RoboVet Reports

The reports are grouped by type each type being a tab in the **Reports** section. They nearly all work the same way. The initial window gives the options of producing a grid report or mail merging the data to **Microsoft Word**. The next window contains a number of filters that can be set. Once the filters are set there may be another window offering set report options.

After running a report in grid view each report can be formatted in many different ways. The formats can be saved and used again.

When the grid is closed it is possible to save the report choices (the filters) and to produce the report in a chosen format. This means that you can produce a list of useful reports to use over and over again.

The reports can be saved in csv or **Microsoft Excel** format.

			Email Enabled	SMS Enabled	Marketing	Client Animal Statistics	Accounting	Sales Information	Client Animal Management
Animal tab									
	List Animal Reminders	Allows a search for reminders due in a date range. These can be filtered by animal type/reminder type/date ranges. They can be displayed in a grid or merged to a Word Document or used for sending SMS and Email reminders. Major source of income.	✓	✓	✓	✓			
	List Animals	Create customised reports using animal and client a large range of selectable parameters. It includes standard reports on: Insured/non-insured animals/Animal alerts/Statistics/Pet Passports/Moved animals.		✓	✓	✓			
Client tab									
	Client Products Sold And Not Sold	Excellent marketing report. Enables one to get a report on clients who have not been sold products and those have been sold a range of products in one date range and not another. It can also be used simply to report on clients who have not been sold a product. For example: Dental Check-up, Wormers, Vaccination or Flea Products.		✓	✓			✓	
	List Appointments	A report for all appointments in specified diaries or missed appointments or online appointments.			✓	✓			
	List Clients	Create customised reports using client detail. It includes standard reports on: Top Client list based on total spend, Active and Inactive clients, New clients, Bonded clients, those with live animals and Senior client list (number of years registered).		✓	✓	✓			✓
	List Referring Practices	Lists information about practices that have referred to you and are added to the referral list.			✓				
	List Scheme Members	Create lists of clients that are a member of a scheme. Excellent for communicating to scheme members.		✓	✓	✓			✓

Consultation tab									
	List Consultations	An excellent report for looking at sales. It can be used to create 'clients see and not paid' reports and pre-invoicing reports.					✓	✓	✓
	List Current Animal Consultation	This is the animal history report and creates a document about the animal highlighted in the Workwith box. It is possible to save it as a pdf file to email. It can also be generated when in an animal record.						✓	
	List Prescriptions	This will display a list of clients/animals that have had prescriptions (printed to take away).							✓
Financial tab									
	Aged Debt Analysis	This does not produce a report but updates the debt figures for the **Quick Aged Debt** report to include transactions up to the time of running. It is automatically run overnight as part of housekeeping.					✓		
	Day Book	Displays payments taken. Can be filtered by date and branch. Reports from here include the Daybook report, Daybook consultation report, Daybook payments with allocation, and Daybook Booked work. It is usually generated from the print section of the diary.					✓		
	Historical Balance	This displays clients' outstanding debt/credit as at a specified date. There is an option to display a breakdown by age of debt.					✓		✓
	Invoice Run	This is used to set up invoice runs for week/month end. The invoices are then created using the next option - Invoice Run Batch.					✓		
	Invoice Run Batch	This is used to create the invoices using the invoice runs created earlier. The dates default to the previous month but they can be overwritten to allow them to be run daily, weekly or any specified date range.					✓		
	List Consult Sales	This report is based on consultations and does not show product information. It is used to generate a large number of sales reports such as sales by vet and sales by consultation type. There are several useful summary options. It is often used to confirm the sales figures in the **Period End Summary**.					✓	✓	
	List Corrections	Lists corrections in a given date range.					✓		
	List Credit Notes	Lists credit notes in a given date range including those removed.					✓		
	List Invoices	Lists invoices in a given date range including removed.					✓		
	List Payments	Lists payments in a given date range including removed.					✓		
	List Product Sales	One of the most useful reports that shows each sales line in detail. Used to produce a large number of saved reports such as: Monthly Sales to enter into another accounting package, Sales by Category; Sales by product range and sales by employee.					✓	✓	
	List Refunds	Lists refunds in a given date range including removed.					✓		
	List Write Offs	Lists write offs in a given date range including removed.					✓		
	Period End Summary	An excellent summary of all the transactions in a period, normally a month. It starts with the opening balance then adds/subtracts sales and payments to end with the closing balance. It is run automatically overnight after the report has been set up. This is the main report used for obtaining figures to transfer into another accounting package like Sage.					✓		

	Quick Client Aged Debt	This produces an aged debt report as of when the **Aged Debt Analysis** script was last run. This happens as part of the overnight housekeeping but can also be updated manually.					✓		✓
	Scheme Accounts	This report lists payments and fees for schemes.					✓		✓
	Statement Run	This is used to create statements for groups of clients. There are different statement styles to suit different client types, for example separate runs for Large and Small animal. Typically they are produced as part of the month end processing.					✓		
	Surcharge Run	This is a script that is run to add advertised surcharges to accounts that have been unpaid.					✓		
Stock tab									
	List Batch Sales	This displays sales with batch numbers and expiry dates and can be filtered by date and batch number. It is useful for producing reports for farmers.				✓		✓	
	Note: There are many stock reports that are run within the **Product List** window.								
Utility tab									
	Account Health Check	This is a script that runs automatically overnight but can be run manually if there appears to be a problem with a client's account.							✓
	Credit Note Discrepancies	This can be run to identify credit note discrepancies. It is now used rarely since improving credit notes functionality.					✓		
	Merge Animal	This enables animals on a client record to be merged into one record.							✓
	Merge Client	This enables duplicate clients to be merged and then duplicate animals merged.							✓
	Reset VAT Rate Backdate Sales	A useful little tool when the VAT rate is changed. It enables users to back date work entries into an old VAT rate period and then update the VAT for those sales to the old VAT rate.					✓		