

RX WORKS

HOW TO TARGET THE PROFENDER MARKET

Species: CAT

Made a sale in the last 12 Months.

Minimum Spend: \$100.

Not an Advocate user.

Clipboard
Task Panel
System Controller
Abbott, Doug & Dianne
(no patient)

ications

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Rx Task Panel

River House Veterinary Clinic
Monday, 25 June 2007

Activities & Resources

- Activities & Resources
- Scripting & Batch Reports
- Tools and Utilities
- Excel Data Wizards

Resources

View | Print | Edit | Email | Open | Explore

Document Name	Last Modified	Size (K)
RxWorks Performance Pack Fee Builder 4 Demo	12/04/07	20289

Start Performance Pack

Task Panel

Click on reports

Tools Window Help

New First Prev Next Last List Find Add Edit Delete Print Reports Counter Stock Fees Apps Help

1 **Clipboards**

2 **Task Panel**
System Controller

3 **Abbott, Doug & Dianne**
(no patient)

Reports & Documents

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Reports

A Till Reconciliation & Banking Lists

B Accounts, Debtors & Tax Analysis

C Price Lists & Inventory Control

D Reminder Notices & Statistics

E Financial & Statistical Analysis

F Mail Merge, Labels & Target Marketing

G Query & Export Data

H Setup & Document Editing

Select Listing
Client Details

Selection Criteria
 Client Patient Consult Financial
30 days
equal Add

Restrictions			

Include deactivated items **0 results found.** Execute

Output
client list - account details Print Preview Setup
Export to Excel

Make sure screen is on reports & Documents

1 **Clipboards**

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(no patient)

4 **Reports & Documents**

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- E **Financial & Statistical Analysis**
- F **Mail Merge, Labels & Target Marketing**
- G Query & Export Data**
- H **Setup & Document Editing**

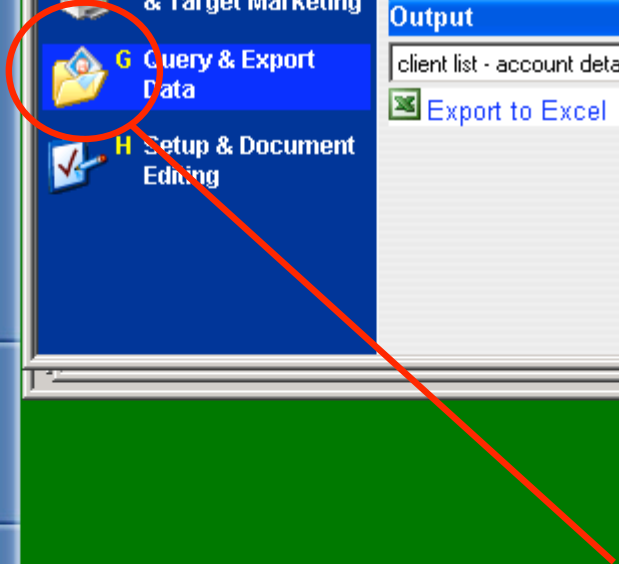
Select Listing
Client Details

Selection Criteria
 Client Patient Consult Financial
30 days
equal Add

Restrictions			

Include deactivated items **0 results found.** Execute

Output
client list - account details Print Preview Setup
Export to Excel



**Click on
Query and
Data Exports**

Tools Window Help

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Select Listing
Client Details

Selection Criteria
 Client Patient Consult Financial

Acute Gastrointestinal
Patient Added Today
Patient Added Yesterday
Pre Anaesthetic Check
Referral Client No
Referral Patient No
Registered Name
Registration No
Renal Disease Check
Sex
Shoeing
Sire
Species
Therapeutic Diet
Training Status
Vaccination 4 Life
Vaccines
Vaccines-BVD
Vaccines-Eastern & Western Encephalitis

Add

X X
F F

() AND OR

Execute

Preview Setup

Click on Patient

Scroll down and click on Species

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Species

equal

Restrictions

Include deactivated items

Output

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Select Listing
Client Details

Selection Criteria
 Client Patient Consult Financial

Species
equal Cat

Restrictions

Restrictions			
Species equal Cat			

Include deactivated items **0 results found.** **Execute**

Output
client list - account details **Print** **Preview** **Setup**

Export to Excel



Click on Add

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Last Sale is in the Last 1 year (from today)

Last Sale is in the Last 1 year (from today)

Last Sale is in the Last 2 years (from today)

Last Sale is in the Last 3 years (from today)

Last Sale is in This Financial Year

Last Sale is Last Calendar Month

Last Sale is Last Calendar Year

Last Sale is more than 12 months ago

Last Sale is more than 24 months ago

Last Sale is more than 36 months ago

Last Sale is more than 6 months ago

Last Sale is This Calendar month

Last Sale Today

Last Sale Yesterday

Maiden Name

Modified Date

Modified User

Newsletter

No of Miles

Add

Execute

Preview Setup

Add

Last sale in the last 12 Months

Click on Client

Clipboards

Task Panel
System Controller

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(no patient)

Reports & Documents

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Amount

Amount
Bank Number
Client Number
Date Entered on Computer
Date of Transaction
Modified Date
Modified User
Referral Transaction
Text
Transaction Clinic
Transaction is >= 1 Jan Last year
Transaction is >= 1 Jan This year
Transaction is >= 1 Jan Two years ago
Transaction is in Last 2 Calendar months
Transaction is in Last 3 months (from today)
Transaction is in Last 30 Days
Transaction is in Last 6 months (from today)
Transaction is in Last 7 Days

Add

X X
AND OR

Execute

Preview Setup

Financial

Amount

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Amount

greater than \$100

equal
not equal
greater than
greater than or equal to
less than
less than or equal to
empty

Include deactivated items

0 results found. **Execute**

Output

client list - account details

Print **Preview** **Setup**

Export to Excel

Add

\$100

Greater than

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Consult Item
not equal Advocate Purple Large Add

Restrictions		
Species equal Cat	AND	
Last Sale is in the Last 1 year (from t...	AND	
Amount greater than \$200	AND	
Consult Item not equal 606997	AND	

Include deactivated items **13 results found.** Execute

Output

client list - address details Print Preview Setup

Export to Excel

Execute

1 Clipboards

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Select Listing

Client Details

Selection Criteria

Client Patient Consult Financial

Consult Item: not equal Advocate Orange Cat/Ki Add

Restrictions		
Amount greater than \$200	AND	
Consult Item not equal 607000	AND	
Consult Item not equal 606999	AND	
Consult Item not equal 606997		

Include deactivated items **0 results found.** Execute

Output

client list - address details Print Preview Setup

- client list - account details
- client list - address details**
- client list - categories
- client list - email
- client list - other date details
- client list - other number details
- client list - other text details

Address details

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Selection Criteria

Client Patient Consult Financial

Consult Item: not equal Advocate Purple Large

Restrictions		
Species equal Cat	AND	
Last Sale is in the Last 1 year (from t...	AND	
Amount greater than \$200	AND	
Consult Item not equal 606997	AND	

Include deactivated items **13 results found.**

Output

client list - address details

[Export to Excel](#)

Export to Excel