

The Application Tree



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This page shows a tree-style layout of the program which can act as a map for those looking for a specific area or those who want to get a broad overview of the application.



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Customers

- **Information** - Manage all aspects of the highly detailed Customer profiles.
- **Documents** - Attachments of any file, completed forms or letters.
- **Estimations** - Estimations are saved and can be used for direct invoicing.
- **Charges** - Manage invoices, credits or counter sales (non-patient associated billing).
- **Payments** - Manage payments, receipting and refunds.
- **Accounts** - Summarise all Charges and Payments. View statement history. Alter accounts (if you have the correct permissions).

Patients

- **Information** - Manage all aspects of the Patient profile (eg.Account types, contacts, billing types, etc).
- **Medical Records** - Allows management of case records, problem based histories, reminders, alerts, investigations (eg. lab results) and attachments (images, documents or files).

Supplier

Workflow

- **Work Lists** - Contains lists of tasks relating to a particular Patient. eg. Consultations in a Waiting Room List)
- **Messaging** - Allows messages relating to a patient to be left for other users.
- **Investigations** - Lab results, digital imaging imaging studies and other scheduled tests are managed here.
- **Scheduling** - Date-based lists for appointments.

Financial

- **Till Balancing** - Tools for clearing and balancing the Till(s). Previous balances can be examined in detail.
- **Deposits** - Till balances can be deposited to any number of accounts which are managed here. Deposit slips for banking can be generated.
- **Statements** - Statement runs are managed through a useful interface that allow the statement run to be examined prior to generating.

Products

- **Inventory** - To be completed in Version 2.
- **Information** - Considerable detail

<ul style="list-style-type: none"> ◦ Information - Manage the supplier profile. Apart from contact and billing details, suppliers can also be associated with specific products they might supply. ◦ Documents - Attach any type of file, completed forms or letters. ◦ Orders - Currently allows generation of invoice style orders using the product database. These orders can then issued using pre-existing templates. <ul style="list-style-type: none"> - This area is an area under heavy development for Version 2. ◦ Charges - Manage invoices or credits. ◦ Payments - Manage payments, receipting and refunds. ◦ Account - Summarise all Charges and Payments. View statement history. Alter accounts if you have the correct permissions. 	<p>beyond just pricing information can be stored in the Product profiles which are managed here.</p> <ul style="list-style-type: none"> • <p>Reporting</p> <ul style="list-style-type: none"> ◦ Patient Reminders - Reminder runs with capacity for various posting methods is managed from a similar rich interface as statements. ◦ Reports - Running reports and report results are accessed here. <ul style="list-style-type: none"> • <p>Administration</p> <ul style="list-style-type: none"> ◦ Organisation - Organisations are entities such as Deposit Accounts, Schedules, Practice Locations, etc. <ul style="list-style-type: none"> - Organisation objects are what allows the program to be uniquely configured for each different practice. ◦ Types - Types are special lists which relate to the organisation objects. Examples include; Appointment types (Schedules), Product types, Reminder types and Task types (Worklists). ◦ Templates - All documents created the various Document workspaces (ie. Customer, Patients) are based on templates which can be customized here. ◦ Lookups - The contents of the various List Boxes are managed here, allowing addition of new items and entries.