PharmaSol

Pharmascan 2 User Manual

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Contents

1 Introduction

This document details how you use ‘Pharmascan 2’.
All four ‘Pharmascan 2’ modules are clearly outlined in this document, they include:

- **Stock Cards** – How to views and edit your LOTS Stock Cards via Pharmascan.
- **Stocktake** – How to perform a stocktake using your Pharmascan unit.
- **Orders** – How to create and modify an order using your Pharmascan unit.
- **Receipting Invoice** – How to receipt off outstanding unit via Pharmascan.

All actions performed on the Pharmascan will be recorded back to LOTS.

2 Starting PharmaScan

1. To start PharmaScan just select 'PharmaScan' of the main menu of the mobile unit.

2. You will be prompted to enter a Staff ID (see Figure 2.1) and then select OK (or press <Enter>).

✍**Note:** Tap the letter on the keyboard to enter in your User ID. The keyboard can be shown/hidden by tapping on the blue keyboard icon in the bottom right-hand corner.

Figure 2.1

3. After a valid Staff ID is entered the PharmaScan main menu should appear and the application is ready for use (see Figure 2.2)

Figure 2.2

3 Stock Cards

The Stock Cards module of PharmaScan provides the ability to modify certain fields of existing Stock Cards. There is no facility to create new Stock Cards.

1. To display a Stock Card enter one of the following in the 'Search for Product' field (see Figure 3.1):
   - Scan in an item's barcode.
   - Enter in a item's PLU
   - Enter in at least one character of the items description.

2. To start the search, click the Stock Card icon or press Enter.

✍**Note:** Scanning an item's barcode while in the main menu will also open that items Stock Card.

3. Select the 'Active Stock' checkbox to restrict the search to only include active stock.

4. A product list will be displayed, highlight the product you wish to view and press 'Select'.

5. This will display the 'Stock Card' screen (see Figure 3.2).

6. The first tab show is the 'Main' and it has the following fields:
   - **PLU** – This is the Price Look Up number and cannot be edited.
   - **Real Cost** – This is real cost of the item and cannot be edited.
   - **Average Cost** – This is the average cost of the item and cannot be edited.
   - **List Cost** – This is the list cost of the item and this amount can be edited.
   - **Retail** – This is the retail cost of the item and this amount can be edited.
   - **Markup** – This is the markup expressed as a percentage. This figure can be edited.
   - **Bar Graph** – The bottom of the screen shows the sales for the item month-by-month for the past 12 months.
   - **Barcode** – This shows of list of items barcodes. To remove a barcode highlight it and select the Red Cross.

Figure 3.1

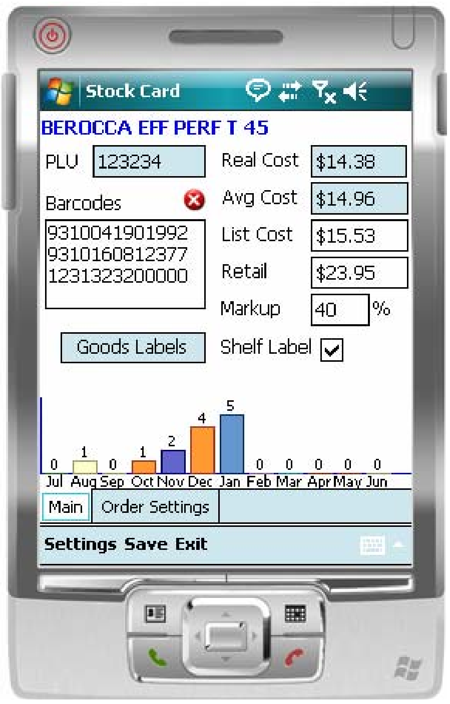

Figure 3.2

✍**Note:** The following will be automatically recalculated:

- If List Cost is changed then Retail will be recalculated
- If Retail is changed then Markup will be recalculated.
- If Markup is changed then Retail will be recalculated.

7. There is also a 'Goods Labels' button. If you select this the screen will remove the graph and display the following fields (see Figure 3.3):

8. To print goods labels enter the amount in the quantity field and tap 'Goods Labels'. If you decide you do not want to print goods labels tap the Red Cross to the right of the quantity field.
Labels will be printed to the same printer that is setup in LOTS for printing product labels.

9. To add shelf labels to the shelf label queue, tick the 'Shelf Label' tick box and enter the amount of shelf labels in the quantity field.
If shelf labels are already added to the item then the 'Shelf Label; tick box will be automatically ticked when you tap the 'Goods Labels' button.

10. The second tab is the 'Order Settings' tab (see Figure 3.4), this tab simply allows you to view your ordering options that are set in LOTS Stock Cards.
The only field you can edit is the SOH (Stock On Hand). If you adjust the SOH value of the item, when you save the stock card you will be prompted to enter in a reason for the stock adjustment.

11. When you have finished with the stock card and want to save any changes made, select 'Save'. If you don't want to save any changes simply select 'Exit'.This will return you to the main screen (Figure 2.2).

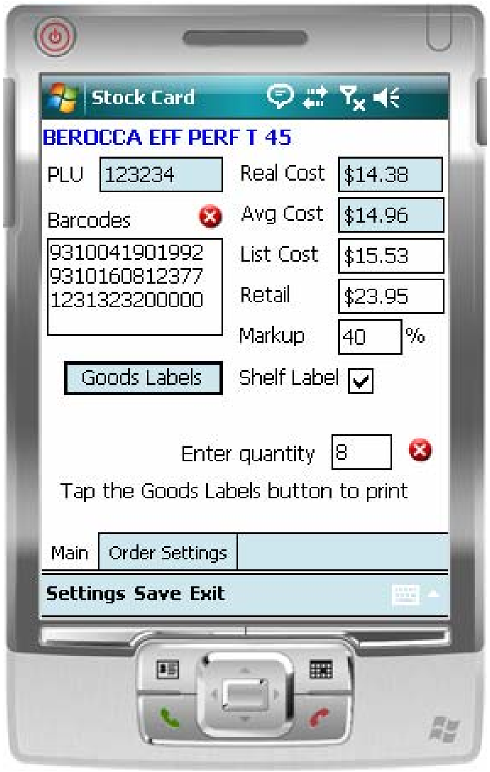

Figure 3.3

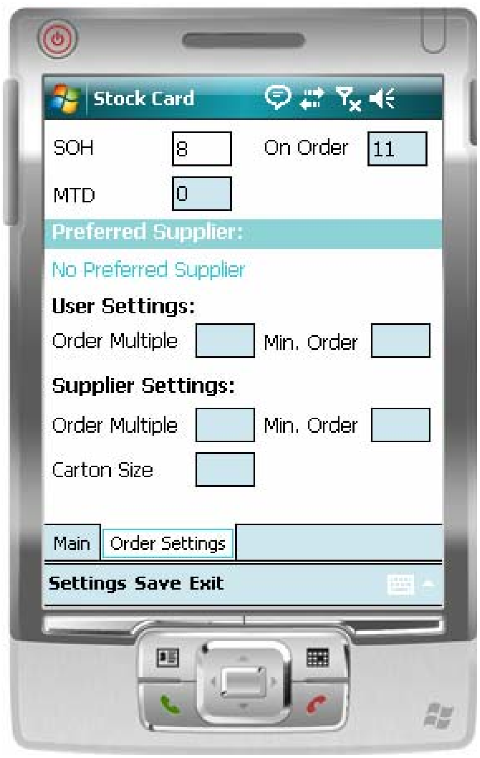

Figure 3.4

4 Stocktake

4.1 Setting Up Stocktake Options

It is necessary to set some options to tell PharmaScan the rules to follow for adding items to a Stocktake.

1. From the main screen tap the 'Settings' button locate at the bottom of the screen. This will open a new window with three tabs:

2. The first tab is the 'General' tab (see Figure 4.1.1), this has two options:

- **Display Active Stock Only** – If this option is ticked only active stock will be displayed when searching for stock.
- **Select Item On Click** – If this option is ticked the item will be displayed by simply selecting the item from the list. If this option is not ticked then the item will be displayed after you select the item from list and then tap 'Select'.

3. The second tab is the 'Stocktake' tab (see Figure 4.1.1), this has three options:

- **When an item is re-entered** – This option allows you to choose what happens when you come across an item that's SOH you have already entered (usually when the same item appears in more than one place within a store). There are there options to choose from:
  - o **Add to SOH** – This will add the new items to the current SOH.
  - o **Replace SOH** – This will replace the current SOH with the new items.
  - o **Prompt for Add/Replace** – This will display a prompt when new items are found allowing you to select whether you want to Add or replace the SOH. This is the default option.
- **Add Every item to existing SOH** – This option allows you to always add the quantity entered to the item's SOH (rather than replace the SOH).
- **Display Numeric keypad** – This will allow you tap in values such as an item's PLU, the item's barcode or the quantity of an item.

4. The final tab is the 'Connection' tab and this is purely used in setting up the PharmaScan connection. This tab should not be changed unless advised by Customer Support.

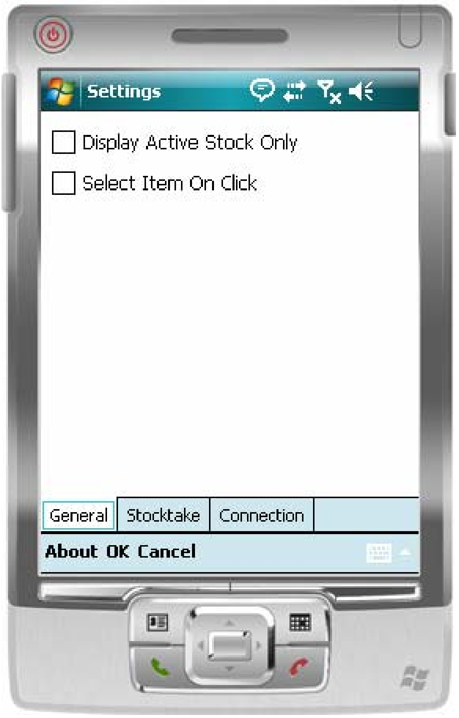

Figure 4.1.1

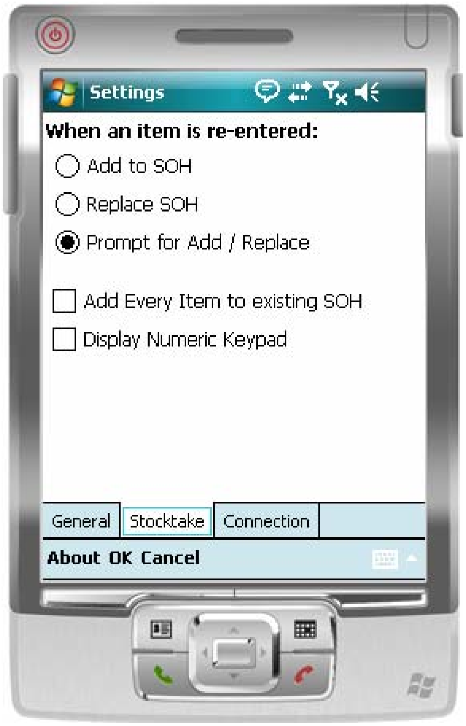

Figure 4.1.2

4.2 Starting/Continuing A Stocktake

1. To start (or continue) a Stocktake select the ‘Stocktake’ option from the main menu.

✍**Note:** It is important to understand that all SOH modifications occur ‘live’.

2. A prompt may appear asking if you want to continue the previous Stocktake ‘session’ or to close that session and start a new session.

✍**Note:** The only importance of starting a new session is to determine if an item is being scanned for the first time or if it has already been scanned (as different rules may apply based on the settings in ‘Options’). Once a selection is made the Stocktake window will be opened (either a new ‘blank’ session or the previously saved ‘session’)

3. The stocktake window will be displayed (see Figure 4.2.1).
   - **Product** – This will allow you to search for a product by either:
     - o Scanning in a barcode.
     - o Entering in a PLU.
     - o Entering in a description (or part of).
   - **Qty** – When the item is display you may amend the quantity using the keypad. Tap ‘Enter’ to save your changes.
   - **Product Name & SOH** – Items saved will be added to the list. Most recent appears at the top of the list.
   - **<** – This is a backspace.
   - **Clear** – This will clear the Product or Qty field.
   - **PLU (No PLU)** – This will change the ‘Product Name & SOH’ to display PLU, Product Name and SOH’ (see Figure 4.2.2). Tapping ‘No PLU’ in Figure 4.2.2 will revert back to the Figure 4.2.1 display.
   - **Enter** – Tab enter when you want to save the item and scan in the next item

4. Once you have completed your stocktake tap ‘Exit’ to finish.
   Remember you can stop the stocktake at anytime even if you haven’t finished, as the next time you select stocktake from the main menu if will ask you if you want to continue on with you last stocktake.

Figure 4.2.1

Figure 4.2.2

4.3 Rescanning An Item

1. If you scan in (or enter a PLU of) an item that has already been entered you will be prompted with the following (see Figure 4.3.1).

2. This message will only appear if you selected the 'Prompt for Add / Replace' option in 'Stocktake' tab of 'Settings' module.
   You will then have the option to select:
   - **Add** – This will add the item to the already updated SOH.
   - **Replace** – This will replace the current SOH.
   - **Cancel** – Select this if you have selected this product by mistake and wish to return to the stocktake window.

3. Depending on what other option you selected in the 'Stocktake' tab of 'Settings' module will determine what else will happen when an item has been entered in twice (refer to section: ***4.1 – Setting Up Stocktake Options***).

Figure 4.3.1

4.4 Adding A Barcode To An Item

1. When performing a stocktake, if you scan in a barcode of an item and the barcode is not found the follow prompt will be displayed (see Figure 4.4.1).

Figure 4.4.1

2. To add this barcode to an item, select ‘Yes’.

3. Selecting ‘Yes’ will display the ‘Add Barcode’ window, prompting yo to search for the product (by description or PLU). Tap in the description or PLU of the item you wish to add the barcode to then tap ‘OK’ to select it from the list (see Figure 4.4.2).

Figure 4.4.2

4. The item description and PLU will be displayed on the screen, tap ‘OK’ to confirm that you wish to add the barcode to the product.

5. You will then returned to the stocktake screen.

4.5 Stock Adjustments

All stock adjustments made in the Stocktake function will be recorded in LOTS.
The ‘Reason’ field in LOTS (i.e. reason for adjustment) will be set to ‘PharmaScan Stocktake’ for all adjustments made within the PharmaScan Stocktake module.

5 Orders

The Orders module of PharmaScan provides the ability to modify existing Orders that have not yet been transmitted, as well as providing the ability to create new blank Orders.

✍**Note:** It is not possible to delete an Order using the PharmaScan software. If you wish to delete an order is must be performed in LOTS Orders.

5.1 Creating A New Order

This section explains how to create an order for a supplier. Section: ***5.2 – Modifying An Order*** explains how to add items to your order.

1. To create a new order tap the 'Orders' icon on the main menu.

2. This will open a new window displaying all existing Orders that have a status of ‘New’ (see Figure 5.1.1).

3. Selecting ‘New’ will display a new window prompting you to select the supplier you wish to order with (see Figure 5.1.2).

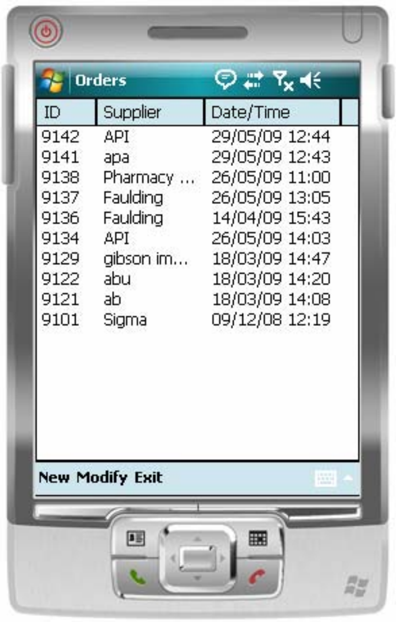

Figure 5.1.1

4. Use the ‘Search for Supplier’ field to enter in the first few letters of you supplier until it appears. Once it appears, highlight it then tap ‘OK’.

5. This will return you to ‘Orders’ screen (Figure 5.1.1). To add items to your order refer to section: ***5.2 – Modifying An Order***.

Figure 5.1.2

5.2 Modifying An Order

Modifying An Order explains how to add items to your order.

1. To modify an existing or new order tap the Orders icon on the main menu.

2. When taken to the order screen highlight the order you wish to modify and select 'Modify'.

3. This will display the 'Order Details' screen (see Figure 5.2.1)

4. Add items to your orders by either:
- Scanning in the barcode.
- Entering in the PLU.
- Enter in the description (or part of).

5. You can add as many items to an order as you like. Each item added will be listed on the screen (see Figure 5.2.2).

6. Each order number will be listed at the top of the screen in blue, followed by each item you have added. Each item is given a number from 1 onwards so you can tell how many items you have added to this particular order.
Also shown is:
- The description of the item.
- Its Real cost
- Its PLU.

7. The quantity field will default to the minimum order quantity, but can be edited to any value that is a multiple of the 'Carton Size' multiplied by the 'Order Multiple' for the selected supplier.

8. To remove an item from the order simply click on the Red Cross and answer 'Yes' to the confirmation message.

9. Once you have added an item to your order you can view or edit the items stock card by tapping the stock card icon. For more information on viewing or editing stock cards refer to section: ***3 – Stock Cards***).

10. The bottom of the window shows the total Retail Cost and the total Real Cost of the items on order.

11. To return to the main menu select 'Exit'.

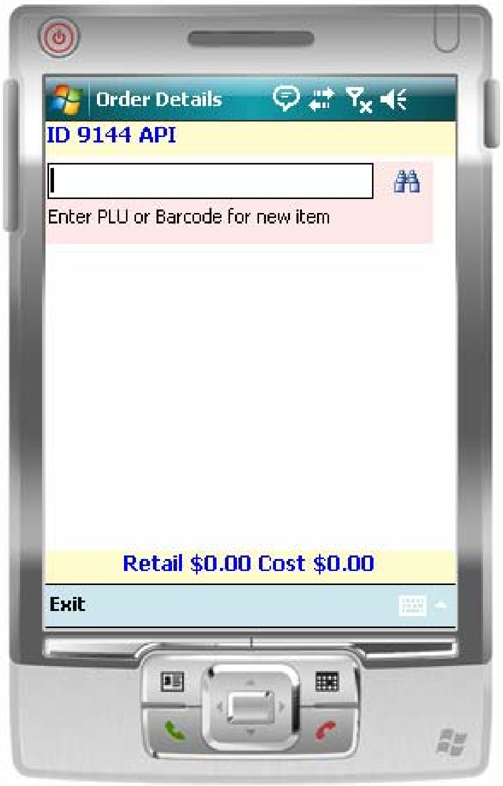

Figure 5.2.1

Figure 5.2.2

5.2.1 Adding An Item Without A Partcode

1. If you try to add an item to an order that does not have PLU for the selected supplier the following prompt will appear (see figure 5.2.1.1).

2. To add a Partcode to the item select 'Yes'.

Figure 5.2.1.1

3. This will take you to the 'Add Partcode screen, there are three option to set (see Figure 5.2.1.2:
   - **Enter the Partcode to add** – This field will allow you enter in the partcode you wish to use. After entering in the partcode, click on the binocular icon to ensure that the partcode is not assigned to another product for that supplier.
   - **Order Multiple** – This is the order quantity in multiples you are required to order in as defined by the supplier. For Example if you set this value to 4 then you would have to order either 4, 8, 12, 16 etc (multiples of 4).
   - **Carton Size** – The Carton Size is the number of retail units that is received from the supplier in each carton.

4. Once you have set all three options tap 'OK' to be returned to the 'Order Details' screen.

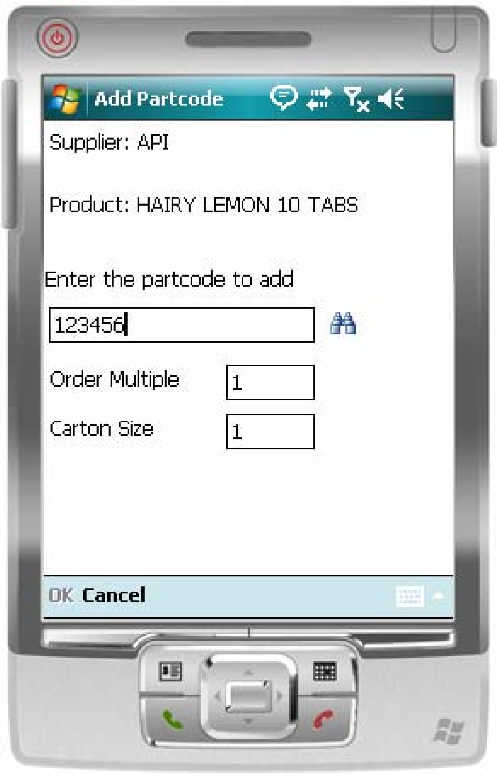

Figure 5.2.1.2

6 Receipting Invoice

The Receipting Invoice module allows you to select outstanding orders to receipt off, allowing you to check the invoice with what's been delivered.

6.1 Receipting An Invoice.

1. To check a receipt with what's being delivered tap the 'Receipting Invoice' icon on the main menu.

2. This will display the 'Invoices' screen (see Figure 6.1.1).

3. A list of invoices waiting to be actioned will be displayed. Highlight the Invoice you wish to check and then tap 'Select'.

4. This will display the 'Receipting' window (see Figure 6.1.2).

5. Each item on the order is listed in the bottom half of the window and the Invoice Number and Supplier are listed at the very top. This window has three options to set:

- **Product Code** – Scan in the item's barcode or enter in the items partcode or description.
- **Qty** – Enter in the quantity of items received. To match the 'IQty' value to the 'Qty' value tap the green equals (=) button.
- **View** – Once you have entered in the 'Product Code' and 'Qty' the 'IQty' field will turn a colour (see Figure 6.1.2).
  There are five colours and these colours can be viewed all at once or individually via the 'View' drop-down list, they are:
  - **All** – This will show all items, regardless of their status (colour).
  - **Not Supplied (Red)** – This colour defines not supplied items. Not supplied item means that they were not received
  - **Under Supplied (Aqua)** – This colour defines under supplied items. Under Supplied occurs when the 'IQty' value is less than the 'Qty' value.
  - **Receipted (Green)** – This colour defines fully receipted items. Receipted Items mean the exact amount order was received (e.g. – the 'IQty' and 'Qty' values are equal).
  - **Over Supplied (Yellow)** – This colour defines over supplied items. Over supplier occurs when 'IQty' value is grater than that of the 'Qty' value.

  If any of the items appear in grey that means the items has already been delivered.

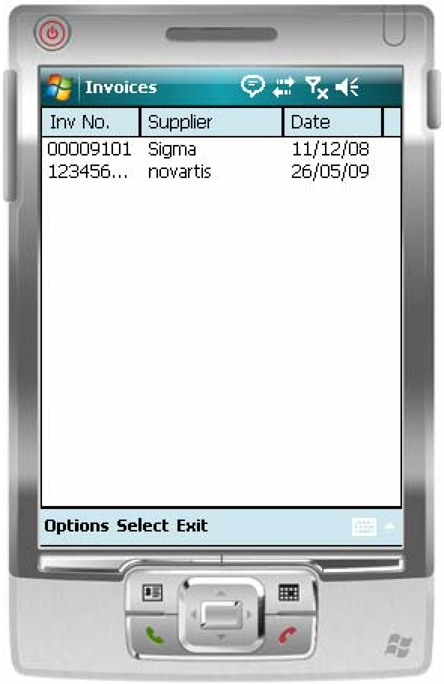

Figure 6.1.1

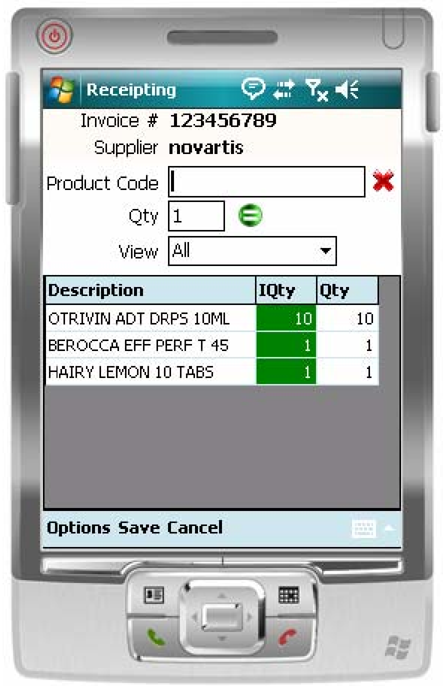

Figure 6.1.2

6. To accurately receipt off your invoice, scan in the product code of each item and then enter the quantity received.

✍**Note:** The Red Cross clears the 'Product Code' field.

7. There are three 'Options' available (see Figure 6.1.3):
   - **Zero** – This will allow you to reset the 'IQty' values to zero. This is particularly helpful because by default when an order is opened for the first time the 'IQty' will match the Qty'. By setting this value to zero will ensure you enter in the correct 'IQty' value as you count through the items received.
   - **Reset** – This will allow you to reset the 'IQty' values to their initial value.
   - **Legend** – This will display a legend detailing what each field colour refers to (see Figure 6.1.4). Select 'Exit' to return to the 'Receipting' screen.

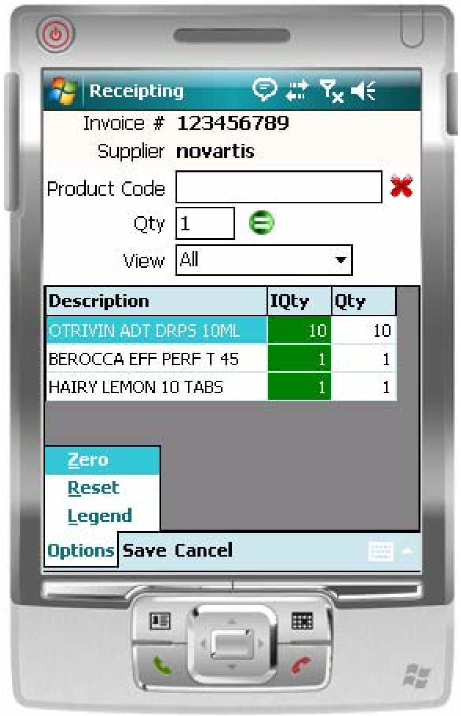

Figure 6.1.3

8. Once you have receipted off your invoice tap 'Save' to save the invoice to LOTS Orders and be returned to the Pharmascan main menu.

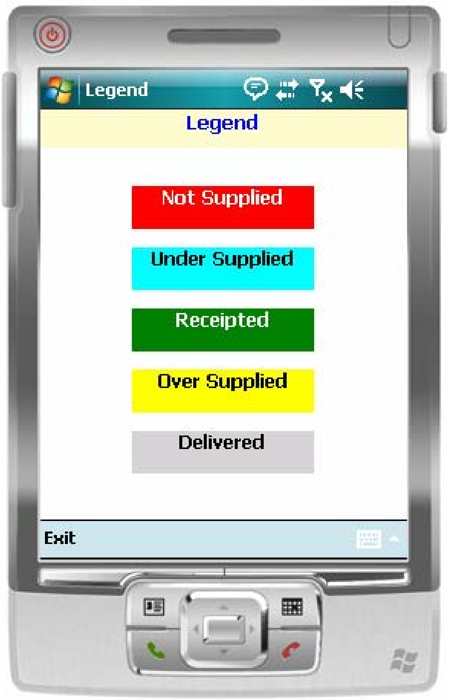

Figure 6.1.4

6.2 Scanning An Item Not On Order.

1. To check a receipt with what's being delivered tap the 'Receipting Invoice' icon on the main menu.

2. This will display the 'Invoices' screen (see Figure 6.2.1).

3. A list of invoices waiting to be actioned will be displayed. Highlight the Invoice you wish to check and then tap 'Select'.

Figure 6.2.1

4. When in the 'Receipting' window, if you scan in a barcode of an item that is not on order you will receive the following prompt (see Figure 6.2.2).

5. Select 'ok' to be returned to the Receipting screen.

Figure 6.2.2