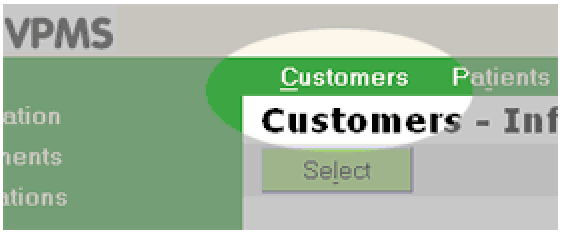
This page last changed on Nov 27, 2006 by mcosta.

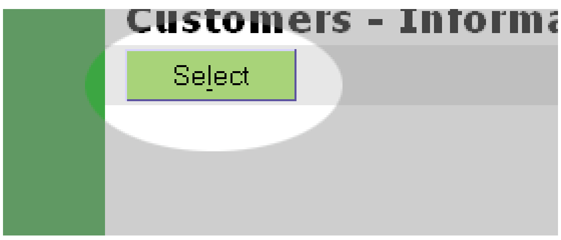
The Customer Module

This is a guide to the workspaces found within the Customer module.

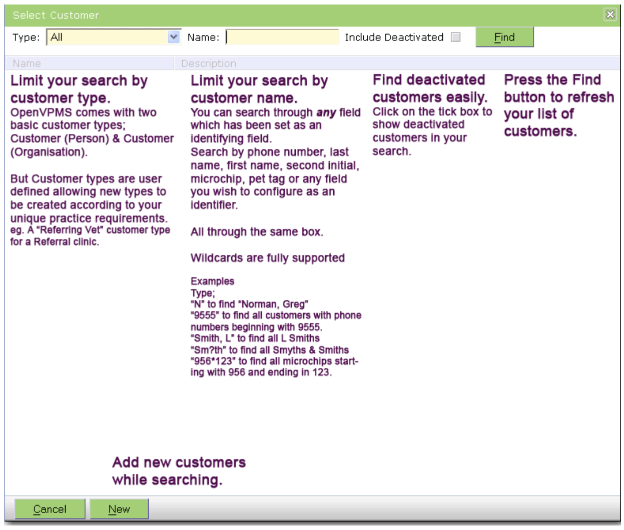
Finding the Customer Module

The Customer module is the first of the modules (left to right) listed across the top bar of the application. Click on the word **"Customers"** to bring up the current workspace. If this is the first time you have visited the Customers module, the Information workspace is showed be default.	

Selecting a Customer

To select or find a customer click on the **SELECT** button just below Customers. After you click on the **SELECT** button the Select Customer dialog will open.	

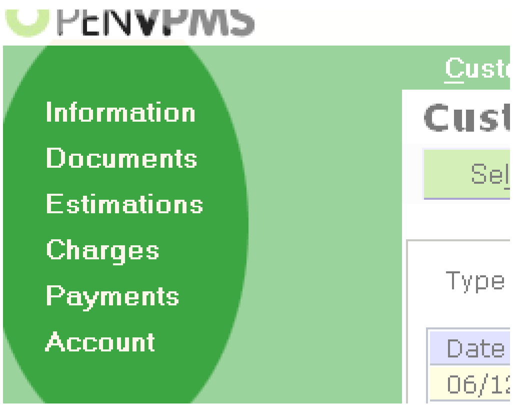
The Select Customer Dialog



If this the first time to Customers, there won't be a customer selected (screen will be blank except for **SELECT** and **NEW** buttons). If you have been in Customers before or if you have selected a **"Patient"** in the Patients module, then an associated Customer will be shown.

Click here for a Step-by-Step demonstration of looking up a customer.

The Customer Workspaces



We will look at each of the workspaces in turn.

- **Information- Contains the Customers details.**
- **Documents- Contains any linked documents for the customer (eg. Letters)**
- **Estimations- Contains estimations generated for the customer.**

• **Charges- Contains invoices, credits etc.**	
• **Payments- Contains records of payments/receipts.**	
• **Account- A summary of transactions and statements.**	