



Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide Corporate Clients

Contents

Introduction 3

Adding a New Corporate Client 4

Managing Corporate Clients..... 8

Introduction

"Corporate" allows you to add patients to companies and groups. Whether they just get help towards the cost of the eye care or have everything paid for them, Corporate facilities exist throughout FLEX to help you manage these clients.

Corporate is found under Menu - Setup - Till - Corporate. The first screen you see is shown below.

Corporate Types: Descriptions of the types of corporate clients you have.

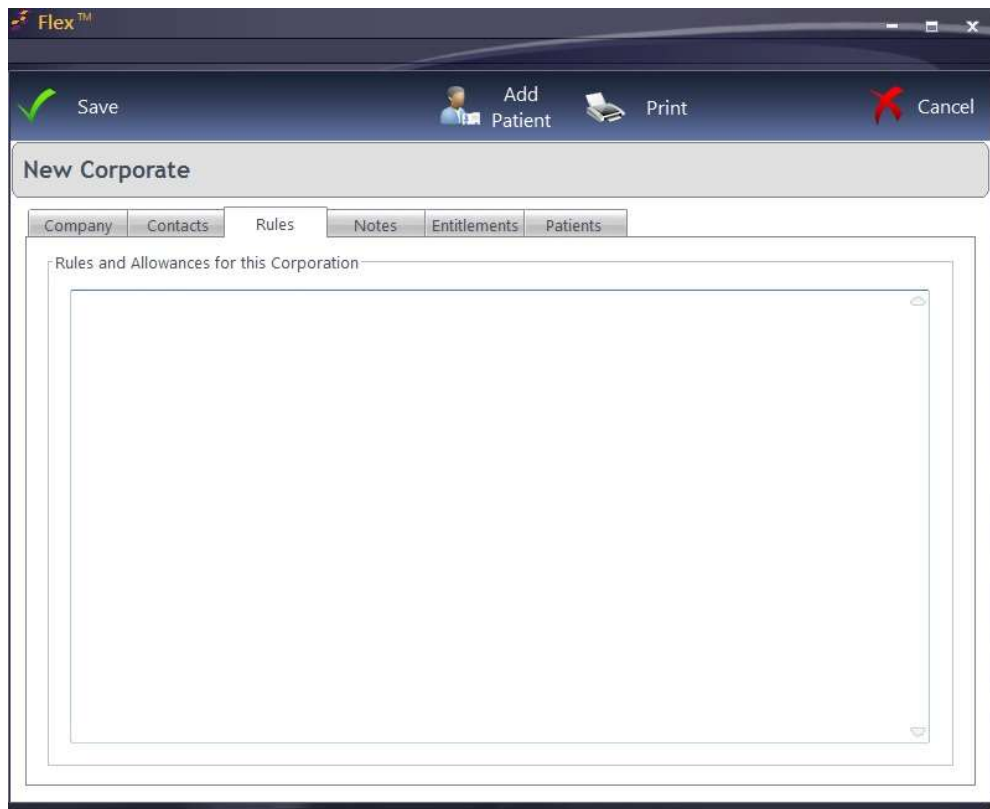
Corporation Details: All the information you would need for each client.

Adding a New Corporate Client

Press the **New** button on the Corporate screen. Note the **Update** button brings up the same window (albeit with details to amend, not start afresh).

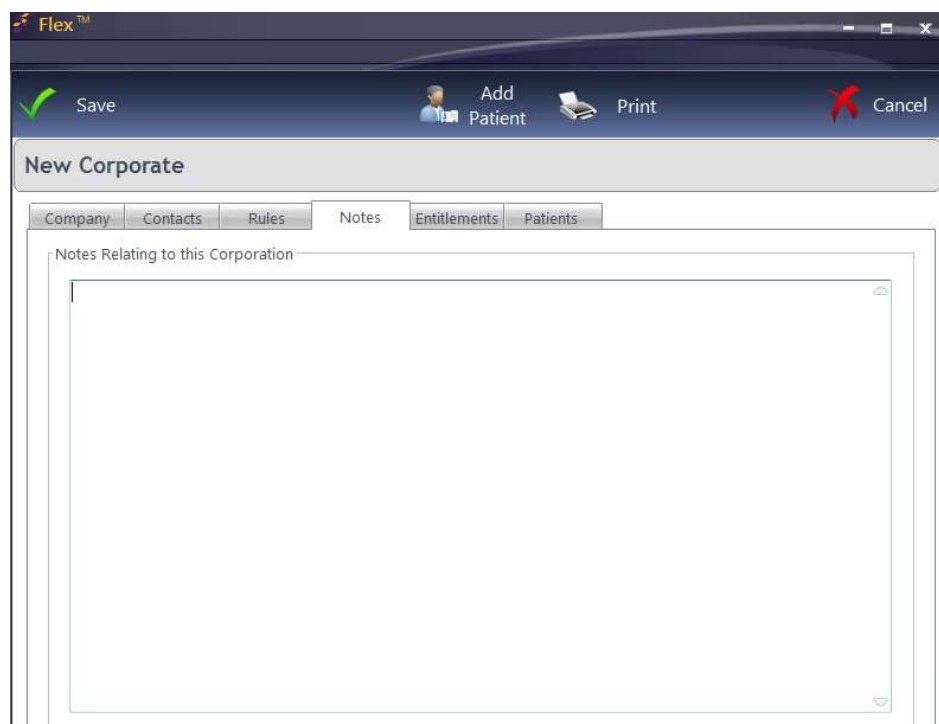
Add all the relevant **Contact Details**, **Billing Details** and **Additional Details**. Check the relevant boxes for which **Options** apply.

In the second screen, **Contacts at the Company** and **Contact Details for the Contact** are added. Click into a new row to add details.



The screenshot shows the 'New Corporate' window in the Flex TM application. The window has a dark blue header bar with the 'Flex TM' logo on the left and three buttons on the right: 'Save' (with a green checkmark icon), 'Add Patient' (with a person icon), and 'Print' (with a printer icon). Below the header bar is a tabbed interface with tabs for 'Company', 'Contacts', 'Rules', 'Notes', 'Entitlements', and 'Patients'. The 'Rules' tab is currently selected. The main content area of the 'Rules' tab is titled 'Rules and Allowances for this Corporation' and contains a large, empty white rectangular box for text entry.

Rules and Allowances can be entered as free text.



The screenshot shows the 'New Corporate' window in the Flex TM application, with the 'Notes' tab selected. The window structure is identical to the previous screenshot, with the same header bar and tabbed interface. The 'Notes' tab is active, and its main content area is titled 'Notes Relating to this Corporation'. It contains a large, empty white rectangular box for text entry.

Notes can also be entered as free text.

Flex™

Save Add Patient Print Cancel

New Corporate

Company Contacts Rules Notes Entitlements Patients

Entitlements available for use by patients of this Corporation

Description	Amount	Percent	Sales Group

Entitlements can be entered, with the final column being a drop down of the relevant **Sales Group** for an item.

The final screen shows patients currently assigned to the Corporate, under **Patients that are entitled to the benefits of this Corporation**.

To add a Patient, press **Add Patient** at the top of the screen. Patients can also be added and removed under the "**Other Actions**" menu in the Patient record.

When you have finished, press **Save**.

Shown below is the second tab of the Corporate window.

Flex
Logged in as Optinet Staff Member Branch: Malvern (ID: 1) Version: 1.3.93.7 SMS & Email Notifications: DISABLED

Home Mgr. Home New Corporate Update Corporate Print

Branch
Staff / Roles
Patients
Examinations
Schemes
Appointments
Orders
Stock
Communication
Till
Corporate
General
System

Till Setup - Corporate

Corporations Payments / Contact

Payment Schedules

ID	Method Description
1	
2	Monthly Invoice
3	Employee Pays

Contact Types

Contact Type Description
Telephone
Direct Dial
Mobile
Email
Fax

Contact (Area of Responsibility)

ID	Contact Type Description
1	Primary
2	Billing

Wherever there is a drop-down menu, the entries in it are customisable. The options in Corporate (by default) are shown above.

Payment Schedules: The frequency the corporate client pays.

Contact Type: How corporate clients can be contacted in the "Contacts" screen.

Contact (Area of Responsibility): For example Primary, Billing...

Managing Corporate Clients

The Corporate Module is mostly managed through Menu - Setup - Till - Corporate. This page summarises where else it is used.

As a Payment Method:

If Corporate payments are being taken, **Corporate** should appear as a Payment Method in the Payment Methods table, and the Corporate box should be ticked. When buttons relating to this payment method are clicked on the Till, only patients assigned to a Corporate Client can pay using this method.

As part of a Dispense:

The Dispensing module has a pop-up window showing Corporate contributions available / the rules for the client

In the Patient Record:

Patients can be assigned to (and removed from) a Corporate. To do this, click onto **Update** and **Other Actions**. Choose "**Assign to Corporate**". The following box appears:



Pick the client and press **Select**. To remove, click onto **Update** and **Other Actions**. Choose "**Remove from Corporate**". Note that this option is always called "Assign to a Corporate" unless they have already been assigned to one.

The reporting for Corporate is under Business Intelligence – General Reports

Choose Corporate, your date range and press the large green button. It will ask which Corporate Client you wish to report for, then open up like other reports do.

