Year End Processes

Best Practices Guide

PULSE ®

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FREQUENTLY ASKED QUESTIONS

Frequently Asked Questions related to End of Year Processes

Do I have to do anything in Pulse to "close" out the year?

There are no official reports or processes in Pulse that must be completed in order to start the new fiscal year.

However, you may want to run certain reports to gather necessary information for tax purposes, inventory levels and pricing, as well as client engagement.

What tools or reports are available in Pulse for year-end reporting?

There are several report options to accomplish the following:

Client Engagement

- Client Report
- Inactive Client Report

Billable Items Management

- Inventory Report
- Usage Report

Sales and Account Reconciliation

- Sales Report
- Account Receivables Report

What do I need to know about year-end processes with lab integrations or QuickBooks®?

Lab Integrations:

Lab item costs do not automatically update from third parties. Manual updates are required.

Quickbooks® Online:

Year-end tasks in QuickBooks® Online are separate from Pulse. No reset needed in Pulse; integration continues as usual. Consult QuickBooks® or your accountant for guidance.

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TABLE OF CONTENTS

Holiday Preparation

Identify Top Spenders of the Year

The **Client Report** can be used to generate a list of clients and the amount spent (ordered by amount spent highest to lowest) to gather a list of your top spenders. This can be used to send mass holiday letters or loyal client offerings.

When generating a new report, use the following filters:

1. **Amount Spent Date Range**: Enter beginning of the year to end of year in the range boxes.
2. **Only Include Clients with Email**: Check this if you wish to send emails to the generated clients.
3. **Include Active**: Check this if you only wish to return top spending clients whose profile is Active.

Learn how to run this report.

Email Holiday Greetings and Practice Closure Reminders

Email Templates in Pulse can be used to create holiday newsletters, practice closure reminders, and more. The **Client Report** can then be run to distribute the email to all or selected clients.

1. To create newsletters from a PDF, you must save it as an image file. Use a photo editing software to resize the image file (no wider than 800 pixels, regardless of height).
2. Once you have resized your images and saved them to your computer, you can upload them into an email template in Pulse.

Learn how to create an email template.

Use a Label Printer to generate Client Address Labels

Client address labels can be generated from the **Client Report** in Pulse, exported into a spreadsheet, then imported into the DYMO Label™ software.

This report will export as an .xls file, and may require a software like Excel to view the file.

Learn more on this task.

Block the Calendar for Holiday Closures

Office closures can be designated as an **Appointment Type** and then scheduled directly on the Calendar of your practice page. When viewing the calendar in Resource View, you may create a **Calendar Resource** designated as “Closed” to schedule holidays in advance.

[Learn how to create blocks on the calendar.]

Year End Reporting

Obtain Tax and Sales Totals

You can run the **Sales Report** in any date range to generate the total income your practice has processed in Pulse. Use the following filters to obtain Total Sales: **Date Range**, **Cash Summary**, **Tax Summary.**

Report runs can take longer depending on the volume of transactions, and the date range used. When selecting the Breakdown filter, run the report in monthly date ranges.

Locate Overdue Balances and Credits

The **Account Receivables Report** can be run to generate totals on past due balances and credits. To view the entire amount due, deselect the **Use Date Range** filter, and set the **Invoice Age** to **All.**

[Learn how to run this report.]

Perform Inventory Counts

The **Inventory Report** can be run and then exported into a spreadsheet to assist you in performing manual inventory counts. This report will generate a snapshot of your current inventory details such as **On Hand Quantity**, **Expriation Dates**, **Location** and more.

An Inventory Report will automatically be scheduled to generate in your practice to record the on-hand inventory for the first day of the new year.

[Learn how to run this report.]

Identify Top Selling Billable Items and Categories

Both the **Sales Report** and the **Usage Report** can be ran to display the top items sold, depending on your specific reporting needs.

- The **Usage Report** is designed for smaller date selections, specific billable item types, and the ability to factor in paid or unpaid items. This report can also retrieve results based on patient species.
  - → Use the **Show Totals** filter to view the items by code, name, and total quantity.
- The **Sales Report** is best suited for larger date ranges and ***only*** retrieves results based on paid status. Additionally, the Sales Report allows you to include all practices if they are grouped together.
  - → Use the **Item Sold Summary** filter to view items sold by item category, code, name, the current cost of the item and amount spent on that item.

Both reports should be exported to a spreadsheet and sorted by the Total column to identify the top-selling items.

Learn how to run each of these reports.

Report on Rabies Certificates

The **Usage Report** can also create a single file containing all rabies certificates that were produced from vaccinations ordered and administered during a specific time period. This report can be ran by county, listed under the Client Information filter.

→ To obtain this list, include the filters: **Date Range**, **Show Totals**, and **Show Transactions**.

The selected billable item(s) need to have the vaccine setting "Create Rabies Certificate" enabled for the certificates to be generated.

Learn how to generate multiple rabies certificates.

Client and Patient Record Management

Locate Lost or Inactive Clients

The **Inactive Client Report** will generate a list of active clients who have not visited or made a payment within a specific timeframe. This can help you manage client retention efforts and accurate record keeping.

The **Client Information** filters are optional and only require a date to retrieve a list of all active clients who have values *before* the entered date. When the report generates, all filters will be represented as data columns.

- Use the **Last Payment Date** filter to see all active clients without a payment made in 6 months.
- Use the **Last Visit Date** filter to see all active clients without an existing appointment scheduled in the last 12 months.
- Use the **Date Created** and **Last Payment Date** filters to see newly created clients without any activity.

Learn how to configure and run this report.

Print Treatments and Charges by Individual Patient

The Patient Medical Record includes a Patient Charges Report that will generate a list of all items ordered, date of treatment and paid status. This can be exported to a PDF or spreadsheet to provide to the client.

Learn how to run this report.

Write Off Uncollectable Account Balances

First, identify accounts that are unlikely to be collected. Then, use the payment type **Write Off** to directly process unpaid or remaining balances. This payment type is set to **Exclude from Income Calculations on Sales Report** by default.

Print Treatments and Charges by Client

You can access the client's profile to select View History, which will redirect you to the Payment History page. The History Filter section should be expanded to select date ranges, and update the view. This can then be printed or emailed to provide to the client.

Learn how to run this report.