

Advanced Search

22/10/2024 9:26 am BST

Summary

The Advanced Search feature is used to find clients and patients by information such as invoice number, dispensed product name and treatment date. Entering the criteria and running the search will load all known clients with matching criteria.

Details

Using Advanced Search

1. Navigate to **Reception**.
2. Select the '**Advanced Search**' tab.
3. Specify the search criteria using any combination of the following areas:

The screenshot shows the 'Advanced Search' tab selected in a software interface. The interface is divided into several sections for inputting search criteria:

- Treatment**: Includes a dropdown for 'Treatment' (set to 'All'), a text field for 'Clinical', and a text field for 'Invoice'. Below these are radio buttons for 'Invoice Date' (selected), 'Item Date', and 'No Date'. There are also 'Date From' (15/10/2024) and 'Date To' (22/10/2024) fields with calendar icons.
- Client Notes**: A large text area for entering notes.
- Patient**: Includes dropdowns for 'Species' and 'Breed'. It also has text fields for 'Default Name', 'Additional Name 1' through 'Additional Name 4', 'Yard Name', 'Yard Town', 'Yard Postcode', 'Policy Number', and 'Insurance Company'.
- Account Categories**: A section with a checkbox for 'Account Category Search'. Below it is a list of categories: 'Banned Client', 'Cash Only', 'General', 'Insurance Claims', and 'Is a Bad Debtor'. There are navigation arrows and a search input field next to this list.

At the bottom left, there are 'Clear' and 'Search' buttons, and a checkbox labeled 'Excludes Euthanasia'.

Treatment

The following can be searched by Invoice Date/Item Date/No date.

Treatment = Treatment Item.

Clinical = Clinical Notes.

Invoice = Invoice Number.

Client Notes

Search by Notes stored against Client's record.

Patient

Species = Patient's registered species.

Breed = Patient's registered breed.

Default Name = Patient Name.

Additional Name 1 = Additional Name registered in Patient Details.

Additional Name 2 = Additional Name registered in Patient Details.

Additional Name 3 = Additional Name registered in Patient Details.

Additional Name 4 = Additional Name registered in Patient Details.

Yard Name = Yard name registered in Patient Details.

Yard Town = Yard town registered in Patient Details.

Yard Postcode = Yard Postcode registered in Patient Details.

Policy Number = Insurance Policy number.

Insurance Company = Patient's registered Insurance Company.

Account Categories

Use the arrows to select and move the Account Categories you want to search by.
