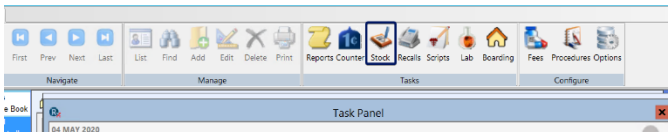
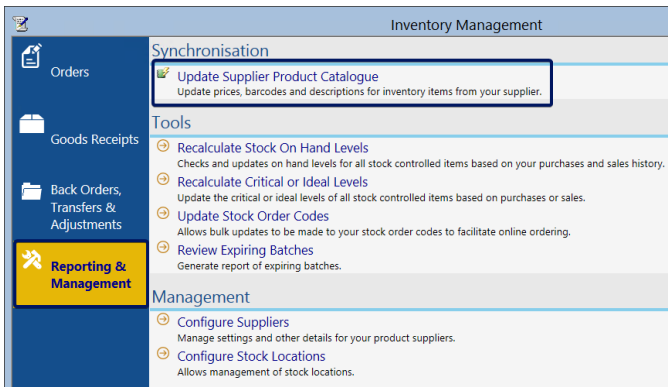


# Back on Track - Stock

RxWorks



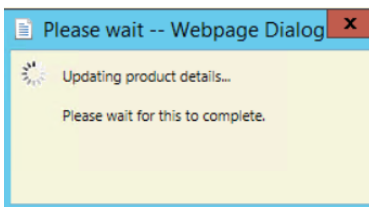
- This guide will take you through a few areas surrounding stock in RxWorks.
- From your task panel, click **Stock** from the top ribbon bar.



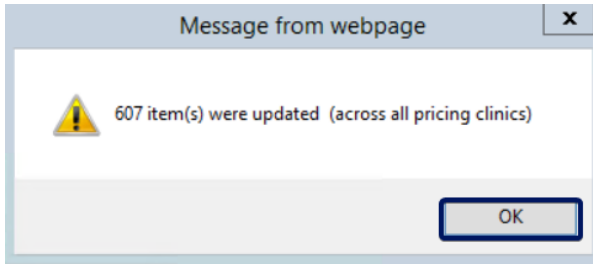
- The **price updates** are normally set up to automatically update your prices for you as soon as the price file from the integrated wholesaler has been received.
- If you don't have it set to automatically update the prices and you have not updated them since the beginning of the lockdown, I'll walk you through how to do this. (You can still follow these steps if you do have it setup, just for peace of mind that it has still been applying the prices).
- Select **Reporting & Management** from left-hand side and then click on **Update Supplier Product Catalogue**.



- The date below the **Supplier** name indicates when the last price update was applied, whether that be automatically or manually.
- If you do your price updates manually and it still shows as a previous date, you will need to press **Download Latest & Import**. It will take a minute or two to download.



- This window will appear on screen to show you that the price list is being downloaded.



- Once the price list has been downloaded, you will see this window which shows you how many items have been updated.
- Click on **OK** when you are ready to move on.

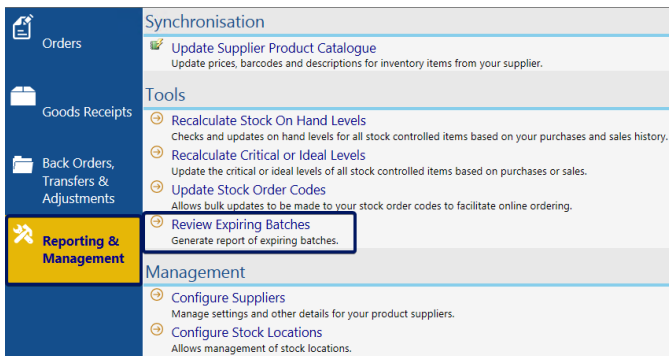
Below are the prices that have changed for the current pricing clinic. Make any updates required, then click Confirm.

Code	Name	Date	Original £	New £	Change
821	Ap 10mg Tab	04/05/2020	£0.28	0.32	£0.04 (15.6%)
829	Ap 2mg Inj	04/05/2020	£4.72	5.56	£0.84 (17.7%)
8148	Activated Charcoal 1 ltr	04/05/2020	£0.01	0.01	£0.00 (-24.2%)
7016	aDAP1 Dog Spray 60 ml	04/05/2020	£17.99	19.46	£1.47 (8.2%)
9030	Adactil Express Tablets (10)	04/05/2020	£6.86	7.23	£0.35 (5.1%)
8886	Adactil Tablets (40)	04/05/2020	£25.23	27.30	£2.07 (8.2%)
9545	Adrenacrine 100ml	04/05/2020	£0.04	0.06	£0.02 (53.3%)
8581	Advocate 4-Sig Small Cat 3 Pipette	04/05/2020	£14.67	16.02	£1.35 (9.2%)
8725	Advocate 4-10kg Med Dog 6 Pipette	04/05/2020	£30.06	32.51	£2.45 (8.2%)
8384	Advocate 4-8kg Large Cat 3 Pipette	04/05/2020	£14.29	16.38	£2.09 (14.6%)
8845	Aggrinin Smarttrace Plus 24-7 (10)	04/05/2020	£4.41	4.69	£0.28 (6.3%)
8506	Aurivict 1 Med/Large Dog 1 (80)	04/05/2020	£7.43	8.45	£1.02 (13.7%)

Options: ☐ Print Price List

Back Confirm

- A list of all the products that have been adjusted will display for you to have a look at.
- If you wish to change the cost price, you can in the **New** column. If you are happy to leave the prices as they are, either **print** and then press **confirm** or just press **Confirm** to close the window.



- The quantity of stock that you would have dispensed over the last few months will be a lot less than usual. This could result in having items that are close to their use by date.
- If you are using batch control on your stock, you can run a report to search for items that have a close expiry date.
- Click **Stock, Reporting & Management** and then **Review Expiring Batches**.

**Expiring Batches**

Preview | Print | Export | Excel | PDF | Flag | Setup | Tags | Cancel

This report shows all items and their batch numbers that have an expiry in the date range. It runs for a single stock location to show the stock levels in that stock location.

Date Range: Other (dropdown), 01/03/2020 (calendar), 04/05/2020 (calendar)

Stock Location: Evergreen Veterinary Hospital (dropdown)

- Select the date range you would like to search for from the drop-down list or select **Other** to manually type in your own date range.
- Select the **Stock Location** you need. This could either be set as per branch or per area in the practice depending on your configuration.
- Select the output method of your choice from the top ribbon bar, i.e. PDF or Excel.

Scripting... expiring batches

Batches that will expire from 01/04/2006 until 04/05/2020

Item Code	Item Name	Stock Level	Batch Number	Expiry Date	Location Name
606970	Advantage Blue Dog - 25kg x 6	16.0	4585	31/07/2019	Evergreen Veterinary Hospital
603316	Levulin Tabs 250mg (250)	0.0	4567337	01/01/2008	Evergreen Veterinary Hospital
603316	Levulin Tabs 250mg (250)	0.0	C 876767	01/06/2008	Evergreen Veterinary Hospital
2307	Frontline Spot On Dog L 3 Pk	0.0	4487558	31/08/2019	Evergreen Veterinary Hospital
600281	Heartworm microfilaria	15.0	22581437	31/07/2019	Evergreen Veterinary Hospital

- You will get a list of all items within your chosen date period with their item number, batch number and expiry date.

Inventory Management

Orders

Goods Receipts

**Back Orders, Transfers & Adjustments**

Reporting & Management

Back Orders

- Manage Back Orders (270)  
View and delete items that are currently on order from your suppliers.
- Print Back Orders  
Produce a report of items that are currently on order from your suppliers.

Stock Location Transfers

- Inventory Transfers  
Move inventory between different stock locations.
- Print Transfer Summary  
Provides a printed summary of transfers between stock locations.

Adjustments & Stock Takes

- Enter New Adjustments  
Adjust inventory levels after a physical count.
- Review Adjustments  
Review and change previous adjustment entries.
- Import/Manage Adjustments From File or PDT  
Add or edit adjustments from an existing stock take sheet or an external PDT terminal.
- Print Adjustment Summary  
Provides a printed summary of your stock level adjustments.

- You may want to do a stock take of all the products you have within the clinic or you may just want to do a mini stock take per section as and when you have time. To do this you can either use an excel spreadsheet or use the adjustment section within RxWorks for live changes.
- I'll first take you through using the excel spreadsheet method. From **Stock**, click on **Back Orders, Transfers and Adjustments**.
- Click **Enter New Adjustments**.

Inventory Management

STOCK ADJUSTMENTS

Evergreen Veterinary Hospital

Date: 04/05/2020

Item Name and Batch

Units on Hand

Actual

Adjustment

Item Name

Service

Active in Last X Months

Category

Include Deactivated

Search

Advocate Aqua Medium Dog x 6

Advocate Orange Cat/Kitten x 3

Advocate Purple Large Cat x 3

Advocate Purple Large Cat x 6

Advocate Red Large Dog x 6

Diminrol Tabs 500mg (100)

Dronal Cat 250mg Tablets

Dronal Dog 10kg Tabs

Dronal Dog 35kg Tabs

Dronal Plus 200mg Tablets

Endogard Tabs 20kg (100)

Click Mouse & Tick - Click

Back

Create Stocktake Sheet

Save Adjustments

- Fill in the search criteria on the left-hand side and click search. In this example, we have search for all products within the Flea, Worm and Tick Preparations service heading.
- Once the product list has loaded, click **Create Stocktake Sheet**.
- This will open an excel spreadsheet for you to start adding in your current on hand levels.

Inventory Management

Orders

Goods Receipts

**Back Orders, Transfers & Adjustments**

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Adjust inventory levels after a physical count.
- Review Adjustments  
Review and change previous adjustment entries.
- Import/Manage Adjustments From File or PDT  
Add or edit adjustments from an existing stock take sheet or an external PDT terminal.
- Print Adjustment Summary  
Provides a printed summary of your stock level adjustments.

- If you need to close and save the spreadsheet to come back to it later, you can do.
- From **Back Orders, Transfers and Adjustments**, click **Import/Manage Adjustments from File or PDT**.

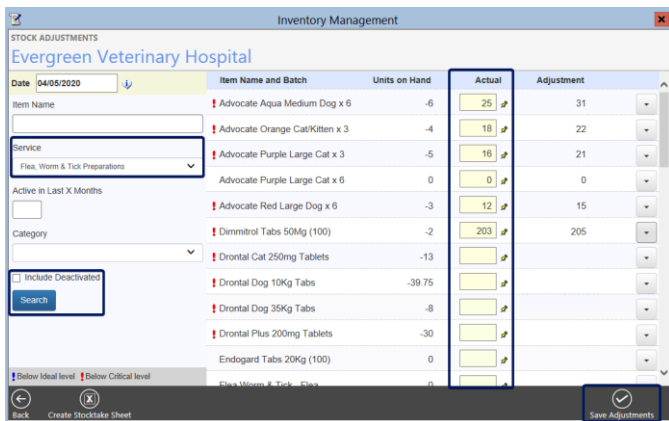
### Manage & Import Existing Stock Take Sheets

Below is a list of existing stock take sheets for your current stock location. Click Edit to continue working with the sheet. Click Import to process the data in the sheet. When importing, all items with an on hand value in the sheet will be updated. Any blank dates are assumed to be for today, and any blank stock location values are assumed as stock location 1.

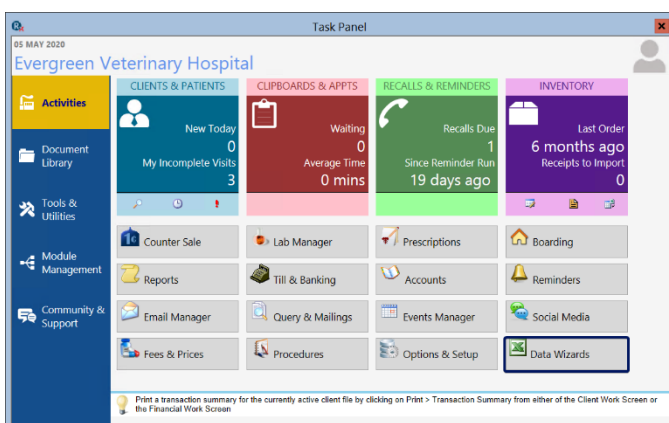
Template	Edit	Import	Size	Modified	Del
Evergreen Veterinary Hospital shaz			384.29K	02/07/2019 11:20:36	
Evergreen Veterinary Hospital			384.29K	02/07/2019 11:20:40	
Evergreen Veterinary Hospital[1]			384.42K	06/04/2020 18:25:28	
Flea and Wormers Stock Take 04052020			1.90K	04/05/2020 10:40:54	
test 290819			384.36K	29/08/2019 14:51:16	

To create a stock take sheet choose [Enter New Adjustments](#), choose the appropriate filter and then choose Create Sheet. To delete an existing stock take sheet, use at the end.

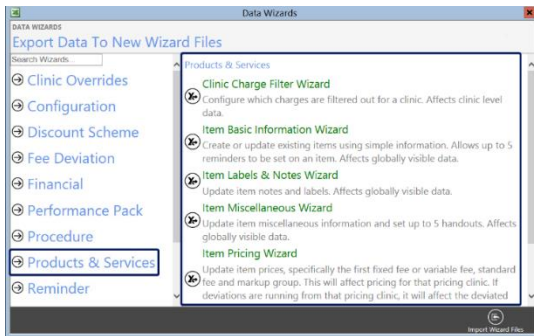
- Each stock take sheet that has been created appears in the top window. If you need to add anything to the spreadsheet, click on icon in the **Edit** column.
- If you need to import the sheet as it is completed, click on the icon in the Import column.
- If you need to delete the sheet because you no longer need it, click on the red **X**.



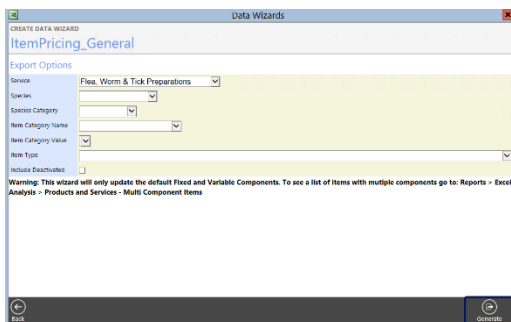
- To instantly update stock levels without the need to upload a spreadsheet, go back to **Back Orders, Transfers and Adjustments** and click **Import/Manage Adjustments from File or PDT**.
- Search for the products via **Item Name** or **Service Heading** and click **Search**.
- You will see that each product within your search criteria will list in alphabetical order. In the **Actual** column, once you have counted that specific product, add in the total and do so for any others. If you have added all the totals you need to, click **Save Adjustments**.
- The new totals you have added in, will immediately be saved against those products.



- Data Wizards are a useful tool to help make multiple changes in one go. They are made up of Excel Spreadsheet with exported data of your choice, i.e Stock information such as labels or dispensing fee choices.
- From the **Task Panel**, click **Data Wizards**.



- Click on **Products & Services**. The right-hand side will change to display all available Data Wizards to do with your stock and services.
- Click on one of the **green titles** to open the search criteria options.

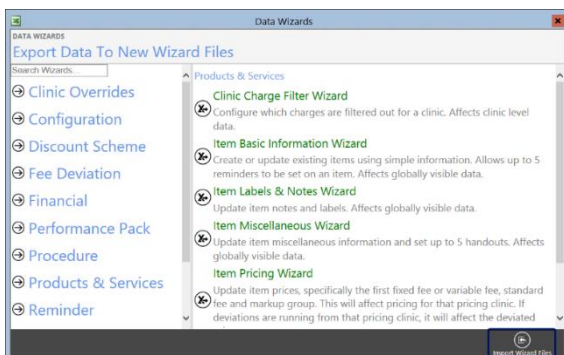


- Select your criteria from the drop-down boxes and click **Generate** when done.

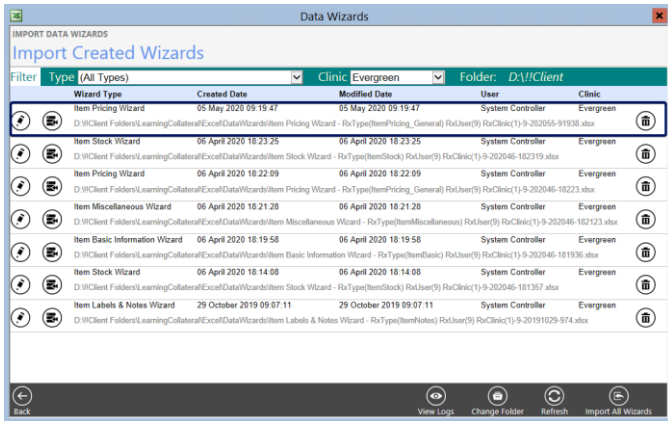
Item Pricing Wizard - created on 05/05/2020 by System Controller (ID: 9)

Item Code	Item Name	Standard Fee For Units	Standard Fee For Packs
606993	Advocate Aqua Medium Dog x 6	Dispensing SA- Label --999777	Dispensing SA- Label --999777
606997	Advocate Orange Cat/Kitten x 3	Dispensing SA- Label --999777	Dispensing SA- Label --999777
606999	Advocate Purple Large Cat x 3	Dispensing SA- Label --999777	Dispensing SA- Label --999777
607000	Advocate Purple Large Cat x 6	Dispensing SA- Label --999777	Dispensing SA- Label --999777
607002	Advocate Red Large Dog x 6	Dispensing SA- Label --999777	Dispensing SA- Label --999777
607140	Dimmitrol Tabs 50Mg (100)	Dispensing SA- Label --999777	Dispensing SA- Label --999777
1262	Dronitrol Cat 250mg Tablets	(none)	(none)
607151	Dronitrol Dog 10Kg Tabs	Dispensing SA- Label --999777	Dispensing SA- Label --999777
607152	Dronitrol Dog 35Kg Tabs	Dispensing SA- Label --999777	Dispensing SA- Label --999777
1238	Dronitrol Plus 200mg Tablets	(none)	(none)
607160	Endogard Tabs 20Kg (100)	Dispensing SA- Label --999777	Dispensing SA- Label --999777
904001	Flea, Worm & Tick - Flea	Dispensing SA- Label --999777	Dispensing SA- Full Pack --999776
904002	Flea, Worm & Tick - Flea & Heartworm	Dispensing SA- Label --999777	Dispensing SA- Full Pack --999776

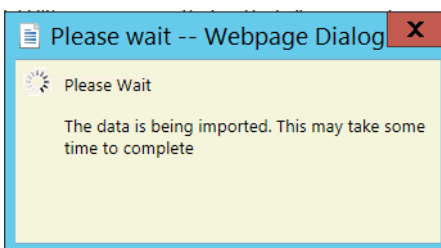
- Depending on which Data Wizard you have chosen, an excel spreadsheet will appear on screen for you with various editable options.
- In this example, if you created a new Dispensing/Injection Fee that you wanted to generate on all your items, you can use the spreadsheet to make the changes to numerous items at once.
- When you have completed the spreadsheet, close the sheet and click **Save**. If you have not completed the spreadsheet, you can still close and save and come back to it later.



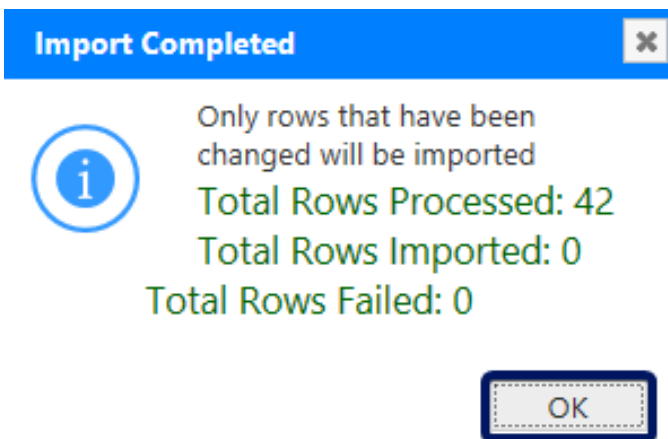
- To import the changes into RxWorks, navigate back to your Data Wizards from your Task Panel.
- Click **Import Wizard Files**.



- The **pencil icon** will allow you to edit the spreadsheet if you need to reopen it.
- The **loading icons** will allow you to import the spreadsheet if you are ready to submit the changes to RxWorks.
- The **bin icon** gives you the option to delete the spreadsheet if you no longer require it.



- Once you have clicked the **import** button, this message will appear on screen to show you it is busy importing the changes.



- Once the import has completed, a progress report window will appear to show you if it has been successful or not. Click **OK** to close this window.