

# Email from Report Wizard

23/10/2024 4:26 pm BST

## Summary

The Report Wizard tab can be accessed via the top menu by selecting Utilities > Reports and then selecting the Report Wizard Tab.

The Report Wizard screen is used to collate data from specified criteria. This data can then be exported to a spreadsheet, or used to communicate with registered clients.

For example, it could be an upcoming annual event such as Bonfire Night, and you may wish to send out a letter to all clients registered with some handy tips to reduce stress.

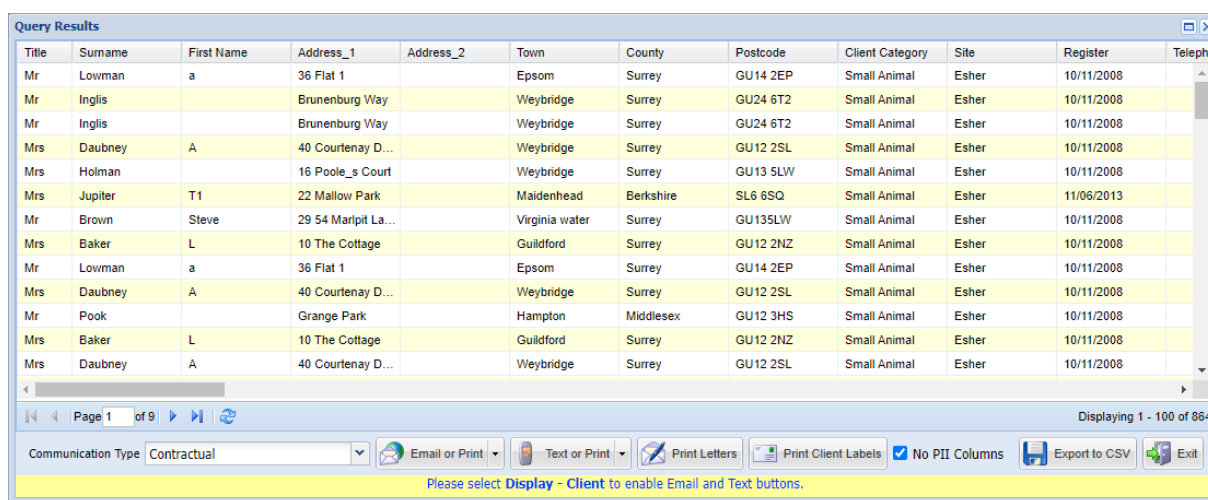
The clients who meet specified criteria can then be contacted by SMS and Email.

For further information see the [Report Wizard](#) page.

## Details

### Send Emails from Report Wizard

1. Once the report has been run, and your criteria results are displayed:



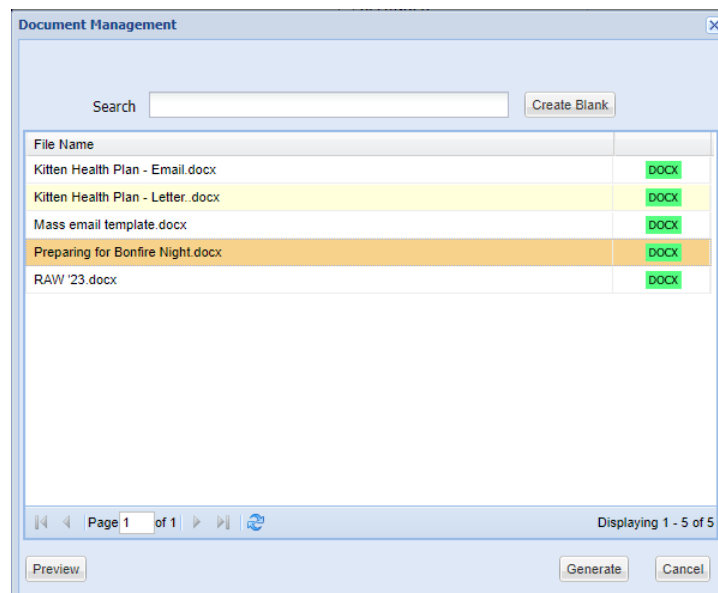
Title	Surname	First Name	Address_1	Address_2	Town	County	Postcode	Client Category	Site	Register	Telephone
Mr	Lowman	a	36 Flat 1		Epsom	Surrey	GU14 2EP	Small Animal	Esher	10/11/2008	
Mr	Inglis		Brunenburg Way		Weybridge	Surrey	GU24 6T2	Small Animal	Esher	10/11/2008	
Mr	Inglis		Brunenburg Way		Weybridge	Surrey	GU24 6T2	Small Animal	Esher	10/11/2008	
Mrs	Daubney	A	40 Courtenay D...		Weybridge	Surrey	GU12 2SL	Small Animal	Esher	10/11/2008	
Mrs	Holman		16 Poole_s Court		Weybridge	Surrey	GU13 5LW	Small Animal	Esher	10/11/2008	
Mrs	Jupiter	T1	22 Mallow Park		Maidenhead	Berkshire	SL6 6SQ	Small Animal	Esher	11/06/2013	
Mr	Brown	Steve	29 54 Marpit La...		Virginia water	Surrey	GU13 5LW	Small Animal	Esher	10/11/2008	
Mrs	Baker	L	10 The Cottage		Guildford	Surrey	GU12 2NZ	Small Animal	Esher	10/11/2008	
Mr	Lowman	a	36 Flat 1		Epsom	Surrey	GU14 2EP	Small Animal	Esher	10/11/2008	
Mrs	Daubney	A	40 Courtenay D...		Weybridge	Surrey	GU12 2SL	Small Animal	Esher	10/11/2008	
Mr	Pook		Grange Park		Hampton	Middlesex	GU12 3HS	Small Animal	Esher	10/11/2008	
Mrs	Baker	L	10 The Cottage		Guildford	Surrey	GU12 2NZ	Small Animal	Esher	10/11/2008	
Mrs	Daubney	A	40 Courtenay D...		Weybridge	Surrey	GU12 2SL	Small Animal	Esher	10/11/2008	

2. Select the arrow next to '**Email or Print**'.

**Email Only** = Send email to all clients with a registered email, ignoring all clients with no email address registered.

**Email & Generate Letter for Missing** = For clients with no registered email, generate a document to print and post out.

3. After selecting an option, the below window will appear. Select the template required and select '**Generate**'.



**Note: As soon as the user clicks 'Generate', the communication being sent will begin.**

4. The document will then emailed to all eligible clients and an audit trail will be stored in their Communication Tab in the Reception screen.

