



eCommerce Fee Cleanup

A Guide To Checking And Configuring Fees Ready For eCommerce

1. Stock Control Tab

Check that all your stock items have the stock control tab turned on > You can do this through an unfiltered 'Item Basic Information Wizard'.

Note: Do not set use stock control in data wizard. You will need to go to the item to set this.

The data wizard is just used to pinpoint any fees that need to be adjusted. You will need to turn the stock control on by going to each stock fee and you will need to choose a 'Preferred Wholesaler'.

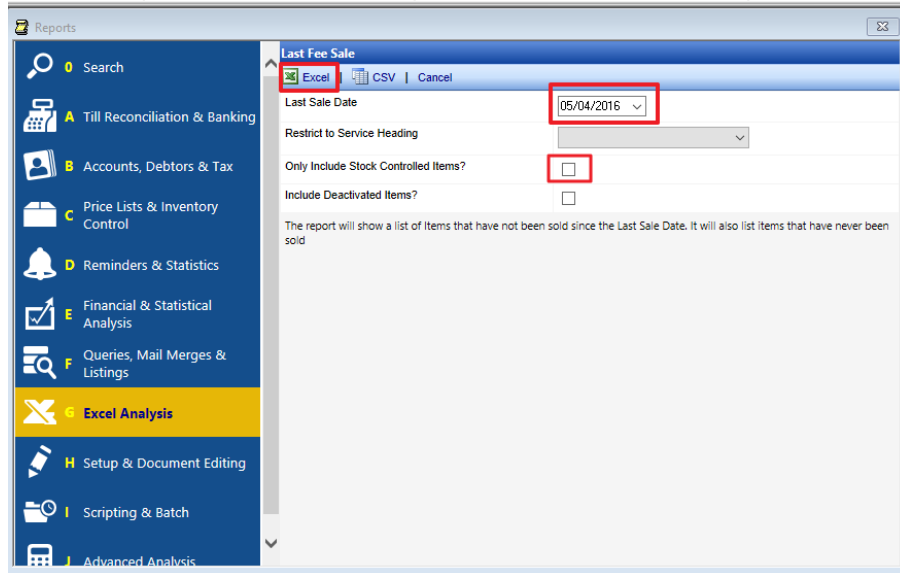
Item Code	Item Name	Printed Name	Service Name	Species	Species Category	Use On	Use Stock Control?
650119	SNAP Cortisol		Laboratory - In Clinic		(none)	No	Yes
650131	SNAP Giardia		Laboratory - In Clinic		(none)	No	Yes
650114	UA Strips		Laboratory - In Clinic		(none)	No	Yes
999926	!All Admin/Injection/Dispensing All Species	Medication Administration	z_Internal Use		(none)	Yes	No
999799	!All Admin/Injection/Dispensing SA- Option	Medication Administration	z_Internal Use		(none)	Yes	No
999931	!Basic Injection/Dispensing All Species	Medication Administration	z_Internal Use		(none)	Yes	No
999928	!Basic Injection/Dispensing SA-Option	Medication Administration	z_Internal Use		(none)	Yes	No
621915	!Miscellaneous Consumables	Consumables	Consumables		(none)	Yes	Yes
621916	!Miscellaneous Medication	Medication	Pharmacy		(none)	No	Yes
621917	!Miscellaneous Merchandise	Merchandise	Pharmacy		(none)	No	Yes

2. Deactivate Fees No Longer Used

Go to Reports > G Excel Analysis > Products & Services > Last Fee Sale.

Set your date e.g. Last Sale was 24 months ago.

- Non-Performance Pack clinics - Untick stock-controlled items
- Performance Pack Clinics - Keep the Stock Controlled items restriction ticked
- Export to Excel



This gives you a list of items to go through and assess. You will need to go to each item to deactivate or create an 'Item Basic Information' Wizard to deactivate in bulk.

3. Track On Hand Levels

Ensure any items that you are wanting to stock take etc has the track on hand level tickbox ticked. You can check and adjust this through the “Item Stock Data Wizard”.

Item Stock Wizard - Created on 20/02/2018 by System Controller (ID: 9)

Item Code	Item Name	Species	Supplier	Ideal Level	Critical Level	Seasonal Start	Seasonal End	Seasonal Ide: Always Order?	Track OH Levels?	Track Batch Of
654492	Aminocaproic Acid Caps 500mg (100)	<All Species>	BOVA Chemist --680	0	0	0	0	0 No	Yes	No
671071	Apex Clindamycin 150mg (100)	<All Species>	Default Supplier --101	0	0			No	Yes	No
646876	Apo Omeprazole 20mg Tablets (30)	<All Species>	Default Supplier --101	0	0			No	Yes	No
654323	Apoquel Tablets 16mg (100)	<All Species>	Default Supplier --101	0	0			No	Yes	No
671994	Apoquel Tablets 3.6mg (100)	<All Species>	Default Supplier --101	0	0			No	Yes	No
671996	Apoquel Tablets 5.4mg (100)	<All Species>	Default Supplier --101	0	0			No	Yes	No
605555	Asmol Inhaler Complete	<All Species>	Provet --601	0	0	0	0	No	Yes	No

4. Stock Codes

Export List of Products Codes and Send to supplier to be coded. Once you received the updated stock codes from your supplier, forward it to RxWorks support or your eCommerce Implementer.

To export the codes, Go to Inventory > Reporting and Management > Update Stock Order Codes > Export Products > You will need to create a separate one for each supplier > Send to your email address and forward onto supplier or email to supplier directly.

Inventory Management

Export Brand Data
This exports the brand details for the specified supplier into a data file. This data can be updated by your supplier to include missing stock order codes and barcodes, and then reimported via the **Import Product Codes** function.

Supplier: **Provet** Select the supplier you are entering information for.

Include another supplier's codes to map from

Restrictions

Service: Promotions

Category: Income Group Categories (name)

(value)

Received in the last 12 Months

Sold in the last 12 Months

Has a stock code for this supplier

Output

Output file: C:\RxWorks\Stock\Outgoing\Brands.csv

Send file as an email attachment after product file is created:

Email: **supplier@supplier.com**

Subject: Stock Code Information for RxWorks Veterinary Clinic

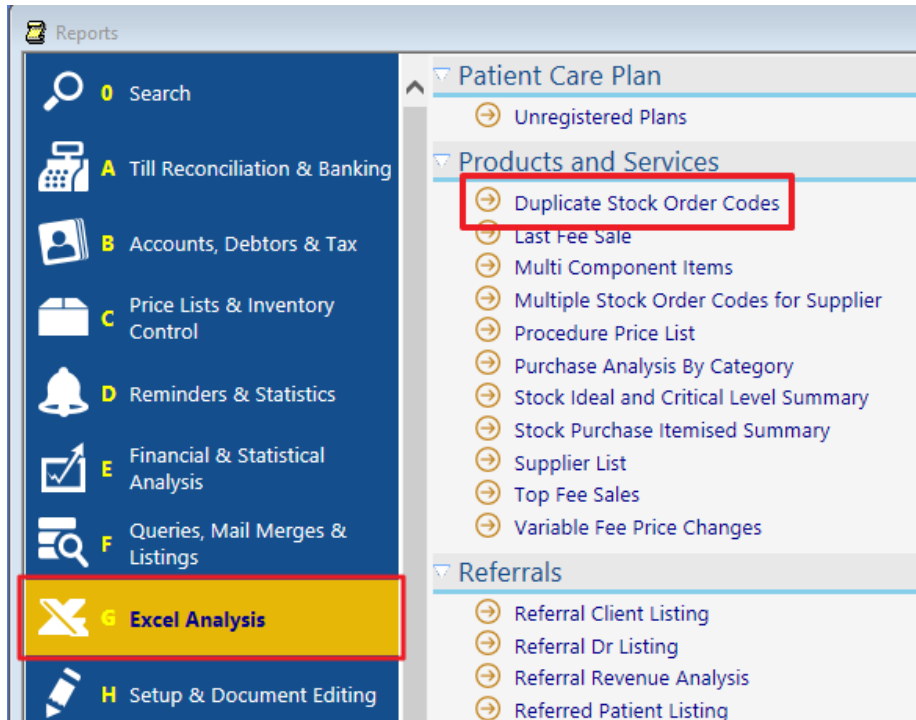
Message: The attached file contains the stock code information for RxWorks Veterinary Clinic. Please use this CSV file to

Export Cancel

5. Check For Duplicate Stock Codes

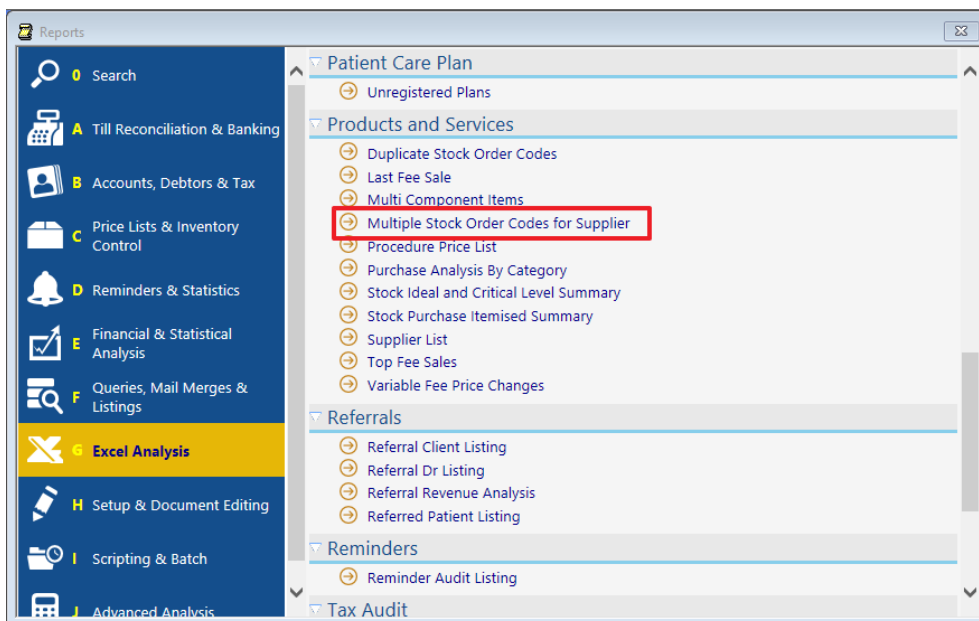
Once RxWorks support or your Implementer has imported the wholesalers stock codes, go to Reports > G. Excel Analysis > Products & Services > Duplicate Stock Order Codes.

If there are duplicates, you will need to remove the stock code from the incorrect fee by navigating into each fee on the Stock Control Tab.



6. Ensure Products Don't Have More Than 1 Brand For A Wholesaler

Go to Reports > G Excel Analysis > Products & Services - Multiple Stock Order Codes for Supplier.



7. Set Preferred Wholesaler

Although you can order a product from multiple suppliers, you still need to setup a preferred wholesaler for your automatic ordering. You can set this through the Item Stock wizard as well.

Item Stock Wizard - Created on 20/02/2018 by System Controller (ID: 9)

Item Code	Item Name	Species	Supplier	Ideal Level	Critical Level	Seasonal Start	Seasonal End	Seasonal Ide	Always Order?	Track OH Levels?	Track Batch OH
654492	Aminocaproic Acid Caps 500mg (100)	<All Species>	BOVA Chemist --680	0	0	0	0	0	No	Yes	No
671071	Apex Clindamycin 150mg (100)	<All Species>	Default Supplier --101	0	0				No	Yes	No
646876	Apo Omeprazole 20mg Tablets (30)	<All Species>	Default Supplier --101	0	0				No	Yes	No
654323	Apoquel Tablets 16mg (100)	<All Species>	Default Supplier --101	0	0				No	Yes	No
671994	Apoquel Tablets 3.6mg (100)	<All Species>	Default Supplier --101	0	0				No	Yes	No
671996	Apoquel Tablets 5.4mg (100)	<All Species>	Default Supplier --101	0	0				No	Yes	No
605555	Asmol Inhaler Complete	<All Species>	Provet --601	0	0	0	0		No	Yes	No

8. Pack Sizes

Check that your pack sizes are correct > you can do this through the Physical Inventory Count Report (Reports > C Price Lists & Inventory Count > Physical Inventory Count).

Stock Take At 27/09/2019
RxWorks Veterinary Clinic

No	Name	Component Name	Pack Size	On Hand
904001	Flea,Worm & Tick - Flea	No of Units	1	0.000
904002	Flea,Worm & Tick - Flea & Heartworm	No of Units	1	0.000
904003	Flea,Worm & Tick - Flea & Tick	No of Units	1	0.000
904072	Flea,Worm & Tick - Flea ,Heartworm, Round,Hook & Whip Worm	No of Units	1	0.000
904073	Flea,Worm & Tick - Heartworm	No of Units	1	0.000
904074	Flea,Worm & Tick - Heartworm, Round,Hook & Whip Worm	No of Units	1	0.000
904075	Flea,Worm & Tick - Round,Hook & Whip Worm	No of Units	1	0.000
904077	Flea,Worm & Tick - Tape Worm	No of Units	1	0.000
904078	Flea,Worm & Tick - Tape, Round,Hook & Whip Worm	No of Units	1	0.000
904031	Foods - Lifestage - <All Species>	No of units	1	0.000
904037	Foods - Lifestage - Cat	No of units	1	0.000
904034	Foods - Lifestage - Dog	No of units	1	0.000
904040	Foods - Lifestage - Equine	No of units	1	0.000

To change pack sizes, Navigate into the fees screen > Find the fee > Click on the Stock Control Tab > Click on the "... " button next to the Brand > Update Pack size.

Note: Remember to check the cost price as this will change due to the pack size.

9. Set Critical And Ideal Levels

This can be done through calculation or manually through a data wizard. If you use the calculation method, you may need to clean up values in the data wizard after because it brings through a lot of decimal valued amounts.

Calculate Levels: Inventory > Reporting & Management > Recalculate Critical or Ideal Levels

Setting through Data Wizard (Make sure you are logged into the correct clinic/ stock location) and create an Item Stock Wizard. Once finished - save and import

Item Stock Wizard - Created on 19/02/2018 by System Controller (ID: 9)

ItemService:Medications | IncludeDeactivated:False | PriceClinic:1 | StockLocationID:1 | CentralUpdate:1 | WizardType:ItemStock | RxSessionUserID:9 | RxSessionID:118 | SessionID:118 | D:1

Item Code	Item Name	Species	Supplier	Ideal Level	Critical Level	Seasonal Start Month
654492	Aminocaproic Acid Caps 500mg (100)	<All Species>	BOVA Chemist --680	0	0	0
671071	Apex Clindamycin 150mg (100)	<All Species>	Default Supplier --101	0	0	
646876	Apo Omeprazole 20mg Tablets (30)	<All Species>	Default Supplier --101	0	0	
654323	Apoquel Tablets 16mg (100)	<All Species>	Default Supplier --101	0	0	
671994	Apoquel Tablets 3.6mg (100)	<All Species>	Default Supplier --101	0	0	
671996	Apoquel Tablets 5.4mg (100)	<All Species>	Default Supplier --101	0	0	
605555	Asmol Inhaler Complete	<All Species>	Provet --601	0	0	0
641449	Atipamezole Ilium (10)	<All Species>	Default Supplier --101	0	0	0
603277	Augmentin Duo Suspension 400 60mL	<All Species>	Provet --601	0	0	0

10. Check Items Are Using A Markup/ Markup Group

Stock Items need to have both the cost price and the Markup setup correctly to allow for prices to increase accordingly through Product Price Updates.

We recommend using Markup Groups, this allows you to set a percentage for a group of fee items which allows you to change the percentage as required and thus in turn change the percentage on all the fee items with that group set rather than having to go to each individual item.

Alifaxan CD RTU Cat & Dog 20ml At RxWorks Performance Pack Clinic

1. Fee Details 2. Attachments 3. Categories and Insurance 4. Stock Control

Item Number: 11293 Template:

Item Name: Alfaxan CD RTU Cat & Dog 20ml

Printed Name:

Services: Medications

Short Name:

Species: <All Species> Edit

Category: Canine

Minimum: Drug Item

Markup Group: Medications (150%) Edit

Deactivated Date:

Fixed Component

Standard Fee Unit: Dispensing SA- Part Pack

Standard Fee Pack: Dispensing SA- Full Pack

Income Group: Fees Professional Inj/Disp

Default Value: 1 Default Value Override:

Cost Price: 0.00

Tax Rate: 10.000 %

Description	Markup	Ex Tax	Inc Tax
Dispensing SA - Part Pack	0.00	4.5456	5.0001

Use As Standard Fee Add Edit Delete

Variable Component

Description Unit: ml Pack:

Charge Method: As Units As Packs

Income Group: Inventory Medications

Default: 1 Apply Patient Weight:

Cost Price: 4.2245 Pack Price: 84.49

Special Price: 4.2245

Special Price: 84.49

Tax Rate: 10.000 %

Quantity	Markup	Ex Tax	Inc Tax	Pack Inc
All Qua...	150.00	10.5613	11.6174	232.348

Stepped Sliding Add Edit Delete

Use Fixed Price For Quantities

Stock Control Use only in procedures & bundles Price Effective From 11/10/2016

Otherwise you can set individual markups on items if you do not wish to use a mark-up group.

Alifaxan CD RTU Cat & Dog 20ml At RxWorks Performance Pack Clinic

Edit Fee Price

VARIABLE COMPONENT

Alifaxan CD RTU Cat & Dog 20ml

RxWorks Performance Pack Clinic

Markup Group: Shoppable: Set Own Markup

Charge Method: As Units

Pricing Date: 20 June, 2017

Cost Price: 4.22

Special Price: 4.22

Tax: 10.00 %

Quantity	Markup	Sale Price	Maximum Discount	Min. Service Ratio
999999	110.00	9.7586	0.00	1.00

Fixed Price Will not be discounted

Back Add Save

Tax rate: 10.000 %

Description	Markup	Ex Tax	Inc Tax
Dispensing SA - Part Pack	0.00	4.5456	5.0001

Use As Standard Fee Add Edit Delete

Quantity	Markup	Ex Tax	Inc Tax	Pack Inc
All Qua...	0.00	10.5613	11.6174	232.348

Stepped Sliding Add Edit Delete

Use Fixed Price For Quantities

Stock Control Use only in procedures & bundles Price Effective From 11/10/2016

You can also check and setup the mark ups in the Item Pricing Wizard in bulk.

Item Pricing Wizard - Created on 20/02/2018 by System Controller (ID: 9)

Item Code	Item Name	Standard Fee For Units	Standard Fee For Packs	Item Minimum	Markup Group Description
654492	Aminocaproic Acid Caps 500mg (100)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
671071	Apex Clindamycin 150mg (100)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
646876	Apo Omeprazole 20mg Tablets (30)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
654323	Apoquel Tablets 16mg (100)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
671994	Apoquel Tablets 3.6mg (100)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
671996	Apoquel Tablets 5.4mg (100)	Dispensing SA- Part Pack --999775	Dispensing SA- Full Pack --999776	DISP: Medication Part	Medications --999064
605555	Asmol Inhaler Complete	Dispensing SA- Full Pack --999776	Dispensing SA- Full Pack --999776	DISP: Medication Full	Medications --999064
641449	Atipamezole Ilium (10)	Injection SA- Intramuscular --999782	Dispensing SA- Full Pack --999776	INU: Medication IM	Medications Injections --999085
603277	Augmentin Duo Suspension 400 60mL	Dispensing SA- Full Pack --999776	Dispensing SA- Full Pack --999776	DISP: Medication Full	Medications --999064
631395	Baycox Piglet 1L	Dispensing LA- Full Pack --999821	Dispensing LA- Full Pack --999821	DISP: Medication Full	Medications --999064
646698	Baycox Piglet 5% Sol (250)	!Basic Injection/Dispensing SA-Option --999928	Dispensing SA- Full Pack --999776	DISP: Medication	Medications --999064
603290	Betamox Drops 75mg 15mL Bottle	Dispensing SA- Full Pack --999776	Dispensing SA- Full Pack --999776	DISP: Medication Full	Medications --999064

11. Perform Stocktake

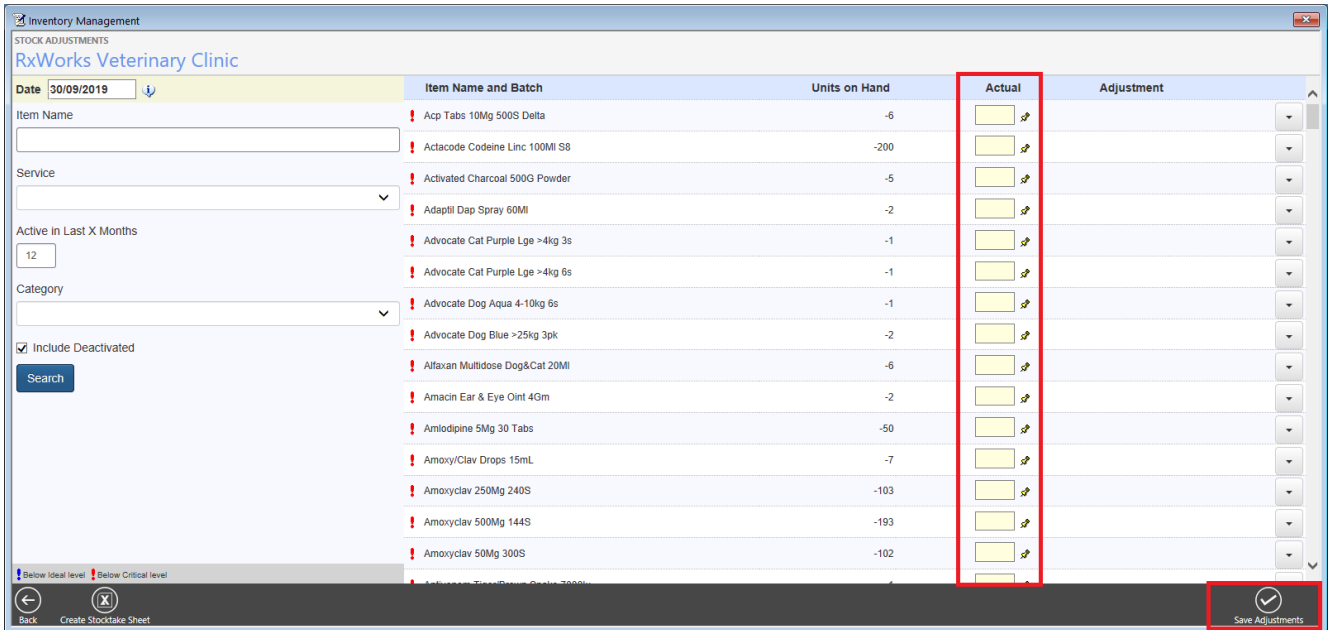
We recommend performing a stocktake once eCommerce is working and goods receipts are imported (as this will affect your On hand levels).

To do a stocktake, you can create a stock take sheet through Inventory > Back Orders, Transfers & Adjustments > Enter New Adjustments > Set your filter options e.g. Active in last 12 months > Click Search and then click 'Create Stocktake Sheet' > Name and Date the sheet.

By creating the sheet, you can print it off and walk around the clinic to fill out. Or you can open the spreadsheet on a mobile terminal to fill the sheet out as you go.

To edit and reprint this sheet you can go to 'Import/Manage Adjustments From File or PDT'

If you have printed the stocktake sheet To enter the adjustments, we recommend that you do this manually through the 'Enter New Adjustments Screen'



If you have entered the adjustments in the spreadsheet ensure that you have filled out the date column if it is different from the date that you are importing and then click on the 'import' button in the 'Import/Manage Adjustments From File or PDT ' in the Backorders, Transfers and Adjustments section.

NOTE: The date that you put on your spreadsheet needs to be the Date that you counted the stock.

No movement of stock is allowed during the time of count and either the import date/time or the end of the day of the date you enter (if you are importing the sheet at a later date). We recommend that you do your large stocktakes after hours to avoid stock movement