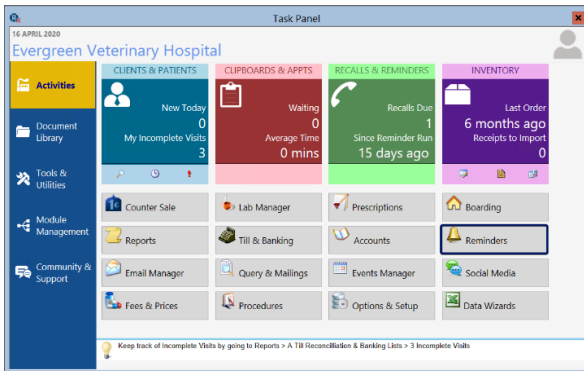
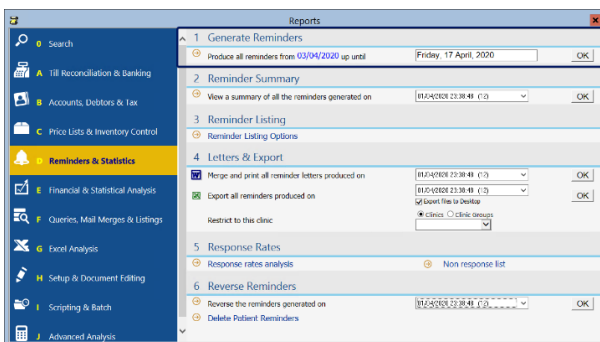


# Back on Track - Reminders

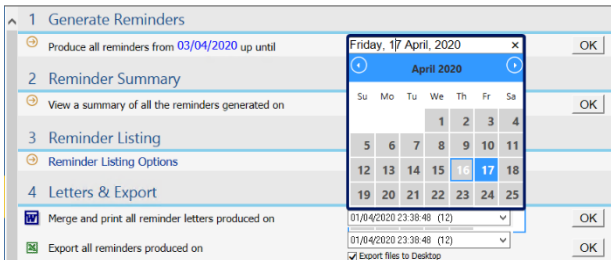
RxWorks



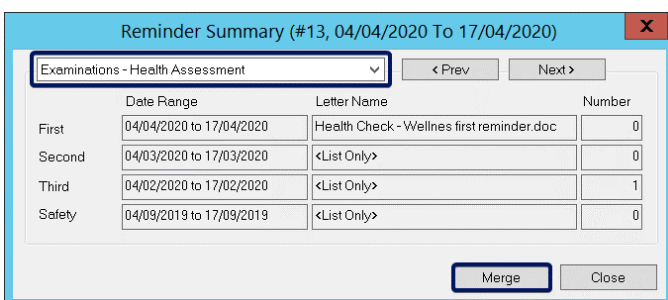
- This guide will take you through a quick refresh on running your reminders.
- Firstly, go to **Task Panel** then **Reminders**.



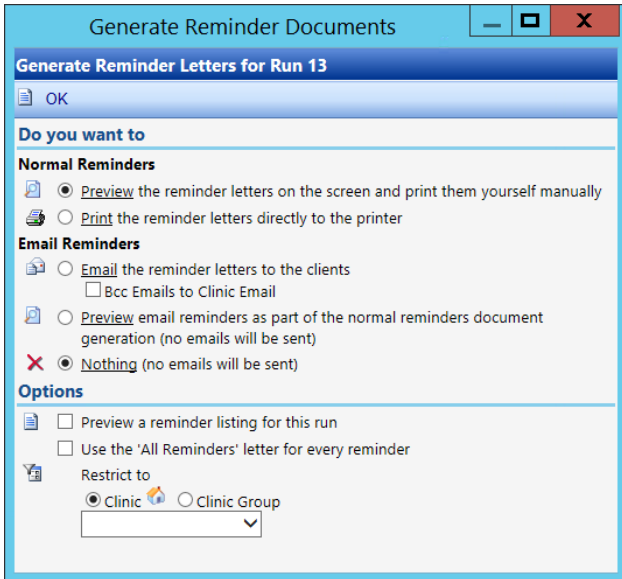
- From here you will see the date of the last **reminder** run that was performed.



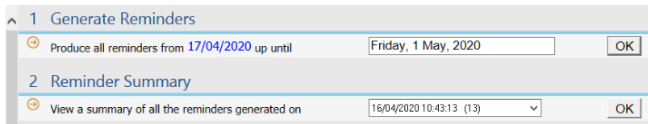
- RxWorks will automatically calculate two weeks into the future as the time period to run the reminders for but you are able to change the date to suit you.
- Once done, click **OK**.



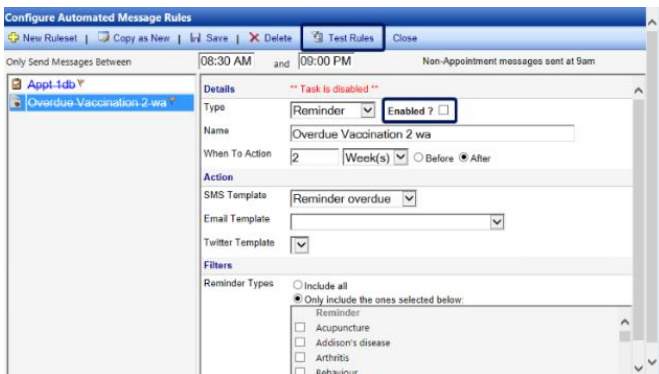
- All of the reminders due in that time period will appear in a box for you to have a look through.
- It will show how many first, second, third and safety net reminders are due.
- You can go through each type of reminder by either clicking on the drop-down list or click **Prev/Next**.
- Once you have had a look at these, click on **Merge**. (even if you are not merging into any documents, you still need to do this.)



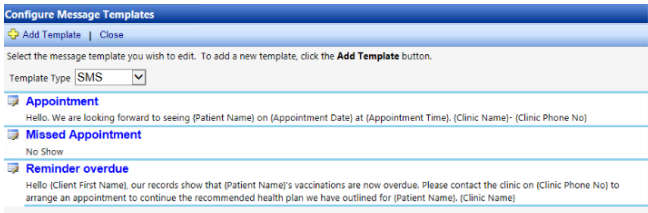
- If you have your reminders configured to send out a letter, you can still process this as usual through this process this as usual through this screen.
- If you do not want to E-mail all the clients that are due the reminder, due to the restrictions on which reminders can/cannot be done at the moment, you can leave Emails as set to **nothing** and they will not be sent from RxWorks.
- Previewing the reminders will generate a PDF document to show you how many reminders are due.
- Click **OK** when you are finished.



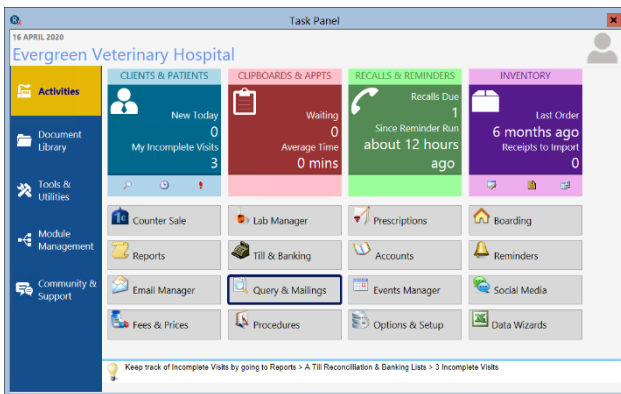
- Once you have had a look/sent out the reminders, you will see that the screen has refreshed the reminder dates for you.



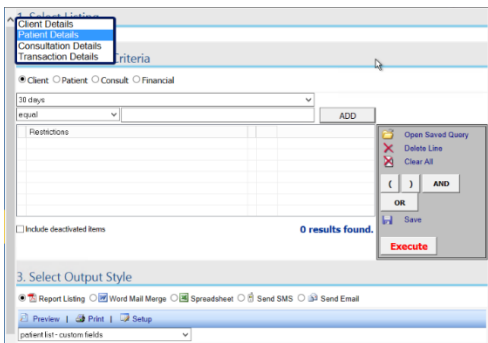
- If you are using **Automated Message Manager** for your reminders and you disabled your rules, you'll need to re-enable them.
- Go to the **Task Panel, module Management, Automated Message Manager** then, **Automated Message Rules**.
- Ensure the **Enabled** tick box is ticked.
- Before you enable the rule, you can click **Test Rules** and select the date range you want to preview. This will provide an Excel spreadsheet of all clients that are due to get an **SMS** or **Email**.
- Note, for those who did not turn the rules off, the SMS messages or emails would have still been going out to your clients during this time.



- If you are looking to create a new rule to include a new template, you need to create the template first.
- For example, this could be if you are wanting to produce a specific COVID-19 template to send to clients.
- Go to **Task Panel, Module Management, Automated Message Manager then Message Templates.**

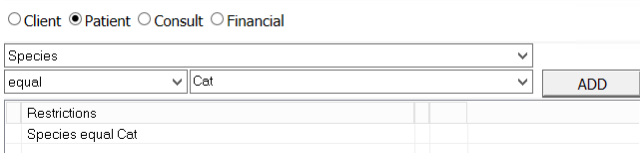


- If you do not want to perform an entire reminder run in RxWorks and would rather highlight specific animals, you can use **Queries, Mail Merges and Listings** to do this.



- Set **Option 1 to Patient Details** to run the query.

## 2. Build Selection Criteria



- In **Section 2 – Client, Patient, Consult and Financial** have different options that you can add to query. In this example, you can search for all cat records.

- Using the drop-down list, select your criteria that you wish to add.
- When you have selected the field you need, click **ADD**.

**2. Build Selection Criteria**

Client  Patient  Consult  Financial

Vaccinations - Feline Immunodeficiency Virus Next Due-Cat  
 less than or equal to 30/04/2020 ADD

Restrictions		
Species equal Cat	AND	
Feline Immunodeficiency Virus Next Due greater than or equal to 30/04/2020	AND	
Feline Immunodeficiency Virus Next Due less than or equal to 30/04/2020	AND	

Include deactivated items **0 results found.**

Execute

- In this example, the species is cat and have chosen if the cats have a reminder due between a certain date period.

**2. Build Selection Criteria**

Client  Patient  Consult  Financial

30 days

Account Type

Address 1

Address 2

Allow Account Statements via Email

Allow Automated Messages via Email

Allow Automated Messages via SMS

Allow Automated Messages via Twitter

Allow Direct Marketing

Allow Document Emailing

Allow Event Messages via Email

Allow Event Messages via SMS

Allow Event Messages via Twitter

- If you change the radio button back to client, you can select the criteria surrounding contact preferences.
- Once you have selected the option you need, click **Add** to add it to the search criteria.

**2. Build Selection Criteria**

Client  Patient  Consult  Financial

Allow Direct Marketing  
is true ADD

Restrictions		
Species equal Cat	AND	
Feline Immunodeficiency Virus Next Due greater than or equal to 30/04/2020	AND	
Feline Immunodeficiency Virus Next Due less than or equal to 30/04/2020	AND	
Allow Direct Marketing is true		

Include deactivated items **0 results found.**

Execute

- Once you have built your search criteria, click on **Execute**.
- This will search all records and bring back a total for you.

**1. Select Listing**

Client Details

**2. Build Selection Criteria**

Client  Patient  Consult  Financial

Allow Direct Marketing  
is true ADD

Restrictions		
Species equal Cat	AND	
Feline Immunodeficiency Virus Next Due greater than or equal to 30/04/2020	AND	
Feline Immunodeficiency Virus Next Due less than or equal to 30/04/2020	AND	
Allow Direct Marketing is true		

Include deactivated items **0 results found.**

Execute

**3. Select Output Style**

Report Listing  Word Mail Merge  Spreadsheet  Send SMS  Send Email

Send Selected Email Template

Template

Attach File

Execute

- To bring the client contact details through onto an Excel spreadsheet or a PDF document, change **option 1** to show as **Client Details** but do not press **Execute** again as this will change the total results found.

**3. Select Output Style**

Report Listing  Word Mail Merge  Spreadsheet  Send SMS  Send Email

Send Selected Email Template

Template

Attach File

Execute

- **Section 3** allows you to select the method you wish to see the results in, i.e. **Excel, PDF, Work Mail Merge** or to send an **SMS or Email**.
- If you want to send an SMS or Email, ensure you have set up your template first from the **Message Templates** section of **Automated Message manager**.