

CREATE SECOND ACCOUNT TYPE 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”.

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

This document explains how a second account type can be created from Fred Dispense.

Details

NOTE: This how to assumes this Patient is already linked to a “Customer” with a “Personal” account type.

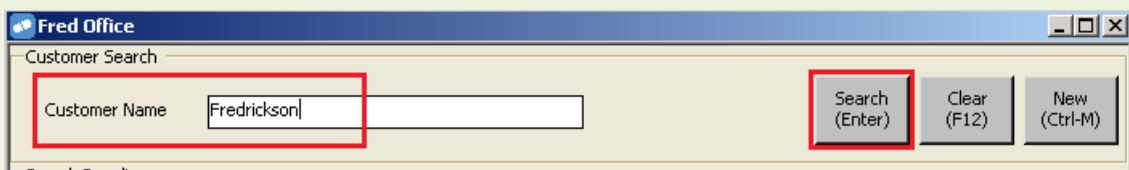
- Search for and select the patient in Fred Dispense.



- Click the “Fred Debtors” icon. **<F6>**



- Type the customer’s name.
- Click “Search” **<ENTER>**.



- Select the customer from the search results.

QK	Title	First Name	Last Name	Comp
A	Mr	Fred	Fredrickson	
B	Mr	Fred	Fredrickson	

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

*This will use the patient details to create the customer.

- Select the account type from those available.

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

QK	Name
A	TAC
B	W/C
C	Other

- Enter the "Opening Balance".

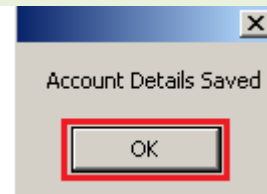
- Click "OK". **<ENTER>**

- Adjust the default credit limit (if required) by overtyping.
- Set the account discount (if required) by overtyping.
- Click “Save” **<END>**

The screenshot shows the 'Fred Office' window with the following details:

- Account Management:** Customer Name: Fred Fredrickson; Account (Ctrl-Down): Other. Buttons: Save (End) [highlighted], Clear (F12), New (Ctrl-M).
- Account Details:** Account Number: 199; Account Type: Other.
- Credit Details:** Credit Limit: 200.00; Balance: \$20.00; Credit Remaining: \$180.00; Discount: 0.00% [highlighted]; Opened Date: 18/06/2009; Closed Date: Still Active. Button: Close.
- Remarks:** Empty text area.
- Navigation:** General (Alt-1), Address (Alt-2), Activity (Alt-3), Group (Alt-4), Match (Alt-5).

- Click “OK” **<ENTER>>**



Keywords

Fred Office; Fred Dispense; Account; Customer, Debtors

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