

# Compliance Reminders Manual Run

24/07/2025 2:21 pm BST

## Summary

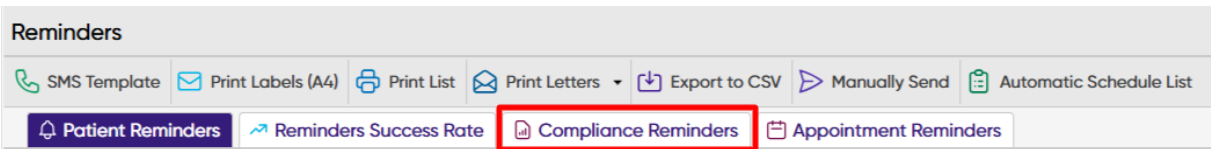
Compliance reminders can be manually viewed and run to be sent out to clients

## Details

This page details how to manually run your compliance reminders

## View all Compliance Reminders

1. Select Reminders from Comms > Reminders.
2. Select the 'Compliance Reminders' tab.



3. Enter the criteria you wish to view using the filters provided.

Work Site = Site the compliance reminder was created.

Client Site = Client's registered site.

Status = Filter by Reminders that have been sent/not sent/all.

Dates From and To = Dates you wish to filter by.

Treatment Type = The type of treatment the reminder was created for.

Species = Species of Patient.

Breed = Breed of Patient.

Client Category = Client's registered Category.

Patient Category = Patient's registered Category.

4. Select 'Run'.
5. Any clients who are due to have a compliance reminder sent within the dates specified will display.

## Manually Send Compliance Reminders

To send compliance reminders manually:

1. Enter the required criteria and select 'Run' as above.

**Reminders**

SMS Template

Manually Send

Automatic Schedule List

Patient Reminders

Reminders Success Rate

Compliance Reminders

Appointment Reminders

**Run Criteria**

Work Site:

Treatment Type:

Client Category:

Client Site:

Species:

Patient Category:

Status:

Breed:

Date From:

Date To:

Run

Reset

Client Name	Patient	Description	Reminder Date	Work Site	Client Site	Address
Dame J Loveridge	Bill	Advocate S/ON Cat Lge 80 4-8K...	05/08/2025	Esher	Esher	45 Park Farm Hampton Middlesex GU12 4AS
Mr Inglis	Dandelion	Advocate S/ON Cat Lge 80 4-8K...	09/08/2025	Esher	Esher	Brunenburg Way Weybridge Surrey GU24 6T2
Mr/Mrs David Hall	Sammy	PHP Joining Fee	07/08/2025	Esher	Esher	12 Allden Gardens Aldershot GU12 4AQ
Mrs A Aridley	Millie	Flea	19/08/2025	Esher	Ascot	Scalwell Lane Esher Surrey GU24 6BT

2. Select the 'Manually Send' button and select the SMS and/or Email templates you wish to send

**Send Compliance Reminders**

☐

**Send via SMS**

Select Template

Hello \${ClientName} Just to let you know that \${Animal\_Name} is due their \${ProductDescription} on \${ReminderDate}. If you need further medication, please contact us.

Hello \${ClientName}, it is time to apply \${Animal\_Name's} \${ProductDescription} . Please contact the practice if you need to order some more on 01234 567891

Hello \${ClientName}, it is time to apply \${Animal Name's} \${ProductDescription}. Please contact

☐

**Send via Email**

Select Template

Compliance reminder template.docx

COMPLIANCE\_REMINDER\_.docx

Communication Type

Send Reminders

Exit

a. Select 'Send Reminders'.

Note: Any reminders sent will be added into the client Communications tab.

---