

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.

The screenshot shows the 'General' tab for a product named 'Advance Dog Dental Lge Breed (3kg)' (Product# 1/9591). The interface includes a top navigation bar with tabs: 1: General, 2: More, 3: Stock, 4: Discs, 5: Complex, 6: History, 7: Stats, and 8: Doc Mgr. The main form is divided into several sections:

- Product Information:** Name (Advance Dog Dental Lge Breed), Size (3kg), Class (Retail), Printed Name, Category-1 (C/AFOOD), Category-2 (C/AFOOD DOG), Anm Types (*ALL*), Action (None), Rem Type, Label Type (No Label), Def. Label, Restricted, Pref. Supplier (S V S Veterinary Supplies Ltd...), Status (Active), User Code (ADVANCEDOG), Complex (Not Cplx), Certificate, Handout, and Reporting (No).
- Pack Prices (Exc Tax):** List Price (\$24.5900), Buy Discount 1 (% = \$24.5900), Buy Discount 2 (% = \$24.5900), Buy Discount 3 (% = \$24.5900), Buy Size (1), Avg Cost (\$26.09).
- Prices (Inc Tax):** Units, Unit Cost (\$30.00), Unit Sell (\$40.68), Pack Sell Price (\$40.68), Dose Size (1), Dose Cost (\$30.00), Dose Sell (\$40.68).
- Price Scheme:** List + Markup. List Price (\$24.5900), Markup (43.85%), Sell Price (\$35.37), Margin (30.49%).
- Image Upload:** A button labeled 'Right click to add a product image...' with a red pushpin icon.

The bottom of the window features a toolbar with navigation icons, a search bar, and a status bar showing 'AF3 : Exit'.

Name

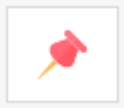
The product name is used as the basic identifier when looking up products and services. **Do not** start a product name with a numeric value. E.g. Use 'Tablet 1/2' as opposed to '1/2 Tablet'.

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. Euthanasia - When a product with this action is billed, it will automatically ask the user whether to mark the patient as deceased and inactive. De-Sex - When a product with this action is billed, it will automatically mark the patient as desexed. 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 a 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	This is a specific default label that will be printed when this product is added as an item to a bill. 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.
Restricted	This is a product restriction group for PAR/ RVM/ Schedule Drugs. TIP: To add and setup Restriction Groups go to the Option Pick List Setup Product Product Restriction .
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	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. This option is enabled if you use New Pricing Screen (Can be changed under the Option Setup Product Use New Pricing Screen . 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.
List Price	The Price of the product exclusive of GST, and exclusive of any discount you receive from your supplier.
Buy Discount 1/ 2/ 3	The discount percentage that is received when the product is 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>
Red Pin 	The ' Red Pin ' 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.

The screenshot shows the 'More' tab for a product. The title bar reads 'Advance Dog Dental Lge Breed (3kg) (Product# 1/9591)'. The tabs at the top are: 1: General, 2: More (selected), 3: Stock, 4: Discs, 5: Complex, 6: History, 7: Stats, 8: Doc Mgr.

Fields in the 'More' tab include:

- Round Sell: On Product (dropdown), To: 1 (text box)
- Buy GST: GST (dropdown)
- Sell GST: GST (dropdown)
- Caution: (text box)
- Use Expiry: No (dropdown)
- Barcode: (text box)
- Category-3: Mars (dropdown)
- Manufacturer: (text box)
- Category-4: Default (dropdown)
- Franchise: (text box)
- Category-5: Default (dropdown)
- BAM KPI: Default (dropdown)
- Export To: (text box)
- Prescription Grp: (dropdown)
- Link to Diary Reason(s): (button)
- History: (text box)

Below these fields is a section titled 'Apply price changes on Purchase Invoice entry' with options for 'Update List Price when new Buy Price exceeds' (No) and 'Update Sell Price when' (Percent) change to List Price is greater than 0.00% or less than 0.00%.

Below that is a section titled 'GL Codes' with dropdowns for Sales (Inc), Cost of Sales (Exp), and Stock on Hand (Ast).

The bottom of the window shows a navigation bar with icons and text: 'By_Number', 'Menu', and '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

	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	<p>A: Mobile -> Tick this if you require this item to be uploaded to devices for Mobile billing.</p> <p>B: Web -> N/A</p> <p>C: SFS -> Tick this if you require this item to be uploaded to Smart Flow Sheet.</p>
Barcode	<p>This field determines whether a barcode will be printed when this product is receipted. There are three options;</p> <p>N: No Label: Does not print a Label. E.g. The product already has a manufacturer's barcode on it.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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 storeroom 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> <p>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.</p>
Manufacturer	Used to specify the manufacturing supplier.
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. TIP: 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.

Advance Dog Dental Lge Breed (3kg) (Product# 1/9591)

1 : General2 : More3 : Stock4 : Discs5 : Complex6 : History7 : Stats8 : Doc Mgr

Stock

Stk Movement

Store				January		February		March		April	
Store	Current	Stop Buy	Stop Sales	Min	Max	Min	Max	Min	Max	Min	Max
Takapuna	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
Milford	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000
Glenfield	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
VANA	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
VANB	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
HW- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
IW- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
MT- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
RH- TRUCK	1.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
RS- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
MM- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
RMZ- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
PE- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
CR- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
HT- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
MF- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
JW- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
HOY STORE	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
AT- TRUCK	0.00000	<input type="checkbox"/>	<input type="checkbox"/>	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000

</

Stock

Store	This is the store name that stocks this item
Current (Pack) / Stock OH	The stock on hand for a store.
Stop Buy	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".
Stop Sales	The stock item will not be able to be sold if this is ticked.
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.
Batch	Current batch number that is recorded at billing.
Expiry Date	Expiry date of current batch number that is recorded at billing.
Stock Used	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. Tip: To configure which quantity you wish to display go to Options Setup Product Reset Stock Used on Receipt .
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.
Bin / Aisle	The current location of this product on your shelves. This is used when generating stock take sheets.

Specials

Not Implemented

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.

Client Discounts

Num	Disc Name	Disc %	Disc Sell	Bonus Pt	ID %	ID Sell
0	Normal	%	\$50.00	1,000	10%	\$45.00
1	Platinum	%	\$50.00	1,000	%	\$50.00
2	Gold	%	\$50.00		%	\$50.00
3	Silver	%	\$50.00		%	\$50.00
4	Bronze	%	\$50.00		%	\$50.00
5	20	%	\$50.00		%	\$50.00
6	Bonus	%	\$50.00		%	\$50.00
7	L8	%	\$50.00		%	\$50.00
8	B_Test1	%	\$50.00		%	\$50.00

Quantity Discounts

Num	Qty	Disc %	Sell
0	0	%	\$50.00
1	2	%	\$50.00
2	4	%	\$50.00
3	0	%	\$50.00
4	0	%	\$50.00
5	0	%	\$50.00
6	0	%	\$50.00
7	0	%	\$50.00
8	0	%	\$50.00

Variable Pricing (Unit Price)

Num	Description	Unit Price (Excl.)	Unit Price (Incl.)
1	Consult Cat	\$43.48	\$50.00

Navigation: By_Order, By_Number, Menu, 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 %	The amount of discount a particular discount group receives.
Disc Sell	The retail price after the discount has been applied.
Bonus Pts	The amount of bonus points that discount group will receive for purchasing this product.
ID %	The amount of discount a particular discount group receives when their account is paid on time.
ID Sell	Retail price after the incentive discount has been applied.

Quantity Discounts

These are discounts allocated according to the product quantities purchased.

Variable Pricing (Unit Price)

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.

Advocate Cat Large Single (vial) (Product# 1/8350)

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

Complex Product Type: KitSet Num Comps: 2

Price/Disc from Comps: Yes
 Print on Bill: Master
 Print on Stmt: Master
 Print Comp Price on Bill: No
 Print Comp Price on Stmt: No
 Hide Comp On Billing Screen:
 Hide Comp Price on Billing Screen:
 Pre-Edit Comp when Billing: 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
6. Will not prompt changing item properties while adding to bill

* Order	Description	Qty	Price
> 1	Advocate Cat Large	0.333	\$16.27
2	Dispensing Fee 3	0.25	\$2.50

Sell Price \$18.770

IK < > >> + - Add Message Fix Components Change Component

IK < > >> By Number Menu 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.

Bill Date	Stock Date	Store	Qty (Unit)	Sell Price	Staff	Bill Num	Cost Price	Discount
30/05/2022	30/05/2022	East Coast B...	1.000	\$53.72	SG	1/604323	\$31.6400	\$0.
22/03/2022	22/03/2022	East Coast B...	1.000	\$53.72	SG	1/598754	\$30.9100	\$0.
13/01/2022	13/01/2022	East Coast B...	1.000	\$51.67	SJ	1/593073	\$30.4300	\$0.
31/12/2021	31/12/2021	East Coast B...	1.000	\$51.67	SJ	1/592186	\$30.4300	\$0.

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.

Bill Date	Stock Date	Store	Qty (Unit)	Sell Price	Staff	Bill Num	Cost Price	Discount
30/05/2022	30/05/2022	East Coast B...	1.000	\$53.72	SG	1/604323	\$31.6400	\$0.
22/03/2022	22/03/2022	East Coast B...	1.000	\$53.72	SG	1/598754	\$30.9100	\$0.
13/01/2022	13/01/2022	East Coast B...	1.000	\$51.67	SJ	1/593073	\$30.4300	\$0.
31/12/2021	31/12/2021	East Coast B...	1.000	\$51.67	SJ	1/592186	\$30.4300	\$0.

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.

* Date	Store	Qty	Sell (Ex)	GST	Sell (Inc)	Last Name	First Name	Patient	Id	C
> 25/01/2023	East Coast Bays	0.5	4.46	0.67	5.13	Fairgray	Katie And James	Pipi	CB	
25/01/2023	East Coast Bays	1	8.92	1.34	10.26	Mcquinlan	Kelly	Raven	CB	
24/01/2023	East Coast Bays	1	8.92	1.34	10.26	Arthur	Frances	Rufus	KS	
24/01/2023	East Coast Bays	1	8.92	1.34	10.26	Lee	Stella	Tigger	CB	
24/01/2023	East Coast Bays	1	8.92	1.34	10.26	Lee	Stella	Choc	CB	
24/01/2023	East Coast Bays	1	8.92	1.34	10.26	Lee	Jane	Aria	CB	
24/01/2023	East Coast Bays	1	8.92	1.34	10.26	Lee	Jane	General	CB	
21/01/2023	East Coast Bays	0.5	4.46	0.67	5.13	Beagle	Rob	Sammy	CB	

Orders Tab

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

Order Date	Num	Size	Qty	Qty BO	Code	Buy (Excl)	Status	Store
> 29/12/2022	1/8517	1	3.000	0.000	13202	\$32.09	Received	East Coast ...
16/12/2022	1/8510	1	3.000	0.000	13202	\$32.09	Received	East Coast ...
1/12/2022	1/8501	1	1.000	0.000	13202	\$32.09	Received	East Coast ...
14/11/2022	1/8487	1	4.000	0.000	13202	\$30.73	Received	East Coast ...
13/10/2022	1/8470	1	4.000	0.000	13202	\$30.73	Received	East Coast ...

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'**.

Advantage Kitten/ <4kg 6 Pack (Product# 1/3950)

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

Sales Orders Received Price History

Inward Goods Transactions

Date Range [] [] Show Last 15 Search

Date Arrived	Num	Store	Buy Size	Packs Arrived	Bonus Arrived	Price / Pack	Discount	Status	Type
> 17/05/2022	1/352...	East Coast ...	1	2.000	0.000	\$39.1400	\$0.0000	Acct Updat...	Purchas
31/03/2022	1/351...	East Coast ...	1	-1.000	0.000	\$38.2400	\$0.0000	Fully Paid	Stock
22/02/2022	1/347...	East Coast ...	1	2.000	0.000	\$39.1400	\$0.0000	Acct Updat...	Purchas
28/01/2022	1/346...	East Coast ...	1	2.000	0.000	\$37.6400	\$0.0000	Acct Updat...	Purchas
24/12/2021	1/344...	East Coast ...	1	-0.547	0.000	\$37.6400	\$0.0000	Fully Paid	Stock
3/12/2021	1/343...	East Coast ...	1	1.000	0.000	\$37.6400	\$0.0000	Acct Updat...	Purchas
31/03/2021	1/336...	East Coast ...	1	0.600	0.000	\$37.6400	\$0.0000	Fully Paid	Stock

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 From 27/01/2010 Date To 15/03/2023 Staff [] Supplier Provet N Z Pty Ltd ...

* Date	Qty	List (Ex)	GST	Buy (Inc)	Trn #	Supplier	Id	Supp #
> 22/11/2011	2	0	-7.47	57.27	# 1/56448	Provet N Z Pty Ltd	TR	# 1/227
11/11/2011	3	0	-11.21	85.91	# 1/56070	Provet N Z Pty Ltd	RC	# 1/227
17/11/2010	2	0	-6.87	52.67	# 1/46222	Provet N Z Pty Ltd	TR	# 1/227
11/11/2010	2	0	-6.78	51.98	# 1/46049	Provet N Z Pty Ltd	RC	# 1/227

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**.

Advantage Kitten/ <4kg 6 Pack (Product# 1/3950)

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

Sales Orders Received Price History

Price Options

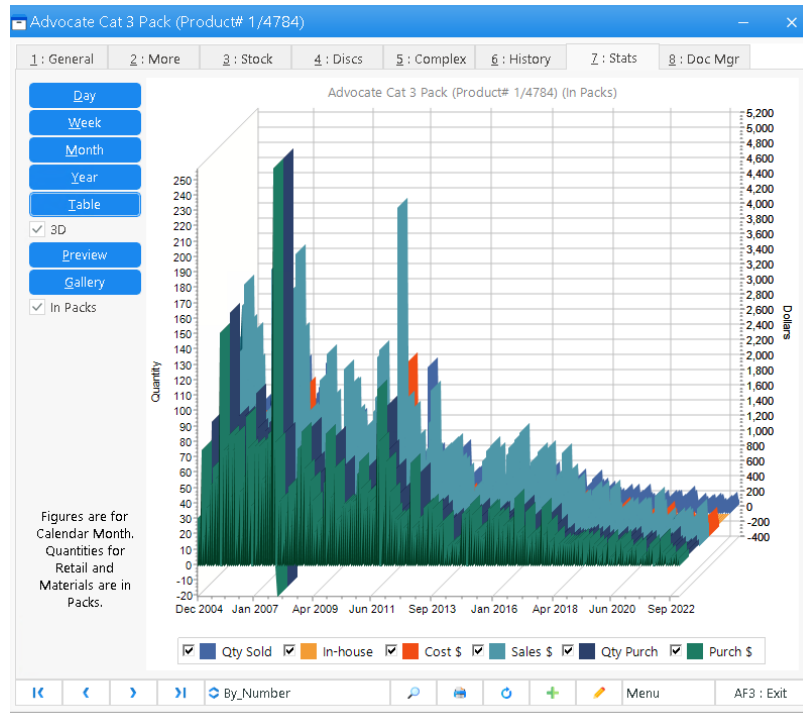
☒ All ☒ List ☒ Sell ☒ Unit ☒ Average ☒ Markup

Date Range 25/01/2023 25/01/2023 Show Last 15 Search

Date	Reason	Staff	Last Cost	List Price	Unit Sell (Incl)	Pack Sell (Incl)	Avg Cost	Markup (%)	Unit S (Excl)
>	Current		\$39.140	\$39.140	\$76.480	\$76.480	\$39.140	69.909	€

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.



Advocate Cat 3 Pack (Product# 1/4784)

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

Day
Week
Month
Year
Graph
In Packs

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

Advocate Cat 3 Pack (Product# 1/4784) (In Packs)

Date	Qty Sold	Qty In-House	Qty Purchased	Sales	Cost	Purchases	Store
Jan 2023	0.000	0.000	3.330	\$0.00	0	\$106.8600	East Coa
Jan 2023	3.000	0.000	0.000	\$187.44	93.33	\$0.0000	East Coa
Dec 2022	0.000	0.000	6.000	\$0.00	0	\$192.5400	East Coa
Dec 2022	8.000	0.000	0.000	\$494.58	247.57	\$0.0000	East Coa
Nov 2022	0.000	0.000	4.000	\$0.00	0	\$128.3600	East Coa
Nov 2022	5.000	0.000	0.000	\$294.15	153.25	\$0.0000	East Coa
Oct 2022	0.000	0.000	4.000	\$0.00	0	\$122.2400	East Coa
Oct 2022	6.000	0.000	0.000	\$358.98	183.96	\$0.0000	East Coa
Sep 2022	0.000	0.000	2.000	\$0.00	0	\$61.4600	East Coa
Sep 2022	2.330	0.000	0.000	\$139.40	71.43	\$0.0000	East Coa
Aug 2022	0.000	0.000	2.000	\$0.00	0	\$61.4600	East Coa
Aug 2022	2.000	0.000	0.000	\$114.66	61.3	\$0.0000	East Coa
Jul 2022	0.000	0.000	5.000	\$0.00	0	\$153.6500	East Coa
Jul 2022	4.000	0.000	0.000	\$229.32	122.57	\$0.0000	East Coa
Jun 2022	0.000	0.000	6.000	\$0.00	0	\$184.3800	East Coa
Jun 2022	6.330	0.000	0.000	\$373.39	193.77	\$0.0000	East Coa
May 2022	0.000	0.000	12.000	\$0.00	0	\$366.7200	East Coa
May 2022	7.000	0.000	0.000	\$396.50	213.92	\$0.0000	East Coa
Apr 2022	0.000	0.000	3.000	\$0.00	0	\$91.6800	East Coa
Apr 2022	5.000	0.000	0.000	\$285.66	146.44	\$0.0000	East Coa
Mar 2022	0.000	0.000	2.660	\$0.00	0	\$75.6600	East Coa

By_Number Menu 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 **'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'** or **'Enter'** key on the line you wish to select to open the record.
 - b. To browse the Item without closing the search window click **'Browse'**.

for Viewing/maintenance														
Search Text														
Search for Product Id, Product Name or Product Code.														
F3	Accept	Cancel	New		Advanced		Retry		Browse					
* Num	Name	Size	Class	Status	Avg. Cost	Code	Sell (Excl.)	Sell (Incl.)	Dose Sell (Excl.)	Dose Sell (Incl.)	Unit Sell (Excl.)	Unit Sell (Incl.)	Buy Size	Supplier
> # 1/6211	142Lab: Histo: Multiple Tissue Extra		S	Active		0 LABHIS...	123.478	142	123.478	142	123.478	142	1	
# 1/7998	3.5mm Locking Self Tap	20mm	M	Active	36	35LST	54	62.1	54	62.1	54	62.1	1	Veterinary Ortho
# 1/8366	4Cyte Canine	100g	R	Active	60.19	4CC	90.285	103.83	90.285	103.83	90.285	103.83	1	Provet
# 1/8174	4Cyte Dog Gel 100ml		R	Active	41.39	4DG100	65.085	74.85	65.085	74.85	65.085	74.85	1	Provet
# 1/6775	4 In 1 Carpet Cleaning	500ml	R	Active	10.95	FLEATI...	21.9	25.19	21.9	25.19	21.9	25.19	1	Bradfields Ltd
# 1/2268	8Nail Clippers Small/Medium	SM	R	Active	7.67	BA515	15.34	17.64	15.34	17.64	15.34	17.64	1	Masterpet Corp
# 1/5940	A4 Paper		M	Active	5.2	A4PAP...	28	32.2	5.6	6.44	5.6	6.44	5	Office Products

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 **'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'** or **'Enter'** key on the line you wish to select to open the record.
 - b. To browse the Item without closing the search window click **'Browse'**.

for Viewing/maintenance

Number: Category 1:

2 Soundex: Category 2:

3 Name: ADVAN ☒ Contains Category 3:

User Code: Category 4:

Sup. Code: Category 5:

Class: All Status: Active

Complex Type: All

Notes: ☐ Any word ☐ Only Ann Type Products

☐ Products with Invalid GL

F3 Accept Cancel New Simple Retry Browse

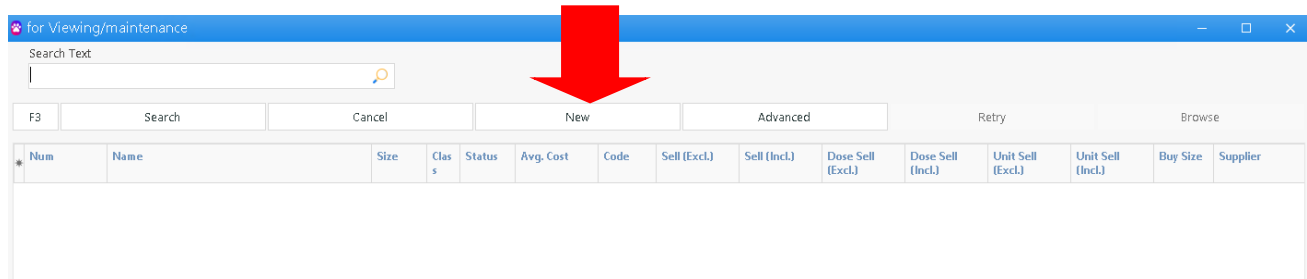
#	Num	Name	Size	Class	Status	Avg. Cost	Code	Sell (Excl.)	Sell (Incl.)	Dose Sell (Excl.)	Dose Sell (Incl.)	Unit Sell (Excl.)	Unit Sell (Incl.)	Buy Size	Supplier
>	# 1/3293	Advantage Kitten / < 4kg 4pack		R	Active	28.772	ADVS...	50.475	58.05	50.475	58.05	50.475	58.05	1	S V S Vet Suppl
	# 1/3292	Advantage Cat 4 Pack		R	Active	29.121	ADVA...	50.507	58.08	50.507	58.08	50.507	58.08	1	S V S Vet Suppl
	# 1/3951	Advantage Cat 6 Pack		R	Active	39.894	ADVPA...	69.785	80.25	69.785	80.25	69.785	80.25	1	S V S Vet Suppl
	# 1/5112	Anaesthesia: Advanced Monitoring		S	Active	0	ANAE...	39.13	45	39.13	45	39.13	45	1	
	# 1/3296	Advantage Dog 10-25kg 4 Pack		R	Active	32.074	ADVLA...	56.358	64.81	56.358	64.81	56.358	64.81	1	S V S Vet Suppl
	# 1/3422	Advantage Dog >25kg 4 Pack		R	Active	31.867	ADV25...	56.42	64.88	56.42	64.88	56.42	64.88	1	S V S Vet Suppl
	# 1/5419	Advantage Dog >25kg 6 Pack		R	Active	47.32	ADVA ...	82.807	95.23	82.807	95.23	82.807	95.23	1	S V S Vet Suppl

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.

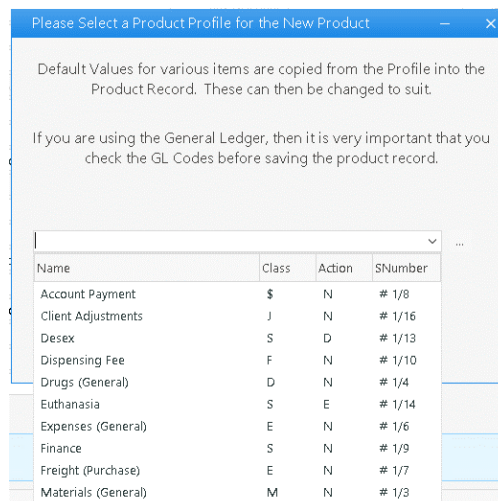
HOW TO ENTER NEW GOODS OR SERVICES

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



The screenshot shows a window titled 'for Viewing/maintenance'. It has a search bar at the top with a magnifying glass icon. Below the search bar is a toolbar with buttons: 'F3', 'Search', 'Cancel', 'New', 'Advanced', 'Retry', and 'Browse'. A red arrow points to the 'New' button. Below the toolbar is a table with columns: 'Num', 'Name', 'Size', 'Class', 'Status', 'Avg. Cost', 'Code', 'Sell (Excl.)', 'Sell (Incl.)', 'Dose Sell (Excl.)', 'Dose Sell (Incl.)', 'Unit Sell (Excl.)', 'Unit Sell (Incl.)', 'Buy Size', and 'Supplier'.

2. Click on the **'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 dialog box titled 'Please Select a Product Profile for the New Product'. It contains the following text: 'Default Values for various items are copied from the Profile into the Product Record. These can then be changed to suit.' and 'If you are using the General Ledger, then it is very important that you check the GL Codes before saving the product record.' Below the text 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
Freight (Purchase)	E	N	# 1/7
Materials (General)	M	N	# 1/3



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 (Pencil icon).
6. Once the product details have been modified save the changes by clicking on the tick in the bottom right-hand corner.

Adaptil Refill (48ml) (Product# 1/4891)

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

Name	Adaptil Refill	Pack Prices (Exc Tax)		Price Scheme	List + Markup
Size	48ml	List Price	\$36.4500	List Price	\$36.4500
Class	Retail	Buy Discount 1	- % = \$36.4500	Markup	+ 40%
Printed Name		Buy Discount 2	- % = \$36.4500	Sell Price	= \$51.03
Category-1	OTC	Buy Discount 3	- % = \$36.4500	Net Cost	
Category-2	Default	Buy Size	1	Margin	28.57%
Ann Types	*ALL*	Avg Cost	\$36.45		
Action	None	Prices (Inc Tax)			
Rem Type		Units		Dose Size	1
Label Type	No Label	Unit Cost	\$41.92	Dose Cost	\$41.92
Def. Label		Unit Sell	\$58.68	Dose Sell	\$58.68
Restricted		Pack Sell Price	\$58.68		
Ref. Supplier	S V S Vet Supplies Ltd				
Status	Active				
User Code	DAPREFILL				
Complex	Not Cplx				
Certificate					
Handout					
Reporting	No				

Right click to add a product image...

By Number Menu AF3 : Exit



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.

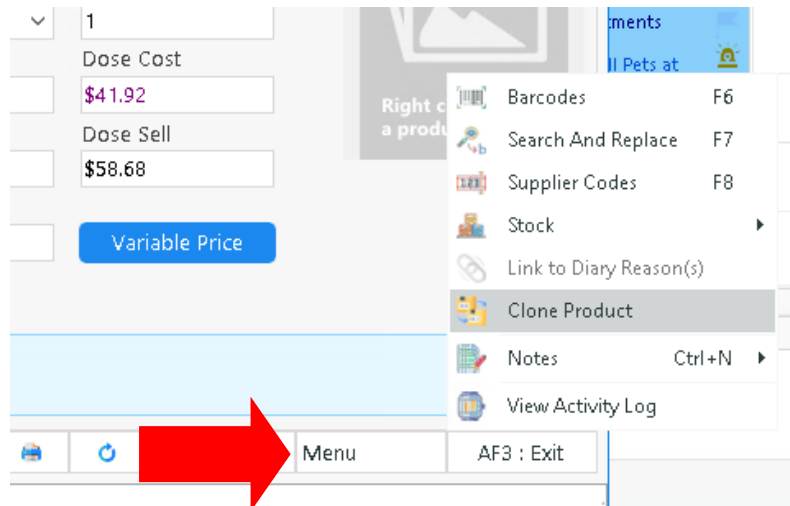
ADDING PRODUCT CATEGORIES

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.

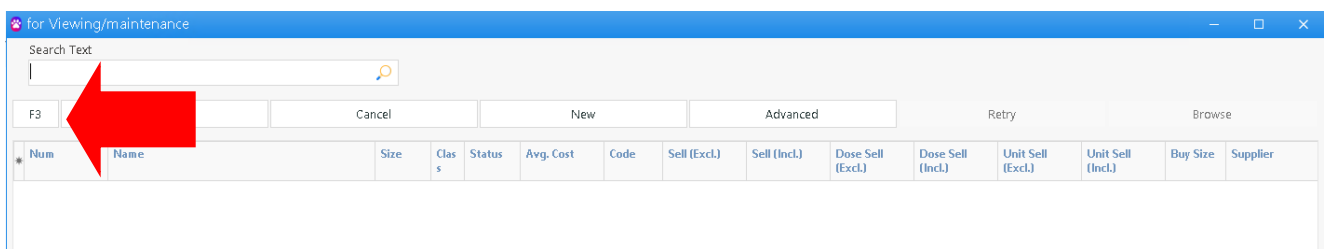
CLONING PRODUCTS

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 **'Menu'** button on the bottom of any product record.



MOST RECENTLY USED LIST

The F3 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.

Materials (General) (Profile for Goods & Services)

Name: Materials (General) Class: Material Status: Active Number: 1/3

1 : General

Buy Tax 1: GST Buy Tax 2: Buy_Tax__1

☐ Tax 2 on Tax 1

Sell Tax 1: GST Sell Tax 2: Sell_Tax__1

☐ Tax 2 on Tax 1

Pref Supp: ...

Rounding: 1

2 : Misc

Category 1: Default Category 2: Default Category 3: Default Category 4: Default Category 5: Default

BAM KPI: Default Reporting: No

Accept Cancel

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.

The screenshot shows the 'Search And Replace in Products' window with the 'Search Criteria' tab selected. The window has three tabs: 'Search Criteria', 'Values To Modify', and 'Apply'. The 'Search Criteria' tab contains a section titled 'Search For Following Products' with five categories: Class, Category 1, Category 2, Complex, and Category 3, 4, and 5. Each category has a radio button for 'All' and a radio button for 'Select'. Under 'Class', 'Material' is selected. Under 'Category 1', 'BP Drug 10' is selected. Under 'Category 2', 'Anaesthesia' is selected. Under 'Complex', 'Not Cplx' is selected. Under 'Category 3', 'Default' is selected. Under 'Category 4', 'Default' is selected. Under 'Category 5', 'Default' is selected. A note at the bottom states: '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

Price

List Price (By %)

Cost Price (By %)

Sell Price (By %)

Markup (To %)

BuyDiscount (To %)

Category 1 To

Category 2 To

Category 3 To

Category 4 To

Category 5 To

Category 6 To

ReminderType To

Label Type To

Supplier To

Status To

Class To

Sales GL To

Cost GL To

Asset GL To

To Web To

To Mobile To

Values To Modify

Sell Price Rounding

Round Sell Prices to

Discount

Name	Discount To %	Incentive Disc To %	Bonus Pts Value	Bonus Pts To
> Nor...				
Bon...				
Gold				

Add / Remove from Store

Add To Store

Remove From Store

Set Min/Max Stock

☐ Set Minimum and Maximum Stock

Select Branch ☐ Use sales from all stores

Select Store

Use Sales From Month

% of Sales for Minimum Stock

% of Sales for Maximum Stock

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

Values To Modify

Staff

Ref_Number	Name	Sell_Price	Label_Type
10000004640	10000004640	0	N
10000004703	10000004703	0	N
10000006276	Cisapride Capsules	0	N
10000008293	Drug Fee Labeling	10.421	N
10000005657	Injection Fee I V	15.965	N
10000005870	Injection Rabbit Fee	8.426	N
10000008201	Law Debt Fees	0	N
10000007526	Q Card Adin Fee New Card	44.347	N
10000007525	Q Card Admin Fee Cardholder	31.043	N
10000004553	XRAY: First Two Views Digital	164.087	N

ADDING HISTORY TEMPLATES

You can assign history templates to products. When a product with a history template is added to a bill, the product's associated history template is added to the history associated with the bill.

Creating History Templates

1. Go to **Options | Picklists | History | History Templates**.
2. Create new template by selecting the green **+** icon.
3. Select the type of form you want to use for the template and add a summary so you can identify the template, then click **Accept**.
4. Edit the form to your specifications, then click **Accept**.

Adding History Template to Product

1. Go to the product you would like to add a history template to.
2. Select the **'More'** tab.
3. Select the 3 dots near the **'History'** heading.

The screenshot shows the 'Revolution Cat (3's) (Product# 1/9153)' form. The 'More' tab is active. The 'History' section is highlighted with a red box, showing a search box and a green tick icon. The form includes various fields for product details, GST, and GL codes.

4. A search box will appear. You can search for any pre-created history templates to add to the product.
5. Select required template and save by clicking the green tick.

Using Product History Templates

When you add a product that has a history template attached, a dialogue box will open with the history template to either add (**Accept**) or discard (**Cancel**).