

Search From Reception

09/06/2025 11:11 am BST

Summary

There are various available data fields seen on the Reception screen that can be used to locate a client's file.

Details

Searching for a Client

1. Enter the Reception Screen ('Reception' button from the main menu).
2. Use any of the available fields to search upon.

For example:

- a) Click into the 'Surname' field and type all or the first part of the name 'Smith' and press return/enter.
- b) The search results box at the foot of the screen shows a list of clients with the surname Smith.
- c) Narrow the results by searching on more criteria, for example enter the Patient's name into the 'Patient' field and press return/enter.
- d) Results can be narrowed even further by entering further criteria such as Post Code, Phone number, House number etc.
- e) When you have located the client you require, select the Client's row in the results box and all of the clients information will be displayed within the Reception Screens' data fields. In addition, all patients belonging to that client will be shown in the Patient box (right-hand side).

Reception [User - Jupiter : Site - Esher : Profile - Back Reception]

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

Client Details Additional Info Notes Documents Communication Data Consent Advanced Search

Client

Title: Mr/Mrs Patient Chip ID Stable Reg. Date: 09/06/2025

Surname: smith Patient

First Name: Category: All

Address

Category: Home

Name/No: Address: Town: County: Postcode: This is the mailing address

Tel and email

Home: Business: Personal Mob: Fax: Personal Email: Introduced By: Introduced by ... Contact ID: Show Deactivated Site: All

Search Results

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

Title	Surname	First Name	Name/No	Address	Address 2	Town	County	Postcode
Mr	Smith	A	23	Shortlands		Portland		DT5 2LG
Mr/Mrs	Smith	J	85	Ladymead		Guildford		GU1 1AT
Mr/Mrs	Smith	A	47	29, Newbridge Hill		Bacup		BA1 3PR

Search by Contact ID

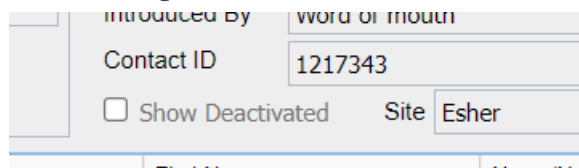
If you know the Client's Contact ID, enter this into the 'Contact ID' field and press enter/return.

Clearing a Reception Search

To clear a search, select the 'Clear' button.

Search for a deactivated Client

If a client has been deactivated (or if you want to check if a client has been deleted) you can search for this client by selecting the checkbox above the search results window called 'Show Deactivated'. This will show any deactivated clients in your results in light blue text.



The screenshot shows a search interface with the following fields and controls:

- Introduced By:** word of mouth
- Contact ID:** 1217343
- Show Deactivated:** ☐
- Site:** Esher

Below these fields, the start of a table is visible with columns labeled 'First Name' and 'Name/No'.

Searching for a Patient

1. Use the above method to search for the Client
2. Once the owner has been selected, you will then see a list of all animals registered to that owner in the Patient box (right-hand side).
3. Select the desired Patient.

Search by Patient Name

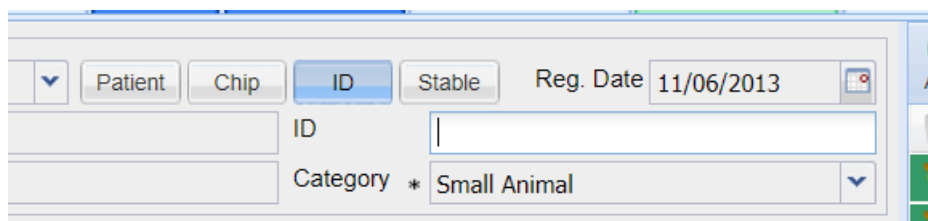
It is possible to search directly on patient name. The results returned will list all clients who own an animal registered under the name entered.

This is useful for animals with less common names as the number of search results returned are lower.

Once the client has been selected, the patient is displayed. To clear the patient filter, highlight and remove the text in the patient filter and press the return key to display all patients.

Search by Microchip ID

1. Select the 'Chip' button.



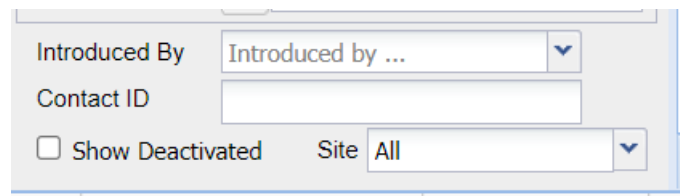
The screenshot shows a search interface with the following fields and controls:

- Buttons:** Patient, Chip (selected), ID, Stable
- Reg. Date:** 11/06/2013
- ID:** (highlighted text input field)
- Category *:** Small Animal

2. The 'Patient' field will now display 'Chip'.
3. Enter the Chip number into the field and press return/enter.

Search by Patient ID

1. Select the 'Patient' button.



Introduced By Introduced by ...

Contact ID

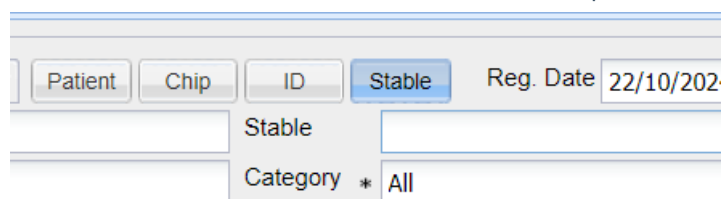
☐ Show Deactivated Site All

2. The 'Patient' field will now display 'ID'.
3. Enter the Patient ID into the field and press return/enter.

Once the client has been selected, the patient is displayed. To clear the patient filter, highlight and remove the text in the patient ID filter and press the return key to display all patients.

Search by Stable

1. Select the 'Stable' button. This link to the 'Int.Stable' detail added into patient details when necessary.



Patient Chip ID Stable Reg. Date 22/10/202...

Stable

Category * All

2. The 'Patient' field will now display 'Stable'.
 3. Enter the Stable number into the field and press return/enter.
-