

VisionVPM Release Notes

v340.03 - 340.031



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Provet IT
PO Box 6026 BHBC
Baulkham Hills NSW 2153
Australia
1300 650 468

Website: www.provet.com.au <http://www.provet.com.au/>

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VisionVPM Release Notes v340.03

Changes to the Clients module

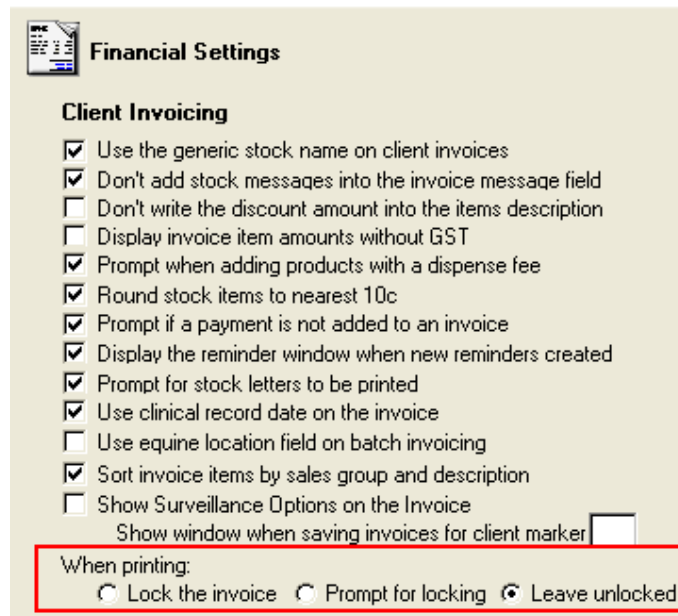
This section describes the changes that have been made to the **Clients** module.

Ability to edit printed client invoices

You now have the ability to edit printed client invoices. This is an optional feature which you will need to set if you wish to use this functionality.

Go to: **Main Menu > Maintenance** module > **Maintenance** menu > **System Defaults > Financial** tab.

A **When printing** option has been added to the Financial tab.



Financial Settings

Client Invoicing

- Use the generic stock name on client invoices
- Don't add stock messages into the invoice message field
- Don't write the discount amount into the items description
- Display invoice item amounts without GST
- Prompt when adding products with a dispense fee
- Round stock items to nearest 10c
- Prompt if a payment is not added to an invoice
- Display the reminder window when new reminders created
- Prompt for stock letters to be printed
- Use clinical record date on the invoice
- Use equine location field on batch invoicing
- Sort invoice items by sales group and description
- Show Surveillance Options on the Invoice
- Show window when saving invoices for client marker

When printing:

Lock the invoice Prompt for locking Leave unlocked

By default, when you apply this update, the **Lock the invoice** option will be selected.

To enable editing of printed invoices, select **Leave unlocked** and click **Save**.

If you want VisionVPM to display a prompt after you have printed an invoice asking you whether you wish to lock the invoice at not, click the **Prompt for locking** option.

When this option is selected, after you printed an invoice, the following message will be displayed:

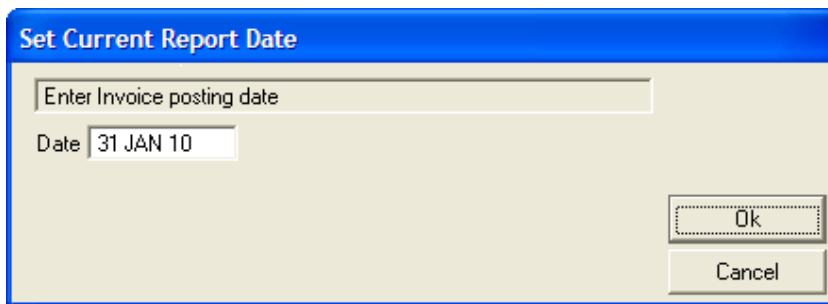


To lock the invoice so it is not available for editing, click **Yes**. Otherwise, to enable editing of the invoice, click **No**.

If you select to enable the editing of printed invoice function, you can lock all invoices by going to:

Main menu > **Clients** module > **Reports** menu > **Post Invoices**.

Enter the date to lock all invoices and click **Ok**.



In the above example, invoices inserted prior to 31 January 2010 will not be able to be edited.

Client sales used in Marketing Schedule

Go to: **Clients** menu > **Marketing Schedule** > **Insert**.

VisionVPM has been changed to calculate searches on client purchases when you enter a \$ amount in the **Spent Between** fields.

Marketing Search

Save F7 Cancel

Client Animal Clinical Invoice Options

Client Records

Clients street

Clients suburb

Postcode

Notes contain

Spent between and

Last payment from to

1st visit date from to

Has email Uses email Inactive N

Account Fee Add Interest Syndicate

Never send account Always send account

This allows you to find clients who have purchased stock items within the selected amounts.
 Previously, client payments were used in searches.

Go to: **Clients** menu > **Marketing Schedule** > **Insert** > **Options** tab.

VisionVPM has been changed to calculate searches on client purchases when you enter a date type in the Clients amount spent during date type field.

Marketing Search

Save F7 Cancel F8 Run/R

Client Animal Clinical Invoice Options Search Inv

Date type options:

Clients amount spent during date type:

Clients last payment during date type:

Clients first visit during date type:

Stock/sales group purchased date type:

Clinical records date type:

1. Last week
2. Last fortnight
3. Last month
4. Last 2 months
5. Last 3 months
6. Last 6 months
7. Last 9 months
8. Last year
9. Last 18 months
10. Last 2 years

Animal Age display

Go to: **Clients** menu > **Animal Details** > select animal > **Record**.

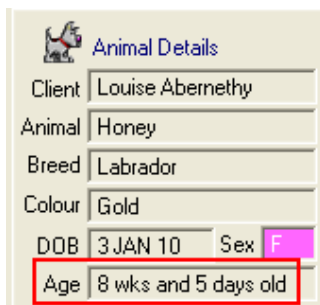
Previously the animal's age was displayed in the Clinical Record in weeks until one month old and then the age was displayed in months and weeks.



The screenshot shows the 'Animal Details' window with the following information:

Client	Louise Abernethy	
Animal	Honey	
Breed	Labrador	
Colour	Gold	
DOB	3 JAN 10	Sex F
Age	2 mths old	

In this version, the Clinical Record will display the animal's age in weeks until 12 weeks of age and then in months and weeks, which is compatible with the Animal Details window.



The screenshot shows the 'Animal Details' window with the following information:

Client	Louise Abernethy	
Animal	Honey	
Breed	Labrador	
Colour	Gold	
DOB	3 JAN 10	Sex F
Age	8 wks and 5 days old	

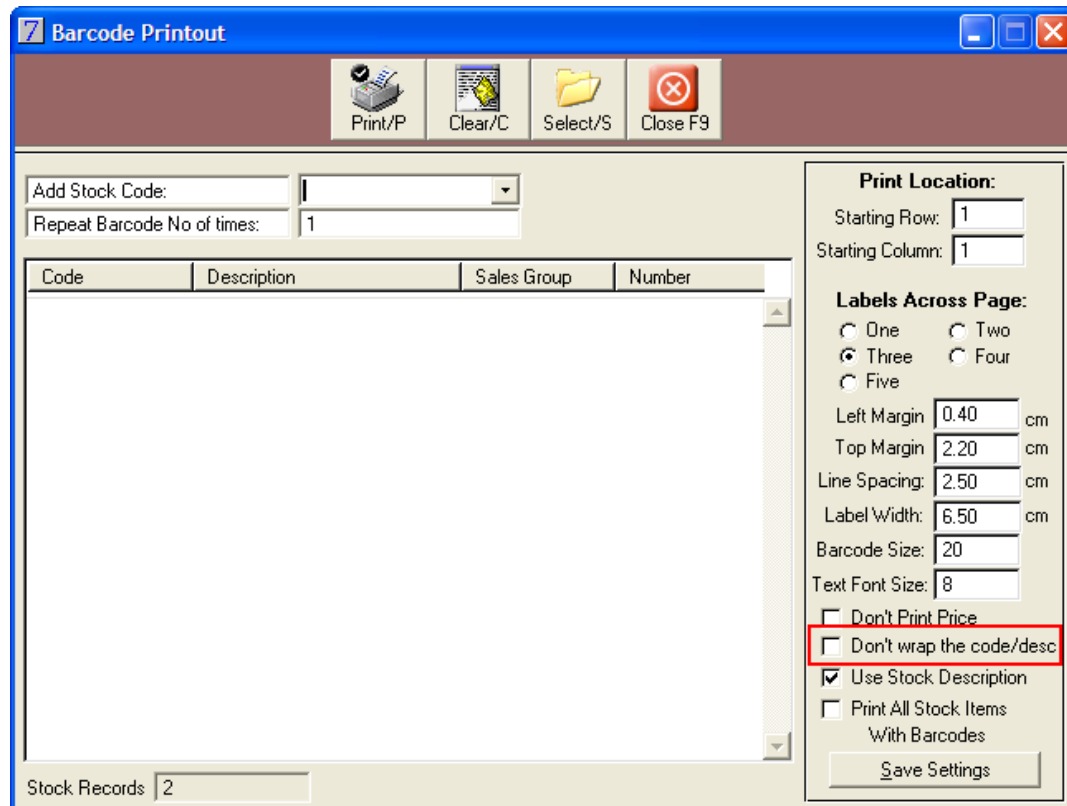
Changes to the Stock module

This section describes the changes that have been made to the **Stock** Module.

New check box on Barcode Printout window

Go to: **Stock** module > **Barcode Labels**.

A **Don't wrap the code/desc** check box has been added to the Barcode Printout window.



When selected, VisionVPM will truncate the stock description if it is longer than the label width.

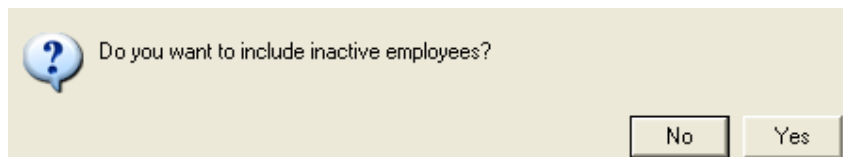
Changes to the Payroll module

This section describes the changes that have been made to the **Payroll** module. Please note the **Payroll** module is only available to New Zealand clients.

Excluding inactive employees from IRD and Account Details report

Go to: **Payroll** module > **Reports** menu > **IRD and Account Details**.

You now have the option of excluding inactive employees from this report. When selected, the following prompt will be displayed:



Click **No** to exclude inactive employees.

Previously, VisionVPM displayed all employees on the report.

New status column on IRD and Account Details report

Go to: **Payroll** module > **Reports** menu > **IRD and Account Details**.

A **Status** column has been added to the IRD and Account Details report. This column will display whether the employee is Active or Inactive.

Company: **Payroll Employee IRD Number & Bank Account List** Page 1

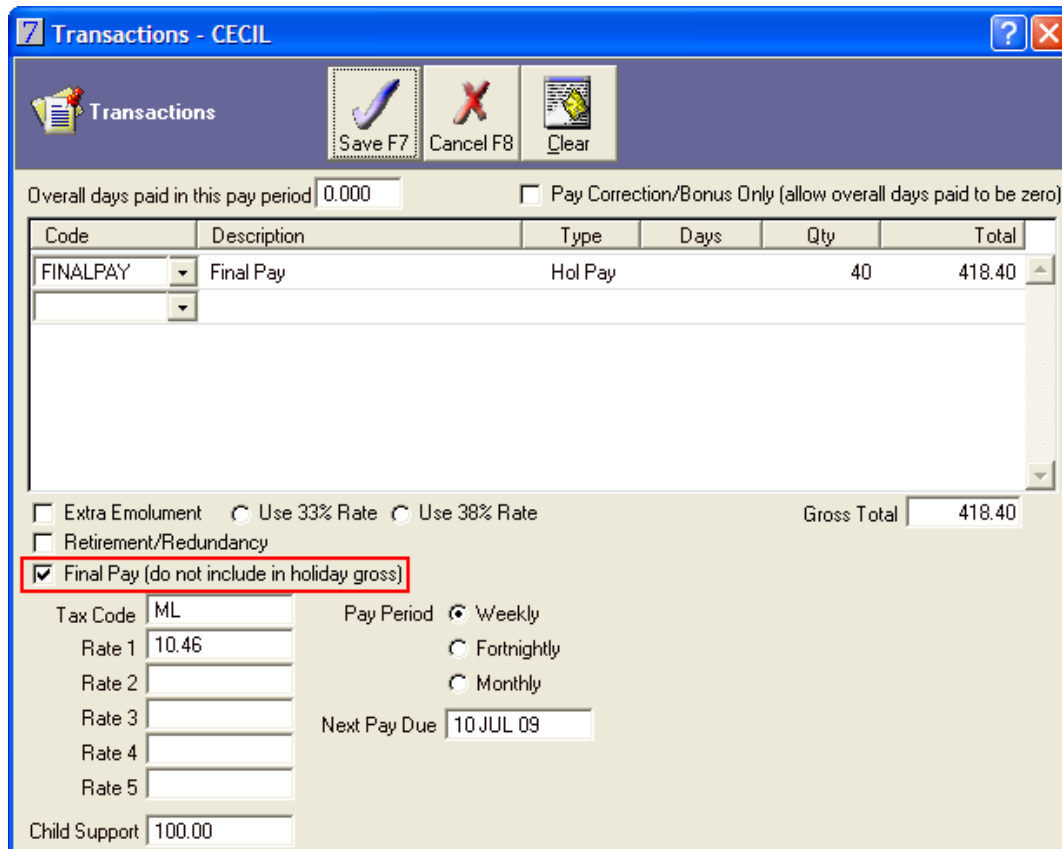
	Status	IRD Number	Bank Account Number
1e Janet	Inactive		
ith A Name	Active	555555555	000001 8787656 040
	Inactive		
lartin	Active		123456 3939659 030
	Inactive		
1	Active		
	Active		
arv	Active		

Final Pay Calculation

There is a new function in VisionVPM when adding a final pay for an employee who is leaving your clinic.

Go to: **Payroll** menu > **Pay Run** > enter day of final pay run > clear all lines except for the employee you are processing Final Pay > **Edit**.

A **Final Pay (do not include in holiday gross)** button has been added to the Transactions window.



The screenshot shows the 'Transactions - CECIL' window. At the top, there are icons for 'Save F7', 'Cancel F8', and 'Clear'. Below these, there is a field for 'Overall days paid in this pay period' set to '0.000' and a checkbox for 'Pay Correction/Bonus Only (allow overall days paid to be zero)'. The main table has columns for Code, Description, Type, Days, Qty, and Total. A single row is visible with Code 'FINALPAY', Description 'Final Pay', Type 'Hol Pay', Days '40', and Total '418.40'. Below the table, there are several checkboxes: 'Extra Emolument', 'Use 33% Rate', 'Use 38% Rate', 'Retirement/Redundancy', and 'Final Pay (do not include in holiday gross)'. The 'Final Pay' checkbox is checked and highlighted with a red box. To the right of these checkboxes is a 'Gross Total' field showing '418.40'. At the bottom, there are fields for 'Tax Code' (ML), 'Rate 1' (10.46), 'Rate 2', 'Rate 3', 'Rate 4', 'Rate 5', 'Child Support' (100.00), 'Pay Period' (Weekly selected), 'Fortnightly', 'Monthly', and 'Next Pay Due' (10 JUL 09).

When you select this check box:

- ▶▶ VisionVPM will not include the transaction in the Holiday Gross calculation.
- ▶▶ VisionVPM will allow the transaction to be processed without having to insert number of days paid in this pay period.

Calculation of maximum earnings will be displayed on the Holiday window. However, if no allowance has been setup with Average/Ordinary earnings ticked, then the default setup will revert back to Rate 1.

Resolved Issues

The following issues have been resolved in this version:

Clients Module

Inability to create batch invoices for syndicates

Go to: **Clients** menu > **Batch Invoicing** > **Insert**.

In the previous version, VisionVPM incorrectly calculated the syndicate membership percentage when you attempted to enter a batch invoice for a syndicate. This resulted in no invoice being generated.

The issue only occurred if you had added a history record of the syndicate.

Now, VisionVPM will correctly generate batch invoices for syndicates.

VisionVPM not saving Lab Result

Go to: **Clients** menu > **Animal Details** > select animal > **History** tab > **Lab Results** > **Insert**.

Previously, if you pressed F7 after entering data into the **Result** field, VisionVPM did not save the result. To save the result you had to press TAB to the next field and then press F7.

This has now been corrected and you can press F7 to save the result.

Incorrectly worded animals' names on merged Word document

Go to: **Clients** menu > **Reminder Schedule** > select reminder options > **Run** > **Merge** > **Word**.

VisionVPM previously, incorrectly displayed multiple animals name on a merged document.

This occurred when a client had multiple animals which had multiple reminders.

Now, Vision will correctly display the animals' names.

Incorrect transactions lines on the Selected Invoices report

Go to: **Clients** menu > **Client Details** > select client > **Activity** > select all transactions > **Selected**.

When you had selected all transactions in the Activity window and some of these transactions were payments, Vision incorrectly displayed the GST component for each invoice and included the GST component as part of the Total amount on the report.

Previous version:

Report: Invoice Selection
Range: 1 APR 06 to 2 SEP 10

Date	Code	Description	Animal	Unit Price	Vet	User	Qty	Total (inc GST)
1 APR 06	OB90	AITKE121 - Aitken, Mrs Jenny						
	452	Debtors Opening Balance						-11298.78
	801	Debtors Opening Balance						-11298.78
5 MAY 06	21508	AITKE121 - Aitken, Mrs Jenny	Honey		DF	HA		0.53
	502							0.06
	452	Aitken Code: AITKE121						0.53
	459	lams Canned Fish - 85g		2.12			.25	0.53
5 MAY 06	21514	AITKE121 - Aitken, Mrs Jenny	Lonny		DF	HA		3.95
	459	Padaid - 120ml		15.80			.25	3.95
	502							0.44
	452	Aitken Code: AITKE121						3.95

VisionVPM has been corrected in this version:

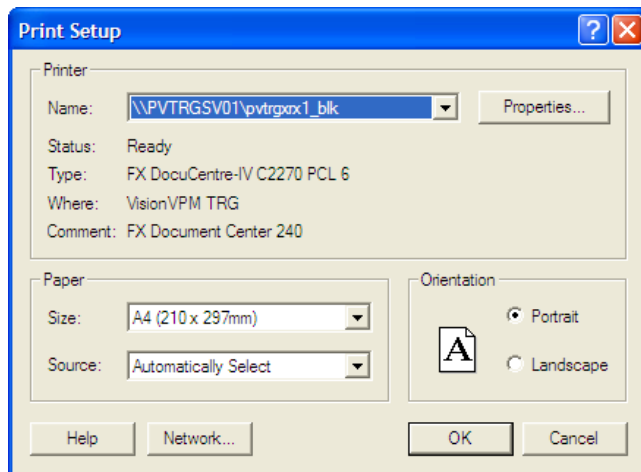
Report: Invoice Selection
Range: 1 APR 06 to 2 SEP 10

Date	Code	Description	Animal	Unit Price	Vet	User	Qty	Total (inc GST)
1 APR 06	OB90	AITKE121 - Aitken, Mrs Jenny						
	801	Debtors Opening Balance						-11298.78
5 MAY 06	21508	AITKE121 - Aitken, Mrs Jenny	Honey		DF	HA		0.53
	459	lams Canned Fish - 85g		2.12			.25	0.53
5 MAY 06	21514	AITKE121 - Aitken, Mrs Jenny	Lonny		DF	HA		3.95
	459	Padaid - 120ml		15.80			.25	3.95

Drug Label printing when user clicks Cancel

Go to: **Clients** menu > **Animal Details** > **History** > select drug > **Print Drug**.

Previously, VisionVPM printed a drug label when you clicked **Cancel** on the Print Setup window.



Now, VisionVPM will only print a drug label when you click **OK** on this window.

VisionVPM incorrectly applying discount reversals to credit notes

Go to: **Clients** module > **Reports** > **Check Expired Discounts**.

When you had entered a credit for a stock item dated the month following the original date of purchase, VisionVPM was incorrectly reversing the discount.

This issue has been corrected in this version.

Inability to delete clients that were attached to a deleted syndicate

Go to: **Clients** menu > **Client Details** > **Commands** > **Delete**.

VisionVPM disallowed you to delete a client if that client was attached to a syndicate and you had previously deleted the syndicate.

Now, you can only delete a syndicate member as long as there is no financial activity after the Year Begins date. You can also delete the syndicate if there is no financial activity after the Year Begins date.

Recovered Clients incorrect in Client Patient Monthly Activity report

Go to: **Clients** module > **More Reports** menu > **Client Patient Monthly Activity**.

In the previous version, VisionVPM was calculating the Recovered Clients for the previous 12 months and not the number entered on the Client Patient Activity window.

This issue has been corrected in this version.

Stock Module

Inability to open Stock List window

Go to: **Stock** menu > **Stock Details** > select stock item > **Formula** > double-click component > click the **Stock Code** arrow.

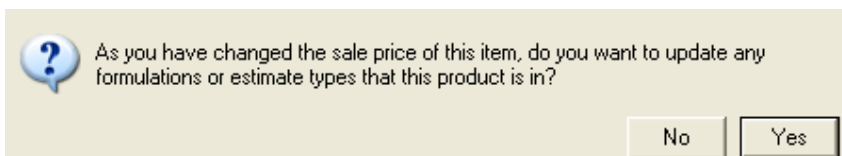
Previously, intermittently, VisionVPM did not display the Stock List window when attempting to view the details of a formulation component.

This issue has been corrected in this version.

Formulation / Estimate update prompt not displayed

Go to: **Stock** menu > **Stock Details** > select stock item.

When you changed the **Pack Cost** of a stock item, VisionVPM did not display the following prompt in certain circumstances:



VisionVPM did not display the prompt if you pressed TAB until you had passed the **Incl GST** field.

This has been corrected in this version.

Stock description not updating in formulations when changed

Go to: **Stock** menu > **Stock Details** > select stock item.

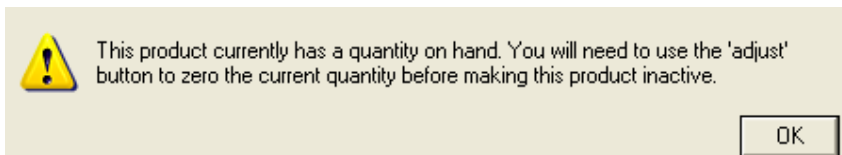
When you changed the description of a stock item that was used in other formulations, VisionVPM did not change the stock description in those formulations.

Now, VisionVPM correctly updates stock descriptions in all formulations.

Ability to inactivate stock item with a negative stock on hand amount

VisionVPM incorrectly allowed you to inactivate a stock item which contained a negative stock on hand amount.

Now, VisionVPM displays the following message when you attempt to inactivate a stock item which contains any onhand amount.



Stock items reappearing on Stock List

Go to: **Stock** module > **Reports** menu > **Stock List** > make selection > **OK**.

VisionVPM displayed all stock items on the Stock List window when you took the following steps:

- 1) Cleared stock items from list.
- 2) Edited a stock item.
- 3) Closed the Stock Details window.

When you returned to the Stock List window, VisionVPM redisplayed all the stock items that you had originally cleared from the list.

This issue has been corrected in this version.

Inability to send Provet e-Order orders or check for invoices

Go to:

- ▶▶ **Stock** menu > **Stock Ordering** > **Stock Reorder**.
- ▶▶ **Stock** menu > **Stock Ordering** > **Goods on Order**.

Previously, on occasion, the buttons to send Orders to Provet were disabled.

This issue has been corrected in this version and you are now able to send and receive orders.

Appointment List

Blocked message removed

Go to: **Main** menu > **Appointment List** > right-click timeslot > **Block**.

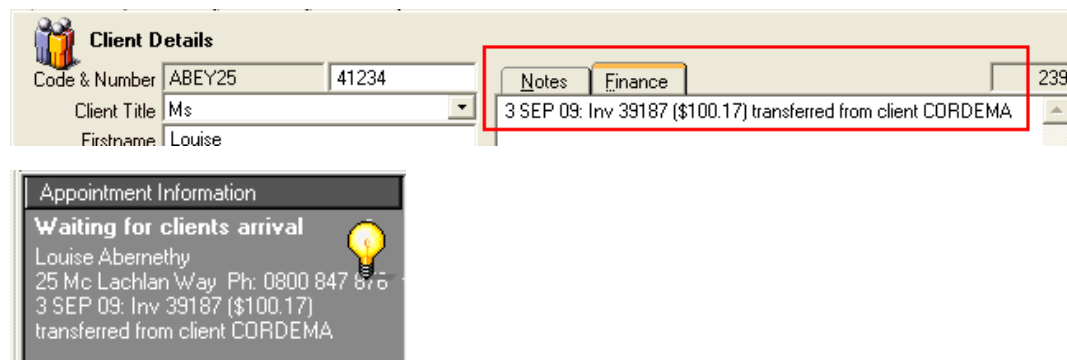
When you entered a message for blocking the appointments and then selected the timeslots to block, VisionVPM incorrectly removed the message.

Now, the message is displayed throughout the blocking procedure.

Finance notes showing in the Appointment List

VisionVPM incorrectly displayed the notes from the **Finance** tab of the Client Details window in the **Appointment Information** area of the Appointment List.

This only occurred when the client had a visual icon loaded.

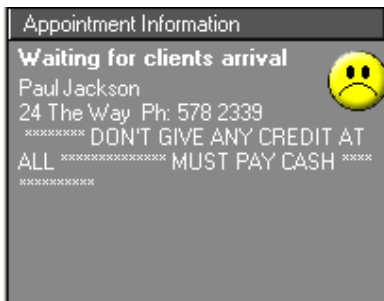


Now, VisionVPM displays the **Visual Note** in the **Appointment Information** area of the Appointment List.

Custom Fields:
 No of Calves
 Occupation

Misc Settings:
 Extra Number
 Charging Distance: (Kms)
 Discount Multiplier
 Client Credit Limit
 Visual Reminder

Visual Note

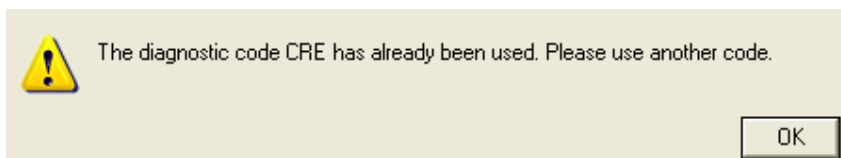


Maintenance Module

Unable to use the same Diagnostic Test Type with different species

Go to: **Maintenance** menu > **Codes and Descriptions** > **Clinical** > **Diagnostic Types**.

Previously, VisionVPM displayed a warning message when you attempted to insert an existing diagnostic type with a different species.



This issue has been corrected in this version and you are now able to create duplicate diagnostic types providing you specify a different species.

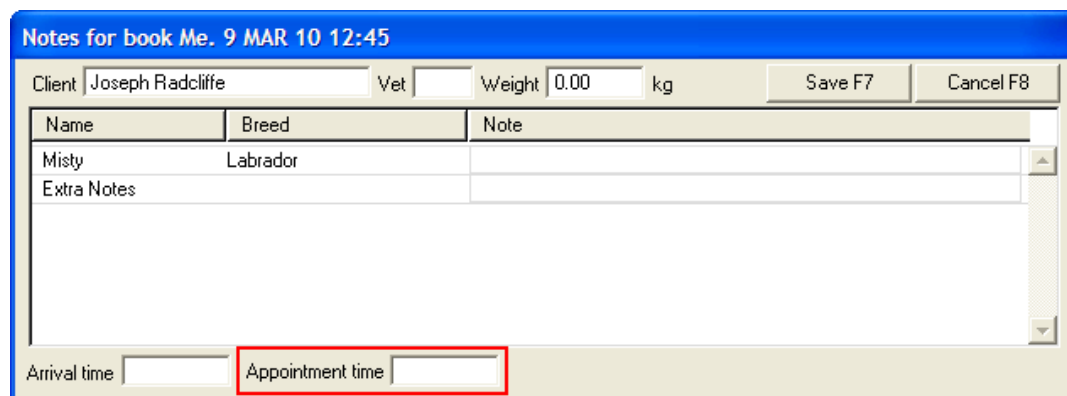
Appendix A: VisionVPM Release Notes v340.031

Changes to the Appointment List

Ability to delete appointment time

Go to: **Main** menu > **Appointment List** > select blank timeslot > navigate to client/patient > create appointment.

VisionVPM has been changed to allow you to remove the **Appointment time** when creating a new appointment. This change allows you to paste the appointment into your chosen timeslot.



The screenshot shows a software window titled "Notes for book Me. 9 MAR 10 12:45". At the top, there are input fields for "Client" (Joseph Radcliffe), "Vet", and "Weight" (0.00 kg), along with "Save F7" and "Cancel F8" buttons. Below this is a table with columns "Name", "Breed", and "Note". The table contains one row for "Misty" (Labrador). Below the table is an "Extra Notes" section. At the bottom of the window, there are two input fields: "Arrival time" and "Appointment time". The "Appointment time" field is highlighted with a red rectangular box.

As in the previous version, you cannot remove the **Appointment time** when you edit an existing appointment.

Resolved Issues

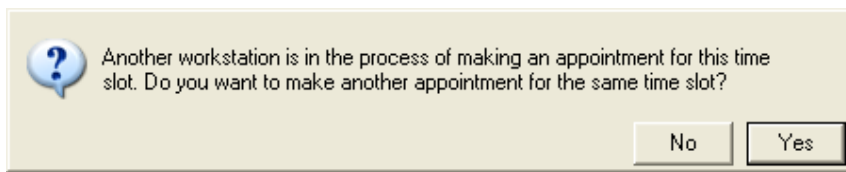
Appointment timeslots unavailable

Go to: **Main** menu > **Appointment List**.

VisionVPM displayed a warning message that an appointment timeslot was unavailable, when it was free. This only occurred in the following circumstances:

- 1) You had selected a timeslot and clicked **Client** or **Animal**.
- 2) You clicked **Close** on the Client Details or Animal Details window.
- 3) You selected the same timeslot as you did in 1) above and clicked **Client** or **Animal**.

A message similar to the one below was displayed.



This issue has now been corrected.

Opening Balances unavailable on Account Activity report

Go to: **Main** menu > **General Ledger** module > **Reports** menu > **Account Activity**.

Previously, VisionVPM did not display the **Opening Balance** of accounts in this report.

Report Name: General Ledger Account Activity
 Date Range: 1 MAR 10 to 31 MAR 10
 Selection: Account Codes: 1011

1011 Prof Fees Large Animal				Debit	Credit	GST
Date	Change Date	Type	Code			
Opening Balance			0.00			
1 MAR 10	1 MAR 10 10:39:31	Dr Inv	40691		1072.09	134.01
1 MAR 10	1 MAR 10 10:40:28	Dr Inv	40722		35.56	4.44

This issue has been corrected and the **Opening Balance** is now displayed.

Report Name: General Ledger Account Activity
 Date Range: 1 MAR 10 to 31 MAR 10
 Selection: Account Codes: 1011

1011 - Prof Fees Large Animal				Debit	Credit	GST
Date	Change Date	Type	Code			
Opening Balance			-232304.26			
1 MAR 10	1 MAR 10 10:39:31	Dr Inv	40691		1072.09	134.01
1 MAR 10	1 MAR 10 10:40:28	Dr Inv	40722		35.56	4.44

