

# Search From Reception

30/07/2025 1:40 pm 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).

Practice 01 | Site Name 01

Reception Sir John Smith

Client Details Additional Info Notes Documents Communication Data Consent Tax Details Advanced Search

Client

Title Sir Patient Chip ID Stable Reg. Date 29/07/2025

Surname Smith Patient

First Name John Category Small Animal

Address

Category Home Tel and email

Name/No Mewslade Business

Address Blackmore Road Personal Mob. 01277 842363

Town Ketsall Personal Email Isantarelliemwiah.co.uk

County Gossip

Postcode CM15 0BE Contact ID 1510194

☒ This is the mailing address ☐ Show Deactivated Site Esher

Displaying 1 - 1 of 1

Title	Surname	First Name	Name/No	Address	Address 2	Town	County	Postcode	Business Tel	Home Tel	Site Name	Last Visited
Sir	Smith	John	Mewslade	Blackmore Road		Ketsall		CM15 0BE	01277 84...		Esher	29/07/2025
Mr	Smith	John	14	Street Lane		Woking	Surrey	GU22 1AA	023 4765 4321	023 4987...	Esher	03/03/2022
Mrs	Smith	Joe	34	DENNIS WAY		London	London county	AASDF			Esher	12/10/2021
Mr	Smith	Jonathon									Esher	20/03/2018
Mr	Smith	Jon									Esher	20/03/2018

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Id:1510194, Sir John Smith, Mewslade Blackmore Road, Ketsall, CM15 0BE, Home: +44 1277 842363, Personal: +44 7812 828282, Personal: Isantarelliemwiah.co.uk, Small Animal

Balance 18.75  
Draft 0.00

## 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.

Introduced by

Contact ID

☒ Show Deactivated Site All

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

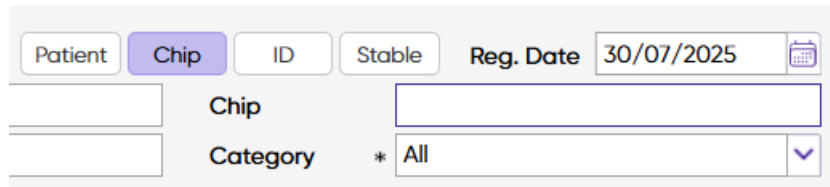
It is possible to search directly on patient name. The results returned will list all clients who own an animal registered under the name entered.

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.
2. The 'Patient' field will now display 'Chip'.
- 3.



The screenshot shows a search interface with four buttons: 'Patient', 'Chip', 'ID', and 'Stable'. The 'Chip' button is highlighted in purple. To the right of these buttons is a 'Reg. Date' field containing '30/07/2025' and a calendar icon. Below the buttons, there are two input fields. The first field is labeled 'Chip' and is empty. The second field is labeled 'Category' and contains the text '\* All' with a dropdown arrow on the right.

4. Enter the Chip number into the field and press return/enter.

### Search by Patient ID

1. Select the 'Patient' button.
2. The 'Patient' field will now display 'ID'.



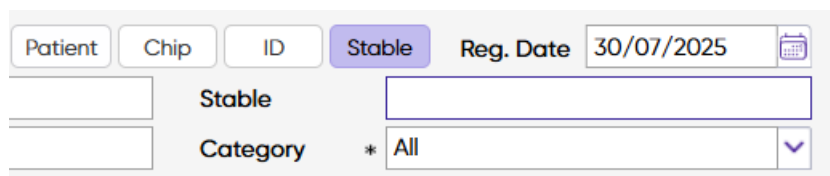
The screenshot shows the same search interface as before, but now the 'ID' button is highlighted in purple. The first input field is now labeled 'ID' and is empty. The 'Category' field remains the same, containing '\* All'.

1. 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.



The screenshot shows the search interface with the 'Stable' button highlighted in purple. The first input field is now labeled 'Stable' and is empty. The 'Category' field remains the same, containing '\* All'.

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