Client Libraries

24/10/2024 12:12 pm BST

Summary

This page documents the libraries available under the Clients library.

For information on how to update/sort libraries, see: Libraries Introduction.

Details

Categories

Client category allows you to understand the type of client. For example could be Small Animal, Large Animal, Exotic Pet or OAP, Armed Forces.

The unique fields in client categories are:

Icon = The icon of the client category, try to keep this unique for each category for easier identification in grids such as reception.

Colour = The client category colour, this will determine the colour used in result lists such as reception.

Default Patient Category = When registering a new patient, the patient category automatically selected is defined here.

Allow Pre-Invoice = Enables the pre-invoice functionality for this client category, you may only want to enable this on clients with monthly accounts, (often used for Equine, Farm and Large Animals).

Show Location in Diary Day View = Will show the patient location in the diary appointment.

Hide Patient Summary = When set, the patient summary shown when entering the treatment screen is not automatically shown.

Populate Yard Details = Determines if the patient of the client will automatically have the Yard details populated with the clients address.

Introduced By

This library is used in the reception screen to identify how a client was introduced to the practice, examples of records in this library are: Local Advert, Online, Word of Mouth.

Postcodes

Used to specify which postcodes to display by Town.

Titles

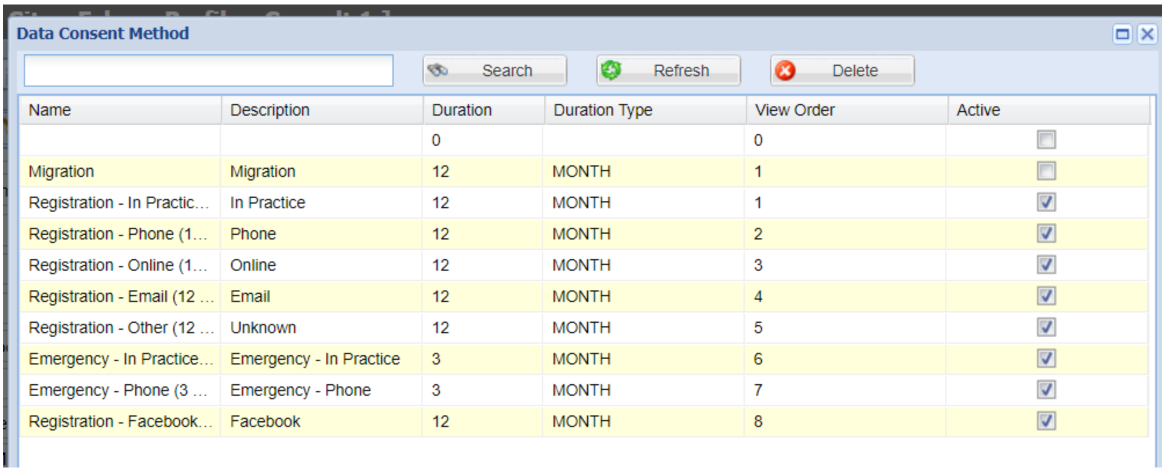
Titles are used in reception and the contact list and are used in communications in printed and electronic formats.

Towns

Towns is the list of towns available for use in addresses in reception and contact list, all towns in the system are added through this library.

Data Consent Method

When registering a Client's Data Consent, the user will select a Data Consent Method from the drop-down list. The Data Consent method selected will set the expiry date from today's date for the Client.



Name	Description	Duration	Duration Type	View Order	Active
		0		0	☐
Migration	Migration	12	MONTH	1	☐
Registration - In Practic...	In Practice	12	MONTH	1	☑
Registration - Phone (1...	Phone	12	MONTH	2	☑
Registration - Online (1...	Online	12	MONTH	3	☑
Registration - Email (12 ...	Email	12	MONTH	4	☑
Registration - Other (12 ...	Unknown	12	MONTH	5	☑
Emergency - In Practice...	Emergency - In Practice	3	MONTH	6	☑
Emergency - Phone (3 ...	Emergency - Phone	3	MONTH	7	☑
Registration - Facebook...	Facebook	12	MONTH	8	☑

Durations can be edited within this screen if a user has the appropriate permissions.

Purge Exception Reason

This library allows the entry of various legitimate reasons for not purging a clients data through the Client Purge Tool.

You only have a Description and Active column in this library.

Communication Type

This library enables the maintenance of the different communication types found within the data consent tab used by users registering and updating client communication preferences. Entries here allow you to maintain if you want to seek permission for specific purposes such as marketing and parasite reminders, or re-order and modify to limit the number of options.

Communication Channel

This library enables the maintenance of the different communication channels, such as email, post and text.

You can add further channels as your business requires, however the system defined options cannot be changed or hidden.