



Year-End Processes



IMPROMED®

TABLE OF CONTENTS

Year-End Reports, Backup, Advance Date	4
Impromed Year-End Procedures	4
Advance the Date	6
Stocktake (Inventory)	7
Inventory Count Sheet.....	7
Correcting Inventory Count	8
Update Prices	10
Using the Product Spreadsheet.....	10
Products, Bundle Components, and Inventory Tabs	11
Selection Options — Highlighting	11
Selection Options — Selecting	13
Actions	15
Update the Price of 1 Value when Saving	18
Reports	18
Standard Reports	18
Enhanced Reports	19
Query Reports (Communications)	20
The following searches must be run before Year-End Tool is run:.....	21
Example Search.....	22
EOY Holiday Cards	22
Communications > Search.....	23
Perform > Search	23

TABLE OF CONTENTS

- Scripting (Setup Report Lists) 24**
 - Creating a Report List 24
 - Editing a Report List..... 24

Year-End Reports, Backup, Advance Date

There are no official year-end reports in Impromed, nor is there a year-end report list. Since most of the reports in Impromed can be printed at any time, most businesses print two reports for their year-end:

- Summary Report
- Inventory Category Totals

However, feel free to print as many or as few reports as needed.

If Impromed is used to track inventory, and it is necessary to know the value of all inventory items currently in stock, be it for tax purposes or other business needs, the Inventory Category Totals must be printed on the date the fiscal year ends because this report always shows the current value of the items in stock.

Any report belonging to the financial reports category can be reprinted at any time.

Impromed Year-End Procedures

In order to close the current fiscal year in Impromed, there are four things to do on the last day of business for the year, or December 31:

1. Create a year-end folder on the primary database server.
 - a. Go to the primary database server.
 - b. Open File Explorer.
 - c. Double-click the D drive (Note: If there isn't a D drive, double-click the C drive instead, and replace D with C for all the following instructions).
 - d. In a blank area of the window, **right-click > New > Folder**.
 - e. Type **YE2022**.
 - f. Press **Enter**.
 - g. Close the window.

YEAR-END PROCESSES

2. Print or Export the Year-End reports.
 - a. Open the **Reports** module.
 - b. Expand the category **Financial Reports**.
 - c. Select the **Summary Report**.
 - d. Expand the category **Inventory Reports**.
 - e. Select the **Inventory Category Totals** report.
 - f. Verify **Print with Defaults** is **not** checked.
 - g. Click **Print**.
 - h. Enter the starting and ending dates (for the Summary Report) or select This Year.
 - i. Click **OK**.
 - j. For the Inventory Category Totals report options, select **Specific ID** for the Cost Method used during report.
 - k. Verify the other options for the Inventory Category Totals report are correct.
 - l. Click **OK**.
 - m. The Summary Report options will display. Select the options as desired.
 - n. Click **OK**.



It is also recommended that the reports be exported to the YE2022 folder as well, in case the reports are needed in the future.

3. Create and save the IBU (Impromed Backup) file.
 - a. From the Windows Start menu, open **Impromed > Support Tools**.
 - b. In Support Tools, click on the database to be backed up (generally this is called Infinity or Impromed).
 - c. Click the **Backup** button.
 - d. Click ... to navigate to the folder created in Step 1.
 - e. At the bottom of SQL Server File Browser, enter the File name – **YE2022.ibu**.
 - f. Click **OK**.
 - g. Select the option **Backup as COPY_ONLY**.
 - h. Click **Backup**.
 - i. When the message appears that the backup is complete, close the messages.

YEAR-END PROCESSES

- j. Next, verify the backup.
 - k. In Support Tools, click **Verify a Backup**.
 - l. Click the browse button (...).
 - m. Navigate to the folder where the backup was saved.
 - n. Click on **YE2022.ibu**.
 - o. Click **OK**.
 - p. Click **Contents**.
 - q. Click **Verify Item 1**.
 - r. When the message reads **The backup set is valid**, click **OK**.
 - s. Close all screens.
 - t. In the event the backup set is invalid, run the backup and verify a second time. If the backup is still invalid, contact Customer Support at 855-478-7920.
4. Run the Year-End Procedures. The Year-End Procedures will affect the YTD Totals Sales, YTD Total Referrals, and YTD Total Visits. Running this update will reset the fields to zero.
- a. From the Ribbon, click **Tools > Year-End Procedure**.
 - b. Set the current fiscal year (i.e. 2022).
 - c. Set the next fiscal year begins date (i.e. enter Jan 01, 2023).
 - d. Click **OK**.
 - e. Click **OK**.

Advance the Date

If your business is set up to auto-advance the date, you may skip the steps below.

- ◇ Open Impromed.
- ◇ Advance the date to the first business day of the New Year.
- ◇ Close Impromed.

Stocktake (Inventory)

Inventory Count Sheet

Report Options are:

- **Practices** - Allows operators to print a single business. A business is defined as a unique business entity within the Impromed database. When Impromed has multiple businesses, the first business created with the database is the master (#0). Each business generated after the initial business is a subsequent business (starting at #1). The master has full control over everything in all businesses, but certain items do have business level controls available to them, or multiple businesses, if necessary.
- **Print By** - Prints the listing by:
 - ◇ **Inventory Item** - Sorts by the inventory items selected in alphabetical order of the inventory name.
 - ◇ **Vendor** - Groups inventory by the vendor and then sorts the items for that vendor in alphabetical order.
 - ◇ **Storage Location** - Groups inventory by the storage location and then sorts the items for that location in alphabetical order.
 - ◇ **Inventory Category** - Groups inventory by the category and then sorts the items for that category in alphabetical order.
- **Name Range** - Selects a range or all inventory items.
- **Only print items available at this practice** - Prints items available based on the selected business(s).

Inventory Count Sheet

Practices

ImproMed
 ImproMed Equine

Select All Clear Selection

Print By

Inventory Item
 Vendor
 Storage Location
 Inventory Category

Name Range

Starting Name:
3V Large/Giant 60-Ct

Ending Name:
Zubrin 50mg (Tepoxalin)

Only print items available at this practice.

OK
Cancel
Preview
Setup Printer
Save Defaults

Correcting Inventory Count

1. From the Ribbon, go to the **Business** tab > **Inventory** > **Adjustments** tab > select the item to be adjusted.
2. Select storage location with stock and edit the **New Quantity On Hand** in grid.

If you currently show multiple lots with stock on hand, you can make it match your physical shelf by setting how much is in the open bottle (lot ID), and how much is in a full bottle—each with matching expiration dates (top or newest lot will be the highest lot ID number). Impromed should be set to pull from oldest lot first.

Lot ID	Received Date	Qty Received	Qty On Hand	New Qty On Hand	Unit Cost	NDC Number	Expiration Date	Manufacturer Lot #	Adjustment Notes
4	08/08/2018	500.00	500.00	500.00	0.3800	-	08/08/2018		
2	10/13/2017	0.00	0.00	0.00	0.0000	-	01/01/2005		
1	10/15/2015	500.00	500.00	500.00	0.3800	-	10/15/2016		

- If you only have one open bottle on the shelf, clear all but newest lot and set quantity on hand in top lot.
- Inventory cost of stock on hand is going to multiply each lot ID's quantity times unit cost.

YEAR-END PROCESSES

- If Quantity On Hand shows a negative number in Total Quantity On Hand for Item:

The screenshot shows the 'Inventory' window in a software application. The 'Inventory Name' is 'Cephalexin 250mg', the 'Code' is 'M3035', and the 'BarCode' is 'M3035'. The 'Total Quantity On Hand for Item' is highlighted in a red box and shows a value of -15.00. The 'Total Cost Of Inventory for Item (SPID)' is \$-0.7935. The 'Storage Location' is set to 'Default Storage Location'. The 'Quantity On Hand' is 0.00, and the 'Maximum Level' is 0.00. The 'Cost Of Inventory (SPID)' is \$ 0.0000, and the 'Safety Level' is 0.00. The 'Unit of Measure' is '(Cap(s))', and the 'Reorder Level' is 0.00. The 'Controlled Substance' is 'Reorder Quantity: 0.00'. The 'Employee Adjusting this Inventory Item' is 'Manager, Practice'. The 'Lots' section shows a table with one lot:

Lot ID	Received Date	Qty Received	Qty On Hand	New Qty On Hand	Unit Cost	NDC Number	Expiration Date	Manufacturer Lot #	Adjustment Notes
1	10/13/2017	0.00	0.00	0.00	0.0000	-	01/01/20		

- ◇ You must FIRST select the storage location called **Out of Stock Bin**.
- ◇ Change the negative quantity to zero and click **Apply**. (A negative quantity on hand means you have sold more than received).
- ◇ Go to the correct storage location and set the **New Quantity On Hand**.

The grid lines for editing quantity on hand only appears after the items have been received at least once into the software. If there are no grid lines for a few items, do a receipt to create them. If there are no grid lines on most inventory items, Covetrus Software Technicians have an update to add an empty lot for adjusting.

Update Prices

Using the Product Spreadsheet

The Product Spreadsheet allows operators to modify the properties of several Products, Inventory Items, or Bundle Components at once. The instructions provided here are designed to help in the process of making mass changes to products, inventory, and bundle items. However, it is possible to go into this sheet and change items individually. Simply double-click on the item to be altered, and make the appropriate change.

Impromed also provides the Price Change Draft. This feature allows users to change prices and save them until the operators are ready to apply the changes. This is helpful when a practice wants to change a large number of prices, but not all are increased by a set percentage or dollar amount.



The Product Spreadsheet contains a **WhatIf** button designed to help you determine what effect altering your prices will have on your profit margin.

From the Ribbon:

1. Click **Invoicing** tab > **Patient Processing** (Setup) > **Products** > **Product Spreadsheet**. The Products Spreadsheet screen opens.
2. Click the tab containing the items to modify (Products, Bundle Components, Inventory).
3. Select the items to modify using the Selection Options and clicking **GO**.
4. Select the **Action** to perform to modify the selected items, then press **GO**.
5. Enter the criteria for the action selected. Click **OK**. (The selected items are modified and changes highlighted.)



If the results are not correct, at this point you can click “Cancel” to close the spreadsheet without saving changes.

YEAR-END PROCESSES

6. Click **Apply**. (The selected items are modified.)
7. Click **OK**.



If the results are not correct, but have already been made, a backup will need to be restored or the values need to be manually re-entered.

Products, Bundle Components, and Inventory Tabs

Click one of the following tabs to make alterations to the items listed:

- **Products** - Allows alterations to be made to items found under the **Invoicing** tab > **Patient Processing (Setup)** > **Products** > **Product Items**.
- **Bundle Components** - Allows operators to alter the settings for any product attached to another product **Invoicing** tab > **Patient Processing (Setup)** > **Products** > **Product Attachments**.
- **Inventory** - Allows alterations to be made to items found under **Business** tab > **Inventory (Setup)** > **Inventory Items**.



In the following steps, certain options have different names, depending on which tab is currently selected.

Selection Options — Highlighting

Before any mass changes can be made, it is necessary to select the items to change. There are several ways to accomplish this, including double-clicking on the empty box located to the left of the Code column to place a check there:

	Product		
	Code	Name	Price of 1
<input checked="" type="checkbox"/>	A924	Anesthetic Monitoring Fee - Electronic	\$ 59.40

However, performing a selection in this manner would be time-consuming when selecting multiple products. Therefore, Impromed provides several methods of quickly highlighting and selecting rows.

YEAR-END PROCESSES

Highlighting Rows

Some selection options require that rows must be highlighted to be modified. Highlighting rows and selecting rows are NOT the same thing.

Highlighted rows will appear like this:

Product		
Code	Name	Price of 1
A924	Anesthetic Monitoring Fee - Electronic	\$ 59.40
A914	Anesthetic Monitoring Fee - Manual	\$ 59.40
B2	Anesthetic/Sedation Medications	\$ 59.40
A905	Carbocaine 2%	\$ 55.00
A909	Epidural	\$ 55.00
A904	Induction - IV	\$ 59.40
A911	Inhalant - Isoflurane 30 Minutes	\$ 59.40
A910	Inhalant - Isoflurane 60 Minutes	\$ 59.40
A913	Inhalant - Isoflurane 60 Minutes Addec	\$ 59.40

A selected row or rows will have a check mark in front of it.

Product		
Code	Name	Price of 1
✓	A924 Anesthetic Monitoring Fee - Electronic	\$ 59.40
✓	A914 Anesthetic Monitoring Fee - Manual	\$ 59.40
✓	B2 Anesthetic/Sedation Medications	\$ 59.40
✓	A905 Carbocaine 2%	\$ 55.00
✓	A909 Epidural	\$ 55.00
✓	A904 Induction - IV	\$ 59.40
✓	A911 Inhalant - Isoflurane 30 Minutes	\$ 59.40
✓	A910 Inhalant - Isoflurane 60 Minutes	\$ 59.40
✓	A913 Inhalant - Isoflurane 60 Minutes Addec	\$ 59.40

To highlight a row or series of rows for selection:

- Click on a row.
- Click on a row and drag the mouse to highlight multiple rows.
- Click on a row, hold down the shift key, then click another row. (This selects both rows and all the rows found between the two clicked rows.)

YEAR-END PROCESSES



You can sort lists according to the values of any column by clicking the column heading. The list will toggle between ascending and descending order. This is especially helpful for grouping all selected items. Clicking in the column heading above the checkbox will group all selected items.

Selection Options — Selecting

Select Rows

1. Choose one of the following Selection Options from the drop-down menu.
2. Click **GO**.

Select ALL Rows

This will select every row on the currently visible spreadsheet. For example, if the Products tab is clicked, all items on that sheet will be selected.

Select Rows (Custom)

When the option to select custom rows is selected, the following dialog box opens:

Custom Selection of Rows

Column: Product Name Operation: Begins with

Search Value:

DeSelect Select Close

- Select a **Column** from the drop-down menu. Every column on the spreadsheet is listed.
- Select an **Operation** from the drop-down menu.
 - ◇ **Begins with** - Column information begins with this information. When searching the Product Category, for example, the word Food will find a column named Food, but not a column called Diet Food or Science Diet Food.
 - ◇ **Includes** - Searches the entire column. When searching the Product Category, for example, the word Food will find a category named Food, as well as any categories called Diet Food or Science Diet Food.
 - ◇ **Is greater than** - Finds all items larger than the entered value - i.e. if a 0 is entered here, everything larger than 1.00 will be found.

YEAR-END PROCESSES

◇ **Is less than** - Finds all items smaller than the entered value - i.e. if a 0 is entered here, everything smaller than 1.00 will be found.

- Enter a **Search Value**.
- Press **Select**.
- Click **Close**.

Select Highlighted Rows

This will select every highlighted row.

Deselect ALL Rows

This will deselect every row on the currently visible spreadsheet. For example, if the Products tab is clicked, all items on that sheet will be deselected.

Deselect Highlighted Rows

This will deselect every highlighted row.

Example:

You plan to raise the price of all foods by 10%. Column would be Product Category. Operation would be 'Includes', which will allow you to select every food, whether the category is Special Food, Food, or Diet Food. Search Value would be Food. Clicking Select would choose all Food items. On the opposite end of the spectrum, if you planned to raise prices on all items except food, you would first choose Select ALL Rows, then go to Select Rows (Custom). Operation would be Includes, which will allow you to select every food, whether the category is Special Food, Food, or Diet Food. Search Value would be Food. Clicking deselect would clear all Food items, while leaving all other items selected.

YEAR-END PROCESSES

Actions

Once rows are selected, prepare to make mass alterations.

1. Choose one of the **Actions** from the drop-down menu.
2. Click **GO**.

Find Products

Finding Products is the one “exception to the rule” of selection. It is designed to help locate individual items and then select or deselect them.

Example: This may be useful if you have 50 Science Diet foods, but only want to select 20 of them for a price change.

1. Select a **Column** from the drop-down menu. Every column on the spreadsheet is listed.
2. Select an **Operation** from the drop-down menu.
 - ◇ **Begins with** - Column information begins with this information. When searching the Product Category, for example, the word Food will find a column named Food, but not a column called Diet Food or Science Diet Food.
 - ◇ **Includes** - Searches the entire column. When searching the Product Category, for example, the word Food will find a column named Food, as well as any columns called Diet Food or Science Diet Food.
 - ◇ **Is greater than** - Finds all items larger than the entered value - i.e. if a 0 is entered here, everything larger than 1.00 will be found.
 - ◇ **Is less than** - Finds all items smaller than the entered value - i.e. if a 0 is entered here, everything smaller than 1.00 will be found.
3. Enter a **Search Value**.
4. Press **Find**.
5. Click **Toggle Selection** to select or deselect the highlighted item.
6. Repeat steps as necessary.
7. Click **Close**.

Change Dollar Amounts



This is the most frequently used Action, as it is used to raise prices. However, because it is frequently used, it is also frequently misused — especially when raising prices by a percentage. Please take extra care when using this function. Read the instructions completely, as well as the provided example.

1. Select the **Available Dollar Columns** to change.
2. Choose one of the Available Actions from the drop-down list.
 - ◇ **Set the value to a fixed amount** - The value entered in Adjustment Value is entered into the checked Available Dollar Column(s). If the original dollar amount in the selected column is \$3.00, and the Adjustment Value is \$5.00, the value of the selected column will become \$5.00.
 - ◇ **Add a fixed dollar value to the existing value** - The value entered in Adjustment Value is added to the checked Available Dollar Column(s). If the original dollar amount in the selected column is \$3.00, and the Adjustment Value is \$5.00, the value of the selected column will become \$8.00.
 - ◇ **Multiply existing value by the following value** - The value entered in Adjustment Value is multiplied by the checked Available Dollar Column(s). If the original dollar amount in the selected column is \$10.00, and the Adjustment Value is 1.5000, the dollar value of the selected column will become \$15.00.
 - ◇ **Set the value equal to the value in the following column** - The value from the column listed in the Adjustment Value is entered into the checked Available Dollar Column(s). Select Minimum Price in the Available Dollar Columns, and Base Cost from the Adjustment Value drop-down, the Base Cost of the selected items will be copied into the Minimum Price column - i.e. if the Base Cost was \$3.00, and the Minimum Price was \$5.00, the Minimum Price will become \$3.00.
3. Enter an **Adjustment Value**.
4. Click **Apply**.
5. Click **OK**.

YEAR-END PROCESSES

Example:

Let's say you wish to raise the prices of all your foods by 10%. Once all your foods have been selected, in the Available Dollar Columns, you would check off EVERY item, with the exception of Base Cost, Minimum Price, and Packaging Fee. (Packaging Fee and Minimum Price can be selected, but this is optional. Most veterinary businesses adjust minimum and packaging fees separately from their regular prices.)

Next, choose the Additional Actions of Multiply existing value by the following value. The Adjustment Value would be 1.1000. You would then click Apply.



When raising prices by a percentage, be sure to enter the Adjustment Value as 1 point percentage - i.e. 10% = 1.1000, 12% = 1.1200, 25% = 1.2500.

Change Markup Values

1. Select the Available Markup Columns to change.
2. Choose one of the Available Actions from the drop-down list.
 - ◇ **Set the Markup to a fixed value** - The value entered in Adjustment Value is entered into the checked Available Markup Column(s). If the original markup in the selected column is 3.0, and the Adjustment Value is 5.0, the value of the selected column will become 5.0.
 - ◇ **Add a fixed value to the Markup** - The value entered in Adjustment Value is added to the checked Available Markup Column(s). If the original markup in the selected column is 3.0, and the Adjustment Value is 5.0, the value of the selected column will become 8.0.
 - ◇ **Multiply existing value by the following value** - The value entered in Adjustment Value is multiplied by the checked Available Markup Column(s). If the original markup in the selected column is 10.0, and the Adjustment Value is 1.5, the dollar value of the selected column will become 15.0.
3. Enter an **Adjustment Value**.
4. Click **Apply**.
5. Select Skip Products if Base Cost = \$0.00, if necessary. This prevents items with a Base cost of \$0.00 from having their markup multiplied by zero - which would result in a zero price.
6. Click **OK**.

Update the Price of 1 Value when Saving

Selecting this option causes your Price of 1 value to automatically add the low price and packaging fee for each product and place this total in the Price of 1 column of each product when the Apply button is pressed.

Reports

Standard Reports

- **Summary Report** – Total production, revenue and income.
- **Inventory Category Totals** – Total Inventory on Hand, Cost of Goods Sold, (live number, print at end of year, before new year starts).
- **Product Analysis Report** - Most products sold, Sales YTD.
- **Product Category Totals Report** – Total production by category.
- **Employee Summary Report** – Production per Employee in Qty, Gross and % of Gross.
- **Employee Net Report** – Production per Employee showing Net Income.
- **Employee Commissions Report** – Shows employee commissions during a selected time frame. Two reports are available, AR Based and Products Invoiced Based.
- **Inventory Count Sheet** – Used to help with count of Inventory on the Shelf.
- **Inventory Item Listing** – Used to help with count of Inventory on the Shelf.
- **Price Listing Report** – Shows prices of all products.
- **Product Discount Report** – Shows Discounts given used in a selected date range.
- **Product Listing Report** – Shows prices of all products.
- **Product Details Report** – Shows inventory markup.
- **Products Stored** – Products not yet concluded, still stored.
- **Product Analysis Report** – Sales YTD.
- **Products Invoiced by Client Report** – Customer's transactions and totals sales for the year or in a given time frame, Sales YTD.

YEAR-END PROCESSES

- **Products Invoiced Report** – Sales YTD.
- **Write Offs Report** – Shows Write Offs performed during a selected time frame.
- **Client Revenue Report** – Best customers by dollars spent.
- **Summary Aged Trial Balance** – Total AR on Account at End-of-Year.

Enhanced Reports

- **Top Products Sold by Instance** – Displays list of products sold for the date range selected, sorted by the number of times they were invoiced (instance).
- **Top Products Sold by Net** – Displays list of products sold for the date range selected sorted by the net total.
- **Top Products Sold by Quantity** – Displays list of products sold for the date range selected sorted by quantity invoiced.
- **Top Products Sold by Revenue** – Displays list of products sold for the date range selected sorted by revenue.
- **Revenue (New Clients)** – Displays total revenue attributed to New Clients (first visit date within the year selected).
- **Revenue (Repeat Clients)** – Displays total revenue attributed to Repeat Clients (clients who visited more than once during the same years).
- **Revenue (Returning Clients)** – Displays total revenue attributed to Returning Clients (clients with a visit date in the selected year and in the previous year).
- **YTD Totals for All Clients in a Specific Year** – Displays YTD totals by client for the selected year (must have run the End-of-Year tool for every year).
- **YTD Totals for a Specific Client and Year** – Displays YTD totals for the selected client for the selected year (must have run the End-of-Year tool for every year).
- **Inventory Category Details** – This report displays the current quantity and total unit cost for each inventory category then is broken down by inventory item and lot.

Query Reports (Communications)

The Communications module provides a powerful set of tools to build queries for searching client/patient database. A database is defined as the collection of all information related to the operation of the veterinary business; including clients, patients, accounts receivable, product and inventory lists, records, and provides a variety of tools to view the results. Search results can be used to create several different types of correspondence and reports. For instance, search details can be used to create postcard reminders, various client letters, and reports based on customized formulas. VetPressOnline and HealthyPet® (Vetstreet®) are a couple of integrations available with the Communications module. Along with using these features, Impromed also provides a compliance log to determine how many clients return with their patients to keep their vaccinations and other pertinent medical histories updated. Another option is to schedule communications such as emails, letters, or postcards. Some of these communications are saved within the communication history.

Information available for performing searches includes: client and patient database fields, patient reminders, products sold to patients, client/patient invoices, appointments, and boarding reservations. Search results can be extracted using the following formats: emails, labels, letters, postcards and reports. They can also be exported for external uses.

The Communications module allows for each of these items to be customized:

- Search details
- Labels
- Letters
- Postcards
- Reports
 - ◇ Templates
 - ◇ Formula and Formula Items
- Export Details
- Emails
 - ◇ Templates
 - ◇ Topics
 - ◇ Address books
 - ◇ Options
 - ◇ Blocked recipients

YEAR-END PROCESSES

The following searches must be run before Year-End Tool is run:


- **EOY All Active Clients** — All active clients who have been in the clinic since a specific time and have a living, active patient. Sorted by Client Last Name, Client First Name.
- **EOY All Inactive Client** — All clients who have not been in since before a certain date. Sorted by Client Last Name, Client First Name.
- **EOY Client Clean Up Search** — All clients who have not been in since before a certain date or are inactive. Sorted by Client Last Name, Client First Name.
- **EOY Year to Date – Referrals** — All active clients, with an active, living patient, who have had more than a specified number of referrals in the past year. Sorted by YTD Referrals, Client Last Name, Client First Name. Run this search before running **Tools > Year End Procedure**.
- **EOY Year to Date Sales** — All active clients with living, active patients that have spent over a certain dollar amount in the past year. Sorted by YTD Total Sales, Client Last Name, Client First Name.
- **EOY Year to Date – Sales by Zip Code** — All active clients with living, active patients that have spent over a certain dollar amount in the past year. Sorted by Zip Code, YTD Total Sales, Client Last Name, Client First Name.
- **EOY Year to Date – Visits** — All active clients with active, living patients who have had more than a certain number of visits in the past year. Sorted by YTD Total Visits, Client Last Name, Client First Name.
- **EOY Holiday Cards** — All active clients, with an active living patient, that have spent over a specified dollar amount, this year. Sorted by Client Last Name, Client First Name, Client First Name.


YEAR-END PROCESSES

Example Search

EOY Holiday Cards


Communications, Perform Search, Search Details (Criteria, Output and Sort Order tabs).


Search Definition: 


Description:
All active clients, with an active living patient, that have spend over a specified dollar amount, this year. Sorted by Client Last Name, Client First Name. 

Criteria

(Table	Field	Operator	Table or 'Value'	Field or value)	And/Or	^
	Client	YTD Total Sales	>=	(Value)	500.00		And	
	Client	Active	=	(Value)	Yes		And	
	Patient	Active	=	(Value)	Yes		And	
	Patient	Deceased Date	=	(Value)				

*EOY Holiday Cards 

Description:
All active clients, with an active living patient, that have spend over a specified dollar amount, this year. Sorted by Client Last Name, Client First Name. 

Items to include in output: 

- Client
- Patient
- Reminder

YEAR-END PROCESSES

Search Definition:
 *EOY Holiday Cards

Description:
 All active clients, with an active living patient, that have spend over a specified dollar amount, this year. Sorted by Client Last Name, Client First Name.

Criteria | Output Items | **Sort Order**

Table	Field	Order
Client	Last Name	Ascending
Client	First Name	Ascending

Insert Row(s) | Delete Row(s)

Allow user to change values when searches using this definition are performed
 Allow user to update reminder counts for search results performed using this definition
 Prompt for compliance log information when printing or exporting a search result performed using this definition
 Show required information

UK
Cancel
Apply
Mode:
 View
 Edit
 Create
Copy
Delete

Communications > Search

Search to Perform:

Search Definition	Description
*EOY Holiday Cards	All active clients with an active living patient, who have spent over a specified doll
*EOY Year to Date Sales	All active clients with an active living patient, who have spent over a specified doll
*EOY Year to Date Sales by Zip	All active clients with an active living patient, who have spent over a specified doll
*EOY Year to Date Referrals	All active clients, with an active, living patient, who have had ore than a specified

Perform > Search

History...

Comment for This Search Result:

Perform Search | Close

Once the search is performed, reports, labels, postcards, emails can be generated.

Scripting (Setup Report Lists)

Group different types of reports into report lists. By selecting a report list, operators can print multiple reports as a set, instead of having to select and print each report individually, such as grouping the Daily, Monthly and Year-End Reports.

Report lists are set up using the Setup Report Lists dialog box.

Creating a Report List

1. From the **Business** tab, choose **Reports**.
2. On the right side of the screen, click **Setup Lists**. The Setup Report Lists dialog box opens.
3. Click **Create** mode. The mode status color changes to green and all fields are cleared.
4. Enter a name for the report list.
5. Select the reports to include in the list.
6. Click **Apply** to save the new report list and keep the dialog box open, or click **OK** to save the report and close the dialog box.

Editing a Report List

1. From the **Business** tab, choose **Reports**.
2. On the right side of the screen, click **Setup Lists**. The Setup Report Lists dialog box opens.
3. Click **Edit** mode.
4. If necessary, edit the name of the report list.
5. Click the check box next to each report to include as part of this report list.
6. When finished editing the report list, click **Apply** to save the changes and keep the dialog box open, or click **OK** to save the changes and close the dialog box.

Report Lists can be copied or deleted as well.