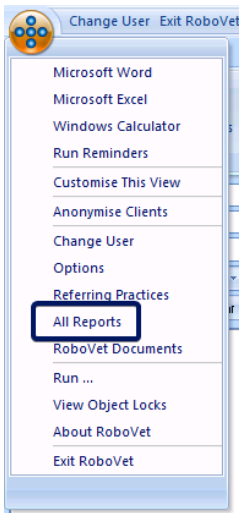
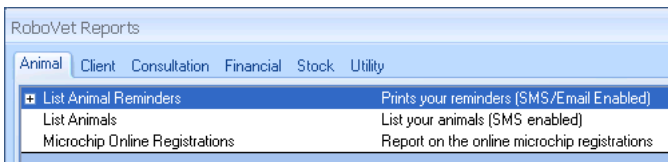


Back on Track - Reports

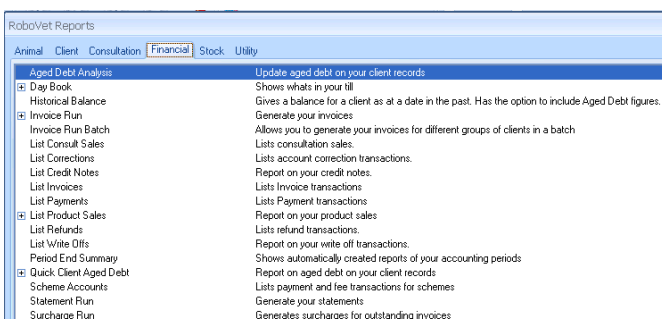
RoboVet



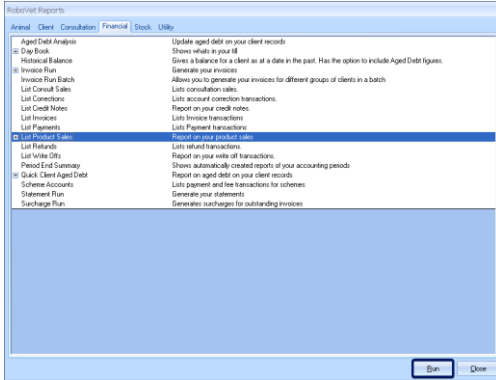
- This guide will show you how to run a Price List Report and how to manipulate data from the report.
- From the main RoboVet page, click on the RoboVet icon in the top left corner.
- Choose **All Reports** from the menu.



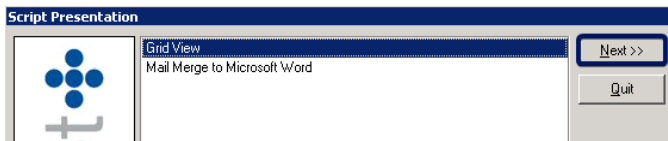
- By default, the first report listed in the reminder run. On any parent report, if there is a + showing to the left, this means there are some customised reports previously saved by the practice.
- Report categories are split into 6 generic areas filtered by the tabs across the to, **Animal, Client, Consultation, Financial, Stock & Utility**.
- Some reports also show **SMS enabled** or **SMS/Email enabled**. These reports also let the practice contact the clients selected by the report via Email or text message provided the practice has set up those facilities.



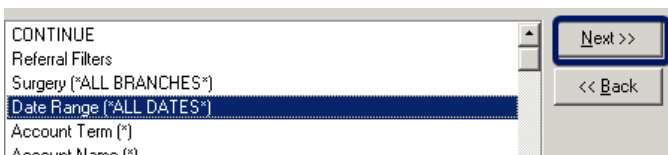
- As an example, if we click on the **Financial** tab a list of pre-set reports are displayed. Some of these have the + against them. There are custom versions of those reports that have been created.



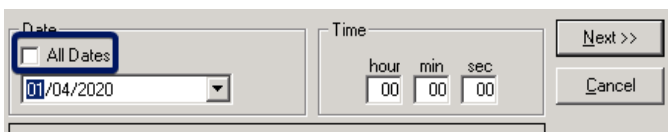
- Double click a report or highlight it and click **Run**.



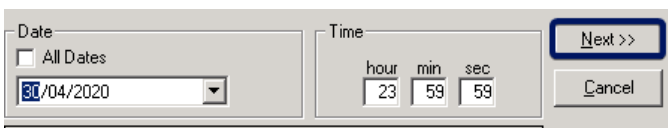
- There is the option of a **Grid View** (a standard list) or a **MailMerge to Microsoft Word**.
- Click **Next**.



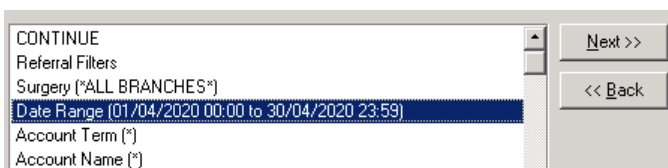
- A series of filters will be displayed.
- These filters do differ for different reports.
- There is a brief explanation for the use of each filter in the information box at the bottom of the list.
- The **Date range** will need to be altered.
- Highlight the **Date Range** and click **Next**.



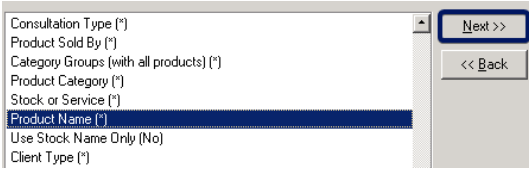
- Untick **All Dates** and enter a **Start Date**.
- Click **Next**.



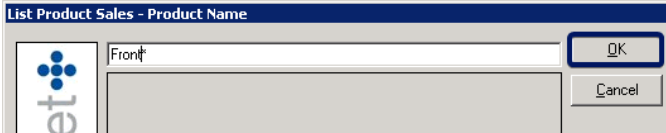
- Enter an **End Date** and click **Next**.



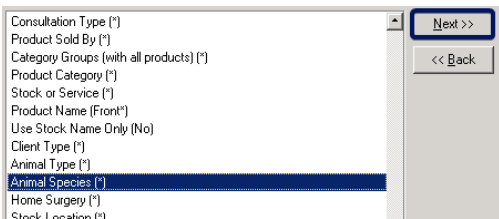
- You will return to the list of filters having changed the date range.



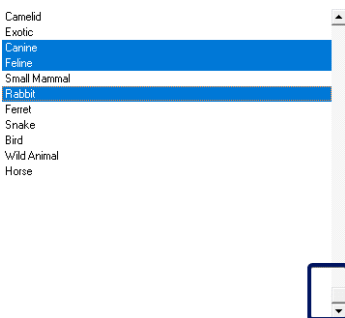
- Some filters, such as **Product Name**, require a free text entry.



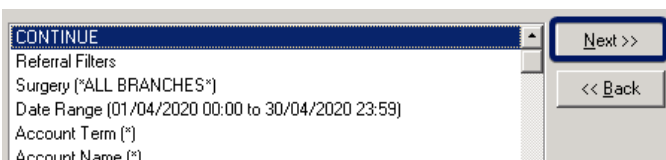
- Type in the name or part of the name of the item you wish to search for.
- You may use * as a wildcard at this point. The position of the * is critical. In this instance, the search will find all chargeable items that start with the word **Front**, so it will find all strengths of Frontline.
- If the search is entered as ***Front**, then the sold item must end with the word **Front** and the search will most likely return nothing.



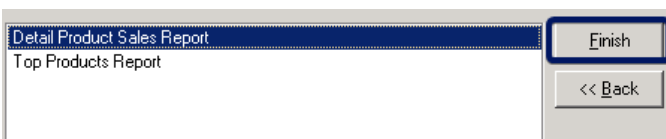
- Other filters will offer a choice of options.



- You can select more than one option from this list by holding down the **CTRL** key or the **Shift** key and clicking on each option.
- Note, the list may be more than a screenful and the search may start at the bottom of the list. Keep an eye on the position of the scrollbar.



- Once all filters have been selected, highlight **Continue** and click **Next**.



- There may be subsequent questions, answer appropriately then click **Finish**.

Consultation Date/Time	Consultation Type	Species	Client Name	Animal Name	Vet/Nurse	Client Type	Account Address
20/04/2020 14:36:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20570	1-50237
23/04/2020 14:37:00	1 Consultation	Low	Nick McGill	Lilliput	Nick McGill	1-20577	1-50245

- If a **Grid View** was selected the report will be displayed like this.
- By default, RoboVet outputs far more information that is likely need, so the grid can be treated like a primitive Excel spreadsheet.

Consultation Date/Time	Consultation Type	Surgery	Vet/Nurse	Client Type	Account Address
20/04/2020 14:36:00	1 Consultation	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Lilliput	Nick McGill	1-20570	1-50237
20/04/2020 14:36:00	1 Consultation	Lilliput	Nick McGill	1-20570	1-50237
23/04/2020 14:37:00	1 Consultation	Lilliput	Nick McGill	1-20577	1-50245

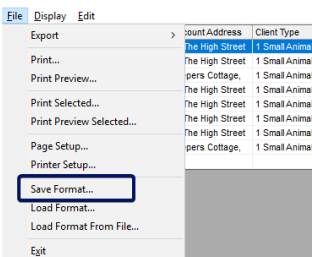
- You can right click on a column, or, if required will let you total a column.

Last Name	Client Type	Species	Animal Name	Account Address
Low	1 Small Animal	Feline	Felix	32 The High Street
Low	1 Small Animal	Feline	Felix	32 The High Street
Low	1 Small Animal	Feline	Felix	32 The High Street
Low	1 Small Animal	Feline	Felix	32 The High Street
Low	1 Small Animal	Canine	Fido	32 The High Street
Low	1 Small Animal	Canine	Fido	32 The High Street
Low	1 Small Animal	Canine	Fido	32 The High Street
Le Mesurier	1 Small Animal	Canine	Buster	34 The High Street
Le Mesurier	1 Small Animal	Canine	Buster	34 The High Street
Jacques	1 Small Animal	Canine	Rover	Keepers Cottage,
Jacques	1 Small Animal	Canine	Rover	Keepers Cottage,

- You can hold the left mouse button down on a column header and drag it elsewhere within the grid view.

Last Name	Account Address	Client Type	Animal Name	Species
Low	32 The High Street	1 Small Animal	Felix	Feline
Low	32 The High Street	1 Small Animal	Felix	Feline
Low	32 The High Street	1 Small Animal	Felix	Feline
Low	32 The High Street	1 Small Animal	Felix	Feline
Low	32 The High Street	1 Small Animal	Fido	Canine
Low	32 The High Street	1 Small Animal	Fido	Canine
Low	32 The High Street	1 Small Animal	Fido	Canine
Le Mesurier	34 The High Street	1 Small Animal	Buster	Canine
Le Mesurier	34 The High Street	1 Small Animal	Buster	Canine
Jacques	Keepers Cottage,	1 Small Animal	Rover	Canine
Jacques	Keepers Cottage,	1 Small Animal	Rover	Canine

- Once the report is displaying in a way that you like, you can save the layout for use in any future iteration of that report rather than going through the process of hiding and moving columns.



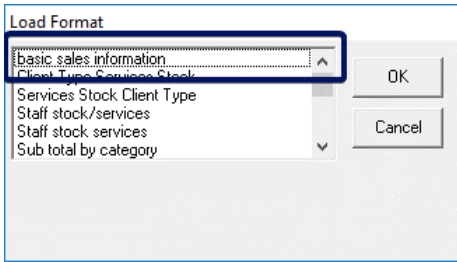
- Click on **File** and choose **Save Format**.

Save Format

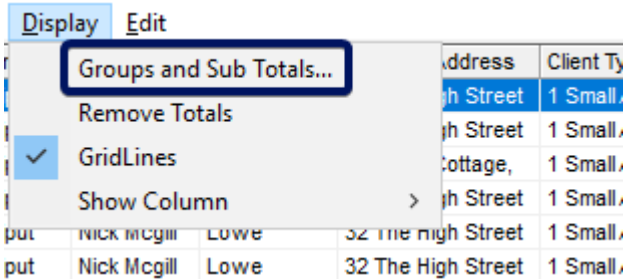
Name:

Description:

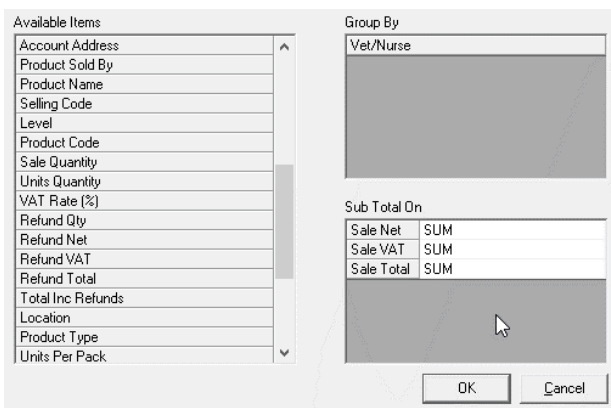
- Give the layout a precise yet concise name.



- For all future running of the report, you will be able to find that layout by clicking **File** then **Load format**,



- There is also a feature called **Groups and Sub Totals**. This can be found by clicking on the **Display** button.
- It acts in a similar way to an Excel pivot table to reformat the data from the report in a more useful way.

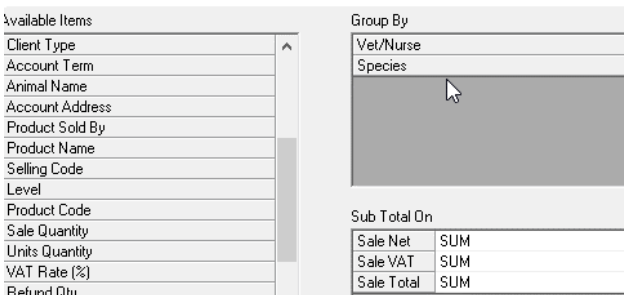


- For example, by holding down on **Vet/Nurse** in the **Available Items** column, you can drag this column header into the **Group By** box.
- You can then drag **Sales Net**, **Sales VAT** and **Sales Total** into the **Sub Total On** box.

File Display Edit

	Vet/Nurse	Sale Net	Sale VAT	Sale Total
+	Total Graham Martin	122.92	24.59	147.51
+	Total Nick McGill	142.34	28.47	170.81

- When you click on **OK** the data from the report is then formatted into totals for each vet/nurse. This format may also be saved.



- The **Species** (or any other available item, where appropriate) may then be added to the **Group By** box

File Display Edit						
1	2	Vet/Nurse	Species	Sale Net	Sale VAT	Sale Total
		Graham Martin	Total Canine	122.92	24.59	147.51
		Total Graham Martin		122.92	24.59	147.51
		Nick McGill	Total Canine	59.26	11.85	71.11
		Total Nick McGill		59.26	11.85	71.11
		Nick McGill	Total Feline	83.08	16.62	99.70
		Total Nick McGill		83.08	16.62	99.70

- The display rearranges (using the same data) to show the split by species for each vet.

Available Items

- Refund Net
- Refund VAT
- Refund Total
- Total Inc Refunds
- Location
- Product Type
- Units Per Pack
- Discount Given
- Pre Discount Sale Total
- Consult Referring Vet Full Name
- Consult Referring Vet Formal Name
- Consult Referring Vet First Name
- Consult Referring Practice Name
- Consult Referring Practice Address
- Consult Referring Practice Town
- Consult Referring Practice Postcode

Group By

- Species
- Vet/Nurse

Sub Total On

Sale Net	SUM
Sale VAT	SUM
Sale Total	SUM

- The **Vet/Nurse** can be dragged out of the **Group By** box and the dragged back in. This changes the order.

File Display Edit						
1	2	Species	Vet/Nurse	Sale Net	Sale VAT	Sale Total
		Canine	Total Graham Martin	122.92	24.59	147.51
		Canine	Total Nick McGill	59.26	11.85	71.11
		Total Canine		182.18	36.44	218.62
		Feline	Total Nick McGill	83.08	16.62	99.70
		Total Feline		83.08	16.62	99.70

- The same data is displayed, but in a different order. Now, we are splitting the totals by vet for each species.

Available Items

- Refund Net
- Refund VAT
- Refund Total
- Total Inc Refunds
- Location
- Product Type
- Units Per Pack
- Discount Given
- Pre Discount Sale Total
- Consult Referring Vet Full Name
- Consult Referring Vet Formal Name
- Consult Referring Vet First Name
- Consult Referring Practice Name
- Consult Referring Practice Address
- Consult Referring Practice Town
- Consult Referring Practice Postcode

Group By

- Species
- Vet/Nurse

Sub Total On

Sale Net	SUM
Sale VAT	SUM
Sale Total	SUM

- All these formats can be saved as a new format with its own unique name.

Available Items

- Refund Net
- Refund VAT
- Refund Total
- Total Inc Refunds
- Location
- Product Type
- Units Per Pack
- Discount Given
- Pre Discount Sale Total
- Consult Referring Vet Full Name
- Consult Referring Vet Formal Name
- Consult Referring Vet First Name
- Consult Referring Practice Name
- Consult Referring Practice Address
- Consult Referring Practice Town
- Consult Referring Practice Postcode

Group By

- Species
- Vet/Nurse

Sub Total On

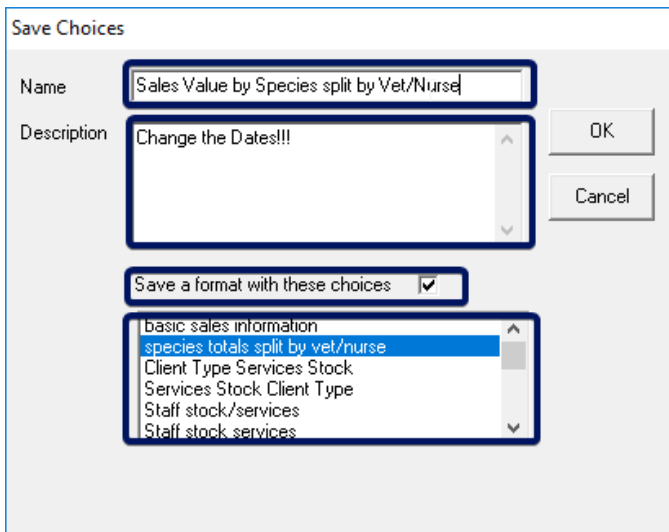
Sale Net	SUM
Sale VAT	SUM
Sale Total	SUM

- It is also possible to export any of these formats to Excel or as a CSV file for manipulation outside of Robovet.
- The practice can then generate their own pivot tables from any data that can be extracted from Robovet.

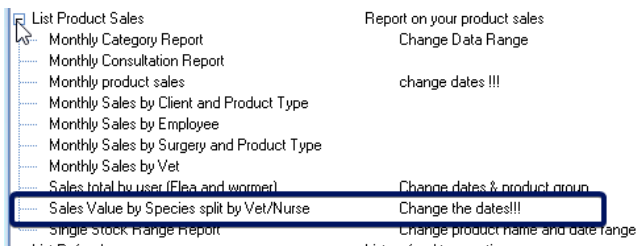
End Report Choice



- On exiting the report, a short menu appears, one option being **Save report choices**. The report choices are how the filters were set when the report was originally set up.
- If these choices are saved with a unique name then, the next time this report is required the only filter that will need changing is the date period



- Try and be clear with the name what the report will achieve. A description can be helpful to remind users what if any filters need altering or may be a more detailed description of the report aims.
- A list of the pre-saved formats will also be displayed. Select one and ensure that the **Save a format with these choices** box is ticked. This will automatically load your 1st desired format into the grid view, without having to **Load Format** within the display.
- Please note, once the grid view has loaded, any of the other pre-saved formats will also be available for loading and printing or exporting.



- This new custom report will now be available by clicking on the + next to the parent report.