

Back on Track -Stock

RxWorks

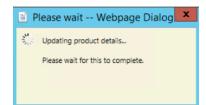








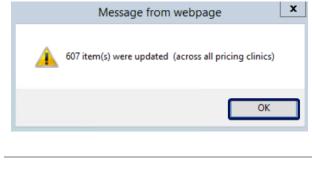
Online Inventory Update This downloads the latest available pricing information for the selected supplier, and then applies these updates to your fees. Supplier [Covetrus] Last Downloaded 03 May 2020 11:25 X Apply To All Pricing Clinics Reimport Last Download Latest & Import



- 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.

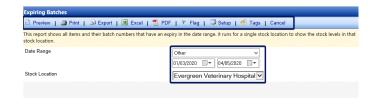


- Once the price list has been downloaded, you will see this window which shows you how many items have been updated.
- Click on **OK** when you are ready to move on.
- A list of all the products that have been adjusted will display for you to have a look at.
- If you wish to change the cost price, you 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.
- 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.



Code	Name	Date	Original £	New £	Change	^
321	Acp 10mg Tab	04/05/2020	£0.28	0.32	£0.04 (15:6%)	
329	Acp 2mg Inj	04/05/2020	£4.72	5.56	£0.84 (17.7%)	
148	Activated Charcoal 1 ltr	04/05/2020	£0.01	0.01	£0.00 (-24.2%)	
016	aDAPtil Dog Spray 60 mi	04/05/2020	£17.99	19.46	£1.47 (8.296)	
030	Adaptil Express Tablets (10)	04/05/2020	£6.88	7.23	£0.35 (5.1%)	
1855	Adaptil Tablets (40)	04/05/2020	£25,23	27.30	£2.07 (8.2%)	
545	Adrenacalne 100ml	04/05/2020	£0.04	0.06	£0.02 (65.3%)	
1581	Advocate <4kg Small Cat 3 Pipette	04/05/2020	£14.67	16.02	£1.35 (9.2%)	
725	Advocate 4-10kg Med Dog 6 Pipette	04/05/2020	£30.06	32.51	£2.45 (8.2%)	
384	Advocate 4-8kg Large Cat 3 Pipette	04/05/2020	£14.29	16.38	£2.09 (14.6%)	
845	Agrimin Smartrace Plus 24-7 (10)	04/05/2020	£4,41	4.69	£0.29 (6.5%)	
1506	Aktivalt / Med/Jame Don 1 (60)	04/05/2020	£0.42	0 45	F0.03 (8.0%)	Ĩ

Ê	Synchronisation
Orders	Update Supplier Product Catalogue Update prices, barcodes and descriptions for inventory items from your supplier.
<u> </u>	Tools
Goods Receipts	Recalculate Stock On Hand Levels Checks and updates on hand levels for all stock controlled items based on your purchases and sales history.
🚞 Back Orders,	Recalculate Critical or Ideal Levels Update the critical or ideal levels of all stock controlled items based on purchases or sales.
Transfers & Adjustments	 Update Stock Order Codes Allows bulk updates to be made to your stock order codes to facilitate online ordering.
🖄 Reporting &	Review Expiring Batches Generate report of expiring batches.
Management	Management
	 Configure Suppliers Manage settings and other details for your product suppliers.
	 Configure Stock Locations Allows management of stock locations.





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

2	Inventory Management
É .	Back Orders
Orders	 Manage Back Orders (270) View and delete items that are currently on order from your suppliers.
Goods	Print Back Orders Produce a report of items that are currently on order from your suppliers.
Receipts	 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.
Back Orders, Transfers &	- inventory multipleto
Adjustments	Print Transfer Summary
Reporting & Management	Adjustments & Stock Takes
management	
	 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.

STOCK ADJUSTMENTS					
Evergreen Veterinan	<u>y Ho</u> spital				
Date 04/05/2020	Item Name and Batch	Units on Hand	Actual	Adjustment	~
llem Name	Advocate Aqua Medium Dog x 6	-6	1		•
	Advocate Orange Cat/Kitten x 3	-4			•
Service	Advocate Purple Large Cat x 3	-5			
Fiee, Worm & Tick Preparations Active in Last X Months	Advocate Purple Large Cat x 6	0			•
Active in Last X Months	Advocate Red Large Dog x 6	-3			•
Category	Dimmitrol Tabs 50Mg (100)	-2	1		-
	Prontal Cat 250mg Tablets	-13			•
Include Deactivated	Drontal Dog 10Kg Tabs	-39.75			
Search	Drontal Dog 35Kg Tabs	-8			•
	Drontal Plus 200mg Tablets	-30			-
	Endogard Tabs 20Kg (100)	0			-
Below Ideal level Below Critical level	Elea Worm & Tick Elea	0			×

	Inventory Management
1	Back Orders
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Back Orders, Transfers &	 Inventory Transfers Move inventory between different stock locations.
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	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.
- 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.
- 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.



the	is a list of existing stock take sheets for your current stock locat sheet.			-	
	importing, all items with an on hand value in the sheet will be u are assumed as stock location 1.	pdated. Any blank d	ates are assu	umed to be for tod	ay, and any blank stock locatio
aiues	Template	Edit	Import	Size	Modified De
38	Evergreen Veterinary Hospital shaz		0	384.29K	02/07/2019 11:20:36
38	Evergreen Veterinary Hospital		0	384.29K	02/07/2019 11:20:40
36	Evergreen Veterinary Hospital[1]		0	384.42K	06/04/2020 18:25:28
38	Flea and Wormers Stock Take 04052020		0	1.90K	04/05/2020 10:40:54
36	test 290819		0	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 X 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.

STOCK ADJUSTMENTS	Inventory Manag	,			_
Evergreen Veterina	ry Hospital				
Date 04/05/2020 ij	Item Name and Batch	Units on Hand	Actual	Adjustment	
Item Name	Advocate Aqua Medium Dog x 6	-6	25 🦸	31	•
	Advocate Orange Cat/Kitten x 3	-4	18 🦸	22	
Service	Advocate Purple Large Cat x 3	-5	16 📌	21	•
Flea, Worm & Tick Preparations	Advocate Purple Large Cat x 6	0	0 🦸	0	
ACUVE III CASLA MOTIOIS	Advocate Red Large Dog x 6	-3	12 🦸	15	
Category	Dimmitrol Tabs 50Mg (100)	-2	203 🦸	205	*
	 Drontal Cat 250mg Tablets 	-13			•
Include Deactivated	Drontal Dog 10Kg Tabs	-39.75			*
Search	Drontal Dog 35Kg Tabs	-8			•
	Drontal Plus 200mg Tablets	-30			
	Endogard Tabs 20Kg (100)	0			
Below Ideal level Below Critical level	Flas Worm & Tick Flas	0			

- 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.
- × **v** ing: This wizard will only update the default Fixed and sis > Products and Services - Multi Component Items

Data Wizards

Clinic Charge Filter Wizard

ltem Labels & Notes Wizard

globally visition Item Pricing Wizard

Update item prices, specifi fee and markup group. Th

data.

onfigure which charges are filtered or

Create or update existing items using simple information. A reminders to be set on an item. Affects globally visible data

tes and labels Aff Item Miscellaneous Wizard

Item Basic Information Wizard

Export Data To New Wizard Files

⊖ Clinic Overrides

⊖ Discount Scheme

Performance Pack

⊖ Products & Services

ItemPricing_General

Flea, Worm & Tick Preparations

⊖ Configuration

⊖ Financial

Item Pricing Wizard - create	d on 05/05/2020 by Syst	em Controller (ID: 9)
ItemService:Flea, Worm & Tick Preparations [Incl	ludeDeactivated:False PriceClinic:1 StockL	ocationID:1 Central Update:1 WizardType:Iteml

Item Code	Item Name	Standard Fee For Units	Standard Fee For Packs
606993	Advocate Aqua Medium Dog x 6	Dispensing SA- Label999777	Dispensing SA- Label999777
606997	Advocate Orange Cat/Kitten x 3	Dispensing SA- Label999777	Dispensing SA- Label999777
606999	Advocate Purple Large Cat x 3	Dispensing SA- Label999777	Dispensing SA- Label999777
607000	Advocate Purple Large Cat x 6	Dispensing SA- Label999777	Dispensing SA- Label999777
607002	Advocate Red Large Dog x 6	Dispensing SA- Label999777	Dispensing SA- Label999777
607140	Dimmitrol Tabs 50Mg (100)	Dispensing SA- Label999777	Dispensing SA- Label999777
1262	Drontal Cat 250mg Tablets	(none)	(none)
607151	Drontal Dog 10Kg Tabs	Dispensing SA- Label999777	Dispensing SA- Label999777
607152	Drontal Dog 35Kg Tabs	Dispensing SA- Label999777	Dispensing SA- Label999777
1238	Drontal Plus 200mg Tablets	(none)	(none)
607160	Endogard Tabs 20Kg (100)	Dispensing SA- Label999777	Dispensing SA- Label999777
904001	Flea,Worm & Tick - Flea	Dispensing SA- Label999777	Dispensing SA- Full Pack 999776
904002	Flea,Worm & Tick - Flea & Heartworm	Dispensing SA- Label999777	Dispensing SA- Full Pack999776

- 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. •





lter 1	Type (All Types)	~	Clinic Evergreen	Folder: D:\!!Client		
	Wizard Type	Created Date	Modified Date	User	Clinic	
	Item Pricing Wizard	05 May 2020 09:19:47	05 May 2020 09:19:47 Wizard - RoType(ItemPricing, General) Ro	System Controller	Evergreen	(1
	Item Stock Wizard	06 April 2020 18:23:25	06 April 2020 18:23:25	System Controller	Evergreen	U
			Vizard - RxType(ItemStock) RxUser(9) RxI	-,	Everyfeen	(
	Item Pricing Wizard	06 April 2020 18:22:09	06 April 2020 18:22:09	System Controller	Evergreen	-
) (D:WClient FoldersVLearningC	ollateral/Excel/DataWizards/Item Pricing	Wizard - RxType(ItemPricing_General) Ro	User(9) RxClinic(1)-9-202046-182	23.xlsx	đ
	Item Miscellaneous Wizard	06 April 2020 18:21:28	06 April 2020 18:21:28	System Controller	Evergreen	~
) (D:WIClient FoldersVLearningCo	ollatera//Excel/DataWizards/Item Miscella	aneous Wizard - RxType(ItemMiscellaneou	s) RxUser(9) RxClinic(1)-9-20204	6-182123.xlsx	(
	Item Basic Information Wiza	rd 06 April 2020 18:19:58	06 April 2020 18:19:58	System Controller	Evergreen	G
りし	D:WClient Folders\LearningCo	ollateral/Excel/DataWizards\Item Basic In	nformation Wizard - RxType(ItemBasic) Rx	User(9) RxClinic(1)-9-202046-181	936.xlsx	(đ
	Item Stock Wizard	06 April 2020 18:14:08	06 April 2020 18:14:08	System Controller	Evergreen	G
り (D:VIClient Folders/LearningC	ollateral/Excel/DataWizards\Item Stock V	Vizard - RxType(ItemStock) RxUser(9) RxI	Clinic(1)-9-202046-181357.xlsx		Ē
	Item Labels & Notes Wizard	29 October 2019 09:07:11	29 October 2019 09:07:11	System Controller	Evergreen	0
i) (E	D:WClient Folders\LearningCi	ollateral/Excel/DataWizards\Item Labels	& Notes Wizard - RxType(ItemNotes) RxU	ser(9) RxClinic(1)-9-20191029-97-	4.xlsx	đ



🔆 Please Wait

The data is being imported. This may take some time to complete

- 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.

Import Completed



Only rows that have been changed will be imported Total Rows Processed: 42 Total Rows Imported: 0 Total Rows Failed: 0



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 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.