

DVMSUCCESS · VET-TELLIGENCE

# Sign-Up & Onboarding Guide

Everything you need to get your practice connected and your dashboards flowing.



Step-by-step walkthrough for veterinary practices

## STEP 1

# Access the Vet-Telligence Sign-Up Page

Begin by locating the sign-up page from our website.

### 1 Visit our website

Go directly to [www.vettelligence.ai](http://www.vettelligence.ai), or visit [www.dvm.com](http://www.dvm.com) and click **Vet-Telligence** at the top.

### 2 Open the sign-up form

Click **Sign Up for Vet-Telligence**.

## STEP 2

# Fill Out the MWI Sign-Up Form

This first form comes from MWI (our billing partner). Complete it with your practice details.

### 1 Enter your information

Provide your practice name, email, phone, website, and address.

### 2 Add any codes you have

Enter a referral or discount code if one was given to you.

### 3 Skip what doesn't apply

Leave the code fields blank if you don't have any — they're optional.

**Heads up:** If you have a referral code, you won't need an MWI account number. Without one, see the MWI Account note later in this guide.

## STEP 3

# Sign the Vet-Telligence Software Contract

After submitting the MWI form, you'll get an automated email. Follow the instructions to access and sign our software contract — this is what loads your practice into the Vet-Telligence system.

### 1 Open the automated email

Sender: [noreply@formresponse.com](mailto:noreply@formresponse.com). Check your spam folder if you don't see it.

### 2 Click the contract link

The blue link in the email takes you to the Vet-Telligence software contract.

### 3 Review and sign

Complete all required fields (marked with \*) and sign electronically at the bottom. Submitting the contract loads your practice into our system.

#### STEP 4

## Register Your Email for Dashboard Access

Once the contract is signed, you'll get a second email with a link to register your email to your dashboard so you can log in.

### 1 Open the second email

This email contains the registration link for your dashboard.

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### 2 Click the registration link

This takes you to the Vet-Telligence welcome screen.

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### 3 Sign in

Register using your **Microsoft** or **Google** email. Use the same email going forward to log in.

#### STEP 5

## Access Your Dashboard

Log in and navigate to the hospital management area.

### 1 Log in

Use the Microsoft or Google email you registered with.

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### 2 Go to Manage Hospital

Select the **Manage Hospital** tab from the left sidebar.

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### 3 Open Configure Data Links

Click **Configure Data Links** on the hospital panel.

#### STEP 6

## Connect QuickBooks Online

Link your QuickBooks account so dashboards can populate with financial data.

### 1 Click QuickBooks Online

In the Configure Data Links panel, select the QuickBooks Online option.

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### 2 Log into Intuit

You'll be redirected to the Intuit login page. Enter your QuickBooks Online credentials.

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### 3 Select your company

If you manage multiple companies, choose the correct one to connect.

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### 4 Confirm the connection

Click **Connect** to finalize the link between QuickBooks and Vet-Telligence.

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**Privacy note:** The QuickBooks connection only accesses your Profit & Loss report — no other financial information is pulled.

## STEP 7

# You're Connected

Final confirmation and what happens next.

### 1 Return to Vet-Telligence

After connecting, you'll be redirected back to your dashboard automatically.

### 2 Look for the confirmation email

You'll receive an email confirming that QuickBooks Online has been linked successfully.

### 3 Allow 24-48 hours

Your data will begin flowing into the dashboards within 1-2 business days.

## Adding Users to Your Dashboard

Invite team members so multiple people can view your dashboards.

### Open Manage Hospital

Log in and go to the Manage Hospital tab.

### Copy the registration link

Click the

### Copy Registration Link

button.

### Send the link

Email it to anyone you'd like to invite. They'll click the link and register with their own email to gain access. You can invite as many people as you need.

## Important Notes

### MWI ACCOUNT REQUIRED

AllyDVM billing is processed through MWI, so an MWI Account Number is required unless you used a referral code. If you already have one, provide it on the order form and you're set.

### NO MWI ACCOUNT? CREATE ONE.

Visit [mwiah.com/open-account/create-a-veterinary-account](https://mwiah.com/open-account/create-a-veterinary-account), call (800) 896-8873, or email [newaccount@mwiah.com](mailto:newaccount@mwiah.com) for help.

### QUICKBOOKS DATA SCOPE

We only access your Profit & Loss report through the QuickBooks Online connection — no other financial data is retrieved.

# Need Help?

**EMAIL SUPPORT**

No data after 48 hours?  
**duffy@dvm.com**

**MWI PHONE SUPPORT**

For account assistance:  
(800) 896-8873

**GENERAL QUESTIONS**

Anything else:  
**info@dvm.com**