

RoboVet 5

What is New in Akita Bronze (FP31)



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Introduction

This document details development work carried out for RoboVet Akita Bronze (Feature Pack 31). If you are upgrading from any version other than RoboVet Akita Azure (Feature Pack 30) you should read about the changes made over the last few versions. The '**What is New**' documents for the previous **Feature Packs** are in the '**What's New Previous Releases**' section of **Help**.

The focus of Akita Bronze (FP31) has been on the ability to generate multiple product reminders when selling a product in RoboVet, and also on the ability to opt out of receiving different types of reminders.

Rapport users who send out reminders for flea and worming treatments based on sales quantity will benefit from this new version of RoboVet. Reminders will now be generated from RoboVet, rather than from the separate spreadsheet that has been required until now.

Until now, it has only been possible to generate a single reminder when selling a product in RoboVet. The primary purpose of these new multiple product reminders is to remind the client to apply a treatment to their pet at home every time it is due, or to come in to the Practice for the next course if they have run out. For example, if a client comes in to the Practice and buys six months of worming tablets, a reminder will be sent to the client each month for the next six months to remind them to give their pet the tablet and to come back to the Practice when they run out.

As multiple product reminders in RoboVet are new, it is necessary to cater for clients who may wish to receive some types of reminders, e.g. to attend an appointment, but may not wish to receive others, e.g. home treatment reminders. Work has been done to enable clients to be opted out of different types of reminders as well as to ensure that clients can continue to receive communications from both Rapport and non-Rapport practices via their preferred method (e.g. post/SMS/email).

Finally, some changes to RoboVet Reports have been made to make it easier for users to understand how certain filters will behave.

This document details how:

- to set up multiple reminders against products in RoboVet and the different ways in which this can be done.
- a user can enter a quantity of reminders at the point of sale, depending on how the product has been set up in the Product List.
- existing reminders are cleared as new reminders are generated.
- clients/animals can be excluded from having different types of reminders generated (home treatment, appointment, practice visit) so that details of these clients/animals are excluded/included in the results of a report in RoboVet as appropriate.
- changes have been made to the client/animal record in RoboVet to improve the visibility around opt outs.

Finally, an important fix applied to the behaviour of the comm engine now gives users greater control when sending SMS and email to clients via RoboVet.

Important Setup Information

- Since FP25, RoboVet has required .Net 4.5. Please note that this is not supported on Windows Server 2003.
- All sites that use VetLogic must have VetLogic 1.2.0.0 installed/reinstalled after being upgraded to RoboVet Akita Bronze (FP31).

- There is no mandatory setup information specific to RoboVet Akita Bronze (FP31). However, it is best practice to update Reminder Types to 'Home Treatment' where appropriate upon upgrading to RoboVet Akita Bronze (FP31). This is in order to ensure that the new client/animal opt out types behave correctly when running reports and working with Rapport (see Reminder Opt Outs section of this document for more information).
- There are no changes to user security in this release.

Multiple Product Reminders

Previously, it was possible to set up a single reminder on a product in RoboVet by selecting a reminder type to generate and to clear (e.g. 'Flea') and entering the number of days that should pass between the product being sold and the reminder being generated.

As practices that upgrade to RoboVet Akita Bronze (FP31) can generate multiple product reminders, they are given a choice of how to do so against each product in RoboVet. This choice is then activated when the product is sold.

Please note that it is possible to check, add, remove and adjust due dates for reminders, within the 'Reminders' screen on animal record should the user deem it necessary to do so.

Creating Reminders against Products in RoboVet

Reminders can now be set up in one of three ways and triggered each time the product is sold:

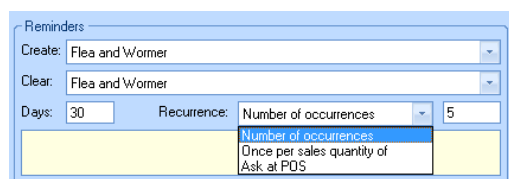
1. **'Number of occurrences'** – this will generate 'X' reminders.
2. **'Once per sales quantity of'** – this will generate one reminder per sales quantity of 'X'.
3. **'Ask at POS'** - requires the user to enter the number of reminders at the point of sale.

In order to create these new multiple reminders, a new 'Recurrence' field and quantity field have been added to the reminders set up in the Product List.

Users will still be required to select the reminder type to be generated and cleared. A number of days must still be specified but now this defines the number of days between each reminder rather than just the number of days between the product being sold and a single reminder being generated.

Number of Occurrences

In this example, the user has chosen to generate a 'Flea and Wormer' reminder every 30 days on a total of 5 occasions, regardless of the quantity of product sold.

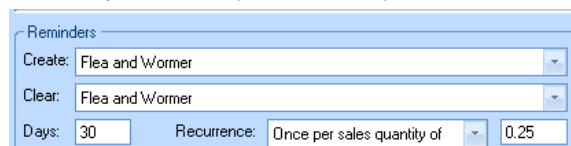


The screenshot shows a 'Reminders' form with the following fields: 'Create:' and 'Clear:' both set to 'Flea and Wormer'; 'Days:' set to 30; and 'Recurrence:' set to 'Number of occurrences' with a quantity of 5. A dropdown menu is open below the recurrence field, showing options: 'Number of occurrences' (selected), 'Once per sales quantity of', and 'Ask at POS'.

Please note that when a Practice upgrades to RoboVet Akita Bronze (FP31), any existing product reminders will be set to 'Number of occurrences' with a quantity of 1, in order to replicate existing behaviour. This will also be the default behaviour for a new product reminder.

Once per sales quantity of

In this example, the user has chosen to generate a 'Flea and Wormer' reminder each time a quantity of 0.25 of the product is sold. If the amount of product sold to a client was '1', then 4 reminders would be generated at 30 day intervals ($1 \div 0.25 = 4$)



The screenshot shows a 'Reminders' form with the following fields: 'Create:' and 'Clear:' both set to 'Flea and Wormer'; 'Days:' set to 30; and 'Recurrence:' set to 'Once per sales quantity of' with a quantity of 0.25.

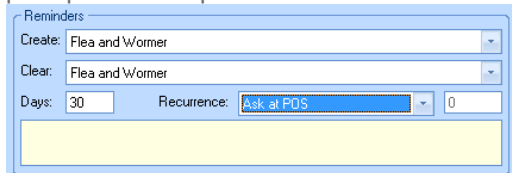
The sales quantity used to calculate the number of reminders to generate is:

- In the case of parent product sale - the sales quantity from the point of sale.
- In the case of NSM sale - the equivalent parent units sales quantity (i.e. point of sale quantity x NSM pack units per sale).

Where the sale quantity results in the number of required reminders not being a whole number, the result is rounded up '.5' or above, otherwise it is rounded down (i.e. 7.4 would round down to 7 reminders, and 7.5 would round up to 8 reminders). Please note that where the quantity of reminders would be 0.4 or less, the number of reminders generated when the product is sold would be zero.

Ask at POS

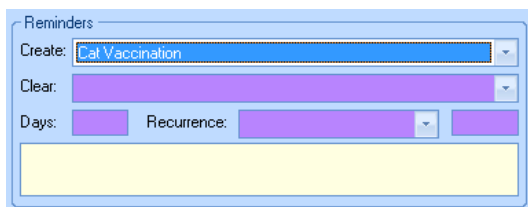
When 'Ask at POS' is selected, the quantity textbox is set to 0 and disabled. In this case, the user will be prompted at the point of sale to enter the number of required reminders.



The screenshot shows a 'Reminders' dialog box with the following fields: 'Create:' set to 'Flea and Wormer', 'Clear:' set to 'Flea and Wormer', 'Days:' set to '30', and 'Recurrence:' set to 'Ask at POS'. The quantity field is set to '0' and is disabled.

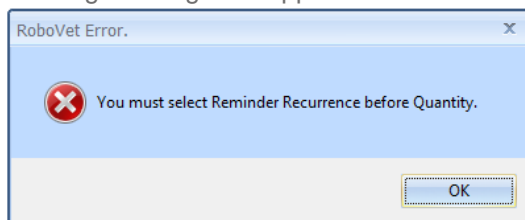
Multiple Item Edit (MIE)

All fields relating to the setup of reminders in the Product List are available in MIE, enabling users to set up or change multiple products in one instance.



The screenshot shows the 'Reminders' dialog box in MIE mode. The 'Create:' field is set to 'Cat Vaccination'. The 'Clear:' field is empty. The 'Days:' and 'Recurrence:' fields are highlighted in purple, indicating they are disabled or not applicable in this mode.

If the user enters a quantity when the products selected for MIE have different recurrence types, then a warning message will appear.



Interim Solution Removal – Rapport Users Only

As users now have the ability to set up multiple reminders within the Product List in RoboVet, the Automatic Product Reminders script will be removed as part of an FP31 upgrade in order to prevent duplicate sets of reminders being created.

The interim solution stored a list of products with a reminder type, quantity and reminder days. This will be used to update the following information in the Product List for a given product:

- Reminder create type
- Reminder clear type
- Reminder quantity
- Reminder days
- Recurrence type will be set to 'Once per sales quantity of'

If a product has an existing reminder generation setup via this script, this will be integrated with the product in the Product List on conversion to RoboVet Akita Bronze (FP31). The upgrade process will also create reminders for any products sold between the last run time of the script and the time of the upgrade.

Selling Products with Multiple Reminders

When a user sells a product, reminders are generated according to how the product has been set up in the Product List. This is also the case when an estimate is converted to a consult. When the Recurrence type is 'Ask at POS', the user is required to enter a quantity of reminders to be generated at the point of sale. This question is presented to the user, for all products (parent and POS), via a new window:

Product	First Date	Days	Reminder Type	Quantity
Drontal Dog	28/08/2017	60	Worming	6

The following reminders have also been generated
 2 x Dog Vaccination
 4 x Advantix Dog <4Kg

Show animal reminders on sale completion

OK

In this example, the user has entered '6' in the Quantity column to generate 6 reminders for this particular sale of 'Drontal Dog'. These reminders will be generated at 60 day intervals.

If other reminders have been created as part of this sale, e.g. from POS products, they are also displayed on this screen (e.g. 2 x Dog Vaccination and 4 x Advantix Dog in the example above).

Upon clicking 'OK' RoboVet will only allow the user to proceed if they have entered a whole number in the 'Quantity' column'. If the user leaves zero as a quantity, this is permitted, but a warning is shown to make sure that they do not want to create any reminders for the sale. A similar warning is shown if the user tries to generate more than 500 reminders.

If the user ticks the box 'Show animal reminders on sale completion' they will see the existing animal reminders screen that can be accessed from the animal record:

Animal Reminders for Pudding

Reminder type: All Reminder Types

Show overdue (or due within 5 days)
 Show cleared
 Show not cleared

Type	Due Date	Cleared	Cleared Information	Last Reminder Sent	Notes
Worming	28/08/2017	No			[RoboVet Auto-Generated] Apply once
Flea Reminder	27/09/2017	No			[RoboVet Auto-Generated] Apply every
Worming	27/10/2017	No			[RoboVet Auto-Generated] Apply once
Worming	26/12/2017	No			[RoboVet Auto-Generated] Apply once
Flea Reminder	26/12/2017	No			[RoboVet Auto-Generated] Apply every
Dog Vaccination	26/12/2017	No			[RoboVet Auto-Generated] Apply twice

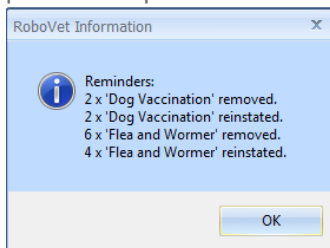
Clear Remove New
Print Close

This allows the user to see all reminders that exist for that animal and make any changes deemed necessary.

Upselling and Changing Sale

When a product that creates reminders has been sold as part of a consultation, and it is then subsequently upsold, any reminders that were created will be removed. Additionally, any reminders that were cleared as a result of this product sale will be reinstated.

The user will be shown the quantity and type of reminders that have been removed or reinstated when a product is upsold.



RoboVet handles changes to a sale by removing or restoring any reminders generated or cleared by the original sale and then starting from scratch for the updated sale.

Clearing Existing Reminders

In addition to generating reminders, a product may have been set up in the Product List to clear reminders of a certain type. If this is the case, then the sale of the product will trigger the clearing of all uncleared reminders of that reminder type for the animal.

For example, an animal may have 3 remaining flea reminders uncleared, and then a further batch of flea treatments are sold for administering at home by the pet's owner. If the new batch requires that 5 reminders are generated, this results in the 3 uncleared reminders being cleared, and 5 new reminders being generated.

Reminder Opt Outs

In this Feature Pack work has been done to ensure that opt out functionality supports the distinction between different types of reminders. The outcome is that clients receive the reminder types they want to receive via the communication method that they prefer. Clients can opt out of communications as follows:

Communication Methods

- reminder communications by SMS, email or post
- marketing communications by SMS, email or post

Reminder Types

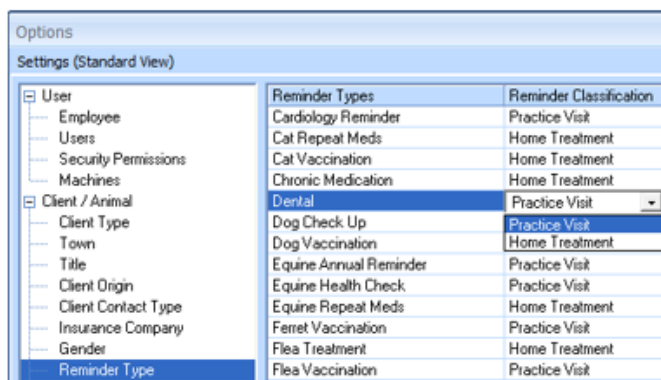
- appointment reminders for all of their animals or selected animals
- home treatment reminders for all of their animals or selected animals
- practice visit reminders for all of their animals or selected animals

These three reminder types replace the generic 'Exclude from reminder generation' option previously available in RoboVet.

It is important for users to note that if a client is opted out of receiving a particular classification of reminder, then all of that clients' animals will also be opted out and this cannot be changed at the animal level.

Categorising Reminders

Reminder Types set up in RoboVet Options can now have a classification of 'Practice Visit' or 'Home Treatment'.



The screenshot shows the 'Options' window with 'Settings (Standard View)'. On the left is a tree view with 'Reminder Type' selected. The main area displays a table with two columns: 'Reminder Types' and 'Reminder Classification'. The table lists various reminder types and their corresponding classifications.

Reminder Types	Reminder Classification
Cardiology Reminder	Practice Visit
Cat Repeat Meds	Home Treatment
Cat Vaccination	Home Treatment
Chronic Medication	Home Treatment
Dental	Practice Visit
Dog Check Up	Practice Visit
Dog Vaccination	Home Treatment
Equine Annual Reminder	Practice Visit
Equine Health Check	Practice Visit
Equine Repeat Meds	Home Treatment
Ferret Vaccination	Practice Visit
Flea Treatment	Home Treatment
Flea Vaccination	Practice Visit

Any existing reminder types will have the classification defaulted to 'Practice Visit'.

It is best practice to update Reminder Types to 'Home Treatment' where appropriate upon upgrading to RoboVet Akita Bronze (FP31). This is in order to ensure that the new client/animal opt out types behave correctly when running reports and working with Rapport.

For example, if an animal is marked as 'Excluded from Home Treatment reminders' in RoboVet then no reminders that are classified as 'Home Treatment' will be sent from RoboVet to Rapport for that client's animals.

RoboVet Client Record Changes

Previously, the client 'change details' screen featured a checkbox 'Exclude from reminder generation'. This is removed with this upgrade and replaced with three separate checkboxes in a section titled 'Communication Preferences' on the 'Exclusions and Notes' tab:

- Exclude from appointment reminders
- Exclude from home treatment reminders
- Exclude from practice visit reminders

In addition, the checkboxes to exclude a client from being sent marketing or reminder communications by SMS, email or post have also been moved to the Exclusions and Notes tab, as has the checkbox to allow invoices or statements by email. This allows the user to set all client communication preferences in one area. Please note that there is no security on these communication preferences.

Mrs Ellie Test

Information Exclusions and Notes Contacts

Exclusions

- Exclude from next invoice run
- Exclude from all invoice runs
- Exclude from next statement run
- Exclude from all statement runs
- Exclude from next aged debt report
- Exclude from all aged debt reports
- Exclude from next period end processing
- Exclude from all period end processing

Client Notes

Notes:

Communication Preferences

- Exclude from appointment reminders
- Exclude from home treatment reminders
- Exclude from practice visit reminders

Exclude from SMS: Marketing Reminders

Exclude from email: Marketing Reminders

Exclude from post: Marketing Reminders

Financial Communications

- Allow invoices / statements by email

OK Cancel

When a client is excluded from marketing or reminders for SMS, email or post, this information will be displayed under the relevant field on the Information tab.

Mrs Ellie Test

Information Exclusions and Notes Contacts

Classification

Client type*: Origin:

Home surgery*: Appointments not allowed

Travel band: Inactive

Name

Title: Contact Details

First name: Home:

Last name*: Mobile*: (No marketing or reminders by SMS)

Company: Work: Ext:

Fax:

Email*: (No marketing or reminders by email)

Address

Address: Alternate Address

Town: Address:

Postcode: Town:

Map ref: Postcode:

(No marketing or reminders by post) Holding no:

Financial

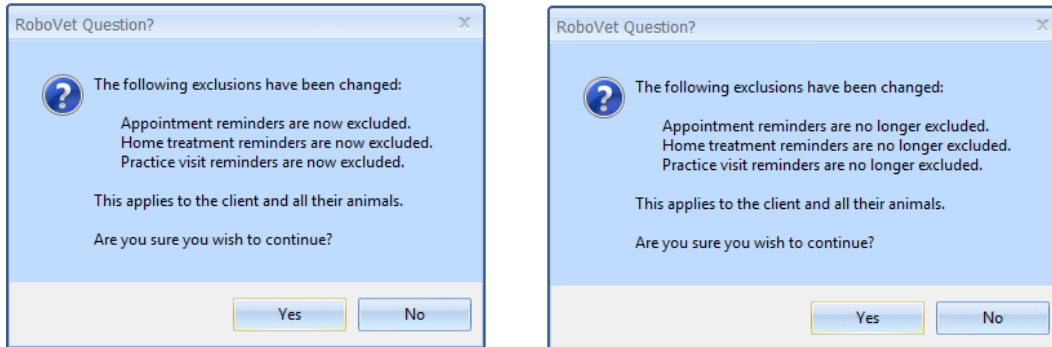
Account terms*: Credit limit:

Debt severity: No VAT

Last statement: Charity

OK Cancel

If a client's reminder preferences are changed, then these preferences are applied to all of the client's animals. When the user selects OK on the client edit screen, they will be warned that changing the client's preferences will also update all animals' preferences and asked if they want to continue. Selecting 'Yes' will save the changes, and selecting 'No' will direct the user back to the client edit screen.



Opt outs for home treatment, practice visit and appointment reminders are displayed on the client record in the 'All' section in place of the previous 'Reminder generation' exclusion:

Info	Notes/Other	Exclusions
Individual		
Next invoice run:		EXCLUDE
All invoice runs:		EXCLUDE
Next statement run:		Include
All statement runs:		Include
Next aged debt report:		Include
All aged debt reports:		Include
All		
Next period end processing:		Include
All period end processing:		EXCLUDE
Appointment reminder:		Include
Home treatment reminder:		EXCLUDE
Practice visit reminder:		Include

RoboVet Animal Record Changes

Previously, the animal 'change details' screen featured a checkbox 'Exclude from reminder generation'. This is removed with this upgrade and replaced with three separate checkboxes in a section titled 'Communication Preferences':

- Exclude from appointment reminders
- Exclude from home treatment reminders
- Exclude from practice visit reminders

Previously, there was no connection between the “exclude from reminder generation” flag on the client and the animal and the use of the “exclude from reminder generation” flag on the animal was not actually clear to RoboVet users. With this upgrade, a connection is made between the exclusions on the client and animal records. If an animal’s client has opted out of receiving any of the reminder communications, then the animal is automatically opted out. The reminder exclusion checkboxes will be ticked and disabled.

If a user creates a new animal for a client that has one or more reminder communication opt outs selected, these opt outs will automatically be applied to the new animal and cannot be de-selected. If the client has not opted out of reminder communication, then the communication preferences can be set at an animal level. Where an animal is moved from one client to another, the moved animal will adopt the exclusion flags of its new owner.

On the animal record card, a new ‘Exclusions’ tab has been added which displays the reminder opt outs:

Info	Other	Exclusions
Communication Preferences		
Appointment reminder:		Include
Home treatment reminder:		Exclude
Practice visit reminder:		Include

Appointment Reminders via RoboVet SMS

RVSMS checks the new ‘exclude from appointment reminder’ flag before sending a reminder SMS for an appointment. If the animal is excluded from receiving appointment reminders, then any appointments for that animal will not generate an SMS reminder.

RoboVet Reports

The List Animal Reminders report has been updated to take the new Practice Visit and Home Treatment reminder exclusions into account, allowing users to ensure that animals who are excluded from receiving these types of reminders do not appear in the report output.

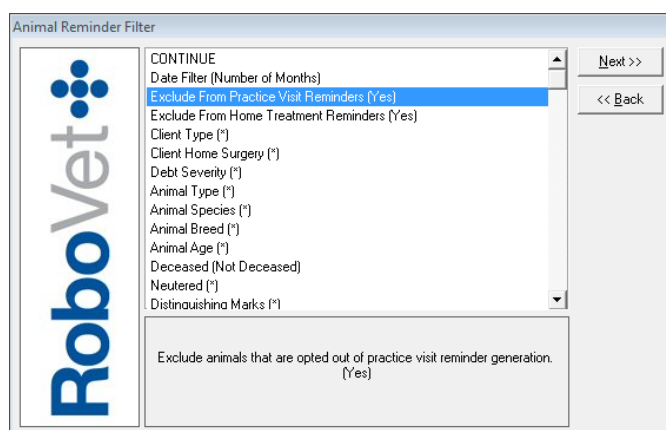
In addition, the List Clients (Filtered Client List) and List Animals reports have been updated to allow users to filter on the three reminder type exclusions: Exclude from Practice Visit Reminders, Exclude from Home Treatment Reminders and Exclude from Appointment Reminders.

Finally, the wording for some of the filters and help text on the List Clients (Filtered and Fixed), List Scheme Members and Client Products Sold and Not Sold reports has been updated to make it easier for users to understand how the filters behave.

List Animal Reminders

The report that is used to generate animal reminders has been modified to take the new Practice Visit and Home Treatment Reminders into account. Two new filter options have been added:

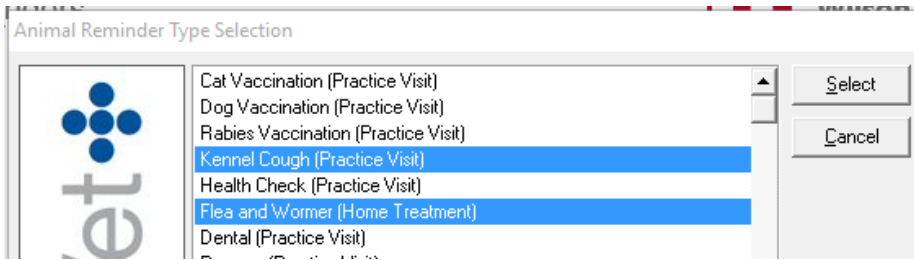
- Exclude from Practice Visit Reminders (defaulted to Yes)
- Exclude from Home Treatment Reminders (defaulted to Yes)



The previous 'Exclude Animals' filter is no longer used. Where an existing report template is used to pre-select filter options, the previous 'Exclude Animals' filter choice is converted to the new 'Practice Visit' and 'Home Treatment' reminder filters as follows:

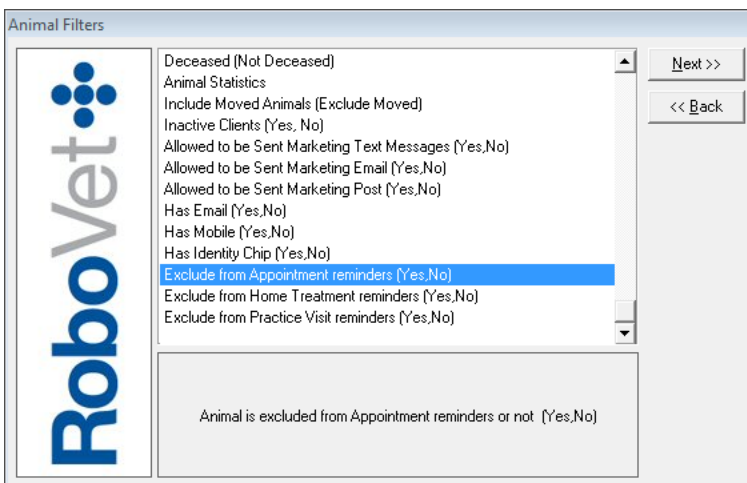
Pre-Akita Bronze (FP31)	Akita Bronze (FP31)
Exclude Animals = Yes	Exclude from Practice Visit Reminders = Yes Exclude from Home Treatment Reminders = Yes
Exclude Animals = No	Exclude from Practice Visit Reminders = No Exclude from Home Treatment Reminders = No

In addition to the new filters, the Reminder Type filter has also been modified so that the user can easily identify whether they are selecting Home Treatment or Practice Visit reminders:



List Animals

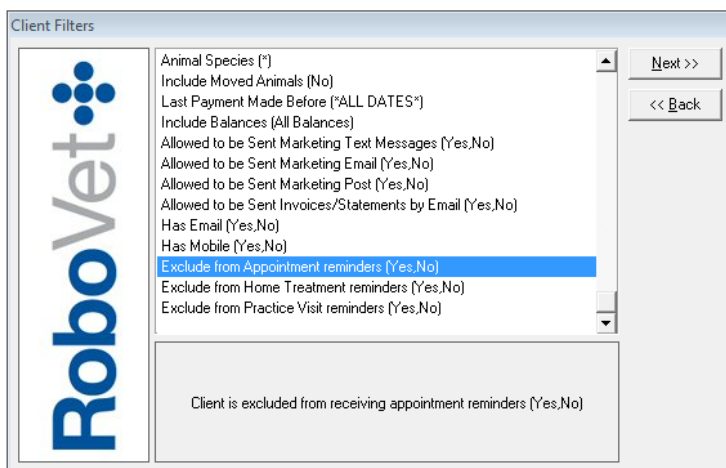
The List Animal report filters now includes options for excluding from appointment, home treatment and practice visit reminders. The default option in each case is 'Yes/No' meaning that all animals are included by default, irrespective of their exclusion settings. Selecting 'Yes' will return only animals that are excluded from receiving that type of reminder, and selecting 'No' will return only animals that are not excluded from receiving the reminder type.



Where the script presentation type is grid view, three new columns display the animals' exclusions. These columns are headed: 'Exclude Appt Reminders', 'Exclude Home Treatment Reminders' and 'Exclude Practice Visit Reminders'.

List Clients

The List Clients - Filtered Client List option now includes filters for excluding from appointment, home treatment and practice visit reminders. The default option is 'Yes/No' meaning that all clients are included by default. Selecting 'Yes' will return only clients that are excluded from receiving that type of reminder, and selecting 'No' will return clients that are not excluded from receiving the reminder type.



Where the script presentation type is grid view, three new columns display the client's exclusions. 'Exclude Appt Reminders', 'Exclude Home Treatment Reminders' and 'Exclude Practice Visit Reminders'. If the report is to include animal information, then the animal's reminder exclusions are also displayed.

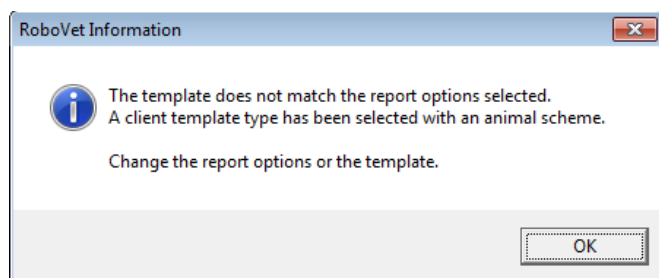
In addition, the help text for filtered and fixed list client reports has been updated to make the behaviour of the filters easier for users to understand. Where appropriate, filter names have also been changed.

The Client Alert filter has been updated to default the Select Clients options to 'With these Alerts' and 'Without these Alerts'. This is the same behaviour as the Client Alerts filter in the Client Product Sold and Not Sold report, and makes it clearer to the user that the filter is not applied by default.

List Scheme Members

The help text for List Scheme Members has been updated to make the behaviour of the filters easier for users to understand. Where appropriate, filter names have also been changed.

When exporting List Scheme Member to Rapport, an error is shown if the Rapport template type does not match the Scheme type selected. This message has been updated to make it clearer to the user what has been selected.



Client Products Sold and Not Sold

The help text for List Scheme Members and List Client Products Sold and Not Sold has been updated to make the behaviour of the filters easier for users to understand. Where appropriate, filter names have also been changed.

Bugs Fixed

Bug - 13099 Comm Engine does not send email or SMS when client is excluded from marketing

When generating an email or SMS from RoboVet, the comm engine would block the communication if 'exclude from marketing' for the relevant communication type was ticked on the client record card. The communication would show as failed with the reason 'Client is excluded from SMS' or 'Client is excluded from email'. This impacted on all of the following:

- SMS from the 'Work With'
- SMS or Email from 'List Animal Reminders' report
- SMS from 'List Animals' report
- SMS from 'Client Products Sold/Not Sold' report
- SMS from 'List Clients' report (filtered client list)
- SMS from 'List Scheme Members' report
- Emailing from invoice/statement run
- RVSMS (automatic appointment reminders)

The cause of this issue is that, prior to separating exclusions into marketing and reminder types, the marketing flags were the original exclusion flags. The comm engine was only checking these original exclusion flags.

Solution

The comm engine now does not check any exclusion flags before sending communications. This allows the user to decide which communications they wish to send.

It is critical that the user should ensure they are applying the appropriate filter for the type of communication as the comm engine will now send anything it is asked to send.