

SUNiX



Marketing / Newsletter

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Marketing / Newsletter

Under Patient - Create Newsletter List:

Beginning letters can be used, e.g. putting “B” in “Spec Lens Code” will give you all patients who had Spec Lens Code that began with B.

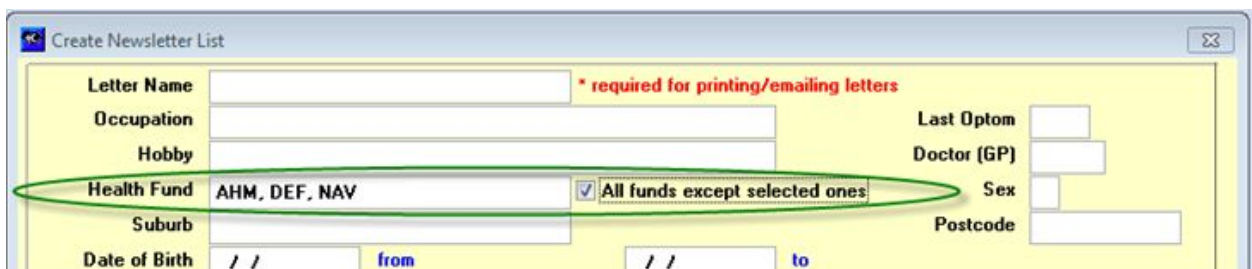
The “**Date**” field or “**Patient History, Code & Lens Code Date**” is used for:

Date	/ /	from	/ /	to			
Patient History		&		&		&	
Patient Code		&		&		&	
Spec Lens Code			Frame Group		Frame Brand		
CL Code			Spending Over \$				
Sphere From		e.g. -4.00	to		e.g. +4.00		
Cyl From		e.g. -2.00	to		e.g. 0.00		

An **asterisk** * can be used use as a wild card for the following fields:

- o Spec Lens Code
- o CL Code
- o Health Fund

If you want **all health funds except a few**, then you put in the ones you want to exclude and tick the “**All funds except selected ones**” box e.g.



The screenshot shows a window titled "Create Newsletter List" with various input fields. The "Health Fund" field contains the text "AHM, DEF, NAV" and a checkbox labeled "All funds except selected ones" is checked. A green oval highlights the "Health Fund" field and the checkbox. Other fields include "Letter Name", "Occupation", "Hobby", "Suburb", "Date of Birth", "Last Optom", "Doctor (GP)", "Sex", and "Postcode".

An **exclamation mark** ! can be put in front as an exclusion in the following fields:

- o Patient History
- o Patient Code



Date of Birth is entered from early date to newer date, e.g. from 01/01/1990 to 31/12/2000

If you want to filter by **Birthday**, just enter day and month (without the year) e.g. 01/01/ to 31/01/

By **default**, only patients with correct street address will come up in the list, unless you tick the box "**Include Patients with Incorrect Addr**", e.g. if you are going to email.

Conditions:

- o "**And**" condition

Multiple filters can be entered at the same time. For example, if you enter * in both Spec Lens Code and CL Code, only patients with both Spec Lens and CL will come up in the list

- o "**Or**" condition

- o If you want patients with either Spec Lens or CL, you create a list with the Spec Lens Code first. Then create again with CL and tick "Add to Existing List"

"Only Include Patients with Email Address" can be used if you *only want emailing but not printing at all*. But if you want to *email first and then print letters to the remaining one that did not get email*, do **NOT** tick the "**Only Include Patients with Email Address**". After the list is created, click Email and it would email only to the ones that have an Email address. Once emailed, those patients will be flagged Email in the list. Then you click Print, and it will print only the remaining ones that still have "No" in the first "Printed" column.

If you want Vision to print/email the Newsletter, the "Letter Name" must be entered at the time you create the list.

Under Patient - Edit Newsletter List:

Once the Newsletter List is created, you can click onto:

- the "Print" button to print,
- the "Email" button to email,
- the "SMS" button to send SMS,
- the "Export" button to export the list, Newslet.csv, to the **Export** sub-folder of V2K or the folder of your SUNIX Vision program,
- the "Export to Email" button to email the exported list
- the "Campaign" button to open Campaign Monitor and export the list in the Campaign Monitor format.