

IntraVet

Email and Recall Generator

2007



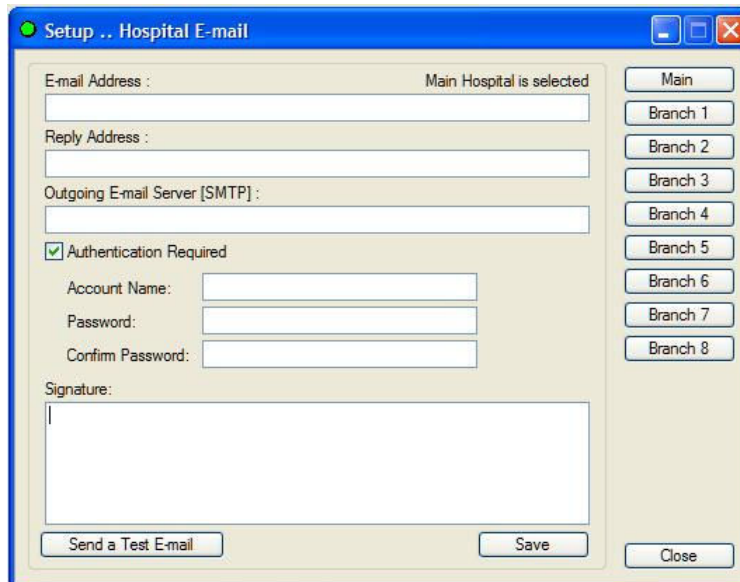
Hospital E-mail Setup

IntraVet can E-mail reminders, referral letters, and purchase orders. You can also send E-mail with attachments such as pictures, appointments, callbacks and reminders to individual accounts and doctors.

To use the E-mail capabilities of IntraVet, you will need Internet access and an E-mail account for your practice. To send E-mail from a workstation, that workstation must have access to the Internet. If you are on Terminal Services or Citrix, your server must have access to the internet.

Before using E-mail within IntraVet you must set up the E-mail options within the program for each branch that you use.

From the IntraVet Main menu, select "Setup", then "Program Setup" and then "Hospital E-Mail Setup".

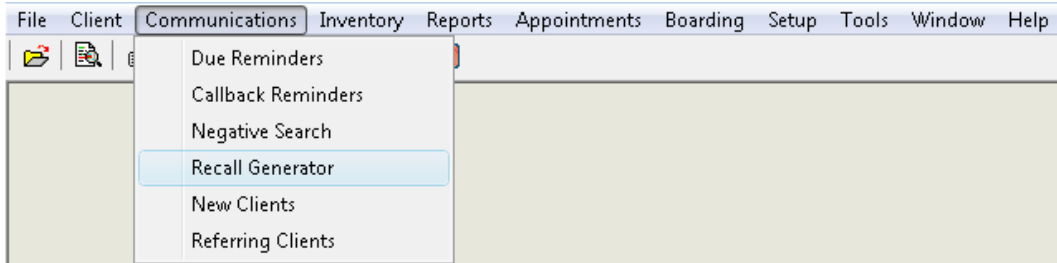


1. The main hospital and each additional branch can have an individual address set up for sending and receiving e-mail. To enter the information for the main clinic, click on <Main>.
2. Enter your E-mail address.
3. <Tab> to the next field and enter the default E-mail reply address. In most cases the E-mail and the reply address will be the same. The reply address is the default address if someone tries to reply to your E-mail.
4. In the next field, enter the outgoing E-mail server address. Your Internet provider should be able to supply you with this address.
5. If your provider requires authentication, check the box and enter your account name and password. Your Internet Provider should be able to supply you with this information.
6. Information in the signature field will printed at the bottom of each E-mail. You can enter your clinic name, address, and phone number, or leave it blank.
7. Before you close, you can send a test email to your hospital email account.
8. To record the information, click <Save>.
9. Repeat for all branches that you have defined. Click <Close> when your changes are complete.

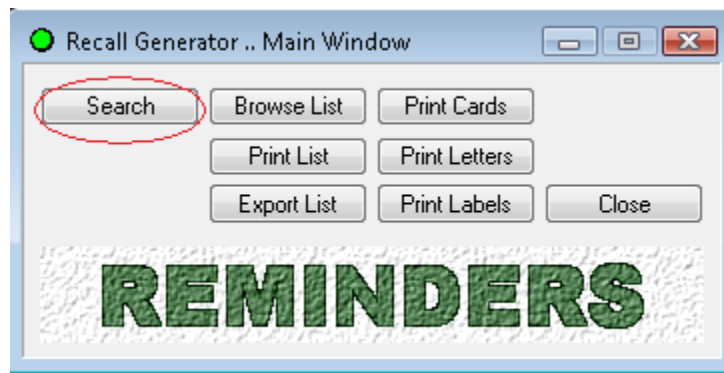
Recall Generator Search

To find all clients that have an email address, go to the Recall Generator Search.

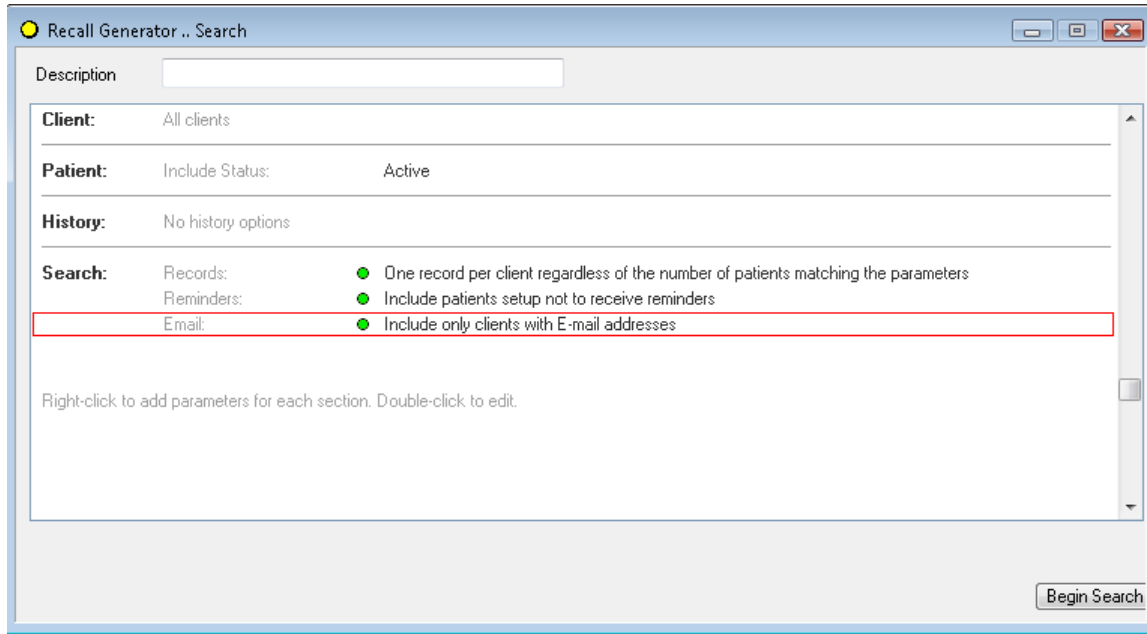
1. Click on Communications and select Recall Generator.



2. Click on the Search Button from the Recall Generator Main Window



3. The search parameters default to all clients and all active patients. Search Parameters are the only thing that we need to select at this point. Search Parameters are set by double-clicking your choices, which will insert a green "dot" in front of the parameter's description.
4. You may choose "One record per client regardless the number of patients matching the parameters". If selected, search results show each client only once, regardless of the number of patients the client has within the search parameters.
5. You may double-click "Include patients set up not to receive reminders". If you select this option, patients that are set up NOT to receive reminders will be included in the search. If you do not want to include these patients, leave this circle blank.
6. Double-click "Include only clients with e-mail addresses" to limit your search to clients with an e-mail address.
7. Choose Begin Search. Once finished, it will return to the Recall Generator Main Window.



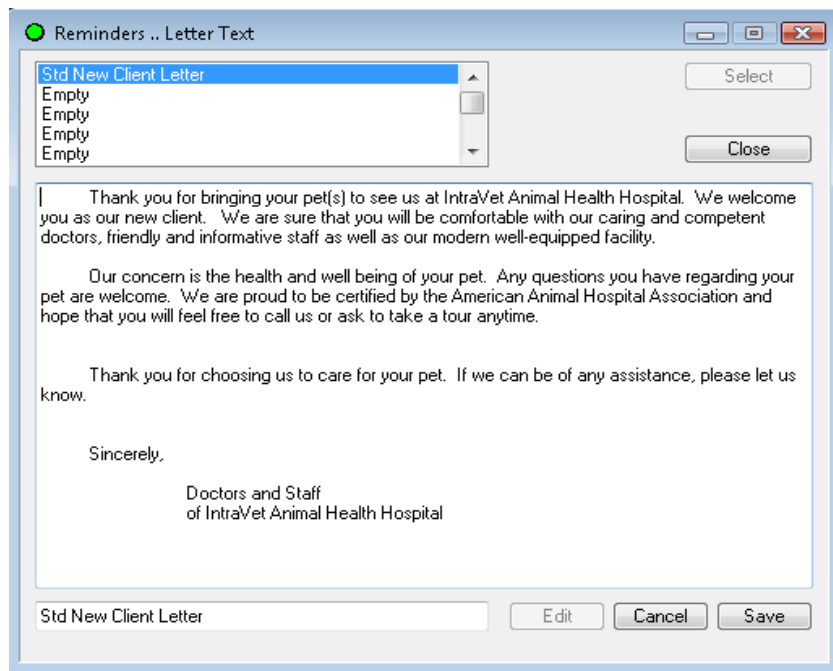
Browse List (Optional)

In addition to sending cards, e-mails or letters, you can browse a list of the search results and edit it. All recall and search modules allow the removal of recalls from the list when you display the latest selection, so that you can manually remove anyone from the list that you do not want to recall. To delete an entry, click to select the line and then click <Delete Line>. This removes the record from the reminder list so that no correspondence will be sent.

AccNo	Name	Patient	Recall	Due Date	N
12	Gloria Davis	POOCHIE	142	Rabies 3 year Vaccin	03/11/2003 1
15	Morgan Epstein	ABIGAIL	143	Rabies 3 year Vaccin	09/19/2003 1
35	Tony Long	JAKE	142	Rabies 3 year Vaccin	01/14/2003 1
35	Tony Long	NELLIE	142	Rabies 3 year Vaccin	04/27/2003 1
35	Tony Long	PEE-WEE	142	Rabies 3 year Vaccin	11/04/2003 1
44	Sarah McAddie	MADDY	142	Rabies 3 year Vaccin	08/31/2003 1
51	Estelle Garvin	SUKI	142	Rabies 3 year Vaccin	08/15/2003 1
61	James Weeks	HOLLY	142	Rabies 3 year Vaccin	02/05/2003 1
66	Katte Somers	PATCHES	143	Rabies 3 year Vaccin	04/15/2003 1
152	Karra Gordon	PENNY	142	Rabies 3 year Vaccin	08/03/2003 1
177	Nancy Myer	ERNIE	143	Rabies 3 year Vaccin	08/29/2003 1
205	Gideon Taylor	SHEBA	142	Rabies 3 year Vaccin	09/09/2003 1
223	Amy Helmer	ALEX	143	Rabies 3 year Vaccin	01/03/2003 1
309	John Moore	JENNY	143	Rabies 3 year Vaccin	01/23/2003 1

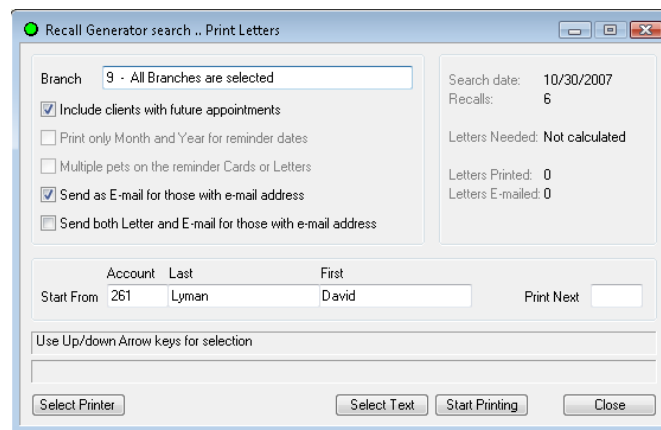
Selecting and Editing the Text

1. Click the Print Cards button (even though you will be sending e-mails).
2. Choose <Select Text>. Select the text that you want to send by highlighting it. Move up and down the list using the mouse or arrow keys. To create a new text message, select a letter that says "Empty" and edit it. Name the text at the bottom of the window.
3. Be sure to <Save> your text. Then click <Select> to select it.



Send as email for those with email addresses

1. Check this box to send emails to all clients that have E-Mail Addresses. You may decide to on the other options as well (whether to include clients with scheduled appointments and whether to also print letters as well as send e-mails).



2. After selecting your options, click on start printing. This will send e-mails or both an email and a letter to all of those clients in your search list (depending on your selections).



Emailing in IntraVet

- Email individuals from the client account: Include reminders, callbacks, appointments and attachments. In the client account select <EMAIL> , check your options and click on <COMPOSE>. An email is started with your selected options entered and the ability to add attachments. Email a patient's history by printing the history to a pdf printer and attaching it to your email (Freeware programs to try for pdf printers: CutePDF, Bullzip PDF or PrimoPDF). Images and files attached in history can also be include by first exporting as a jpg and then adding as an attached image/file.
- Using referral letters? Email them to the referring doctor by choosing the <Email> button in the bottom right of the referral letter. Referral doctors must have an email listed in their referral doctor setup first.
- Email appointments by right clicking on each appointment and selecting *Email Appointment*. At this time, you do not have an option to email all at once or enter text with the email. If more information is needed you can right click on the appointment and go to the client's account and send an email.
- Email your reminders by choosing the option to *Send as Email for those with an Email Address*. You also have the option to send both a card and an email! If you use the online reminder option shown above you can still send an email to those with an email account. After selecting the text, choose the option to *Send as Email...only* and then <Select Printer> in the bottom left. Choose to print to file or a pdf printer. This allows emails to be sent out but sends the cards to a file so they don't print to your regular printer. You can review the <Browse List> selection and delete any clients marked as being sent an email then export and upload the remaining list to IntraVet.
- Any searches you create in Recall Generator can be sent to email clients only by selecting the Search option to *Include only clients with an email address*. This will limit the search to those with email accounts only.
- Email Purchase Orders directly to your Rep by putting their email addresses in the vendor code setup. After you have saved your purchase order, simply right click on it & select *Email*. Off it goes!