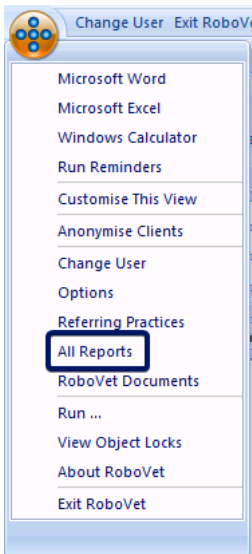
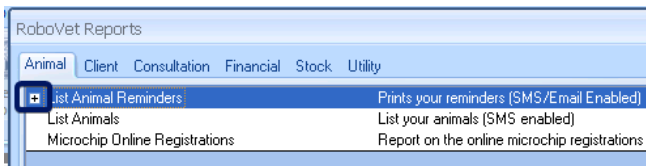


# Back on Track - Reminders

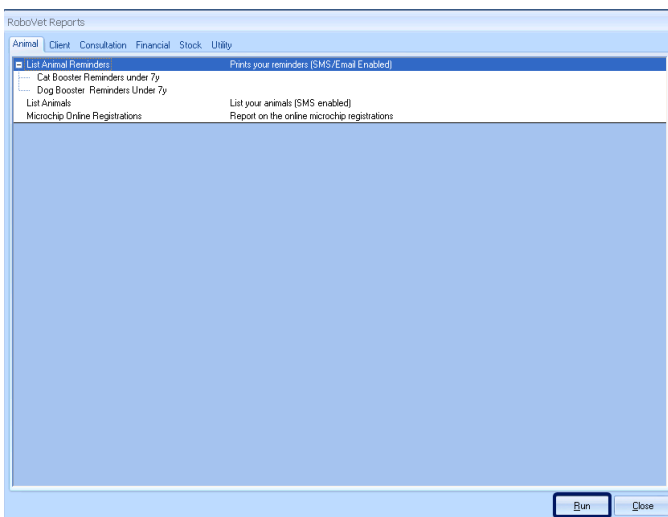
RoboVet



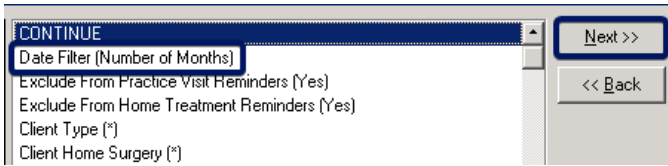
- This guide will show how to run reminders manually in RoboVet.
- From the main page, click on the **RoboVet** icon in the top left of the screen.
- Click **All Reports**.



- The first report listed is the **reminder run**.
- If there is a + showing to the left, it means there are customised reports previously saved by the practice.



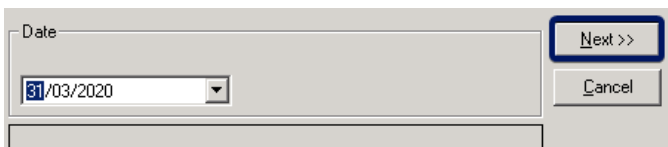
- There are 4 different ways to send a reminder to a client within RoboVet.
  1. Produce a **list** with contact details. This list can be used 'in house' to manually contact the client or may be exported to a 3<sup>rd</sup> party company such as Merial or Chameleon.
  2. Generate an **Email**.
  3. Generate a **Text Message**.
  4. Generate a **letter** or **label** for posting.
- Any one of these could or should be saved as a custom report possibly separated by species, for example, **Dog Reminder Email, Dog Reminder SMS, Cat Reminder Email etc.** or possibly all species in one.
- Click **Run**.



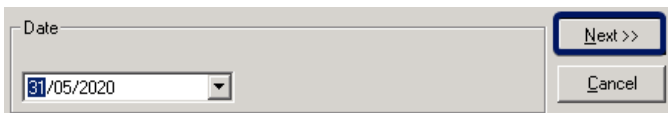
- A list of possible filters will be displayed.
- If this is a custom report, these filters will already be set appropriately, and you would not normally need to change any of these except for the **Date Range**. This will need to be set to the period for which you want to generate these reminders.
- Highlight the **Date** filter and click **Next**.



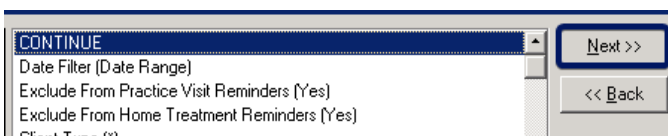
- Four options will be displayed.
- **Number of Months** (from today's date)
- **Number of Days** (from today's date)
- **Date Range**
- **Days Range** (from today's date)
- Usually the reminders are run for a specific period so highlight **Date Range** and click **next**.



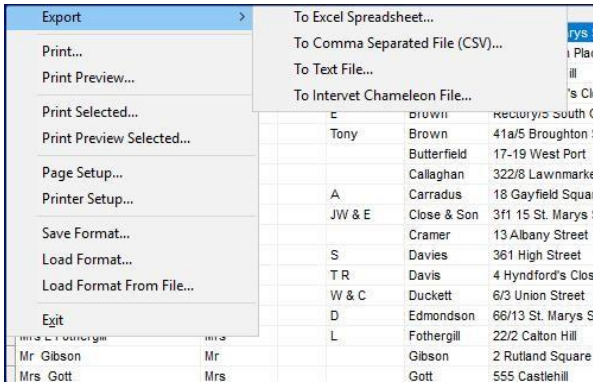
- Enter a **Start Date** and click **Next**.



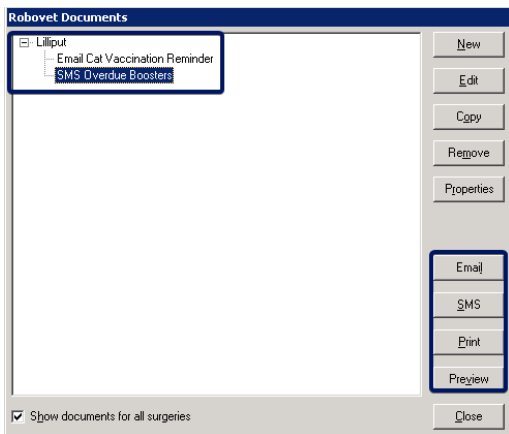
- Enter an **End Date** and click **Next**.



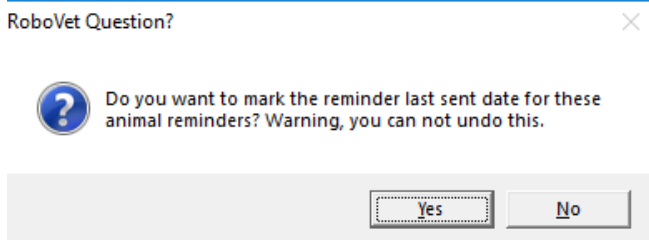
- You will return to the list of options.
- Click **Next**, followed by **Finish**.
- The report will run.
- By default, only those animals that were/are due a booster in the time period selected and have not yet received that booster will be selected.
- Depending on how the filters have been used, it may only produce a list of those animals that have not been previously received this reminder.



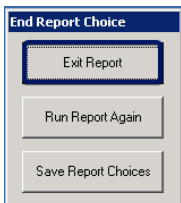
- If the **Grid View** (or list) was selected, by clicking **File**, then **Export** you can choose to export the results as an Excel spreadsheet or as a CSV file.



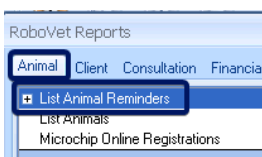
- If the output was selected as a **Mail Merge, SMS or Email** then a list of templates will be displayed.
- Choose the appropriate one and then either **Preview** or use the appropriate **Email/SMS/Print** button.
- Note, all new templates are created using MS Word and all previews are displayed in MS Word regardless of how they will be sent.



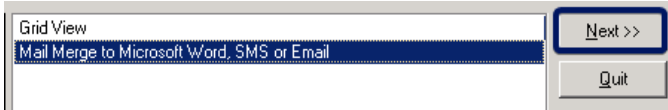
- When you exit the report, you will be asked whether to set the **Last Sent Date** for those reminders that have been generated.
- Usually the response should be **Yes**. This enables the report to be run again but only displaying those animals that have not appeared on a previous run.



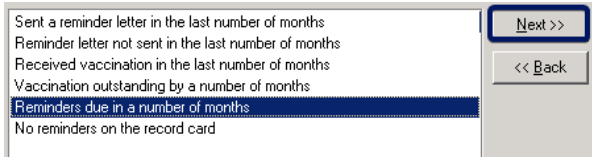
- Click **Exit Report**.



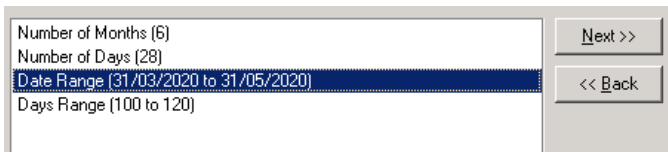
- As a result of the Covid-19 lockdown, you may need to produce an unusual reminder run. Double click on the **List Animal Reminders** report.



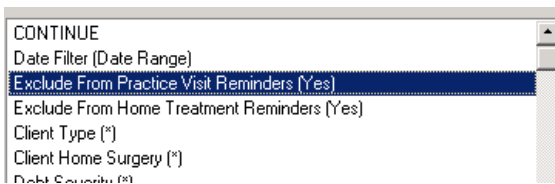
- Choose the report output format that you require.



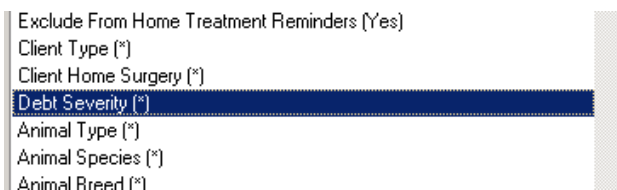
- Choose **Reminders Due in a number of months**.



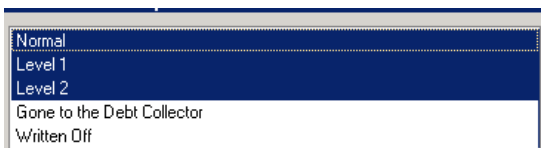
- Set the dates as before.
- By default, it is set for **Next Month**. In these circumstances you may wish to run this report from 1<sup>st</sup> March to 31<sup>st</sup> may.
- Remember – it will only list animals that have **not** received a booster and we can choose to only list animals that have not already received a reminder.



- Leave **Exclude from Practice Visit Reminder as Yes**.
- This filters out clients who do not wish to receive reminders from the practice.



- By default, all clients who are happy to receive reminders will be listed.
- You may choose to filter out some clients, for example, **Bad Debtors**.



- Multiple opt-ins can be highlighted by clicking on the options whilst holding the **CTRL** key or **Shift** key.



- By default, all animals' species will be selected. You may choose to produce reminders only for a select group of species.

Animal Breed (\*)  
 Animal Age (\*)  
**Deceased (Not Deceased)**  
 Neutered (\*)  
 Distinguishing Marks (\*)

- By default, reminders are only produced for animals that are not deceased.

Animal Date of Registration (\*ALL DATES\*)  
 Animal Gender (\*)  
**Animal Reminder Type (\*)**  
 Last Reminder Sent Status (Ignore Last Reminder Sent Status)

- Select a specific **Animal Reminder Type**.

Dog Vaccination (Practice Visit)  
 Worm Treatment (Practice Visit)  
 Rabbit VHD (Practice Visit)  
 Rabies (Practice Visit)  
 Kennel Cough (Practice Visit)  
 Arthritis Check (Practice Visit)  
 Herd Health Visit (Practice Visit)  
**Cat Vaccination (Practice Visit)**  
 Dental Treatment (Practice Visit)  
 Puppy Party (Practice Visit)  
**Rabbit Vaccination (Practice Visit)**  
 Horse Vaccination (Practice Visit)

- Select multiple options by using the **CTRL** or **Shift** keys.

Animal Date of Registration (\*ALL DATES\*)  
 Animal Gender (\*)  
 Animal Reminder Type (\*)  
**Last Reminder Sent Status (Ignore Last Reminder Sent Status)**  
 Last Reminder Sent Date Options (Sent In Last x Months)  
 Seen Since Date (\*ALL DATES\*)

- The last reminder sent status is set by the prompt on earlier reminder runs.

Animal Date of Registration (\*ALL DATES\*)  
 Animal Gender (\*)  
 Animal Reminder Type (\*)  
**Last Reminder Sent Status (Ignore Last Reminder Sent Status)**  
 Last Reminder Sent Date Options (Sent In Last x Months)  
 Seen Since Date (\*ALL DATES\*)

- Ignore Last Reminder sent** can be left as it is.
- Never Sent A Reminder** omits animals that have already received a reminder.
- Has Been Sent a Reminder** only shows animals that have already received at least one reminder.

**Last Reminder Sent Status (Never Sent A Reminder)**  
 Last Reminder Sent Date Options (Sent In Last x Months)  
 Seen Since Date (\*ALL DATES\*)  
 Create Single Reminder Per Animal (Yes)  
 Allowed to be Sent Reminder Text Messages (Yes,No)  
**Allowed to be Sent Reminder Email (Yes)**  
 Allowed to be Sent Reminder Post (Yes,No)  
 Allowed to be Sent Marketing Text Messages (Yes,No)  
 Allowed to be Sent Marketing Email (Yes,No)  
 Allowed to be Sent Marketing Post (Yes,No)  
 Has Mobile (Yes,No)  
**Has Email (Yes)**  
 Set Reminder Last Sent Date (Prompt)

- These filters select whether the client should receive an **Email** or an **SMS Message** or be sent a reminder by **Post**.
- In this example, the client **must** have an email address, is happy to receive reminder Emails and has not previously been sent this reminder (by post or SMS).