Acade my
SOLUTIONS VET

Module 1 - How to Log In / Overview

Module 1– How to Log In/Overview

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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, the software is in continuous development.*

1. How to Log In

To open your software, double-click on the desktop   icon:

(It can be faster to put the icon on the task bar)

From the next screen, enter your user name and password*:

* Note: The use of passwords is not mandatory; you can open the program with just a user name. However, to ensure better security and allow access to the different functionalities, each user should be assigned a unique password known only to themselves.
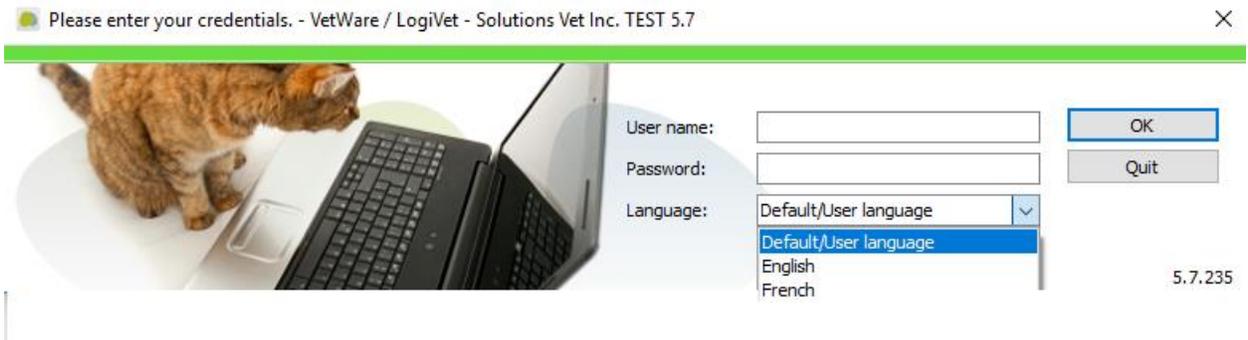
Your software will be set up according to your clinic's criteria. It is possible to change the language if needed. Here are the three options for the language:
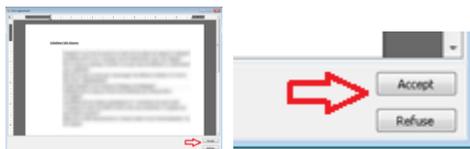**Default/User language** (the one you've chosen in your file**), English** or **French.**
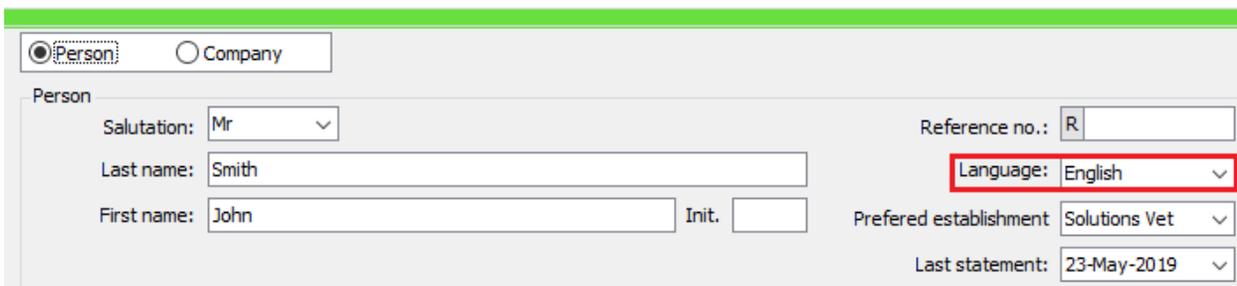
Click on **OK.**

Upon your initial connection, the software will ask you to accept the User agreement.

This will allow you to start the application.

2. <u>Main Screen Overview</u>

The following window shows the main screen.

You can see a toolbar at the top of the screen containing the following buttons:
"Search", "Invoice list", "Visit List", "Prescription List", "Counter sale", "To do list", "Internal usage", "Laboratory tests" and the "Appointment book".

In addition, you can see which Cash Drawer is in use, manage the cash drawers and open the window "Cash Drawer".

File	Function	Catalog	Report	Configuration	Boutique	Window	?		Solutions Vet [pp]

Drawer: Hôpital (5366)

Let's explore the main screen toolbar items:

You can also access them by the "function" menu.

Search: Opens the **search** window. You can have **up to 3** search windows open at a time. It's from this window that you will search your client's file. (We will discuss this in section 3 of this module.)

Invoice   Displays the **invoice list** window. You can search, display or reprint previous invoices. All the details are discussed in **Module 6: How to manage your payments**.

Visit list: Customizable virtual whiteboard showing all visits. You can personalize it to show which clients and/or patients are actually in the clinic. All the details are discussed in **Module 15: Visit list**.

Prescription list: Allows the user to look up a prescription by number and view a list of all prescriptions waiting to be filled. All the details are discussed in **Module 5: Medical file.**

Counter Sale: Used to sell products to clients who don't have a file open at the clinic. However, we recommend that you create a file for every client (even if they just buy products) to be able to keep track of their purchases.

To do list: Displays the list of all your "To Do" reminders. All the details are discussed in **Module 2: How to set reminders and vaccination schedules.**

Internal usage of products: Shortcut designed for scanning products barcodes used in the clinic (ex: food for hospitalized animals) to ensure fast and efficient inventory adjustments

Laboratory tests: Displays queries for laboratory tests sent, processed and completed

Appointment Book: Launches the Appointment book.

Manage cash drawers and shifts

Cash drawer: Uses the drop-down menu to link the local computer to a desired cash drawer.

The use of multiple cash drawers is possible.

Manage Cash Drawers: Opens and closes cash drawers.
Generates shift reports. Used to balance cash registers.

Let's explore the main screen menu items

File	Function	Catalog	Report	Configuration	Boutique	Window	?

- <u>File</u>:   <u>"Change user"</u> (F12)
               <u>"Always display full menu"</u>
               <u>"Always visible"</u>
               <u>"Startup window"</u> :   <u>"Appointment book"</u>
                                      <u>"Search"</u>
                                      <u>"Visit List"</u>
                                      <u>"Display person and animal summary"</u>
               <u>"Exit the software"</u>

- <u>Function</u>:   "Reminder Batches": for managing your postal, phone or e-mail reminders
               All the details are discussed in **module 2: How to set reminders and vaccination schedules.**
               <u>"Invoice list"</u>
               <u>"Visit List"</u>
               <u>"Prescription List"</u>
               <u>"Tools"</u>:   <u>"Service charge update"</u> (Updates the service charge configured for the unpaid account. Go to "Configuration"…"General options"…"Other options"… to configure the service charge)
               "Search"
               "Counter sale"
               "Appointment book"
               "Shift" (Manage Cash Drawers)
               "Open Cash Drawer" (F6) For clinics with a cash register.
               "Reminder list maintenance"
               "Laboratory tests"

- <u>Catalog</u>:   All the details are discussed in the **module 3: Catalog**

               "Product revenue categories" (Manage your product revenue categories)
               "Classification" (for Boutique CDMV)
               "Planogram" (for Boutique CDMV)
               "Orders"
               "Products"
               "Delete empty inventory lots" (all the products lots at 0 will be deleted).

               "Internal usage" (same use as the button 📦 inventory adjustment for in-clinic used products)
               "Shelf cards"
               "Service revenue categories" (Manage your service revenue categories)
               "Service"
               "Groups"

"Price increases": "Update prices…"
          "Restore prices…"
"Synchronize satellites" (for multiple clinics sharing a common catalog)
"Information"

Report: Contains all of the financial and statistical reports available in the software. All the details are discussed in **module 8: Reports**

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

Configuration: "GL Accounts"
"Documents and Forms": for the management of printed documents. All the details are discussed in **module 7: Managing your Word documents**
"Animail": For the management of your e-mail communications. All the details are discussed in **module 16: Animail**
"General options": Customize software settings to suit your needs. All the details are discussed in **module 9: Configuration**
"Tables": manage all of the various drop-down menu choices here. All the details are discussed in **module 9: Configuration**
"Taxes"
"Reminder types":

Boutique: "Boutique"
"Online Boutique"

Window: Shows a list of all open windows to allow you to toggle between screens.

Question mark? "In this version…" Redirects you to soltionsvet.ca to see what's new and fixes for your VetWare version
"About" Shows your configured printers, number of authorized workstations, list of authorized computers and the software version number.
"Academy"
"Start a remote support session"

3. <u>Search Window</u>

This is where you can search your clients' files. Type your client information in a field and click

on the search button 🔍 or click on "Enter". You can use one field or many fields to narrow your search. For example; you could type a last name and an animal name to refine the results. You can also include a first name in the search. Type in the last name followed by a comma and then the first name (without space) (i.e. "smith,rhonda" or simply "smith,r"). If necessary, you can refine your search even more by deselecting the boxes "Deceased" and "Given".

-   If you're doing a phone number search without typing the area code, the clinic's area code will be in by default.

-   Use the % percentage symbol as a wildcard – for example, searching for **%son** would display Thomp**son** and Wil**son.** If you type "%,Sarah" every client who has Sarah as a first name will be displayed.

-   Clinics using barcode scanners can also search by scanning the barcodes displayed on the client's file label or on the animal's file label. The cursor can be in *any* search field when the label is scanned, the software will recognize the fact that you have scanned a file label and will automatically perform the search.

The icon 👥... is used to view the last 20 accounts viewed on this computer
It can be very helpful to find a recently used file.

The ↩ icon is used to clear the search results.
It can be useful to delete all the information before launching a new search.

The Search window contains 4 clickable tabs:
(Owner/Patient… Person… Company and Visit)
Usually you will use the "Owner/Patient" tab to search your client files.

The "Person" tab can be used to search all the clinic's employees (useful to manage staff access or the discount of a previous employee). To display your employee list; select the "Employee" button without filling any field and then click on the search button.

The "Company" tab can be used to search all the clinic's suppliers. To display your suppliers list, select the "supplier" button without filling any field and the click on the search button.

The "Visit" tab contains a service field. It gives you the opportunity to have quick access to the list of clients who purchased that service in the selected date.

The "person or animal summary" section will display some quick data.
The person summary includes: Contact, Notes, Next appointment and Reminders to do.
For its part, the animal summary includes: Note, Problems, Prescription (1 year), Vaccination (Reminder date), Products, Professional recommendations and Next appointment.

Person summary

Mr John Smith

Contact:
smith.john@email.ca
Cellular: (514)555-3333 (SMS)
Work: (450)555-4087

Note:
Do not call in the morning

Next appointment:
None

Reminders to do:
None

Animal summary

Tobby
Male Intact
7 mths
4,5 kgs\ 10 lbs.

Note:
No note

Booklet:

Problems:
None

Prescription (1 year):
Baytril 15mg /co: (8-May-2019)
1 tablet 2 times per day for 5 days
Give 1 pill once a day, for days.

Vaccination (Reminder date):
None

Products (1 year):
None

Professional recommendation(s):
None

Next appointment:
None

4. <u>How to create a person file</u>

In addition to clients, all employees and suppliers should be added to your system as a person (file).

<u>Employees:</u> Define your veterinarians, system users (employees), permissions (security) and discounts.

<u>Suppliers:</u> Define your suppliers (ex: CDMV, Summit...) to make them available in the Order section.

<u>Your clinic:</u> Your clinic will be setup as Person Identification reference # 1 by our team. The information entered here (address, phone number) defines what is displayed on your report headers, etc.

To **Add** a new client, click on the "New Person**"** command.
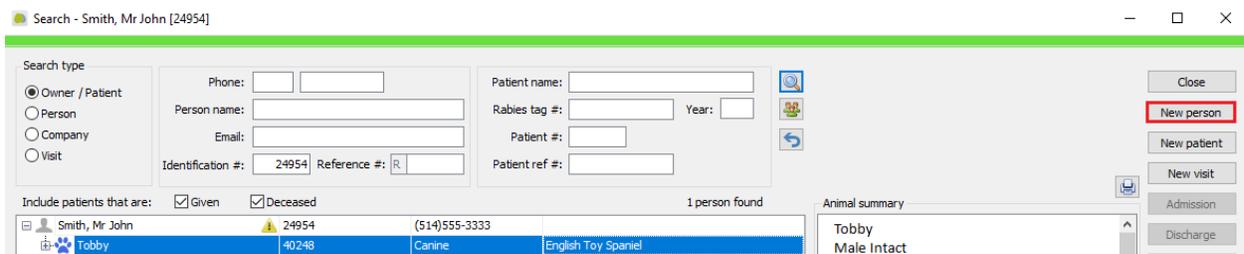
The new person window will open:
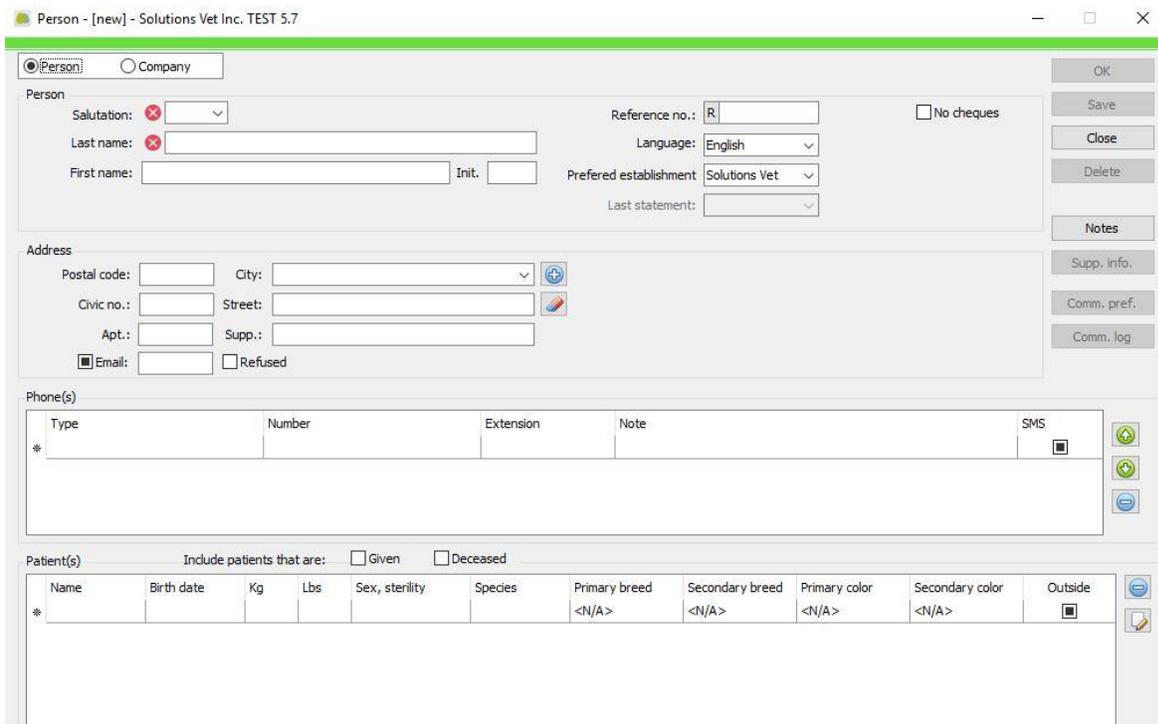
Title: (Mr./Miss/Mrs./Dr./Dre.) This field is mandatory ⊗

Name: Type the last name. This field is mandatory ⊗
First Name: Type the first name.

Ref No.: Reference number is typically the file number of the paper medical file.
- The clinic can define whether or not this field is required. If so, you can define the field under "Configuration"… "General Options"… "Files"… and check mark "Reference Number Required for a New Person".
- If the person is flagged as a Supplier, this reference number is printed on orders (thus would be set to your account or reference number with the supplier)

Language: Determines whether the documents will be printed in English or French for this client.

Postal Code: When you enter a postal code, the system will suggest City & Province based on the postal code entered in the field. If a postal code is found in your client addresses database, the fields "City" and "Province" will automatically be fill and the system will display other client addresses in the right section next to the address field. In this case, you may either:

1. Copy Address – Click on a client/address at the bottom of the screen and select "Copy". The street information and civic number are copied into the current New Person screen. The cursor is set on the Civic no. field so you can easily enter a different house address while keeping the street name.

2. Share Address – Choose this option if you wish to use the same Civic no. and Street information of another client in the database. When an address is shared, if the address is changed on one account, the changes will be reflected on all accounts that share the same address.


If you prefer to manually enter the addresses, you can deactivate this function in: "Configuration"…"General options"…"Other"…" Automatically search addresses with the same postal code".

City: When you manually enter a city in the field, the system searches your database and displays matching cities in a drop-down menu as you type.

- If you see the correct city, click on it to insert it in the field.
- If you do not see the city, finish typing the name and click on the **Add** button ⊕ at the right to add that city to your database.

On the following screen, you will also indicate the province, then click **OK**
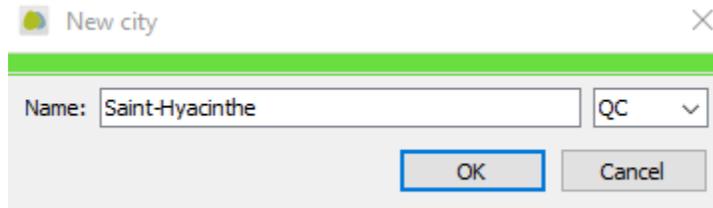
Email: When you enter an email address, you have the option to allow or refuse the use of the email address of the client.
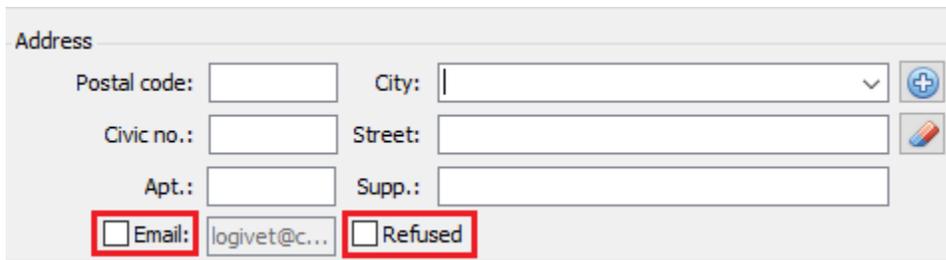
Telephone: (In order of importance)

- Use the Up/Down arrows to sort the phone numbers in order of importance. (The first two phone numbers are printed on labels, etc.)

- When adding a new phone number, the system will default to (XXX) 000-0000 … where (XXX) is your clinic's area code. Of course, you can change the area code if required

- When the user clicks on a phone number in order to input the correct phone number, the cursor is set on the 7-digit area to facilitate its entry.

- Click on ⊖ to delete phone numbers from the list.

- Check the SMS box if the customer has provided a cellular phone number and would like to receive appointment confirmations by text message.

To **Edit** the Account information:

- Select the person's file in the Search screen… then click on "Modify"
- Or double click on the person's file in the search screen to open the "Person" screen

Preferences and Notes

- The "No Cheques" box is check by default for all the clients. If you accept checks from a client, you must uncheck this box to allow payment mode "check" in the account window.
- To add additional notes to the account, click on the icon ![Notes button]
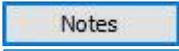
- Notes are displayed in a bubble when hovering over the account.
- If the note is flagged as **Important**, a question mark appears beside the client's name.
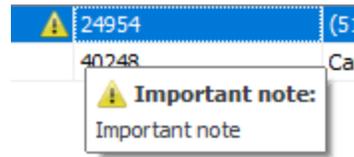
![Smith, Mr John with warning icon]

- Then the bubble will display an exclamation point inside a yellow warning sign.

<div align="center">
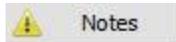
Regular Note   Important Note

</div>

![Regular Note and Important Note bubbles]
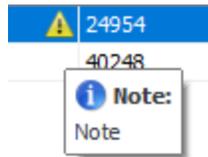
- Also, when viewing the "Person" details screen, if notes are present, the Note icon will look like this: ![Notes icon with warning sign]

   - Notes are internal memos for the clinic and do not appear on the client's record or on the invoices and person or animal summary print.

Company Tab

Under this tab, you can indicate whether this client is a clinic, a supplier and/or a manufacturer.

You are required to enter a Search Name – this will be the name you type in to locate the account.
Finally, you can also enter a contact name on this screen.
All other fields are the same as the "Person" tab.

For the supplier CDMV you must enter your account number in the field "Ref no" to be able to upload your product orders on their website.

Additional Info: (from the window "Person", but "Supp. info" button)

On this screen you can indicate if a person is an employee and manage their access to the software.

Veterinarian/Employee Tab

- Select the "Is a Veterinarian" box if the person you are creating the file for is a veterinarian and enter their licence #.

- Using the drop-down menu from the "Choice of Clinics" and then click to link the veterinarian to your clinic and make this person available for assignment when creating a new visit.

- All other employees should also be "linked" to your clinic. Select your clinic from the drop-down menu and click on so they can be available from various employee searches and/or drop-down menus (such as the allocation of "Person Responsible' on reminders).

"User" Tab

Use this area to setup the person as a "user" of the software.

Profile: Choose security/permission group
- You can limit the access to certain functions (ex: accounting, catalog managing…) for a type of employee (see section 5 – Creating Security Profiles).

- Assign a user name (used for logging in to the software) and enter the user's initials.
- A password may also be assigned
- Activation Date / Expiration Date: These fields are not used.
- If an employee is no longer active, you can use the "Delete" command to remove this person as a system user.

"Discount" Tab

Here you can set a percentage discount that will be automatically applied to all billings for this client.
Product and Service categories are listed in two separate columns.
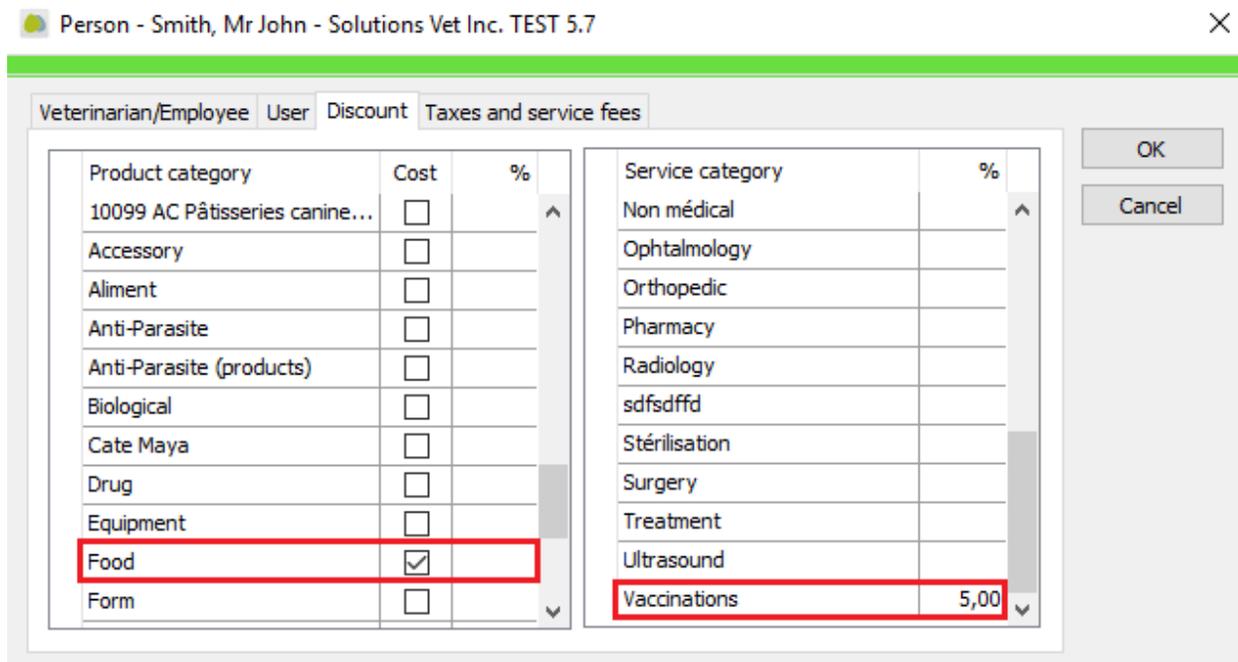
For the products, you have several options:

- By entering a % discount value, the products will be sold with this % discount.
- By placing a check mark ☑ in "Cost", the product is sold at cost price.
- By placing a check mark in "Cost" *and* by adding a % value, the product is sold at cost price *plus* __%.

For the services, simply indicate the percentage discount for each applicable category. In the example above, this client will be billed at cost price for all food purchases and receive a 5% discount for vaccination services.

5. Create & Modify Security Profiles

Your system includes several preconfigured security profiles. You can modify these profiles and create others depending on your needs and your employee categories (Vet techician, accountant, receptionist…). They are useful for limiting access to certain functions of the software, such as reports, order management, price tab. For example, you can limit the access to a price tab in order to avoid changes made by mistakes. To define the user's permissions, please go to:
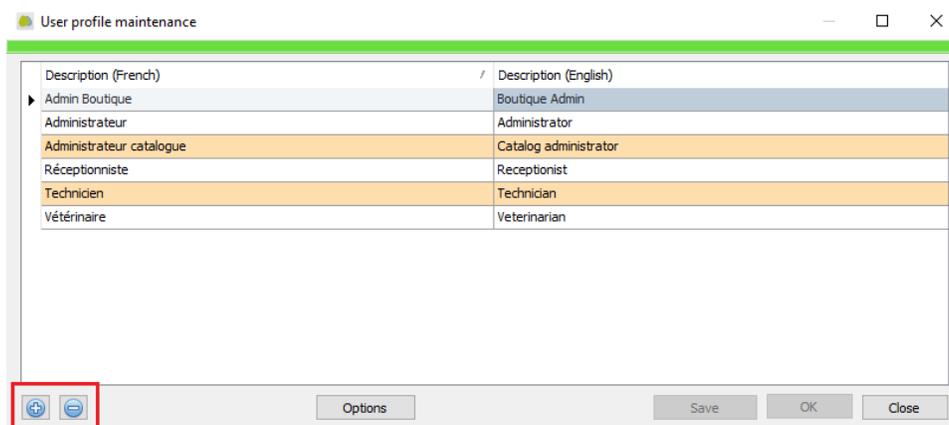
"Configuration"… "Tables"… "User Profile"…

To change the description of an existing profile, select the profile and then click on "Modify**"**.

To create a **new** profile or delete one, click on ⊕ ⊖ Enter in the French and the English descriptions, then click on "Save'.
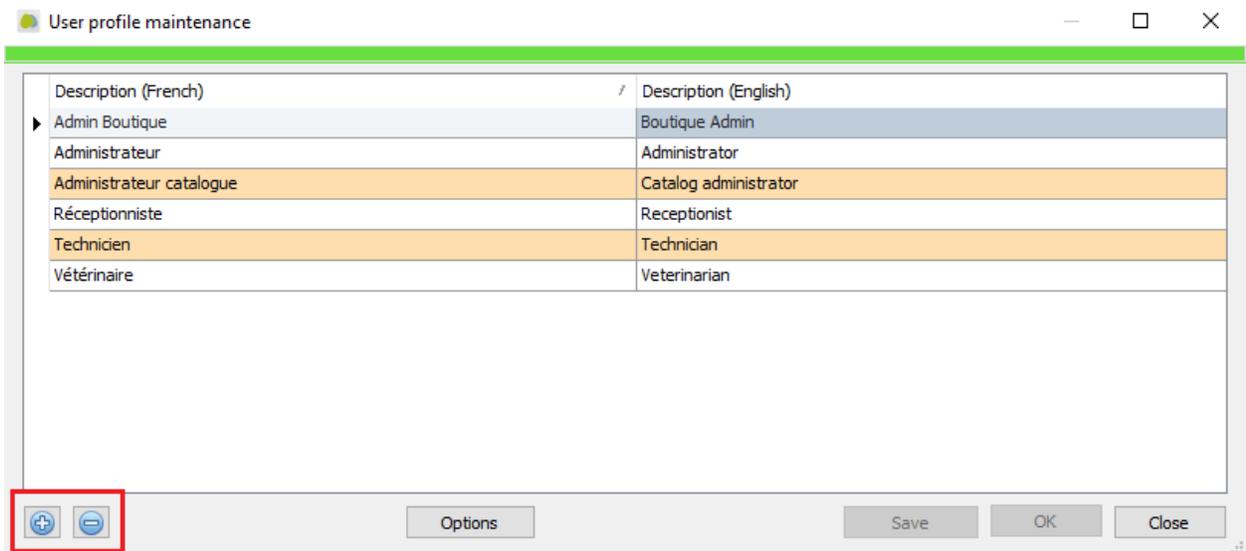
To **modify** the security permissions for a particular profile, select the profile and then click on "Options**"**.

Permissions are separated under several tabs: **Functions… Catalog… Reports… General Options… Tables and Boutique.**

In each tab, indicate which items and functions can be accessed with this user profile.

☐ No check mark means the user does *not* have permission to access that function

☑ A check mark grants the user permission to access that function.