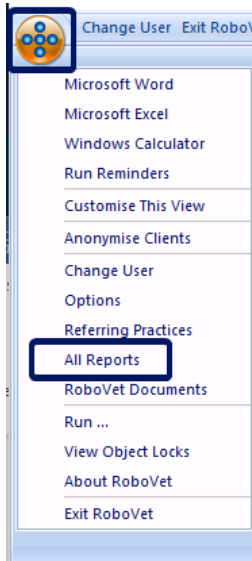


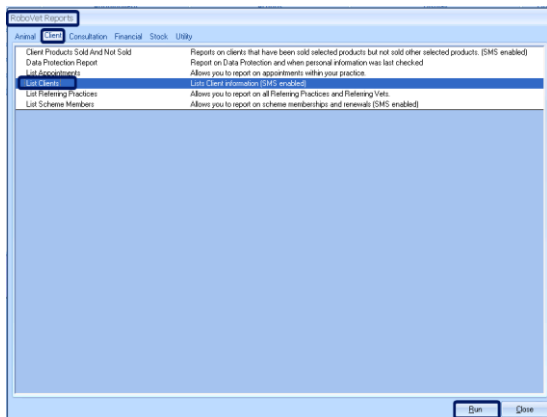
How to Run a Report and Contact all Clients

RoboVet

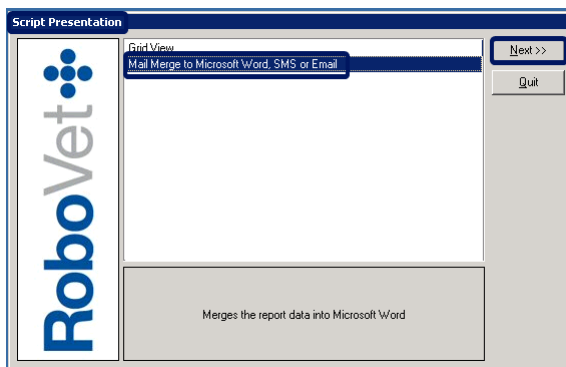




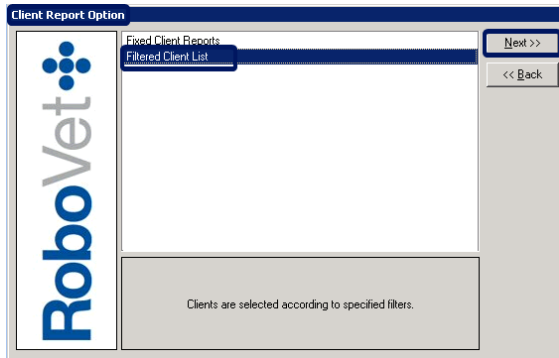
- This guide will show how to run a report to get a list of active clients and send a bulk message via Email or SMS.
- This is for practices who don't use Rapport and use the inbuilt RoboVet feature. This guide assumes you have Email and SMS configured already.
- Click the **RoboVet** icon in the top left of the window and select **All Reports**.



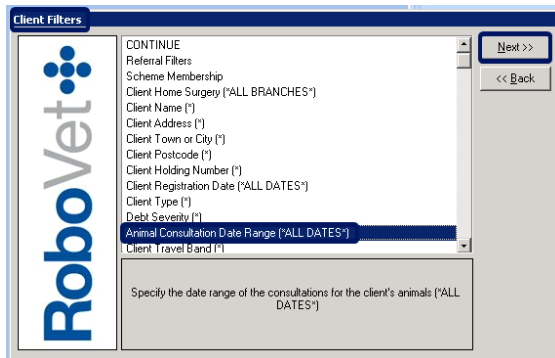
- The RoboVet Reports pop up window will appear, and you will be on the Animal tab.
- Click the **Client** tab, highlight **List Clients** and click **Run**.
- **Close** will close the RoboVet Reports window.



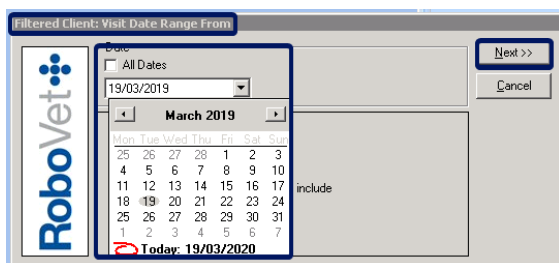
- The Script Presentation window will appear.
- Click **Mail Merge to Microsoft Word, SMS or Email** then click **Next**.
- **Quit** will return you to the RoboVet Reports window.



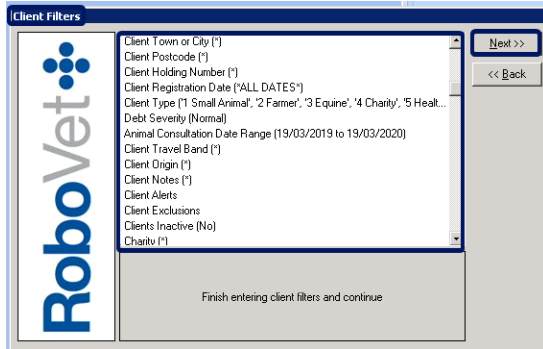
- The Client Report Option window will appear.
- Click **Filtered Client List** and click **Next**.



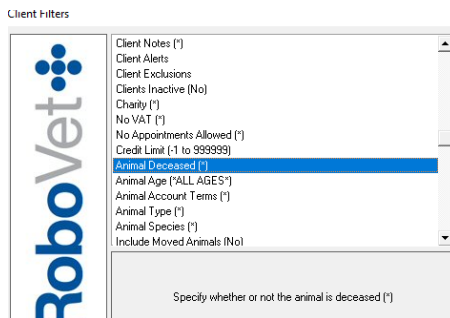
- The Client Filters list will appear.
- This section is where you choose the parameters for the clients you wish to contact by setting filters.
- A * next to the filter name means no filter is set or for date range filters it is looking at all dates.
- If you wish to set filter details, highlight the filter you wish to set and click **Next**.



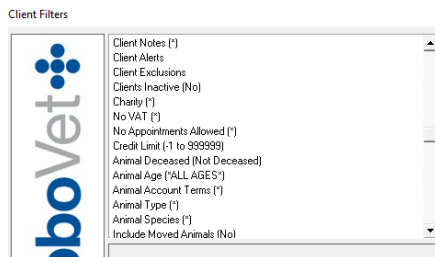
- Depending on the filter you wish to use, you will be presented with further choices to set your filter.
- Here we have selected the **Animal Consultation date** range filter; we can contact clients who have visited the practice in the last year.
- Remove the tick from **All Dates** so you can choose a **Start Date**. You can type in the date or choose from the calendar.
- When you have entered your start date, click **Next** to set the end date and click **Next** to set the filter.



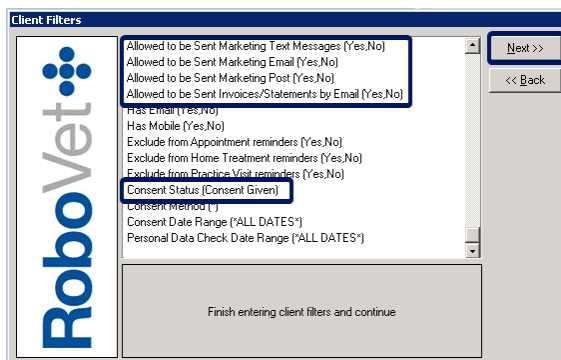
- Continue to set any other filter choices, such as alerts, client types or debt severity.
- Highlight the filter, click **Next** to make the choices and click **Next** to set the filter.



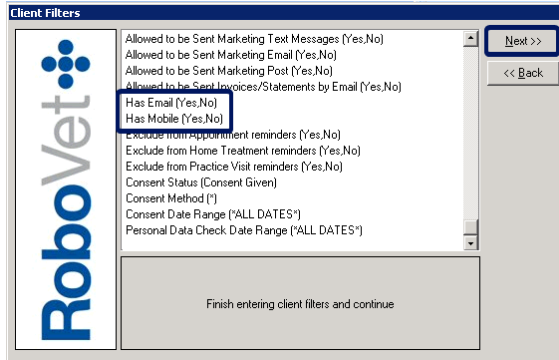
- Note that the Animal Deceased filter is set to report on clients who have deceased animals as well.
- You need to think about whether you want to exclude clients who have a deceased animal (and no living animals).



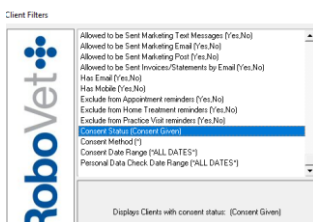
- To get a list of clients with at least one living animal, set the filter to not deceased.



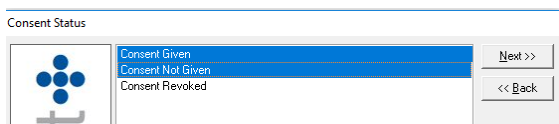
- Normally you should make your filter choices in line with your practice privacy policy and GDPR guidelines. However, as the comms you wish to send out is not marketing but giving clients advice regarding attending the practice during the COVID-19 outbreak, then you can leave these filters.
- Leaving the filter as **(Yes,No)** will find all clients regardless of GDPR choices.



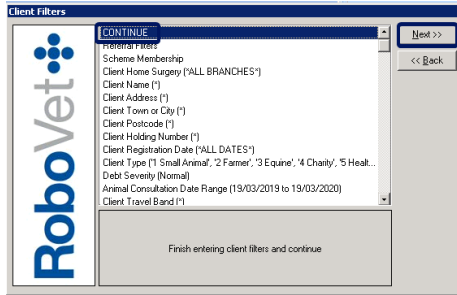
- Remember to choose the method by which you are wanting to contact these clients and choose an appropriate client filter.
- For example, selecting **Has Email (Yes)** will give you a list of clients you can email.
- For a list of clients to text, you would then run the report again with the same other filters but select the **Has Email (No)** and **Has Mobile (Yes)** filters.
- For a postal clients list set both the **Has Email** and **Has Mobile** to **No**.
- This way, although you must do up to 3 reports, you can tailor comms to the method used (for example, SMS has more restrictions on the character length of your message).
- It also means you are less likely to both email and text a client and use the method most suitable for them.
- Leaving the filter as **(Yes,No)** will find all clients regardless of whether they have an email address or mobile number on their record or not.



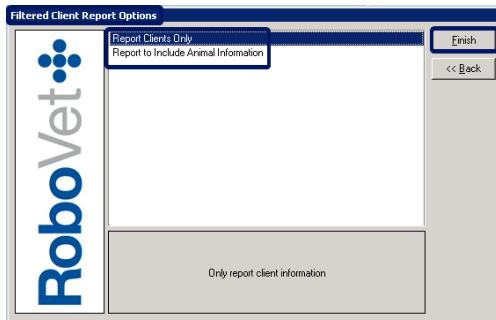
- Go to the **Consent Status (Consent Given)** filter.



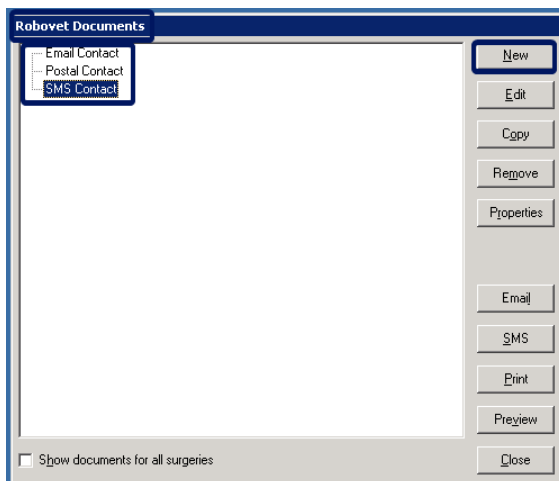
- The default is set as **Consent given**, however you should change this to show **Consent Given** and **Consent not Given**.
- This because not all practices use this field (consent is implied through the lawful basis of legitimate interest).



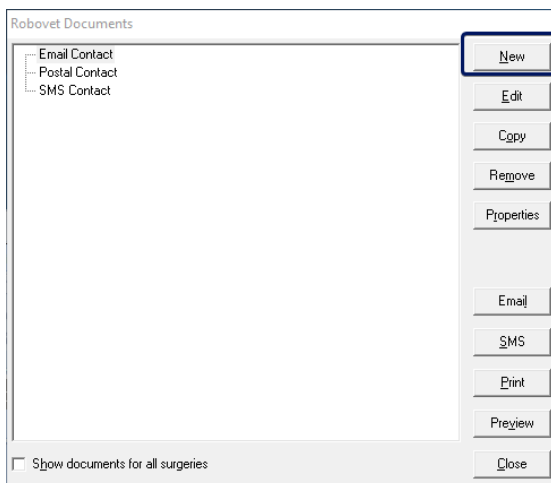
- When you have set all your filter choices, highlight **CONTINUE** and click **Next**.



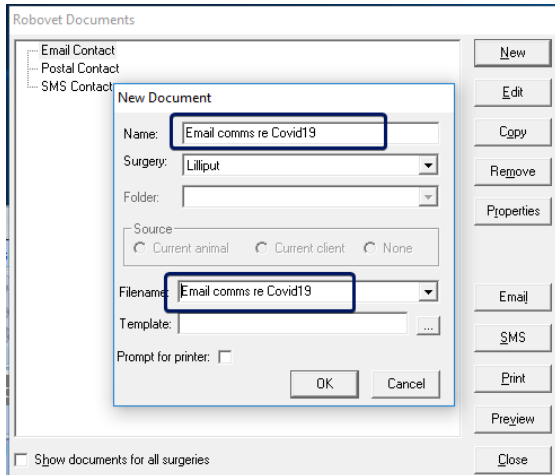
- The **Filtered Client Report Options** window will appear.
- Choose whether you want your report to be **Clients Only** or **Include Animal Information** by highlighting the option you want. In this case choose **Clients Only**.
- Click **Finish** to run the report.



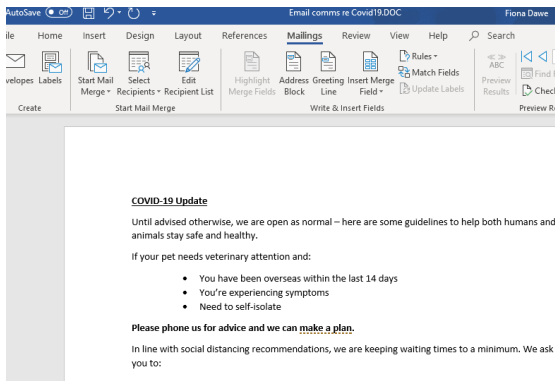
- When the report has run the **RoboVet Documents** window will appear.
- Choose the document you wish to use by highlighting it.
- If you do not have a document already set, click **New** to add one.
- If you have not used the mail merge type for this report before, then no documents will be displayed.



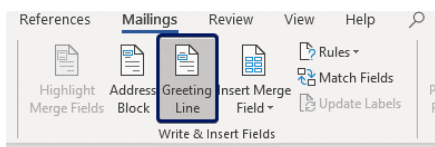
- To add a new document, click **New**.



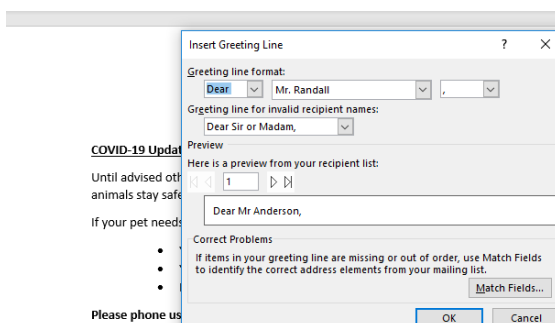
- The new document properties window will appear.
- Enter a name – put something in to indicate if it's an email, SMS or postal document. This will help when choosing the correct send option later.
- Click onto the **Filename** field and this will be auto populated with the same as the **Name**.
- Click **OK**.



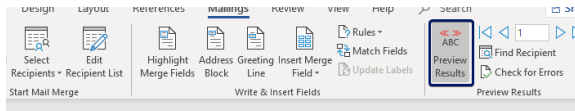
- This will then open word in **Mail Merge** mode. It will use your client report information as the available merge fields and merge data.
- Type in the required wording.
- This example is for an email communication.
- If this is for a text message, it is limited to 300 characters (2 messages).
- You may wish to paste in a link to your practice website or Facebook page for clients to check current information instead, as this may change daily.



- Add in any suitable merge fields such as a greeting line.



- Click **OK** to insert the greeting line.



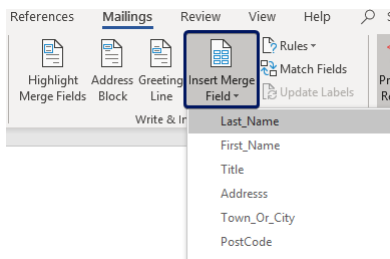
- This will show as a merge field.

«GreetingLine»
COVID-19 Update

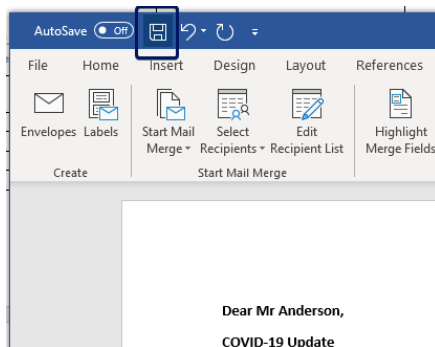
Until advised otherwise, we are open as normal – here are some guidelines to help both humans and animals stay safe and healthy.
 If your pet needs veterinary attention and:



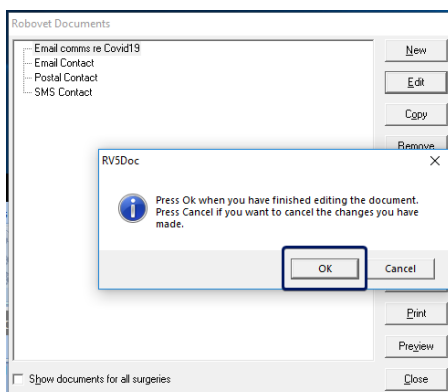
- To preview what this will actually look like, click on the **Preview Results** button.



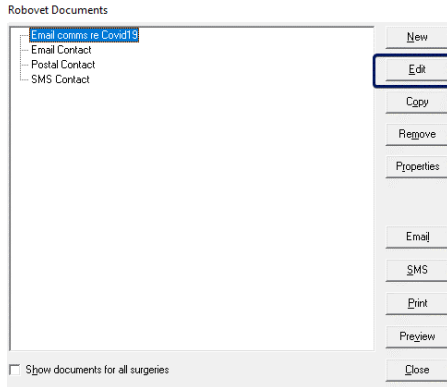
- You can also use the **Inset Merge Field** button to insert specific RoboVet fields into your document.



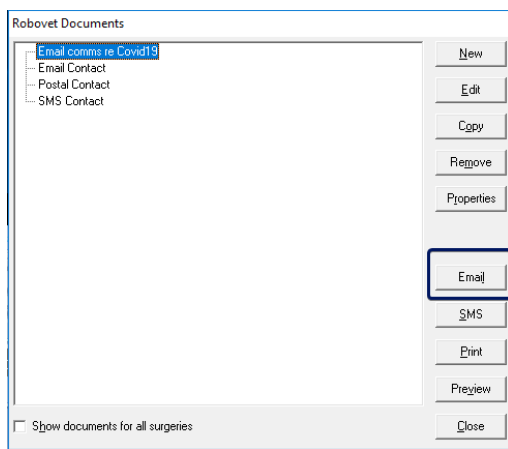
- When you have finished creating the document, click **Save**.
- Do not close the mail merge document yet.



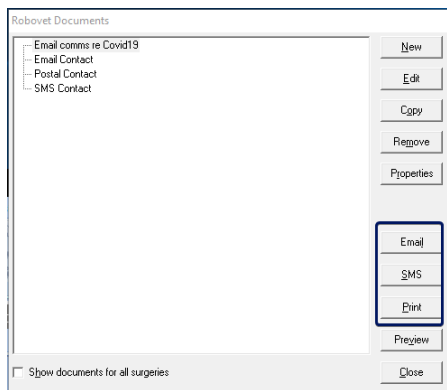
- Then click **OK** to save in RoboVet too.
- This will then close the mail merge document.



- You can edit the document (and can edit it later when running any client report), by highlighting the document and clicking **Edit**.
- **Edit** the word document and save in the same way as before.

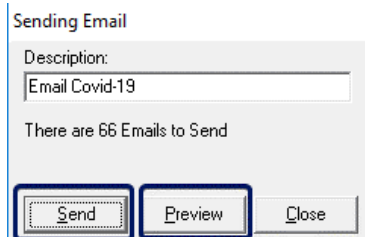


- The document is ready to use, highlight it and click on the appropriate comms method.
- **Preview** will allow you to preview the highlighted document as it will appear to clients in your report results.
- **Close** will close the RoboVet Documents and report window so you can start again from the beginning.

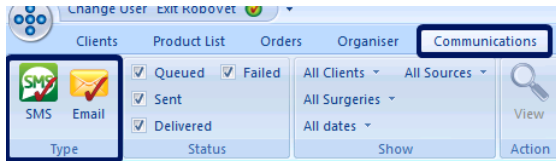


- Click **Email, SMS, or Post** to choose the method you are using to contact the clients in your report results.

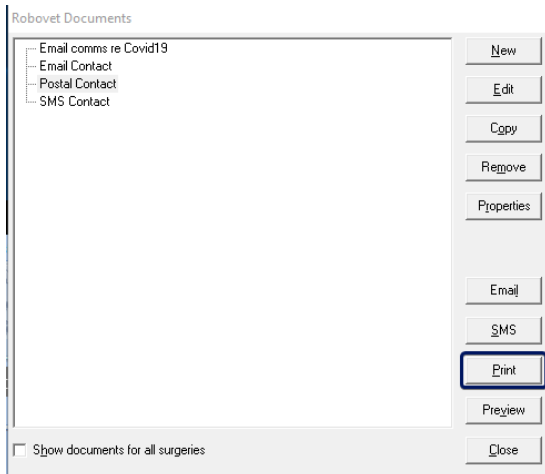
This must tally up with the highlighted document you have created so you **Email** the Email document and so forth.



- The mail merge document is generated, and you will be given the opportunity to preview the Emails or messages before sending.
- Click **Preview** if you want to preview all the comms before sending.
- Click **Send** to complete.



- **SMS** and **Email** contact will appear in the **Communications** tab in RoboVet when the contact choice has run.



- **Print** will allow you to print letters or labels to attach to postal contact, depending on how you set these up.