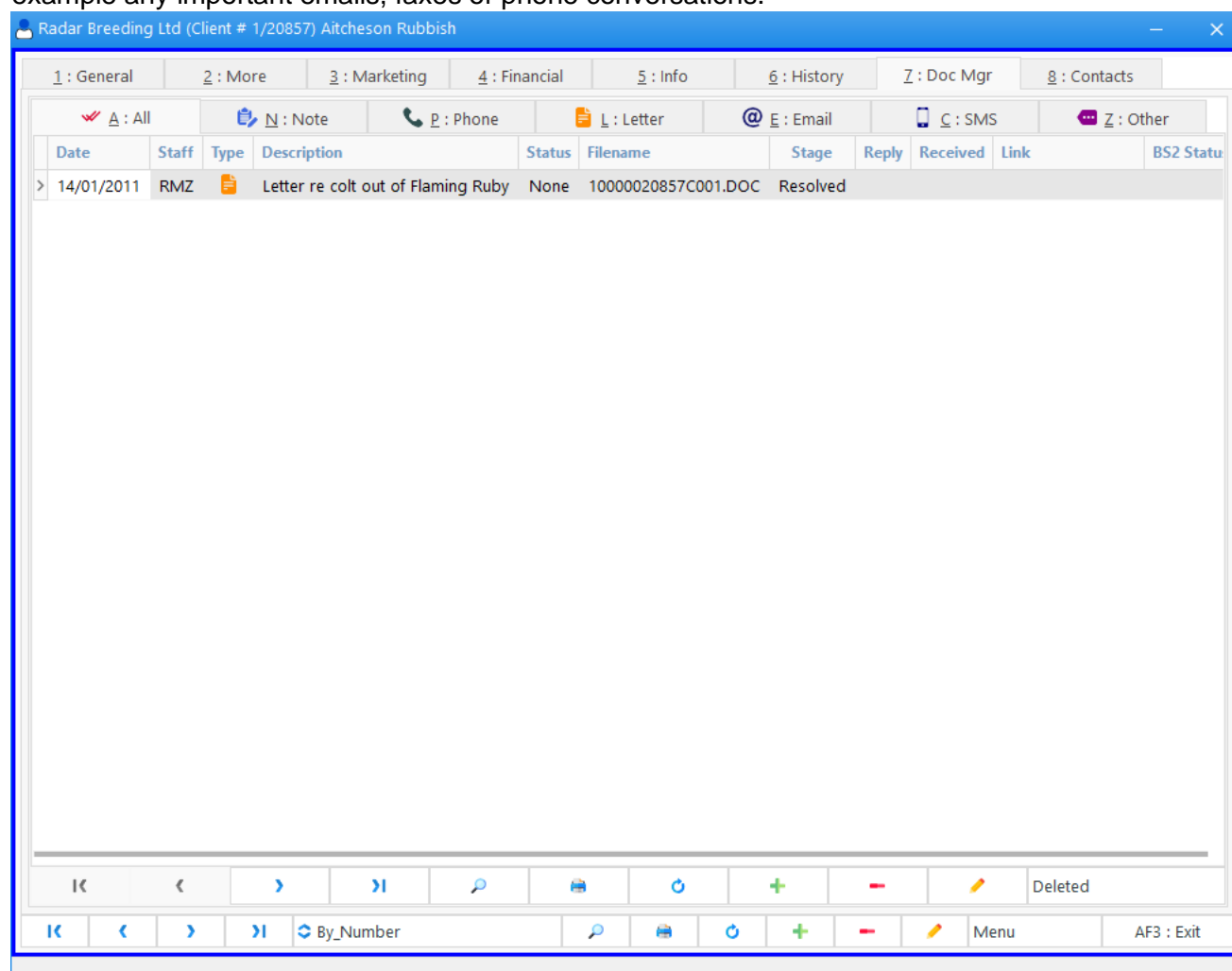
...

* Qty	Type	Description	Price (Excl.)	GST	Price (Incl.)	Staff	Subject	Store	Number	Class	Discount (Excl.)	Discount (Incl.)	ID Offered	Bonus Point
No data to display														

By_Number Menu AF3 : Exit

Doc Mgr Tab

The document manager is used for recording any communication that you have with your client - for example any important emails, faxes or phone conversations.



The document manager is split into seven different sections or document types. In each tab you can record a different piece of communication the clinic had with the client. All communication is saved so you can look back to see what contact you have had with a client. The communication types are listed below.

- A: All
- N: Note
- P: Phone
- L: Letter
- E: Email
- C: SMS
- Z: Other

Contacts Tab

The 'Contacts' tab on the client record is where you can record additional contacts. This is especially useful for farms or studs where there are multiple contacts in the business. Each contact needs to be assigned a position which can be assigned in **'Pick List Setup'**.

Elizabeth (Client # 1/21491)

1 : General

2 : More

3 : Marketing

4 : Financial

5 : Info

6 : History

7 : Doc Mgr

8 : Contacts

☐ Hide Inactive Contacts

* First Name	Last Name	Id	Position	Phone	Email	Status	Con
> Belinda	Frost		Parent	123456789		Active	

⏪

⏴

⏵

⏩

🔍

🔄

+

-

✏️

Change Employer

Send Email

⏪

⏴

⏵

⏩

🔄 By_Number

🔍

🔍

🔄

+

-

✏️

Menu

AF3 : Exit

SEARCH FUNCTION

The client search function is used in many areas of the program, for example when making appointments, making bills or simply looking up client details. Regardless of what you are doing, when searching for a client the same search options and dialogue boxes are used.

How to Perform a Basic Client Search

1. Click on the **'Client'** button.
2. This will display the **'Client Search Window'**.
3. Enter the first few letters of the last name, first name or company name of the client you are searching for.
4. Click **'Search'** to begin the search.
5. The search results are now displayed. To navigate through the list, use the keyboard cursor keys (the up and down arrows) or use the scroll bar at the right-hand side of the window.
6. To make a selection either:
 - a. Double-click on a line in the results window to open the record.
 - b. Navigate using keyboard or mouse to the line you require, and press **'Accept'**.
 - c. Navigate using keyboard or mouse to the line you require, and press **'Browse'**. Using **'Browse'** will open the record but also leave the search results open so to easily select another record.

Client Search												
Search Text test												
F3	Accept	Cancel	New	Advanced	Clin-Pat Adv	Retry	Browse					
* Num	Title	First Name	Last Name	Company	User Code	Status	Home	Work	Mobile	Manual Group	Auto Group	Address
> # 1/24766	Mrs.	test	11		11	Active			021 567890...	None		21 Barrys Takapau Hotel
# 1/1	Mrs.	Test	Client		CLIENT	Active	06		0210666200			Tiroki Street, Weber, Dannevir...
# 2/43623	Mrs.	Tessa	Kimura		TESTBAL	Active		06	0210666200	Orange		104 Unit Sth Hampton, Raurek...
# 1/24453		Richard	Old test		TESTER	Active	06 8433563			Blue Fla...		10 King Road
# 1/24455	Mr.	Meredith	Old Tester		TESTER	Active	068773137			Orange		5 Nash Street, Havelock North...
# 1/24753	Syndicate	Syndicate Test 02			SYNDICATET	Active				None		
# 1/24710	Client 02	Test			TEST	Active				None		
# 1/24708	Client 022	Test			TESTGENERA	Active				None		
# 1/24711	Client 11	Test			TEST	Active				None		
# 1/23282	Mangu	Test Abbott			ZTEST	Active			0210666200	Purple FL...		1518 Nottingley Road, Rd 2 ...
# 2/1242	Monica	Test Abbott		Hall Racing Kennels	ABBOTT	Active	06 3682126	06 3679900	0210666200			122 Plymouth Road, Levin 5510
# 1/15760	Eamon	Test Abdul - Jabbar			ABDULJABBA	Active						C/- Puketapu P O Lynhurst Ro...
# 1/5597	Alma	Test Abraham			ZTEST	Active	06 8765565	06 8766576				607 Lake Road, Mahora, Hasti...
# 1/18235	Blair	Test Abraham			ZTEST	Active	068799147	06	0210666200			9 Moerangi Station, Flaxmere...
# 1/3805	Samantha	Test Ackley			ZTEST	Active	06 8588074					24 Hill Road, Waipukurau 4200

Using Advanced Search options

If you cannot find the client you need, or if there are too many results to search through, you can narrow your search by using the advanced search function.

1. Click on the **'Client'** button.
2. This will display the **'Client Search Window'**.
3. Click on either the **'Advanced'** or the **'Cln-Pat Adv'** button.
4. The **'Advanced Search Form'** will now open.
5. This form provides more options for you to search by, such as the client number, user code, status and phone number.
6. Select the client and choose **'Accept'** to open the client record.

Advanced Search Fields Overview

Number	The client number as assigned by VetlinkPRO.
Last Name	The client's last name.
First Name	The clients first name.
Company	The company name.
User Code	Alternative user defined search code.
Status	Defines whether client is active or inactive.
Phone	Searches all phones numbers. E.g. Home, work, fax and cellular.
Email Address	Searches by email address.
St No / Box	Find clients with a particular street or PO box number.
Street	Find all clients having the selected street in the address.
Suburb	Find all clients having the selected suburb in the address.
City	Find all clients having the selected city in the address.
Amt Owing	Searches for clients with an amount owing on their last statement between the specified values.
Notes	Allows users to search for keywords or phrases in the intelligent notes attached to clients' records.
Patient Name	Finds clients that have patients with the specified name
Patient Type	Finds clients that have patients that are a specific patient type
Patient Breed	Finds clients that have patients that are a specific patient breed
Patient Colour	Finds clients that have patients that are a specific colour
Anm Status	Finds clients that have patients that are a specific status

Deceased	Finds clients that have patients that are deceased
DOB (mm/yy)	Finds clients that have patients that have a specific birth date
Search By	Finds the client record that is either the owner, person who the bills are charged to, or the physical location of the patient.
Contains	The ' Contains ' fields provide a word within a word search on selected fields. For example, if ' Contains ' is checked and you do a first name search for Anne, the system will find 'Anne', ' Joanne ' and ' Joe and Anne '. If ' Contains ' was unchecked it would only find ' Anne '.
Belongs To	Find clients belonging to a particular branch.
Syndicates Only	Find only syndicate clients.



TIP: You may set up your preferred method of search under **Options | Setup | Client | 1: Options tab | Search Dialog** then select '**Simple**' or '**Advanced**' from the drop-down list.

Client Search

1 Number 2 Last Name 3 First Name 4 Company 5 User Code 6 Status

7 Phone 8 Email Address 9 Street No/ Box 10 Street 11 Suburb 12 City

13 Belongs To 14 Syndicates Only 15 Group Man 16 Group Sales 17 Amt owing 18 Ngtes

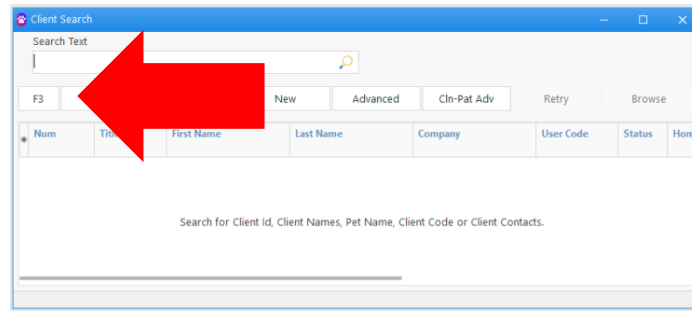
19 Sample Clinic 20 ALL* 21 ALL* 22 Any word

F3 Accept Cancel New Simple Cln-Pat Adv Retry Browse

Num	Title	First Name	Last Name	Company	User Code	Status	Home	Work	Mobile	Manual Group	Auto Group	Address
# 1/24710	Client 02	Test	TEST		TEST	Active				None		
# 1/24708	Client 022	Test	TEST		TEST	Active				None		
# 1/24711	Client 11	Test	TEST		TEST	Active				None		
# 1/23282	Mangu	Test Abbott	TEST		TEST	Active			0210666200	Purple FL		1518 Nottingham Road, Rd 2 ...
# 2/1242	Monica	Test Abbott	ABBOTT	Hall Racing Kennels	ABBOTT	Active	06 3682126	06 3679900	0210666200			122 Plymouth Road, Levin 5510
# 1/15760	Eamon	Test Abdul - Jabbar	ABDULJABBA		ABDULJABBA	Active						C/- Puketapu P O Lynhurst Ro...
# 1/5597	Alma	Test Abraham	ZTEST		ZTEST	Active	06 8765565	06 8766576				607 Lake Road, Mahora, Hasti...
# 1/18255	Blair	Test Abraham	ZTEST		ZTEST	Active	06 8765565	06 8766576	0210666200			607 Lake Road, Mahora, Hasti...

Most Recently Used List

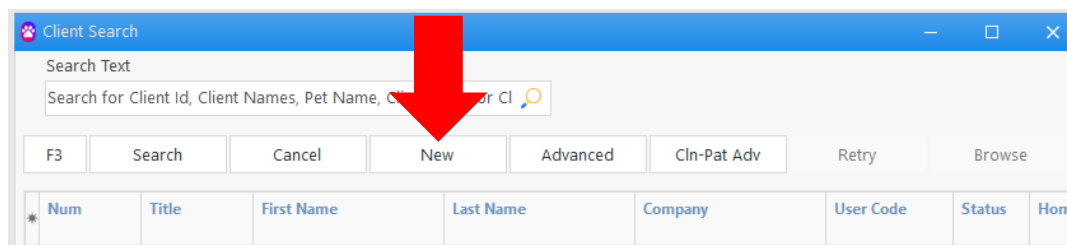
The F3 button will show the most recently searched list. For example if you are looking at a client record and accidentally close it, then can't remember who you were looking at, just click the star icon to find the most recently used records.



The screenshot shows a window titled "Client Search". At the top, there is a "Search Text" label followed by a text input field and a magnifying glass icon. Below this, there are several buttons: "F3", "New", "Advanced", "Cln-Pat Adv", "Retry", and "Browse". A large red arrow points from the right towards the "Search Text" input field. Below the buttons is a table with the following headers: "Num", "Title", "First Name", "Last Name", "Company", "User Code", "Status", and "Home". The table body is empty. Below the table, there is a text prompt: "Search for Client Id, Client Names, Pet Name, Client Code or Client Contacts." followed by a horizontal line.

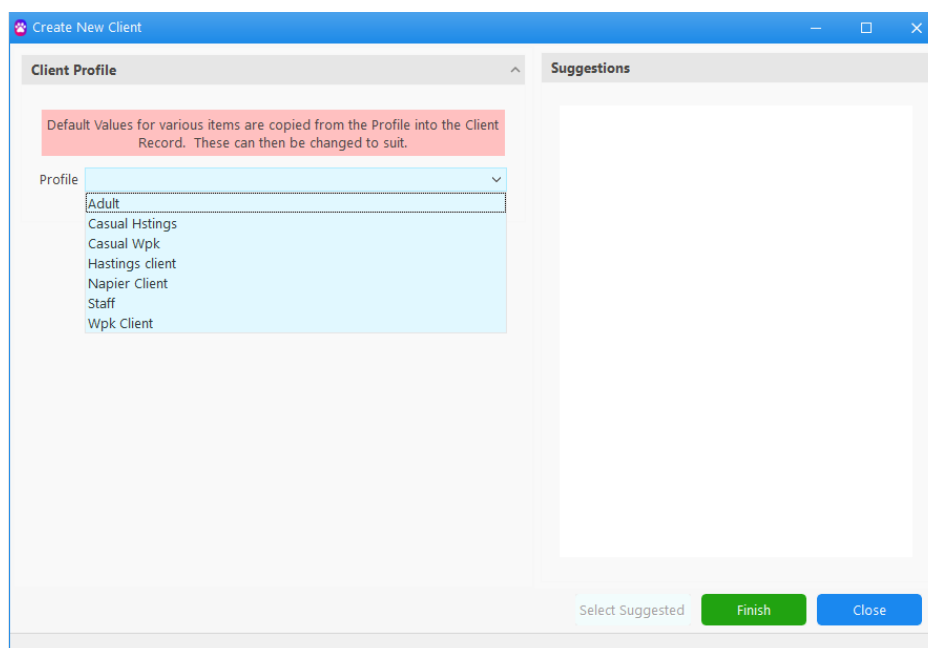
HOW TO ENTER A NEW CLIENT

1. Click on the **'Client'** button.
2. The **'Client Search'** window will open.
3. Click on the **'New'** button to enter a new client.



The 'Client Search' window has a search bar with the text 'Search for Client Id, Client Names, Pet Name, C...' and a magnifying glass icon. Below the search bar are buttons: F3, Search, Cancel, New, Advanced, Cln-Pat Adv, Retry, and Browse. At the bottom is a table with columns: Num, Title, First Name, Last Name, Company, User Code, Status, and Hom.

4. The **'Client Profile'** window will open. Select the client profile you wish to use.



The 'Create New Client' window has a 'Client Profile' section with a dropdown menu. The dropdown is open, showing a list of profiles: Adult, Casual Hstings, Casual Wpk, Hastings client, Napier Client, Staff, and Wpk Client. A message box says: 'Default Values for various items are copied from the Profile into the Client Record. These can then be changed to suit.' At the bottom are buttons: Select Suggested, Finish, and Close.



TIP: Client Profiles enter some default information when creating new clients. Each profile can enter different information which is configured by users. This makes client entry faster and also helps stop mistakes being made.

5. A **'New Client Record'** will open. Enter the new client details onto the form.
6. Click on the tick button to save.

HOW TO CHANGE CLIENT DETAILS

1. Click on the **'Client'** button.
2. Search for the client whose details you wish to edit.
3. Open the client record.
4. Edit the details you wish to change or add.
5. If you are unable to edit the details, click on the **'Edit'** button on the bottom of the client window.
6. Once the client details have been modified save the changes by clicking on the tick in the bottom right-hand corner.

THUNDEREICH KENNELS (Client # 2/45445) AAZurcheraa Ali

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

Title / Gnd: Mrs. Female
 Last Name: AAZurcheraa
 First Name: Ali
 Known As:
 Co Name: THUNDEREICH KENNELS
 Date:
 Status: Active

Work: 06
 Home: 042329671
 Fax: 06
 Mobile: 0210666200
 Phone 1: 06
 Phone 2: 06
 Phone 3: 06
 Email:
 Web:

Z : Postal g : Delivery q : RunOff

Building:
 St Num: 281
 Street: Mangatahi Road
 Suburb: Tawa
 City: Wellington
 Post Code: 5028
 Distance: km
 Care of:
 Address Notes:

3 Mth + \$20.00 Future Bills: ...
 2 Mth \$0.00 \$0.00
 1 Mth \$0.00 Credit:
 Current \$0.00 \$0.00

Total \$20.00
 Open \$180.28
 Batched \$0.00
 Total \$200.28

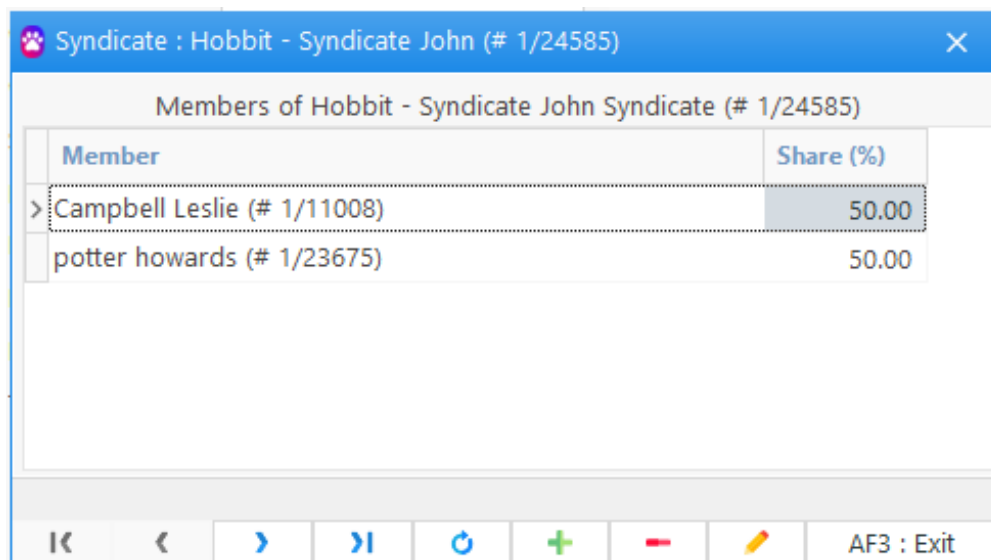
	Num	Name	Type	Breed	Colour
>	2/16723	Chill	Dog	German Shepherd	
>	1/39683	Holly -Hells Angel	Dog	German Shepherd	Black & Gold
>	2/16721	Karlos	Dog	German Shepherd	

IK < > >I By_Number 🔍 🖨️ 🔄 + - ✏️ Menu AF3 : Exit

HOW TO CREATE A SYNDICATE CLIENT

A group of clients can be classed as a syndicate where they are liable for a certain pre-set percentage of the total bill. Syndicate bills can only be charged to account, they cannot be finished with any other payment method. To create a syndicate client, follow the steps below.

1. Create the client records for each member of the syndicate as normal.
2. Create the patient that the syndicate owns as normal.
3. Create a new client record for the syndicate.
4. Click on the **'More'** tab.
5. Change the **'Syndicate'** field to **'Yes'**.



7. Click on the **'+'** button to add a new member.
8. Search for the client you wish to add to the syndicate.
9. Assign their share of the syndicate.
10. Repeat for the rest of the members.
11. Click the tick at the bottom of the window to save changes.

STREET, SUBURB & CITY MANAGEMENT

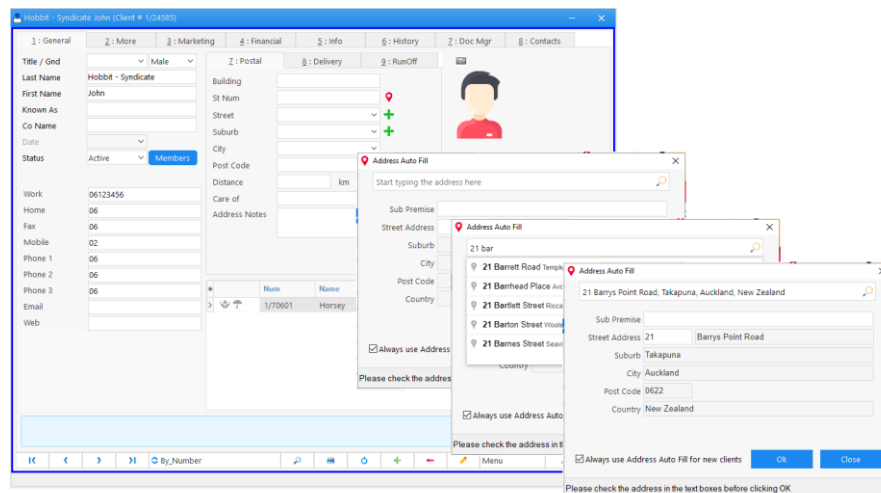
Google Address Engine

Client addresses can be entered quickly & accurately using the integrated Google Address Engine.

1. Just click on the icon next to the St Num and the Address Auto Fill window will open.
2. Start typing the address and it will find matching addresses for the text already typed.
3. Once you have found the correct address just select it and click **OK** and the address fields will be automatically populated inside VetlinkPRO.

This method of entry will ensure the right post codes are selected every time and also avoids duplicates of the same street and suburb with different spellings.

Tip: If you would like this to be the preferred entry method for all new clients make sure the option **Always use Address Auto Fill for New Clients** is ticked on the autofill window. This way as soon as you click the St Num field for new clients the Autofill window will automatically open.



Adding a New Street

Street names in VetlinkPRO are stored in a database. As a new street is added it gets added to the existing list. To add a new street to the list, follow the steps below.

1. Create a new client or open an existing client record.
2. Start typing the new street name into the street field.
3. A prompt will appear. **'Street name not found add 'new street' to the database'**.
4. Select **'Yes'** to add a new street.
5. The **'Adding a New Street'** window will open.
6. Check the street name is correct and click **'Save'** to add the new street.

Editing an Existing Street

If there is a street in the system that has been spelt incorrectly or is no longer active, you can edit it through **'Pick List Setup'**.



NOTE: Every client that is currently linked to this street will change to the new name as well

1. Go to the **'Options'** then **'Pick Lists Setup'**.
2. Select **'Client'** and double click **'Street'**.
3. The Street Pick List will open. Double click on the street you wish to edit.
4. The Street Details window will open.
5. Edit the name of the street.
6. If the Street is not currently linked to any client records you will be able to mark it as inactive as well.



NOTE: If you wish to mark it as inactive and clients are still linked to that street you will need to find those clients and change their street address first.

7. Click **'Save'** to save the street.

Adding a New Suburb & City

Suburbs and Cities in VetlinkPRO are stored in a database and linked together. As a new suburb you are also prompted for a city, and they are added to the existing list. To add a new suburb and city to the list follow the steps below.

1. Create a new client or open an existing client record.
2. Start typing the new suburb name into the suburb field.
3. A prompt will appear. **'Suburb name not found add 'new suburb' to the database'**.
4. Select **'Yes'** to add a new suburb and city.
5. The **'Adding New Record'** window will open.
6. Check the suburb name is correct and the city that it is in.
7. Click **'Save'** to add the new suburb and city combination.

Editing an Existing Suburb and City

If there is a suburb and city in the system that has been spelt incorrectly or is no longer active, you can edit it through **'Pick List Setup'**.



NOTE: Every client that is currently linked to this suburb and city will change to the new name as well.

1. Go to the **'Options'** then **'Pick Lists Setup'**.
2. Select **'Client'** and double click **'Suburb & City'**.
3. The Street Pick List will open. Double click on the street you wish to edit.
4. The Suburb and City window will open.
5. Edit the name of the suburb and / or city.
6. If the Suburb and City is not currently linked to any client records you will be able to mark it as inactive as well.



NOTE: If you wish to mark it as inactive and clients are still linked to that suburb and city you will need to find those clients and change their address first

7. Click **'Save'** to save the suburb and city.

Address Format When Printing

VetlinkPRO allows you to choose from a number of address formats that will be automatically used when printing address labels, statements, tax invoices or tax receipts. To change these settings, go to [Options | Setup | Client | Address Formats](#).

Address Format 0: (C/O line irrelevant)

In this format the address on the statement will be displayed in one of two ways depending on the presence of the “*Company Name*” field. If the company name is present, it will be displayed; otherwise the “*Client Name*” will be used for the address.

Company Name Present	Company Name Blank
Company Name Address	Client Name Address

Address Format 1: (C/O line irrelevant)

In this format the address on the statement will be displayed in one of three ways depending on the presence of the “*Company Name*” and the “*Client Name*” fields. If both these fields are present, then both will be displayed. If the “*Company Name*” field is blank, then the “*Client Name*” would be displayed and vice-versa.

Company Name and Client Name Present	Company Name Blank	Client Name Blank
Company Name Attn: Client Name Address	Client Name Address	Company Name Address

Address Format 2: (C/O line relevant)

- Case 1: C/O field present (NOT Blank)

The address format on the statement will be displayed in one of two ways depending on the presence of the “*Client Name*” field. If the client name is present, it will be displayed and if the client name is blank, then the “*Company Name*” will be used instead.

Client Name Present	Client Name Blank
Client Name C/O Address	Company Name C/O Address

- Case 2: C/O field blank

In a situation where address Format 2 is used, and the C/o field is **blank**, then the address on the statement will be displayed in one of three ways depending on the presence of the “*Client Name*” and “*Company Name*” fields. If both the client and company name fields are present, then both will be displayed on the statement. If the client name field is blank, then the company name will be displayed and vice-versa.

Client Name Present	Client Name Blank	Company Name Blank
Company Name Attn Client Name Address	Company Name Address	Client Name Address

REFERRAL MANAGEMENT

How to Create Referral Types

The referral list, by default, is populated with two types of referrals. They are '**None**' and '**REWARD CLIENT**'. Follow the steps below to enter your own referral types.

1. Go to the '**Options**' menu then click on '**Setup**'.
1. When setup has loaded click on the '**Client**' button and go to the '**5: Referrals**' tab.
2. On the right-hand side of the page is a list of referral names. You can now add to this list or edit the types already entered.
3. If you have selected '**Reward Client**'; the existing client who referred the new client can receive bonus points on the new client first visit. The existing client can receive a flat rate, or they can receive points depending on how much the new client spends.

The screenshot shows the 'Client Setup' window with the 'Referrals (Master)' tab selected. The window has a menu bar with '1: Options', '2: More Options', '4: Lists', '6: Referrals', and '7: Address Formats'. Below the menu bar, there is a section titled 'Referrals (Master)'. Under this section, there is a sub-section 'Reward Client with Bonus Points'. This sub-section contains two input fields: 'On First Visit' with a value of '500' and 'Per Dollar spent' with a value of '10'. To the right of these input fields is a table with two columns: 'Num' and 'Desc'. The table contains the following rows:

Num	Desc
0	None
1	REWARD CLIENT
2	Walk-in
3	Friend
4	Yellow Pages
5	Magazine Advert
6	Newspaper Advert
7	Radio/TV
8	SPARE
9	SPARE

How to Set how a Client was Referred

1. Open a client record and click on the '**More**' tab.
2. Click on the ellipsis button next to the referral field to add in referral details.
3. The referral window will open. Select how the client was referred to your business from the '**Referral Type**' Pick List.
4. If the referral was from another client, you can select the referring client in the '**Referred By**' field.
5. Click '**OK**' to save and exit.

MAILING LIST MANAGEMENT

Adding a New Mailing List Group

1. Go to **'Options'** and then **'Setup'**.
2. Once setup has loaded up click on the client button.
3. Select the **'4: Lists'** tab.
4. Enter your Mailing List by typing in one of the available fields.

Client Setup

1 : Options 2: More Options **4 : Lists** 6 : Referrals 7 : Address Formats

Mailing Lists (Master)

List 1 Descriptions		List 2 Descriptions		List 3 Descriptions		List 4 Descriptions	
0	List1	0	List2	0	Beekeeping	0	List4
1	L1-1	1	L2-1	1	Arable cropping	1	L4-1
2	L1-2	2	L2-2	2	Beef farming	2	L4-2
3	L1-3	3	L3-3	3	Dairy farming	3	L4-3
4	MY List	4	MY2 List	4	Deer farming	4	
5		5	Test Group	5	Dogs	5	
6		6		6	Dairy dry stock	6	Item 0
7		7		7	Emu farming	7	
8		8		8	Fish farming	8	
9		9		9	Cut flowers	9	
A	All	A	Animates Staff	A	Forestry	A	Item 0
B		B	test	B	Fruit growing	B	
C		C	Bonus_Points	C	Goat farming	C	
D		D	BP_Scheme	D	Grazing others stock	D	
E		E		E	Horse farming	E	Item 0
F		F		F	Lifestyle block	F	

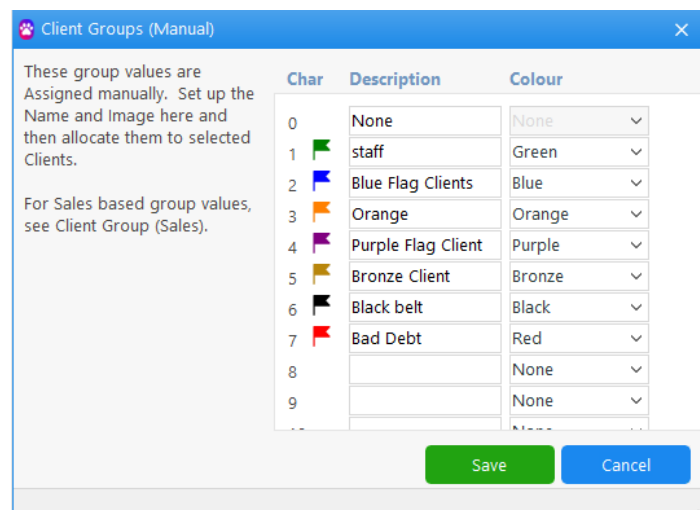
CLIENT GROUPS AND FLAGS

VetlinkPRO allows users to assign clients to groups which are identified by coloured flags or coins on diary appointments, client search windows, the billing screen, as well as the client record.

There are two types of groups. The Manual Client Groups will be in the shape of a flag with varying colours. These flags are assigned individually by the user on the client record. The Automatic Client Group will be in the shape of a coin with varying colours. These coins are assigned automatically by VetlinkPRO based on criteria set by the user for all clients.

Manual Client Group Flags

You can assign flags of different colours to client groups. These flags will appear on diary appointments, client search windows, on the billing screen, as well as the client record. This allows you to quickly determine what group the client belongs to. For example, you could have green flags for breeders, silver flags for staff members and blue flags for bonus points members. The flag will also appear when performing client searches making it easy to tell which “Joe Bloggs” is the breeder. Another example of using the flags may be to identify locality of clients such as “North”, “South”, “East” or “West”. The flags also appear on the appointments making it easy to schedule vet farm calls.



Setting up a New Manual Client Group Flag

1. Go to **'Options'** and then select **'Picklist Setup'**.
2. Click on **'Client'** and then **'Group (Manual)'**.
3. The **'Client Groups (Manual)'** window will open.
4. To add a new group, enter a new group name in one of the **'Name'** fields that is blank field and select a colour from the **'Colour'** menu.

Assigning a Manual Client Group Flags to Clients

1. Search for and open a client record.

2. Click on the **'More'** tab.
3. Select a new group from the **'Group'** menu list.



TIP: You can also set the group to be assigned to client profiles under **Options | Pick list Setup | Client | Profiles**. This way new clients will automatically have the correct group selected when they are created.

McLean Partnership (Client # 1/4295) Abel S R

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

User Code: ABEL

Pref Staff: [dropdown]

Batch Code: [dropdown]

Recall: No [dropdown]

Group: Purple Flag Client [dropdown]

Family: 0

Category 1: companionwp [dropdown]

Category 2: wpk l/a [dropdown]

Category 3: Default [dropdown]

Category 4: Default [dropdown]

Syndicate: No [dropdown] View Members

Referral: [dropdown]

Referral Type: None

Referral Date: [dropdown]

Belongs To: MAIN [dropdown]

To Mobile: [dropdown]

For Web Access

Username: nada4295@cfl.co.nz

Password: ****

Reset: None [dropdown] Send Email

Privacy Policy

☐ Client has consented to clinic privacy policy*

[dropdown]

[Green Checkmark] [Red X]

Automatic (Sales) Client Groups

Clients can be automatically “graded” and applied to special client groups based on their sales figures. For example, you could create a client group called “Silver Client” that would contain all clients that have spent between \$2000 and \$5000 in a predefined period. Using these groups allows you to quickly know who your biggest spenders are. You can also choose to calculate only from profit and/or for services only if you wish to exclude retail sales.

Selecting the number of visits can solve the problem of large single purchases. A client might spend over \$2000 on a single expensive surgery but that doesn’t necessarily mean they should belong in the Silver Client group as they may not intend to come back regularly at all. Setting the visits to 5 means they need to have come in at least 5 times in the chosen period and also spent an amount that is in one of the ranges specified.

☒ **Feature Enabled**

These Group values are assigned automatically, based on Sales. Set up names, image and dollar values here.

☐ **Use Profit**
Assignment is by Sales by default. You can select to do it by Profit.

☐ **Use Services Only**
Assignment is by Total Sales by default. You can select to do it by Services Only.

Select number of visits the Sales are to be looked at. Set to 0 to ignore visits.

Select number of months the Sales are to be looked at. Set to 0 to ignore months.

Char	Description	Colour	Sales From	Sales To
0	None	None	\$0.00	\$0.00
1	Level 1	Grey	\$0.00	\$0.00
2	Level 2	Bronze	\$0.00	\$0.00
3	Level 3	Silver	\$0.00	\$0.00
4	Level 4	Gold	\$0.00	\$0.00
5		None	\$0.00	\$0.00
6		None	\$0.00	\$0.00
7		None	\$0.00	\$0.00
8		None	\$0.00	\$0.00
9		None	\$0.00	\$0.00
10		None	\$0.00	\$0.00
11		None	\$0.00	\$0.00
12		None	\$0.00	\$0.00
13		None	\$0.00	\$0.00
14		None	\$0.00	\$0.00
15		None	\$0.00	\$0.00
16		None	\$0.00	\$0.00

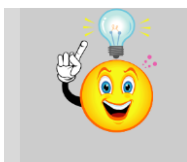
Item 0 is the default

Save

Cancel

Setting up a New Sales Client Group Flag

1. Go to **'Options'** and then select **'Picklist Setup'**.
2. Click on **'Client'** and then **'Group (Sales)'**.
3. The **'Client Groups (Sales)'** window will open.
4. To add a new group, enter a new group name in one of the **'Description'** fields that is blank field and select a colour from the **'Colour'** menu.
5. Select the criteria that you would like clients to be assigned to this group by.
6. VetlinkPRO will now check your client's spending overnight and updates them to the correct groups.



NOTE: Ensure that your VetlinkPRO Background Processor is left running overnight otherwise this will be performed when it is first started in the morning.

NOTE: You can force recalculation by clicking on the client's group icon on their client record, this will take any sales from today into effect.

SETTING UP CLIENT CATEGORIES

Categories group clients, products, suppliers or patients together for reporting purposes. Common categories for clients could include beef, dairy or sheep. You can then generate a report for a particular category to see their sales figures or profitability. See below for instructions on creating a new category.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, patient, product or supplier menu depending on what type of category you are setting up.
3. Double-click on category 1 or 2. If you are creating a product category you have an extra three categories to choose from.
4. If you are creating a new category click on the plus button at the bottom of the form. (If you are editing a category name just click on the name with the mouse and type in the new name.)
5. A blank line will be added at the bottom of the grid. Type in the name of the category and click on the red plus button to save.
6. When creating a new client, patient, product or supplier record or when editing an existing record, you should now be able to assign that record to a category.

SETTING UP CLIENT PROFILES

When a new client, product or patient is added to your database, a profile is requested. Examples include Adult, Member, etc. The profile acts like a template and is there so that users in your business do not have to make decisions on several client configurations when setting up new client, product or patient records. These settings include what mailing list they will be automatically subscribed to, the report category that they will be assigned to, the discount levels that they will be given or the batch group they will go to for statements. You can create new client profiles with pre-set criteria and train your staff to select the correct ones when adding new clients. This 'standardisation' within your organisation will benefit the clinic as data entry will be faster and more accurate as several options will not have to be selected each time a new record is added to the database.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, patient, product or menu depending on what type of profile you are setting up.
3. Double-click on profile. This will open the client profile form.
4. To edit an existing profile, double-click on the profile name. To create a new profile, click on the plus button at the bottom of the screen.
5. The client, patient or product profile form will open. Select the options you wish to use in the profile. Depending on the profile selected several different options will be available.
6. Once you have set the fields for the profile click on the **'Accept'** button to save and exit.

ADDING CLIENT NOTES

The notes system is used to display pop-up or printed notes at various user defined stages in VetlinkPRO. For example, you can automate the system to display a note when a bill is made for a particular client. These notes may be prompts to advise staff of important information they need to know about a client while billing or making an appointment. Notes can be added for patients, clients, products, staff members and suppliers. The process for adding these reminders however is the same throughout the program.

CLIENT DETAILS COLLECTION ENFORCEMENT

VetlinkPRO includes client detail collection abilities, including the ability to 'Insist On' and 'Persist On' the entry of selected client details. These options will do wonders for your client database as things that are often missed like email and referral will now be collected for marketing purposes.

'**Insist On**' means that the information will be required before the client can even be created, use this for the most critical information. Most will want to use this for Phone and possibly Email to ensure that the client can be contacted.

'**Persist On**' means that users will be prompted to update missing information at appropriate times, for example: when creating an appointment. You can also choose '**Never**' so that VetlinkPRO won't ask again.

To set this up and view the options, go to [Options | Setup | Client | More Options](#).

The screenshot shows the 'Client Setup' window with the 'Client Entry Validation (Master)' tab selected. The 'Check Incomplete Client Details' section on the left has the following options checked: 'At Making Appointment', 'At Bill Payment', and 'On Arrival / Admit'. The 'Client Entry Validation (Master)' section on the right defines minimum details required for client entry (Insist On) and minimum details required to mark a client record to be fully entered (Persist On).

* Field Name	Insist On	Persist On
> Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EMail	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Referral	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Title	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, a 'Confirm' dialog box is displayed with the following text:

The following client details are missing
EMail
Address

Would you like to update them now ?

Buttons: Yes, No, Never