

Email from Report Wizard

24/07/2025 11:00 am BST

Summary

The Report Wizard tab can be accessed via the top menu by selecting Utilities > Reports and then selecting the Report Wizard Tab.

The Report Wizard screen is used to collate data from specified criteria. This data can then be exported to a spreadsheet, or used to communicate with registered clients.

For example, it could be an upcoming annual event such as Bonfire Night, and you may wish to send out a letter to all clients registered with some handy tips to reduce stress.

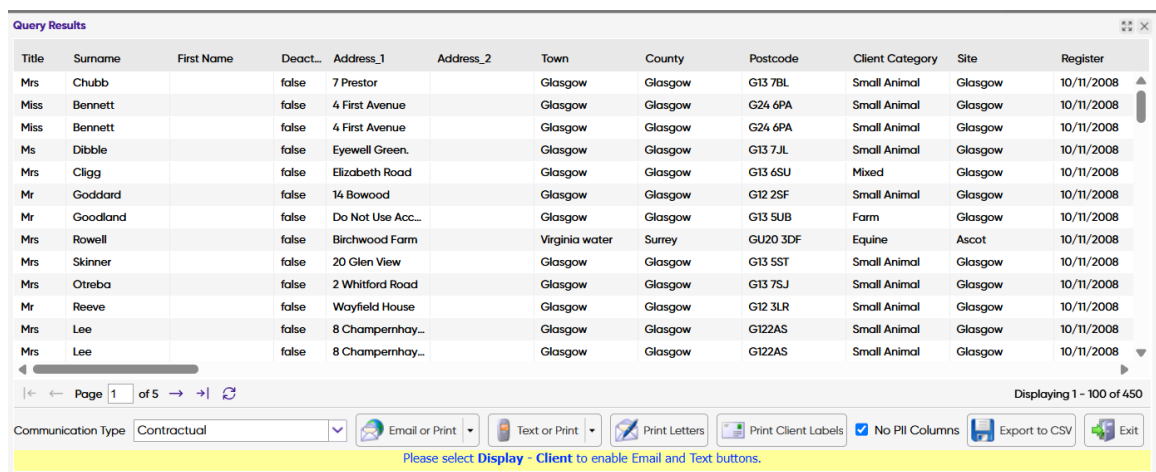
The clients who meet specified criteria can then be contacted by SMS and Email.

For further information see the [Report Wizard](#) page.

Details

Send Emails from Report Wizard

1. Once the report has been run, and your criteria results are displayed:
2. Select the arrow next to 'Email or Print'.



The screenshot shows a window titled "Query Results" with a table of client data. The table has columns for Title, Surname, First Name, Deact..., Address_1, Address_2, Town, County, Postcode, Client Category, Site, and Register. Below the table is a navigation bar with "Page 1 of 5" and several action buttons: "Email or Print", "Text or Print", "Print Letters", "Print Client Labels", "No PII Columns" (checked), "Export to CSV", and "Exit". A yellow banner at the bottom of the window reads "Please select Display - Client to enable Email and Text buttons."

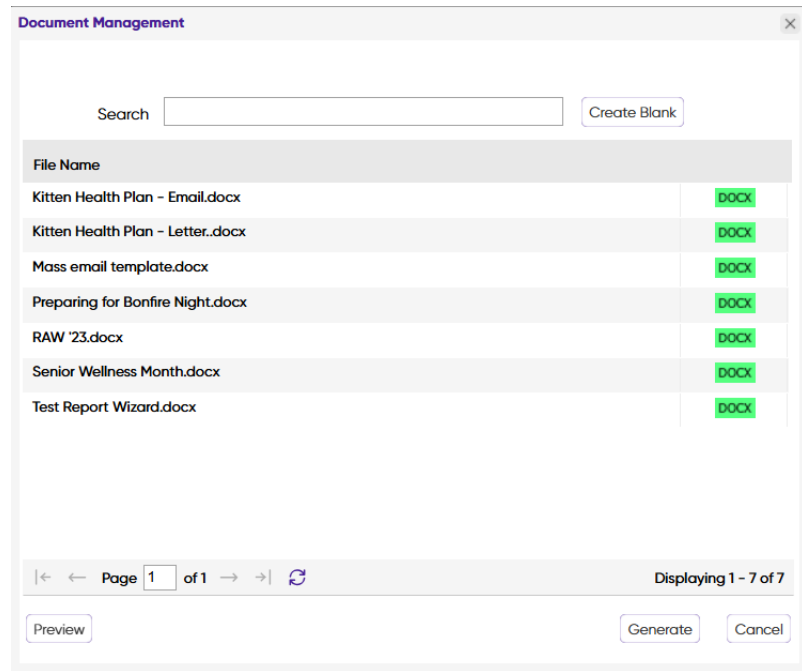
Title	Surname	First Name	Deact...	Address_1	Address_2	Town	County	Postcode	Client Category	Site	Register
Mrs	Chubb		false	7 Prestor		Glasgow	Glasgow	G13 7BL	Small Animal	Glasgow	10/11/2008
Miss	Bennett		false	4 First Avenue		Glasgow	Glasgow	G24 6PA	Small Animal	Glasgow	10/11/2008
Miss	Bennett		false	4 First Avenue		Glasgow	Glasgow	G24 6PA	Small Animal	Glasgow	10/11/2008
Ms	Dibble		false	Eyewell Green.		Glasgow	Glasgow	G13 7JL	Small Animal	Glasgow	10/11/2008
Mrs	Cligg		false	Elizabeth Road		Glasgow	Glasgow	G13 6SU	Mixed	Glasgow	10/11/2008
Mr	Goddard		false	14 Bowood		Glasgow	Glasgow	G12 2SF	Small Animal	Glasgow	10/11/2008
Mr	Goodland		false	Do Not Use Acc...		Glasgow	Glasgow	G13 SUB	Farm	Glasgow	10/11/2008
Mrs	Rowell		false	Birchwood Farm		Virginia water	Surrey	GU20 3DF	Equine	Ascot	10/11/2008
Mrs	Skinner		false	20 Glen View		Glasgow	Glasgow	G13 SST	Small Animal	Glasgow	10/11/2008
Mrs	Otreba		false	2 Whitford Road		Glasgow	Glasgow	G13 7SJ	Small Animal	Glasgow	10/11/2008
Mr	Reeve		false	Wayfield House		Glasgow	Glasgow	G12 3LR	Small Animal	Glasgow	10/11/2008
Mrs	Lee		false	8 Champemhay...		Glasgow	Glasgow	G122AS	Small Animal	Glasgow	10/11/2008
Mrs	Lee		false	8 Champemhay...		Glasgow	Glasgow	G122AS	Small Animal	Glasgow	10/11/2008

Email Only = Send email to all clients with a registered email, ignoring all clients with no email address registered.

Email & Generate Letter for Missing = For clients with no registered email, generate a document to print and post out.

Remember to set the appropriate communication type from the drop down depending on the communication you are sending.

3. After selecting an option, the below window will appear. Select the template required and select 'Generate'.



Note: As soon as the user clicks 'Generate', the communication being sent will begin.

4. The document will then emailed to all eligible clients and an audit trail will be stored in their Communication Tab in the Reception screen.

