

Prospect Clients

23/10/2024 12:28 pm BST

Summary

Prospect Clients look just like a normal client but have restricted functionality as detailed below. Prospect Clients are registered through our Global API integration Vetstoria. If you are interested in this integration, please contact your RCM or use your Support Ticket System via Merlin.

Details

A Prospect Client's functionality is limited to the following:

- Make Appointment.
- View Appointments.
- Deactivate.
- Register (Renamed Modify Button).

The following is not possible until the Client has been registered:

- Access Accounts.
- Access Treatment.
- Print Labels.
- Access Additional Info.
- Access Notes.
- Edit/Modify of Client or Patient details.
- Arriving Appointments (or other appointment status changes).
- Register a Patient

Registering a Prospect Client

Upon selecting a Prospect Client in Reception, you are notified 'Selected Client needs to be registered, do you want to complete this now?'.

Select 'Yes' to register the Client.

The screenshot shows the 'Reception [User - Jupiter : Site - Esher : Profile - DemoAMP]' window. The 'Client Details' tab is active, showing fields for Client (Title: Professor, Surname: Williams, First name: Prospect, Address: Prospect, Town: Prestigne, County: PROSPECT, Postcode: PROSPECT), Address (Name/No, Address, Town, County, Postcode), and Contact Information (Tel and Email: Home, Business, Mob Personal, Fax, Email Private, Introduced by, Contact ID: 1453398, Site: Esher). A 'Register Client' dialog box is open in the bottom right corner, asking 'Selected client needs to be registered, do you want to complete this now?' with 'Yes' and 'No' buttons.

After selecting 'Yes', the below window will appear. This screen checks if the prospect Client's details match an existing Client's record.

If the client has not already been registered, no results will be returned.

Select 'Register as a New Client' to register the prospect client's details.

The 'Register a Prospect' window shows a message: 'The prospect has no client matches, please register as a new client'. It contains a table with columns: Name, Address, Email, Phone, Mobile, Id. Below the table is a 'Register as a New Client' button. Further down, it says 'Select which patient to merge, or select register as a new patient for selected client.' and shows a table with columns: Name, Species, Breed, Colour. At the bottom are buttons for 'Register as a new Patient', 'Cancel', and 'Merge to Selected Client and Patient'.

The Reception screen will be populated with the already registered details in 'modify' mode. At this stage the user will need to enter information for all mandatory fields and they can proceed to register patients as normal.

Reception [User - jupiter : Site - Esher : Profile - DemoAMP]

Clear Save Modify Deactivate New Document Accounts Payments Appointments Print Send

Client Details Additional Info Notes Documents Communication Data Consent Advanced Search

Client

Title Professor Patient Chip ID Stable Reg Date 05/12/2018

Surname Williams Patient

First name Prospect Category Farm Animal

Address

Home

Name/No

Address Prospect

Town Presteigne

County

Postcode PROSPECT

☒ This is the mailing address

Tel and Email

Home

Business

Mob Personal

Fax

Email Private

Introduced By Introduced by ...

Contact ID 1453398

Show Deactivated Site Esher

Patient Name

Client not selected Or no animals to show for the :

Title	Surname	Firstname	Name/No
Professor	Williams	Prospect	

Upon Save, the Registered Date is set to the current date/time; and the Client Category is updated to the site's default Client Category

Prospect Client as an Existing Client

If the Prospect Client already exists on the system, the workflow below will occur.

Select 'Yes' to register the Client.

Reception [User - jupiter : Site - Esher : Profile - DemoAMP]

Clear Save Register Deactivate New Document Accounts Payments Appointments Print Send Text Send Email

Client Details Additional Info Notes Documents Communication Data Consent Advanced Search

Client

Title Professor Patient Chip ID Stable Reg Date 09/11/2018

Surname Williams Patient

First name Prospect Category Prospect

Address

Home

Name/No

Address Prospect

Town Presteigne

County

Postcode PROSPECT

☒ This is the mailing address

Tel and Email

Home

Business

Mob Personal

Fax

Email Private

Introduced By Introduced by ...

Contact ID 1453398

Show Deactivated Site Esher

Patient Name

Species

Client not selected Or no animals to show for the selected client

Register Client

Selected client needs to be registered, do you want to complete this now?

Yes No

Title	Surname	Firstname	Name/No
Professor	Williams	Prospect	Prospect

A suggested match will display:

The prospect has 1 possible client matches, please select which client to merge with or register as a new client

Name	Address	Email	Phone	Mobile	Id
Professor Prospect Williams	Prospect, PROSPECT				1454573

Page 1 of 1

Register as a New Client

Select which patient to merge, or select register as a new patient for selected client.

Name	Species	Breed	Colour
------	---------	-------	--------

Page 1 of 1

Register as a new Patient Cancel Merge to Selected Client and Patient

Select the Client and Patient you wish to merge the prospect client with from the suggested clients list and select 'Merge to Selected Client and Patient'.

If the patient is a new patient, select the 'Register as a New Patient' button. This creates the animal under the selected Client.

The Prospect Client will now be merged with the existing Client.

Diary Screen

If an appointment has been booked for a Prospect Client, the user will not be able to use or double click on the appointment until the client has been registered.

Attempting to use the appointment will display the same message as reception, 'Selected Client needs to be registered, do you want to complete this now?'.

This will then take you to reception with the same flow as previously described.

It is not possible to arrive, set as treated/paid or enter treatment for this appointment from the diary, appointment list or day lists until the prospect client has been registered.