# FRED.OFFICE

# CREATE CUSTOMER AND ACCOUNT FROM FRED DISPENSE

Last Updated: Thursday, 18 June 2009

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## *Summary*

"Customers" and "Accounts" can be created directly from Fred Dispense, which automatically links the "Patient". This document explains how to do this.

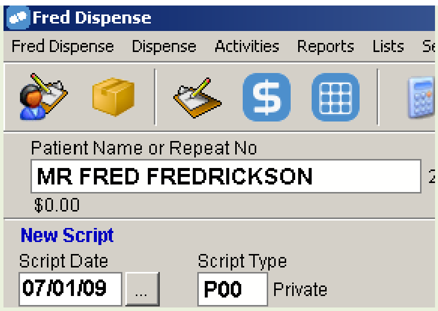
Notes to remember:

- "Customer" must exist before an "Account" can be created
- The "Patient" must be linked to the "Customer" to autocharge onto the "Accounts"
- There are four "account types" available; Personal, TAC, Work cover and Other

## *Details*

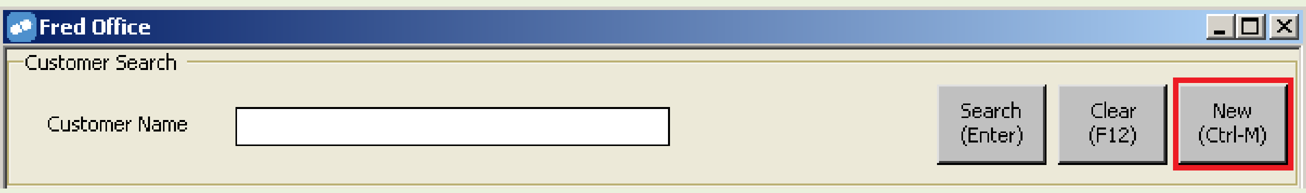
NOTE: This how to assumes you will create a "Personal" account type.

- Search for and select the patient in Fred Dispense.




- Click the "Fred Debtors" icon. **<F6>**

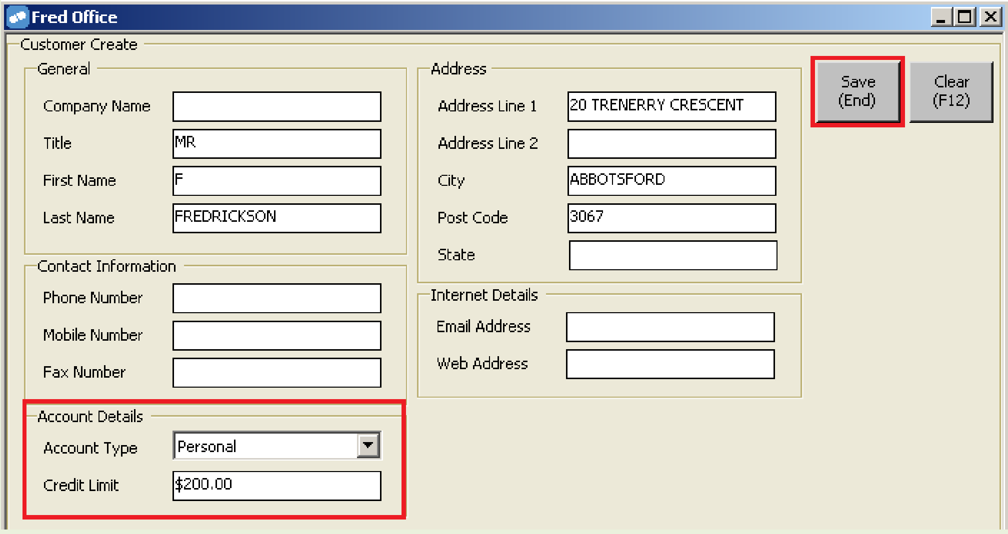

- Click "New". **<CTRL + M>**



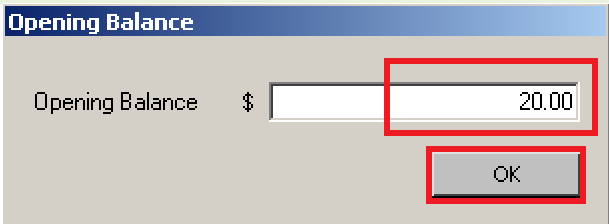
- Adjust the default credit limit (if required) by overtyping.

  *The pull down next to “Account Type” can be used if you wished to create an Other, TAC or Workcover account type instead of Personal.

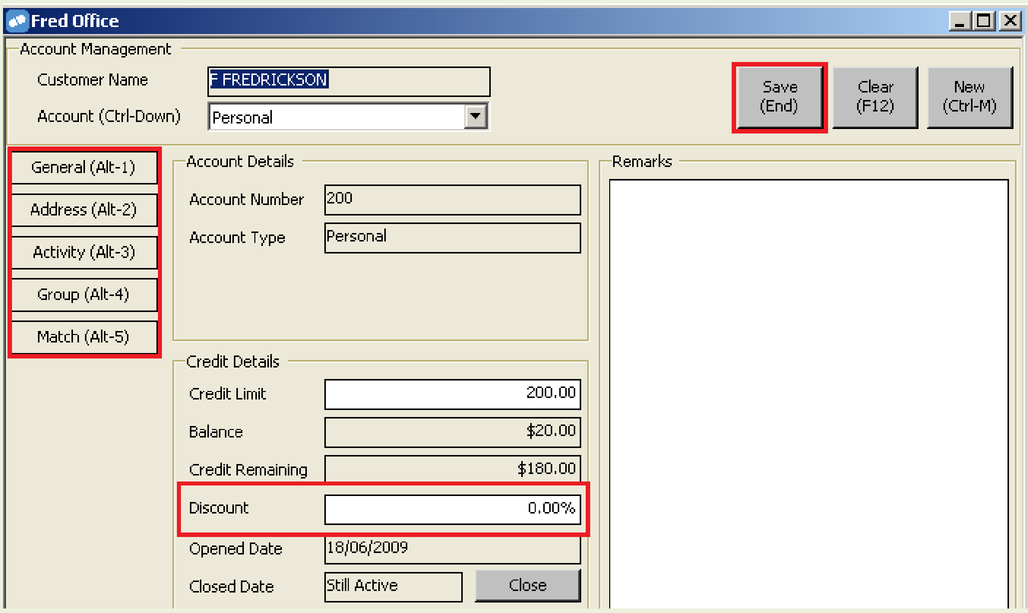
- Click “Save” **<END>**




- Enter the “Opening Balance”.
- Click “OK”. **<ENTER>**




- From here you can navigate the various tabs and update information as required.




- Press **<ESC>** to return to dispensing.

## *Keywords*
Fred Office; Fred Dispense; Account; Customer, Debtors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