

Setup Search File to Fetch Reviews IntraVet

To create a new Fetch Reviews output file in IntraVet:

- Select **Communications**
- Then **Recall Generator Search**

Recall Generator .. Search

Description

Client: Exclude Classifications:

Patient: Last Visit: 04/27/2016 - 04/28/2016
Include Status: Active

History: No history options

Search: Records: One record per client regardless of the number of patients matching the parameters
Reminders: Include patients setup not to receive reminders
Email: Include only clients with E-mail addresses

Right-click to add parameters for each section. Double-click to edit.

Abort Search

Right-click on **Patient: Last Visit** and change to cover date range and click **Done**

- We recommend daily or weekly
 - o If daily, both dates will be date of previous day
 - o If weekly, choose 7 days prior and the previous date

Match the **Search** fields above or customize, as you desire:

- **Records:** One record per client regardless of patients matching
- **Reminders:** Include patients setup not to receive reminders
- **Email:** Include only clients with email addresses(if you prefer to Fetch via email)

Click **Begin Search** button

When the search is complete you will return to a populated **Recall Generator Search**

To save these results and prepare them for Review Retrievers:

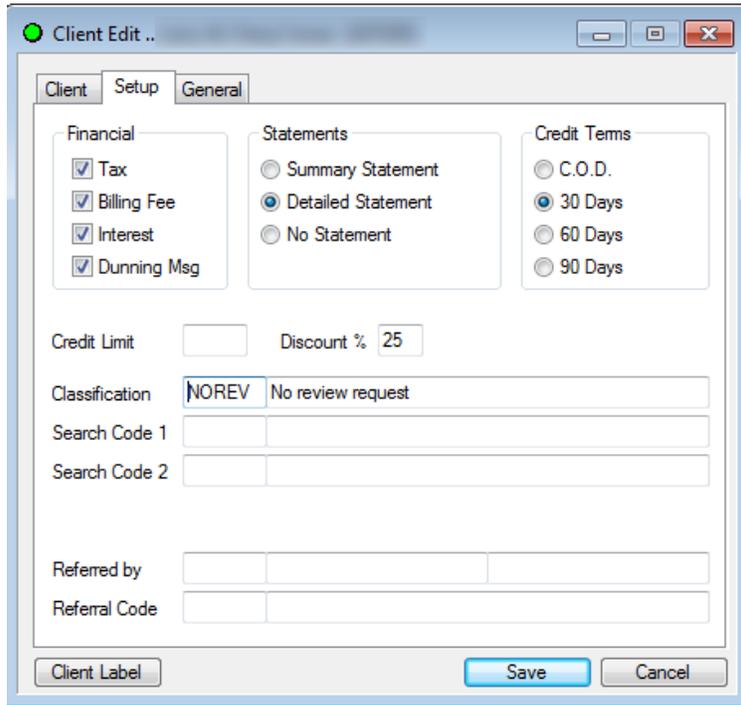
- Click the **Export List** tab, you will see the **Export** dialog box above
- Select **Include clients with future appointments**
- Highlight the following **Client Section** fields
 - FIRSTNAME
 - LASTNAME
 - PHONE1
 - EMAIL
- Select the **Dbase File** type: file should end in **.ASC**
- Click the **Export** button
- Then choose where to save the file, we recommend your **Desktop**
- Set File name, we recommend using **DDMMYY** format

You are now ready to Fetch Reviews from your Review Retriever's account!

Flag clients to no longer show up in search

If you would like to flag a client so that they no longer show up in the search, you can create the following flag:

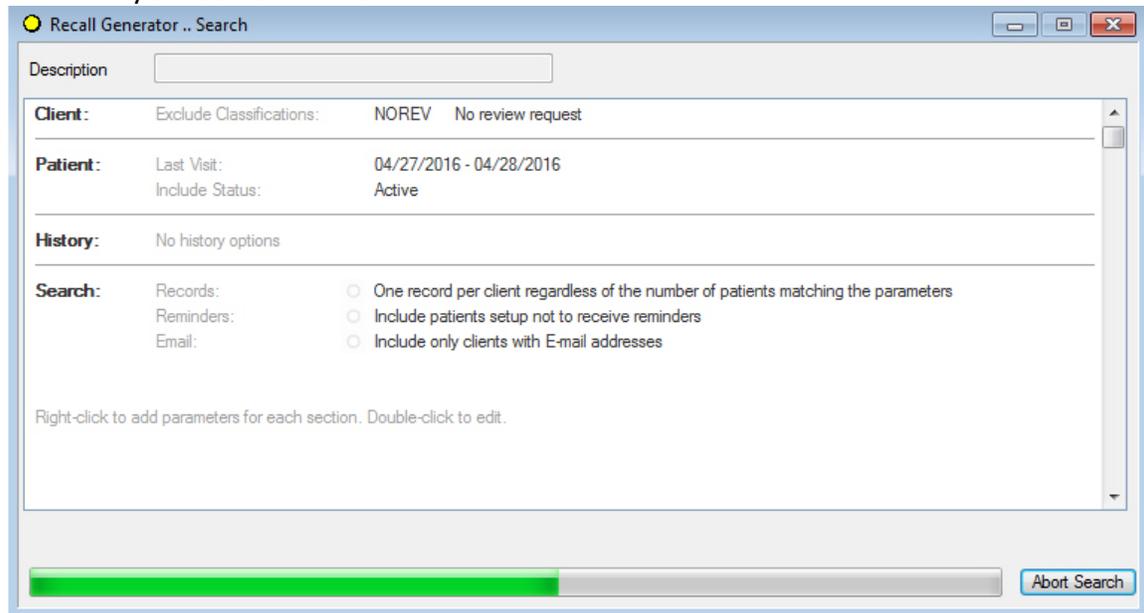
- **NOREV:** No review request



The screenshot shows the 'Client Edit ..' dialog box with the 'General' tab selected. The 'Classification' field is set to 'NOREV' with the description 'No review request'. Other fields include 'Credit Limit', 'Discount %' (25), 'Search Code 1', 'Search Code 2', 'Referred by', and 'Referral Code'. The 'Financial' section has checkboxes for 'Tax', 'Billing Fee', 'Interest', and 'Dunning Msg'. The 'Statements' section has radio buttons for 'Summary Statement', 'Detailed Statement' (selected), and 'No Statement'. The 'Credit Terms' section has radio buttons for 'C.O.D.', '30 Days' (selected), '60 Days', and '90 Days'. Buttons for 'Client Label', 'Save', and 'Cancel' are at the bottom.

You will then select the **NOREV** flag in the **Client: Exclusion Classifications**

Then run your search like normal



The screenshot shows the 'Recall Generator .. Search' dialog box. The 'Description' field is empty. The search parameters are displayed in a list:

- Client:** Exclude Classifications: NOREV No review request
- Patient:** Last Visit: 04/27/2016 - 04/28/2016; Include Status: Active
- History:** No history options
- Search:** Records: One record per client regardless of the number of patients matching the parameters; Reminders: Include patients setup not to receive reminders; Email: Include only clients with E-mail addresses

Right-click to add parameters for each section. Double-click to edit.

At the bottom right, there is an 'Abort Search' button.