BUSINESS ACTIVITY MONITOR

CONTENTS

DASHBOARD

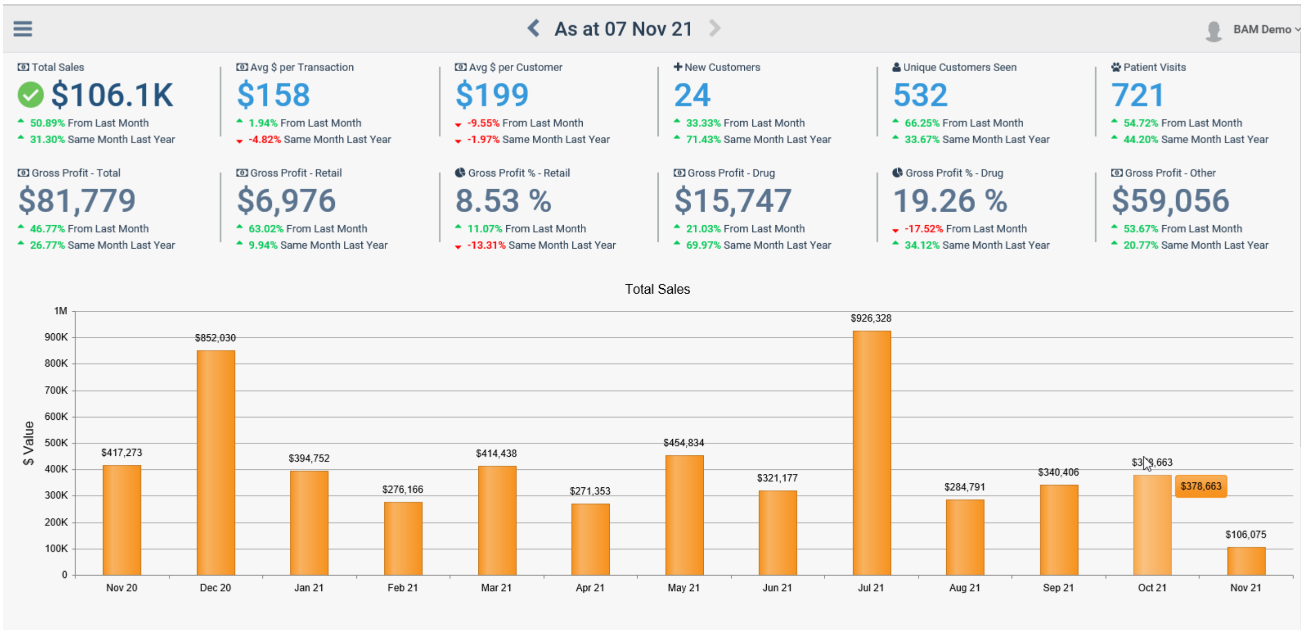
The first screen to appear when opening BAM is the Dashboard. Here you can view a summary of a number of different areas of your business within VetlinkPRO separated into three sections, and the information presented in these sections is controlled via the ‘As at (DATE)’ field along the top. Selecting the left and right arrows that sit either side of the date allow you to move back and forth between the end of each ‘End of Month’ performed in VetlinkPRO up to the current date. Each new date selected will preview the data for that month in the three sections beneath it.

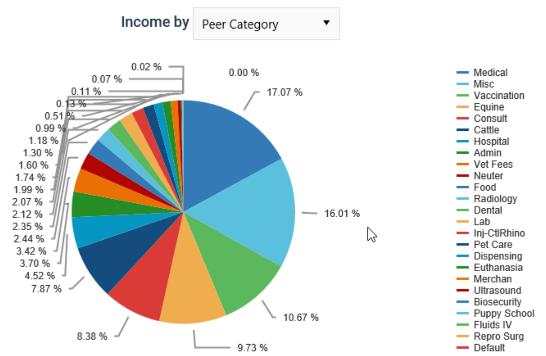
The first section under the date selection is explained below:

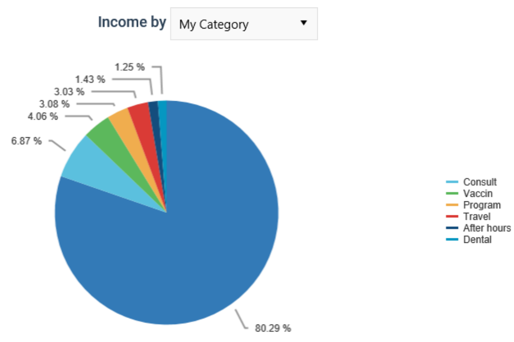
Total Sales	The dollar figure amount of total sales before deducting business costs.
Avg $ per Transaction	The calculated average of dollars spent per transaction from all invoices within the month.
Avg $ per Customer	The calculated average of dollars spent per customer from all invoices within the month.
New Customers	The total number of new customers that had a service product on the bill.
Unique Customers Seen	The total number of unique customers (no duplicates) seen within the month.
Patient Visits	The total number of unique patients (no duplicates) seen within the month.
Gross Profit – Total	The dollar figure amount of total gross profit (after expenses).
Gross Profit – Retail	The dollar figure amount of total gross profit (after expenses) from retail products.
Gross Profit % - Retail	The percentage figure of gross profit (after expenses) from retail products.
Gross Profit – Drug	The dollar figure amount of total gross profit (after expenses) from drug products.
Gross Profit % - Drug	The percentage figure of total gross profit (after expenses) from drug products.
Gross Profit - Other	The dollar figure amount of total gross profit (after expenses) from products other than drug and retail.

The middle section is a bar graph that will display information from the last year based on the selected month at the top of the page. Clicking on the top row of various figures from the first section above the chart will cause that data to be presented in the bar graph e.g. selecting the number of new customers inside the ‘New Customers’ box will show each month’s total of new customers.

The bottom section has two pie charts allowing for comparisons by income of different product categories. By default, the left chart is set to ‘Peer Category’ which is a new filter introduced with BAM that allows for a custom list of categories you wish to track, setting products to these categories is controlled from the product record inside VetlinkPRO. The right pie chart is by default set to ‘My Category’ which is a BAM website-specific custom list of product categories, controlled and viewed only through the website.





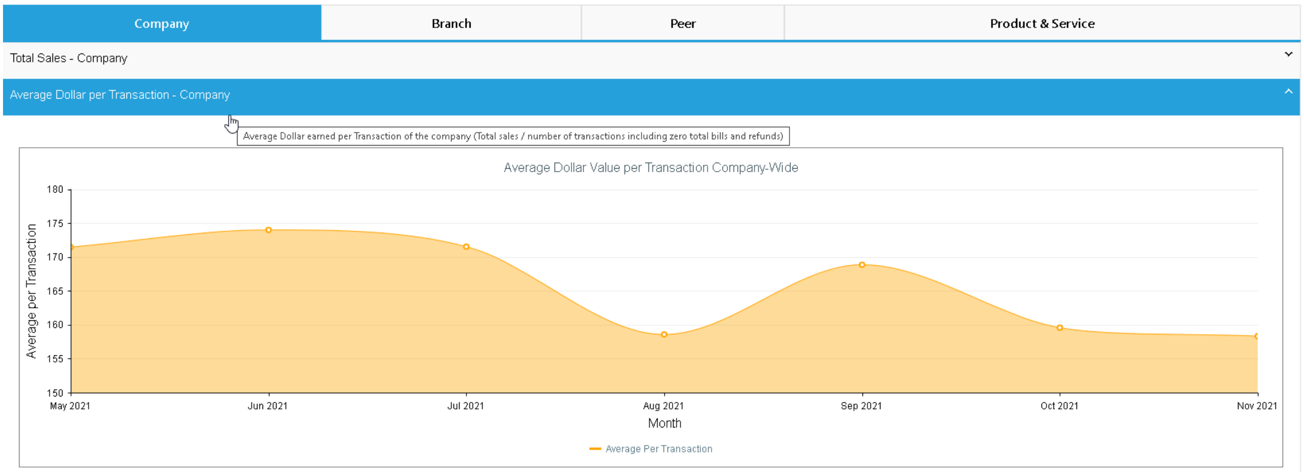


FINANCIAL

The ‘Financial’ page is split into financial data based on ‘Company’, ‘Branch’, ‘Peer’ and ‘Product & Service’. The data displayed in each tab is based on the dates chosen at the top of the page. All data inside these tabs can be exported to PDF, Word document, Excel spreadsheet or printed out.

COMPANY

Total Sales	Contains a bar graph and list of total sales for previous months.
Average Dollar per Transaction	Contains a wave graph and list of the average dollar spent per transaction.
Number of Transactions including zero total bills and refunds	Contains a bar graph and list of the number of transactions made, including bills with a zero total and refunds.
Number of Transactions excluding zero total bills and refunds	Contains a bar graph and list of the number of transactions made, excluding refunds and bills with a zero total.
Sales from Inventory Items	Contains a wave graph and list of the dollar figure of sales made from inventory items (products with stock).
Sales from Non-Inventory Items	Contains a wave graph and list of the dollar figure of sales from non-inventory items (products without stock).
Gross Profit	Contains a bar graph and list of gross profit made organized by total, retail, drug and other.



BRANCH

A branch-based view of financial data. If your clinic has multiple branches, you can select each of them here and view data based on the following:

Total Sales	Contains a bar graph and list of total sales.
Average Dollar per Transaction	Contains a bar graph and list of the average dollar spent per transaction.
Number of Transactions excluding zero total bills and refunds	Contains a bar graph and list of the number of transactions made, excluding bills with a zero total and refunds.
Sales from Inventory Items	Contains a line graph and list of the dollar figure of sales made from inventory items (products with stock).
Sales from Non-Inventory Items	Contains a live graph and list of the dollar figure of sales from non-inventory items (products without stock).

PEER

This tab is still under development but once available, will allow you to compare the statistics of the average dollar spent per transaction at your selected branch with other VetlinkPRO customers across your country. All competing clinic information is hidden, only sales figures are shown. Filters here allow you to choose the ‘Branch’ you want to compare, what ‘Branch Type’ to compare it against (small animal, large animal, mixed, equine), and which ‘State’ you want to compare against (options change depending on country of origin e.g. North and South Island for New Zealand clients.)

Average Dollar per Transaction	Contains a line graph and list graph of the average dollar spent per transaction.

PRODUCT & SERVICE

Two drop-down menus providing income information on Non-Inventory Item categories (products that DO NOT fall under the Retail, Drug and Material class types) and Inventory Item categories (products that DO fall under the Retail, Drug and Material class types)

Income by Non-Inventory Items	Contains a bar graph and list of the total dollar figure of each non-inventory item category sold.
Income by Inventory Items	Contains a bar graph and list of the total dollar figure of each inventory item category sold.
Income by Categories	Contains a bar graph and list of the total dollar figure of each inventory AND non inventory item category sold.

CUSTOMER

The 'Customer' page is split into information and financial data based on 'Company', 'Branch' and 'Peer'. The data displayed in each tab is based on the dates chosen at the top of the page. All data inside these tabs can be exported to PDF, Word document, Excel spreadsheet or printed out.

COMPANY

Number of Unique Customers Seen	Contains a bar graph and list graph of the number of unique customers seen (no duplicates).
Number of Animals Seen	Contains a line graph and list graph of the number of unique animals seen (no duplicates).
Average Dollar per Customer	Contains a wave graph and list graph of the average dollar spent per customer.
Number of New Customers	Contains a bar graph and list graph of the number of new customers seen that had a service product in the bill.
Number of Small Animals	Contains a line graph and list graph of the number of unique small animals seen (no duplicates).
Number of Large Animals	Contains a line graph and list graph of the number of unique large animals seen (no duplicates).

BRANCH

Same as the 'Company' tab but with the option to select which branch you would like to view the stats for.

PEER

As mentioned above, this tab is still under development but once available, will allow you to compare the statistics of the average dollar spent per customer at your selected branch with other VetlinkPRO customers across your country. All competing clinic information is hidden, only sales figures are shown. Filters here allow you to choose the 'Branch' you want to compare, what 'Branch Type' to compare it against (small animal, large animal, mixed, equine), and which 'State' you want to compare against (options change depending on country of origin e.g. North and South Island for New Zealand clients).

Average Dollar per Customer	Contains a wave graph and list graph of the average dollar spent per customer.

EMPLOYEE

The ‘Employee’ page is split into information and financial data for each employee set up in the BAM configuration. The ‘Company’ tab covers all employees, and the ‘Individual’ tab allows you to select a particular employee to view. The data displayed in each tab is based on the dates chosen at the top of the page. All data inside these tabs can be exported to PDF, Word document, Excel spreadsheet or printed out.

COMPANY

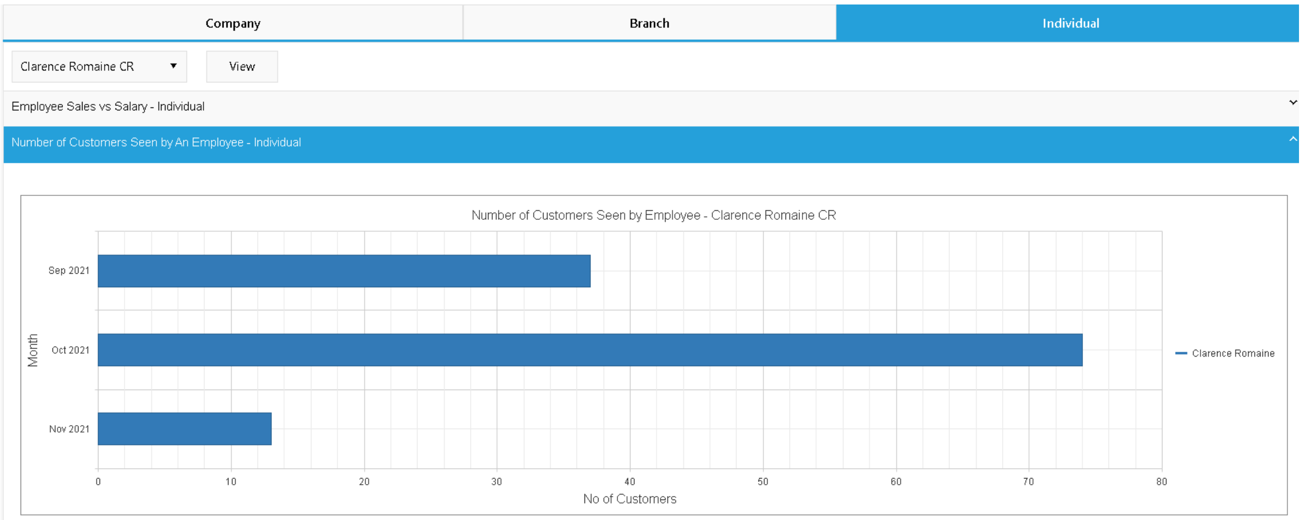
Employee Sales vs Salary - Company	Contains a bar graph and list graph of each employee’s sales total compared to their current salary.
Number of Customers Seen by Employee – Company	Contains a bar graph and list graph of the number of unique customers seen by each employee (no duplicates).
Number of Patients Seen by Employee – Company	Contains a bar graph and list graph of the number of unique patients (animals) seen by each employee (no duplicates).
Average Customers Seen by Employee – Company	Contains a line graph and list graph of the average number of customers seen by each employee.
Average Patients Seen by Employee – Company	Contains a line graph and list graph of the average number of patients seen by each employee.
Income by Employee - Company	Contains a bar graph and list graph of the total income from sales from each employee.

Branch

Income by Employee - Branch	Contains a bar graph and list of a select employee’s sales total.
Number of Customers Seen by An Employee – Branch	Contains a bar graph and list of the number of unique customers seen by a select employee (no duplicates).
Number of Patients Seen by An Employee – Branch	Contains a bar graph and list of the number of unique patients (animals) seen by a select employee (no duplicates).

INDIVIDUAL

Employee Sales vs Salary - Individual	Contains a bar graph and list graph of a select employee's sales total compared to their current salary.
Number of Customers Seen by An Employee – Individual	Contains a bar graph and list graph of the number of unique customers seen by a select employee (no duplicates).
Number of Animals Seen by An Employee – Individual	Contains a bar graph and list graph of the number of unique patients (animals) seen by a select employee (no duplicates).
Income by Employee – Individual	Contains a line graph and list graph of the total income from sales from a select employee.
Income by Employee from Each Animal Type - Individual	Contains a bar graph and list graph of the total income from sales from each employee, ordered by animal type.



MISSED CHARGES

This page is dedicated to running pre-set queries to determine any missed charges from products not sold alongside other products that have been sold within the date range chosen at the top of the page.

First you need to create a query:

1. Select the ‘Click to edit query’ option.
2. Add a ‘Query Name’.
3. Write out a ‘Description’ (optional).
4. Choose the branch you would like to run the query inside.
5. Select the first product to search against (WARNING! Loading this and the second product list may take a while as it opens a drop-down menu of ALL products in your database).
6. Select the second product that you would like to check the missed charges against.
7. Type the number for the ‘Number of unit missed’ field (the amount of stock you would like to have sold).
8. Either ‘Save & View’ or ‘View’ the query without saving.

Once you have saved the query you can view it later. You can also have multiple queries saved for regular report running.

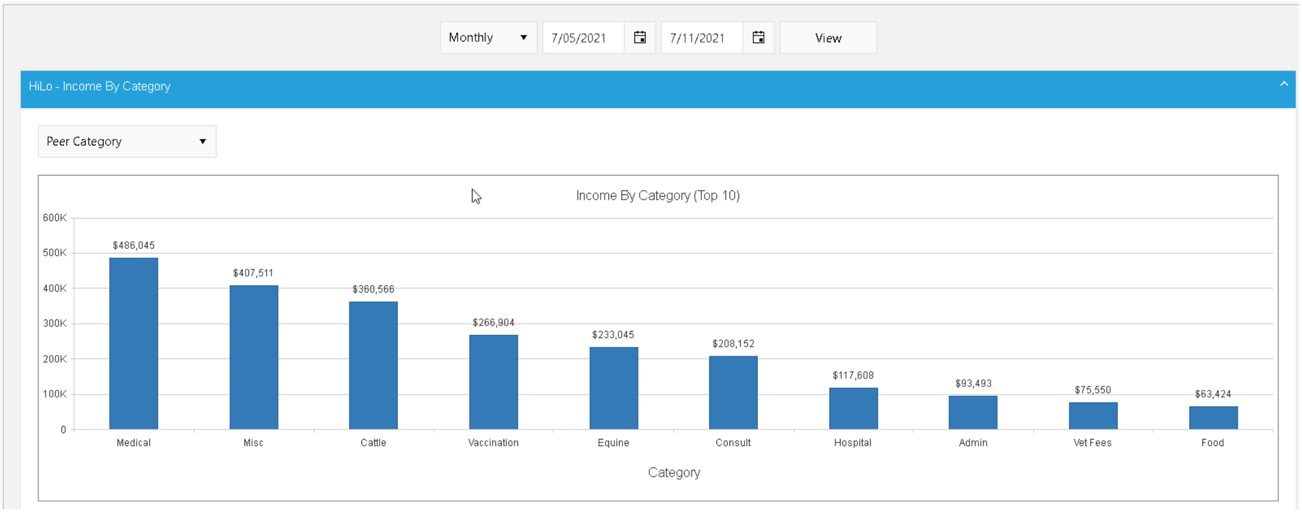
FORENSICS

The 'Forensics' page provides information on additional areas of the business within a certain date range: discounts given, contacts with missing details and patients without future reminders.

Discounts – Company	Contains a bar graph and list graph of the total amount of discounts given company wide.
Missing Contact Details	Contains a bar graph and list graph of the number of customers missing info, how many are missing emails, phones, work phones and mobiles.
Patients without future reminders	Contains a pie graph and list graph of the number of patients without compared to patients with future reminders.

HI-LO

This page allows you to select either the 'Peer Category', PMS Category or My Categories (categories created on BAM) and view, from highest to lowest, the total income earned of each product category within the 'Peer Category' selected, in bar graph and list graph format, within a chosen date range.



STATS

On this page you will find tables of statistics on most of the information listed above, organised by current period, previous period and previous year. In order, the tables are as follows:

- Sales: Total, Non-Inventory, Inventory.
- Income by Species (Top 10).
- Average $ per: Transaction, Customer.
- Customer: New, Active, Retained, Unique seen, Total seen.
- Patient: New, Unique visits, Total visits.
- Transaction: Number of Service, Number of Inventory Item.
- Missing (client info): Total, Email, Home Phone, Work Phone, Mobile.

Nov 2021 Nov 2021 View

Sales	Current Period 01 Nov 2021 - 30 Nov 2021	Previous Period 01 Oct 2021 - 31 Oct 2021	Previous Year 01 Nov 2020 - 30 Nov 2020
Total Sales	$210K	$379K	$417K
Non-Inventory Items	$110K	$216K	$234K
Inventory Items	$99,307	$162K	$183K

Income by Species (Top 10)	Current Period 01 Nov 2021 - 30 Nov 2021	Previous Period 01 Oct 2021 - 31 Oct 2021	Previous Year 01 Nov 2020 - 30 Nov 2020
Dog	$117K	$212K	$221K
Horse	$25,871	$45,352	$55,040
Cattle Beef .	$24,528	$45,628	$50,544
Cattle Feedlot	$14,333	$16,966	$23,698
Cat	$14,312	$32,662	$36,026
Cattle Dairy	$11,040	$21,745	$23,579
Goat	$738	$204	$2,574
Sheep	$361	$1,228	$1,161
Guinea Pig	$301	$407	$627
Bird	$197	$427	$608

Average	Current Period 01 Nov 2021 - 30 Nov 2021	Previous Period 01 Oct 2021 - 31 Oct 2021	Previous Year 01 Nov 2020 - 30 Nov 2020
Avg $ per Transaction	$172	$160	$170
Avg $ per Customer	$245	$256	$266

USER MANAGEMENT

USERS

From the drop-down menu, you can select a current user or create a new user. Creating a new user allows you to create a login and link the user to a staff member so they can log into BAM. The following section, User KPI's allows you to choose what areas they can access.

USER KPIs

Select a user from the top drop-down list and then below you are able to configure which areas of BAM they have access to. This page also supports filtering by KPI type: Financial, Customer, Employee, Patient, Hi-Lo and Inventory.

STAFF SUBSCRIPTION SETUP

The left-side 'Staff' box will show all staff uploaded to your BAM database. The right-side 'Included in plan' box shows the current staff can be reported on. The amount of staff available to appear in the right box is dependent on your BAM subscription.

STAFF SALARY SETUP

Here you can configure staff salaries for financial reporting in BAM. You must select a staff member first, and you will need to configure each staff member if you wish to have accurate reporting for all staff members. The 'Role' menu options (Owner, Reception, Vet, Nurse) are pre-set but may be open to change, please call our helpdesk if you have a suggestion. This page is intended to be set up at the beginning of each year as the 'Target' field is the staff member's sales target and the 'Leave' field is the staff's expected annual leave use.

For quick setup you can set the salary and the target, then click build table and the salary and target will be allocated equally to each month.

STAFF PERFORMANCE SETUP

The staff performance setup uses the data set from the staff salary setup and then compares against other staff on a month-by-month basis. You can then adjust any of the figures for the month as staff take leave or work different hours. The data is then used in the Employee section to compare sales against salary.

SETTINGS

Your Details

From here you can edit your name, email address and phone number.

Change Password

From you can change the password to log into BAM.

My Category

The My Category section is where you can add categories independent of VetlinkPRO to use solely in BAM.

User Defaults

From here you can set some of the period used for calculations such as:

- Period to use to calculate active customers.
- Period to use to calculate retained customers.
- Whether to take bonus points out of sales.
- What the standard working week hours are.

Email Subscription

From here you can set whether you wish to receive the weekly email and the period.