



Academy SOLUTIONS VET

Module 9 – Configuration

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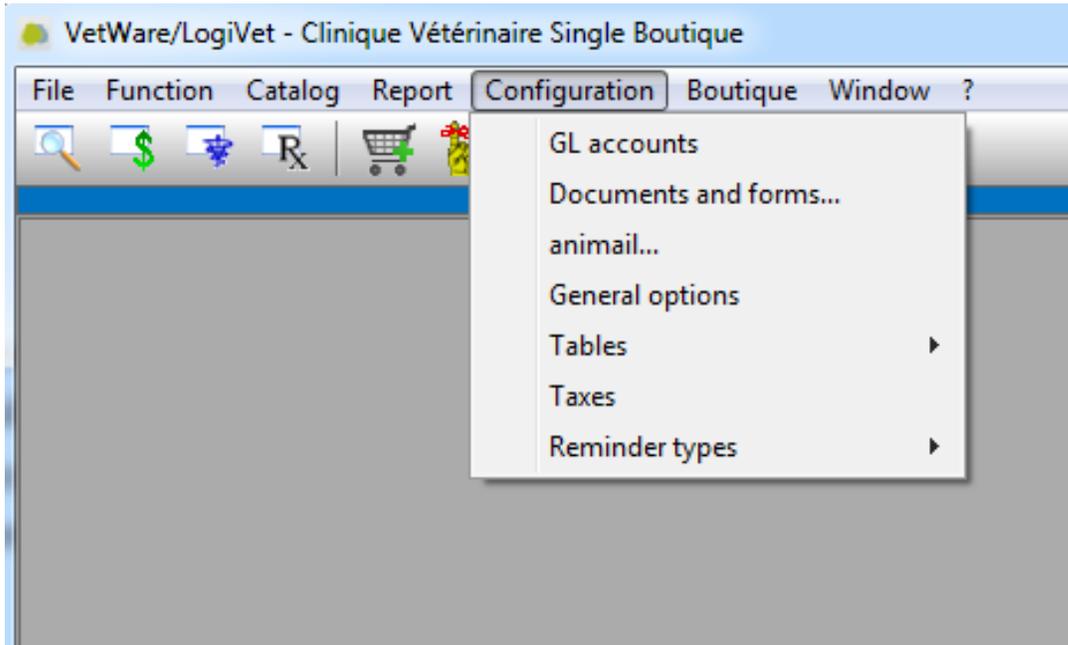
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**** IMPORTANT NOTICE ****

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

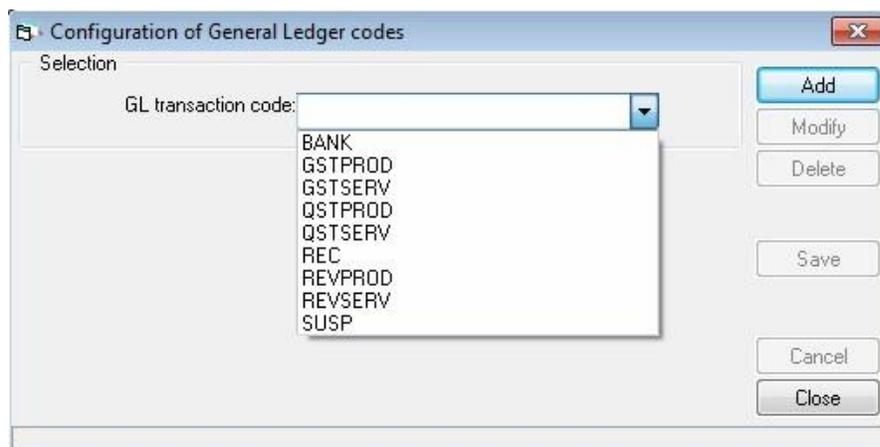
The Solutions Vet Academy regularly updates its modules; however, the software is in continuous development.

Your system has many customizable settings located in the main toolbar under “**Configuration...**”, allowing you to modify your software to suit the requirements of your clinic. Some setting modifications require that you restart the software on all computers in order to take effect.



1. GL Accounts

This is where you will setup your General Ledger groups and accounting codes. Please refer to **Module 3 - Catalog** for more details.

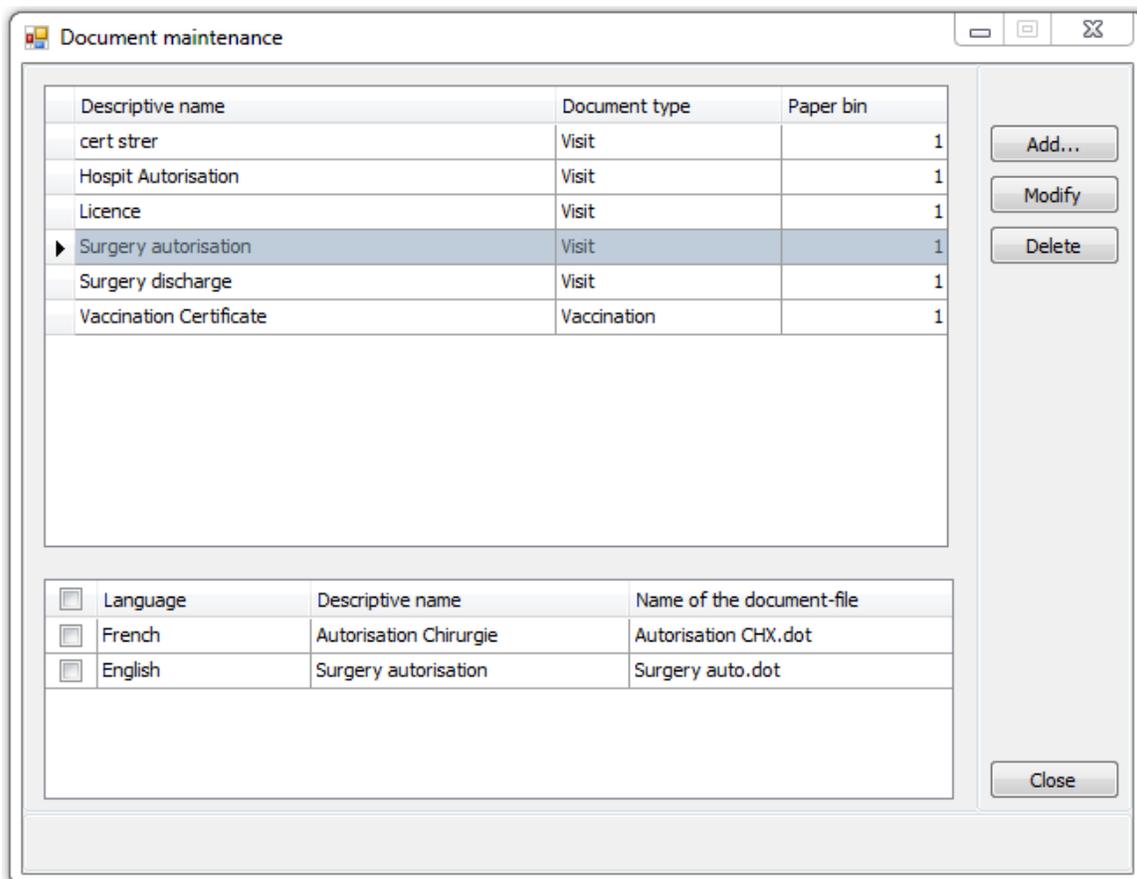


2. Documents and forms

From the Document maintenance window, you define the various Word documents you wish to use.

This will include reminder letters, postcards, authorization documents, custom labels, etc.

Please refer to **Module 7 – Managing your Word Documents** for more details.



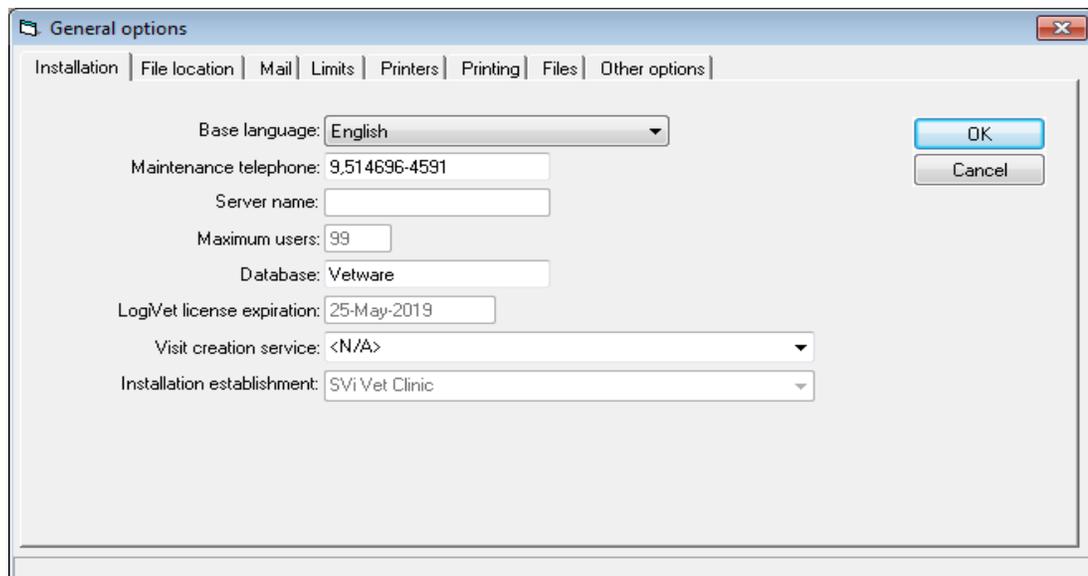
3. General options

3.1 Installation tab

Our technicians will configure these settings upon installation of the software. Typically, the clinic would not make any change here.

In the Visit creation service option window, you can define a certain service that will automatically be added to each new visit.

** You must click on the drop-down arrow and hold it to make your selection from the list of services.*



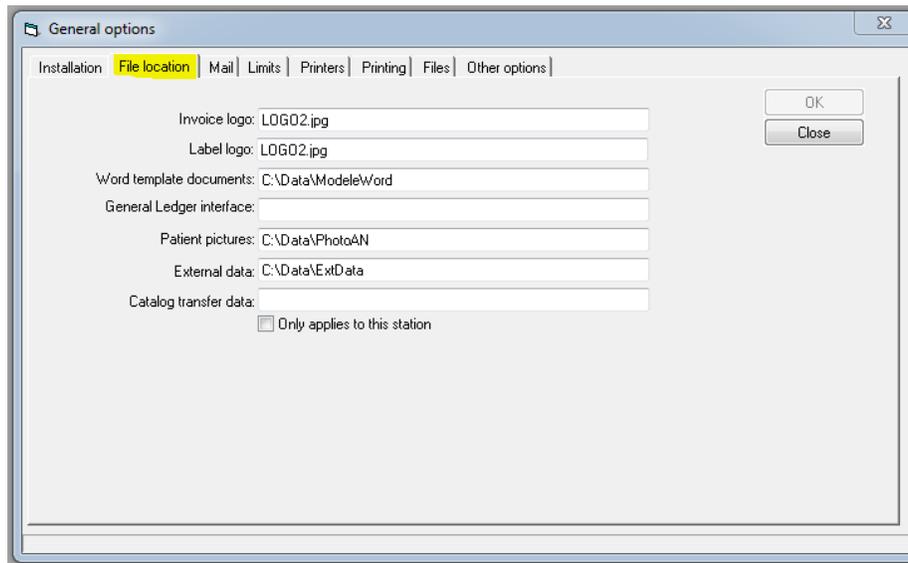
The screenshot shows a dialog box titled "General options" with a close button in the top right corner. The "Installation" tab is selected, and the following settings are visible:

- Base language: English (dropdown menu)
- Maintenance telephone: 9,514696-4591 (text field)
- Server name: (empty text field)
- Maximum users: 99 (text field)
- Database: Vetware (text field)
- LogiVet license expiration: 25-May-2019 (text field)
- Visit creation service: <N/A> (dropdown menu)
- Installation establishment: SVi Vet Clinic (dropdown menu)

Buttons for "OK" and "Cancel" are located on the right side of the dialog box.

3.2 File location tab

Under the “Configuration” menu, select “General options” and then the “File location” tab. In this window, you define where external data files are stored. These directories are automatically backed up.



- Invoice and Label logo: Name of the file only. (The system assumes logo files are located in the “Word template documents” directory.)
- Word template documents: Location of your document templates and forms. Indicate the full path name (i.e. \\servername\data\MODELEWORD, etc.).
- General Ledger interface: No longer used.
- Patient pictures*: Location of animal pictures. Indicate the full path name (i.e. \\servername\data\PATTON, etc.).
- External data*: Location of attachments. (i.e. X-rays, lab results, etc.). Indicate the full path name (i.e. \\servername\data\EXTDATA, etc.).
- Catalog transfer data: For multiple clinics maintaining identical catalogs – indicate full path info for catalog synchronization files.

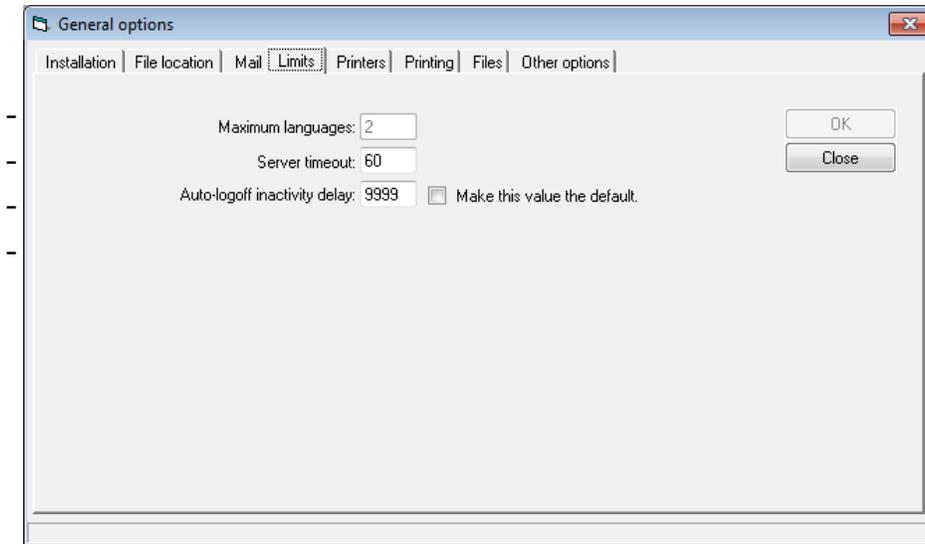
**The software does not store attachments or animal pictures in the database. Instead we store the information of their path. When linking a file to your software, we create a copy of the original file and store it in the defined directory. The original file can thus be located anywhere on your*

computer and deleted once it has been linked, because we create a copy of the file in the defined folder, on your server.

3.3 Mail tab

See Module 11: New Features- version 4.3

3.4 Limits tab



Maximum languages: Currently, the software supports 2 languages.

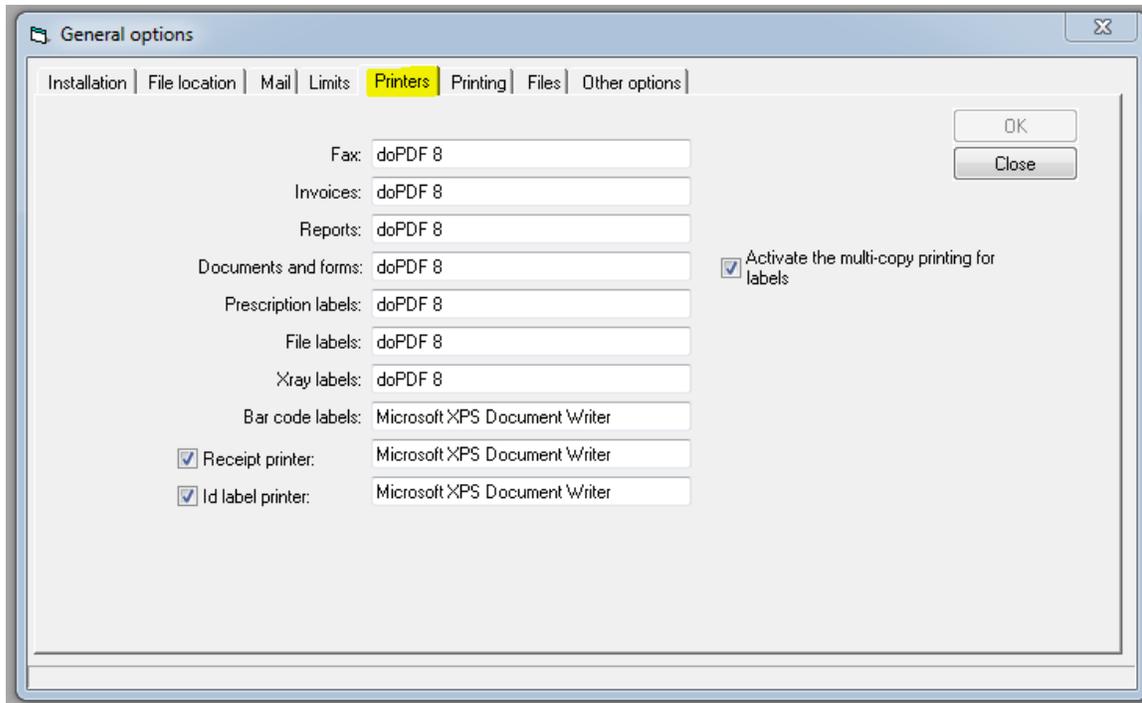
Server timeout: The number of seconds a query can run before it expires. The recommended setting is 60 and should not be changed, unless advised by a Solutions Vet technician.

Auto-logoff inactivity delay: When the software is idle on a workstation for this number of seconds, it will force the F12 login prompt, thus locking down the system until the user reenters their credentials.

This particular option only has an effect on the local workstation, unless the user checks **"Make this value the default", in which case the logoff setting will be applied globally to all computers.*

3.5 Printers tab

**This configuration must be applied to every workstation.*

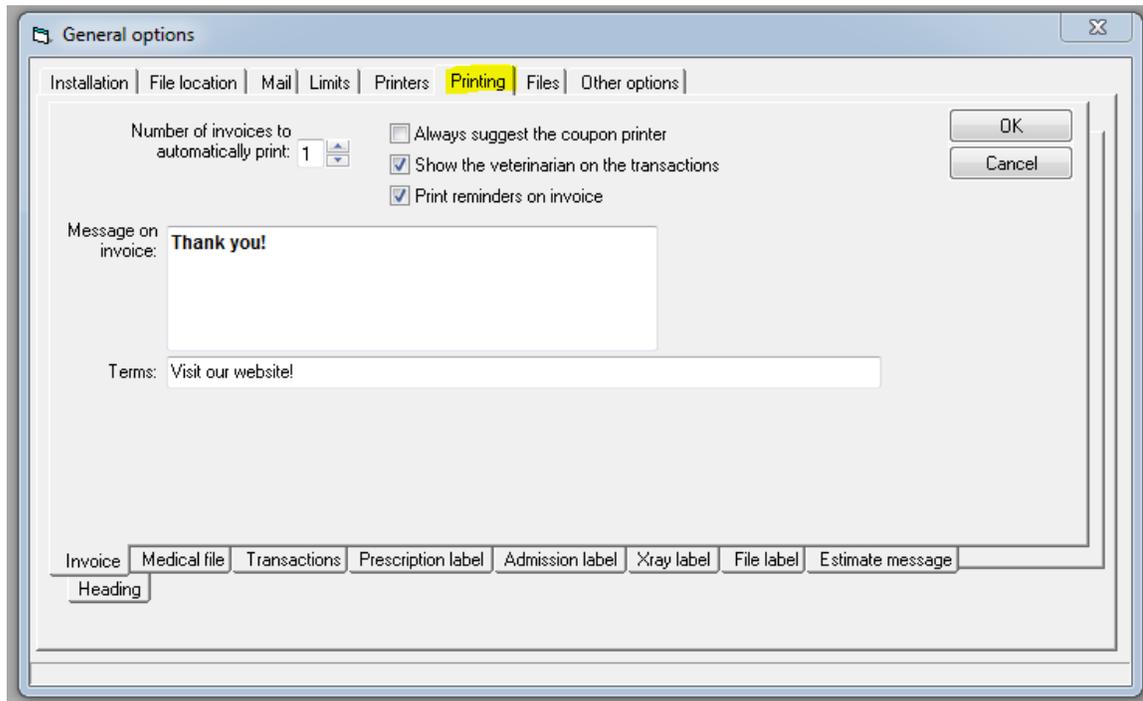


This tab allows you to define the name of printers you wish to use for various reports and labels.

If your clinic has a receipt printer and/or an ID label printer, they are activated and defined on this screen.

Note: The option "Activate the multi-copy printing for labels" is no longer used.

3.6 Printing tab



The Printing tab allows you to configure various printing options for different reports and labels:

Invoice:

- Number of copies you wish to automatically print: indicate a quantity
- Always suggest the coupon printer: Will offer the receipt printer for all invoices. If there is no checkmark in this box, the system will automatically offer the coupon printer when an invoice contains only products (i.e. no services).
- Message on invoice: This text will appear on each invoice to the left of the taxes and payment information.
- Terms: This line prints at the bottom of all invoices and is useful to indicate monthly fees (the interests) charged, for example.

Medical file:

- Option to print the referrer information on the medical file report (referring clinic and veterinarian).

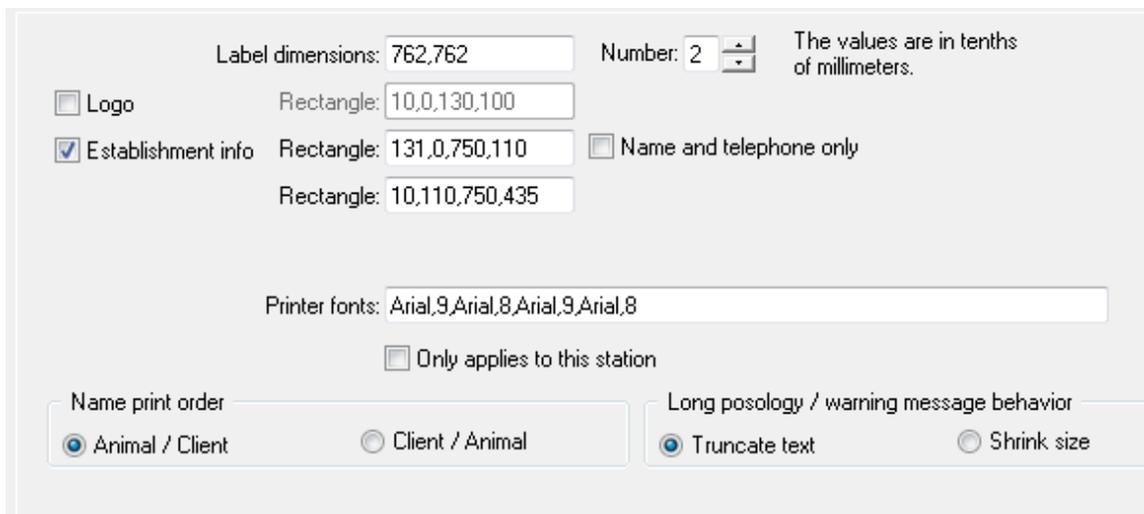
Transactions: This is the report that prints from “Account” and “Print transactions”.

- Title: The user can define the name of the report, i.e. Treatment Summary. This title will appear at the top of the report.
- Note: This line prints directly below the report title. We suggest: “This is not an invoice”.

Labels: (Prescription, Admission, X-ray and File). In these tabs, you can define the parameters of the various labels. **Note that the “Label dimension” function is no longer used; previously, it defined the height and the width of the label.*

** The label settings can be applied to an entire clinic or to individual workstations.*

- Number: Number of label copies you wish to automatically print.
- Logo: Select this option if you wish to print your logo on the label.
- Establishment info: Select this option if you wish to print your clinic info on the label. ** For prescription and file labels, you can select to print only the name and phone number.*
- Rectangle: This information defines the “x/y” coordinates where you want the information to print.



Label dimensions: 762,762 Number: 2 The values are in tenths of millimeters.

Logo Rectangle: 10,0,130,100

Establishment info Rectangle: 131,0,750,110 Name and telephone only

Rectangle: 10,110,750,435

Printer fonts: Arial,9,Arial,8,Arial,9,Arial,8

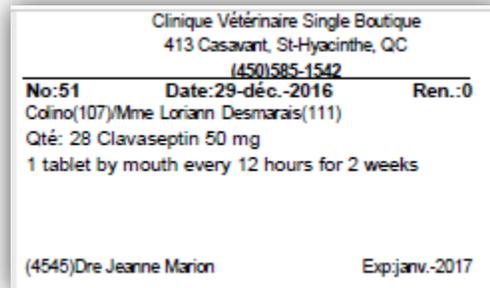
Only applies to this station

Name print order: Animal / Client Client / Animal

Long posology / warning message behavior: Truncate text Shrink size

** If the system generates a second label, a blank one, adjust the “x” value (for Dymo printer, reduce the width). * The system may not use the 0,0 values; try 5.5 for the top left-hand corner if some data does not print.*

- **Printer fonts:** Here is where you indicate the font type and size. The second setting controls the clinic phone number and dispensing instructions. The third setting controls the rest of the prescription text. Use the following format : Font type, Font size, Font type, Font size, Font type, Font size, etc.

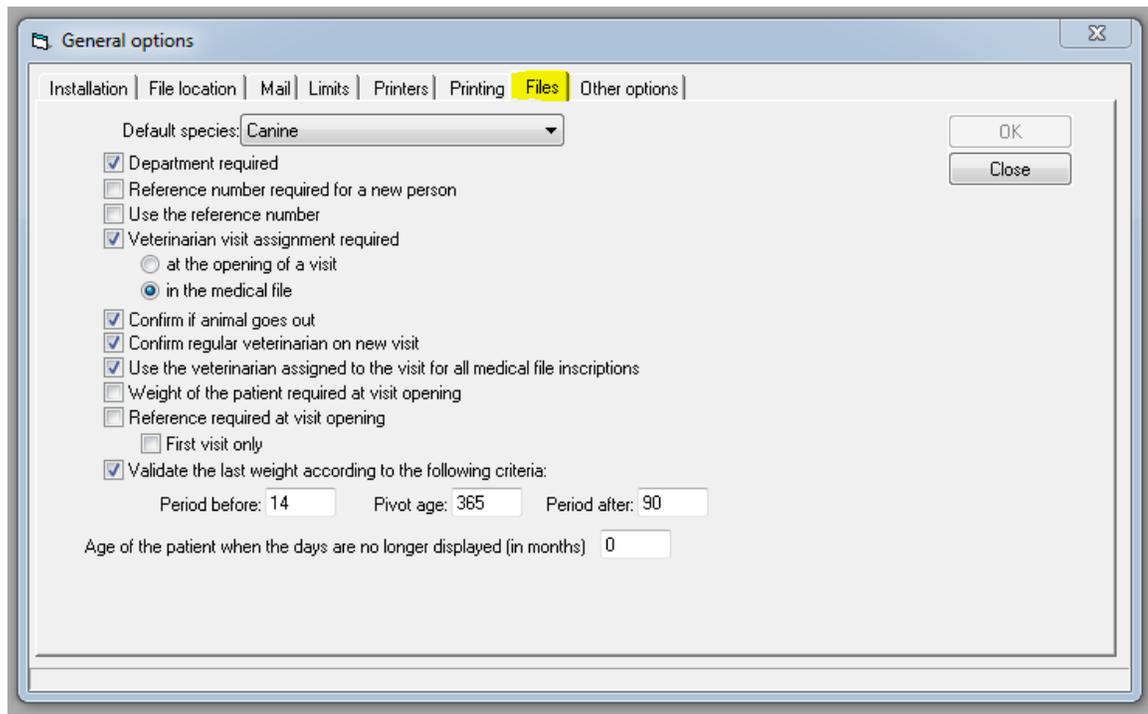


Estimate message: Default text displayed at the bottom of an estimate. It can be modified upon creation of the estimate.

Heading: This option customizes what clinic information you wish to print on invoices, estimates, account and non-invoiced transaction reports, as well as the desired logo size.

3.7 Files tab

This is where you can customize your settings and requirements for new files (clients, animals and visits):



Default species: When a new animal is added, the system will auto-fill the species.

Department required: If this option is selected, users must assign a department when opening a new visit.

Reference number required for new person: If this option is selected, users must add a reference number to all new customer accounts.

Use the reference number: If this option is selected, the client's reference number will be displayed on the search screen.

Veterinarian visit assignment required: Indicates that a veterinarian must be assigned to a visit in order for users to be able to enter data in the medical file. If this option is selected, you have 2 options:

- At the opening of a visit: A veterinarian must be assigned upon creation of the visit.

OR

- In the medical file: A veterinarian must be assigned before items can be added to the medical file.

Confirm regular veterinarian on new visit: If this option is selected, the system forces users to assign a regular veterinarian to an animal when a new visit is initiated.

Use the veterinarian assigned to the visit for all medical file inscriptions: If this option is selected, all users can make changes to the medical file. If unselected, the user who is signed in the software must be a veterinarian in order to modify the Medical File.

Weight of the animal required at visit opening: The system forces the user to enter the animal's weight when a new visit is created.

Reference required at visit opening: Forces the user to enter a referral type when creating a new visit. If selected, will apply to every new visit unless the following option is checked.

First visit only: Referral type is only required for the animal's first visit.

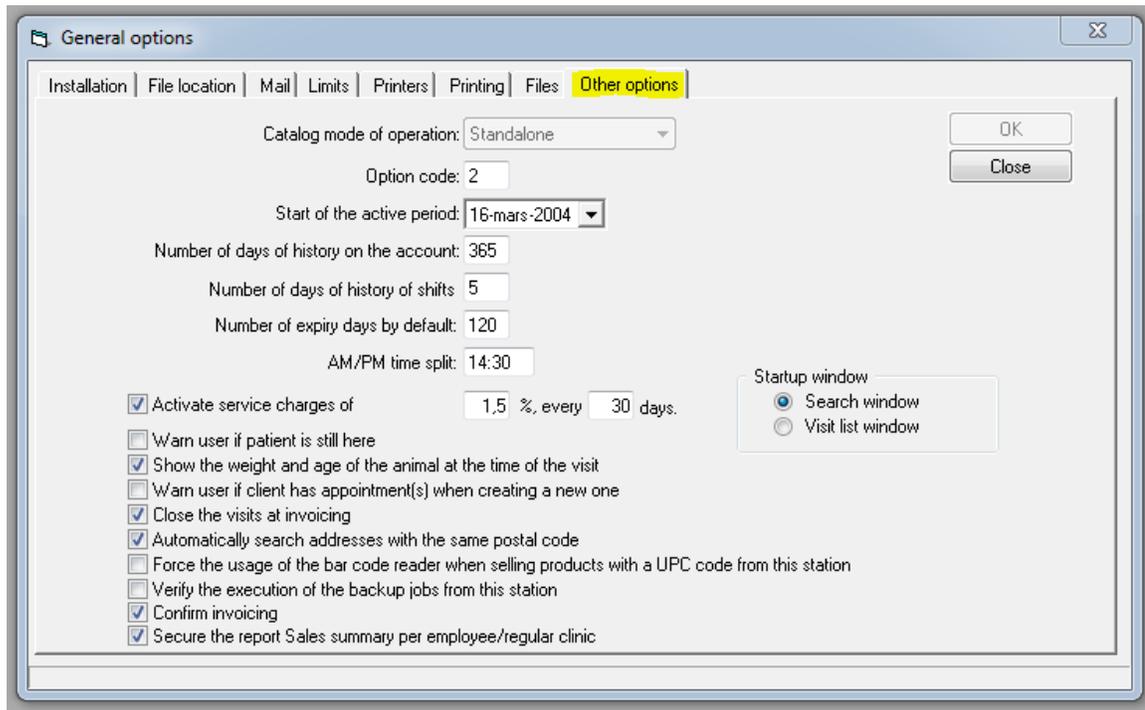
Validate the last weight according to the following criteria: If this option is selected, the system will notify the user, upon creation of a visit, that the animal should be weighed, based on the following criteria:

- Period before: The last recorded weight was entered more than ___ days ago.
- Pivot age: Enter number of days.
- Period after: The last recorded weight was entered more than ___ days ago.

If the animal is younger than this value, the system refers to the "Period before" value when determining whether or not to display the weight prompt.

If the animal is older than this value, the system refers to the "Period after" value when determining whether or not to display the weight prompt.

3.8 Other Options tab



Catalog mode of operation: This internal setting is configured by Solutions Vet and it defines the catalog mode as either master, satellite or stand-alone.

Option code: For internal use only, users should not change this setting.

Start of the active period: The clinic should update this setting at months end, after closing the month in their accounting software. The system will not allow any financial changes after this date (i.e. users cannot delete payments or add new financial data with an effective date prior to the “Start of active period” option). This ensures that the financial picture in the software remains unchanged and reconciled with your accounting software for prior months.

Number of days of history on the account: From the Client’s Account...

Print Statement... the system will print all invoices and payments that have occurred within the indicated number of days or since the last statement date (as defined in the Person screen), whichever period is shorter.

Number of days of history of shifts: Limits the list of closed cash drawers displayed in the “**Shifts**” tab of the “**Cash Drawer**” and “**Shifts**” management window.

Number of expiry days by default: This value is applied to prescriptions when no product expiration date has been defined.

AM/PM time split: Defines the time of day that separates your AM and PM shifts, as used by the sales report “Sales summary by employees/category/AM/PM”.

Close the visits at invoicing: When selected, all visits are set to “Closed” once they are invoiced. Deselecting this option allows the veterinarian to review the visit list, review all of their cases of the day and complete their notes and then manually close the files.

*Users can override this setting manually for individual invoices under **Options** (in the Account screen).

Automatically search addresses with the same postal code: When selected, the system will display a list of addresses matching the postal code you are entering for a new account. You can then select the address and either copy or share it with the new account. Whether this option is selected or not, the system will still suggest cities as you enter the postal code.

Force the usage of bar code reader when selling products with a UPC code from this station*

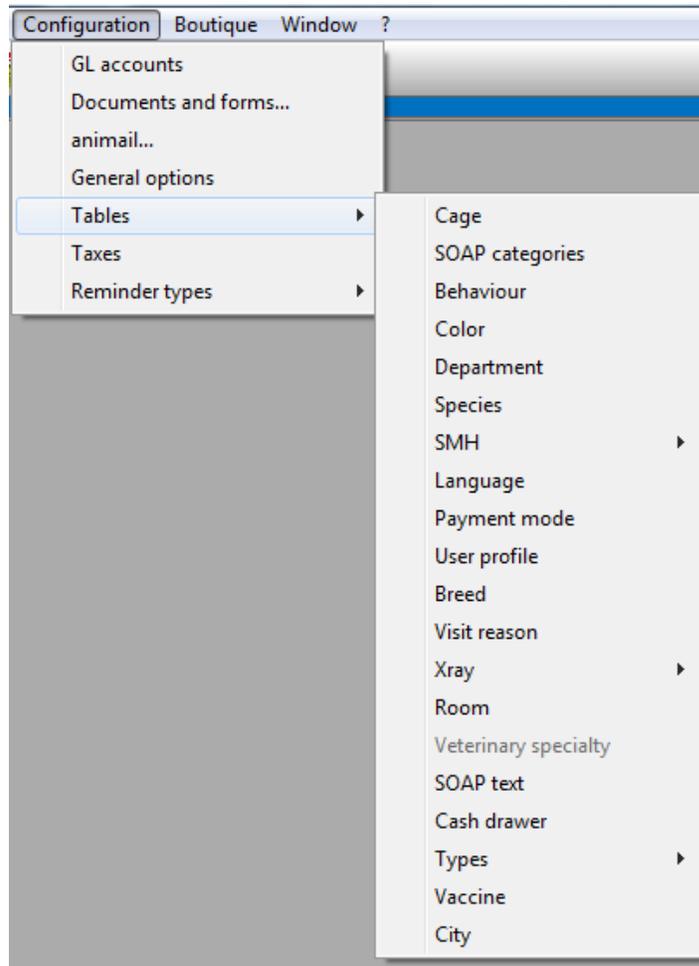
Verify the execution of the backup jobs from this station*: Notifies the user about the status of the last backup

Start-up window*: When the user opens the software, they can select either the Search window or the Visit list, as the default start-up window.

**These settings apply to the local workstation.*

Confirm invoicing: Displays the following message when the “Invoice” button is used: Do you really want to start invoicing?

4. Tables



This is where you can setup all the drop-down menus in your software, including:

Cage: Before defining your cages, you will need to configure Cage Types and Rooms. From the medical file, you can indicate in which cage the animal is located.

Behaviour: Defines the list of behaviours that will be available from the patient details screen.

Color: Defines the list of colors that will be available from the patient details screen.

Department: Patients can be assigned to a department from the “New Visit” or “Modify visit” form. “Departments” is an available filter available in the visit list.

Species: Defines the list of species that will be available from the Patient details screen.

SMH: (Significant Medical History). Health problem list that users need to configure. Ex.: Category: cardiac problem. Details: Murmur grade 1, murmur grade 2.

Language: (Not used).

Payment Mode: Defines the payment methods accepted by your clinic.

User profile: Configures the security profiles for your software.

** Please refer to “Module 1 – Overview - How to Log-In” for more information.*

Breed: Defines the list of breeds that will be available from the Patient details screen.

Visit reason: There is where you can set up the most common reasons for a visit, making them available for selection from the drop-down menu on the New Visit screen.

X-ray: Defines the various parameters for kVp, mAs, mA, Time, Projection, Region and Quality, which will be available from the drop-down menus on the X-ray document (when using a service defined as “X-ray” in the medical file).

Room: Before defining your rooms, you will need to configure Room Types. “Rooms” is a filter available in the visit list.

Veterinary specialty: (not used).

SOAP text: (not available at the present time).

Cash Drawer: Setup the name(s) of the cash drawer(s) for your clinic.

Types:

-Cage type: Used to categorize cages.

-Referral type: This list is available on the New Visit screen, under the Referrer tab. Your software can generate statistical reports to show you how your new clients were referred to your clinic.

-Room type: Used to categorize rooms.

-Telephone type: Available in the Person details document.

Vaccine: *For information on setting up vaccination schedules, please refer to “Module 2 – How to Set Reminders and Vaccination Schedules”.*

City: Defines the cities and provinces to be available from the Person details screen.

If you wish to modify an item from one of the drop-down menus:

- Simply select an item from the drop-down list and click **Modify** if you want to change the description.
- Delete** to remove the item. (If the item has been used in the past, you will not be able to delete it).
- Click **Add** to add a new item...
- Save** to save your changes.
- Cancel** to return to the beginning without saving your modifications.
- Close** to exit the form.

5. Taxes

The taxes are configured for your clinic upon installation of the software. For more information, see “Module 11: New features – Version 4.3”.