

NEW FEATURES AVAILABLE IN Vi5 ==== BUILD 4560== Vi5/PB12 =====

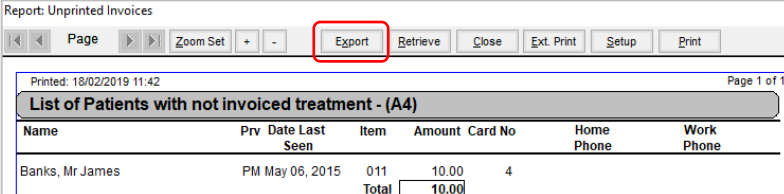
ENHANCEMENT: [Reports are available to export as Excel](#)

The following nine reports are now included in the list of reports available to export to CSV and Excel formats. This change provides users with a better way to analyse the reports generated from the system.

- Birthday List
- Fee Level Financial Analysis
- Health Funds Comparison Report
- Insurance Funds Financial Analysis
- Location Fee Level Comparison Report
- New Patients Report
- No Quote/Planned Treatment Performed
- Report on Other Details from Patients
- Unprinted Invoices

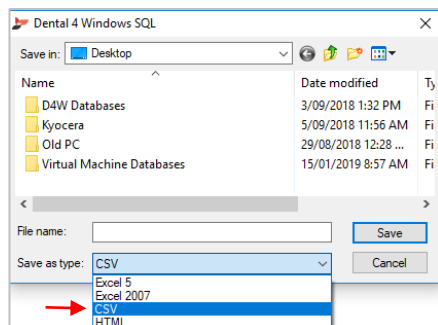
Manually Run a Report

1. Go to **Location Management > Reports** tab
2. Double click on the report
3. Select report parameters
4. Press **OK** button
5. Press **Export** button



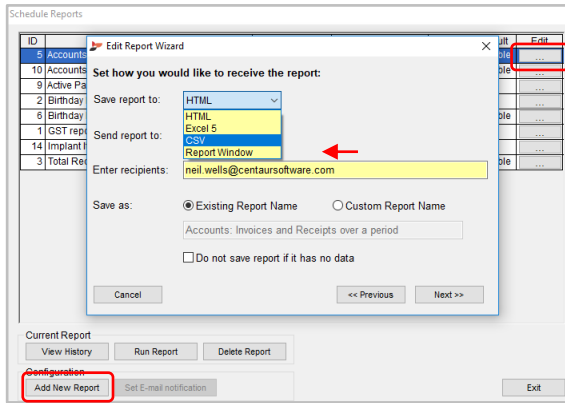
Name	Prv Date Last Seen	Item	Amount	Card No	Home Phone	Work Phone
Banks, Mr James	PM May 06, 2015	011	10.00	4		
Total			10.00			

6. Select type from the **Save as type** droplist



Automatically Run a Report

1. Go to **Location Management > Reports** tab
2. Select **Operations** menu > Select **Schedule Reports**
3. You can add a new report by clicking on **Add New Report** button or
4. Edit an existing scheduled report/s by clicking on the **Edit** button against each report
5. Move to the below window, then select from the **Save Report to** drop list



Please refer to the 'Schedule Reports' document from training@centaurssoftware.com

ENHANCEMENT: SMS Report and Message Details

The SMS Messaging Report has been enhanced to allow users to quickly and easily report on SMS communications with a patient.

Report Parameters

Report's parameters

Today From 28/02/2019 to 28/02/2019

Location My Practice

Provider 999 <All>

SMS type <All>

Show inactive providers as well

Show appointment details

Show message details Sent Message Sent Message and Replies

Filter by mobile:

1. Go to **Location Management > Report** tab
2. Double click on **SMS Messaging Report**
3. **Date Range:** Select the period to base this report on
4. **Location:** Select the location or <Any Location > from the droplist if applicable
5. **Provider:** Select the provider or <Any Provider > from the droplist
6. **SMS type:** Select the SMS type or <Any > from the droplist
7. **Show inactive providers as well:** Place a tick in the box if you wish to include an Inactive Provider
8. **Show appointment details:** Place a tick in the box to see the appointment date and time of SMS including patient details
9. **Show message details:** Place a tick in the box to select the following:
 - a. **Sent Message:** The report will show only details of the message sent
 - b. **Sent Message and Replies:** The report will show content from the message sent and received

10. **Filter by mobile:** Enter the mobile number to report on messages sent/received from a specific number. You can enter multiple mobile number by using “;” between the numbers. E.g., 0415000000;0415522222

11. Click **OK** button

Report Details

SMS Messaging report						
From 1/01/1000 to 19/02/2019		Filter by: 61415890090		Printed: 19/02/2019 08:42		
Page 1 of 1						
Papadopoulos, Dr Frank - 2				SMS Code: FP002		
Date / time sent	Patient details	SMS type	Mobile Number	Count	Message Text	Reply Text
13/02/2019 12:49:44	Wells, Mr Neil #00000032 Appt: WED 13/02/2019 03:30 pm	Appt book	61415890090	1	Hi Neil this is a reminder of your appointment with Dr Papadopoulos on 13.02.2019 at 15:30. Please reply Y to confirm.	
Sub-total for Papadopoulos, Dr Frank				1		
Papadopoulos, Dr Frank - FP				SMS Code: FP001		
Date / time sent	Patient details	SMS type	Mobile Number	Count	Message Text	Reply Text
3/12/2018 09:26:54	Wells, Mr Neil #00000032 Appt: TUE 04/12/2018 03:15 pm	Appt book	61415890090	1	Hi Neil, reminder of appt on 04.12.2018 Tue at 15:15 with DrPapadopoulos. Please reply Y to confirm or call 92135000.	<03/12/18 09:58:09> Yes

ENHANCEMENT: [Allow Check-in and Check-out while appointment book is locked](#)

This enhancement allows users to check the patient in/out while the Appointment Book is in use by another user.

ENHANCEMENT: [D4W Marketing](#)

Workflow enhancements have been developed to streamline the access, export and order process of D4W Marketing. For more information on D4W Marketing, please email sales@centaursoftware.com or call 1300 853 312.

1. Add Login Credentials to D4W

In order to use the single sign-on, users need to add their DMM Username and Password in D4W.

- i. Go to **Location Setup > General** tab
- ii. Select **Group: eMarketing**
- iii. Add practice **Portal Username**
- iv. Add practice **Password**

Portal Username	<input type="text"/>
Portal Password	<input type="password"/>

2. Single Sign-On from D4W

Single sign-on provides the user quick access from D4W to the D4W Marketing Centre through identifying the user when opening the site.

- i. Within D4W, select the **Go To** menu
- ii. Select **DMMi Portal**
- iii. The user is automatically logged in to the site