Marketing

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Summary

This page documents reports from the Marketing category.

Details

Within the Standard report tab, you will find the following Marketing reports as shown below:

Marketing

Report	Description / Function
Active Clients	Lists all Clients who have had either a treatment or made a payment between specified dates based on Invoice/Payment Date. **Includes:** If item credited/refunded. **Excludes:** Deleted items.
Active Patients	Lists all Patients who have had a treatment based on the chosen filters. It Lists all Patients who have had a treatment. Date Criteria: Item Date. **Includes**: Credits and Refunds. **Excludes:** Deleted Items
Active Patients/Clients by Region - Summary	Lists all Patients who have not had a treatment or made a payment between the dates specified, grouped by region. Date: Item Date.

Average Surgeon Turnover	Shows each Surgeons average treatment turnover between dates specified. Date: Item Date. Calculation used: Sum (Items Value) / no. treatment items. **Excludes:** Discounts applied in accounts screen, Credits applied in accounts Screen.
Clients with Insurance	Lists all Insurance Policies registered to Patients within the dates specified by Client. Date: Policy Start Date
Clients Registered - by Introduced by	Shows the number of new clients registered sorted by how they were Introduced to the practice (introduced by field in reception).
Clients with Discount Category	Shows Clients and their assigned discount category (Reception > additional info tab).with
Patients with Discount Category	Shows Patients and their assigned discount category (Patient Details screen).
Introduced By	Lists the no. of Clients registered between the dates specified by Introduced By. Details the total spend for each Client and for each Introduced by type. Date: Policy Start Date
Inactive Clients	Lists all Clients who have not had a treatment or made a payment between specified. Date Criteria: Invoice/Payment Date.
Inactive Patients	Lists all patients who have not had a treatment between specified date. Date Criteria: Item Date.

Patients Sold	Lists all patients marked as sold in the patient details screen. Date Criteria: Date flagged as sold (in the patient details screen).
Patients Count with Insurance – Breakdown by Company	Counts how many Patients are associated with each Insurance company.
Top Spending Clients By Payments	Lists the top X spending Clients by payments (with Payment Total for each Client). Date: Payment Date
Treatment Sold - by Treatment Type	Counts the quantity of treatments sold by Treatment Type for Canine Feline and Rabbit species. Date: Item Date.
Clients Visits Per Month	Counts the quantity of treatments sold by Treatment Type for Canine Feline and Rabbit species. Date: Item Date.