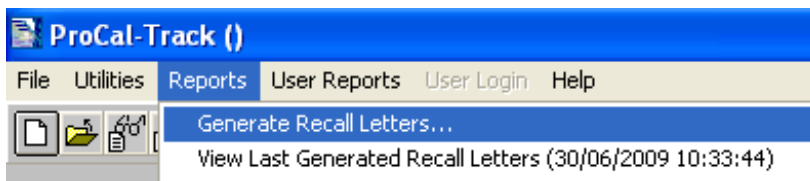## PROCAL-TRACK INSTRUMENT RECALL FUNCTION OVERVIEW

The new version of ProCal-Track offers an enhanced instrument recall function, which integrates with *Crystal Reports* to provide a fully customisable letter format.
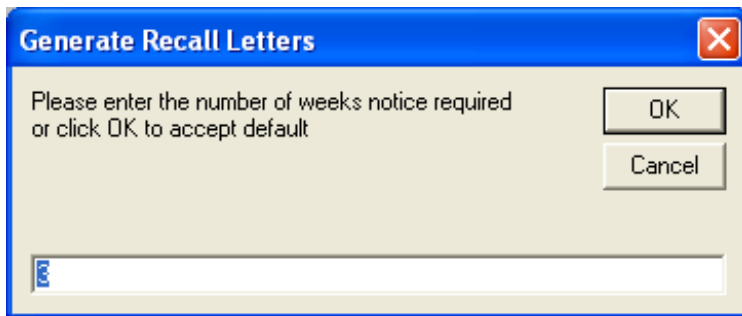
The recall function now offers a more flexible approach to maintaining instrument recalls, allowing the letters to be previewed on screen and also to be reprinted at any time between the current recall session and subsequent sessions.
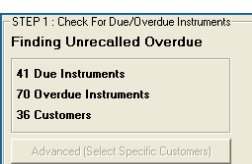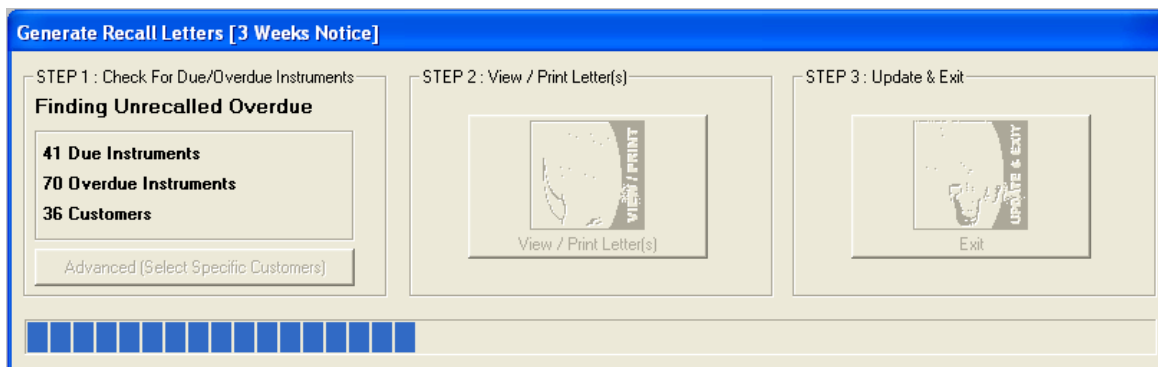
STEP 1 : RUNNING THE INSTRUMENT RECALL FUNCTION

The instrument recall function is started using the Reports -> Generate Recall Letters… menu item :

ProCal-Track will ask the user for a number of weeks notice required – the default setting is 3 weeks notice :
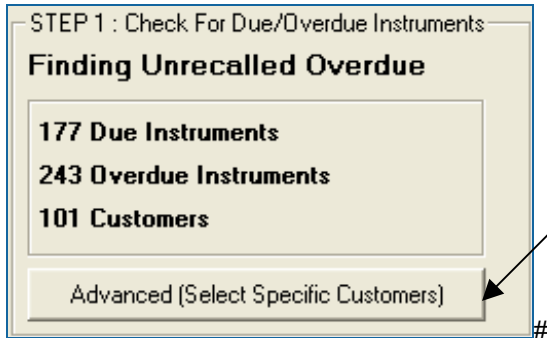

The main recall function screen will be now be displayed – the instrument database will be examined to determine instruments which require recall – this includes both DUE instruments and OVERDUE instruments – this may take a few minutes depending on the database size :
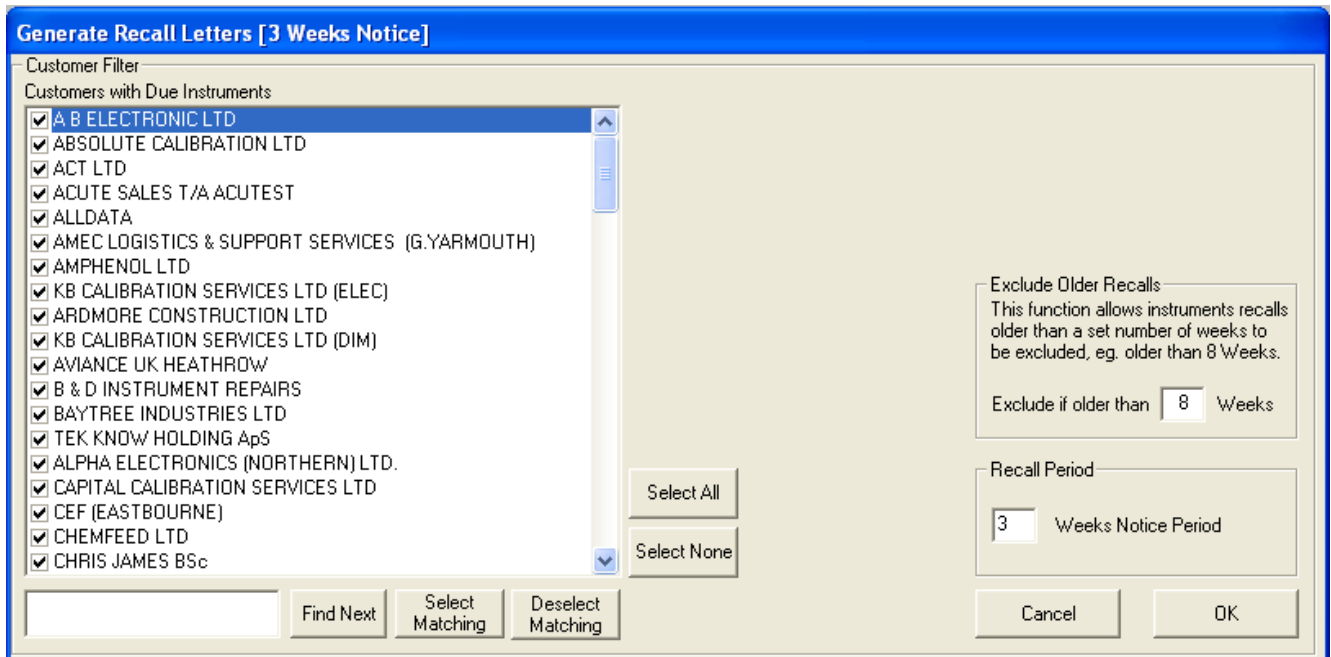

STEP 1 of the screen displays the number of **DUE** instruments, **OVERDUE** instruments and the total number of **CUSTOMERS** - a progress bar at the bottom of the screen show the progress. through the instrument database

REFINING THE LIST OF CUSTOMERS

The list of customers determined during the initial search for **DUE** and **OVERDUE** instruments can be refined if required by clicking on the **Advanced (Select Specific Customers)** button :

This will display the customer select screen and advanced options :

To refine the customers to include in the list of recall letters, simply deselect any not required using the tick to the left of the name (for example, you may wish to exclude international customers).

Click on the OK button to re-run the database scan including only the customers selected
(this may take a few minutes)

Advanced Options

This function allows instruments to be excluded from the check if the recalibration date is older than a user defined number of weeks.

This is useful when running the recall function for the first time on an existing database to ensure older calibrations are not requested.

Exclude Older Recalls
This function allows instruments recalls older than a set number of weeks to be excluded, eg. older than 8 Weeks.

Exclude if older than **8** Weeks

The default recall period in weeks can be defined by the user here.

This number is the number of weeks notice a customer will be given that their instrument(s) are due for calibration.

Recall Period

3 Weeks Notice Period

STEP 2 : PREVIEWING & PRINTING THE DUE/OVERDUW LETTERS

STEP 2 : View / Print Letter(s)

VIEW / PRINT

View / Print Letter(s)

The new instrument recall system is designed with efficiency in mind, and the new letter design includes both DUE and OVERDUE notices on the same letter. This saves on paper and provides a concise report for the customer.

For instruments which have been sub-contracted to you from other laboratories, the recall letter will also detail their clients name so they may contact them directly :

Laboratory Address

Customer Address
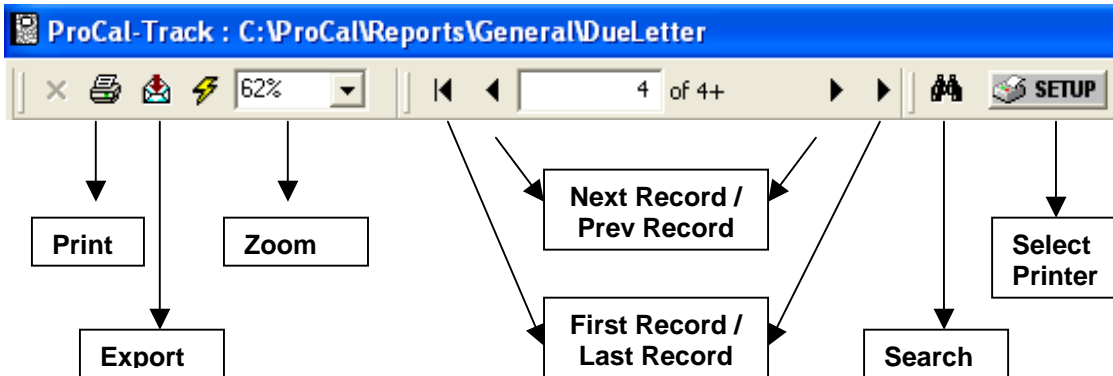**(with return laboratory address)**

Letter text – this can be edited as required using Crystal Reports

List of OVERDUE instruments (if any)Includes full description, serial number and calibration due date.
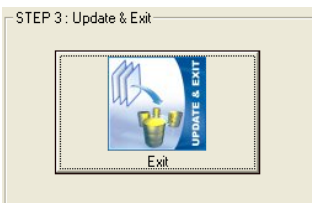
List of DUE instruments (if any) Includes full description, serial number and calibration due date.

The report template is named **DueLetter.rpt** and is located in the **ProCal/Reports/General** folder.

The controls at the top of the Crystal Report Preview Screen can be used to select which printer to use and which letters to print, although it is normal to print all letters unless a customer has asked for a reprint of their current recall letter.
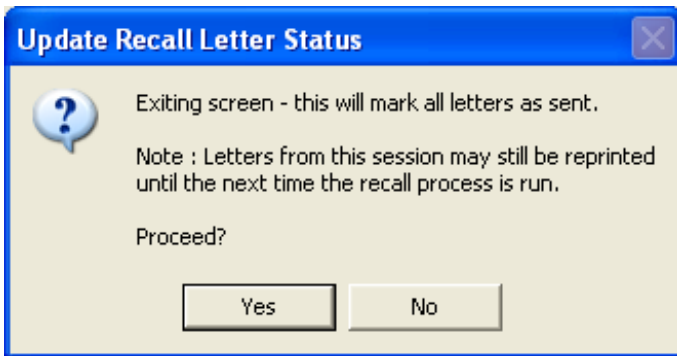

STEP 3 : UPDATE & EXIT

The final step after letters have been printed is to update the instruments which have been recalled to 'posted' –
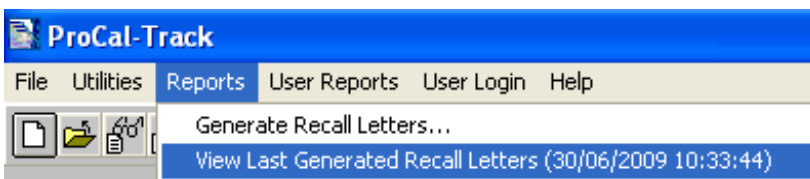this ensures letters are not duplicated.

Clicking on UPDATE & EXIT will display the following message :

Click YES to update instruments and close the close recall function screen – this will show a progress bar whilst updating the database.

The message also indicates that recall letters from the this session may still be displayed and printed at any time until the next session (i.e. The next time the recall function is run)

This can be done at any time by accessing the Reports menu :

This menu item allows the last generated recall letters to be previewed on screen and printed – ideal if one or more letters are require to be printed after the recall function has been run.