



# Client Detail Checker

2.7 New Feature Documentation

## What is it?

The Client Detail Checker has been developed to improve communication with your clients by helping you to keep your Client's details accurate and up to date.

## How does it work?

### Client Detail Checker Configuration

A default has been added to Utilities > System > Defaults > Reception Tab.

This is where you can define after how many days you would like to be prompted to check client details.

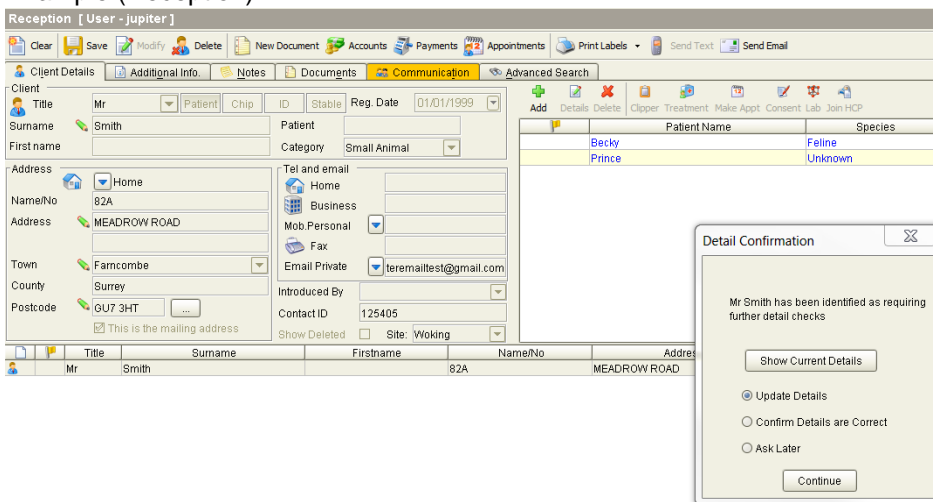
No. of Days before prompting check details

Please note that this must be configured per site.

### Detail Checker Prompt

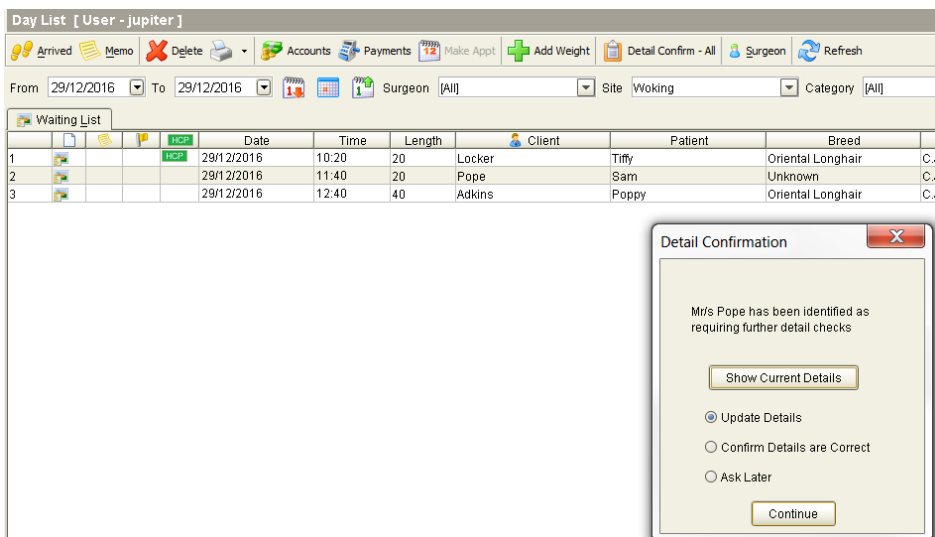
The Client Detail Confirmation window will appear when selecting a Client from the Reception screen or from any of the Day lists. If the client's details require checking, you will receive a pop-up window.

#### Example (Reception):



The screenshot shows the 'Reception [User - jupiter]' interface. The main window displays client details for 'Mr. Smith', including contact information and a list of patients: 'Becky' (Feline) and 'Prince' (Unknown). A 'Detail Confirmation' dialog box is overlaid on the right, with the message: 'Mr Smith has been identified as requiring further detail checks'. The dialog offers three options: 'Show Current Details', 'Update Details' (selected), 'Confirm Details are Correct', and 'Ask Later'. A 'Continue' button is at the bottom.

#### Example (Waiting List):

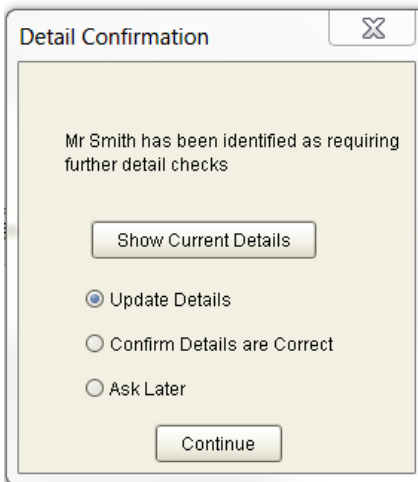


The screenshot shows the 'Day List [User - jupiter]' interface. The 'Waiting List' tab is active, displaying a table of appointments. A 'Detail Confirmation' dialog box is overlaid on the right, with the message: 'Mr/s Pope has been identified as requiring further detail checks'. The dialog offers three options: 'Show Current Details', 'Update Details' (selected), 'Confirm Details are Correct', and 'Ask Later'. A 'Continue' button is at the bottom.

	Date	Time	Length	Client	Patient	Breed
1	29/12/2016	10:20	20	Locker	Tiffany	Oriental Longhair
2	29/12/2016	11:40	20	Pope	Sam	Unknown
3	29/12/2016	12:40	40	Adkins	Poppy	Oriental Longhair

## Client Detail Confirmation Window

This window provides you with 4 options:



Field	Description
<b>Show Current Details</b>	Generates a document with currently registered details.
<b>Update Details</b>	Takes you to the Client's record in reception allowing you to modify/update details.
<b>Confirm Details are correct</b>	No changes to Client details are made and the last checked date is updated with today's date.
<b>Ask Later</b>	Last checked date remains the same, next time the client is selected, window will display again.

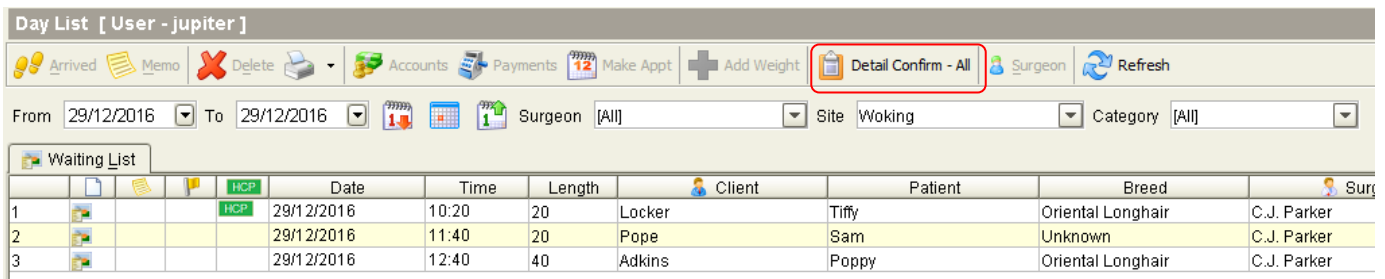
## Client Details Last Checked

You can view when a Client's details were last checked on the Clients record which is accessed via the Additional Info Tab for the Client in the Reception Screen.

## Bulk Client Detail Checking

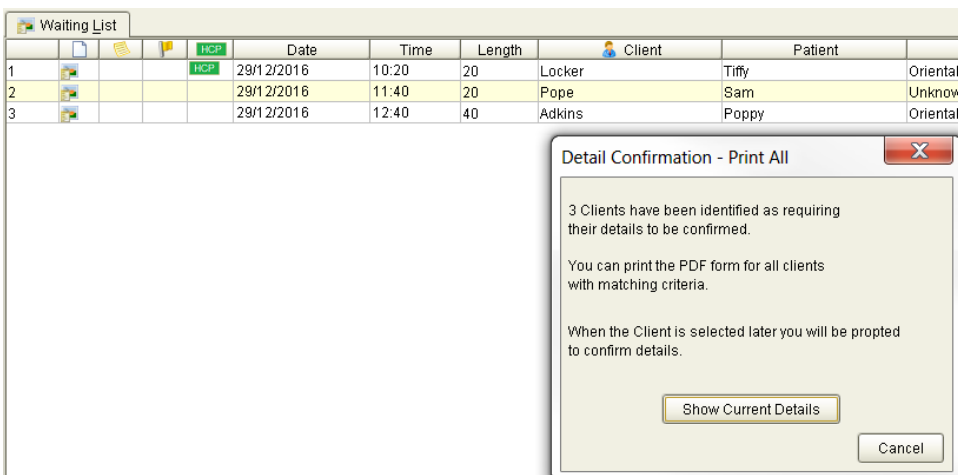
It is also possible to pre-print forms to check Client's details in bulk via the Waiting List.

From the Waiting List select the 'Detail Confirm – All' button.



HSCP	Date	Time	Length	Client	Patient	Breed	Surgeon
	29/12/2016	10:20	20	Locker	Tiffany	Oriental Longhair	C.J. Parker
	29/12/2016	11:40	20	Pope	Sam	Unknown	C.J. Parker
	29/12/2016	12:40	40	Adkins	Poppy	Oriental Longhair	C.J. Parker

Once Selected, you will receive a pop-up regarding the status of your Clients on the waiting list for the dates specified.



Selecting 'Show Current Details' provides you with a PDF document containing All Client's details with their last checked date.

I don't want to use this feature.

To deactivate this feature go to Utilities > System > Defaults > Reception Tab.

Set the value to 0 to deactivate functionality.

No. of Days before prompting check details