



Monitor Client Quality

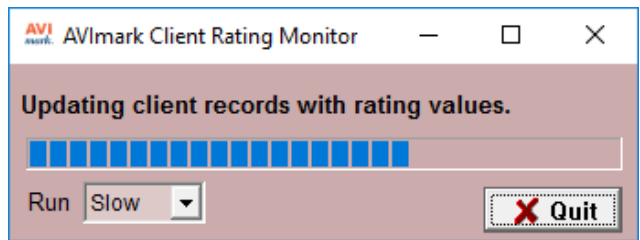


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Monitor Client Quality

AVImark can now automatically monitor client sales activity and assign rating values as well as display the number of visits for each client during the last 12 months.

To have AVImark calculate status values for your clients and display the number of fiscal visits for each client, you will need to select the new option **Monitor Client Quality** within **Work with | Hospital Setup | Miscellaneous tab** (also on Advanced tab | Advanced Options). Once this option is checked, the next time AVImark is opened on any computer, a RatingClients utility will automatically begin to run on that computer. This utility will automatically minimize itself and run in the background, possibly for several hours. A picture of the RatingClients utility is shown below.



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- There are three speeds that this utility can run; Slow, Medium, and Fast. The utility will default to the slow speed, but can be changed by clicking the Run drop-down list and selecting a speed.

Once the RatingClients utility is finished running, clients that are in the top 90% will be displayed with stars next to their names. The number of stars that are displayed will reflect the quality status of that client. Five stars will reflect top 10-20%; four stars, top 30-40%; three stars, top 50-60%; two stars, top 70-80%; and one star, top 90% or higher.

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- The rating of each client is determined by the dollar amount spent (charges, NOT payments) by each client during the last 12 months. This utility will also include clients who have been marked inactive or bad credit from the I or X code assigned to them. If someone comes in and incurs a lot of charges and never makes a payment could potentially be marked as a 5 star client. To avoid this, you should go to each client and manually change the Quality field from a 5 to a 0 and check the Set box so it will hold and not change the next time the RatingClients utility runs again.

The number of visits that is calculated for each client will be displayed to the right of the quality status stars. This number is determined by the number of invoices in the client's accounting for the last 12 months.

These values, quality status and number of fiscal visits, will be recalculated every ten days, as long as the Monitor Client Quality option in Hospital Setup is checked. When AVImark is first opened on the eleventh day, the RatingClients utility will again automatically recalculate the quality status for each client.

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- If, for some reason, the RatingClients utility is interrupted or you wish to run it before the eleventh day auto run, with the Hospital Setup | Miscellaneous tab | Monitor Client Quality option checked, you can manually run the utility by going to Applications | RatingClients.

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- If you don't have the option "Monitor client quality" checked in Hospital Setup and then you run the utility program "RatingClients", it will rate the client and put a number in the change client information area, but it won't assign any stars to the top of the CID screen.

The quality value for a client can also be set manually. To set a client's quality, simply enter a number from 1 to 10 (10 being the highest) in the Rating field of the Change Client Information window. When a client's quality rating is set manually, that client's quality value will not be updated by the RatingClients utility.

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- If a client's quality has been set manually, and you wish to have the RatingClients utility set the appropriate value for that client, simply uncheck the "Set" box within the Change Client Information window. When the eleventh day rolls around, that client's value will be reset.