



**VetWare**

Veterinary software for companion animals

## **Module 21**

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# **Parasiticide Campaign: Reminder Management and Result Measurement**



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## 1. Preparation of your campaign




Throughout this module, we will simulate the preparation of a promotional campaign to reach pet owners who need to treat their pets for heartworm and other parasites. We will call the campaign: « **Anti-parasite** ».

### 1.1 Creating an email template

Create your email template using our tool. (See module #35 – Email template tool)

## Email Template

NEW TEMPLATE

Name ▲	Language ▼	Last Update ▼	Actions
Anti Parasite	English	02/01/2026 12:08	  

If you subscribe to our online booking service, you can add a button to your email template to redirect your customers to your online booking platform.

Make an appointment

Your clients will then be able to make appointments without having to call the clinic, freeing up your phone lines, which are often busy during this period.

### 1.2 Creating an SMS template

If you subscribe to our SMS service, you can create your SMS template directly from your VetWare application. (See module 31, section 4.2 for editing SMS templates)

Animail
✕

Template name	Communication type	Media	Default	
Anti parasite campaign (email)	Reminder	Email	<input type="checkbox"/>	New
▶ Anti-parasite campaign (SMS)	Freeform message	SMS	<input type="checkbox"/>	Defaults...

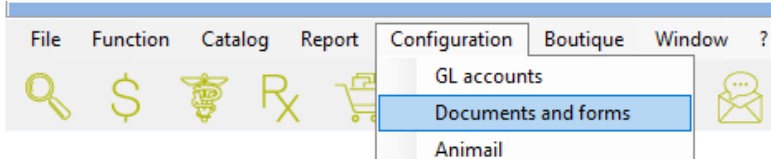
It will be important to use the « Freeform message » communication type for your SMS template.

Communication type: Freeform message ▼    Media: SMS ▼

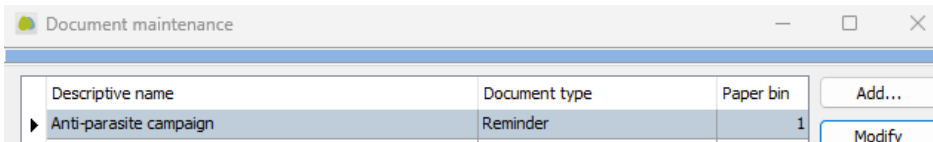
If you subscribe to our online booking service, you can add the URL link of your platform to your SMS template to redirect your customers to it, allowing them to book appointments without contacting the clinic by phone and thus freeing up your phone lines.

### 1.3 Creating a Form for mailing

Create your form using VetWare’s internal editor. (See module 13 for form creation)



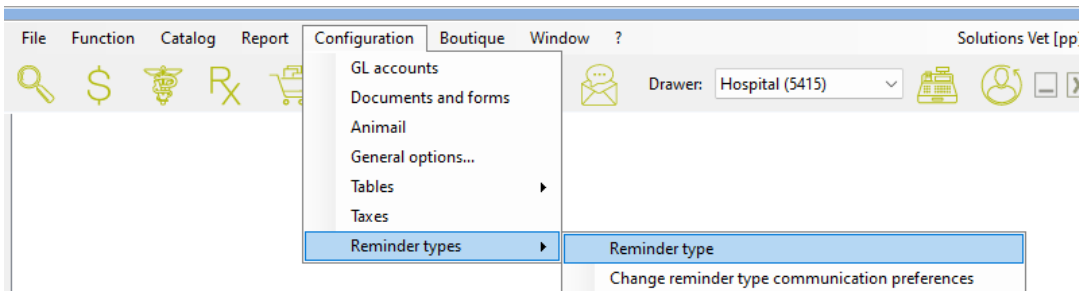
It will be important to use the « Reminder » document type for your form.



### 1.4 Creating a new reminder type called « Anti-parasite »

To prepare a promotional campaign for your customers, you need to create a new reminder type. This will make it easier to create your reminder batches.

Go to « Configuration » < « Reminder Types » < « Reminder Type ».



The « Reminder type maintenance » window will open.

Click the « Add » button.

In the « Description » section, enter the name of your reminder type in the « French » and « English » boxes, for example: « Antiparasitaire » and « Anti-Parasite ».



Then continue to define this new type of reminder by filling in the following fields:

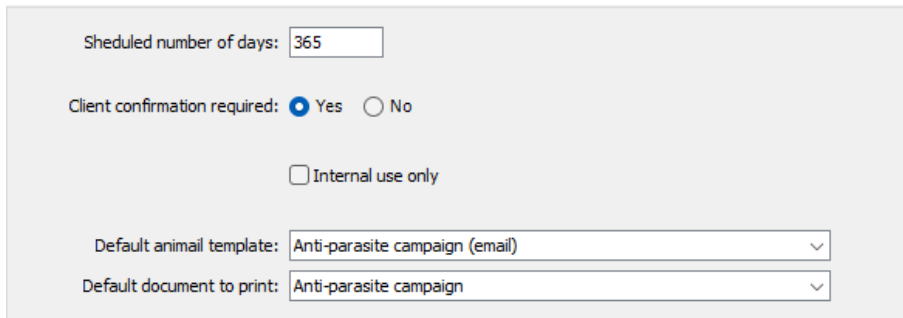
**Schedule number of days:** Indicate the default number of days for which this type of reminder should be sent.

**Client confirmation required:** Check « Yes » to allow you to track the progress of this type of reminder in the customer's file until a visit is open as such in the system.

**Internal use only:** Do not enable this option for your « Anti-Parasite » reminder type.

**Default Animapl template:** Select the name of the Animapl template you will use to send your email for this reminder type.

**Default document to print:** Select the name of the document template you will use to send your reminders by mail for this reminder type.



Scheduled number of days:

Client confirmation required:  Yes  No

Internal use only

Default animapl template:

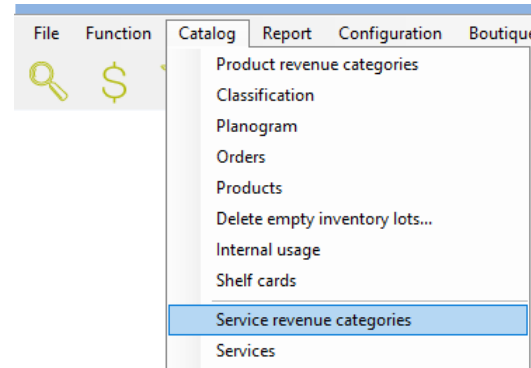
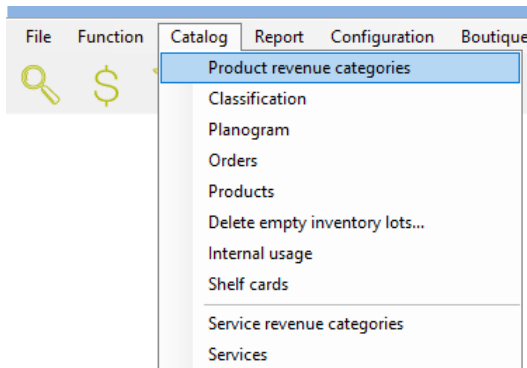
Default document to print:


## 1.5 Creating product and service categories associated with your campaign

To measure the performance of your campaign, it is important to categorize each of the products and services you sell. Sale summary and statistics reports are useful tools for interpreting and analyzing your results.

Here is how to create new categories:

Go to the « **Catalog** » < « **Product revenue categories** » or « **Service revenue categories** ».



Click on « Add » 

Enter a description in French and a description in English, then be sure to select the correct General Ledger code « GL Code ». Click on « Save »



Refer to sections 2 and 3 of Module 3 – Catalog if you would like more details about managing product and service categories.

## 1.6 Categorizing the products and services associated with your campaign

Link each product and service to the category associated with your promotional campaign.

Go to the « **Catalog** » < « **Products** ». Find the relevant product and select the desired « Revenue Category ».

Product description

French: Simparica 10mg violet 2.6-5kg /un

English: Simparica 10mg violet 2.6-5kg /un

Revenues category: **Anti-Parasite (products)**

Classification: Anti-parasite

Manufacturer: <N/A>

Planogram: <N/A>

Go to the « **Catalog** » < « **Services** ». Find the relevant service and select the desired « Revenue Category ».

Description

French: Snap 4Dx

English: Snap 4Dx

Invalid     Only for group

Include on cremation report

Category: **Anti-Parasite (services)**

**Important: when you change the category for existing products and services in your catalog, the sales history for the items concerned will be dated from the day you made the changes to the category.**

## 2. Creation of your reminders batch

There are two methods for extracting reminder batches:

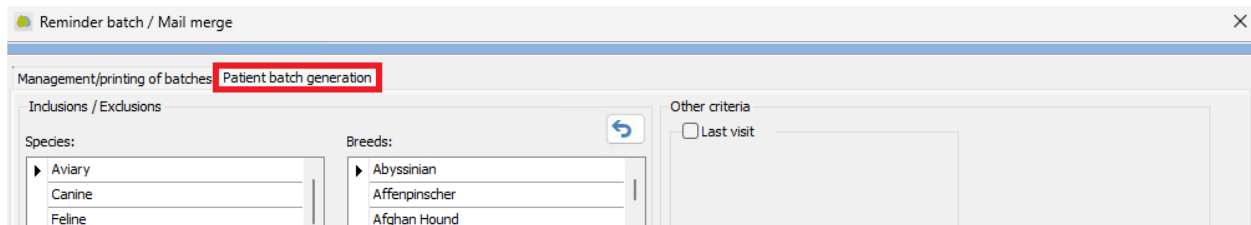
The first method consists of creating personalized reminder batches based on specific criteria and client's past purchases. You will have to choose from criteria such as species, age, gender, or product or service sold to patients.

The second method involves creating existing reminder batches, i.e., reminders that have been automatically added to your client's files. These reminders are added to the sale of specific services and/or products or have been manually added to your patients' files.

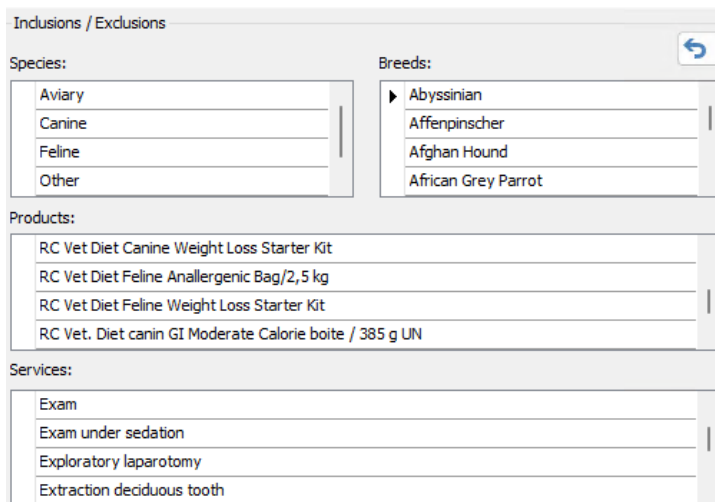
### 2.1 Method #1: Creating a personalized reminders batch

It is possible to create reminder batches based on criteria such as species, age, gender, or even the products or services sold to patients. This extraction method will allow you to reach a specific customer base as part of your « anti-parasite » campaign.

Go to « **Function** » < « **Reminder batches** », then click on the « **Patient batch generation** ».

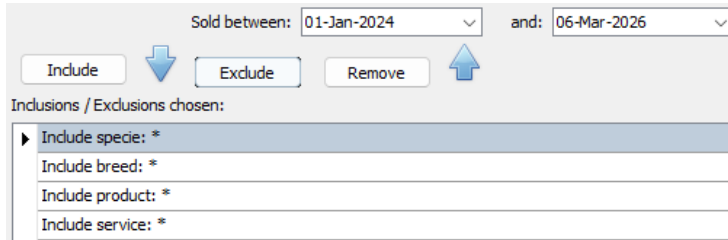


In the « Inclusions/Exclusions » section, you can select species, breeds, products, and services.



**PLEASE NOTE: If you select services and products, the patient must have received one of the selected services and one of the selected products in order to generate a reminder in their file.**

At the bottom, you will find a date selector labeled « Sold between » and « and » to search among your sales made during a specific period (by default, the system displays a range of the previous two years). The « Include », « Exclude » and « Remove » buttons are used to confirm your search criteria in the box below.



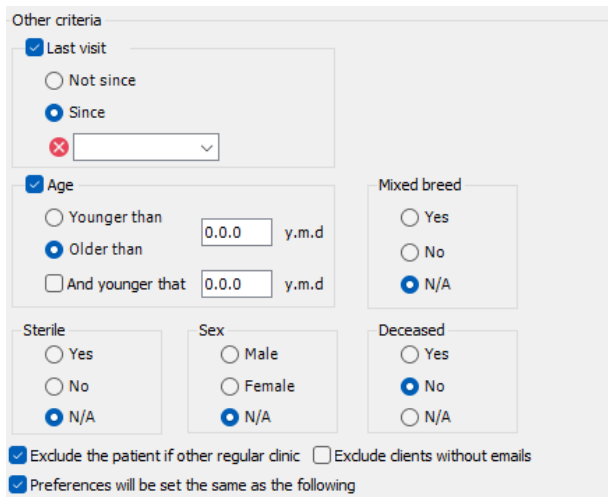
Sold between: 01-Jan-2024 and: 06-Mar-2026

Include Exclude Remove

Inclusions / Exclusions chosen:

- Include specie: \*
- Include breed: \*
- Include product: \*
- Include service: \*

Other criteria are listed on the right side of the window: « Last visit », « Age », « Mixed breed », « Sterile », « Sex » and « Deceased ».



Other criteria

Last visit

Not since

Since

[dropdown]

Age

Younger than [0.0.0] y.m.d

Older than [0.0.0] y.m.d

And younger than [0.0.0] y.m.d

Mixed breed

Yes

No

N/A

Sterile

Yes

No

N/A

Sex

Male

Female

N/A

Deceased

Yes

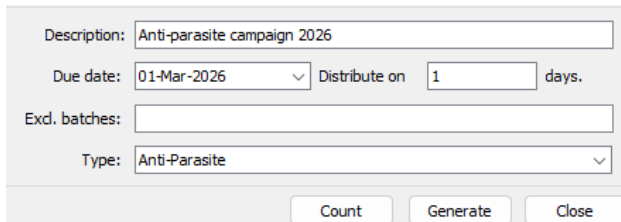
No

N/A

Exclude the patient if other regular clinic  Exclude clients without emails

Preferences will be set the same as the following

Once you have made all your selections for your reminders batch, enter a description for this reminders batch, select the date on which the reminder will be entered into your patients' files, then select the type of reminder to use.



Description: Anti-parasite campaign 2026

Due date: 01-Mar-2026 Distribute on 1 days.

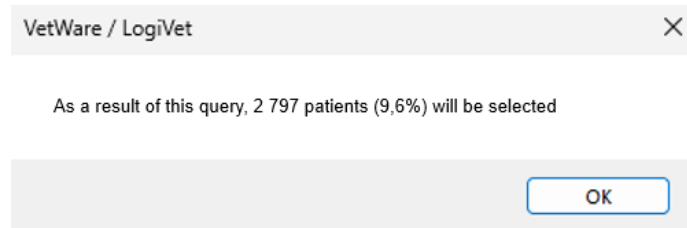
Excl. batches: [text box]

Type: Anti-Parasite

Count Generate Close



Click on the « Count » button to ensure that the number of reminders that will be generated based on your criteria makes sense for your establishment.

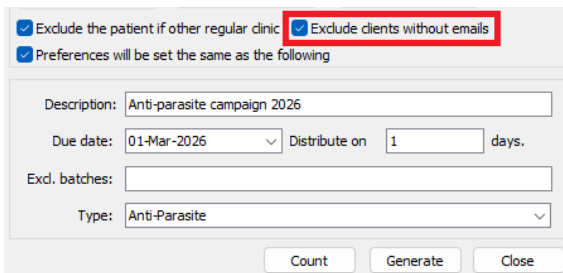


Then click on the « Generate » button to generate reminders in your patients' files. The number of your batch of reminders will then be displayed in the lower left corner of the window.

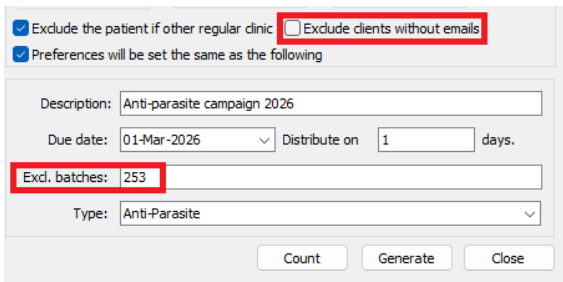
Generation completed: Batch no: 253 (Anti-parasite campaign 2026)

You can generate two separate batches. One for sending emails and the other for sending text messages/making phone calls/sending postal mail.

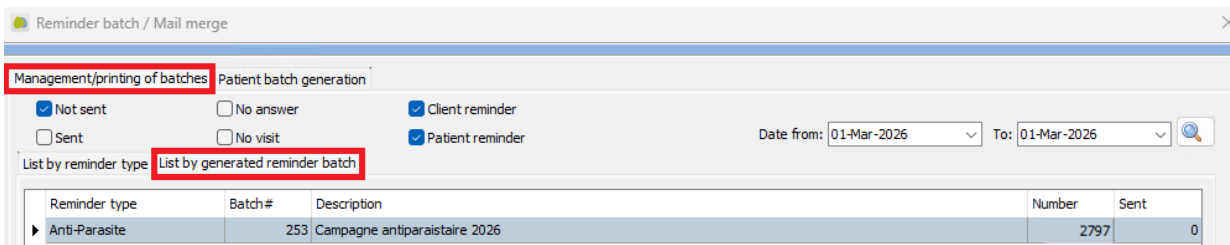
Step 1: Generate a first batch excluding customers without email addresses.



Step 2: Generate a second batch, excluding the batch generated in step 1.



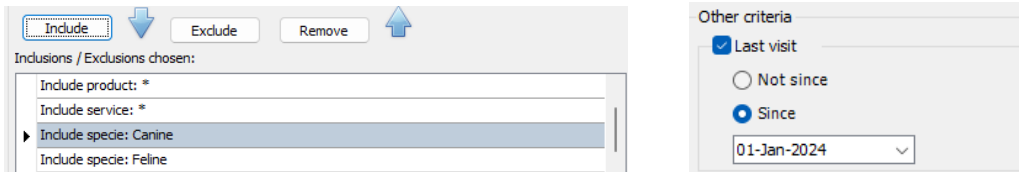
Once generated, your batch of reminders will be accessible under « Management/printing batches » > « List by generated reminder batch »



### 2.1.1 Scenario #1: Animals seen during a visit

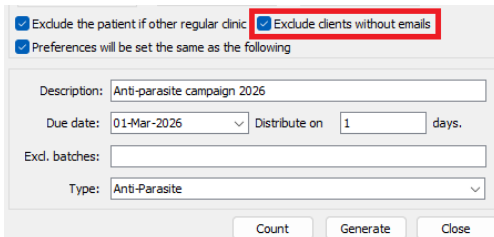
The simplest approach, which reaches a large portion of your client base, is to generate a reminder batch for all animals (dogs and cats) for whom you have recorded a visit, regardless of the reason for the visit, since a specific date.

Include the species « Canine » and/or « Feline », then select a date for the last visit under « Since »

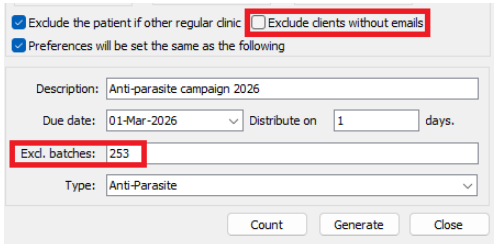


You can generate two separate batches. One for sending emails and the other for sending text messages/making phone calls/sending postal mail.

Step 1: Generate a first batch excluding customers without email addresses.



Step 2: Generate a second batch, excluding the batch generated in step 1.

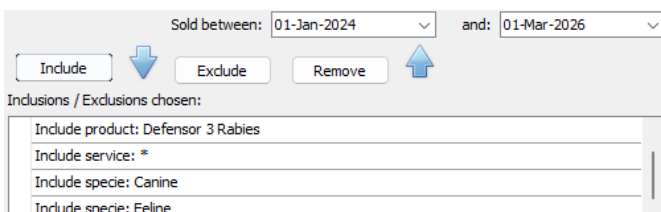


### 2.1.2 Scenario #2: Vaccinated animals only

You can generate a batch of reminders specifically for animals that received vaccinations during a given period.

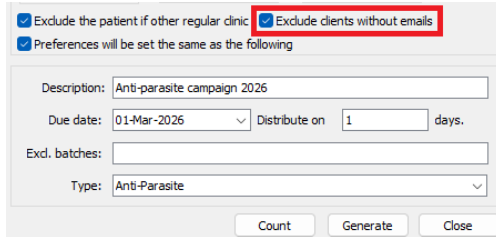
**\*\*\* Animals that did not receive a vaccination will be excluded from this batch \*\*\***

Select the « Canine » and/or « Feline » species, then choose the vaccination products from your product catalog, specifying the period for these sales.

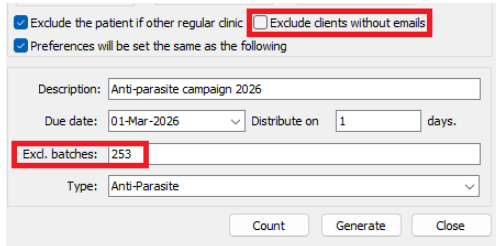


You can generate two separate batches. One for sending emails and the other for sending text messages/making phone calls/sending postal mail.

Step 1: Generate a first batch excluding customers without email addresses.



Step 2: Generate a second batch, excluding the batch generated in step 1.

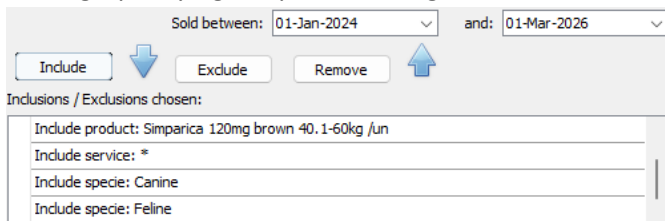


### 2.1.3 Scenario #3: Purchase of anti-parasite products only

You can generate a batch of reminders only for animals that have purchased anti-parasite products during a specific period.

\*\*\* Animals seen during a visit, but who did not receive anti-parasite product will be excluded from this batch \*\*\*

Include the species « Canine » and/or « Feline », then the parasite control products from your product catalog, specifying the period during which these sales occurred.



You can generate two separate batches. One for sending emails and the other for sending text messages/making phone calls/sending postal mail.

Step 1: Generate a first batch excluding customers without email addresses.

Step 2: Generate a second batch, excluding the batch generated in step 1.

### 2.1.4 Scenario #4: Vaccinated animals and the purchase of anti-parasite products

You can generate a batch of reminders only for animals that have purchased anti-parasite products and/or been vaccinated during a specific period.

\*\*\* Animals seen during a visit, but who did not receive a parasite treatment and/or vaccination will be excluded from this batch \*\*\*

Include the species « Canine » and/or « Feline », then the vaccination products and anti-parasite products from your product catalog, specifying the period during which these sales occurred.

You can generate two separate batches. One for sending emails and the other for sending text messages/making phone calls/sending postal mail.

Step 1: Generate a first batch excluding customers without email addresses.

Step 2: Generate a second batch, excluding the batch generated in step 1.

### 2.1.5 Scenario #5: Puppies and Kittens

To ensure you do not forget about puppies and kittens that have not yet been vaccinated and/or had their anti-parasite products purchased, you can generate a batch of reminders specifically for them.

First, generate your initial batch of reminders (one of the first four scenarios).

Next, generate your batch of reminders for puppies and kittens.

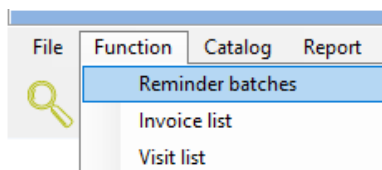
Include the species « Canine » and/or « Feline », then select the age “Younger than” (e.g., 6 months)

Since some puppies and kittens may appear in your first batch of reminders (one of the first four scenarios), exclude them when you generate your batch of puppy and kitten reminders. This will prevent you from having the same puppy or kitten in two different batches.

## 2.2 Method #2: Creating a batch of reminders already on file

To extract existing reminder batches from your system:

Go to the « Function » > « Reminder Batches »



The « Reminder batch/Mailing merge » window will open. By default, you will be on the « Management/Printing of batches » tab.



Select a date range by filling in the « Due Date » and « To » fields, for example, June 1<sup>st</sup>, 2025 and August 31<sup>st</sup>, 2025. Click the magnifying glass to perform your search.

The batches will be displayed by reminder type. In this example, we have two types of reminders for this date range: the « Anti-Parasite » batch and the « Clinic courtesy » batch.

List by reminder type | List by generated reminder batch

Reminder type	Batches	Number	Sent
▶ Anti-Parasite	1	862	0
Clinic courtesy	1	2	0

### 3. Sending reminders

Your software offers many ways to reach your clients. Some prefer the traditional method of the **phone**, while others will send reminder cards or personalized letters by **mail**. Veterinary practices that have collected email addresses and obtained their clients consent can send reminders or invitations via their **email** application using the various « Animail » templates. Clinics subscribed to VetWare’s SMS service can send **text messages**.

To reach and convince as many pet owners as possible, it is recommended to combine different methods, for example:

- Attempt #1: Email; Attempt #2: Phone calls
- Attempt #1: Email; Attempt #2: SMS; Attempt #3: Phone calls
- Attempt #1: Email; Attempt #2: Postcards; Attempt #3: Phone calls
- Attempt #1: Postcards; Attempt #2: Phone calls
- Etc.

Please note that your software allows you to specify for each of your clients how they would like to be notified for different types of reminders. For more information on this topic, please refer to Module 17 – Communication Preferences.

### 3.1 Grouping and splitting of reminders

Before sending your batch of reminders via email, printing them, or exporting them as a file, you can group or split your reminders using any of the following methods:

Group reminders for a client       Split by languages  
 Group reminders for a patient       Split by species, languages

Group reminders for a client: If you want to group reminders for clients who have more than one pet, a single email will be sent, and a single letter or postcard will be printed.

Group reminders by pet: If you want to group reminders for pets that have multiple reminders of the same type, this option ensures that only one reminder is printed per pet.

Split by languages: (option checked by default) Reminders will be divided into two groups based on the clients' language, one batch for your French-speaking clients and one batch for your English-speaking clients.

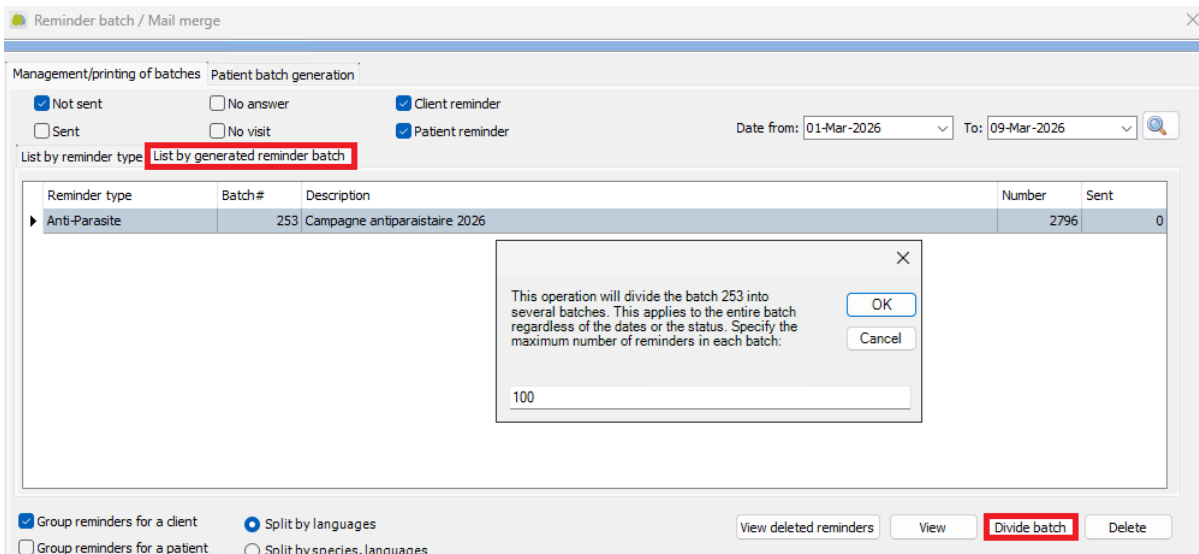
Split by species and languages: Reminders will be divided into groups based on the species and language of the clients, for example, English Canine, French Canine, English Feline, etc.

### 3.2 Sending by email

To send email reminders using your software, you must first configure the email sending settings within your software. (See Module 31 - Email)

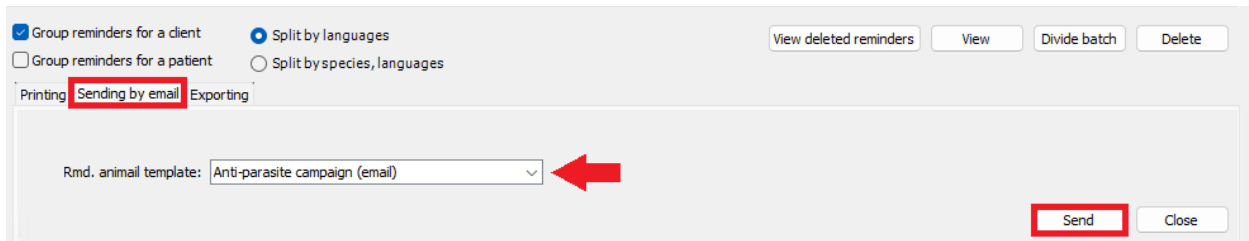
To avoid overloading your email provider's SMTP server, we recommend splitting your batch of reminders to ensure you do not send more emails than your provider allows.

Select your batch of reminders and click the « Divide batch » button, then specify the maximum number of reminders to include in each of the new batches.



In summary, once your batch has been divided, follow these steps to send email reminders:

- Select your reminder batch, then click « Send by email ».
- Select your grouping and splitting options
- Choose the desired « Animate reminder template »
- Click the « Send » button at the bottom of the screen

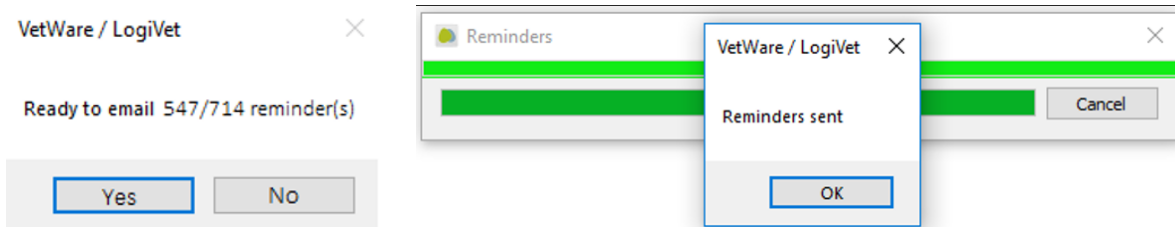


Send a batch of reminders every 2-3 days to avoid sending more emails than your provider allows. Allow few weeks (depending on the number of reminders you have) to send all your reminders via email.

This will also allow you to monitor your customers' response rates by leaving a 2-3 days interval between each mailing.

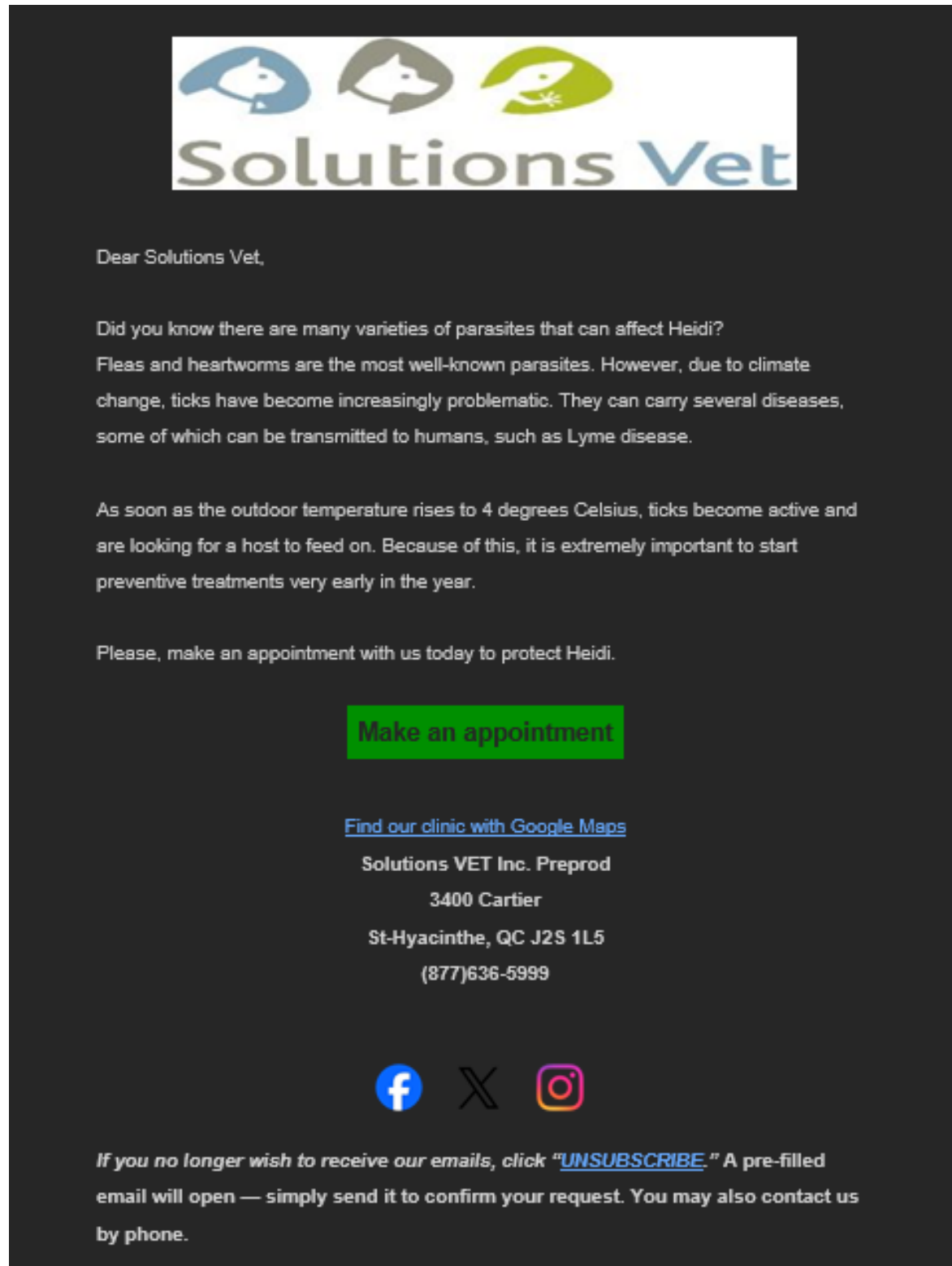
A new window will open showing the number of reminders that will be sent via email. In the example below, 547 out of 714 reminders can be sent via email.

Click « Yes ». A window indicating that the reminders are being sent will open.






Example of an email message received by one of your affected customers.

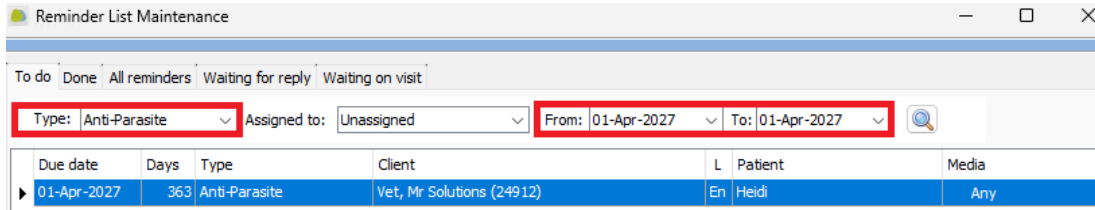


### 3.3 Sending via SMS

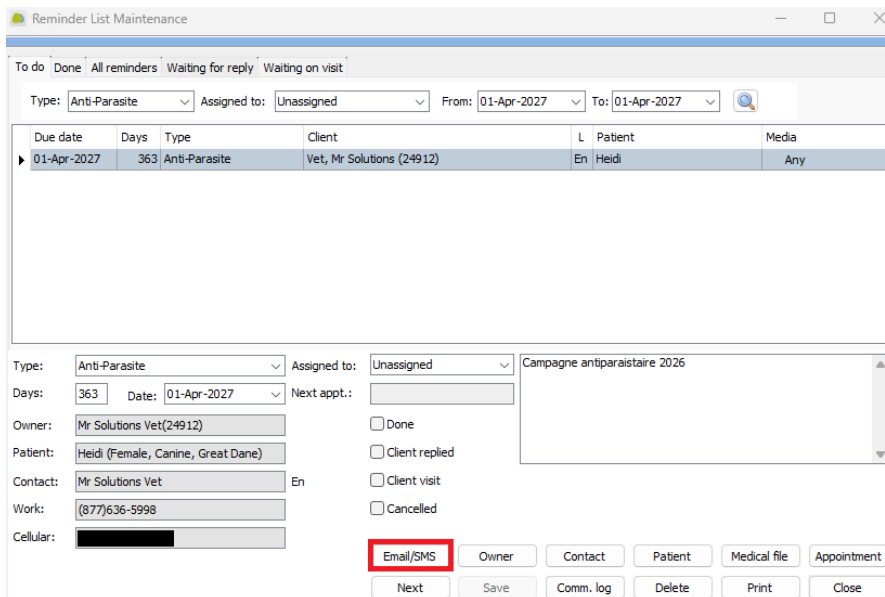
\*\*\* You must be subscribed to VetWare’s SMS service \*\*\*

VetWare does not support bulk sending of reminders (reminder batches) via SMS. However, you can send individual reminders via SMS from the « Reminder List Maintenance » window .

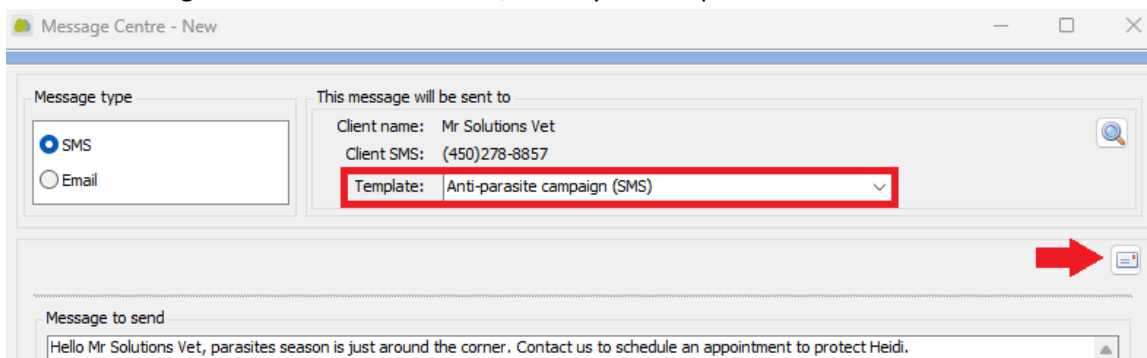
Select your reminder type and the period to view your « Anti-parasite » reminders.



Select a reminder, then click the « Email/SMS » button



In the « Message Center – New » window, select your template and send it



Once the text message has been sent, mark the reminder as « Done », and you can also add a note to the reminder indicating that the text message has been sent.

Type: Anti-Parasite Assigned to: Unassigned 2026/03/15 : SMS sent

Days: 363 Date: 01-Apr-2027 Next appt.:

Owner: Mr Solutions Vet(24912)  Done

Patient: Heidi (Female, Canine, Great Dane)  Client replied

Contact: Mr Solutions Vet En  Client visit

Work: (877)636-5998  Cancelled

Cellular:

### 3.4 Sending reminders by mail (mail merge)

Various types of documents can be used to contact your clients, such as personalized letters, reminder cards, address labels, and others. Depending on how your clinic’s software is configured, all these templates can be created using the software’s internal editor and linked to a specific type of reminder. (See Module 13 for creating forms)

For all types of reminders, the method for printing direct mail documents or address labels is the same:

- Search for and select the reminder batch to be sent;
- Choose a grouping and/or splitting option;
- Click the « Printing » tab;
- Select the name of the desired document template;
- Select a sorting option (Optional).
- Select the printer to use

Reminder batch / Mail merge

Management/printing of batches Patient batch generation

Not sent  No answer  Client reminder

Sent  No visit  Patient reminder

Date from: 01-Mar-2026 To: 01-Mar-2026

List by reminder type List by generated reminder batch

Reminder type	Batches	Number	Sent
▶ Anti-Parasite	1	2796	0

Group reminders for a client  Split by languages

Group reminders for a patient  Split by species, languages

View deleted reminders View Divide batch Delete

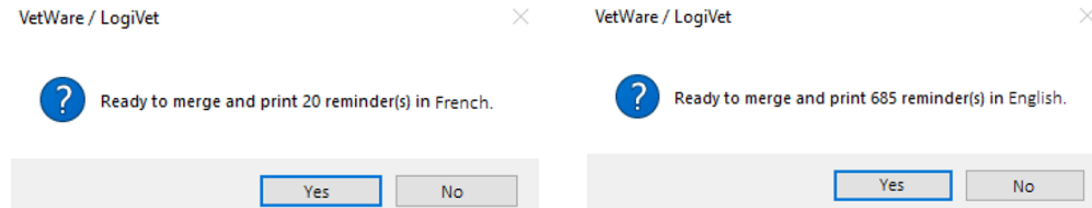
**Printing** Sending by email Exporting

Document: Anti-parasite campaign Start at (last name):

Sorted by: Client name, patient name

Printer: Microsoft Print to PDF (redirection de 4) **Print** Close

If your batch includes both English and French customers, the printing will be done in two separate steps



Example of a printed document:

Solutions VET Inc. Staging  
 3400 Cartier  
 St-Hyacinthe, QC, J2S 1L5  
**(877)636-5999**

Spring is around the corner. And with it will come the mosquitoes that may be carrying canine heartworm disease into our neighborhood through the summer. Treatment of the disease can be dangerous and costly. Prevention is the answer and it's so easy. After a simple blood test, preventive medicine can be prescribed to keep this disease from affecting your dog **Heidi**.

Mr SolutionsVet  
 3400, Cartier  
 St-Hyacinthe, QC J2S 1L5

*Please call for an appointment*

### 3.5 Exporting a Batch of Reminder in a File format

You can export the contact information of patients due for a follow-up visit as an Excel or text file. This type of file is required, among other things, to send postcards and/or emails through a third-party provider outside of VetWare.

- Search for and select the reminders batch to export;
- Choose a grouping and/or splitting option;
- Click the « Export » tab;

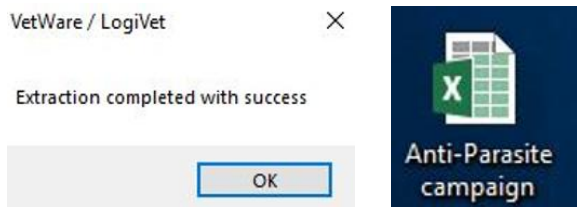


Select the desired file type, « Excel format » or « Text format ».

Check or uncheck « Change the status to: Sent ».

When this box is checked, the status of reminders for the affected clients will display as « Sent » after exporting this batch, and the reminder status will be set to « Done » in your patients' files.

Click the « Export » button, and you'll see a message at the bottom of the window confirming that the export was successful. Your file, ready to use, will appear in the location you previously chose to save it.



Your reminders will be listed under different tabs in the same file; for example, in this case, the « English » and « French » tabs.

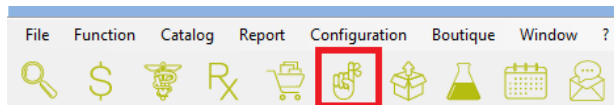
A	B	C	D	E	F	G	H	I	J	K
Titre	Prénom	Nom	Adresse	AdresseAutre	Ville	Province	CodePostal	Courriel	NomAnimal	MessageRappel
Mme	Yvette	Adam	349, 161ème Avenue		Magog	QC	J1X 3B6		Angel	N/A
Mme	Vicky	Anctil	4889 A, Grimard		Sherbrooke	QC	J1N 2G9		Alfred	N/A
Mme	Véronique	Astruc	276, des pinsons		Magog	QC	J1X 0M9		Aramis	N/A
Mme	Véronique	Aubé	4387, de vega				J1M 1Z5		Akita	N/A

French English

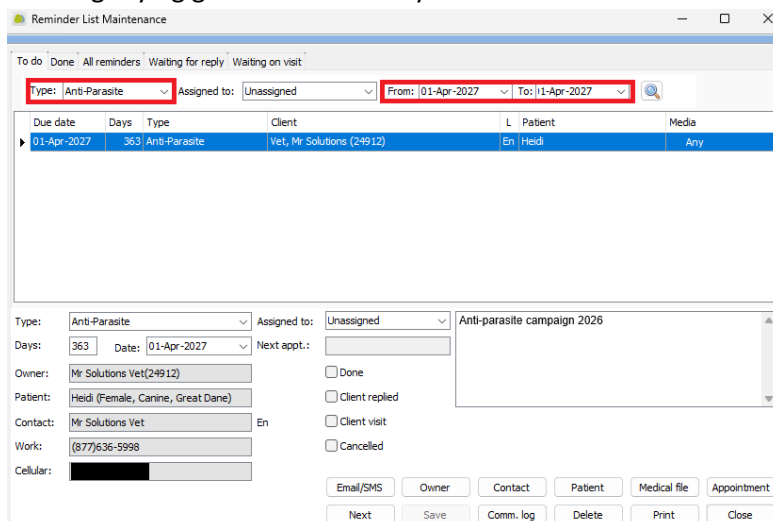
### 3.6 Follow-up calls

Before making follow-up calls, we recommend sending emails and text messages first. The larger your database of email and/or text message contacts, the less time you'll need to spend calling your customers. Your staff can then use the time saved to focus on other tasks.

The best way to make follow-up calls is to use the « Reminder List » tool.



On the « To Do » tab, select the « Type » and « Assigned to », and specify the desired date range. Tap the magnifying glass to search for your reminders.



Reminders sent via email and/or text message will have been moved to the « Done » tab. You can then go through all the reminders (that were not sent via email and/or text message) one by one and contact the owners by phone.

The contact information displayed at the bottom saves you from having to go back into the files. You can change the status of these reminders by checking the boxes:

- « Done » if you were able to speak with the client or leave a message for them or on their voicemail
- « Client replied » if the appointment was scheduled during your call.
- « Cancelled » if the client told you they did not want to schedule an appointment

If the client has an upcoming appointment, the date will be displayed on the screen.

Type: Anti-Parasite Assigned to: Unassigned  
 Days: 363 Date: 01-Apr-2027 Next appt.: 14-Apr-2026 10:00 AM  
 Owner: Mr Solutions Vet(24912)  
 Patient: Heidi (Female, Canine, Great Dane)  
 Contact: Mr Solutions Vet En  
 Work: (877)636-5998  
 Cellular: [Redacted]

Done  
 Client replied  
 Client visit  
 Cancelled

Email/SMS Owner Contact Patient Medical file **Appointment**  
 Save / Next Save Comm. log Delete Print Close

Click the « Appointment » button to check the reason for the appointment.

Date	Time	Patient	Resource	Reason	Notes	Completed	Cancelled
14-Apr-2026	10:00	Heidi	Dr John Dolittle	<N/A>	Vaccination + Anti-pa...		

If this is their anti-parasite appointment, you can set the reminder status to « Client replied », indicating that the customer has scheduled their appointment for this reminder.

Type: Anti-Parasite Assigned to: Unassigned  
 Days: 363 Date: 01-Apr-2027 Next appt.: 14-Apr-2026 10:00 AM  
 Owner: Mr Solutions Vet(24912)  
 Patient: Heidi (Female, Canine, Great Dane)  
 Contact: Mr Solutions Vet En  
 Work: (877)636-5998  
 Cellular: [Redacted]

Done  
 Client replied  
 Client visit  
 Cancelled

Email/SMS Owner Contact Patient Medical file **Appointment**  
 Save / Next Save Comm. log Delete Print Close



You can also add a note to the reminder to indicate that you left a message, that the customer will call you back to schedule an appointment, or that you were unable to speak to anyone or leave a message.

Type: Anti-Parasite Assigned to: Unassigned  
 Days: 363 Date: 01-Apr-2027 Next appt.: 14-Apr-2026 10:00 AM  
 Owner: Mr Solutions Vet(24912)  
 Patient: Heidi (Female, Canine, Great Dane)  
 Contact: Mr Solutions Vet En  
 Work: (877)636-5998  
 Cellular: [Redacted]

Done  
 Client replied  
 Client visit  
 Cancelled

Buttons: Email/SMS, Owner, Contact, Patient, Medical file, Appointment, Save / Next, Save, Comm. log, Delete, Print, Close

Note: Anti-parasite campaign 2026 2026/03/23 : Left message on voicemail

For more information on how to use « Reminder List Maintenance », see Section 3.2 of Module 2 – Reminders and vaccination schedules.

### 3.7 Second Communication

To maximize your response rate, you may want to send a second reminder to customers who still have not scheduled an appointment after receiving the first reminder.

This second reminder can be sent one month after the first reminder was sent. In the « Reminder List Maintenance » window, go to the « **Waiting for reply** » tab, then select the reminder type and the period (the date on which you generated your batch of reminders).

If the client has an upcoming appointment, the date of that appointment will be displayed on the screen.

Type: Anti-Parasite Assigned to: Unassigned  
 Days: 363 Date: 01-Apr-2027 Next appt.: 14-Apr-2026 10:00 AM  
 Owner: Mr Solutions Vet(24912)  
 Patient: Heidi (Female, Canine, Great Dane)  
 Contact: Mr Solutions Vet En  
 Work: (877)636-5998  
 Cellular: [Redacted]

Done  
 Client replied  
 Client visit  
 Cancelled

Buttons: Email/SMS, Owner, Contact, Patient, Medical file, Appointment, Save / Next, Save, Comm. log, Delete, Print, Close

Note: Anti-parasite campaign 2026 2026/03/23 : Left message on voicemail

Click the « Appointment » button to check the reason for the appointment.

Appointment List - Vet, Mr Solutions (24912) - Solutions VET Inc. Staging

Date	Time	Patient	Resource	Reason	Notes	Completed	Cancelled
14-Apr-2026	10:00	Heidi	Dr John Dolittle	<N/A>	Vaccination + Anti-pa...		

If this is their anti-parasite appointment, you can set the reminder status to « Client replied », indicating that the customer has scheduled their appointment for this reminder.

You can also add a note to the reminder to indicate that you left a message, that the customer will call you back to schedule an appointment, or that you were unable to speak to anyone or leave a message.

If the client does not have an upcoming appointment scheduled for their pet’s parasite treatment, you can proceed with your second follow-up. We recommend using a different method of communication than the one used during the first follow-up. Ideally, opt for a phone call or a text message.

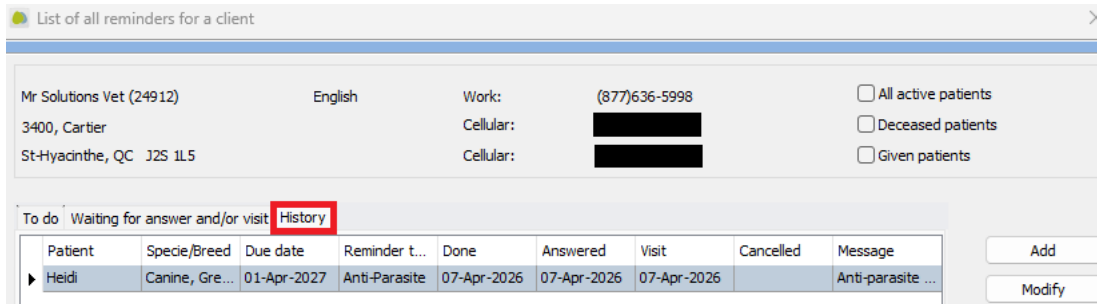
## 4. Response to a reminder

By default, in the « Visit creation » window, you will see all your reminders listed under the « Reminder response » section.

Due date	Done date	Reminder type	Description
01-Apr-2027		Anti-Parasite	Anti-parasite campaign 2026

As your customers arrive at your establishment, CHECK the box next to the reminder when you start the visit.

The reminder will be marked as completed and will appear in the customer's reminder history.

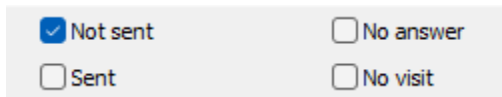


## 5. Measuring Your Campaign's Success Rate

To assess the success rate of your anti-parasite campaign and make adjustments for future campaigns, we recommend using the « Reminder List Maintenance » tool.

In addition, the various reports available in your software will be useful and will provide you with performance metrics.

### 5.1 Calculate the response rate using the « Reminder Batch Management » tool



Not sent       No answer  
 Sent               No visit

These options allow you to select specific reminder statuses before searching through them. They are also useful for evaluating the response rate of your reminders during and after a campaign.

Not sent: all reminders that have not been sent or completed (not done) will be selected.

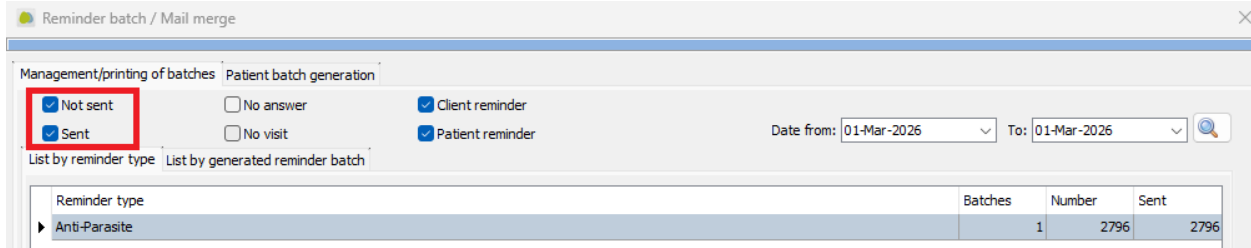
Sent: all reminders that have already been sent or marked as completed will be selected.

No response: all reminders for which you have not received a response (the client has not scheduled an appointment) will be selected.

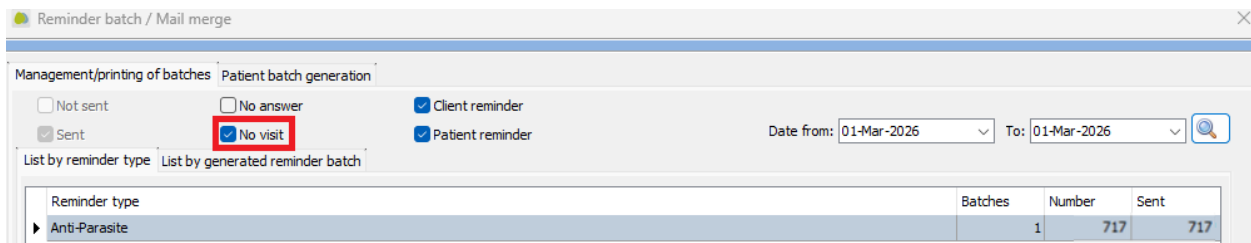
No visit: all reminders for which you did not receive a visit will be selected.

After checking the « Not sent » and « Sent » boxes and selecting the date range for your anti-parasite campaign, perform a search using the magnifying glass.

In our example, we get a result of 2,796 « Anti-parasite » reminders sent



If you run another search using the same date range but select « No visits », the tool returns 717 reminders.



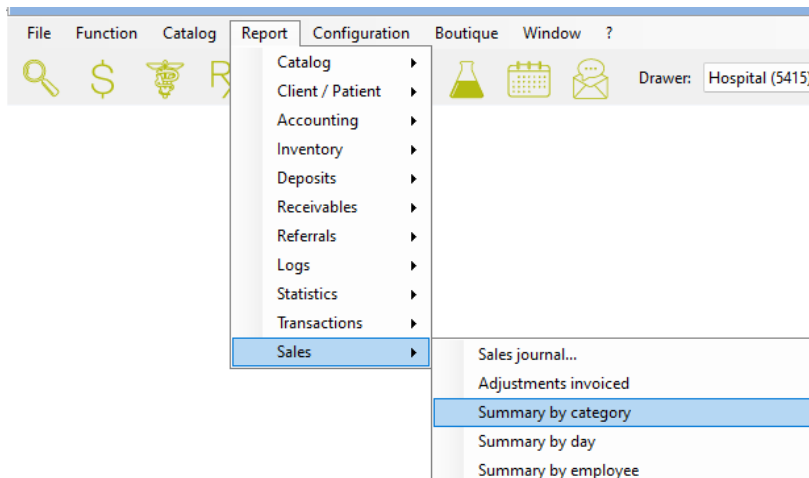
We can therefore conclude that, to date, 717 of the 2,796 reminders initially sent out have not resulted in a patient visit, representing approximately 25.64% of reminders that have gone unanswered.

Based on this result, you can decide whether to make another attempt to contact these individuals to encourage them to come in for a visit.

## 5.2 Reports: Sales Statistics

As mentioned earlier, various summary and detailed reports can help you track your sales from your anti-parasite campaign, provided your products and services are properly categorized.

Go to « Reports » > « Sales » > « Summary by Category » or similar.



Select a date range, specifically the period during which your anti-parasite campaign took place.

Report parameters - Summary by category

Printer: OneNote (Desktop) (redirection de 2) [Preview]

Establishment: Solutions VET Inc. Staging [Print]

Period and dates

Last year

Current year

Last month

Current month

Last quarter

Last 12 months

Last 12 full months

From: 01-Mar-2026

To: 30-Nov-2026

Number of prior periods to produce: 0

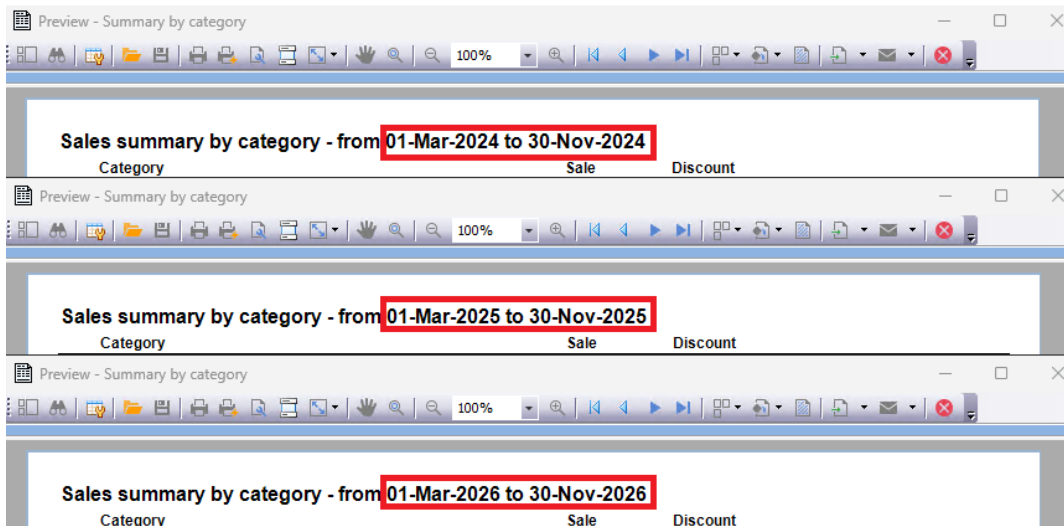
Keep the window opened:

[Cancel]

To compare sales from one period to another, you can specify the number of additional prior periods to include.

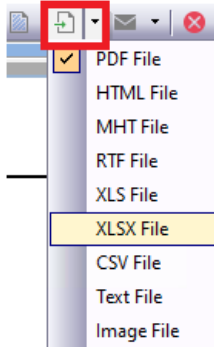
Number of prior periods to produce: 2

For example, if you enter two here, the desired report will also be displayed for the same dates in the two previous years.



In addition to printing these reports as needed, please note that you can export them in various formats, such as PDF, Excel, Word, etc.

Click the small « Export Document » icon in the upper-right corner. Select the desired format and save it to the folder of your choice.



For more information on sales reports and statistics, please refer to Module 8 – Reports.