

How do i...



Find the clients who do everything we say! (Or Who are my active/bonded clients)

Your analysis codes are 'grouped' for billing purposes, **Data Major** can use these groupings to report on animals that may or may not have had some treatment. This option will list those animals.

The report we are going to run will include the animal name, number, date of Birth, Species, if it has been chipped, has insurance, surgery registered at, has been neutered.

This option will ONLY look at the last 12 months data.

This option CAN report on those animals that have had, for example, a consultation but NOT had Flea control or Wormers. For the purposes of this exercise we are looking for those clients who have had Vaccines, Wormers, Flea treatments, neutering and microchips. These clients are your best clients! We want to find them and mark them.

Once you have identified the 'top' clients you can go back and find the next group of clients who have had neutering and vaccinations done but don't buy their wormers from you for instance. And so on until you have a good idea of who is buying what from you and who to approach about what! There could be a whole bunch of people who just need an incentive to come into the practice for something they currently buy elsewhere!

From the main menu: **Reports > Data Major > Ad Hoc Queries > Animals by Ana group usage**

The screen should display:

Group	Call It	What
1		
2		
3		
4		
5		
3	Consultations	6 Drugs
6		9 Vaccinations
10	Microchip	12 Hospitalisation
15		15 Laboratory tests / E
18	X-rays	21 Neutering
24		24 Dental work
26	Anaesthesia	27 Operative surgery
30		30 Fluid therapy
33	Antiparasitics	36 Dressing/bandage cha
39		39 Foods
45	Visits	48 Euthanasia/cremation
51		51 Retail products
54	Miscellaneous proced	57 Surcharge/admin. fee
60		60 Discount

The top part of the screen allows you to enter the groups to look for and the lower part shows your existing groups based on your analysis codes.(The GROUP is whatever you have set up in Itemised Billing and can consist of more than one analysis code)

The system works by looking at the clinical records and checks if the group has occurred or not e.g. Yes or No. You can use this option to restrict the report to animals that have had a consultation AND ID chips AND Worming etc.

The options (under 'What') are:

Yes The group **has** appeared for that animal

No The animal **did not have** any work in that group

Ignore Ignore the settings and include the animal but show the status for the group (yes or no)



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(The field 'Call it' is what to call the column).

Your screen will look something like this

Group	Call It	What
1 9	Vax	Yes No Ignore
2 10	ID	Yes No Ignore
3 33	Flea /Worm	Yes No Ignore
4		
5		

3 Consultations	4 Consult Procedures	6 Drugs
9 Vaccinations	10 Microchip	12 Hospitalisation
15 Laboratory tests / E	18 Diagnostics	21 Neutering
24 Dental work	26 Anaesthesia	27 Operative surgery
30 Fluid therapy	33 Antiparasitics	36 Dressing/bandage cha
39 Foods	45 Visits	48 Euthanasia/cremation
51 Retail products	54 Miscellaneous proced	57 Surcharge/admin. fee
60 Discount		

Limit to just Canine & Feline Yes No

Now, answer the questions about who to include, spend and marking the cards. If you want to mark the records that are found, you will be asked to select a category to mark them as.

Your result screen will look something like this.

Number	Animal Name	Species	ID Chip	Neutered	Dead	Insured
57	Becky	Feline	Yes	Yes	Alive	Yes
601	Toby	Canine	Yes	No	Alive	Yes

The columns have been labelled with the text you entered on the setup screen. As in this example we selected Yes as the choice. So, only animals that have had all 3 of our groups in the last year will be found.

Vaccine	ID	Flea /Worm	Spend	Visits
Yes	Yes	Yes	9.10	1
Yes	Yes	Yes	25.88	1

Once you are happy with the options save the query and then re-run to file. This can be loaded into a spreadsheet to look for trends within your client base. You can also create similar reports using different criteria.