



Enhanced Reports



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Overview

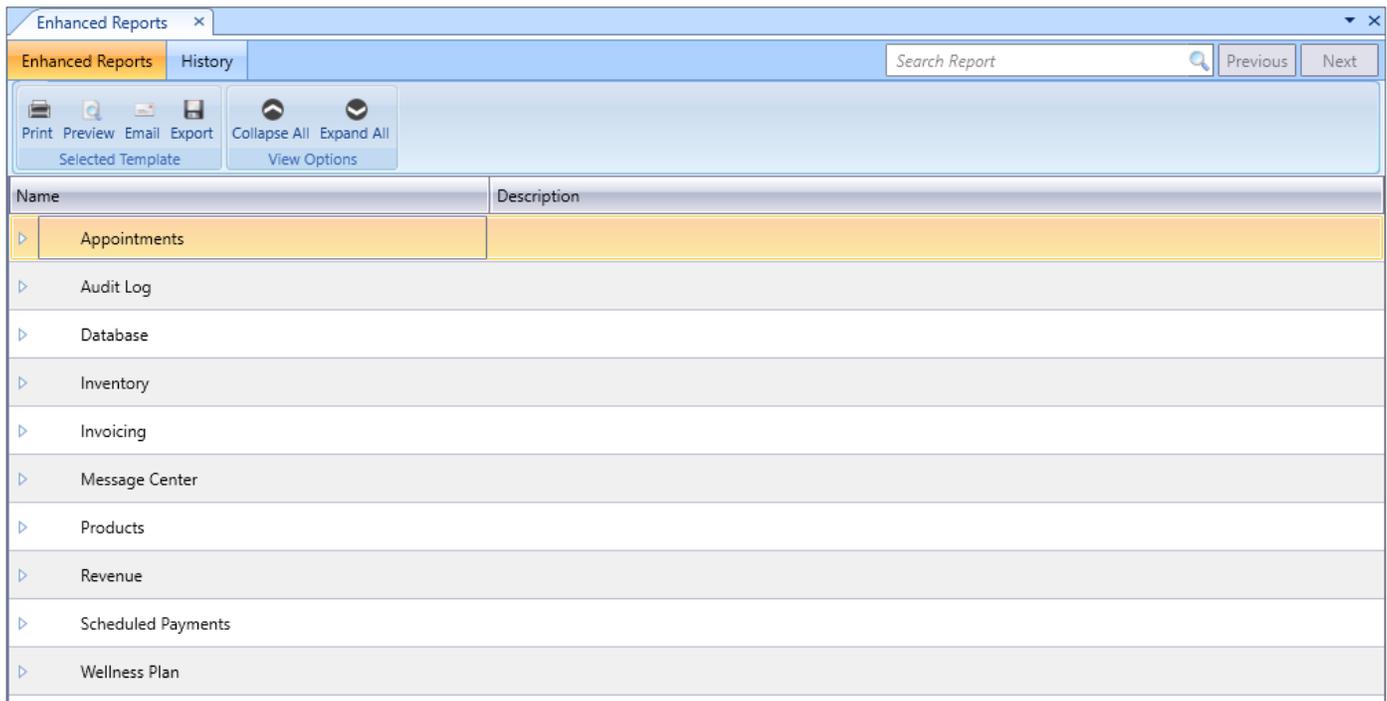
This booklet highlights a few of the Enhanced Reports you can run to help you manage your business. With each new major release of the ImproMed and ImproMed Equine software, new reports may be introduced. If a report is listed in this booklet but is not available in your Enhanced Reports module, you can check on two possibilities:

1. Are you on the most current release of the ImproMed or ImproMed Equine software? If not, contact the Update Team at (800) 925-7171 about getting updated to the newest release.
2. Have you selected all of the reports to be viewed for the selected operator? With most major releases of the software, new reports are added. However, those new reports are not selected to be viewed, by default.

To see if all of the reports for the selected operator are checked:

- a. On the **Ribbon**, click on **Business | Employees**.
- b. Click on the **Enhanced Reports Permissions** tab.
- c. On the **Template Restrictions** tab, are all of the reports checked? If not, select all reports the selected operator has rights to view.

For ease of use, Enhanced Reports are grouped by Category and introduced in this booklet, by category.



The screenshot shows the 'Enhanced Reports' window with a ribbon interface. The ribbon includes 'Enhanced Reports' and 'History' tabs, a search bar, and buttons for 'Print', 'Preview', 'Email', 'Export', 'Selected Template', 'Collapse All', and 'Expand All'. Below the ribbon is a table with two columns: 'Name' and 'Description'. The table lists the following categories:

Name	Description
▶ Appointments	
▶ Audit Log	
▶ Database	
▶ Inventory	
▶ Invoicing	
▶ Message Center	
▶ Products	
▶ Revenue	
▶ Scheduled Payments	
▶ Wellness Plan	

Favorite

This category will display at the top of all categories if any enhanced reports are marked as a favorite. If you run reports on a regular basis, click the star  to the left of a report. Doing so will create the Favorite category and place marked reports within that category. You can remove reports from the Favorite category by clicking the star again next to the report. If all marked reports are removed from Favorite, the category will be removed from the module.

Name	Description
Favorite	
★ Database Audit Log	Displays all additions, modifications, and deletions within the Client/Patient Database.
★ Products Invoiced - Employee (Date Completed)	Displays products invoiced by employee for the Date Completed selection.
★ Revenue (Repeat Clients)	Displays total revenue attributed to Repeat Clients (clients who visited more than once during the same years).
▶ Appointments	
▶ Audit Log	

Appointments

The following report can be found under the Appointments category.

Appointments Upcoming

This report will display all future appointments for the selected client account.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Appointments Upcoming			
APPOINTMENT DATE & TIME / PATIENT	CLIENT	TYPE	RESOURCE	NOTES	
Thursday, 06/30/2022 02:00 PM - 02:30 PM Fiona Naï'a	Folsum, Grace	Standard	Dr. Dan Bonnett	(920) 555-8800, Oshkosh, Grace Folsum Fiona, Newfoundland, Canine Naï'a, Newfoundland, Canine	
Wednesday, 07/06/2022 09:00 AM - 09:30 AM Fiona Naï'a	Folsum, Grace	Standard	Dr. Dan Bonnett	(920) 555-8800, Oshkosh, Grace Folsum Exam - Minor Fiona, Newfoundland, Canine Exam - Minor Naï'a, Newfoundland, Canine Exam - Minor	

Audit Log

Database Audit Log

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com					Database Audit Log Tuesday, February 1, 2022 at 12:00 AM to Monday, February 14, 2022 at 11:59 PM		
ImproMed Veterinary Clinic							
Field Modifications							
ACTION DATE & TIME	ACTION	OPERATOR / EDIT LOCATION	CLIENT	PATIENT	FIELD	PREVIOUS VALUE	NEW VALUE
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies Tag Number		357
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies Serial Number		32195351
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies Brand Name		Merial
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies History - Date Performed	08/07/2018	02/10/2022
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies History - Vaccine Type		Kill
2/10/2022 9:26 AM	Modified	Practice Manager (0) / Database Update Procedures	Gordon Freeman	Sherlock	Rabies History - Producer		Merial
2/10/2022 9:16 AM	Modified	Practice Manager (0) / Product Attachments	Anna Foley	Holly	Sex	F	FS
2/10/2022 9:16 AM	Modified	Practice Manager (0) / Product Attachments	Anna Foley	Holly	Spay/Neuter Date	01/12/2022	02/10/2022

Scheduled Payments Audit Log

The report will show all additions, changes, and deletions within Scheduled Payments.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com				Scheduled Payments Audit Log Monday, January 01, 2018 at 12:00 AM to Monday, December 31, 2018 at 12:00 AM			
Grace Folsom (30)							
Setup Balance Payment							
DATE & TIME	ACTION	OPERATOR	CARD ON FILE	DAY OF MONTH			
8/14/2018 10:11 AM	Modified	Practice Manager (0)	Visa ending in 0010	15			
Link Card On File							
DATE & TIME	ACTION	OPERATOR	CARD ON FILE	PAYMENT TYPE	PLAN TOTAL	FIRST PAYMENT	LAST PAYMENT
2/27/2018 11:08 AM	Added	Practice Manager (0)	Visa ending in 0010	Monthly Payment Plan - 6 month	\$238.10	3/27/2018	8/27/2018
8/14/2018 10:10 AM	Added	Practice Manager (0)	Visa ending in 0010	Monthly Payment Plan - 6 month	\$970.00	8/23/2018	1/23/2019
Process Payment							
DATE & TIME	ACTION	OPERATOR	CARD ON FILE	PAYMENT TYPE	PAYMENT AMOUNT	DATE DUE	DETAILS
2/27/2018 11:10 AM	Failed	Practice Manager (0)	Visa ending in 0010	Monthly Payment Plan - 6 month	\$39.70	3/27/2018	Unknown error
Robert Gill (11)							
Link Card On File							
DATE & TIME	ACTION	OPERATOR	CARD ON FILE	PAYMENT TYPE	PLAN TOTAL	FIRST PAYMENT	LAST PAYMENT
1/23/2018 10:25 AM	Added	Practice Manager (0)	Visa ending in 0010	Monthly Payment Plan - 1 Year	\$223.20	2/23/2018	1/23/2019
1/23/2018 10:40 AM	Removed	Practice Manager (0)	(None)	Monthly Payment Plan - 1 Year	\$223.20	2/23/2018	1/23/2019

Setup Database Audit Log

This report will display all additions, modifications, and deletions within several database setup screens.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com				Setup Database Audit Log Friday, January 1, 2021 at 12:00 AM to Tuesday, February 15, 2022 at 11:59 PM	
ImproMed Veterinary Clinic					
List Value					
ACTION DATE & TIME	ACTION	OPERATOR	FIELD	PREVIOUS VALUE	NEW VALUE
11/29/2021 2:38 PM	Removed	Practice Manager (0)	C - List Value	C	
Reminder					
ACTION DATE & TIME	ACTION	OPERATOR	FIELD	PREVIOUS VALUE	NEW VALUE
7/7/2021 2:09 PM	Modified	Practice Manager (0)	Rabies Vaccination - Use Defaults for this reminder	True	False
4/23/2021 8:03 AM	Removed	Practice Manager (0)	DEMO-No Info		
4/23/2021 8:03 AM	Replaced	Practice Manager (0)	Demo - Add Details - Reminder	Demo - Add Details	(None)
4/23/2021 8:03 AM	Removed	Practice Manager (0)	Demo - Add Details		
4/23/2021 8:01 AM	Added	Practice Manager (0)	DEMO-No Info - Name		DEMO-No Info
4/23/2021 8:01 AM	Added	Practice Manager (0)	DEMO-No Info - Species		Canine
4/23/2021 8:01 AM	Added	Practice Manager (0)	DEMO-No Info - Maximum number of reminders to send a given patient for this reminder definition:	0	2
4/23/2021 8:01 AM	Removed	Practice Manager (0)	DEMO-No Info		
4/23/2021 8:00 AM	Added	Practice Manager (0)	DEMO-No Info - Name		DEMO-No Info

Treatment Plan Audit Log

All additions, changes, and deletions from the Treatment Plan are displayed in this report for the date and time range selected. The Treatment Plan Audit Log can be found under the Audit Log category in Enhanced Reports.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Treatment Plan Audit Log Saturday, January 1, 2022 at 12:00 AM to Monday, February 14, 2022 at 11:59 PM				
Oreo (A) - Kayla Thorn (21)							
Treatment Plan							
ACTION DATE & TIME	ACTION	OPERATOR	STATUS	TREATMENT REASON			
2/8/2022 7:28 AM	Added	Practice Manager (0)	Started				
2/8/2022 10:00 AM	Modified	Practice Manager (0)	Closed				
Clean Cage							
ACTION DATE & TIME	ACTION	OPERATOR	PROVIDER	STATUS	INSTANCE DATE & TIME	QTY	PRICE
2/8/2022 7:28 AM	Added	Practice Manager (0)					
Exam - Brief							
ACTION DATE & TIME	ACTION	OPERATOR	PROVIDER	STATUS	INSTANCE DATE & TIME	QTY	PRICE
2/8/2022 7:28 AM	Added	Practice Manager (0)	Dr. Dan Bonnett (1)			1.0000	\$73.00
2/8/2022 7:28 AM	Added	Practice Manager (0)	Dr. Dan Bonnett (1)	Open	2/8/2022 9:00 AM	1.0000	\$73.00
2/8/2022 9:09 AM	Modified	Practice Manager (0)	Dr. Dan Bonnett (1)	Skipped	2/8/2022 9:00 AM	1.0000	\$73.00
Oral Surgery (Dental Related)							
ACTION DATE & TIME	ACTION	OPERATOR	PROVIDER	STATUS	INSTANCE DATE & TIME	QTY	PRICE
2/8/2022 7:28 AM	Added	Practice Manager (0)	Dr. Dan Bonnett (1)			1.0000	\$117.00
2/8/2022 7:28 AM	Added	Practice Manager (0)	Dr. Dan Bonnett (1)	Open	2/8/2022 9:00 AM	1.0000	\$117.00

Wellness Plan Audit Log

The report will display all changes, additions, and deletions made in Wellness Plans.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Wellness Plan Audit Log Friday, January 1, 2021 at 12:00 AM to Monday, February 14, 2022 at 11:59 PM				
Patient: Bucky (B) - Kayla Thorn (21)						
Wellness Plan: Silver						
Wellness Plan						
DATE & TIME	ACTION	OPERATOR	PROVIDER	START DATE	END DATE	PARENT PLAN
2/7/2022 10:09 AM	Activated	Practice Manager (0)	Practice Manager (0)	2/7/2022	2/7/2023	
Product(s)						
DATE & TIME	ACTION	OPERATOR	PRODUCT	QUANTITY	PRICE	
2/7/2022 10:09 AM	Activated	Practice Manager (0)	Leptospirosis Vaccination - Annual	1.0000	\$17.00	
2/7/2022 10:09 AM	Activated	Practice Manager (0)	Fecal Exam, Direct	1.0000	\$45.00	
2/7/2022 10:09 AM	Activated	Practice Manager (0)	Bordetella Vaccination - Intranasal	1.0000	\$17.00	
2/7/2022 10:09 AM	Activated	Practice Manager (0)	Exam - Wellness	1.0000	\$94.05	
2/7/2022 10:09 AM	Activated	Practice Manager (0)	DA2PP Vaccination - Annual	1.0000	\$21.00	

Database

Patient Count by Breed

This report will display count totals of patients by breed for the selected species.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com	Patient Count by Breed
Equine	
Quarter Horse	20
(None)	7
Arabian	7
Paint	4
Clydesdale	0
Friesian	0
Morgan	0
Thoroughbred	0
<i>Total Number of Patients: 38</i>	
Reptile	
Lizard	1
(None)	0
<i>Total Number of Patients: 1</i>	

Patient List by Stable

This report displays a list of patients for the selected Stable including the client's current accounts receivable balance.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com		Patient List by Stable Big Rock Stables			
Patient Name	Client Account ID	Client Name	Ownership	Client Type	Current A/R Balance
Another Mans Treasure					
	21	Kayla Thorn	100.000 %	Small Animal Client	\$90.23
Big Band Sound					
	7	Conley Frank	100.000 %	Small Animal Client	\$234.39
Daretime					
	24	Eric Cullen	100.000 %	Small Animal Client	\$860.28
Holly					
	45	Anna Foley	100.000 %	Small Animal Client	\$0.00
In The Breeze					
	20	Tyler Olson	100.000 %	Small Animal Client	\$598.37
Pi					
	26	Bella Carter	50.000 %	Equine	\$639.16
	29	Misty Meadow	50.000 %	Small Animal Client	\$271.53
Pretty In Pearls					
	24	Eric Cullen	100.000 %	Small Animal Client	\$860.28
Stout					
	45	Anna Foley	100.000 %	Small Animal Client	\$0.00
Warrier					
	49	Gordon Freeman	100.000 %	Small Animal Client	\$432.98

Patients with Blank Reminders

This report displays a list of patients with reminders that are blank.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@impromed.com www.impromed.com	Patients with Blank Reminders
<u>Anderson, Ray (35)</u> Home Phone:(920) 555-3792 Email Address:randerson@email.com Patient:Diamond (A) Reminders: West Nile Patient:Ruby (B) Reminders: West Nile	
<u>Augsburger, Vernon (5)</u> Home Phone:(920) 685-5127 Email Address:va@gmail.com Patient:Lee (A) Reminders: FeLV/FIV Test Patient:Lee Lee (B) Reminders: FeLV/FIV Test	
<u>Bernico, Kim (6)</u> Home Phone:(920) 555-6462 Email Address:jt7@gmail.com Patient:Clara (A) Reminders: Heartworm Test	
<u>Briskie, Wendy (38)</u> Home Phone:(800) 925-7171 Email Address: Patient:Dog (A) Reminders: Heartworm Test	

ENHANCED REPORTS

Visits by Species

This report will show the number of patients seen broken down by species for the year(s) selected.

ImproMed Veterinary Clinic		Visits by Species	
304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			
YEAR	SPECIES	NUMBER OF PATIENTS	
2020			
	Canine		4
		Total:	4
2021			
	Canine		11
	Equine		1
		Total:	12
2022			
	Canine		6
	Equine		1
	Feline		1
		Total:	8

ENHANCED REPORTS

Year-to-Date Totals (Specific Client)

This report displays the year-to-date totals for the selected client for the selected year. The Year End Procedure utility must have been run as intended.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Year-to-Date Totals (Specific Client) (2020)	
CLIENT	YTD VISITS	YTD SALES	YTD REFERRALS
Folsum, Grace (30)	20	\$5,946.84	0

Year-to-Date Totals by Client

This report displays a list of all clients and their YTD Total Sales for the year selected. The Year End Procedure utility must have been run as intended.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Year-to-Date Totals by Client (2020)	
CLIENT	YTD VISITS	YTD SALES	YTD REFERRALS
Anderson, Ray (35)	2	\$98.39	0
Augsburger, Vernon (5)	2	\$178.65	0
Billboard (17)	0	\$0.00	1
Carter, Bella (26)	4	\$262.39	0
Conley, Frank (7)	11	\$1,409.52	0

Inventory

Inventory - Last Purchased Date

This report will display all inventory items for the inventory categories selected sorted by last purchased date.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com					Inventory - Last Purchased Date
Category: Antibiotic/Antibacterial Meds					
Code	Inventory Item Name	Create Date	Unit Cost	Last Received Date	
M3001	Amiglyde-V 50mg/ml (Amikacin)	12/30/2004	\$0.00	10/13/2017	
M3012	Amoxicillin 125mg Chewable Tablet	12/31/2004	\$0.00	10/13/2017	
M3013	Amoxicillin 250mg Capsule	12/31/2004	\$0.00	10/13/2017	
M3014	Amoxicillin 500mg Capsule	12/31/2004	\$0.00	10/13/2017	
M3016	Amoxi-Drops 50mg/ml 15ml Bottle	12/31/2004	\$0.00	10/13/2017	
M3017	Amoxi-Drops 50mg/ml 30ml Bottle	12/31/2004	\$0.00	10/13/2017	
M3018	Ampicillin Trihydrate Injection 1000mg	12/31/2004	\$0.00	10/13/2017	
M3026	Antirobe 150mg (Clindamycin)	12/31/2004	\$0.00	10/13/2017	
M3024	Antirobe 25mg (Clindamycin)	12/31/2004	\$0.00	10/13/2017	
M3025	Antirobe 75mg (Clindamycin)	12/31/2004	\$0.00	10/13/2017	
M3027	Antirobe Aquadrops 25mg/ml (Clindamycin)	12/31/2004	\$0.00	10/13/2017	
M3053	Baytril Inj 22.7mg/ml (Enrofloxacin)	12/31/2004	\$0.00	10/13/2017	
M3028	Cefa-Drops 15ml 50mg/ml (Cefadroxil)	12/31/2004	\$0.00	10/13/2017	

Inventory Category Details

Run this report to view lots, quantity on hand, unit cost, and total cost of inventory items. This report can be run for a single category or all categories.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com						Inventory Category Details	
ImproMed							
Anti-Inflamm/Histamine Meds							
Inventory Name			Code	Unit of Measure			
Adequan 1ml			M3233	ml(s)			
Lot ID	Expiration	Quantity on Hand	Unit Cost	Total Cost			
2	1/1/2005	5.0000	\$1.5000	\$7.5000			
Totals For Adequan 1ml		5.0000		\$7.5000			
Inventory Name			Code	Unit of Measure			
AMOXICILLIN CAP 250MG GNR 500 DAV			035910	mg			
Lot ID	Expiration	Quantity on Hand	Unit Cost	Total Cost			
1	1/1/2005	100.0000	\$0.0000	\$0.0000			
Totals For AMOXICILLIN CAP 250MG GNR 500 DAV		100.0000		\$0.0000			
Inventory Name			Code	Unit of Measure			
Benadryl Inj 50mg/ml (Diphenhydramine)			M3208	ml(s)			
Lot ID	Expiration	Quantity on Hand	Unit Cost	Total Cost			
1	1/1/2005	500.0000	\$0.0000	\$0.0000			
Totals For Benadryl Inj 50mg/ml (Diphenhydramine)		500.0000		\$0.0000			
Inventory Name			Code	Unit of Measure			
Dexamethasone .25mg			M3273	Tab(s)			
Lot ID	Expiration	Quantity on Hand	Unit Cost	Total Cost			
Out Of Stock Bin	1/5/2005	-1.0000	\$0.0387	(\$0.0387)			
Totals For Dexamethasone .25mg		-1.0000		(\$0.0387)			

ENHANCED REPORTS

Inventory Moved (Category)

Displays inventory moved from one storage location to another filtered by inventory category.

Inventory Moved (Category)							
1/3/2022 - 2/11/2022							
DESCRIPTION	CODE	DATE	EMP	FROM	TO	QTY	COST
INVENTORY MOVED - FROM - ImproMed Veterinary Clinic - Default Storage Location TO - ImproMed Veterinary Clinic - Mobile Van							
Acemannan Injection 10mg	M3801	2/10/2022	0	Lot ID: 6	Lot ID: 7	100	\$26.5400
Change In Value						100	\$26.5400
Amoxicillin 250mg Capsule	M3013	2/10/2022	0	Lot ID: 1	Lot ID: 3	250.00	\$125.0000
Change In Value						250.00	\$125.0000
Cosequin Chews DS 120-Ct	M4375	2/10/2022	0	Lot ID: 2	Lot ID: 4	250.00	\$125.0000
Change In Value						250.00	\$125.0000
Total Change In Value: ImproMed Veterinary Clinic - Default Storage Location TO - ImproMed Veterinary Clinic - Mobile Van							\$276.5400

Inventory Moved (Item)

This report will display inventory that was moved from one storage location to another filtered by inventory item name.

Inventory Moved (Item)							
1/3/2022 - 2/11/2022							
DESCRIPTION	CODE	DATE	EMP	FROM	TO	QTY	COST
INVENTORY MOVED - FROM - ImproMed Veterinary Clinic - Default Storage Location TO - ImproMed Veterinary Clinic - Mobile Van							
Acemannan Injection 10mg	M3801	2/10/2022	0	Lot ID: 6	Lot ID: 7	100	\$26.5400
Change In Value						100	\$26.5400
Amoxicillin 250mg Capsule	M3013	2/10/2022	0	Lot ID: 1	Lot ID: 3	250.00	\$125.0000
Change In Value						250.00	\$125.0000
Cosequin Chews DS 120-Ct	M4375	2/10/2022	0	Lot ID: 2	Lot ID: 4	250.00	\$125.0000
Change In Value						250.00	\$125.0000
Total Change In Value: ImproMed Veterinary Clinic - Default Storage Location TO - ImproMed Veterinary Clinic - Mobile Van							\$276.5400

Invoicing

Average Invoice Amount

The Average Invoice Amount provides the average invoice dollar amounts for each selected year.

ImproMed Veterinary Clinic			Average Invoice Amount
304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			
<u>YEAR</u>	<u>GROSS REVENUE</u>	<u># OF INVOICES</u>	<u>AVERAGE INVOICE</u>
2020	\$612.00	20	\$30.60
2021	\$5,300.87	19	\$278.99
2022	\$2,058.44	10	\$205.84
Totals:	\$7,971.31	49	\$515.44

Message Center

Active Messages

This report will display all read and unread messages meeting the criteria set by the user.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com				Active Messages Tuesday, February 1, 2022 at 12:00 AM to Thursday, February 17, 2022 at 11:59 PM	
ImproMed Veterinary Clinic					
Dr. Dan Bonnett (1) (Doctors)					
CREATED	LAST MODIFIED	CLIENT	PATIENT	CONTACT PHONE	TYPE
2/15/2022 7:03 AM	2/15/2022 7:05 AM	Grace Folsum #30	Nai'a (D)	(920) 555-5210	In Progress
Please call Grace Folsum. She has additional questions/concerns re: TPLO surgery as discussed with you for her dog, Nai'a.					
2/15/2022 7:01 AM	2/15/2022 7:01 AM	Frank Conley #7	Tankette (B)	(920) 555-5551	OPEN
Please call Frank Conley to discuss lab results for Tankette.					
Rick Footit (5) (Technician)					
CREATED	LAST MODIFIED	CLIENT	PATIENT	CONTACT PHONE	TYPE
2/15/2022 7:01 AM	2/15/2022 7:04 AM	Anna Foley #45	Holly (A)	() -	In Progress
Anna Foley would like to speak with you re: grooming tips for ears and nails for her dog, Holly.					
Dr. Lisa Lanzo (2) (Doctors)					
CREATED	LAST MODIFIED	CLIENT	PATIENT	CONTACT PHONE	TYPE
2/15/2022 7:04 AM	2/15/2022 7:04 AM	Kayla Thorn #21	Bucky (B)	() -	OPEN
Kayla Thorn would like you to call back regarding Bucky. Has concerns regarding scratching.					

Products

Product List - Last Sold Date

Run this report to get a handle on the last time a product was sold. This report will break the products down by Category and it will display the Last Invoiced Date. You may want to consider removing those items that do not have an invoice date or haven't been sold in years.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com		Product List - Last Sold Date		
Category: Anesthesia Service				
Code	Product Name	Create Date	Practice Price	Last Invoiced Date
A905	Carbocaine 2%	3/6/2005	\$55.00	N/A
A909	Epidural	3/6/2005	\$55.00	N/A
A904	Induction - IV	5/4/2012	\$59.40	N/A
A910	Inhalant - Isoflurane 60 Minutes	5/4/2012	\$59.40	N/A
A913	Inhalant - Isoflurane 60 Minutes Added	5/4/2012	\$59.40	N/A
A912	Inhalant - Sevoflurane	3/21/2009	\$55.00	N/A
A906	Intubation	5/4/2012	\$59.40	N/A
A925	Oxygen Therapy per 15 min.	3/6/2005	\$55.00	N/A
A931	Respirator Services	3/6/2005	\$55.00	N/A
A903	Sedation - Preanesthetic	5/4/2012	\$59.40	N/A
A923	Local Anesthesia	3/6/2005	\$59.40	11/26/2012
A902	Sedation	5/4/2012	\$59.40	11/26/2012
A911	Inhalant - Isoflurane 30 Minutes	3/6/2005	\$59.40	7/25/2014
A914	Anesthetic Monitoring Fee - Manual	5/4/2012	\$59.40	12/1/2015
B4	Pain Medications	5/17/2013	\$59.40	1/23/2018
B2	Anesthetic/Sedation Medications	5/10/2013	\$59.40	2/21/2018
A924	Anesthetic Monitoring Fee - Electronic	3/6/2005	\$59.40	8/13/2018

Product Statistics by Employee

The reports displays employee product statistics per product category for the selected products for the selected practices for the selected date range.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Product Statistics By Employee Monday, January 4, 2021 to Friday, February 11, 2022			
CODE	DESCRIPTION	TOTAL QTY	INSTANCE	AMOUNT	%
Category: Anesthesia Service					
A924 Anesthetic Monitoring Fee - Electronic					
	Lanzo, Dr. Lisa	2	1	\$59.40	100.00
	Total: Anesthetic Monitoring Fee - Electronic		1	\$59.40	
Category Total: Anesthesia Service				\$59.40	
Category: Anti-Inflamm/Histamine Meds					
M3262 *Tramadol					
	Lanzo, Dr. Lisa	2	30.00	\$15.00	100.00
	Total: *Tramadol		30.00	\$15.00	
Category Total: Anti-Inflamm/Histamine Meds				\$15.00	
Category: Dentistry					
T203 Dental Scaling/Polish Canine					
	Bonnett, Dr. Dan	1	1	\$86.00	50.00
	Lanzo, Dr. Lisa	2	1	\$86.00	50.00
	Total: Dental Scaling/Polish Canine		2	\$172.00	

Products Invoiced by Employee

The Products Invoiced by Employee has two versions of this report: Date Completed and Date Performed. Both reports display a listing of products invoiced for the selected employee. When product notes are attached (by default or manually added during invoicing), they are included within this report.

Below is a sample of the report by Date Completed.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com		Products Invoiced - Employee (Date Completed) Monday, January 01, 2018 to Wednesday, May 08, 2019					
Client Account ID	Client Name Patient Name	Product Code	Product Name Product Notes	Date Completed	Price	Employee	Last Modified Cashier
7	Conley Frank Tankette	M4019	Mometamax 30gm	1/30/2018	\$44.11	Dr. Dan Bonnett DVM	0
7	Conley Frank Tankette	E330	Exam - Medical/Sick Pet	1/30/2018	\$77.40	Dr. Dan Bonnett DVM	0
11	Robert Gill Zoey	SR1602	Abscess - Major	1/23/2018	\$66.25	Dr. Dan Bonnett DVM	0
11	Robert Gill Zoey	D824	Radiograph(s) - 3 Views	1/23/2018	\$140.00	Dr. Dan Bonnett DVM	0
11	Robert Gill Zoey	E330	Exam - Medical/Sick Pet	1/23/2018	\$86.00	Dr. Dan Bonnett DVM	0
11	Robert Gill Zoey	T216	Oral Surgery (Dental Related)	1/23/2018	\$300.00	Dr. Dan Bonnett DVM	0
11	Robert Gill Zoey	A924	Anesthetic Monitoring Fee - Electronic	1/23/2018	\$34.13	Dr. Dan Bonnett DVM	0
30	Grace Folsom Fiona	L658	Ear Cytology	2/22/2018	\$21.00	Dr. Dan Bonnett DVM	3

Products Invoiced by Employee for a Specific Client

This report shows a listing of the products invoiced under selected employee(s) for the specific client. Items selected will also fall under the date range defined when the report is generated. All patients, owned by the specific client, seen during the selected date range are selected with this report.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Products Invoiced - Employee (Specific Client) 49 Gordon Freeman Monday, January 3, 2022 to Friday, February 11, 2022					
Patient Account ID	Patient Name	Product Code	Product Name Product Notes	Date Completed	Price	Employee	Last Modified Cashier
A	Sherlock	V545	Leptospirosis Vaccination - Annual It is not uncommon for a dog to be a little sleepy or not as active after a vaccination. Sometimes they will be sore where the injection was given. Abnormal reactions to vaccines include swollen eyelids or lips and difficulty breathing or swallowing. Please call the clinic if you notice any of these symptoms.	2/10/2022	\$17.00	Dr. Lisa Lanzo DVM	0
A	Sherlock	T203	Dental Scaling/Polish Canine	2/10/2022	\$86.00	Dr. Lisa Lanzo DVM	0
A	Sherlock	V537	Rabies Vaccination - Annual (Canine) It is not uncommon for a dog to be a little sleepy or not as active after a vaccination. Sometimes they will be sore where the injection was given. Abnormal reactions to vaccines include swollen eyelids or lips and difficulty breathing or swallowing. Please call the clinic if you notice any of these symptoms.	2/10/2022	\$16.00	Dr. Lisa Lanzo DVM	0

Products Invoiced (Stable)

This report will display products invoiced for the selected stable.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com					Products Invoiced (Stable) Sunday, December 12, 2021 to Thursday, February 10, 2022 Big Rock Stables			
Client Account ID	Patient ID	Patient Name	Product Category	Product Code	Product Name	Date Performed	Total Price	Employee
45	A	Holly	Surgical Services	CS	*Canine Spay/Neuter	1/12/2022	\$600.00	Dr. Dan Bonnett DVM
45	A	Holly	Pet Accessories	PD5892	Hills Canine c/d 40 lb	2/7/2022	\$136.40	Dr. Dan Bonnett DVM
45	A	Holly	Surgical Services	SURG	*Surgery - Spay or Neuter	2/10/2022	\$0.00	Dr. Lisa Lanzo DVM
45	A	Holly	Anti-Inflamm/Histamine Meds	M3262	*Tramadol	2/10/2022	\$15.00	Dr. Lisa Lanzo DVM
45	A	Holly	Anesthesia Service	A924	Anesthetic Monitoring Fee - Electronic	2/10/2022	\$59.40	Dr. Lisa Lanzo DVM
45	A	Holly	Surgical Services	CASP	Canine Spay	2/10/2022	\$300.00	Dr. Lisa Lanzo DVM
45	B	Stout	Laboratory Services	L627	CBC (Complete Blood Count)	1/10/2022	\$127.50	Dr. Dan Bonnett DVM
Total for Stable:							\$1,238.30	

Products Invoiced in Combination

This report will display products invoiced in combination with a specified product to evaluate commonly sold items or lost opportunities.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com		Products Invoiced in Combination Friday, January 1, 2021 to Thursday, February 10, 2022 For: *Tramadol		
CODE	PRODUCT NAME	TOTAL QTY	AVG QTY	INSTANCES
SURG	*Surgery - Spay or Neuter	1	1	1
A924	Anesthetic Monitoring Fee - Electronic	1	1	1
CASP	Canine Spay	1	1	1

ENHANCED REPORTS

Top Products Sold (Instance)

The Top Products Sold by Instance shows a list of products invoiced by the number of instances. A bar graph is included to visually see how your top ten products are producing. Easily see how many times a product is performed instead of how many times it was simply invoiced.

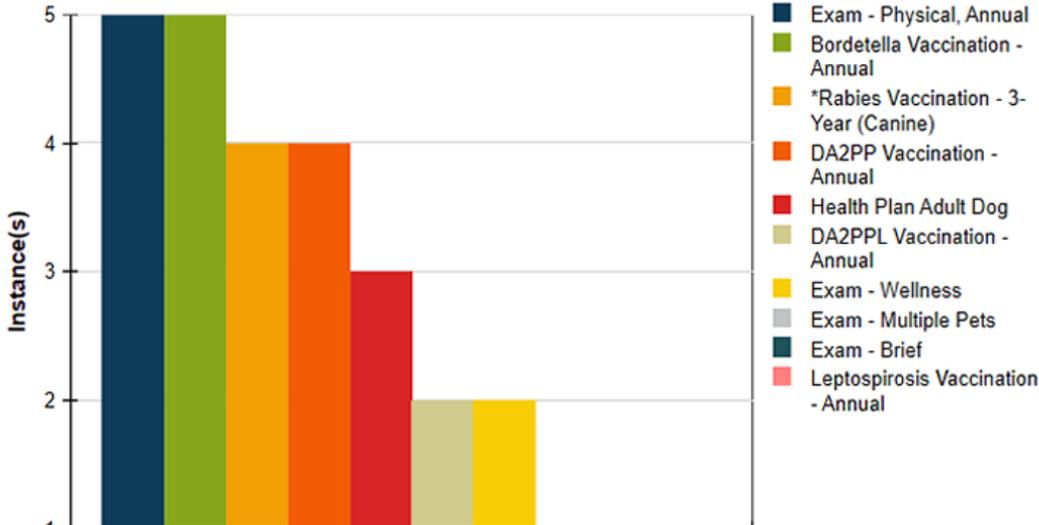
ImproMed Veterinary Clinic
 304 Ohio St
 Oshkosh, WI 54902
 800-555-1234
 800-555-1235
 info@impvetclinic.com
 www.impvetclinic.com

Top Products Sold (Instance)
 Friday, January 1, 2021
 to
 Friday, December 31, 2021

CODE	PRODUCT NAME	CATEGORY	GROSS	NET	INSTANCE(S)
V500	Bordetella Vaccination - Annual	Vaccinations	\$279.50	\$263.09	5
E301	Exam - Physical, Annual	Examinations	\$410.00	\$410.00	5
V538	*Rabies Vaccination - 3-Year (Canine)	Vaccinations	\$261.50	\$253.88	4
V520	DA2PP Vaccination - Annual	Vaccinations	\$262.50	\$250.30	4
HP3	Health Plan Adult Dog	Examinations	\$525.00	\$525.00	3
V510	DA2PPL Vaccination - Annual	Vaccinations	\$114.00	\$106.70	2
E333	Exam - Wellness	Examinations	\$39.60	\$39.60	2
P446	Ear Flush	Professional Services	\$50.00	\$50.00	1
E304	Exam - Brief	Examinations	\$73.00	\$73.00	1
E323	Exam - Multiple Pets	Examinations	\$73.00	\$73.00	1
V545	Leptospirosis Vaccination - Annual	Vaccinations	\$17.00	\$14.58	1
V532	Lyme Vaccination - Annual	Vaccinations	\$24.00	\$10.09	1

Total Instances: 30.00

Top 10 Products Sold (Instance)



ENHANCED REPORTS

Top Products Sold (Net)

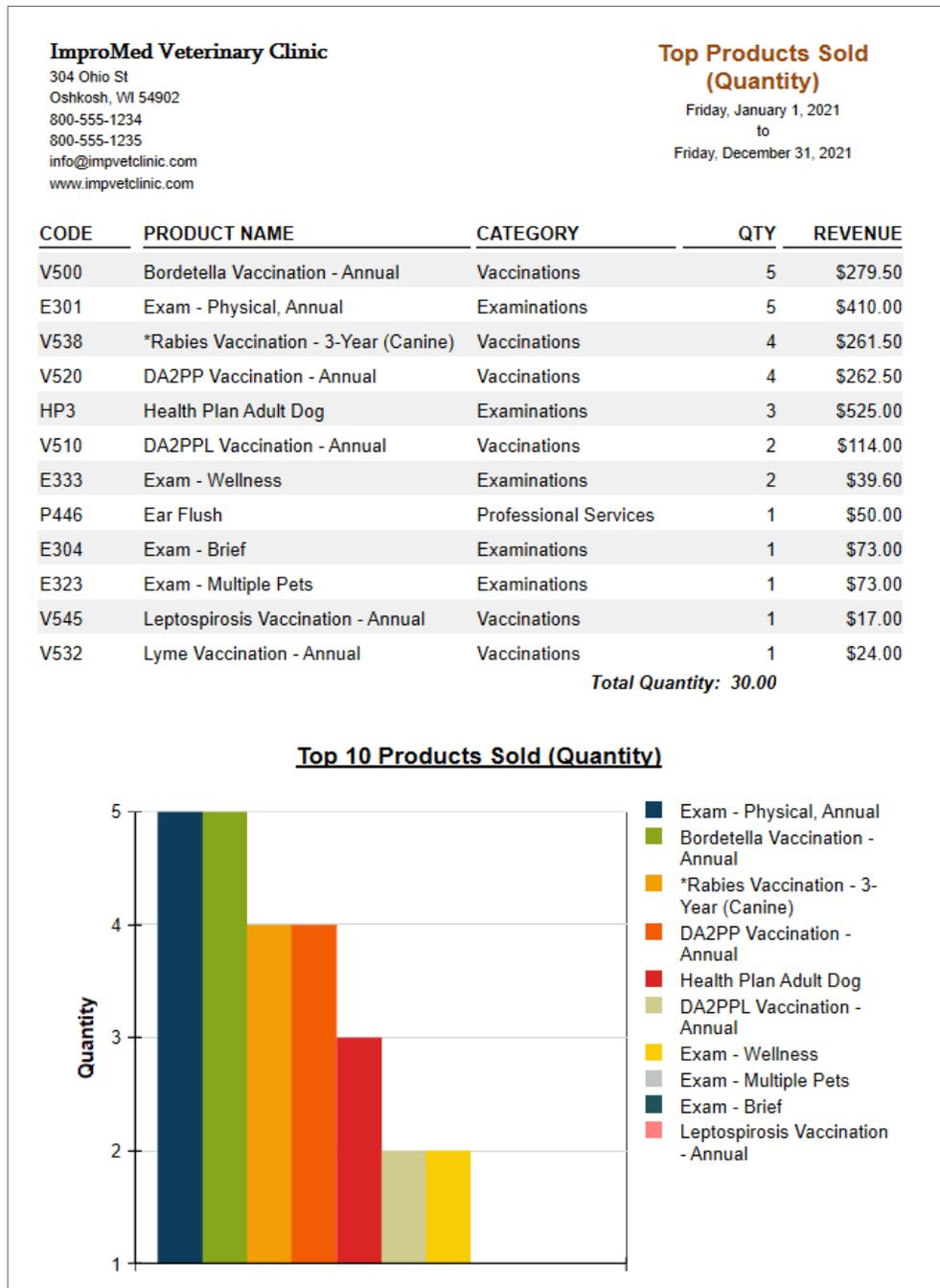
This report displays a list of product sold during a specified date range then sorted by net total.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Top Products Sold (Net) Friday, January 1, 2021 to Friday, December 31, 2021			
CODE	PRODUCT NAME	CATEGORY	QTY	GROSS	INSTANCE(S)	NET
V500	Bordetella Vaccination - Annual	Vaccinations	5	\$279.50	5	\$263.09
V538	*Rabies Vaccination - 3-Year (Canine)	Vaccinations	4	\$261.50	4	\$253.88
V520	DA2PP Vaccination - Annual	Vaccinations	4	\$262.50	4	\$250.30
V510	DA2PPL Vaccination - Annual	Vaccinations	2	\$114.00	2	\$106.70
854	Thyroid Panel 3-Canine	IDEXX VetConnect	1	\$66.83	1	\$25.83
V545	Leptospirosis Vaccination - Annual	Vaccinations	1	\$17.00	1	\$14.58
804	T4, Total	IDEXX VetConnect	1	\$37.49	1	\$14.49
V532	Lyme Vaccination - Annual	Vaccinations	1	\$24.00	1	\$10.09
M4109	Ketamine HCl 100mg/ml	Tranq/Anes/Analgesic Meds	5.00	\$31.45	1	\$0.00
723	Heartworm Antigen by ELISA-Canine	IDEXX VetConnect	2	\$0.00	2	(\$20.00)
						Total Net: \$918.96

ENHANCED REPORTS

Top Products Sold (Quantity)

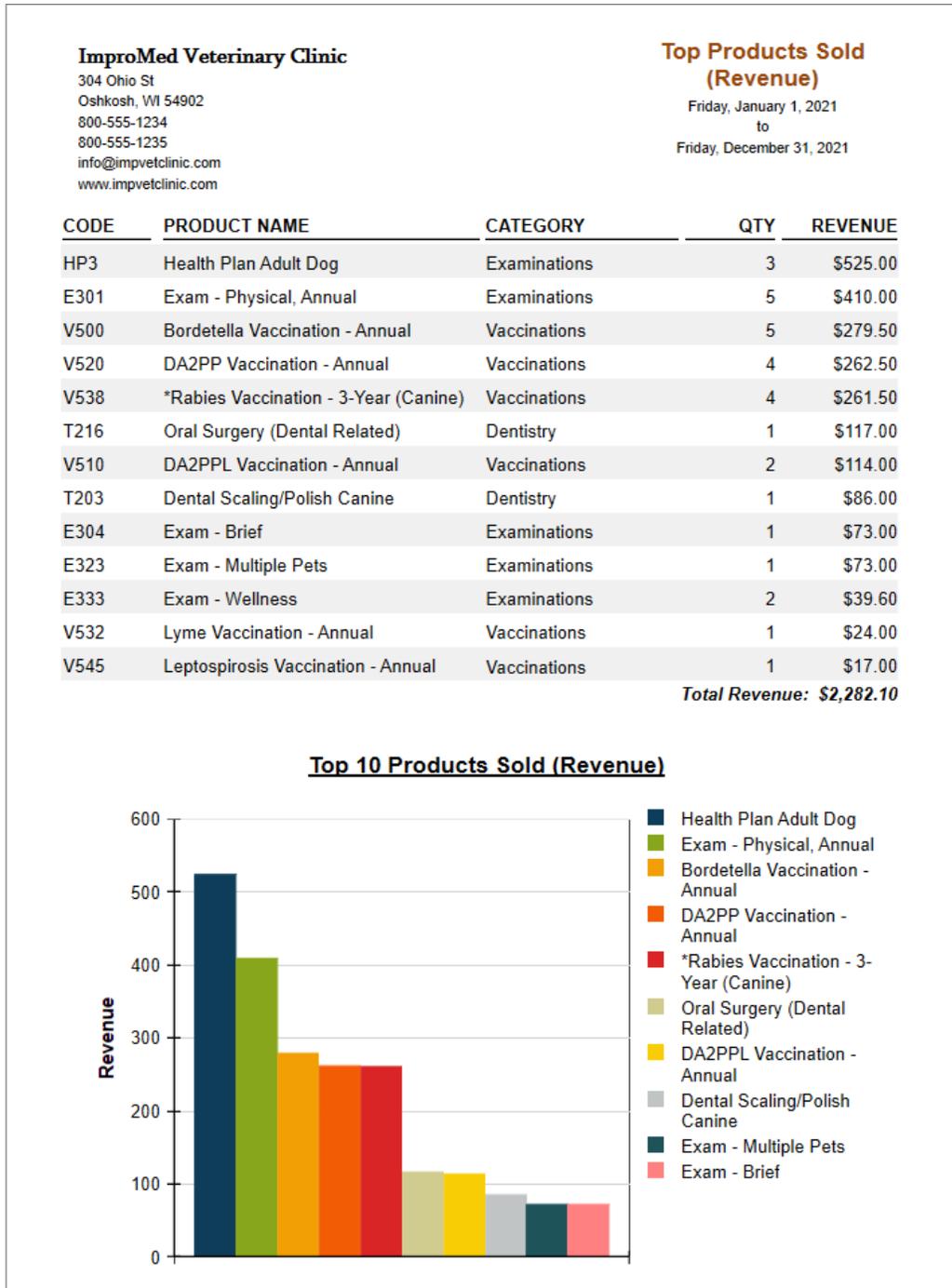
This report is useful to run as you keep an eye on your revenue. The report will show the top products sold, the quantity sold for the date range of the report, and the revenue received from the sales. If the revenue is not what you expected, make adjustments to the product pricing.



ENHANCED REPORTS

Top Products Sold (Revenue)

Products sold are displayed based the category selected for the date range selected then sorted by revenue. A bar chart will also display at the end of the report.



Revenue

Revenue (New Clients)

This report displays total revenue attributed to new clients first visit date within the year selected.

ImproMed Veterinary Clinic		Revenue (New Clients)			
304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com					
YEAR	# OF CLIENTS	TOTAL PRODUCTS	TAXES	GROSS REVENUE	
2020	1	\$63.00	\$0.00	\$63.00	
2022	0	\$0.00	\$0.00	\$0.00	
Totals:	1	\$63.00	\$0.00	\$63.00	

Revenue (Repeat Clients)

The Revenue of Repeat Clients shows a list of gross revenue from clients who have multiple visits during the same year. The report includes the total number of clients, total products sold, taxes, and the gross revenue for the selected years and businesses.

ImproMed Veterinary Clinic		Revenue (Repeat Clients)			
304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com					
YEAR	# OF CLIENTS	TOTAL PRODUCTS	TAXES	GROSS REVENUE	
2020	1	\$63.00	\$0.00	\$63.00	
2021	3	\$2,088.05	\$0.00	\$2,088.05	
2022	3	\$1,811.94	\$0.00	\$1,811.94	
Totals:	7	\$3,962.99	\$0.00	\$3,962.99	

Revenue (Returning Clients)

This report displays a list of gross revenue received from clients for the selected years who have repeated visits for consecutive years. This report includes total number of clients, net, taxes, and gross revenue for the selected years and businesses.

ImproMed Veterinary Clinic			Revenue (Returning Clients)	
304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com				
<u>YEAR</u>	<u># OF CLIENTS</u>	<u>TOTAL PRODUCTS</u>	<u>TAXES</u>	<u>GROSS REVENUE</u>
2020	0	\$0.00	\$0.00	\$0.00
2021	6	\$4,743.05	\$0.00	\$4,743.05
2022	3	\$506.00	\$0.00	\$506.00
Totals:	9	\$5,249.05	\$0.00	\$5,249.05

Revenue by Breed

This report will display the revenue brought in by breed for the date range entered.

ImproMed Veterinary Clinic
 304 Ohio St
 Oshkosh, WI 54902
 800-555-1234
 800-555-1235
 info@impvetclinic.com
 www.impvetclinic.com

Revenue by Breed
 Wednesday, January 1, 2020
 to
 Friday, December 31, 2021

Breed Name	Revenue
<u>Canine</u>	
Bull Mastiff	\$2,500.00
Newfoundland	\$1,489.05
Airedale Terrier	\$632.00
Mixed Breed	\$382.50
Golden Retriever	\$356.00
Coonhound	\$104.32
Basset Hound	\$90.00
Labrador Retriever	\$82.00
Shih Tzu	\$71.00
Irish Setter	\$58.00
Canine Total:	\$5,764.87

Revenue by Breed

Breed	Revenue
Bull Mastiff	2500.00
Newfoundland	1489.05
Airedale Terrier	632.00
Mixed Breed	382.50
Golden Retriever	356.00
Coonhound	104.32
Basset Hound	90.00
Labrador Retriever	82.00
Shih Tzu	71.00
Irish Setter	58.00

Revenue by Postal Code

This report will break down revenue earned based on the postal code for the selected date range.

Revenue by Postal Code

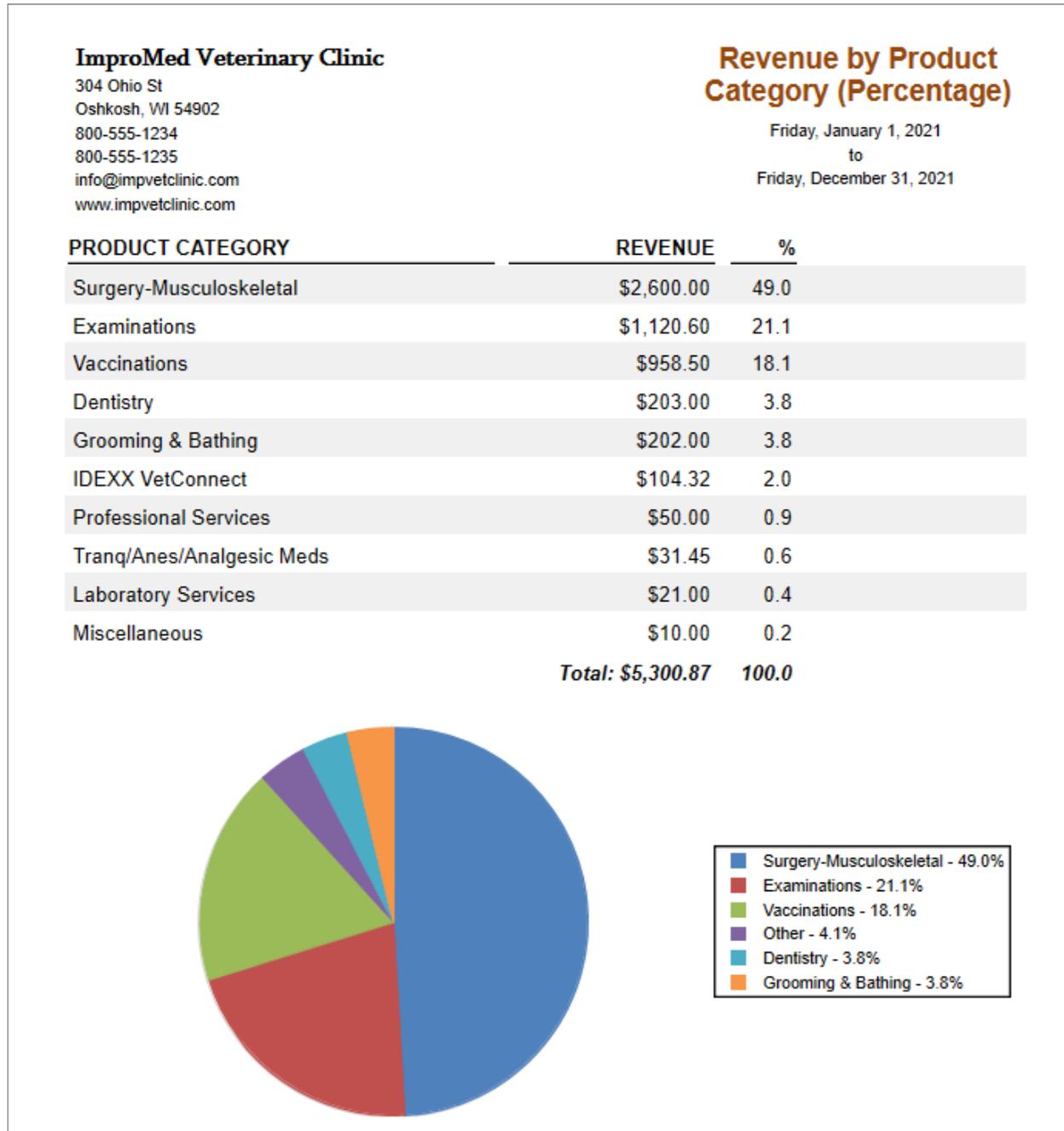
ImproMed Veterinary Clinic

304 Ohio St
Oshkosh, WI 54902
800-555-1234
800-555-1235
info@impvetclinic.com
www.impvetclinic.com

Zip Code	2020	2021	2022	Total
	\$5.00	\$0.00	\$0.00	\$5.00
54901	\$371.00	\$455.50	\$0.00	\$826.50
54902	\$133.00	\$2,069.05	\$387.00	\$2,589.05
54903	\$63.00	\$104.32	\$1,238.30	\$1,405.62
54935	\$5.00	\$82.00	\$0.00	\$87.00
54956	\$15.00	\$0.00	\$314.14	\$329.14
54963	\$15.00	\$2,500.00	\$0.00	\$2,515.00
92626	\$5.00	\$90.00	\$119.00	\$214.00

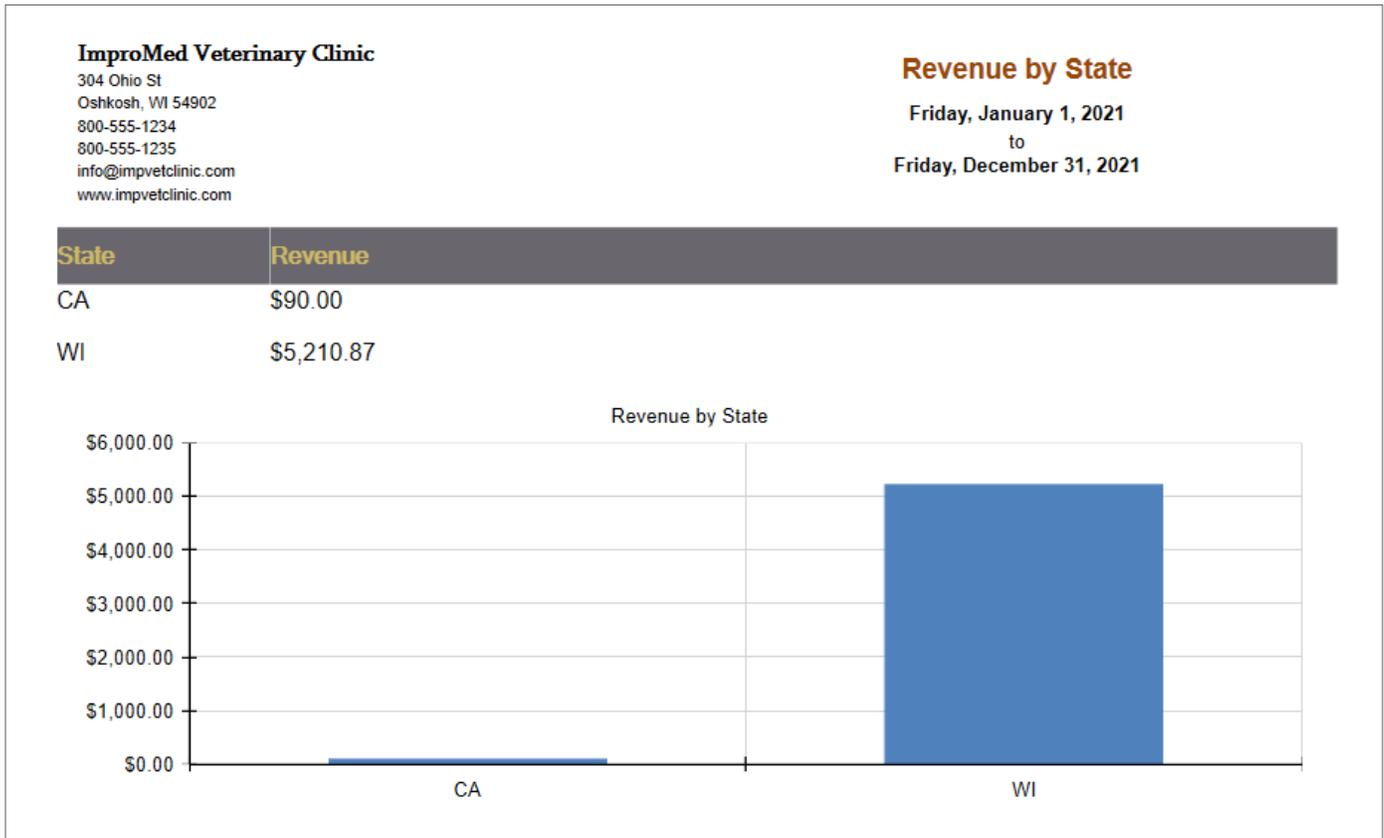
Revenue by Product Category (Percentage)

Revenue is displayed by Product Category in a percentage format.



Revenue by State

Total revenue is displayed by state for the date range defined.



Revenue Per Patient (Specific Client)

In this report, learn how a client spends their money in your practice. By breaking down the revenue per patient for a specific client, business owners can gain revenue knowledge about the client and market to specific needs.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com	Revenue per Patient (Specific Client) Friday, January 1, 2021 to Monday, February 14, 2022	
Client: Folsom, Grace (30)		
PATIENT NAME	PATIENT ID	TOTAL REVENUE
Fiona	C	\$342.30
Nai'a	D	\$674.80
		Total Revenue: \$1,017.10

Scheduled Payments

Cards on File - Expiring by Date

This report will display all clients who have a card on file expiring in the specified date range.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@improved.com www.improved.com		Cards on File Expiring by Date Thursday, January 01, 2015 to Wednesday, May 08, 2019		
CLIENT NAME	PHONE NUMBER	CARD NAME	CARD NUMBER	EXP. DATE
Eric Cullen #24		Visa	XXXX-XXXX-XXXX-0010	12/1/2018
Grace Folsom #30	(920) 555-1199	Visa	XXXX-XXXX-XXXX-0010	12/1/2018
Robert Gill #11	(920) 303-0874	Visa	XXXX-XXXX-XXXX-0010	12/1/2018
Sally Stone #4	(920) 555-6497	Visa	XXXX-XXXX-XXXX-0010	12/1/2018

Wellness Plan

Wellness Plans - Active by Date

This report will show all plans active by their start date.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com						Wellness Plans Active Report	
Senior Wellness							
NAME	DURATION	START DATE	END DATE	LAST VISIT DATE	TOTAL PRICE	AMOUNT PAID	VALUE OF ITEMS USED
Claire Jenkins #48 - Eden Anne Jenkins #48B							
	12 Month(s)	11/30/2021	11/30/2022	1/13/2022	\$97.80	\$97.80	\$0.00
Silver							
NAME	DURATION	START DATE	END DATE	LAST VISIT DATE	TOTAL PRICE	AMOUNT PAID	VALUE OF ITEMS USED
Kayla Thorn #21 - Bucky Thorn #21B							
	12 Month(s)	2/7/2022	2/7/2023	2/9/2022	\$194.05	\$194.05	\$0.00

Wellness Plans - Active by Stable

Displays all active wellness plans by stable, including instances used, allowed, and benefit details.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Wellness Plans Active by Stable		
(None)					
Bucky (Kayla Thorn #21)			Trainer: (None)		
Silver			End Date: 2/7/2023		
<u>PRODUCT NAME</u>	<u>INSTANCES ALLOWED</u>	<u>INSTANCES USED</u>			
Bordetella Vaccination - Intranasal	1	0			
DA2PP Vaccination - Annual	1	0			
Exam - Wellness	1	0			
Fecal Exam, Direct	1	0			
Leptospirosis Vaccination - Annual	1	0			
Eden Anne (Claire Jenkins #48)			Trainer: (None)		
Senior Wellness			End Date: 11/30/2022		
<u>PRODUCT NAME</u>	<u>INSTANCES ALLOWED</u>	<u>INSTANCES USED</u>			
Senior Screen Comprehensive CBC	1	0			
<u>BENEFIT NAME</u>	<u>DISCOUNT PERCENT</u>	<u>INSTANCES USED</u>			
Food - Retail	10.0000%	0			

Wellness Plans - Detailed

The report displays all active wellness plan including instances used, allowed, and benefit details.

ImproMed Veterinary Clinic
 304 Ohio St
 Oshkosh, WI 54902
 800-555-1234
 800-555-1235
 info@impvetclinic.com
 www.impvetclinic.com

**Wellness Plans -
Detailed**

Client: Claire Jenkins #48

Patient: Eden Anne

Plan: Senior Wellness **End Date: 11/30/2022**

<u>Product Name</u>	<u>Instances Allowed</u>	<u>Instances Used</u>
Senior Screen Comprehensive CBC	1	0

<u>Benefit Name</u>	<u>Discount Percent</u>	<u>Instances Used</u>
Food - Retail	10.0000%	0

Client: Kayla Thorn #21

Patient: Bucky

Plan: Silver **End Date: 2/7/2023**

<u>Product Name</u>	<u>Instances Allowed</u>	<u>Instances Used</u>
Bordetella Vaccination - Intranasal	1	0
DA2PP Vaccination - Annual	1	0
Exam - Wellness	1	0
Fecal Exam, Direct	1	0
Leptospirosis Vaccination - Annual	1	0

ENHANCED REPORTS

Wellness Plans - Expiring by Date

This report will display wellness plan expiring within a specified date range.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Wellness Plans Expiring Friday, January 1, 2021 to Friday, December 31, 2021			
CLIENT NAME	PATIENT NAME	PLAN NAME	END DATE	TOTAL PRICE	AMOUNT PAID	VALUE OF ITEMS USED
Ann & Ben Foley #52 (920) 866-3105	Bernie Smith #55C (Reminders Due) 30.0000%	Platinum	12/21/2021	\$1,168.86	\$0.00	\$0.00
John Smith #55	Bernie Smith #55C (Reminders Due) 70.0000%	Platinum	12/21/2021	\$2,727.35	\$2,727.35	\$0.00

Wellness Plans - Intercompany Reconciliation Report

This report displays deferred revenue balances for reconciling with multiple businesses.

ImproMed 304 Ohio St Oshkosh, WI 54902 800-925-7171 920-236-7070 info@impromed.com www.impromed.com			Wellness Plans - Intercompany Reconciliation Report Monday, January 01, 2018 at 12:00 AM to Wednesday, May 08, 2019 at 11:59 PM			
Practice: ImproMed Equine						
Products Sold at: ImproMed						
Wellness Plan: Equine						
DATE SOLD	CLIENT	PATIENT	INVOICE #	SERVICE	PRICE	
10/5/2018 9:58 AM	Anna Foley	Stout	790	Rabies Vaccination - Equine	\$20.00	
Total For Equine					\$20.00	
Wellness Plan: Equine						
DATE SOLD	CLIENT	PATIENT	INVOICE #	SERVICE	PRICE	
11/7/2018 8:07 AM	Bella Carter	Warship	795	Exam - Physical, Bi-Annual	\$82.00	
Total For Equine					\$82.00	
Wellness Plan: Equine						
DATE SOLD	CLIENT	PATIENT	INVOICE #	SERVICE	PRICE	
11/7/2018 8:26 AM	Gordon Freeman	Warrior	792	Exam - Physical, Bi-Annual	\$82.00	
Total For Equine					\$82.00	
Total For ImproMed					\$184.00	

ENHANCED REPORTS

Wellness Plans - Not Recently Used

This report displays all active wellness plans not used in a specified number of days.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Wellness Plans Not Recently Used Plan not used in over 365 days Monday, February 14, 2022		
CLIENT NAME	PATIENT NAME	PLAN NAME	DATE LAST USED	LATEST VISIT DATE	END DATE
Claire Jenkins #48	Eden Anne Jenkins #48B	Senior Wellness	Unused	11/30/2021	11/30/2022
Kayla Thorn #21	Bucky Thorn #21B	Silver	Unused	2/9/2022	2/7/2023

Wellness Plans - Sold

This report shows the plans that were sold for the date range selected.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com			Wellness Plans Sold Report Friday, January 1, 2021 to Monday, February 14, 2022		
Senior Wellness					
DATE SOLD	CLIENT NAME	PATIENT NAME	DURATION	EMPLOYEE	TOTAL PRICE
11/30/2021	Claire Jenkins #48	Eden Anne Jenkins #48B	12 Month(s)	Dr. Dan Bonnett (1)	\$97.80
					<i>Total for Senior Wellness: \$97.80</i>
Silver					
DATE SOLD	CLIENT NAME	PATIENT NAME	DURATION	EMPLOYEE	TOTAL PRICE
2/7/2022	Kayla Thorn #21	Bucky Thorn #21B	12 Month(s)	Practice Manager (0)	\$194.05
					<i>Total for Silver: \$194.05</i>
					Grand Total: \$291.85

Wellness Plans Sold by Employee

This report will come in handy for businesses who wish to see who is selling Wellness Plans. It can also provide the data needed if a business wants to pay bonuses to employees based on how much they sold.

ImproMed Veterinary Clinic 304 Ohio St Oshkosh, WI 54902 800-555-1234 800-555-1235 info@impvetclinic.com www.impvetclinic.com				Wellness Plans Sold by Employee Report Friday, January 1, 2021 to Monday, February 14, 2022	
Dr. Dan Bonnett (1)					1 Plan(s)
<u>DATE SOLD</u>	<u>WELLNESS PLAN</u>	<u>CLIENT NAME</u>	<u>PATIENT NAME</u>	<u>DURATION</u>	<u>TOTAL PRICE</u>
11/30/2021	Senior Wellness	Claire Jenkins #48	Eden Anne Jenkins #48B	12 Month(s)	\$97.80
<i>Total for Dr. Dan Bonnett (1): \$97.80</i>					
Practice Manager (0)					1 Plan(s)
<u>DATE SOLD</u>	<u>WELLNESS PLAN</u>	<u>CLIENT NAME</u>	<u>PATIENT NAME</u>	<u>DURATION</u>	<u>TOTAL PRICE</u>
2/7/2022	Silver	Kayla Thorn #21	Bucky Thorn #21B	12 Month(s)	\$194.05
<i>Total for Practice Manager (0): \$194.05</i>					
Grand Total: \$291.85					

History Tab

From the History tab, view the reports generated. Click on the View  icon to view the report that was printed or exported. Use the Search Filters panel to see generated reports that fit the filter criteria.

Search Filters

To reduce the number of reports on the History tab of Enhanced Reports, use the Search Filters panel to locate reports based on the filter criteria.

Search

Enter in the report Description. For example, to view Wellness Plan - Report Card reports, enter that as the search description in the search field. Click the Apply Filter button to see the reports that fit the criteria.

Operators

To view reports generated by specific operator(s), click in the (All) check box to quickly clear all operators. Proceed with checking the box(es) of operators who ran reports. Click the Apply Filter button to see the reports that fit the criteria.

Date

Filter reports based on the date generated. Choose dates from the drop-down list or choose Custom to enter a specified date range. Click the Apply Filter button to see the reports that fit the criteria.

Combine Filter Criteria

Filter reports on multiple criteria. For example, enter a report description, select operator(s), and specify a date range.

Clear Filter

Click on the Clear Filter button to return the Search Filters to default settings.