



# VisionVPM 2019.3

Release Notes

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# Changes to VisionVPM 2019.3

This section lists all changes to VisionVPM 2019.3 with details of these changes in the following section.

## Appointment Book (.net)

### Appointment reminder txts for Contacts

A txt reminder for an appointment can be sent to both the Client and the Client Contact in the appointment **Alt Address** if they are marked in Contact Details to **Can Txt Pre/Post Appt Message**.

### Appointment Book stays open when changing User

The Appointment Book remains open when changing user and the new logged-in user's access will be active.

### Primary Vet

All vets are available to be selected as the **Primary Vet** for an appointment. VisionVPM will default to the vet associated with the resource.

### Send one-off email

Send an email from an appointment by right-clicking the appointment and clicking **Send Email to** the client or contact on the appointment.

## Boarding Schedule (.net)

### Admit animal from Boarding

Admit an animal to hospital from the Boarding Schedule by right-clicking the client's booking and select **Admit to Hospital** followed by the required animal.

### Boarding Status Colour

The Boarding Status colour is displayed on the bottom of the boarding as well as on the left-hand side.

### Client and Animal name search

Search for a client and animal by entering the start of the client's name, a comma, and at least one letter of the animal's name.

### Default Boarding Status

The Boarding Status is set to Tentative for all new bookings.

### Number of days for booking

The Number of days for a booking can be added as an alternative to adding an End date.

### Product/Services area

Products and services can be linked to an animal on a booking and when selected, will be displayed on the generated invoice. Where an animal is not linked to a product, the animal field will be blank on the invoice line.

### User on booking

The **User** can be specified on a booking and will be required if set as compulsory in System Defaults.

## Clients

### Balance Adjustment

The payment amount entered is retained when adding a Balance Adjustment to the payment.

### Clinical Template reports

VPMReports are available to be added to clinical templates and are displayed at the top of the reports list.

## Consolidate reminders

Send one reminder for multiple animals of the same client:

- Sent via auto-merged reminders - select **Consolidate the results for clients with multiple reminders** in **Setup** button on the Reminder Schedule window.
- Sent via Automated Reminder Plans - select **Consolidate reminders for the same client and day** in your Automated Reminder Plan window.

## Contact opt in/out

Client Contacts can be sent invoice/statements and statements as part of one-off statements and / or End of Month Invoice/Statement and Statement runs. *See the Detailed Changes section below for further information.*

## Department field removed from Clinical Record prompt

The **Dept** field has been removed from the prompt on the Clinical Record window when there is no Department in either Computer Defaults or Vet in Session. When creating an invoice from the clinical record and you are using departments, you will be prompted to add the department to the invoice.

## Marketing Schedule

- Animals with Boarding Scheduler bookings can be searched for in a date range.
- Can search on client Last Verified dates, in a date range.
- Client and Animal Groups can be created from the Bulk Update window.
- Multiple Client and Animal Groups can be included in or excluded from a search.
- Multiple buttons have been added or removed from the Results window.
- The **Bulk Update** button is displayed when the logged in User has access to this function. *See the Detailed Changes section below for further information.*

## Reminder Schedule

- Columns are sortable.
- Mobile and Email columns displayed on the Reminder List results window.
- The **Add Marker** and **Clear Marker** buttons have been removed from the Results window and this functionality is available from the **Markers** button.
- The **Print Letter** button has been removed. This functionality is available from the **Print** drop-down.
- When lines are selected, the Print option includes a prompt to only print selected lines.

## Vetscan FUSE Lab Results (AU)

For Australian customers using Vetscan FUSE, VisionVPM automatically attaches FUSE lab results when the corresponding files are in the folder set in **Clients > Lab and Diagnostic Results > Lab Setup > Vetscan FUSE**. Once the results are imported into VisionVPM, the lab result file will be moved to the *[path to lab results folder]/Archive/Fuse* folder and wording "VetScanFuse\_" added to file name.

Note, Vetscan FUSE results can already be attached in VisionVPM for New Zealand customers.

## VPMSpreadsheet and VPMDocs files

Open a file of type VPMSpreadsheet or VPMDocs through **Help > Open VPMSpreadsheet/VPMDocs file** and browse from the Docs folder in your default path to VisionVPM. **Open selected document with VPMDocs** is also available on the Documents button in Client Details, Animal Details, History and Clinical Records when using VPMDocs.

## Wellness Plans

- A Wellness Plan can be cloned from an existing plan. *See the Detailed Changes section below for further information.*
- Discounts are automatically applied when a stock item is added to an invoice and the stock item is the animal's wellness plan. *See the Detailed Changes section below for further information.*
- Discounts can be set to a dollar (\$) amount or a percentage (%) on Wellness Plan items.
- Wellness Plan stock item lines can be edited on a client invoice, for example, if you need to change the quantity of a product in a formulation attached to the wellness plan.

- When you have added an invoice containing a wellness plan stock item and then added the Wellness Plan to the animal, you can edit the invoice line and VisionVPM will generate the wellness plan discount.
- Printing a Wellness Plan for an animal will prompt if the animal has no active or pending Wellness Plan. Wellness Plan reports in the VPMReports Selection window are set as Active on update.

## Management

### EFTPOS Integration option in Computer Defaults

EFTPOS integration per workstation is controlled by the **Use EFTPOS Integration** option in Computer Defaults. When using EFTPOS integration, after upgrading, the Computer Defaults option will be enabled by default. Where a workstation is not using EFTPOS integration, this option can be disabled.

### End of Year Rollover

A prompt to clarify End of Year checks have been completed is seen on the End of Year Rollover option.

### Hide Pack Cost and Markup

**Pack Cost** and **Markup** amounts can be hidden for a user/role by clearing the **Can see stock cost and markup** option in User Access. Staff logged in with this access will not see Pack Cost and Markup on Stock Details, Stock Activity, Stock Selection List windows and associated reports and spreadsheets and they will see a **Y** in the **Pack Cost** and **Markup** columns on the Stock List window.

### Homepage

- The count of Diary tasks created and marked as Finished for today are displayed in **Finished Today**.
- **Unread** diary tasks include all unread diary tasks, not just for the current date.
- Upcoming and incomplete appointments for today are displayed in the Homepage when you enter the number you wish to see in **Setup**.
  - Appointments that are invoiced, paid or marked as **Finished** will not be displayed.
- VHM Events scheduled for the current day are displayed in the Homepage when you enter the number you wish to see in **Setup**. Select to display Events for all VHM users or a single VHM user.

### Lab Results List

Client, Animal and Clinical Record buttons are available on the Lab Results List window to quickly go to the associated client, animal or clinical record for the selected animal.

### Merge to Word

An optional .net add-on application to merge Microsoft Word documents replaces the previous DDE (Dynamic Data Exchange) commands which are not compatible with recent versions of Microsoft Word. *See the Detailed Changes section below for further information.*

### Payment Express EFTPOS User ID length increase

The **User** field has been increased to 50 characters for the EFTPOS wireless solution for Windcave in the Payment Express Settings window of Computer Defaults.

### Unlinked Scanned Docs on VPMNavigator

Notification is displayed in the VPMNavigator if you are using the Automatic Scanned Documents feature and there are documents that haven't been successfully linked to an Animal, Client, Supplier or Clinical Record. Click the notification to open the Unlinkable Documents folder to validate the files.

### Vet/User in Session

The **Current Vet** and **Current User** in the Vet in Session window are cleared if logging on as a user that is not set to **update Vet/User in Session when logging on**.

## VPMMail .net 4.5 Framework

The .net 4.5 framework is required for VPMMail so if it is not already installed on the workstation then you will be prompted when starting VisionVPM to open the website and download the .net framework.

## User password length

A password for a User / Vet can be up to 30 characters.

# Stock

## Barcode Report Sort options

The **Print Stock Barcodes** report can print in List, Code or Description order. The items in the Print Barcodes window can be sorted by selecting a column header.

## Batch and Expiry

- Click **Insert** on the Batch and Expiry window to add Batch and Expiry details to a stock item in the Batch and Expiry stock analysis group. Click **Add another record on save** to add more.
- Select an **Analysis Group** option to filter the Batch and Expiry List. The Analysis Group name is displayed when printing a Batch & Expiry report from the Stock Batch and Expiry List window.
- Print the list of batch and expiry details by selecting **Print Batch and Expiry List** from the **Print** drop-down list on the Batch and Expiry window.

## Stock Transfer barcodes

A stock item can be searched by barcode (up to 40 characters) in a stock transfer by using the **Description** field when the **Find stock items by barcode** option is enabled in **Maintenance > System Defaults**.

## Provet Connect pricing / availability

**Provet Pricing / Availability** is available from the Stock Reorder and Goods on Order windows when using Provet Connect. Contact your Provet Business Account Manager if you are using Provet e-Order.

## Department Stock Quantity report

The stock description will wrap on the Department Stock Quantity report if it is wider than the column width.

## Stock Location removed from Stocktake report

The **Location** column has been removed from the Stocktake report and spreadsheet as stock items can potentially have more than one location.

## Stock Traffic Light system

A traffic light system (green, orange, red) is available to indicate usage recommendation of stock items. This supports the New Zealand Veterinary Association guidelines on classifying antimicrobial agents. *See the Detailed Changes section below for further information.*

## User Code on Goods Receipts

A **User Code** can be selected on a Goods Receipt. This defaults to the **Current User** in Vet in Session.

# Detailed Changes in Client module

This section details some of the client related changes in VisionVPM 2019.3 that have been listed in the previous section.

## Automatic invoicing for Wellness Plans

Items added to a client invoice are checked if they are in a wellness plan, either as a specific item or in an analysis group on the wellness plan. If the item is in a plan for the animal, then the associated discount is automatically added to the invoice.

Items are automatically checked for wellness plan discounts in the following areas:

- Displayed formulations
  - The header of hidden formulations only is checked, as the header is displayed on the invoice.
- An estimate turned into an invoice.
- Clinical Record (Drugs tab or not) to invoice
- Repeat prescriptions to invoice
- Invoices created from Smart flow.

## Contact opt in/out option for Invoice/Statements

All Contacts can be marked to receive a printed or emailed invoice/statement or statement, either from the Client Details window or the Client End of Month Procedures, by clicking the **Include in statement run** checkbox on the Client Contact window. This replaces the **Never send account** check box from the **Settings** tab of the Client Details window. Adding a new contact to a client will have no Client Contact Settings ticked by default.

On update:

1. Primary Contacts who were previously marked to **Never send account** will not be marked to **Include in statement run**.
2. All other Primary Contacts will be marked to **Include in statement run**.
3. All other Contacts will not be marked to **Include in statement run**.



To allow an email to be sent to the Contact, click the **Can Email Statements** check box as well as the **Include in statement run** check box.

The screenshot shows a software window titled "Client Contact - 351". On the left, there are input fields for contact information: Contact Title (Miss), Firstname (Janet), Lastname (Bleakley), Company, Address (23 Somewhere Road), Suburb (Somewhere), City & Postcode (TAURANGA 3001), Site Information, GPS Latitude (1) and Longitude (122), Phone, Mobile Phone (021111111), Email Address (jane.bleakley@gamil.com), and Charging Distance (50 Kms). On the right, there are sections for "Linked Client Details" (Amy Abernethy and John Smith, 102 Somewhere Else Road, Papamoa Beach, Papamoa 3118), "Client Contact Settings" (Contact Role dropdown), and "Can Email" options. In the "Can Email" section, the "Statements" checkbox is checked and highlighted with a red box. In the "Client Contact Settings" section, the "Include in statement run" checkbox is checked and highlighted with a red box. Other options like "Include in marketing results" and "Include in reminder results" are unchecked.

The Marketing option **Never send account** has been changed to look at the contact statement option.

1. Marketing results > Custom > **Send Statement** is available.
2. Marketing Results > Bulk Update > **Send Statement** is available which replaces the **Never send account** option.

### Printing and emailing one-off statements for contacts

A **Contact** drop-down list has been added to the window when clicking **Statement** from the Client Details window allowing you to send statements to other Contacts. By default, the Primary Contact will be displayed. Inactive Contacts will be excluded from both printing and emailing.

The screenshot shows a dialog box titled "Set Current Report Date". It has a header "Enter the Invoice/Statement Period Dates". Below this are input fields for "Date From" (1 AUG 19) and "Date to" (31 AUG 19), and a "Message" dropdown menu (BANK). There are "Ok" and "Cancel" buttons. Below these are four unchecked checkboxes: "Use other activity grouped to this client", "Use Statement Format instead of Invoice/Statement.", "Exclude incomplete invoices", and "Email the statement". At the bottom, there is a "Contact" dropdown menu highlighted with a red box, showing the text "Abernethy And Smith, Mrs And h".

To select a different Contact, click the drop-down arrow and either select the required Contact or select **All Statement Contacts** to send the statement to all Contacts marked to **Include in statement run**.

When selecting to **Email the statement**, only Contacts marked with **Include in statement run** and **Can Email Statement** will be included.



A printed or emailed statement sent to a Contact other than Primary Contact will add the words **Copy To:** followed by the address of the Contact.

**Amy Abernethy and John Smith**  
**Copy to: Richard Main**  
 123 Ocean Rd  
 PAPAMOA 3149

Note:

1. Copy To: details are displayed in the Remittance area of VPMReport Invoice/Statements.
2. This feature is unavailable in adhoc's.

**Amy Abernethy and John Smith**  
**Copy to: Main Company**  
 A/c ABERNM  
 Date To: 30 Sep 19

A **Copy to:** line has been added to the Clinic Based Copy report from Clients End of Month Procedures.

**Client: ABERNM Mrs And Mr Abernethy And Smith Current: 91.76**  
**Copy for: Mr Richard Main**  
 10 AUG 19 78557 BC Peggy Sue monthly w... Kitten Wellness Plan  
 10 AUG 19 78570 BC Peggy Sue monthly w... Kitten Wellness Plan

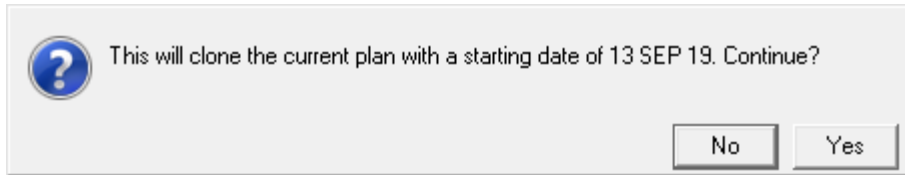
A **Copy To Contact** column has been added to the Client Order List report from Clients End of Month Procedures.

| Code   | Client Name                                 | Copy To Contact | Number | Markers | Address                               |
|--------|---|-----------------|--------|---------|---------------------------------------|
| ABERNM | Mrs And Mr Amy And John Abernethy And Smith |                 | 12345  | !       | 102 Somewhere Else Road Papamoa Beach |
| ABERNM | Mrs And Mr Amy And John Abernethy And Smith | Mr Richard Main | 12345  | !       | 123 Ocean Rd                          |

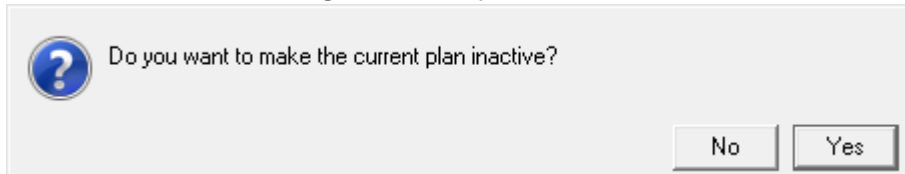
## Cloning Wellness Plans

A Wellness Plan can be cloned to roll the plan over to the following year.

1. Select **Wellness Plan** from Animal Details and then **View all the animal's wellness plans**.
2. From the Wellness Plan List window, select the required wellness plan.
3. Click **Clone** and then click **Yes** to the prompt to clone the current plan with the start date.



- Click **Yes** to the prompt to inactivate the current plan when the current plan is for the previous year. Otherwise, click **No** to continue using the current plan.



- The new plan will default to **Pending**. Mark the plan as **Active** if required.
- Click **Save**.

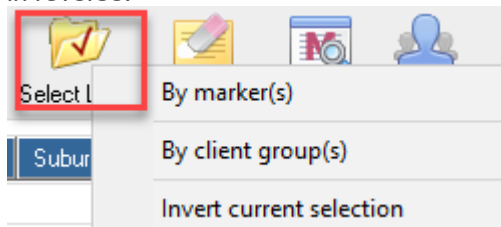
## Marketing Schedule Results window

The following buttons have been moved or removed:

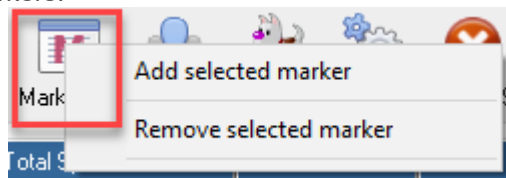
- **Add Marker** - moved to **Markers** button
- **Clear Marker** - moved to **Markers** button
- **Print Letter** - moved to **Print** drop down button.
- **Letters** – removed as no longer required.

The following buttons have been added or had their functionality changed:

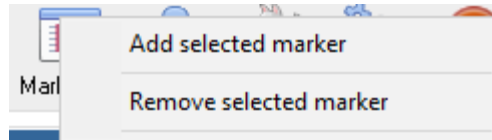
- **Select Lines**: You can select lines by client marker, client group and also invert the current selection to display the records sorted in reverse.



- **Clear Lines**: Clears the selected lines only. Previously, when no lines were selected, VisionVPM prompted to select a client marker. This functionality is now performed using the **Select Lines** button.
- **Print**: The **Selected Letter** option has been moved to the **Print** drop-down button.
- **Markers**: Markers are added and removed from the **Markers** button. Select the required option and then select the required markers.



- **Clear Lines**: Clears the selected lines only. Previously, when no lines were selected, VisionVPM prompted to select a client marker. This functionality is now performed using the **Select Lines** button.
- **Print**: The **Selected Letter** option has been moved to the **Print** drop-down button.
- **Markers**: Markers are added and removed from the **Markers** button. Select the required option and then select the required markers.



## Detailed Changes in Stock module

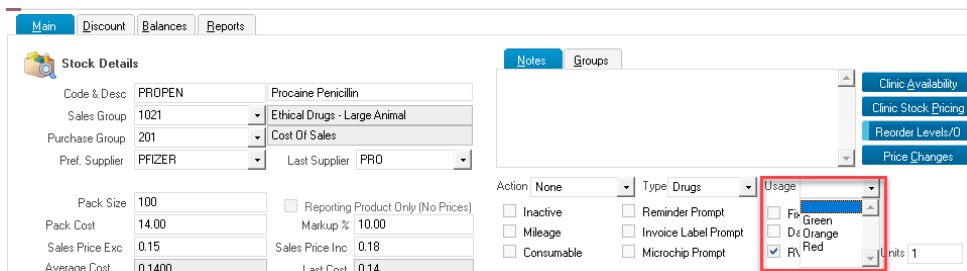
This section details some of the stock related changes in VisionVPM 2019.3 that have been listed in the previous section.

### Stock Usage Classification

Stock items can be marked with a three-tier traffic light system to identify their antimicrobial classification according to NZVA guidelines. Sales and purchases of Stock Usage items can then be reported.

#### To add stock usage to a stock item

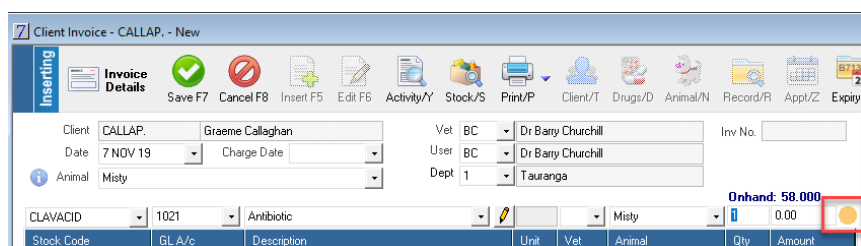
1. Go to **Stock > Stock Details** and locate the required stock item.
2. Click the **Usage** arrow and select the required option:
  - a. Green – *Antimicrobials for first line therapy under therapeutic conditions.*
  - b. Orange – *Antimicrobials restricted to specific indications or used as second line therapy under therapeutic conditions.*
  - c. Red – *Antimicrobials considered important in treating refractory conditions in human and veterinary medicine, on a case by case basis with enough evidence to indicate need.*



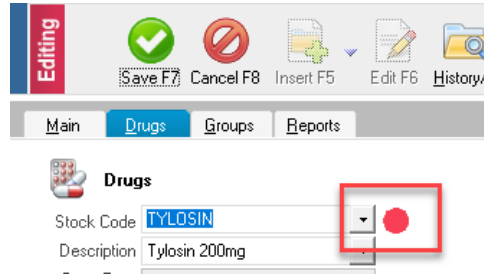
The indicator colour is displayed on the Stock List window for stock items with a stock usage specified.

| Code      | Description               | Generic Name | Sales Group | Unit   | Supplier  | Formulation | RVM                                 | Consumable               | Sale Price (inc) |
|-----------|---------------------------|--------------|-------------|--------|-----------|-------------|-------------------------------------|--------------------------|------------------|
| CLAVACID  | Clavulanic Acid 125mg     | Antibiotic   | 1021        |        | PRO       |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 6.90             |
| CLAV250   | Clavulox 250mg Tablets    | Antibiotic   | 4.1.201     | tabs   | SVS       |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 2.02             |
| CLAV500MG | Clavulox 500 Mg           | Antibiotic   | 4.1.201     |        | SVS       |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0.10             |
| PROPEN    | Procaine Penicillin       | antibiotic   | 1021        | ml     | PFIZER    |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0.18             |
| TYLOSIN   | Tylosin 200mg             | antibiotic   | 4.1.201     | bottle | Chemstock |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0.87             |
| CLAVULOX  | Clavulox 250mg Purchasing | antibiotics  | 101-1       | mg     | PRO       |             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0.38             |

The indicator colour is displayed on the client invoice when adding an item with a stock usage;



and the **Drugs** tab of the clinical record.



## Stock Selection Reports

To view stock items with a specified usage, go to **Stock > Stock Selection List** and select the **Usage Products** option.

- Products without a barcode (main or stock supplier window)
- On main window  On main or stock supplier window
- Stock without activity since
- Usage Products

To update the stock usage field in bulk, select your products through the Stock Selection List window then click **Bulk Update** and specify the appropriate **Stock Usage** and click **Update Usage**.

Stock Letters     
 Stock Locations     
 Stock Actions    
 Stock Fees    Update associated formulations and estimates  
 Stock Type    
**Stock Usage**

The Stock Usage indicator can be seen on all reports from the Stock Selection List results window except the Custom Report.

**Tauranga Animal Health**  
 Report: Stock Price List  
 Date To: 16 OCT 19

| Code   | Description           | Unit of Sale | Normal Price (inc GST) | Stock Fee | Normal Total (inc GST) |
|--|-----------------------|--------------|------------------------|-----------|------------------------|
| <b>Sales Group 1021 Ethical Drugs - Large Animal</b> |                       |              |                        |           |                        |
| CLAVACID   | Clavulanic Acid 125mg | ml           | 6.90                   |           | 6.90                   |
| PROPEN   | Procaine Penicillin   |              | 0.18                   |           | 0.18                   |
| <b>Sales Group 4.1.201 Injectable Medications</b>    |                       |              |                        |           |                        |
| TYLOSIN  | Tylosin 200mg         | bottle       | 0.87                   |           | 0.87                   |

## Client Sales Reporting

The Stock Usage indicator can be seen on the Client Sales Selection, Monthly Sales and Monthly Statistics reports under **Reports > Clients**.

| Tauranga Animal Health                      |                         | Date Printed: 16 OCT 19 - Page 1 |                   |                |              |
|---|-------------------------|----------------------------------|-------------------|----------------|--------------|
| Report: Sales Selection                     |                         |                                  |                   |                |              |
| Current Period 1 OCT 19 to 31 OCT 19        |                         |                                  |                   |                |              |
| Previous Period 1 OCT 18 to 31 OCT 18       |                         |                                  |                   |                |              |
| Stock Usage                                 | Current Sales (exc GST) | Previous Sales (exc GST)         | Yearly Difference | Profit (\$)    | Profit (%)   |
| <b>Dr Barry Churchill</b>                   |                         |                                  |                   |                |              |
| *No Stock Item                              | -632.94                 | 0.00                             | -632.94           | -632.94        | 100.00       |
| *No Stock Usage                             | 3505.91                 | 47.31                            | 3458.60           | 2184.10        | 62.30        |
| ● Green                                     | 0.17                    | 0.00                             | 0.17              | 0.03           | 17.65        |
| <b>Total For Dr Barry Churchill</b>         | <b>2873.14</b>          | <b>47.31</b>                     | <b>2825.83</b>    | <b>1551.19</b> | <b>53.99</b> |
| <b>Dr Lorraine Abernethy - 20950912</b>     |                         |                                  |                   |                |              |
| *No Stock Item                              | 0.00                    | 0.00                             | 0.00              | 0.00           | 0.00         |
| *No Stock Usage                             | 99.91                   | 93559.28                         | -93459.37         | 30.84          | 30.87        |
| ● Green                                     | 0.00                    | 0.15                             | -0.15             | 0.00           | 0.00         |
| <b>Total For Dr Lorraine Abernethy -...</b> | <b>99.91</b>            | <b>93559.43</b>                  | <b>-93459.52</b>  | <b>30.84</b>   | <b>30.87</b> |
| <b>Dr Penny Turner</b>                      |                         |                                  |                   |                |              |
| *No Stock Usage                             | -0.09                   | 0.00                             | -0.09             | -0.09          | 100.00       |
| ● Red                                       | 0.78                    | 0.00                             | 0.78              | 0.40           | 51.28        |
| <b>Total For Dr Penny Turner</b>            | <b>0.69</b>             | <b>0.00</b>                      | <b>0.69</b>       | <b>0.31</b>    | <b>44.93</b> |
| <b>Jay Gennings</b>                         |                         |                                  |                   |                |              |
| ● Orange                                    | 6.00                    | 0.00                             | 6.00              | 3.00           | 50.00        |
| <b>Total For Jay Gennings</b>               | <b>6.00</b>             | <b>0.00</b>                      | <b>6.00</b>       | <b>3.00</b>    | <b>50.00</b> |
| <b>Totals</b>                               | <b>2979.74</b>          | <b>93606.74</b>                  | <b>-90627.00</b>  | <b>1585.34</b> | <b>53.20</b> |

## Stock and Department Stock Levels Reports

The Stock Usage indicator can be seen on the Stock Levels & Department Stock Levels reports under **Reports > Stock**.

|          |                                   |
|----------|-----------------------------------|
| CHRO2    | Chromic Catgut 2usp/6metric Cvet  |
| CHRO3/0  | Chromic Catgut 3/0usp/3.0metric   |
| CLAV1BOT | Clav 1 Bottle Containing 250 Tabs |
| CLAVACID | ● Clavulanic Acid 125mg           |
| CLAV100  | Clavulox 100mg [100]              |

When sent to spreadsheet a **Stock Usage** column is displayed.

| Stock Levels to 30 NOV 19 |                                   |             |              |
|---------------------------|-----------------------------------|-------------|--------------|
| Code                      | Description                       | Stock Usage | Unit of sale |
| CHRO2                     | Chromic Catgut 2usp/6metric Cvet  |             | metre        |
| CHRO3/0                   | Chromic Catgut 3/0usp/3.0metric   |             | metre        |
| CLAV1BOT                  | Clav 1 Bottle Containing 250 Tabs |             | tab          |
| CLAVACID                  | Clavulanic Acid 125mg             | Orange      |              |
| CLAV100                   | Clavulox 100mg [100]              |             | tab          |
| CLAVULOX                  | Clavulox 250mg Purchasing         |             | mg           |
| CLAV250MG                 | Clavulox 250mg Tablet (Sf)        |             | Ea           |

## VPMAalytics

The **Stock Usage** field is available in VPMAalytics Client and Supplier reports.

## Monthly Sales by Vet report

|                                     |  | October        | Grand Total    |
|-------------------------------------|--|----------------|----------------|
| Expand All <b>Monthly Vet Sales</b> |  |                |                |
| -- *No Stock Item                   |  |                |                |
| Dr Barry Churchill                  |  | -632.94        | -632.94        |
| Dr Lorraine Abernethy - 20958912    |  | 0.00           | 0.00           |
| <b>*No Stock Item Total</b>         |  | <b>-632.94</b> | <b>-632.94</b> |
| -- *No Usage Set                    |  |                |                |
| Dr Barry Churchill                  |  | 3505.91        | 3505.91        |
| Dr Lorraine Abernethy - 20958912    |  | 99.91          | 99.91          |
| Dr Penny Turner                     |  | -0.09          | -0.09          |
| <b>*No Usage Set Total</b>          |  | <b>3605.73</b> | <b>3605.73</b> |
| Green                               |  |                |                |
| Dr Barry Churchill                  |  | 0.17           | 0.17           |
| <b>Green Total</b>                  |  | <b>0.17</b>    | <b>0.17</b>    |
| Orange                              |  |                |                |
| Jay Gennings                        |  | 6.00           | 6.00           |
| <b>Orange Total</b>                 |  | <b>6.00</b>    | <b>6.00</b>    |
| Red                                 |  |                |                |
| Dr Penny Turner                     |  | 0.78           | 0.78           |
| <b>Red Total</b>                    |  | <b>0.78</b>    | <b>0.78</b>    |
| <b>Grand Total</b>                  |  | <b>2979.74</b> | <b>2979.74</b> |

## Supplier Report

|                             |  | September      | October        | Grand Total     |
|-----------------------------|--|----------------|----------------|-----------------|
| Expand All <b>Supplier</b>  |  |                |                |                 |
| -- *No Stock Item           |  |                |                |                 |
| *No Stock                   |  | 6000.00        | 600.00         | 6600.00         |
| <b>*No Stock Item Total</b> |  | <b>6000.00</b> | <b>600.00</b>  | <b>6600.00</b>  |
| -- *No Usage Set            |  |                |                |                 |
| Clavulox 100mg [100]        |  | 100.00         |                | 100.00          |
| Ketamil 50ml                |  |                | 500.00         | 500.00          |
| Oxyfoam Pessaries           |  |                | 812.50         | 812.50          |
| Rimadyl Tablets [100]       |  | 50.00          | 5050.00        | 5100.00         |
| <b>*No Usage Set Total</b>  |  | <b>150.00</b>  | <b>6362.50</b> | <b>6512.50</b>  |
| Green                       |  |                |                |                 |
| Procaine Penicillin         |  |                | 42.00          | 42.00           |
| <b>Green Total</b>          |  | <b>42.00</b>   |                | <b>42.00</b>    |
| Orange                      |  |                |                |                 |
| Clavulanic Acid 125mg       |  |                | 180.00         | 180.00          |
| <b>Orange Total</b>         |  | <b>180.00</b>  |                | <b>180.00</b>   |
| Red                         |  |                |                |                 |
| Tylosin 200mg               |  |                | 37.65          | 37.65           |
| <b>Red Total</b>            |  | <b>37.65</b>   |                | <b>37.65</b>    |
| <b>Grand Total</b>          |  | <b>6150.00</b> | <b>7222.15</b> | <b>13372.15</b> |

## RVM Reports

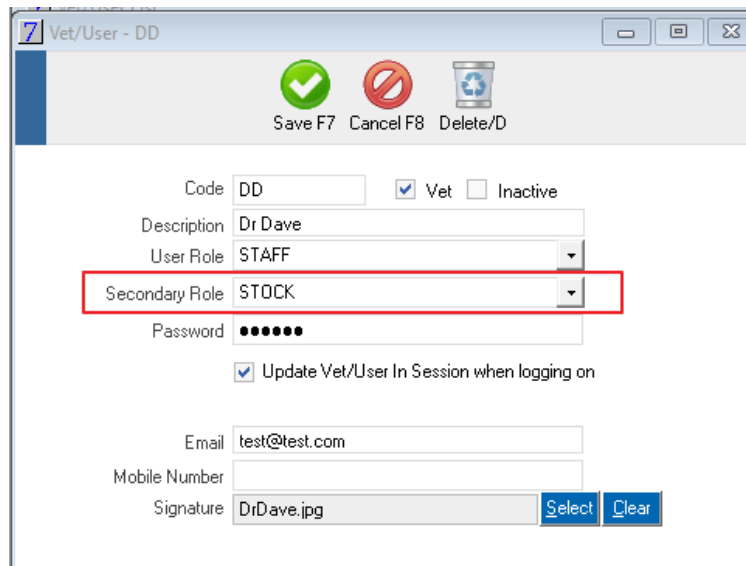
The Stock Usage indicator is displayed on the adhoc reports and VPMReports from **Client Details > RVM**.

# Detailed Changes in other areas

This section details some of the other changes in VisionVPM 2019.3 that have been listed in the previous section.

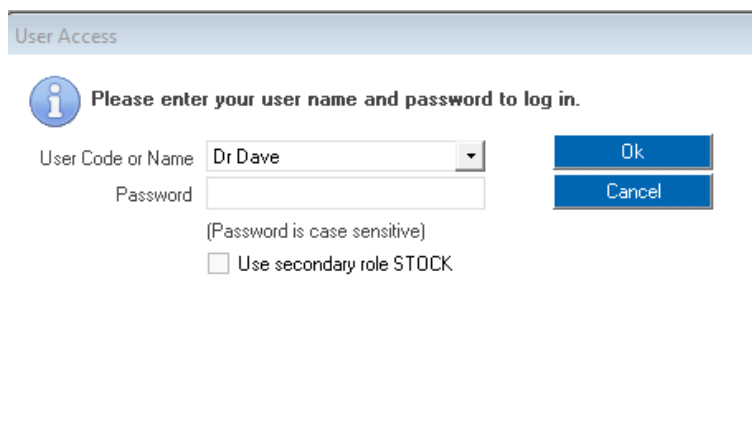
## Log in with multiple roles

A user can be set to have a secondary role by going to **Maintenance > Lookup Lists > General Lists > Vet/User Names** and editing the user details window to select the **Secondary Role**. Secondary roles show on the Vet/Users window. Specifying a user role or secondary role is only available under Admin log in.



The screenshot shows a window titled "Vet/User - DD". At the top, there are three icons: a green checkmark (Save F7), a red prohibition sign (Cancel F8), and a trash can (Delete/D). Below these are several fields: "Code" (DD), "Description" (Dr Dave), "User Role" (STAFF), "Secondary Role" (STOCK, highlighted with a red box), "Password" (masked with dots), "Email" (test@test.com), "Mobile Number" (empty), and "Signature" (DrDave.jpg). There are also checkboxes for "Vet" (checked), "Inactive", and "Update Vet/User In Session when logging on" (checked). Buttons for "Select" and "Clear" are next to the signature field.

A user with a secondary role can tick **Use secondary role** on the User Access window when logging in. The secondary role is displayed after selecting the user and the logged in role can be seen on the Navigator. Note: The **Show Database Options** checkbox is only available on starting VisionVPM.

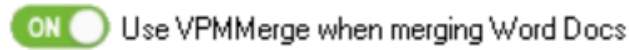


The screenshot shows a window titled "User Access". It contains an information icon and the text "Please enter your user name and password to log in.". Below this are fields for "User Code or Name" (Dr Dave) and "Password". There are "Ok" and "Cancel" buttons. A checkbox labeled "Use secondary role STOCK" is checked. A note "(Password is case sensitive)" is also present.



## VPMMerge to Word

The option to **Use VPMMerge when merging Word Docs** is available in System Defaults and will be disabled by default on update.

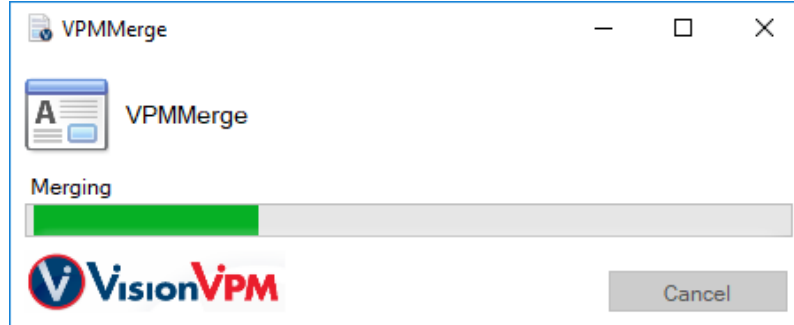


When this option is enabled, VPMMerge will be used in the following areas rather than the Microsoft DDE tool which does not work with certain versions of MS Word:

1. Client Details > New Document
2. Animal Details > New Document
3. Clinical Record > New Doc
4. RVM List > New Doc
5. Reminder Results List > Merge > Merge to Microsoft Word
6. Marketing Results List > Merge > Merge to Microsoft Word
7. Invoice > Print Stock letter to Word.

### Notes:

- The Privacy Settings of Word may need to be checked when creating new Word templates if prompted by Word.
- VPMMerge allows multiple users to merge Word docs simultaneously without the previous data.doc sharing issues.
- Opening an existing document, merging an existing document or creating a new merge document from one of the areas above will show the VPMMerge progress window, similar to below.



# Issues Resolved in VisionVPM 2019.3

This section lists all issues that have been resolved in VisionVPM 2019.3

## Appointment Book (.net)

- Clicking the SMS List button on the SMS TXT Message History window opens the Appointment Txt Messages window.
- Blocked appointments with multiple resources can be moved successfully.
- Sending TXT settings on appointments are retained when creating appointments for the Vet in Session which is not part of a Resource Group.
- When sending a consent form to email, the client's email address is displayed by default.

## Client

- A new Equine animal has a default date of birth of 1 Aug and when Standard Breed is set, and selected date of birth is changed to 1 Sep.
- An invoice to an unverified web client includes GST on stock items
- Data transfer between clinics includes external lab results.
- Microsoft Outlook opens when selected from the Animal Details window.
- Printing consent forms on animal admit have VPMReports with a subtype of Consent available.
- Selecting options from the Print arrow on a client invoice prompt for the report destination.
- The Invoice Selection report prints correctly to pdf and printer.
- Stock items are displayed in the correct order after editing a DATE stock item.
- When printing a receipt from the Client Activity window, VisionVPM will only print the associated invoice details, if this option is enabled in Computer Defaults.
- VisionVPM correctly applies client discounts when switching between the two invoice discount options in System Defaults.
- Automated reminders sent when the same reminder code is included in multiple reminder plans.
- Searching by mobile number with spaces will find mobile numbers with spaces.
- Reminders attached to the Plan Charging Product in a Wellness Plan are generated when creating the Annual Plan Charge invoice.
- Multiple loyalty items from the same invoice are displayed on the Client Loyalty report.

## Stock

- Last Sale and Purchase Dates are automatically updated on VisionVPM update and an option is available in **Maintenance > Stock Maintenance > Update Last Sale and Purchase Dates**.
- Stock items in an RVM Analysis group can be added in bulk as per usual analysis groups.
- Unrequired Label Details can be removed using the **Delete** button in **Stock > Label Details**.
- **Stock Values** are displayed in the Stock Levels and Department Stock Levels report and spreadsheet when filtered by Sales Groups.

## Other

- A mobile laptop database maintains the correct Invoice numbers on client reminders.
- Inactive reminders are not displayed in the Check Reminder Creation window.
- **Maintenance** can be added to Quick Access menu however selecting this option from the Quick Access menu will prompt if the user does not have access to Maintenance.
- The selected Boarding Room Group is maintained when changing the order of Boarding Room Groups in **Boarding Scheduler > Setup > Groups**.
- The selected User Group is maintained when changing the order of User Groups in **Roster System > Setup > Groups**.
- An authorised user's password can be entered to continue an invalid RVM sale and override a client's credit limit.
- The new and unread Lab and Txt icons will be displayed statically, due to intermittent issues loading the animal window.