

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

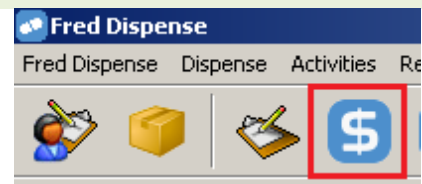
Details

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

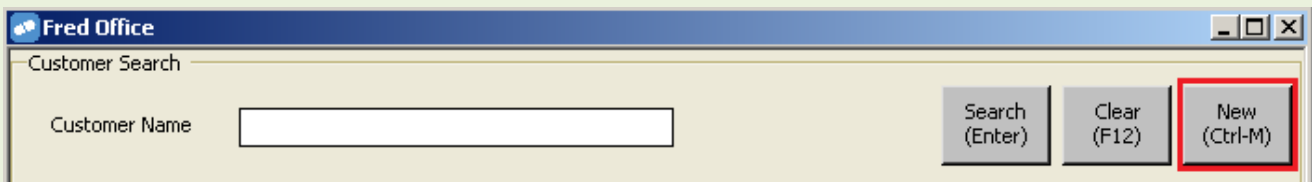
- Search for and select the patient in Fred Dispense.



- 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>**

The screenshot shows the 'Fred Office' 'Customer Create' window. It has several sections: 'General' (Company Name, Title, First Name, Last Name), 'Address' (Address Line 1, Address Line 2, City, Post Code, State), 'Contact Information' (Phone Number, Mobile Number, Fax Number), 'Internet Details' (Email Address, Web Address), and 'Account Details' (Account Type, Credit Limit). The 'Account Details' section is highlighted with a red box, showing 'Account Type' as 'Personal' and 'Credit Limit' as '\$200.00'. The 'Save (End)' button is also highlighted with a red box.

- Enter the "Opening Balance".

- Click "OK". **<ENTER>**

The screenshot shows the 'Opening Balance' dialog box. It has a single input field for 'Opening Balance' with a dollar sign, containing the value '20.00'. The 'OK' button is highlighted with a red box.

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

The screenshot shows the 'Fred Office' 'Account Management' window. It has a 'Customer Name' field with 'F FREDRICKSON' and an 'Account (Ctrl-Down)' dropdown set to 'Personal'. There are three buttons: 'Save (End)', 'Clear (F12)', and 'New (Ctrl-M)'. The 'General (Alt-1)' tab is highlighted with a red box. The 'Account Details' section includes 'Account Number' (200) and 'Account Type' (Personal). The 'Credit Details' section includes 'Credit Limit' (200.00), 'Balance' (\$20.00), 'Credit Remaining' (\$180.00), and 'Discount' (0.00%), which is highlighted with a red box. The 'Opened Date' is 18/06/2009 and the 'Closed Date' is 'Still Active'. There is a 'Close' button.

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

Keywords

Fred Office; Fred Dispense; Account; Customer, Debtors



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