

# 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:

Reception

Clear

Save

Modify

Deactivate

New Document

Accounts

Payments

Appointments

Deliveries

P

Client Details

Additional Info

Notes

Documents

Communication

Data Consent

Advanced Search

Treatment

TreatmentAll

Clinical

Invoice

Invoice Date

Item Date

No Date

Date From23/07/2025Date To30/07/2025

Client Notes

Clear

Search

Excludes Euthanasia

Patient

Species

Breed

Default Name

Additional Name 1

Additional Name 2

Additional Name 3

Additional Name 4

Yard Name

Yard Town

Yard Postcode

Policy Number

Insurance Company

Account Categories

Account Category Search

acacacac

Banned Client

Briefcase Envy desc

Cash Only

donation

gggg

>>

>

<

<<

## 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.

---