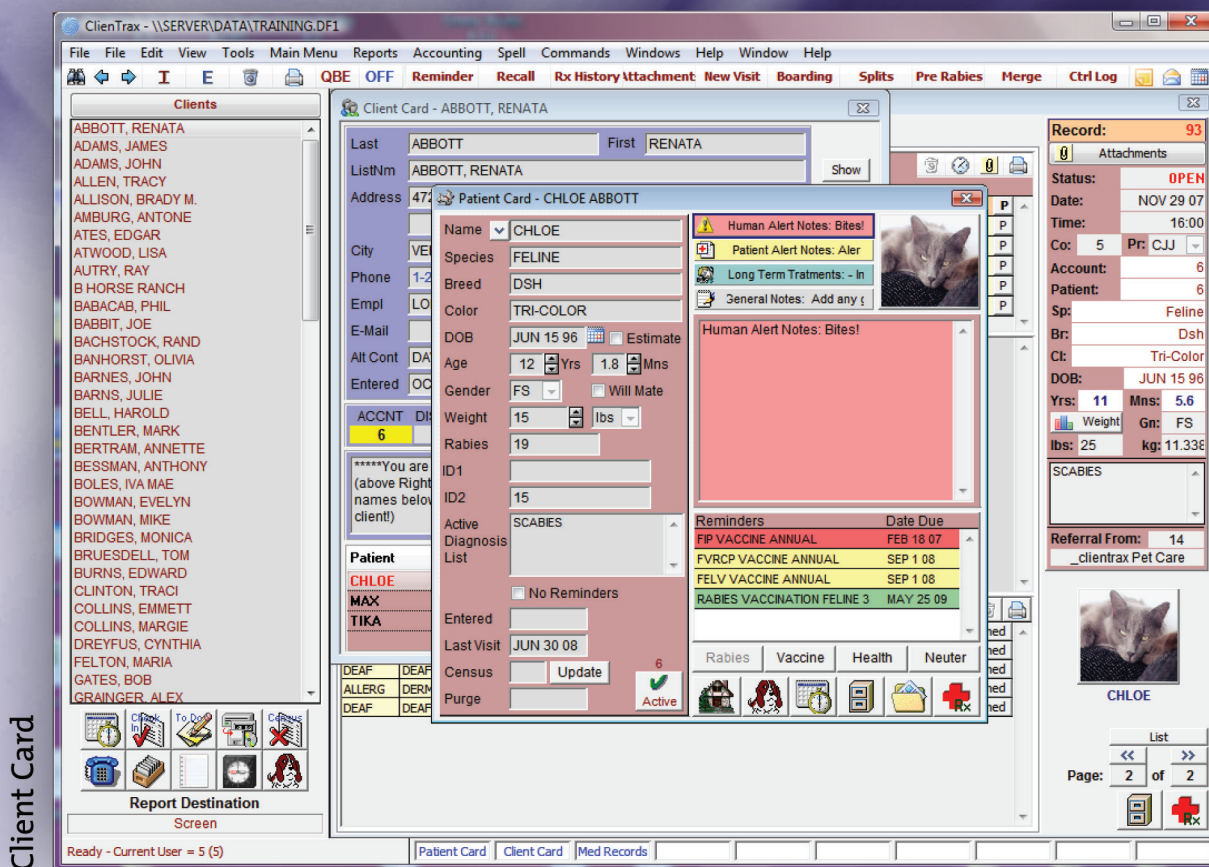# *Welcome* to ClienTrax Veterinary Practice Management Software

Client Card

Powerful Features Make ClienTrax a Dominant Force!

ClienTrax is a powerful software program developed exclusively for the veterinarian—and the unique tasks of a veterinary practice.

ClienTrax' powerful and versatile features are designed to be both comprehensive and intuitive. You can expect ClienTrax to have all the functions necessary to manage your veterinary practice—AND ClienTrax looks and feels familiar, because each window resembles actual paper forms and documents that you've been using for years.
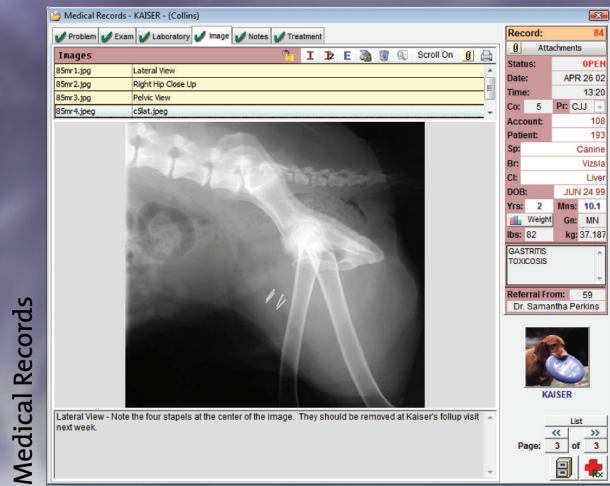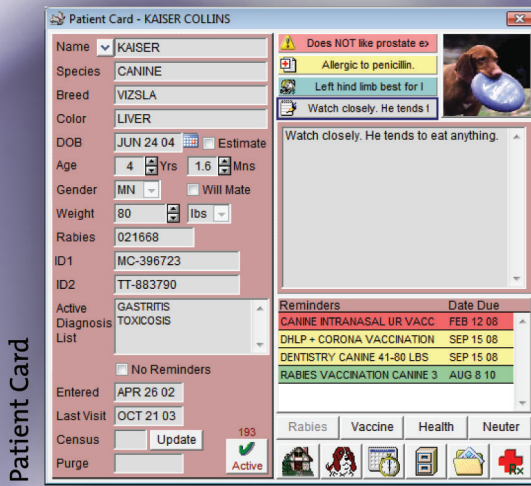
Three levels of ClienTrax... Which one is right for your Practice?

Unlike most practice management software, ClienTrax is not "one size fits all". The following pages will outline each of the three ClienTrax levels, to help you determine which version is the best fit for your individual practice.

1. ClienTrax BASIC

ClienTrax BASIC was designed to include the minimum essentials for a small "just getting started" or "on a budget" practice. And, when the time is right you can easily add new workstations or upgrade to STANDARD or PREMIUM to enhance your capabilities.

Client Card

Appointment Calendar

SOME features of the ClienTrax BASIC include:

- **Client Card and Patient Records**—Clients can be selected by name from an active list (not just a number). All important information is visible at a glance on the Client Card.

- **Invoicing**—View your list of items/services in numerical or alphabetical order while Invoicing. Just click to select an item/service.

- **Accounts Receivable**—Automatic aging of accounts. Print Statements.

- **Inventory**—Complete cost and quantity tracking, batch rollup of prices and more. You can track your profit by item or category. Inventory automatically integrates with other parts of ClienTrax.

- **Reminders/Recalls**—Any item or service can trigger a reminder or phone recall. No limits!

- **Appointments / Calendar**—Automatically fills in Client/Patient data when you make an Appointment.

- **Prescription Labels**—Pre-defined prescription label for any item in Inventory. Just print!

- **Word Processor**—Communicate with your clients. Create letters and forms. Save as a PDF or email directly to the client.

- **Query by Example (QBE)**—Design your own search to find: all cats 10 years old; all animals of a specific breed; clients who have spent over $xx.xx this year, etc. Print lists and labels.

- **Reports**—Over 100 built in: Vaccination, Rabies and Heath Certificates. Labels and Postcards. Many Financial, Client and Patient Reports: e.g. track income by provider.

- **Multiple Levels of Password Protection**—Automatically controls access for peace of mind.

- **Multiple Printer Support**—Reports automatically sent to any printer, FAX modem, file or screen in the office.

- **Medical History**—Complete patient history at the touch of a button.

2. ClienTrax STANDARD

ClienTrax STANDARD is our most popular product. It has all the features of ClienTrax Basic AND adds the most requested features that a growing practice needs to be successful. AND, there's always an option to purchase additional add-ons!


Patient Card

Medical Records

SOME features of the ClienTrax STANDARD include:

- **Paperless Medical Records** —Create your own templates and pick from a list! Automatically send treatment items to a held invoice. Capture and store pictures! Store CBC, UA, Chemistry Profiles, etc.

- **Access Peripherals** —Supports lab equipment, electronic cash drawer, touch screen, credit card readers, bar code and voice recognition.

- **Referral Tracking**—Find how your clients selected your clinic.

- **Purchasing Module**—Integrate purchasing with Inventory Control.

- **Buy Cards**—Track all aspects of each item you purchase for inventory, Vendors, past and current pricing, delivery time.

- **Time Clock**—Accurately track employee work hours.

- **Advanced QBE**—Search multiple databases at once: All dogs and cats that have not had a dental exam; all dogs in a specific zip code.

- **Custom Documents**—Create your own forms (Certificates, Locally required forms, Admissions, Surgery, etc.) And link your ClienTrax Data to them.

- **Custom Reports** —Select the information you want on your reports.

- **Boarding Module**—Define your own housing types and number of units. Just click to add a reservation. Automatically charge the clients for the days that the unit is occupied. Define multiple price levels.

- **E-Mail**—Correspond with your clients via E-mail with reminders and letters.

- **Supports Out-Of-Drawer Cash Payments**— Correctly tracks payments made from the cash drawer. (Pizza Day!)

- **Contact Manager**—Create your own personal and professional directory.

- **To Do Lists**—Keep track of your things to do, recalls, and appointments.

- **Full Remote Access**—Operate from home or other clinics.

- **Phone Dialer**—Click to call clients, vendors or other numbers.

3. ClienTrax PREMIUM

For the demanding practice, Clientrax PREMIUM Has it all—All the features of ClienTrax BASIC, ClienTrax STANDARD, Plus a complete General Ledger Accounting System.
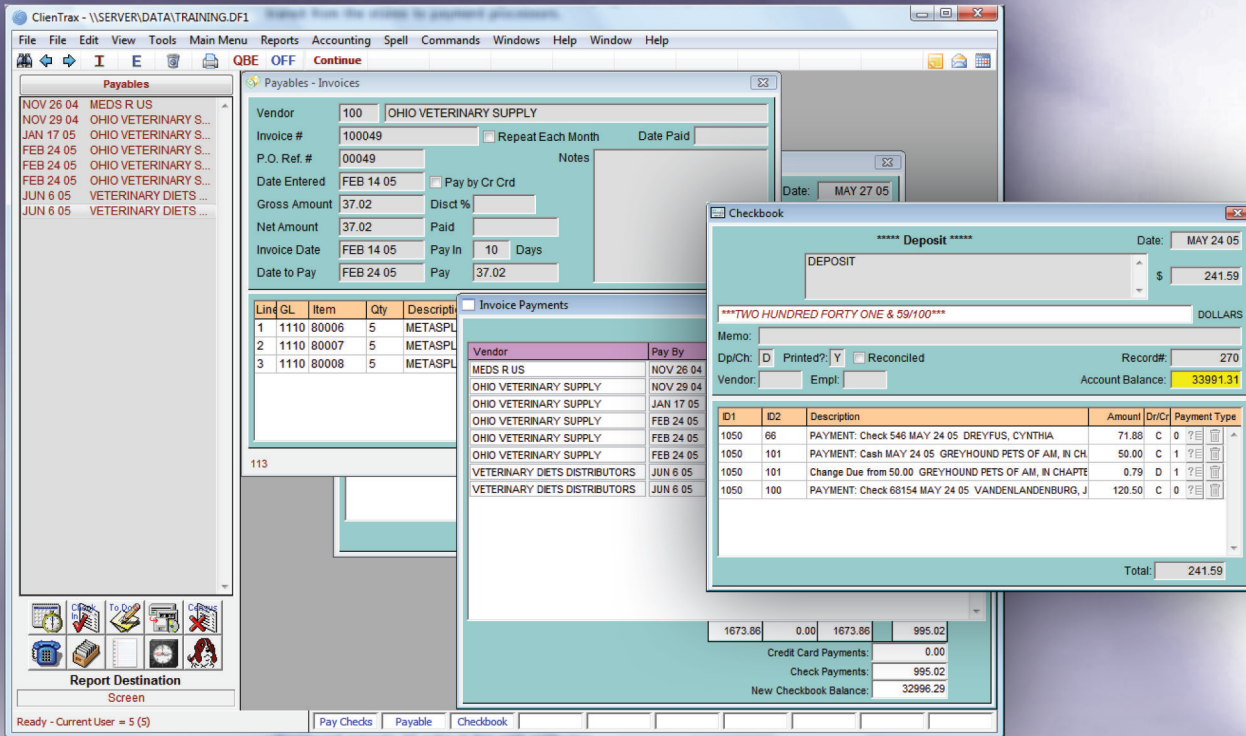

ClienTrax Full GL Accounting includes:

- **General Ledger** – Complete double entry accounting system. Built In! No need to transfer information to another program. Enter data once and only once! Trial Balance, Balance Sheet, Profit and Loss statements, Cash Disbursements, Account Activity by any range of periods.

- **Accounts Payable** – Fully integrated with Purchasing, Inventory and Checking. (Make payments by check or credit card.)

- **Payroll** – Automatically calculates pay, deductions, taxes and other withholdings. Prints Checks, Stubs and other reports.

- **Checking** – Create and Print Checks. Automatically up-dated from Accounts Payable and Payroll. Just click to reconcile!

- **Budgeting** – Enter your expectations and compare against your actual figures. Helps you identify and rein in those expenditures.

- **Tax Reports and Forms** – Sales Taxes, payroll taxes, W-2, W-3, 940, 941, etc.

4. ClienTrax ADD-ONS

In Addition to the comprehensive array of features included in ClienTrax STANDARD, We also offer the following Add-On Modules that can be purchased separately with either product:
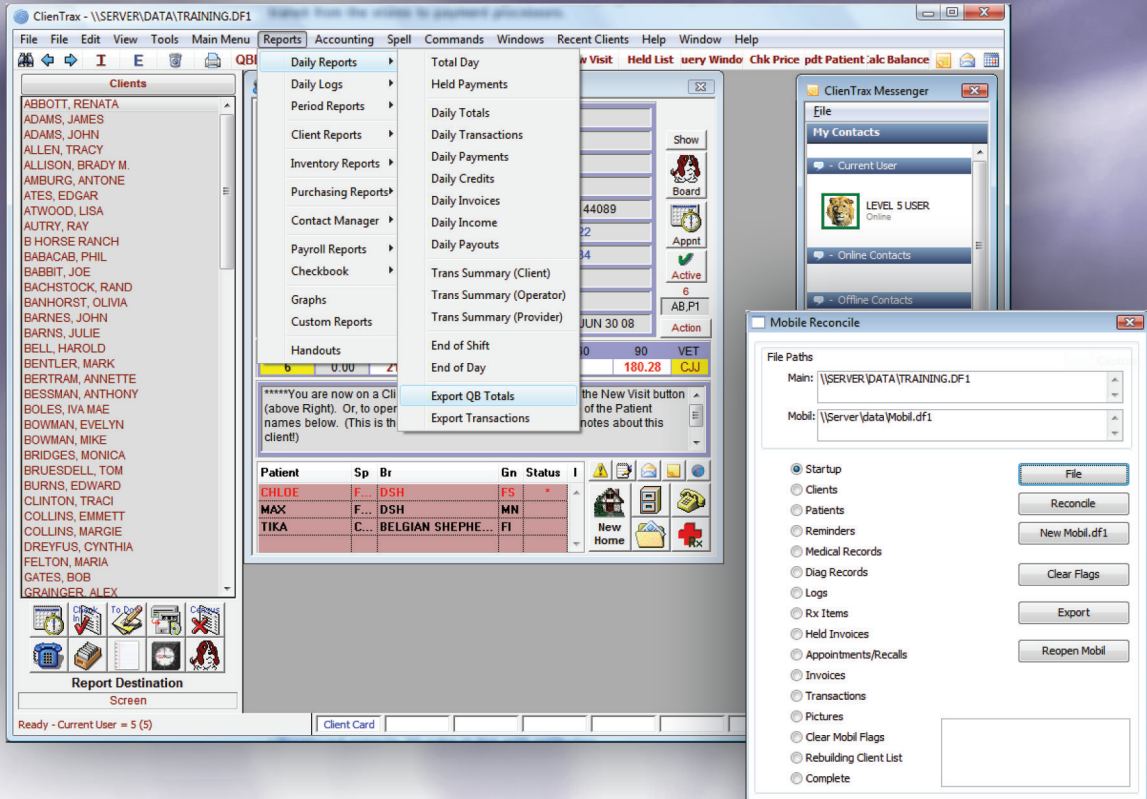
- **Export To QuickBooks™**—You can run a simple procedure at the end of the day to export the daily totals to your QuickBooks™ software.

- **Mobile Vet**—Use a laptop in the field! Add clients, patients, invoices, transactions, reminders, prescriptions, medical records and pictures. When you come back to the office, automatically reconcile to the main data file.

ClienTrax "DirectResponse" Client Support:

No Worries

ClienTrax DirectResponse Customer Support Program is designed to put you directly in touch with the creators of the ClienTrax software—for quick, accurate answers to your ClienTrax questions. Everything you need to know about your ClienTrax software is just a phone call away. And, the benefits of DirectResponse go beyond phone support. ClienTrax DirectResponse Customer Support Program includes:

- **Easy access** to expert technical assistance via an 800#, Fax or E-Mail

- **A semi-yearly update CD** that contains the latest version of ClienTrax

- **An informative monthly newsletter** with comprehensive discussions on relevant topics, tips & tricks, and input from other ClienTrax users

- **Access to the ClienTrax web page** where you can download the latest ClienTrax updates.

- **Low yearly support rate**; the lowest rate among our competitors

- **PLUS—The inside track** on helping to decide the future direction of ClienTrax—Tell us what YOU would like to see, we'll listen.

The ClienTrax Advantage...

Powerful Features, Smooth Integration, "Direct Response"™ Client Support—ALL AT A COMPETITIVE PRICE

System Requirements	Windows	Macintosh	Printer
	Windows XP or Vista.	Core 2 Duo processor.	Laser, Inkjet, Dymo (CoStar)
	Core 2 Duo Processor or compatible.	OS 10.4.7 or greater.	label printers are supported.
	512 MB Ram	512 MB Ram	
	High Color / 16 bit display.	High Color / 16 bit display.	

We dare you to compare to <u>any</u> other system at <u>any</u> price (especially those costing 2 to 4 times more)!

ClienTrax_{TM} Practice Manager
Reach your clients like Never Before!

We accept Cash, Check, M/C, and Visa. We can arrange monthly payments. We will also work with your leasing company.

PRICE LIST:

ClienTrax_{TM} **Software** Single User **$3,000**

ClienTrax_{TM} **General Ledger Module** ……………… …………………….**$1,000**

 ClienTrax_{TM} **Mobile Vet Module** **$495**

ClienTrax_{TM} **QuickBooks_{TM} Export Module** **$295**

ClienTrax_{TM} **Multi-User**
Add for each additional user license **$295**

ClienTrax_{TM} **Plus**
A package of 5-user licenses ....$**1100**

Hardcover User's Manual ....**Included!**
6 months, all support and phone training, TOLL FREE ....**Included!**

ANNUAL SUPPORT AND MAINTENANCE FEES ....$600su/$900mu
With General Ledger ....$700su/$1000mu
(Includes toll-free support and software upgrades.)

DATA CONVERSION
Send your data in any of several formats ....Call for quote

ON-SITE TRAINING ....Call for quote
 (Telephone Training Sessions are included in your purchase price. Call for details.)
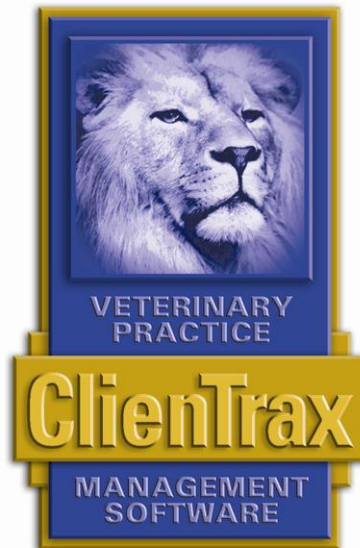
Introduction to

ClienTrax™

Demonstration Version

ClienTrax is a trademark of Custom Information Systems, Inc.
MS-DOS, Microsoft Windows and Microsoft Windows XP are trademarks of Microsoft Corporation. Macintosh is a trademark of Apple Computer Corporation.

HP, and HP LaserJet are trademarks of Hewlett–Packard Company.

WELCOME!

Thank you for choosing to review *ClienTrax*. *ClienTrax* is a powerful business management system for small, medium and large sized veterinary practices. Debuting in 1987, *ClienTrax* was the first Veterinary Practice Management Software developed in Microsoft Windows. Starting in one clinic, *ClienTrax* is now used all over the United States and Canada, as well as many countries throughout the world.

ClienTrax is packed with features that make it easy to create, track, and access important business and client data. However, as with anything with a lot of depth, you sometimes cannot immediately see all that is there. Whether you learn by experimentation, reading the manual, or from an associate, it takes time to explore the program's many features. We want to help you. This Demonstration version of ClienTrax is fully functional. However, keep in mind that this document is an abbreviated version of the full ClienTrax User's Manual. Please do not hesitate to call us if you have questions on any function or would like to explore a specific area in more detail.

If you need help with any portion of this manual or using the Demonstration program, please do not hesitate to call us at the numbers below. We can be reached from 8am to 9pm Eastern Time, Monday though Friday. Feel free to ask us to schedule a "Getting Started" session at other times that may be more convenient for you. You can also e-mail questions to sales@clientrax.com

1-800-416-2815 - 1-614-875-2245

Setting Up the ClienTrax Demo

Before you can use the *ClienTrax Demo*, you need to install the *ClienTrax Demo* program on your computer.

Basic System Requirements

To use *ClienTrax*, you need the following as a minimum:

For Microsoft Windows compatible computers

Pentium 4 or Core 2 Processor or Compatible

512 MB of RAM / 1 GB for File Server

1024 x 768 resolution monitor or higher

High Color / 16bit display

Windows 2000, XP, Vista, or Windows 7

(Windows 2003 Server is recommended for a dedicated server)

For Apple Macintosh computers

G3 / G4 or Intel Core 2 recommended (includes iMac)

At least 512 MB RAM / 1 GB for File Server

High Color / 16bit display

OS X 10.5 or later

Windows Installation:

Installing from the CD

1.)   Insert disk into the CD-ROM drive on your computer.

2.)   In a few seconds the ClienTrax Installation Menu should appear. (If it does not, open My Computer and Double Click your CD icon to open it.)

3.)   Select the Demo Install button. The Demo Install program will start.

4.)   You will be prompted through the installation process. ClienTrax is set to install to **C:\ClienTrax Demo**. <u>PLEASE DO NOT CHANGE THIS!</u>

5.)   After the installation has finished, remove the CD from the drive.

6.)   Double-click on the ClienTrax Demo icon on your desktop. You will now be presented with a password screen for the demonstration data file. There is no password set up in this file, so you can simply press <Enter> or click OK to go into the file.

Macintosh Installation:

Installing from the CD

1.)   Insert disk into the CD-ROM drive on your computer.

2.)   Open the CD by double clicking the ClienTrax CD icon.

3.)   Double click on ClienTraxDemo.zip

4.)   Click **Continue** at the next screen.

5.)   Select the Hard Drive or Desktop to install to, then click **Save**.

     Note: *ClienTrax Demo* is set to install to a folder named **ClienTrax Demo**. <u>DO NOT CHANGE THIS!</u>

6.)   Double click the clientrax.lbs file in the ClienTrax Demo folder. You will now be presented with a password screen for the demonstration data file. There is no password set up in this file, so you can simply press <Enter> or click OK to go into the file.

Features in ClienTrax

ClienTrax has many features to help you easily create, revise, and follow up with your clients. This section provides an overview of the features in *ClienTrax*. For more information about the features in *ClienTrax*, please contact our sales office.

Client and Patient Records - You can track your clients and patients by any of the parameters entered in their records. Keep a complete history of their past visits, track Accounts Receivable and print monthly Statements.

Medical History – Tracks every process applied to your patients. You will never again have to search through stacks of folders to see what has happened with your patient.

Track Inventory - You can track your inventory by item, vendor and purchase history. *ClienTrax* also provides an equivalent to inventory buy cards.

Accounting - With the accounting application (optional), you have access to a general ledger, tracking accounts payable, purchasing and payroll.

Keep informed of your costs - The *ClienTrax* accounting application enables you to track costs.

Maintain transaction information - Equip your staff with tools that enable them to organize clients, patients, management records, quotes and visits, and to maintain a comprehensive history of activity.

Quickly switch between applications - A Records List window enables you to quickly switch between applications in which to work. A list of previously created records for each application displays in a scrollable list box within the window.

Choose commands on the Tool bar - Click buttons on the Tool bar to quickly choose most frequently used *ClienTrax* commands. Select and edit active records, insert new records, delete existing records, or send a record with its data to the printer.

Communicate with your clients - *ClienTrax* comes complete with utilities such as Recall List, Reminders Lists and Postcards, To Do lists, Calendars, Frequent Calls list, a Contact Manager, E-Mail, and a Word Processor.

Use alarms - Set predefined times to alert you when an action needs to be performed. You won't forget an appointment or forget to follow up on an important task when you set an alarm.

Track Appointments – You can create Appointment Calendars for as many doctors, groomers, rooms, surgeries, etc. as you wish. View multiple days or calendars at a glance.

Track Boarding – This optional feature (included in Standard and Premium levels of *ClienTrax*) allows you to schedule animals for unlimited housing categories with an unlimited number of units (cages) in each. *ClienTrax* allows you to choose any housing type for any animal. When it is marked as occupied, it automatically forwards the charges to the New Visit (Invoice). You may also print feeding schedules, schedule activities such as grooming and vaccination updates, and track other treatments during the boarding stay.

Manage Medical Records – Also an option (included in Standard and Premium levels of *ClienTrax*), the *ClienTrax* Paperless Medical Records system is designed to minimize typing. Create as many templates as you wish. Each time you wish to start a new page in the medical record, select one of your templates as the starting point.

Monitor Hospital Census – For a "paperless" system, you can track patients throughout the hospital with the *ClienTrax* Census system.

Manage employee hours with Time Clock – Each employee can log in to start his or her time clock record, log out to complete it. *ClienTrax* automatically totals the hours for each pay period (included in Standard and Premium levels of *ClienTrax*).

Symbols and Conventions

The *ClienTrax* documentation uses a few special symbols and conventions.

The Keyboard

♦ The keys on your keyboard may not be labeled exactly as they are in this manual. All key names are shown using the < and > symbols. For example, the key with the ↵ is shown as <Enter>. The hyphen key (-) is shown as hyphen <->.

♦ Keys are frequently used in combinations. For example, <Ctl>+b means to hold down the control key while pressing the "b" key.

Moving Around the Screen

♦ Mouse clicks are used to place the cursor in data entry fields, to scroll a screen, to choose a command in a menu and for choosing command buttons.

♦ By using keys on the keyboard, you can move around to different data entry fields. To move from field to field use the <Tab> key on the keyboard.

♦ Using the <Alt> key in conjunction with a menu's accelerator letter drops down that menu's list box of commands. For example, pressing <Alt>+F opens the File menu's list box.

Text

♦ Specific text you are to type is shown in bold. For example, if the manual instructs you to type **TBD 083338** you type the letters "TBD" followed by a space and the numbers "083338".

♦ Placeholders for items such as passwords that you must supply yourself are shown in italic. For example, when the manual says to type *password* you type the assigned password given for your account.

Common Controls

If you are already familiar with Windows and Macintosh, and the various controls—including menus, drop-down list boxes, scroll bars and buttons—you can skip this section.   You'll see many standard Windows controls appear from time to time as you use *ClienTrax*: These include.

♦ **radio buttons** (a circle with or without a dot in it) which can be selected by clicking on them. With radio buttons, only one of the options in the group may be selected.

♦ **check boxes**, (a box with or without a checkmark in it) which can be turned either ON (put a checkmark in the box) or OFF (take out the checkmark) by clicking on them. With check boxes, any number of check box options in the same group may be selected.
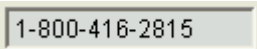
♦ **text input** fields or edit boxes, where you *Insert* new information or *Edit* existing information.

♦ **"drop–down" list boxes**. Normally, a default choice or the last choice made for the action displays in the list box field. When you click on the arrow to the right of a list box, the program displays a list of available choices below the entry field. You can then select another entry by clicking on it.

◆ **Scroll Bars** provide a way to move more information into a screen when all of it does not fit at one time. Click on the up or down arrow in a scroll box to move a screen one line at a time. Clicking inside the scroll bar region causes the screen to move a page at a time.

◆ **Pushbuttons** provide a way to start a ClienTrax procedure or command. An example of a Pushbutton would be the OK button.

♦ If you need more information about the Windows or Macintosh operating systems, please see the documentation that came with your computer.

Starting ClienTrax

After the *ClienTrax Demo* is installed, a *ClienTrax Demo* icon appears on your Desk Top. To begin using the program, double click on the *ClienTrax Demo* icon. A Change Data File window may open. This window allows you to choose the data file you will be using to evaluate ClienTrax (We suggest the Training.df1 file). Once chosen, click **Open**. The Password window opens. **For the demonstration version of the program there is no password, so you can just click OK or press <Enter> on your keyboard.**

Within a short period of time, the *ClienTrax* program appears.
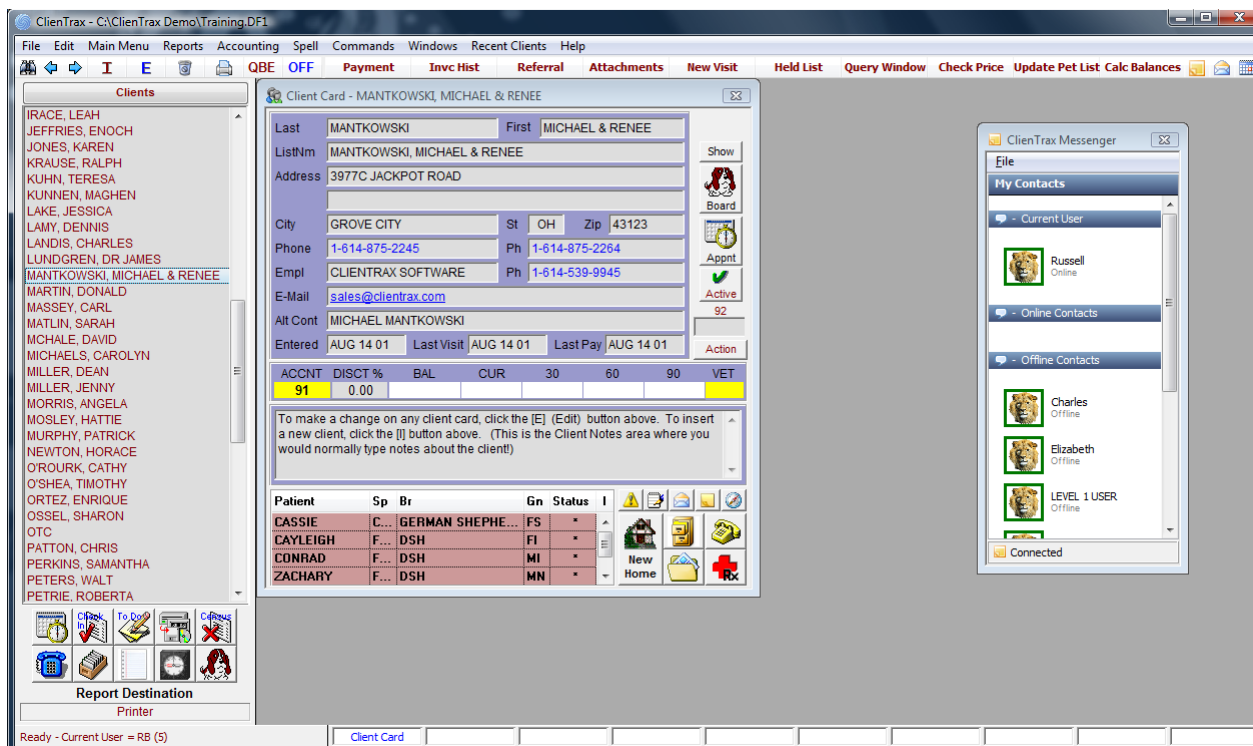
The ClienTrax Interface

ClienTrax is extremely easy to use and navigate. We accomplish this by providing a standard user interface that operates the way you think. The following figure shows the *ClienTrax* standard configuration. Please take a few moments to go over this section in order to understand how to move around in ClienTrax.
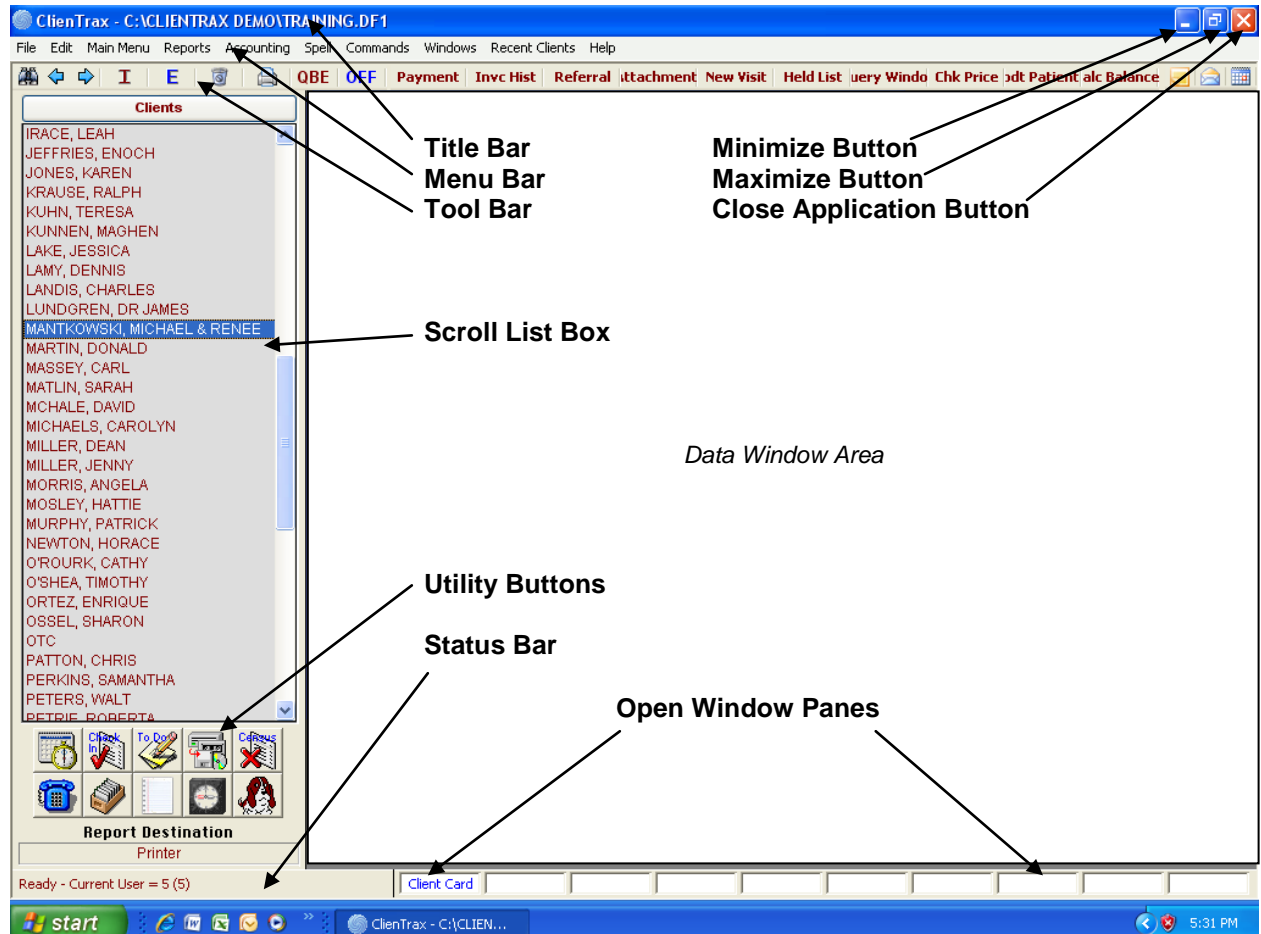
The Title Bar

The title bar is used to show the application (program name) and path to the data file presently in use.

The Minimize Button

This is a Windows feature that reduces the current application to an icon on the Windows taskbar. A single click on the icon will return the application to the active desktop.

The Maximize Button

This is a Windows feature that expands the current application to fill the screen. Clicking this button when the screen is maximized will return it to the original size.

Close Application Button

This is also a Windows feature that closes the current application. If you have unsaved data in the application, you will lose it if you select this option.

The Menu Bar

The menu bar at the top of the screen displays the headings (names of menus) used to access the commands that execute *ClienTrax* actions.
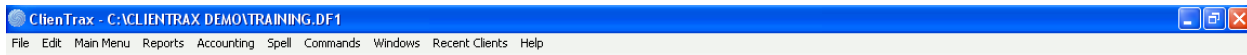
Please note that the Administration Setup Code and the current window in use determine the options presented in the menu bar. You may therefore expect different menu options from the display above.

Menu Use

Opening a menu is accomplished with a single (left) mouse click on the desired menu, revealing the options accessed through your selection. You may then open any of the options from the menu with a single click.

The Tool Bar

The Tool Bar gives you quick access to Command menu options. All the data entry screens use the buttons explained here. Click on an icon or button to immediately activate its associated function.

The number of buttons displayed is dependent on the size (screen resolution video setting of your computer) you assign to your desktop. These buttons provide short cuts to the additional **Commands Menu** functions designed to compliment specific windows. Depending on the window you are using, different buttons are displayed on the right side of the Tool Bar.

With practice, you may find the provided short cut keystrokes to be the most efficient method of activating your options.

From left to right, the standard Tool Bar controls are:

Find (F2)	Click the Find button when you need to find a record in the current card. Any field that is defined as a search key can be used. These search key fields display a flashing cursor when you click on them, or when you use the TAB key to move the cursor into the field.
Previous (F4)	Move to the previous record by clicking on this button in the Tool Bar.
Next (F3)	Move to the next record by clicking on this button in the Tool Bar.
Insert (F5)	Click on this button in the Tool Bar to Insert a new record. A blank record displays in edit mode and is ready for data entry.
Edit (F6)	When a record is displayed and you want to change some information in it, you must first change to the edit mode. Click the Edit button, and the cursor is placed in the first data entry field within the record. Make corrections as necessary.
Trash (F7)	To delete a record, make that record active (displayed in the data entry area) then click the TRASH button. A warning message appears asking whether you actually want to permanently remove the record.

Print (F8) ⎙	Click on this button to Print a record to the default print device. The record will be sent to the output device chosen for the card. Some cards have more than one print option, so selecting this button will open a print menu from which to choose.
QBE **QBE**	QBE(Query by Example) is a feature unique to *ClienTrax*. It allows you to find a record by looking for text or a number. You will be able to find any type of information in any combination with this command button.
Off/On **OFF**	If you perform a QBE search and then open another window, ClienTrax will turn the active QBE to off because the search will not apply to the new window. If you return to the window that you started the QBE on, you can press this button to reactivate the QBE.

The Data Entry Area

The Data Entry Area is the right area of the screen where data entry windows, appear. Each window contains the data required to form a record and is used to enter, edit and display the data associated with a record.

The Main List Window

ClienTrax accesses your active records using a series of Scroll lists and associated data cards. Display the required list in the Scroll list window by:

- Selecting it from the *Main Menu* on the tool bar.
- Clicking on the title bar at the top of the List Window to advance alphabetically to the next list.

Operator access must be approved in the Setup screen before anyone can use these records. (In the demo files, full access is given to every part of the program.)

Each line in the list represents one record. Double click on a record to open the correct data screen to display the record. Use the scroll bar or the arrows to move around the displayed list. You can also move quickly to any part of the list. Click anywhere in the list and type the first character of the item you want to find. After the list moves to display your selection, you may type the second character and then the third character, etc.

Note: As a shortcut, you can click on the **F12** function key of your keyboard to jump back and forth between your current window on the List window. This eliminates the need to move your hands from the keyboard to select something in the list. Simply press **F12** and use the arrow keys on your keyboard to move through the list. Press <Tab> when you have selected the correct item and you will be returned to the Current Window.
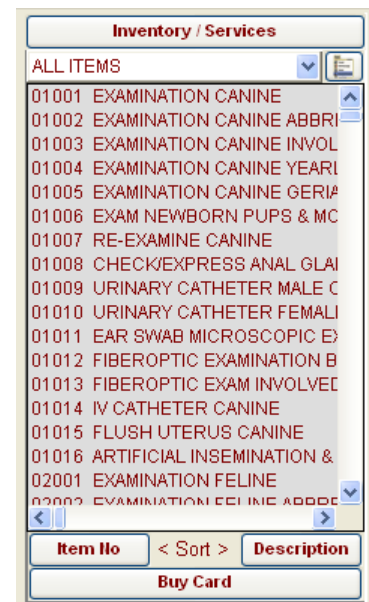
The Inventory Scroll List

In the case of the Inventory list, there are also additional buttons at the top and bottom of the Scroll List Window:

- The *All Items* button presents a drop menu from which you can select to display the entire inventory list (All Items) or just one category at a time.

- The *Categories* button displays all entered inventory categories.

- The *Item No* button displays the Inventory list *by Item number* in numerical order.

- The *Description* button displays the Inventory *by description* in alphabetical order.

- The *Buy Card* button displays the Buy Card for the displayed inventory item.

The Status Bar

Ready - Current User = MJM (5) | Reminders | Patient Card | Client Card | | |
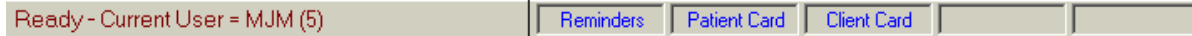
Along the bottom of the screen is the Status bar. The Status bar displays information about the current operator, alerts you to alarms that have been triggered, and indicates when an activity is taking place, for example, when a number is being dialed. On the right side of the Status bar are the Stacked Window buttons.

The Stacked (Open) Window Buttons

Below the Data Entry Area and to the right of the Status Bar are the Stacked Window Buttons. The standard screen displays four buttons representing the top four open windows in the Data Entry Area. However, increasing your workspace area can provide up to ten of these window buttons. To bring a window to the top of the stack, simply choose that window from the Window menu or click on the Stacked Window button with its name.

The Utility Buttons

Located beneath the List window are ten buttons that access utilities for organizing your daily activities. To start any one of these utilities, just click on the desired button and the utility appears in the Data Entry Area.

Appointments	Opens the Appointment Window displaying the current date's appointments for the currently selected provider.
Check In	Opens the Appointment Check In Window that shows the status of today's appointments. (Have they checked in?)
To Do	This button opens a personal list of important events that may require a special reminder. This utility will keep track of events years in advance as displayed in the To Do list with the option of an on-screen alarm.
Backup	This button opens the ClienTrax Quick Backup window. This allows you to create a copy of your data file. It is not a substitute for a good backup procedure. It should only be used to make quick copies before critical operations like Payroll or Statements that you may want to roll back.
Census	This button opens the Census List window that tells you the status of the patients that are in the hospital at any given time.
Phone List	This button enables you to access or enter frequently called numbers in a personal phone list. You may auto-dial any of these numbers through your modem with a click.
Contacts	The Contacts button opens the contact window allowing you to create a comprehensive data file of your contacts. When used in conjunction with the QBE utility, you may easily create custom lists of these contacts to configure custom mailings or phone lists.

|	
Word Processor	This button accesses the ***ClienTrax*** word processor feature. This feature can be used like most word processors to create forms and letters. With the Custom Documents feature, you can create forms with links to client and patient information to automatically be filled in before printing.
Time Clock	This button opens the Time Clock window where your employees can clock in and out of the office for the day.
Boarding	Opens the ClienTrax Boarding window where you can track patients boarding at your facility.

Printers

ClienTrax supports many different printers at once. When you first start ClienTrax, it may ask you to tell it which of your printers it should use for specific types of reports. You can do this from the Printer Destination Window shown next.

Printer Destination

In Printer Destination, you can set up to seven different printers to print the different categories of your reports. These are:

❑ Reports
❑ Invoices/Statements
❑ Rx Labels
❑ Checks
❑ Mailing Labels
❑ Reminders
❑ ID Cards
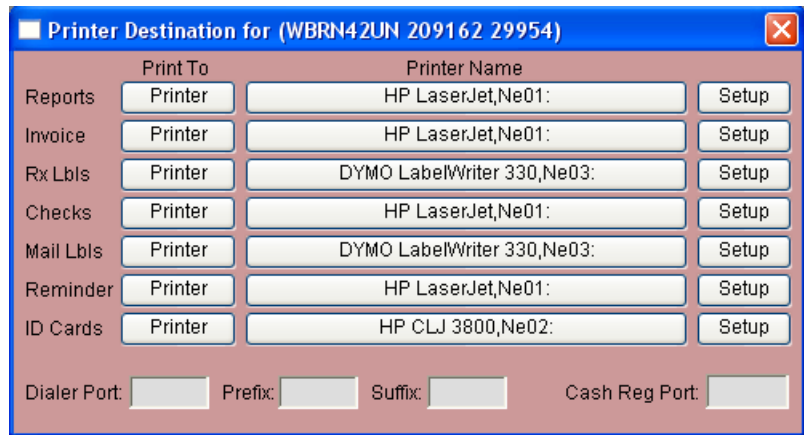
To open the Printer Destination Window, select File / Printer Destination. You tell ClienTrax which printer to use for each type of report by clicking the Printer Name field for each type of report. Once you have set the correct printer, ClienTrax will then use the appropriate Windows Printer Driver to format the report for your printer.

Setup

The sample data files you will look at in reviewing this demo have the most common setup options preset in them. These are options that can be changed to your preferences. For example, if you enter an invoice for a canine annual, you may see a receipt, a rabies certificate, and a client reminder list print after totaling the invoice. The certificate and reminder list may be turned off so that they do not print automatically. You may then print them only if requested by the client.

Setup options may be viewed by going to the File menu, then Administration, and clicking on Setup. A full explanation of the setup options is in the Setup chapter of the ClienTrax User's Manual.
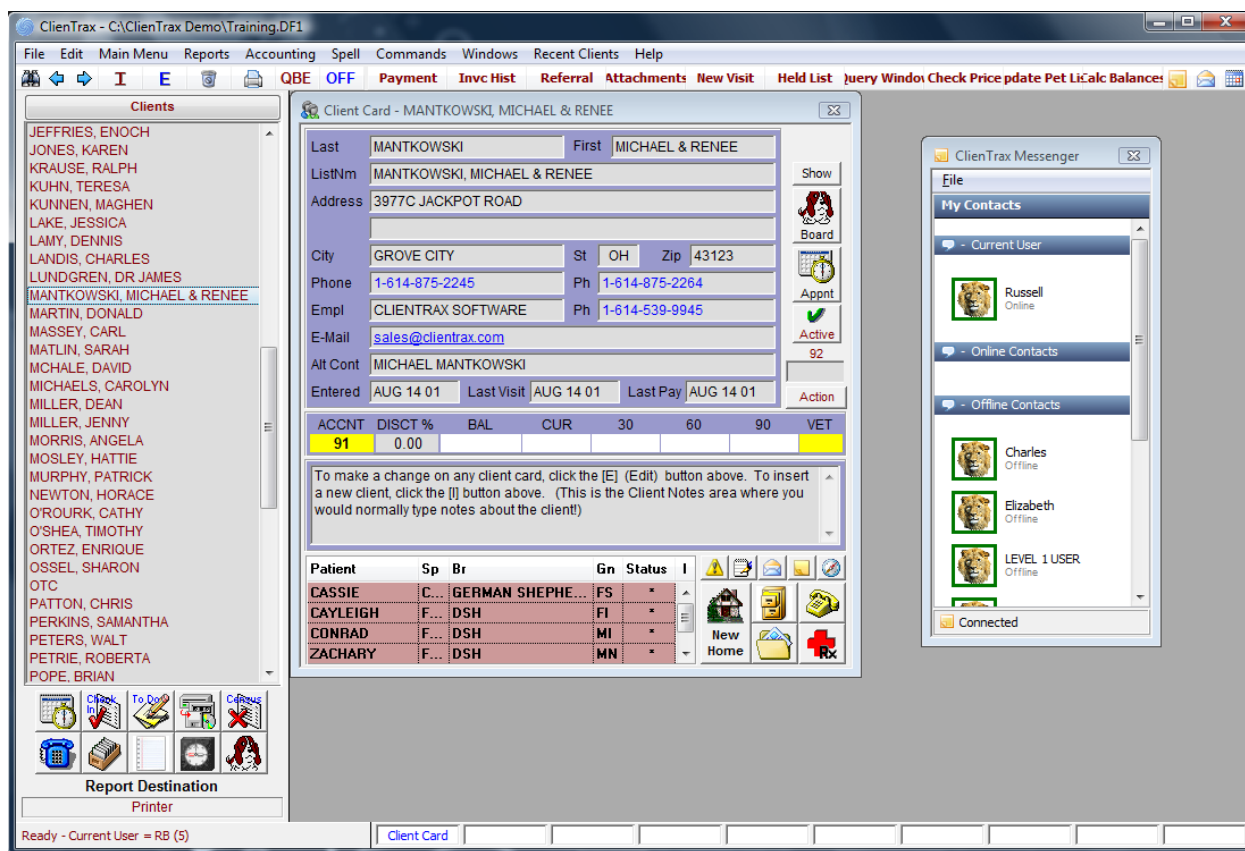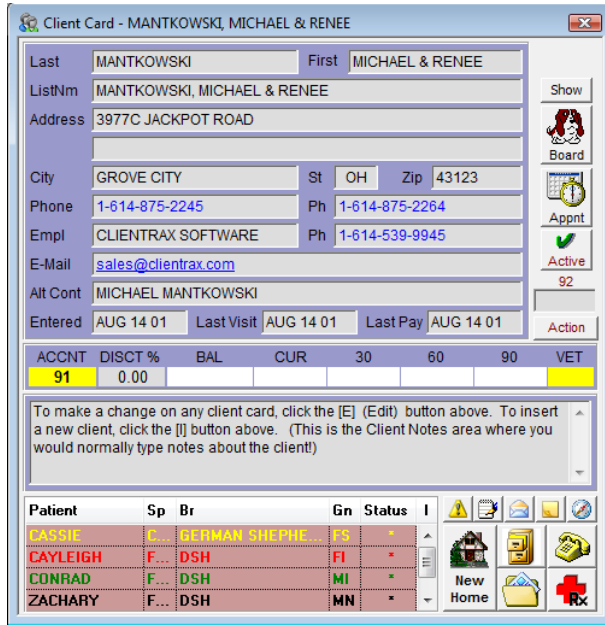
The Client List

Because the Client Card is used more often than any other window, and is the starting point for all client transactions, we have made it so the Client Scroll List and the Client Card open automatically when you start ClienTrax. To display a different Client Card, simply click in the Client List to the left. The information for the selected client will appear in the Client Card window. If you close the Client Card window, simply double click on any client in the list, and the Client Card will reopen with the selected client's information.

Client Card

You will use the *ClienTrax* Client Card to track your clients and the animals they own. The Client Card keeps a record for each client in your practice. Within each client record, you will keep the basic information about the client. You may also use the SHOW button to store additional client information, such as driver's license and social security number. You can also record this information for another adult household member.

Patient records are stored with the client record. These patients are the individual animals owned by the client. If ownership of an animal is later transferred to another client, you may transfer the patient record from one client to another.

The Client Card Window

The Client Card shown at left is a typical example of a client record. From this window you will be able to access all pertinent client information.

Below we have listed each field on the Client Card and explained its use.

Following the field explanation, we will discuss the various buttons and other functions associated with this window. Please read them carefully.

The Client Card (Record) Fields

Last:	Enter the client's last name. The client list is sorted alphabetically by the client's last name.
First:	Enter the client's first name.
List Name:	This is the name that will appear in the list for this client. It will default to Last Name, First Name for this client, but it can be changed. You may want to do this when the actual client is a shelter or stable, etc. whose name you want to appear in the list, but wish to have a person (contact name) in the name fields.
Address:	Enter the client's street address or PO box number.
City:	Enter the city (A default will appear. This default is the city setup in the City field of the Practice Address, set on the Setup window.)
ST: (State)	Enter the 2-letter code for the state or the 3-letter code for the province. (A default will appear. This default is the state setup in the State field of the Practice Address, set on the Setup window.)
Zip:	Enter the Zip or Postal Code of the client. If the code has been entered before, and saved with the appropriate city / state information, the City and State fields will be filled in for you. If the code has not been used before, the Zip / Postal Code window will open. Insert the appropriate city, county, and sales tax rate as required. (ONLY enter sales tax if you are a mobile practice. Tax fields must be left blank on zip code records for practices that have a clinic building to which all clients come.) This will then be saved in the database.
Phone:	Enter the phone number of the client. You may enter just the local number or the complete number with area code. It is recommended that a format standard be decided upon for entering phone numbers. This will make searches easier.
Ph: (Alt Phone)	Enter an alternate phone number for this client.
Empl: (Employer)	Enter the employer for this client.

Ph: (Phone)	Enter a work phone number for this client.
E-mail:	E-Mail address. Clicking this field will open your e-mail utility, ready to send a message to this client. (Assuming you set up the E-Mail options in ClienTrax Setup.)
Alt Cont:	Enter an alternate contact for this client's record: The name of another household member, spouse, etc., for this client record.
Entered:	Date that the selected Client was added to the database.
Last Visit:	This is a display field for the date of the most recent New Visit.
Last Pay:	This is a display field for the date of the most recent client payment.
ACCNT (Account)	This is the account number assigned by *ClienTrax*. (It is assigned in numerical order as you insert new client records.) This is a display field. You should not edit this field.
DISCT %	If you want to provide a discount for this client, enter a discount percentage here.
BAL(ANCE)	This field displays the total balance due for the client.
CUR(RENT)	This field displays the current (<30 days) balance due for the client.
30 (days)	This field displays the 30-59 days balance due for the client.
60 (days)	This field displays the 60-89 days balance due for the client.
90 (days)	This field displays the > 90 days balance due for the client.
VET	Initials of the preferred Veterinarian for this client. These initials will be displayed in the New Visit Window. They can be changed as required.
(Notes)	This is a note field for the client record. Here you may enter any miscellaneous notes you have for the client.
Patient List	The Patient List field will list all Patients belonging to the selected client. The list displays the Patient Name, Species, Breed and Gender. In addition, on the right side of the list you will also see Census codes and Patient Alerts.

Creating a New Client Card (Record)

Once you have opened the client card window, you may *Insert* a new client by selecting the Insert (**I** -F5) button from the Toolbar. A blank Client Card will appear where you can type in the information for each field by pressing TAB to move from one field to the next; Shift-Tab to move to the previous field. When you have finished, select the **OK** button or press <Enter>. If you wish to cancel without saving the new record, choose the **Cancel** button.

Note: The List Name field will default to "Last Name, First Name", but you can change it. For example, you might want to enter the name of a farm or shelter. What is entered into this field is what will display in the Client List on the List Window. If nothing is entered in this field, you will see a "Blank Line" at the top of your Client List.

You may enter additional information on the client if you wish. The *SHOW* button opens an additional record screen for the client. See the section: Button: SHOW.

Selecting a Client Card (Record)

Once you have inserted a Client Card, use the alphabetically arranged Client scroll List to recall the record whenever needed. You may move through the list in four different ways:

1. One line at a time: Click on the arrow on the scroll bar at the bottom of the list to move down one line, or at the top of the list to move up one line.

2. One page at a time: Click below the box on the scroll bar to move down one page; click above the box to move up one page.

3. Several pages at a time: Click on the box on the scroll bar and continue to hold down the mouse button and drag the box to the approximate position on the list. For example, if you want to move 3/4 of the way down the list to look up a client with a last name beginning with "R", click and drag the box 3/4 of the way down the list and release the button.

4. To move quickly to a particular client, you may click anywhere in the list and type the first letter of the client's last name. When the list moves to that letter, type the next letter in the name. Once you have located the client you want, double-click on the client name to open the client card.

Editing a Client Card (Record)

Open the Client Card and find the client you want to edit as described above. Click on the Edit (**E** – F6) button to change the client record. Move to the field you wish to edit by using the TAB key, or by clicking on the field with the mouse pointer. Make the desired changes, then click on the **OK** button or press <Enter>. (If you want to exit without saving the changes, click on the **Cancel** button.)

Client Card Reports

If you select the Print Button when you have a Client Card open, ClienTrax will display a pop up window from which you can select from among many client related reports. A few examples are Client Card, Reminder List, Account History, File and Mailing Labels and many more.
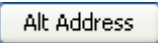
Show **Show**

The Show button opens another window with additional fields for recording information about the client. You may record some of the information or none of it. If you feel you need to use one of the numerical fields for another number important to your practice, you can do so. There is a Notes field you can use to keep additional notes on the client. If you have Active Alerts turned on, notes entered into this field will "pop up" on screen when you access this client. The same procedures regarding other windows applies: Use the Edit, OK and Cancel buttons as needed. Clicking the Hide button that replaced the Show button will take you back to the regular client card fields.
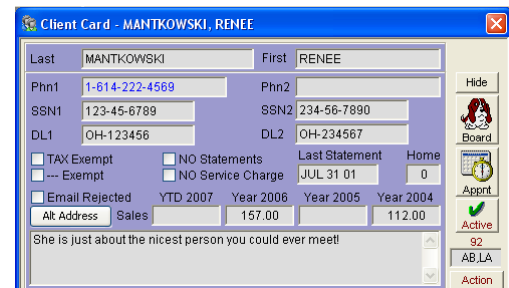
Show Window Data Fields

Phn1	Additional phone number for client.
Phn2	Additional phone number for client.
SSN1	Enter the Social Security number for the client. (Optional.)
SSN2	Enter the Social Security for another household member. (Optional.)
DL1	Enter the Driver's License number for the client. (Optional.)

DL2	Enter the Driver's License number for another household member. (Optional.)
Tax Exempt	Check this box if this client is exempt from all Tax1 taxes.
No Statements	If you place a check in this box, ClienTrax will not generate service charges or print statements for this client.
Last Statement	Displays the last date for which this client had a statement printed by ClienTrax.
Home	If you are using the satellite.ini file as described in Chapter 3: Setup, you may use this field to enter the location number at which this client is typically seen.
Tax 2 Exempt	Check this box if this client is exempt from all Tax2 taxes.
No Service charge	If you place a check in this box, but leave the No Statements box blank, ClienTrax will print monthly statements for the client, but will not add service charges to their account for overdue balances.
E-Mail Rejected	Check this box if you received a notice that the client's E-Mail address is invalid. This will prevent ClienTrax from sending E-Mail information to this customer.
Alt Address [Alt Address]	Some clients may have an alternate billing address that they wish their invoices and statements to be sent to. If this is the case, you can select this button in the Toolbar and you will be presented with a window in which you can enter this address. This address will then print on all Invoices, Receipts, and statements for this client.
SALES YTD 08: (or current year)	The current Year To Date sales total will be displayed.
SALES Year 07: (or last year)	The last year's sales total will be displayed.
Year 06: (or the year before last)	The year before last's sales total will be displayed.
Year 05: (or three years ago)	The total sales from three years ago will be displayed.
Notes:	Enter any notes you wish to include about the client. If you have Active Alerts turned on, notes entered into this field will "pop up" on screen when you access this client.

Boarding

Opens the Boarding Reservations window. ClienTrax will search the Boarding Reservations. If it finds a current reservation for the selected client, the Client Boarding Reservations window will open, showing the reservation for the selected client's animals. If no reservation record was found, the ClienTrax Boarding window will be opened displaying the current week's records.

Appointment

Opens the Appointment Reservations window. When clicked, ClienTrax will search the Appointment records. If it finds a record for the selected Client, the Client Appointments window will open, showing all appointments for the selected client. If no record was found, the New Appointment window will open allowing you to set up a new appointment for the client.

Active

The Active button designates that a client is an active client in your client list. Clicking on the Active button will change it to Inactive, keeping the client's records intact, but removing them from your client list. Clicking on the button again will change it back to Active and put the client back on the client list.

Client Code Field

You can use this field to categorize your clients by type. I.e. AB = Auto Bill, SA = Small Animal, LA = Large Animal. You can use this field to enter in any text to use as a search item in QBEs.

This field can also be used to set a client for a program discount. Using the codes P1, P2 or P3 in the Client Code field, you can instruct ClienTrax to use the Qty Break pricing setup on an Inventory card regardless of the qty charged. (P1 = Break 1 Price, P2 = Break 2 Price and P3 = Break 3 Price) This could be used for a Preferred Customer Program and Senior discounts when you prefer not to use percentage discounting. When setting up your Inventory / Service Card discounts make sure that the Qty Break quantity fields are set higher than 1 or you will be giving these discounts to all users regardless of program status.

Action

Allows you to set the account status for each client. Options are None, Credit OK, Cash Only, and Bad Debt.

Alert!

Clicking the Alert! Button will change the color of the Client Notes field. You have the choice of four different colors (clicking the Alert! Icon cycles the colors) that you can use to represent different situations. What each color means is up to you.

Client Pop Up Note

Clicking on the Client Pop Up Note button will open a window where you can enter a note to pop up when anyone brings up that client's card. OK the note to save it. Once the note is no longer needed, click on the Turn Off button to stop it from popping up.
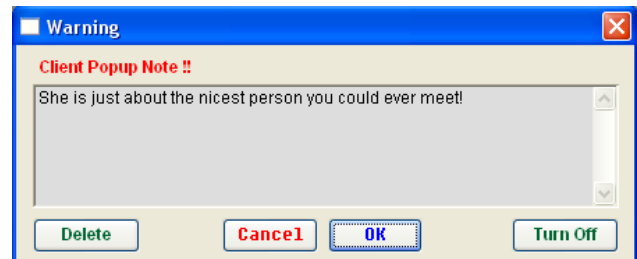
E-Mail

Opens the E-Mail window to send a message to this client. (Assuming you set up the E-Mail options in ClienTrax Setup.)

ClienTrax Messenger

Opens the message history for this client.

Google$_{tm}$ Maps

Opens Google Maps to get directions to this client from the practice address entered in ClienTrax Setup. (You must have the Internet connected to the computer to use this feature.)

New Home

When an animal is transferred from one owner to another, there is no need to reenter the patient information. Click the *New Home* button and a window will open to transfer the patient and its records to the new owner.

Transaction History

The Transaction History window shows you a chronological listing of transactions for the current client. The Transaction History window defaults to the All Items view, showing you the client's entire transaction history in chronological order, including all items entered in the New Visit and Payments windows. But you can also select to view just one category of charges for this client, such as vaccines as shown at the right, by selecting the category you wish to view from the drop menu at the top of the Transaction History window.

Date	Invoice	Patient	Description	Amount	Previous Balance	New Balance
AUG 21 07	4	Duke	Examination Canine	30.00	0.00	30.00
AUG 21 07	4	Duke	Bordetella Vaccination Annual	15.00	30.00	45.00
AUG 21 07		Duke	--Deduct From: Vial, Bordetella	0.00	45.00	45.00
AUG 21 07		Duke	--Deduct From: Syringe 3 Cc W/22x1"	0.00	45.00	45.00
AUG 21 07	4	Duke	Canine Intranasal Ur Vacc	15.00	45.00	60.00
AUG 21 07		Duke	--Deduct From: Vial, Ur Vaccine	0.00	60.00	60.00
AUG 21 07		Duke	--Deduct From: Syringe 3 Cc W/22x1"	0.00	60.00	60.00
AUG 21 07	4	Duke	Dhlp Vaccination Annual	10.00	60.00	70.00
AUG 21 07		Duke	--Deduct From: Vial, Dhlp	0.00	70.00	70.00
AUG 21 07		Duke	--Deduct From: Syringe 3 Cc W/22x1"	0.00	70.00	70.00
AUG 21 07	4	Duke	Parvo Virus Vaccination Annual	12.00	70.00	82.00
AUG 21 07		Duke	--Deduct From: Vial, Parvo	0.00	82.00	82.00
AUG 21 07		Duke	--Deduct From: Syringe 3 Cc W/22x1"	0.00	82.00	82.00
AUG 21 07	4	Duke	Rabies Vaccination Canine 1yr	17.00	82.00	99.00
AUG 21 07		Duke	--Deduct From: Vial, Rabies	0.00	99.00	99.00
AUG 21 07	4	Duke	Heartworm Test Canine Occult	27.00	99.00	126.00
AUG 21 07	4	Duke	Discount	-15.00	126.00	111.00
AUG 21 07			Payment: Visa Aug 21 07	-111.00	111.00	0.00

Recalls

The **Recall** button opens a new window that displays the records of all recall items recorded for the current client's animals. For example, this can be used for surgery follow-up.

Paperless Medical Records

The **Paperless Medical Records** button will open the Medical Records window for the patient currently selected. If you have not selected a patient, you will be reminded to select one before you can open a record.

Rx Label

The Rx label window can be accessed from different places in *ClienTrax*. For example, you may also access the Rx label window from the New Visit window.

The Rx label window allows you to create and print prescription labels. You may set up a code for each different set of directions you use in the practice. You may then select a set of directions when you are printing a label. For example, you may create a set of directions: "Give one half (1/2) tablet four times daily (Every 6 hours) until gone.", and use a code name of 1/2TQID for that set of directions.

To print an Rx label for a patient, you must first edit the Rx label window until you have customized it for the current patient. You may then print one or more copies of the Rx label to your label printer.

Payment

The Payment button opens a new Payment / Credit window. This is the same window you normally see when you are recording a New Visit. It is the window where you record all direct payments and/or credits for clients. You would use this option when the Client did not pay the balance of his account at the time of "New Visit", but instead made payment(s) at a later time. You also would use this option to enter a correction for a payment entered incorrectly.

Invoice History

You can easily view a historical list of any client's invoices. Select a client record as described above, and click on the Inv History button. This will open the Invoice History window for the client. The Invoice History window shows a list of the invoices for the client currently selected. The invoices are shown in chronological order with the earliest one first. The invoice number, date of the visit or transaction, the charges, taxes, service charges and amount due are displayed in a scrollable list format.

Invoice	Date	Charge	Tax	Srv Chrg	Due
755	MAY 14 03	74.23	4.04	0.00	0.00
756	MAY 14 03	13.99	0.00	0.00	0.00
765	JUN 30 03	2.00	0	2.00	0.00
833	SEP 12 03	112.00	0.00	0.00	0.00
834	OCT 20 03	200.00	0.00	0.00	0.00
842	MAR 8 04	112.00	0.00	0.00	0.00
844	JUL 21 04	100.00	0.00	0.00	0.00
849	SEP 10 04	80.00	0.00	0.00	0.00
855	DEC 8 04	112.00	0.00	0.00	0.00

Invoice Window

The Invoice window allows you to view invoices that you have created in the New Visit window. To open the Invoice window, double click on any invoice in the Invoice History List.

Referral

You can track your referrals from each client. Your practices may wish to do this for a number of reasons. You may decide to reward your clients with a discount for referrals. You may wish to send referring clients a card or letter to thank them for the new business.

After inserting a new client, open the Referral window and enter the account number of the client who referred the new client to the practice in the By: field.

Attachments

Opens the Attachments window where you can see a list of files (i.e. correspondence documents) attached to this client. This is also where you would maintain that list such as adding new attachments and editing or deleting current attachments.

New Visit

Opens the New Visit window where you can enter new invoices for the currently selected client. See the New Visit section later in this document for more information.

Held List

This option displays the Held Items List, which shows all clients who have items currently being held in New Visit invoices.

This list should be run periodically to insure that you do not lose track of visits that should be closed and invoiced.

You can use the Delete (Trash Can – F7) button on the toolbar to delete a selected entry if you wish.

Query Window

Opens the Custom QBE query window, where you format QBE searches on multiple data files. This function allows you to do almost limitless search types on your files. It is the perfect tool for target mailings, mail merge documents, custom reminders and much more.

Chk Price   **Check Price**

Opens the Check Price window where you can select an item or service to check the price before putting it on an invoice.

Jpdt Patient L   **Update Patient List**

In the event that the patient list for a client seems to be displaying the wrong patients (either they're not listed, someone else's patients are listed, or blank lines are listed), you can select this utility, and ClienTrax will rebuild the list displaying all patient records currently associated with the current client.

Calc Balances   **Calc Balances**

This utility calculates the Client Card accounts receivable balance fields to conform to the invoices listed in the Invoice History list. This function is useful in the event of a computer crash where the Client Card balances were not updated properly.

ClienTrax Messenger

The ClienTrax Messenger button on the tool bar opens the Messenger window to check messages from other users, select users to send messages to, and look up message histories.

E-Mail

The E-Mail button on the tool bar opens the blank e-mail window to send e-mail messages.

Calendar

The Calendar button on the tool bar opens the Calendar window.

Special Client Card: OTC

If you sell products "over the counter" to people you do not want to include in your list of clients, or do cash payments from your cash drawer, you need to *insert* a new client card to handle these. This new Client Card should have a last name of OTC and one patient entered with the name of OTC and a species of OTC (this will help you identify OTC transactions on the Practice Statistics report.

Some practices have many "walk in" customers and find that the OTC client's record soon grows large. For these practices, we recommend that at the end of each month you *Edit* the OTC client card and change the last name to (name of the month/year)-OTC (e.g. "May/99-OTC" and *insert* a new OTC client card to be used during the next month.)

Patient Card

The Patient Card includes all the basic information ClienTrax needs to help you track and communicate with your Clients and Patients. Like the Client Card, it also includes a free form notes field where you can store any type of information needed for each patient. You may also notice that we have tried to keep the buttons for functions that have the same operation (i.e. the Rx Label button) on each window in the same position. This should help you learn the program faster and make you more efficient.
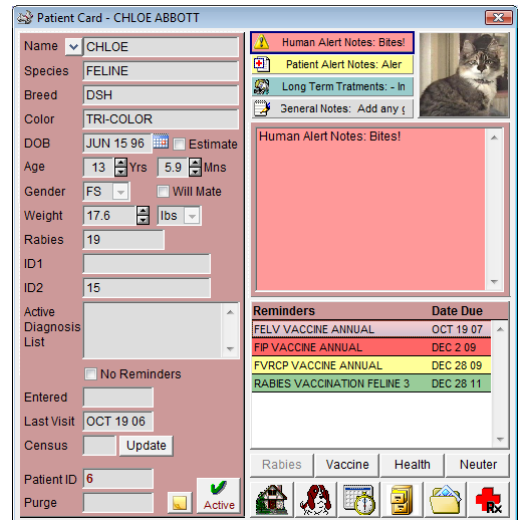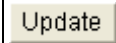
Getting Started with the Patient Card

After you insert a new client, you will be asked if you wish to enter a new patient record. In most cases you will answer yes. At that time, the Patient Card will open, ready for you to enter information. If you wish to enter a patient on an already existing Client Card, or if you wish to review patient information, you will need to open the Patient Card by double clicking the Patient List on the Client Card. If there are no patients in the list, just double click anywhere in the Patient List field.

Patient Card Fields

| Name	Enter the name of the animal. (You may use any combination of letters, numbers and spaces.)
Species	Enter the name of the species. This can be done by selecting it from the List Window or by typing it in. If you type a species that is not on the list, you will be asked whether or not you wish to add that species to the list.
Breed	Enter the breed. This can be done by selecting it from the List Window or by typing it in. If you type a breed that is not on the list, you will be asked whether or not you wish to add that breed to the list.
Color	Enter the color of the animal. This can be done by selecting it from the List Window or by typing it in. If you type a color that is not on the list, you will be asked whether or not you wish to add that color to the list.
DOB (Date of Birth)	Enter the date of birth for this patient. For February 1, 2000, you may type "020100", "2/1/00" or "Feb 1 00". ClienTrax will then calculate the patient's age. You may also click the calendar button next to the DOB field to select the patient's date of birth.
Estimate	Check this box if the date of birth is calculated by estimating and entering the age to identify that this patient does not have a verified date of birth.
Age – Yrs, Mns	You can enter the approximate age of the patient and ClienTrax will calculate the DOB for you. If the patient is less than six months old, the date will be displayed as Weeks and Days instead of Years and Months.
Gender	Enter the Gender for the patient. You have several choices you can enter for gender: MI = Male Intact, MN = Male Neutered, FI = Female Intact, FS = Female Spayed, G = Gelding.
Will Mate:	Check this box if the owner wishes to breed this animal.

Weight	Enter the weight of the patient. The weight is specified in units of lbs. (Pounds), kg (kilograms), or g (grams) as set up in the species record.
Rabies	The rabies tag number is automatically entered when you perform a rabies vaccination procedure.
ID1:	The ID1 field can be used as an alternative index field for use in your practice. This means that you can search on this field with the find function and be able to bring up the record you're looking for instantly. Many practices use this field to store Electronic ID or Tattoo information.
ID2:	The ID2 field can be used as an alternative index field for use in your practice. This means that you can search on this field with the find function and be able to bring up the record you're looking for instantly. Many practices use this field to store Electronic ID or Tattoo information.
Active Diagnosis List	This field displays a list of all active diagnoses for this patient. Double Click a diagnosis to open the Medical Record window with the last record for the selected diagnosis.
No Reminders	Check this box if you wish to keep this patient active, but do not want reminders to be printed for this patient.
Entered	The date the current patient record was entered into the database.
Last Visit	This field displays the date of the most recent visit by this patient, as determined by the date when a New Visit was recorded for that patient.
Census	Displays the current census status for this patient.
Update	Opens the Edit Census window so that you can change the status of the patient's census record. See Chapter 10: Appointments for more information on this function.
Purge (Purge Date)	*ClienTrax* has a purge feature, which removes all records for inactive patients. These may be patients who haven't been in for a long time or patients who are deceased. You may enter or change dates in this field as you wish. For example, when you know that the patient will no longer be coming to see you. We suggest you enter today's date. **Note:** If you enter a New Visit and record an inventory item or service with the Purge New Visit Flag set, *ClienTrax* will automatically put today's date into the patient's purge date field. *ClienTrax* will NOT send any reminder to any patient with a date in the purge date field! You may purge patients from the records whenever you choose. (For example, on June 1, 1999, you could purge patients with a date earlier than 6/6/96.) **Note:** The Patients age stops updating from the date entered in the Purge Date field.

(NOTES Field)	On the right side of the patient record window is a large field for notes. When you are in *Insert* or *Edit* mode, you may enter notes on the patient. These are separate from the notes in the client record. The notes field is separated into four classes of Patient Alerts and Notes identified by four different colors. Red - Behavior Alert – Alert for problems / dangers in behavior related areas. (Aggression, etc.) Yellow - Medical Alert – Alert for patient medical problems (Allergies, Conditions, etc). Green - Procedure Alert – Notes on procedures to be performed or quick look-up notification for ongoing/lifetime treatments. Grey - General Notes – Anything additional notes for this patient. To select type of alert or note, click on the color bar above the notes field. The notes field will then change to that color. Select Edit (**E** – F6) to enter/change notes in this class, then click OK or press <Enter> to save. If notes are entered into only one class for a patient, the notes field will default to that color and the patient name will be displayed in that note color on the Client Card. If more than one class of notes are entered on a patient, the highest color will be selected for display. If notes are entered in a class area, the color bar on the patient card will display the beginning text of the notes. If no notes are entered, the color bar will display (Empty).

(Patient Picture)

The Patient Picture button is the square in the upper right corner of the Patient Card that either displays "No Picture" if no picture has yet been entered for this patient, or displays a thumb nail preview of the current patient picture. Clicking on the Patient Picture button opens the **Patient Picture** window where you can store a photo of the patient. This photo can then be optionally printed on various reports and client communications. To store a picture, follow the steps below.

1.) Take a picture of the patient and save it to your hard drive.

2.) In *ClienTrax*, find the patient and open the Patient Picture window by clicking the Patient Picture button.

3.) Click the Insert (**I** – F5) button. You will be prompted to select the picture. Find the picture you saved to your hard drive, select it and click the open button. This will place the picture into the window and save a copy of it in the *ClienTrax* pictures folder.

4.) You have now saved the patient picture. You can now delete the original picture you saved to your hard drive whenever you like.
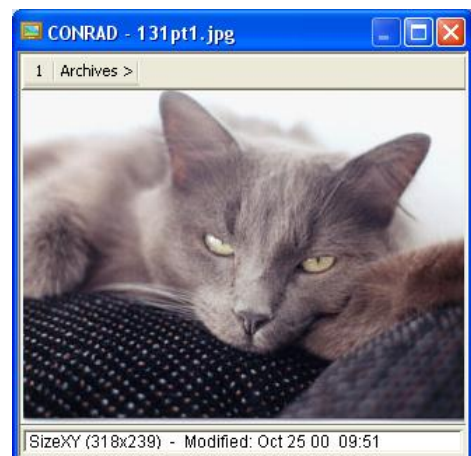
 Active

      Allows you to select the current patient as Inactive or back to Active again. If a patient is marked as Inactive, reminders and recalls will not be printed for them.

New Home

Opens the New Home window where you can move the current patient to another Client Account. (See Chapter 6: Client Card for more information on this option.)

Boarding

Opens the Boarding Reservations window displaying the current week's records. See chapter 12 for more information on the Boarding Module.

Appointments

Opens the Appointment Reservations window. When clicked, *ClienTrax* will search the Appointment records. If it finds a record for the selected Client, the Client Appointments window will open, showing all appointments for the selected client. If no record was found, the New Appointment window will open allowing you to set up a new appointment for the client. The Open Appointments button on the tool bar can be selected to have this window display only appointments that have not been checked in. The All Appointments button can be selected to have this window display the entire appointment history for the client. See Chapter 10 for more information on the Appointments Module.

Patient History

Opens the **Patient History** window that lists all transactions applied to the current patient.

We have already discussed the C*lient History* button and window. There is also a *Patient History* button and window. The patient history window, which includes a list of the procedures / inventory items for the patient, should not be confused with the Medical Record, which includes medical records typed in separately.

The **History** button opens the Patient History window. The Patient History window shows a list of all transactions for the patient currently selected. The history defaults to the procedures being shown in chronological order with the earliest procedure first. The date of the procedure or transaction and the description are displayed in a scrollable list format.

As in the Client Transaction History, the Patient Transaction History window defaults to the All Items view, showing you the patient's entire transaction history in chronological order, but you can also select to view just one category of charges for this patient, such as vaccines, by selecting the category you wish to view from the drop menu at the top of the Transaction History window.

WARNING – You should not make any changes to transactions from this window. This access is provided for recovery from certain types of computer failures. It can cause your account balances to be incorrect if not handled correctly.

Medical Record

The **Medical Records** button on the Patient Card opens the (Patient) Medical Records window exactly the same way as the Medical Records button on the Client Card. The medical Record can store unlimited numbers of pictures of diagnostic data such as x-rays and EKG's. For instructions on use of the Medical Records window, see Chapter 11: Medical Records.

Rx Label

Opens the **Rx Label** window where you can enter a prescription item for the patient and print an Rx Label. See Chapter 6: Client Card in the ClienTrax User's Manual for more information on this window.

Patient Card Reports

If you select the Print Button when you have an open Patient Card, ClienTrax will display a pop up window from which you can select from among many patient related reports. A few examples are Patient Card, Reminder List, Patient History, File, Cage, ID and Mailing Labels and many more.

Reminder Reminder

Opens the Edit Reminder window from which you edit and insert reminders for the patient. This is usually used to enter reminders from a prior clinic.

Edit Reminder Window

Once you have opened a patient record, the selection of buttons in the toolbar changes. Among the buttons available is *Reminder*. You may use the Edit Reminder window to enter a manual reminder for the patient. This is especially useful when you are setting up an existing practice on *ClienTrax* and you want to enter all of the existing reminder procedures for your clients. Reminder procedures are items from the inventory for which you have entered an expiration term. Reminders will automatically insert for inventory items previously set up with reminder terms. i.e. Rabies vaccinations.

Inserting Reminders

Click the **Reminder** button to open the Edit Reminder window.

The reminder window will appear for the currently selected patient. Click the Insert (**I** – F5) button to insert a new reminder item for this patient. Enter the inventory item number for the item you wish to insert. Then press the TAB key to move to the next field. The item description will appear on the screen.

Today's date appears for the DATE GIVEN field. You may change this date if you wish.

NOTE: If you are entering a reminder item for a procedure performed at another practice, you should clear the DATE GIVEN field. This will prevent this reminder item from showing on a vaccination or Health Certificate as if it had been performed at your practice.

Press the TAB key to move to the next field.

If you put a date in the DATE GIVEN field, the DATE DUE field will display a date in the future. The DATE DUE will depend on the EXPIRATION TERM defined for that inventory item in the inventory record. For example, if you are inserting an inventory item with a twelve-month EXPIRATION TERM, the DATE DUE will be twelve months (one year) from the date in the DATE GIVEN field. If on the other hand, you cleared the Date GIVEN field, you will need to enter the DATE DUE date manually.

When you are finished, click the **OK** button or press <Enter>. If you wish to quit without saving this reminder, click the **Cancel** button.

Recall Recall

Opens a new Recall record for the current patient. Select how many days from now you would like the recall to appear on the Recall List and a description of what information needs to be obtained. You can also select the provider who needs the information from the drop down list at the upper right. Click **OK** or press <Enter> to save the record.

Rx History   **Rx History**

Opens the patient's prescription history where you can view past prescriptions, refill prescriptions, or reprint prescription labels.

Attachments   **Attachments**

Opens the Attachments window where you can see a list of files (i.e. correspondence documents) attached to this patient. This is also where you would maintain that list such as adding new attachments and editing or deleting current attachments.

New Visit   **New Visit**

Opens the New Visit window where you can enter new invoices for the currently selected patient.
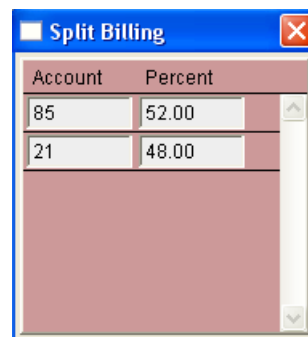
Boarding   **Boarding**

Opens a window to enter boarding activities (feeding schedule, grooming, training, treatments) to be done while the animal is being boarded.

Splits   **Splits**

Opens the Split Billing window. This window is used to define what owners are to be billed for items and services performed on this patient. It must be noted that if this option is used, the animal should not be entered into one of its owner accounts, but instead on what we refer to as its Location account. For instance; the stable where a horse is boarded.

The owner accounts will need to be listed as separate accounts in ClienTrax. You will then list the account number of each owner in the Account field as shown to the right and the percentage of ownership (or billing percentage) as required. To do this, open the Split Billing window from the Patient Card, click **E** (Edit) and enter all the owners and their percentages. When you are finished, the total percent should add up to 100.

When an Invoice is generated for the patient, a separate invoice will be generated for each owner account referencing the services provided.

Pre Rabies   **Rabies Certificate**

Opens a window where you can enter Rabies Tag information and print a Rabies Certificate without actually invoicing the client or changing the current patient information.

Merge   **Merge Patient**

Opens a window to merge two patient cards entered on the same client for the same patient.

Ctrl Log   **Controlled Log**

Opens the patient's controlled substance log history where you can view controlled substances administered to this patient and correct log entries if entered in error.

Certificates

In *ClienTrax* you can print several types of certificates for your patients. Below is an explanation of each report.

Rabies **Rabies Certificate**

The **Rabies Certificate** option will print a Rabies Vaccination certificate for the selected vaccination from the reminder list on the Patient Card. You should select the Rabies Vaccination reminder in the list before selecting this option. The Rabies Certificate includes the basic information on the patient, the rabies tag number, the rabies vaccine vial serial number, and a statement certifying the vaccination of the animal and the veterinarian's name and license number and space for a signature.

If you have more than one veterinarian defined in the provider list, you will be prompted to select the provider's name to be printed on the certificate.

Vaccine **Vaccine Certificate**

The **Vaccination Certificate** option will print the Vaccination Certificate for all the vaccinations from the reminder list on the Patient Card. The Vaccination Certificate includes the basic information on the patient, the rabies tag number, the rabies vaccine vial serial number, and a statement certifying the vaccination of the animal and the veterinarian's name and license number and space for a signature.

If you have more than one veterinarian defined in the provider list, you will be prompted to select the provider's name to be printed on the certificate.

Health **Health Certificate**

The **Health Certificate** option will print a health certificate for the current patient. The Health Certificate includes the basic information on the patient, the procedures (vaccination reminders), a statement certifying the health of the animal, the veterinarian's name and license number, and space for a signature.

If you have more than one veterinarian defined in the provider list, you will be prompted to select the provider's name to be printed on the certificate.

Neuter **Neuter / Spay Certificate**

The **Neuter Certificate** option will print a neuter certificate for the patient currently selected. The Neuter Certificate includes the basic information on the patient, the procedures (vaccination reminders), a statement certifying the neutered status and health of the animal, the veterinarian's name and license number and space for a signature.

If you have more than one veterinarian defined in the provider list, you will be prompted to select the provider's name to be printed on the certificate.

NEW VISIT (Invoicing)

The **New Visit** window is the heart of the ClienTrax Accounts Receivable module. From this window you will create and apply all client invoices, store service history, create reminders, make payments, etc. Invoice entries can be started and then placed on "Hold" for later additions and / or changes. You can also print and store estimates from this section as well. The stored estimates can then be used as the basis for a later invoice if the client decides to go with the recommended services.

ClienTrax supports many methods of entering item numbers into your New Visit screen. Of course you can type them in from the keyboard. You can also select them from the Inventory / Services list, which can be sorted to find your items by number or description.

Another method that some practices find very useful is using a bar code scanner. Ask your ClienTrax sales representative about this option.

Opening a New Visit

The Computer Operator Window

To enter the New Visit window, you will first need to open a Client Card or Patient Card on your screen. Then from the Toolbar, select the **New Visit** button. This will open the operator selection window. Enter your password in this window. This does not have to be the same password that was used to start ClienTrax. The password entered here will reflect that person as being the CO (computer operator) for the following transactions. Press <Enter> or click the OK button to continue or <Esc> / Cancel to cancel to return to the previous screen.
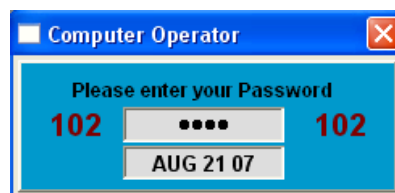
The Held Items Window

Next, if you have any held invoices or estimates, you will be presented with a list from which you may select from the saved entries.

Each entry in this window shows you a short description of what the entry is, the date it was created, and the total price of all the items included in the entry.
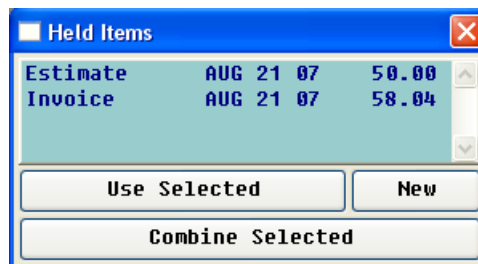
From this window you can select to work with one or more of the held entries or click the **New** button to open a new entry. To work with more than one entry at the same time, select the entries you want (by holding down the <Ctrl> key, you can select multiple lines) then press the **Combine Selected** button. The invoices will be combined into one entry and opened in the New Visit window. To open just one entry, select it in the list and click the **Use Selected** button.

If, on the other hand, there were no held invoices, you will be brought immediately to the New Visit window.

The New Visit Window

New Visit Window Fields

ITEM:	Enter the item number by clicking on an item in the Inventory / Services list, or by typing in an Item Number. When the cursor enters this field, the Inventory / Services list will sort by Item Number. The following fields will automatically be filled in, but may be changed as needed.
QTY:	The default quantity of 1 will automatically appear. You may adjust it as required.
EACH:	The price from the record of the appropriate inventory item will automatically appear. You may *Tab* to the field and change the price if you wish.
CO: (Computer Operator)	This field displays the current computer operator. This is determined by the password entered when the New Visit window was opened.
DESC: (Description)	There are two modes of operation for this field. The default is that the description field has no effect on any other field. You can change the description, but no inventory searches will be performed when you change the field. If you have chosen the **NV Descr Search** option in setup, this field will be treated as a search field just like the Item field. When you enter the field, the Inventory / Services list will sort by description. Then as you type in the field, ClienTrax will automatically find the closest matched record to what you are typing, and display its information on the New Visit Window. The disadvantage of this method is that you cannot change the description of an item in the inventory.

DISCOUNT:	In this field you may enter a percent discount you would like to apply to the current item. The discount will apply for this item only. (Setting the discount to .01 will charge the client at cost instead of the retail price.)
Tax Fields	Normally, the Tax fields will be filled in as required because the item had been set in the Inventory Card as Taxable or not. If you wish to change the default, click the appropriate field, ClienTrax will charge the appropriate amount of tax for items with a checkmark in the checkbox.
PR: (Provider)	This field shows the provider's initials. You may change these initials to those of any operator recorded as a provider in the setup section. This field may be changed for each item on the New Visit window. The initials in this field determine which provider gets credit for these services in the various ClienTrax reports. This can be very important in some practices!
PR DATE:	Normally this field will display the current date. You can change it to reflect the date the service was actually given if you wish.
L Qty (Low Quantity)/ Each	If you are creating an estimate where the quantity and/or price of an item may vary, enter the low-end quantity and/or price in these fields.
H Qty (High Quantity)/ Each	If you are creating an estimate where the quantity and/or price of an item may vary, enter the high-end quantity and/or price in these fields.
Invoice Date	The date the invoice will be recorded if it is totaled at this time.
Weight	The weight of the currently highlighted patient, used for reference in dosages.
Patient List	The Patient List field is a scrollable list field that displays all the patients for the current client. You assign items to a patient by selecting the patient in the list before pressing enter to save the item into the Item List. You can also select more than one patient by highlighting each patient that should receive the service (hold the <Ctrl> key down and select with your mouse). When you press enter, a line for the service will be displayed for each patient selected.
Item List	This scrollable field displays the patient name, the date the item/service was provided, provider, the description for the inventory item, the quantity, and price for each item entry in the invoice.
Balance Forward:	This field displays the balance forwarded from previous visits by this client.
This Sale:	This field displays the total for the current visit.
Sales Tax:	This field displays the tax total charged for taxable items for the current visit.
This Visit:	This field displays the total charges plus total tax for the current visit.
New Balance:	This field displays what the total client balance will be when the current New Visit is processed.

New Visit Window Buttons

Show Estimate   **Show Estimate**

The **Show Estimate** button changes the New Visit window from Invoice View to Estimate View. Estimate View shows the quantity and price range columns (values entered into the **green** edit fields). When in Estimate View, the Show Estimate button is replaced by the Hide Estimate button. Click on Hide Estimate to go back to Invoice View (showing a single quantity and single price column with the values as entered in the **grey** edit fields).

Delete F7   **Delete F7**

The **Delete** button will delete an item you have posted in the Item List. Just select the item already inserted in the invoice, and click the Delete button or press the F7 key.

Return   **Return**

The **Return** button will mark an item you are currently entering as a return. You may record an item returned by the client and enter any quantity you wish. To enter it into the invoice, choose the inventory item and instead of pressing OK, press the Return button. The quantity and amount of the purchase will appear as a credit (a negative number.)

Total F5   **Total F5**

When you are finished entering inventory items or services, including returns, you should click on the **Total** button, or press F5. You will then see the Payments / Credits window, where you can finish the transaction.

Note: If no payments are taken at the time you total the New Visit, do not make any entry in the Payment window. Instead, simply click OK or press the <Enter> key and your Invoice will be saved as a balance due on the client's account.

Hold F6   **Hold F6**

If you wish to hold this New Visit for a hospitalized patient, or for others in the practice to add items at a later time, click the **Hold F6** button, or press F6. The next time you choose New Visit from the Client or Patient Card, this Invoice will appear on the Held Items list.

Hold Ready   **Hold Ready**

Same as the Hold F6 button above except that the Invoice is marked as "Ready" in the Held Invoices List. You can use this option to alert the people at the Front Desk that a client's invoice is ready for check out.

Print Std   **Print Standard**

If you wish to print this New Visit screen for a client as an estimate with single quantity and price columns as entered in the grey edit fields, when you are finished selecting inventory items and services, click the **Print Std** button, and the estimate will print. Estimates are not saved in ClienTrax <u>unless</u> you then choose **Hold Estimate** (See *Hold Estimate Button* section below).

Print Rng   **Print Range**

Prints the same estimate report as the Print Std command, but prints the additional columns for the quantity and price ranges as entered in the green edit fields. Estimates are not saved in ClienTrax <u>unless</u> you then choose **Hold Estimate** (See *Hold Estimate Button* section below).

Hold Estimate   Hold Estimate

If you wish to hold this New Visit as an estimate, click the **Hold Estimate** button. The next time you choose New Visit from the Client or Patient Card, this estimate will appear on the Held Items list.

Rx

If you have a prescription item selected in the Item List, you can click the **Rx** button to open the Rx Label Window to print Rx Labels. The information from the selected item will already be entered for you. Just make any necessary changes and print the label(s).

Toolbar Buttons

Invc Note   **Invoice Note**

The **Invoice Note** button on the toolbar near the top of the window will allow you to add your own notes for the current visit to be printed on the client receipt. Select **Invc Note,** and type your notes into the field in the middle of the New Visit window. When you are finished typing the note, <Tab> or click the OK button in the upper right corner of the window. These notes will print at the bottom of the receipt or on a second page (determined by space left at the bottom of the receipt after all items are entered). Then continue entering more items or select total (F5).

Trans Note   **Transaction Note**

The **Trans Note** button on the toolbar near the top of the window will allow you to add your own notes for the current visit to be printed on the client receipt. Select **Trans Note,** and type your notes into the field in the middle of the New Visit window. When you are finished typing the note, <Tab> or click the OK button in the upper right corner of the window. These notes will print directly below the item that you enter them for. Then continue entering more items or select total (F5).

Recall   **Recall**

This opens the Insert Recall window where you can enter a recall record to call a client to check up on their animal, remind them to set an appointment, give them lab results, etc.

Handouts   **Handouts**

Opens the Lifelearn Client Handouts window so that you may select handouts to print with the receipt for this client.

Boarding   **Boarding**

This function checks the boarding records and, if it finds any for the current client, gives you the opportunity to add the charges for those records to the current New Visit. Normally *ClienTrax* checks this for you automatically. This option gives you the ability to add the boarding charges later if you choose not to when you started the New Visit.

Duplicate   **Duplicate**

Saves a copy of the current charges as an Estimate so that you may continue working to build another estimate based on the original charges while still having the original set of charges available for comparison.

Entering a New Visit Step by Step

1.) Open a Client Card for the client to whom you wish to charge Items and Services.

2.) Click on the patient's name in the patient list section of the client card to highlight the patient for whom you will be entering charges.

3.) Click the **New Visit** button on the toolbar (upper right of the screen).

4.) Enter your operator password in the Operator Window. Press <Enter> or click OK. (If you have not yet entered any operator records with passwords, you can just press <Enter> or click OK without entering a password.)

5.) If there are Held Invoices, the Held Items window will open. Select from the Held invoices or click New to start a new one.

6.) The New Visit Window will open. Select the first item you wish to charge. (See the field description earlier in this manual for more information on each field.)

7.) If you wish to change information in any of the fields for this inventory item, use the *Tab* key to move from field to field. Type changes in each field as necessary. You may also click on any field with the mouse and make changes as necessary. In the scrollable patient list, you may use the up and down arrow keys or the mouse to select the patient for each inventory item or service if desired. (**Note:** If you do not select a patient, the charge will be charged to the clients account, but will not show in any patient's history.) If appropriate in your practice, be sure to enter the correct initials in the PR field to credit the correct provider!

8.) When finished (unless this is a return), press <Enter> or click OK to post the item(s) into the Items List.

9.) If you wish to mark the current inventory item or service as a return (i.e.: a credit), click the **Return** button. The inventory item will appear in the posted list with a negative quantity and negative dollar amount (a credit).

10.) If you wish to make any changes to the inventory item or service after the item has been posted, select the item in the list. The information will be placed back in the New Visit fields. Make your changes and press <Enter> or click OK.

11.) Repeat steps 5 though 9 as required posting any other items into the Items List.

12.) When you are finished selecting and posting all items, Total or Hold the invoice as described above. See The Payment / Credit Window below for how to apply payment to this invoice.

The Payment / Credit Window

When you Total the New Visit as described above, the first thing that happens is the Payment / Credit Window (shown right) opens.

From this window you can enter any payments that the client is making at the time you are entering this invoice.

You can enter multiple payments (as many as you like) into the window. They will be displayed and totaled at the bottom of the window. (I.e.: the client Pays $50.00 in cash and the balance on a check.)

Payment / Credit Window Fields

Payment Type	Select which method of payment the client is paying with. If you select check, the check number field and the NSF checkbox will be displayed for entry.
Current Sale:	The amount from the current New Visit screen.
Prior Balance:	This field displays the amount of the prior balance, if any.
Tendered Amount:	Type in the amount of money tendered by the client. For example, if they hand you $100, enter $100.00 as the amount tendered, even if the invoice is for $95. *ClienTrax* will calculate the change due back to the client.
Payment Amount:	Type in the amount to apply to the bill if it is different from the tendered amount. This will usually be the same as the amount tendered in the case of checks or credit cards. **Note:** If you are giving the Client a credit balance (they are paid ahead), you must make sure that this field is filled out correctly or the amount will be shown as being returned to the client as change instead of as a negative balance on the Client Card.
Check Number:	Enter the client's check number. * It is mandatory that this field be entered if you are making a check payment.
Date to Post:	Today's date is automatically displayed. You may edit this field to change the date. However, if you are using *ClienTrax* accounting, do not attempt to enter past dates for months that have already been closed. If you enter a future date on a check payment, a Held Check record will be created to remind you to post the check on the day it comes due (the date entered in Date to Post).
NSF Check	Click on the NSF Check box if you have received a non-sufficient funds check from the bank and need to void the payment from the Client's account. Enter the original check amount as the payment, but enter it as a negative number.
Post First	There are two options for this entry. Balance – Designates that the payments will be applied to the oldest balance first. This means that older invoices will be credited before the current invoice. This is the default method and should not be changed under normal circumstances. Current – Designates that the current invoice will be paid first, then the older invoices. This is usually only selected for returns when you are giving money back to the client.
Print	This checkbox is automatically checked if you are processing a New Visit. If you do not want a printed copy of the receipt for this New Visit or payment entry, you may click on it to un-check it.
Tendered	This field displays the total amount tendered.
Payments	This field displays the total of payment(s) received.
Change	This field displays the change due the customer.
Balance	This field displays the current balance due.

Entering Payments / Credits Step by Step

Here are the actual steps to follow for posting payments or credits:

1.) Once the Payment window is open (by clicking Total in New Visit or Payment from the Client Card), use the mouse to click on the form of payment you wish to accept. If the client plans to pay partly with one form of payment and partly with another form of payment, enter the first form here and then repeat the steps for the other forms of payment. If you select credit, indicating that you will be giving the client a credit for an amount, you will be prompted to enter a reason for the credit.

Note: Coupons are handled the same as Credits, the only difference is that they are totaled separately in your daily reports.

Note: If you are processing a New Visit and no payments are taken at the time you total the New Visit, do not make any entry in the Payment window. Instead simply click OK or press the <Enter> key and your invoice will be saved as a balance due on the client's account.

2.) Press *Tab* or click to the tendered amount field. Type in the amount paid by the client. If an amount is an even dollar amount, you may type just the dollar amount. If an amount includes cents, enter the dollar amount, a period, and the cents.

3.) The payment amount field will display an amount that will be credited to the client's account. You may change this amount by pressing *Tab* or clicking on the payment amount field. Enter the payment amount. For example, the client gives you a $20 bill, the current sale is $15.00 and this client has no prior balance. The payment amount will automatically display $15.00. However, the client has asked you to apply only $10.00 to the bill and return $10.00 change. In this case, you would enter $10.00 in the payment amount field. In another example, if the client would like the change posted to his account for future sales, change the payment amount to $20.00 and a negative balance will appear.

4.) If you select check, you must type in a check number or a name, press *Tab* or click on this field and type in the number or the name. (This field is only available if you select Check as the payment method.)

5.) Post balance or current first buttons. The default choice is balance first. If you wish to apply this Payment / Credit to the current transaction first, click on the *Current* button.

6.) The print box is automatically checked. If you do not want a printed copy, click the print box to remove the checkmark.

7.) If you wish to change the date to Post, press *Tab* or click on this field and type in a different date. Once you *Tab* past this field, the amount and method of the payment, or the amount and reason for the credit will be posted in the scrollable display field near the bottom of the Payment / Credit window. If you have posted an item you wish to remove, you must select the item and click on the Trash Can on the tool bar. To correct an item posted, select it from the bottom portion of your screen and with the mouse, highlight the field that is incorrect, then make the change.

8.) Press <Enter> or click OK to finish the process. A dialog box will display: "Payments totaling $X.XX will be applied. Change Due is $X.XX. Is this correct? No Yes " Click on **Yes** or press <Enter> to accept this amount. The client's receipt will be printed, unless you have de-selected the print feature. Click on **No** or press <Esc> to return to the Payment / Credit window without applying the amount.

Post Dated Checks

ClienTrax will allow you to accept post-dated checks. This, of course, is not a recommended practice, but if you wish to enter a post dated check, simply change the Date to Post field on the payment window when you enter the check.

Returns

If a client is unhappy with any item or service, you may record a return for that item. To do this, you will create a new invoice using the same steps as above when doing a New Visit. Accountants call this creating a Credit Memo.

Follow the procedures for returned inventory items or services as described previously, in the section: Entering a New Visit, (see especially Step 8). When you are finished recording the return in the New Visit window, the client will have a credit (negative) balance.

Once you have entered a returned item from a client, ClienTrax will open the Payment / Credit window. If you wish, you could leave the credit balance on the client's record, then, the next time they come in, they will have a credit balance. If this is the case, click OK to close the Payments / Credit window without entering any payments.

If you prefer, you can instead give a refund back to the client. This will remove the credit balance from their record. In this case, follow the steps described below in the section Refunds to Clients.

Refunds to Clients

Use the Payments / Credits window to give a refund to a client's account. Follow these steps:

1.) If the Payments / Credits window is not already open, click on the **Payment** button to open it. (If a return of merchandise is involved, start this process from the New Visit window).

2.) Follow the steps above for the Payment / Credit window by selecting the proper method of payment (if you are going to give them cash from the Cash Drawer, select Cash, if you are going to credit their VISA Card, select VISA, etc.), with the following exception: If you are going to write a check to refund the client's money, click the **Credit** button. Do **NOT** click the Check button. (If you are using ClienTrax accounting function, you will need to use the checkbook program to record a check to the client.)

3.) Tab to the tendered amount field and type a <u>negative</u> amount for the amount you are going to return to the client. Example: -10.50

4.) In the **Post First** box, the setting should be set to **Current**. If not, click the **Current** button to apply the refund credit against the current balance.

5.) Verify that the client's balance is appropriate at the end of this transaction. If not, highlight the item to be corrected with the mouse and correct it.

6.) Click OK or press <Enter> to accept the payment total.

Note: If a client writes a check, then immediately returns an item and is going to write another check for the new amount, you should return the first check as above, and then process the new check as part of the return.

Applying a Credit to the Client Balance

For some reason, as a good will gesture for example, you may decide to give a client a credit toward future business with you. To record the credit in *ClienTrax*, follow the steps described above in the section <u>Refunds to Clients</u>. When you reach Step 2, click the **Credit** button and in Step 3, enter a <u>positive</u> amount. Then follow the remaining steps as described above.

INVENTORY / SERVICES

You can use the *ClienTrax* Inventory / Services application to track any item the practice sells or dispenses and any services performed. Each item, whether an antibiotic or a bag of pet food, has a wholesale cost (what the practice buys it for) and a set retail price (what the practice sells it for). Each item should be assigned a cost based on what the practice pays for it. If you are not using the ClienTrax Accounting module, you could also assign a cost to Service Items. For services, overhead costs should be accurately figured to determine what it costs your practice to perform that service. This will allow you to price your services in an accurate and fair manner (to meet your profit margin goals), rather than basing service prices on guesswork. If you are using the ClienTrax Accounting Module, you should leave the cost field on all service items as zero. In this case, your service costs will be calculated from your payroll and other expense entries.

The Inventory Scroll List

The inventory scroll list is how you access information about the items currently in the inventory. It is opened by selecting Inventory / Services from the Main Menu. Double clicking on a line in this list will open a related data window to review, edit or add inventory items.   The screen displays different lists depending on the button selected under the list.

Item No Button - This button displays all inventory items by item number.

Description Button - This button displays all inventory items by description in alphabetical order.

Categories Button - This button, opens the Categories scroll list, showing all the categories currently entered in your inventory setup.

Buy Card Button - Select this button to open the buy card, which displays purchase history for the related item.

Note: you will only see detailed purchase information if you are using Purchase Orders in ClienTrax to buy from your Vendors.
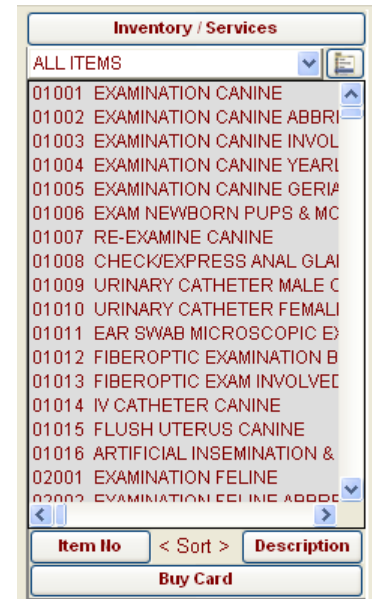
Inventory / Service Items

This window (shown right) is used to display all the details associated with the inventory and service items list. The Inventory / Service Items window is opened by double clicking on any item shown in the Inventory / Service List.

The buttons on the right side of the window will open other fields and tables for more information as designated by their title. If information has been entered in its area, the button will appear a light yellow in color instead of the default color.
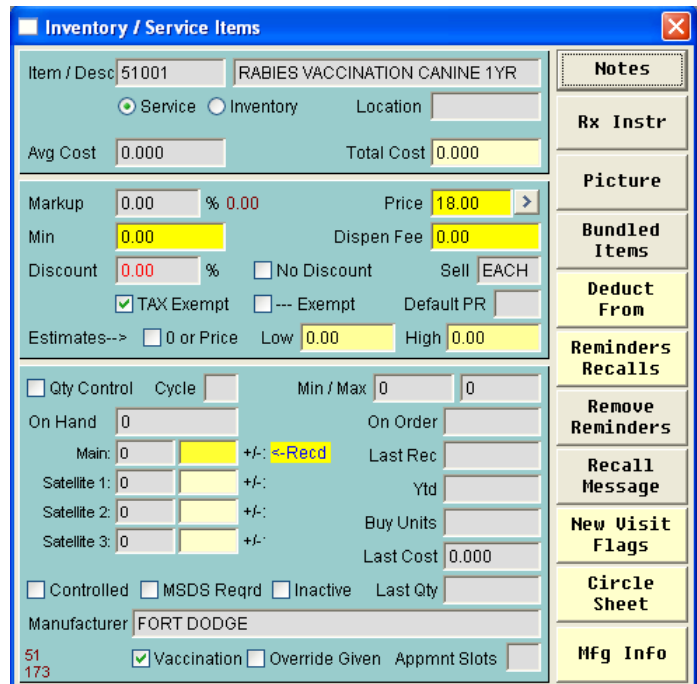
WHERE TO GO FROM HERE

Now that you have a better understanding about using *ClienTrax*, we hope you will call us to order your own program soon. We will be glad to help you select the version of *ClienTrax* that will best serve you for your specific practice.

If You Need Assistance with *ClienTrax*

As you use *ClienTrax*, you can turn to many resources for help. Along with the printed and on-line documentation, we offer a comprehensive technical support program. You may also want to know about other options and products that were designed to work with *ClienTrax*. Call 1-614-875-2245 or 1-800-416-2815. You can also e-mail questions to sales@clientrax.com

Technical Support

Software registration entitles you to 6 months of free technical support, beginning from your time of purchase. For information about this program and how to subscribe, call ClienTrax at 1-614-875-2245 or 1-800-416-2815. Additional support may be renewed for 12-month periods.

Telephoning Technical Support
Call ClienTrax Technical Support Monday through Friday from 8:00 AM to 9:00 PM Eastern at 1-800-416-2815. Reaching us by FAX - Send faxes to 1-614-539-9945.

Writing to Technical Support
Send all written correspondence to:
ClienTrax Software
4716 Harrisburg Pike
Grove City, OH 43123
Attention: Technical Support

E-Mail Technical Support
support@clientrax.com

Product Suggestions
We are always interested in your comments and suggestions for improving *ClienTrax*. Send us your comments by fax, E-Mail or regular mail as described above. Please mark your comments "Attention: Product Development."