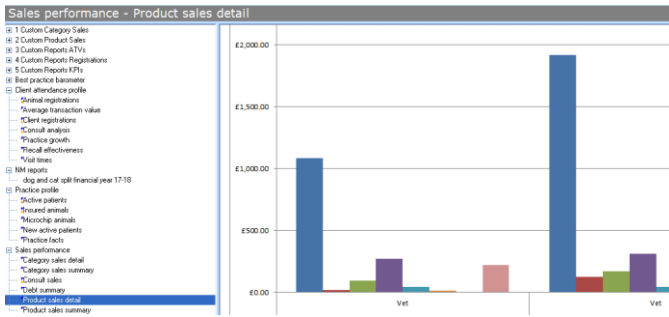


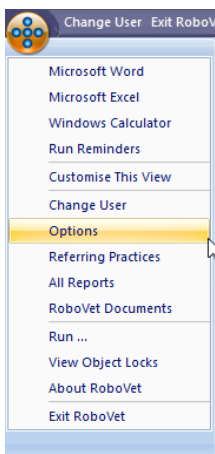
# Back on Track – Business Barometer

RoboVet

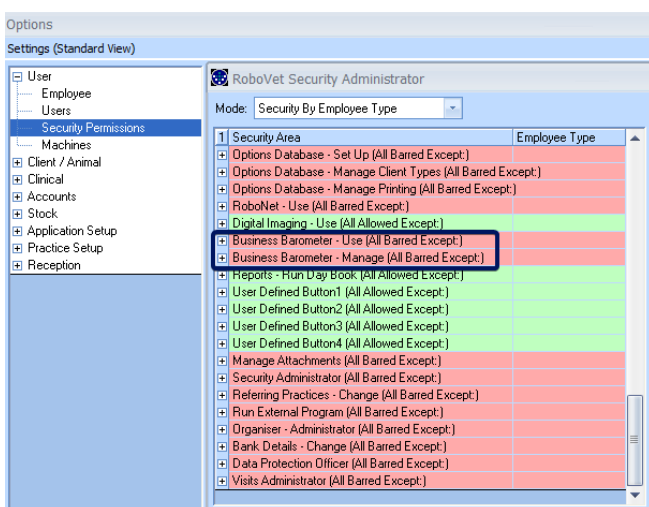




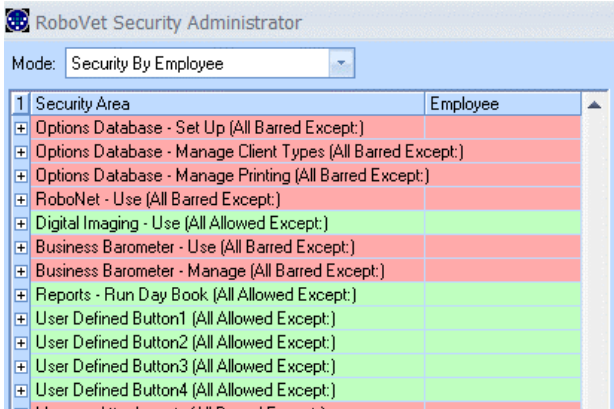
- This guide will show you how to use Business Barometer in RoboVet.
- Business Barometer is an incredibly powerful tool if used correctly for practice management.
- It utilises Pivot tables in Excel to deliver consistent reporting over time and trends for both sales and client reporting
- Excel must be installed on each practice server where business barometer is to be viewed.
- This may just be one server per practice if all branches connect in remotely



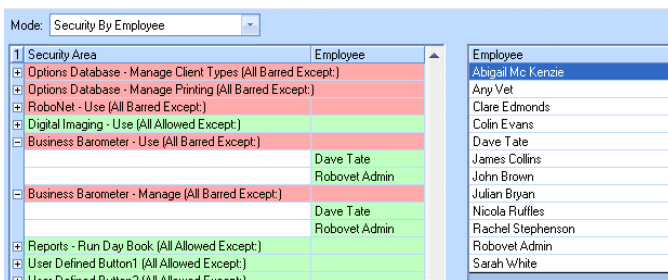
- There are two security settings which control who can see and who can manage the business barometer.
- These are accessed by using the Robovet button in the top left-hand corner, then selecting **options**.



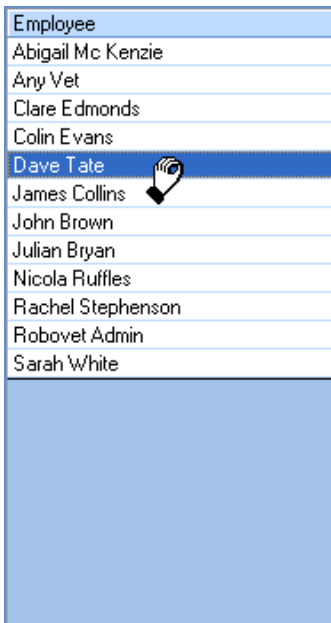
- Click **Security Permissions**.
- Scroll down to the bottom of the list of options to see two entitled **Business Barometer**.
- **Business Barometer – Use (All Barred Except)** users need to be in this permission to be able to see and access Business Barometer.
- **Business Barometer – Manage (All Barred Except)** users who create the reports and manage the setup need to be in here.



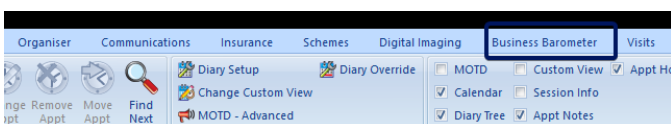
- Expand the sections using the + and add in users or employee type depending on your system configuration.



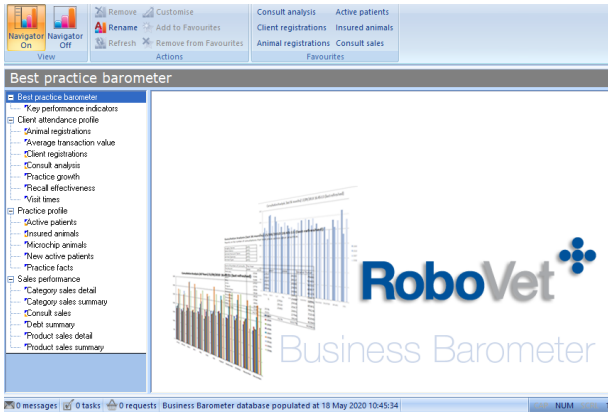
- Users who are not in the permission will be displayed on the right-hand side.



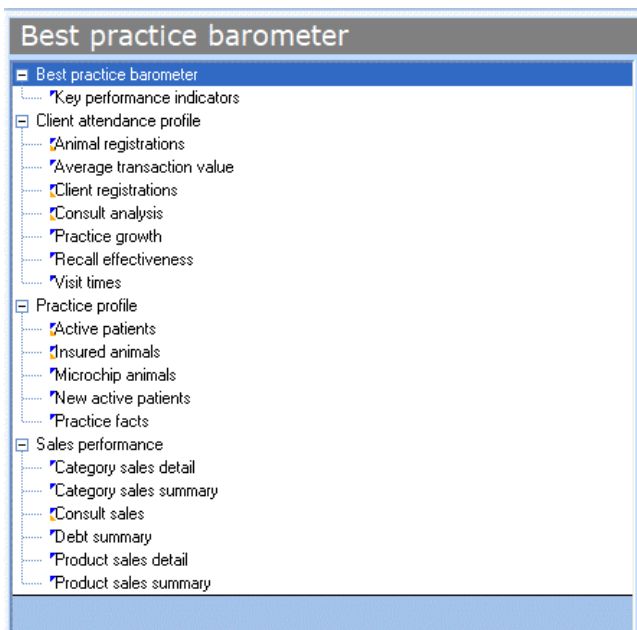
- Click and hold on the user you wish to add into the permissions area, you will see a hand symbol which can drag the user in to the open boxes.



- Once the permissions have been set, the **Business Barometer tab** will become active.
- Click the **Business Barometer** tab.



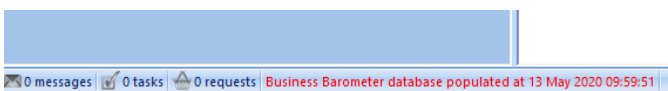
- The Business Barometer screen is split into two key areas.
- The **Report Navigator** on the left-hand side, details any pre-set reports along with user created ones



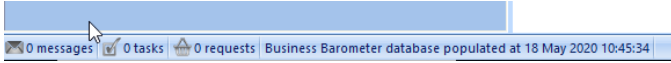
- A blue arrow denotes a Robovet standard report and the down arrow next to a report denotes it as a favourite in the navigator.
- These are grouped into four main sections by default.
- **Best practice Barometer** – Standard Robovet KPI's.
- **Client attendance profiles** – pre-set client reports.
- **Practice profile** – looking at practice growth and active patients.
- **Sales performance** – product and services sales, in summary or more detailed formats.



- The right-hand side of the screen shows the **Report Preview** of any report which is selected from the navigator.



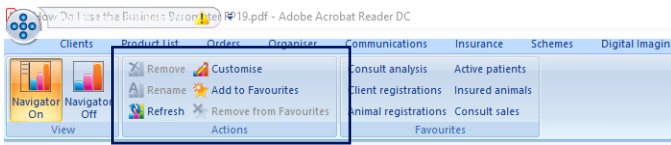
- The bottom of the screen shows details of when the database was last updated.
- It will be red if it's not been updated for more than 24 hours.



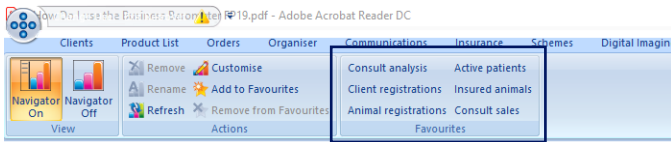
- It will be blue if it is up to date.



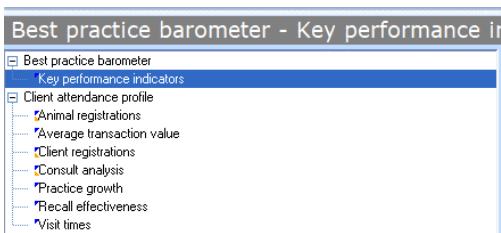
- The toolbar is split into 3 groups.
- The **View** section allows the user the ability to turn the navigator on or off by selecting one of the options (this is always on by default).



- The **Actions** section has various options such as renaming and removing reports, customising an already created report and adding or removing from favourites.



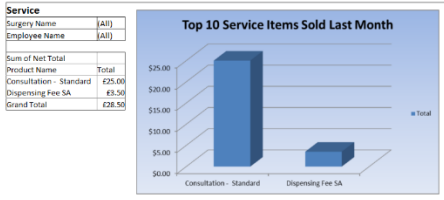
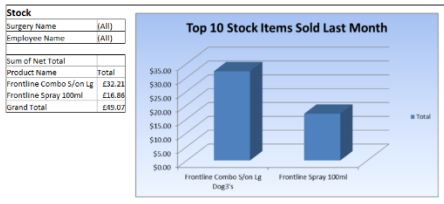
- **Favorite** reports are stored and displayed on the ribbon bar for quick access.
- Any user with view permission for Business Barometer can set a report as one of their favourites.
- This is per individual logged in user.
- The default options show six key reports, but this can be altered up to a maximum of nine per individual user.



- On the **Navigator** view the first section is for a standard suite of reports that are shipped with Robovet for looking at KPI's for the practice.



- If you click on the key performance indicators choice the preview window will change to display the list of these reports and a description of why they may be used.
- Each report can be accessed in its standard form by selecting it from the tab's options beneath the list.



Menu | Diary Time Utilisation | Appointment Analysis | Forward Diary Planning | Top 10 Items Sold | Average Transaction Value | Sales Revenue | Recall Et

- For example, click on the top 10 items sold, a preview of those items that were the highest revenue items in the previous month split into stock and service items will appear.
- This give a good overview if required for key areas without the need to create or customise.

## Key Performance Indicators

Look inside your practice and see clearly how effectively it is operating.

**Diary Time Utilisation** - Looking back over the last 12 months, of the time available for appointments in your practice diary, how this time utilised today? Take a look at the percentage of time available when clients failed to attend, clients cancelled, the practice rescheduled or there was just not booked. By looking these percentages you can determine your own utilisation rate and how to increase it.

**Appointment Analysis** - Looking back over the last 12 months, of the appointments made in your practice diary what percentage did clients actually attend? What percentage did clients fail to attend or cancel? How many did you have to reschedule.

**Waiting Room Analysis** - Looking back over the last 12 months, of the appointments made in your practice diary, how long have your patients had to wait, how long have they been in reception and how long have they had to wait for their appointment?

**Forward Diary Planning** - Looking forward for the next eight weeks, how much of your available diary time is booked? Is it enough, and what can you do to improve your forward planning?

**Top 10 Items Sold** - Last month what were your top 10 items generating revenue and stock items? This is based on the net sales value of individual items sold as either parent products or items within POS actions.

**Sales Revenue** - Over the last 12 months how has service and stock revenue changed? How does this compare with your monthly target? This is based on the Net sales value of additional items sold over and above your standard practice or service (POS) items.

**Average Transaction Value** - Over the last 12 months what has been the average transaction value within your practice? This is based on the net value of transactions. A transaction is a consultation that is not an (S)MARE, (R) SALE or (R) or (U)MARE SALE.

**Recall Effectiveness** - Over the last 12 months what has been the effectiveness of your recall? Of the results, for each month what percentage have been checked?

**Practice Growth** - Over the last 12 months how many new patients have you gained each month? This is new animal registrations minus patients that have died or moved away.

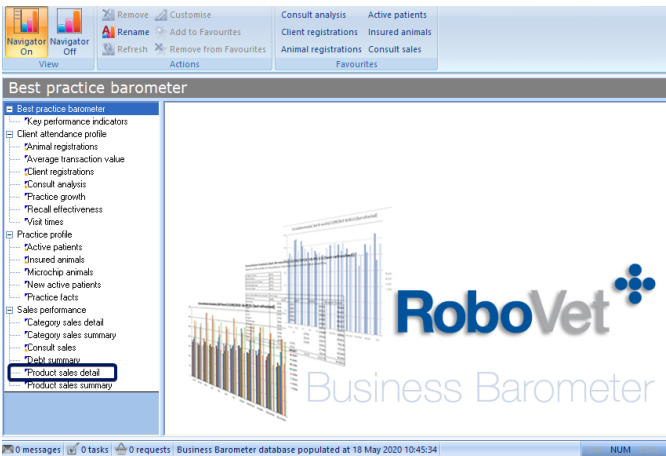
**Patient Activity** - How active are your patients?

**Patient Visits** - How many visits do clients usually spend when they come to the practice and how often do they visit? Over the last 12 months what is the average for recall and the average number of consultation per patient.

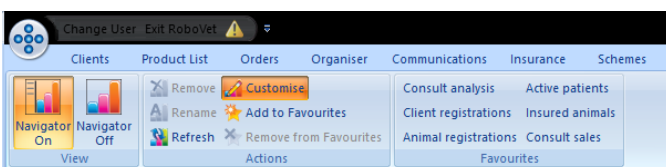
**Scheme Membership and Growth** - Over the last 12 months how many patients are on your scheme. How many new members and renewals and how many have moved away.

Menu | Diary Time Utilisation | Appointment Analysis | Forward Diary Planning | Top 10 Items Sold | Average Transaction Value | Sales Revenue | Recall Effectiveness | Practice Growth | Patient Activity | Patient Visits | Scheme Membership | Scheme Growth

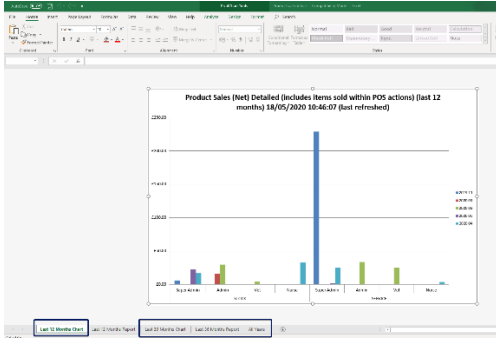
- It is recommended to leave the standard KPI reports alone and not customising those but instead, create new and customised reports in the other group sections.
- The KPI reports are a good overview of standard reporting areas within Business Barometer however when you create your own layouts and reports you can get a lot more in-depth knowledge of your practice.



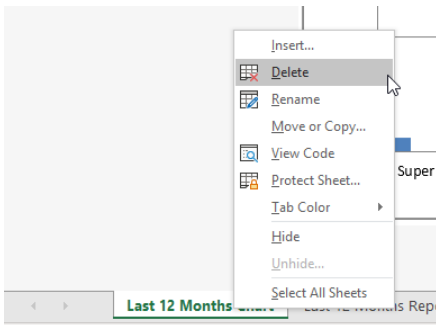
- To create your own report and layout for sales of an individual product from the list of reports in the left-hand window select product sales detail from the sales performance group.
- This will report on all NET sales including all those within POS actions.



- Click on **Customise** in the Actions section on the ribbon bar.



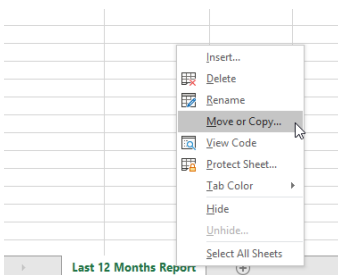
- Excel will open with the previous data from the stored report, we are going to delete some of the existing tabs on the bottom except for the called last 12months report.
- Save this report as a new version for 'Advocate' and the previous report will be untouched so you can safely delete these unrequired tabs.



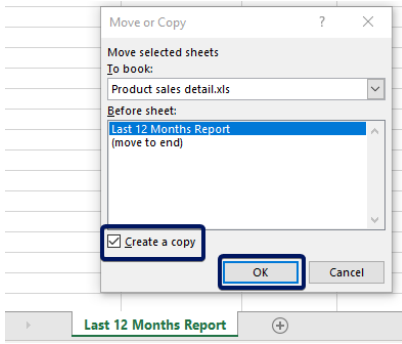
- Right click on the any all the tabs except the **last 12months report** and click **Delete**.

Year	2020-01	2020-02	2020-03	2020-04	Grand Total
STOCK	5.77	27.57	96.86	43.15	173.35
STOCK Service	29.8	43.22	5.1	33.21	111.34
STOCK Total	35.57	70.79	101.97	76.36	284.69
SERVICE	13.34	25	3.5	3.5	45.34
SERVICE Total	13.34	25	3.5	3.5	45.34
Grand Total	48.91	95.79	105.47	79.86	329.03

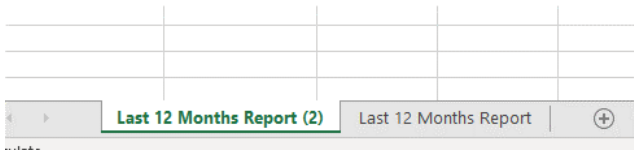
- You will now be left with one excel tab and the details on the screen as shown.
- Until you get used to Business Barometer and the pivot tables I would recommend making a copy of the remaining tab so you can always refer to it or start afresh if required.



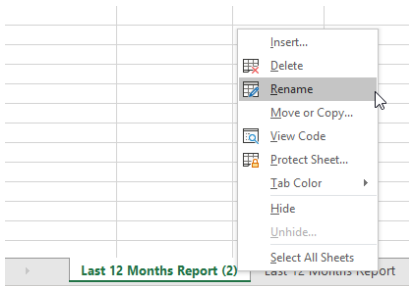
- To **Copy**, right click on the tab and select the move or copy option.



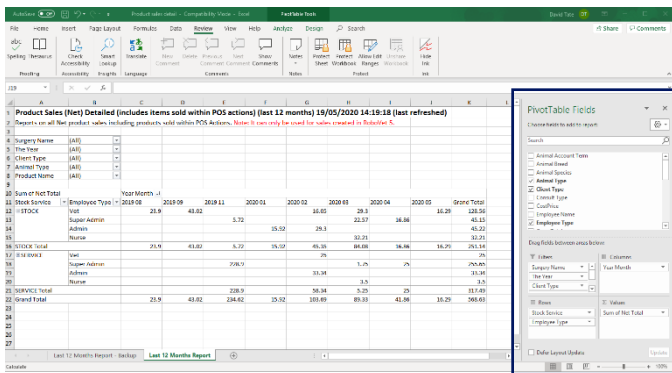
- You should now only have one report to copy as we have already deleted the others so highlight and tick create a copy and click **OK**.



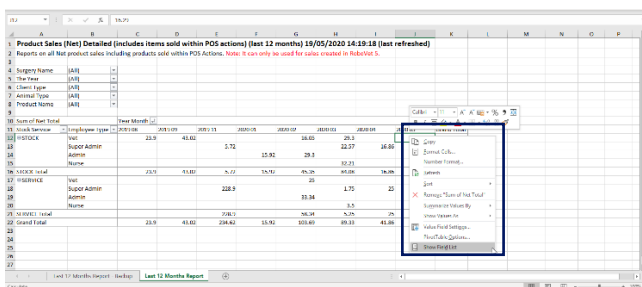
- You will now have both the original and copy version of the report.



- You can rename by right clicking and selecting **Rename** if required to ensure you are happy with the one you are working on.
- We will delete one of the versions once we are finished with the layout of the new report and charts.



- We are now going to look at editing the row and columns data to display the report in different layouts.
- The displayed report can be edited by first clicking anywhere on the table to bring up the list of PivotTable Fields
- The pivot table fields are split into row and column along with filters as per your requirements.



- If you accidentally close this field section down, right click anywhere on the table itself and select the bottom option to view field list.



	A	B
1	<b>Product Sales (Net) Detailed (incl</b>	
2	Reports on all Net product sales includi	
3		
4	Surgery Name	(All) ▾
5	The Year	(All) ▾
6	Client Type	(All) ▾
7	Animal Type	(All) ▾
8	Product Name	(All) ▾
9		

- We are first going to look at selecting the product we want to search for sales on, in this example Advocate.
- Click the drop down for product name and tick the select multiple options.

	A	B
1	<b>Product Sales (Net) Detailed (incl</b>	
2	Reports on all Net product sales includi	
3		
4	Surgery Name	(All) ▾
5	The Year	(All) ▾
6	Client Type	(All) ▾
7	Animal Type	(All) ▾
8	Product Name	(All) ▾
9	Search	
10	<input checked="" type="checkbox"/> (All)	
11	<input checked="" type="checkbox"/> Advocate XI Dog 40 25-40k 3 pipe	
12	<input checked="" type="checkbox"/> Advocate XI Dog 40 25-40kg 6 pip	
13	<input checked="" type="checkbox"/> Advocate Med Dog 40 4-10k 6 pip	
14	<input checked="" type="checkbox"/> Batch Spay 10-25kg	
15	<input checked="" type="checkbox"/> Consultation - Standard	
16	<input checked="" type="checkbox"/> ACP Inj 2mg/ml	
17	<input checked="" type="checkbox"/> Injection Fee	
18	<input checked="" type="checkbox"/> Select Multiple Items	
19	<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
20		
21		
22	Grand Total	

- This now allows each item to be selected individually or in group name by typing the key world in the search box

	A	B
1	<b>Product Sales (Net) Detailed (incl</b>	
2	Reports on all Net product sales includi	
3		
4	Surgery Name	(All) ▾
5	The Year	(All) ▾
6	Client Type	(All) ▾
7	Animal Type	(All) ▾
8	Product Name	(All) ▾
9	Advocate	
10	<input checked="" type="checkbox"/> (Select All Search Results)	
11	<input type="checkbox"/> Add current selection to filter	
12	<input checked="" type="checkbox"/> Advocate XI Dog 40 25-40k 3 pipette	
13	<input checked="" type="checkbox"/> Advocate XI Dog 40 25-40kg 6 pipett	
14	<input checked="" type="checkbox"/> Advocate Med Dog 40 4-10k 6 pipett	
15	<input checked="" type="checkbox"/> Advocate Sml Cat 40 <4kg 3 pipette	
16	<input checked="" type="checkbox"/> Advocate Sml Cat 40 <4kg 6 pipette	
17	<input checked="" type="checkbox"/> Advocate Lge Cat 80 4-8kg 3 pipette	
18	<input checked="" type="checkbox"/> Select Multiple Items	
19	<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
20		
21		
22	Grand Total	

- In the search box type in the product or service name you want to view – i.e. Advocate.
- This will automatically hide all other items not matching the search criteria.
- Click **OK** when done which will now update the report to only show sales of these items.

Surgery Name	(All) ▾
The Year	(All) ▾
Client Type	(All) ▾
Animal Type	(All) ▾
Product Name	(All) ▾

- You may now also notice that the drop-down arrow for product name has changed. This is displaying that the information in the selection is part of a filtered list

1 Product Sales (Net) Detailed (includes items sold within POS actions) (last 12 months) 19/05/2020 14:19:18 (last refreshed)										
2 Reports on all Net product sales including products sold within POS Actions. Note: It can only be used for sales created in RoboVet 5.										
3										
4	Surgery Name	(All)								
5	The Year	(All)								
6	Client Type	(All)								
7	Animal Type	(All)								
8	Product Name	(All)								
9										
10	Sum of Net Total	Year Month								
11	Stock Service	Employee Type	2019 08	2019 09	2019 11	2020 01	2020 02	2020 03	2020 05	Grand Total
12	STOCK	Vet	23.9	43.02	0	15.92	29.3	8.15	16.29	124.46
13		Super Admin								8.15
14		Admin			15.92	29.3				45.22
15	STOCK Total		23.9	43.02	0	15.92	41.25	37.45	16.29	177.83
16	Grand Total		23.9	43.02	0	15.92	41.25	37.45	16.29	177.83
17										

- Your displayed report may look something like this now, but this is only showing sales totals for all years for and for all employee types.
- We need to now look at adjusting the layout to suit what we want to achieve from the report.

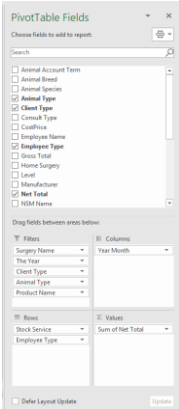
Surgery Name	(All)									
The Year	2020									
Client Type	(All)									
Animal Type	(All)									
Product Name	(All)									
Sum of Net Total	Year Month									
Stock Service	Employee Type	2020 01	2020 02	2020 03	2020 05	Grand Total				
STOCK	Vet		11.95	29.3	16.29	57.54				
	Super Admin			8.15		8.15				
	Admin	15.92	29.3			45.22				
STOCK Total		15.92	41.25	37.45	16.29	110.91				
Grand Total		15.92	41.25	37.45	16.29	110.91				

- Firstly, with the options already on the report, amend the year of the data by changing **the year** tab and selecting the current year.
- This will instantly filter out any sales not matching the year selected.

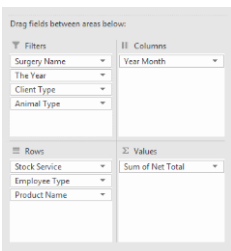
- You can also select individual months sales that correspond to the selection by adjusting the year month drop down.
- As a caveat here we have selected to view only 2020 sales, in previous example and although the tick boxes for 2019 are ticked here they are already filtered out in the main filter for the year so will not be displayed unless that year itself is selected.

Surgery Name	(All)									
The Year	2020									
Client Type	(All)									
Animal Type	(All)									
Product Name	(All)									
Sum of Net Total	Year Month									
Stock Service	Employee Type	2020 01	2020 02	2020 03	2020 05	Grand Total				
STOCK	Vet		11.95	29.3	16.29	57.54				
	Super Admin			8.15		8.15				
	Admin	15.92	29.3			45.22				
STOCK Total		15.92	41.25	37.45	16.29	110.91				
Grand Total		15.92	41.25	37.45	16.29	110.91				

- So, we know we have selected Advocate as our product line however that is still not shown on the display.
- We need to move some of the filter options around into the rows and columns to display the data as we expect.



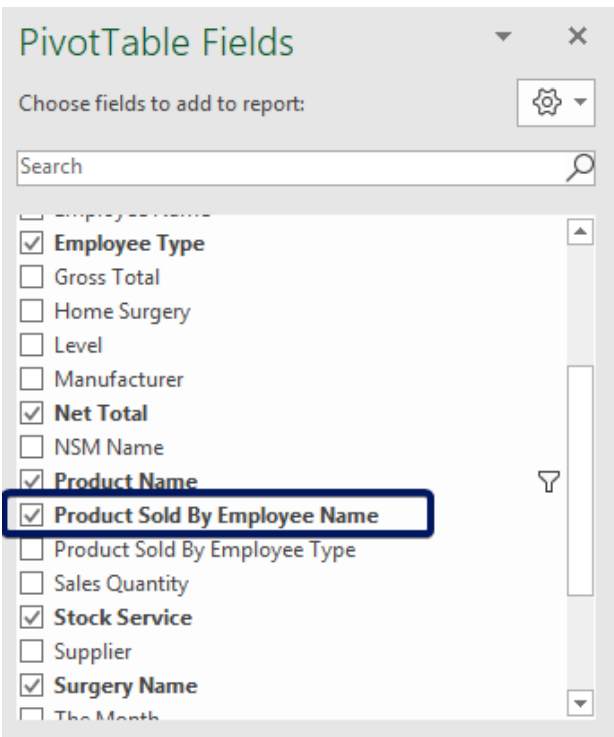
- On the right hand pivotable fields areas there are areas for filters, columns, rows and values.
- These correspond to the areas as displayed on the report.



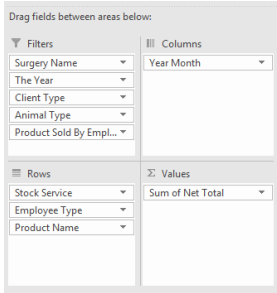
- If we select product name and click and drag it to the row fields the report will change.

Sum of Net Total	Employee Type	Product Name	Year Month	2020 01	2020 02	2020 03	2020 05	Grand Total
STOCK	Vet	Advocate Xl Dog 40 35-40k 3 pipette		11.95				11.95
		Advocate Sml Cat 40 +4kg 6 pipette			29.3			29.3
		Advocate Lge Cat 80 4-8kg 3 pipette				16.29		16.29
	Vet Total			11.95	29.3	16.29		57.54
	Super Admin	Advocate Lge Cat 80 4-8kg 3 pipette				8.15		8.15
	Super Admin Total					8.15		8.15
	Admin	Advocate Sml Cat 40 +4kg 6 pipette		15.92				15.92
		Advocate Sml Cat 40 +4kg 6 pipette			29.3			29.3
	Admin Total			15.92	29.3			45.22
STOCK Total				15.92	41.25	37.45	16.29	110.91
Grand Total				15.92	41.25	37.45	16.29	110.91

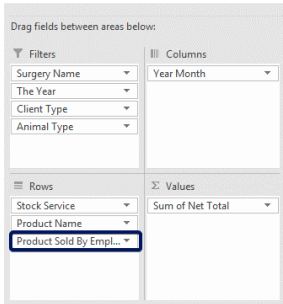
- The products are now all listed in row format with each item split into the months they had been sold.



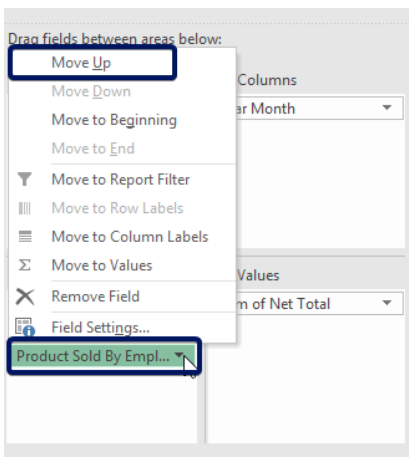
- We can start to change the layout to show the individual user who sold the items.
- We can do this by selecting the option in the pivot table list called **product sold by employee name** and clicking the tick box.
- Do not get confused by the employee name option that is further up the list as for sales this is the person who created the visit entry but is not necessarily the same person who charged the work.
- For example, you may create one visit transaction for a day patient but numerous users log their work during the day for treatments or procedures given under their own logins so that would show the sales as being with the user.



- You may find this goes straight into the filters section of the fields as shown.
- If you are wanting to look at individual employee sales the drop down will allow this for comparison.



- If it does, click and drag to the rows box to show on the report display.



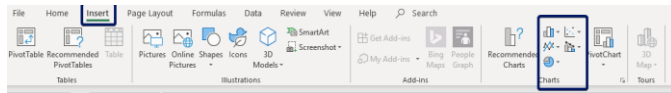
- You can also adjust the order of the rows and columns which will directly reflect in the layout.
- For example, moving the product sold by employee up by one level by left clicking on the arrow and selecting move up.

Sum of Net Total	Product Sold by Employee Name	Product Name	Year Month				Grand Total
STOCK Service			2020 01	2020 02	2020 03	2020 05	
=STOCK	=Dere Tate	Advocate Lge Cat 80-8-8kg 3 pipette				8.15	8.15
	=Sarah White	Advocate Smi Cat 40-44kg 6 pipette				29.3	29.3
	=SuzanneTitch	Advocate 9l Dog 40-25-40kg 3 pipette		11.95			11.95
		Advocate Smi Cat 40-44kg 3 pipette	15.92				15.92
		Advocate Smi Cat 40-44kg 6 pipette			29.3		29.3
		Advocate Lge Cat 80-8-8kg 3 pipette				16.29	16.29
STOCK Total			15.92	41.25	37.45	16.29	110.91
Grand Total			15.92	41.25	37.45	16.29	110.91

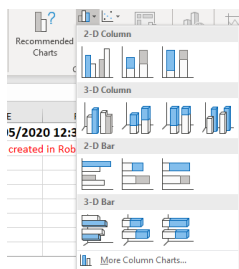
- The display report now shows the employee name first then the product name as per the order in the rows section.
- The drop downs for product sold by employee name and product name allow further fine tuning of the data so have a go and see what you can create on your own layout for staff or products.

Sum of Net Total	Year Month	2020 01	2020 02	2020 03	2020 05	Grand Total
STOCK						
Dave Tate	Advocate Lge Cat 80 4-8kg 3 pipette				8.15	8.15
Sarah White	Advocate Sml Cat 40 <4kg 6 pipette			29.3		29.3
SUPERTECH	Advocate XI Dog 40 25-40k 3 pipette		11.95			11.95
	Advocate Sml Cat 40 <4kg 3 pipette	15.92				15.92
	Advocate Sml Cat 40 <4kg 6 pipette		29.3			29.3
	Advocate Lge Cat 80 4-8kg 3 pipette			16.29		16.29
STOCK Total		15.92	41.25	37.45	16.29	110.91
Grand Total		15.92	41.25	37.45	16.29	110.91

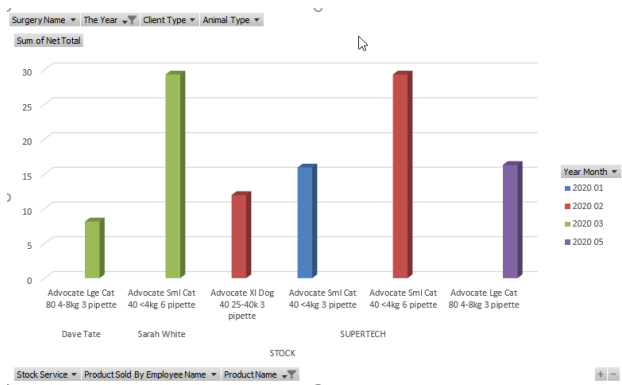
- Once you have the layout and data you like with results you would expect it is you can create detailed graphs and reports.
- Highlight the data in the report as shown.



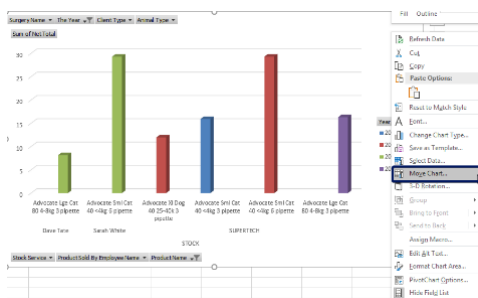
- Once you have this highlighted click the insert option in the ribbon bar and then select one of the charts.



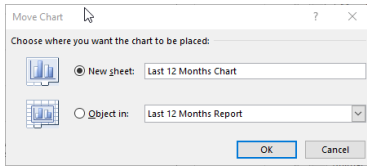
- If you hover over each chart option a preview of the chart will appear on screen.
- This can be a useful way to decide on a layout that works for the report data.



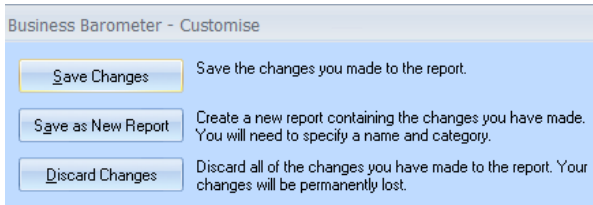
- We have selected the **3-D Clustered Column** for this report
- This view will be displayed on your current spreadsheet.
- This can be moved to a new tab and renamed.
- To do this right click on the chart and select **Move chart**.



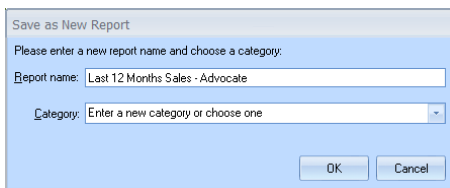
- Rename as a new sheet and it will appear as part of the report on the tab area.



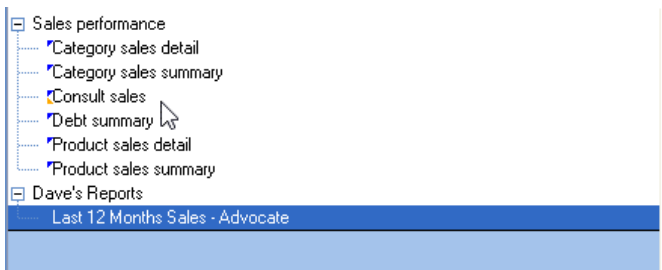
- Any changes to the report or chart will be reflected in both tabs now that you have created the layouts and chart.



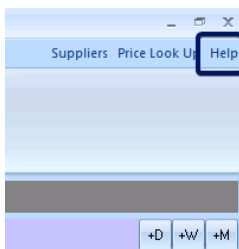
- Once you are happy with the charts and reports they can be saved by closing the report using the cross and selecting save.
- You will be presented with these options.



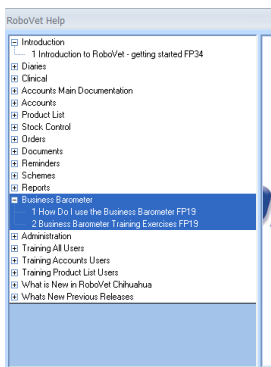
- Select **Save as New Report** and give it a name.



- If a category is not selected, then you have the option to create your own for future reference and ease of.



- For further information or knowledge on Business Barometer, we have some in-built help guides in RoboVet.
- These can be found from any screen and selecting **Help** from the top right-hand side.



- You will find guides and training exercises here to help enhance your knowledge and understanding of business barometer.