

## IES Medical: Business Integration

### Purpose

The purpose of this Document is to present the fact that the Medical system is integrated with and interacts all the time with a series of other Business Modules, i.e. IES Business.




### Introduction

For a Medical Practice, the Medical module is the heart of the system. However, the Medical module must be understood to be a part of, working together with, and being seamlessly integrated to the other modules in the system.

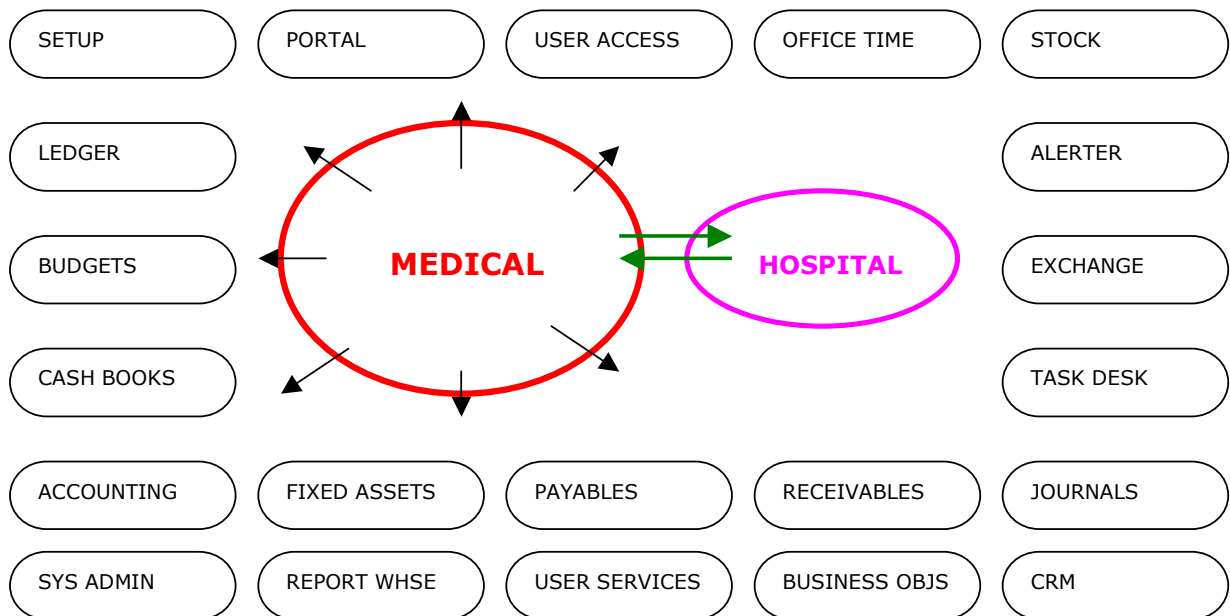
For all functions outside the primary Medical module the User can link straight to the module where the sought function is found, by choosing the module links shown below the main Medical functions.

Other Modules of the system can be opened by choosing these links ...

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## Module Integration

Below, we show the primary modules used in the Medical system. For Medical Practices that are part of a Hospital, the Hospital module will be in active use, but in other cases it will never be used. When the Hospital module is linked, then the Patients and Account Holder registers are shared, i.e. the same.



Now, we present a short narrative to show what you might link to each of the other modules for –


**Access Profiles** – to set up User Menus and privileges.

**Accounting Controls** – for Tax Management functions (e.g. VAT reporting, etc.), Financial Period management, Annual P&L, etc. Hint: Each month end, you will use Period Management to tell the system to change the ACTIVE PERIOD to the new month.

**Accounts Payable (Creditors)** – For any function related to Suppliers from whom you order goods or services, and from whom you receive Invoices to pay.

**Accounts Receivable (Debtors)** – All the Patients that are seen or treated at the Medical Practice are linked to Account Holders (the persons responsible for Payment of charges), and these Account Holders are the Customers or Debtors. Therefore, to produce monthly statements, for example, you will use this module.

**Alerter** – This module is used by the system to perform automatic housekeeping functions (and it will force itself on you at least once a month if not otherwise activated, in order to perform these functions), and can also be used to perform assigned alert type functions, e.g. "remind me", etc.

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**Budgets** – The Financial Budget functions for the Medical Practice are performed here, i.e. you may optionally do annual budgets and capture them here. The performance of the Business will then be measured against these budgets.

**Business Objects** – This is the “developer” part of the system, and here, among other functions, you may write your own reports if you wish to do so.

**Cash Books** – You will use this module to perform Bank Deposits, Bank Reconciliations and other Cash Book related functions.

**Customer Relationship Management (CRM)** – CRM is actually so integrated to other modules that the CRM module is seldom directly opened. For example, when you work with a Customer or Supplier Account (or even a Patient Appointment), the CRM link is already present to open CRM events and see the history of events with this Patient or Customer.

**Electronic Exchange** – These functions are primarily related to Data Imports and Exports. For example, if you want to download a Master File (e.g. Patients) into a Spread Sheet, you can open the Query Builder here to do so.

**Fixed Assets** – This module is also optional to use. If the Fixed Assets of the Practice are recorded here, then you will use these functions to manage the Assets, perform Depreciation, etc.

**Hospital** – The Hospital module is only used when the Medical Practice is part of, and linked to, a Hospital. In this case, the Hospital functions (e.g. Patient Registration, Discharge, etc.) are performed here.

**Inventory (Stock and Stores)** – Stock management functions are performed here. If the Practice does not hold any recorded stock, then these functions will not be used.

**Journal Processing** – This module is used for processing of Journals (Transactions) in the Financial Accounting system, i.e. other than Medical Invoices, Credit Notes and Receipts.


**Ledger (GL)** – The General Ledger functions are found here, e.g. Account maintenance, enquiries, reports, etc.

**Office Time** – You may find the Diary system here, for private and / or corporate use, and Time Sheets, if you have any need for those.

**Portal Objects** – These functions will only be applicable if the Practice is connected to a website on the Internet, with the public interacting with the system from the Internet.

**Report Warehouse** – The Report Warehouse is used for executing Financial Statements and many other Reports, and you may also publish Reports here for retrieval at any later stage.

**Retail** – The Retail module is in fact where your charges are invoiced from on the Medical Invoices. In other words, the Retail Catalog is the register for the common charges passed to Medical Invoices, and all functions related to setting up and managing the Catalog are performed here.

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**System Set up** – This module is really only used when your system is set up and implemented for you.


**Systems Administration** – Functions for overall data management, upgrades, language controls, and others are found here.

**Task Desk** – This module includes all Task related functions, i.e. if you wish the system to manage task schedules for you.

**User Services** – This module includes various User Utilities and useful functions.

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