



Academy SOLUTIONS VET

Module 31 - Messaging

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1. What is messaging?

Messaging is a function allows you to communicate with your clients by email and text message (SMS), directly from VetWare. Employees can also communicate with each other through internal messaging. You can also receive communications from the Vet Solutions team.

Easy to use, the pre-configured message templates will be useful for confirming appointments, sending reminders, invoices and miscellaneous communications with your clients.

2. Communication preferences

With the communication preferences feature, your client will be able to indicate how they would like to be notified for different types of reminders, as well as to receive their invoices and statements.

To access a client's communication preferences:

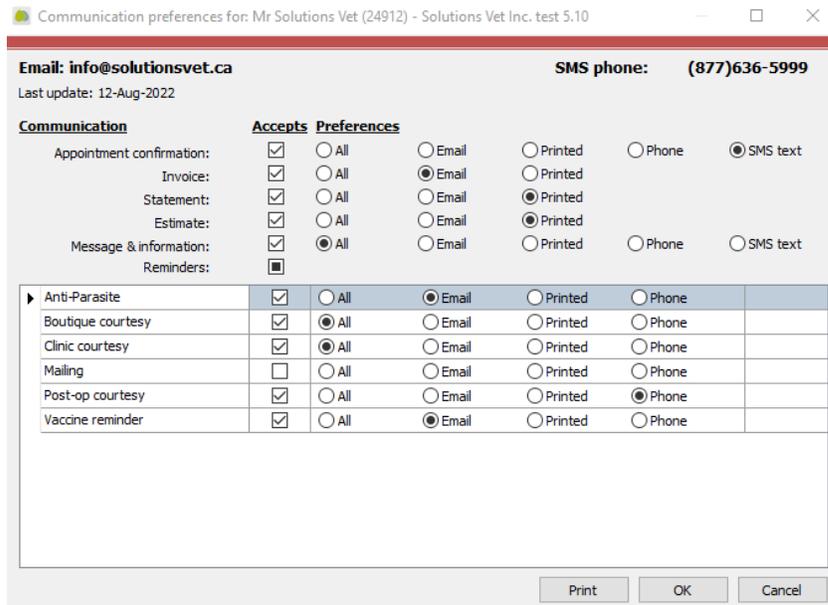
Click on the « Communication Preferences » button located on the right side of the Person record.

The client's communication preferences will be displayed. By default, all communication types will have a check mark in the box under the « Accept » column, which is why it is important to validate the preferences with your clients (e.g., when they arrive for their appointment).

You will be able to change the preferences for the following communications:

- Appointment confirmation
- Invoices
- Statement
- Estimate
- Message & Information

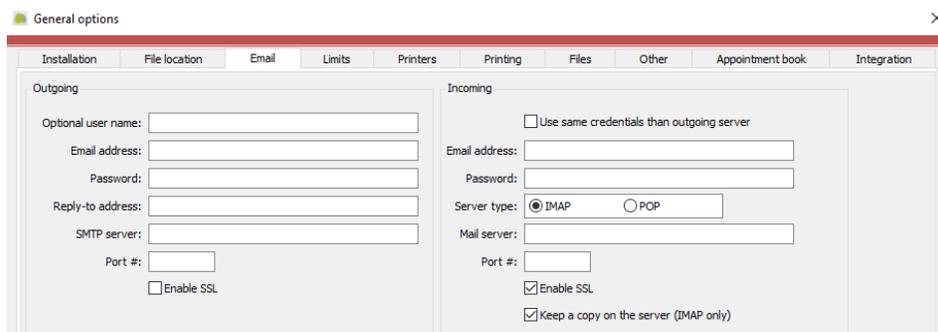
The reminders section (the bottom section), which often contains several types of reminders, can also be set up very precisely.



3. Email

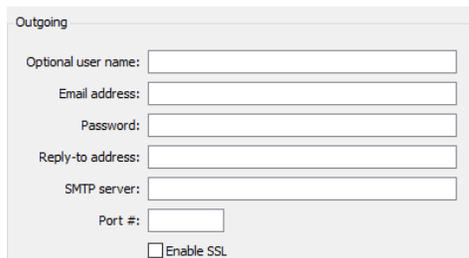
3.1 Configuration

To set up a mailbox that will be used by VetWare, go to « Configuration » > « General Options » > « Email ».



3.1.1 Outgoing email

This section allows you to set up the mailbox of your choice to use for sending email from VetWare. You just have to fill the fields with the required information. Your supplier or person who configured your mailbox can provide you the SMTP server name as well as the port to use.



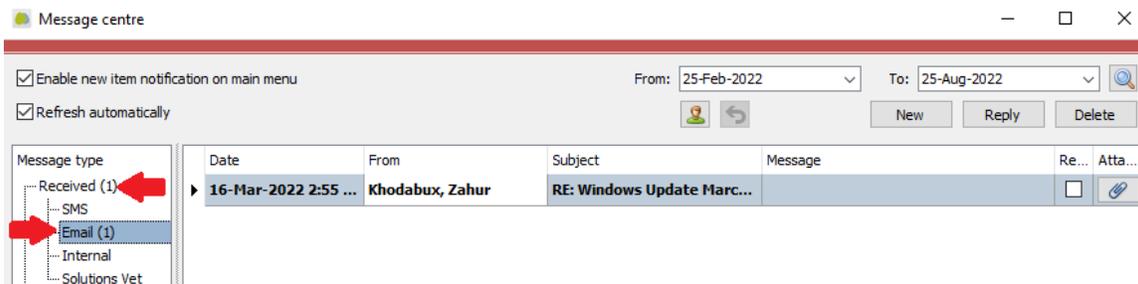
***** Make sure you know your sending limit through your provider's SMTP server to avoid inconveniences. *****

If the information you enter is incorrect, an error message will be displayed during the sending process.

Note that if you change the password of your mailbox, do not forget to change it in VetWare as well.

3.1.2 Incoming email

Allows you to send a copy of the email received in your mailbox to the VetWare message centre.



Simply fill the fields with the required information. Your provider or the person who configured your mailbox can provide you with the server address and port to use depending on the type of server (IMAP or POP).

Incoming

Use same credentials than outgoing server

Email address:

Password:

Server type: IMAP POP

Mail server:

Port #:

Enable SSL

Keep a copy on the server (IMAP only)

In the setting of incoming emails, we advise you to use an email box that only your clients will use. If this is different from the outgoing mailbox, enter it in the « Reply-to address » field in the outgoing email section.

Outgoing

Optional user name:

Email address:

Password:

Reply-to address:

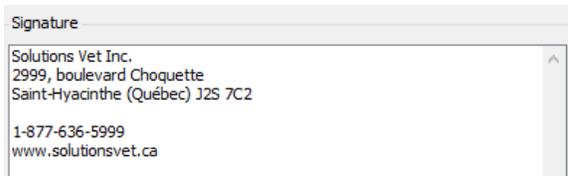
SMTP server:

Port #:

Enable SSL

3.1.3 Email signature

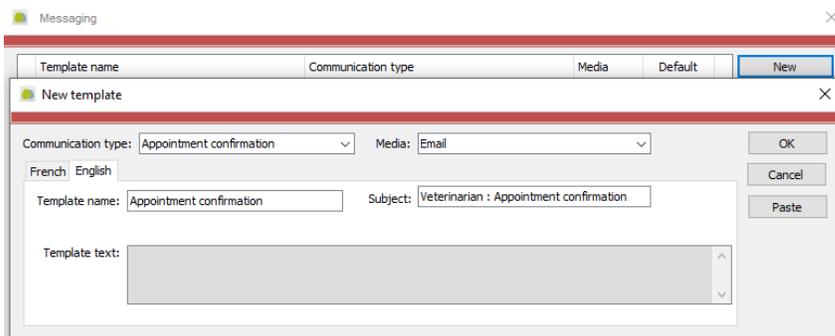
You can apply an automatic signature when sending all your « Freeform message » type emails. Note that it is not possible to add a logo to the signature.



3.2 Email template

3.2.1 Email template management

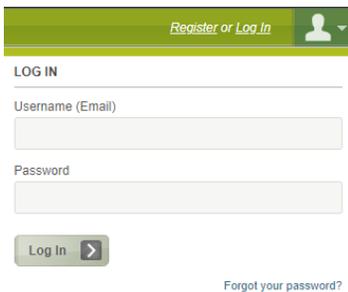
Under « Configuration » > « Messaging », add a new template.



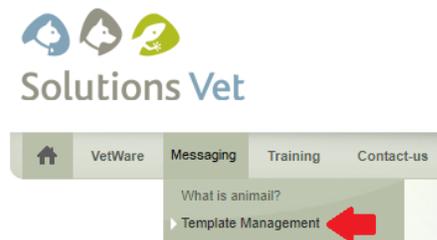
Please note that the « Freeform message » communication type can be used with the « Email » media starting with the version 5.10 only.

Login to solutionsvet.ca website.

Since the templates will be saved on the logged-in user, we suggest that you use the clinic's email address, not an employee's.



Once connected, go to « Messaging » > « Template Management »



Click on « Add a template

Template Management



Or modify an existing template

Template name	Lg	Template Type	Creation Date	Modification Date	Actions
Appointment confirmation	en	Appointment confirmations	2019-06-18 09:50:20	2022-08-25 10:28:24	  Edit

Step #1 select a template type and language

Step 1: Choose the template type *

Visit and vaccination reminder

- Visit and vaccination reminder
- Appointment confirmations
- Parasiticide Reminder
- Customized message

Language *

French English

The « Visit and vaccination reminder », « Appointment confirmations » and « Parasiticide Reminder » template types cannot be modified.

Please note that the « Customized message » template type allows you to write the text you want.

Your message (max 2000 characters)

Step #2 Clinic contact information

Step 2: Add your establishment coordinates - address and phone (if not included in the logo)

Automatic entry
 Manual entry

By selecting « Automatic entry », the contact information for your establishment that currently appears on your invoices will be used.

Make sure that your coordinates (address, postal code and phone number) are correct in your VetWare software (Identification #: 1), because these coordinates will be used by the Google geolocation function.



[Find our clinic with Google Maps](#)

Solutions Vet Inc. test 5.10
 2999 boul. Choquette, CP 608
 St-Hyacinthe, QC J2S 7C2
 (877)636-5999

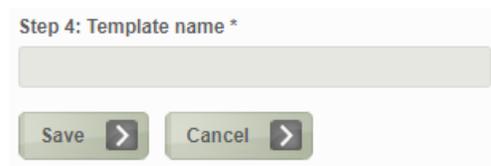
The « Manual entry » function is very useful if you want to enter the coordinates of a branch other than the one where you are at the time you are editing your template. Simply enter the full address and phone number in the text box.

Step #3 (Optional) Uploading the logo



It is important to respect the dimensions for the logo size: 510 x 130 pixels.

Step #4 Template name



Enter the name of your template and save it.

Click on « See the result » to have a preview of your template.



3.2.2 Exporting the template to VetWare

You will need to export your email template to VetWare once it has been saved on solutionsvet.ca

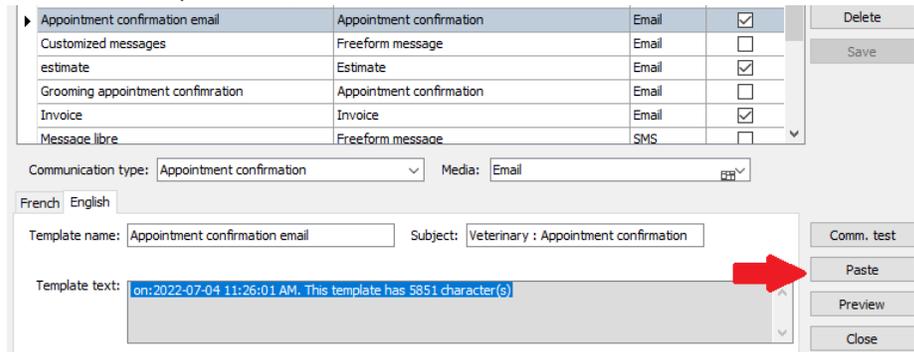
To do this, click on « See HTML code », then « Select code ».
Then, right-click in the HTML code rectangle and select « Copy ».



In VetWare go to « Configuration » > « Messaging ».

Select the template that needs be configured.

Select the template text, then click « Paste »



Once you have pasted the HTML code, save your template.



Do the same with your French HTML code.

Since the software requires a template in both languages, make sure you have a template under both the French and English tabs.

*Note : If your customers is only English-speaking, and you do not want to create a French template, paste the HTML code of your English template under the « French » tab.

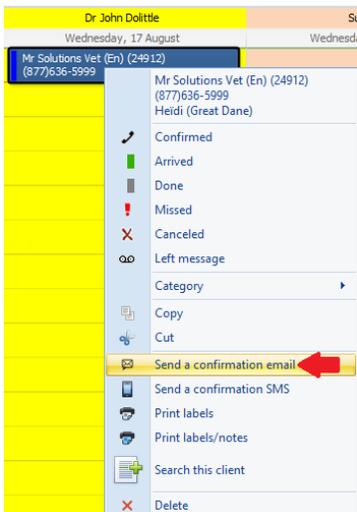
3.3 Sending email

3.3.1 Appointment confirmation

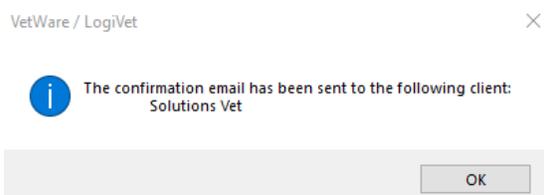
Only « Appointment confirmation » type templates can be sent.

Template name	Communication type	Media	Default
Appointment confirmation email	Appointment confirmation	Email	<input checked="" type="checkbox"/>

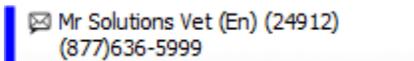
In the context menu of the appointment select « Send a confirmation email ».



Once sent, a message will confirm the sending of the email.

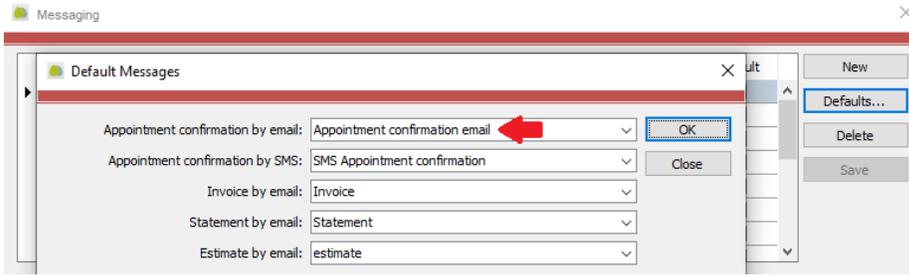


Once the email is sent (if the client has an email address on file), an icon will appear on the left side of the appointment .



In order to send an appointment confirmation by email, you must first create your template.

Under the « Configuration » > « Messaging », make sure you have a default template selected for sending appointment confirmation by email.



When the client confirm that he will be attending to his appointment, add the status « Confirm » to it.



Note that you can also use your templates for batch confirmation. It is suggested that you do not activate the « Confirm appointments after send » function.



3.3.2 Reminder(s)

Only the « Reminder » templates type can be sent.

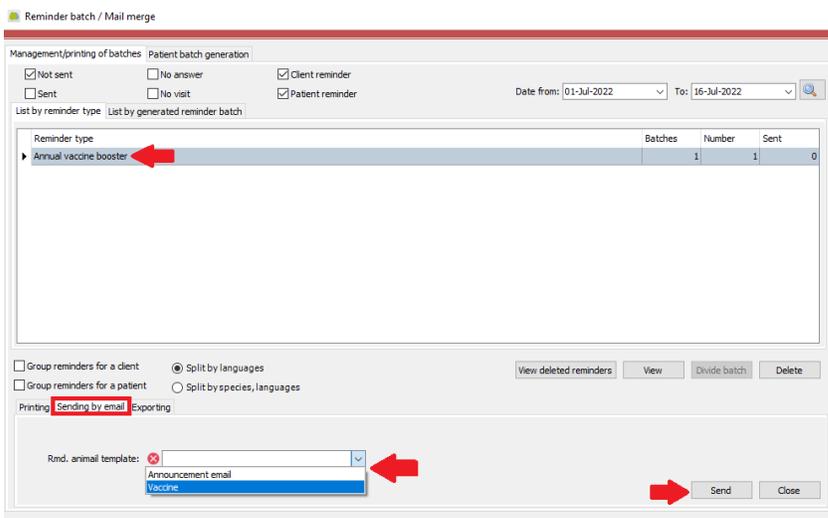
Template name	Communication type	Media	Default
Vaccine	Reminder	Email	<input type="checkbox"/>

Go to « Function » > « Reminder batches »

Select a batch to sent

Under « Sending by email », select your template

Then click « Send »



Once the reminders are sent, they will be marked as « Done » in the client's file.

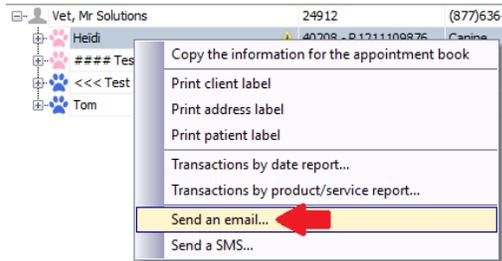
To follow up on your reminders, refer to section 3.2 of the training module #2.

3.3.3 Freeform message

Only the « Freeform message » templates type can be sent.

Template name	Communication type	Media	Default
Prescription	Freeform message	Email	<input type="checkbox"/>

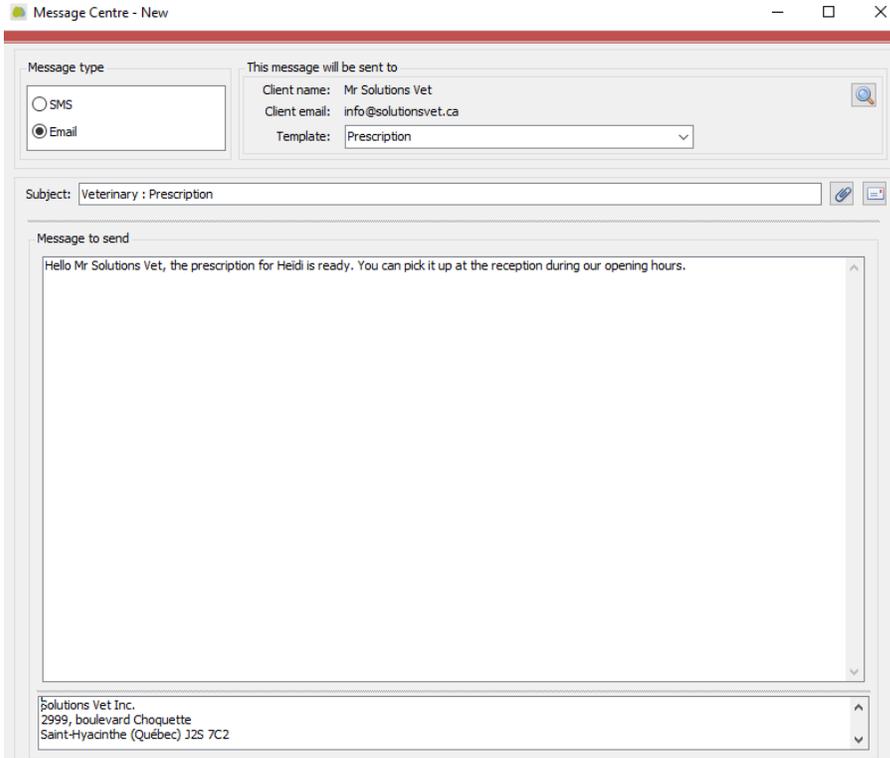
On the client or animal, select « Send an email » in the context menu.



Select your template. Note that the template selection is not mandatory, you can write your own message.

You can also add an attachment to your email with the icon 

When you are ready, click on the icon  to send the email.

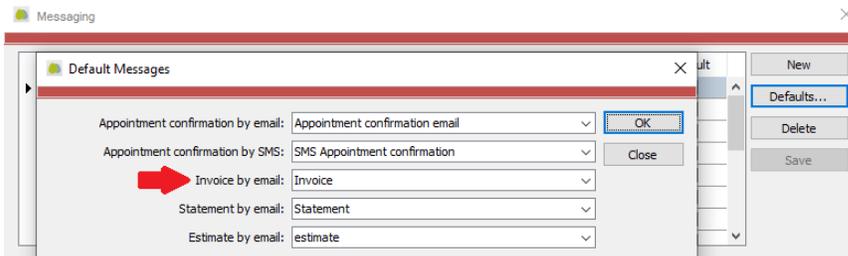


3.3.4 Invoice

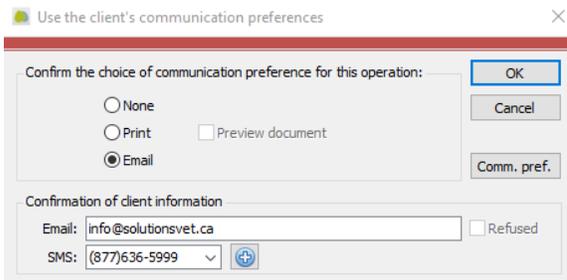
Only the « Invoice » templates type can be sent.

Template name	Communication type	Media	Default
Invoice	Invoice	Email	<input checked="" type="checkbox"/>

Under the « Configuration » > « Messaging », make sure you have a default template selected for sending invoice by email.



When paying or printing an invoice, a window will appear. You will be able to make a selection for sending the invoice.

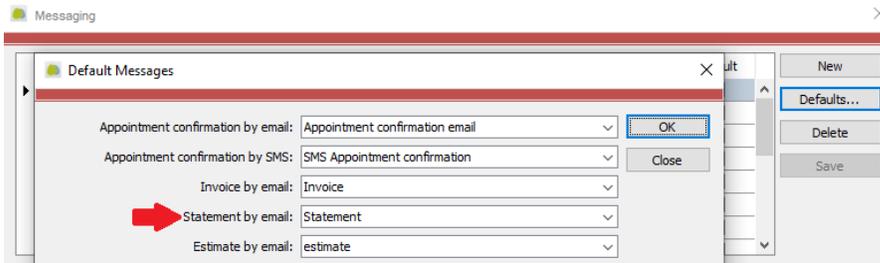


3.3.5 Statement

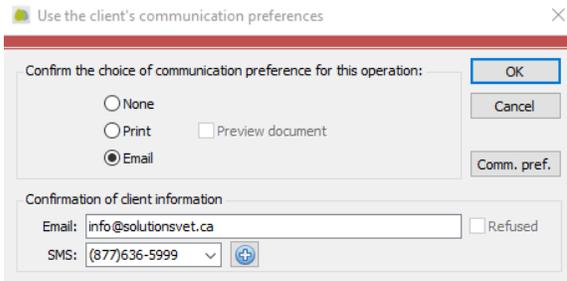
Only the « Statement » templates type can be sent.

Template name	Communication type	Media	Default
Statement	Statement	Email	<input checked="" type="checkbox"/>

Under the « Configuration » > « Messaging », make sure you have a default template selected for sending statement by email.



When sending a statement, a window will appear. You will be able to make a selection for sending the statement.

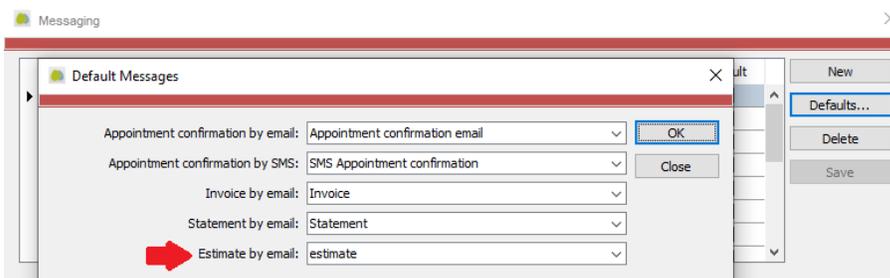


3.3.6 Estimate

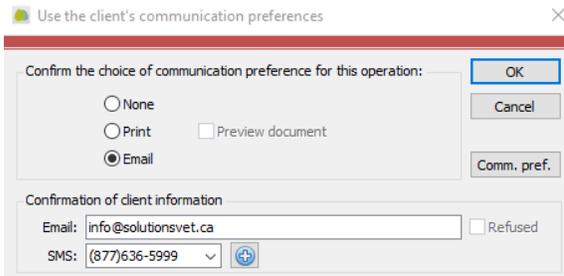
Only the « Statement » templates type can be sent.

Template name	Communication type	Media	Default
Estimate	Estimate	Email	<input checked="" type="checkbox"/>

Under the « Configuration » > « Messaging », make sure you have a default template selected for sending estimate by email.

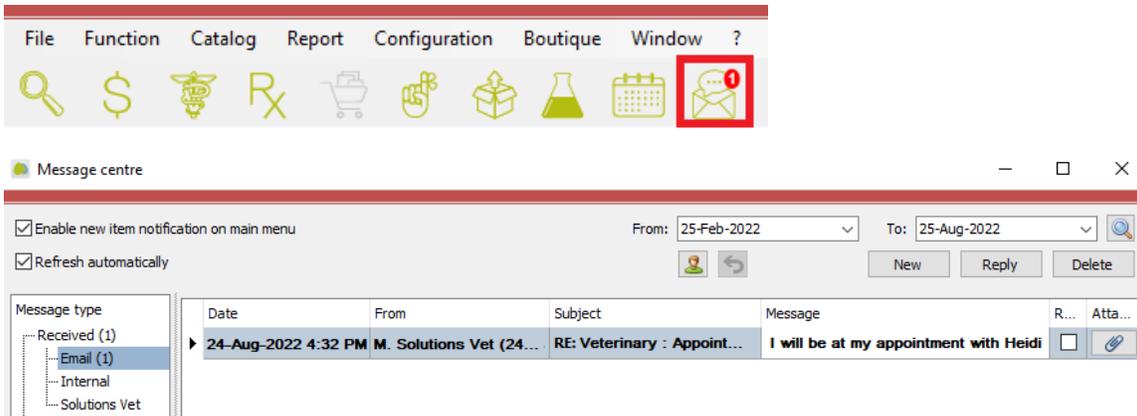


When sending an estimate, a window will appear.
You will be able to make a selection for sending the estimate.



3.4 Incoming email

If you have configured incoming emails (see section 2.1.2) they will be received in your message centre.



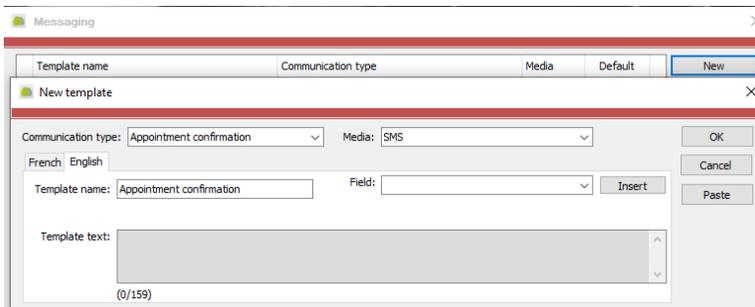
4. SMS (text message)

4.1 Subscription

You must be subscribed to the two-way messaging (SMS) via VetWare in order to use this function. Three packages are available and include sending and receiving text message (SMS) in Canada as well as a dedicated number for your establishment. Contact one of our support agents to obtain more details and the subscription form.

4.2 SMS (text message) template management

Under « Configuration » » « Messaging », add a new template. Select the communication type and media « SMS », the name of your template, then save.



Please note that only the « Appointment confirmation » and « Freeform message » can be used with the « SMS » media.

To enter the text, select your SMS template from the list of your templates and enter your text in « Template text » field. Note that there are 4 fields available for you to insert in your text.

Communication type: Appointment confirmation Media: SMS

French English

Template name: Appointment confirmation SMS Field: {%ApptTime24%} Insert

Comm. test

Paste

Preview

Close

Template text: Dear {%FullName%}, This message is to confirm {%AnimalName%}'s appointment on {%ApptDate%} at {%ApptTime24%}. To confirm, please call at 1-877-636-5999

(151/159)

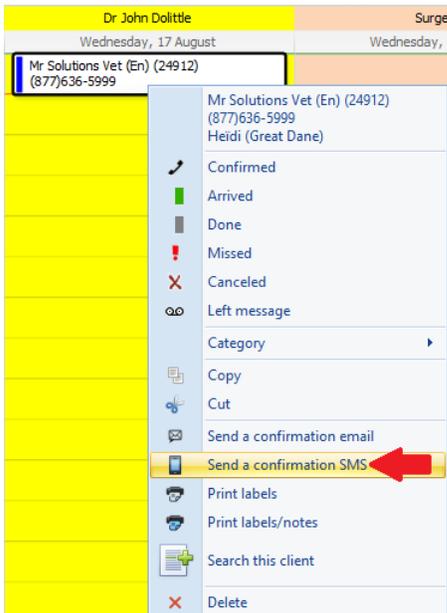
4.3 Sending SMS (text message)

4.3.1 Appointment confirmation

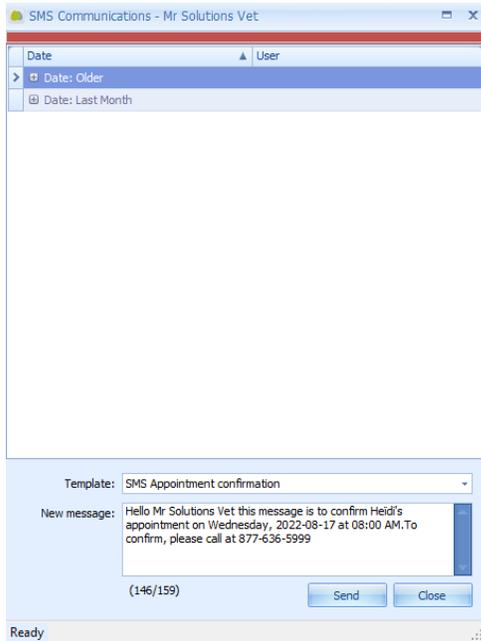
Only « Appointment confirmation » templates type can be sent.

Template name	Communication type	Media	Default
SMS Appointment confirmation	Appointment confirmation	SMS	<input checked="" type="checkbox"/>

In the context menu of the appointment select « Send a confirmation SMS »



Select your template and modify the message text as needed, then click on « Send »



Once sent, a message will confirm the sending of the SMS.

VetWare / LogiVet

 The message was sent.

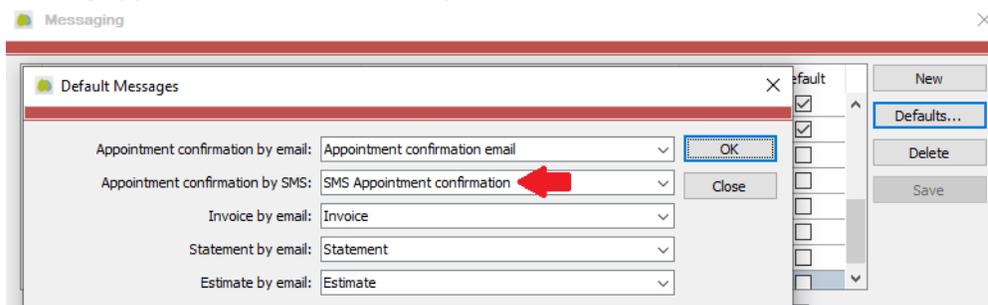
OK

Once the SMS has been sent (if the client has an « SMS » cell phone in his file), an icon  will appear on the left side of the appointment.



In order to send an appointment confirmation by SMS, you must first create your template.

Under the « Configuration » > « Messaging » tab, make sur you have a default template for sending appointment confirmation by SMS



When the client confirms that they will be attending to their appointment, add the status « Confirmed » to it.



Note that you can also use your templates for batch confirmation. It is suggested that you do not activate the « Confirm appointments after send » function.

Batch appointment confirmation

From: Wednesday, August 31 2022 Include confirmed appointments Confirm appointments after send

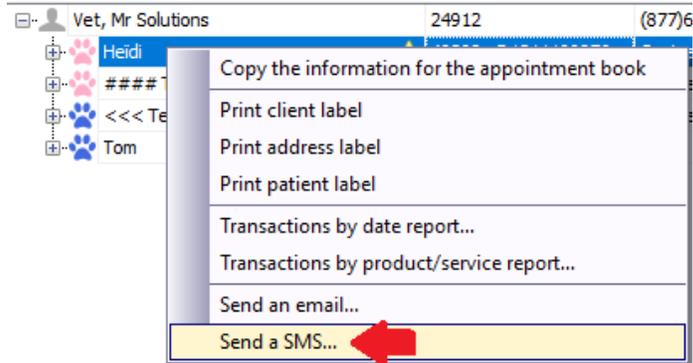
To: Wednesday, August 31 2022 Include confirmable appointments only

4.3.2 Freeform message

Only « Freeform message » templates type can be sent.

Template name	Communication type	Media	Default
Prescription	Freeform message	SMS	<input type="checkbox"/>

On the client or animal, select « Send a SMS » from the context menu.



Select your template, if necessary. Note that the template selection is not mandatory, you can write your own message.

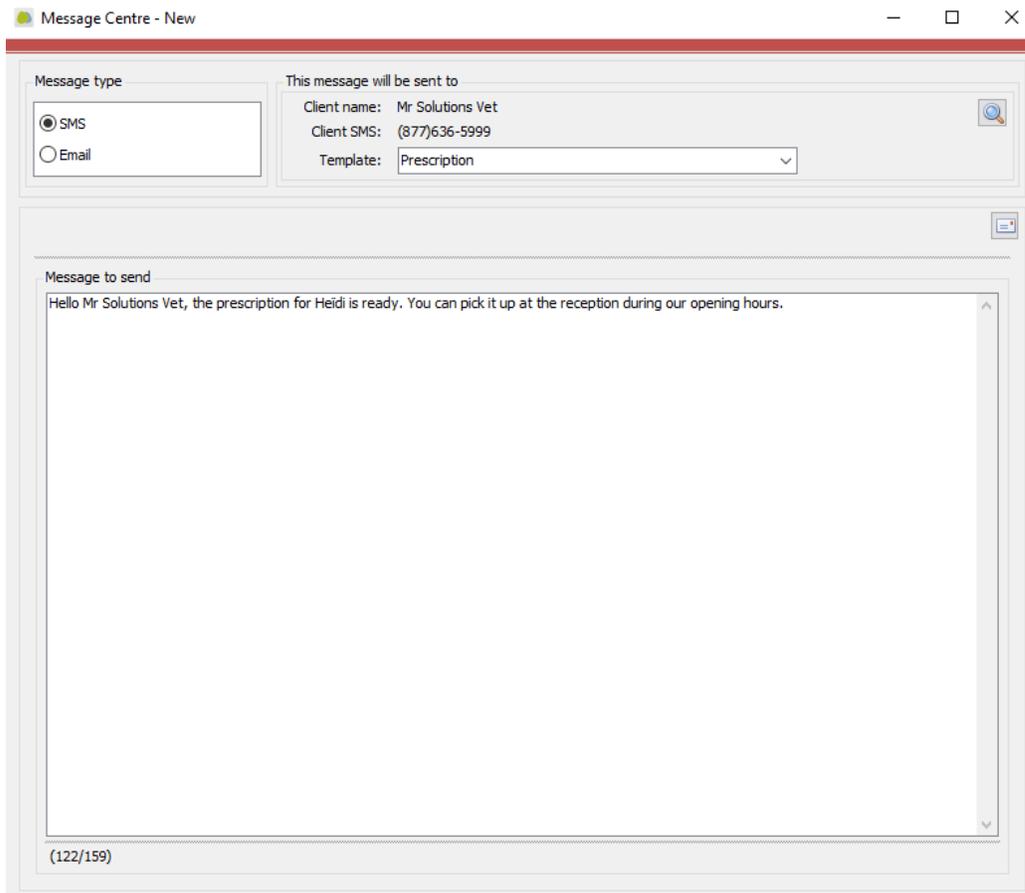
This message will be sent to

Client name: Mr Solutions Vet
 Client SMS: (877)636-5999

Template: Prescription

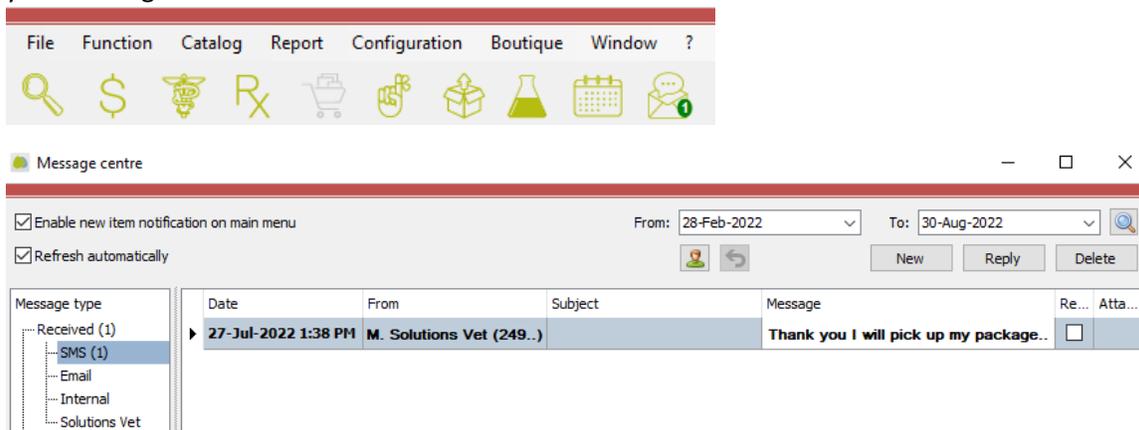
<N/A>
 order
 Prescription

When you are ready, click on the icon  to send the SMS.



4.4 Receiving SMS (text message)

Since the SMS number used is dedicated to your clinic, your client's responses will be sent to your message centre.



5. Internal message

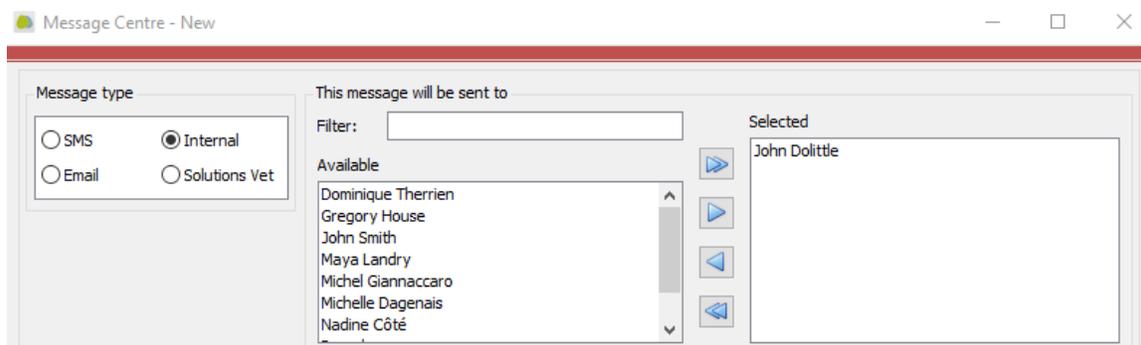
You can send a message to a colleague or group of colleagues via internal communications. This user will receive your message and a notification will appear in their menu bar in few seconds or the next time they log in. They will then be able to reply to you.

5.1 Sending internal message

To send a message to a colleague, open the message centre and click « New ».

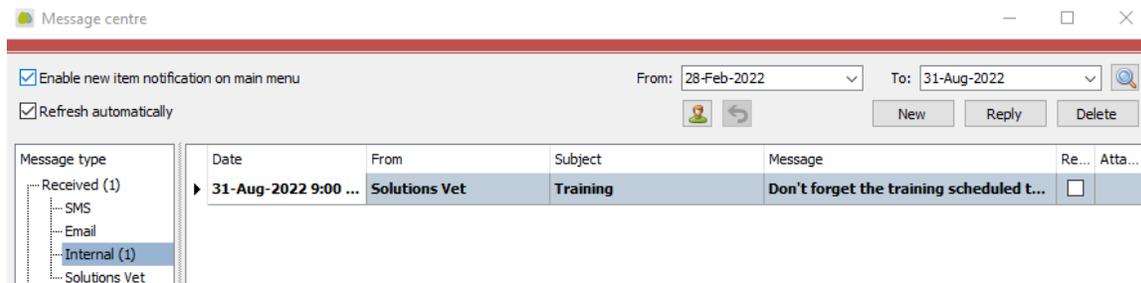


Select the « Internal » message type and the person(s) you wish to send a message to.



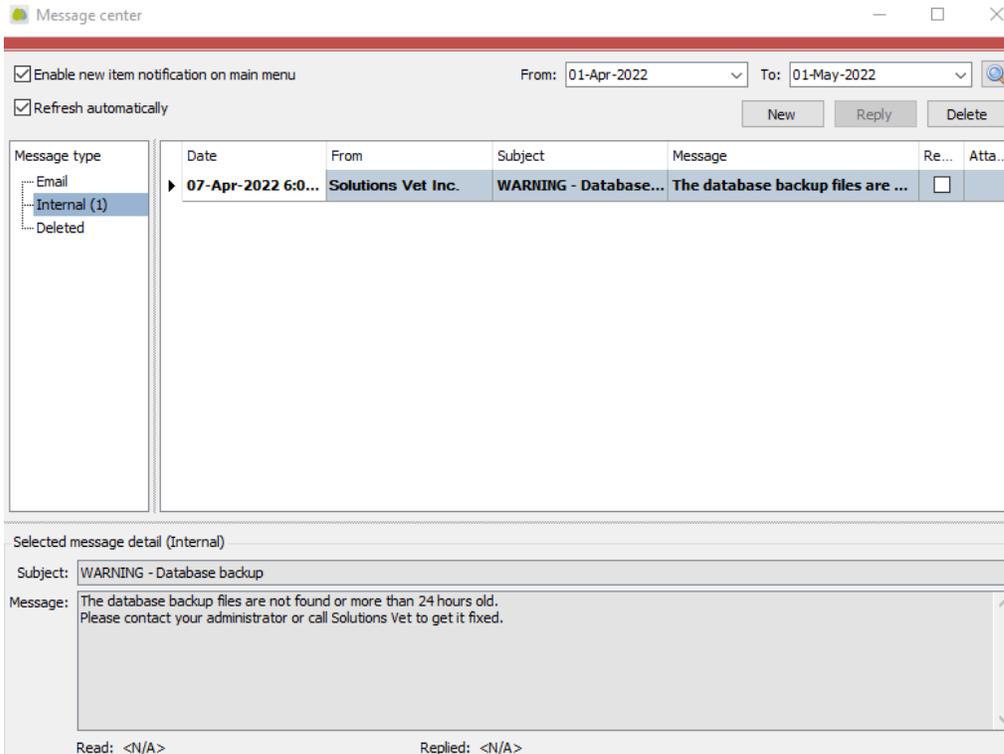
5.2 Receiving internal message

Only the person selected when sending an internal message will receive a notification.



5.2.1 Data backup

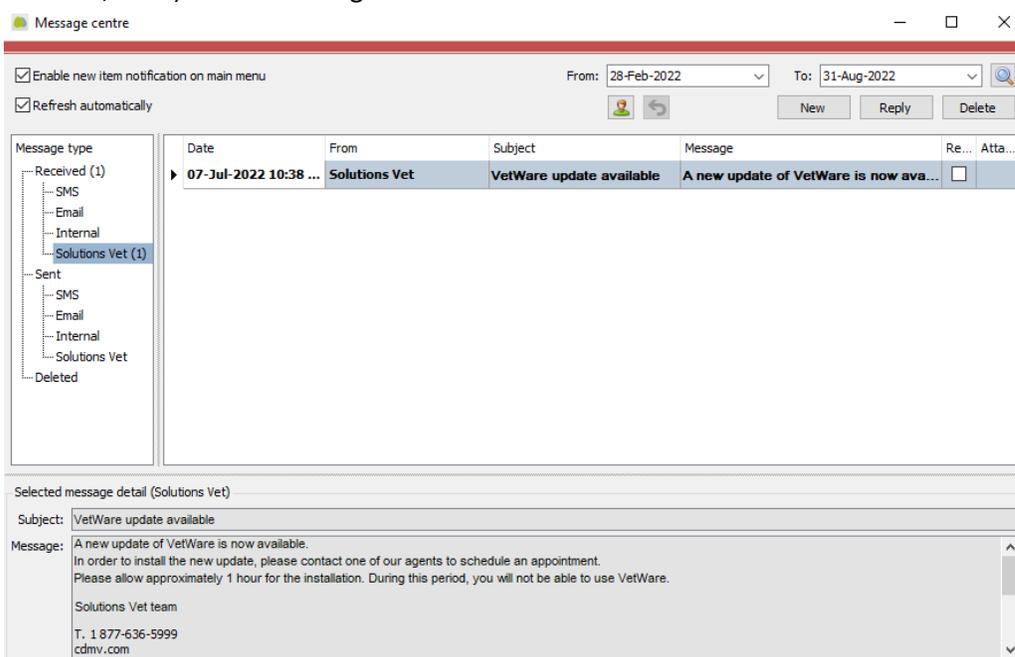
In the internal message section, you may also see a message indicating that your backup files are missing or saved more than 24 hours ago. It is then important to contact us without delay to verify your backup configurations.



Please note that Solutions Vet does not have a copy of your databases backup, so it is your responsibility to make sure you have a copy outside the clinic. For more details on this function, contact us.

6. Solutions Vet communication

The Solutions Vet team can also send you messages (updates available, information on new features, etc...) via the message centre.

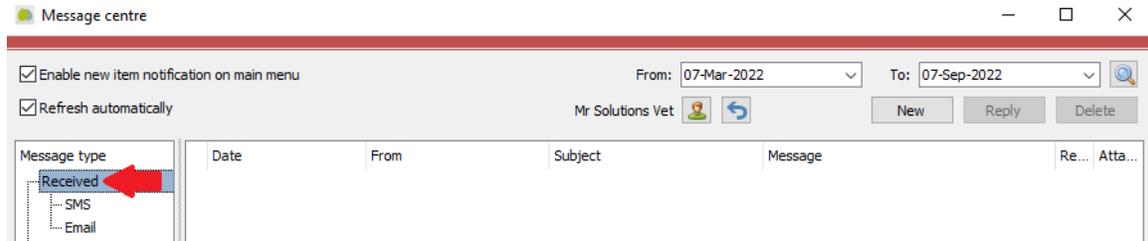


7. Communication log

By viewing your client's communication log.



You will be able to see the messages you have received from your client.



Messages that the clinic has sent to the client will also be displayed.

