

Optinet™
FLEX
ADVANCED PRACTICE MANAGEMENT SOFTWARE



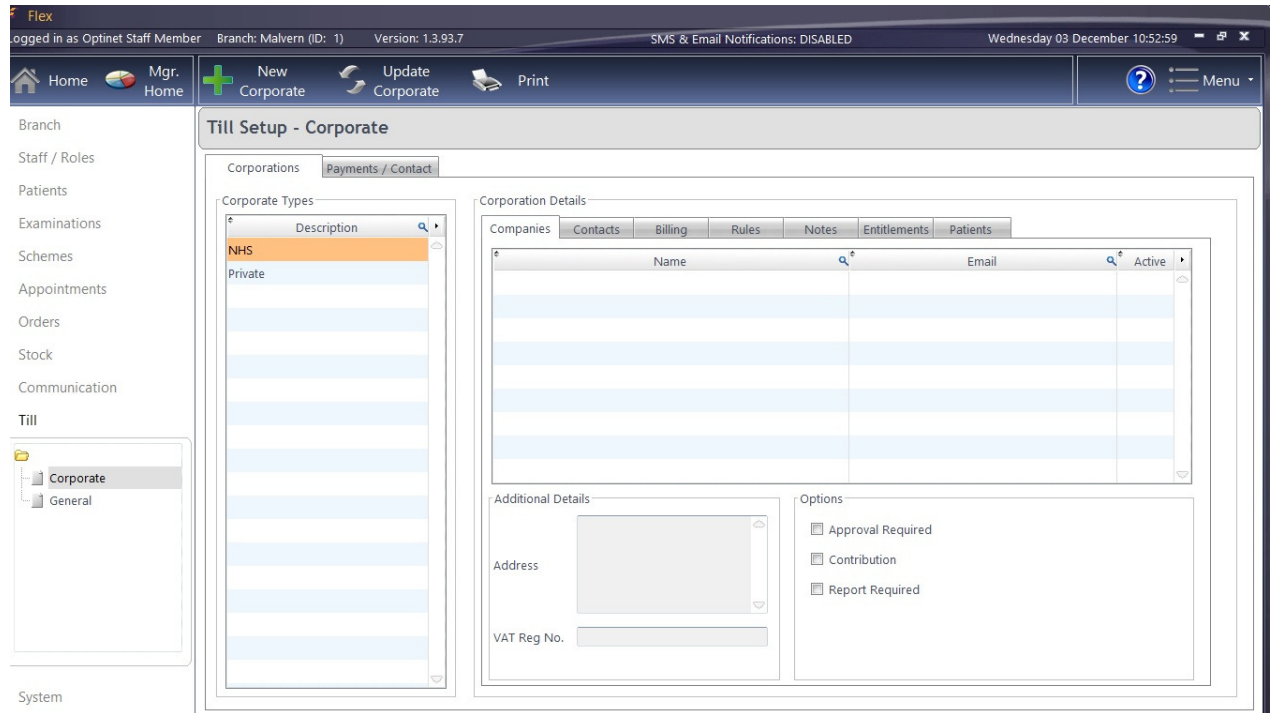
A guide to modifying your Corporate Clients in FLEX from Optinet.

Prepared by Chris Gray – chris.gray@optinetuk.com

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

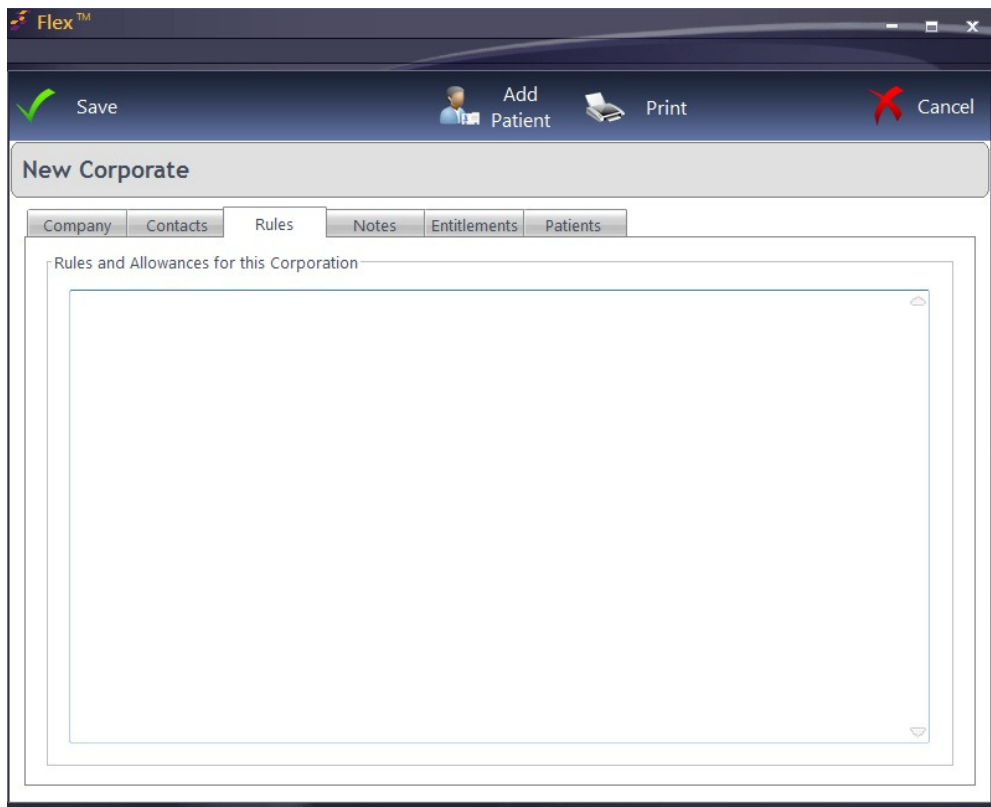
Let's start by adding a new corporate client. Press the **New** button on the Corporate screen. Note the **Update** button brings up the same window (albeit with details to amend, not start afresh).

The screenshot shows the 'New Corporate' form in the Flex software. The form is titled 'New Corporate' and has tabs for 'Company', 'Contacts', 'Rules', 'Notes', 'Entitlements', and 'Patients'. The 'Contacts' tab is selected. The form is divided into four sections: 'Contact Details', 'Billing Details', 'Additional Details', and 'Options'. 'Contact Details' includes fields for Name, Address, Telephone, Fax, and Email. 'Billing Details' includes fields for Address, Billing Tel, Billing Fax, and Billing Email. 'Additional Details' includes fields for VAT Reg No., Type, and Payment By. 'Options' includes checkboxes for Approval Required, Contribution, Report Required, and Active (checked). The top bar has 'Save', 'Add Patient', 'Print', and 'Cancel' buttons.

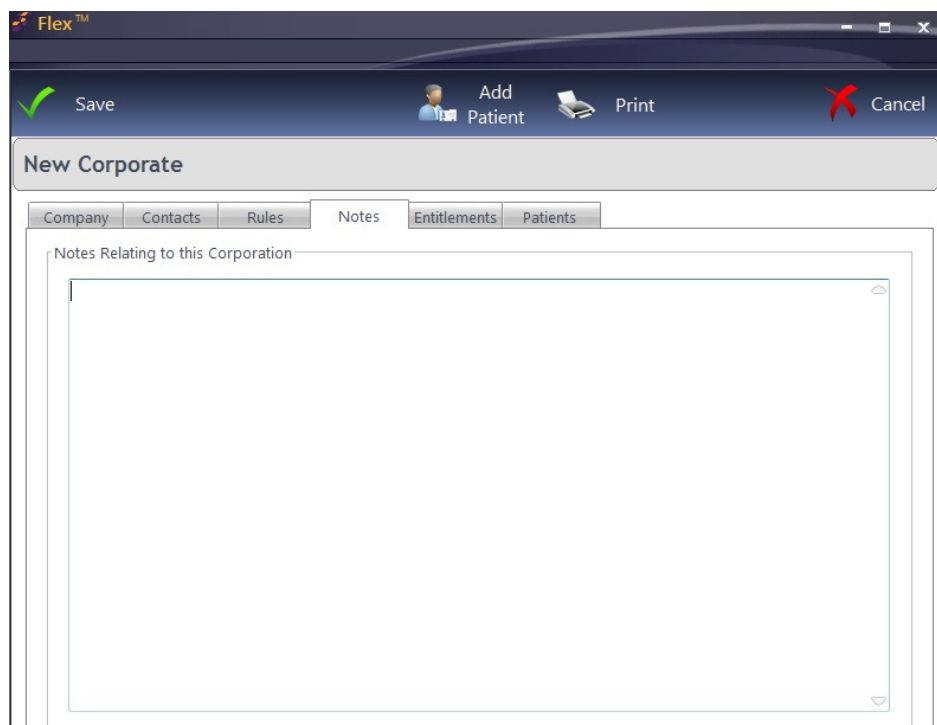
Add all the relevant **Contact Details**, **Billing Details** and **Additional Details**. Check the relevant boxes for which **Options** apply.

The screenshot shows the 'New Corporate' form in the Flex software, with the 'Contacts' tab selected. The form is titled 'New Corporate' and has tabs for 'Company', 'Contacts', 'Rules', 'Notes', 'Entitlements', and 'Patients'. The 'Contacts' tab is selected. The form is divided into two sections: 'Contacts at this Company' and 'Contact Details for this Contact'. 'Contacts at this Company' is a table with columns for Contact, Position in Company, Contact Type, and Salutation. 'Contact Details for this Contact' is a table with columns for Type and Detail. The top bar has 'Save', 'Add Patient', 'Print', and 'Cancel' buttons.

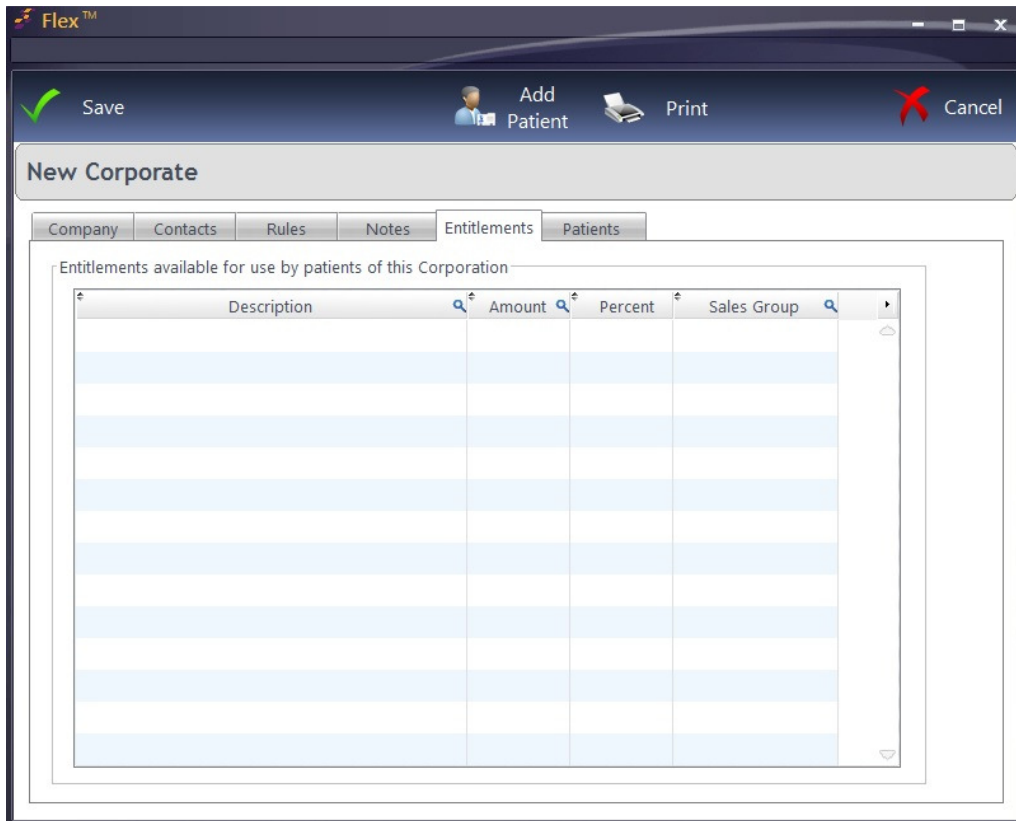
In the second screen, **Contacts at the Company** and **Contact Details for the Contact** are added. Click into a new row to add details.



Rules and Allowances can be entered as free text.



Notes can also be entered as free text.



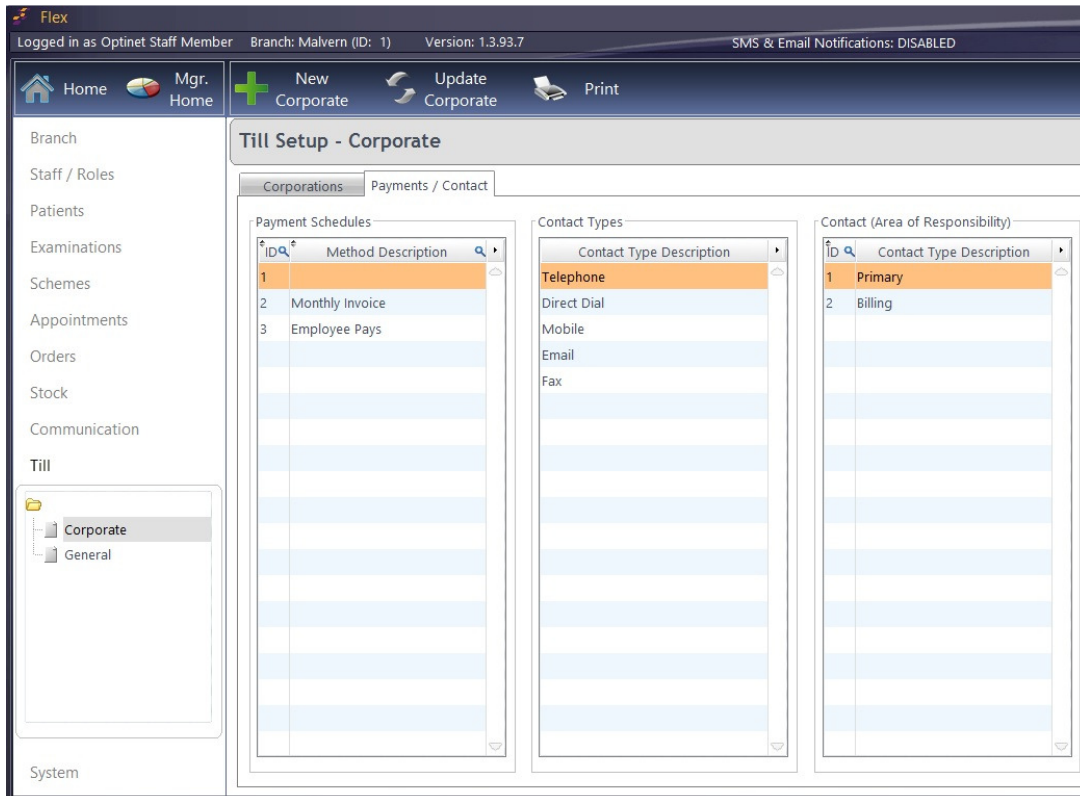
Entitlements can be entered, with the final column being a drop down of the relevant **Sales Group** for an item.

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**. Patients can also be added and removed under the "**Other Actions**" menu in the [Patient Records](#)

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

Shown below is the second tab of the Corporate window.



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:

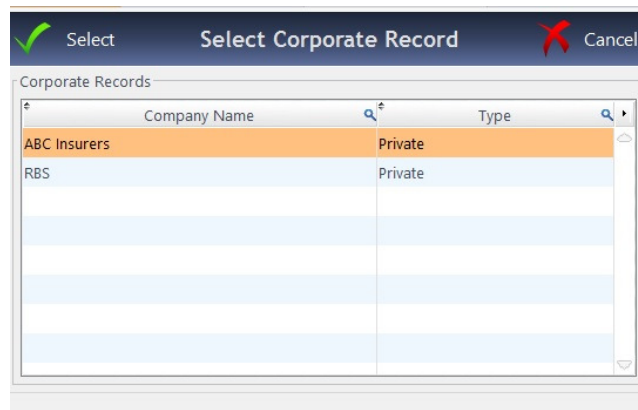
Patients can be assigned to (and removed from) a Corporate. To do this, click onto **Update** and **Other Actions**. Choose "**Assign to Corporate**". The following box appears:



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.



Please see our online help system, or call us on 0845 313 0233 for more help with Corporate in FLEX.