

# VACCINATION REMINDERS

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# REMINDER SET UP

## Creating a New Reminder Type

1. Click on the **'Options'** menu and select **'Pick Lists Setup'**.
2. Click on **'Misc'** and double click on **'Reminder Types'**.
3. The reminder List will open. All your reminder types will be listed here. To enter a new reminder, click on the red plus button at the bottom of the screen.
4. Select **'Yes'** to the prompt and the **'Reminder Type'** window will open.
5. Enter in the relevant fields to set up the reminder.

<b>Number:</b>	System number generated by VetlinkPRO
<b>Name:</b>	Name of the reminder.
<b>Type:</b>	Whether the Reminder is a vaccination or recall.
<b>Animal Types:</b>	Click in the animal types field to open a new selection grid where you can select which animals will receive that reminder.
<b>Default Period:</b>	This field specifies the length of time until the reminder is due.
<b>Period Type:</b>	Related to the default period, and indicated whether the period is in days, weeks, months or years.
<b>Status:</b>	Whether the reminder is active or inactive
<b>Non Repeating:</b>	When un-ticked, this field indicates that when this reminder has expired another reminder, shown by the <b>'Next Rem Type'</b> , will be generated automatically.
<b>Next Rem Type:</b>	The next reminder that will be generated when the current reminder expires.

6. Select **'F12: Accept'** to save and exit the reminder.

## Adding a Reminder to Product

1. Create a new product or search for and select the product you wish to add a reminder to.
2. On the 'General' tab select the reminder you wish to use from the 'Rem Type' drop down menu.



**NOTE:** Reminders are mainly used with Kitset, Surgery and Vaccination type complex products. For Kitsets, the reminders are triggered by the 'Rem Type' setting on the component's product record. As Kitsets permit multiple components, the sale of Kitsets may trigger multiple reminder prompts at billing - one for each component with a reminder set. The same applies to Surgery products. In the case of Vaccination products however, the reminder is controlled by the 'Rem Type' setting on the master product.

**Product Information:**

- Name: Cat Vaccination
- Class: Service
- Category-1: Vaccine
- Category-2: Default
- Ann Types: \*ALL\*
- Action: None
- Rem Type: (Dropdown)
- Label Typ: Tablet
- Status: Active
- User Code: CATVACCINA
- Complex: Vaccination
- Reporting: No

**Pack Prices (exc Tax)**

List Price	-	Buy Discount	=	Usual Buy Price
\$0.000		0.000 %		\$0.000
	+	Markup	=	Sell Price
		0.000 %		\$88.890

Buy Size: 1      Cost: \$0.000

**Prices inc Tax**

Units	Dose Size
1	1
Unit Cost	Dose Cost
\$0.00	\$0.00
Unit Sell	Dose Sell
\$102.220	\$102.220
Pack Sell Price	
\$102.220	

**Image:** A photograph of a white cat.

**Footer:** V.L.2 Cat Vaccination (Product# 1/9960) | Ctrl+N | Actions | AF3: Exit

## Setting Up New Vaccination Complex Products

When setting up a vaccination it is highly recommended that you use the complex product type of Vaccination. The vaccination complex product is a service with hidden drug components. It will allow you to incorporate a service fee in the vaccination as well as recording the drugs that were used. More than one drug can be attached to the vaccination with its own reminder and when a tax receipt or statement is printed only the vaccination service will show.



**NOTE:** If you are unsure about setting up complex products, read the Complex Products chapter in the manual before proceeding.

Item	Description	Prd_Num	Qty	Dur	Price	Reminder Type
1	Vac 1	# 1/9956	1		\$15.000	Cat Vaccination
2	Vac 2	# 1/9957	1		\$15.000	Cat Vac 2
3	Vac 3	# 1/9959	1		\$20.000	Cat Vac 3

1. Create drug products for all the drugs to be used whilst performing the vaccination or identify the existing drugs you wish to use.
2. Set the **'Label Typ'** on the drugs as **'Vaccination'** if you wish to print vaccination labels.
3. Create a new vaccination product with the class type **'Service'** and set the pack sell price.
4. Go to the **'Complex'** tab of the master vaccination product and set **'Complex Type'** to **'Vaccination'**.
5. Next click on the **'Plus'** button and add all the drugs components you wish to add to the complex product.
6. Within the complex tab still, look for the **'Reminder Type'** column and choose any reminders you wish to apply from the drop down list.

7. Set the quantity of each drug you will be using, the price of the drug can be changed from the drug product record.
8. You can also set a reminder for the master vaccination product if you wish by changing the **'Rem Type'** and on the **'General'** tab. If you are getting double-ups of reminders when billing, ensure that you don't have the same reminder set on both the master vaccination and component drug products.

## Configuring Reminder Colours on the Animal Record

Reminders on the animal record can display in three different colours depending on when they are due. These options can be found under [Options | Setup | Misc | Reminders | Reminders to be Shown \(Grids\)](#).

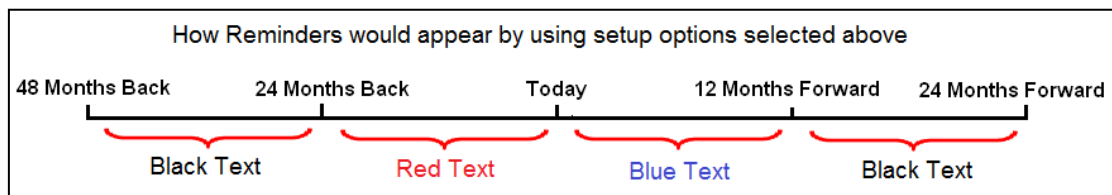
<b>Mths to Look Backward</b>	Reminders falling within this date range will appear as black text unless a reminder is already appearing in red or blue text.
<b>Mths to Look Forward</b>	Reminders falling within this date range will appear as black text unless a reminder is already appearing in red or blue text.
<b>Mths Backward in Red</b>	The number of months that the system looks back to determine whether to display reminders on the animal record in red text (as opposed to black).
<b>Mths Forward in Blue</b>	The number of months that the system looks forward to determine whether to display reminders on the animal record in blue text (as opposed to black).

**Reminder Due to be Shown (grids)**

Mths to Look Backward (0-48)

Mths to Look Forward (0-48)

Show as Red when Due is  mths in the past to 1 month ahead.



## Configuring Reminder Window at Billing

### Previous Reminders to Mark as Done

The reminder window at billing is split into three sections; **Previous Reminders Due**, **Batch Details** and **Reminders to Record**. The Previous Reminders Due section can be configured to your preferences as to which reminders appear for selection and also which reminders due are automatically ticked to mark as done.

1. Go to **'Options'** and then select **'Setup'**.
2. Log in with the highest access level you have.
3. Click on the **'Misc'** button and then on the **'Reminders'** tab.
4. For the **'Reminders Due Shown to Mark as Done'** fields specify how many months the reminders window will display due reminders for. This setting is just for showing the reminders not ticking them as well.
7. For the **'Reminder Due Auto Marked as Done'** specify which of these reminders will automatically be set to mark as done. E.g. Ticked. If you do not wish any reminders to be automatically marked as done, choose the number zero for each. Tick the **'Mark same Type Only'** if you only wish due reminders of the **same type** as the next reminder you are about to add to be marked as done.

### Record Expiry Date for each Batch

The reminder window at billing can record the batch date and expiry date for drugs that were used during the animals visit. This information will also be saved against the vaccine for the next time the vaccination is billed so you should only have to enter in the batch number and expiry date once, unless a new batch is being used. Entry into this field can be made mandatory or optional.

1. Go to **'Options'** and then select **'Setup'**.
2. Log in with the highest access level you have.
3. Click on the **'Product'** button and then on the **'1: Options'** tab.
4. If you wish entry of the batch details to be mandatory tick the **'Record Expiry Date for each Batch'** option.

# CREATING NEW REMINDERS

## Adding a Reminder to an Animal from a Bill

Vaccination "Cat Vaccination" for Percy

Reminders due from 23/03/2009 to 23/04/2011

Mark As Done	Reminder	Due On	Action
<input checked="" type="checkbox"/>	BVD vax annual	31/03/2011	

Batch Number / Reminders to Record

Name	Batch #	Expiry	Next Reminder	Due On	Record Rem	Action
Cat Vaccination			Vaccinations	23/04/2011	<input checked="" type="checkbox"/>	
Vac 2	FE #1234	31/07/2010	Cat Vac 2	23/04/2011	<input checked="" type="checkbox"/>	
Vac 3			Cat Vac 3	23/04/2011	<input checked="" type="checkbox"/>	
Vac 1			Cat Vaccination	23/04/2011	<input checked="" type="checkbox"/>	

Esc: Cancel      F12: Accept

Please verify the Batch Number and Expiry Date of Cat Vaccination

1. Create a new bill.
2. Add a product with a reminder attached to it.
3. The vaccination details screen will open. (See **Error! Reference source not found.**, page **Error! Bookmark not defined.**). Check that the details are correct. The reminder form is split into three sections; **Previous Reminders Due**, **Batch Details** and **Reminders to Record**.

### A

#### Previous Reminders Due

The previous Reminders Due section will list all the reminders for the animal that are still due. If the reminder has been done you need to put a tick in the 'Mark as Done' check box. Alternatively if the reminder is still due remove the tick. Population of reminders in this section is controlled by options in set up. Please refer to the Configuring the Reminders Window section for more information.

### B

#### Batch Details

The Batch details section is used to record the batch number and expiry date for drugs that have been used. Options in setup control whether filling in these fields is mandatory or not. Please refer to the Configuring the Reminders Window section for more information.

## C

**Reminder To Record**

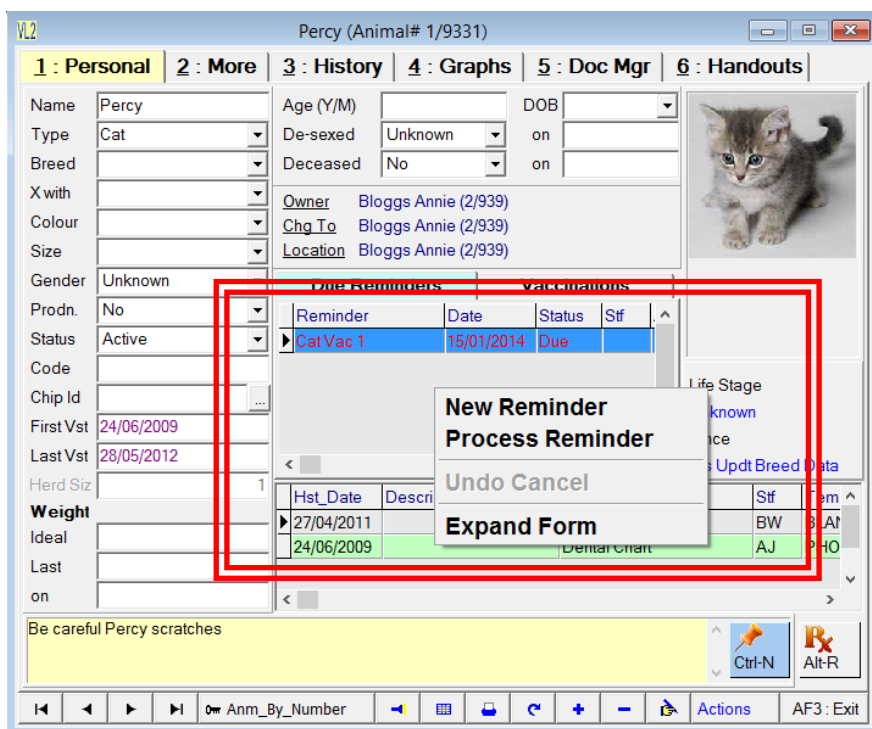
The Reminder to Record section is where you record reminders. To record a reminder, select the 'Next Reminder' and 'Due On' information and ensure that the 'Record Reminder' tick box is ticked. You are also able to untick 'Record Reminder' for any of the reminders if you do not wish them to be recorded. Please note that the drug details are recorded against the animal regardless of whether a reminder is recorded or not.

4. Click 'F12: Accept' to the reminder details form and then finish the bill.
5. The Animal record will now be automatically updated with the new reminder details.

**Adding a Reminder from the Animal Record**

If you have not created a bill but would like to add a reminder to an animal you can do so from the animal record by following the steps below.

1. Search for and open the animal record.
2. Right click on the due reminders grid and choose 'New Reminder'.
3. Select 'Yes' to the prompt and a new form will open.
4. You will now need to enter the Staff member who is creating the reminder, the type of reminder and the due date for the reminder. Any further details can be added in the actions field.



## PRINTING A REMINDER LIST

A reminder list shows summary of the reminders for a specified period. This list will show the client name, animal name, reminder, due date and client contact number. You will normally generate this list when confirming appointments.

1. Click on the **'Reports'** button
2. Double click on **'Reports/Lists'**.
3. Click on **'Client'**.
4. Double click on **'Reminder List'**.
5. Choose the relevant filters to generate the report:

<b>Branch:</b>	If you are running a multi-branch system, select the branch which you wish to generate the reminder list for.
<b>Anm Status:</b>	Whether you want reminders for active or inactive animals.
<b>Anm Type:</b>	The type of animals you wish to generate the reminder list for.
<b>Rem Type:</b>	The type of reminder you are generating the list for, either vaccination or recall.
<b>Reminder:</b>	This field lets you choose a specific reminder to generate the list for.
<b>Rem Status:</b>	Whether you wish to generate a list of Due, Cancelled, Done or All reminders.
<b>Due Range:</b>	The period for which you wish to generate the reminder list for.

6. Click on the **'Next'** button when you have chosen your filters.
7. Click on the **'Print'** button to print or the **'Preview'** button to preview the report.

# VIEWING REMINDERS

## Browse Reminders

The browse reminders function allows you to quickly generate a list of reminders for a specified period. When the list is generated you are then able to update the reminder status, contact clients or view animal details.

1. Click on **'Utilities'** and then **'Browse Reminders'**.
2. The **'Browse Reminders'** form will open. Select the relevant option to open the reminder list.

<b>Branch:</b>	If you are running a multi-branch system, select the branch which you wish to generate the reminder list for.
<b>Vax / Rcl:</b>	The type of reminder you are generating the list for, either vaccination or recall.
<b>Reminder Type:</b>	The type of reminder you are generating the list for, either vaccination or recall.
<b>Animal Types:</b>	The type of animals you wish to generate the reminder list for.
<b>Period:</b>	Select from the list the period you wish to view reminders for.
<b>From:</b>	If range was selected for the period you can select the date range here.
<b>Include Cancel &amp; Done:</b>	Cancelled and Done reminders will be included in the list if this option is selected.
<b>Include Inactive Clients and Animals:</b>	Inactive clients and animals will be included in the list if this option is selected.

3. Click the **'OK'** button to generate the reminder list.
4. The reminder list will now show, you can double click on a line to view that reminder.

## Viewing Reminder Details from the Animal Record

VetlinkPRO allows you to view reminders for animals directly from their animal record. A number views are available depending on the detail you wish to see and you can view all reminders including cancelled, done and due. Double clicking on one of the reminders will allow you to update the reminders status.

- In the centre of the animal record you can view the reminders that are due. Double clicking on a line will open that reminder
- The oldest reminders will display first. If you cannot see all the reminders you can right click on the Due Reminders grid and choose expand form. This will open an adjustable form to display all the reminders.
- To view all reminders including cancelled and done, click on the 'F7: Rem' button at the bottom of the screen. This will open a new form to view all reminders for that animal.

Client MrMrs Lindsay\_Robyn Aldersea  
 Phones H:5141 1933  
 Address 10 Edward Street  
 Maffra VIC 3860

Animal Fluffy  
 Gender male  
 Type Cat  
 Breed DLH  
 De-Sexed N

**Reminder Details**

Staff   
 Type FELINE LEUKAEMIA VACCINATION  
 Action

Created 7/01/2016  
 Due 7/01/2017  
 Done Not yet

Reminder Run First Rem Sent On Second Rem Sent On Third Rem Or Later Sent On  
 0

F6: Mark As Due F7: Mark As Done F8: Mark as Cancel

**Reminders**  Vax Only  Show Due  Show Done  Show Cancelled

Status	Due	Rem Type	Staff	Action
▶ Due	7/01/2017	Feline Leukaemia Vaccination		

0 Rem\_By\_Sub\_Num

# SENDING REMINDER LETTERS/ EMAILS OR SMS

## How to Set Up a Generic Reminder Letter

1. Click on the **'Reports'** button.
2. Double-click on the **'Reminders / Recalls'** button.
3. The report properties window will open.
4. Next click on the **'Add New'** button.
5. Click **'Yes'** to the **'Design New Report'** prompt.
6. In the **'Name'** field enter the name for the letter, email or SMS (e.g. Vaccination Letter).
7. From the **'Printer'** drop down list, choose the printer to which this document will print if it is a letter.
8. From the **One Entry Per** drop down list select how many reminders to send if multiple reminders exist for a client.

<b>Client</b>	If multiple reminders exist, by setting the <b>One Entry Per</b> field to <b>Client</b> , a mailer will only be sent for the first reminder due for the client.
<b>Animal</b>	If multiple reminders exist by setting the <b>One Entry Per</b> field to <b>Animal</b> , a separate mailer will be sent for the first reminder due for each animal the client has.
<b>Reminder</b>	If multiple reminders exist by setting the <b>One Entry Per</b> field to <b>Reminder</b> , a separate mailer will be sent for ALL reminders due for the client.
<b>Letter</b>	If multiple reminders exist by setting the <b>One Entry Per</b> field to <b>Letter</b> , all the reminders due for the client will be merged into one mailer.  To use this setting you must also insert the <b>Reminder_List</b> mail-merge variable into your mailer.

9. Under the **'Use Client Marketing Tab'** section, select which clients to send documents, emails or SMS messages to by clicking on the drop down list in each field. This section uses the information set up in the client record.

### Document

<b>Don't Send:</b>	Letters will not be generated for clients.
<b>If Address Entered:</b>	In the client record under the <b>'General'</b> tab, if an address is entered, a letter will be created for that client.
<b>If Reminders checkbox Ticked in 'By Post':</b>	In the client record under the <b>'Marketing'</b> tab, if the <b>'Reminders'</b> check box is ticked in the <b>'Send By Mail'</b> section, a letter will be created for that client.

### Email

<b>Don't Send Emails:</b>	Emails will not be generated for clients.
<b>If Email Entered:</b>	In the client record under the general tab, if an email address is entered, an email will be created for that client.
<b>If Reminders checkbox Ticked in 'By Email':</b>	In the client record under the <b>'Marketing'</b> tab, if the <b>'Reminders'</b> check box is ticked in the <b>'Send By Email'</b> section, an email will be created for that client.

### Txt / SMS

<b>Don't Send Smss:</b>	SMS's will not be generated for clients.
<b>If Mobile Entered:</b>	In the client record under the <b>'General'</b> tab, if a mobile number is entered, an SMS will be created for that client.
<b>If Reminders checkbox Ticked in 'By SMS':</b>	In the client record under the <b>'Marketing'</b> tab, if the <b>'Reminders'</b> check box is ticked in the <b>'Send By SMS'</b> section, an SMS will be created for that client.

10. Click on the **'SF6: New'** button to create a new letter. You may do this for each type of communication you wish to use. e.g. a letter, email or SMS.



**NOTE:** In the **'Template to Use'** section you can also choose an existing template and you can then edit this template by clicking on the button on the same line.

**NOTE:** SMS messages are charged per 160 characters sent. If your message is over 160 characters you will be charged for two or more SMS.

11. You will be prompted to enter a file name for your mailer document, enter a filename then click **'OK'**.
12. The word processor will open; enter the text for your mail merge document.
13. When you have finished, click the save button in the top left hand corner. Next click the cross in the top right hand corner to close the window.
14. Now select the **'Exit'** button from the bottom right hand corner of the bulk mailers dialog box.

15. You have now completed setting up your Reminder Letter.

Vaccination Reminder (Report #237)

Name: Vaccination Reminder      Status: [ ]      Profile: DEFAULT

Category: Client      Reminders      Preview: Yes      Reserved: No

Printer: Reports 1      Shared: Yes      Custom Props: No

Print Logo: [ ]      Top Margin: 0      Bottom Margin: 0

Left Margin: 0

Table Link: Cln -> Anm -> Rem

**Use Following Tables**

<input checked="" type="checkbox"/> Clients	<input checked="" type="checkbox"/> Reminders	<input type="checkbox"/> Supplier	<input type="checkbox"/> Referral
<input checked="" type="checkbox"/> Client Address	<input type="checkbox"/> Bills	<input type="checkbox"/> Orders	<input type="checkbox"/> Referral Staff
<input type="checkbox"/> Client Contact	<input type="checkbox"/> Bill Items	<input type="checkbox"/> Inv Goods	<input type="checkbox"/> Referral Clinic
<input type="checkbox"/> Cln Acct Details	<input type="checkbox"/> Products	<input type="checkbox"/> Payments	<input type="checkbox"/> Referral Address
<input checked="" type="checkbox"/> Animals	<input type="checkbox"/> History	<input type="checkbox"/> Referral Contact	

**Special Filters**

One Entry per: Letter

Client Group: None

Bill Type: Animal

Complex Item: Reminder

**Use Client Marketing Tab**

Document: If Reminders checkbox Ticked in "By Post"

Email: If Reminders checkbox Ticked in "By Email"

Txt / Sms: If Reminders checkbox Ticked in "By Sms"

**Template to Use**

Vacc Reminder.RTF      F6 : Edit      SF6 : New

Vac Rem.HTM      F7 : Edit      SF7 : New

SmsRpl.SMS      F8 : Edit      SF8 : New

**F10 : Save**      **Esc : Cancel**

## Using Reminder Based Templates

Reminder based templates allow you to customise the letters/emails to include extra information about the treatment that is required, explain the necessity of the treatment or to include product specific discounts etc. Instead compiling the reminder lists individually for each letter, reminder based templates allow you to compile one list and then the correct letter is chosen based on the template in reminders.

1. Go to **Options > Picklist Setup**
2. Click on the arrow next to **'Misc'** and double click on **'Reminder Types'**
3. Double click on the reminder you wish to use Reminder based templates on.
4. Tick the **'Use Rem Based Template'** check box. This will enable the **'Templates'** tab.
5. From the template tab you can create and edit templates specific to that reminder.
6. If you don't wish to include the reminder mail out when sending all reminders tick the **'Exclude when Sending Mailers for "ALL" reminder'** tick box. E.g. This type of reminder you wish to send separately.
7. If this type of reminder only needs to be sent once then tick the **'Send Reminder Once Only'** tick box. E.g. It might be a reminder for removing Sutures which can be sent just once.



**NOTE:** When using the **'All'** filter option for reminder mail outs, a separate reminder letter/email will be created for every reminder type that has reminder based template selected. If no reminder based template exists, the default template under the reminder/recalls properties will be used.

Reminder Type

Number: # 1/11    Name: Cat Vac 1    Type: Vaccination

Details | Templates | Products

Animal Types: \*ALL\*     Use Rem Based Template

Default Period: 12     Exclude When Sending Mailers for "ALL" Reminders

Period Type: Month     Send Reminder Once Only

Status: Active

Non-Repeating:

Next Rem Type: [ ]

F12: Accept    ESC: Cancel    F1: Help

## Using Run based templates

Run based templates allow you to send a different letter, email or SMS to the client depending on whether it is their first, second or third+ communication on the same issue.

1. Go to **Options > Picklist Setup**
2. Click on the arrow next to **'Misc'** and double click on **'Reminder Types'**.
3. Double click on the reminder you wish to use Run based templates on.
4. Tick the **'Use Rem Based Template'** Check box. This will enable the **'Templates'** Tab.
5. From the templates tab, tick the **'Use Different Template By Run'**. This will enable the **'1<sup>st</sup> Run'**, **'2<sup>nd</sup> Run'** and **'3<sup>rd</sup> Run & Above'** buttons where you can select templates for each one.

The screenshot shows the 'Reminder Type' dialog box with the 'Templates' tab selected. The 'Use Different Template By Run' checkbox is checked. Below it are three buttons: '1st Run', '2nd Run', and '3rd Run & Above'. The '1st Run' button is highlighted. Underneath, there are three rows for 'Document', 'Email', and 'Txt / Sms', each with a dropdown menu and 'Edit'/'New' buttons. At the bottom are 'Accept', 'Cancel', and 'Help' buttons.



**NOTE:** You can view dates that runs were sent to clients by clicking on the reminder on the animal record.

## Printing and Sending Mailmerged Documents

1. Click on the **'Reports'** button then double-click the **'Reminders / Recalls'** button.
2. Double click on the reminder or recall you wish to send and the filter page will open.
3. Choose the filters that you want to limit the search by and click the **'F12: Next'** button to start the search.
4. A list will be created with all the results matching the specified filters.
5. You can now finalise which clients are to receive the mailers and what form of communication is to be used. Use the **'Inc, Post, Eml and SMS'** boxes to do this.
6. **Inc (Include):** When unchecked the client will not be sent any type of mailer even if the post, email or SMS boxes are ticked. When unchecked the client's details will change to italics.
  - a. **Post:** If ticked a letter will be printed out for the client.
  - b. **Eml:** If ticked the client will be sent an email.
  - c. **SMS:** If ticked the client will be sent an SMS text message.
7. Once you have chosen who to send mailers to and how to send them, click on the **'Process'** button.
8. A copy of the unmerged letter will now be shown. If required you can edit the document. If there are any SMS and email messages pending, these will be sent first, they **will not** be previewed.
9. Click on the **'Merge Preview'** button and the client's details will be merged into the document.
10. Click on the **'Print'** button and the letter will be printed.

