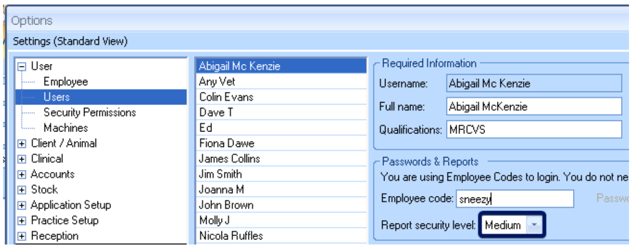
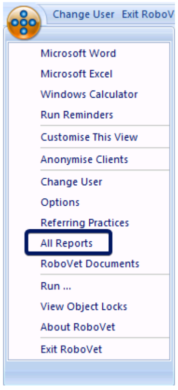
Back on Track – Recovering Lost Revenue

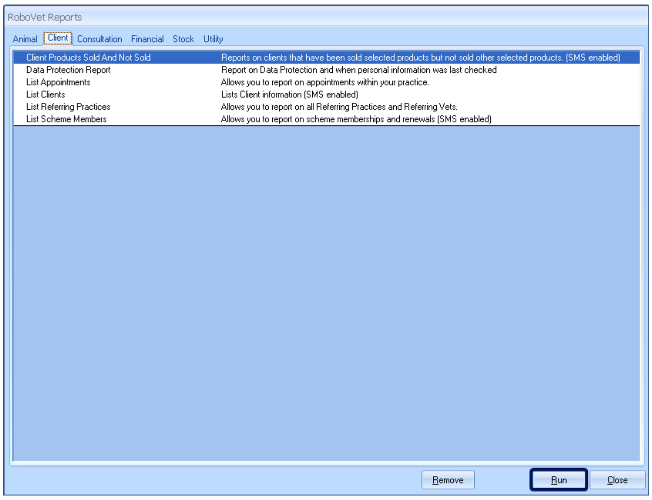
RoboVet



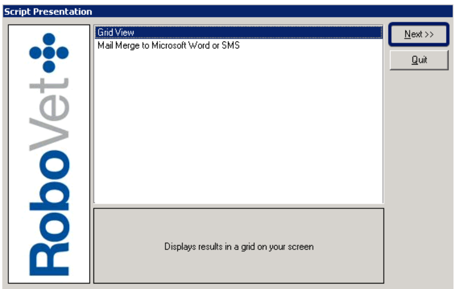
- This guide will go through a refresh on how to run a report to assist with identifying loss of revenue that may have been caused during the period of lockdown.
- Ensure that the user running this report has a security level of **Medium.**



- Click the RoboVet icon and select **All Reports.**

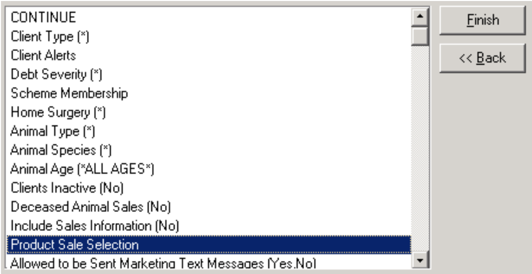


- Click the **Client** tab.
- Select **Client Products Sold and Not Sold.** (This should be highlighted by default)
- Double click the report or click **Run.**

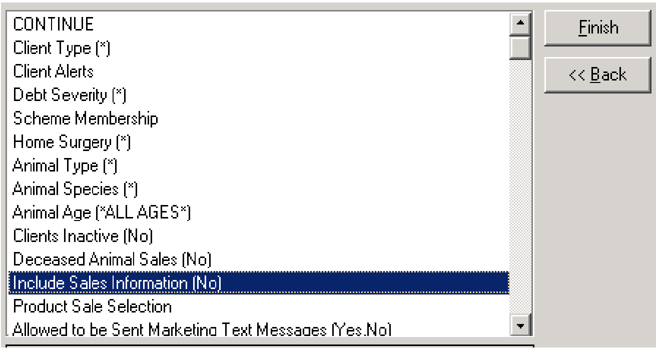


- Select **Grid View** and click **Next.**

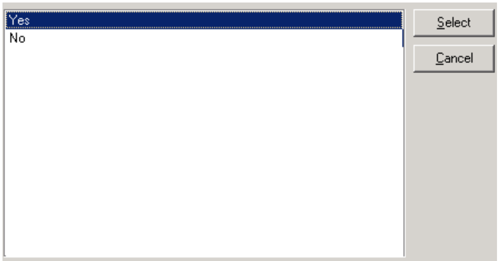
- A list of options will appear.



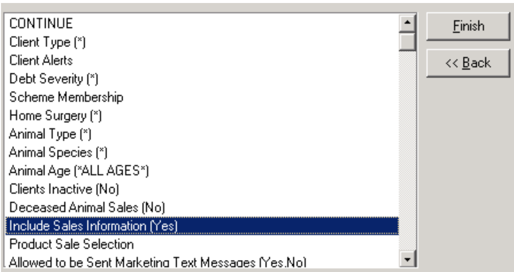
- The product sales selection is the minimum required to have some data produced in a report, filtering the options will give a more detailed targeted report.



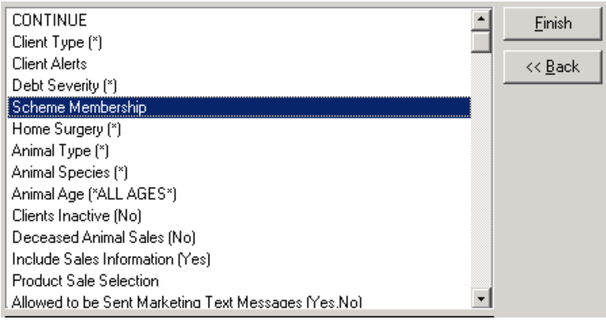
- Change **Include Sales Information** to show the descriptions of the items in the report.
- This is useful when including more than one type of product in filters screen.
- For example, all pack sizes of a product or versions of a medication that could be used for any certain condition.
- Double click.



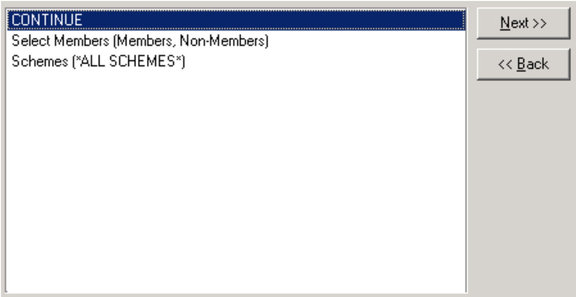
- Select **Yes.**



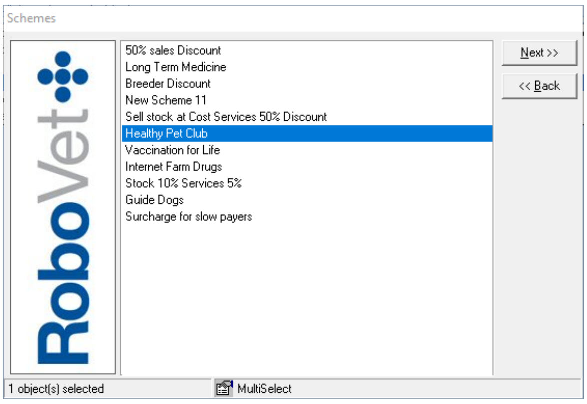
- The **Includes Sales Information** has now been changed.



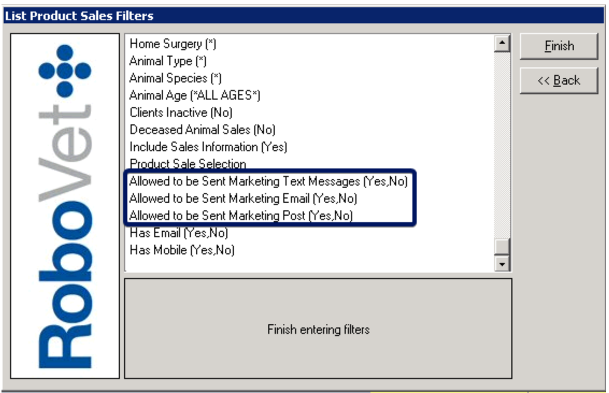
- **Scheme Membership** is another valued filter to use as this will show clients who have purchased items on a scheme and have not returned for repeated sales.
- Double click **Scheme Membership.**



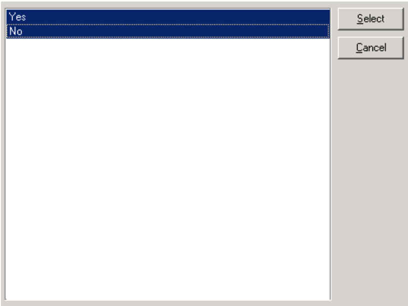
- Click **Select Members** and then choose whether they are a member of a scheme or not.
- Click **Schemes.**



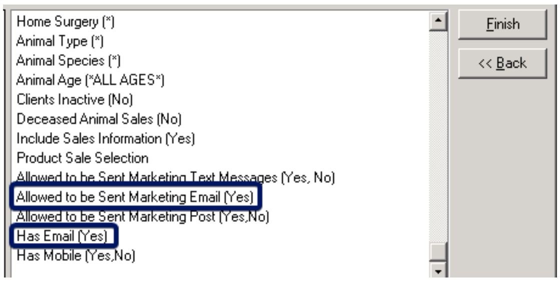
- Choose which schemes you want to be included on the report then click **Next.**



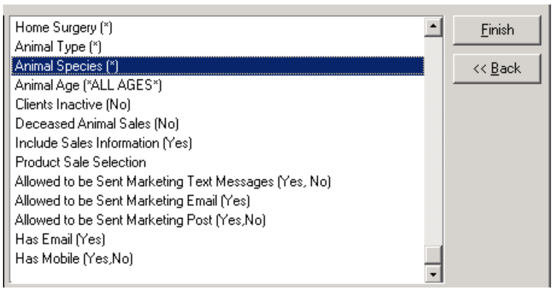
- Other options that should be used to filter the report are the marketing preferences.
- If sending by email, double click **Allowed to be set Marketing Email.**



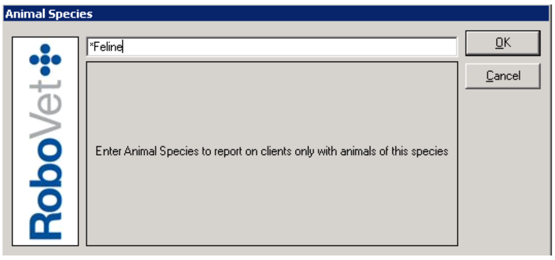
- Select **Yes.**



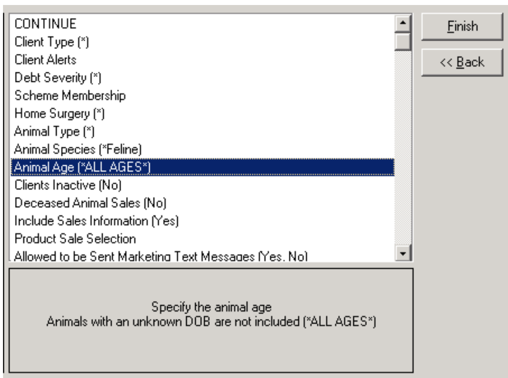
- Do the same for the **Has Email** filter.



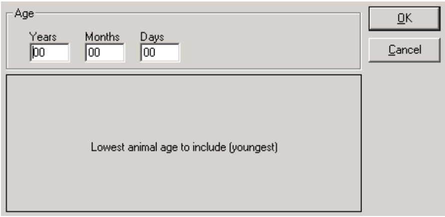
- If you would like to filter by a specific animal, double click **Animal Species.**



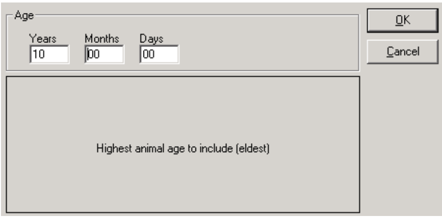
- Type the species into the box.
- An ***** in front of the name will search for any combination of those letters in the species name.



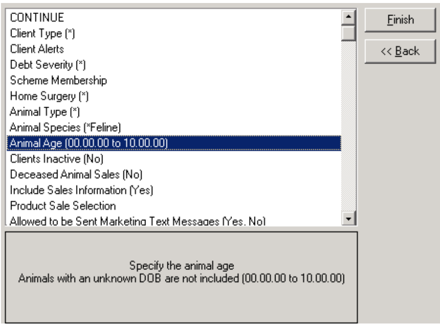
- If you are setting the age of the animal, note that the age is for the current date, not the date at the time of the sale.



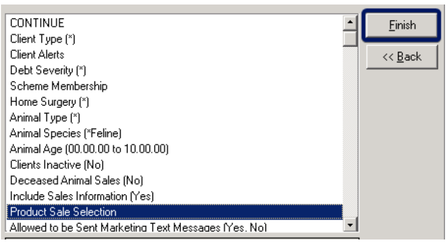
- Pick a starting age.



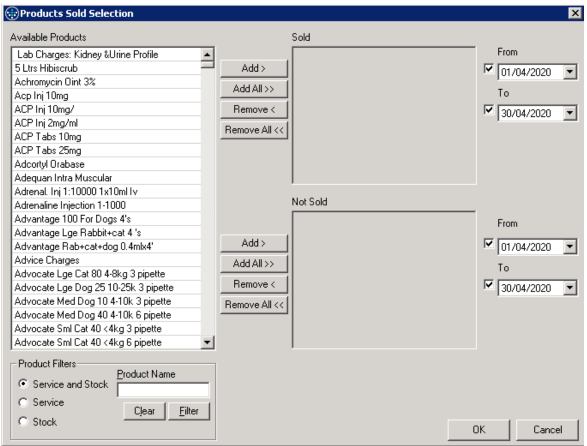
- Pick a maximum age that you want to see.



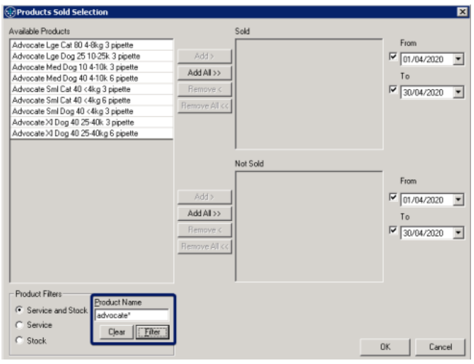
- The age range is for the current date. If you want to include animals who were 10years, but you're looking at sales 6 months ago then ensure the age range is 10 yeas 6 months, otherwise it would only list animals up to a maximum 9 years and 6 months.



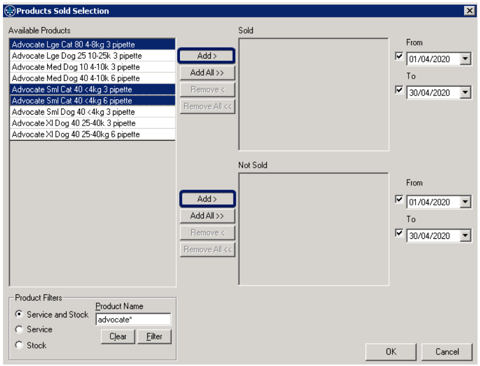
- Select the **Product Sale Selection** option and click **Finish**.



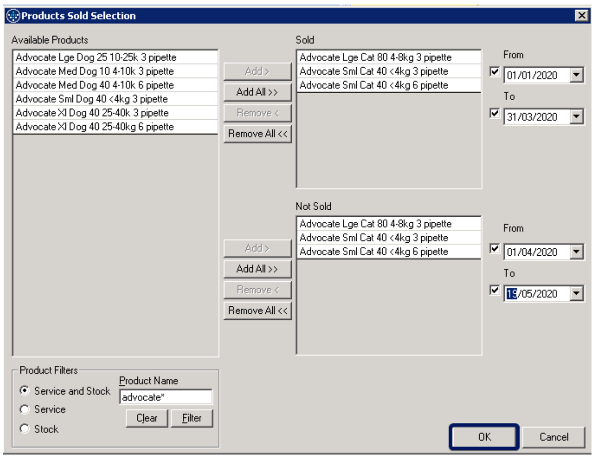
- The selection screen by default, shows all products in your database.
- These are a mix of stock and service items displayed in alphabetical order.
- In the **Product Filters** section, choose the stock or service options and you can enter an individual product name as needed.



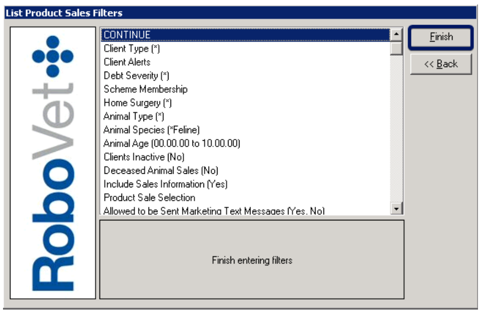
- Enter a product name in the box and click filter to display the items you want to search for.
- Once **Filter** is clicked the list will instantly hide all items that don't match.



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

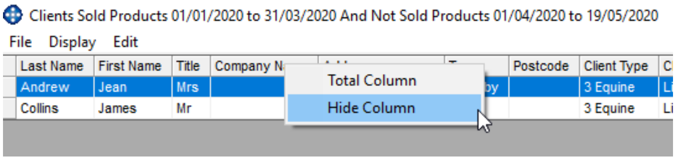


- You can add or remove items as you need to. The sections do not need to match.
- Change the dates for both sections.
- In this example, it's looking for all sales between 1st January and 31st March 2020 and who has not been back and repeated the sales from 1st April till 19th May.
- Click **OK**.

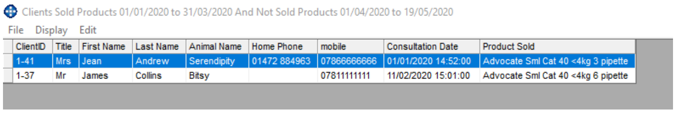


- Once all your filters are set, highlight **Continue** and click **Finish.**

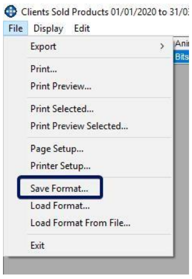
- This will display the report.



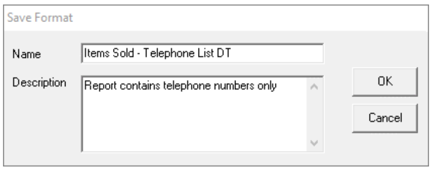
- Hide any unwanted columns by right-clicking the column and selecting **Hide Column.**



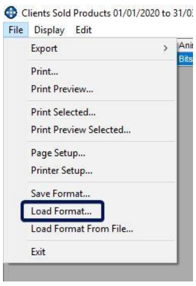
- Change the order of the columns by clicking and holding the top of the column and drag it to the new location.



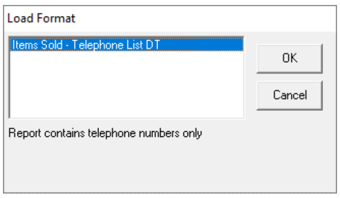
- To save the layout of the report, click **File** then **Save Format**.



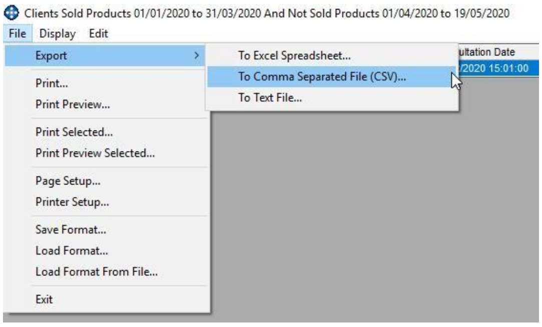
- Name the report something which will be memorable and give it a description.



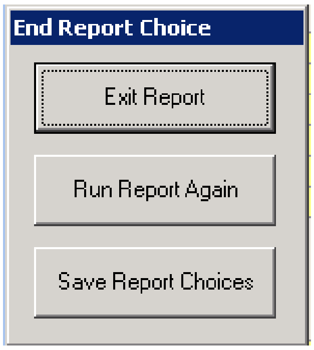
- To load the report format, click **File** then **Load Format.**



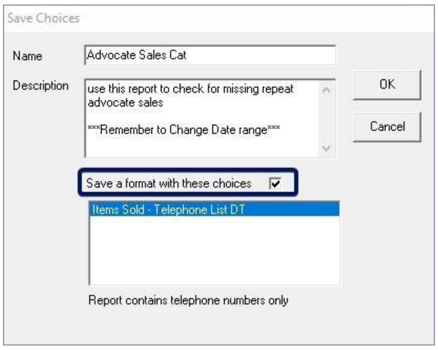
- Choose the desired format and click **OK.**



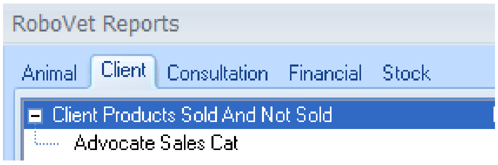
- To print the report, click **File** then **Print.**
- The report can be exported to a CVS file for further analysis.



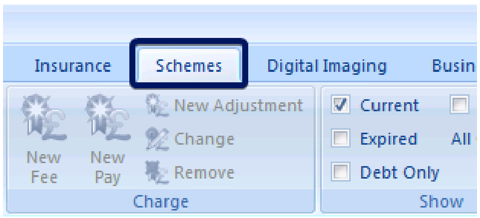
- Once the report has been run and exported then closed, you will be presented with the following options.
- You can **run** the report again if you need to change any filters.
- **Save** report allows you to store the report using the format presented in the preview.



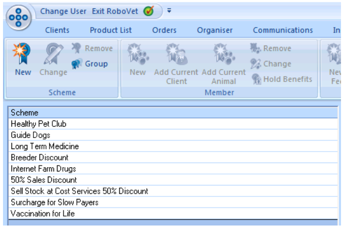
- Give the report a suitable name.
- Add a description and ensure to add a note to change the dates.
- Ensure to tick **Save a format with these choices.**



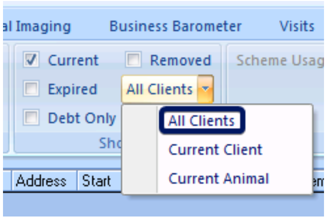
- The saved report will then be shown below the original report by clicking on the **+.**



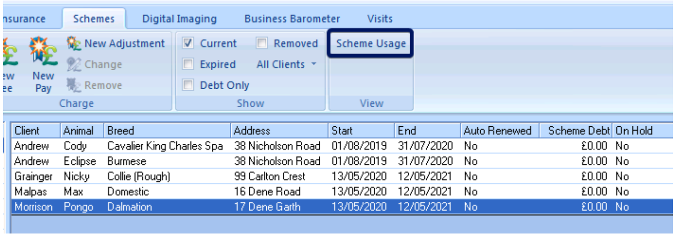
- To report on an individual scheme, click **Schemes** in the ribbon bar.
- These can be Schemes that can be chargeable or not.
- Any item billed to a client or patient on a scheme is stored in this useful report.



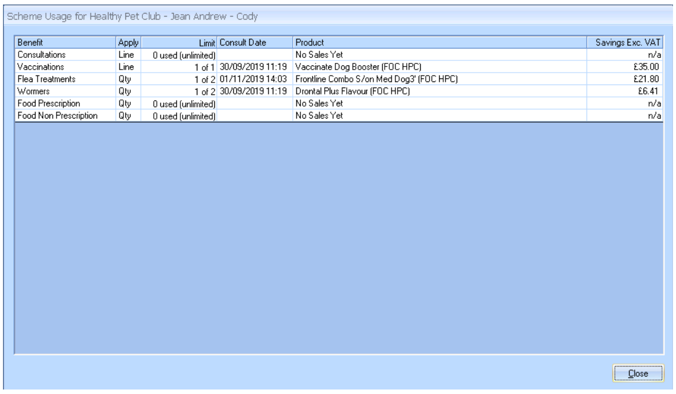
- Select the Scheme you wish to view.
- This will default to the current animal selected.



- 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.