THE DOCUMENT MANAGER

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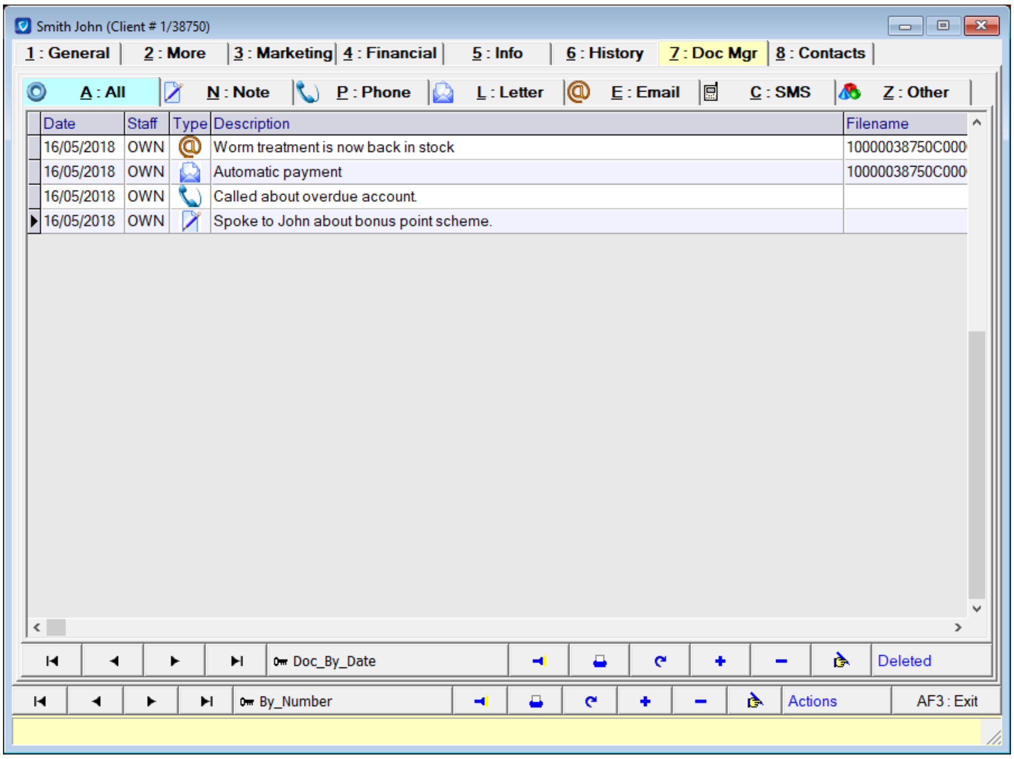
OVERVIEW

The document manager is used to store communications you have concerning a staff member, client, animal, supplier or product. There are six types of default communication types available with a seventh option that allows you to link to any type of electronic document on your computer that has software installed to read it.
Communication Types:

A: All	Displays all communications that have been entered for this record.
N: Note	Displays all of the notes that have been entered for this record.
P: Phone	Displays all of the phone calls that have been manually entered for this record.
L: Letter	Displays all of the letters that have been entered for this record. You can set up letter templates for letters that are sent out frequently.
E: Email	Displays all of the emails that have been sent for this record.
C: SMS	Displays all the SMS messages that have been sent for this record from within VetlinkPRO.
Z: Other	Allows you to add other types of documents that are stored on your computer. The only prerequistite for viewing these documents is that you have an application installed on your computer that can open them.

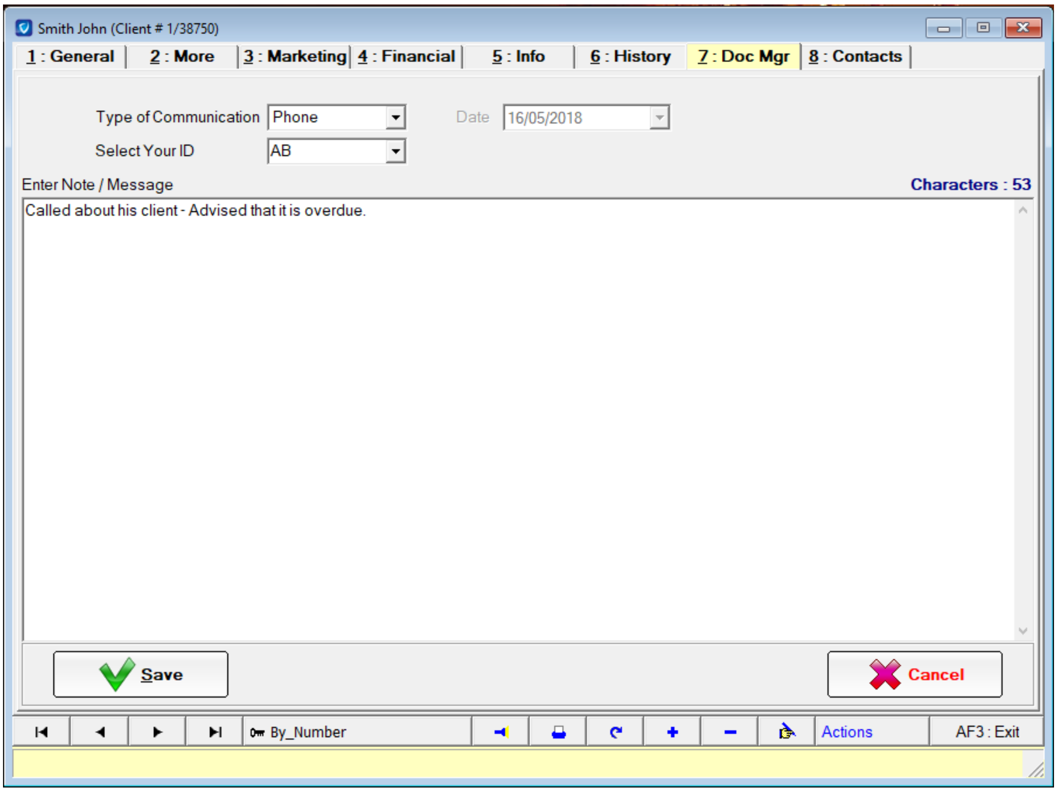


HOW TO ADD NEW DOCUMENTS

Adding a Note / SMS or Phone Message

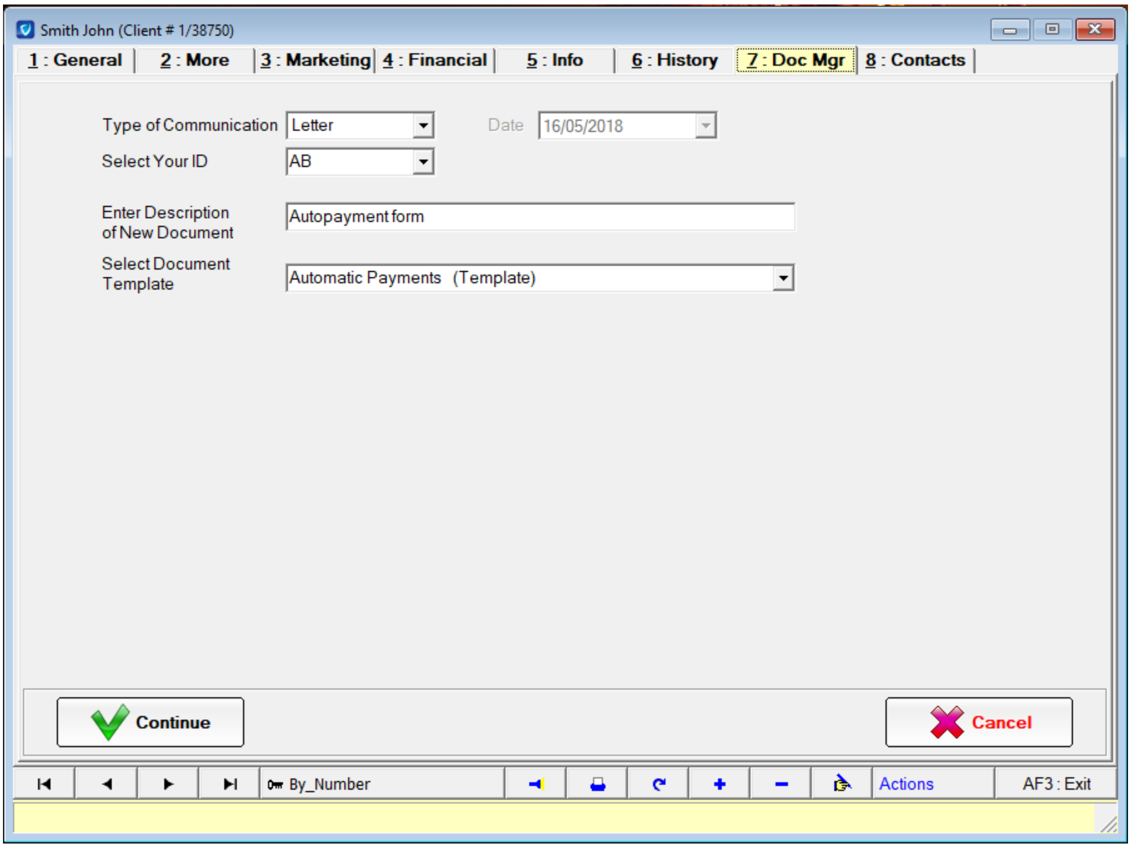
The process for adding a note, SMS or phone message is the same in all document manager sections in VetlinkPRO.

1. Click on the **'Staff'**, **'Client'**, **'Animal'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on either the **'Note'**, **'Phone'** or **'SMS'** tab depending on the type of communication you are adding.
5. Click on the plus button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.
6. A phone, note or SMS form will open up.
7. Enter your staff ID in the **'Select Your ID'** field.
8. Enter in the contents of your message and when finished click on the **'Save'** button. If you have created an SMS message and have purchased the SMS module, a text message will be sent to the client.



Adding a New Letter

1. Click on the **'Staff'**, **'Client'**, **'Animal'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on the **'Letters'** tab.
5. Click on the **'+'** button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.



6. Enter your staff ID in the **'Select Your ID'** field.
7. Enter a description of the letter.
8. Select the template you wish to use for this document. If you wish to start from a blank document choose **'Word Document (Not Mailmerged, Blank)'** or **'Mailmerged Document (Blank)'** for the template.
9. Click on **'Continue'** and the word processor will open the document.
10. You can now edit the document. Once you are finished click on the **'Save'** button (the save button is a disk icon which is found in the top left corner of the word processor).

How to Create Letter Templates

VetlinkPRO allows you to create templates for documents that are used frequently in the system. You can also add mail merge variables to these documents for the quick and easy creation of letters.

1. Click on the **'Options'** menu and then on **'Pick Lists Setup'**.

2. Depending on where you want to add the letter template click on the client, staff, product, Patient or supplier option.

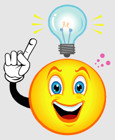
3. Double click on **'Letter Templates'**.

4. A new form will open listing all the templates currently in your system.

5. To add a new form, click on the plus button in the bottom left hand corner.

6. Enter a template name and click **'OK'**.

7. The word processor will now open for you to create the letter.



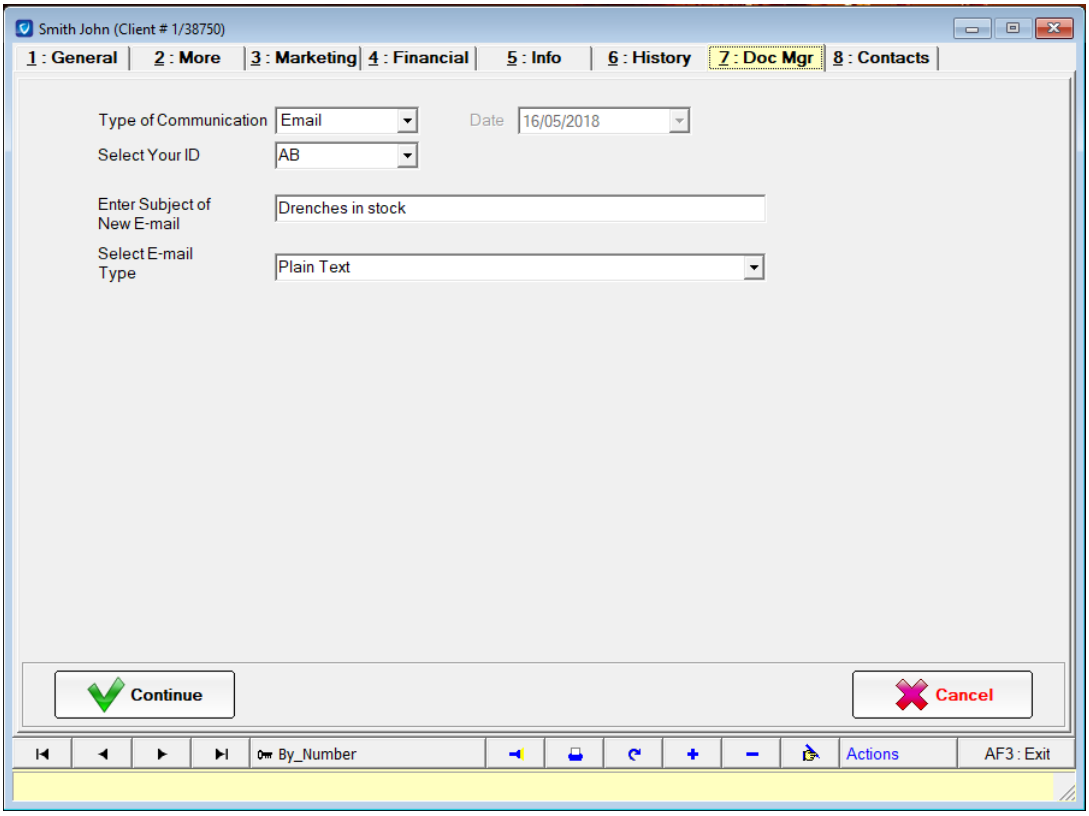
TIP: You can add mailmerge variables to the letter by clicking on the **'Insert Merge Field'** button. This is useful for generic letters where you wish to show client or product specific details. For example, a letter can have mail merge variables of the first and last name of the client. When the letter is merged and printed the client's name from the client record you are looking at will be merged into the letter in place of the mail merge variables.

8. Once you are happy with your template you can save the letter and exit from the template editor and pick lists setup.

9. Your template should now be available in the document manager.

Sending a New Email

1. Click on the **'Staff'**, **'Client'**, **'Animal'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Click on the **'Email'** tab.
5. Click on the **'+'** button on the document manager tool bar. Don't click on the plus button on the very bottom toolbar, this is for adding a new client.



6. Enter your staff ID in the **'Select Your ID'** field.
7. Enter the subject of the email.
8. Select the type email you wish to send. You can choose either **'Enhanced (HTML)'** or **'Plain'**. An enhanced HTML email allows you to create a formatted email with pictures, logos etc., a plain email allows you to create a simple text email.
9. Click on **'Continue'** and the email word processor will open.
10. You can now edit the document.
11. Once you are finished click on the **'Send'** button.

How to Link Other Types of Files to Document Manager

VetlinkPRO also allows you to link to most types of documents that are already saved on your computer and you can open them directly from VetlinkPRO as long as you already have software installed that can open these documents.

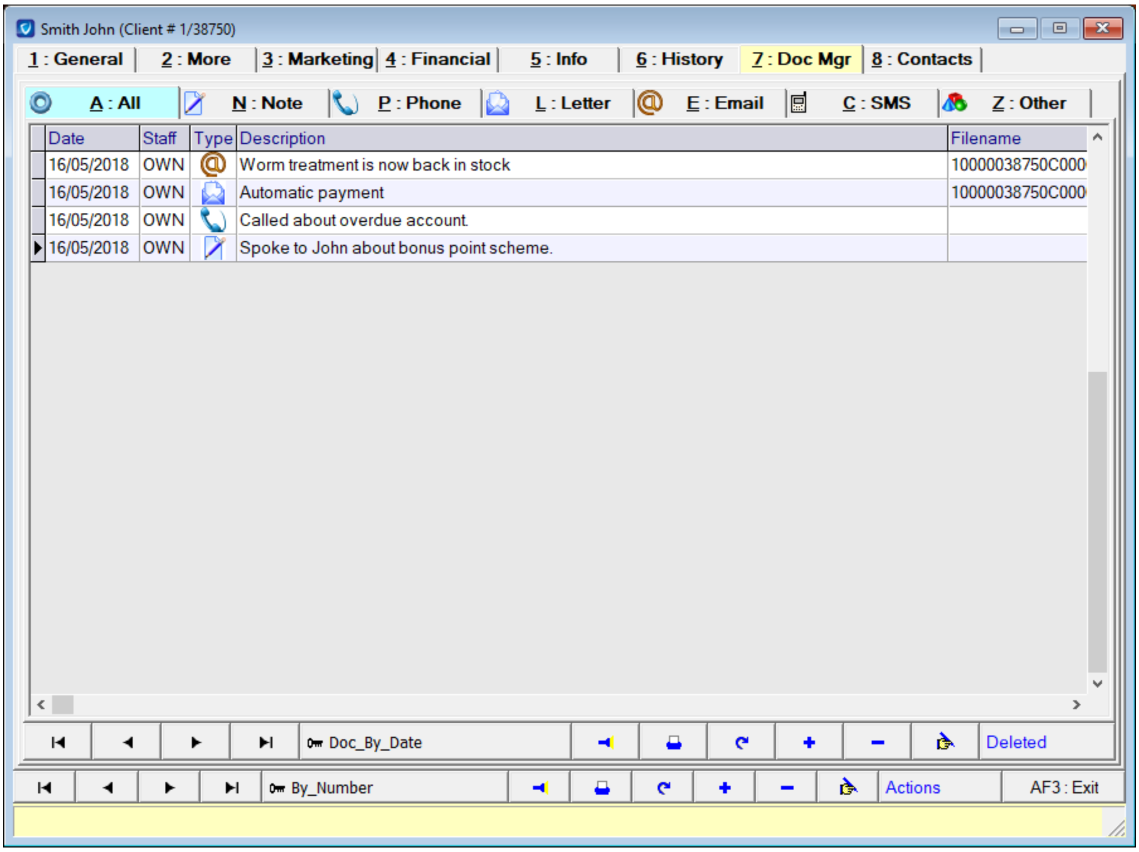
For example, you may have a letter a client has emailed to you as an attachment that you want to keep on file. This letter can be saved in the Document Manager, and can be in any format that can be opened directly from Windows Explorer. Double-clicking on the document once it is in document manager will open the program associated with that particular file to view it. (e.g. Word for doc files, Excel for .xls files). You can save these electronic documents against “Client”, “Product”, “Supplier” and “Staff” records.

1. Click on the **‘Staff’**, **‘Client’**, **‘Animal’**, **‘Supplier’** or **‘Product’** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **‘Doc Mgr’** tab.
4. Click on the **‘Other’** tab.
5. Click on the **‘+’** button on the document manager tool bar. Don’t click on the plus button on the very bottom toolbar, this is for adding a new client.
6. A new form will open.
7. Enter your staff ID in the **‘Select Your ID’** field.
8. Enter a description of the document and click the **‘Continue’** button.
9. A windows **‘Open File’** form will now appear. Browse through your documents and select the file you wish to link to VetlinkPRO.
10. The document should now be linked to VetlinkPRO and when you double click it, it should open with the appropriate program that is already installed on your computer.

NOTE: These files are not backed up by the Vetlink backup utility. You must backup these files yourself.

How to View Existing Communications

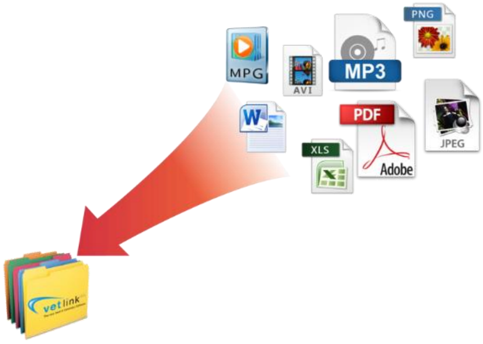
1. Click on the **'Staff'**, **'Client'**, **'Animal'**, **'Supplier'** or **'Product'** button.
2. Search for the record that you wish to add communications to.
3. From the record you have just opened, click on the **'Doc Mgr'** tab.
4. Select the type of document you would like to view for the staff, client, animal, supplier or product.
5. To view any of the communications listed simply double click on one of them.



Editing Document Manager Descriptions

The descriptions of attachments and letters can be edited in the document manager by right clicking on the document and selecting Edit Description.

AUTOMATIC FILE ATTACH



VETLINKPRO can attach a variety of different files to client, animal, product and supplier records, as well as Patient clinical histories automatically based on the name of the file. This is achieved by placing the files into a special folder called **VL2ATTACH** that will be created on the same drive as your VL2 server installation after the upgrade. VETLINKPRO continuously checks this folder and any files placed here will be imported into VETLINKPRO automatically and then removed from the VL2ATTACH folder. Files attached to clinical history will also go into **Endorse Lab Reports** so users can double check files have gone to the correct clinical history or be moved to the correct Patient if there is a mistake.

Accepted File Types

PNG, JPG, JPEG, BMP, GIF, DCM, PDF, MPEG, MPG, AVI, WAV, MP3, DOC, DOCX, XLS, XLSX

File Naming

The naming convention for attaching files is as follows:

- The first character is an alphabetic character, anyone of **A, P**, **C**, **S**, **U**, **R**, **G** or **H**. This indicates the file destination within VETLINKPRO. A description of each is shown below.

A	Animal/Patient document manager
P	Animal/Patient document manager
C	Client document manager
S	Staff document manager
U	Supplier document manager
R	Referral clinic document manager
G	Product document manager
H	Clinical history attachment

- Only ex-merging users that have some records starting with different numbers i.e. 2/1234 or 5/6789 will need to follow this step, all other users can skip it entirely. The next two characters are a number followed by '**-**', such as '**1-**', used to indicate the branch number. In non-merging, single database environments these characters can be excluded.

- The last portion of the file name is a number consisting of a maximum of 11 digits indicating the record number the file is to link to. If the intended file destination is document manager, use the record number as displayed in VETLINKPRO (client number, or Patient number etc.). If the intended destination is clinical history use the Patient number, the file will attach to the last open bill if present otherwise one will be created.

- E.G. **A12345.DOC** will attach to Patient #12345's document manager
  E.G. **A1-12345.DOC** will attach the Patient #12345's document manager
  E.G. **H12345.JPG** will attach to the clinical history of the last OPEN bill for Patient #12345
  E.G. **C98765.PDF** will attach to client #98765's document manager

- The description can be added by adding a space after the Patient / client number then typing in the name. E.g. "C22592 Credit agreement.pdf". When imported any text after the animal/client number and the space will be used as the description in VetlinkPRO. If no description is entered the animal/client number will be used instead. The description can be a maximum of 12 characters.

- **TIP:** On most flatbed scanners you can choose the location to save scanned images to. Just choose the VL2ATTACH folder as the location and save the file with the appropriate filename. VETLINKPRO will then automatically attach the file to the correct location for you. **TIP:** Remember to set the DPI for scanning images to a low value so you are no storing large images and taking up disk space. E.g. 300 dpi for images, 150 dpi for text.

- **TIP:** You may also want to create a shortcut to the VL2ATTACH folder on each user's desktop or add the VL2ATTACH folder to the favourite's toolbar in windows explorer. This will make the folder easy to find for each user to place files into.