

## Back on Track – Recovering Lost Revenue

RoboVet



Settings (Standard View)			
😑 User	Abigail Mc Kenzie	Required Info	rmation
Employee	Any Vet	Username:	Abigail Mc Kenzie
Users	Colin Evans	Full name:	Abigail McKenzie
Security Permissions	Dave T	Fuil name:	Abigali McKenzie
Machines	Ed	Qualifications:	MRCVS
Elient / Animal     Elient / Animal	Fiona Dawe		
🗉 Clinical	James Collins	← Passwords &	Reports
Accounts	Jim Smith	You are using	Employee Codes to login. You do not n
Stock	Joanna M	Employee coo	le: sneezu Passv
Application Setup	John Brown	Employee coo	e. sneezy Passy
Practice Setup	Molly J	Benott securi	v level: Medium 🖃
Reception	Nicola Ruffles	. Toport social	

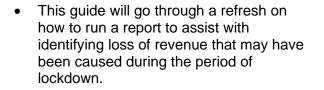
Change User Exit Robo

enti

Microsoft Word

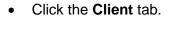
Microsoft Excel Windows Calculator Run Reminders Customise This View Anonymise Clients Change User Options All Reports RoboVet Do

> Run . View Object Locks About RoboVet Exit RoboVet



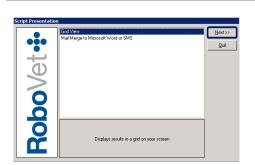
- Ensure that the user running this report has a security level of Medium.
- Click the RoboVet icon and select All • Reports.

Client Products Sold And Not Sold	Reports on clients that have been sold selected products but not sold other selected products. (SMS enabled)
Data Protection Report	Report on Data Protection and when personal information was last checked
List Appointments	Allows you to report on appointments within your practice.
List Clients	Lists Client information (SMS enabled)
List Referring Practices	Allows you to report on all Referring Practices and Referring Vets.
List Scheme Members	Allows you to report on scheme memberships and renewals (SMS enabled)



- Select Client Products Sold and Not • **Sold.** (This should be highlighted by default)
- Double click the report or click Run. •







- A list of options will appear. •
- <u>F</u>inish •••• Client Type (\*) Client Alerts Debt Sevenity (\*) Icheme Member << <u>B</u>ack Home Surgery (\*) Animal Type (\*) Animal Species (\*) C Animal Species (\*) Animal Age (\*ALL AGES\*) Clients Inactive (No) Deceased Animal Sales (No) Include Sales Information (No) oduct Sale Selection lowed to be Sent Mark tina Text Mes CONTINUE The product sales selection is the Finish -• Client Type (\*) Client Alerts minimum required to have some data << Back Debt Severity (\*) Scheme Membership produced in a report, filtering the options Home Surgery (\*) will give a more detailed targeted report. Animal Type (\*) Animal Species (\*) Animal Age (\*ALL AGES\*) Clients Inactive (No) Deceased Animal Sales (No) Include Sales Information (No) Product Sale Selection Allowed to be Sent Marketing Text Messages (Yes.No) CONTINUE • • Change Include Sales Information to <u>F</u>inish Client Type (\*) show the descriptions of the items in the Client Alerts << <u>B</u>ack report. Debt Severity (\*) Scheme Membership Home Surgery (\*) This is useful when including more than • Animal Type (\*) Animal Species (\*) one type of product in filters screen. Animal Age (\*ALL AGES\*) Clients Inactive (No) Deceased Animal Sales (No) For example, all pack sizes of a product • Include Sales Information (No) or versions of a medication that could be Product Sale Selection used for any certain condition. Allowed to be Sent Marketing Text Messages (Yes.No) Double click. • Select Yes. Select . No Cancel The Includes Sales Information has CONTINUE • -<u>F</u>inish Client Type (\*) Client Alerts now been changed. << <u>B</u>ack Debt Severity (\*) Scheme Membership Home Surgery (\*) Animal Type (\*) Animal Species (\*) Animal Age (\*ALL AGES\*) Clients Inactive (No) Deceased Animal Sales (No) Include Sales Information (Yes) Product Sale Selection Allowed to be Sent Marketing Text Messages (Yes.No)

st Product Sa



- Scheme Membership is another valued filter to use as this will show clients who have purchased items on a scheme and have not returned for repeated sales.
- Double click Scheme Membership.
- Click **Select Members** and then choose whether they are a member of a scheme or not.
- Click Schemes.
- Choose which schemes you want to be included on the report then click **Next.**

List Product Sales Filters Home Surgery (\*) Animal Type (\*) • <u>F</u>inish ••• Animal Species (\*) << <u>B</u>ack Animal Age (\*ALL AGES\*) Clients Inactive (No) Deceased Animal Sales (No) Ċ Include Sales Information (Yes) Product Sale Selection Allowed to be Sent Marketing Text Messages (Yes,No Allowed to be Sent Marketing Email (Yes,No) Robo/ Allowed to be Sent Marketing Post (Yes,No) Has Email (Yes,No) Has Mobile (Yes,No) • Finish entering filters

CONTINUE

**Client Alerts** 

Client Type (\*)

Debt Severity (\*)

Scheme Members

Home Surgery (\*) Animal Type (\*) Animal Species (\*)

Animal Age (\*ALL AGES\*)

Allowed to be Sent Marketing Text Messages (Yes.No)

Select Members (Members, Non-Members)

50% sales Discount

Healthy Pet Club Vaccination for Life Internet Farm Drugs Stock 10% Services 5% Guide Dogs Surcharge for slow payers

Long Term Medicine Breeder Discount New Scheme 11 Sell stock at Cost Services 50% Discount

😭 MultiSelect

Schemes (\*ALL SCHEMES\*)

Clients Inactive (No) Deceased Animal Sales (No) Include Sales Information (Yes) Product Sale Selection

CONTINUE

•••

m

1 object(s) selected

•

<u>F</u>inish

<< <u>B</u>ack

Next>>

<< <u>B</u>ack

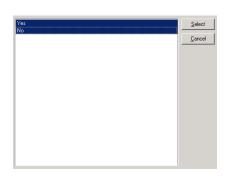
Next>>

<< <u>B</u>ack

- Other options that should be used to filter the report are the marketing preferences.
- If sending by email, double click Allowed to be set Marketing Email.



• Select Yes.



Home Surgery (*)	-	<u>F</u> inish
Animal Type (*)		
Animal Species (*)		<< Back
Animal Age (*ALL AGES*)		
Clients Inactive (No)		
Deceased Animal Sales (No)		
Include Sales Information (Yes)		
Product Sale Selection		
Allowed to be Sent Marketing Text Messages (Yes, No)		
Allowed to be Sent Marketing Email (Yes)		
Allowed to be Sent Marketing Post (Yes,No)		
Has Email (Yes)		
Has Mobile (Yes,No)		
	-	

• Do the same for the Has Email filter.

Home Surgery (*)	Finish
Animal Type (*)	
Animal Species (*)	<< Back
Animal Age (*ALL AGES*)	
Clients Inactive (No)	
Deceased Animal Sales (No)	
Include Sales Information (Yes)	
Product Sale Selection	
Allowed to be Sent Marketing Text Messages (Yes, No)	
Allowed to be Sent Marketing Email (Yes)	
Allowed to be Sent Marketing Post (Yes,No)	
Has Email (Yes)	
Has Mobile (Yes,No)	

• If you would like to filter by a specific animal, double click **Animal Species**.

Animal Speci	es	
	*Feline	<u>0</u> K
Robo/et.	Enter Animal Species to report on clients only with animals of this species	Cancel

CONTINUE	
CONTINUE	<u>F</u> inish
Client Type (*)	
Client Alerts	<< <u>B</u> ack
Debt Severity (*)	
Scheme Membership	
Home Surgery (*)	
Animal Type (*)	
Animal Species (*Feline)	
Animal Age (*ALL AGES*)	
Clients Inactive (No)	
Deceased Animal Sales (No)	
Include Sales Information (Yes)	
Product Sale Selection	
Allowed to be Sent Marketing Text Messages (Yes, No)	
Specify the animal age Animals with an unknown DOB are not included ("ALL AGES")	

- Type the species into the box.
- An \* in front of the name will search for any combination of those letters in the species name.
- If you are setting the age of the animal, note that the age is for the current date, not the date at the time of the sale.



- Pick a starting age.
- Months Days Years 00 Cancel Lowest animal age to include (youngest) OK Pick a maximum age that you want to • Years Months Days <u>C</u>ancel see. Highest animal age to include (eldest) CONTINUE Client Type (\*) Client Alerts Debt Seveily (\*) Scheme Membership Home Surgey (\*) Animal Type (\*) Animal Species (\*feline) Animal Species (\*feline) Animal Species (\*feline) Clientet Inactive (No) Include Sales Information (\*es) Product Sale Selection Aloved to be Sent Marketion Tex <u>F</u>inish -The age range is for the current date. If • << Back you want to include animals who were 10years, but you're looking at sales 6 months ago then ensure the age range is 10 yeas 6 months, otherwise it would only list animals up to a maximum 9 Allowed to be Sent Marketing Text Messages (Yes, No) years and 6 months. Specify the animal age Animals with an unknown DOB are not included (00.00.00 to 10.00.00) Select the Product Sale Selection CONTINUE CONTINUE Client Xleye (\*) Client Xleyts Debt Sevenity (\*) Scheme Membership Home Surgery (\*) Animal Type (\*) Animal Age (00.00.00 to 10.00.00) Clients Inacture No) -Einish • << <u>B</u>ack option and click Finish. Clients Inactive (No) Deceased Animal Sales (No) Include Sales Information (Yes nuoue clares information (Yes) Product Sale Selection Illowed to be Sent Marketing Text Messages (Yes, No) ducts Sold S × The selection screen by default, shows • Available Products
  Lab Charges: Kidney Lilline Profile
  5 Dirn Hillicoub
  Achronoyno Dirn 33
  Achonyon Dirn 33
  Achonyon Dirn 33
  ACP Hai Tolmay
  ACP Taka Zang
  ACP May Dirahana
  ACP Taka Zang
  Actoryl Drobate
  Achonale Inge Achonyon Dirn 1000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonyon 11000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonyon 11000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonyon 11000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonyon 11000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonyon 11000
  Achonalege 100 For Dogs 45
  Achonale Inge Achonal ailable Products all products in your database. **\_** ₩ 01/04/2020 ▼ Add > Add All >> Remove < 30/04/2020 💌 These are a mix of stock and service • Remove All << items displayed in alphabetical order. Not Sold Fron In the Product Filters section, choose • Add > ♥ 01/04/2020 ▼ the stock or service options and you can Add All >> То Remove < 30/04/2020 💌 enter an individual product name as Remove All << needed. -Product Filters Service and Stock
   Product Name C Service C Stock Clear <u>F</u>ilter OK Cancel

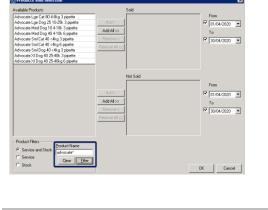
<u>0</u>K

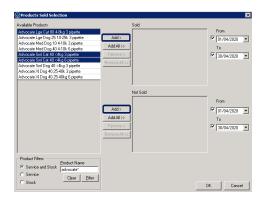


- Enter a product name in the box and click filter to display the items you want to search for.
- Once **Filter** is clicked the list will instantly hide all items that don't match.

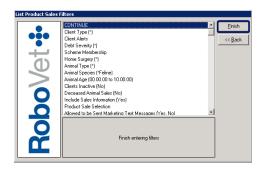
 Highlight the items you want and click
 Add to transfer them into both the Sold and Not Sold sections.

- You can add or remove items as you need to. The sections do not need to match.
- Change the dates for both sections.
- In this example, it's looking for all sales between 1<sup>st</sup> January and 31<sup>st</sup> March 2020 and who has not been back and repeated the sales from 1<sup>st</sup> April till 19<sup>th</sup> May.
- Click OK.
- Once all your filters are set, highlight **Continue** and click **Finish.**





vailable Products		Sold	
Advocate Lge Dog 25 10-25K 3 pipette Advocate Med Dog 10 4 10k 3 pipette Advocate Med Dog 40 4 10k 6 pipette Advocate Med Dog 40 4 40 g spette Advocate 31 Dog 40 25-40k 3 pipette Advocate 31 Dog 40 25-40k 3 pipette	Add > Add All >> Remove < Remove All <<	Advocate Lge Cat 80 4-8kg 3 pipette Advocate Sml Cat 40 <4kg 3 pipette Advocate Sml Cat 40 <4kg 5 pipette	From ✓ 01/01/2020 ▼ To ✓ 31/03/2020 ▼
	Add > Add All >> Remove < Remove All <<	Not Sold Advocate Lge Cat 00 4-8kg 3 pipette Advocate Smi Cat 40 <4kg 3 pipette Advocate Smi Cat 40 <4kg 6 pipette	From 01/04/2020 To Fo Fo Fo Fo Fo Fo Fo Fo Fo F
Product Filters		ſ	OK Cancel





- This will display the report.
- Clients Sold Products 01/01/2020 to 31/03/2020 And Not Sold Products 01/04/2020 to 19/05/2020 Hide any unwanted columns by right-• File Display Edit clicking the column and selecting Hide Last Name First Name Title Company N Postcode Client Type C Total Column Column. Andrew Jean Mrs 3 Equine , | Hide Column Collins James Mr 3 Equine Li Clients Sold Products 01/01/2020 to 31/03/2020 And Not Sold Products 01/04/2020 to 19/05/2020 File Display Edit
  ClentD Title First Name Last Name Animal Name Home Phone
  Last Name Screentiny 01472 084903 • Change the order of the columns by mobile n Date clicking and holding the top of the 
   07666666666
   01/01/2020
   14:52:00
   Advocate
   Smi Cat 40 <4kg 3 pipette</th>

   0781111111
   11/02/2020
   15:01:00
   Advocate
   Smi Cat 40 <4kg 6 pipette</td>
   Mrs Jean Andrew Seren Mr James Collins Bitsy column and drag it to the new location. Clients Sold Products 01/01/2020 to 31/0. • To save the layout of the report, click File Display Edit Export > Ani File then Save Format. Print Print Preview... Print Selected... Print Preview Selected.. Page Setup... Printer Setup. Save Format... Load Format... Load Format From File. Exit Save Format Name the report something which will be . Items Sold - Telephone List DT Name memorable and give it a description. Description Report contains telephone numbers only ОK Cancel Clients Sold Products 01/01/2020 to 31/0: To load the report format, click File then • File Display Edit Export Load Format. Print... Print Preview. Print Selected... Print Preview Selected. Page Setup... Printer Setup... Save Format... Load Format... L Load Format From File Exit Load Format Choose the desired format and click OK. ОΚ Cancel Report contains telephone numbers only



- To print the report, click File then Print.
- The report can be exported to a CVS file for further analysis.

- Once the report has been run and exported then closed, you will be presented with the following options.
- You can **run** the report again if you need to change any filters.
- **Save** report allows you to store the report using the format presented in the preview.
- Give the report a suitable name.
- Add a description and ensure to add a note to change the dates.
- Ensure to tick Save a format with these choices.



ОК

Cancel

Clients Sold Products 01/01/2020 to 31/03/2020 And Not Sold Products 01/04/2020 to 19/05/2020

To Text File...

To Excel Spreadsheet..

To Comma Separated File (CSV)...

ultation Date

File Display Edit

Export

Print...

Exit

Save Choices

Description

Name

End Report Choice

Exit Report

Run Report Again

Save Report Choices

Advocate Sales Cat

use this report to check for missing repea

Save a format with these choices

Report contains telephone numbers only

Print Preview.

Print Selected... Print Preview Selected... Page Setup... Printer Setup... Save Format... Load Format... Load Format From File...



- The saved report will then be shown below the original report by clicking on the +.
- To report on an individual scheme, click **Schemes** in the ribbon bar.
- These can be Schemes that can be chargeable or not.
- Any item billed to a client or patient on a scheme is stored in this useful report.



- Select the Scheme you wish to view.
- This will default to the current animal selected.
- To show all animals, click All Clients.

- This will display the grid view of all clients matching that scheme.
- Select the client you want to view and click on Scheme Usage in the View tab.
- The Scheme Usage pop-up will appear. It shows what the client has used from their scheme.
- The benefits are detailed along with the limits on items or services.
- The mount of discount given is also displayed.
- The **Consultation date**, **time** and **items** are displaye in date order.
- The savings are useful to explain to any clients who may be thinking of leaving the scheme due to lack of use, on how much they have already saved.
- To give a copy of this report to a client, hold CTRL and the Print Screen key on your keyboard.
- This will copy the image into the clipboard so you can paste it onto a practice document.

	Clients	Product L	list	Orders	Organiser	Communications	In
7		Remove Group		裔		Nemove 22 Change	嶺
New	Change		New	Add Current Client	Add Current Animal	R Hold Benefits	Ne Fe
	Scheme				Member		
Guide [							
	erm Medicine						
Breede	r Discount						
Breede Internel	Farm Drugs						
Breede Internel 50% Sa	Farm Drugs les Discount						
Breede Internel 50% Sa Sell Sto	Farm Drugs Nes Discount Ick at Cost Ser		iscount				
Breede Internel 50% Sa Sell Sto Surcha	Farm Drugs les Discount		Discount				

l Imaging B	usiness Barometer Visits
Current	Removed Scheme Usag
Expired	All Clients
Debt Only	All Clients
Sho	Current Client
Address Start	Current Animal

urance	Schem	ies Digital	Imaging	Business Barome	ter Visits	_		
1	Se Nev	v Adjustment	Currer	nt 🔲 Removed	Scheme Usa	ige		
New	👷 Cha	nge	Expire Expire	d All Clients *		_		
/ New Pay	🕷 Ren	iove	📃 Debt (	Only				
	Charge			Show	View			
Client	Animal	Breed		Address	Start	End	Auto Renewed	Scheme Debt On Hold
Andrew	Cody	Cavalier King Charles Spa		38 Nicholson Road	01/08/2019	31/07/2020	No	£0.00 No
Andrew	Eclipse	Burmese		38 Nicholson Road	01/08/2019	31/07/2020	No	£0.00 No
Grainger	Nicky	Collie (Rough)		99 Carlton Crest	13/05/2020	12/05/2021	No	£0.00 No
Malpas	Max	Domestic		16 Dene Road	13/05/2020	12/05/2021	No	£0.00 No
Morrison	Pongo	Dalmation		17 Dene Garth	13/05/2020	12/05/2021	No	£0.00 No

lenefit	Apply	Limit	Consult Date	Product	Savings Exc. VAT
Consultations	Line	0 used (unlimited)		No Sales Yet	n/a
accinations	Line	1 of 1	30/09/2019 11:19	Vaccinate Dog Booster (FOC HPC)	£35.00
lea Treatments	Qty			Frontline Combo S/on Med Dog3' (FOC HPC)	£21.80
/ormers	Qty	1 of 2	30/09/2019 11:19	Drontal Plus Flavour (FOC HPC)	£6.41
ood Prescription	Qty	0 used (unlimited)		No Sales Yet	n/a
ood Non Prescription	Qty	0 used (unlimited)		No Sales Yet	n/a