

LINK PATIENT TO EXISTING CUSTOMER AND ACCOUNT FROM FRED DISPENSE

Last Updated: Friday, 19 June 2009

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Summary

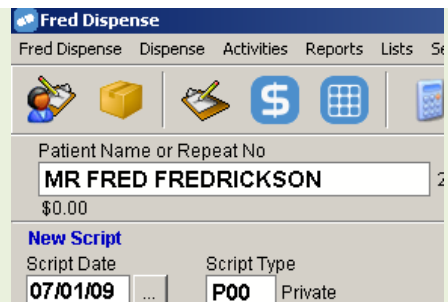
“Customers” and “Accounts” can be created directly from Fred Dispense, which automatically links the “Patient”. This document explains how to link a patient to an existing “Customer” (and its associated “Accounts”).

Notes to remember:

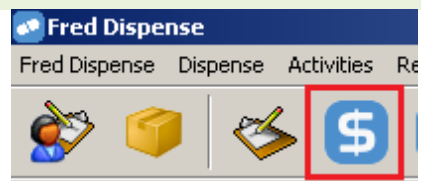
- “Customer” must exist before an “Account” can be created
- The “Patient” must be linked to the “Customer” to autocharge onto the “Accounts”
- There are four “account types” available; Personal, TAC, Work cover and Other

Details

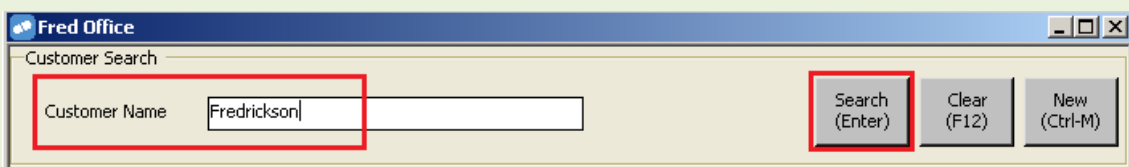
- Search for and select the patient in Fred Dispense.



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



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



- Select the customer from the search results.

Fred Office

Customer Search

Customer Name: Fredrickson

Search Result

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

- Click “Match” **<ALT 5>**
- Click “Add”.

Fred Office

Account Management

Customer Name: F FREDRICKSON

Account (Ctrl-Down): Personal

Buttons: Save (End), Clear (F12), New (Ctrl-M)

General (Alt-1), Address (Alt-2), Activity (Alt-3), Group (Alt-4), **Match (Alt-5)**

Patient Matching

Patient	Title	First Name	Last Name	Family Code
36347	MR	F	FREDRICKSON	0

Buttons: Add, Remove

- Type the patient’s name.
- Click “Search” **<ENTER>**.
- Select the patient from the search results.

Patient Selection

Patient Name: fredrickson

Buttons: Search (Enter), Clear (F12)

Patient List

QK	Patient Number	Title	First Name	Last Name	Family Code
A	36345	MR	FRED	FREDRICKSON	0
B	36348	MS	F	FREDRICKSON	0

- Close the window.

Patient Selection

Patient Name: fredrickson

Buttons: Search (Enter), Clear (F12)

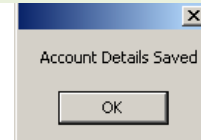
Close button (X) highlighted.

- Click "Save" <END>

The screenshot shows the 'Fred Office' application window. The 'Account Management' section includes a 'Customer Name' field with 'F FREDRICKSON' and an 'Account (Ctrl-Down)' dropdown menu set to 'Personal'. To the right are three buttons: 'Save (End)' (highlighted with a red box), 'Clear (F12)', and 'New (Ctrl-M)'. Below this is a 'Patient Matching' section with a table and two buttons: 'Add' and 'Remove'.

Patient	Title	First Name	Last Name	Family Code
36347	MR	F	FREDRICKSON	0
36348	MS	F	FREDRICKSON	0

- Click "OK" <ENTER>>



Keywords

Fred Office; Fred Dispense; Account; Customer, Debtors

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