Advanced Search

30/07/2025 2:30 pm BST

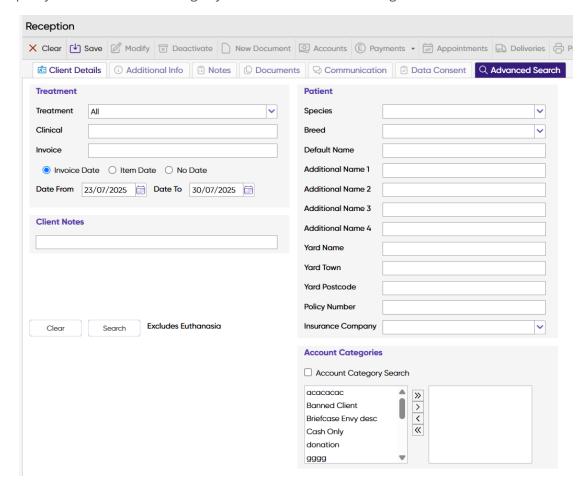
Summary

The Advanced Search feature is used to find clients and patients by information such as invoice number, dispensed product name and treatment date. Entering the criteria and running the search will load all known clients with matching criteria.

Details

Using Advanced Search

- 1. Navigate to Reception.
- 2. Select the 'Advanced Search' tab.
- 3. Specify the search criteria using any combination of the following areas:



Treatment

The following can be searched by Invoice Date/Item Date/No date.

Treatment = Treatment Item.

Clinical = Clinical Notes.

Invoice = Invoice Number.

Client Notes

Search by Notes stored against Client's record.

Patient

Species = Patient's registered species.

Breed = Patient's registered breed.

Default Name = Patient Name.

Additional Name 1 = Additional Name registered in Patient Details.

Additional Name 2 = Additional Name registered in Patient Details.

Additional Name 3 = Additional Name registered in Patient Details.

Additional Name 4 = Additional Name registered in Patient Details.

Yard Name = Yard name registered in Patient Details.

Yard Town = Yard town registered in Patient Details.

Yard Postcode = Yard Postcode registered in Patient Details.

Policy Number = Insurance Policy number.

Insurance Company = Patient's registered Insurance Company.

Account Categories

Use the arrows to select and move the Account Categories you want to search by.