



Year-End Processes

User Guide

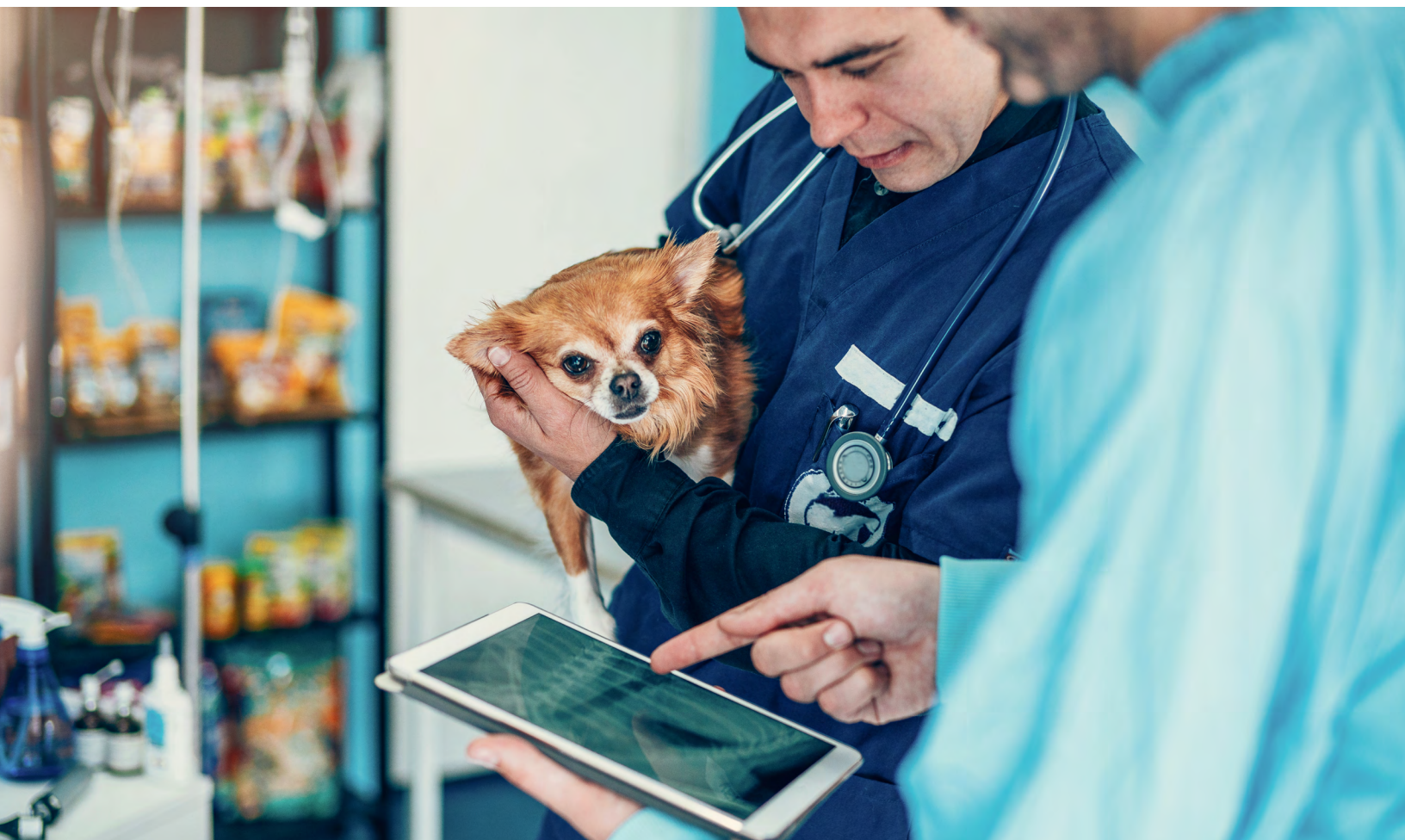


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Holiday Preparation

How can I find top spenders for the year?

If you want to run a report that will show you the top spending clients for your practice, the Client Report will provide that information using the following settings.

For the date range filter, you will only want to use the filter for Amount Spent Date Range. Enter your starting and ending dates.

Click on Generate and the report will be created. It will display all of your clients based on the amount spent, highest to lowest. You can then export it to Excel® and filter on the number of clients to get the top 100, 200, etc.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/115004332333-How-do-I-run-a-report-for-my-top-spending-clients>

How can I send a Christmas Card email to all of our clients?

Many practices like to create newsletters using PDF files and send them out to their clients on a regular basis. Using Pulse's email templates, you can create these newsletters and embed your PDF files to send to your clients.

First you must create your newsletter and save it as an image file. This will need to be done outside of the Pulse software. Once you have your image files for each page, you will need to open them in your photo editing software and resize them. We use and recommend a program called Snagit, but any photo editing software will work. A free option for Windows users is Paint.net (<http://www.getpaint.net/index.html>).

We recommend resizing your images so they are no wider than 800 pixels. Height does not matter.

Once you have resized your images and saved them to your computer, you can add them to your email template:

1. Go to the **Menu > Settings > Client Engagement > Email Templates** menu.
2. Click **Add a New Email Template**.
3. Give the newsletter a name. This will be the name you see internally.
4. Give the newsletter a subject. This will be the subject of the email that your clients see.

5. Insert the previously created image by performing a copy/paste into the template editor, or by clicking on **Insert** menu > **Image**, then browse to the saved image file.
6. Add additional images and resize files as needed.
7. Click **Save**.

Now your Email Template is ready to be sent to clients. To do so you will need to run a client report, click Send Mass Communication, choose this email template, and click process as outlined in this article: [Sending a Mass Email to Clients](#).

Knowledge Base Link:

<https://cvtet.my.site.com/pulse/s/article/211039898-How-can-I-create-a-announcement-style-email-template-from-a-PDF-file>

How can I send a mass email about holiday hours?

Quickly and easily send a mass communication email to all your clients for special events, important information, deals your practice has, etc. To do so you must create an email template, pull a client report, then send the email to the people on the report.

Creating an email template

1. Navigate to **Menu > Settings > Client Engagement > Email Templates**.
2. Click **Add a New Email Template**.
3. Give the email template a descriptive name, give it a subject (this will be the subject line to the email that your clients receive), and fill out the editor with the email you wish to send. Remember that you can personalize the email by using merge fields to enter client name, patient name, etc.
4. Click **Save** once you have finalized your email.

Running the client report

1. Click on **Home** to go back to the home screen/calendar.
2. Click **Reports**.
3. Click on the edit pencil next to **Client Report**.
4. Click **New Run**.
5. Clear out all dates and title the report to run it for all clients, or filter for a date range to catch those added in a given time period.
6. Click **Generate**.
7. Choose the **Mass Communication** link.
8. Choose the correct template and select all emails, then click on the **Process** button. Note that the button will not be displayed until you select a template and at least one client in the report to email.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/205607198-How-do-I-send-a-mass-email-to-clients>

How do I block off calendars for holidays?

During the course of the year, you may want to close your practice for holidays, vacation, etc. Here are some tips that will allow you to block off days on your calendar for these events.

Setup

1. Create an appointment type for the block offs. This can be done from **Menu > Settings > Calendar > Appointment Types**. Typical names for this are Closed, Block, Holiday. Most practices make this a black background with white font, but it can be whatever you choose.
2. Create a Calendar resource named 'Closed'. This can be done from **Menu > Settings > Calendar > Calendar Resources**.

Scheduling

1. If you use a Calendar Resource schedule, on the desired day you want to close, remove all other resources and add the 'Closed' resource. This can be done from **Menu > Settings > Calendar > Calendar Resources**. When removing unwanted resources, be sure to only remove the resource for that day and not from a repeating appointment (if prompted).
2. Once you only have one resource for that day, schedule an appointment for your business hours using the 'Closed' appointment type and resource.
3. If you do not use custom calendar resources, you will need to create the block off appointment for all default resources on the calendar.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/360038257733-How-do-I-configure-appointment-blocks-for-holidays-or-office-closures>

How can I print address labels for all of my clients?

If you have the need to print all of your client addresses to labels for easy mailing of a newsletter or holiday cards, there is a way to do this using the Client Report and the DYMO® software (outside of Pulse). Once you have created the report, you will export it to Excel by clicking on the Excel icon. This can then be imported into the DYMO software which will allow you to print the addresses.

Here is a link to a YouTube video that shows how to use Excel and the DYMO software:

<https://www.youtube.com/watch?v=OdKty5-W62s>

Knowledge Base Link

<https://cvet.my.site.com/pulse/s/article/115004358333-How-to-print-client-address-labels>

End-of-Year Preparation

How can I find total sales for the year?

When running the Sales Report for the year it is recommended not to include any breakdowns simply because that can cause the report generation to take an exponentially longer amount of time. If you want to include any breakdown options when running the Sales Report, it is recommended to run the Sales Report for each month of the year and including the breakdown in those reports.

For total sales, run a new report for the desired time frame and include the Cash Summary. If you need tax totals as well, include the Tax Summary in your report run.

Knowledge Base Link

<https://cvet.my.site.com/pulse/s/article/115004787334-How-do-I-run-reports-for-end-of-year>

How can I find Accounts Receivable at end-of-year?

To get a list of the entire amount due, uncheck the 'use date range' and set the overdue period to All. It is recommended to run this as close to January 1 as possible. If you forget to run it at that time, you can run it with a date range with the end date of 1/1.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/115004787334-How-do-I-run-reports-for-end-of-year>

How do I report on inventory counts at year-end?

A scheduled run for the Inventory Report will be automatically inserted into your practice to record the on hand inventory on January 1. You are welcome to create your own Inventory Report scheduled run or run manually at the beginning of the year.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/115004787334-How-do-I-run-reports-for-end-of-year>

How can I increase my prices?

There is an option available for updating the cost, markup or price of billable items in bulk.

1. If you go to **Menu > Settings > Inventory > Inventory Management** (or Labs or Procedures) you will see a section named **Update Options** that you can expand.
2. There you will be able to select which one you would like to change by clicking on the check box to enable it. You will then be presented with three new options:
 - a. Cost Increase by Percentage (** Increase Cost by X percent. **)
 - b. Cost Value (** Set Cost to specified amount. **)
 - c. Cost Decrease by Percentage (** Decrease Cost by X percent. **)
3. For the percentages, you would simply enter it in as 10 for a 10% change.



Pricing changes will NOT affect lot pricing, tier pricing, or package level pricing overrides.

We recommend that when you first do an update select a specific category and/or item from the search options so you can see the change being made. There is not a way to reverse the change.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/360027351053-How-do-I-update-billable-items-in-bulk>

Do reference lab prices automatically update?

The cost of lab items does not automatically get updated from third parties.

How can I find my top selling items by quantity?

The usage report in the system will allow you to see how different treatments have been used based on specified criteria over a period of time.

Creating a new run:


1. Click on **Menu > Reports**.
2. Edit a **Usage Report** type.
3. Click on **New Run**.
4. Give that report a name.
5. Enter the date range in which you would like to see treatment usage. The date range is the only required filter.
6. Next, there are several optional filters. Hovering over the blue question mark icon next to each of these filters will give you more information on each of them.
7. Once the overall filters have been set up you can further limit the client and patient information.
8. Clicking on the Client Information section will allow you to filter the information by the client's county. *Please note: this is specifically for your rabies tag reporting.*
9. Clicking on **Patient Information** will allow you to filter by patient species.
10. Now you can select which treatments you would like to include on the report from your packages, inventory items, procedures, and labs.
11. Once you have selected all your filters and selected treatments, click **Generate**.
12. The file will take a moment to generate. Once it is finished you will be taken to a screen where you can download the file as a PDF file, Excel file, or view the results in the web page by scrolling down.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/206263177--How-do-I-configure-and-run-the-Usage-Report>

How can I generate a list of charges for a single patient?

To generate a Patient Charges Report for a single patient:

1. From the patient's medical record page, click the icon that resembles a paper  on it.
2. On the next page, specify the desired date range and click **Generate**.
3. The report can then be exported to Excel or to PDF.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/1260805166070-How-do-I-print-an-individual-patient-s-charges>

How can I generate a list of charges for a single client?

If you need to print payment history for a specific client for a specific time, you can get this information by performing the following steps:

1. From the client's page, click the **View History** icon.
2. On the **Payment History** page, expand the History filters section.
3. Enter desired beginning and end dates and any other filters needed. Click **Update View**.
4. Once the page has been updated and refreshed, click the print or email icon at the top of the page to only print the date range selected.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/360038285433-How-to-print-individual-client-payment-history-for-a-specific-period-of-time>

How do I generate a list of clients who have not had a payment or visit recently?

To find a list of active clients who have not visited or made a payment in a certain time frame, you can run the 'Inactive Client Report' to obtain this information.

1. To add the report, go to your Reporting Dashboard, select **Create** link. Type in the name **Inactive Client Report**, and select the type **Inactive Client Report**.
2. Go to the Employee Dashboard, and add the report rights to each employee that should have access to the report.
3. Once the report has been created and rights have been granted, you can generate a new run of the report. The report will allow you to filter clients by **Last Visit Date**, **Last Payment Date** and **Date Created Prior To**.



There is not a way to update these clients to be inactive in bulk, but we hope to have this available in the future.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/360037792514-How-do-I-configure-and-run-the-Inactive-Client-report>

What is done with QuickBooks® Online for year-end?

Anything you need to do in QuickBooks Online is external to the Pulse application and it's recommended to work with QuickBooks or your accountant for further information. There is nothing to 'reset' in Pulse as the push integration will continue to function.

How do I change my tax rate?

To change your tax rates or setup, click on Menu > Settings > Billing > Payments. From there, you will see a Tax Setup section where you can change your desired tax settings.

Knowledge Base Link:

<https://cvet.my.site.com/pulse/s/article/360038286573-Pulse-Tax-Setup>