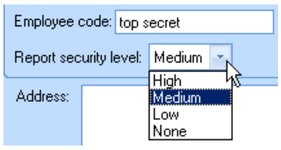
How do I...

Run a report listing clients that have and haven't purchased a certain product (FP19)

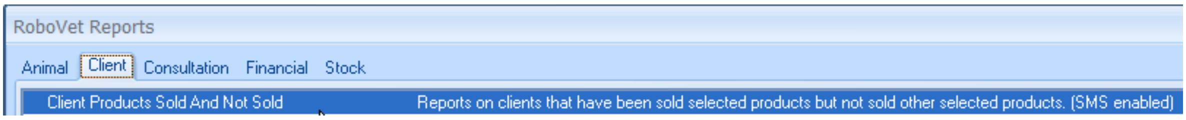
RoboVet Version: Feature Pack 19 but will be appropriate for any versions of RoboVet 5. Some earlier versions may not have all the filters and columns in the output grid.



Security Permissions: To run this report users must have the **Medium** level of **Report security**.

Running the Client Products Sold and Not Sold Report

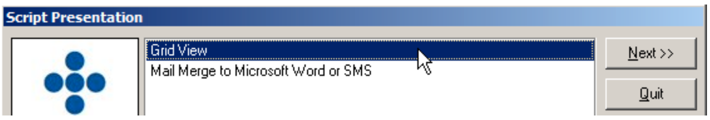
Click on **System** button then on **All Reports** and select the **Client Products Sold And Not Sold** report found in under the **Client** tab.



Note that this report is **SMS Enabled** which means that it will be possible to send a text to all the clients identified in the report.

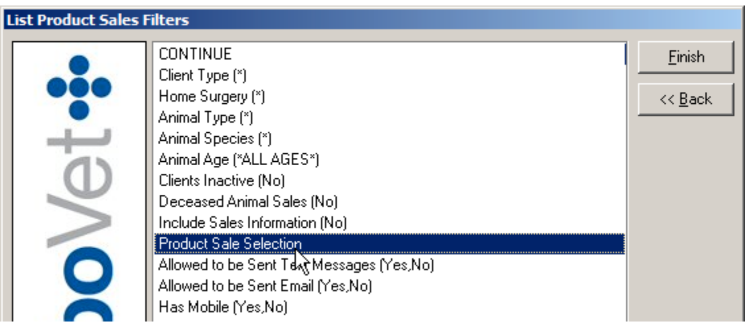
In this example we are going to create and a report all clients that purchased a flea treatment in 2014 and have not purchased a flea product in 2015 up to yesterday.

You can double click on the report or click on **Run** to start running the report.



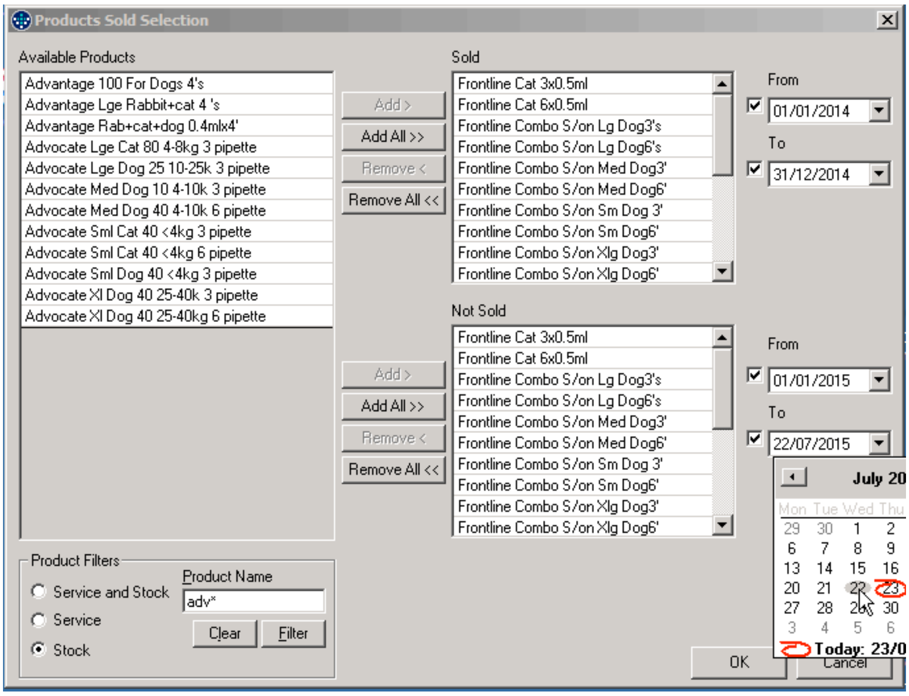
Click on **Next** so that the report will be in **Grid View**. Do not choose the **Mail Merge to Microsoft Word or SMS** - if you want to do this it is better to check that you have correct data and then going back to the beginning of the report and changing the option. The filters you have set will NOT be lost by going back.

You will see a large number of filters that can be set. In brackets after most of the entries there is an askerisk (*). This means that no filter is set and all the data is required.



The first filter to set is the **Product Sale Selection**.

Double click on **Product Sale Selection** and configure the window.



First set the date ranges for the **Sold** and **Not Sold** areas.

Use the filters, bottom left, to find **all** the flea product ranges. This will include any products that have subsequently be removed from your sales list. Add each range of products to the **Sold** and **Not Sold** area.

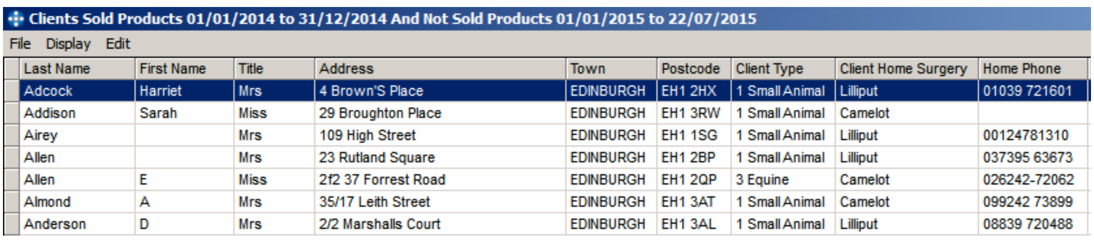
Click on **OK** to save the product selection.

At this point you can set any other filters required. This report does not allow you to select clients with specified debt severity so hopefully you have your bad debt clients as separate client types. If you are going to send text messages make sure you set the filters correctly so that only clients with mobile phone numbers and allowed to have SMS sent are selected.

Note: If selecting more than one entry when selecting filters hold down the **Control** key to select more than one option.

When you have set the filters select **Continue** and then click on **Finish**.

The grid appears with a large number of rows – one for client that meets the criteria. The report can be exported to a csv (best version) or Excel format.


Clients Sold Products 01/01/2014 to 31/12/2014 And Not Sold Products 01/01/2015 to 22/07/2015

File Display Edit

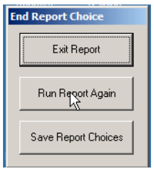
Last Name	First Name	Title	Address	Town	Postcode	Client Type	Client Home Surgery	Home Phone
Adcock	Harriet	Mrs	4 Brown'S Place	EDINBURGH	EH1 2HX	1 Small Animal	Lilliput	01039 721601
Addison	Sarah	Miss	29 Broughton Place	EDINBURGH	EH1 3RW	1 Small Animal	Camelot	
Airey		Mrs	109 High Street	EDINBURGH	EH1 1SG	1 Small Animal	Lilliput	00124781310
Allen		Mrs	23 Rutland Square	EDINBURGH	EH1 2BP	1 Small Animal	Lilliput	037395 63673
Allen	E	Miss	2f2 37 Forrest Road	EDINBURGH	EH1 2QP	3 Equine	Camelot	026242-72062
Almond	A	Mrs	35/17 Leith Street	EDINBURGH	EH1 3AT	1 Small Animal	Camelot	099242 73899
Anderson	D	Mrs	2/2 Marshalls Court	EDINBURGH	EH1 3AL	1 Small Animal	Lilliput	08839 720488

A column can be hidden by right clicking and selecting **Hide**. The column can be unhidden by clicking on **Display** and **Show Column**.

A column can be dragged into a new position.

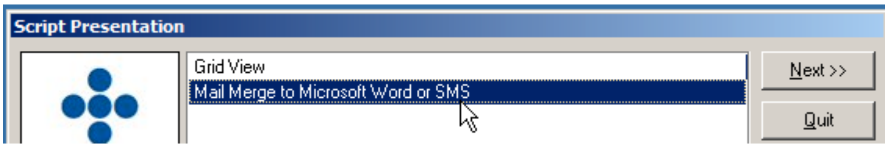
There is more information in using the grid in the **Help** file entitled **How Do I use the grid in RoboVet reports**.

Assuming that the data is correct you may want to write or send a text message to all the clients about how important it is to have flea treatment.

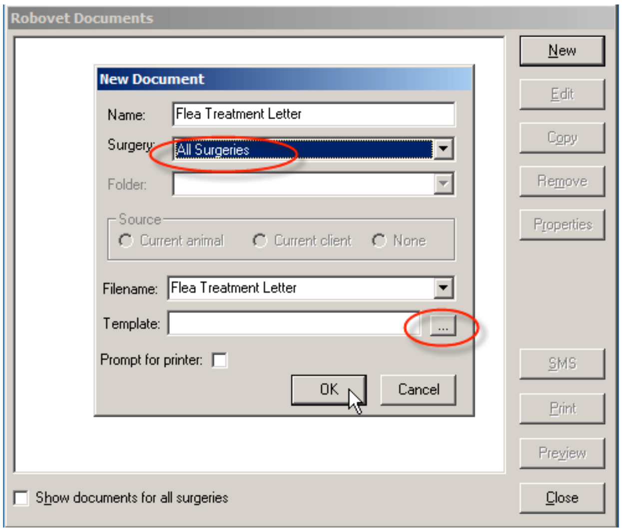


Close the grid (X top right) and select **Run Report Again**.

Click on **Back** and select **Mail Merge to Microsoft Word or SMS** and then on **Next** and then **Finish**.



Click on **New** to create a new Word document which can be set up as a letter or text message.

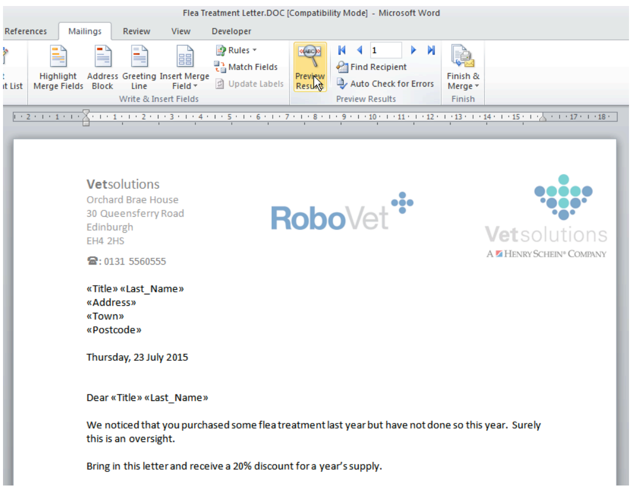


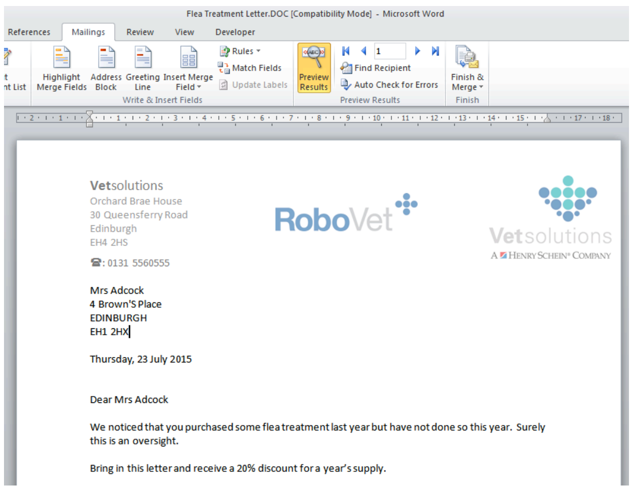
Give the document a name. Select **All Surgeries** if you are going to save the report and may want to run it at other surgeries.

Click on the browse button to the right of the **Template** field if you want to start off with an existing document that is somewhere on your network.

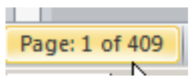
If you have not selected a template a blank Word document appears.

Write you letter using the merge field just in the same way you create new RoboVet documents.





When you have finished close the document and save the changes and then save the **RV Doc**.



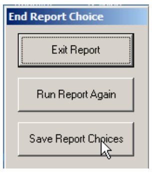
With the new document highlighted click on **Preview** to see all the letters you have created. Using the criteria selected I have created a document containing 409 letters.

This document can be printed or saved if you want to print it later.

Rather than **Preview** you can go directly to print.

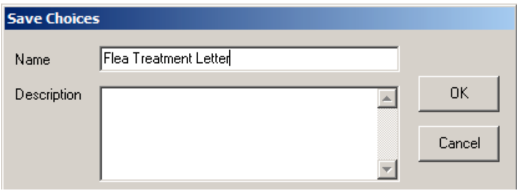
If you has wanted to SMS the clients you use exactly the same method but in **Word** type the text message to send. You can then click on **SMS** to sent the text messages.

Saving the report to use again



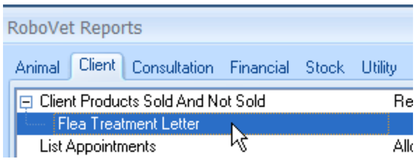
Saving the report will save the filters you have set **except** for the product selection.

Close the report with the X on the top right or go to **File** and **Exit**. Select **Save Report Choices**.



Give the report a name. It is a good practice to put your initials at the beginning of a report as once created everyone with permission to run the report will have access to your report!

After clicking **OK** click and then exiting the report click on one of the other tabs at the top and then back on to the **Client** tab. Click on the + to the left of the **Client Products Sold And Not Sold** report and you will see the new report in the list.



When you run the report again you have to start by setting the **Product Sale Selection**. The other filters will have been saved.

When you get to the end of the report the letter you created will be waiting for you! You can edit the letter before previewing and or printing.