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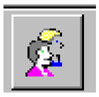
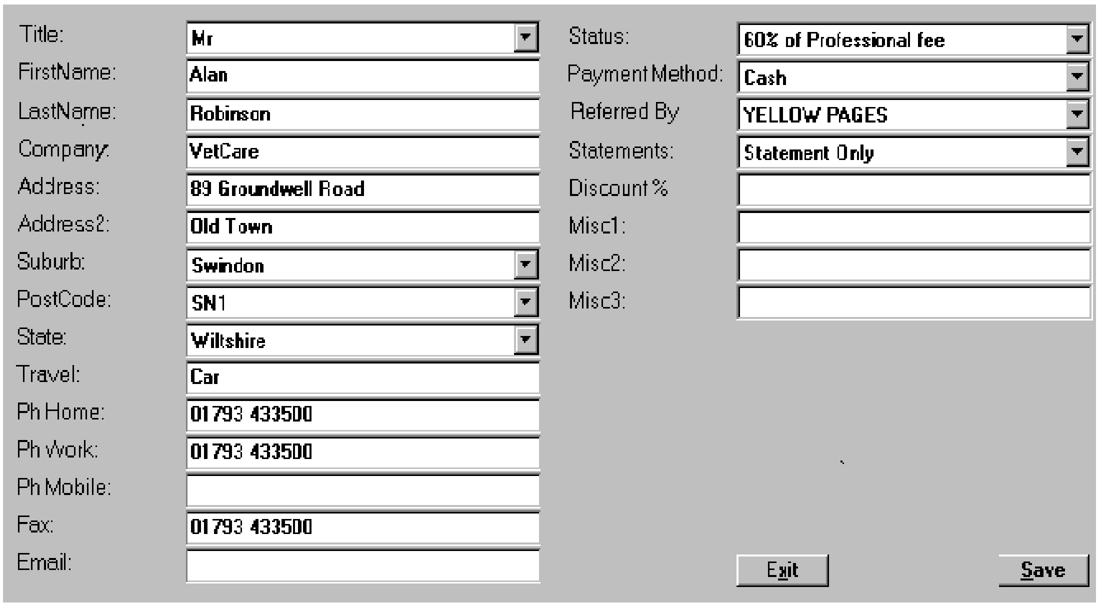
Adding a New Client

Click on the  or go to FILE from the MAIN MENU at the top right hand corner of the screen.



Title:	Mr	Status:	60% of Professional fee
FirstName:	Alan	Payment Method:	Cash
LastName:	Robinson	Referred By	YELLOW PAGES
Company:	VetCare	Statements:	Statement Only
Address:	89 Groundwell Road	Discount %	
Address2:	Old Town	Misc1:	
Suburb:	Swindon	Misc2:	
PostCode:	SN1	Misc3:	
State:	Wiltshire		
Travel:	Car		
Ph Home:	01793 433500		
Ph Work:	01793 433500		
Ph Mobile:			
Fax:	01793 433500		
Email:		Exit	Save

Fill in each box using the tab key to move to a new box. Use the drop down boxes when present, either by typing in the first few letters or scrolling through the list. Click Save when finished. This will automatically take you into a patient card.

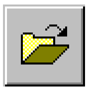
Again fill in the boxes using drop down boxes where present. The date of birth if entered must use / between day/ month/ year. When complete click Done and then either Save to put you into that card or Exit to take you back to the main list.

Adding another patient to this owner.
If in the client card already go to File at the top left hand corner click on that and then New Patient, or click on 

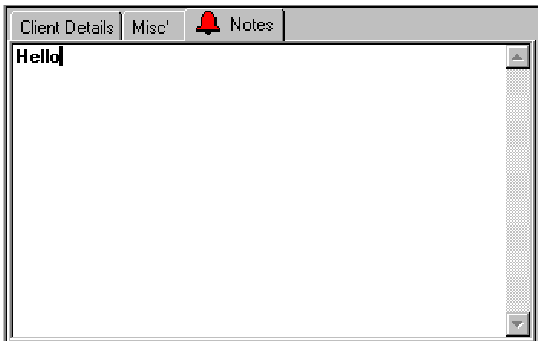
If at the main menu, highlight the correct client and then from the list at the top of the screen select client and new patient

Opening a Client File
From the MAIN MENU
Click in the Search By Last Name box 

and start typing the last name of the client until the arrow is pointing to the correct client.
Now press enter on your keyboard, or you can click on the Open Client File button on the bottom right of your screen.



Client notes



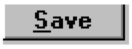
If you wish to attach a note to a client to remind you of something next time you open their file, do the following.
Once you have opened a client file, you will see on the top of the client details a tab called Notes, if you click on this tab a blank box will appear, click in the box so your cursor is showing on the screen and start typing your note, you can now click back on the client details button, you will now see a red bell appear on the notes tab.
When you open a client file and a red bell is showing, click on the notes tab to view your notes.
If you no longer need this note, click on the notes tab, then highlight the text and press delete on your keyboard and the note and the red bell will be removed.

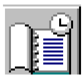
Merging Clients
If you have two clients listed and wish to merge them into one do the following.
From the Main Menu
(*As an example only I will refer to the first client as Mrs Mary Jones, the second client is her husband Mr Tom Jones*)
Start typing the last name of your client until e.g.: Mrs Mary Jones is highlighted in the list. Now click your right mouse button, and click on merge with another client. Now click on the client in the list you wish to be merged with e.g.: Mr Tom Jones so he is highlighted in the list, now click your right mouse button, and click on merge with another client.
A message will appear - Are you sure you want to delete the client Mrs Mary Jones and transfer all of their patients and financial history to Mr Tom Jones Yes/No?
Type in Yes and then click on the OK button.
Your clients have now been merged. If you would like to check that it worked, start typing in the last name e.g.: Jones, you will notice only Mr Tom Jones is listed not Mrs Mary

Editing client details

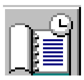
If already in the clients card, go to the top left hand corner of the screen and click on File and then edit client details. Edit all or part of the card and click 

Editing patient de-

Go to the top left hand corner and click on File or  from the top right. Edit the details and then click 

Appointments 

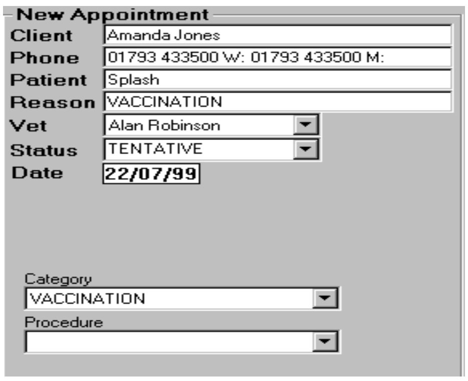
Making an appointment

From the MAIN MENU you get to the appointment screen by clicing in the Search By Last Name box and start typing the last name of the client until the arrow is pointing to the correct client, then click on the Make An Appointment For but-  ton on the bottom right of the screen, (or hold down the Alt key and press K).

Now you will be in the Appointment Screen

A list of the clients pets will be showing on the right, click on the patient name you wish to make the appointment for so it is highlighted in the list, and then press the enter key on your keyboard.

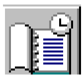
You will now see in the New Appointment box the client name and the patient name. The next box is the Category box, click on the down arrow to the right of this box, this will drop down a list of categories, click on the one you want so it is highlighted in the box, then press enter on your keyboard.



The next box is the Procedure box. follow directions as for category. (You have to select either a category or a procedure, you do not have to select both. You can also just type in the Category box if what you want is not in there).

If you wish to select a vet, click on the down arrow to the right of the box marked Vet, this will drop down a list of vets, click on the one you want so it is highlighted in the box and press enter on your keyboard.

The Calender will now be showing on th right of the screen, click on the date you wish to make the appointment for, the Day Book will now be showing any appointments for that day, click on the time slot you would like to make this appointment for, your new appointment will now be showing in the list. Now click on File, then click on Exit to take you back to the Main Menu.

If you have already opened a client and patient file and are at the consultation screen, you get to the Appointment Screen by clicking on Appointments from the top menu bar, or by clicking on the Appointment Diary but-  ton on the top button menu bar

(or hold down the Alt key on your keyboard and press K).
You will now see in the New Appointment box the client name and the patient name.
The next box is the Category box, click on the down arrow to the right of this box, this will drop down a list of categories, click on the one you want so it is highlighted in the box, then press enter on your keyboard.
The next box is the Procedure box. follow directions as for categories above. (You have to select either a category or a procedure, you do not have to select both. You can also just type in the Category box if what you want is not in there).
If you wish to select a vet, click on the down arrow to the right of the box marked Vet, this will drop down a list of vets, click on the one you want so it is highlighted in the box and press enter on your keyboard.
The Calender will now be showing on the right of the screen, click on the date you wish to make the appointment for, the Day Book will now be showing any appointments for that day, click on the time slot you would like to make this appointment for, your new appointment will now be showing in the list. Now click on File, then click on Exit to take you

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

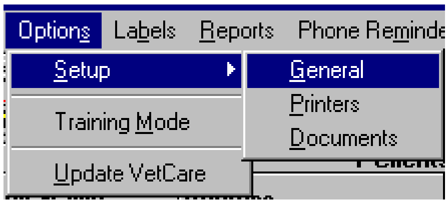
Rescheduling appointments
From the main menu, click on Appointments from the top menu bar, or by clicking on the Appointment Diary button  on the top button menu bar (or hold down the Alt key on your keyboard and press A).

Once in the appointment screen click on the appointment you wish to reschedule, now click on appointment from the top menu bar, then click on reschedule.
If you wish to reschedule to a different time on the same day, just click in the time slot you wish to change it to.
If you wish to reschedule to another day, click on the date you wish to change it to on the calendar on the right, you will now be viewing any appointments already scheduled on that day on the left, click on the time slot you wish to make this appointment for.
Click on File, then click on Exit.

Viewing Appointments
From the main menu, click on Appointments from the top menu bar, or by clicking on the Appointment Diary button on the top button menu bar (or hold down the Alt key on your keyboard and press A)
You will be viewing the Day Book for todays date by default, if you wish to view appointments for another day just click on the day you wish to view on the calender on the right and that days appointments will appear on the day book on the left.
Once you have finished viewing appointments, click on File, then click on Exit to take you back to the main menu.

Appointment Duration Settings

From the Main Menu, Click on Options, Setup, General



Now click on the Misc tab

If you look at the Appointments section you will see a box with the wording minutes and duration next to it.

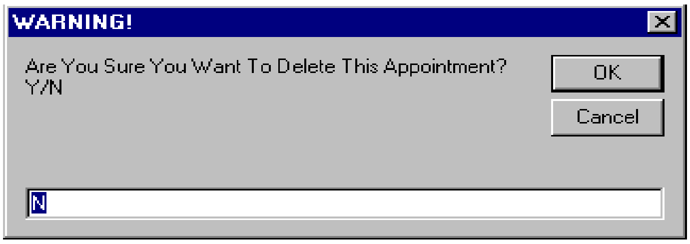
This box is were you type in the duration time you want e.g.: for 20 minutes just type 20 in the box, if you want the duration to be 30 minutes just type 30 in the box.

Once you have typed in the duration, click on File, then Exit.

Deleting an Appointment

From the Main Menu, click on Appointments from the top menu bar or by clicking on the Appointment Diary button on the top button menu bar  (or hold down the Alt key on your keyboard and press A).

Click on the appointment you wish to delete, now click on appointment from the top menu bar, now click on delete.



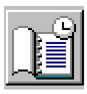
A Warning will appear

Are you sure you want to delete this appointment? Y/N

Type in Y and then click on the OK button.

Click on File, then click on Exit.

Editing an Appointment

From the Main Menu, click on Appointments from the top menu bar or by clicking on the Appointment Diary button on the top button menu bar  (or hold down the Alt key on your keyboard and press A).

You can edit the reason column for an appointment by doing the following

For the appointment you wish to edit click on the reason, then click on appointment from the top menu bar, then click on edit.

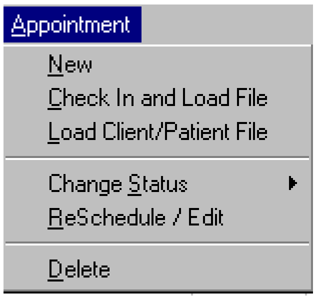
A box will appear Enter/Edit Reason, type in the new replacement information or alter what is already showing in the box, then click on the OK button.

Click on File, then click on Exit.

Loading Clients from the appointment screen

From the Main Menu, click on Appointments from the top menu bar, or by clicking on the Appointment Diary button on the top button menu bar (or hold down the Alt key on your keyboard and press A).

You will now be looking at the day book for today. Click on the appointment you wish to load.



Now click on Appointment from the top menu bar, then click on either of the following:

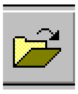
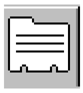
Check In and Load File - (this will automatically load the client and patient for you and will also change the appointment status to checked in)

OR Load Client/Patient File - (this will automatically load the client and patient for you)

New Consultations

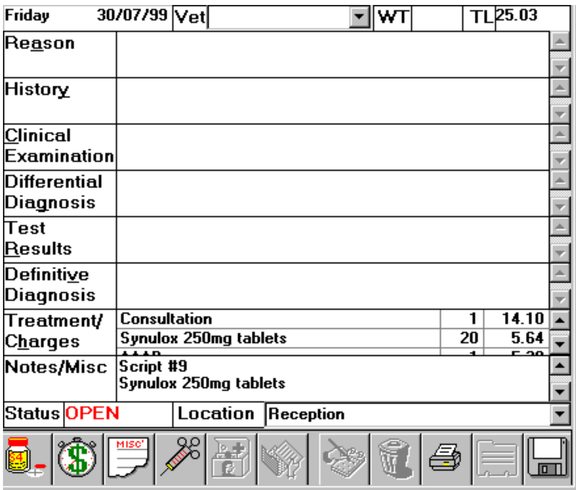
From the main menu you need to open a client file.

From the CONSULTATION SCREEN

Open  the patient file, then click on the  New Consultation button at the bottom of the consultation card, (or hold down the Alt key on your keyboard and press N).

The Status at the bottom of the consultation card will now say OPEN in red and your cursor will be flashing in the date section ready for you to start the new consultation.

Performing a consultation



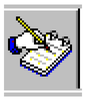
Once the consultation is open the cursor will be in the date box, if the date is correct click the tab button on your keyboard, this will take you to the Vet box, select your vet from the drop down list then press tab, this will take you to the weight box, type in the weight if you wish, press tab, the cursor will now be flashing in the Reason area on the consultation card, type in the reason eg: limping, press tab, the cursor will now be flashing in the History area on the consultation card, type in any history eg: hit by car.

This would usually be all that is entered at the reception, so you would now click on the location & change it to consult 1 and then click on the save consultation button on the bottom right of the screen. A window will appear askingFinalise Consultation Now? Yes or No. You would click on No as we only wish to save the consultation at this stage as we have only just started the consultation.

The person on reception can now close this clients file and work on something else, or continue to book in further clients.

In The Consultation Room

The vet would click on the unfinalised consults but-  ton on the top button menu bar and open the next client and patient from the list which will be marked consult 1.

Click on the edit consult button on the bottom of the screen  and type any further information into the different areas of the consult card, these areas can be filled in or left blank at your discretion, (all of these areas can be used for research and target mailing purposes).

For Example

In Clinical Examination (can't put weight on right rear leg, very tender, severe swelling)

In Differential Diagnosis (suspected fractured femur)

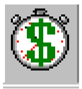
In Test Results (x-rays taken)

In Definitive Diagnosis (green stick fracture to femur 3cm above knee joint)

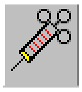
Treatment/Charges

You can type in all the areas except Treatment/Charges as this is where the Money goes, so you want no mistakes here, all billable items are selected from one of the following lists which you create to en- sure uniform charging of all products and services.

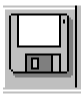
F2 Drugs and Con-  sumables

F3 Professional Fees 

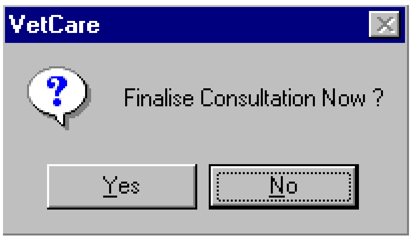
F4 Misc Charges 

F5 Vaccinations 

You can see 2 lines for each heading in the consultation card at all times, if you wish to see more for a particular heading eg: History, just click on the word history and the history

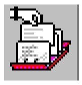
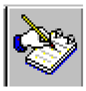
Once you have finished entering information and have selected all fees, drugs etc from the lists and are finished in the consultation room, change the location back to reception and then click on the save consultation button  on the bottom right of the screen.

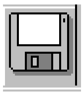
A window will appear asking
Finalise Consultation Now?
Yes or No



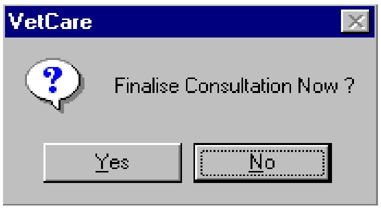
The vet would click on No as we only wish to save the consultation at this stage and send the client and patient back to reception.

Back in Reception

The person on reception would open the client and patient from the  unfinalised consultation list which will have reception as the location, click on  the edit consultation button on the bottom of the screen,

now click on the  save consultation button on the bottom of the screen.

A window will appear asking
Finalise Consultation Now?
Yes or No

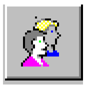
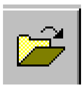


You would click on Yes as the customer is ready to leave.
A window will appear asking
Cash Sale?
Yes or No
If the client is paying you now by cash, cheque, or credit card you would click on yes.
You will now be at the over the counter products screen, select any items if necessary, then click on the payment method etc, then click on Finish.
A window will appear asking
Print Receipt?
Yes or No
Click on yes if your client would like a receipt, otherwise click on no.

If it is not a cash sale and you wish to charge it to their account, you would do the following:
Cash Sale?
Yes or No
You would click on no.
A window will appear asking
Product Sales?
Yes or No
Click yes if your client wishes to purchase over the counter items, select the items from the list then click on finish, otherwise click on no.
A window will appear asking
Print Invoice Now?
Yes or No
If you wish to give your client the invoice now click on yes, otherwise click on no.

(Important - *If you get a customer who does not have an account with you and when they go to pay the bill for eg: £70.00 and they thought it would only be about £50.00 and have to come back to give you the difference, you would say no to cash sale, so it will go to an account, then you would do an account payment straight away for the £50.00 and you have record of them owing you a further £20.00*).

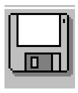
Loading Clients from the Unfinalised Consultations List
From the Main Menu, click on reports, then click on unfinalised consultations
From the Unfinalised Consultation Screen
You can load your client and patient from this list by clicking on the patient you want and then clicking on the load button, the client and patient file will be loaded automatically ready for you to start a consultation.

To View Previous Consults
From the Main Menu you need to open a client  file.
From the CONSULTATION SCREEN
Open the patient file. 

A list of previous consultations appears on the top right of the screen above the"Consultation Card on the Consultation Screen. To view the entire consultation click on the desired consultation so the arrow is pointing to it, the details will now fill the consultation card below.
You can use your up and down arrows on your keyboard to scroll through the previous consultations, the previous consultation with the arrow pointing at it will appear below.

Deleting a Finalised Consultation
WARNING!! If a consultation has been finalised and an invoice, or invoice and payment have been generated deleting the consultation will not remove the invoice or payment it will only delete the consultation.

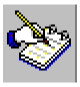
To delete a finalised consultations, have the consultation you wish to delete showing on the consultation card, if it is a previous consultation click on the consultation in the previous consultations list above so it appear on the consultation card, now click on the delete consult button, it will  ask if you are sure you want to delete the consultation, type in yes and click on OK.

Deleting an Unfinalised Consultation

To delete an unwanted consultation that has not yet been finalised, click on save, when it askes if you want to finalise the consultation click on no, the consultation will be closed, click on the delete consult button on the bottom it looks like a rubbish bin, a message will appear asking if you are sure you want to delete this consultation, you need to type in yes and click on OK and the consultation will be deleted. 

Deleting from the Unfinalised Consults List
From the Main Menu, click on Reports, Unfinalised Consultations
Before deleting from this list load the client and patient and make sure the consultation is finalised first. If you are sure the consultation is finalised, go back to the unfinalised consultation screen and click on the entry you wish to delete. Then click on the black arrow on the left of this line so the whole line is highlighted and the cursor is flashing somewhere in the line, now click on the delete button on your keyboard.
Once you have finished click on File, then click on Exit.

Deleting Items Within A Consultation

If you have not yet finalised the consultation and you have selected a drug or a professional fee by mistake and wish to delete it you can. You do not delete the drug from the drug screen you need to exit back to the consultation. This is also the case with professional fees you do not delete the fee from the professional fees screen you need to exit back to the consultation.

The status of the consultation needs to be open, Status OPEN you can see the status field at the bottom of the consultation card in red. If the status says closed, click on the edit consultation button  so that the status changes to open.

To be able to see treatments and charges easily click on Treatment/Charges on the consultation card so that this section fills the card, the top box will show treatments and charges and the bottom box notes/misc will show any label information relating to any drugs you may have selected. The heading will now be yellow.

(*Only click the right mouse button if it is specified right mouse button otherwise all other clicks are with the left mouse button*)

To delete a professional fee click on the fee so your cursor is flashing in the line of the fee, now click your right mouse button, now click on delete.

To delete a drug or consumable item,click on the item so your cursor is flashing in the line, now click your right mouse button, now click on delete.

When deleting a drug you can also delete the information in notes/misc relating to this drug, to do this you need to highlight the information as it is just a text field then click on the delete button on your keyboard.

You can now click on the heading Treatments/Charges showing in yellow and you will be able to see all fields on the consultation card as before.

You can now continue with the consultation.

Deleting Products added during consultation

If you are at the product sales screen and have selected an item by mistake and it is showing on the top right of the screen, double click on the item in the list on the top right and it will be deleted.

You can now continue selecting items or finalise the sale.

To View Waiting Client List

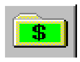
From the Main Menu, click on Reports, then click on unfinalised consultations

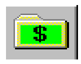
This list will show all patients on the premises, the location column will tell you where they are e.g: in reception or waiting to come into the consulting room..

In the consultation room the vet would leave the computer viewing the unfinalised consultation list when they are not entering information into a consultation. This enables them to see how many clients are waiting in the waiting room etc without having to go and have a look, this screen auto refreshes and updates the list automatically.

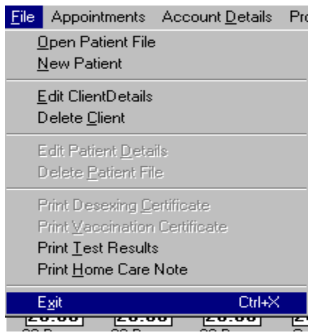
You can load your client and patient file from this list by clicking on the patient you want and then clicking on the load button, the client and patient file will be loaded automatically ready for you to start a consultation.

Creating An Invoice
An invoice is generated when you finalise a consultation
Look in the manual under Performing a Consultation
This will step you through a complete consultation right through to invoice or receipt stage.

Viewing Account Details
If you are at the main menu you get to the Account Details Screen by clicking in the Search By Last Name box and start typing the last name of the client until the arrow is pointing to the correct client, then click on the Revenue Account Details Or Make An Account Payment button on 

the bottom right of the screen, (or hold down the Alt key and press D).
If you have already opened a client file and are at the consultation screen, you get to the Account Details Screen by clicking on Account Details from the top menu bar, or by clicking on the Account Details/Payments button on the 

top button menu bar (or hold down the Alt key on your keyboard and press D).
From here you can see all invoices, payments etc.
If you wish to see what was purchased on any invoice just click on the invoice so the arrow is pointing to it and you will see in the box below all items sold on that invoice.
When you are finished click on File, then click on Exit.



Deleting an Account Payment
Go To The ACCOUNT DETAILS SCREEN (See Viewing Account Details)
Payments will be showing on the top left of the screen, highlight the payment you wish to delete and click your right mouse button, then click on delete.
A message will appear
If you delete this payment the balance of the corresponding invoice will be adjusted along with the clients account balance.
Do you wish to continue? Yes/No
Type in Yes and then click on the OK button.
Click on File then click on Exit.

Deleting an Invoice
Go To The ACCOUNT DETAILS SCREEN (See Viewing Account Details)
On the top right of the screen you will see all invoices listed for this client.
Click on the invoice you wish to delete so the cursor is flashing in the line, then click on the black arrow to the left of the invoice number (*you should now see the whole line highlighted and the cursor flashing in the line*).
Now click on the delete button on your keyboard.
A Message will appear warning you of the following:
“If you delete this invoice you will also delete any account payments, credits or adjustments related to it. Are you sure you want to continue? Yes/No”

If you are sure you want to delete this invoice type in yes and click on the OK button.
For the account balance to adjust exit back to the main menu by clicking on File, then Exit and then come back in to check the account balance, VetCare will have refreshed the balance.
Once you have finished click on File then click on Exit.

Making an Account Payment
Go To The ACCOUNT DETAILS SCREEN (See Viewing Account Details)
Go to the Make Payments Section, this is a 4 step procedure.
Step 1 is Select Payment Distribution Method
Automatic or Manual
(*If you select automatic the payment will pay the oldest invoice and work forward, you would use automatic unless you wish to pay a particular invoice only, that is not the oldest invoice*)

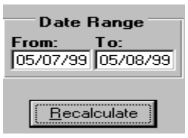
For An Automatic Payment
Step 1 Click in the circle next to Automatic so that a black dot appears.
Step 2 (Select Payment Type) - click in the circle next to Cash, Cheque or Credit Card so a black dot appears in the one you want. The next box is chq/Card Number, if your client is paying by cheque of credit card type in the cheque details or credit card number.
Step 3 (Change Date If Required, Then Enter Total Payment Amount) - in the Date box change the payment date if necessary, then in the Amount box type in the amount your client is paying.
Step 4 (Make Payment) - once you are happy with the details in step 1,2 and 3, click on Make Payment.
A window will appear asking Print Receipt?
Yes or No
Click on the yes button if you would like a receipt printed if not click on the no button.

For A Manual Payment
Step 1 Click in the circle next to Manual so that a black dot appears.
Step 2 (Select Payment Type) - click in the circle next to Cash, Cheque or Credit Card so a black dot appears in the one you want, the next box is chq/Card Number, if your client is paying by cheque of credit card type in the cheque details or credit card number.
Step 3 (Click On Invoice To Pay, Change Date If Required, Then Enter Payment) - on the top right hand side of the screen you will see the clients invoices listed, click on the invoice you wish to pay, so the arrow is pointing to it, now go back to step 3 and in the Date box change the payment date if necessary, then in the Amount box type in the amount your client is paying.
Step 4 (Make Payment) - once you are happy with the details in step 1,2 and 3, click on Make Payment.
A window will appear asking Print Receipt?

Yes or No
Click on the yes button if you would like a receipt printed if not click on the no button.
If you have finished click on File
Then Click on Exit

Cash Refunds Or Crediting Account
If you are at the main menu you get to the Transaction Summary Screen by clicking in the Search By Last Name box and start typing the last name of the client until the arrow is pointing to the correct client. Then click on the View A Transaction Summary For button on the bottom right of the screen,  (or hold down the Alt key and press T).

To refund a client or credit their account for a particular item or fee do the following:
This screen will automatically show you today's transactions, you may need to change the date range to show the transaction date that they purchased the product or fee, when changing the dates make sure you use the forward slash to separate date, month and year e.g.:
From: 12/10/98 To: 12/11/98
Then click on the recalculate button.



Listed above will be all transactions for the selected date range you entered.
When you click on the transactions above you will see the items purchased for that particular transaction listed on the bottom left of the screen. Once you can see the item you wish to refund, click on it in the items list on the bottom left of the screen, then click on returns from the top menu bar. VetCare will have either cash refund available or credit account. Click on which ever one is available, (*VetCare knows automatically if the item was purchased on their account and will then allow you to credit their account or if it was a cash consultation and then it will allow you to select cash refund*).
A message will now appear saying either
Cash Refund for Cash Consult for e.g.: £38.00? Y/N
With a Yes, No and Cancel button to choose from
or
Credit (Client Name) Account for Account Consult e.g.: £38.00? Y/N
With a Yes, No and Cancel button to choose from
If it is showing the correct information for your refund or credit click on the Yes button and a refund or account credit will be generated.
Once you have finished, click on File, then click on Exit

Discount £ Value
You can give a client a temporary price when selecting fees or products from within a consultation or you can give a client a pound value discount at the end of the consultation by doing the following:
FOR A CASH SALE
If it is a cash sale when the consultation is finished, click on the save button.
A message will appear - Finalise consultation now?
Yes No - Click on the Yes button
A message will appear- Cash Sale?
Yes No- Click on the Yes button
Click in the discount box and type in the pound value e.g.: for £5.00 type in 5 or 5.00, you will now see below the discount box the new total, you can now select the tender type then click on the finish button.

FOR AN ACCOUNT SALE

If it is an account sale when the consultation is finished, click on the save button.
A message will appear - Finalise consultation now?
Yes No - Click on the Yes button
A message will appear - Cash Sale?
Yes No - Click on the No button
A message will appear - Product Sales?
Yes No - Click on the Yes button
You may not wish to select any extra products but by clicking on yes it will take us to the screen to be able to apply a pound value discount.
Click in the discount box and type in the pound value e.g.: for £5.00 type in 5 or 5.00, you will now see below the discount box the new total, you can now click on the finish button.

Discount % Percentage

You can set a client up to automatically receive a % percentage.
From the Main Menu open the client file you wish to receive automatic discounting.
Once you have the client file open, click on File, then click on edit client details, in the discount % box type in the discount you wish to give this client e.g.: for 10 % you would type 10 in the box, then click on the save button.
You also need to flag professional fees and products that you want the discount to be applicable to. To do this go to the main menu.
From the Main Menu
Click on Lists, General Data, then click on the professional fees tab. You need to make sure you have a tick in apply automatic discount for any professional fee you want the discount to apply to and then click on save. Do the same for products if you wish any products to be discounted.
From now on when you are in a consultation and the client has a % discount applicable, when you select professional fees or products that have the automatic discount applicable the price will show in red in the discounted price box, (*you can over ride this price if you want by typing in a temporary price*).
Discounted prices will only show if the client has been give a discount % otherwise the standard list prices will be showing.

Print Statements

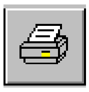
From the Main Menu click on Reports, Statements
Near the bottom of the screen you will see Print statements for the month of…, make sure you have the correct month showing in the box. To change the month or year, click on the down arrow in the box and select the month or year you wish to print.
Click on the print button
Your statements will start printing.
If you have a large quantity of statements to print and only have one general printer you may prefer to print the statements in sections so the printer is not tied up for too long for e.g.: A to K and then you might print L to Z.
To do this take the tick out of the print all box, to do this click on the tick, you will now see the from and to are now available.
Click on the client you want to start printing from. Next click on the black arrow to the

left of the client last name so the whole line is highlighted. Now scroll down and click on the client you wish to print to, then click on the black arrow to the left of the client last name so the whole line is highlighted.
You will see the names now showing in the from and to box.
Click on the print button.
Your statements will now start printing.
Click on File, then click on Exit

Reprinting a Receipt
Go To The TRANSACTION SUMMARY SCREEN (See Cash Refunds or Crediting Account)

This screen will automatically show you today's transactions, if you wish to see previous transactions displayed, go to the Date Range and change the From and To dates and then click on the Recalculate button.
You will now see listed below, all transactions for the new date range you entered.
Click on the Receipt Number you want so the arrow is pointing to this receipt, now click on File, then click on Reprint Receipt.
Once you have finished, click on File, then click on Exit.

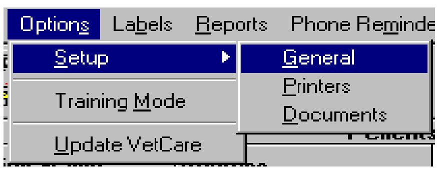
Reprinting a Statement
From the Main Menu start typing the last name of the client you want to print a statement for so they are highlighted in the list, now click on the print an account statement button on the bottom far right of the screen.



This will bring you to the statement screen.
Near the bottom of the screen you will see Print statements for the month of, make sure you have the correct month showing in the box, to change the month or year, click on the down arrow in the box and select the month or year you wish to print.
Click on the print button
Your statement will now start printing.
Click on File, then Exit.

Reprinting an Invoice
Go To The ACCOUNT DETAILS SCREEN (See Viewing Account Details)
In the invoice listing on the top right side of the screen, click on the invoice number you would like reprinted, so the arrow is pointing to it.
Now click on File, then click on Print Invoice.
If you are finished, click on File, then click on Exit.

Setting 15 or 30 Day Period

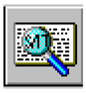


1. From the MAIN MENU click on OPTIONS
2. Click on SETUP
3. Click on GENERAL
4. Click on the Misc.' Tab

This is were you can set your accounting period to either 15 day account or 30 day account. Select by clicking in the circle next to 15 day account or 30 day account so that

a black dot appears.
Click on File and then click on Exit.

Viewing a Clients Transaction Summary

Go To The TRANSACTION SUMMARY SCREEN (See Cash Refunds or Crediting Account) 

This screen will automatically show you today's transactions, if you wish to see previous transactions displayed, go to the Date Range and change the From and To dates and then click on the Recalculate button

You will now see listed below, all transactions for the new date range you entered.

If you would like this summary printed, click on File, then click on Print Summary. 

Once you have finished, click on File, then click on Exit.

OVER THE COUNTER SALES

If you are at the main menu you get to the Over The Counter Sales Screen by clicking on Cash Register from the top menu bar, then click on Cash Sale. Or you can click on the Cash Sale button on the top button  menu bar (or hold down the Alt key and press G).

IMPORTANT - Following these steps the sale will show in your reports, but the value will not be attributed to a clients spending. If you wish the amount to be attributed to the client, open the client's file then click on Product Sales from the top menu bar, then click on either Cash or Account.

On the left is the list of over the counter items.

Click on the product in the list and press the enter key on your keyboard, or click in the Enter Search Text box and start typing the name of the product until it is highlighted in the list, or it is showing in the Description box above, now click on the Add button. (*If you wish to alter the price, click in the temporary price box and type the amount you wish to charge before clicking the Add button*).

If you wish to select further products repeat the above steps.

If you wish to sell something that is not in your list, click on the Miscellaneous Item button, now type in the description, price and quantity, you can also select a category if you wish, then click on the Add button.

Once you have added all the items you want, go to the payment type and click in the circle next to Cash, Cheque or Credit Card so a dot appears next to the one you want, if paying by cheque or credit card click in the Chq/Card Number box and type in the details. (*If you loaded the client and selected product sales then account you do not get the payment type showing as VetCare knows its going on their account*)

From here you can just click on Finish, or if the client is paying by cash and you would like to know how much change to give them, click in the Amount Tendered Box and type in the amount they have given you, this will show you how much change to give them, then click on Finish.

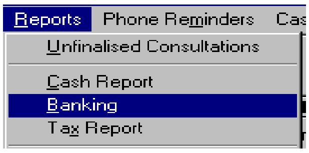
A window will appear asking

Print Receipt? - Yes or No

If you would like a receipt printed click on the Yes button if not click on the No button.

This will take you back to the Main Menu

Changing Tender Type
From the Main Menu
Click on Reports, Banking

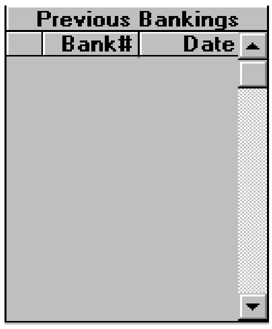


In the unbanked receipts list on the left, click on the line you wish to change the tender type on, then click on the change tender type button, now click on the tender type you wish to change it to.

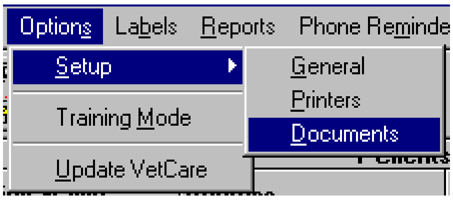
Click on File, then click on Exit.

Creating a New Banking
From the Main Menu, click on Reports, Banking
You will now be at the banking screen, you will see on the left of the screen any unbanked receipts listed.
Click on File, New Banking. Now in the bank all section on the bottom left of the screen, click on the appropriate buttons you wish to bank, Cash, Cheque, C Card, when you click on these buttons e.g.: cash, all cash will move across to the summary of this banking on the right of the screen.
You can use the bank all buttons or you can click on the receipt in the unbanked receipts list then click on the black arrow to the left of the receipt so the whole line is highlighted, then click on the Bank/Unbank button and it will move it across to the summary on the right.
If you have banked something by mistake and it is showing in the summary, click on the receipt in the summary list then click on the black arrow to the left of the receipt so the whole line is highlighted, then click on the Bank/Unbank button and it will move it back to the unbanked receipts list on the left.
The summary of this banking will be showing on the right of the screen with banking totals showing on the bottom right.
Now click on File, Print Summary
Now click on File, then click on Exit.
(You might want to do a banking for all credit cards and eftpos (switch), and do a separate banking for cash and cheques that you take to the bank, that way you will be able to use the summary as a remittance to attached with your banking)

Viewing Previous Banking
From the Main Menu
Click on Reports, Banking
You will see previous bankings showing on the top right of the screen, click on the bank # or date that you wish to view, the summery for that banking will now be showing below in the summary of banking #
When you have finished viewing click on File, then click on Exit.



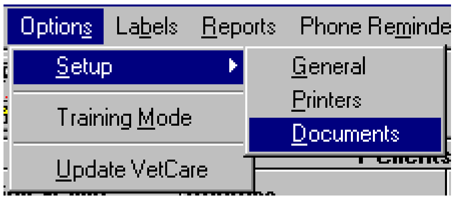
Creating Cage Card



1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on Documents

This will bring you to the VetCare Document Editor Screen.
You will now be looking at a blank page on the left, click on the page so your cursor is flashing on the page and you can now start typing your cage card layout details.
To add fields, click on the page where you wish to place a field so the cursor is flashing and then click your right mouse button. Now click on insert field, then click on either client field, patient field or consult field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on ok.
Once you have finished your alterations, click on the save as button, the 'save home care note as' box will say VetCare. Listed below you will see a folder called notes, double click on this folder. The 'look in' box will now say notes, now click in the file name box and type in 'Cagecard.rtf' then click on save.
(The cage card must be called Cagecard.rtf and it must be in the notes folder)
You can print a test page if you wish, when you have finished click on file, then click on exit.
When you print a test page VetCare puts details in the fields as an example. If you need to make further changes after you print a test page, you need to click on the Open button and double click on the note folder then double click on Cagecard.rtf to open it again before making further changes.

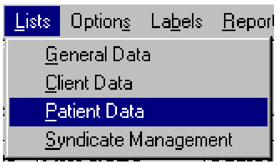
Editing Cage Card

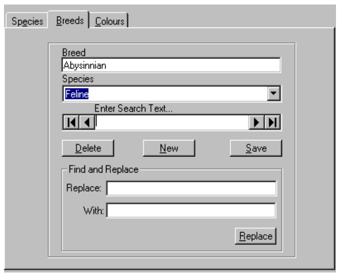


1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on Documents

This will bring you to the VetCare Document Editor Screen.
Click on the Open button. The select a document box will now appear, 'look in' will say VetCare. Listed below you will see a folder called notes, double click on this folder now double click on Cagecard.rtf, this will show you the cage card on the left. From here you can make any necessary alterations.
To add fields, click on the note where you wish to place a field so the cursor is flashing on the page. Next click your right mouse button, then click on insert field, now click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on OK.
Once you have finished your alterations, click on the save button.
You can print a test page if you wish, when you have finished click on file, then click on exit.
When you print a test page VetCare puts details in the fields as an example, if you need to make further changes after you print a test page, you need to click on the Open button and select the cage card again as we did above before making further changes.

Adding To Breed List





1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Breeds heading

Click on the New button.
Click in the Breed box and type in the new breed.
Click in the Species box and type in the species.
Now click on the Save button.
If you wish to make another new breed, click on the New button and repeat the above steps.
If you are finished click on File and then click on Exit.

Deleting from Breed List

1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Breeds heading

Click in the enter search text box, start typing the name of the Breed you wish to delete until it appears in the breed box. (*you can also use the left and right arrows on either side of the enter search text box to find the breed you wish to delete*)
Now click on the Delete button.
A WARNING will appear
Are You Sure You Want To Delete This Breed?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further breed, click in the enter search text box and start typing the name of the breed you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

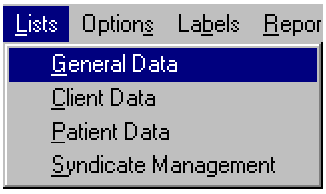
Editing Breed List

1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Breeds heading

Click in the Enter SearchText box, start typing the name of the Breed you wish to Edit (*you can also use the left and right arrows on either side of the enter search text box to find the breed you wish to edit*). Once you see this breed appear in the breed box, click in the breed box and alter the name, then click on the Save button.
If you wish to edit another breed, click in the enter search text box and start typing the name of the breed you wish to edit and repeat the above steps.
If you wish to replace a breed with something else e.g.: you may want to change Rotti/ Dob to Rotti X, go to the next section Find and Replace.
Click in the replace box and type the name of the breed you wish to replace eg: Rotti/Dob.
Now click in the With box and type the replacement breed name e.g.: Rotti X.
Now click on the Replace button.
A window will appear letting you know how many replacements were made, click on ok.
If you wish to replace another breed, click in the replace box and start typing the name of the breed you wish to replace and repeat the above steps.
If you are finished, click on File and then click on Exit.

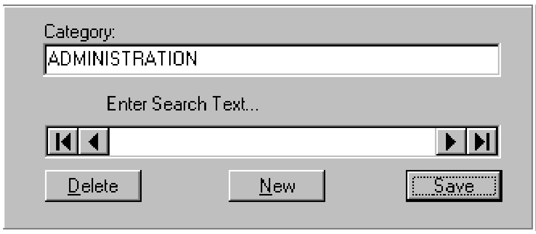
Categories

Creating a New Fee or Product Category



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Fee/Product Categories Heading

Click on the New button, the cursor will be in the Category box - type the name of your new category and click on the Save button.



If you wish to make another new category, click on the New button and repeat the above steps.

If you are finished click on File and then click on Exit

Deleting from Category List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Fee/Product Categories Heading

Click in the Enter SearchText box, start typing the name of the Category you wish to Delete (*you can also use the left and right arrows on either side of the enter search text box to find the category you wish to delete*), once you see this Category appear in the Category box click on the Delete button.

A Warning Will Appear!!!!

Are You Sure You Want To Delete This Category? Y/N

You need to type in the box below Y and then click the OK button.

If you wish to delete a further category, click in the enter search text box and start typing the name of the category you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.

Editing Category List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Fee/Product Categories Heading

Click in the Enter SearchText box, start typing the name of the Category you wish to Edit (*you can also use the left and right arrows on either side of the enter search text box to find the category you wish to edit*), once you see this Category appear in the Category box, click in the Category field and alter the name, then click on the Save button.

If you wish to edit another category, click in the enter search text box and start typing the name of the category you wish to edit and repeat the above steps.

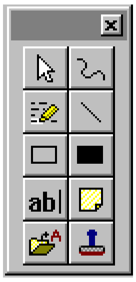
If you are finished, click on File and then click on Exit.

Creating Eye, Dental or Skin Charts

To create charts, you need to have a client and patient file open then click on new consultation or edit a consultation so that the status is Open. Now click on the appropriate tab e.g.: skin chart, dental chart or eye chart.

Status OPEN

To create a new chart click on the new New button. A list of templates will appear (*you can scan in more templates if you wish*), double click on the template you wish to use and it will be selected ready for you to use the tool bar on the right side of the screen. If you hold the mouse over the buttons it will tell you what they are for, e.g.: the squiggly line in the top right is Freehand Line, if you click on this your mouse pointer will turn into a pencil, if you place the pencil on the chart and hold down the left mouse button you can draw on the chart. Also on the bottom right of the tool bar you will see rubber stamps, you may or may not have some stamps ready to use, click on the stamp with your left mouse button and a list of stamps will appear, click on the one you want, your mouse pointer will now turn into a stamp and you put the stamp over the chart and click with your left mouse button to stamp on the chart.



Once you have finished drawing or stamping, click on File, Exit, a box will appear saying image has changed do you want to save changes, click on yes, if you do not wish to keep the chart click on no.

Your chart will now appear in the consultation, you can save the consultation if you are finished.

Once a consultation has a chart saved a bell will appear next to e.g.: skin chart or dental chart to let you know it is there so you can refer to it easily.

Skin Chart

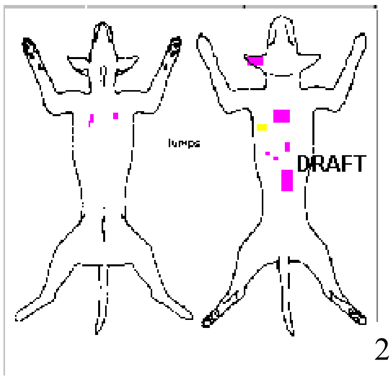
Editing a Chart

To edit a chart the consultation status needs to be open. Click on the chart tab with the bell next to it, now click on the Edit Edit button next to the chart, this will take you back into the area where we created the chart. You can now make any alterations to the chart, when you are finished click on File, Exit. A message will appear asking if you wish to save the changes, click on yes, then you can save the consultation again if you are ready.

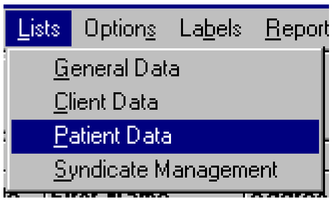
Viewing a Chart

To view a chart in a consultation, click on the tab with the bell next to it. Skin Chart

Now click on the View View button next to the chart and it will make it larger for you to view, when you have finished viewing the chart, click on the X in the top right hand corner of the screen and it will minimise the chart again.



Adding to Colour List



1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Colours heading

Click on the New button.

Click in the Colour box and type in the new colour.
Click in the Species box and type in the species, leave the box blank if this colour is used for more than one species.
Now click on the Save button.

If you wish to make another new colour, click on the new button and repeat the above steps.
If you are finished click on File and then click on Exit.

Deleting from Colour List

1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Colours heading

Click in the enter search text box, start typing the name of the Colour you wish to delete until it appears in the colour box. (you can also use the left and right arrows on either side of the enter search text box to find the colour you wish to delete)
Now click on the Delete button.

A WARNING will appear
Are You Sure You Want To Delete This Colour?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further colour, click in the enter search text box and start typing the name of the colour you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

Editing Colour List

1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Colours heading

Click in the Enter SearchText box, start typing the name of the Colour you wish to Edit (*you can also use the left and right arrows on either side of the enter search text box to find the colour you wish to edit*). Once you see this colour appear in the colour box, click in the colour box and alter the name, then click on the Save button.
If you wish to edit another colour, click in the enter search text box and start typing the name of the colour you wish to edit and repeat the above steps.
If you wish to replace a colour with something else e.g.: you may want to change orange to apricot, go to the next section Find and Replace.
Click in the replace box and type the name of the colour you wish to replace e.g.: orange.
Now click in the With box and type the replacement colour name e.g.: apricot.
Now click on the Replace button.

A window will appear letting you know how many replacements were made, click on ok.
If you wish to replace another colour, click in the replace box and start typing the name of the colour you wish to replace and repeat the above steps.
If you are finished, click on File and then click on Exit.

Selecting Drugs within a Consultation

Once you have opened a client and patient file and started a new consultation you can select drugs.

Click on the drugs and consumables button on the bottom of the screen,  (or press F2 on your keyboard).

The cursor will be flashing in the enter search text box, start typing the name of the drug until it is highlighted in the list. Now click on the Regime button you wish to select, as you select drugs a list will appear in the box on the left, when you have finished click on exit.

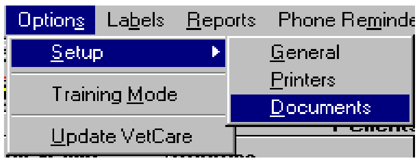
(*If a regime is close to what you want you can put the mouse pointer on the text in the text box of that regime and double click your mouse, this will drop the exact information into the other regime box for you to alter. You can change the text and you can alter the quantity, when you are happy with the changes, click on the other button*).

(*If you wish to alter the dispensing fee for this drug click on the small box next to add dispensing fee of, so the tick vanishes. You can now alter the price. Now click on the box so the tick appears again, you will notice the prices has changed accordingly, click on the regime you want*).

(*If you wish to drop the dispensing fee for this drug, click on the small box next to the add dispensing fee so the arrow vanishes, now click on the regime you want*).

Any changes you make are only temporary, the regimes will return to their pre-set values

Creating Home Care Notes



1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on Documents

This will bring you to the VetCare Document Editor Screen.

You will now be looking at a blank page on the left, click on the page so your cursor is flashing on the page and you can now start typing your home care note details.

To add fields, click on the page where you wish to place a field so the cursor is flashing. Next click your right mouse button and click on insert field, then click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.

To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on ok.

Once you have finished your alterations, click on the save as button. The 'save home care note as' box will say VetCare. Below you will see a folder called notes, double click on this folder, the 'look in' box will now say notes. In the 'File Name' box, type in the name you wish to give this home care note e.g.: surgery and then click on save.

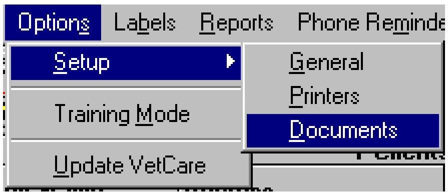
You can print a test page if you wish, when you have finished click on file, then click on exit.

When you print a test page VetCare puts details in the fields as an example. If you need to make further changes after you print a test page, you need to click on the Open button then double click on the notes folder, then double click on the homecare note e.g.: surgery to open it again before making further changes.

You need to exit to the main menu for the list of home care notes to refresh and show in the listing for your next step.

Home care notes can be attached to professional fees and products so that a home care note will automatically print once you select that particular fee or product from a consultation. To set this up click on lists from the main menu, then click on general, then click on professional fees or products. For any fee or product you wish to have a home care note print, click on the down arrow on the home care note box and select the note you wish to attach, then click on save. (*you need to create the home care notes first so they appear in the list*)

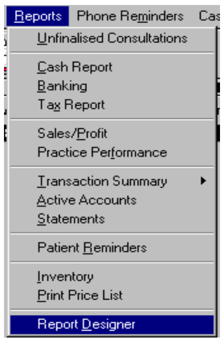
Editing Home Care Notes



1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on Documents

This will bring you to the VetCare Document Editor Screen.
Click on the Open button, the select a document box will now appear. ‘look in’ will say VetCare. You will see the notes folder below, double click on the notes folder. Listed below you will now see any home care notes you have created, double click on the home care note you wish to alter, this will show you the home care note on the left. From here you can make any necessary alterations to the home care note.
To add fields, click on the note where you wish to place a field so the cursor is flashing on the page. Next click your right mouse button and click on insert field Then click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on ok.
Once you have finished your alterations, click on the save button.
You can print a test page if you wish, when you have finished click on file, then click on exit.
When you print a test page VetCare puts details in the fields as an example. If you need to make further changes after you print a test page, you need to click on the Open button and select the home care note again as we did above before making further changes.

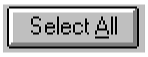
Creating Address Labels

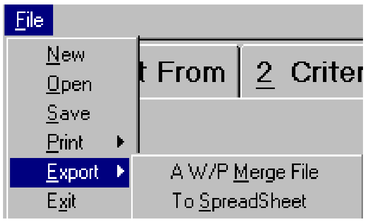


Mailing Labels using Report Designer
From the Main Menu in VetCare, click on Reports, Report Designer
Step 1 Select From
In the Client box click on the down arrow and click on Last Name
Step 2 Criteria
Click on the Criteria tab
In the first box Last Name will appear in the next box click on the down arrow and select <> then in the third box type in anything that is not a last name e.g.: dfdfdfd, then click on the And

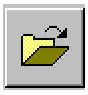
button.
Step 3 Fields
Click on the Fields tab
In the fields to include available box you need to click on the fields you want to appear on your labels one at a time e.g.: Title, First Name, Last Name, Address etc. so they appear in the ‘Include these’ box.

Now click on the Search button, a list or search results will be listed below.
Click on the Select All button



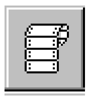


Now click on File, Export, A W/P merge file
Start Word Processor Now? Click on the Yes button
Use existing Form Letter? Click on the No button
Your word processing program will now be open
Start a new document by clicking on the new document button
or File, New, Blank document
Now click on Tools, Mail Merge
Mail Merge Helper will now appear on your screen
1. Main Document
Click on the create button and click on mailing labels, now click on the active window button
2. Get Data



Click on the open data source button, click on the yellow folder with the bent up arrow, ‘Look in’ should say C:
Make sure files of type: says All Files *.*, if you need to change it click on the down arrow and select All Files *.*
Now double click on the VetCare folder
then double click on the letters folder
and double click on vclist.doc
finally click on the set up main document button
Label options will now appear
Select the correct label size etc, then click on the Ok button
The create labels box will appear
Click on the insert merge field button and select the fields for your label, once you have the label how you want it to look click on the Ok button.
3. Merge the data with the document
Click on the merge button
The merge box will now appear,
Click on the Merge button and your labels will be ready for you to print
If you wish to print labels again at a later date save document 1 in the VetCare letters folder, so next time when you are asked if you want to use an existing form letter you would say yes

Printing a Label
This is where you can print miscellaneous labels, or if your printer jams and you wish to make another label.
From the main menu, click on the label button on the top button menu bar, (or hold down the Alt key on your keyboard and press B).



Type your label details in the box, then change the quantity if necessary, then click on print.

Saving & Converting Microsoft Word Reminder Letters To VetCare
Open Microsoft Word and open your reminder letter
Now click on File, Save As,
Save In: Letters (*Save all letters in VetCare Letters Directory*)
File Name: make the file name no more than eight characters with no spaces
Save as type: click on the down arrow and select, Rich Text Format (*.rtf)
Now click on save.
Close Microsoft Word and open VetCare, from the main menu, click on Options, Setup, Documents.
This will bring you to the VetCare Document Editor Screen. Click on Open
Look in: Notes (*look in will say notes, click on the folder with the bent up arrow on it, now Look in should say VetCare, double click on the letters folder listed below and then double click on your letter listed below*)
Your letter will now be showing on the screen. You can now make any alterations, you need to delete the fields in the letter and reinsert them by clicking on the right mouse button and clicking on insert field and select the fields you want, once you have finished click on the Save button, then click on File, Exit.

Main Menu Screen
From the MAIN MENU
Choose an item from one of the menus or click a button on the tool bar. You can access the menu items with the mouse or by holding down the "Alt" key and pressing the underlined character in the menu heading.
If you move your mouse so it is pointing to any button, (do not click the mouse) and leave it still it will tell you what the button is for.

Changing the View of your Client List
From the MAIN MENU
There are many client fields you can choose to view or not to view from the main menu. If you make changes to this area they will be saved automatically.
You can choose from:
Last Name, Title, First Name, Address, Address 2, Suburb, Post Code, Home Phone, Work Phone, Fax, Balance, Payment Method, Referred By, Status, Company and Client Id.
Close the fields you do not wish to view by pointing the mouse on the vertical line on the right hand side of the heading until you get an arrow pointing left and right. Now hold down the mouse button and move the mouse to the left so the column gets smaller, do not close it all the way up, leave a very small space or your setting will not be saved, when you have the line were you want it to be let go of the mouse button.

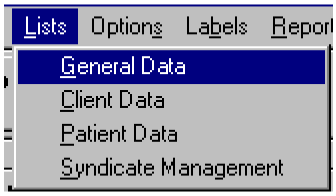
Search Options
From the MAIN MENU You can search by Client or by Patient
To search by last name, click in the Search By Last Name box at the bottom of the screen and start typing the client's last name until the arrow is pointing to the correct client in the list. To search by patient name, click in the Search By Last Name box at the bottom of the screen, then click on the List By Patient button on the bottom left of the screen, (or hold down the Alt key and press P) and start typing the patient's name until the arrow is pointing to the correct patient in the list. You can also search by the headings in the client list, click on any heading and it will sort them alphabetically or numerically and if you click that same heading again it will reverse the sort order.

Creating a Miscellaneous Charge in a Consultation

Once you have opened a client and patient file and started a new consultation you can select miscellaneous procedures.
Click on the miscellaneous charges button 

on the bottom of the screen, (or press F4 on your keyboard).
The cursor will be flashing in the text box. Start typing the name of the miscellaneous item, you can select a category from the drop down menu if you wish. Now click in the price box and type in the amount you wish to charge and click on select, your miscellaneous item will appear in the box below.
If you wish to charge for another miscellaneous item, repeat the above steps, if you have finished click on exit.

Pathology



Deleting Path Tests from List

From the Main Menu
Click on Lists, General Data
Click on the Path' Tests tab
If you wish to delete a pathology test from the list, click on the test you wish to delete, then click on the black arrow to the left of this row so the whole line is highlighted, now click on the delete button on your keyboard.
Click on File, then click on Exit.

Entering Pathology Results

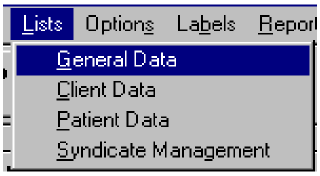
To enter pathology results you need to be at the consultation screen. Make sure you have the consultation showing that you wish to enter the pathology result for, the consultation status on the bottom of the consultation card needs to be open, if it is closed click on the edit consultation button,  so it changes to open.

Click on the pathology tab in the patient details section, now click on the blank line in the test column. A drop down arrow will appear, click on the arrow and then double click on the test you wish to select. It will now fill the line and the cursor will be flashing in the result column for you to type in the result, once you have done this, click on the blank row below for your result to be saved.
If you have further test results to enter, click on the blank row below in the test column and continue as above.
If your result is outside the set min and max range a message will appear to warn you. Result out of Range, click on the OK button, and a * will now appear next to that result to flag it.
Once you have finished you can save the consultation.

Setting Up Pathology Tests

From the Main Menu, Click on Lists, General Data, Click on the Path' Tests tab
This is where you set up any pathology tests so they appear in the pathology list within a consultation.
To create a test, click on the blank row in the test column next to the * in the grey section on the left, your cursor will now be flashing, type in your test name e.g.: RBC, you will notice the * will move down to the next line and a pencil will appear next to RBC, this means we are editing, now click in the description column and type in the description

eg: Red Blood Cells, now click in the Min column and type in the minimum normal range e.g.: 4.9, then click in the Max column and type in the maximum normal range e.g.: 8.2, then click in the Units column and type in the unit e.g.: 10^12/L, then click in the Species column and type in the species e.g.: Dog, now you need to click on the blank row below with the * next to it so that your information you entered will be saved and the pencil will no longer be showing.
Continue as above until you have created all test results needed, then click on File, then click on Exit.



Adding to Patient Reminder List

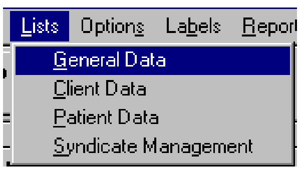
1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Patient Reminders heading

In the Reminder list, click in the first empty row next to the star symbol.
Type in the name of the new reminder e.g.: Blood Test, as you start typing the star will change to a pencil.
Now go to the next section period, this is were you set the standard reminder period for your new reminder, you can choose either Years, Months or Weeks, click in the box next to one of these and type in the appropriate amount e.g.: 6 Weeks.
Now go back to the reminder list and click on the next blank row, once the pencil has gone your new reminder is automatically saved.
If you wish to make another new patient reminder, click in the Reminder list, on the first empty row next to the star symbol and repeat the above steps.
If you have finished creating new reminders click on File and then click on Exit, this allows VetCare to refresh your Patient Reminders List.
You can now attach these new reminders to Professional Fees and Products. To do this click on Lists, General Data, then click on the Professional Fees tab or Products tab. Once you have the fee or product showing that you wish to attach a new reminder to, click on the down arrow on the Reminder box and select your new reminder, now click on Save.

Deleting from Patient Reminder List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Patient Reminders heading

In the Reminders list, click on the reminder you wish to delete, the reminder name will now be highlighted, now click on the arrow next to the reminder name, this will highlight the whole row, now press the delete key on your keyboard and the reminder will be deleted
If you wish to delete another patient reminder, click in the Reminder list, on the reminder you wish to delete and repeat the above steps.
If you are finished click on File and then click on Exit.



Editing Patient Reminder List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Patient Reminders heading

If you wish to change a reminder name, in the Reminders list, click on the reminder you wish to alter the name of, the pencil will appear next to the

patient reminder name once you start to change the name, once you have finished click on the next blank row in the reminder list , once the pencil has gone your new alterations have been automatically saved.
If you wish to change the period settings, first click in the reminder list on the reminder you wish to alter the period for. Click in the appropriate period box and make your changes, once you have finished click on the next blank row in the reminder list, your changes will be saved automatically, if you are only changing the period the pencil does not appear.
If you wish to edit another patient reminder, click in the Reminder list, on the reminder you wish to edit and repeat the above steps.

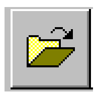
Creating a New Patient
If you are at the main menu you get to the new patient screen by clicking in the Search By Last Name box and

start typing the last name of the client until the arrow is pointing to the correct client, then click on the Create A New Patient File For button on the

bottom right of the screen, (or hold down the Alt key on your keyboard and press W).
If you have already opened a client file and are at the consultation screen, you get to the new patient screen by clicking on File, then click on New Patient, or click on the Create A New Patient

button on the top button menu bar (or hold down the Alt key on your keyboard and press W).
Enter the new patient's details.
You must at least enter a patient name, select a species and a breed from the drop down lists.
If you do not put in a date of birth VetCare will put in today's date.
You can either put the date of birth in e.g.: 13/03/95 or you can type in how many years and months or weeks and days e.g.:
Yrs 5 Mths 4
Weeks 3 Dys 2
Vaccination
Last Vaccination, type in the date they were last vaccinated e.g.: 13/3/98, then click on the down arrow and select the vaccine they had e.g.: DHPPi & L
Next Vaccination, type in the date their next vaccination is due e.g.: 13/3/99, then click on the down arrow and select the vaccine they will receive e.g.: DHPPi & L
If this new patient is not vaccinated and the client chooses never to vaccinate or if it is for example a bird and does not need vaccinating just tab past the vaccination section and VetCare will automatically enter today's date in both date fields and will put NO in the next vaccine field, this flags it so when you do your vaccination reminders they will be excluded.
Once you have finished entering the patients details, click on the Save button.
Your new patient details have been saved and the new patient screen will be blank ready for you to enter another new patient if you wish, if you do not wish to create another patient click on the Done button this will take you directly to the Consultation Screen or click on the Exit button to return to the main menu.

Opening a Patient file



From the main menu, open a client file.
Click on File, then click on Open Patient File, or click on the Open A Patient File Button on the top button menu bar, (or hold down the Alt key on your keyboard and press O). A list of patients will drop down, double click on the patient you want, or click on the patient once and press enter on your keyboard. Your Patient will now be loaded.

Merging Patients

If you have one patient that has a file under two different clients, you can merge them into one by doing the following.

From the Main Menu

(*As an example only I will refer to the patient as Spot and he is listed twice, once under Johnson and once under Hamlin, I am going to merge the two Spot's and I want Spot to be listed as belonging to Hamlin*.)

Click on the List by Patient button on the bottom left of the screen, the search box will now say search by patient, start typing in the name of the patient e.g.: Spot, until the patient is highlighted in the list, (you need the patient e.g.: Spot with the client you no longer want the patient to be listed under e.g.: Johnson highlighted) now click your right mouse button, now click on merge with another patient, now click on the patient and client in the list you wish the patient to be listed under eg: Spot Hamlin, now click your right mouse button, now click on merge with another patient.

A message will appear

Are you sure you want to delete the patient e.g.: Spot Johnson and transfer their consults to e.g.: Spot Hamlin

Yes/No? Type in Yes and then click on the OK button.

Your patient's have now been merged, if you would like to check that it worked ok, click on the list by patient button on the bottom left of the screen and type in the patients name e.g.: Spot, until it is highlighted in the list, you will now see the last name is e.g.: Hamlin and Spot will no longer be showing under Johnson.

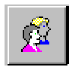
Transferring Patients

When transferring a patient from one client to another the patient and all its history will be transferred.

From the Main Menu

(*As an example only I will refer to the patient as Spot and I will be transferring him from Jim Johnson to Harry Hamlin*)

Click on the List by Patient button on the bottom left of the screen, the search box will now say search by patient, start typing in the name of the patient you wish to transfer to another client e.g.: Spot, until the patient is highlighted in the list, now click your right mouse button, now click on transfer to new owner, now click on the list by client button on the bottom left of the screen, the search box will now say search by last name, start typing in the last name of the client you wish to transfer this patient to eg: Hamlin, until it is highlighted in the list, now click your right mouse button, now click on accept transferred patient.



A message will appear

Are you sure you want to transfer ownership of e.g.: Spot Johnson to Harry Hamlin Yes/No?

Type in Yes and click on the OK button.

Your patient has now been transferred, if you would like to check that it worked ok, click on the list by patient button on the bottom left of the screen and type in the patients name e.g.: Spot, until it is highlighted in the list, you will now see the last name is e.g.: Hamlin the new owner.

Euthanasing a Patient
If you charge out a professional fee which has a category of "Euthanasia" VetCare automatically appends "(DECEASED)" to the end of the patient's name. Once a patient has been euthanased they will no longer receive vaccination reminders.
If a client informs you that a patient has died then you can edit the patient's details and manually append "(DECEASED)" to the end of the patient's name.
IMPORTANT! You must include the brackets.
E.g.: Fluffy(DECEASED)

Changing Patient Location
You can change the location of a patient from within a consultation. The consultation needs to be open, just before you save the consultation, click on the down arrow next to location at the bottom right of the consultation card, 

click on the location you wish to send this patient e.g. hospital post op cage 3 etc, once you have done this then save the consultation.
When you go to the unfinalised consultation list this patient's location will show the location you selected.
By default VetCare will show the computers name that is accessing the file as the location e.g.: waiting room, consult room 1 etc, when you save a consultation, VetCare will by default select waiting room or the name of the computer in the waiting room as the location as the majority of patients come in and go home straight away.
Each time you edit a consultation if the patient is not going home make sure you select the correct location before saving.
To add to the location list look in the manual under Rooms (Patient Location) - Adding to Room List

Adding to Payment Method List
1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Payment Method heading

In the Payment Method list, click in the first empty row next to the star symbol.
Type in the new payment method, as you start typing the star will change to a pencil.
Now click on the next blank row, once the pencil has gone your new payment method is automatically saved.
If you wish to make another new payment method, click on the first empty row next to the star symbol and repeat the above steps.
If you are finished click on File and then click on Exit.

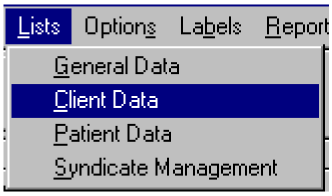
Deleting from Payment Method List
1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Payment Method heading

In the Payment Method list, click on the payment method you wish to delete. The payment method will now be highlighted, now click on the arrow next to the payment method, this will highlight the whole row, now press the delete key on your keyboard and the payment method will be deleted
If you wish to delete another payment method, click in the payment method list, on the payment method you wish to delete and repeat the above steps.

If you are finished click on File and then click on Exit.

Editing Payment Method List

1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Payment Method heading



If you wish to change a payment method in the payment method list, click on the payment method you wish to alter. The pencil will appear next to the payment method once you start to change the name, once you have finished click on the next blank row in the payment method list, once the pencil has gone your new alterations have been automatically saved. If you wish to edit another payment method, click in the payment method list, on the payment method you wish to edit and repeat the above steps.
If you are finished click on File and then click on Exit.

Creating a Phone Reminder

From the Main Menu, click on Phone Reminders from the top menu bar, or click on the Phone Reminders Button on the top button  menu bar, (or hold down the Alt key on your keyboard and press M).
A General Reminder would be for something like a Golf Day you may have planned or your Wedding Anniversary or maybe a Hair Cut Appointment etc.
To create this reminder click on the New button.
Click in the Reminder Text Box and type in your message e.g.: Hair Appointment 11:30am, to select the correct date, click on either the Day, Week, Month or Year buttons, the left mouse button will take you forwards and the right mouse button will take you backwards.
Once you have the correct date click on the Save button.
You may not be able to see your new appointment in the listing, as only Due appointments will be showing. To check you will see on the bottom of the screen the Show Section, if you click in the circle next to All so a dot appears, you will now see all appointments.
If you wish to make further appointments, click on new and repeat the above steps.
If you have finished, click on File and then click on Exit.

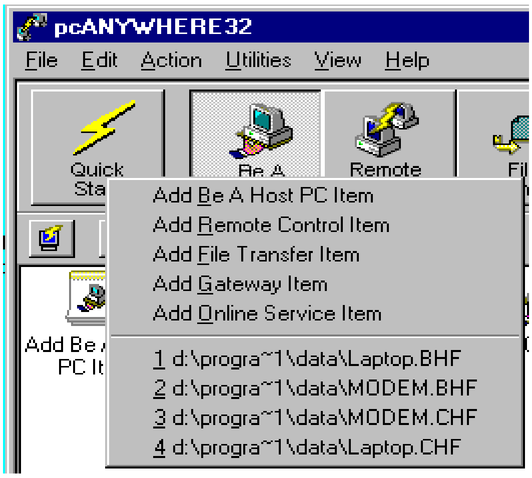
Deleting a Phone Reminder

From the Main Menu, click on Phone Reminders from the top menu bar, or click on the Phone Reminders Button on the top button menu bar,  (or hold down the Alt key on your keyboard and press M).

Click on the reminder you wish to delete in the list and then click on the Delete button.
Once you have finished deleting reminders click on File, then click on Exit.

To Set Up a Host or Remote Item

Go to the Start  button.

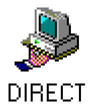


Go to Programs and pcANYWHERE 32.
Once in this program click the Quick Start button and select the appropriate item. You will be talked through the setup by pcANYWHERE 32.

To wait for a call

On the host PC:
1. Click Be A Host PC on the action bar.

2. Double-click the host connection item for the host you want to launch e.g.

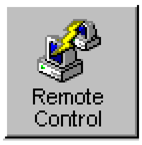


It will say initialising and then waiting for connection.

To call a host PC

On the Remote PC:

1. Click Remote Control on the action bar.



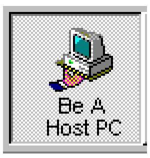
2. Double-click the remote PC connection item to call the host PC you want e.g.

3. You may be promted for the following:
   - If your connection item does not include the name of the host PC for a modem connection, you are promted to type a number.
   - If your connection itme does not include the name of the host PC for a network connection, a list of network hosts displays, allowing you to choose a host.

To call a remote PC

On the host PC:

1. Click BeA Host PC on the action bar.



2. Right-click the host connection item.

3. Choose call Remote from the context menu.

Adding to Product List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Products heading

(*Before creating any products under the Products heading - make sure you have been in and created all your categories under the Fee/Product Categories heading and added your suppliers and their details under the Suppliers heading and created any reminders under the Patient Reminders heading, as you may need to select them as we proceed*).

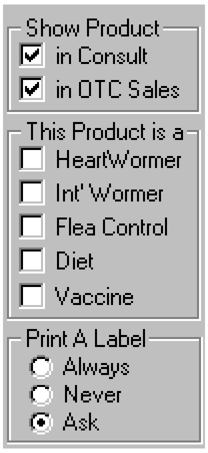
Click on the New button. 

Click in the Description box, type in the name of your new product.
Now click on the down arrow in the far right hand side of the Category box, this will drop down a list of all the categories you have created. Click on the category you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*).
If you wish to put in an Item Code, click in the item code box and type in your number (*this could be a bar code or your own product number, you can leave this field blank if you do not wish to use item codes*).
Now click on the down arrow in the far right hand side of the Supplier box, this will drop down a list of all the suppliers you have created. Click on the supplier you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*).
APPLY AUTOMATIC DISCOUNT - If you wish this product to be discount sensitive click in the box so a tick appears. Discount sensitive means that if the client has a discount % set, when selecting this product from within a consultation, the price will show in red in the discounted price box, (*you can over ride this price within a consultation if you want by typing in a temporary price*). Discounted prices will only show if the client has been given a discount % otherwise the standard list prices will be showing.

Now click in the Pack Quantity box and type in the pack quantity e.g.:
For a bottle of shampoo the pack quantity would be 1.
For a bottle of tablets containing 500 tablets that will be sold individually the pack quantity would be 500.
Now click in the Pack Cost Price and type in the pack cost price e.g.:
If the bottle of shampoo cost $12.00 you would type 12.00 in the pack cost price box.
If the bottle of tablets containing 500 tablets cost $45.00 you would type 45.00 in the pack cost price box.
Now click in the Mark Up % box and type in the % you wish to mark up this product e.g.: for 50 % you would just type in 50 and then click on the Apply button. You must have a pack cost price for the mark up % to work.

If you have typed in a pack cost price and a mark up %, the unit sell price will automatically be worked out and appear in the unit sell price box.
If you do not wish to put in a mark up % you can just type in a unit sell price.
Now click in the Dispensing Fee box and type in a dispensing fee if applicable.
Tax Rate - Only type in a tax rate if you are in a country that has tax applicable on this item e.g.: GST
Now click in the Qty On Hand box and type in the quantity on hand.
Now click in the Reorder Level box and type in the minimum quantity you want in stock before reordering.
Now click in the Maximum Holding box and type in the maximum quantity you want to hold in stock.

The next section is Show Product:



The first box is - In Consult
This is the list you would select for all drugs eg: S4 drugs. If you want this product to appear in the consult list click in the box so a tick appears.
The next box is - In OTC Sales
This is the list you would select for any items sold over the counter, eg: collars, pet food etc. If you want this product to appear in the OTC Sales list click in the box so a tick appears.
Products can appear in both list if you wish, just make sure there is a tick in both boxes if this is the case.

The next section is This Product Is A:

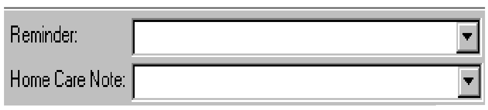
The first box is for HeartWormer, if this product is a heartwormer product make sure a tick appears in the box next to the word HeartWormer so that when you sell this product from a consultation this heartwormer will automatically appear in the patient details.
The same applies for the next three boxes, Int Wormer (Intestinal Wormer), Flea Control and Diet, just click on the appropriate box so a tick appears. If the product is none of the above make sure there are no ticks in the boxes, to remove a tick click your mouse on the tick.
If this product is a Vaccine, look in the help file under the following: Subject: Vaccine
Topic: Adding to Vaccine List

The next section is Print A Label.

The first circle is Always, make sure a black dot appears in the circle next to the word always if you always want a label printed automatically.
The next circle is Never, make sure a black dot appears in the circle next to the word never if you never want a label printed.
The next circle is Ask, make sure a black dot appears in the circle next to the word ask if you wish to be asked if you want a label, you will then be given the option of selecting yes or no.
You can only have one option selected in this section for each product. To select an option click on the circle next to the one you require.

The next section is Reminder.

If you wish to have a reminder attached to this product click on the down arrow in the far right hand side of the reminder box, this will drop down a list of all the reminders you have created. Click on the reminder you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*). If you do not require a reminder to be attached to this product just go on to the next section.



The next box is the Home Care Notes box (*only complete this section if you wish to have a Home Care*

Note automatically print when you select this product within a consultation). If you wish to select a Home Care Note for this product click on the down arrow in the far right hand side of the Home Care Note box, this will drop down a list of all the Home Care Notes you have created. Click on the one you want.

The next section is the Qty and Regime area.

This is where you can set up to four standard regimes for each product.

Click in the Regime 1 box and type in exactly what you want to appear on the label e.g.: Give one tablet twice daily for five days.

Then click in the Quantity box to the left of regime box 1 and type in the correct quantity for that regime e.g.: 10

IMPORTANT - All products need to at least have Regime 1 box and its Quantity box filled in for example if you wish to have the quantity box as 1 and do not need a label just type a 1 in the Regime 1 box as well as it needs to have text in it even if it is just one character. (*Or you may prefer to type in for e.g.: As Directed*)

Now click in Regime 2 box and follow the same steps for the next three regimes if required.

Once you have finished in the quantity and regime area click on the save button.

If you have further products to create, click on the new button and repeat the above steps.

If you have finished click on File and then click on Exit.

Deleting from Product List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Products heading

Click in the enter search text box, start typing the name of the product you wish to delete until it appears in the Description box (*you can also use the left and right arrows on either side of the enter search text box to find the product you wish to delete*).

Now click on the Delete button.

A WARNING will appear

Are You Sure You Want To Delete This Product?

Y/N

You have to type in the box below Y and click on the OK button.

If you wish to delete a further product, click in the enter search text box and start typing the name of the product you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.

Editing Product List

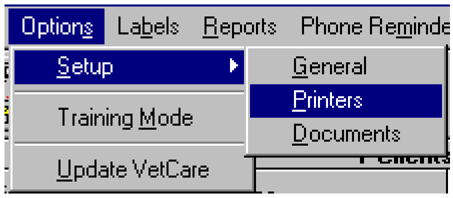
1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Products heading

Click in the Enter Search Text box, start typing the name of the product you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the product you wish to edit*). Once you can see the product in the description box, click in the boxes you wish to change one at a time and make your alterations, once you are happy with the changes, click on the Save button.

If you wish to edit another product, click in the enter search text box and start typing the name of the product you wish to edit and repeat the above steps.

If you are finished, click on File and then click on Exit.

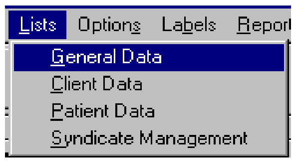
Printer Settings and Document Layout



1. From the MAIN MENU click on OPTIONS
2. Click on SETUP
3. Click on PRINTERS

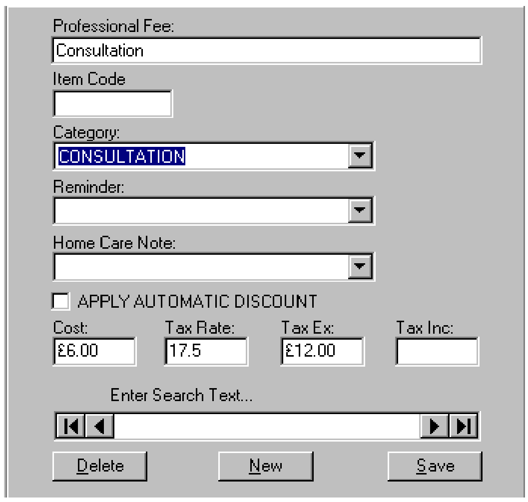
This is where you set up which forms go to which printer and how you want the layout to appear.
Click on the first heading Invoices/Statements.
The first section is Printer, click on the down arrow on the right hand side of the printer box, scroll up and down until you find the correct printer and click on it.
The next section is Header, Body and Footer, you need to make sure you have a Font showing in the font box and a Size showing in the size box for header, body and footer.
To change the font click on the Change Font boxes one at a time and make changes.
(*For the body - select Courier or Courier New as the font so your monetary values line up correctly in their columns*)
The next section is Left Margin, click in the box to change the margin.
The next section is the layout area for your Header and Footer.
If you wish to have a header or a footer showing, click in the box next to Print Header and or Print Footer so a tick appears in the box, you can also put a tick in Centre Header or Footer if you want them centred.
Click in the large box under printer header and type in the header information, you have up to 6 lines, do the same for the footer if you wish.
You need to click on each of the different headings e.g.: Receipts, Reports, etc and repeat the above steps.
Once you have finished, click on File, then click on Exit.

Adding to Professional Fee List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Professional Fees heading

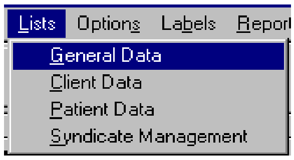
(*Before creating any procedures under the Professional Fees heading - make sure you have been in and created all your categories under the Fee/ Product Categories heading and any reminders under the Patient Reminders headings, as you may need to select them as we proceed*).



Click on the New button, the cursor will be flashing in the Procedure box, type in the name of the new procedure.
Now click on the down arrow in the far right hand side of the Category box, this will drop down a list of all the categories you have created.
Click on the category you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*).
The next box is the Reminder box (*only complete this section if you wish to set a Reminder against this procedure*). If you wish to set a reminder click on the down arrow in the far right hand side

of the Reminder box, this will drop down a list of all the reminders you have created. Click on the reminder you want.
The next box is the Home Care Notes box (*only complete this section if you wish to have a Home Care Note automatically print when you select this procedure within a consultation*), If you wish to select a Home Care Note for this procedure click on the down arrow in the far right hand side of the Home Care Note box. This will drop down a list of all the Home Care Notes you have created. Click on the one you want.
Now click in the Cost box. Highlight the amount showing and type in your cost price or just click in the box and edit the amount showing, (*you do not have to put in a cost price, you can just skip this step and go on to the Price if you wish, keep in mind you may find cost useful when you get to the stage of running off various reports*)
Now click in the Price box. Highlight the amount showing and type in your cost price or just click in the box and edit the amount showing.
Click on the Save button.
If you wish to make any further professional fees, click on the new button and repeat the above steps.
If you are finished click on File and then click on Exit

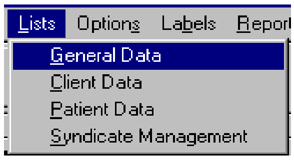
Deleting from Professional Fee List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Professional Fees heading

Click in the Enter Search Text box. Start typing the name of the procedure you wish to delete (*you can also use the left and right arrows on either side of the enter search text box to find the procedure you wish to delete*), once you can see the procedure in the procedure box, click on the Delete button.
A WARNING will appear
Are You Sure You Want To Delete This Procedure?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further procedure, click in the enter search text box and start typing the name of the procedure you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

Editing Professional Fee List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Professional Fees heading

Click in the Enter Search Text box. Start typing the name of the procedure you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the procedure you wish to edit*). Once you can see the procedure in the procedure box, click in the boxes you wish to change one at a time and make your alterations, once you are happy with the changes, click on the Save button.
If you wish to edit another procedure, click in the enter search text box and start typing the name of the procedure you wish to edit and repeat the above steps.
If you are finished, click on File and then click on Exit.

Selecting Professional Fees within a consultation

Once you have opened a client and patient file and started a new consultation you can select professional fees.

Click on the profession fees button on the bottom of the screen, (or press F3 on your keyboard).

The cursor will be flashing in the enter search text box. Start typing the name of the professional fee until it is highlighted in the list, now press enter on your keyboard, or once highlighted you can click on the select button. As you select professional fees a list will appear in the box on the left, when you have finished click on exit.

(*If you wish to charge a temporary price, once the fee is highlighted in the list click in the temporary price box and type in your temporary price, then click in the quantity box and type in the quantity, then click on select*).

Creating Quotes

Before you create your first quote you need to create a room called Quotes to do this see: Adding to Room List

Once you have a location called Quotes you can continue.

To create a quote you perform a consultation, then before saving it, click on the down arrow next to location on the bottom of the consultation card and select Quotes, now save the consultation but say no to finalising.

If your client decides to go ahead with the quote you would load it from the unfinalised consultation screen, see: Viewing and Loading Quotes

Once you load the quote, and click on edit it will no longer show the location as quote and you can go ahead and finalise it as a normal consultation.

If you wish to alter the quote and have it still showing as a quote just make sure you select the location quote again before you save it and say no to finalising.

Deleting Quotes

To delete a quote load it from the unfinalised consultation list by clicking on the quote you wish to load then click on the load button.

Now click on the delete button at the bottom of the consultation card it looks like a bin.

A Warning will appear

Are you sure you want to delete this consultation Yes/No?

Type in Yes and click on the Ok button.

The quote has now been deleted.

Viewing and Loading Quotes

From the Main Menu, Click on Reports, Unfinalised Consultations

From the Unfinalised Consultation Screen

To view quotes, click on the down arrow next to the Show box at the bottom of the screen and click on quotes, all quotes will now be showing.

To load a quote, click on the quote you wish to load then click on the load button.

Once you load the quote, and click on edit it will no longer show the location as quote and you can go ahead and finalise it as a normal consultation.

If you wish to alter the quote and have it still showing as a quote just make sure you select the location quote again before you save it and say no to finalising.

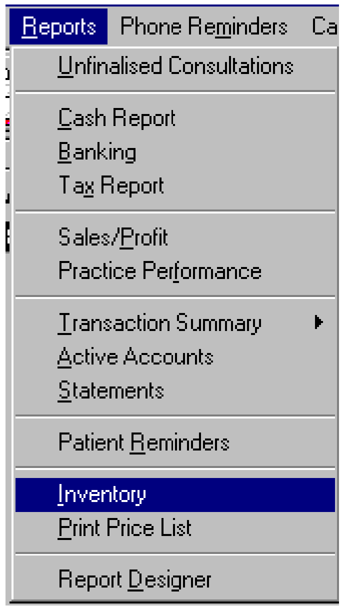
Altering Stock List

From the Main Menu, click on Reports, then click on Inventory. Click on the stock list tab, from here you can make changes to pack cost, pack qty, unit sell and qty on hand.

To make changes click on the value you wish to change and type in your new figure. You will notice a pencil appear at the far left of this line, to accept you changes click on another row in the list and your changes will be saved and the pencil will no longer be showing.

Once you have finished click on File then Exit.

(*You can also make changes to products from within lists, look in the manual under Editing Products List*).



Print Stocktake Sheet

From the Main Menu, click on Reports, the click on Inventory.

Now click on File, then click on print stocktake sheet.

Your stocktake sheet will now print.

Reorder List

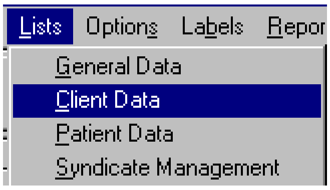
From the Main Menu, click on Reports, then click on Inventory.

Your reorder list will now be showing, it will list all items that have fallen below the reorder level it will also show you the total cost of the reorder.

To print orders, click on File, then click on Print Order List, then either click on for each supplier or combined.

Your order or orders will now print. Check your order then you can fax the order to your supplier or suppliers

Adding to Referral List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Referred By heading

In the 'Referred By list', click in the first empty row next to the star symbol.
Type in the name of the new referral, as you start typing the star will change to a pencil.
Now click on the next blank row, once the pencil has gone your new referral is automatically saved.
If you wish to make another new referral, click on the first empty row next to the star symbol and repeat the above steps.
If you are finished click on File and then click on Exit.

Deleting from Referral List

1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Referred By heading

In the 'Referred By list', click on the referral you wish to delete, the referral name will now be highlighted, now click on the arrow next to the referral name, this will highlight the whole row, now press the delete key on your keyboard and the referral will be deleted
If you wish to delete another referral, click in the referred by list, on the referral you wish to delete and repeat the above steps.
If you are finished click on File and then click on Exit.

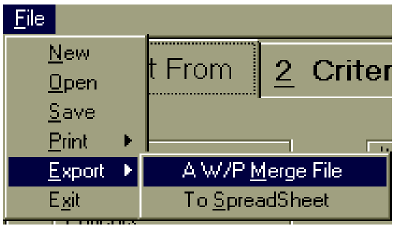
Editing Referral List

1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Referred By heading

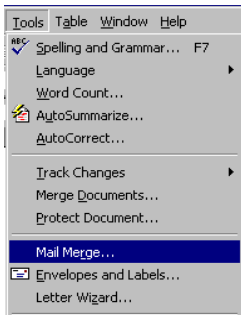
If you wish to change a referral name in the referred by list, click on the referral you wish to alter the name of. The pencil will appear next to the referral name once you start to change the name, once you have finished click on the next blank row in the referred by list, once the pencil has gone your new alterations have been automatically saved.
If you wish to edit another referral name, click in the referred by list, on the referral you wish to edit and repeat the above steps.
If you are finished click on File and then click on Exit.

Merging Data into MSWord

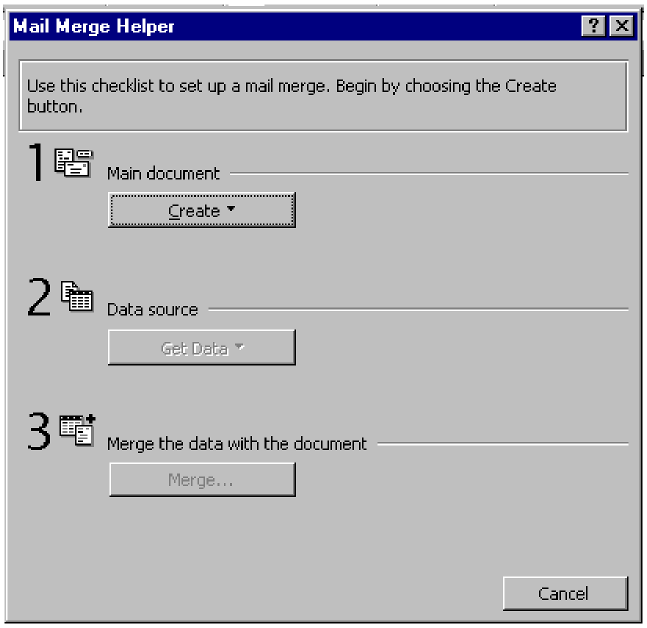
Merging Data from the Report Designer to a Word Processing Program
And Creating A New Form Letter
Make sure your word processing program is not open.
From the Main Menu, click on Reports, Report Designer. Design your report, once you have the results you want listed in the search results below, click on the Select All button, then click on File, Export, A W/P merge File.



A message will appear
Start Word Processor Now?
Click on Yes
Use Existing Form Letter?
Click on No
Microsoft Word will now open
A sample document will be showing, delete the information and design your form letter, click on the Insert Merge Field button to add fields to your document.
Once your document is finished, click on File, Save As,
The Save As window will appear, the save in box will say save in: letters
The file name box will be highlighted ready for you to type in the file name you wish to give this document, type in the name and then click on the Save button.

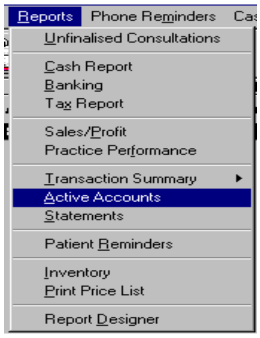


Click on Tools from the top menu bar, then click on Mail Merge, this will open the mail merge helper, you only need to do step 3 by clicking on the Merge button.



A merge box will appear, just click on the Merge button.
You will now have your new merged document ready to print, you have now completed the merge and can print your letters.
If you wish to view the letters before printing just use the scroll bar on the right of the screen to scroll up and down or the page up and page down buttons on your keyboard.

Active Accounts



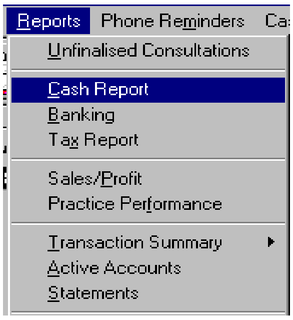
From the Main Menu

Click on Reports, then click on Active Accounts

This screen will show you anyone who owes you money, it will show the clients name and phone number, how much they owe and whether it is 30, 60, 90 days etc, it will also show you when the last payment was made and how much the payment was for.

You can print this list out if you wish by clicking on File, then Print.

Cash Report



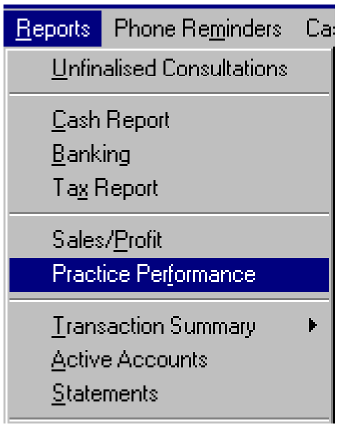
From the Main Menu

Click on Reports, Cash Report

The cash report automatically defaults to today's date, the report will show you any money you received today, whether it was cash, cheque, or credit card, it will also show you totals at the bottom of the screen.

If you wish to view a different date range, change the dates and click on the recalculate button.

Practice Performance Activity



From the Main Menu

Click on Reports, then click on Practice Performance

Click on the activity tab, you will see the following details listed for Active Clients, Active Patients, Transaction Count and Average Transaction Value

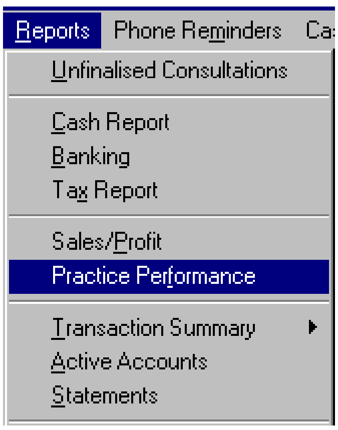
Last Year Moving Annual Total, Moving Annual Total, Var $, Var %, Last Year Year to Date, Year to Date, Var $, Var %, Last Year Month to Date, Month to Date, Var $, Var %

You can change the reference date by clicking on the change button, a calendar will now appear click on the new reference date and the figure below will recalculate.

When you have finished click on File, then click on Exit.

Practice Performance Revenue

From the Main Menu



Click on Reports, then click on Practice Performance

Click on the revenue tab, at the bottom of the screen you will see the following details

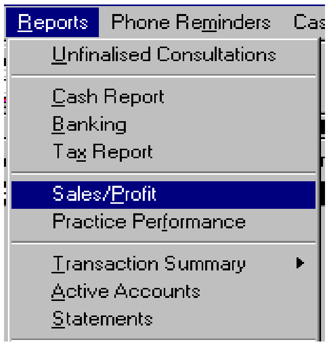
Last Year Moving Annual Total, Moving Annual Total, Var $, Var %, Last Year Year to Date, Year to Date, Var $, Var %, Last Year Month to Date, Month to Date, Var $, Var %

You can change the reference date by clicking on the change button, a calendar will now appear click on the new reference date and the figure below will recalculate.

You can also group by category or product, click on the drop down menu next to the group by box to select.

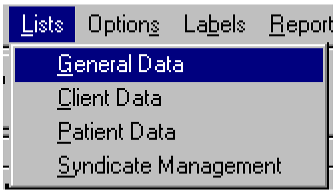
When you have finished click on File, then click on Exit.

Sales/ Profit



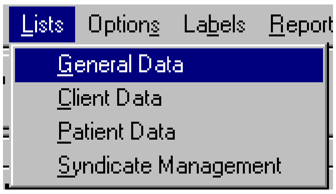
From the Main Menu
Click on Reports, Sales/Profit
The sales/profit report automatically defaults to today's date, the report will show you any business you have written today whether it was an account sale or a cash sale etc, it will also show you totals and averages at the bottom right of the screen. If you wish to view a different date range, change the dates and click on the re-calculate button.

Adding to Room List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Rooms heading

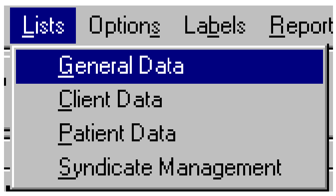
Click on the New button.
Now click in the Room box and type in the name of your new room e.g.: Hospital / Recovery / Post Op Cage 1.
Now click on the Save button.
If you wish to make another new room, click on the New button and repeat the above steps.
If you are finished click on File and then click on Exit.



Deleting from Room List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Rooms heading

Click in the enter search text box, start typing the name of the room you wish to delete until it appears in the room box. (you can also use the left and right arrows on either side of the enter search text box to find the room you wish to delete)
Now click on the Delete button.
A WARNING will appear
Are You Sure You Want To Delete This Room?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further room, click in the enter search text box and start typing the name of the room you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

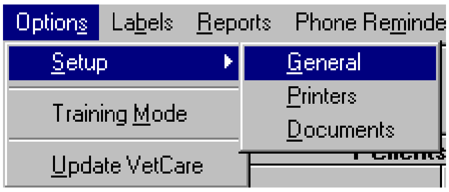


Editing Room List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Rooms heading

Click in the Enter Search Text box, start typing the name of the room you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the room you wish to edit*). Once you can see the room in the room box, click in the room box and make alterations to the room name, once you are happy with the changes, click on the Save button.
If you wish to edit another room name, click in the enter search text box and start typing the name of the room you wish to edit and repeat the above steps.
If you are finished, click on File and then click on Exit.

Creating New Users



From the Main Menu
Click on Options, Setup, General
Now click on the security tab
A message will appear asking you to enter your user name, type in your user name and click on the OK button, now the message will ask for you to enter your password, type in your password and then click on the OK button.
Click on users from the top menu bar, then click on new user.
A message will appear asking you to enter the name, type in the new user name and click on the OK button.
A message will appear asking you to enter the password, type in the password for the new user and click on the OK button.
If you wish to create further new users continue as above.
When you have finished, click on File then click on Exit

Deleting Tasks

From the Main Menu
Click on Options, Setup, General
Now click on the security tab
A message will appear asking you to enter your user name, type in your user name and click on the OK button, now the message will ask for you to enter your password, type in your password and then click on the OK button.
Click on the task in the list you wish to delete, now, click on tasks from the top menu bar, now click on delete task.
A message will appear
Are you sure you want to delete the task
Yes/No?
Type in Yes and click on the OK button
The task will no longer be showing in your task list.
Click on File then click on Exit.

Deleting Users

From the Main Menu
Click on Options, Setup, General
Now click on the security tab
A message will appear asking you to enter your user name, type in your user name and click on the ok button, now the message will ask for you to enter your password, type in your pass-word and then click on the OK button.
Click on the user in the list you wish to delete, now click on users from the top menu bar, now click on delete user.
A message will appear
Are you sure you want to delete the user
Yes/No?
Type in Yes and click on the OK button
This user will no longer be showing in your user list.
Click on File then click on Exit.

IMPORTANT Initial Security Activation

THE PERSON WITH THE HIGHEST LEVEL OF SECURITY SHOULD BE THE ONE TO COMPLETE THE FOLLOWING SETUP - as they will need to put in their password and the passwords for other staff

You can set tasks within VetCare to require levels of security to access them. For example you may not want all staff to be able to delete clients and patient or edit lists within VetCare or be able to perform credits or refunds etc.

What you do is give a task a security level, then you give your staff security clearance levels.

Example of Tasks and Security Clearance Levels

Credits/Refunds Level 1

Delete Clients & Patient Level 2

Edit Lists Level 1

Alter Transactions Level 3

Example of Staff, Passwords and Security Clearance Levels

Name	Password	Level
john	ford	1
mary	spider	2
peter	yellow	3

In the above example John is the Principal and I have given him security level 1 which is the highest security level giving him access to all tasks including being able to alter the security setup (*Only Level 1 can alter the security setup*).

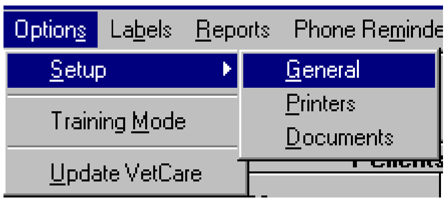
In the above example Mary has been given security level 2, she will have access to deleting clients and patients, altering transactions but not to credits and refunds or editing lists.

In the above example Peter has been give security level 3, he will have access to altering transactions but not credits and refunds, deleting clients and patients or editing lists.

From the Main Menu

Click on Options, Setup, General

Click on the Security tab



IMPORTANT - The first time you go into security you need to enter the person with the highest security level first, so that you will be able to get back in to make further changes.

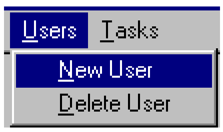
A message will appear

Enter your user password

You can type anything in here the first time you come into security eg: type vet and click on the OK button.

You will now be at the security settings screen.

As you are the person to have the highest level of security you need to set your clearance level first to do this, click on Users from the top menu bar, then click on New User.



A message will appear

Enter your user name

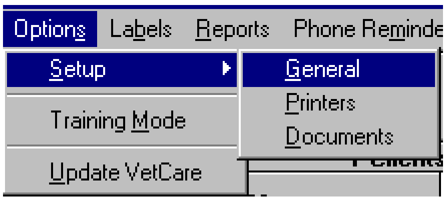
This is where you type in your name and then you click on the OK button.

(*Security is case sensitive so make sure you remember exactly how you type in your name e.g.: if you type in John, you must enter it that way in future, JOHN will not give you access neither would john it needs to be typed in exactly as you enter it now*)

Type in your user name and then click on the OK button.

A message will appear
Enter your password
This is where you type in your password and then you click on the OK button. (*Security is case sensitive so make sure you remember exactly how you type in your password e.g.: if you type in Bourbon, you must enter it that way in future, BURBON will not give you access neither would bourbon it needs to be typed in exactly as you enter it now*)
A message will appear
Enter clearance level
As you are the person to have the highest level of password you need to type in 1 and press the OK button.
(*You may only want yourself to be level 1 as level 1 gives you access to make changes to the security setup and from within this setup area you can see everyone's passwords*)
Now that you have set up your security level you can give Tasks and Users security clearance levels

Setting Task Security Levels



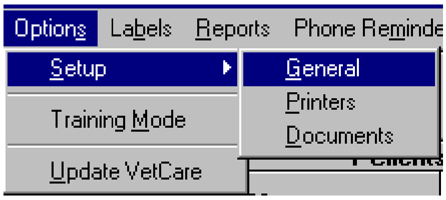
From the Main Menu, click on Options, Setup, General
Now click on the security tab
A message will appear asking you to enter your user name, type in your user name and click on the OK button, now the message will ask for you to enter your password, type in your password and then click on the OK button.
Click on tasks from the top menu bar, now click on new task, click on the task you wish to set a security level for.
A message will appear asking you to enter the security clearance level, type in the level you wish to give to this task and then click on the OK button.
If you wish to set security levels for further tasks continue as above.
When you have finished, click on File then click on Exit

External Program Settings

1. From the MAIN MENU click on OPTIONS
2. Click on SETUP
3. Click on GENERAL
4. Click on the External Programs heading

This is were you set up the path for VetCare to find your word processing program and your spreadsheet program if you are using one.
If you need to change these settings, click on the change buttons one at a time and select the correct path.
When you are finished click on File and then click on Exit.

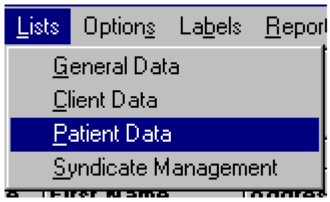
Network Settings



1. From the MAIN MENU click on OPTIONS
2. Click on SETUP
3. Click on GENERAL
4. Click on the Network heading

The first section is This Computer Is A.
This is where you let VetCare know if this computer is a server or a workstation.
If you have the Stand Alone Version of VetCare you would select server by clicking in the circle next to server so a black dot appears.
If you have the Network Version of VetCare you need to set the front reception computer as the server and any other computers in the practice as workstations.
The next section is This Computer's Name is.
This is were you give the computer a name e.g.: Reception or Waiting Room, Consult Room 1, Consult Room 2 etc.
The next section is Data Base Location.
If you have the Stand Alone Version of VetCare your settings should be as follows:
Live DataBase should be C:\vetcare\vetcare.mdb
Training DataBase should be C:\vetcare\training.mdb
Charts Directory should be C:\vetcare\charts
Templates Directory should be C:\vetcare\templates
If you have the Network Version of VetCare, drive mapping will need to be done, your hardware person will set this up when they are networking your computers.
When you are finished click on File and then click on Exit.

Adding to Species List



1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Species heading

Click on the New button.
Now click in the Species box and type in the new species.
Now click on the Save button.
If you wish to make another new species, click on the New button and repeat the above steps.
If you are finished click on File and then click on Exit.

Deleting from Species List

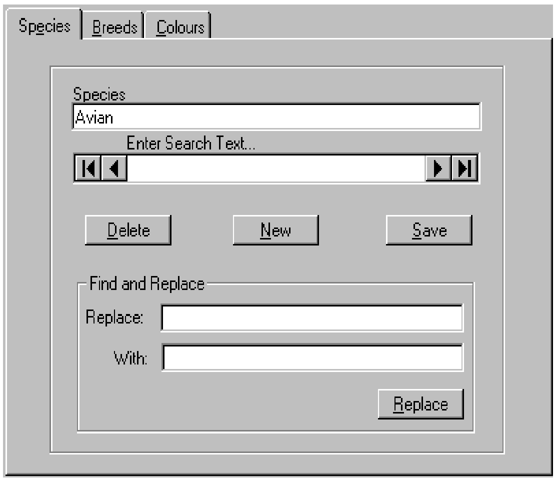
1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Species heading

Click in the enter search text box, start typing the name of the Species you wish to delete until it appears in the species box. (*you can also use the left and right arrows on either side of the enter search text box to find the species you wish to delete*)
Now click on the Delete button.
A WARNING will appear
Are You Sure You Want To Delete This Species?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further species, click in the enter search text box and start typing the name of the species you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.

Editing Species List

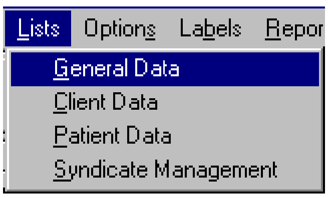
1. From the MAIN MENU click on Lists
2. Click on PATIENT DATA
3. Click on the Species heading



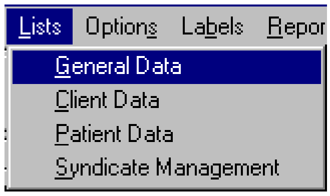
Click in the Enter SearchText box. Start typing the name of the Species you wish to Edit (*you can also use the left and right arrows on either side of the enter search text box to find the species you wish to edit*). Once you see this species appear in the species box, click in the species box and alter the name, then click on the Save button.
If you wish to edit another species, click in the enter search text box and start typing the name of the species you wish to edit and repeat the above steps.
If you wish to replace a species with something else e.g.: you may want to change cat to feline, go to the next section Find and Replace.
Click in the replace box and type the name of the species you wish to replace e.g.: cat.
Now click in the With box and type the replacement species name e.g.: feline.
Now click on the Replace button.
A window will appear letting you know how many replacements were made, click on OK.
If you wish to replace another species, click in the replace box and start typing the name of the species you wish to replace and repeat the above steps.
If you are finished, click on File and then click on Exit.

Adding to Staff List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Staff heading



Click on the New button.
Now click in the Name box and type in the name of your new vet or staff member.
Now click in the Title box and type in the Vets title, or if it is a staff member other than a vet either type in their position e.g.: Vet Nurse or you can leave it blank.
Now click on the Save button.
If you wish to make another new vet or staff member, click on the New button and repeat the above steps.
If you are finished click on File and then click on Exit.



Deleting from Staff List

1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Staff heading

Click in the enter search text box, start typing the name of the vet or staff member you wish to delete until it appears in the name box. (*you can also use the left and right arrows on either side of the enter search text box to find the person you wish to delete*)

Now click on the Delete button.

A WARNING will appear

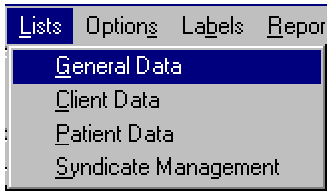
Are You Sure You Want To Delete This Vet?

Y/N

You have to type in the box below Y and click on the OK button.

If you wish to delete a further vet or staff member, click in the enter search text box and start typing the name of the person you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.



Editing Staff List

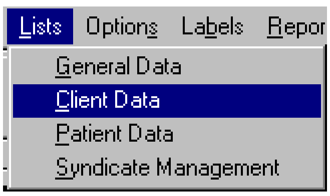
1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Staff heading

Click in the Enter Search Text box. Start typing the name of the vet or staff member you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the person you wish to edit*). Once you can see the vet or staff member in the name box, click in the boxes you wish to change one at a time and make your alterations, once you are happy with the changes, click on the Save button.

If you wish to edit another vet or staff member, click in the enter search text box and start typing the name of the person you wish to edit and repeat the above steps.

If you are finished, click on File and then click on Exit.

Adding to Status List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Status heading

Click on the New button.

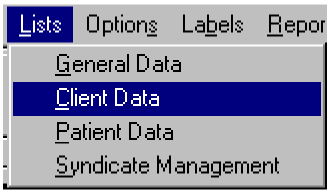
Now click in the status box and type in the new status.

Now click on the Save button.

If you wish to make another new status, click on the new button and repeat the above steps.

If you are finished click on File and then click on Exit.

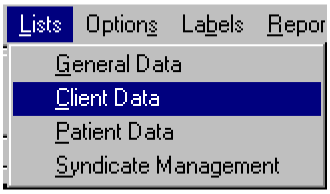
Deleting from Status List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Status heading

Click in the enter search text box, start typing the name of the Status you wish to delete until it appears in the status box. (*you can also use the left and right arrows on either side of the enter search text box to find the status you wish to delete*)
Now click on the Delete button.
A WARNING will appear
Are You Sure You Want To Delete This Status?
Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further status, click in the enter search text box and start typing the name of the status you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

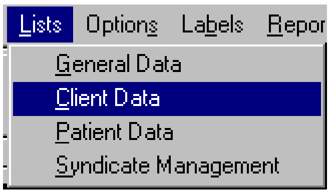
Editing Status List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Status heading

Click in the Enter Search Text box. Start typing the name of the Status you wish to Edit (*you can also use the left and right arrows on either side of the enter search text box to find the status you wish to edit*). Once you see this status appear in the status box, click in the status box and alter the name, then click on the Save button.
If you wish to edit another status, click in the enter search text box and start typing the name of the status you wish to edit and repeat the above steps.
If you are finished, click on File and then click on Exit.

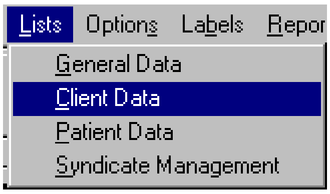
Adding to Suburb/Post Code List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Suburbs/Post Codes heading

Click on the New button.
Now click in the Suburb box and type in the name of the new suburb.
Now click in the Post Code box and type in the post code for this suburb.
Now click on the Save button.
If you wish to make another new suburb, click on the New button and repeat the above steps.
If you are finished click on File and then click on Exit

Deleting from Suburb/ Post Code List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Suburbs/Post Codes heading

Click in the enter search text box, start typing the name of the suburb you wish to delete until it appears in the suburb box. (*you can also use the left and right arrows on either side of the enter search text box to find the suburb you wish to delete*)

Now click on the Delete button.

A WARNING will appear

Are You Sure You Want To Delete This Suburb?

Y/N

You have to type in the box below Y and click on the OK button.

If you wish to delete a further suburb, click in the enter search text box and start typing the name of the suburb you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.

Editing Suburb/Post Code List

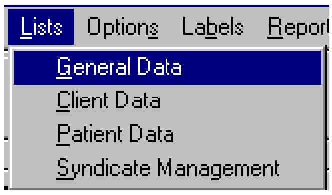
1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Suburbs/Post Codes heading

Click in the Enter Search Text box. Start typing the name of the suburb you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the suburb you wish to edit*). Once you can see the suburb in the suburb box, click in the boxes you wish to change one at a time and make your alterations, once you are happy with the changes, click on the Save button.

If you wish to edit another suburb, click in the enter search text box and start typing the name of the suburb you wish to edit and repeat the above steps.

If you are finished, click on File and then click on Exit.

Adding to Supplier List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Suppliers heading

Click on the New button.

Now click in the Supplier box and type in the name of your new supplier.

Now click in the Contact box and type in the name of the contact person.

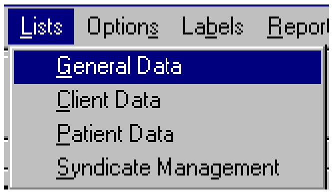
Continue on until you have filled in all the necessary details.

Now click on the Save button.

If you wish to make another new supplier, click on the New button and repeat the above steps.

If you are finished click on File and then click on Exit.

Deleting from Supplier List



1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Suppliers heading

Click in the enter search text box, start typing the name of the supplier you wish to delete until it appears in the supplier box. (*you can also use the left and right arrows on either side of the enter search text box to find the supplier you wish to delete*)

Now click on the Delete button.

A WARNING will appear

Are You Sure You Want To Delete This Supplier?

Y/N

You have to type in the box below Y and click on the OK button.

If you wish to delete a further supplier, click in the enter search text box and start typing the name of the supplier you wish to delete and repeat the above steps.

If you are finished, click on File and then click on Exit.

Editing Supplier List

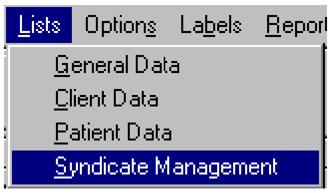
1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Suppliers heading

Click in the Enter Search Text box. Start typing the name of the supplier you wish to edit (*you can also use the left and right arrows on either side of the enter search text box to find the supplier you wish to edit*). Once you can see the supplier in the supplier box, click in the boxes you wish to change one at a time and make your alterations, once you are happy with the changes, click on the Save button.

If you wish to edit another supplier, click in the enter search text box and start typing the name of the supplier you wish to edit and repeat the above steps.

If you are finished, click on File and then click on Exit.

Adding a Patient to a Syndicate



From the Main Menu

Click on lists, syndicate management

To add a patient to a syndicate, click on the syndicate name in the syndicates list, now click on patient from the top menu bar, then click on add patient, then click on add existing patient.

A search for patient box will now be showing

Start typing the name of the patient until the black arrow is pointing to the correct patient.

Press enter on your keyboard - A message will appear

This patient is not fully syndicated, click on the OK button

Another message will appear

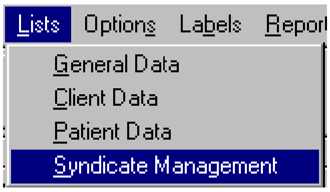
This patient is not fully syndicated, click on the OK button

The messages appear to remind you to set the syndication, as it is important.

Your patient will now be showing in the patient list.

You now need to add stakeholders, look in the help file under the Subject Syndication Topic: Adding a Stakeholder

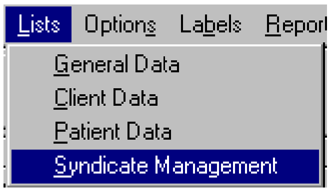
Adding a Stakeholder



From the Main Menu
Click on lists, syndicate management
To add a stakeholder, click on the syndicate name in the syndicates list. Now the patients belonging to this syndication will be showing in the patients list. Click on the patient this new stakeholder belongs to, now click on stakeholder on the top menu bar, then click on add stakeholder, then click on add existing client.
A search for client box will now be showing
Start typing the name of the client until the black arrow is pointing to the correct client.
Press enter on your keyboard.
A message will appear
Enter the percentage for this stakeholder, maximum stake available e.g.: 50%
Type in the stakeholder's percentage and click on the OK button.
Once you have finished adding stakeholders, click on File then click on Exit.

Deleting a Syndicate
From the Main Menu
Click on lists, syndicate management
(*Before you delete the syndicate, remove the patients from the syndicate, look in help under the Subject: Syndication Topic: Removing a Patient*)
To delete a syndicate, click on the syndicate name in the syndicates list you wish to delete, now click on syndicates from the top menu bar, then click on delete syndicate.
A message will appear
Are you sure you want to delete the syndicate Yes/No
Type in Yes and click on the OK button.
The syndicate has now been removed.
Click on File then click on Exit.

Editing Stakeholder Percentages
From the Main Menu
Click on lists, syndicate management
(*If you wish to decrease one stakeholders percentage and increase another stakeholder percentage, you need to decrease first so that the higher percentage will be available when you go to increase the other stakeholders percentage*)
To edit a stakeholder percentage, click on the syndicate name in the syndicates list. Now the patients belonging to this syndication will be showing in the patients list. Click on the patient the stakeholder belongs to, now the stakeholders for this patient will be listed in the stakeholders list below. Click on the stakeholder you wish to alter the percentage for, now click on stakeholders from the top menu bar, then click on edit stakeholder percentage.
A message will appear
Enter the new percentage for this stakeholder, maximum stake available is e.g.: 50%
Type in the new percentage and click on the OK button.
When you have finished editing stakeholder percentages click on File, then click on Exit.



Removing a Patient
From the Main Menu
Click on lists, syndicate management
To remove a patient, click on the syndicate name in the syndicates list that the patient belongs to, now the patients belonging to this syndication will be showing in the patients list. Click on the patient you wish to remove from this syndicate, now click on patients from the top menu bar, then click on remove a patient.
A Warning will appear
Are you sure you want to remove the patient from the syndicate?Yes/No
Type in Yes and click on the OK button
(*When you remove a patient from a syndicate the stakeholders are automatically removed as well*)
Once you have finished click on File, then click on Exit

Removing a Stakeholder
From the Main Menu
Click on lists, syndicate management
To remove a stakeholder, click on the syndicate name in the syndicates list, now the patients belonging to this syndication will be showing in the patients list. Click on the patient the stakeholder belongs to, now the stakeholders for this patient will be listed in the stakeholders list below. Click on the stakeholder you wish to remove from this syndicate, now click on stakeholder on the top menu bar, then click on remove stakeholder.
A Warning will appear
Are you sure you want to remove the stakeholder from the syndicate?Yes/No
Type in Yes and click on the OK button
(*If you remove a stakeholder from a syndication you will need to go in and edit the remaining stakeholders percentages or add another stakeholder*)
You will find further help on editing stakeholder percentages and adding stakeholders in the help file under the Subject Syndication

Setting up a Syndication
From the Main Menu
Click on lists, syndicate management
Click on syndicates from the top menu bar, now click on new syndicate
A message will appear
Enter a name for the new syndicate, type in the syndicate name and click on the OK button.
Your new syndicate name will now be showing in the syndicates list and has been allocated a syndicate number.
The next step will be to add a patient to the syndicate. Click on the syndicate name in the syndicate list, then click on patients from the top menu bar, now click on add patient, now click on add existing patient.
A search for patient box will now be showing
Start typing the name of the patient until the black arrow is pointing to the correct patient.
Press enter on your keyboard.
A message will appear

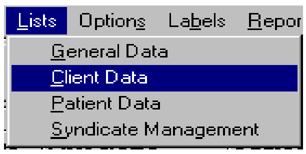
This patient is not fully syndicated, click on the OK button
Another message will appear
This patient is not fully syndicated, click on the OK button
The messages appear to remind you to set the syndication as it is important.
Your patient will now be showing in the patient list.
We now need to select the stakeholders, to do this, click on stakeholders from the top menu bar. Then click on add stakeholder, then click on add existing client.
A search by client box will now be showing
Start typing the name of the first client who is a stakeholder in this syndication until the black arrow is pointing to the correct client then press enter on your keyboard.
A message will appear
Enter the percentage for this stakeholder, maximum stake available - 100%
Type in the % for this stakeholder e.g.: 50 and click on the OK button.
Repeat the above steps until you have all the stakeholders listed.
(*You can have several patients in a syndication if you wish, set them up one at a time*)
Once you have finished click on File, then click on Exit.

Adding to Title List

1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Titles heading

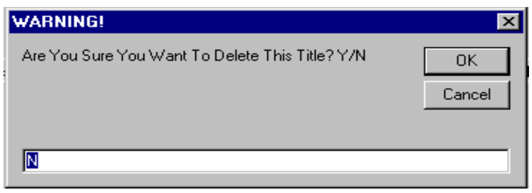
Click on the New button.
Now click in the Title box and type in the new title.
Now click on the Save button.
If you wish to make another new title, click on the new button and repeat the above steps.
If you are finished click on File and then click on Exit.

Deleting from Title List



1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Titles heading

Click in the enter search text box, start typing the name of the Title you wish to delete until it appears in the title box. (*you can also use the left and right arrows on either side of the enter search text box to find the title you wish to delete*)
Now click on the Delete button.



A WARNING will appear
Are You Sure You Want To Delete This Title? Y/N
You have to type in the box below Y and click on the OK button.
If you wish to delete a further title, click in the enter search text box and start typing the name of the title you wish to delete and repeat the above steps.
If you are finished, click on File and then click on Exit.

Editing Title List

1. From the MAIN MENU click on Lists
2. Click on CLIENT DATA
3. Click on the Titles heading

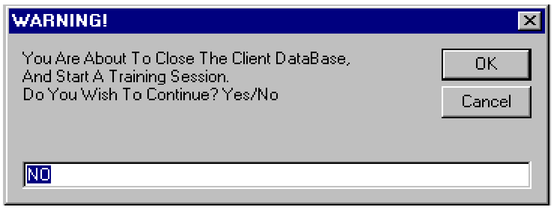
Click in the Enter SearchText box, start typing the name of the Title you wish to Edit

(you can also use the left and right arrows on either side of the enter search text box to find the title you wish to edit). Once you see this title appear in the title box, click in the title box and alter the name, then click on the Save button.
If you wish to edit another title, click in the enter search text box and start typing the name of the title you wish to edit and repeat the above steps.
If you are finished, click on File and then click on Exit.

Training Mode

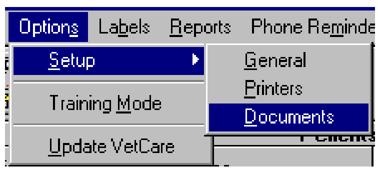
VetCare has a separate database for training to your live database, you can go into training mode and practice without it affecting your live database, it is advisable that all staff spend some time in training mode practising before going live so they have a good understanding of VetCare.

From the Main Menu
Click on Options
Click on Training Mode
A WARNING will appear saying
You are about to close the client database, and start a training session.
Do you wish to continue? Yes/No
You need to type in YES and then click on the OK button.



You will now be in the training mode, you will see at the top of the screen TRAINING SESSION flashing, this is to let you know you are no longer in the live database, so go crazy you can not do any harm practice as much as you want.
When you are ready to return to the live database do the following
Click on Options
Click on Training Mode
A WARNING will appear saying
You are about to end a training session and return to the client database.
Do you wish to continue? Yes/No
You need to type in YES and then click on the OK button.
You will now be back at the live database, up the top of the screen you should see VetCare - Main Menu showing

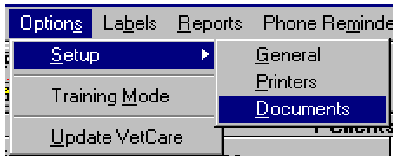
Creating Vaccination Reminder Letters



1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on Documents

This will bring you to the VetCare Document Editor Screen.
You will now be looking at a blank page on the left, click on the page so your cursor is flashing on the page and you can now start typing your vaccination reminder letter details.
To add fields, click on the page where you wish to place a field so the cursor is flashing, then click your right mouse button. Now click on insert field, then click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on OK.

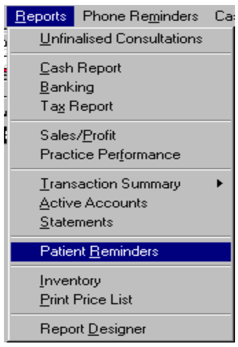
Once you have finished your alterations, click on the save as button. The save home care note as box will say notes. Just to the right of this you will see a folder with a bent up arrow on it. Click on this once, now the look in box will say VetCare. Listed below you will see a folder called letters, double click on this folder, the look in box will now say Letters, now click in the file name box and type in the name you wish to give this reminder letter e.g.: vaccrem and then click on save.
You can print a test page if you wish, when you have finished click on file, then click on exit.



Editing a Vaccination Reminder Letter

1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on the Documents

This will bring you to the VetCare Document Editor Screen.
Click on the Open button, the select a document box will now appear, 'look in' will say VetCare. Listed below you will see a folder called Letters, double click on this folder the 'look in' box will now say Letters. Listed below you will see any reminder letters you have created, double click on reminder letter you wish to edit, this will show you the reminder letter on the left. From here you can make any necessary alterations to the letter.
To add fields, click on the note where you wish to place a field so the cursor is flashing on the page. Then click your right mouse button, now click on insert field, then click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on OK.
Once you have finished your alterations, click on the save button.
You can print a test page if you wish, when you have finished click on file, then click on exit.
When you print a test page VetCare puts details in the fields as an example, if you need to make further changes after you print a test page, you need to click on the Open button and select the reminder letter again as we did above before making further changes.

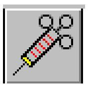


Printing Vaccination Reminder List

From the MAIN MENU in VetCare, click on Reports, Patient Reminders.
Click on any Vaccines you don't want and they will appear in the Exclude These box, now you need to put in Booster Due the date range you want e.g.: From: 1/10/98 To: 31/10/98, then click on Search. This will produce a search result that is the list of people due for a reminder, you then click on Select All, you will see the list is now highlighted.
Click on File, then click on print list. A message will appear
Do you want to print using your Word Processor?
Yes No
Click on the Yes button - The print a list box will now appear
You need to type in a name for your list, e.g.: vacclist and click on save. (*make the name of your list 8 characters or less with no spaces*)
Your word processing program will now be open and your list will be showing, you can now make any layout alterations if necessary and then click on File, Print and print your list.

Selecting Vaccines within a Consultation

Once you have opened a client and patient file and started a new consultation you can select vaccines.

Click on the vaccinations but-  ton on the bottom of the screen, (*or press F5 on your keyboard*).

From the vaccine list on the left click on the vaccine you want so it is highlighted.

The next section is Next Vaccination Due, the preset time period will be showing, if you need to alter the vaccination due period, click in the appropriate box and make your changes.

The next section is the Type of vaccination they will be due for next time, if you need to change this, click on the down arrow and select what their next vaccination should be.

If you wish to change the price click in the temporary price box and type in the amount you wish to charge.

If you need to change the quantity, click in the quantity box and change the quantity.

Once you are finished, click on select.

A window will appear asking

Print A Certificate? Y/N

Yes or No

If you wish to give your client a vaccination certificate click on yes otherwise click on no.

Sending Vaccination Reminders

If you have already created a Vaccination Reminder Letter continue as follows, if not you will need to create your reminder letter first, look in the help file under the Subject (Vaccination) and the Topic (Creating A Vaccination Reminder Letter).

From the MAIN MENU in VetCare, click on Reports, Patient Reminders.

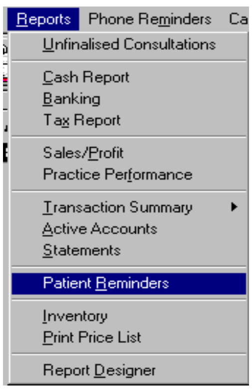
Click on any Vaccines you don't want and they will appear in the Exclude These box.

Now you need to put in Booster Due the date range you want e.g.: From: 1/10/98 To: 31/10/98, then click on Search. This will produce a search result which is the list of people you are going to be sending your vaccination reminders to, you then click on Select All, you will see the list is now highlighted. Click on File, then click on Print Reminders.

The Select A Reminder Letter box will now appear

'Look in' will say letters and listed below will be all the letters you have created, double click on the vaccination reminder letter you wish to use. VetCare will now start printing your vaccination reminder letters.

Sending Vaccination Reminders Using MSWord



You do not need to use a word processing program to do your vaccination reminders VetCare will do them automatically for you, making it much quicker and easier.

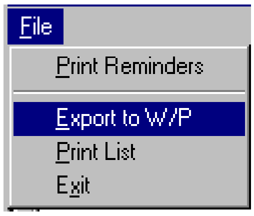
To do your vaccination reminders using VetCare look in the help file under the Subject (Vaccination) and the Topic (Printing Vaccination Reminders)

If you wish to use a word processing package like MSWord continue as follows:

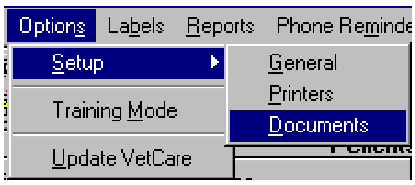
Make sure your word processing program is not open as VetCare will open it automatically when it is ready.

From the MAIN MENU in VetCare, click on Reports, Patient Reminders.

Click on any Vaccines you don't want and they will appear in the Exclude These box. You can leave Fields as there is no need to exclude any of the fields, now you need to put in Booster Due the date range you want From: To:, then click on Search. This will produce a search result which is the list of people you are going to be sending your vaccination reminders to. Next click on Select All, you will see the list is now highlighted.



Click on File, then click on Export to W/P.
A Message will appear
Start Word Processor Now Y/N?
Click on the yes button.
Use exiting form letter Y/N?
If this is the first time you are doing vaccination reminders you would click on the no button, as you need to create the vaccination letter.
(*If you have done vaccination reminders before you would click on the yes button, you would then click on the file name you wish to use and click on OK. Your word processor and letter will be loaded and all you have to do is click on tools, then click on mail merge. This will bring up the three step process and all you have to do is step 3 - click on merge, a merge window will appear, click on merge again and you have completed your mail merge ready for printing*)
If you clicked on no VetCare will automatically open up your word processing package with a sample document showing.
Click on Save As, and type in the name you wish to use for your new vaccination letter, now click on Save.
You can now delete the information on the screen and start typing and create your new letter. To add fields to your document, click on the Insert Merge Field button and click on the field you wish to insert. Once you have finished creating your document, click on File, then click on Save.
Click on Tools, then click on Mail Merge
.Step 1 is now complete
Step 2 is complete, VetCare has completed step 2 automatically.
Step 3 - Click on the merge button, a merge window will no appear, click on the merge button.
Now you will see a separate letter for each client, just click on Pg Up and Pg Dn to see them all, now you print your letters by clicking on File, Print, Ok. You can also save this document if you wish, if you were printing it straight away you would most likely not need to

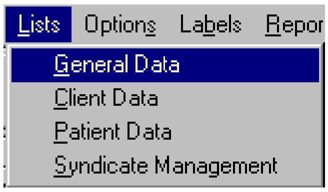


Vaccination Certificate Layout

1. From the MAIN MENU click on Options
2. Click on Setup
3. Click on the Documents

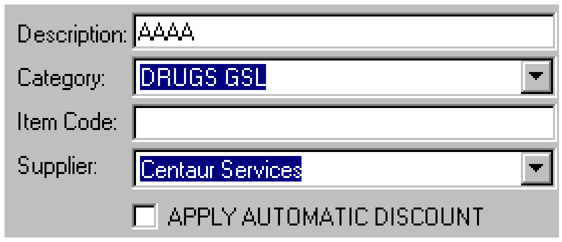
This will bring you to the VetCare Document Editor Screen.
Click on the Open button, the select a document box will now appear, ‘look in’ will say VetCare. Listed below you will see a folder called Certificates, double click on this folder, the ‘look in’ box will now say Certificates, listed below you will see VaccCert.rtf, double click on VaccCert.rtf, this will show you the vaccination certificate on the left. From here you can make any necessary alterations to the certificate.
The first time you change your vaccination certificate layout you will need to highlight the wording YOUR PRACTICE DETAILS AND/OR LOGO HERE, and type in your practice details etc. If you print your certificates on letterheads, just delete the wording and press en-

ter on your keyboard a few time to move the information down so it won't print over your letterhead.
To add fields, click on the certificate where you wish to place a field so the cursor is flashing on the page, then click your right mouse button. Now click on insert field, then click on either client field or patient field etc and a list of fields will drop down, click on the one you want and it will be placed in the document.
To change font, font sizes, colour etc, highlight the text you wish to alter and click the right mouse button and click on font, make your changes then click on OK.
Once you have finished your alterations, click on the save button.
You can print a test page if you wish, when you have finished click on File, then click on



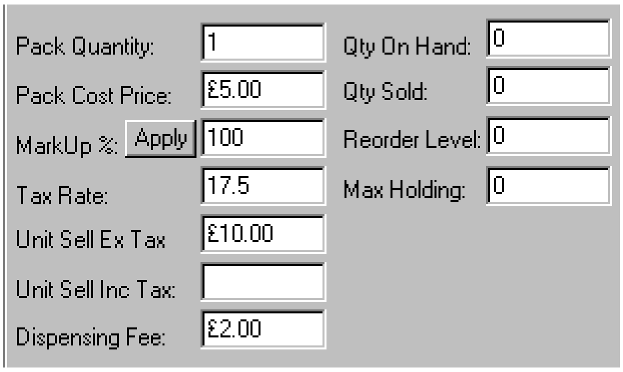
Adding to Vaccine List
Vaccines are created in the Product List
1. From the MAIN MENU click on Lists
2. Click on GENERAL DATA
3. Click on the Products heading

(*Before creating any products under the Products heading - make sure you have been in and created all your categories under the Fee/Product Categories heading and added your suppliers and their details under the Suppliers heading and created any reminders under the Patient Reminders heading, as you may need to select them as we proceed*).
Click on the New button.



Click in the Description box, type in the name of your new vaccine.
Now click on the down arrow in the far right hand side of the Category box, this will drop down a list of all the categories you have created.
Click on the category you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*).
If you wish to put in an Item Code, click in the item code box and type in your number (*this could be a bar code or your own product number, you can leave this field blank if you do not wish to use item codes*).
Now click on the down arrow in the far right hand side of the Supplier box, this will drop down a list of all the suppliers you have created. Click on the supplier you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*).
APPLY AUTOMATIC DISCOUNT - If you wish this product to be discount sensitive click in the box so a tick appears. (Discount sensitive means that if the client has a discount % set, when selecting this product from within a consultation, the price will show in red in the discounted price box, you can over ride this price within a consultation if you want by typing in a temporary price). Discounted prices will only show if the client has been given a discount % otherwise the standard list prices will be showing. (*To find out how to set discount % for clients look in the help file under Subject: Accounts Topic: Discount % Percentage*)
Now click in the Pack Quantity box and type in the pack quantity.
Now click in the Pack Cost Price and type in the pack cost price.
Now click in the Mark Up % box and type in the % you wish to mark up this product eg: for 50 % you would just type in 50 and then click on the Apply button. You must have a pack cost price for the mark up % to work.

If you have typed in a pack cost price and a mark up %, the unit sell price will automatically be worked out and appear in the unit sell price box.
If you do not wish to put in a mark up % you can just type in a unit sell price.
Now click in the Dispensing Fee box and type in an injection fee if applicable.
Now click in the Qty On Hand box and type in the quantity on hand.



Now click in the Reorder Level box and type in the minimum quantity you want in stock before reordering.
Now click in the Maximum Holding box and type in the maximum quantity you want to hold in stock.
The next section is Show Product:
The first box is - In Consult
You want this product to appear in the consult list, click in the box so a tick appears.
The next section is This Product Is A:
Make sure you have a tick in the vaccine box.

The next section is Reminder.
If you wish to have a reminder attached to this product click on the down arrow in the far right hand side of the reminder box, this will drop down a list of all the reminders you have created. Click on the reminder you want (*if you can not see the one you want click on the up and down scroll bar to see more, once you can see the one you want click on it*). If you do not require a reminder to be attached to this product just go on to the next section.
The next box is the Home Care Notes box (*only complete this section if you wish to have a Home Care Note automatically print when you select this product within a consultation*). If you wish to select a Home Care Note for this product click on the down arrow in the far right hand side of the Home Care Note box, this will drop down a list of all the Home Care Notes you have created. Click on the one you want.
The next section is Booster Due After - this is were you set the standard booster period for this vaccination by typing in one of the boxes next to either years, months or weeks.
If you never want a booster due set click in the circle next to Never so a black dot appears.
Now click in the Protection box and type in the protection this vaccine gives e.g.: PARVO-DISTEMPER-HEPATITAS, you can type up to 40 characters in this box.
The above instructions are for any vaccine you purchase and sell as an individual item e.g.: DHPPi, you will not need to fill in the Inventory Adjustments section for this vaccine
Click on the Save button
If you have finished click on File and then click on Exit.

COMBINED VACCINES - EG: Booster = DHPPi + L
This is an example only:
If you wish to set up a vaccine e.g.: Booster that may be a combination of DHPPi & L and you do not sell DHPPi or L just Booster within a consultation you would do the following:
Set up Booster as a product as above except you will need to complete the Inventory Ad-

justments section, before you do this set up DHPPi and L as products first so they are available in the inventory adjustment section.
When setting up DHPPi and L follow the instruction as above except for a few changes as listed below:
Show Product - you would not want a tick in either box as this item is not sold directly as DHPPi.
This Product is a - you would not have a tick in any of these boxes either as DHPPi is only a part of the vaccine Booster.
Print a Label you would have NEVER selected.
Quantity and Regime Boxes - you would not need to fill in this section as DHPPi and L are not going to be sold individually.
You can now set up your Booster product as above except for the following changes:
As Booster is not the item you purchase from your supplier it is DHPPi and L you do not need to fill in the Quantity On Hand, Re Order Level or Maximum Holding
Show Product - you would have a tick in the box next to in consult as this is the item you will be selecting from within the consultation.
This Product is a - you would have a tick in the vaccine box, fill in the booster due section as instructed above and then you will complete the Inventory Adjustments section.
Inventory Adjustments. As the Booster is a combination of DHPPi & L, in the first quantity box you would type in the quantity used of DHPPi e.g.: 1. Then in the product box click on the down arrow and select DHPPi, then click on the second quantity box and type in the quantity used of L e.g.: 1 and then in the product box click on the down arrow and select L. You can use fractions in the quantity box e.g.: if you only use one tenth of an L you would put .1 in the quantity box if you use half you would put .5 etc.
Click on the Save Button.

Deleting a Vaccine
Deleting a Vaccine is done from the Product List
Look in the help file under: Subject: Products Topic: Deleting from Product List

Editing a Vaccine
Editing a Vaccine is done from the Product List
Look in the help file under: Subject: Products Topic: Editing Product List

VetCare Report Designer for items sold during a specific period

This how-to will step you through using the report designer in Vetcare to search for specific items sold between two dates. In this example we are searching for all Advantage products sold between the 1st of January 2003 and the 20th of March 2003. You can modify the dates and the product to your suit your own search.

From the Vetcare main screen, select **REPORTS – REPORT DESIGNER**. This will open the report designer window. Since we are searching for all items sold with a certain description, select, - **ItemsSold[Description]** from the Items Sold drop down menu. (Fig 1.1)

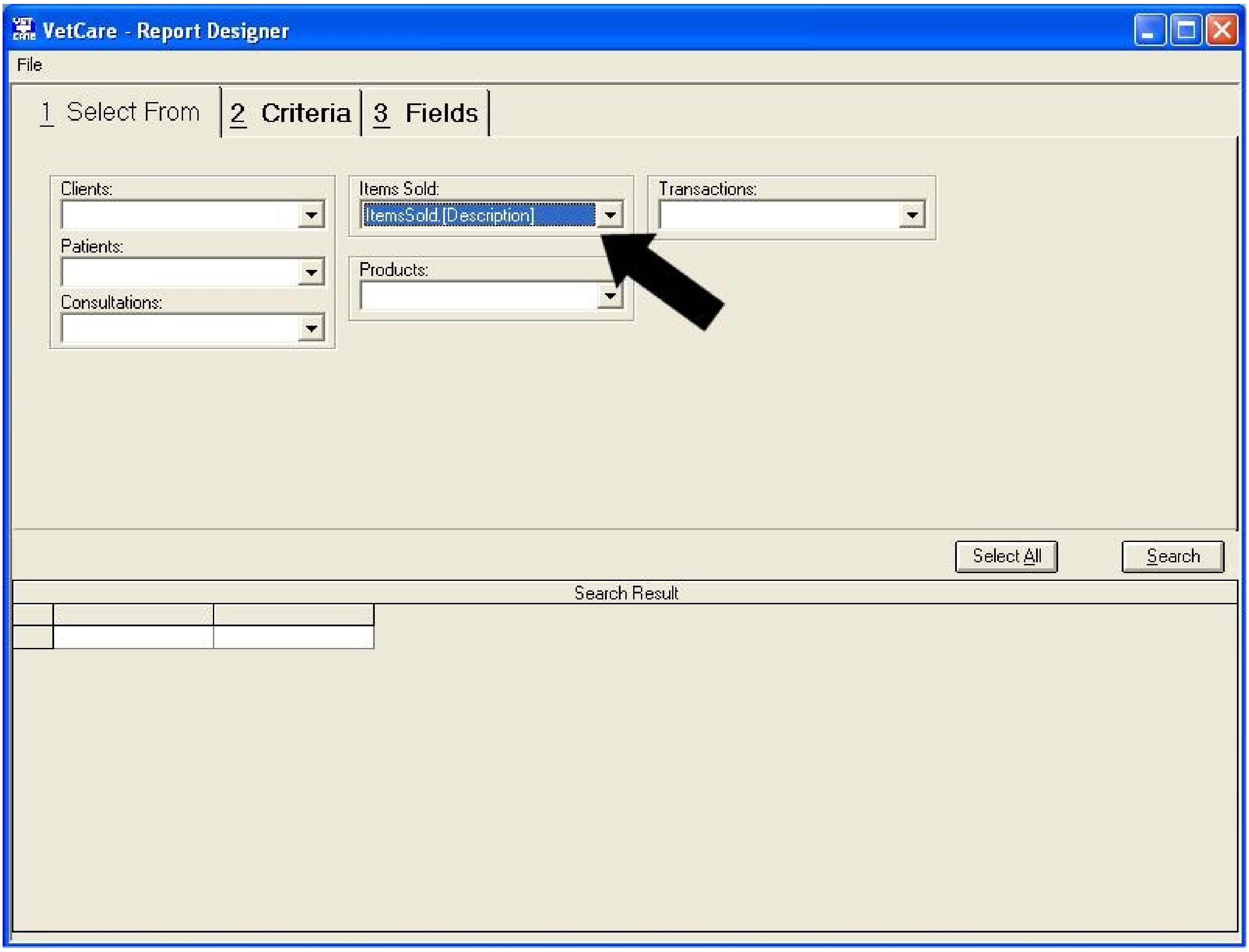


Fig 1.1

Once you have selected **ItemsSold[Description]** from the list, click on the tab at the top of the window labelled – **2 Criteria.** (Fig 1.2)

This will switch you to the criteria screen. This is where you specify the specific product you wish to search for. From the centre pull down menu, select **LIKE**. This will allow you to search for a specific word in the **ItemsSold[Description]** field of the database. In the last empty box type the name of the product you wish to search for, as it appears in you product or professional fees listings. Placing an asterisk ' * ' on each end of the word forces the program to use the product name as a 'wildcard'. This will allow the search to find the word in any sentence, upper or lower case. If you do not include the asterisk, the search may not include all advantage products.

Once you have your product description entered, click the **AND** button to add the search criteria to the list of the right side of the window.

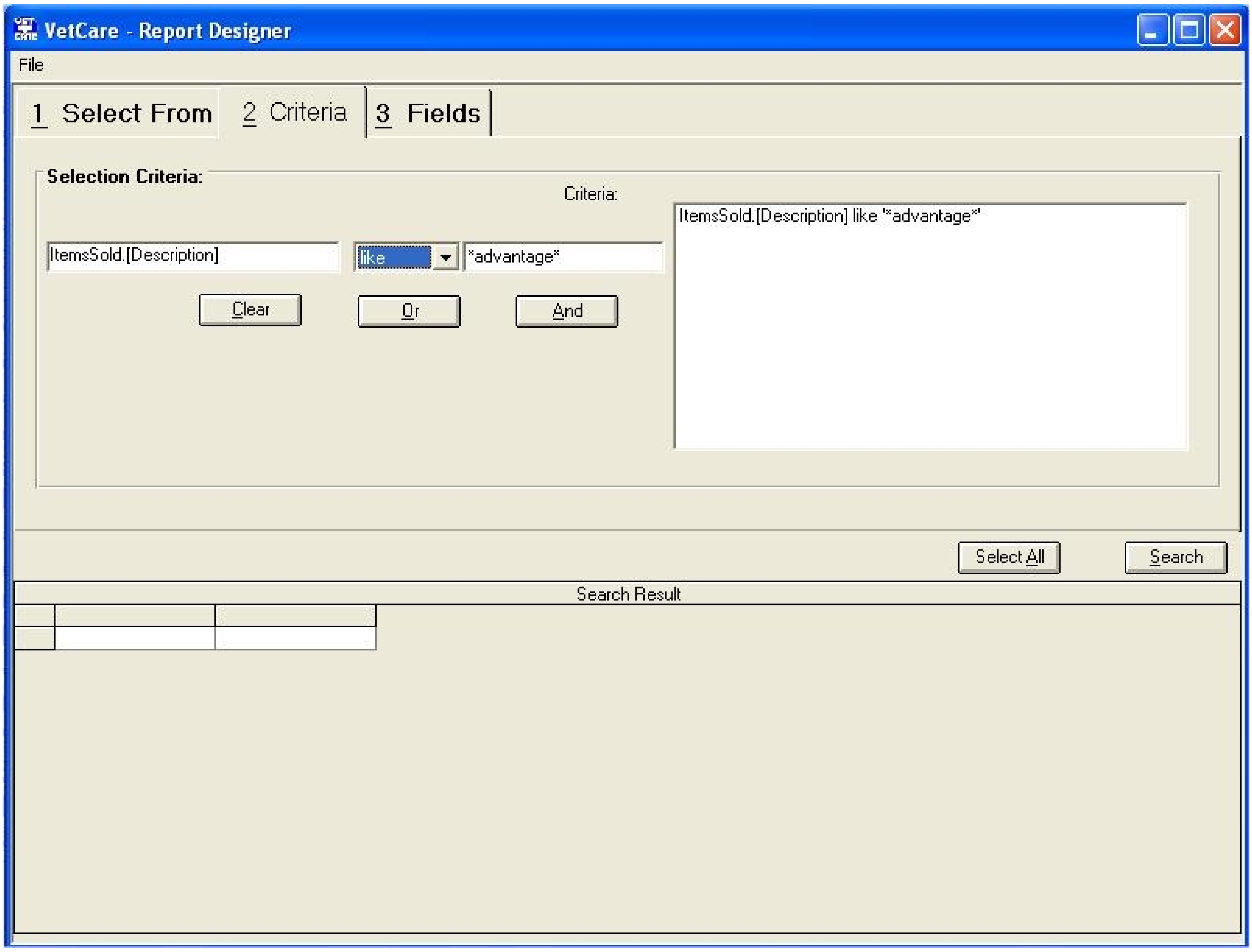


Fig 1.2

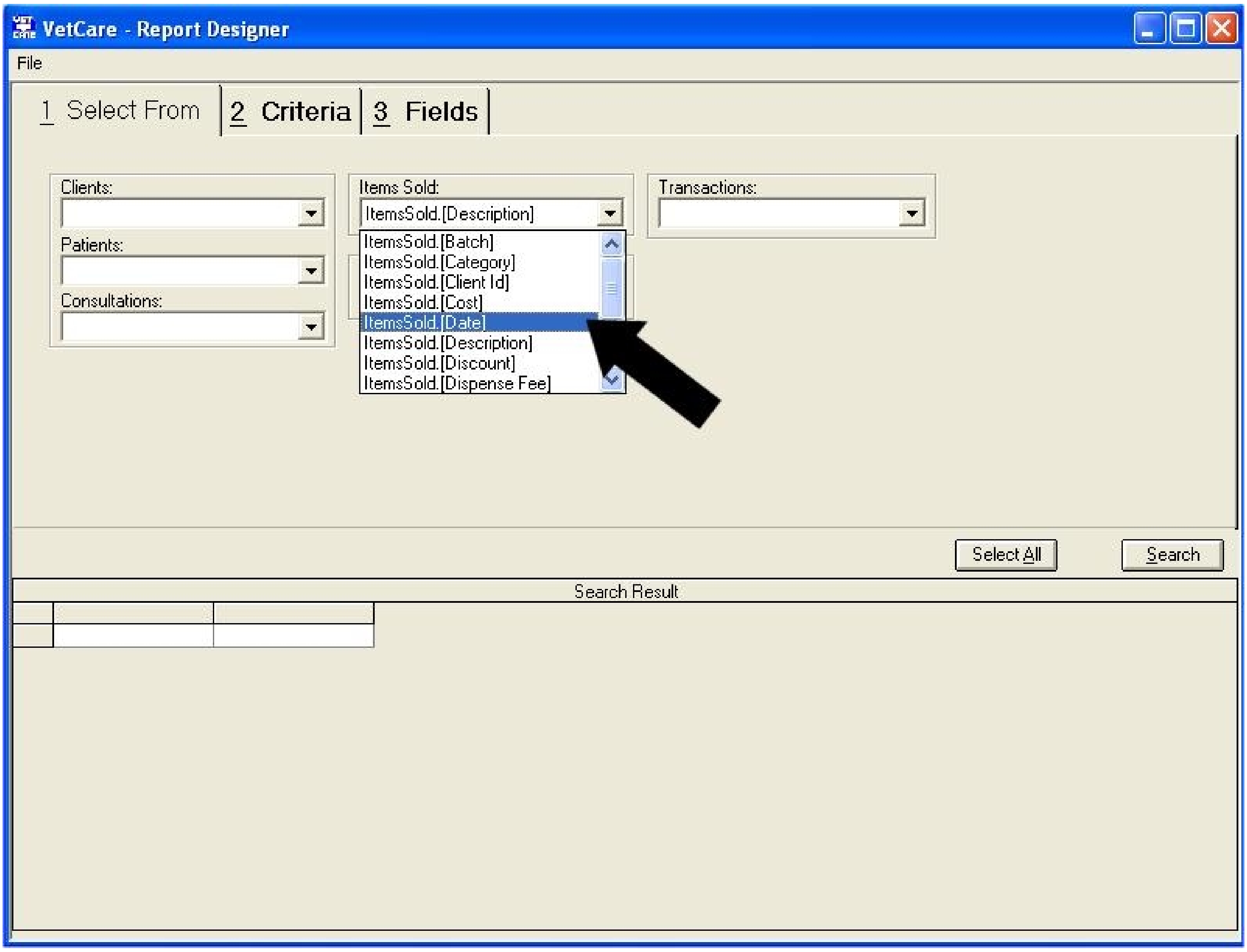


Fig 1.3

Now that you have selected the product you wish to search for, you can go onto selecting the date ranges you want to see all sales for.

At the top of the window, click on the tab labelled – **1 Select From**. This is where we started. From the Items Sold pull down menu, choose **ItemsSold[Date]**. This will allow us to search for all items sold and their specific sale dates. (fig 1.3)

When you have selected **ItemsSold[Date]** from the drop down menu, click on - **2 Criteria**, tab at the top of the page.

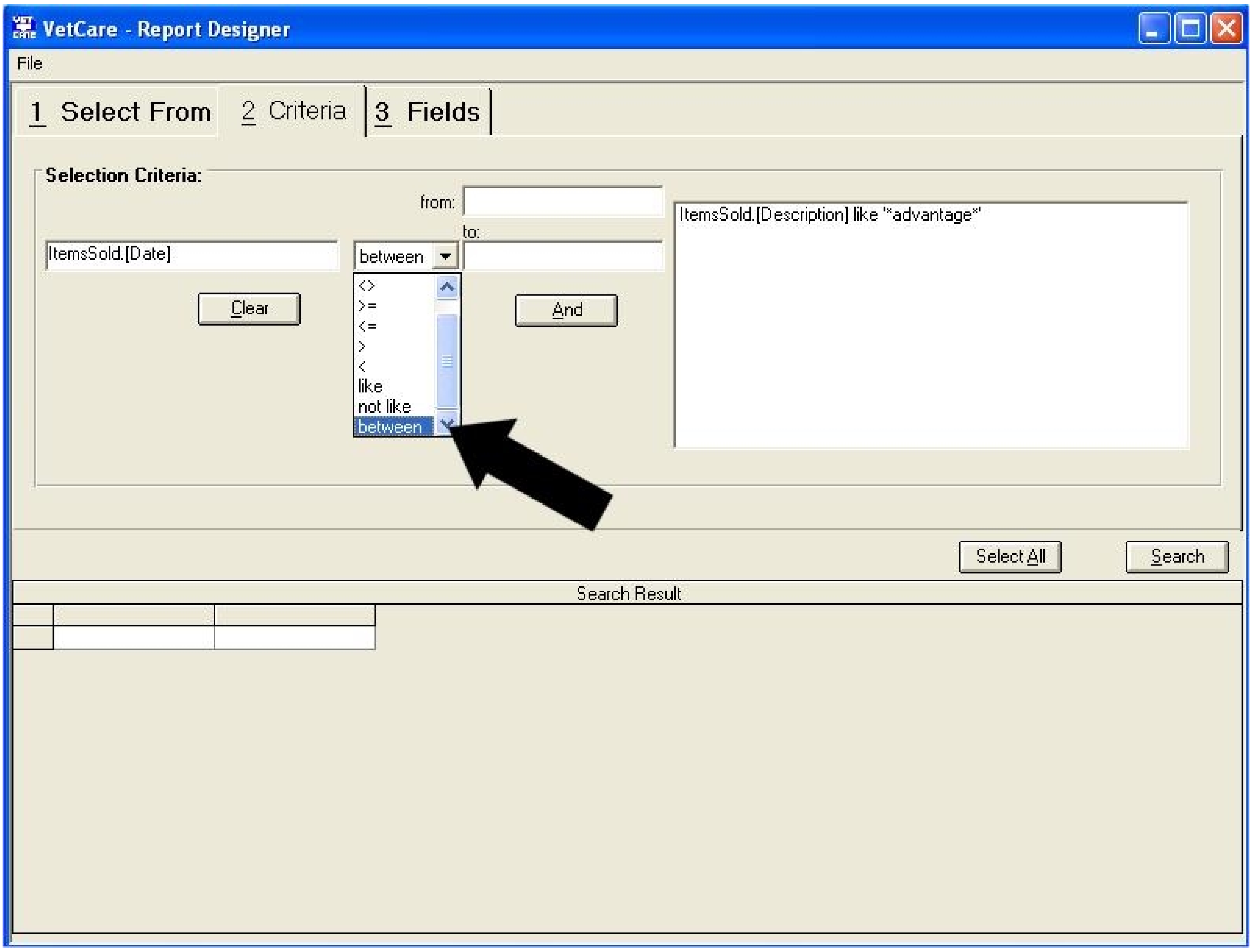
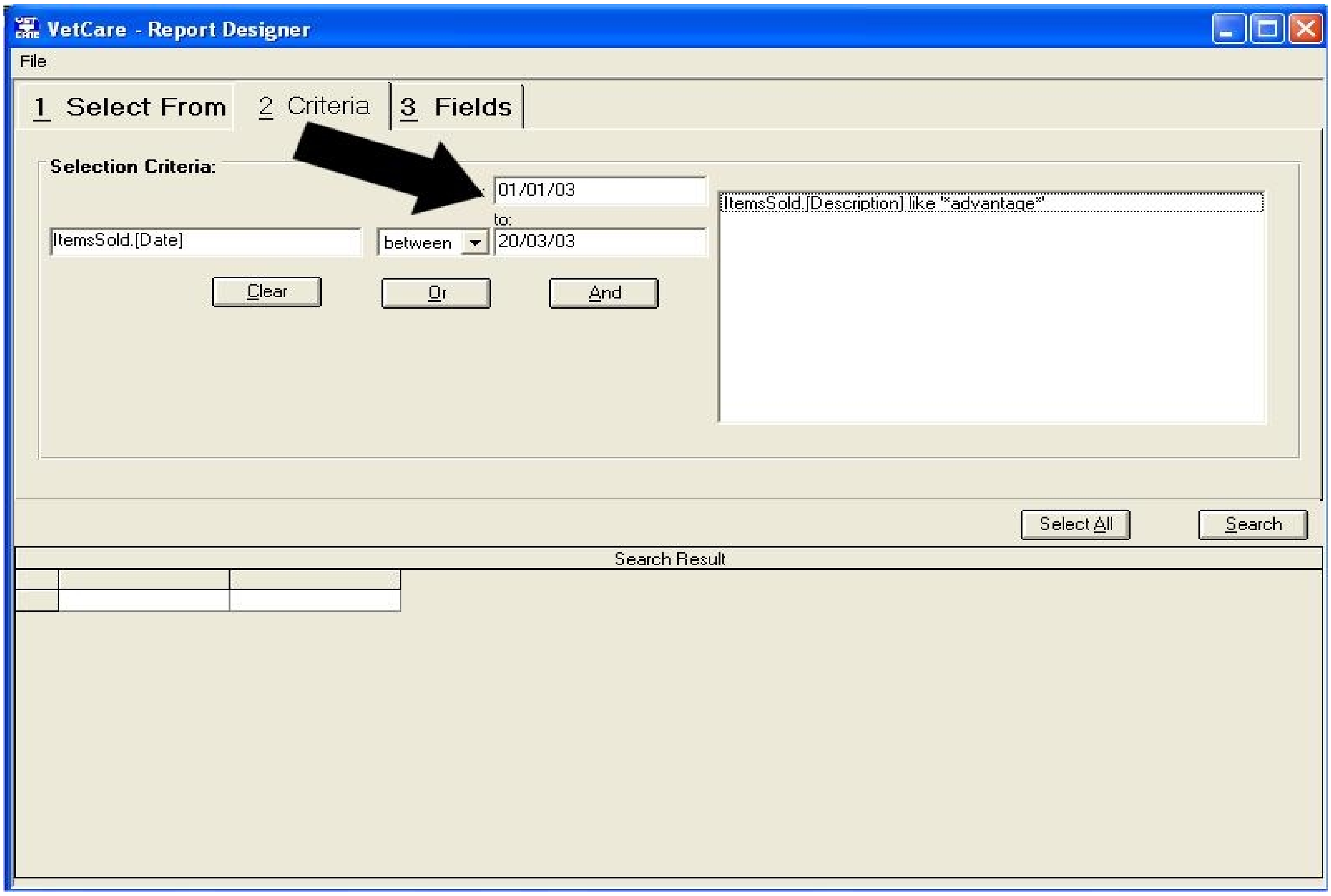


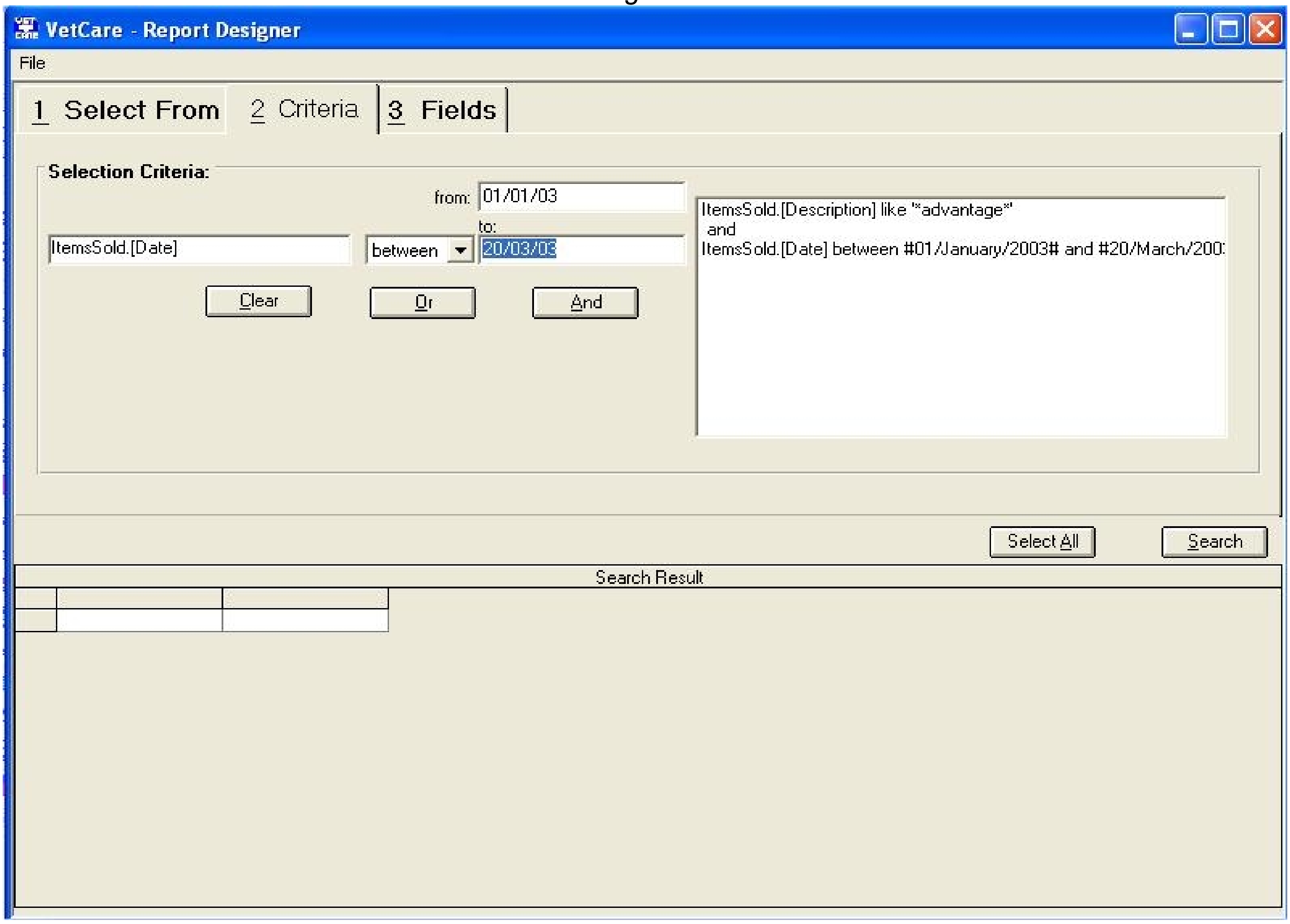
Fig 1.4

From the centre drop down menu, select 'between' from the list. (Fig 1.4). This will allow us to select two dates to search between. Two boxes will appear, **From and To**. In these, type the dates you wish to search between in a **DD/MM/YY** format. (Eg, 01/01/02) (Fig 1.5). When you have entered your dates, click the **AND** button again to add this search to the list. (Fig 1.6 & 1.7)



VetCare - Report Designer
File
1 Select From
2 Criteria
3 Fields
Selection Criteria:
01/01/03
to:
ItemsSold.[Date]
between
20/03/03
ItemsSold.[Description] like "*advantage*"
Clear
Or
And
Select All
Search
Search Result

Fig 1.5



VetCare - Report Designer
File
1 Select From
2 Criteria
3 Fields
Selection Criteria:
from:
01/01/03
to:
ItemsSold.[Date]
between
20/03/03
ItemsSold.[Description] like "*advantage*"
and
ItemsSold.[Date] between #01/January/2003# and #20/March/200:
Clear
Or
And
Select All
Search
Search Result

Fig 1.6

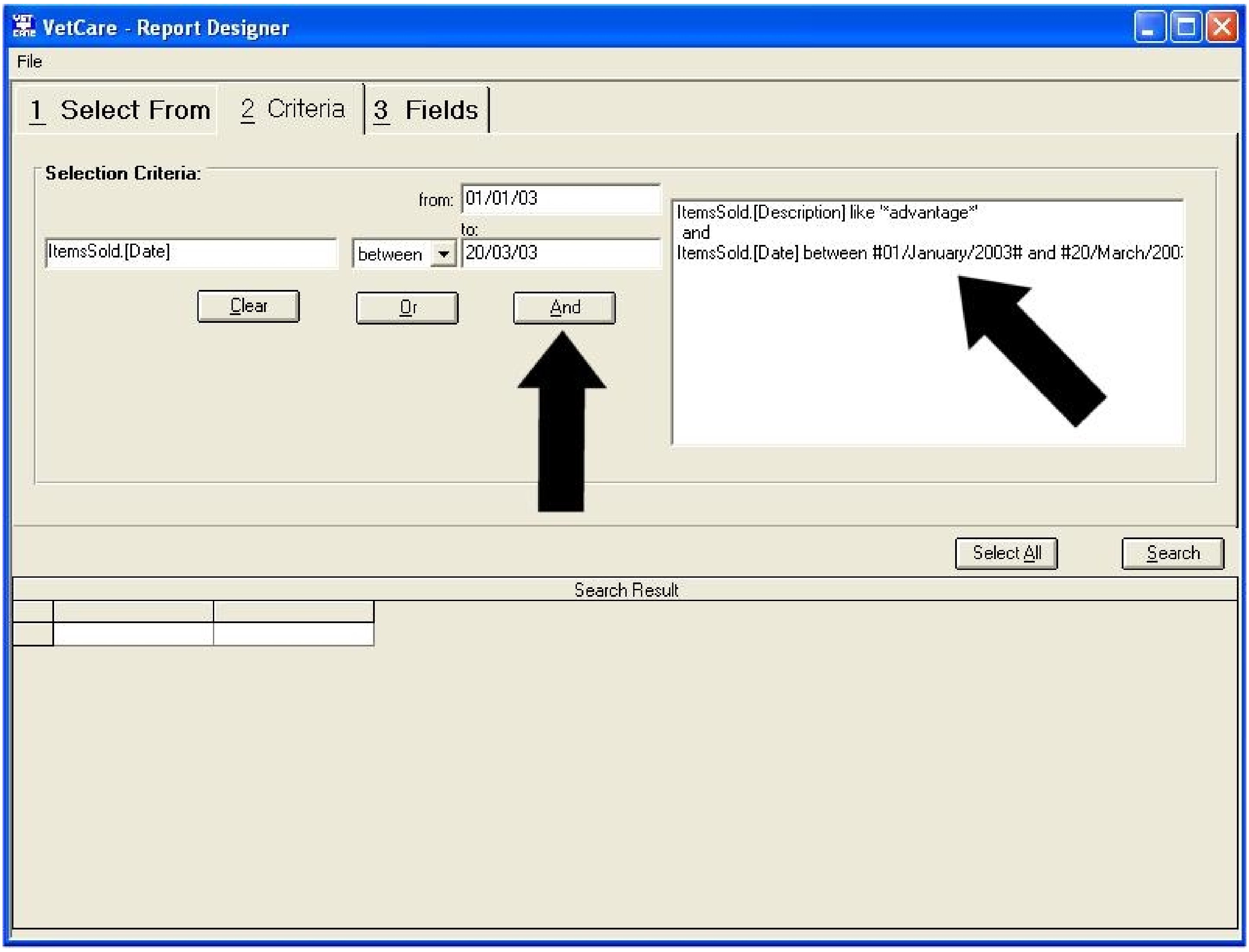


Fig 1.7

Once both search criteria have been added to the list, its time to list the information you'd like to see for each result.

Click on the tab – 3 Fields. This will open the fields section. From the list of fields to include on the left side of the window, select **ItemsSold[Description]**. This will allow us to see the description for each item sold that matches the search criteria. (fig 1.8). Since we don't want to see every item sold individually, we need to group each description together and count the number of each product sold.

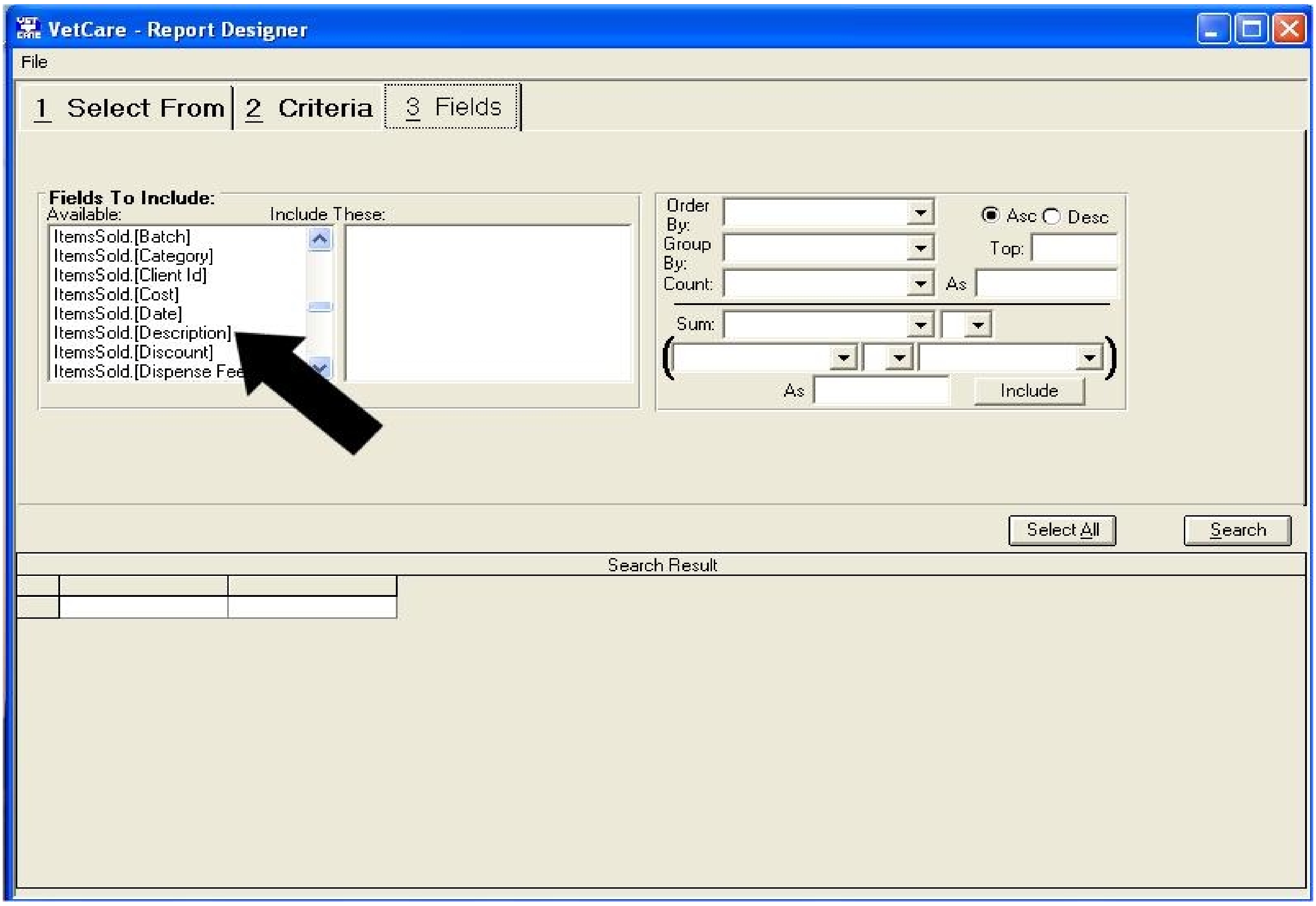

VetCare - Report Designer
File
1 Select From
2 Criteria
3 Fields
Fields To Include:
Available:
Include These:
ItemsSold.[Batch]
ItemsSold.[Category]
ItemsSold.[Client Id]
ItemsSold.[Cost]
ItemsSold.[Date]
ItemsSold.[Description]
ItemsSold.[Discount]
Order By:
Group By:
Count:
As
Asc
Desc
Top:
Sum:
As
Include
Select All
Search
Search Result

Fig 1.8

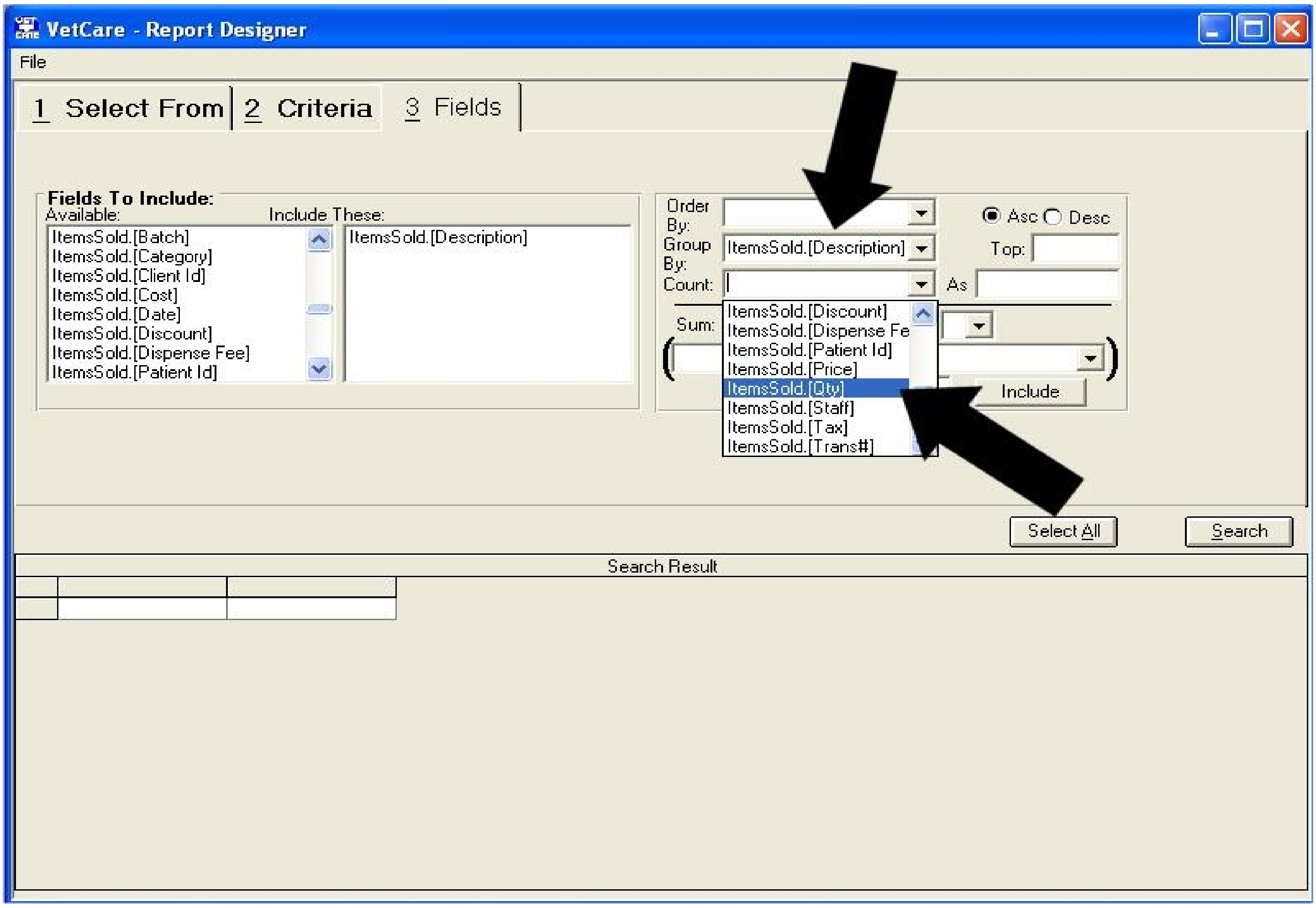

VetCare - Report Designer
File
1 Select From
2 Criteria
3 Fields
Fields To Include:
Available:
Include These:
ItemsSold.[Batch]
ItemsSold.[Category]
ItemsSold.[Client Id]
ItemsSold.[Cost]
ItemsSold.[Date]
ItemsSold.[Discount]
ItemsSold.[Dispense Fee]
ItemsSold.[Patient Id]
ItemsSold.[Description]
Order By:
Group By:
ItemsSold.[Description]
Count:
ItemsSold.[Discount]
ItemsSold.[Patient Id]
ItemsSold.[Price]
ItemsSold.[Qty]
ItemsSold.[Staff]
ItemsSold.[Tax]
ItemsSold.[Trans#]
Asc
Desc
Top:
As
Sum:
Include
Select All
Search
Search Result

Fig 1.9

To do this we use the options on the right side if the window. To group the products by their description, click the drop down menu next to **'Group By'** and select **ItemsSold[Description]**. Under this is the second option **'Count By'**. Drop down this menu and select **ItemsSold[Qty]**. This will tell the program to count each product sold. (Fig 1.9)

Next to this drop down menu is a **'As'** box, in here type the heading you like for the column. Eg Total sold or number sold. (Fig 2.0)

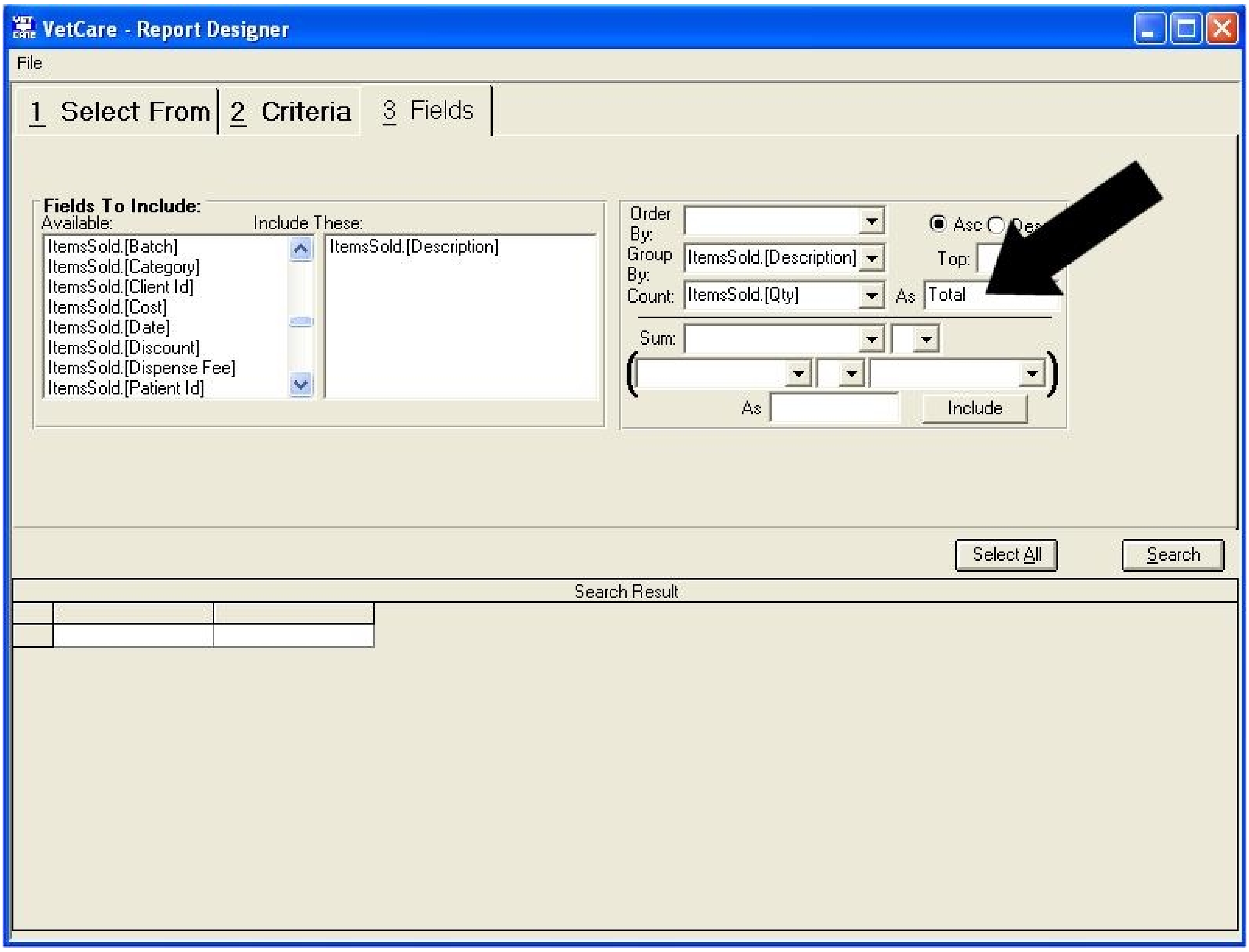
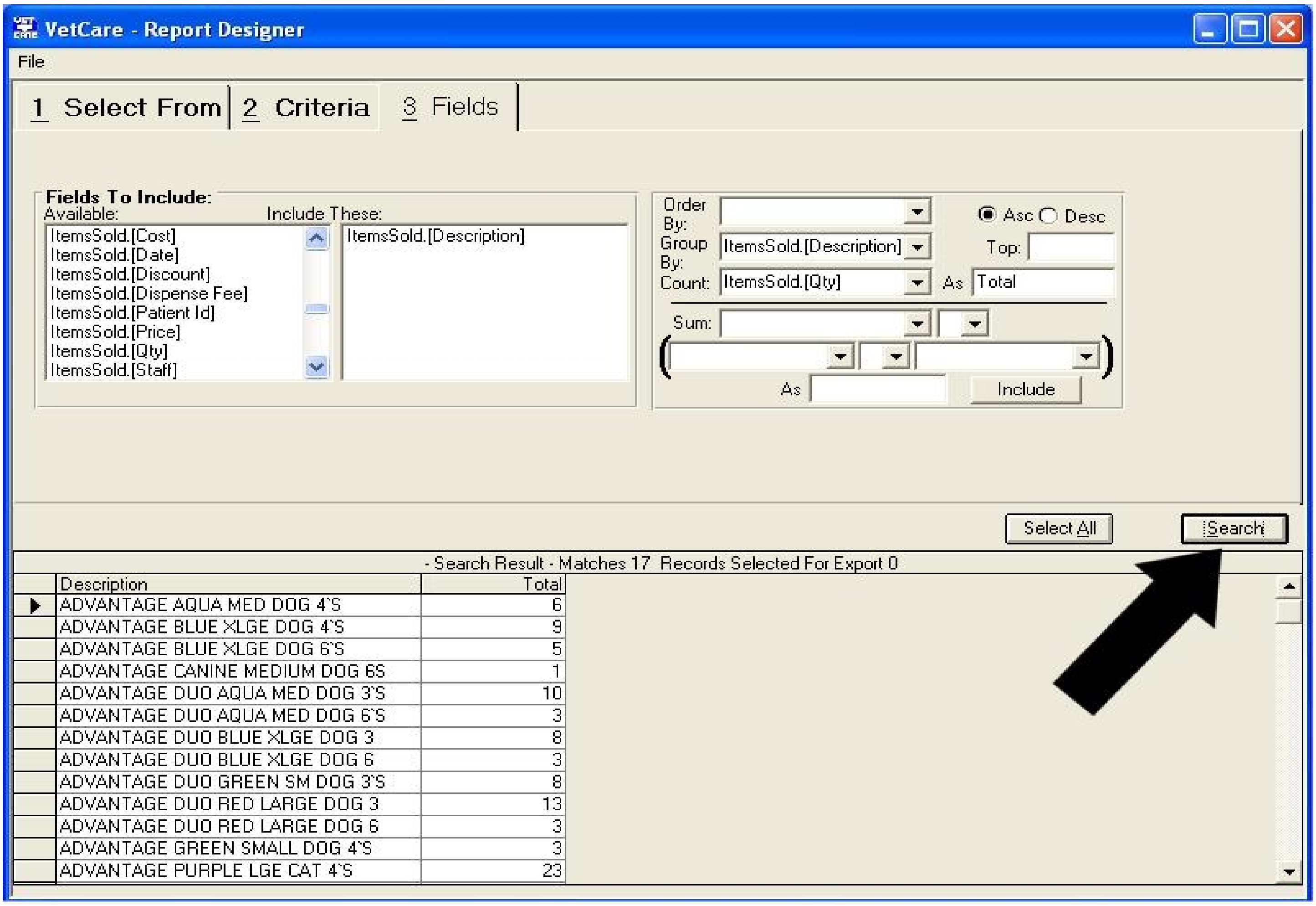


Fig 2.0

Once you have the **'Group By'** and **'Count By'** fields entered you are ready to search the database. Click the **'Search'** button to continue. The program will now use the information you have entered to search the database and return the information you wish to see. (Fig 2.1)

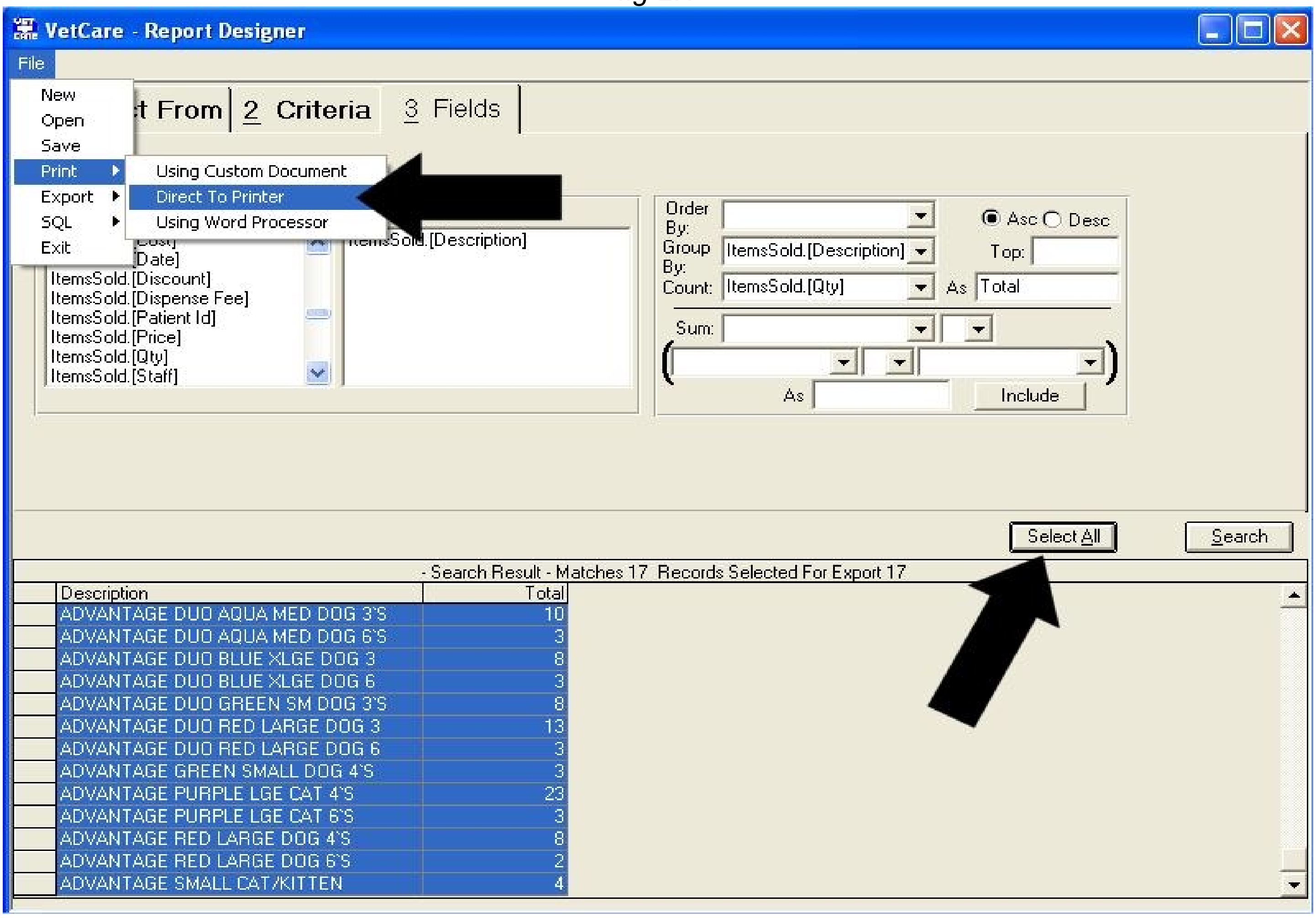
When you have a list of results, you will want to print them for later use. To print the list of results, click the **'Select All'** button to select the results to print, then go to **'File'** at the top of the page, **'Print'**, and . This will print exactly what you see on the screen.

Now you know how to create a report, you can change the description or the dates to suit any report you like.



VetCare - Report Designer
File
1 Select From
2 Criteria
3 Fields
Fields To Include:
Available:
Include These:
ItemsSold.[Cost]
ItemsSold.[Date]
ItemsSold.[Discount]
ItemsSold.[Dispense Fee]
ItemsSold.[Patient Id]
ItemsSold.[Price]
ItemsSold.[Qty]
ItemsSold.[Staff]
ItemsSold.[Description]
Order By:
Asc
Desc
Group By:
ItemsSold.[Description]
Top:
Count:
ItemsSold.[Qty]
As
Total
Sum:
As
Include
Select All
Search
- Search Result - Matches 17 Records Selected For Export 0
Description
Total
ADVANTAGE AQUA MED DOG 4'S 6
ADVANTAGE BLUE XLGE DOG 4'S 9
ADVANTAGE BLUE XLGE DOG 6'S 5
ADVANTAGE CANINE MEDIUM DOG 6S 1
ADVANTAGE DUO AQUA MED DOG 3'S 10
ADVANTAGE DUO AQUA MED DOG 6'S 3
ADVANTAGE DUO BLUE XLGE DOG 3 8
ADVANTAGE DUO BLUE XLGE DOG 6 3
ADVANTAGE DUO GREEN SM DOG 3'S 8
ADVANTAGE DUO RED LARGE DOG 3 13
ADVANTAGE DUO RED LARGE DOG 6 3
ADVANTAGE GREEN SMALL DOG 4'S 3
ADVANTAGE PURPLE LGE CAT 4'S 23

fig 2.1



VetCare - Report Designer
File
New
Open
Save
Print
Export
SQL
Exit
Using Custom Document
Direct To Printer
Using Word Processor
t From
2 Criteria
3 Fields
ItemsSold.[Discount]
ItemsSold.[Dispense Fee]
ItemsSold.[Patient Id]
ItemsSold.[Price]
ItemsSold.[Qty]
ItemsSold.[Staff]
Order By:
Asc
Desc
Group By:
ItemsSold.[Description]
Top:
Count:
ItemsSold.[Qty]
As
Total
Sum:
As
Include
Select All
Search
- Search Result - Matches 17 Records Selected For Export 17
Description
Total
ADVANTAGE DUO AQUA MED DOG 3'S 10
ADVANTAGE DUO AQUA MED DOG 6'S 3
ADVANTAGE DUO BLUE XLGE DOG 3 8
ADVANTAGE DUO BLUE XLGE DOG 6 3
ADVANTAGE DUO GREEN SM DOG 3'S 8
ADVANTAGE DUO RED LARGE DOG 3 13
ADVANTAGE DUO RED LARGE DOG 6 3
ADVANTAGE GREEN SMALL DOG 4'S 3
ADVANTAGE PURPLE LGE CAT 4'S 23
ADVANTAGE PURPLE LGE CAT 6'S 3
ADVANTAGE RED LARGE DOG 4'S 8
ADVANTAGE RED LARGE DOG 6'S 2
ADVANTAGE SMALL CAT/KITTEN 4

Fig 2.2

Label Printer Setup Windows 95, 98, ME

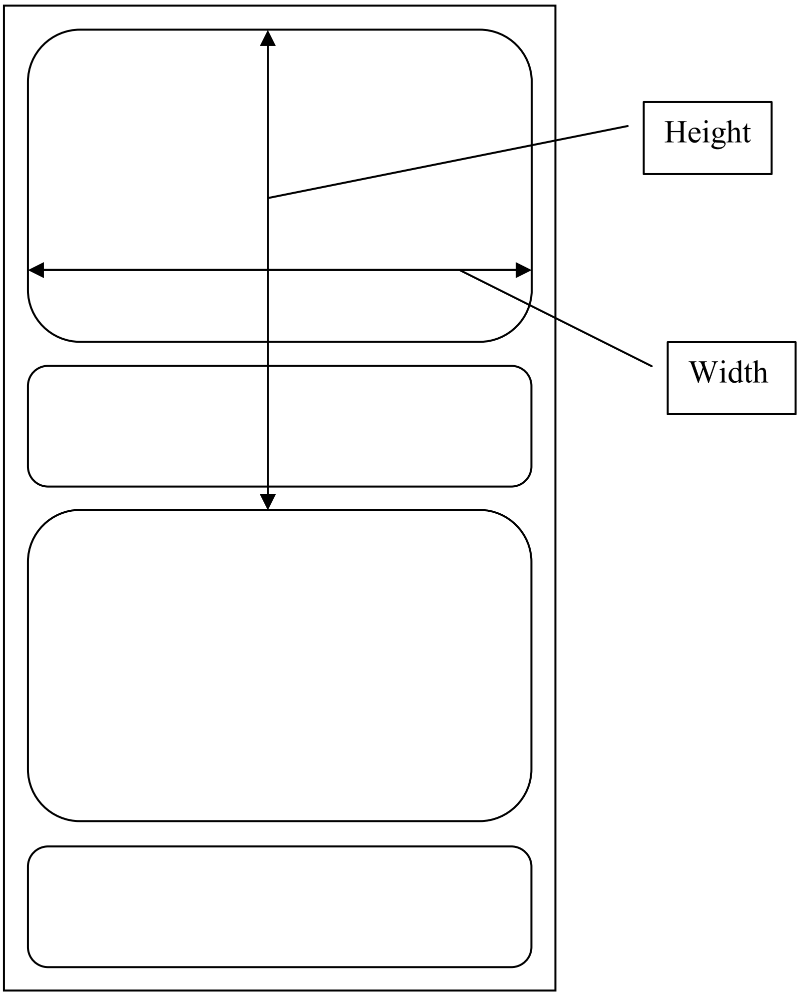
Set new Label Size.

Go to, **START – SETTINGS – PRINTERS**. You will see a list of all printers attached to the system.

Right Click on the label printer and select properties from the menu. This will open the printer properties window. Click the **'Paper'** tab.

You will see a list of paper types. If you scroll to the right hand end, you will see a paper size called **'Custom'**. Click on '**Custom'** to open the measurements window. Enter the length and width of your label. You can leave any margins at zero.

Remember that the length of your label is measured from the top of your first printable label to the top of the next printable label, and width is the width of the label only, not the paper. You can leave the Printer Area Margins at zero. (fig 1.1)



Once you have your new sizes entered, click **OK** to save the setting. Click **OK** a second time to return to the main printers screen.

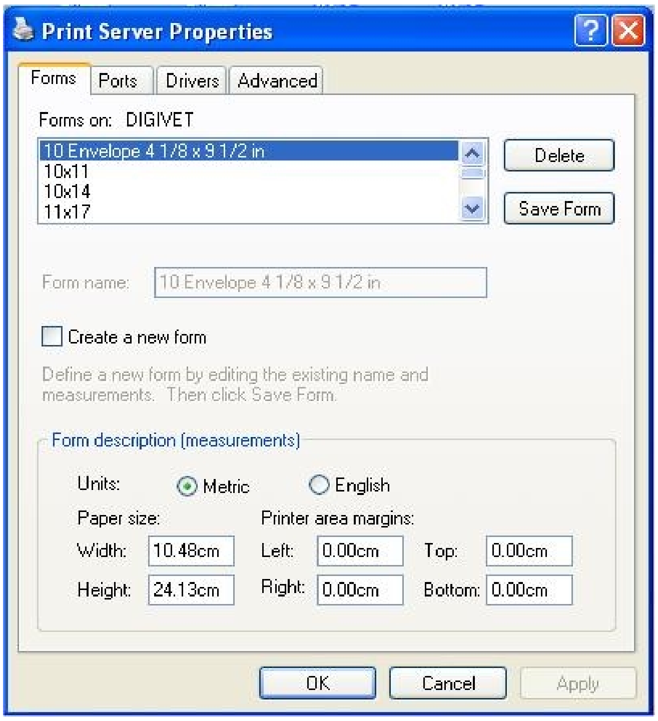
Your printer is now set to the new label size.

Label Printer Setup Windows 2000 & XP

Set new Label Size.

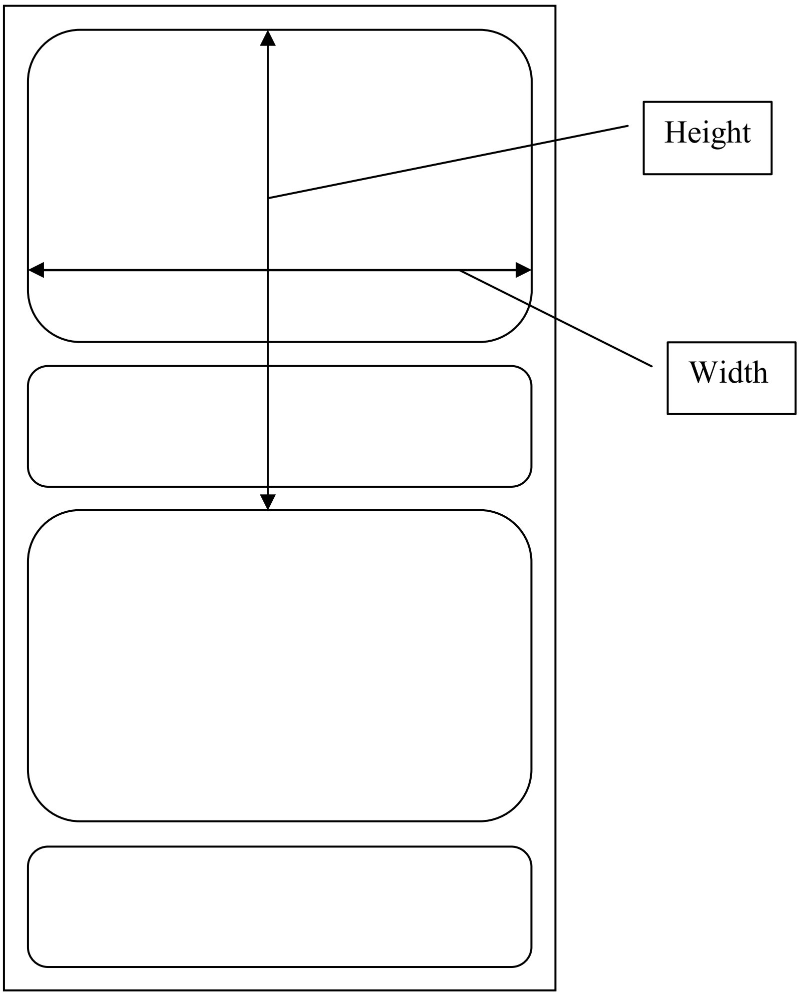
Go to, **START – SETTINGS – PRINTERS**. You will see a list of all printers attached to the system.

At the top of the window, click **FILE – SERVER PROPERTIES**. This will open the print server properties dialogue box. (fig 1.1)



Check the box **'Create a New Form'**, and type a new name in the **'Form Name'** box, (Eg, DrugLabel or Label). Enter in the measurements of your label in the respective fields. Remember that the hight of your label is measured from the top of your first printable label to the top of the next printable label, and width is the width of the label only, not the paper. You can leave the Printer Area Margins at zero. (fig 1.2)

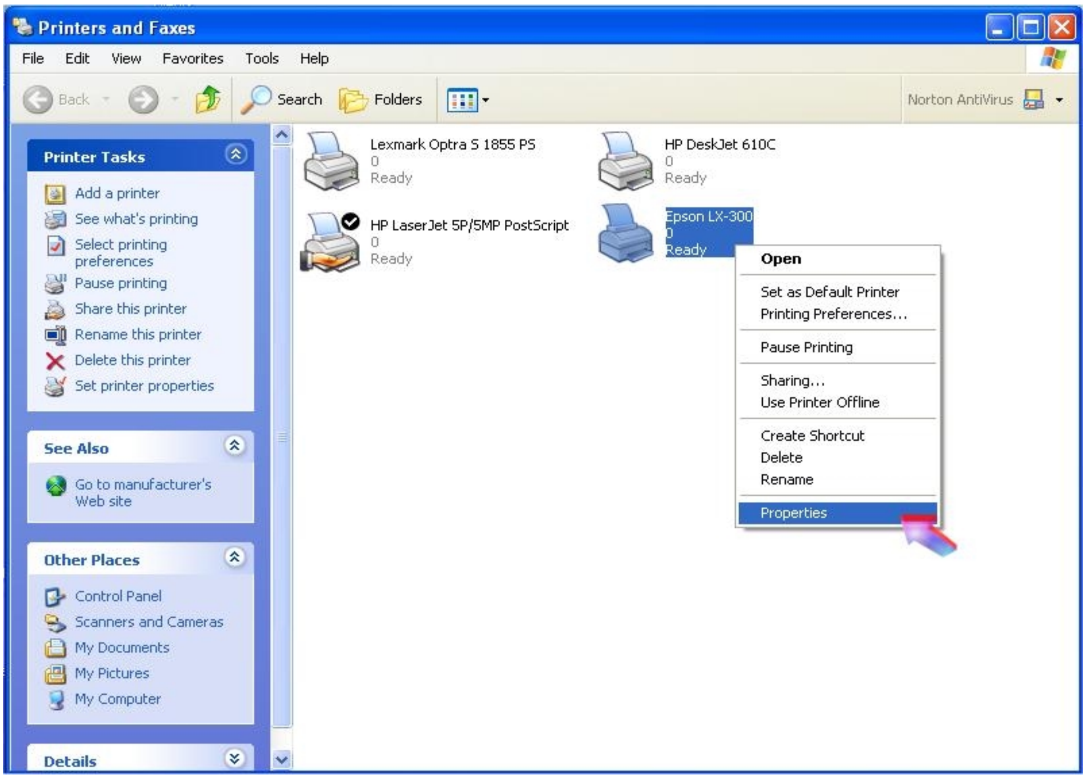
When you have your measurements entered, be sure to click the **'Save Form'** button. Then **OK** or **CLOSE** to finish.



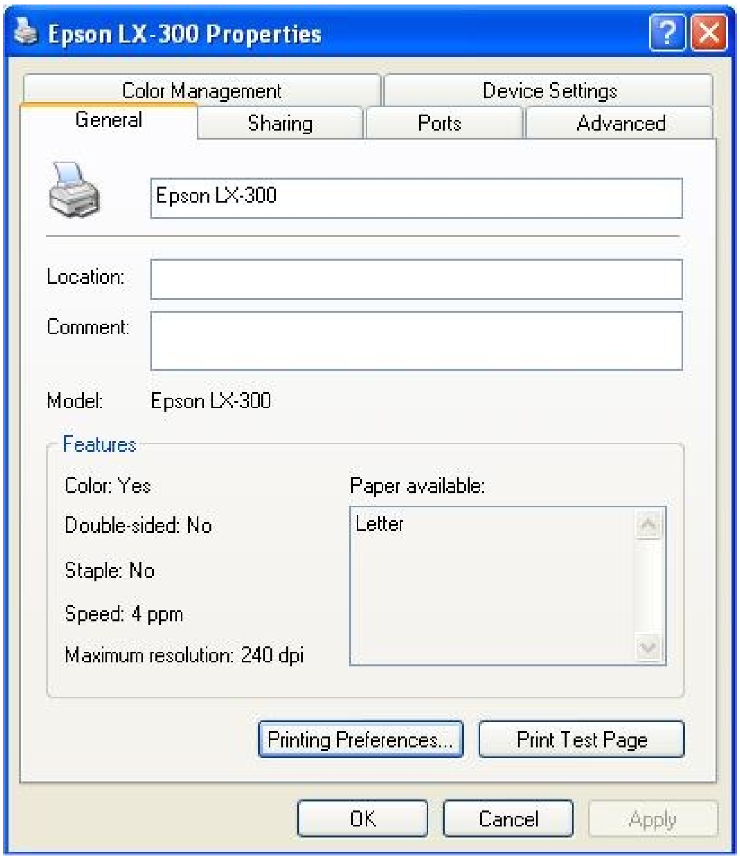
Set the Printer to use new label size.

Go to, **START – SETTINGS – PRINTERS**. You will see a list of all printers attached to the system.

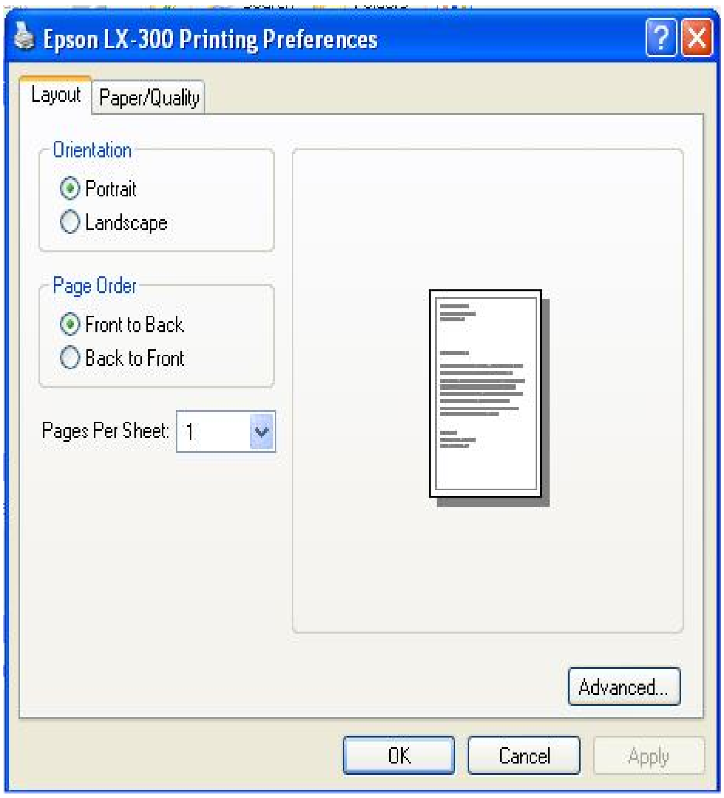
Right Click on the icon of the printer you wish to set the label size on, and click **properties** from the list. (Fig 1.3)



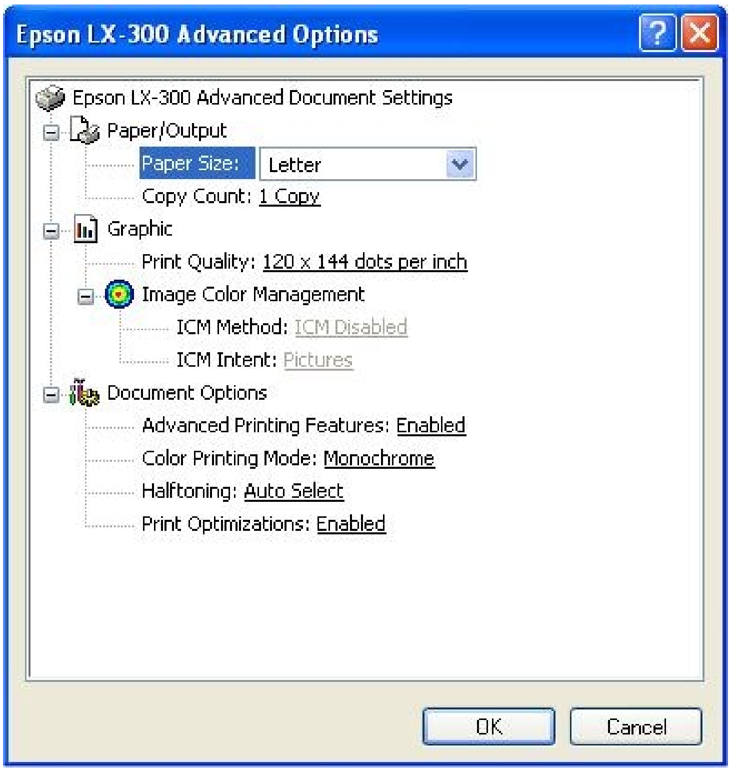
This will open the printer properties dialogue. (Fig 1.4)



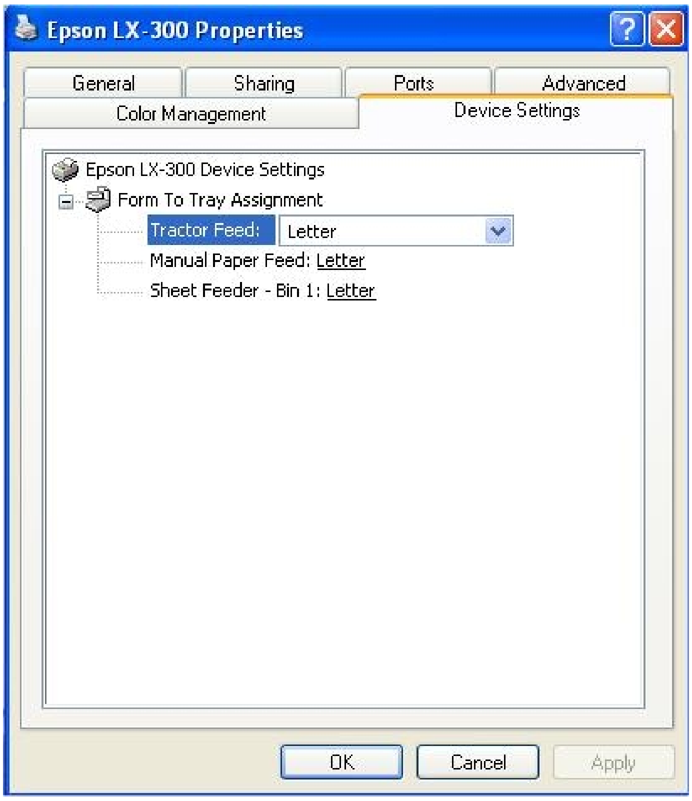
Click the **'Printing Preferences'** button at the bottom of the window. You will now see the Preferences window. (Fig 1.5).



Click the **'Advanced'** button at the bottom of the window. This will open the Advanced Printing window. (Fig 1.6) From the **'Paper Size'** drop down list, select the label you created in the first section of this document, and click **OK**. Click **OK** on the printing preferences window to go back to the main printer preferences window.



Once you are back to the Printing Preferences window, click the **'Device Settings'** tab. (Fig 1.7)



In each of the drop down menus, again select the label you created in the first steps. If a section reads as Letter, then the printer will try and print an A4 sheet. By setting this to label, you are telling the printer to use a much smaller sheet of paper.

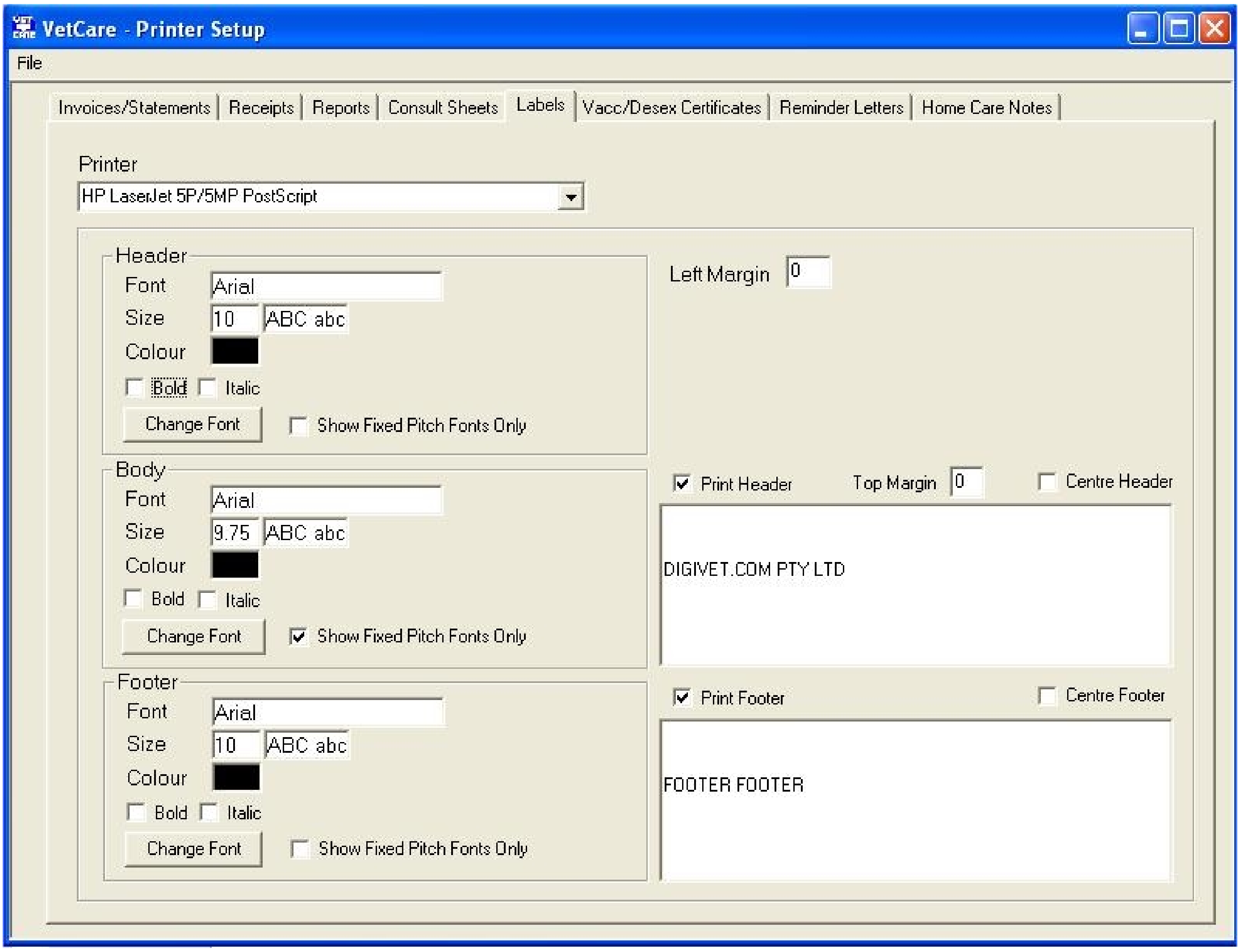
When each paper feed is specified as your label, you can click OK to finish.

Your printer is now setup to print on your labels.

Label setup in VetCare

This how-to will help you setup VetCare to print your details on all labels.

Open VetCare.
From the main screen click, **OPTIONS – SETUP – PRINTERS**. This will open the printer setup screen. Click on the **LABELS** tab to see the settings for your labels. (Fig 1.0)



The printer dropdown box at the top of the window refers to the printer on your system that vetcare is going to use for printing labels. If this is not the correct printer, dropdown the menu and select the correct one.

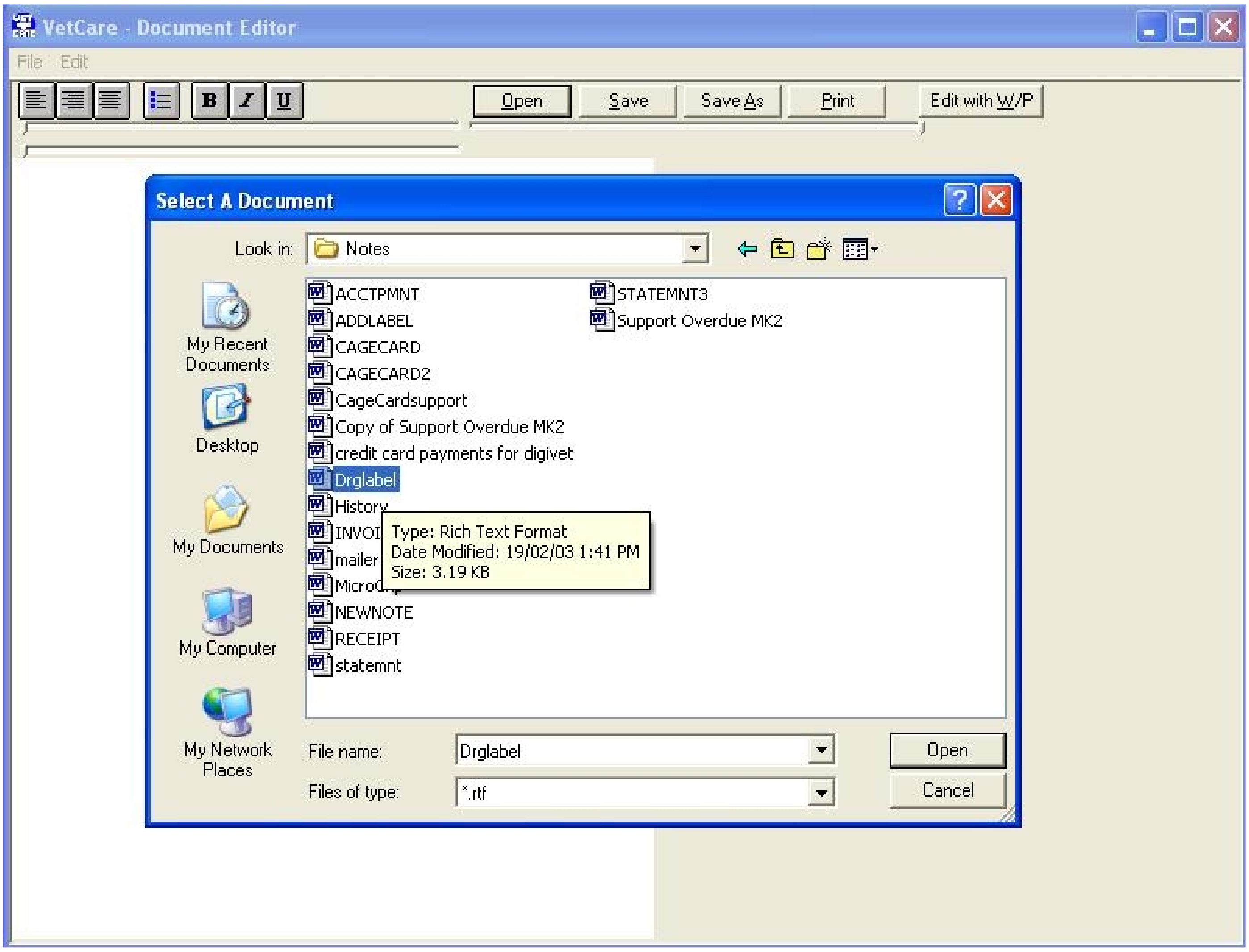
The three boxes down the left hand side of the window refer to the three sections of the label. Header is the top of the label, Body is the centre section, and footer is the bottom. Body is the information you have entered into a consult or from the print label screen. Vetcare fills this in for you.

To place your clinic details etc on the top of the label, tick the box in the centre of the window, **'Print Header'**. Now enter the information you want to print at the top in the text box below. Whatever is typed in this box will appear at the top of each label. To print footer, do the same.

Some trial and error may be needed to get the header and footer to align properly with the rest of your label.

When you are happy with the setup, click, **FILE - EXIT**, to save your settings and return to the main screen.

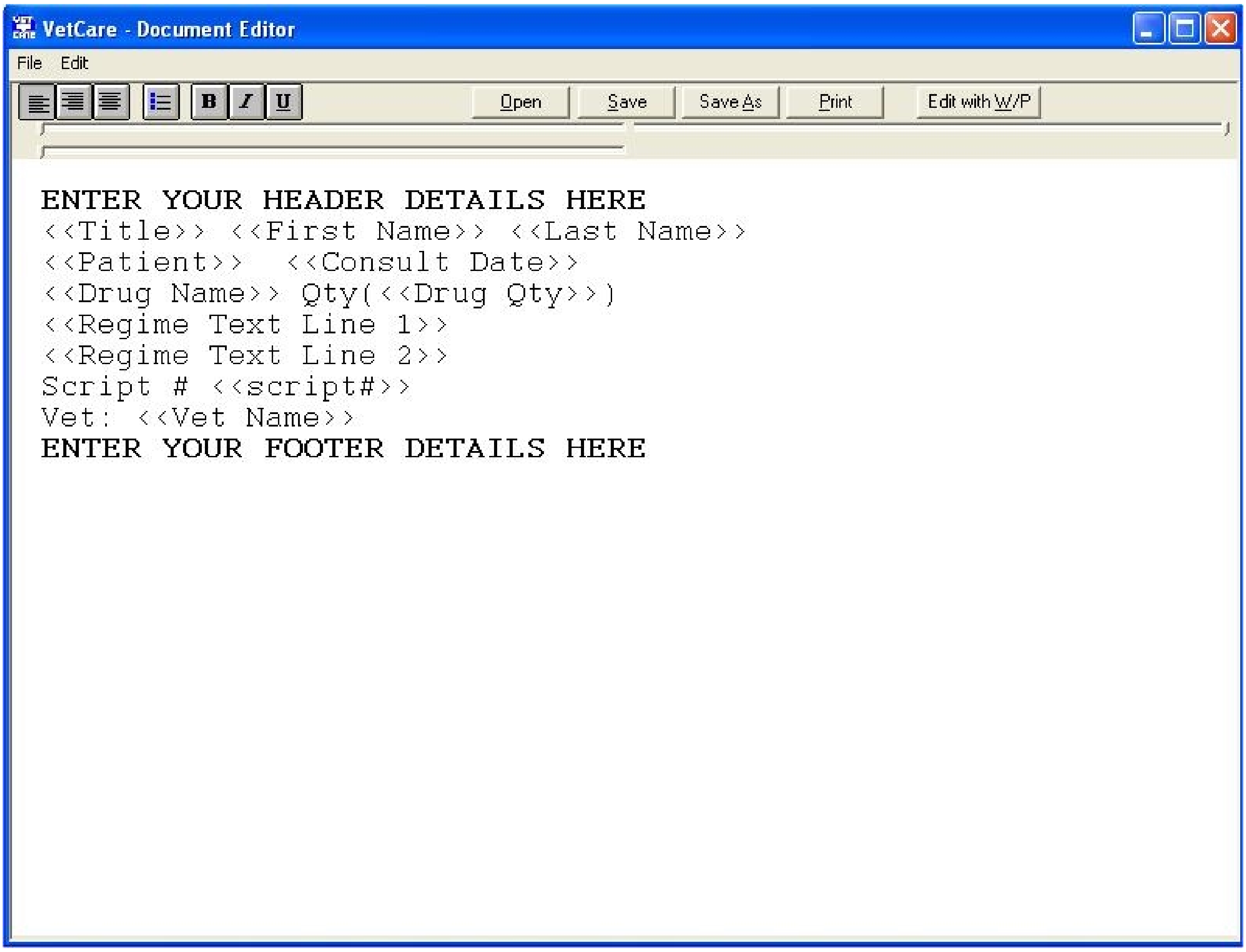
Depending on your version of VetCare, you may also be able to edit the drug label document directly. To do this, click, **OPTIONS – SETUP – DOCUMENTS**. This will take you to the document editor screen. (Fig 1.1)



Click the **OPEN** button and browse to the **NOTES** folder. This is where most VetCare documents are kept.

You should see a document called **DRGLABEL**. Double click the document or highlight it and click open to edit the document. (Fig 1.2)

Once the document is open, you will be able to modify the layout of the label, and add your own clinic details to the top and bottom of the document. (Fig 1.3)



Any text surrounded by **'<<' or '>>'** are fields that Vetcare will automatically enter when printing a label.

When you are happy with the way it looks, Click the **SAVE** button to save your changes.

You will now be able to print a label with your details automatically placed on the top and bottom.

Applying a VetCare Update from CD or Floppy Disk

This how-to will step you through the process of applying a Vetcare update.

You will normally have downloaded the Vetcare update from our website (www.onecom.com.au), or have received the update on cdrom from the helpdesk.

Once you have downloaded the update file (update.zip), copy the file the Vetcare folder in you local hard drive. The same applies if you received the update on cdrom. Copy the update the Vetcare folder on you local hard drive. The update.zip file is contained in a folder named 'Latest update' on the cdrom.

Once you have copied the file, you must complete a normal backup.

Failure to backup the VetCare system before updating may cause loss of valuable data.

Once the backup has been completed, reopen Vetcare. From the OPTIONS menu, select UPDATE VETCARE from the list. (Fig 1.1)

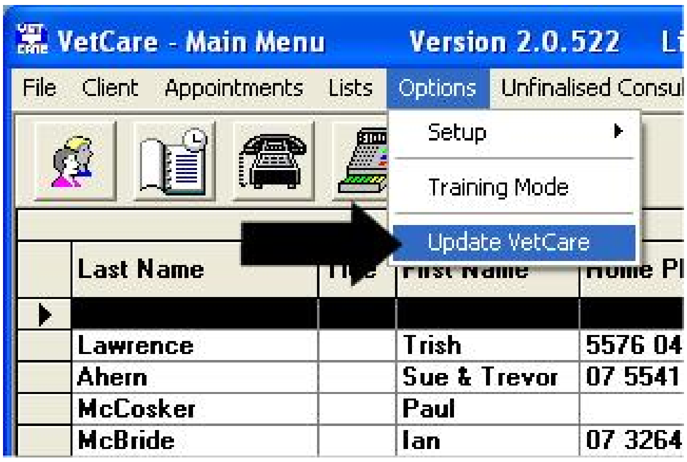


Fig 1.1

Selecting UPDATE VETCARE will open a second window over the top of the main Vetcare window. This window will give you several options for updating Vetcare. (Fig 1.2) The options are each explained below.

1. Load update from floppy disk. This will load the update from a floppy disk. Use this option if you have copied the update file to a floppy disk.

2. Load update in Vetcare folder dated ##/##/## This will load any update file you have placed in the Vetcare folder. Use this option if you copied the update file to the Vetcare folder on your local hard disk.

3. Use update on server dated ##/##/## This option applies to workstations only. Use this option if you have already updated the server. Older versions of Vetcare will not have this option.

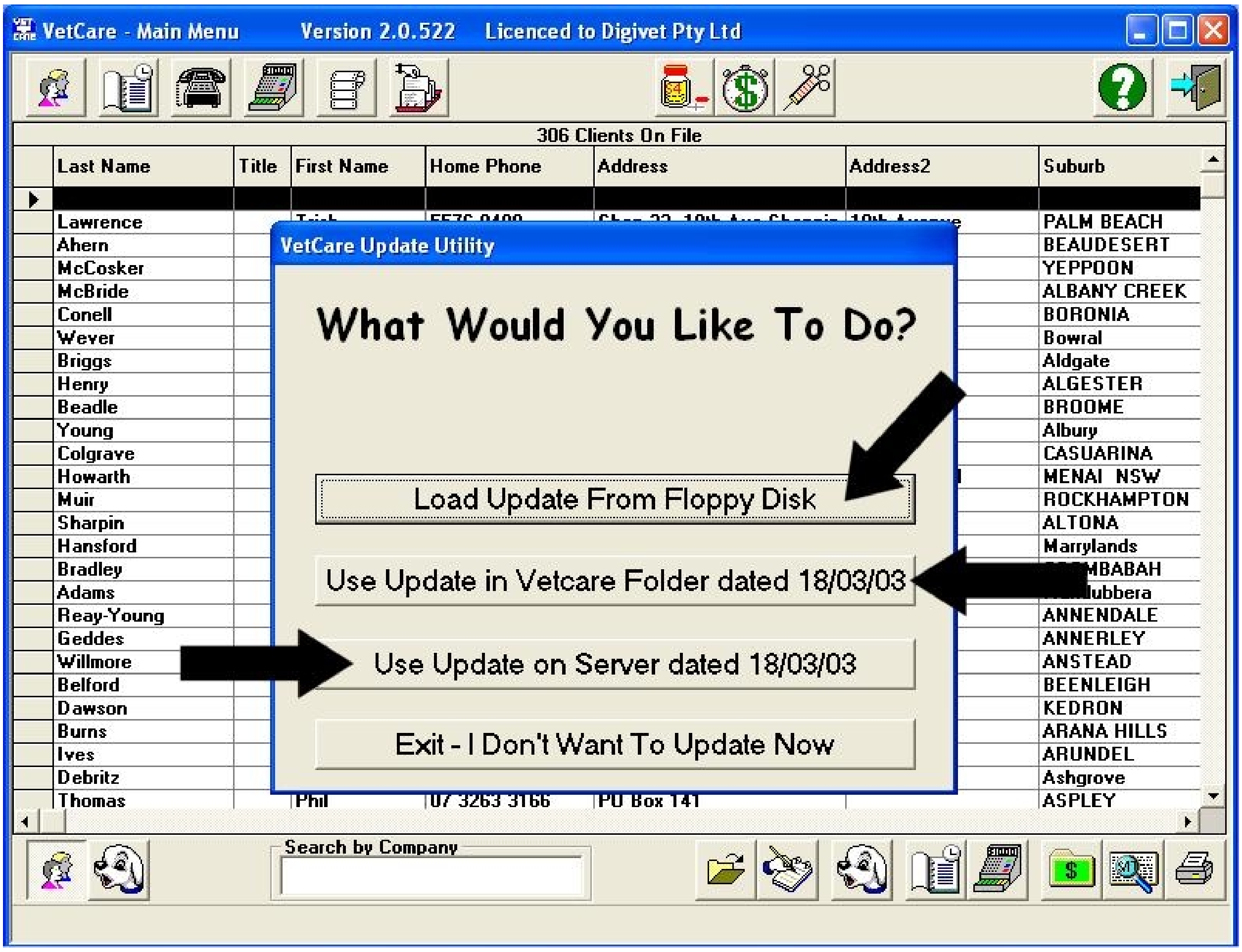
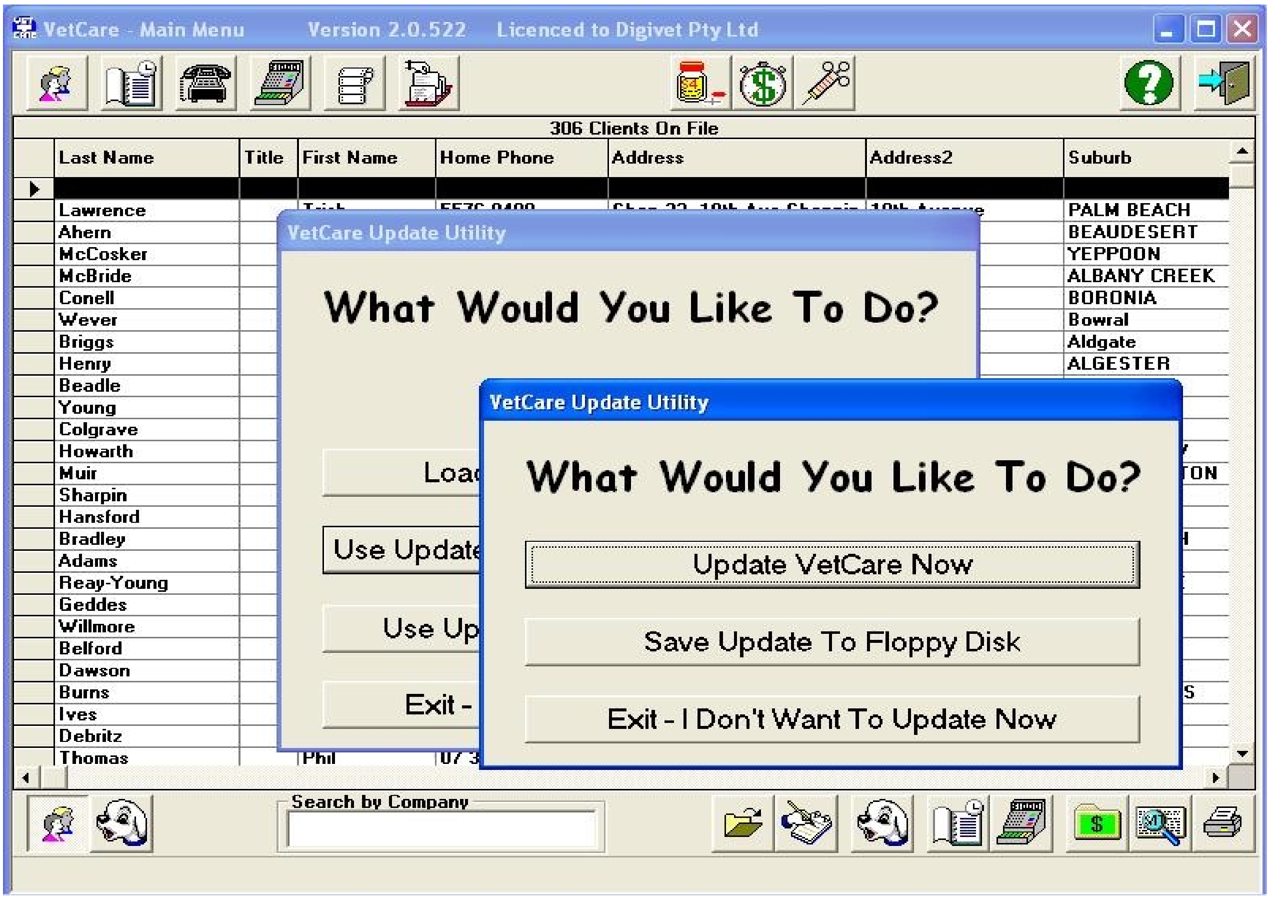


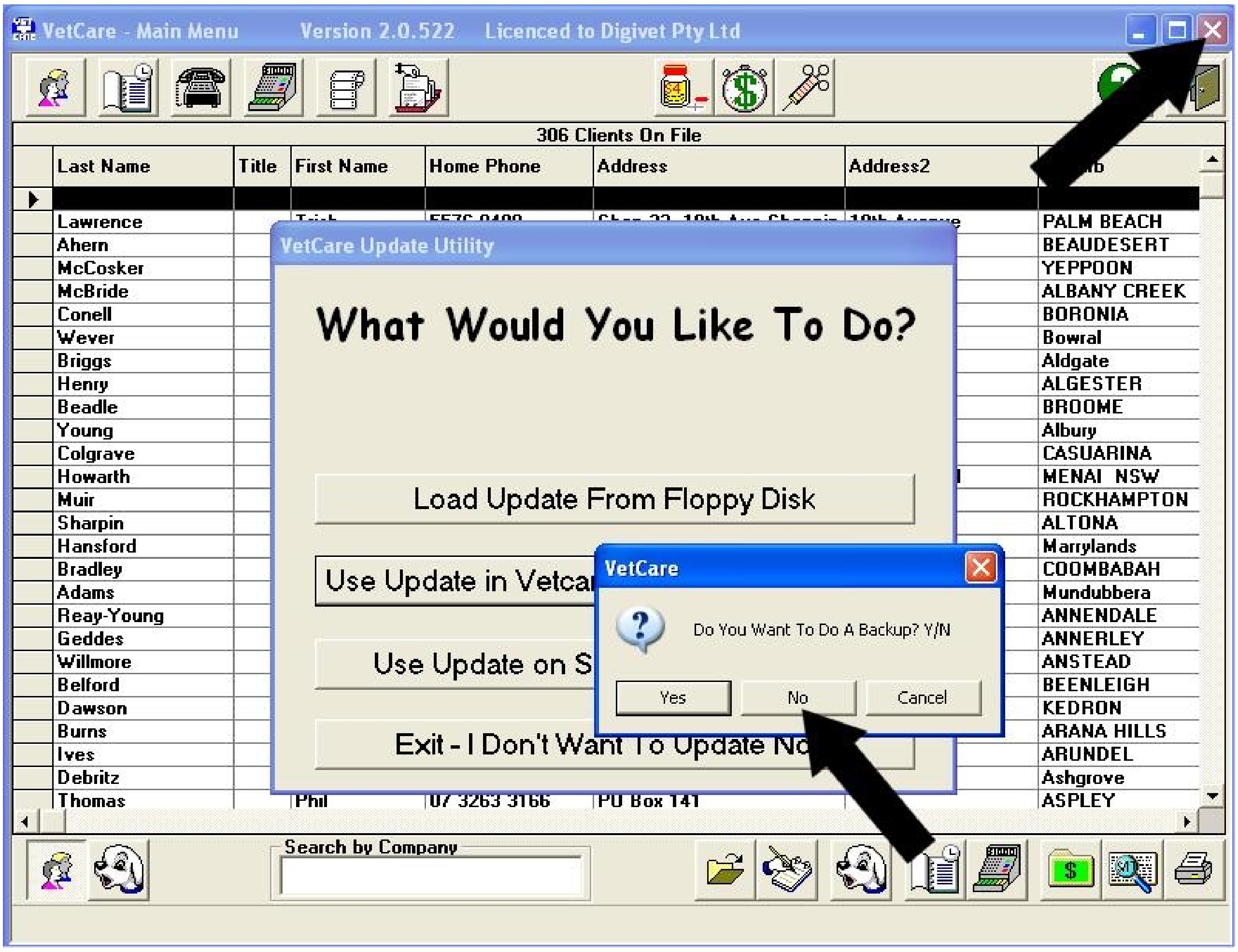
Fig 1.2

Select the option that applies to where you have placed the update file.

Once you have made your selection from the list (Fig 1.2), the screen will again change and you will be presented with a second window. If you can still see the main Vetcare screen in the background with this window over the top, (Fig 1.3), you will have to close Vetcare manually. Simply hit the X in the top right corner, and select NO to a backup. (Fig 1.4) When it is correct, you should only have the update menu on the screen. (Fig 1.5)

Fig 1.5


VetCare - Main Menu Version 2.0.522 Licenced to Digivet Pty Ltd
306 Clients On File
Last Name
Title
First Name
Home Phone
Address
Address2
Suburb
VetCare Update Utility
What Would You Like To Do?
VetCare Update Utility
What Would You Like To Do?
Update VetCare Now
Save Update To Floppy Disk
Exit - I Don't Want To Update Now
Search by Company
Fig 1.3


VetCare - Main Menu Version 2.0.522 Licenced to Digivet Pty Ltd
306 Clients On File
Last Name
Title
First Name
Home Phone
Address
Address2
VetCare Update Utility
What Would You Like To Do?
Load Update From Floppy Disk
VetCare
Do You Want To Do A Backup? Y/N
Yes
No
Cancel
Search by Company
Fig 1.4

Once you have only the update menu on the screen, you can go ahead and click the UPDATE VETCARE NOW button. A warning screen will appear reminding you to complete a backup before proceeding (Fig 1.6). Click OK to continue. Once the update has completed you will see a screen notifying that the update was completed successfully. (Fig 1.7)

Fig 1.6

Fig 1.7

Once the update has completed, Click OK to restart Vetcare. As Vetcare restarts you should see a small window appear. This is the Vetcare database update utility. (Fig 1.8) You will only see this on the server, workstations will not show it. If you do not see this after updating Vetcare, then the program hasn't updated correctly. Try running the update again, if it still doesn't work, contact the Vetcare helpdesk.

Fig 1.8

Once the database update utility has finished, you should be back at the main Vetcare screen. You will notice a new version number at the very top of the main screen.

If you have any problems, or questions, please contact the vetcare helpdesk.

<u>HOW TO MAP A NETWORK DRIVE</u>

Error: The drive X:\vetcare\vetcare.mdb cannot be accessed when starting vetcare.

Take note of the missing drive letter, this letter refers to the missing network drive e.g.: The drive **<u>X</u>**:\vetcare\vetcare.mdb cannot be accessed. “X” is your network drive.

First, try restarting the computer where the error occurs, this may fix the problem. If not, proceed to the next step.

Open “Network Neighborhood” can also been known as “My Network Places” depending on your Windows version.
You will see a list of computers and some extra icons. If you can see the main computer (your server), double click its icon, you will then see a list of folders available to map to.

Right Click on the folder you wish to map (usually “C”). From the menu, select “Map Network Drive”. Select the drive letter from the list that corresponds to the drive letter that VetCare is looking for (e.g.: “X:”). Make sure the box “Reconnect at logon” is checked and click ok.

Some windows may appear showing the contents of the new network drive, you can close these down.
Again, try to start Vetcare. It now should start correctly.