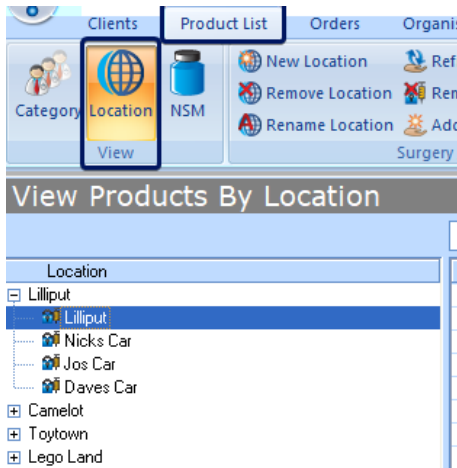


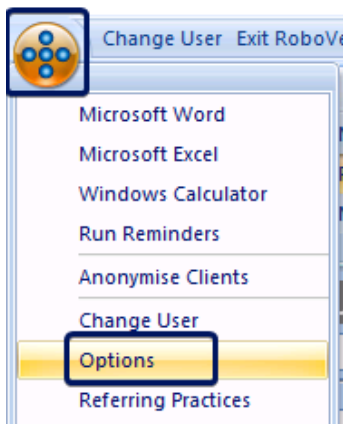
Checking and Adjusting Holdings and Batches

RoboVet

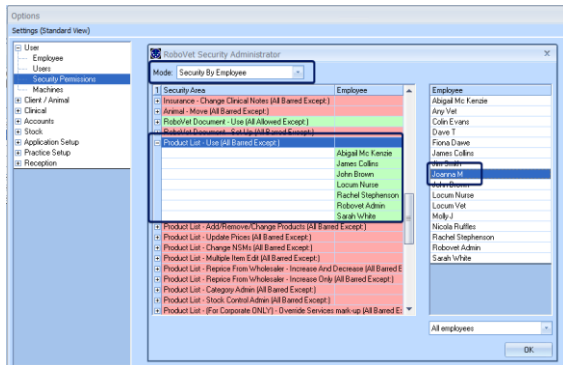
The bottom of the page features a decorative graphic consisting of three overlapping geometric shapes: a red triangle on the left, a dark blue triangle at the bottom center, and a teal triangle on the right.



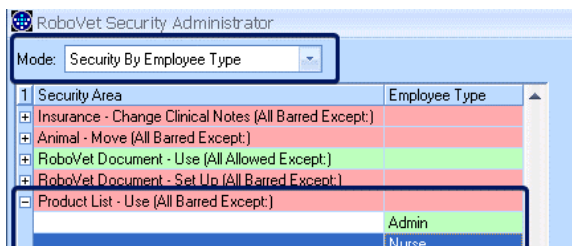
- To check stock holdings, go to the **Product List Tab** and then the location view.



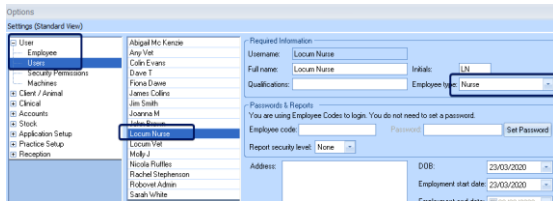
- This is a permission-based area. To add a user to this permission, click on the **RoboVet button**, then **Options**.



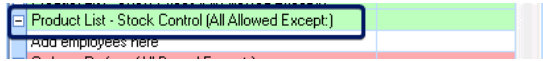
- Then in the User section click on **Security Permissions**, then scroll down the list to find **Product List – Use**.
- Add the user to this area by dragging across from the **RHS** box.



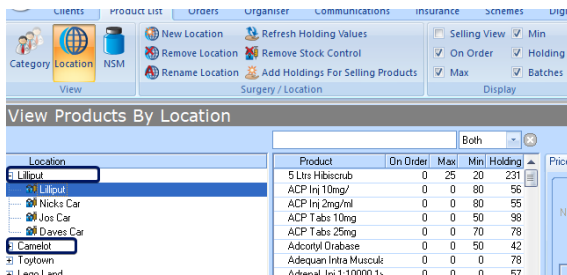
- If you use the **Mode: security by employee type**, then just make sure the employee type is in the list e.g. nurse.



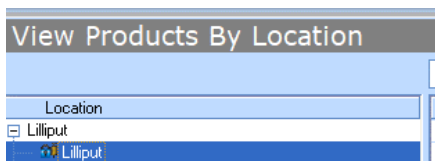
- Make sure you have assigned a relevant employee type to the user(s), in the user's section.
- Get the user to re-logout to pick up new permission changes.



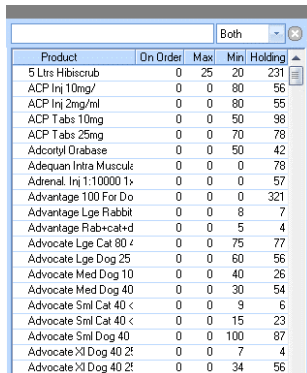
- By default, all users can do some stock control actions, you may need to check the user is not excluded.



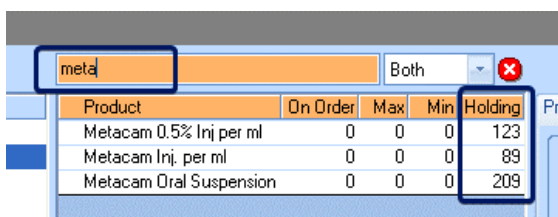
- Once in location view you will see each branch surgery, and beneath it any physical stock locations for that branch surgery.
- You may just have one physical location per branch surgery, or several, such as vet car stock.



- Highlight the stock location you wish to look at.



- The middle section will display all stock items that can be sold from this location.



- You can search for specific stock items using the search box at the top.
- Holdings are shown to the right. If any items are on order these will also be displayed. You can also set min and max holding levels (we cover this in a further guide).

Product	On Order	Max	Min	Holding
Metacam 0.5% Inj per ml	0	0	0	123
Metacam Inj. per ml	0	0	0	89
Metacam Oral Suspension	0	0	0	209

- To manually adjust a holding highlight the stock item and double click on the holding field.

Stock Take

Enter the date/time for this stock take value.
This cannot be in the future.

Stock take date: 23/03/2020 11:36:31

Reason:

OK Cancel

- You can now edit the holding, click away from the field to save and you will then see this stock take pop up box.
- You can add a reason, but it is not mandatory.

Product	On Order	Max	Min	Holding
Metacam 0.5% Inj per ml	0	0	0	20
Metacam Inj. per ml	0	0	0	89
Metacam Oral Suspension	0	0	0	209

- Click **OK** and the holding will now be updated.

Product	On Order	Max	Min	Holding
Nobivac L 2 1 dose	0	0	0	50
SD65487i, 04/10/2i				

- For batch tracked items you need to edit the actual batch entry.

Refresh Holding Values

Improve Stock Control

Holdings For Selling Products

Location

Selling View

On Order

Max

Min

Holding

Batches

Display

Add Holding

New Batch

Remove Batch

Change Batch

Add Wastage

Wastage

Actions

Product	On Order	Max	Min	Holding
Nobivac L 2 1 dose	0	0	0	50
SD65487i, 04/10/2i				

Price/POS/Supplier/NSM/Cats

Details/Species/

Stock

Service

- You can change or add new batches for a stock item by highlighting the stock item and then clicking on the relevant button in the action's toolbar.

Adding

New Batch

Add Wastage

Remove Batch

Wastage

Actions

New batch for Nobivac L 2 1 dose

Batch ID:

Expiry: 23/03/2020

Wholesaler ID 1:

Wholesaler ID 2:

OK Cancel

- Click on **New Batch** and the new batch pop up window will appear.

New batch for Nobivac L 2 1 dose

Batch ID:

Expiry:

- Enter the **batch** and **expiry**. You don't need to complete the Wholesaler ID fields.

Product	On Order	Max	Min	Holding
Nobivac L 2 1 dose	0	0	0	50
SD65487i, 04/10/20				50
AB172123, 23/10/2				0

- Then add in the **quantity** of the batch.

Product	On Order	Max	Min	Holding
Nobivac L 2 1 dose	0	0	0	100
AB172123, 23/10/2				50
SD65487i, 04/10/20				50

- Click **OK** to the stock take pop up (entering a reason if required).
- Then your new batch will be displayed.