

Compliance Reminders Manual Run

22/10/2024 1:13 pm BST

Summary

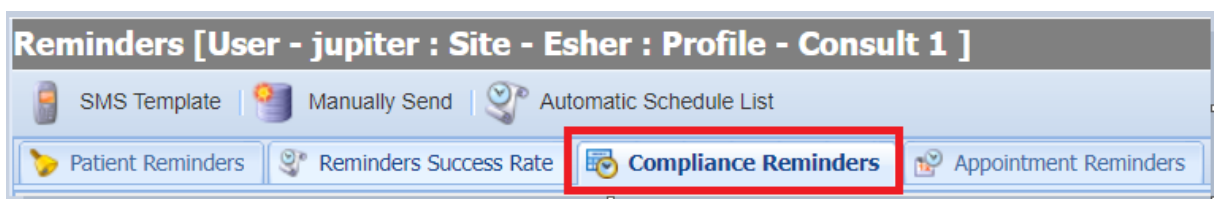
Compliance reminders can be manually viewed and run to be sent out to clients

Details

This page details how to manually run your compliance reminders

View all Compliance Reminders

1. Select Reminders from **Utilities > Reminders**.
2. Select the '**Compliance Reminders**' tab.



3. Enter the criteria you wish to view using the filters provided.

Work Site = Site the compliance reminder was created.

Client Site = Client's registered site.

Status = Filter by Reminders that have been sent/not sent/all.

Dates From and To = Dates you wish to filter by.

Treatment Type = The type of treatment the reminder was created for.

Species = Species of Patient.

Breed = Breed of Patient.

Client Category = Client's registered Category.

Patient Category = Patient's registered Category.

4. Select '**Run**'.

- Any Clients who are due to have a compliance reminder sent within the dates specified will display.

Manually Send Compliance Reminders

To send compliance reminders manually:

- Enter the required criteria and select '**Run**' as above.

| Client Name | Patient | Description | Reminder Date | Work Site | Client Site | Address |
|-------------------|-----------|--------------------------------|---------------|-----------|-------------|--|
| Dame J Loveridge | Bill | Droncit Tabs 20 | 12/06/2024 | Esher | Esher | 45 Park Farm Hampton Middlesex GU12 4AS |
| Dame J Loveridge | Bill | ADVOCATE S/ON CAT LGE 80 4-... | 05/06/2024 | Esher | Esher | 45 Park Farm Hampton Middlesex GU12 4AS |
| Mr Inglis | Dandelion | ADVOCATE S/ON CAT LGE 80 4-... | 09/06/2024 | Esher | Esher | Brunenburg Way Weybridge Surrey GU24 6T2 |
| Mr/Mrs Emma Riley | Bob | Droncit Tabs 20 | 15/06/2024 | Esher | Esher | 198 Eastgate Louth Lincolnshire LN11 9AG |

- Select the '**Manually Send**' button and **select the SMS and/or Email templates** you wish to send

Send Compliance Reminders

Send via SMS

Select Template

Hello \${ClientName} Just to let you know that \${Animal_Name} is due their \${ProductDescription} on \${ReminderDate}. If you need further medication, please contact us.

Hi \${ClientName} we saw you yesterday, please can you fill out this survey: www.surveymonkey.com/survey

Hello \${ClientName}, it is time to apply \${Animal_Name} \${ProductDescription}. Please contact the practice if you need to order some more on 01234 567891

Send via Email

Select Template

Compliance reminder template.docx

COMPLIANCE_REMINDER_.docx

Communication Type: Contractual

Send Reminders Exit

- Select '**Send Reminders**'.

Note: Any reminders sent will be added into the client communications tab.

