

Emailing an Animal History FP27

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Introduction

This document details the new functionality that has been developed to enable a user to email an Animal History directly from RoboVet. It details how a user can:

- Open an email screen directly from within the animal record in RoboVet and preview the Animal History that has been attached prior to sending the email.
- Type recipient email addresses in the 'To' field and also be able to select recipients from a list of options relevant to the client/animal including client, client contact, referring vet (where applicable) and suppliers.
- Edit the 'Subject' field and add further detail in the main body of the email.
- Add other attachments from the client/animal/consultation record as well as other attachments from outside of RoboVet and preview these attachments prior to sending the email.
- Send the email from within RoboVet and see a record of this in the Communications tab.

It also covers changes that have been made to the 'Animal History' report (historically known as the 'Consultation Detail' report). These changes have been made to ensure that the report can be used to provide a full medical record, and also a full financial record, where necessary.

Important Information

This section details setup information that is required by Vetsolutions Support and highlights other important details that practices should be aware of.

Required Setup Details

If email functionality is already being used to email invoices and statements for example, then all required setup should be in place. If emailing is not being currently used and the practice wishes to enable it then please contact support to configure the required settings.

Support will need to know:

- SMTP Server
- SMTP Port
- Email Username
- Email Password

The ISP (Internet Service Provider) of the Practice email account should be able to provide the SMTP server, SMTP Port (usually 25) and a username and password if authentication is required.

Please note: It is recommended that the emailing functionality is set up so that all emails are sent from one central practice email address.

There are no new security settings connected with this functionality.

Optional Setup Details

- **Referral Mode**
In order for a user to be able to record details of referring vets/practices and assign a referring vet to an animal, there is a referral setting that must be turned on. This also enables the new emailing

functionality to display the relevant referring vet/practice email addresses to the user when selecting recipients for the Animal History report email.

- **Maximum email size**

The default maximum email size is 10MB in total (inclusive of any file attachments). If it is necessary to adjust the maximum email size allowed, this can be done using a setting.

- **Maximum file attachment size**

The default maximum file attachment size is 4MB. If it is necessary to adjust the maximum file size allowed for an attachment, this can be done using a setting.

- **Blocked file types**

The following file types are blocked by default, as these would normally be rejected by some email clients for security reasons - *exe,com,bat,batch,java,cmd,dll,jse,js,sct,vb,vbe,wsf,msi,ps 1*

If it is necessary to change the type of files permitted to be added to an email as an attachment, this can be done using a setting.

Please contact Vetsolutions Support to adjust any of the above settings.

Changes to Animal History (Consultation Detail) Report

Changes have been made to the Animal History report to ensure that it can be used to provide a full medical record, and also a full financial record, where necessary.

The Animal History now shows products at all levels (parent and POS) by default. It overrides any show/hide settings in the Product List as follows:

- All POS products (whether stock or service) will be displayed on the report, regardless of whether any of these products are set up in the PLM to be hidden from the client.
- POS group names will never be displayed on the report.
- Standard fees will never be displayed on the report.
- Travel bands will never be displayed on the report.

If the user chooses to include financial information then:

- There will be a value in £ against each POS product to show the cost of that product, regardless of whether the price is set up in the PLM to be hidden from the client.
- The price of any standard fees or travel bands will be absorbed into the price of the product with which that fee/band is associated.
- The value in £ that is displayed against the parent product is the sale line value (i.e. the cost of the parent product plus all POS products and any standard fees or travel bands associated with the parent product or any POS products).

It should be noted that if a user wishes to generate an Animal History report as it looked before these changes were made, they can do so by filtering to only show products at parent level. In order to assist the user, a description of what each filter does is provided as the user works through the process of generating the report.

If the user does not wish to include certain consultation types, such as surcharges, the 'Consultation Type' filter can be used to exclude/include items as appropriate.

The report also:

Emailing an animal history

- now displays batch information (including split batches) at both parent and POS level.
- now displays the client home/mobile numbers and email address, if available in RoboVet. If these details are not available, this will be indicated on the report.
- is now titled 'Animal History' rather than 'Consultation Detail Report'.

Please see Appendix A for example Animal History reports.

Emailing Limits Summary

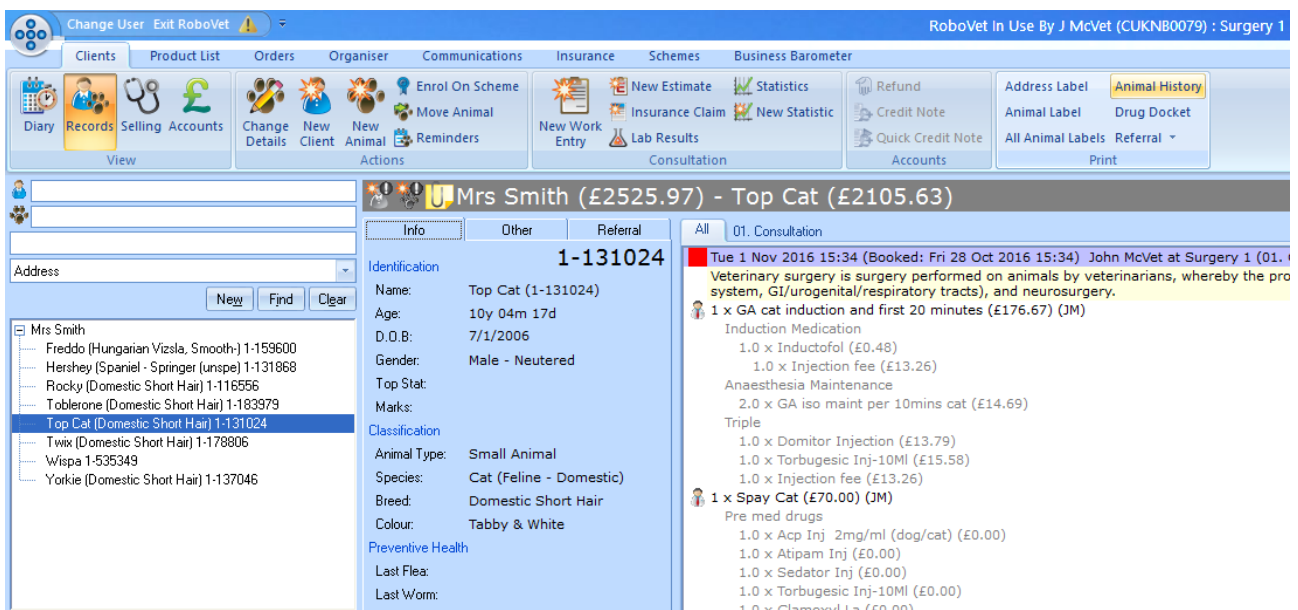
- Email subject length is limited to 255 characters.
- Email body text is limited to 2000 characters.
- There is no limit on the number of attachments that can be added to the email.
- The default maximum file size for an attachment is 4MB – this can be adjusted (*see section 'Optional Setup Details'*).
- The default maximum email size is 10MB – this can be adjusted (*see section 'Optional Setup Details'*).

Emailing Animal Histories Functionality

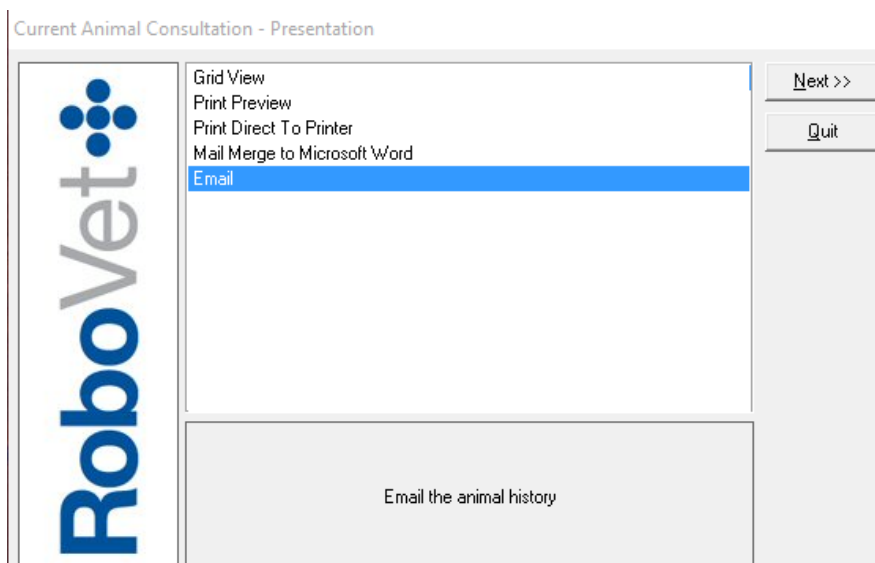
The sections below provide a step-by-step user guide to the new Emailing Animal Histories functionality.

Generate Animal History Report & New Email Screen

In order to generate the Animal History to attach to the email, the user accesses the relevant animal record in RoboVet and clicks on 'Animal History' (top right). It is also possible to generate the same report by selecting 'All Reports>Consultation>List Current Animal Consultation' from the main RoboVet menu. Note that not all users will have access to 'All Reports'.



The user selects 'Email' from the list of presentation options.



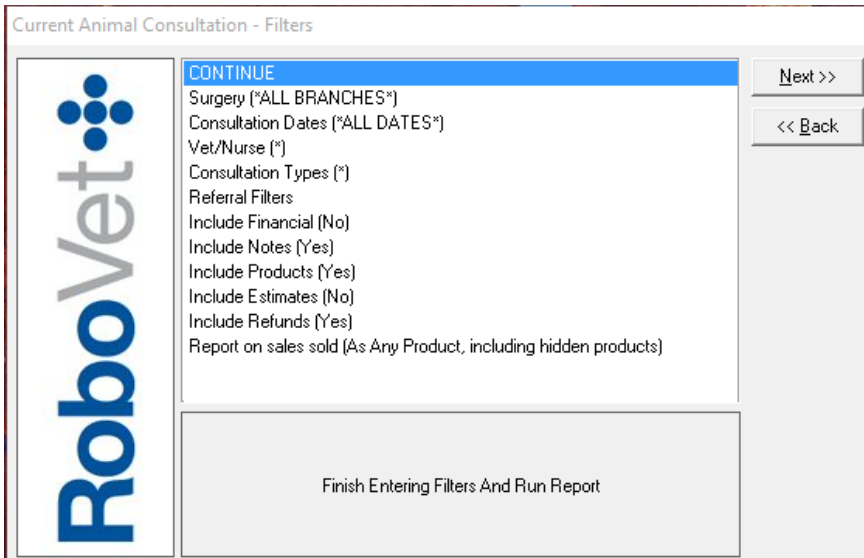
On clicking 'Next', the user is presented with a number of filters that can be applied to ensure that the most appropriate report is generated. The default set up for the filters enables the user to click straight through to the generation of a report that includes all products sold (historically the report was only set up to show

Emailing an animal history

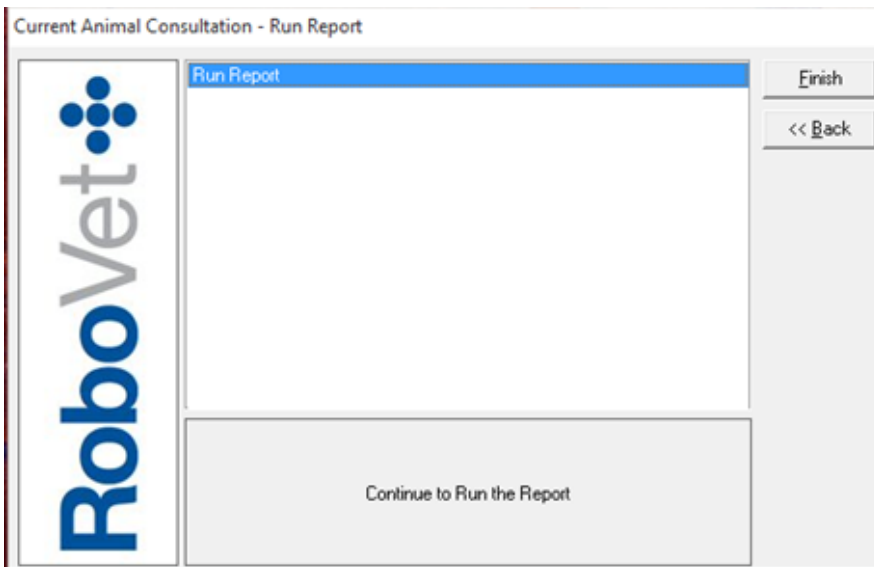
products at parent level) and clinical notes, and does not include financial information. These defaults have been set in order to make it easy as possible to generate a full medical history report for an animal to send on to another vet.

In order to assist the user, a description of what each filter does is provided as the user works through the process of generating the report.

Once the user has applied any filters required, they select 'CONTINUE' and click 'Next':



The user is presented with the 'run report' screen and clicks 'Finish' to do so.



The Animal History report is generated as an email attachment in the background. It can be accessed, for checking prior to sending, by selecting it from the attachments section of the new email screen and clicking the 'preview' button.

Please see Appendix A for example Animal History reports.

Add Recipients & Compose Email

Following generation of the Animal History report in the background, an email screen is presented to the user. Note that if the user needs to carry out another action in RoboVet whilst in the middle of composing the email they are able to do so. The email screen will remain open outside of RoboVet and can be accessed by clicking on the icon on the taskbar e.g.



Email Animal History For Top Cat Smith

To...

Subject: (Remaining characters: 223)

(Remaining characters: 2000)

Attachments:

File	Size
AnimalHistory_Top Cat_Smith.pdf	18.71 KB

(Total email size: 18.74 KB/10 MB)

Preview
Remove
Add...
Browse...

Send
Cancel

Recipient field

- This field is blank by default.
- The user can type in one or more email addresses, each separated by a semicolon.
- Auto-complete is enabled for the first email address entered and will search on name/email address to find email addresses associated with the client/animal, referring vet/practice (if applicable) and suppliers. The search looks at the same data as is displayed on the additional email addresses screen that the user can access by clicking on the 'To' button.
- There is no maximum number of email addresses.

'To' button

- The user clicks on the 'To' button and a screen opens that enables the user to select one or more additional recipients from a list of email addresses associated with the client/animal, as well as suppliers and referring vets (where applicable). The user can filter by 'Type' and can re-order the data in each column by clicking on the column header.
- One or more addresses can be selected and added to the recipient field by clicking 'Add'.
- If any expected names are missing from this list, it is because they do not have an email address stored in RoboVet. This screen only shows people/organisations that have an email address recorded in RoboVet.
- If a client/client contact is marked on their record in RoboVet as being excluded from receiving marketing or reminders by email this is clearly marked in the 'Opt Out' column. The example below shows that the Client Contact Mr Jones is marked as being excluded from receiving marketing by email. An 'opted out' email address can be added to the recipient field and the user is warned at the point of sending the email. The user is able to override this and send the email.

Select Email Addresses

Type: Show All Client Client Contact Supplier Referring Practice

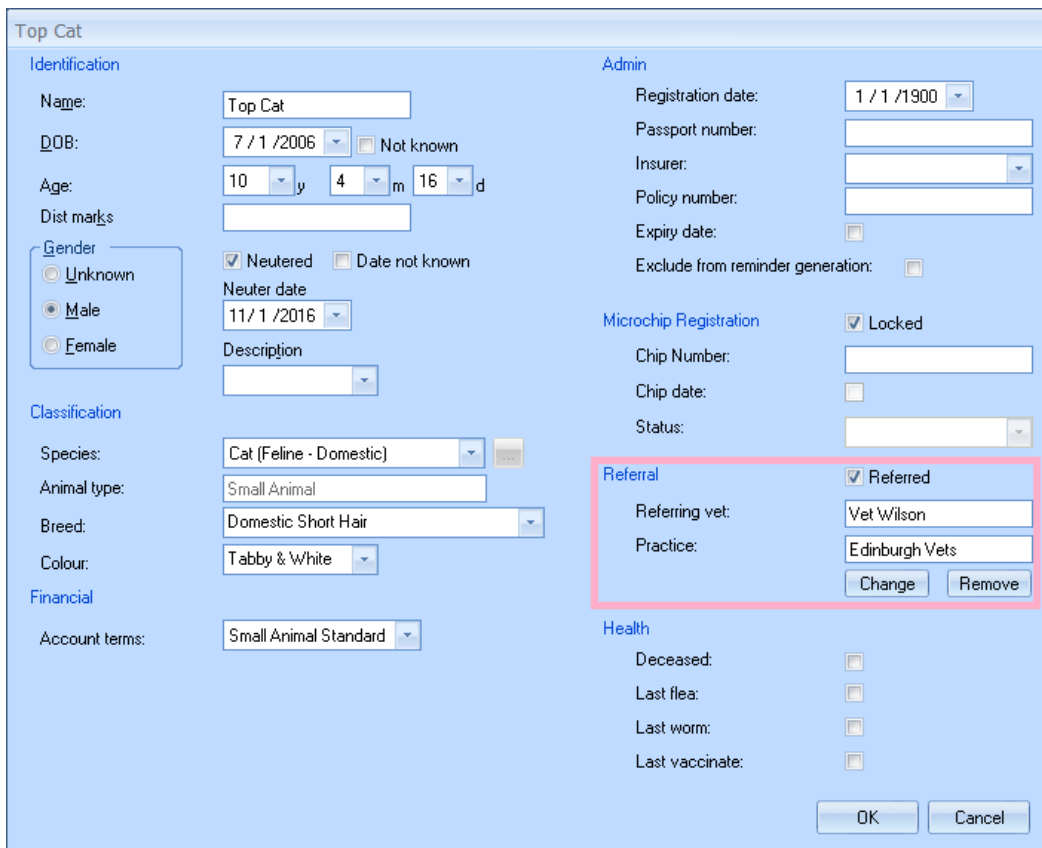
Type	Name	Email Address	Opt Out
Client	Mrs Smith	emailtomrsmith@gmail.com	
Client Contact	Mr Jones	emailtomrjones@gmail.com	Marketing
Referring Practice	Edinburgh Vets	mainemail@edinburghvets.com	
Referring Vet	Edinburgh Vets - Vet Davies	vetdavies@edinburghvets.com	
Referring Vet (Top Cat)	Edinburgh Vets - Vet Wilson	vetwilson100@gmail.com	
Supplier	Best Vet Supplies	info@bestvetsupplies.com	
Supplier	Great Vet Supplies	info@greatvetsupplies.com	

Selected emails:

emailtomrsmith@gmail.com;emailtomrjones@gmail.com;vetwilson100@gmail.com

Recipient types are:

- **Client**
 - Email address on the main client record.
- **Client contact**
 - Email addresses of any of the client's contacts.
- **Suppliers**
 - Email addresses of any suppliers listed on the user's RoboVet system.
- **Referring vets**
 - Email address for the contact identified as the animal's referring vet on the animal record. If a 'referring vet' has been assigned to the animal record this is shown by the inclusion of the animal's name in () next to 'Referring Vet' in the 'Type' column. This can be seen in the example above.
 - Any other email addresses associated with the referring vet's practice



Top Cat

Identification

Name: Top Cat

DOB: 7 / 1 / 2006 Not known

Age: 10 y 4 m 16 d

Dist marks

Gender

Unknown

Male

Female

Neutered Date not known

Neuter date: 11 / 1 / 2016

Description

Classification

Species: Cat (Feline - Domestic)

Animal type: Small Animal

Breed: Domestic Short Hair

Colour: Tabby & White

Financial

Account terms: Small Animal Standard

Admin

Registration date: 1 / 1 / 1900

Passport number:

Insurer:

Policy number:

Expiry date:

Exclude from reminder generation:

Microchip Registration

Locked

Chip Number:

Chip date:

Status:

Referral

Referred

Referring vet: Vet Wilson

Practice: Edinburgh Vets

Health

Deceased:

Last flea:

Last worm:

Last vaccinate:

Subject field

- This is populated with 'Animal History for Animal-Name Client-Surname', e.g. 'Animal History for Top Cat Smith'. This can be edited by the user prior to sending.
- The length of subject is limited to 255 characters. The user is shown how many available characters remain and is prevented from typing any further text once the limit is reached.

Main Body field

- This is blank for the user to enter their own message.
- The length of body text is limited to 2000 characters. The user is shown how many available characters remain and is prevented from typing any further text once the limit is reached.

- The format is plain text. It is therefore not possible to add an email signature. However, if the email account in use has a footer set up (e.g. for a data protection statement) this should be automatically visible to the recipient.

Email Animal History For Top Cat Smith

To... emailtomrsmith@gmail.com;emailtomrjones@gmail.com;vetwilson100@gmail.c

Subject: Animal history for Top Cat Smith (Remaining characters: 223)

Please find attached animal history for Top Cat Smith who was treated at our surgery last night.

Best wishes

John McVet

Attachments: (Remaining characters: 1875)

File	Size
AnimalHistory_Top Cat_Smith.pdf	18.71 KB

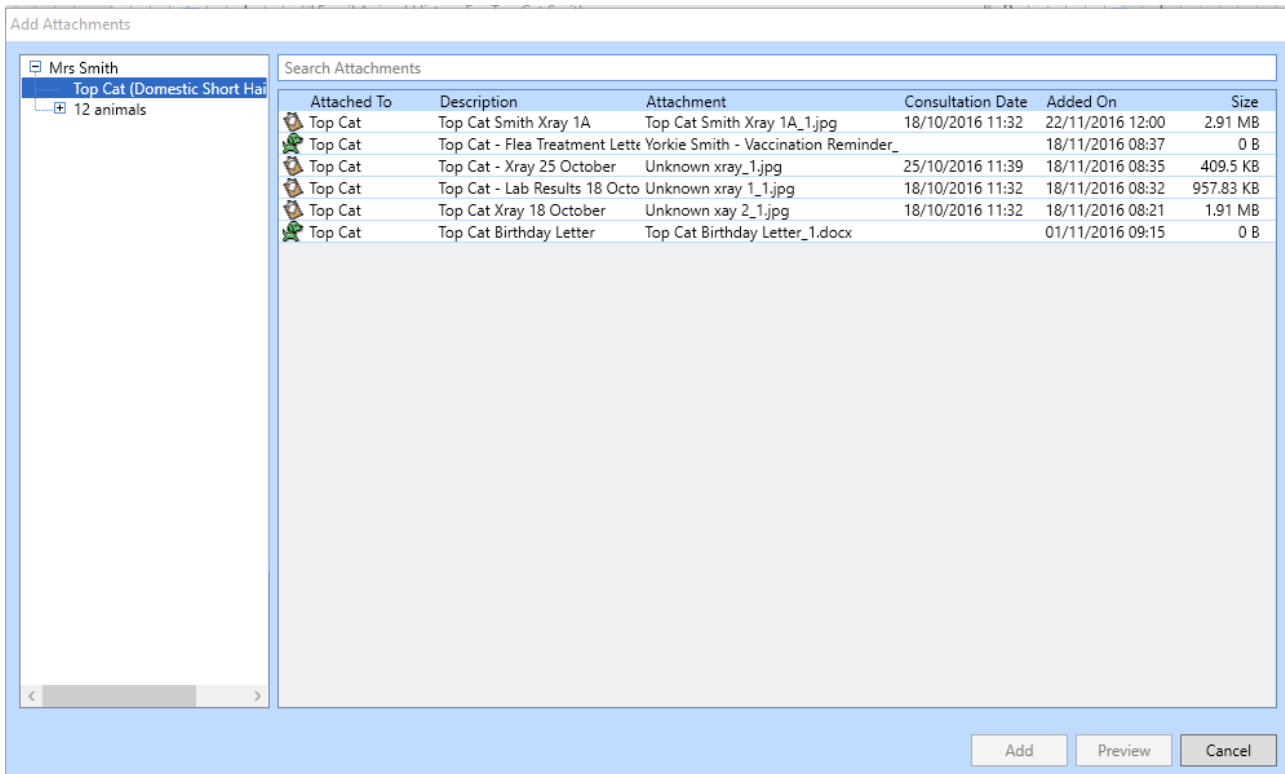
(Total email size: 18.87 KB/10 MB)

Attachments

The Animal History will automatically attach to the email and can be previewed by selecting the file name and clicking 'Preview'. Additionally, the user can choose to add other files already attached to the client/animal/consultation record in RoboVet, and also files available on their computer/network.

Adding RoboVet Attachments

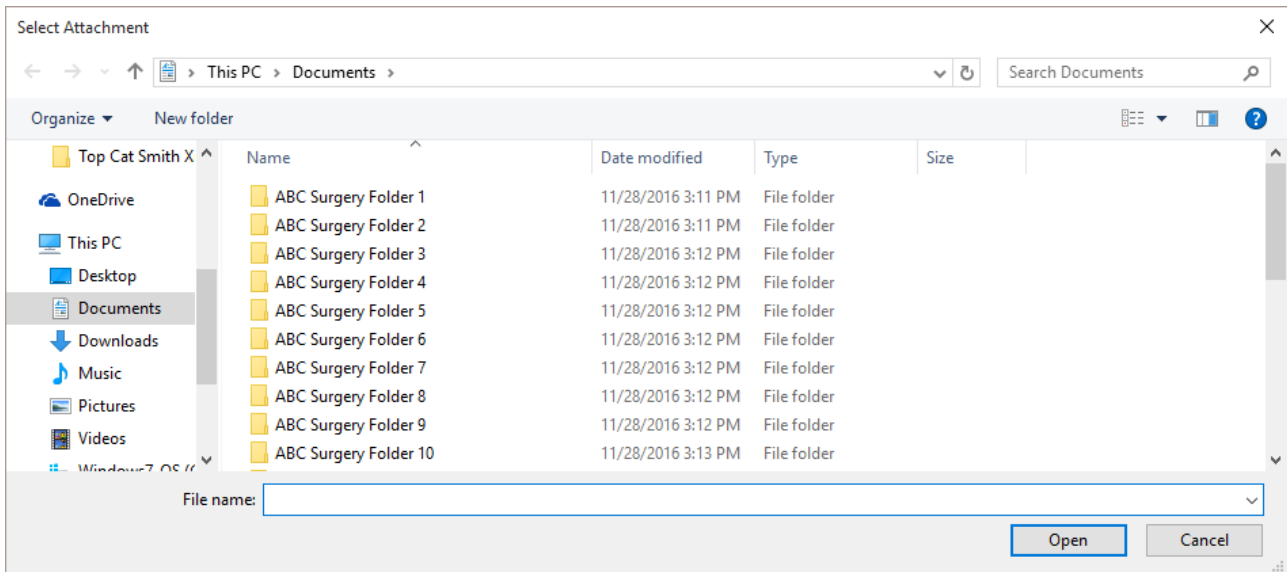
In order to add files already attached to the client/animal/consultation record in RoboVet, the user clicks the 'Add' button on the email screen to open the 'Add Attachments' window:



- By default, the animal that is the subject of the email will be pre-selected in the left hand side of the window and the view will show all animal and consultation level attachments sorted by date added (most recent first).
- Should the user wish to see attachments at the client level they can do so by clicking on the client name. This will also show all attachments for that client's animals in one list, grouped by animal.
- Attachments on the record of other animals owned by the same client can be viewed by expanding the list of animals in the left hand window pane.
- The user can enter text in the 'Search Attachments' field to narrow down the results. The search function looks at the contents of the 'Attached To', 'Description' and 'Attachment' columns as well as the client/animal names.
- An attachment can be previewed from this screen by highlighting the file and clicking the 'Preview' button.
- The user can add single or multiple attachments from this window by selecting the files and clicking the 'Add' button.
- The 'Cancel' button closes the 'Add attachments' screen and returns the user to the main email screen.

Browsing for Other Files

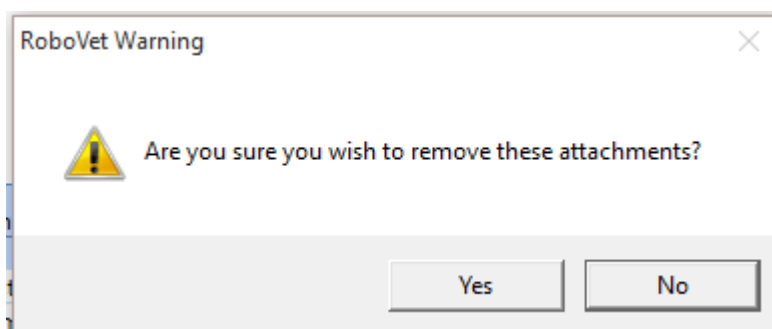
In order to add files from their computer/network the user should click 'Browse' to launch a standard Windows file browsing dialog box.



The user can select one or more files and click 'Open' to add the file(s) to their email.

Attachments General Information

- The user can select any single attachment that they have added, and preview it prior to sending the email.
- There is no limit on the number of attachments that can be added to the email.
- The user can select one or more attachments that have been added to the email and remove these prior to sending. **Note:** If the user removes the Animal History, this cannot be reattached. The user would need to restart the process from the beginning. A warning message asks for user confirmation prior to the removal of any attachment.



Email Animal History For Top Cat Smith

To... emailtomrsmith@gmail.com;emailtomrjones@gmail.com;vetwilson100@gmail.c

Subject: Animal history for Top Cat Smith (Remaining characters: 223)

Please find attached animal history for Top Cat Smith who was treated at our surgery last night.

Best wishes

John McVet

(Remaining characters: 1875)

Attachments:

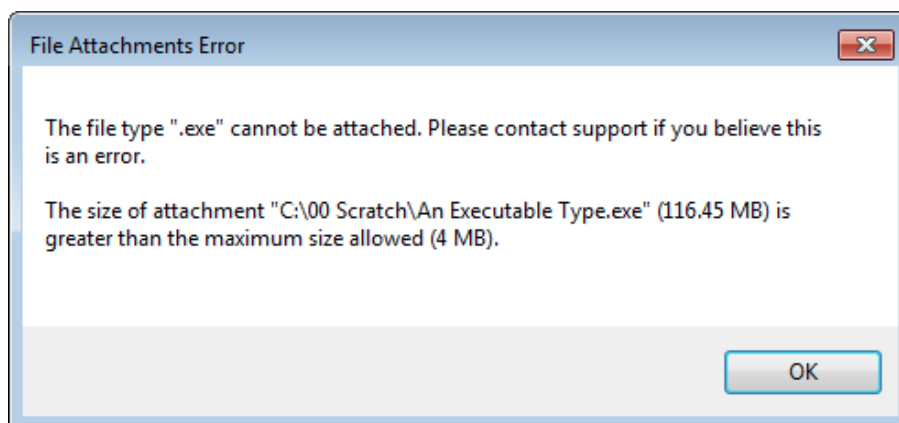
File	Size
AnimalHistory_Top Cat_Smith.pdf	18.71 KB
Top Cat Smith Xray 1A.jpg	2.91 MB
Top Cat Smith Xray 1B.jpg	2.92 MB
Top Cat Smith Xray 1C.jpg	2.28 MB
Top Cat Smith Xray 1D.jpg	1.78 MB
Top Cat Smith Xray 1E.jpg	1.86 MB

(Total email size: 11.78 MB/10 MB)

Preview Remove Add... Browse...

Send Cancel

- The user can easily see if their email has become too large as the 'Total email size' text will become red. The default maximum email size is 10MB (see section 'Optional Setup Details')
- The user may experience an error message if they attempt to add a file that is too large (default limit is 4MB) or is of a type that is not permitted (see section 'Optional Setup Details');



- When an email is sent to multiple recipients, each recipient will see a slightly different file name for each attachment based on their position in the list of recipients in the 'To' field of the email. For example, the first recipient will see that the first attachment ends 1_1_1, the second attachment ends 1_1_2, the third ends 1_1_3 and so on. The second recipient would see 1_2_1 for the first attachment, 1_2_2 for the second 1_2_3 for the third, and so on. The important thing to note is that each recipient will receive exactly the same file(s).

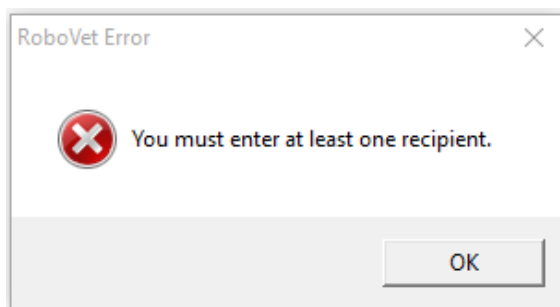
Send Email

Once the user is satisfied with the email they have composed and the attachments that they have included, they have the choice of either sending the email or cancelling it. Following the selection of either option, the user is given the choice of exiting the report or running the report again.

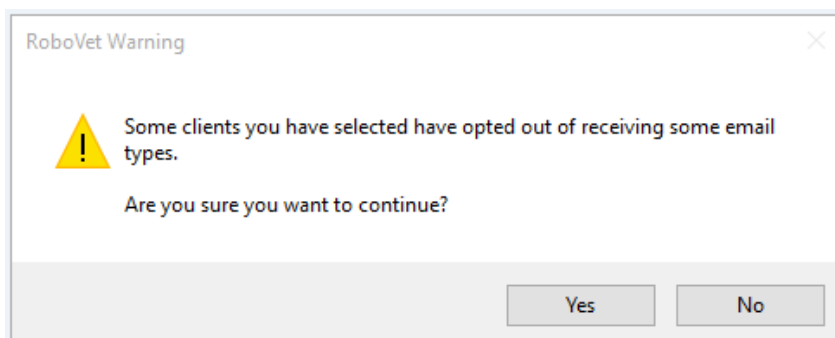
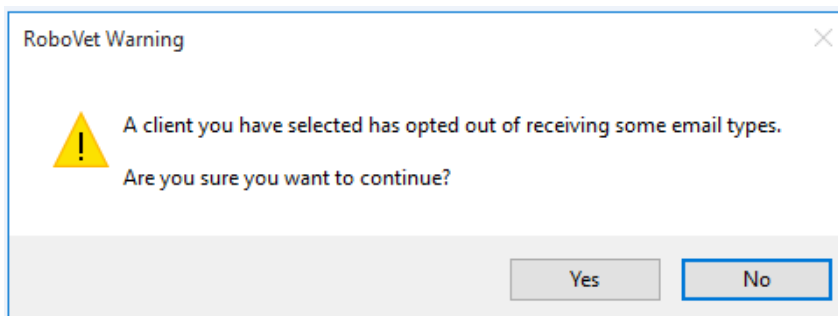
- The '**Cancel**' button closes the email screen and aborts the process.
- The '**Send**' button sends the email to all intended recipients.

On choosing to send the email, validation is applied at several levels:

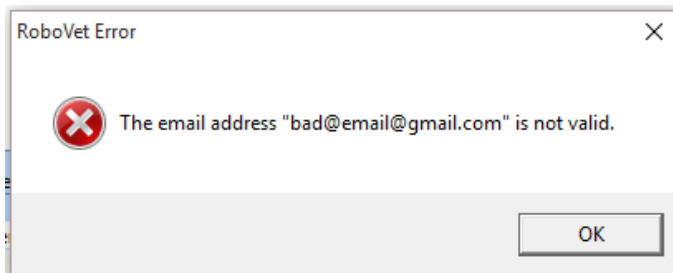
- If the user attempts to send the email without adding any recipients an error message will be shown:



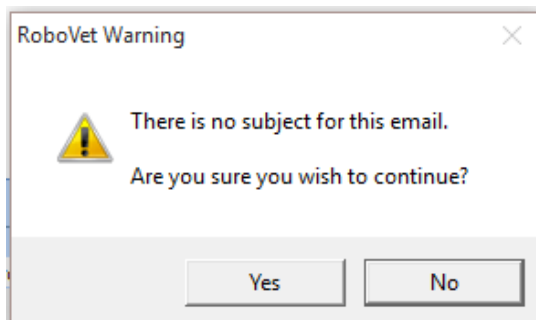
- If the user attempts to send an email that includes one or more client/client contact email addresses opted out of receiving marketing and/or reminders the user is warned but can choose to continue and successfully send the email to the opted out email address:



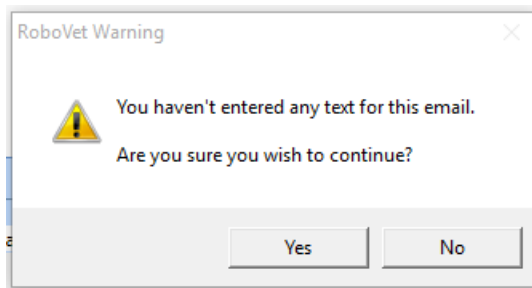
- If the user attempts to send to an email address that is invalid (e.g. has more than one '@' symbol), an error message will be shown. The user must edit/remove the invalid address and re-try sending the email.



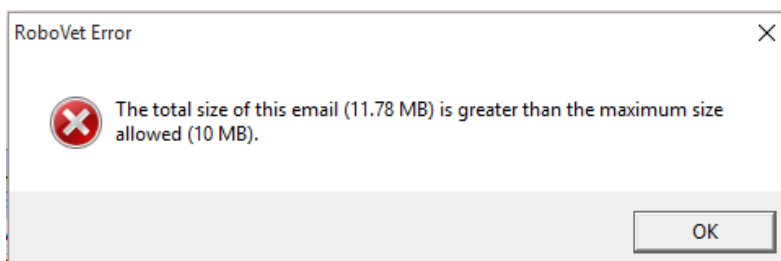
- If the user deletes the subject and leaves the field blank, a warning message is shown. The user can override this warning by clicking 'Yes'. Clicking 'No' will allow the user another opportunity to enter text.



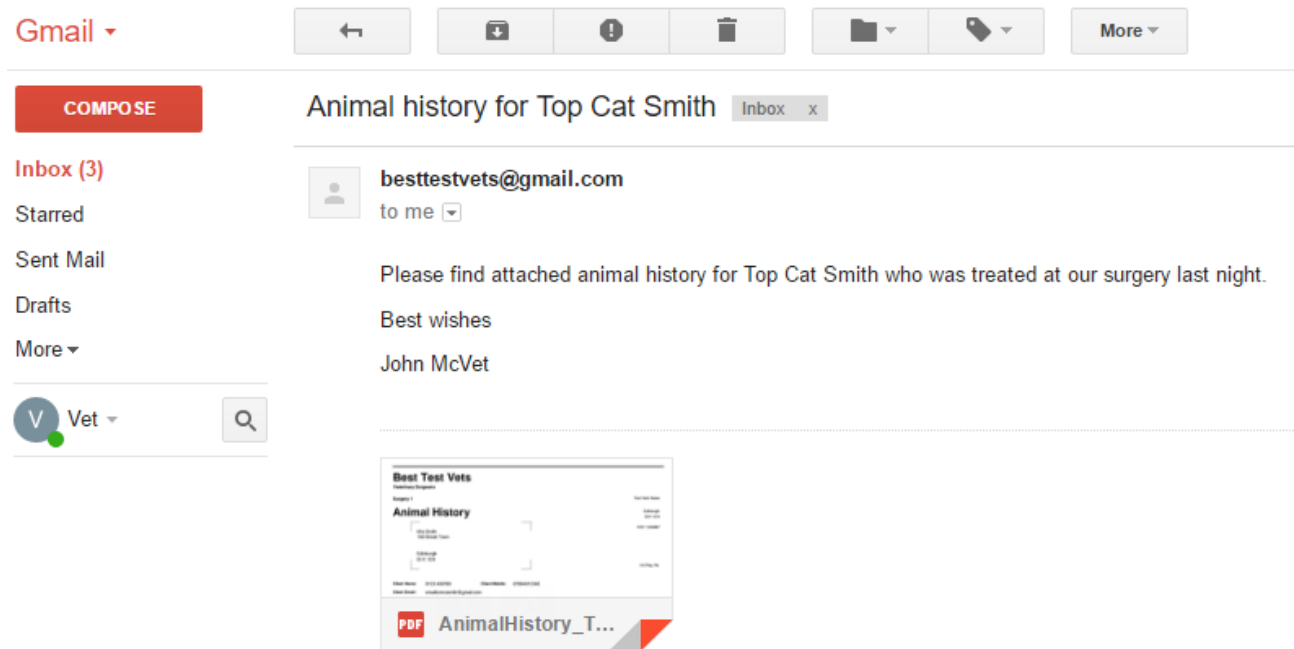
- The user does not have to enter text in the 'body' field. If the field is left blank a warning message is shown when the user tries to send the email. The user can override this warning by clicking 'Yes'. Clicking 'No' will allow the user another opportunity to enter text.



- If the user attempts to send an email that is too large, an error message is shown. The user can click "Ok" and will be returned to the main email screen where they can reduce the size of their email by removing one or more attachments.



The recipient will receive the email as below and can reply directly to the sender. (Please note replies are NOT picked up in RoboVet but in the email client as usual).



Once the email has been sent, the user can visit the 'Communications' tab from the client/animal record in RoboVet. Here the user can see the status of the email and can open a copy of the email, as well as any attachments that were included.

This provides an audit trail of emails sent from within RoboVet. Note that if a single email has been sent to more than one recipient, each recipient email address is contained within a separate row.

The 'Communication' column to the far right shows the first 100 characters of the email body text.

Source	Description	Sent	Status	Contact	Details	Sent By	Surgery	Communication
Manual	WorkWith	18/11/2016 08:50	⚡ Sent	Mrs Smith	emailomrsmith@gmail.com	J McVet	Surgery 1	Please find attached animal history for Top Cat Smith who was treated at our surgery last night. B
Manual	WorkWith	18/11/2016 08:50	⚡ Sent	Mrs Smith	emailomrjones@gmail.com	J McVet	Surgery 1	Please find attached animal history for Top Cat Smith who was treated at our surgery last night. B
Manual	WorkWith	18/11/2016 08:50	⚡ Sent	Mrs Smith	vetwilson100@gmail.com	J McVet	Surgery 1	Please find attached animal history for Top Cat Smith who was treated at our surgery last night. B

If the user enters an email address that does not exist (e.g. where the address has a valid format but has been mistyped), the email will show as 'sent' in the communications tab. However, the user's email inbox will receive a bounce back advising that the email was undeliverable.

Appendix A – Example Animal History Reports

This report displays the default filters. It shows all products, including batch information (parent and POS) and clinical notes. It does not show financial information.

Best Test Vets

Veterinary Surgeons

Surgery 1

Animal History

Mrs Smith
100 Street
Edinburgh
EH1 1EH

Test Vets House

Edinburgh
EH1 1EH

0131 1234567

Vet Reg. No.

Client Home: 0123 456789

Client Mobile: Not Available

Client Email: emailtomrsmith@gmail.com

Animal: Top Cat	Species: Cat (Feline - Domestic)	Colour: Tabby & White
DOB: 01 July 2006	Breed: Domestic Short Hair	
Age: 10y 04m 28d		
Identity Chip Code:		Gender: Male - Neutered/Spayed

Insurance Company:	Policy Number:
--------------------	----------------

Treatment Date:	01 Nov 2016 15:34	
Surgery	Surgery 1	01. Consultation
Vet / Nurse	John McVet	

Item

- 1.00 x GA cat induction and first 20 minutes
 - 1.00 x Inductofol
 - 1.00 x GA Iso maint per 10mins cat
 - 1.00 x Domitor Injection
 - 1.00 x Torbugesic Inj-10MI
- 1.00 x Spay Cat
 - 1.00 x Acp Inj 2mg/ml (dog/cat)
 - 2.00 x Atipam Inj
 - 1.00 x Sedator Inj
 - 1.00 x Torbugesic Inj-10MI
- 1.00 x Alamyacin Aerosol 140g
 - Batch: 1.00 x EV0012345 Expiry: 18/11/2017

Clinical Notes: Veterinary surgery is surgery performed on animals by veterinarians, whereby the procedures fall into three broad categories: orthopaedics (bones, joints, muscles), soft tissue surgery (skin, body cavities, cardiovascular system, Gastrointestinal/respiratory tracts), and neurosurgery.

Report Filter: Options: Consultation Dates: 2016-10-26 00:00:00 - 2016-11-29 23:59:59, Include Financial: No, Include Notes: Yes, Include Product

Printed By: SUPERTECH Page 1 Of 1 Using RoboVet(TM) From Veterinary Solutions Limited

Best Test Vets

Veterinary Surgeons

Surgery 1

Test Vets House

Animal History

Edinburgh
EH1 1EH

0131 1234567

Mrs Smith
100 Street
Edinburgh
EH1 1EH

Vet Reg. No.

Client Home: 0123 456789

Client Mobile: Not Available

Client Email: emailtomrsmith@gmail.com

Animal: Top Cat

Species: Cat (Feline - Domestic)

Colour: Tabby & White

DOB: 01 July 2006

Breed: Domestic Short Hair

Age: 10y 04m 28d

Identity Chip Code:

Gender: Male - Neutered/Spayed

Insurance Company:

Policy Number:

Treatment Date: 01 Nov 2016 15:34

Surgery: Surgery 1

01. Consultation

Vet / Nurse: John McVet

Item	Nett	VAT	Total
1.00 x GA cat induction and first 20 minutes	130.05	26.01	156.06
1.00 x Inductofol	11.45	2.20	13.74
1.00 x GA Iso maint per 10m Ins cat	0.12	1.22	7.34
1.00 x Domitor Injection	11.40	2.30	13.70
1.00 x Torbugesic Inj-10MI	12.08	2.00	15.58
1.00 x Spay Cat	100.74	20.16	120.90
1.00 x Acp Inj 2m g/ml (dog/cat)	8.14	1.63	9.77
2.00 x Atipam Inj	14.38	2.88	17.20
1.00 x Sedator Inj	0.01	1.38	8.20
1.00 x Torbugesic Inj-10MI	12.08	2.00	15.58
1.00 x Alamyacin Aerosol 140g	7.42	1.48	8.90
Batch: 1.00 x EV0012345 Expiry: 18/11/2017			

Totals Inclusive of Refunds

238.21 47.65 **285.86**

Clinical Notes: Veterinary surgery is surgery performed on animals by veterinarians, whereby the procedures fall into three broad categories: orthopaedics (bones, joints, muscles), soft tissue surgery (skin, body cavities, cardiovascular system, Genitourinary/respiratory tracts), and neurosurgery.

Report Filter: Options: Consultation Dates: 2016-10-26 00:00:00 - 2016-11-29 23:59:59, Include Financial: Yes, Include Notes: Yes, Include Product

Printed By: SUPERTECH

Page 1 Of 1

Using RoboVet(TM) From Veterinary Solutions Limited

This report shows products only at parent level, and financial information.

Emailing an animal history

Best Test Vets

Veterinary Surgeons

Surgery 1

Test Vets House

Animal History

Edinburgh
EH1 1EH

0131 1234567

Mrs Smith
100 Street
Edinburgh
EH1 1EH

Vet Reg. No.

Client Home: 0123 456789 Client Mobile: Not Available

Client Email: emailtomrsmith@gmail.com

Animal: Top Cat Species: Cat (Feline - Domestic) Colour: Tabby & White
 DOB: 01 July 2006 Breed: Domestic Short Hair
 Age: 10y 04m 28d Gender: Male - Neutered/Spayed
 Identity Chip Code:

Insurance Company: Policy Number:

Treatment Date: 01 Nov 2016 15:34
 Surgery: Surgery 1 01. Consultation
 Vet / Nurse: John McVet

Item	Nett	VAT	Total
1.00 x GA cat induction and first 20 minutes	130.05	26.01	156.06
1.00 x Spay Cat	100.74	20.16	120.90
1.00 x Alamyacin Aerosol 140g Batch: 1.00 x EV0012345 Expiry: 18/11/2017	7.42	1.48	8.90
Totals Inclusive of Refunds	238.21	47.65	285.86

Clinical Notes: Veterinary surgery is surgery performed on animals by veterinarians, whereby the procedures fall into three broad categories: orthopaedics (bones, joints, muscles), soft tissue surgery (skin, body cavities, cardiovascular system, Glu/urogenital/respiratory tracts), and neurosurgery.

Report Filter: Options: Consultation Dates: 2016-10-26 00:00:00 - 2016-11-29 23:59:59, Include Financial: Yes, Include Notes: Yes, Include Product

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