

PRODUCT MANAGEMENT

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OVERVIEW

The Goods & Services module is primarily used to hold details of products and services, these include attributes, properties and actions related to products and services. The following sections describe the functions of each of the product module tabs.

General Tab

The general tab is where basic information for products and services may be viewed and maintained. Details such as names, prices and other properties and attributes can be viewed and changed here.

Bravecto Chew Dog 2-4.5kg 3m (3 box) (Product# 1/1172)

1 : General | 2 : More | 3 : Stock | 4 : Discs | 5 : Complex | 6 : History | 7 : Stats | 8 : Doc Mgr

| | | | | |
|----------------------|------------------------------|------------------------------|--------------|---------------|
| Name | Bravecto Chew Dog 2-4.5kg 3r | Pack Prices (Exc Tax) | Price Scheme | List + Markup |
| Size | 3 box | List Price | \$45.000 | List Price |
| Class | Retail | Buy Discount 1 | 0.000 % | Markup |
| Printed Name | | - | \$45.000 | + 30.000 % |
| Category-1 | Parasite | Buy Discount 2 | 0.000 % | = Sell Price |
| Category-2 | Default | - | \$45.000 | = \$58.500 |
| Ann Types | *ALL* | Buy Discount 3 | 0.000 % | Margin |
| Action | None | - | \$45.000 | 23.077 % |
| Rem Type | | Buy Size | 1 | |
| Label Typ | Liquid | | | |
| Def. Label | LTOPICAL | Prices (Inc Tax) | | |
| Restricted | | Units | 1 | |
| Ref. Supplier | | Unit Cost | \$49.50 | |
| Status | Active | Unit Sell | \$61.430 | |
| User Code | PARASITE | Pack Sell Price | \$61.430 | |
| Complex | Not Cplx | | | |
| Certificate | | | | |
| Handout | | | | |
| Reporting | No | | | |

Units: 1, Unit Cost: \$49.50, Unit Sell: \$61.430, Pack Sell Price: \$61.430, Dose Size: 1, Dose Cost: \$49.50, Dose Sell: \$61.430, Variable Price.

By_Number | Actions | AF3 : Exit

Name

The product name is used as the basic identifier when looking up products and services. **Do not** start a product name with a numeric value. E.g. Use 'Tablet 1/2' as opposed to '1/2 Tablet'.

Size

This is the size of the product. In reports, this is usually printed in brackets at the end of the name. E.g. 500mg, 1lt, 1ml. It is better to enter the size of the product here than in the product name as many reports cut off long product names, but specifically allocate space for a product size.

| | |
|----------------------|---|
| Class | The product class is for grouping products together for sales analysis. Every product must have a class selected. The most commonly used classes of product are retail, service and material. Note that classes are predefined by the program and cannot be changed once the product has been used in a transaction (e.g. bill, invoice etc.). |
| Printed Name | The product name that is printed on Tax, Receipts, Invoices and Statements. It also can be used for searching, ordering, and invoicing. By default, the name will be copied into the Printed Name field but can be changed by users if required. |
| Category-1/2 | Product categories are used for financial reporting of sales and purchases. Your category structure should be designed to enable you to measure key performance areas in your organisation for which goals and targets are set. A product may only belong to one group in each category. |
| Patient Types | Restricts which patients this product can be sold to. E.g. A Dog Vaccination which has only Dogs selected cannot be added to a bill that only has a cat on it. |
| Action | Action at billing specifies a special action to be performed on sale of the product or service. Selecting one option from the list will allow the system to prompt for further action during the billing process. There are multiple types of actions: None - No action will be taken at billing Travel - When a product with this action is billed, it takes the distance in kilometres from the client file and multiplies it by the selling price per unit, to calculate a travel charge. De Sex - When a product with this action is billed, it will automatically mark the patient as desexed. Euthanasia - When a product with this action is billed, it will automatically ask the user whether to mark the patient as deceased and inactive. Room Rate – Room rate is used in conjunction with the hotel module. This action will multiply the price of the product by the number of days an patient has spent in the hotel diary. Chip ID – When Chip ID is selected on the product record, the insert barcode / chip ID form will open automatically when the item is added to the bill |
| Rem Type | This is the type of Reminder/Recall that will be recorded at billing. Selecting a reminder type will instruct the system to pop up a reminder/recall window at billing. For example, a "Vaccination" reminder may be used to record a future reminder vaccination for an patient. You can then print out weekly reminder lists and letters to see which patients are due for their vaccinations. TIP: To add a new reminder to the picklist go to the Options Pick Lists Setup Misc Reminder Types . You can now add reminders by clicking on the plus button or edit existing messages by double clicking on the reminder. |

| | |
|------------------------|---|
| Label Typ | This is the type of label that will be printed out at billing. For example, a label for a vaccination, injection tablet etc. This does not choose a specific label, if you want to choose a specific label you will need to choose a label from the ' Def. Label ' field. |
| Def. Label | <p>This is a specific default label that will be printed when this product is added as an item to a bill.</p> <p>TIP: To add a new label to the picklist go to the Options Pick Lists Setup Product Drug Label. You can now add labels by clicking on the plus button or edit existing labels by double clicking on the label name.</p> |
| Restricted | <p>This is a product restriction group for PAR/ RVM/ Schedule Drugs.</p> <p>TIP: To add and setup Restriction Groups go to the Option Pick List Setup Product Product Restriction.</p> |
| Pref. Supplier | The preferred supplier is the supplier you prefer to purchase the product from. Clicking on the ellipsis button will bring up a supplier search window. By clicking on the underlined ' Pref Supp ' link, this will open the supplier record. |
| Status | There are two options available, ' Active ' or ' Inactive '. A product should only be made inactive if it is no longer used. |
| User Code | This is a user defined search code used to easily identify or search for a product or group of products sharing the same code. |
| Complex | This field displays the type of complex product set in the ' Complex ' tab. |
| Certificate | Prints the selected document when this item is added to a bill. (Prints as soon as item added) |
| Handout | Prints the selected document when this item is added to a bill. (Prints when bill is completed) |
| Reporting | There are two options available, ' Yes ' or ' No '. Reporting product with no stock or price if it's 'Yes' |
| Price Scheme | <p>This is the scheme that is used for calculating product sell price. For each product user can calculate sell price as List+Markup, Cost+Markup or RRP.</p> <p>This option is enabled if you use New Pricing Screen (Can be changed under the Option Setup Product Use New Pricing Screen).</p> <p>TIP: Your country settings determine whether Cost or List Price is used. E.g. UK will use Cost Price whereas NZ and AUS will use List Price.</p> |
| List Price | The Price of the product exclusive of GST, and exclusive of any discount you receive from your supplier. |
| Buy Discount 1/ | The discount percentage that is received when the product is |

| | |
|------------------------|---|
| 2/ 3 | purchased. |
| Buy Size | The Buy Size field indicates the number of units that the product is purchased in. For example, a product could be received as a single item, or in packets of five, 10 etc. |
| Net Cost | The final price paid for the product after subtracting discounts. |
| Avg Cost | The average cost of the item is calculated automatically upon receipt of goods from your supplier. |
| Markup | The percentage markup that is added to the list price. |
| Sell Price | The unit-sell price of the product after the markup has been added. |
| Margin | The percentage of difference between the cost and the selling price. |
| Units | This is only used on a label, it indicates the unit measurement of the product e.g. litre, ml, cm, btl, etc. |
| Unit Cost | The unit cost is simply the cost per 'unit' of the product. This field is automatically calculated by the system using the formula Buy Price divided by Buy Size. |
| Unit Sell | The calculated sell price (including GST), of each unit. E.g. Pack Sell divided by buy size. |
| Dose Size | The size of dose in units (not in Packs). |
| Dose Cost | Cost of each dose. Again, this field is calculated by the system. Prices per dose and per unit can easily be compared to one another. |
| Dose Sell | The calculated sell price (including GST), of each dose. E.g. Pack Sell Price multiplied by Dose Size. |
| Pack Sell Price | The pack sell price is the overall sell price of the product, including GST. This field can be calculated by the system but is most commonly set by the user. |
| Thumb | <p>This area displays thumbnail pictures of the product. To add a picture that you have taken, you need to make sure that it is saved in the correct folder in the VETLINKPRO directory structure. Right click on the Thumbnail box and select 'Link Image'. A Product Images box will pop up, with a list of files you have in the imageprd directory. Select the image and you will see a preview of your picture. Alternatively, if you have a webcam or a camera, select 'Take Picture' you will be able to automatically import and link the image in one step.</p> <p>The folder that you need to save pictures in is 'imageprd'. This folder is located in the VETLINKPRO Local Drive (e.g. D:\VL2\DATA\IMAGEPRD). Once you have selected your picture, click 'OK', and your picture will be displayed on the product record.</p> |
| Ctrl-N | The ' Ctrl+N ' notes button is used to create notes that are related to the product. These notes can be manipulated to pop up at predetermined stages or screens in Vetlinkpro. The notes can be used to remind a staff member to do something or provide them with more information. The notes can be set up to print out on receipts, when adding items to bills or when receipting goods into stock etc. |

More Tab

This is an extension of the general tab. It provides more information relating to the setup of the product.

Bravecto Chew Dog 2-4.5kg 3m (3 box) (Product# 1/1172)

1 : General 2 : More 3 : Stock 4 : Discs 5 : Complex 6 : History 7 : Stats 8 : Doc Mgr

Round Sell: On Product (dropdown) To: 1

Buy GST: GST (dropdown)

Sell GST: Tax 1 (dropdown)

Caution: (text field)

Use Expiry: No (dropdown) Barcode: No Label (dropdown)

Category-3: Default (dropdown) Manufacturer: (dropdown)

Category-4: Default (dropdown) Franchise: (dropdown)

Category-5: Default (dropdown) BAM KPI: (dropdown)

Export To: (dropdown) Prescription Group: (dropdown)

☐ A: Mobile
☐ B: Web
☐ C: SFS

Link to Diary Reason(s)

Apply price changes on Purchase Invoice entry

Update List Price when new Buy Price exceeds: Yes (dropdown)

Update Sell Price when: Percent (dropdown) change to List Price is greater than: 0.00 % or less than: 0.00 %

GL Codes

Sales (Inc): (dropdown)

Cost of Sales (Exp): (dropdown)

Stock on Hand (Ast): (dropdown)

By_Number (dropdown) Actions AF3: Exit

Round Sell

Rounds the sell price to the number of cents specified. Round Sell on Product will round the price before the item is added to a bill. Round Sell on Bill will round the price to the cents specified after item is added to a bill and any quantity changes are made. Bill rounding can be found under [Options | Setup | Finance | 3: Charges](#).

Buy GST

Specifies the rate of tax to be paid on this item. Usually set to '1: GST'. See below for further explanation of options.

Sell GST

Specifies the tax that has been included in the selling price of the product. The options available are the same for 'Buy GST' above.

0: Exempt: If the product is exempt from tax

1: GST: If GST is paid

2: Zero Rated: GST at 0%

Caution

Any cautionary messages associated with the product are typed here. Examples are: 'Do not use with broken skin'.

Use Expiry

When set to 'Yes' the user will be prompted at billing to enter the batch number and expiry date of this item. The batch and

| | |
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| | expiry will print on the drug labels and users can choose whether to print on Statements or Tax Receipt / Invoice from Options Setup Product Options Batch & Expiry . |
| Category 3/4/5 | Product categories are used for financial reporting of sales and purchases. Your category structure should be designed to enable you to measure key performance areas in your organisation for which goals and targets are set. A product may only belong to one group in each category. |
| Export To | A: Mobile -> Tick this if you require this item to be uploaded to devices for Mobile billing. B: Web -> N/A C: SFS -> Tick this if you require this item to be uploaded to Smart Flow Sheet. |
| Barcode | This field determines whether a barcode will be printed when this product is receipted. There are three options; N: No Label: Does not print a Label. E.g. The product already has a manufacturers barcode on it. O: One Label With Unit Price: If 4 packs are receipted only 1 label will be printed with unit price. E.g. Cat collars may go into one big bin, so clients can see the price of only one cat collar only one barcode needs to be printed with unit price and stuck on the bin. Z: Label for Each Pack With Unit Price: If 4 packs are receipted, 4 labels will be printed with unit price. E.g. You may wish to display the price of individual tablets in a bottle. As it would be impractical to label each tablet you can print a label for each bottle with the unit price on it. U: Label for Each Unit With Unit Price: If 4 packs are receipted with 10 units in each pack, 40 labels will be printed with unit price. E.g. you may purchase 4 boxes with 10 sachets in each. As the sachets are displayed individually on the shelf each sachet needs to be labelled with a barcode. L: One Label With Pack Price: When 4 packs are receipted only 1 label is printed with pack price. E.g. This could be used in the store room for items where the client does not need to see the price and the same items are all kept together. A label can be stuck on the shelf so when ordering is done the price of one pack can easily be seen and scanned. P: Label for Each Pack With Pack Price: When 4 packs are receipted 4 labels are printed with pack price. E.g. you may purchase 4 boxes with 10 sachets in each. Instead of selling to clients by the sachet you sell by the box. In this situation, you would just need one label for each box with pack sell price. |
| Manufacturer | Not Implemented yet. |
| Franchise | Not Implemented yet. |
| BAM KPI | This is the product category that is used for uploading into Business Activity Monitor (BAM) to allow users to monitor their ongoing operations through core Key Performance Indicators. |

| | |
|----------------------------------|---|
| Prescription Group | Used for RVM's / Prescriptions. You can group similar drugs from different suppliers together so you can dispense any drug in that group when it has been added to a prescription. E.g the original prescribed drug may be out of stock. Prescriptions can be created from Options Picklist Setup Products Prescription Group |
| Link to Diary Reason(s) | Creates a new diary reason that is linked to the product. For <u>Services Only.</u> |
| Price Change Logic | Automates list and sell price changes when entering inwards goods invoices. This gives greater control over price changes, helping to ensure that prices are updated correctly when staff members are entering inwards goods invoices, especially when staff members are unfamiliar with price update procedures. |
| Update List Price when... | Means that list prices will be automatically increased when the buy price on an inwards goods invoice is higher than the existing list price. |
| Update Sell Price when... | These settings prevent sell price changes from Inwards Goods Invoices unless the list price change is larger than the amount specified as a percentage (%) or dollar value (\$). |
| GL Codes | This section is only relevant if you have purchased the GL module. It specifies the General Ledger codes to use when this product is used within the system. <u>TIP:</u> You can press ' Ctrl-Z ' to change the drop-down list to display by either GL Account Number first, or the GL Account Name. |
| Sales | The General Ledger code used for Sales. |
| Cost | The General Ledger code used for Cost. |
| Valuation | The General Ledger code used for Valuation. |

Stock Tab

Depending on your setup options the stock tab can be displayed in a number of different formats.

If you have multiple stores with seasonal / advanced ordering the stock tab will display like **Error! Reference source not found.** with each store listed in grid format. If advanced ordering is not turned on only one Min_Stk and one Max_Stk column will show.

The simple view, as shown by **Error! Reference source not found.**, will display for sites with a single store and where advanced ordering is not turned on.



TIP: To set up Advanced ordering go to [Options | Setup | Product | Options](#). Place a tick in the 'Advanced Ordering' tick box to turn on seasonal ordering.

Bravecto Chew Dog 2-4.5kg 3m (3 box) (Product# 1/1172)

1 : General | 2 : More | 3 : Stock | 4 : Discs | 5 : Complex | 6 : History | 7 : Stats | 8 : Doc Mgr

Stock | Specials | Batch | Stk Movement

Stock Details

| Str Nm | Store Name | Cur_Stock (Pack) | Stop Sales | Stop Purchasing | Min Stock | Max Stock | Bin/ Aisle | Stock Used | Last Stock_Date |
|--------|------------|------------------|--------------------------|--------------------------|-----------|-----------|------------|------------|-----------------|
| 1 | Master | 5.00000 | <input type="checkbox"/> | <input type="checkbox"/> | 1.00000 | 1.00000 | | 0.00000 | |
| 2 | State A | 25.00000 | <input type="checkbox"/> | <input type="checkbox"/> | 1.00000 | 1.00000 | | 0.00000 | |
| 3 | State B | 0.00000 | <input type="checkbox"/> | <input type="checkbox"/> | 1.00000 | 1.00000 | | 0.00000 | |

AF5 : Stock Take | AF6 : Stock Xfer | AF7 : Stock Adjust | AF8 : Barcodes

By_Number | Actions | AF3 : Exit

Stock

| | |
|------------------------------------|--|
| Str Num | This is the store number assigned by Vetlinkpro that stocks this item |
| Store Name | This is the store name that stocks this item |
| Cur Stock (Pack) / Stock OH | The stock on hand for a store. |
| Stop Sales | The stock item will not be able to be sold if this is ticked. |
| Stop Purchasing | The stock item will not be able to be purchased from the supplier if this field is ticked. E.g. stop buying until stock runs out i.e. does not appear on "orders". |
| Min Stock | The minimum stock that the store holds. If automatic orders are used, a product will be ordered if the current stock on hand is lower than the minimum stock figure. |
| Max Stock | The maximum quantity of stock that the store should hold. If an automatic order has been generated, orders will be created to get the stock on hand back to the figure specified here. |
| Bin Num / Aisle | The current location of this product on your shelves. This is used when generating stock take sheets. |
| Stock Used | <p>Displays the quantity of stock that has been sold. You can choose to show the quantity sold since the system began or the quantity sold since the last inwards goods invoice was receipted into stock.</p> <p>Tip: To configure which quantity you wish to display go to Options Setup Product Reset Stock Used on Receipt.</p> |
| Last Stock Date | This date is related to the Stock Used field above. If the stock used is the quantity since the system began it will show the first ever bill date which this product was on. If the stock used is the quantity since the last inwards goods invoice it will display the date of the first bill with this item on it since the last invoice for this item was receipted. |

Specials

Not Implemented

Batch

| | |
|---------------------|---|
| Str | This is the store number assigned by Vetlinkpro that stocks this item |
| Str Name | This is the store name that stocks this item |
| Expiry Date | The expiry date of the drug that is recorded at billing. |
| Batch Number | Batch number that is recorded at billing when a drug is sold. |

Stock Movement

The Stock movement tab provides a detailed transactional history of the stock on hand for a product over a period of time

| Date | Details | Trn Number | Billing | Purchase | Adjust ments | Stock On Hand |
|---------------------|-----------------|------------|----------|----------|--------------|-----------------|
| 12:00 AM 17/10/2017 | Carried Forward | | | | | 47.00000 |
| 10:57 AM 24/10/2017 | Tax Receipt | 1/272132 | -1.00000 | | | 46.00000 |
| 1:57 PM 24/10/2017 | Tax Invoice | 1/272134 | -2.00000 | | | 44.00000 |
| 1:57 PM 24/10/2017 | Tax Invoice | 1/272134 | -1.00000 | | | 43.00000 |
| 2:09 PM 24/10/2017 | Refund Bill | 1/272143 | 1.00000 | | | 44.00000 |
| 2:11 PM 24/10/2017 | Credit Note | 1/272144 | 2.00000 | | | 46.00000 |
| 2:11 PM 24/10/2017 | Credit Note | 1/272144 | 1.00000 | | | 47.00000 |
| 2:11 PM 24/10/2017 | Tax Receipt | 1/272145 | -2.00000 | | | 45.00000 |
| 2:11 PM 24/10/2017 | Tax Receipt | 1/272145 | -1.00000 | | | 44.00000 |
| 12:18 PM 25/10/2017 | Packing Slip | 1/2739 | | 1.00000 | | 45.00000 |
| 8:41 PM 7/12/2017 | Refund Bill | 1/273089 | 1.00000 | | | 46.00000 |
| 9:03 PM 7/12/2017 | Refund Bill | 1/274030 | 1.00000 | | | 47.00000 |
| 9:03 PM 7/12/2017 | Refund Bill | 1/274030 | 1.00000 | | | 48.00000 |
| Total | | | | | | 48.00000 |

Stock Buttons

| | |
|--------------------------|---|
| AF5: Stock Take | This button will open a Stocktake window. |
| AF6: Stock Xfer | This button will open a Stock Transfer window. |
| AF7: Stock Adjust | This button will open a Stock Adjustment window |
| AF8: Barcodes | This button will open a window, where you can make barcodes for this product or print all the barcodes in the queue. It also gives you a list of all barcodes you currently have in your queue and allows you to delete any barcodes that you may no longer require or have created by mistake. |

Discount Tab

The discount tab shows the discount, bonus point and incentive discount pricing structure for a product. It is split into two sections; client discounts and quantity discounts.

The client discounts section works in conjunction with your client record. When you bill a product, the system will first check to see what class the product is in. It will then check the client record to see what type of discount the client receives for that class of product and finally it will match the discount type to the product record to see what discount percentage or how many bonus points this client should receive.

The quantity discounts relate to any discounts a client will receive when they buy in bulk. For example, if a client buys five shampoo bottles they would receive a 5% discount, however if they bought 10 shampoo bottles they would receive a 10% discount.

V.2 Hills Canine Active 18.1kg (Product# 1/2062)

1 : General | 2 : More | 3 : Stock | 4 : Discs | 5 : Complex | 6 : History | 7 : Stats | 8 : Doc Mgr

Client Discounts

| Num | Disc Name | Disc % | Disc Sell | Bonus Pts | ID % | ID Sell |
|-----|------------|--------|-----------|-----------|------|----------|
| 0 | Normal | % | \$109.06 | 820 | % | \$109.06 |
| 1 | Platinum | % | \$109.06 | | % | \$109.06 |
| 2 | Gold | % | \$109.06 | | % | \$109.06 |
| 3 | Silver | % | \$109.06 | | % | \$109.06 |
| 4 | Bronze | % | \$109.06 | | % | \$109.06 |
| 5 | | % | \$109.06 | | % | \$109.06 |
| 6 | | % | \$109.06 | | % | \$109.06 |
| 7 | | % | \$109.06 | | % | \$109.06 |
| 8 | | % | \$109.06 | | % | \$109.06 |
| 9 | Bonus Poin | % | \$109.06 | 820 | % | \$109.06 |

Quantity Discounts

| Num | Qty | Disc % | Sell |
|-----|-----|--------|----------|
| 0 | 0 | % | \$109.06 |
| 1 | 0 | % | \$109.06 |
| 2 | 0 | % | \$109.06 |
| 3 | 0 | % | \$109.06 |
| 4 | 0 | % | \$109.06 |
| 5 | 0 | % | \$109.06 |
| 6 | 0 | % | \$109.06 |
| 7 | 0 | % | \$109.06 |
| 8 | 0 | % | \$109.06 |

Variable Pricing (Unit Price)

| Num | Description | Prc | Prc inc Tax |
|-----|----------------------------|----------|-------------|
| 1 | Hills Canine Active 18.1kg | \$109.06 | \$119.97 |

By_Order

By_Number

AF3 : Exit

| | |
|---------------------|---|
| Number | This is a unique number that is assigned by the system to each discount type. |
| Disc Name | The name of the discount type that a group of clients will receive. |
| Disc Per | The amount of discount a particular discount group receives. |
| Disc Price | The retail price after the discount has been applied. |
| Bonus Points | The amount of bonus points that discount group will receive for purchasing this product. |
| IDisc Per | The amount of discount a particular discount group receives when their account is paid on time. |
| IDisc Price | Retail price after the incentive discount has been applied. |

Quantity Discounts

These are discounts allocated according to the product quantities purchased.

Variable Pricing

Allows users to add different levels of pricing. When the item is billed users will then be able to choose from a list for the pricing level required. Reporting is still only available for the main record.

Complex Tab

The complex tab is used for setting up a complex product. A complex product is a product that is made up from a number of components. For example, a gift basket could be made up of dog shampoo, conditioner, comb etc., but is sold as one product.

V12 Pre-Anaesthetic Profile* (Product# 5755)

1 : General | 2 : More | 3 : Stock | 4 : Discs | **5 : Complex** | 6 : History | 7 : Stats | 8 : Doc Mgr

Complex Product Type: KitSet Num Comps: 4

Complex Details

Price/Disc from Comps: No
 Print On Bill: Both
 Print on Stmt: Master
 Print Comp. Prc on Bill: Yes
 Print Comp. Prc on Stmt: No
 Hide Comp. on Bill: No
 Hide Comp. Price on Bill: No

Component qty change alters the total price.

1. Component quantity may be changed at Billing
2. Component price may be changed at Billing
3. Component staff may be changed at Billing
4. Components will be visible at Billing
5. Component prices will be visible at Billing

| Item | Description | Prd_Num | Qty | Dur | Price |
|------|--------------------------------|---------|-----|-----|----------|
| 1 | Idexx QBC - Prep/Run/Analyse | # 5752 | 1 | | \$28.900 |
| 2 | Idexx Qbc Tubes | # 1400 | 1 | | \$14.030 |
| 3 | Idexx Biochem Prep/Run/Analyse | # 5753 | 1 | | \$28.900 |
| 4 | Idexx Pre-An Profile Slides | # 2565 | 1 | | \$45.640 |

Sell Price \$95,000

Navigation: By_Number, Actions, AF3: Exit

There are five different types of complex products. The complex product type usually determines the product's "EMBEDDED PROPERTIES". The user is then able to determine the product's "USER-DEFINED PROPERTIES" to pre-set the behaviour at billing time. The user is NOT able to modify the embedded properties of a complex product.

History Tab

The **'History'** tab provides details of all sales, orders and creditor purchases of a product. It is divided into four sections: Sales, Orders, Received and Price History.

V.L2 Hills Canine Active 18.1kg (Product# 1/2062)

1 : General | 2 : More | 3 : Stock | 4 : Discs | 5 : Complex | 6 : History | 7 : Stats | 8 : Doc Mgr

| Sales | | Orders | | Received | | Price History | | |
|--------------|------------|--|--|--------------|--------|-----------------------|----------|--------------|
| Bills | | | | Transactions | | | | |
| Date Range | | <input checked="" type="checkbox"/> 17/12/2017 | <input checked="" type="checkbox"/> 17/01/2018 | 1 Mth | 3 Mths | 6 Mths | 1 Year | F12 : Search |
| Bill Dt | Stk. Dt | Store | Qty (Unit) | Sell | Staff | Client | Bill# | |
| ▶ 16/01/2018 | 16/01/2018 | Takapuna | 1.000 | \$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274051 | |
| 16/01/2018 | 16/01/2018 | Takapuna | -1.000 | -\$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274050 | |
| 16/01/2018 | 16/01/2018 | Takapuna | 1.000 | \$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274049 | |
| 16/01/2018 | 16/01/2018 | Takapuna | -1.000 | -\$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274048 | |
| 16/01/2018 | 16/01/2018 | Takapuna | 1.000 | \$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274047 | |
| 16/01/2018 | 16/01/2018 | Takapuna | -1.000 | -\$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274046 | |
| 16/01/2018 | 16/01/2018 | Takapuna | 1.000 | \$109.060 | AW | Joe Bloggs (# 1/6843) | 1/274045 | |
| 3/01/2018 | 3/01/2018 | Takapuna | 15.000 | 1,635.950 | CPR | L Cook (# 1/6069) | 1/274043 | |
| 3/01/2018 | 3/01/2018 | Takapuna | 50.000 | 5,453.180 | DM | J Ross (# 1/6503) | 1/274042 | |
| 3/01/2018 | 3/01/2018 | Takapuna | 20.000 | 2,181.270 | DM | J Ross (# 1/6503) | 1/274041 | |
| 3/01/2018 | 3/01/2018 | Takapuna | 5.000 | \$545.320 | OWN | J Ross (# 1/6503) | 1/274040 | |

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Actions

AF3 : Exit

Sales Tab

The **'Sales'** tab is divided into a further two sections: **'Bills'** and **'Transactions'**.

The **'Bills'** tab provides a summary of all the bills where the product has been used. If you double-click on one of the bills it will open the original bill.

| Sales | | Orders | | Received | | Price History | | |
|------------|------------|--|--|--------------|--------|-------------------------|--------|--------------|
| Bills | | | | Transactions | | | | |
| Date Range | | <input checked="" type="checkbox"/> 29/11/2017 | <input checked="" type="checkbox"/> 29/12/2017 | 1 Mth | 3 Mths | 6 Mths | 1 Year | F12 : Search |
| Bill Dt | Stk. Dt | Store | Qty (Unit) | Sell | Staff | Client | | Bill# |
| 28/12/2017 | 28/12/2017 | Master | 1.000 | \$278.260 | OWN | In-house Client (# 1/9) | | 1/468 |
| 28/12/2017 | 28/12/2017 | Master | -0.200 | -\$55.650 | OWN | Mark Adamson (# 1/1053) | | 1/466 |
| 27/12/2017 | 27/12/2017 | Master | 0.500 | \$139.130 | OWN | In-house Client (# 1/9) | | 1/462 |
| 22/12/2017 | 22/12/2017 | Master | -0.100 | -\$27.830 | OWN | Grable Betty (# 1/1009) | | 1/461 |
| 22/12/2017 | 22/12/2017 | Master | 0.500 | \$139.130 | OWN | Grable Betty (# 1/1009) | | 1/460 |
| 13/12/2017 | 13/12/2017 | Master | 1.000 | \$278.260 | OWN | Mark Adamson (# 1/1053) | | 1/458 |

The '**Transactions**' tab is used for searching for transactions that contain the product. You are able to restrict your search results to a particular date range, staff member or client.

| Sales | | Orders | | Received | | Price History | |
|------------|--|--|-----------|--------------|------------|---------------|------------|
| Bills | | | | Transactions | | | |
| Date Range | <input checked="" type="checkbox"/> 29/11/2017 | <input checked="" type="checkbox"/> 29/12/2017 | Staff | Batch | | | |
| Client | Adamson Mark | ... | Animal | ... | | F12 : Search | |
| Date | Store | Qty | Sell (Ex) | GST | Sell (Inc) | Last Name | First Name |
| 28/12/2017 | Master | -0.2 | -55.65 | -8.35 | -64 | Adamson | Mark |
| 13/12/2017 | Master | 1 | 250.43 | 37.57 | 288 | Adamson | Mark |

Orders Tab

Clicking the '**Orders**' tab will display all of the orders that have been placed for the product or service.

| Sales | | Orders | | Received | | Price History | | |
|------------|--|--|--------------|----------|--------------|---------------|-----------|----------|
| Date Range | <input checked="" type="checkbox"/> 29/12/2014 | <input checked="" type="checkbox"/> 29/12/2017 | Show Last 15 | | F12 : Search | | | |
| Date | # | Pk Size | Qty Ord | Qty BO | Sup Cod | Buy (Excl) | Status | Store |
| 25/10/2017 | 1/215 | 1 | 1.000 | 0.000 | | \$81.730 | Received | Takapuna |
| 10/09/2015 | 1/175 | 1 | 1.000 | 0.000 | NORLOX1 | \$81.730 | Cancelled | Takapuna |

Received Tab

The '**Received**' tab shows all invoices for the product from the first time it was receipted to the current date.

The '**Inward Goods**' tab shows all receipts of stock, this can be filtered by date range or to show the last 15 invoices, click '**Show Last 15**'.

| Sales | | Orders | | Received | | Price History | | |
|--------------|--------|--|--|--------------|----------|---------------|----------|--------------|
| Inward Goods | | | | Transactions | | | | |
| Date Range | | <input checked="" type="checkbox"/> 29/12/2014 | <input checked="" type="checkbox"/> 29/12/2017 | Show Last 15 | | F12 : Search | | |
| Arv.Date | # | Store | Buy Size | Pk Arv | Bns. Arv | Prc/Pk | Disc | Status |
| 25/10/2017 | 1/2739 | Takapuna | 1 | 1.000 | 0.000 | \$81.7300 | \$0.0000 | Audit Logged |
| 11/11/2015 | 1/2732 | Takapuna | 1 | 1.000 | 0.000 | \$81.7300 | \$0.0000 | Acct Updated |
| 28/09/2015 | 1/2727 | Takapuna | 1 | 80.000 | 0.000 | \$0.0000 | \$0.0000 | Fully Paid |

The 'Transactions' tab on the 'Received' tab again filters the transactions by date range, staff member that purchased the item and the supplier the item was purchased from.

| Sales | | Orders | | Received | | Price History | |
|--------------|-----|---|---|--------------|----------------------------------|---------------|----------------------|
| Inward Goods | | | | Transactions | | | |
| Date Range | | <input type="text" value="20/03/2012"/> | <input type="text" value="20/04/2012"/> | Staff | <input type="text" value="OWN"/> | Sup | <input type="text"/> |
| Date | Qty | List (Ex) | GST | Buy (Inc) | Trn # | Supplier | |
| 14/05/2009 | 0 | 0 | 0 | 0 | # 1/6823 | System | |
| 27/04/2009 | 0 | 0 | 0 | 0 | # 1/6818 | System | |
| 7/04/2009 | 0 | 0 | 0 | 0 | # 1/6783 | System | |
| 25/02/2009 | 0 | 0 | 0 | 0 | # 1/6758 | System | |

Price History

Changes to product pricing are logged on a price history tab inside the history tab of each product record. This includes changes to list price, sell price, pack sell price, average cost and rounding. It can also record the staff ID (if logged in), user, pc and branch that it was changed at as well as if it was changed on a creditor invoice, from search and replace or on the product record. To view this tab, open a product record and go to [History->Price History](#).

Sales

Orders

Received

Price History

Price Options

☒ All
☒ List
☒ Sell
☒ Unit
☒ Average
☒ Markup

Date Range

☒ 29/11/2004
☒ 29/12/2017

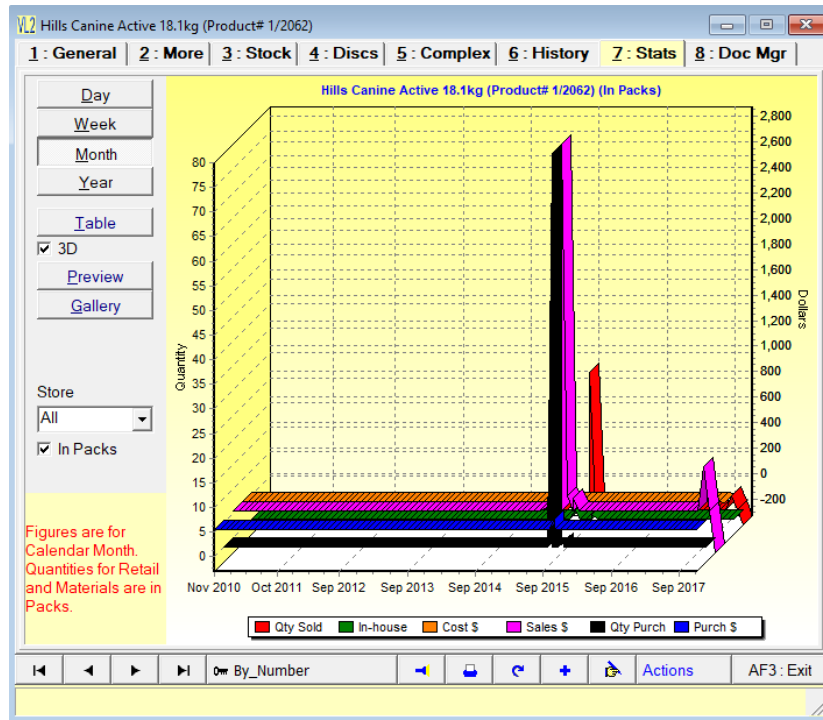
Show Last 15

F12 : Search

| Date | Reason | Staff | Last Cost | List Price | Unit Sell (Incl) | Pack Sell (Incl) | Avg. Cost | Markup (%) |
|------------------------|-------------|-------|-----------|------------|------------------|------------------|-----------|------------|
| | Current | | \$81.730 | \$82.000 | \$119.970 | \$119.970 | \$1.703 | 33.006 |
| 11/11/2015 11:55:35 AM | INV-# 1/273 | NG | \$81.730 | \$82.000 | \$119.970 | \$119.970 | | |
| 11/11/2015 11:55:35 AM | INV-# 1/273 | NG | | | | | \$1.703 | |
| 28/07/2015 11:58:44 AM | Staff | | | \$81.730 | \$119.580 | \$119.580 | | 33.006 |
| 24/07/2012 6:14:24 AM | Initial | | \$0.000 | \$0.000 | \$0.000 | \$0.000 | \$0.000 | 0.000 |

Stats Tab

This displays statistical figures concerning the product item. Clicking on the buttons to the left of the window displays the information on a daily, weekly, monthly and yearly basis. The same information can also be viewed in graphical form or in tabular format as shown below.



V12 Hills Canine Active 18.1kg (Product# 1/2062)

1 : General 2 : More 3 : Stock 4 : Discs 5 : Complex 6 : History 7 : Stats 8 : Doc Mgr

Day
Week
Month
Year
Table
☒ 3D
Preview
Gallery

Store
All
☒ In Packs

Figures are for Calendar Month. Quantities for Retail and Materials are in Packs.

| Date | Qty_Sold | Qty_InHse | Qty_Purch | Sales | Cost | Purchases | Sto |
|----------|----------|-----------|-----------|---------|--------|-----------|-----|
| Dec 2017 | -3 | 0 | 0 | -323.91 | -5.109 | 0 | Ta |
| Nov 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Oct 2017 | 3 | 0 | 0 | 347.92 | 5.109 | 0 | Ta |
| Sep 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Aug 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Jul 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Jun 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| May 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Apr 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Mar 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Feb 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Jan 2017 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Dec 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Nov 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Oct 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Sep 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Aug 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Jul 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Jun 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| May 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Apr 2016 | 0 | 0 | 0 | 0 | 0 | 0 | |

By_Number Actions AF3 : Exit

SEARCH FUNCTION

The goods and services search function is used in many areas of the program, for example when creating a client invoice or creditor order. Regardless of the area of the application you are in, when searching for a product the same search options and dialogue boxes are used throughout the program.

How to Perform a Basic Search

1. Click on the **'Product'** button.
2. This will display the goods and services search window.
3. Enter the first few letters of the product name, user code or supplier code.
4. Click **'F12: Search'** to begin the search.
5. The search results are now displayed. To navigate through the list, use the keyboard cursor keys (Up arrow and down arrow) or use the scroll bar at the right-hand side of the window.
6. To make a selection;
 - a. Double-click on a line in the results window or press the **'F12'** key on the line you wish to select to open the record.
 - b. To browse the Item without closing the search window click **'F11: Browse'**.

Search Product for Viewing/maintenance

1 Name/Number: ADVANTAG 2 User Code: 3 Supplier Code:

★ F3 ✓ F12: Accept ✗ ESC: Cancel + F7: New F8: Advanced ↺ F9: Retry F11: Browse

| Name | Usr_Co... | Prd_Size | Clas... | Stat... | Sell_Price | Sell_\$(Incl) | Dose_Sell | Dose_\$(Incl) | Unit_Sell | Unit_\$(Incl) | Prd # | Buy_Si... | Cat_1 | Cat_2 | Rep |
|------------------------------|-----------|----------|---------|---------|------------|---------------|-----------|---------------|-----------|---------------|----------|-----------|----------|---------|-----|
| ▶ Advantage Cat 0-4kg 4m | PARASITE | 4 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1159 | 1 | Parasite | Default | N |
| Advantage Cat 0-4kg 6m | PARASITE | 4 box | R | A | 78.000 | 81.900 | 78.000 | 81.900 | 78.000 | 81.900 | # 1/1160 | 1 | Parasite | Default | N |
| Advantage Cat 4kg+ 4m | PARASITE | 4 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1161 | 1 | Parasite | Default | N |
| Advantage Cat 4kg+ Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1162 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg 4m | PARASITE | 1 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1163 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg 6m | PARASITE | 6 box | R | A | 78.000 | 81.900 | 78.000 | 81.900 | 78.000 | 81.900 | # 1/1164 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1165 | 1 | Parasite | Default | N |
| Advantage Dog 10-25kg 6m | PARASITE | 6 box | R | A | 91.000 | 95.550 | 91.000 | 95.550 | 91.000 | 95.550 | # 1/1166 | 1 | Parasite | Default | N |
| Advantage Dog 10-25kg Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1167 | 1 | Parasite | Default | N |
| Advantage Dog 25kg+ 4m | PARASITE | 4 box | R | A | 97.500 | 102.380 | 97.500 | 102.380 | 97.500 | 102.380 | # 1/1168 | 1 | Parasite | Default | N |
| Advantage Dog 25kg+ Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1169 | 1 | Parasite | Default | N |

Using Advanced Search options

If you cannot find the product you need, or if there are too many results to search through, you can narrow your search by using the advanced search function.

1. Click on the **'Product'** button.
2. This will display the **'Goods and Services Search Window'**.
3. Click on the **'F8: Advanced'** button.
4. The **'Advanced Search Form'** will now open.
5. This form provides more options for you to search by, such as the product number, user code, status and Supplier Code.
6. Enter the details you wish to search by.
7. To make a selection;
 - a. Double-click on a line in the results window or press the **'F12'** key on the line you wish to select to open the record.
 - b. To browse the Item without closing the search window click **'F11: Browse'**.

| Name | Ustr.Co. | Prd_Size | Cla. | Stat. | Sell_Price | Sell_\$(Incl.) | Dose_Sell | Dose_\$(Incl.) | Unit_Sell | Unit_\$(Incl.) | Prd # | Buy_Si. | Cat_1 | Cat_2 | Rep |
|------------------------------|----------|----------|------|-------|------------|----------------|-----------|----------------|-----------|----------------|----------|---------|----------|---------|-----|
| Advantage Cat 0-4kg 4m | PARASITE | 4 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1159 | 1 | Parasite | Default | N |
| Advantage Cat 0-4kg 6m | PARASITE | 6 box | R | A | 78.000 | 81.900 | 78.000 | 81.900 | 78.000 | 81.900 | # 1/1160 | 1 | Parasite | Default | N |
| Advantage Cat 4kg+ 4m | PARASITE | 4 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1161 | 1 | Parasite | Default | N |
| Advantage Cat 4kg+ Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1162 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg 4m | PARASITE | 1 box | R | A | 58.500 | 61.430 | 58.500 | 61.430 | 58.500 | 61.430 | # 1/1163 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg 6m | PARASITE | 6 box | R | A | 78.000 | 81.900 | 78.000 | 81.900 | 78.000 | 81.900 | # 1/1164 | 1 | Parasite | Default | N |
| Advantage Dog 0-4kg Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1165 | 1 | Parasite | Default | N |
| Advantage Dog 10-25kg 6m | PARASITE | 6 box | R | A | 91.000 | 95.550 | 91.000 | 95.550 | 91.000 | 95.550 | # 1/1166 | 1 | Parasite | Default | N |
| Advantage Dog 10-25kg Single | PARASITE | 1 box | R | A | 19.500 | 20.480 | 19.500 | 20.480 | 19.500 | 20.480 | # 1/1167 | 1 | Parasite | Default | N |

Most Recently Used List

The F3 star button will show the most recently searched list. For example if you are looking at a product record and accidentally close it, then can't remember which item you were looking at, just click the star icon to find the most recently used records.

HOW TO ENTER NEW GOODS OR SERVICES

1. Click on the **'Product'** button and the **'Product Search'** window will open.

The screenshot shows a window titled "Search Product for Viewing/maintenance". It has input fields for "1 Name/Number", "2 User Code", and "3 Supplier Code". Below these are several buttons: "★ F3", "✓ F12 : Search", "✗ ESC : Cancel", "✚ F7 : New", "F8 : Advanced", "F9 : Retry", and "F11 : Browse". A red arrow points to the "F7 : New" button. Below the buttons is a table with columns: Name, Usr_Code, Prd_Size, Class, Status, Sell_Price, Sell_\$(Incl), Dose_Sell, Dose_\$(Incl), Unit_Sell, Unit_\$(Incl), Prd #, Buy_Size, Cat_1, Cat_2, and Reportin.

2. Click on the **'F7: New'** button to enter a new product.
3. The **'Product Profile'** window will open.
4. Select the product profile you wish to use.

The screenshot shows a window titled "Select a Profile". It contains the text: "Please Select a Product Profile for the New Product." and "Default Values for various items are copied from the Profile into the Product Record. These can then be changed to suit." Below this is a yellow box with the text: "If you are using the General Ledger, then it is very important that you check the GL Codes before saving the product record." At the bottom is a table with columns: Name, Class, Action, and SNumber.

| Name | Class | Action | SNumber |
|--------------------|-------|--------|---------|
| Account Payment | \$ | N | # 1/8 |
| Client Adjustments | J | N | # 1/16 |
| Desex | S | D | # 1/13 |
| Dispensing Fee | F | N | # 1/10 |
| Drugs (General) | D | N | # 1/4 |
| Euthanasia | S | E | # 1/14 |
| Expenses (General) | E | N | # 1/6 |
| Finance | S | N | # 1/9 |

Below the table is a button labeled "✗ ESC : Cancel".



TIP: Product Profiles enter some default information when creating new goods or services. Each profile can enter different information which is configured by users. This makes product entry faster and helps stop mistakes being made.

5. A **'New Product Record'** will open.
6. Enter the new product details onto the form.
7. Click on the tick button to save.

HOW TO CHANGE PRODUCT DETAILS

1. Click on the **'Product'** button.
2. Search for the product whose details you wish to edit.
3. Open the product record.
4. Edit the details you wish to change or add.
5. If you are unable to edit the details, click on the **'Edit'** button on the bottom of the product window.
6. Once the product details have been modified save the changes by clicking on the tick in the bottom right hand corner.

The screenshot shows the 'Dog Silencer Refill (Product# 1/1609)' window. The 'General' tab is selected, showing fields for Name, Size, Class, Printed Name, Category-1, Category-2, Anm Types, Action, Rem Type, Label Type, Def. Label, Restricted, Pref. Supplier, Status, User Code, Complex, Certificate, Handout, and Reporting. The 'Pack Prices (Exc Tax)' section shows a list price of \$24.860, buy discounts of 0.000%, and a net cost of \$24.860. The 'Prices (Inc Tax)' section shows a unit cost of \$27.35, unit sell of \$41.000, and pack sell price of \$41.000. A red arrow points to the 'Actions' button at the bottom right of the window.

ADDING PRODUCT DRUG LABELS

Drug labels are predefined labels that you can attach to a product or service and print out at billing. To create a drug label, follow the steps below.

1. Click on the **'Options'** menu and select **'Pick Lists Setup'**.
2. Expand the **'Product'** menu.
3. Double-click on **'Drug Label'** and the drug label pick list will open.
7. To add a new label, click on the plus button at the bottom of the page.
4. Select **'OK'** to the insert new record prompt and the Product Script form will open.
5. Select the type of form you want to create, enter a code and the directions you want to display on the script.
6. Click on the **'Accept'** button to save the script.
7. You can now open a product record and attach the label to the product.

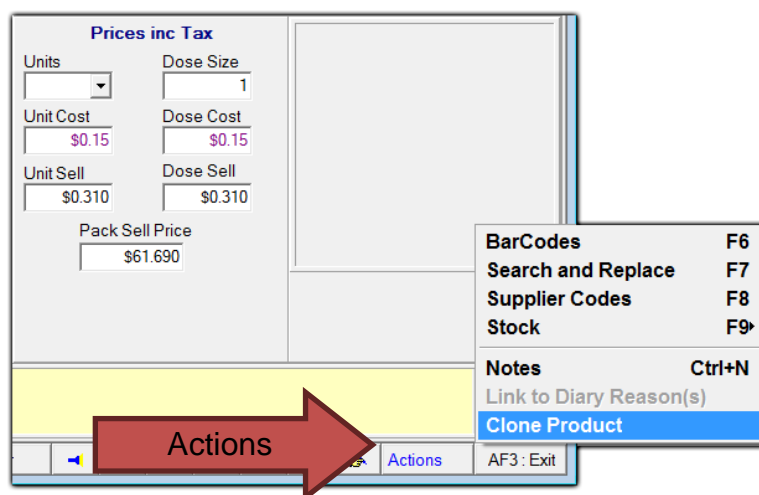
ADDING PRODUCT CATEGORIES

Categories group clients, products, suppliers or patients together for reporting purposes. Common categories for clients could include beef, dairy or sheep. You can then generate a report for a particular category to see their sales figures or profitability. See below for instructions on creating a new category.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, patient, product or supplier menu depending on what type of category you are setting up.
3. Double-click on category 1 or 2. If you are creating a product category you have an extra three categories to choose from.
4. If you are creating a new category click on the red plus button at the bottom of the form. (If you are editing a category name just click on the name with the mouse and type in the new name.)
5. A blank line will be added at the bottom of the grid. Type in the name of the category and click on the plus button to save.

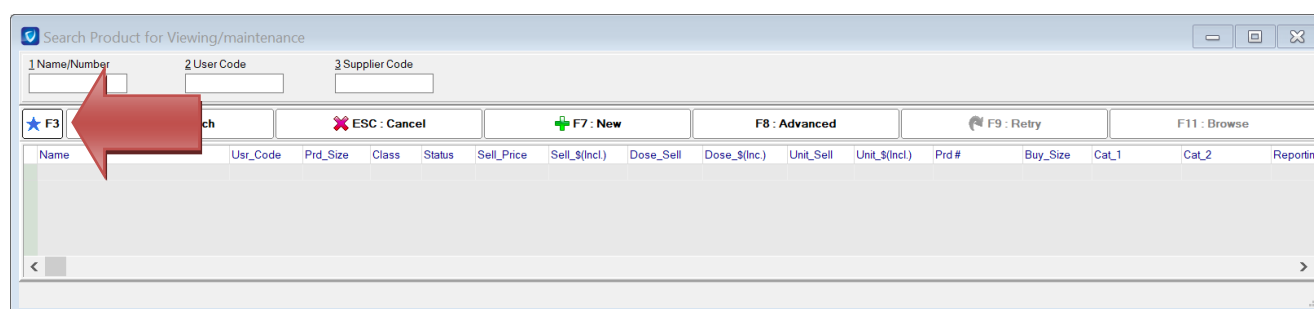
CLONING PRODUCTS

The Clone Product feature which allows you to create a brand-new copy of an existing product. This is useful when you are adding a couple of similar products such as complex products with many items that need only minor alterations or if you are creating a new version of an existing product that you may be making inactive. To access this function, use the **'Actions'** button on the bottom of any product record.



MOST RECENTLY USED LIST

The F3 star button will show the most recently searched list. For example if you are looking at a product record and accidentally close it, then can't remember what you were looking at, just click the star icon to find the most recently used records.



ADDING PRODUCT PROFILES

When a new client, product or patient is added to your database, a profile is requested. Examples include Adult, Member, etc. The profile acts like a template and is there so that users in your business do not have to make decisions on a number of client configurations when setting up new client, product or patient records. These settings include what mailing list they will be automatically subscribed to, the report category that they will be assigned to, the discount levels that they will be given or the batch group they will go to for statements. You can create new product profiles with pre-set criteria and train your staff to select the correct ones when adding new products. This 'standardisation' within your organisation will benefit the clinic as data entry will be faster and more accurate as a number of options will not have to be selected each time a new record is added to the database.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the Product menu.
3. Double-click on profile. And the product profile form will open.
4. To edit an existing profile, double-click on the profile name. To create a new profile, click on the **'+'** button at the bottom of the screen.
5. The product profile form will open. Select the options you wish to use in the profile.
6. Once you have set the fields for the profile click on the **'Accept'** button to save and exit.

SEARCH AND REPLACE

Search and replace is a function which can update different variables in goods and services in bulk.

IMPORTANT: There is no rollback/undo on the function once you confirm changes. So be sure you are confident on how it works before applying any changes otherwise please contact the support desk for help.

To use search and replace;

1. Go to any product record.
2. Click the actions button at the bottom of the product record and choose search and replace.
3. The Search and Replace form will open.
4. The first tab, **Search Criteria**, is where you can select the group of products to update. You can leave the selections set to all to do everything or select specific categories /classes to update.

Search And Replace in Products

Search Criteria | Values To Modify | Apply

Search For Following Products

Class

☐ All

☒ Select

- ☐ Service
- ☐ Fee
- ☒ Retail
- ☐ Material
- ☐ Drug
- ☐ Expense
- ☐ DR Journal
- ☐ CR Journal

For GL Code changes, one and only one class must be selected

Category 1

☐ All

☒ Select

- ☐ Euthanasia
- ☐ Fees
- ☐ Flea control
- ☐ Flea Control
- ☒ Food
- ☐ Grooming
- ☐ Heartworm co
- ☐ Hospital

Category 2

☒ All

☐ Select

- ☐ Accessories
- ☐ Anaesthesia
- ☐ Bandages/Dre
- ☐ Cleaning
- ☐ Consultation
- ☐ Consumables
- ☐ Default
- ☐ Dentistry

Complex

☒ All

☐ Select

- ☐ Not Cplx
- ☐ KitSet
- ☐ Drug
- ☐ Vaccination
- ☐ Surgery
- ☐ Macro
- ☐ Other
- ☐ Error

Category 3

☐ All

☐ Select

- ☐ Default
- ☐ Drug Label R
- ☐ Drug
- ☐ DrugProcedu
- ☐ DrugProduct
- ☐ Procedure
- ☐ ProcedureDr
- ☐ ProcedurePr

Category 4

☒ All

☐ Select

- ☐ Default

Category 5

☒ All

☐ Select

- ☐ Default

Reporting products will not be included for search and replace.

5. After selecting Search Criteria click on **Values to Modify** tab to select which values to changes.
 - a. Click the Clear button first to make sure any previous selections are removed.
 - b. Once previous selections are cleared there are multiple selections here to choose from. For example to update sell prices by 2% set Sell Price (By %) to 2.

Search And Replace in Products

| Search Criteria | Values To Modify | Apply | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|---------------------|-----------------|-----------------------|-----------------|-----------------------|--------|--|--|--|--|--------|--|--|--|--|-----------|--|--|--|--|---------|--|--|--|--|-------|--|--|--|--|------------|--|--|--|--|--|
| Price List Price (By %) <input type="text"/> Cost Price (By %) <input type="text"/> Sell Price (By %) <input type="text"/> 2 Markup (To %) <input type="text"/> BuyDiscount (To %) <input type="text"/> Category 1 To <input type="text"/> Category 2 To <input type="text"/> Category 3 To <input type="text"/> Category 4 To <input type="text"/> Category 5 To <input type="text"/> Category 6 To <input type="text"/> ReminderType To <input type="text"/> Label Type To <input type="text"/> Supplier To <input type="text"/> Status To <input type="text"/> Class To <input type="text"/> Sales GL To <input type="text"/> Cost GL To <input type="text"/> Asset GL To <input type="text"/> To Web To <input type="text"/> To Mobile To <input type="text"/> Price Change Logic Update List Price when new Buy Price exceeds <input type="text"/> Update Sell Price when change to List Price is greater than <input type="text"/> or less than <input type="text"/> <input type="button" value="Clear"/> | Discount <table border="1"> <thead> <tr> <th>Name</th> <th>Discount To %</th> <th>Incentive Disc To %</th> <th>Bonus Pts Value</th> <th>Bonus Pts To % of RRP</th> </tr> </thead> <tbody> <tr><td>Normal</td><td></td><td></td><td></td><td></td></tr> <tr><td>Senior</td><td></td><td></td><td></td><td></td></tr> <tr><td>Staff/Own</td><td></td><td></td><td></td><td></td></tr> <tr><td>Special</td><td></td><td></td><td></td><td></td></tr> <tr><td>Owner</td><td></td><td></td><td></td><td></td></tr> <tr><td>Owner Frie</td><td></td><td></td><td></td><td></td></tr> </tbody> </table> Add / Remove from Store Add To Store <input type="text"/> Remove From Store <input type="text"/> Set Min/Max Stock <input type="checkbox"/> Set Minimum and Maximum Stock <input type="text"/> Select Branch <input type="checkbox"/> Use sales from all stores <input type="text"/> Select Store <input type="text"/> Use Sales From Month <input type="text"/> % of Sales for Minimum Stock <input type="text"/> % of Sales for Maximum Stock | Name | Discount To % | Incentive Disc To % | Bonus Pts Value | Bonus Pts To % of RRP | Normal | | | | | Senior | | | | | Staff/Own | | | | | Special | | | | | Owner | | | | | Owner Frie | | | | | |
| Name | Discount To % | Incentive Disc To % | Bonus Pts Value | Bonus Pts To % of RRP | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Normal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Senior | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Staff/Own | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Special | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Owner | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Owner Frie | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Enter 0 to force price recalculation

6. After selecting values then click the **Apply** tab.
 - a. On here you will first need to click **Load Product Update** button. This load load the items to be updated
 - b. You can then click on the **Before** and **After** buttons to see the values before and after the update.
 - c. When happy click **Apply**. Depending how many products you are updating it may take a while to run through.

Search And Replace in Products

| Search Criteria | Values To Modify | Apply | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------------------------|------------|------------|------------|-------------|--------|------------|-------------------------|--------|------------|----------------------------|--------|------------|--------------------------|------|------------|-------------------------|--------|------------|-------------------------|--------|------------|-------------------|-------|------------|--------------------------|--------|------------|--------------------------|-------|------------|---------------------------|--------|------------|----------------|--------|------------|--------------------|--------|--|--|
| Staff <input type="text"/> <input type="button" value="F2 : Load Product Update"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Ref_Number</th> <th>Name</th> <th>Sell_Price</th> </tr> </thead> <tbody> <tr><td>1000002098</td><td>4CYTE 100gm</td><td>49.777</td></tr> <tr><td>1000002121</td><td>Advance Canine Democare</td><td>37.817</td></tr> <tr><td>1000001009</td><td>Advance Cat Weight Control</td><td>39.013</td></tr> <tr><td>1000001010</td><td>Advance Cat adult/senior</td><td>40.3</td></tr> <tr><td>1000001737</td><td>Advance Dermcare Canine</td><td>82.732</td></tr> <tr><td>1000001014</td><td>Advance Dog Large Breed</td><td>68.809</td></tr> <tr><td>1000001638</td><td>Advance Dog Adult</td><td>36.01</td></tr> <tr><td>1000001012</td><td>Advance Dog Adult/Weight</td><td>31.317</td></tr> <tr><td>1000001013</td><td>Advance Dog Puppy Growth</td><td>36.01</td></tr> <tr><td>1000001859</td><td>Advance Dog Senior/Mature</td><td>33.267</td></tr> <tr><td>1000002418</td><td>Advance Kitten</td><td>39.663</td></tr> <tr><td>1000001015</td><td>Advance Puppy Plus</td><td>33.774</td></tr> </tbody> </table> | Ref_Number | Name | Sell_Price | 1000002098 | 4CYTE 100gm | 49.777 | 1000002121 | Advance Canine Democare | 37.817 | 1000001009 | Advance Cat Weight Control | 39.013 | 1000001010 | Advance Cat adult/senior | 40.3 | 1000001737 | Advance Dermcare Canine | 82.732 | 1000001014 | Advance Dog Large Breed | 68.809 | 1000001638 | Advance Dog Adult | 36.01 | 1000001012 | Advance Dog Adult/Weight | 31.317 | 1000001013 | Advance Dog Puppy Growth | 36.01 | 1000001859 | Advance Dog Senior/Mature | 33.267 | 1000002418 | Advance Kitten | 39.663 | 1000001015 | Advance Puppy Plus | 33.774 | | |
| Ref_Number | Name | Sell_Price | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000002098 | 4CYTE 100gm | 49.777 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000002121 | Advance Canine Democare | 37.817 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001009 | Advance Cat Weight Control | 39.013 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001010 | Advance Cat adult/senior | 40.3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001737 | Advance Dermcare Canine | 82.732 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001014 | Advance Dog Large Breed | 68.809 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001638 | Advance Dog Adult | 36.01 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001012 | Advance Dog Adult/Weight | 31.317 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001013 | Advance Dog Puppy Growth | 36.01 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001859 | Advance Dog Senior/Mature | 33.267 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000002418 | Advance Kitten | 39.663 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1000001015 | Advance Puppy Plus | 33.774 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="F9 : Values Before Update"/> <input type="button" value="F10 : Values After Update"/> <input type="button" value="F12 : Apply Changes"/> <input type="button" value="ESC : Lose Changes"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |