



AVImark<sup>®</sup>  
Year-End Processes

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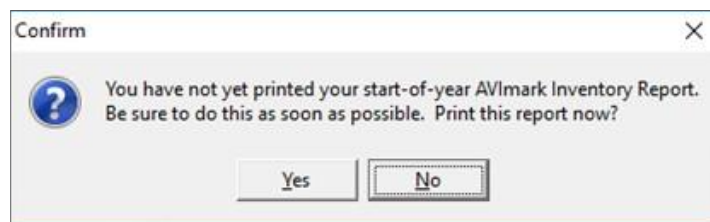
# AVImark® Year-End Processes

## Update Inventory Fiscal Year Start Date

At the beginning of the year, AVImark will prompt to print the Inventory Report as soon as AVImark is opened. The prompt will continue to display until the report is printed.

The Inventory Report will always print with the current On Hand and Stock Value. This is why it is necessary to print the Inventory Report at the end of the year so you will know what the On Hand and Stock Value was at the end of the year.

Technical Support cannot provide a clinic with how much inventory was On Hand or the Stock Value at the end of the year, unless they printed and saved this report at the beginning of the year.




This option will prompt for printing your annual Inventory Report on a user defined start-of-year date.

Setting this date to the start of your clinic's year will allow the reminder, "You have not yet printed your start-of-year AVImark Inventory Report. Be sure to do this as soon as possible. Print this report now?", to be displayed. This warning will persist until the Inventory Report is physically printed.



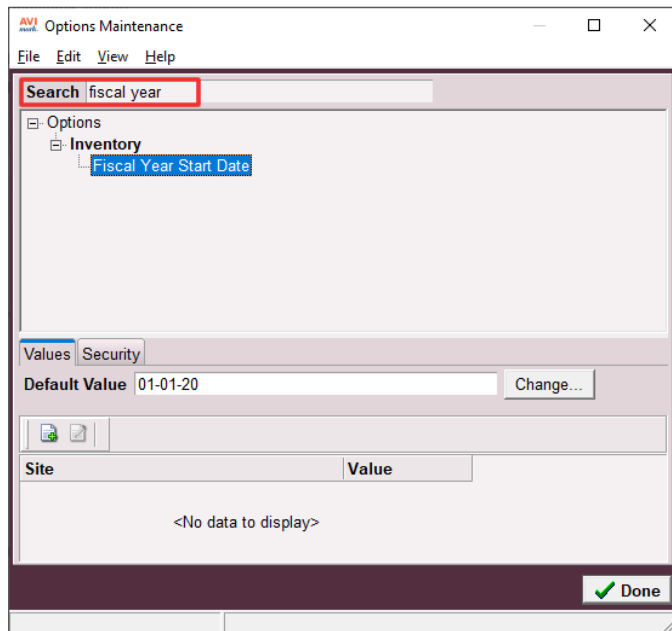
**In AVImark this is not a Financial Year Start Date; it ONLY affects the prompt for printing the EOY Inventory Report to get the stock value.**

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The Fiscal Year Start Date can be adjusted by selecting the wrench () icon, above the client area, for Advanced Options.

1. In the Search field, at the top, enter **fiscal year**.
2. Click the option that appears below - **Fiscal Year Start Date**.

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3. If the date needs to be adjusted in the Default Value, click the **CHANGE** button.
4. Check that <no data to display> is showing below the Default Value unless another clinic is sharing the same AVImark database that wants a different Fiscal Year Start Date.

## Inventory Report

In order to find the value of the on hand inventory at the end of the year, print the Inventory Report at that time.

- You cannot go back and print the Inventory Report for a date in the past, nor can the date be changed on the computer to a past date then try to print the report.
- The reason you cannot print for a date in the past is because AVImark does not store past on hand quantities. The stock value is the on hand quantity multiplied by the average cost.

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Date: mm-dd-yy		Loving Care Animal Hospital INVENTORY REPORT							Page: 1			
Code	Description	U/M	Price	On hand	Avg cost	Stock value	Unit cost	Pkg. cost	Codes	Cls	Last sold	Document
<b>CONTROLLED DRUGS</b>												
BAA	baa	(none)	40.00	31	0.000	0.00	0.000	0.000	F	11	10-10-19	
4301	Beuthanasia-D	mL	0.00	65.50	0.336	22.01	0.338	0.338	FC	11	01-15-10	
7323	Buprenorphine 0.3 mg/mL	mL	11.99	14.42	3.738	53.90	3.691	3.691	F	11	07-21-07	
3005	Butorphanol 10 mg	Tablet	1.99	41.75	0.616	25.72	0.620	0.620	FC	11	10-09-19	
3006	Butorphanol 10 mg/mL	mL	14.99	22.08	3.642	80.42	3.631	3.631	FC	11	04-23-20	
3007	Butorphanol 5 mg	Tablet	1.99	180	0.956	172.08	0.953	0.953	FPCA<	11	10-10-19	
4806	Diazepam 5 mg/mL	mL	5.99	86	0.293	25.20	0.125	0.125	FVC<	11	04-23-20	
3028	Ketamine 100 mg/mL	mL	2.99	43.28	0.027	1.17	0.000	0.000	FVC<	11	04-23-20	
0356	Ketamine HCL Injection (cc) Equine	(none)	2.99	2	0.000	0.00	0.000	0.000	F<C	11	12-31-02	
3039	Morphine Sulfate 15 mg/mL	mL	1.99	29.52	0.689	20.34	0.681	0.681	FC<	11	10-10-19	
3034	Oxymorphone HCl 1.5 mg/mL	mL	13.99	0	5.157	0.00	3.700	3.700	FC<	11	07-24-05	
3035	Pentothal Thiopental sodium 5%	mL	0.00	0	0.150	0.00	0.150	0.150	FC<	11	12-31-02	
5508	Phenobarbital 130 mg/mL	mL	2.99	29	1.420	41.18	1.420	1.420	FCV<(A	11	10-10-19	
5501	Phenobarbital 15 mg	Tablet	0.11	0	0.020	0.00	0.010	0.010	FPC<	11	12-31-02	
5502	Phenobarbital 60 mg	Tablet	0.13	1	0.000	0.00	0.000	0.000	FPC<	11	12-31-02	
TTDEX	ttdex	(none)	0.00	1	0.000	0.00	0.000	0.000	F	11	10-09-19	
<b>CONTROLLED DRUGS</b>						<b>442.02</b>						

- You can print the report to EXCEL, XPS document writer, PDF or some other print to file type printer to avoid physically printing it.
- If you preview the report, then print from the preview. The system will NOT see the report as printed and will continue to prompt.
- You can print this report from the prompt upon reaching the Inventory Fiscal Start Date or go to **Work with > Inventory List**. On the Inventory List menu bar, click on **File > Print > Inventory Report**.
- Select the option for **Fiscal inventory format** to get a space to write in the actual stock value after counting. It will then be necessary to update the on hand amounts in AVImark manually, afterwards.

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# AVImark® Year-End Processes

**AVI** Inventory Report

**Organize by:**

- Category** (All categories)
- Vendor** (All vendors)
- Neither**

**Sort by:**

- Code**
- Price**
- Location**
- Description**
- Cost**

**Restrict to:** Expiring on or before

Report codes  Action codes

**Options:**

- Totals only
- Fiscal inventory format**
- Show obsolete items
- Item details
- Include drug labels
- Sales
- Don't print cost values

Print To: Adobe PDF  Preview

Print  Quit  Help

## A List of Items Expiring

To see a list of all items that are expired, print the Inventory Report.

1. From the CID menu, go to **Work with > Inventory List**.
2. From the Inventory List menu, click on **File > Print > Inventory Report**.
3. In the Organize by section, set **Category** to **(All Categories)**.
4. In the Restrict to area, **Expires on or before**, enter in today's date.

# AVImark® Year-End Processes

AVI Inventory Report

**Organize by:**

**Category** (All categories)   
 **Vendor** (All vendors)   
 **Neither**

**Sort by:**  **Code**  **Price**  **Location**  
 **Description**  **Cost**

**Restrict to:** Expiring on or before   
Report codes  Action codes

**Options:**

**Totals only**  **Fiscal inventory format**  
 **Show obsolete items**  **Item details**  
 **Include drug labels**  **Sales**  
 **Don't print cost values**

Print To  Adobe PDF  **Preview**

5. Click on Print.

## Returning a Product Back to the Vendor

1. From the CID menu, click on Work with > Inventory List and locate the Item by using the Find field.
2. Right-click on the Item and choose P/O History.
3. Select the appropriate order then right-click > Return.

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Date	Vendor	Cost (pkg)	Qty	P/O No.	Invoice
09-11-19	Purina	12.340	1	19091101	1234
06-23-05	Hills P	12.340	2	03061903	98837598
04-14-05	Hills P	12.340	2	03041101	98542130
04-07-05	Hills P	12.340	2	03040101	98510006
01-02-05	Hills P	12.340	-1	EXPIRED	98132261
01-25-04	Hills P	11.720	1	02012301	96792457
01-25-04	Hills P	0.000	1	02012301	96792457

4. Enter the quantity being returned as a negative value.
5. Click **Done** on both windows.
6. AVImark will deduct the amount from the item's On Hand quantity.

Change P/O History for: Canine b/d 10 lbs

Vendor: Purina Date: 09-14-20

P/O No.: 19091101 Invoice No.: 1234 Qty: -1

Pkg cost: 12.340

## Reports

When printing reports at the end of the year, it will not be necessary to print on the last day of the year, as AVImark will allow you to print reports for any period no matter what the current day is.

1. To print reports, from the CID menu, go to **Work with > Reports**.
2. Select the **Period** and which reports to print by using the arrows to move the name of the report to the **Print These** column.

The reports that Technical Support recommends you print are:

- ◇ Inventory Report
- ◇ Income by Treatment

# AVImark® Year-End Processes

- ◇ Period Totals
- ◇ Unposted Transactions
- ◇ Sales Summary
- ◇ Referral Report

## Income by Treatment Report

This report provides a detail of income received for each treatment and item totaled by category.

Date of Report: 09-14-20 For period: 01-01-20 - 12-31-20		Loving Care Animal Hospital INCOME BY TREATMENT												Page1 Consolidated		
Category/Description	Income	% Total	Usage	Expense	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>ANESTHESIA, INHALATION</b>	<b>31.00*</b>	<b>1.3</b>	<b>1.00*</b>	<b>2.74</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Anesthesia, Induction	31.00	1.3	1.00	2.74	0	0	0	1	0	0	0	0	0	0	0	0
<b>BOARDING</b>	<b>21.00*</b>	<b>0.9</b>	<b>1.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Boarding, Canine 0-25 lbs.	21.00	0.9	1.00	0.00	0	0	1	0	0	0	0	0	0	0	0	0
<b>DENTAL ABNORMALITIES</b>	<b>650.00*</b>	<b>27.6</b>	<b>2.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Planned Extraction Tooth	125.00	5.3	1.00	0.00	0	0	0	0	0	0	0	1	0	0	0	0
Restoration	525.00	22.3	1.00	0.00	0	0	0	0	0	0	0	1	0	0	0	0
<b>DENTAL, ANCILLARY</b>	<b>84.00*</b>	<b>3.6</b>	<b>1.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Dental Prophylaxis, Grade II	84.00	3.6	1.00	0.00	0	0	0	1	0	0	0	0	0	0	0	0
<b>GROOMING</b>	<b>15.00*</b>	<b>0.6</b>	<b>2.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Groom, Miscellaneous	0.00	0.0	1.00	0.00	0	0	0	0	0	0	1	0	0	0	0	0
Tooth Brushing	15.00	0.6	1.00	0.00	0	0	0	0	0	0	1	0	0	0	0	0
<b>LABORATORY, EQUINE</b>	<b>147.00*</b>	<b>6.2</b>	<b>3.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Antech (4444) Pre-op Profile	79.00	3.4	1.00	0.00	0	0	0	1	0	0	0	0	0	0	0	0
Heartworm Test	68.00	2.9	2.00	0.00	0	0	0	1	0	0	1	0	0	0	0	0
<b>PROFESSIONAL SERVICES, EQUINE</b>	<b>874.50*</b>	<b>37.1</b>	<b>18.00*</b>	<b>0.00</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>4</b>	<b>4</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Annual Physical Exam, Multiple	105.00	4.5	2.00	0.00	0	0	0	2	0	0	0	0	0	0	0	0
Annual Physical Examination	600.00	25.5	10.00	0.00	0	0	5	3	0	0	2	0	0	0	0	0
Complimentary Nail Trim	0.00	0.0	3.00	0.00	0	0	0	1	2	0	0	0	0	0	0	0
Examination/Consultation	60.00	2.5	1.00	0.00	0	0	1	0	0	0	0	0	0	0	0	0
Examination/Consultation, Brie	52.50	2.2	1.00	0.00	0	0	1	0	0	0	0	0	0	0	0	0
Examination/Consultation, Mult	57.00	2.4	1.00	0.00	0	0	1	0	0	0	0	0	0	0	0	0
<b>VACCINATION, AVIAN</b>	<b>229.00*</b>	<b>9.7</b>	<b>13.00*</b>	<b>42.91</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Canine Bordetella Annual	75.20	3.2	5.00	7.27	0	0	0	2	0	0	3	0	0	0	0	0
Canine DA2PP Annual	84.00	3.6	3.00	3.94	0	0	0	2	0	0	1	0	0	0	0	0
Canine Rabies 3 Year	15.80	0.7	3.00	18.63	0	0	0	3	0	0	0	0	0	0	0	0
Lyme Disease Vaccination 1st	27.00	1.1	1.00	6.53	0	0	0	1	0	0	0	0	0	0	0	0
Lyme Disease Vaccination Annu	27.00	1.1	1.00	6.53	0	0	0	0	0	0	1	0	0	0	0	0
<b>CONTROLLED DRUGS</b>	<b>72.71*</b>	<b>3.1</b>	<b>4.00*</b>	<b>11.21</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Butorphanol 10 mg/mL	44.97	1.9	3.00	10.92	0	0	0	3	0	0	0	0	0	0	0	0
Diazepam 5 mg/mL	27.74	1.2	1.00	0.29	0	0	0	1	0	0	0	0	0	0	0	0
<b>HEARTWORM/FLEA/TICK</b>	<b>141.29*</b>	<b>6.0</b>	<b>9.00*</b>	<b>24.23</b>	<b>0</b>	<b>0</b>	<b>6</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Heartgard Plus Brown (51-100 l	28.24	1.2	2.00	6.37	0	0	1	0	0	0	1	0	0	0	0	0
Heartgard Plus Green (26-50 lb	31.74	1.3	2.00	2.91	0	0	1	1	0	0	0	0	0	0	0	0
Nexgard Orange 1-10 lbs	0.00	0.0	1.00	0.00	0	0	1	0	0	0	0	0	0	0	0	0
Nexgard Red 60-121 lbs	0.00	0.0	1.00	0.00	0	0	0	0	0	0	0	1	0	0	0	0
Revolution Canine 21-40 lbs 12	40.00	1.7	1.00	5.60	0	0	1	0	0	0	0	0	0	0	0	0
Revolution Canine 5-10 lbs 30	30.00	1.3	1.00	5.00	0	0	1	0	0	0	0	0	0	0	0	0

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You may also run this report by using Report Codes. Example: If L is set up for laboratory treatments/ items and you want to print out an income report for only these treatments/ items, just type in L in the Report Code field in the Work with > Reports window, and print this report. Only the treatments/items with this report code, or categories marked as such will print out on this report.

This report will show the following information:

- **Income** - The amount that has been charged to a client's accounting.
- **% Total** - The percent of income this item/treatment makes up of the total percent of the category. Calculated by the income divided by total income for the category.
- **Usage** - The quantity entered when the treatment or item was entered into Medical History.
- **Expense** - This amount comes from the Average Cost field for inventory items (calculated by Average Cost multiplied by quantity entered into Medical History). For Treatments, this amount only comes from inventory that is linked through Inventory Used using Average Cost for the items multiplied by quantity.
- **Months** - The total quantities dispensed for that month.

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## Period Totals Report

The Period Totals report provides Total Payments, Production by Provider, Taxes, etc.

Date of Report: mm-dd-yy For: mm-dd-yy - mm-dd-yy		Loving Care Animal Hospital PERIOD TOTALS			Page: 1 (Consolidated)
	TOTAL	COUNT	AVERAGE	% TOTAL	
Cash Payments	2066.26	7	295.18	85%	
Check Payments	216.26	1	216.26	9%	
Mastercard Payments	56.44	1	56.44	2%	
Visa Card Payments	100.00	1	100.00	4%	
<b>Total Payments</b>	<b>2438.96</b>	<b>10</b>	<b>243.89</b>	<b>100%</b>	
Production by Provider					
David N. Sharp, DVM	2114.20	10	211.42	90%	
Janet B. Wills, DVM	87.00	1	87.00	4%	
Steve T. Porter, DVM	81.00	2	40.50	3%	
Dr. *In	74.09	1	74.09	3%	
<b>Total Invoices</b>	<b>2356.29 *</b>	<b>12</b>	<b>196.35</b>	<b>100%</b>	
Late Charges	0.00 *	0	0.00		
Adjustments	454.48 *	20	22.72		
<b>Subtotal of Charges</b>	<b>2810.77</b>				
	On	Tax			
State tax	1401.50	87.59			
Local tax	1401.50	17.53			
<b>Total Tax</b>		<b>105.12 *</b>			
Non-state taxed	1409.27		(Subtotal of Charges minus State Tax amount)		
Non-local taxed	1409.27		(Subtotal of Charges minus Local Tax amount)		
<b>Total Charges</b>	<b>2915.89 **</b>				
Net change in A/R	476.93				
New Clients		2			
Patient visits		15			

- **Totals for payment types** - All Payment Types taken for the period along with a count for how many times the payment type was entered into AVImark.
- **Average and Percentage Columns** - The average amount of each payment type and the percentage of the payment type.
- **Production by Provider** - This is the actual amount charged during this time frame, not what was actually paid to the doctor.

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- **Count** - Displays the number of times the doctor has appeared on invoices. The Average column will display the average invoice amount for each doctor. The Percentage column will display the percentage of production for each doctor.
- **Total Invoices** - The total amount of treatments/items/diagnosis/problems for all doctors, the number of invoices, and the average invoice amount.
- **Late Charges and Adjustments** - Reported with the number of times appearing on invoices and the average amount.
- **Tax Totals** - Total state and local tax values will be reported along with the amount that was actually taxed.
- **Total Charges** - Calculated by the total Production by Provider plus Tax amounts.
- **Net change in A/R** - Calculated by The Total Charges minus the Total Payments (this amount should reconcile with the Account Summary).
- **New Clients** - The number of new clients with first accounting dates in the reported period.
- **Patient Visits** - The number of closed invoices each patient is listed on. If a client brings in two pets and they are on the same invoice, it will count as two visits.

## Unposted Transactions

This report simply lists all transactions that have not been posted to accounting and provides a subtotal of the unposted amount for each client and a total at the bottom.

- **Account, Client, Patient** - The client account number, name, and patient name.
- **Date** - The medical history date.
- **Description** - The description of the service.
- **Amount** - The amount of the unposted service or item.
- **Unposted Total** - The total of all unposted medical history.



**AVImark prints all unposted transactions regardless of any date range you select so it is not necessary to select a period.**

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## Sales Summary

This report identifies production generated by **Admitting Doctor**. On the surface, this report is identical to the Transaction Summary report.

This report, however, is designed to be printed **by doctor**. The **Admitted By** field (in the **Enter Medical History** window) is used for clinics that want to compensate the doctor who admitted the patient, but may not have been the doctor who actually performed the services.

If no **Admitting Doctor** is specified, then the performing doctor is assigned as the admitting doctor by default.

Date of Report: mm-dd-yy For period: mm-dd-yy - mm-dd-yy		Loving Care Animal Hospital SALES SUMMARY												Page1 Consolidated		
Category/Description	Income	% Total	Usage	Expense	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Anesthesia, Inhalation	31.00*	1.3	1.00*	2.74	0	0	0	1	0	0	0	0	0	0	0	0
Boarding	21.00*	0.9	1.00*	0.00	0	0	1	0	0	0	0	0	0	0	0	0
Dental Abnormalities	650.00*	27.6	2.00*	0.00	0	0	0	0	0	0	0	2	0	0	0	0
Dental, Ancillary	84.00*	3.6	1.00*	0.00	0	0	0	1	0	0	0	0	0	0	0	0
Grooming	15.00*	0.6	2.00*	0.00	0	0	0	0	0	0	2	0	0	0	0	0
Laboratory, Equine	147.00*	6.2	3.00*	0.00	0	0	0	2	0	0	1	0	0	0	0	0
Professional Services, Equine	874.50*	37.1	18.00*	0.00	0	0	8	4	4	0	2	0	0	0	0	0
Vaccination, Avian	229.00*	9.7	13.00*	42.91	0	0	0	8	0	0	5	0	0	0	0	0
Controlled Drugs	72.71*	3.1	4.00*	11.21	0	0	0	4	0	0	0	0	0	0	0	0
Heartworm/Flea/Tick	141.29*	6.0	9.00*	24.23	0	0	6	1	0	0	1	1	0	0	0	0
Medications - Oral	62.85*	2.7	31.00*	10.15	0	0	0	1	0	0	0	30	0	0	0	0
Vaccine	27.94*	1.2	2.00*	1.45	0	0	0	0	0	0	0	2	0	0	0	0
	2356.29**	100.0	87.00**	92.73	0	0	15	22	4	0	11	35	0	0	0	0



The average cost of inventory used is included in the Expense column for treatments but inventory used does not appear on this report under its own category name.

This report is identical to the Transaction Summary except that it shows posted charges for the Admitting Doctor. If you do not pay an admitting doctor for admitting patients when they are not the providing doctor, you should not print this report because it will not be accurate. You should print the Transaction Summary instead.

- **Category/Description** - The category names appear in this order: Treatments, Items, and Diagnoses. If the Category name is blank, it may be because the code was deleted or changed, or there was an entry in medical history with no code.



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- **Income** - The amount of income generated by each category. The asterisks are just to distinguish this report from the Transaction Summary.
- **% Total** - The percentage of income generated by each category. The formula for figuring the % Total for category: divide the category total by the total Income for all categories (treatment/inventory/diagnosis).
- **Usage** - The actual quantity sold from each category.



The asterisks were added to distinguish this report from the Transaction Summary.

---

- **Expense** - Looks at the Cost field of the treatment and the average cost of inventory (sold or used).
- **Months** - Each month column shows the quantity sold during the reporting period.



The Usage shows the actual amount but the month column rounds quantities that are less than a whole number. If the qty sold is .5 or less, it rounds it to zero. If the qty is .51 or more, it rounds it to 1.

---

- **Totals** - The total of all columns.



The total usage is the combined totals for the months. The asterisks were added to distinguish this report from the Transaction Summary.

---

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## Referral Report

The Referral Report identifies any clients who were added into the AVImark program during the period of time requested and had services or items posted to Medical History equaling more than a zero dollar amount.

Date of Report: mm-dd-yy For period: mm-dd-yy - mm-dd-yy		Loving Care Animal Hospital REFERRAL REPORT		Page: 1 (Consolidated)	
Date	Phone	Client	Patient	Charges	Payments
<b>REFERRALS BY CLIENT</b>					
05-05-20	573-555-5874	Larsen, Joe	Javy	105.00	56.44
Totals for Facebook:		1	1	105.00	56.44
08-07-20	573-555-1825	Foley, Anna and Benja	Fiona Logans Run Nai'a	1012.73	337.61
Totals for Marcia & Frank James (10):		1	3	1012.73	337.61
Totals for client referrals:		2	4	1117.73*	394.05*
<b>REFERRALS BY BUSINESS</b>					
05-05-20	573-555-5874	Larsen, Joe	Javy	105.00	56.44
Totals for Facebook:		1	1	105.00	56.44
Totals for referrals by business:		1	1	105.00*	56.44*
Totals for all referrals:		2	4	1117.73**	394.05**



Clients will appear on this report when any of the following applies: a) A client must have been added to the system and have either transactions on an open or closed invoice. The invoice amount cannot be zero. b) A client must have been added and have a payment (it doesn't have to be on an invoice).

# AVImark® Year-End Processes

The option to “Report all Referrals” will cause a referred client who has accounting (other than just type A and B) during the reporting period to appear on the report regardless of when they were added.

- **Date** - The date the invoice was posted to accounting. If the invoice is open or there is no invoice, the date will be (none). Each invoice will be listed on a separate line.
- **Phone, Client, Patient** - The new client who was referred, their phone number and patient name.
- **Charges** - The invoice total without tax.
- **Payments** - The payment amount. Multiple payments on the same invoice will be combined as one payment.
- **Totals** - The name and total amounts for the Referral source.

## Printing Reports to Excel

Any report in AVImark can be printed to Excel. The only requirement is that Excel must be installed on the computer you are printing the report from.

- To print reports, go to **Work with > Reports**. Select the Period and which reports to print by moving the name of the report over to the **Print These** column.
- In the End-of-Period Reports window, choose the drop-down for **Print To** and select **Excel**.

End of Period Reports

Print by

Period: Year  
Start: 01/01/2020  
End: 12/31/2020

Doctor: Consolidated  
Print To: Adobe PDF  
Sort by: Name

Report code  
Client code: 0  
Income options

PRINT THESE.. Save


Accol  
Audit  
Comr

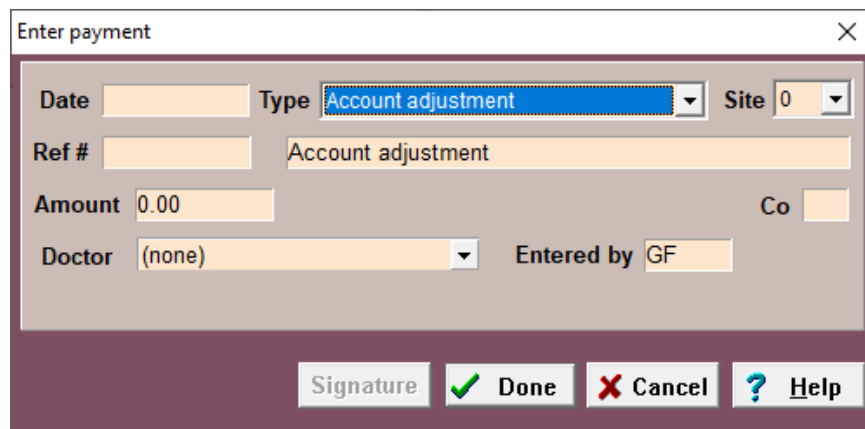
# AVImark® Year-End Processes

## Accounting

### Account Adjustments/Write Offs

Use the Account Adjustments in AVImark when you need to modify a client's balance but there is not any money transactions taking place. One example would be Write Offs.

1. Click on the Accounting () speed bar button on the CID to open the client's accounting window.
2. Right-click > New.
3. Select **Account Adjustment** from the **Type** drop-down list.
4. In the field underneath the **Type** field, you can backspace out **Account adjustment** and fill in the reason as to why you are adjusting their account.
5. Enter the negative dollar amount into the **Amount** field.
6. Click **Done** on the Payment window.



Enter payment

Date  Type **Account adjustment** Site

Ref #


Amount  Co

Doctor  Entered by

If you are using the Income By Provider report to pay the doctors at your clinic, all Account Adjustments will look like a payment on that report. Please call AVImark Technical Support at 877-838-9273 for more information.

# AVImark® Year-End Processes

## Print All Last Year's Invoices for a Client

1. Open the client record on the Client Information Display (CID). Click on  to open the Client's Accounting window.
2. From the **Print** menu, select **History**. This will allow you to print an accounting history for this client for the time frame selected.

Date	Type	For	Code	Description	Qty	Amount	Balance
<b>Date:</b> mm-dd-yy <b>Loving Care Animal Hospital</b> <b>Page:</b> 1 <b>Client:</b> Anna and Benjamin Foley <b>CLIENT ACCOUNT REGISTER</b> <b>Account:</b> 18 1825 Spruce Street Piedmont, MO 63957 (573)555-1825							
<b>09-14-20</b>	<b>I</b>			<b>Invoice No. 169824</b>		<b>Tax: 0.00 46.15</b>	<b>696.15</b>
08-07-20	S	Fiona	3202	Amoxicillin 400 mg Tab	30	46.15	696.15
08-07-20	F	Fiona	DENT004	Extracted Tooth		0.00	650.00
<b>08-04-20</b>	<b>I</b>			<b>Invoice No. 169823</b>		<b>Tax: 0.00 650.00</b>	<b>650.00</b>
08-04-20	F	Nai'a	DENT014	Planned Extraction Tooth		125.00	650.00
08-04-20	S	Nai'a		dental		0.00	525.00
08-04-20	F	Logans Run	DENT016	Restoration		525.00	525.00
<b>08-03-20</b>	<b>I</b>			<b>Invoice No. 169822</b>		<b>Tax: 0.00 0.00</b>	<b>0.00</b>
08-03-20	C		GF	Cash Refund	0	2.06	0.00
08-03-20	C			Cash payment	0	-30.00	-2.06
<b>08-03-20</b>	<b>I</b>			<b>Invoice No. 169821</b>		<b>Tax: 0.00 27.94</b>	<b>27.94</b>
08-03-20	S	Fiona	NEXR	Nexgard Red 60-121 lbs		0.00	27.94
08-03-20	S	Fiona	9988	Rabies Vaccine		0.00	27.94
08-03-20	S	Fiona	7400	Bordetella		27.94	27.94
<b>07-27-20</b>	<b>I</b>			<b>Invoice No. 169820</b>		<b>Tax: 0.00 0.00</b>	<b>0.00</b>
07-27-20	C			Cash payment	0	-144.67	0.00
<b>07-23-20</b>	<b>I</b>			<b>Invoice No. 169819</b>		<b>Tax: 17.07 227.60</b>	<b>144.67</b>
07-23-20	V			Visa payment	0	-100.00	144.67
07-23-20	T	Nai'a	418	Lyme Disease Vaccination Annual		27.00	244.67
07-23-20	T	Nai'a	401	Canine Bordetella Annual		18.80	215.65
07-23-20	T	Nai'a	381	Groom, Miscellaneous		0.00	195.43
07-23-20	T	Nai'a	202	Annual Physical Examination		60.00	195.43
07-23-20	T	Fiona	399	Tooth Brushing		15.00	130.93
07-23-20	T	Fiona	406	Canine DA2PP Annual		28.00	114.81
07-23-20	T	Fiona	401	Canine Bordetella Annual		18.80	84.71
07-23-20	T	Fiona	202	Annual Physical Examination		60.00	64.50
<b>07-01-20</b>	<b>I</b>			<b>Invoice No. 169818</b>		<b>Tax: 3.96 61.04</b>	<b>0.00</b>
07-01-20	C			Cash payment	0	-65.00	0.00
07-01-20	T	Fiona	401	Canine Bordetella Annual		18.80	65.00
07-01-20	S	Fiona	4923	Heartgard Plus Brown (51-100 lbs)		8.24	44.79
07-01-20	T	Fiona	817	Heartworm Test		34.00	36.55

## Information Search

The Information Search allows you to locate or target a variety of information in your data including clients, patients, medical history, and accounting. The data can be sorted, filtered, printed, and exported to a variety of formats.

Information search query specifications can be saved and shared between users and Technical Support through the use of the Code Editor.

## Code Editor

1. Select the search code.
2. **Right-click > Copy.**
3. Open AVImark and go to **Work with > Information Search.**
4. Cancel (Esc) the search window and it will open a new search.
5. In the search window, click **View** at the top of the window and click **Code Editor.**
6. Highlight all text in the top of this window by holding down the **Ctrl** key and pressing the **A** key.
7. **Right-click** on the highlighted text and click **Paste.** This will paste the new code editor in the window.
8. Click **OK.** You'll get a message asking if you want to add this search, click **Yes.**
9. Click **Search** in the lower right corner to run the search. It will automatically change to the Search Results tab.

# AVImark<sup>®</sup> Year-End Processes

## Common End-of-Year Information Searches

Below are some common information search query specifications. Simply copy and paste the details within the code editor.

### Top Treatments and Items

Here are two related searches that will show you the top treatments and items by quantity dispensed/provided. If you prefer to find the top treatments and items by amount paid, you can simply double-click on Quantity in the Report Criteria section, set Descending to Unsorted, double-click on Amount, set Unsorted to Descending, and rerun the search.

This will pull all treatments, but you can choose to print 1-2 pages or send it to Excel to sort through the top producers only.

#### Top Treatments

```
search [Client] code 'M$LDR449' name 'Top Treatments'  
category 'Year End Searches' (  
[History-Date] is between '01-01-20' '12-31-20' and  
[History-Treatment] is true and  
[History-Quantity] is greater than '1'  
) report (  
[History-Code],  
[History-Quantity] summary (sum),  
[History-Amount] summary (sum)  
) sort by (1 descending) summarize by (0)
```

#### Top Inventory Items

```
search [Client] code 'MSJSB113' name 'Top Inventory Items'  
category 'Year End Searches' (  
[History-Date] is between '01-01-20' '12-31-20' and  
[History-Item] is true and  
[History-Quantity] is greater than '1'  
) report (  
[History-Code],  
[History-Quantity] summary (sum),  
[History-Amount] summary (sum)  
) sort by (1 descending) summarize by (0)
```

# AVImark<sup>®</sup> Year-End Processes

## Average Client Daily Amount

This is a slightly different value than we get from the Period Totals Average Invoice column. It will display the total number of days a client had a patient at the clinic, find that sum, and take the average. If you do a lot of boarding/hospitalized animals, your average daily total will be lower than the average invoice, and if you do almost no boarding/hospitalized animals, it will be relatively close to the average invoice.

```
search [Client] code 'M$LDR478' name 'AVG Client Daily Amount'  
category 'Year End Searches' (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Amount] is greater than '.01' and  
[Account-Account Type] equals 's,t'  
) report (  
[Client-Account],  
[Account-Date] summary (count),  
[Account-Amount] summary (sum, average)  
) sort by (0 ascending, 1 ascending) summarize by (0)
```

## Detailed Refund Report

This will show all refunds that were entered for the year. A "refund" is any payment amount that is positive, thus adding to the balance.

It does not include Account Adjustments, but you can add the type to the search line for Account Type if you would like those added.

```
search [Client] code 'MSACCT1' name 'Refunded Payments'  
category 'Year End Searches' (  
[Client-Codes] does not contain 'i' and  
[Account-Account Type] equals 'c,d,e,h,m,o,p,v,$,0,1,2,3,4,5,6,7,8,9' and  
[Account-Amount] is greater than '1.00' and  
[Account-Date] is greater than '01-01-20'  
) report (  
[Client-Account],  
[Client-Full Name],  
[Account-Amount],  
[Account-Date]  
)
```



# AVImark® Year-End Processes

## Amount Charged per Company

If you separate out your kennel, grooming, surgery, or other profit centers/companies within the hospital, then you can run this search to get a very quick glance at the amount charged per company, whether paid or unpaid. If you want more details on a company breakdown, you can also print nearly every report in **Work with > Reports**.

This search is run off the client's company, but we do have the capability of searching history for those of you that have multiple companies utilized on most clients.

```
search [Client] code 'M$LDR588' name 'Amount Spent in 2020'  
category 'Year End Searches' (  
[Account-Account Type] equals 's,t' and  
[Account-Date] datecalc year of equals '2020'  
) report (  
[Client-Company],  
[Account-Amount] summary (sum)  
) sort by (0 ascending) summarize by (0)
```

## Patients Who Have Not Visited Since

This search will find a patient that visited in 2018 or 2019, but they have not returned since.

```
search [Client] code 'M$LDR524' name 'Patient in during 2018 or 2019 but not 2020'  
category 'Year End Searches' (  
[Patient] exists in (  
[History-Date] datecalc year of equals '2018,2019'  
) and  
[Patient] does not exist in (  
[History-Date] datecalc year of equals '2020'  
)  
) report (  
[Client-Account],  
[Client-Full Name],  
[Patient-Name]  
) sort by (0 ascending)
```

# AVImark<sup>®</sup> Year-End Processes

## Income by Species

This search will break down the amount charged by species within the clinic.

```
search [Client] code 'M$LDR527' name 'Income by Species'  
category 'Year End Searches' (  
[History-Date] datecalc year of equals '2020'  
) report (  
[Patient-Species Entry-Species],  
[History-Amount] summary (sum)  
) sort by (0 ascending) summarize by (0)
```

## Monthly Discounts

This report gives you a monthly discount summary.

```
search [Client] code 'M$BB0691' name 'Monthly Discounts'  
category 'Year End Searches' (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Discount] is greater than '.01'  
) report (  
[Account-Date] datecalc month of,  
[Account-Discount] summary (sum)  
) sort by (0 ascending) summarize by sort order
```

# AVImark® Year-End Processes

## Discounts by Client

This search will find all clients who received a discount and what their total discount for the year was. Also, it will show their fiscal sales (last 12 months), so you can compare what their total discount was versus what they were ultimately charged for. It also displays the client discount class, so you should be able to see if their discount is in line with one that was approved or out of line with their discount class.

```
search [Client] code 'M$BB0690' name 'Discounts by Account'  
category 'Year End Searches' (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Discount] is greater than '.01'  
) report (  
[Client-Account],  
[Client-Full Name] width 30,  
[Client-Discount Class],  
[Account-Discount] summary (sum),  
[Client-Fiscal Sales]  
) sort by (0 ascending) summarize by sort order
```

## Amounts Spent with a Certain Code During the Year

This search allows you to specify a code, and any client who received that code, what their total was spent for the year. It is very helpful to find patients who are on any kind of wellness plan versus those who have not had a wellness plan (you can change the 'Exists in' to 'Does Not Exist in' on the first section of Clients to find the "everyone else" demographic).

```
search [Client] code 'M$BB0684' name 'Amounts Spent with Code During Time Frame'  
category 'Year End Searches' (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Account Type] equals 'c,d,e,h,m,o,p,v,$,0,1,2,3,4,5,6,7,8,9' and  
[Client] exists in (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Code] equals 'ENTER CODE HERE'  
)  
) report (  
[Client-Account],  
[Account-Amount] summary (sum)  
) sort by (0 ascending) summarize by (0)
```

# AVImark<sup>®</sup> Year-End Processes

## Payments by City

This will give a breakdown of payments made by city. The payment counts towards the client's current residence, so if they moved cities mid-year, it will show all of their payments for the current city.

```
search [Client] code 'M$BB0679' name 'Income by City'  
category 'Year End Searches' (  
[Account-Date] is greater than '01-01-20' and  
[Account-Account Type] equals 'c,d,e,h,m,o,p,v,$,0,1,2,3,4,5,6,7,8,9'  
) report (  
[Client-City],  
[Account-Amount] summary (sum),  
[Client-Account] caption 'Payments' summary (count)  
) sort by (0 ascending) summarize by sort order
```

## Total Tax for Items

This search finds all taxable items, the quantity sold, the total amount charged for, and the total tax charged per each item.

```
search [Client] code 'M$LDR431' name 'Total Tax for Items'  
category 'Year End Searches' (  
[History-Item] is true and  
[History-Account-Total Tax] is greater than '.01' and  
[History-Date] is between '01-01-20' '12-31-20'  
) report (  
[History-Code],  
[History-Description],  
[History-Account-Total Tax] summary (sum),  
[History-Amount] summary (sum),  
[History-Quantity] summary (sum)  
) sort by (0 ascending) summarize by (0)
```

# AVImark® Year-End Processes

## Inactive Clients

This search will find clients who are still active in the system (do not have the I action code) but have not had any history entries in the last # of years. Normally, this is run for 3 or 5 years. The search below is set up for 3 years. It will find any clients that have not had history in 2018, 2019, or 2020. Once you have the list you can go through and mark those clients Inactive. If there are a lot of them, we have a utility that can be run to mark them all Inactive at once. If you would like assistance with the utility, please contact Support.

```
search [Client] code 'INCLI01' name 'Inactive Clients'  
category 'Year End Searches' (  
[Client-Codes] does not contain 'i' and  
[Client] does not exist in (  
[Patient-Last Visit] is greater than '12-31-17'  
)  
) report (  
[Client-Account],  
[Client-Full Name]  
)
```

## New Clients - Match Period Totals

This search will find all new clients that actually had their first accounting within the date range set. The client added date field in the client area is not considered at all. This report should match closely with the new client's total on the period totals report.

```
search [Client] code 'RPT5566' name 'New Clients - Match Period Totals'  
category 'Year End Searches' (  
[Account-Date] is between '01-01-20' '12-31-20' and  
[Account-Account Type] does not equal 'b' and  
[Client] does not exist in (  
[Account-Date] is less than '12-31-19' and  
[Account-Account Type] equals 'i,b'  
)  
) report (  
[Client-Account],  
[Client-Full Name]  
) sort by (0 ascending) summarize by sort order
```

# AVImark® Year-End Processes

## Top Clients

This search will find all clients with a Fiscal Sales (last 12 months) amount greater than the amount you enter and will list them in order from greatest to least. If you want to find a certain number of clients, such as the top 50 or 100, you would simply raise or lower the dollar amount in the search criteria to control how many clients the search pulls.

```
search [Client] code 'RPT1080' name 'Top Clients - Fiscal Sales'  
category 'Year End Searches' (  
[Client-Codes] does not contain 'i' and  
[Client-Fiscal Sales] is greater than '500.00'  
) report (  
[Client-Account],  
[Client-Full Name],  
[Client-Fiscal Sales]  
) sort by (2 descending)
```

## Printing or Emailing Search Results



Before printing or emailing from any information search (aka query), please select a sample group from the search results and verify the desired clientele has been reached. If you need help with this, contact AVImark Technical Support at 877-838-9273, option 1.

To open the Print Query window, select the **Search** button at the bottom of the Criteria window and the Search Results tab will open. Select **Results** from the menu then click **Print**.

## Markup Prices

### Increase Inventory Prices

Increase your retail prices on a category by category basis by specifying a Markup Percentage for each inventory category.

This Markup Percentage (Pct.) for each category is a default Markup Pct. that will apply (unless otherwise specified) to all the items in that category whenever the markup is done.

If you are familiar with the purchase order function, AVImark will automatically markup retail prices when you receipt orders from a vendor (based on these markup percentages) so as to maintain a certain profit margin.



**It is always recommended you backup the program files and verify the backup prior to doing a markup. Prices cannot be marked down. If you do a markup and you are not satisfied with the results, the only options are to restore to a backup taken prior to the markup or manually adjust the prices.**

---

Here's how the markup process takes place:

1. From the Inventory Category window, click on the category to highlight it so you may work with it. If you want to markup the price of a single item, click on that single line item.
2. With the mouse pointer in the Inventory List for the selected category, **right-click > Mark Up** to open the Item Markup window, allowing you to specify what you want to markup and upon what basis.

# AVImark® Year-End Processes

## The Markup Window

When the Item Markup window is opened, you are presented with options of what you want to markup.

The screenshot shows the 'Item Markup' dialog box with the following sections:

- Increase...**: A dropdown menu set to 'Price', a checked checkbox for 'Increase break price also', and another dropdown menu set to 'Of This Category'.
- Calculation...**: A dropdown menu set to 'Multiply', a dropdown menu set to 'Markup Cost', and a dropdown menu set to 'By Markup Pct.'.
- Rounding**: A checked checkbox and a table with three columns: 'If greater than', 'Round to', and 'Then reduce by'.

If greater than	Round to	Then reduce by
1.00	0.10	0.00
25.00	0.50	0.00
100.00	10.00	0.50
- Audit reporting...**: A checked checkbox for 'Review before markup'.
- Buttons**: 'Mark Up' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a question mark).

- Use the drop-down menu to specify what you want to increase.
  - ◇ Raise the **Price** (the current retail price).
  - ◇ Raise the **Markup Cost** of each item.
  - ◇ Raise the **Markup Percent** of each item.

## Which Item(s)?

Use the drop-down menu to specify which item(s) to increase prices.

- Choose to raise the value specified in the **Increase...** field for:
  - ◇ A single selected item.
  - ◇ The items in the selected category.
  - ◇ All the items in the entire list.



# AVImark® Year-End Processes

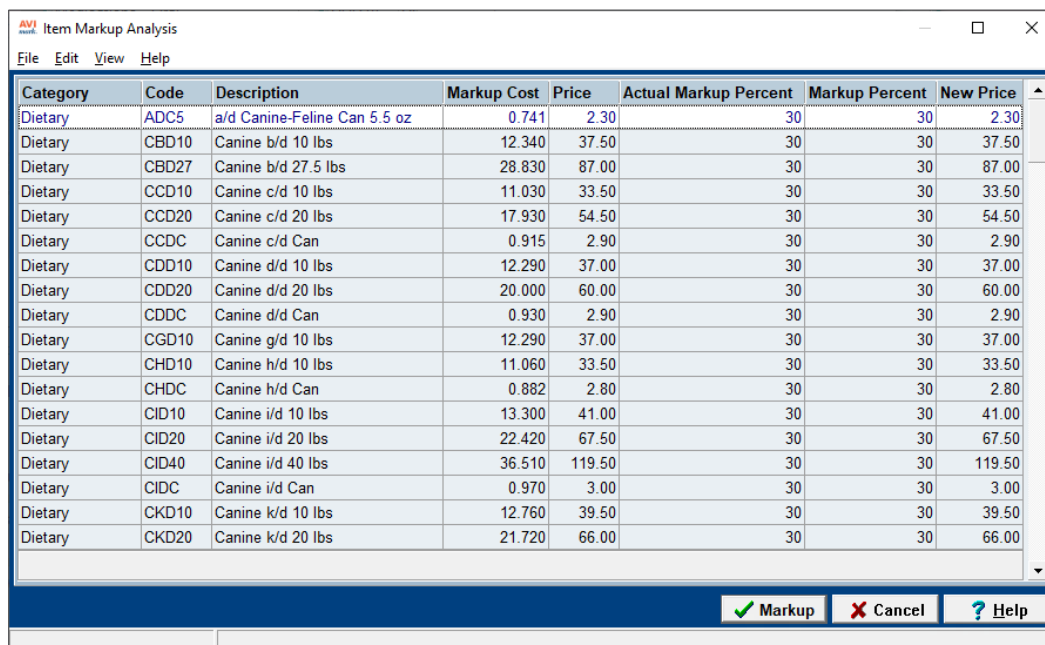
## Rounding Prices

This area in the Item Markup Analysis window gives you more control on how the prices are rounded when marked up. The default values are in place when this window is opened, but they can be edited or completely removed.

*Example:* If a Treatment or Item is greater than \$1.00 you could round to the nearest .10. You also have the option to then reduce by a certain amount, if you choose.

## Markup Analysis

This feature allows you to view the prices before finalizing the markup price. With the **Review before markup** box checked, click the **Mark Up** button opening the Item Markup Analysis window. Click in the **New Price** field and enter the markup price of your choosing before continuing with the actual markup. Print this list for a record of the Before and After prices.



Category	Code	Description	Markup Cost	Price	Actual Markup Percent	Markup Percent	New Price
Dietary	ADC5	a/d Canine-Feline Can 5.5 oz	0.741	2.30	30	30	2.30
Dietary	CBD10	Canine b/d 10 lbs	12.340	37.50	30	30	37.50
Dietary	CBD27	Canine b/d 27.5 lbs	28.830	87.00	30	30	87.00
Dietary	CCD10	Canine c/d 10 lbs	11.030	33.50	30	30	33.50
Dietary	CCD20	Canine c/d 20 lbs	17.930	54.50	30	30	54.50
Dietary	CCDC	Canine c/d Can	0.915	2.90	30	30	2.90
Dietary	CDD10	Canine d/d 10 lbs	12.290	37.00	30	30	37.00
Dietary	CDD20	Canine d/d 20 lbs	20.000	60.00	30	30	60.00
Dietary	CDDC	Canine d/d Can	0.930	2.90	30	30	2.90
Dietary	CGD10	Canine g/d 10 lbs	12.290	37.00	30	30	37.00
Dietary	CHD10	Canine h/d 10 lbs	11.060	33.50	30	30	33.50
Dietary	CHDC	Canine h/d Can	0.882	2.80	30	30	2.80
Dietary	CID10	Canine i/d 10 lbs	13.300	41.00	30	30	41.00
Dietary	CID20	Canine i/d 20 lbs	22.420	67.50	30	30	67.50
Dietary	CID40	Canine i/d 40 lbs	36.510	119.50	30	30	119.50
Dietary	CIDC	Canine i/d Can	0.970	3.00	30	30	3.00
Dietary	CKD10	Canine k/d 10 lbs	12.760	39.50	30	30	39.50
Dietary	CKD20	Canine k/d 20 lbs	21.720	66.00	30	30	66.00



It is always recommended that you 'review before markup' prior to doing a markup. Prices cannot be marked down. If you do a markup and are not satisfied with the results, the only options are to restore to a backup taken prior to the markup or manually adjust the prices.

# AVImark<sup>®</sup> Year-End Processes

To raise the **Current Price** (retail prices) of all items in a category, based on the **Markup Costs** of these items to yield a 200% profit, follow the steps below.

1. Specify a 200% Markup Percentage for the category by double-clicking on the category name, then typing "200" in the **By [Markup Pct.]** field. Click **Done** to finish.
2. Click once more on the category name to highlight it.
3. With the mouse pointer in the Item List window for this category, choose **right-click > Markup**.
4. Choose **Current Price** in the first field.
5. Choose **This Category** in the next field.
6. Choose **Multiply** in the next field.
7. Choose **Markup Cost** in the next.
8. In the last field, specify **Markup Pct.**
9. When you click **Markup**, the Markup Cost of each item will be multiplied by the value set as the Markup Percent for the category (e.g. "200"), then the result will be added to the Markup Cost to set the retail price.

## Individual Item Markup Percentages

In addition to setting a markup percentage for each category, AVImark also allows you to set Markup Percentages for EACH ITEM in the Inventory List. When you raise prices based upon Markup Costs, the Markup Percentages specified for each of the individual items (if greater than zero) will be used instead of the category Markup Percentage to set the retail price.

If the Markup Percentage for a particular item is set to Zero (0) or blank, then whatever Markup Percentage is specified for the Category will be used to set the price of the item(s).

This feature lets you set a default percentage for the category to handle the majority of items and yet still be able to handle exceptions to the category markup percentage on an item-by-item basis. Thereafter, when the markup is done, pricing is handled with much greater flexibility.

# AVImark<sup>®</sup> Year-End Processes

## Raising Retail Prices Based on Retail Prices

To raise retail prices by 10%, based on the current retail prices themselves, follow the steps below.

1. Select the **Category** name you wish to markup.
2. Move the mouse pointer into the Item list window for this category.
3. Choose **right-click > Mark Up**.
4. Choose **Price** in the first field.
5. Choose **This Category** in the next field.
6. Choose **Multiply** in the next field.
7. Choose **Current Price** in the next field.
8. In the last field, type **10**.
9. When you click **Mark Up**, the retail prices will be increased by 10%.

## Raising Markup Percentages Values

To increase your profit margin for items in a given category by 10% set the Markup Percentage for the category to a value that is 10 greater than the previous value.

***Example:** There are several items in this category for which you have specified a Markup Percentage at a different value than that for the category as a whole. In this case, you will need to raise all these individual Markup Percentages. You can do this all at once by using the AVImark markup function.*

For the example above, you would:

1. Specify a higher Markup Percentage (by 10) for the category by double-clicking on the category name, then typing that percentage (as a whole number) in the **Markup %** field.
2. Click **OK** to finish, then click the category name again to highlight it.
3. With the mouse pointer in the Item list window for this category, choose **right-click > Mark Up**.
4. Choose **Markup Percent** in the first field.
5. Choose **This Category** in the next field.
6. Choose **Add** in the next field.
7. Choose **Markup Pct.** in the next.

# AVImark<sup>®</sup> Year-End Processes

8. In the last field, specify **10**.
9. When you click **Mark Up**, the individual markup percentage of each item will be increased by 10.

After raising the markup percentages in this way, you could then raise the current price based upon these new markup percentages.

## Raising Markup Costs

When you first start setting up your inventory list, you will need to set the Markup Cost for each item. From then on, AVImark will maintain these values as the highest price paid for each item. This keeps you from accidentally setting retail prices based on a temporary bargain price you may have been able to purchase certain items for.

AVImark does this Markup Cost maintenance at the time you receipt purchase orders into stock. For this reason, you will rarely need to use the markup feature to raise Markup Cost values. However, if you aren't using the purchase order function in AVImark, you may want to handle increases in costs using the markup function.

To raise all your Markup Cost values by 10% follow the steps below.

1. Click the category name you wish to work with.
2. With the mouse pointer in the Item list window for the category, **right-click > Mark Up**.
3. Choose **Markup Cost** in the first field.
4. Choose **This Category** in the next field.
5. Choose **Multiply** in the next field.
6. Choose **Markup Cost** in the next.
7. In the last field, enter **10**.
8. When you click **Mark Up**, the individual Markup Cost of each item (if greater than zero) will be increased by 10 percent.

After raising the Markup Costs in this way, you could then raise the Current Price.

# AVImark<sup>®</sup> Year-End Processes

## Increase Treatment Prices

### Markup Prices



It is always recommended that you perform an AVImark backup with program files and verify the backup prior to doing a markup. Prices cannot be marked down. If you do a markup and are not satisfied with the results, the only options are to restore to a backup taken prior to the markup or manually adjust the prices.

When you set up your treatments, one of the things you will specify about your treatment categories is a "markup percentage". This will be the default percentage that AVImark will mark up the treatments in this category (unless otherwise directed).

With this category markup percentage set, AVImark lets you markup your treatment prices in several ways.

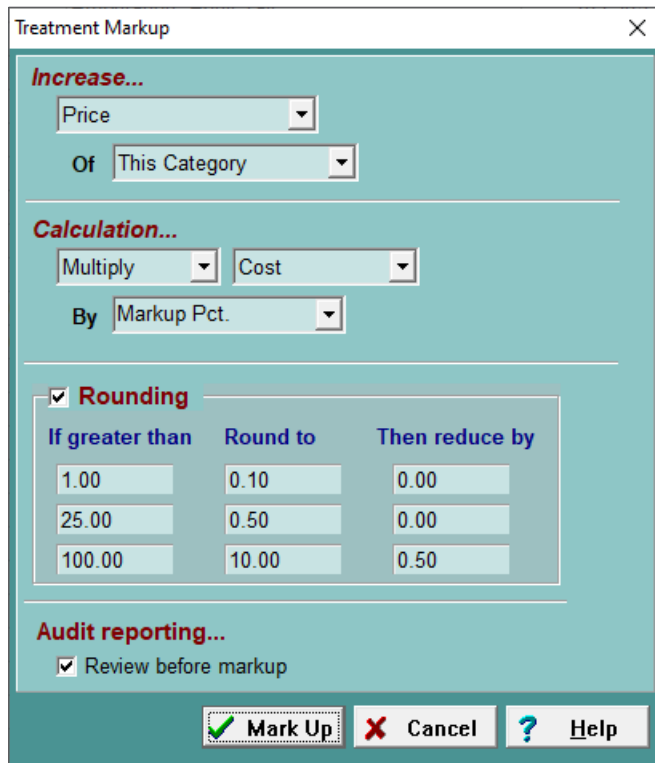
1. From the CID menu bar, click on **Work with > Treatment List**.
2. From the Treatment List window, select the category that will be getting prices marked up. If you want to verify the markup percentage set for this category, double-click on the category name.



To mark up the price of a single treatment, you will first have to indicate you want to mark up the item by clicking on it.

3. With the mouse pointer in the Category side, **right-click > Markup** to open the Treatment Markup window.

# AVImark® Year-End Processes



**Increase...**

Price

Of

---

**Calculation...**

Multiply  Cost

By

---

**Rounding**

If greater than	Round to	Then reduce by
<input type="text" value="1.00"/>	<input type="text" value="0.10"/>	<input type="text" value="0.00"/>
<input type="text" value="25.00"/>	<input type="text" value="0.50"/>	<input type="text" value="0.00"/>
<input type="text" value="100.00"/>	<input type="text" value="10.00"/>	<input type="text" value="0.50"/>

---

**Audit reporting...**

Review before markup

4. At the top of the Markup window, use the drop-down menu to specify what is going to be increased.



To markup the price of a single treatment, you would first have to select the treatment in the Treatment List that you want to markup.

5. Use the next drop-down menu to specify whether to mark up prices by the default percentage specified for your categories, or just type the percentage you wish to markup prices by (i.e. specify a whole number). In other words, if you want to markup the prices based upon what has been assigned as the category markup percentages, choose **This Category**.
6. If you want to specify a markup percentage manually, just click in the field to highlight it, then type the markup percentage as a whole number.

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# AVImark<sup>®</sup> Year-End Processes

## Rounding Prices

- You may choose to round off marked up prices larger than a certain amount to the nearest increment.
- You may subtract a specified amount from the result of the mark up to arrive at the final price.

*Example: To mark up all prices in the selected category by 5%, and at the same time round off all prices over \$10.00 to the nearest 10 cents, all prices over \$25.00 to the nearest \$1.00 minus 5 cents, and finally all prices over \$100.00 to the nearest \$10.00, minus 5 cents.*

In the example above, make sure that the default markup percentage set for treatments in this category is indeed 5%.

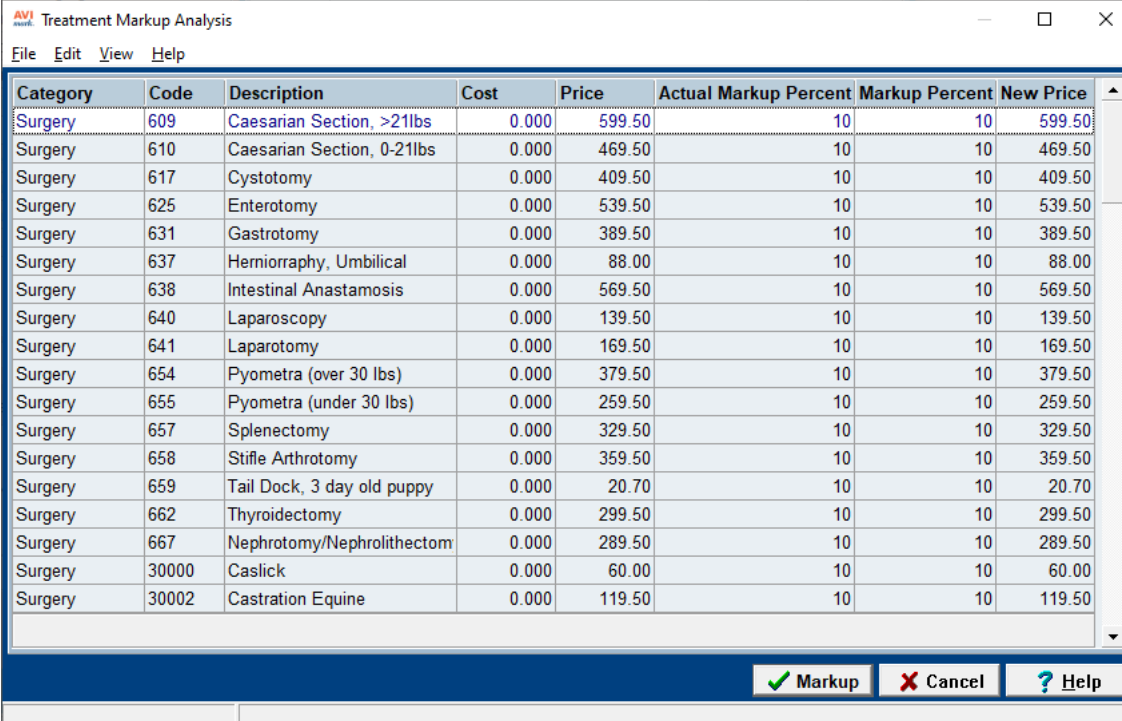
1. Double-click on the category line. The default category markup percentage will be displayed and may be changed, if necessary.
2. Go back to the Markup window. Notice that the markup specifications in the top half of the Markup window have already been set to the right values: **Increase Of This Category**.
3. Look at the bottom half of the display and click on the top line in the **If greater than** column. Specify 10.00 in this field and 0.10 in the **Round to** column.
4. On the middle line, specify 25.00 in the left column, 1.00 in the middle and 0.05 in the right column.
5. On the third line, specify 100.00 in the left field, 10.00 in the middle and 0.05 on the right.



# AVImark® Year-End Processes

## The Markup Analysis Window

You can review the proposed markup results before actually marking up your prices.



AVI Treatment Markup Analysis

File Edit View Help

Category	Code	Description	Cost	Price	Actual Markup Percent	Markup Percent	New Price
Surgery	609	Caesarian Section, >21lbs	0.000	599.50	10	10	599.50
Surgery	610	Caesarian Section, 0-21lbs	0.000	469.50	10	10	469.50
Surgery	617	Cystotomy	0.000	409.50	10	10	409.50
Surgery	625	Enterotomy	0.000	539.50	10	10	539.50
Surgery	631	Gastrotomy	0.000	389.50	10	10	389.50
Surgery	637	Herniorraphy, Umbilical	0.000	88.00	10	10	88.00
Surgery	638	Intestinal Anastamosis	0.000	569.50	10	10	569.50
Surgery	640	Laparoscopy	0.000	139.50	10	10	139.50
Surgery	641	Laparotomy	0.000	169.50	10	10	169.50
Surgery	654	Pyometra (over 30 lbs)	0.000	379.50	10	10	379.50
Surgery	655	Pyometra (under 30 lbs)	0.000	259.50	10	10	259.50
Surgery	657	Splenectomy	0.000	329.50	10	10	329.50
Surgery	658	Stifle Arthrotomy	0.000	359.50	10	10	359.50
Surgery	659	Tail Dock, 3 day old puppy	0.000	20.70	10	10	20.70
Surgery	662	Thyroidectomy	0.000	299.50	10	10	299.50
Surgery	667	Nephrotomy/Nephrolithectom	0.000	289.50	10	10	289.50
Surgery	30000	Caslick	0.000	60.00	10	10	60.00
Surgery	30002	Castration Equine	0.000	119.50	10	10	119.50

✓ Markup ✗ Cancel ? Help



It is always recommended that you 'review before markup' prior to doing a markup. Prices cannot be marked down. If you do a markup and are not satisfied with the results, the only options are to restore to a backup taken prior to the markup or manually adjust the prices.

- Make sure the Review before markup box is checked.



If you decide NOT to review the proposed markup, AVImark will give you one more chance to confirm your intentions. If you then click Done, AVImark will mark up prices as directed. Once prices are marked up, there is NO UNDO. The Markup Analysis window will open.

# AVImark<sup>®</sup> Year-End Processes

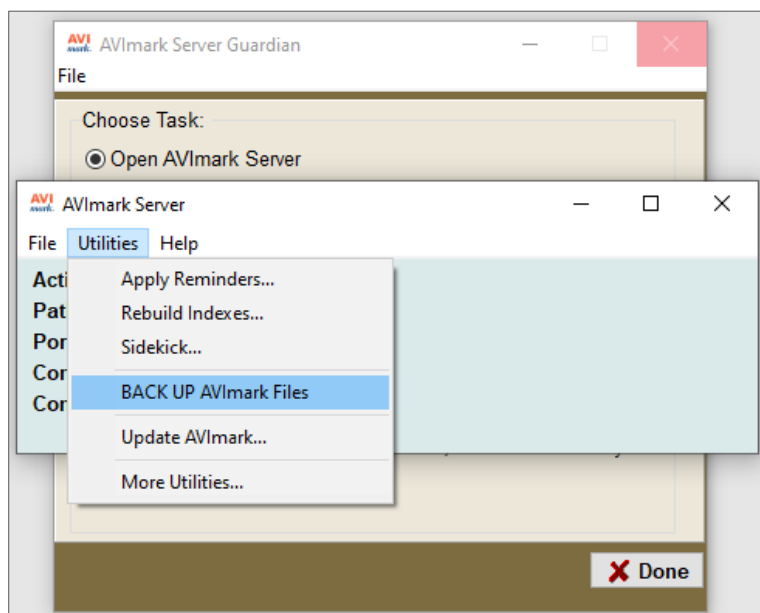
- If appropriate, make any changes to the marked-up prices by clicking the price in the **New Price** column and typing over the proposed price.
- Delete any treatment(s) in the list so those prices aren't marked up.
- Click in the **New Price** column on the list you don't want to mark up, then press **F4** to Remove.
- From the menu bar, click on **File > Print** to print an analysis report of the proposed markup, choose the printer then click **Print**.
- The report will show the old and proposed prices for each treatment, income from each treatment in the last 12 months and the amount of income that would have been produced according to the new proposed price levels. The increased income is totaled in the last column.
- If, after reviewing the proposed changes, you decide to indeed markup your prices, click **Markup**.

# AVImark® Year-End Processes

## End-of-Year Backup

Backing up is the activity of copying files so that they will be preserved in case of equipment failure or other catastrophe and should be made routine with the daily operations of the hospital.

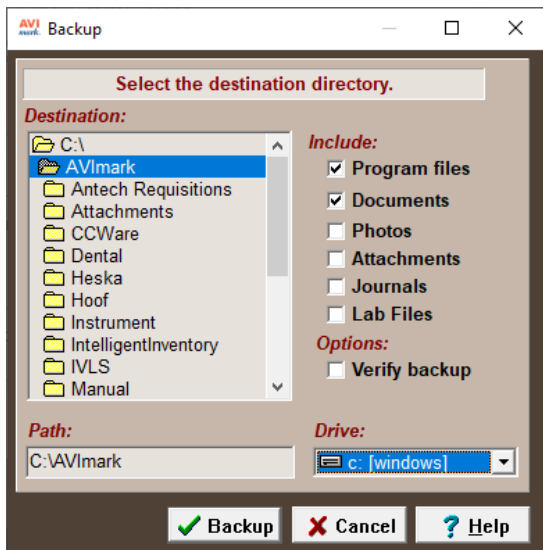
1. Be on the server with AVImark closed on all computers.
2. Locate the AVImark Guardian icon on the server computer Desktop.
3. **Right-click** on the **AVImark Guardian** and select **Run as Administrator**.
4. When the AVImark Guardian opens select the **Run** button.
5. In the AVImark Server window select **Utilities > Backup AVImark**.



6. In the AVImark Backup window, select at least program files and verify backup.
7. Include any other options you would like to also backup, such as, documents or attachments, etc.

# AVImark® Year-End Processes

8. Select the Drive and Destination you would like to backup to and click **Backup**.



9. When complete you will receive a message the backup is verified successfully.