



Academy SOLUTIONS VET

Module 3 - Catalog

Module 3 – Catalog

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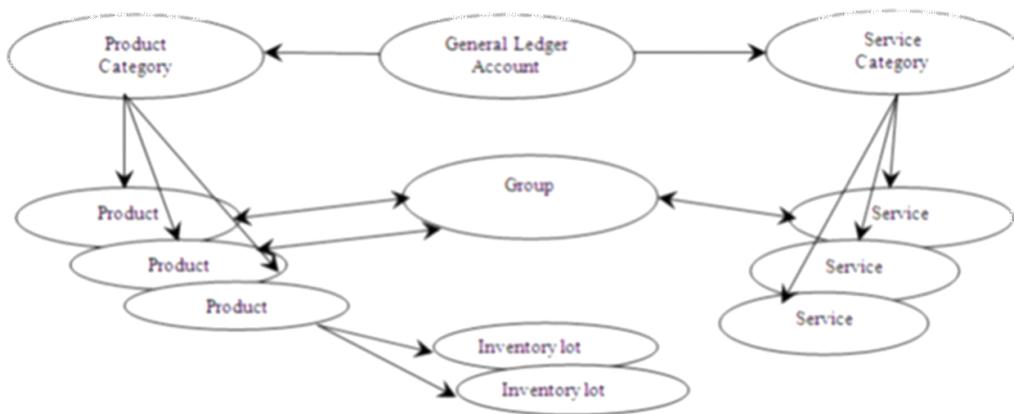
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**** IMPORTANT NOTICE ****

It is possible that some graphics and descriptions presented in our online training modules differ from your software version.

The Solutions Vet Academy regularly updates its modules; however, this software is in continuous development.

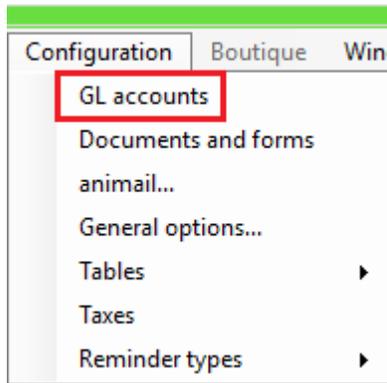
The catalog is the foundation of the software. The following diagram provides an overall view of the relationships of the different components of the catalog. The most important tables are the **Products**, the **Services** and the **Groups**. The purpose of this document is to define the windows used to create and maintain the information contained in the catalog.



1. General Ledger Accounts

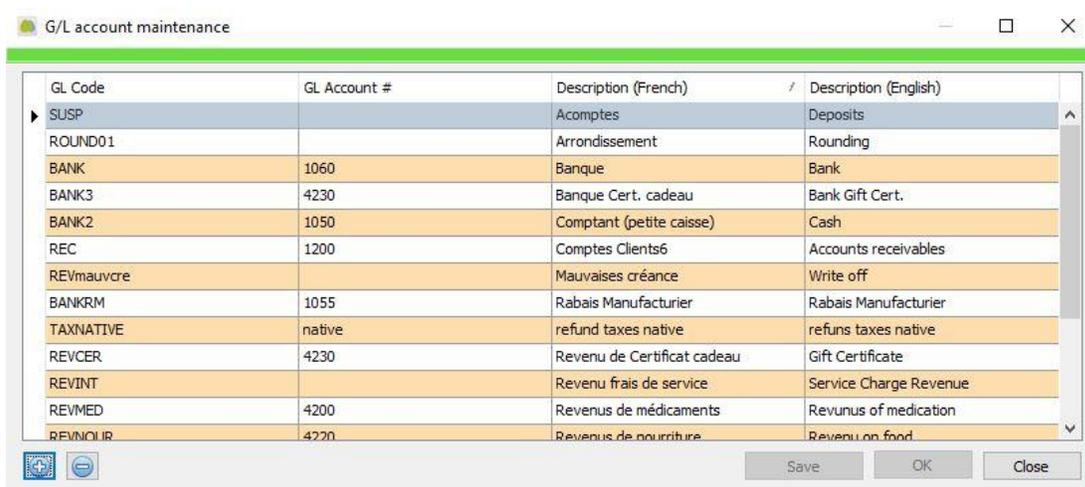
To access your General Ledger Accounts, click on:

Configuration > GL Accounts



The General Ledger (GL) account is the link between the product categories, the service categories and the charter of accounts of the clinic. The GL account is used to track all financial transactions and assign them to the proper accounts.

The software offers a predefined set of GL accounts, which can be expanded to better suit your clinic.



Click Add  to add a new GL transaction code or select one from the drop-down menu to make changes.

When modifying this area, please consider the following:

- Certain GL Transaction Code names cannot be changed, such as Bank, Taxes, Receivables, Deposits, etc. However, you can modify these with your GL Account # and your description
- You can add more GL Codes, but only in the Revenue and Bank categories. New GL Transaction codes must adhere to the following format:
 - **Name must begin** with either **REV_____** for revenue codes or **BANK_____** for payment type codes
 - For example, you might add **BANKVISA** or **BANKCASH** if you want to input individual payment modes into your accounting software
 - For example, you might add **REVOFFIC** or **REVFOOD** if you want to input revenues based on individual revenue categories into your accounting software
- Enter the Charter of Accounts number of your accounting software into the GL Account field as shown above
- When Adding or Modifying a GL Transaction code, the description you enter will be used by the Accounting Transaction reports, as well as in the Product & Service Revenue Categories (Parts 2.1 and 3.1) where you link revenue categories to the appropriate GL transaction code
- This description is also displayed when tying payment types to a GL transaction code (from **Configuration... Tables... Payment Mode...**)
- Since category descriptions may be the same for both Services and Products (such as Vaccinations, Injections, etc.) you might consider using S- and P- at the beginning of these descriptions to make the revenue reports more meaningful
- The names of the GL transaction codes (i.e. BANKVISA or REVFOOD, etc.) are used only internally by the system
- For any further questions regarding your GL codes, please talk to your accountant.

2. Products

2.1 Maintenance of Product Revenue Categories

2.1.1 Description

The product category is used to group products with similar characteristics. The category is used by many statistical reports and is also very useful when generating orders. The category is the link between the product and the GL account to which the sale will be attributed.

To access your Product Category, click on: **Catalog > Product Revenue Categories...**

2.1.2 Nomenclature

The nomenclature used in the Product Category window.

GL account	Description (French)	Description (English)
REVENU ON PRODUCTS	Produits	Produits
Revenus of medication	Biologique	Biological
Revenu on products	Formulaire	Form
Revenu on food	Gastro-intestinal	Gastro-intestinal
Revenu on products	Instrument	Instrument
Revenu on products	Matériel	Equipment
Write off	Mauvaises créances	Write off
Revenus of medication	Médicament	Drug
Revenu on food	Nourriture	Food
Revenu on food	Nourriture Hill's	Hill's food
Revenu on food	Nourriture Purina	Food Purina
Revenu on products	Nourriture Royal canin	food royal canin
Revenu on products	Produits	Product

- To add a new product category, click on , choose the appropriate GL Account using the drop-down menu and enter the name of the category.
- To edit an existing category, select there and make the changes. You can change its name or change the GL Code to which it is attached
- You can't delete a category if it has been used by the software
- You can create as many product category as needed to support your needs.

2.2 Products Configuration

2.2.1 Description

The product table contains all of the products the clinic needs to manage. Normally these are the products sold by the clinic. The software can also be used to manage other products that the clinic would like to keep in inventory or to be used by the ordering system (internal usage).

To access your Products, click on: «Catalog» < «Products»

2.2.2 Nomenclature

The nomenclature used in the Product window.

The screenshot displays the 'Product Maintenance' window. On the left, the 'Product explorer' shows a list of products with columns for description, category, and quantity. The product 'Advantage II for Dog - ...' is selected. The main area is divided into 'Product description' and 'Invoice description' sections, both containing fields for French and English names. Below these are fields for 'Revenues category', 'UPC', 'Classification', 'DIN', 'Manufacturer', and 'Planogram'. A 'Note' field is also present. At the bottom, there are fields for 'Unit cost', 'Flat charge', 'Markup', 'Fixed price', 'Round to', and 'Sale price'. A 'Prescription required' section includes checkboxes for 'Prescription required', 'Exclude prescription fee', 'Controlled substance', and 'Track inventory by lot'. The bottom of the window features buttons for 'Inventory', 'Usage', 'Print UPC', 'Next', 'Save', and 'Close'.

Product description	Cate...	Qty
Advantage II for Dog - ...	10026...	3
Advantage II for Dog - ...	10026...	3
Advantage II for Dog - ...	10026...	3
Advantage II for Mediu...	10026...	3
Advantage II for Mediu...	10026...	2,49
Advantage II Large Cat...	10026...	5
Advantage II Large Cat...	10026...	4
Advantage II Small Cat ...	10026...	4
Advantage II Small Cat ...	10026...	4
Advantage II Small dog ...	10026...	3
Advantage II XLarge Dog	10026...	3
Advantage Multi 10 chie...	Anti-P...	-5
Advantage Multi 100 chi...	Anti-P...	-4
Advantage Multi 18 cha...	Anti-P...	-1
Advantage Multi 55 chie...	Anti-P...	0

Red section:

This section is used to made search in your catalog product

Product explorer **Incomplete products**

Include invalid products

Description: 

Revenue category: <N/A> 

Classification: <N/A>

Planogram: <N/A>

Supplier: <N/A>

Stock: All

Supplier code:

Search results: 3650

Product description	Cate...	...	Qty
Advantage II for Dog - ...	10026...	...	3
Advantage II for Dog - ...	10026...	...	3
Advantage II for Dog - ...	10026...	...	3
Advantage II for Mediu...	10026...	...	2,49
Advantage II Large Cat...	10026...	...	5
Advantage II Large Cat...	10026...	...	4
Advantage II Small Cat ...	10026...	...	4
Advantage II Small Cat ...	10026...	...	4
Advantage II Small dog ...	10026...	...	3
Advantage II XLarge Dog	10026...	...	3
Advantage Multi 10 chie...	Anti-P...	...	-5
Advantage Multi 100 chi...	Anti-P...	...	-4
Advantage Multi 18 cha...	Anti-P...	...	-1
Advantage Multi 55 chie...	Anti-P...	...	0

Add Delete

Include invalid products: Also display products with an invalid status. Before creating a new product, it is better to verify if it does not exist in invalid form

Description: Enter one or more characters of the product name. For example: Searching for “Chl” will give you all products with “chl” inside the description

Revenue category: Choose a category from the drop-down menu. You will display all products of a specific category if you enter no characters in the description field

Classification: Used for Boutique only. See module 22 Boutique

Planogram: Used for Boutique only. See module 22 Boutique

Supplier: Searching by default supplier name for this product

Stock: Refine your search with or without an inventory

Supplier code: Searching by supplier code/reference number

Incomplete products: List the product that needs more information. New products added to the catalog by the “Confirm” function of your orders are in this tab

Add: Allows you to add new product

Delete: Allows you to delete a product if it has not been used. If it has been used, you will have to invalidate it (see in the green section)

Green section:

Product description		Invoice description	
French:	Advantage II chien Grand 11 - 25 kg pqt / 4 NEW	Advantage II chien Grand 11 - 25 kg pqt / 4 NEW	
English:	Advantage II for Dog - Large pqt / 4	Advantage II for Dog - Large pqt / 4	
Revenues category:	10026 AM Soins 6p72	UPC:	056500092502  <input type="checkbox"/> Invalid
Classification:	Care	DIN:	<input type="checkbox"/> Group use only
Manufacturer:	<N/A>	Logs:	<N/A> <input type="checkbox"/> Show on recommendations
Planogram:	10026 C/F Care products 72 x...	<input type="checkbox"/> Prescription required <input type="checkbox"/> Exclude prescription fee <input type="checkbox"/> Controlled substance <input type="checkbox"/> Track inventory by lot	
Unit cost:	36,57 \$	Flat charge:	0,00 \$
Markup:	1,0000	Fixed price:	<input checked="" type="checkbox"/>
Round to:	No rounding	Sale price:	69,99 \$
		Note:	<div style="border: 1px solid gray; height: 40px;"></div>

- Product description: Internal description of the product used by the search mechanisms. You can add information for the clinic such as the size of the bottle.
- Invoice description: Description of the product visible on the client's invoice.
- Revenues category: Identifies the product category.
- Classification: Used for Boutique only. See module 22 Boutique.
- Manufacturer: Used to indicate the product's manufacturer. To add manufacturer in your drop-down menu, you must create a new company client and check "Manufacturer" box.
- Planogram: Used by Boutique only. See module 22 Boutique.
- UPC: Manufacturer's Universal Product Code. It can be scanned, entered manually or automatically generated using 
- DIN: Enter the Drug Identification Number (DIN)
- Logs: Register if the product must be included in a log.
- Invalid: Invalidates a product in the catalog. This is the way to remove a product from the list if it has already been used.
- Group use only: Product can only be sold within a group. More details in point 4.
- Show on recommendations: View the product sold to an animal in the "Animal Summary" under "Products (1 year)"
- Prescription required: Indicates that the product must be sold by prescription and that the product will not be available to the "client sale" and "counter sale" functions. Conversely, if a product does not

- have the “prescription required” status, it will not be available in the “Prescription” window. The prescription is automatically included in the prescription log (History < Prescriptions) For more details see module 5; Medical File.
- Exclude prescription fee: Do not apply the prescription fee for this product. For more details, see module 5 Medical File.
 - Controlled substance: Indicates that all inventory transactions (sale, delivery, correction, etc.) for this product will automatically be included in the controlled substance log. You can access this log by **“Report” < “Logs” < “Controlled substances”**.
 - Track inventory by lot: When enabled, user must indicate the lot from which the product is being removed, at the time of sale.
 - Unit cost: Cost of the product at the smallest unit.
 - Mark-up: Multiplication factor that can be either manually entered to calculate a sale price or calculated based on the sale price divided by the unit cost.
 - Sale price: Price is entered manually or calculated based on the unit cost multiplied by the mark-up.
 - Flat charge: Additional fees added to the selling price. These fees may represent a combined fee for handling, labelling, packaging, etc. (mainly for a prescribed product but can apply to any products).
 - Fixed price: The price to be used instead of the sale price.
 - Round to: Automatically rounds the price according to one of the three options chosen when you change your unit cost:
 - No rounding
 - Nearest 9 cents
 - Round up to 9 cents
 - Notes: Allows you to write certain notes about the product. (Example: Equivalent product, number of kcal/cup for food, dosage for a medicine, etc.)

Blue section:

- “Inventory” button: Gives you access to the product inventory functions. (See in point 5).
- “Usage” button: Display the product usage (See on point 5)
- “Print UPC”: Prints a UPC label with product description, sale price and barcode.



“Order points” tab:

- Activate orders: Indicates that the product will be available for the “order” function.
- Order when at: Desired minimum stock, when your stock reaches this number, the product will be included in the next order.
- Order up to: The quantity to reach for this product.

“Suppliers” tab:

Order points	Suppliers	Vaccines	Label configuration	Applicable taxes
By default	Supplier	Product number	Qty./Format	
<input checked="" type="checkbox"/>	CDMV	117206	1	
<input type="checkbox"/>	Solutions Vet	201007	1	
* <input type="checkbox"/>				

- By default: Identifies the supplier to be used by default
- Supplier: Identifies the supplier. If the supplier does not exist in the list, a new supplier must be created by creating a new person as a company and identify it as a supplier (see module 1). The product will be ordered from your supplier by default.
- Product number: Contains the supplier’s code for this product
- Qty./Format: The quantity of the product contained in the purchase format of the product. (Example: food cans are purchased in cases of 24; capsules are purchased in formats of 100, 250, 500, 1000)

“Vaccines” tab:

Order points	Suppliers	Vaccines	Label configuration	Applicable taxes
--------------	-----------	----------	---------------------	------------------

Available

- Bordetella
- Calici Virus
- Chlamydia
- Corona
- DHPP Lepto
- DHPP Lepto Lyme
- DHPP Lepto Lyme Bord Rage
- DHPP Rage
- Distemper
- Hepatitis

▶

▶

◀

◀

Selected

- DHPP
- Leptospirosis

- Available: List of all available disease maintained via **“Configuration” < “Tables” < “Vaccine”**
- Selected: Indicates the diseases included in the product (at the sale of the product, the vaccination information will be recorded for the animal and available in the “Vaccination” window)
- To add or remove an illness, select the disease and click Add or Remove .

“Label configuration” tab:

- Quantity: The quantity of the product to be sold by default. This quantity can be used for products frequently sold in a large quantity such as a box of 24 canned foods or a complete box of 6 pest control products.
- French and English: You can write a generic prescription for the product. You will be able to make the necessary adjustments when prescribing the product to your client. If used, the description is mandatory in both languages.
- Warning message: You can add a warning message to your prescription. To add a warning message to the list, you must go to **“Configuration” < “Tables” < Warning message**

“Applicable taxes” tab:

- Applicable taxes: Select all applicable taxes for this product. By default, when you create a new product the taxes will be applied. (see module 11 for more details)

2.2.3 Review/Setup Procedures

A good preparation of the product catalog will facilitate your usage of the software. You must plan several days in order to finalise the product list. Before starting the data entry of your catalog, you should take the time to evaluate the categories based on the list of existing products in the catalog. If required, add new product categories in order to reorganize the products.

See section **2.1 Maintenance of Product Categories**

In order to start the work on the existing product catalog of the software, we suggest a procedure that, according to our experience, will be easier and more efficient.

- Verify the products by Revenue Category
- Keep or invalidate the product (do not delete the product, instead invalidate the product)
- Identify if the products should only be used within a group (Example: vaccines)
- Assign the product to the proper category
- Modify the internal description (if necessary)
e.g. Internal description: MCRC Development 4kg
Invoice description: Medi-Cal Royal Canin Canine Development 4kg
e.g. Internal description: CD Canine 20 lbs
Invoice description: C/D Canine 20 lbs (Hills)
N.B. The French and English descriptions are mandatory
- Add the missing products

“Price” section:

- Modify the products by Revenue Category
- Enter the unit cost of the product at the unit sold level (for a can, a tablet or pill, etc.)
- Enter the mark-up or the sale price.
- Choose a round to. In term of marketing it’s better to have a rounded price. Example 9.89\$ instead of 9.86\$.
- Enter a flat charge if necessary (dispensing, labelling, cost of vials, etc.)
- Use a fixed price instead of using the unit cost to calculate a sale price (prevents the sale price from fluctuating with the unit cost)

* Many clinics use the fixed price to prevent the product’s sale price from fluctuating with the unit cost and instead manually increase their prices once or twice a year

“Options” section:

- Identify the products sold via prescription. If you want the product to be available via the prescription window this option must be selected.
- Identify the controlled substance

“Orders point” tab:

For the products to be managed using the automated ordering function:

- Activate orders (the product will be included in the automated ordering function)
- Enter the minimum and maximum inventory values

“Supplier tab”:

- Select the default supplier
- Select a supplier
- Enter the supplier’s product code
- Repeat the previous 2 steps for each required supplier
- Indicate the quantity of products contained in the product ordered.
For the products sold at the unit level but ordered by the case or bottle, the quantity should indicate the number of units in the package (see the example below – 24 cans per case)

Order points	Suppliers	Vaccines	Label configuration	Applicable taxes
	By default	Supplier	Product number	Qty./Format
▶	<input checked="" type="checkbox"/>	CDMV	114059U	24
*	<input type="checkbox"/>			

“Vaccines” tab:

- Identify the diseases contained in the product. For more details see module 2
N.B.: We strongly suggest the creation of groups to manage the administration of vaccinations.
(See the section on the inscription process of groups in the catalog in point 4)

“Label configuration” tab:

For products with a repetitive dosage (ointment, heartworm, etc.):

- Indicate the default quantity of the product sold (optional)
- Indicate the default dosage (bilingual)
- Choose a default warning message if applicable
-

“Applicable Taxes” tab:

- Identify the applicable taxes
- Administrative fees or interest should not be taxed

3. Services

3.1 Maintenance of Service Revenue Categories

3.1.1 Description

The service category groups services with similar characteristics. The category is used by many statistical reports. The category is the link between the service item and the GL account to which the sale will be attributed.

To access your Service Category, click on: **Catalog > Service Revenue Categories...**

3.1.2 Nomenclature

The nomenclature used in the Service Category window:

GL account	Description (French)	Description (English)
▶ Revenu on services	Ajustements (Services)	Adjustments (Services)
Revenu on services	Anesthésie	Anesthesia
Revenu on services	Antiparasitaire (services)	Anti-Parasite (services)
Revenu on services	Chirurgie	Surgery
Revenu on services	Comportement	Behavior
Revenu on services	Consultation	Consultation
Revenu on services	Consultation technique	Consultation technique
Revenu on services	Dentisterie	Dentistry
Revenu on services	Dermatologie	Dermatology
Revenu on services	Échographie	Ultrasound
Revenu on services	Euthanasie	Euthanasia
Revenu on services	Information/suivi	Information/follow up
Revenu on services	Injection	Injection

- To add a service category, click  choose the appropriate GL Account using the drop-down menu and enter the name of the desired category.
- To modify an existing category, select it and make the desired changes. You can change its name or change the GL Code to which it is attached.

- You cannot delete a category if it has been used in the software
- You can create as many product categories as needed to support your needs.

3.1.3 Review/Setup Procedures

The configuration procedure of service categories is normally performed during the inscription of services in the catalog. You can create as many service categories as you require suiting your statistical needs. The software offers a predefined set of service categories.

To add or modify a service category go to: **“Catalog” < “Service Revenue Categories”**

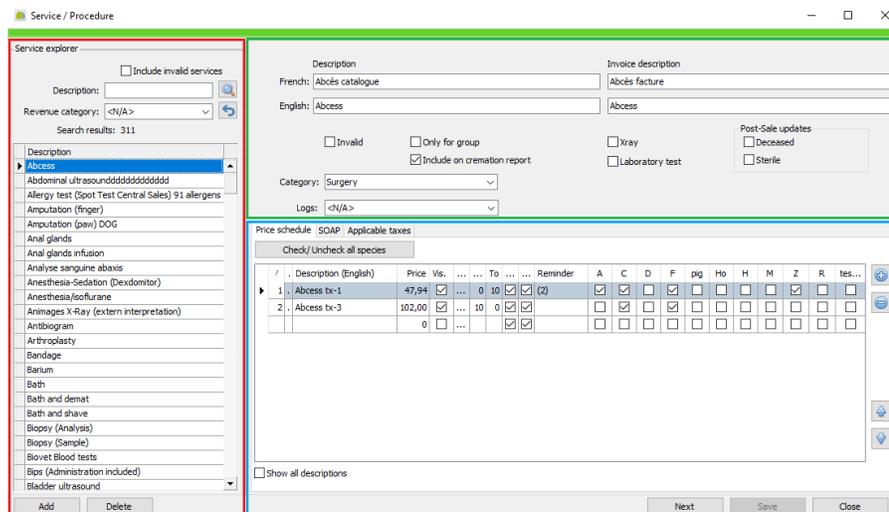
3.2 Services Configuration

3.2.1 Description

The service table contains all of the services the clinic needs to manage. Normally these are the services sold by the clinic. The software can also be used to manage other services that the clinic would like to keep for internal usage.

3.2.2 Nomenclature

The nomenclature used in the Service window:



Red section:

Service explorer

Include invalid services

Description: 🔍

Revenue category: <N/A> ↕

Search results: 311

Description
▶ Abscess
Abdominal ultrasound
Allergy test (Spot Test Central Sales) 91 allergens
Amputation (finger)
Amputation (paw) DOG
Anal glands
Anal glands infusion
Analyse sanguine abaxis
Anesthesia-Sedation (Dexdomitor)
Anesthesia/isoflurane
Animages X-Ray (extern interpretation)
Antibiogram
Arthroplasty
Bandage
Barium
Bath
Bath and demat
Bath and shave
Biopsy (Analysis)
Biopsy (Sample)
Biovet Blood tests
Bips (Administration included)
Bladder ultrasound

Add Delete

Include invalid services: Also display services with an invalid status. Before creating a new service, it is better to verify if it does not exist in invalid form.

Description: Enter one or more characters of the service name. For example: Searching for “Cas” will give you all services with “cas” inside the description.

Revenue category: Choose a category from the drop-down menu. You will display all services of a specific category if you enter no characters in the description field.

“Add” button: Allows you to add new service

“Delete” button: Allows you to delete a service if it has not been used. If it has been used, you will have to invalidate it (see in the green section)

Green section:

Description		Invoice description	
French:	Consultation	Consultation	
English:	Consultation	Consultation	
<input type="checkbox"/> Invalid	<input type="checkbox"/> Only for group	<input type="checkbox"/> Xray	Post-Sale updates <input type="checkbox"/> Deceased <input type="checkbox"/> Sterile
	<input type="checkbox"/> Include on cremation report	<input type="checkbox"/> Laboratory test	
Category:	Consultation		
Logs:	<N/A>		

- Description: Internal description of the service used by the search mechanisms.
- Invoice description: Description of the service visible on the client's invoice.
- Invalid: Invalidates a service in the catalog. This is the way to remove a service from the list if it has already been used.
- Only for group: Service can only be sold within a group. More details on point 4.
- Include on cremation report: Used for euthanasia and/or cremation services. The animal will be registered in the cremation list: **"Report" < "Client/Patient" < "Cremation list"**
- X-ray: Indicates that the x-ray function will be invoked when the service is sold to define the X-ray parameters and to include it in the x-ray log: **"Report" < "Logs" < "X-rays"**
- Laboratory test: Indicates that the service is a test that is used with Lab integration (See module 27)
- Post-Sale updates: Identifies the status of the animal once the service is sold (updates the animal automatically)
- Category: Identify the service category
- Logs: Register if the service must be included in register

Blue section:

“Price Schedule” tab:

A service can have one or many price schedules, which means that you can define one service with a unique description and further qualify it by a price schedule with its unique description and price.

It is important to understand that each price schedule is identified by a type (unitary, weight range, time range, etc.) that is linked to optionally one or many reminders and applies to one or many species and sexes.

Here is the impact that this will have on the price schedule. The price schedule will only be available if the animal fulfils all of the selected criteria (type, reminder, species and sex). The system, for example, will not let you sell a feline hysterectomy to a male canine of 45 kg. The power and flexibility of the price schedule let you define one castration service with multiple prices specific to male felines and canines instead of creating a multitude of services.

Price schedule SOAP Applicable taxes

Check/ Uncheck all species

.. /	Description (French)	Description (English)	Price	Vis.	Type	From	To	Male	Female	Reminder	Labo.	C	F
1	0 à 5 kg	0 to 5 kg	160,00	<input checked="" type="checkbox"/>	weight range	0	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	6 à 10 kg	6 to 10 kg	170,00	<input checked="" type="checkbox"/>	weight range	5	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	11 à 20 kg	11 to 20 kg	180,00	<input checked="" type="checkbox"/>	weight range	10	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	21 à 30 kg	21 to 30 kg	190,00	<input checked="" type="checkbox"/>	weight range	20	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	31 à 40 kg	31 to 40 kg	200,00	<input checked="" type="checkbox"/>	weight range	30	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	41 à 50 kg	41 to 50 kg	210,00	<input checked="" type="checkbox"/>	weight range	40	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	51 à 60 kg	51 to 60 kg	220,00	<input checked="" type="checkbox"/>	weight range	50	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	61 kg et plus	More than 61kg	250,00	<input checked="" type="checkbox"/>	weight range	60	...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Félin	Feline	100,00	<input checked="" type="checkbox"/>	Unit	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)		<input type="checkbox"/>	<input checked="" type="checkbox"/>
			0	<input type="checkbox"/>	Unit			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

Show all descriptions

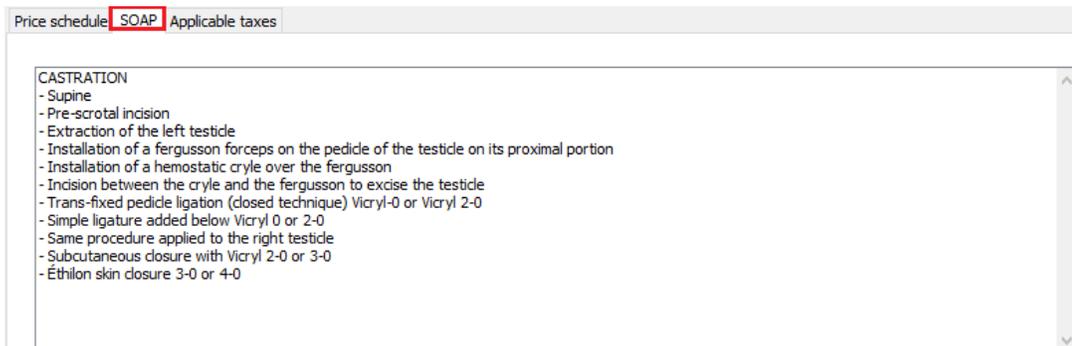
Save + Next Save Cancel

- Description (French): French description of the price schedule
- Description (English): English description of the price schedule
- Price: Price for a specific schedule
- Vis.: Add the description of the price schedule to the service description on the invoice

- Type: Identifies the type of price schedule to use:
 - Unit (single price)
 - Per kg (price per kg)
 - Time range (minutes – The price applies to a set of time values in the form of “from” and “to”)
 - Weight range (kilograms – The price applies to a set of time values in the form of “from” and “to”)

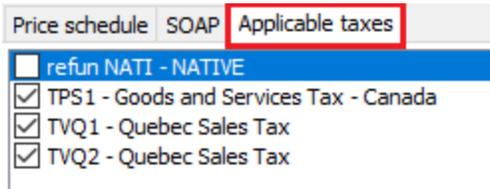
***** Rule: the weight must be greater than the first value, less than or equal to the second value *****
- From, To: Identifies the “From” and “To” values used by the weight (kg) and time interval (minutes) price schedules
- Gender: Identify for which gender(s) the price schedule is valid
- Reminder: Identifies one or more reminders that will be generated when the service is sold
- Labo.: Identifies a supplier and one or more lab tests that will be generated when the service is sold
- Species: Identifies for which species the price schedule is valid
-  : Add a new schedule price before the selected one
-  : Delete the selected schedule price
-  : Move the selected schedule price upwards
-  : Move the selected schedule price down

“SOAP” tab:



The SOAP Text provides a feature that allows the user to setup predefined text that will be inserted in the medical file when the service is sold. The text can vary from free-form text to structured parameters to help you log the information gathered during an exam or consultation.

“Applicable taxes” tab:



Check the boxes of taxes that must apply in your province.

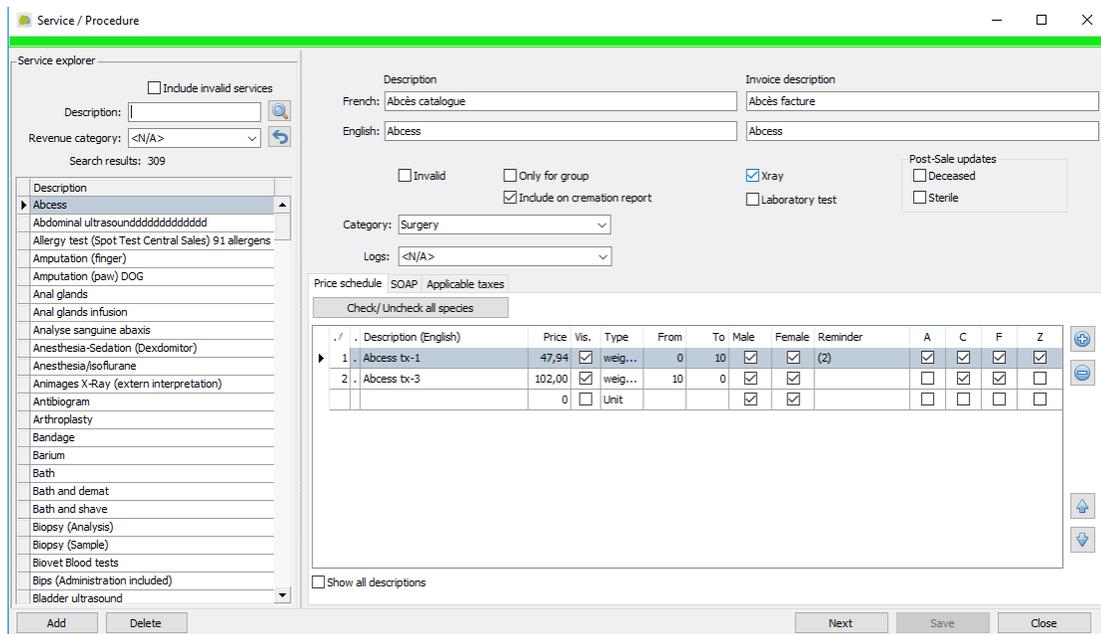
3.2.3 Review/Setup Procedures

A good preparation of the service catalog will facilitate your usage of the software. You must plan several days in order to finalise the service list.

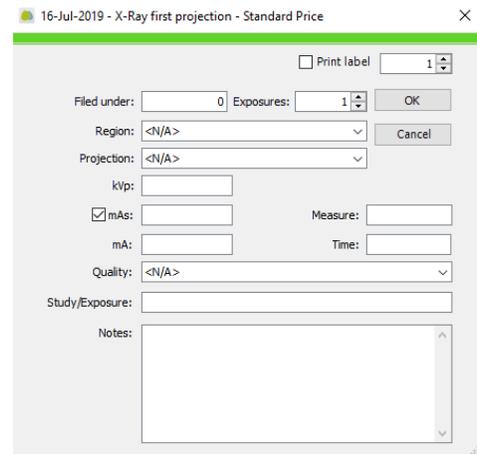
Before starting the data entry of your catalog you should take the time to evaluate the categories based on the list of existing services in the catalog. If required, add new service categories in order to reorganize the services.

See section 3.1 Maintenance of Service Categories

In order to start the work on the existing service catalog, we suggest a procedure that, according to our experience, will be easier and more efficient. To add or modify a service go to: «Catalog» < «Services»



- Verify the services by Revenue Category
- Keep or invalidate the service (do not delete the service, instead invalidate the service)
- Identify if the services should be only used within a group (See section 4)
- Indicates whether the service is an X-ray, a lab test or a cremation service (Sale of an X-ray service, see image on the right)
- Assign the post-execution status (if applicable)
- Assign the right category
- Edit the description (if necessary)
- Add missing services



The impact of defining a service as an X-ray is that when you sell the X-ray service in the medical file, a window for the X-ray will pop-up and require you to complete the components of the X-ray.

In order to use this feature, the tables for the Region, Projection, Quality, etc., must first be configured in: **“Configuration” < “Tables” < “X-ray”**.

Using this function will automatically include this X-ray in the X-ray log, let you print a label with the X-ray parameters and include the details of the X-ray in the medical file.

“Price schedule” tab:

Price schedule		SOAP	Applicable taxes																	
Check/ Uncheck all species																				
#	Description (English)	Price	Vis.	...	...	To	...	...	Reminder	A	C	D	F	pig	Ho	H	M	Z	R	te...
1	0 to 5 kg	160,00	<input checked="" type="checkbox"/>	...	0	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	6 to 10 kg	170,00	<input checked="" type="checkbox"/>	...	5	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	11 to 20 kg	180,00	<input checked="" type="checkbox"/>	...	10	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	21 to 30 kg	190,00	<input checked="" type="checkbox"/>	...	20	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	31 to 40 kg	200,00	<input checked="" type="checkbox"/>	...	30	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	41 to 50 kg	210,00	<input checked="" type="checkbox"/>	...	40	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	51 to 60 kg	220,00	<input checked="" type="checkbox"/>	...	50	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	More than 61kg	250,00	<input checked="" type="checkbox"/>	...	60	...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Feline	100,00	<input checked="" type="checkbox"/>	...	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
		0	<input type="checkbox"/>	...			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Modify the services by Revenue Category
- Enter or modify the description of the price schedule (in both languages)
- Enter the desired price
- Check if you want the description to be visible on the invoice. If the option is selected (by ticking the box “Vis.”) The description of the service on the invoice will be the description of the service registered here (Example: Canine castration - 0 to 5 kg)

Account- Mr John Smith 24954 - Solutions Vet Inc. TEST 5.7

<input type="checkbox"/>	Date	Qty	Description	Unit price	Line total
<input type="checkbox"/>	Animal: Toby (40248)				
<input type="checkbox"/>	16-Jul-2019	1,00	Canine castration (group)		
<input type="checkbox"/>	16-Jul-2019	1,00	Canine Castration - 0 to 5 kg	160,00 \$	160,00 \$
<input type="checkbox"/>	16-Jul-2019	1,00	Canine castration (group)		
<input type="checkbox"/>	16-Jul-2019	1,00	Canine Castration	160,00 \$	160,00 \$

Buttons: Close, Adjustment, Delete, Taxes, Invoice note

- Determining the type of the price schedule

How to choose which type to use and why:

Let's take, for example, a castration service that can apply to both the feline and canine species. The type will provide you with the feature of combining the prices for both species under the same service and automate how the service will be charged.

A Unit price for the feline species (you pick the price)

A Weight Range price for the canine species, which will be automatically selected based on the weight of the animal.

The impact this will have is that when you sell the castration service using the Grp/Serv/Prod button, you will only have one castration service to choose from, which will contain all of the different combinations of price schedules.

Thus, the selection and the sale process will be faster and simple to perform, and the risk of selling the wrong service will be greatly diminished.

- Unit: Pick a unit price (If you have multiple unit prices, you will choose which one to apply at the time of sale)
 - By kg: The price is per kg and will be calculated at the sale based on the weight of the animal (Example: incineration, or cremation)
 - Time range: The price varies depending on the number of minutes during sale
 - Weight range: The price varies from the weight inventory (Example: castration from 11 to 25kg). The price list is automatically selected at the time of sale according to the weight of the animal.
- Other components of the price schedule
 - Identify the sex for which the price schedule applies
 - Identify the reminder(s) to be generated at the time of sale
 - Identify the lab requests to be generated at the time of sale
 - Identify the species for which the price schedule applies

4. Groups

4.1 **Description**

A group is really a container of services and/or products already defined in the catalog. The group has no component of price; the prices are provided by the product and service catalogs. The group table contains all of the groups defined and used by the clinic. Groups are created to simplify the search and the sale of products and services that are usually sold together.

4.2 **Reason to use groups**

A group is used in order to define a template for more complex services. With one click of the mouse, the group allows the sale of multiple services and products. The products are automatically removed from inventory, and controlled substances and X-rays are included in their respective logs. Here are a few examples of groups that would be contained in your catalog:

Urinary blockage
 Euthanasia
 Castration, Hysterectomy
 Vaccinations
 etc.

The group can be configured in many ways on the invoice:

- You can show the group and its price with no detail
- You can show the group, its price and the detail with no price
- You can show the group, no price and the detail with its price

4.3 Nomenclature

The screenshot shows the 'Group maintenance' window with several sections:

- Group explorer:** Contains search filters like 'Include invalid groups', 'Group description', 'Service description', 'Service category', 'Product description', and 'Product category'. It shows search results for 'Vaccin base + leptos + bordetella'.
- Description:** Fields for 'French' and 'English' descriptions, both containing 'Vaccin base + leptos + bordetella'. It also has checkboxes for 'Invalid', 'Detail visible on invoice', and 'Detailed price visible on invoice'.
- Invoice description:** A field containing 'Vaccin base + leptos + bordetella'.
- Applies to:** Checkboxes for 'Male' and 'Female'.
- Selection:** Radio buttons for 'Product' (selected) and 'Service'. It includes a search field, a category dropdown, and 'Add' and 'Add to bottom' buttons.
- Group elements:** A table listing items with their status, chargeability, visibility, discount, and quantity.

Description	Chargeable	Visible	Discount (%)	Quantity
S Vaccination DHPP + Bord. + Lepto.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00
P Vanguard Bordetella NASAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00
P Vanguard Plus DHLPP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00

Red section:

Group explorer

Include invalid groups

Group description: 

Service description: 

Service category: 

Product description:

Product category: 

Search results: 4

Description
▶ Vaccin base + lepto + bordetella
Vaccin base + rage félin
Vaccin base félin
Vaccin Rage

Add Delete Copy

Include invalid groups: Also display groups with an invalid status. Before creating a new service, it is better to verify if it does not exist in invalid form.

Group description: Enter one or more characters of the group name. For example: Searching for “vac” will give you all services with “vac” inside the description.

Service description: Enter one or more characters of the service included in a group.

Service category: Displays the groups with services of the selected category.

Product description: Enter one or more characters of the product included in a group.

Product category: Displays the group with products of the selected category.

Green section:

Description		Invoice description	
French:	Vaccin base + leptos + bordetella	Vaccin base + leptos + bordetella	
English:	Vaccin base + leptos + bordetella	Vaccin base + leptos + bordetella	
<input type="checkbox"/> Invalid	<input checked="" type="checkbox"/> Detail visible on invoice	<input type="checkbox"/> Applies to	
	<input type="checkbox"/> Detailed price visible on invoice	<input checked="" type="checkbox"/> Male	
		<input checked="" type="checkbox"/> Female	

- Description: Internal description of the group used by the search mechanisms.
- Invoice description: Description of the group visible on the client's invoice
- Invalid: Invalidates a group in the catalog. This is the way to remove a group from the list if it has already been used.
- Detail visible on invoice: Displays the details of each item on the invoice. The price will be shown on the group description.
- Detailed price visible on invoice: Displays the price of each item. The group is posted without price.
- Applies to: Choose de gender of the group concerned.

Pink section:

Selection

Product
 Service

 Category: <N/A>

Description /

- Selection: Select your catalog choice (product or service) to find an item to include in the group.
- Category: Displays products/services in the selected category.
- Add: Adds the product/service to the group at the current cursor position in the group.
- Add to bottom: Adds the product/service at the end of the group.

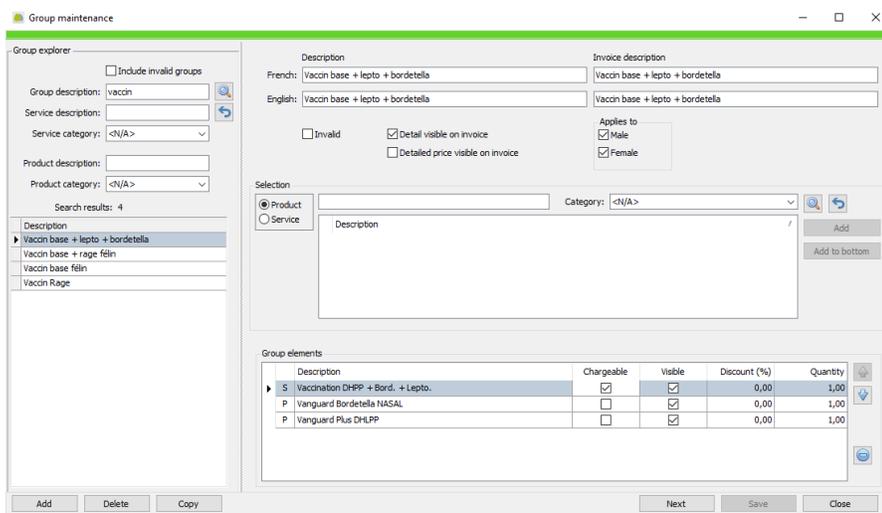
Blue section:

Group elements					
	Description	Chargeable	Visible	Discount (%)	Quantity
▶ S	Vaccination DHPP + Bord. + Lepto.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00
P	Vanguard Bordetella NASAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00
P	Vanguard Plus DHLPP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0,00	1,00

- **Description:** Displays the items (service: S or product: P) inside the group.
- **Chargeable:** The price of the item will be added to the group.
- **Visible:** The item will be visible on the invoice taken into consideration the options at the group level.
- **Discount (%):** A discount to apply to this item for this group.
- **Quantity:** The quantity of item(s) sold. A quantity of 0 will force the user to enter a quantity when selling the group.
-  : Move item up in the list
-  : Move item down in the list
-  : Removes the item from the group

4.6 Review/Setup Procedures

A good preparation of the group catalog will facilitate your usage of the software. We suggest the following procedure, which should simplify the creation of groups:



Group maintenance tab

1. Create the group

- Click on Add in order to enter the description of the group you want to create
- Enter the bilingual group description (what you want to use internally)
- Enter the bilingual description that you want the client to see on the invoice

2. Include Services

- Click on the Service selection tab
- Enter the selection criteria and perform a search
- Select the appropriate service and add it to the group
- Indicate if the service is chargeable, visible on the invoice, any discount for this group and the default quantity to be sold
- Add as many services as required to complete this group

3. Include Products

- Click on the Product selection tab
- Enter the selection criteria and perform a search
- Select the appropriate product and add it to the group
- Indicate if the product is chargeable, visible on the invoice, any discount for this group and the default quantity to be sold
- Add as many products as required to complete this group

Options tab

1. Select the required options

- Click on the Options tab (for this group)
- Select the sex the group applies to
- Indicate if the detail of the element of the group should be displayed on the client's invoice
- Indicate if the price of each element of the group should be displayed on the client's invoice – this option is only available if the prior option was selected

2. Notes

- You can add as many services and or products required to complete the group
- You can modify the contents of the group when required
- The buttons on the right of the window let you delete or move an element up or down in the group
- The Copy button can be used to create an exact copy of an existing group, which can then be tailored accordingly.

5. How to manage your Inventory

5.1 Define your Suppliers

Each of your suppliers should be set up as accounts in the software.

From the **Search screen...** click «**New Person**»...

Click on the Company tab... check the box for Supplier...

Enter the company information...

Enter your account number in the Ref. No. field (this reference number is printed on orders, thus would be set to your account or reference number with the supplier)

Person - [8] - Solutions Vet Inc. TEST 5.7

Person Person **Company**

Clinic **Supplier** Manufacturer

Reference no.: R 4028 No cheques

Name: CDMV Language: French

Search name: CDMV Preferred establishment: Solutions Vet

Contact: Last statement: 20-Jan-2009

Address

Postal code: J2S 7C2 City: St-Hyacinthe, QC

Civic no.: 2999 Street: boul. Choquette

Apt.: Supp.: CP 608

Email Refused

Phone(s)

Type	Number	Extension	Note	SMS
Work	(800)668-2368			<input type="checkbox"/>

Patient(s)

Include patients that are: Given Deceased

Name	Birth date	Kg	Lbs	Sex, sterility	Species	Primary breed	Secondary breed	Primary color	Secondary color	Outside
						<N/A>	<N/A>	<N/A>	<N/A>	<input type="checkbox"/>

5.2 Enable Inventory Tracking of a Product

“Order Points” tab

Order points Suppliers Vaccines Label configuration Applicable taxes

Activate orders

Order when at:

Order up to:

1. Check “Activate Orders”
 2. Enter your minimum and maximum quantities (in individual units, i.e. number of pills or cans)
 - Once your stock quantity reaches the “Order when at” value, the system will pick that product for re-order.
 - The “Order up to” represents the desired stock quantity to reach for the product.
- (Note: when Vetware generates your order, we may exceed this value as we cannot order), partial bottles of pills or cases of food etc.

“Suppliers” tab

Order points **Suppliers** Vaccines Label configuration Applicable taxes

By default	Supplier	Product number	Qty./Format
<input checked="" type="checkbox"/>	CDMV	112947	1
<input type="checkbox"/>			

1. Enter the Quantity/Format (the package size/volume), i.e. how you purchase that product (e.g. 24 for a case of canned food or 500 for a bottle of pills)
 - If you sell the item exactly as it is purchased, without “breaking it down” the Quantity/Format would be 1 (e.g. bags of food, bottles of shampoo, etc.)
2. Enter the Supplier(s) and Product number(s)
 - You may enter multiple suppliers for each Product, with their respective product numbers
 - Next, set the Default supplier (the supplier from whom you typically purchase this product). This setting is used when generating orders, which will be discussed in the next section

“Inventory” Button

Product inventory for RC Vet. Diet Canine Adult Large Dog Bag / 12 kg - Solutions Vet Inc. TEST 5.7

Establishment: Date of the transaction:

Lot No	In stock	Transaction type	Quantity	Expiry	Manufacturer lot	Comment
1	5	▼				

1. Click the Inventory button to access to the product inventory functions
2. Click Add to create a new lot or Modify to change an existing lot
3. Select the type of Transaction (i.e. Delivery, Correction, Internal Usage, etc.)
4. Enter the quantity, the expiration date (if desired), the manufacturer lot and comment (optional)...
 - Save when complete
 - Quantity is always recorded as a positive number... based on the transaction type, the system will make the appropriate stock adjustment (positive or negative)
 - If the Transaction type selected is Correction, you will see an Increase or Decrease selection
5. “Print Label” Used for controlled substances when tracking inventory by lot. Generates a bar code label which includes the lot number.

“Usage” Button



This button displays all the operations for the product during the selected period.

Usage RC Vet. Diet Canine Adult Small Dog Bag / 1.5 kg - Solutions Vet Inc. TEST 5.7

Display by: Month Week
 Number of period(s) to display: 13
 Group by year

Dates range: From: July 2018 To: July 2019

Transaction type	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Correction													
Delivery													
Expired													
Internal use													
Return to inventory													
Return to supplier													
Sale								- 1					- 1
Transfer													
Waste													

Detailed transactions (Sale / July 2019)

Date	Lot	Qty	Description	Done by	Client / Animal
24-Jul-2019		1	- 1 RC Vet. Diet Canine Adult Small Dog Bag / 1.5 kg	M. Solutions Vet	(24954) Mr John Smith / Toby

5.3 Inventory Reports

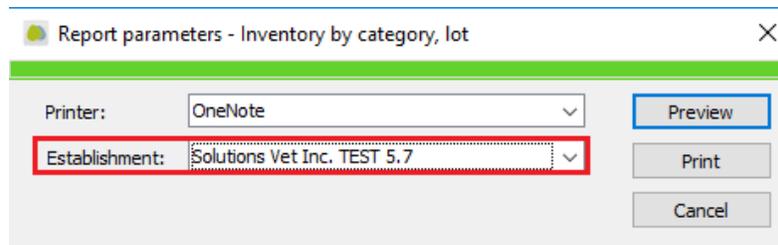
From “Reports” < “Inventory”

Report Configuration Boutique Window ?

Catalog
 Client / Patient
 Accounting
Inventory
 Deposits
 Receivables
 Referrals
 Logs
 Statistics
 Transactions
 Sales

Inventory by category
 Inventory by category, lot
 Inventory by product
 Inventory by product, lot
 Inventory by planogram
 Product with negative lot
 Expired products
 Adjustment transactions
 Controlled substances transactions
 Daily transactions by category
 Daily transactions for a specific category
 Value of the inventory by category as of
 Value of the inventory (extended) by category as of

Note that all inventory reports can be displayed by establishment. Select the clinic from the “Establishment” drop-down menu.



Report parameters - Inventory by category, lot

Printer: OneNote

Establishment: Solutions Vet Inc. TEST 5.7

Buttons: Preview, Print, Cancel

1. Inventory by category:

- Shows current inventory levels for all products (shows bar code, cost price, current stock quantity and value of current stock)
- Products are grouped by category with a page break between each category
- Total value of stock is given on the last page, totals are also reported on each category

2. Inventory by category, lot

- Same as above, but shows separate stock quantity for each lot # of each product
- Includes lot # and expiry dates

3. Inventory by product

- Alphabetical list of all products with product no., UPC code, cost price, current stock quantity and stock value

4. Inventory by product, lot

- Same as above, but shows separate stock quantity for each lot # of each product
- Includes lot # and expiry dates

5. Inventory by planogram

- Displays current inventory levels for all planogram-related products (displays Product no, UPC code, Cost price, current inventory quantity and current inventory value)
- The products are grouped by planogram with page break between each planogram.
- The total inventory value is given on the last page, the totals are also displayed at each planogram.

6. Products with negative lot

- Alphabetical list of products where current stock quantity is a negative value
- Displays Product no, lot and quantity
- It is recommended to do a check (weekly or monthly) of this report in order to correct your inventory.

7. Expired product

- Alphabetical list of products where lot expires on or before a user-defined date
- Includes Product no, Lot no, current stock quantity and value and expiry date
- It is recommended to do a check (monthly) of this report in order to correct your inventory

8. Adjustment transactions

- Shows all adjustments made to products during a user-defined period
- You can select the type(s) of transactions (correction, delivery, expired, internal use, return to inventory, return to supplier, sale, transfer and waste) that you want to display in the report
- Products are listed alphabetically, grouped by category

- Includes the adjustment type, date, quantity, value, description and employee's name who made the adjustment

9. Controlled substance transactions

- Shows all transactions for controlled products during a user-defined period
- Products are listed alphabetically, grouped by category
- Report includes Product no, shows the starting quantity, amount sold/delivered/other and ending quantity for each transaction

10. Daily transactions by category

- Same as above, for non-controlled products

11. Daily transactions for a specific category

- Same as above – user selects a single product category and date range for the report

12. Value of the inventory by category as of

- Calculates the stock quantities and inventory value as of a user-defined date
- Products are listed alphabetically, grouped by category
- Shows the quantity on hand as of the selected date, cost and value (for each product, category and grand total for all products)

13. Value of the inventory (extended) by category as of

- Same as above, but also including resale value (Price and Total Price)

6. How to order from CDMV

To access the orders: **“Catalog” > “Orders”**

From this window, you can review and/or process orders, request the software to automatically prepare an order for you (which you can further modify, as needed) OR manually prepare your own order.

6.1 Generate an order:

- From the above screen, select the supplier and click **“create”**.

Product category	Number of products
10001 NC Adulte 9p72	1
10013 NF Gestion du poids 6p72	1
10026 AM Soins 6p72	2
10092 MM Entrepôt	1
10098 AM Littérature 1/2 5p60	1
Product	1

- Default supplier only:
 - When selected, the software will only pick products where the default supplier matches the supplier you selected prior to generating this order
 - When unselected, the software will pick all products that have a product code listed for the selected supplier, regardless of the Default Supplier setting on the product
- Generate an empty order:
 - Select this option if you wish to manually prepare your own order
 - When unselected, the software will generate an order for you based on the following:
 - Current stock quantity is less than or equal to the “Order when at” value
 - Order Quantity = “Order up to” value minus current stock quantity (minus any order quantities found in open orders)
 - Order Quantity also considers the “Quantity/Format” value, thereby calculating how many “whole” packages to order, as opposed to how many pills or cans, etc.
 - The Order Quantity may cause your end stock quantity to exceed the “Order up to” value as we cannot order partial packages (i.e. 7 cans of food, etc.)
 - Product Category or Planogram allows you to select all, or only specific categories to order
 - By default, all categories are selected
 - To select specific categories, select the first category... hold the CTRL key and continue clicking to select multiple categories
 - Click Generate to create the order or click Cancel to exit without creating an order
 - An order confirmation appears indicating the Order number and number of items selected



6.2 Modify an order:

Select the order and click Modify (or double-click on the order)

Order processing

Establishment: Solutions Vet Inc. TEST 5.7 Display orders created since: 30-Apr-2019 Refresh

Supplier: CDMV (2) Status: Opened order Partial reception

Type: Orders Templates Non-controlled substances Controlled substances New order Complete order

Confirmed order All

Order #	Date	Supp. order	Status	# Items	B/O	Confirm date	Delivery date	Note
3404	29-Jul-2019		New	7				

Modify

Order detail [CDMV (2) No: 3404] - Solutions Vet Inc. TEST 5.7

Add multiple items Item search

Code	Description	UPC	On-hand	Format	Min/Max	Suggested	Ordered	Cost	Total
987654	21 jours pour dresser votre chien	9782501043014	- 2	1	0/1	1	1	17,00 \$	17,00 \$
118092	Adaptl Collar - Large	899484001708	0	1	0/1	1	1	17,97 \$	17,97 \$
117201	Advantage II for Dog - Large pqt / 4	056500092502	0	1	2/3	3	3	36,57 \$	109,71 \$
4808518	Collier Greencol 30cm	3552793063122	9	1	9/10	1	1	6,73 \$	6,73 \$
10968	Prescription Diet Canine and Feline a/d Can/5.5 oz.	052742567013	0	1	0/1	1	1	61,04 \$	61,04 \$
100715	Prescription Diet Feline w/d Minced Chicken Can/5.5 oz.	052742945514	2	1	2/3	1	1	43,93 \$	43,93 \$
112942	RC Vet. Diet Canine Adult Small Dog Bag / 4 kg	030111481603	6	1	6/8	2	2	25,32 \$	50,64 \$

Notes:

Adaptateur universel de flacon (MicroClave) Supplier code: 119046

Adaptl (D.A.P.) Spray Btle / 20 ml 118766

Adaptl (D.A.P.) Spray Btle / 60 ml 114912

Adaptl Collar - Large 118092

Adaptl Collar - Small 118093

Adaptl Diffuser Only 119010

Adaptl Refill Btle / 48ml 119011

Adjustable and washable back hand-held harness for dogs - XLarge 4808530

Adjustable Car Safety Belt w/ Snap Hook 1 in 111859

Advantage Brochure for Cats - Bilingual 109702

Advantage Brochure for Dogs - Bilingual 109703

Advantage How To Use Brochure - French 5598

Advantage II for Dog - Large 117205

Advantage II for Dog - Large pqt / 4 117201

Advantage II for Dog - Small 117203

Advantage II for Dog - XLarge 117202

- This screen displays the order details, including: Supplier code, Description, UPC code, On-Hand quantity, Format (packaging size), Min/Max, Suggested quantity, Order quantity, Cost and Total (representing the total value = order quantity X package cost)

- To change any Order quantity, click in the « Ordered” field and change the value. You can view the Usage history by selecting a product (click anywhere on the line) and clicking on the Usage button
- To remove a product from the order, click on the product and click Delete.
- Cost values are adjusted accordingly with your changes.
- Click Add to include other products. An empty line is added to the end of the order. Search by product description or by code.
- Click on the drop-down menu
- Choose the product(s)
- Modify the Order quantity as desired
- Click OK to save and close the order... click Save to save your changes and continue to review the order

***** Once the order is saved, new items will be re-sorted alphabetically *****

6.3 Submitting an Order

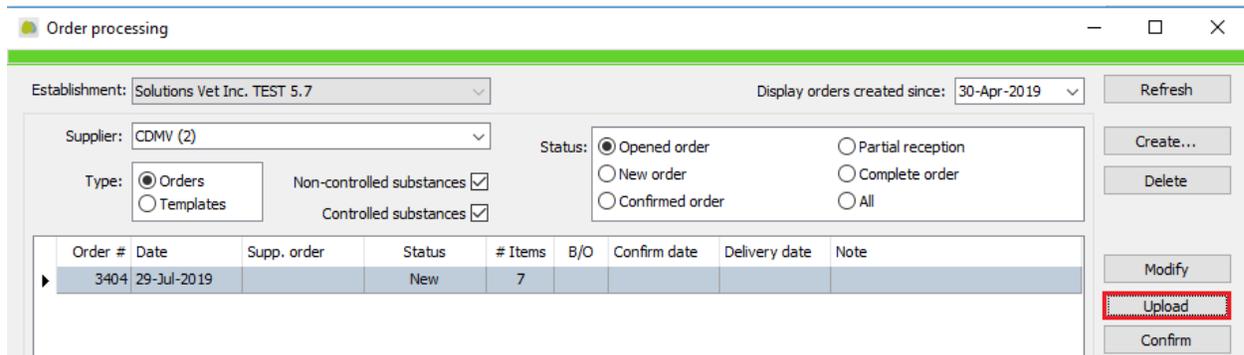
Once your order is complete, you may print in PDF and send it by email or fax it to your supplier

- Click on the order to select it, then click Print.

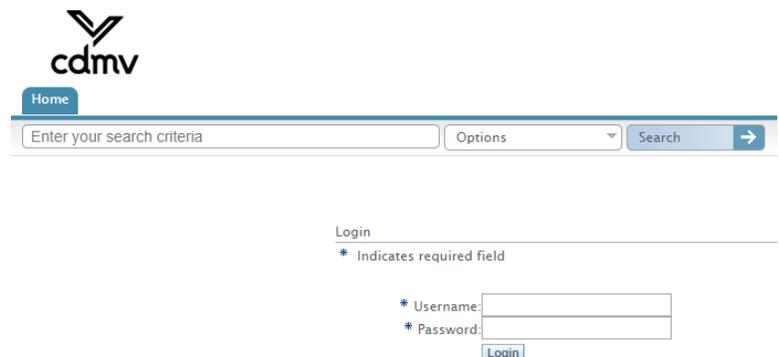
Purchase Order				Order: 3404
				Date: 29-Jul-2019
Supplier:		Sold to:		
CDMV		Solutions Vet Inc. TEST 5.7		
2999 boul. Choquette		2999 boul. Choquette		
CP 608		CP 608		
St-Hyacinthe, QC		St-Hyacinthe, QC		
Item	Quantity	Product No	Product description	
1	1	987654	21 jours pour dresser votre chien	
2	1	118092	Adaptil Collar - Large	
3	3	117201	Advantage II for Dog - Large pq / 4	
4	1	4808518	Collier Greencol 30cm	
5	1	10968	Prescription Diet Canine and Feline a/d Can/5.5 oz.	
6	1	100715	Prescription Diet Feline w/d Minced Chicken Can/5.5 oz.	
7	2	112942	RC Vet. Diet Canine Adult Small Dog Bag/ 4 kg	

The software supports online ordering through CDMV

- Click on the order to select it, and then click Upload.



- You will be taken to the CDMV website, enter your user name and password, then click Login



- Review your items and click Add to Cart



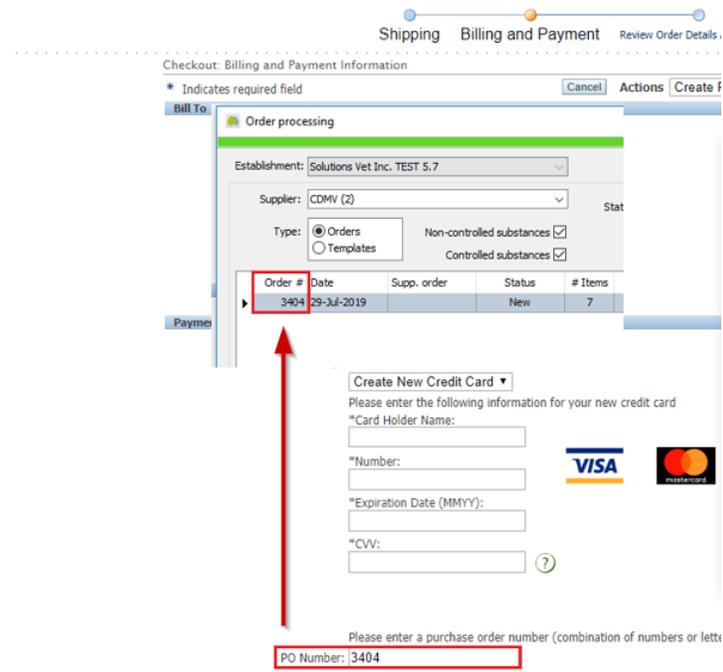
Quick Order

[B/O List](#) [Add to Cart](#)

CDMV Code	Quantity	Description	Size	Return	Stock	Availability at CDMV		
						B/O	Status (?)	B/O Date
118092	1	Adaptil Collar - Large	UN	↶	✓		Regular	Equivalent
117201	3	Advantage II Large Dog	P4	↶	✓		Regular	Equivalent
4808518	1	Collar Greencol 30 cm	UN	↶	✓		Regular	Equivalent
10968	1	Prescription Diet Canine and Feline a/d Can / 5.5 oz	P24	↶	✓		Regular	Equivalent
100715	1	Prescription Diet Feline w/d Minced Chicken Can/5.5 oz	P24	↶	✓		Regular	Equivalent
112942	2	RC Vet. Diet Canine Adult Small Dog Bag/ 4 kg	UN	↶	✓		Regular	Equivalent

Once your order has been added to the cart you can add new items to it from CDMV transaction website.

In step 2 of 3 make sure that the “PO Number” matches that of your “Comm #” of your VetWare “Order Processing” window. If no number appears in the “PO Number” field of the transaction website, enter it manually. This number will be used for order confirmation.



On the next page, you have an opportunity for a final review and can make substitutions for unavailable products, etc., before clicking Checkout

6.4 Confirm an order

Note that this step is optional and is not a prerequisite for receiving your merchandise in your software.

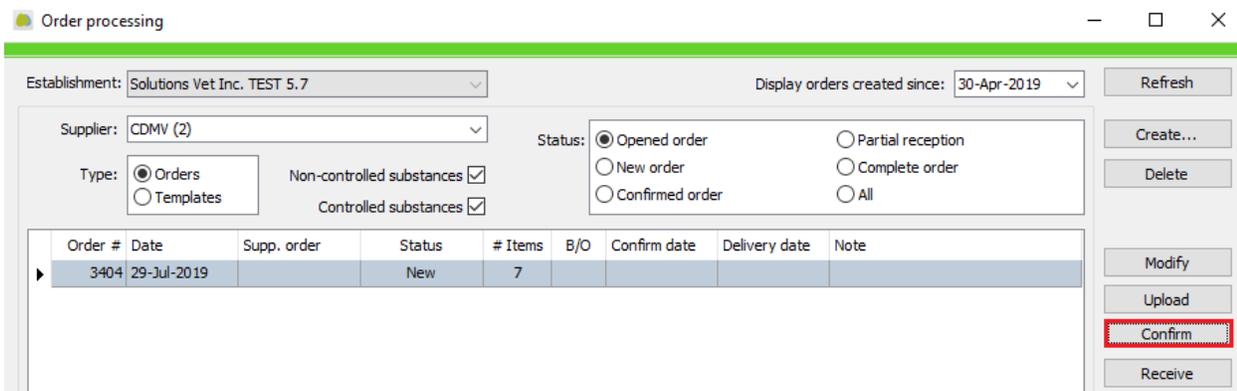
The order of products that you place directly on the CDMV transaction website is not necessarily the same as the one you have created in your software. Often once on the CDMV website, you add products, delete them, change the quantities or make substitutions when one of them is not available or it is discontinued. This assumes that before you receive your order in your software, you must manually correct your order to reflect the one you made on the CDMV transaction website.

With the “Order confirmation” function it will be possible in a “click” to make the corrections to your order waiting to be received. In summary, this function will do:

- Product additions or removal
- Quantity changes
- Cost price updates
- Additions of new products not listed in your product catalog

Select the order and click “Confirm”

***** You must confirm your order once it's completed on the web site and before receiving it *****



A window will appear in which you will need to enter your username and password. Make sure you enter the correct data if you have more than one CDMV account (Clinic vs Boutique)



The “Confirm order” window will be displayed. By default, only products with changes from the original order will be displayed.

Confirmation of order 3406 - Solutions Vet Inc. TEST 5.7

2 items changed from a total of 8

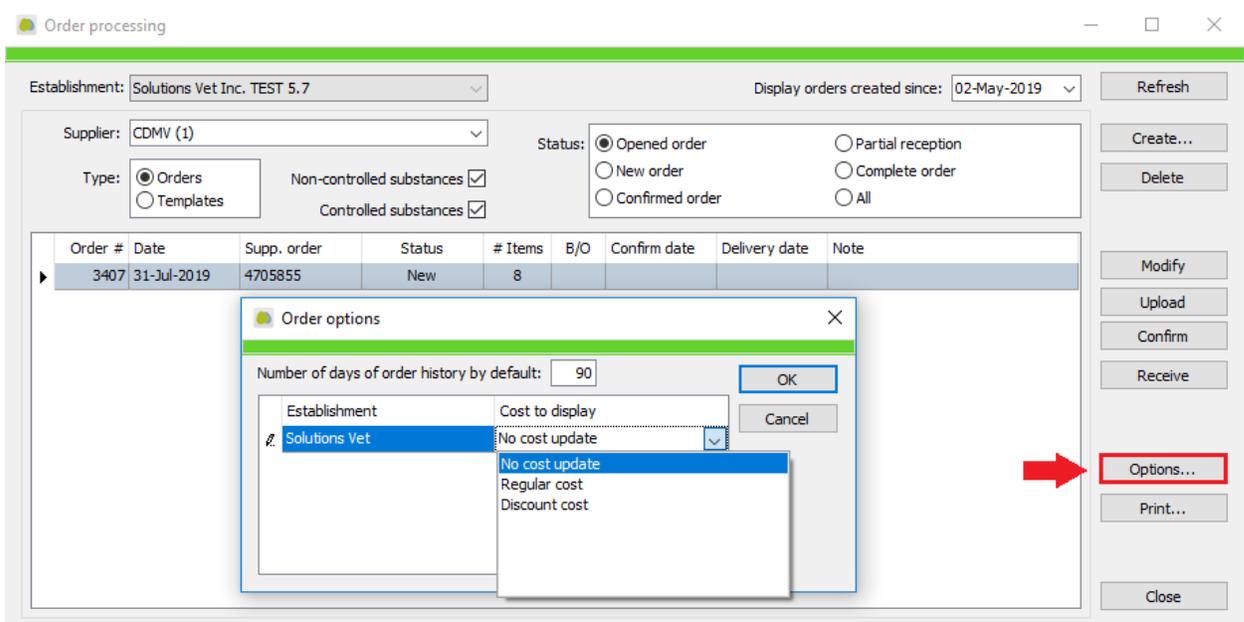
Prod #	Product description	Action	New	Original qty	Qty CDMV	Original cost	Markup	Sale price
987654	21 jours pour dresser votre chien	Deleted		1		17,00 \$		28,29 \$
118480	Mini Anchor for IV Set	Added			2	1,00 \$	2,0000	0,20 \$

Accept Cancel

Description of column headers:

- **Action:** Indicates the type of change made to an item, either: Deleted, Modified or Added

- **New:** Indicates whether the product will be added to your list of new products in your catalog. It will be added under the “Incomplete Products” tab (see section 2.2.2)
- **Original qty:** Quantity originally requested when the order was uploaded
- **Qty CDMV:** Quantity spent on the CDMV transaction website
- **Cost upd.:** Check box that allow to automatically change your cost price upon receipt of your order in your software
- **Original cost:** Your cost price currently in your catalog
- **Cost (CDMV):** Price currently at CDMV according to your choice of option in the “Order option” window (no cost update, regular cost or discount cost)



- **Markup:** Factor currently entered in the software for this item that is used to calculate your selling price
- **Sale price:** The sale price that will be recorded in your software after the reception of your order if you check the “Cost upd.” box. Please note that if you had checked the box “Fixed price” in your catalog product, the selling price will remain unchanged

When you see a blue circle with the letter “i” displayed to the left of a price, it means that this particular item has a selling price based on the markup factor and that it will be displayed with this new selling price after the reception of the order. When you have a new product in your order you might also see that blue circle until you add the format in the catalog product.

Confirmation of order 3413 - Solutions Vet Inc. TEST 5.7

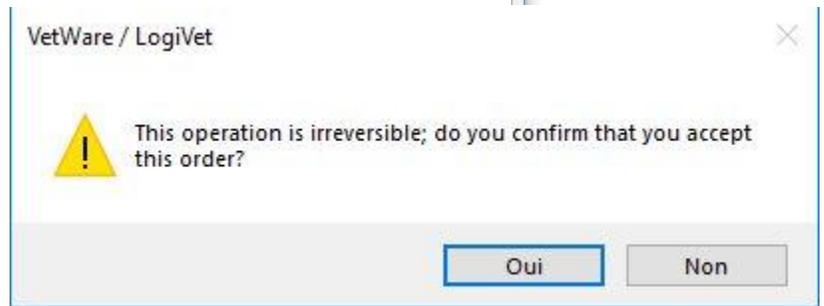
Select all cost updates 9 Items changed from a total of 9

Prod #	Product description	Action	New	Original qty	Qty CDMV	Cost upd.	Original cost	Cost (CDMV)	Markup	Sale price
737	Prescription Diet Canine t/d Small Bites Bag/5 lb.	Modified		9	9	<input type="checkbox"/>	17,87 \$	20,10 \$		27,29 \$
124915	PureBites mélange de fœcôan chat 22 g	Modified		1	1	<input type="checkbox"/>	0,00 \$	3,57 \$	0,0000	0,00 \$
108085	RC Vet. Diet Canin Urinary S/O Can / 385 g	Modified		3	3	<input type="checkbox"/>	34,99 \$	37,21 \$		48,99 \$
112944	RC Vet. Diet Canine Adult Bag / 10 kg	Modified		3	3	<input type="checkbox"/>	55,09 \$	61,04 \$		
112945	RC Vet. Diet Canine Adult Bag / 15 kg	Modified		2	2	<input type="checkbox"/>	70,00 \$	83,76 \$		102,99 \$
112943	RC Vet. Diet Canine Adult Bag / 4kg	Modified		1	1	<input type="checkbox"/>	25,32 \$	27,92 \$		35,99 \$
112948	RC Vet. Diet Canine Adult Can / 385 g	Modified		2	2	<input type="checkbox"/>	31,58 \$	34,24 \$		44,99 \$
124933	Catit Creamy Lickable Cat Treat - Assorted Multipack Pkg...	Added	Yes		1			5,35 \$		
124932	Catit Creamy Lickable Cat Treat - Salmon Flavor Pkg / 12	Added	Yes		1			5,35 \$		

This item has a sale price based on markup

The price is unavailable, because the product's format is missing

Click the “Accept” button and the “Confirm Order Accept” window will be displayed. Click yes.



Your order is then “Confirmed” and you will be ready to receive your items when they are delivered.

Order processing

Establishment: Solutions Vet Inc. TEST 5.7 Display orders created since: 03-May-2019 Refresh

Supplier: CDMV (2)

Type: Orders Templates Non-controlled substances Controlled substances

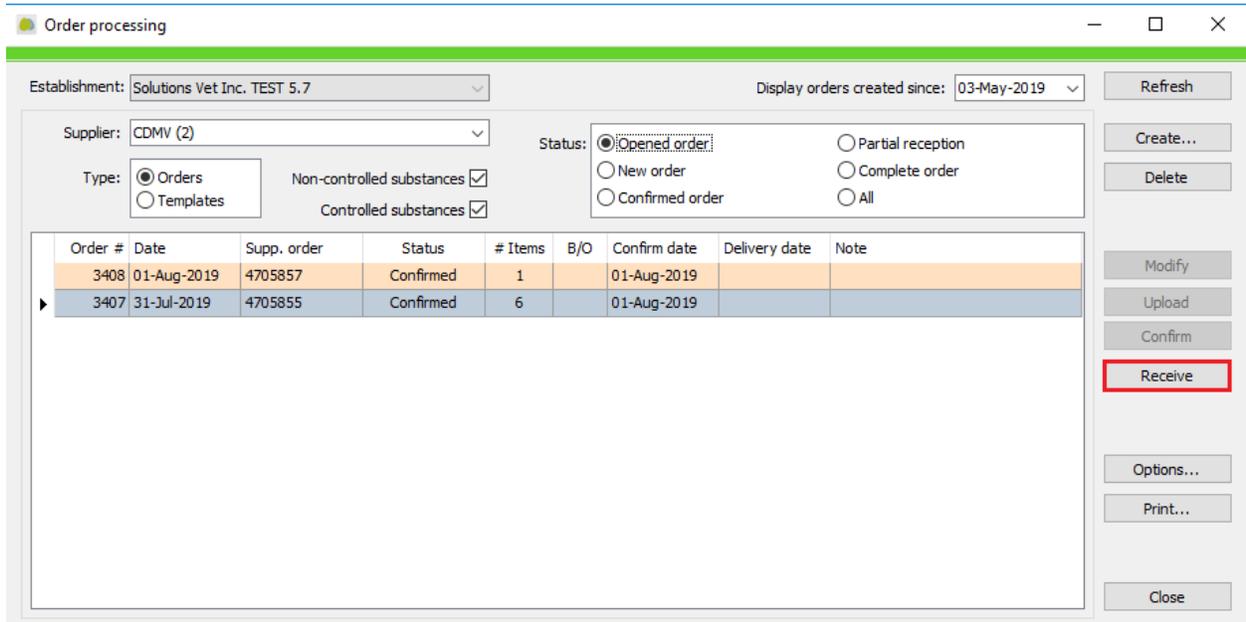
Status: Opened order Partial reception New order Complete order Confirmed order All

Order #	Date	Supp. order	Status	# Items	B/O	Confirm date	Delivery date	Note
3408	01-Aug-2019	4705857	Confirmed	1		01-Aug-2019		
3407	31-Jul-2019	4705855	Confirmed	6		01-Aug-2019		

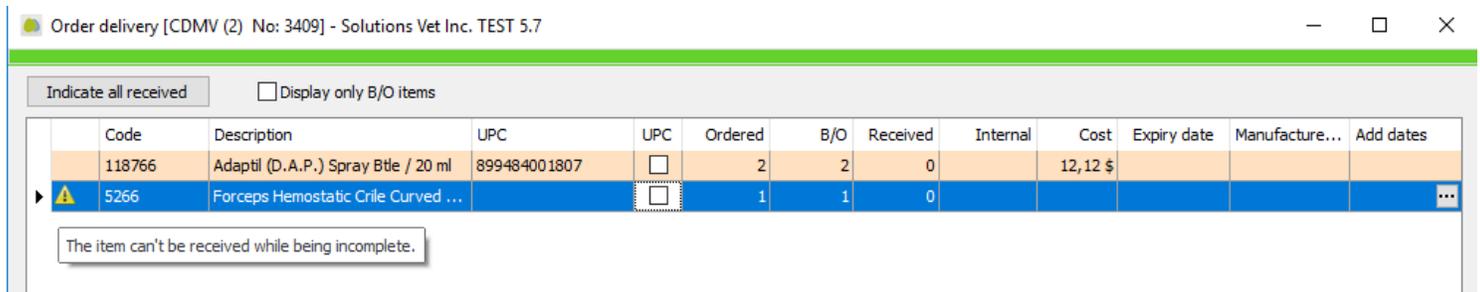
Modify Upload Confirm Receive

6.5 Receive an order

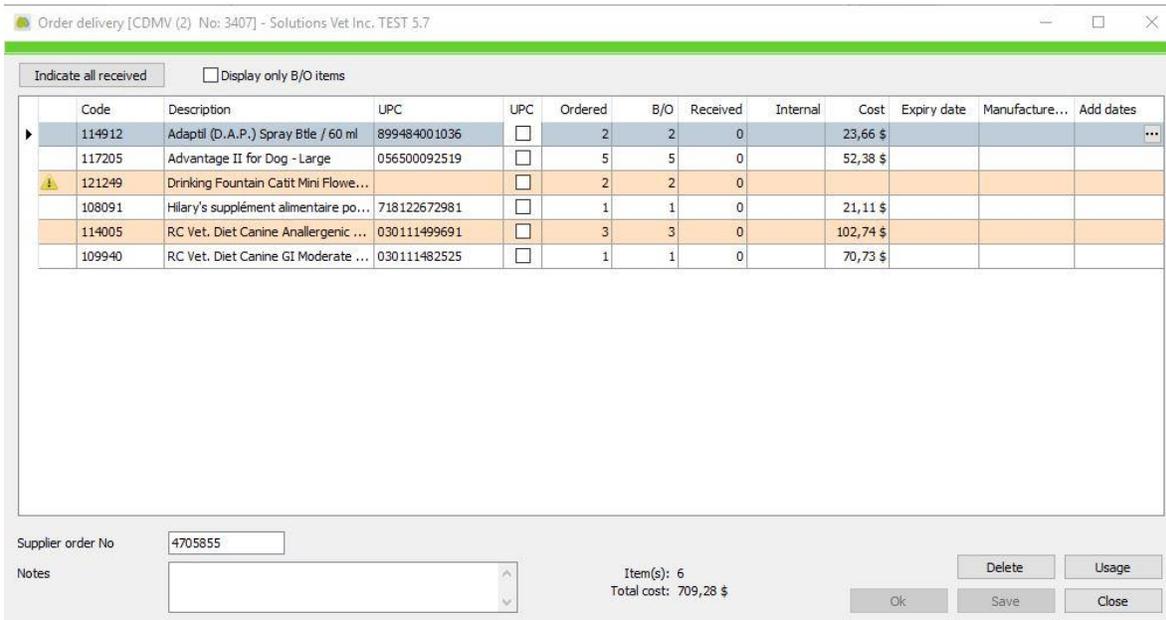
- Select the order and click **“Receive”**



If you have incomplete products, you must first complete them in your product catalog.



Reconcile your software order with the packing slip from your supplier



- If you received all items, click “Indicate All Received” and the software will auto-fill the Received column, setting the received quantity to the same as the quantity ordered. If some items are not delivered, put 0 into the receive column. Do not forget to keep track of this order when the item will be delivered.
- Enter the expiration date(s) and the manufacturer lot if desired
- You can also update the Cost price to reflect price changes from the supplier.

If you need to modify the cost price, from the “Order delivery” screen, enter **only** the individual pack cost.

When you are finished, click Save or OK to update the inventory of each product with one click

The software will automatically:

- Add the received quantity to your inventory.
- Set the expiry date to the new lot
- Update the Cost Price and the Sale Price on each product
- Update the order status to “Complete” or “Partial Delivery”