

Vetech View

It's That Time of Year Again!

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Please Note: Holiday Schedule

Christmas
12/22/06 – Half day.
12/25/06 - Closed

New Years
12/29/06 – Half day.
01/01/07 – Closed.

Deleting old Staff

We get many questions and issues that arise from deleting old staff members. Some examples are:

Why can't I delete a staff member?

I deleted a staff member, now how do I get them back?

I deleted a staff member, now they don't show up on reports?

I have duplicate staff members, which one should I delete?

Staff entries are cross referenced throughout the Advantage program. Staff members are tracked at invoice and payment time, for appointments, for production reports, etc.

While there is nothing wrong with deleting staff members, you should first consider why you want to delete them. Do you not want staff to show up on the appointment schedule, or invoices, Time Tracker, etc? Do you think that deleting former staff will free up valuable disk space? Did you have a bad exit with a particular staff member and just don't want to see their name anymore?

If any of the above is the case, you may consider not actually deleting staff members, but instead you can basically disable a staff entry. It is very simple to remove a staff member from the appointment schedule, invoice list, etc. but not actually delete the staff member so you can still have access to their historical data like past production information. Deleting a staff member will not free up any hard disk space at all. Finally, you can simply rename a staff person to not view their name.

Here are some suggested steps to "disable" a former staff member entry.

1. In the Staff Setup window create a new staff group called "Former Staff" or something equivalent. You can also take this a step further and have multiple categories "Former Doctors" "Former Reception", "Former Tech" , etc. Setup this new staff group with no security rights as in the following example.

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Thought for the month: **In order to be irreplaceable one must always be different.**
[Coco Chanel](#) (1883 - 1971)



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Watch For Us!

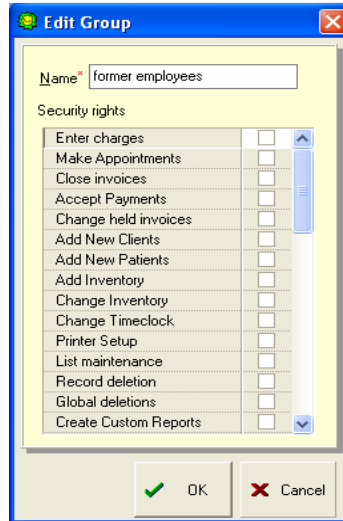
Vetech will be exhibiting at the following trade shows. Please stop by and say hello!

AAEP , San Antonio Dec. 3-5

NAVC, Orlando, Jan. 14-17

WVC, Las Vegas, Feb 19-21

We're on the Web!
See us at:
www.vet-software.com



Staff group window with no security rights

2. Edit a particular staff member and move them to staff group "Former Staff". Uncheck to disable the staff options "Provider", "Include on Appt. Schedule", "Include on Time Tracker", and "Include on Invoice List".
3. You can also change both the Name and Login fields if you wish. For instance, Dr. Joe Smith could be renamed - "ZZ Smith – quit in 11/06".

Most of the time deleting a staff member causes no issues at all. However it is common that we get requests to "undelete staff". We have developed a utility that does just this. So if you have accidentally deleted staff and want to retrieve them, we can restore all deleted staff members. This utility is on our standard program CD. Give our office a call for assistance using it.

End of Year Procedures

A frequent question we are asked this time of year is "What do I need to do for the end of the year?" The simple answer is Nothing! At the end of December, you should print whatever reports you normally print on a monthly basis. If you want to get some yearly financial reports, you can do it at this time also. Of course with Advantage you can go back and print 2006 reports at any time in the future as well. Again there is nothing special that needs to be done to for Advantage to close the year.

The first time you run Advantage in 2007, you will be prompted with a message indicating that the system year has changed and you should update client YTD purchase history. You should answer yes to this question. Doing so will recalculate the YTD purchase fields on the Client+ window. This should take 5-10 minutes or less for most users and you will not be prompted again – until next year. That's it! Now you are ready to go for 2007.

Good Advice!

