

Tagging all Profender products to run detailed report within required timeline including retrospective view



RxWorks PIMS

File Tools Window Help

Save New First Prev Next Last List Find Add Edit Delete Print Reports Counter Stock Fees Apps Help

1 **Clipboards**  
Clinic Phone Book

2 **Task Panel**  
System Controller

3 **Abbott, Doug & Dianne**  
(no patient)

4 **Previews**

5 **Options**

**Options**

**A Client**

**B Patient**

**C Visit**

**D Finance**

**E Clipboard & Imaging**

**F Counter Sale**

**G Report & Reminder**

**H Item**

**I User**

**J Clinic**

**K Exit**

**Client Options**

- Client Address Details
- Client Multiple Addresses Types
- Client Categories
- Client Accounting Information
- Bank and Credit Card Details
- Spare Text, Number and Date Fields
- Marketing Schemes
- Formatted Name and Address

**Setup Assistance: Client Options**

This area allows you to customise the Client page as well as bank and credit card names for receiving payments. Move the mouse over topics for more specific help. More detailed assistance is available when you select the topic.

Notifications

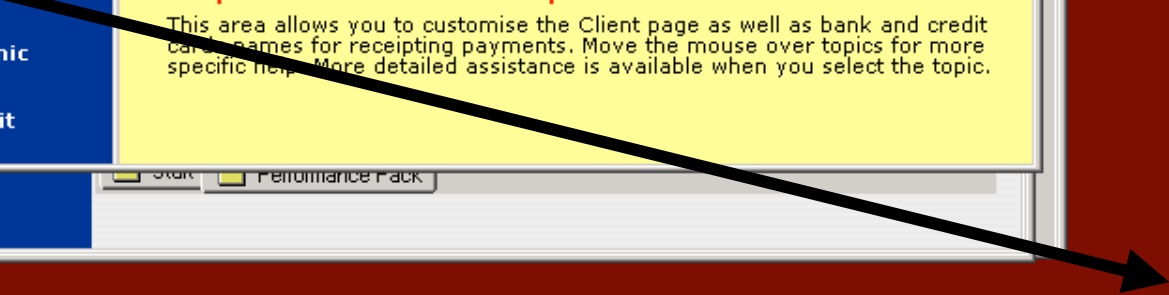
Links

- Content Search
- Forums
- Support
- Knowledge Base
- Log Off

Done

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OVR 9:38



Click here

**Clipboards**  
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**Options**

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- K Exit**

**Item Options**

- Item Categories and Stock Control
- Item Markup Groups
- Service Headings
- Income Groups for Financial Reporting
- Minimum Fee Levels
- General Ledger Account Interface
- Discount Schemes
- Schedules

**Drug Labels**

- Modify Header/Body/Footer Text

**Setup Assistance: Item (Fees)**

This section maintains Options for Fee Items. Specific help is invoked when mouse is over one of the topics. More detailed assistance is available when you select the topic.

select the first item on the menu

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Item Categories

Category Details

Category 1 Name: Income Group Breakdown ...

Category 2 Name: Not Used ...

Category 3 Name: Not Used ...

Category 4 Name: Not Used ...

Category 5 Name: Old System Code Converted ...

Stock Control Options

Run Inventory Below Zero

Back Order Start Date: 1/01/07

Save Cancel

It will display 5 category options. Each clinic will be different as some categories may already be set up and some may not. Examine items to see if a category Manufacturer already exists. If it does then use the existing options.

If it does not exist then do the following:

- Select a blank category options and type in the name "Manufacturer"
- Select the 3-dot button on the right hand side so it displays the sub-category options
- Select Add and add a subcategory option called 'Bayer'
- Save changes and exit Options

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# Switch off RX

Close RxWorks program and log in again. Note the changes you have made will not be effective unless you log off RxWorks and re-start the program.

Edit Record Tools Window Help

New First Prev Next Last List Find Add Edit Delete Print Reports Counter Stock Fees Apps Help

Promotion 1 At Evergreen Veterinary Hospital

1. Fee Details 2. Attachments 3. Categories and Insurance

Item Number: 999950 Category: [dropdown]

Item Name: Promotion 1 Minimum: [none]

Printed Name: [empty] Deactivated Date: [empty]

Service Heading: Promotions Stock Control:  Charge Default:

Use the default TAX for this item:

Fixed Component:

Standard Fee: [none] Income Group: Discount:Promotions

Default Value: 1 Cost Price: 0.00 TAX Rate: 10.00 %

Variable Component:

Description: [empty] Income Group: Discount:Promotions

Default: 1 Cost Price: 0.00 Special Price: 0.00 TAX Rate: 10.00 %

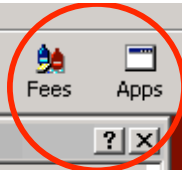
Description	Markup	Ex TAX	Inc T...
All Quantities	*0.00	0.00	0.00

Standard Fee [Add] [Edit] [Delete]

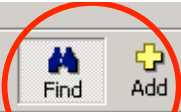
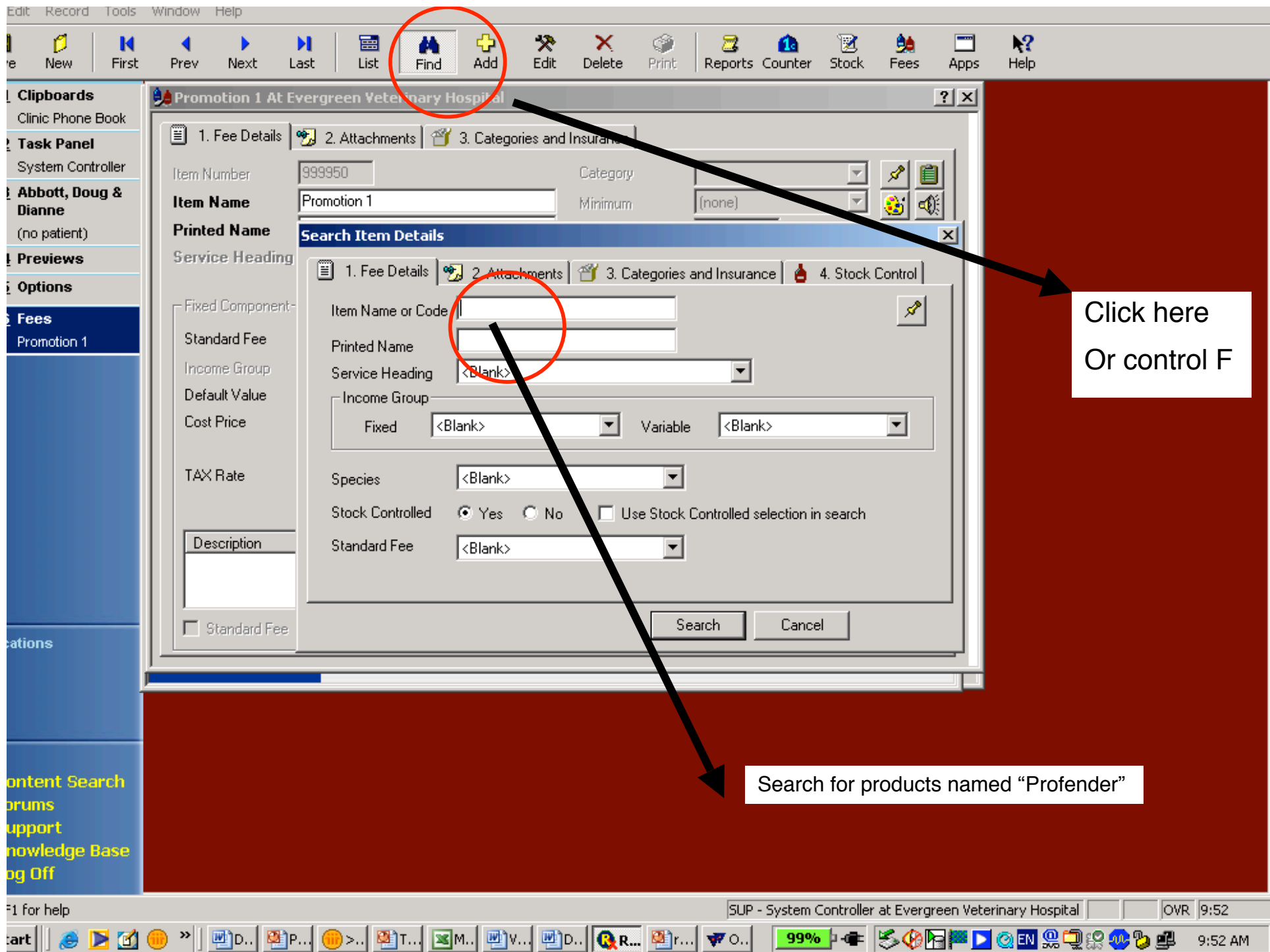
Stepped  Sliding [Add] [Edit] [Delete]

Content Search  
forums  
support  
knowledge Base  
log Off

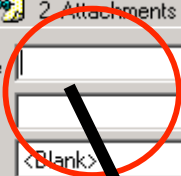
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Click here  
Or press F9



Click here  
Or control F



Search for products named "Profender"

- Clipboards
- Clinic Phone Book
- Task Panel
- System Controller
- Abbott, Doug & Dianne
- (no patient)
- Previews
- Options
- Fees
- Promotion 1
- ations
- Content Search
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- support
- Knowledge Base
- og Off



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- 5 **Fees**  
Profender Cats 2.5-5Kg (40)

Profender Cats 2.5-5Kg (40) At Evergreen Veterinary Hospital

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

Item Number: 622927      Account Name: No.

Item Name: Profender Cats 2.5-5Kg (40)

Printed Name: Search Item Details

Active Ingredients:

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

**Item Search Results (5 items)**

Item Name	Service	Species	Printed Name
Profender Cats 2.5-5Kg (40)	Flea, Worm & Tick Prepara...	Cat	Profender Cats 2.5-5Kg
Profender Cats 2.5-5Kg X 2	Flea, Worm & Tick Prepara...	Cat	
Profender Cats 5-8Kg (40)	Flea, Worm & Tick Prepara...	Cat	Profender Cats 5-8Kg
Profender Cats 5-8Kg X 2	Flea, Worm & Tick Prepara...	Cat	
Profender Kittens 0.5-2.5Kg (40)	Flea, Worm & Tick Prepara...	Cat	Profender Kittens .05-2.5Kg

OK      Cancel

- Notifications
- Links
- Content Search
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1. Fee Details   2. Attachments   3. Categories and Insurance   4. Stock Control

Item Number: 622928   Account Name:   No.

Item Name: Profender Cats 5-8Kg (40)

Printed Name: Profender Cats 5-8Kg

Active Ingredients:

Item Schedule:

Registration No.: 666

**Categories**

Income Group Breakdown: Wormer Round-Hook, Worm

Not Used

Not Used

Not Used

Old System Code:

**Discount Scheme**

Level	Rate	Discount
Scheme A	Flea, Worm & ...	0.00
Scheme B	Flea, Worm & ...	0.00
Scheme C	Flea, Worm & ...	0.00
Scheme D	Flea, Worm & ...	0.00

Add   Edit   Delete

Markup Group: Parasiticides SA End (50%)

Classification Exceptions...

You will view 4 tab bars one of which will be 3. *Categories and Insurance*. In categories and Insurance you should now have a category named Manufacturer. Click the down arrow and select Bayer to tag the Profender product with the correct tag. Save the changes by pressing F10 or choose the save button from the header row. Search for other Profender products and repeat step 10-12

To Run Report on Usage

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**Task Panel**

**Evergreen Veterinary Hospital**  
Monday, 6 August 2007

**Activities & Resources**

- Activities & Resources
- Scripting & Batch Reports
- Tools and Utilities
- Excel Data Wizards

**Resources**

View | Print | Edit | Email | Open | Explore

Document Name	Last Modified	Size (K)
RxWorks Performance Pack Fee Builder 4 Demo	12/04/07	20289

Start Performance Pack

Click here  
Or press F4

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Reports & Documents

ations

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forums  
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Reports

- A Till Reconciliation & Banking Lists
- B Accounts, Debtors & Tax Analysis
- C Price Lists & Inventory Control**
- D Reminder Notices & Statistics
- E Financial & Statistical Analysis
- F Mail Merge, Labels & Target Marketing
- G Query & Export Data
- H Setup & Document Editing

- 1 Price Lists
  - Basic price list
  - Standard price list
  - Detailed price list
  - Pricing History
- 2 Valuations & On Hand List
  - Inventory Valuation
  - Physical Inventory Count
- 3 Orders and Receipts
  - Order
  - Receipt
- 4 Inventory Movement, Usage and Purchase Statistics
  - Inventory Movement
  - Purchase Analysis
  - Product & Services Sales Analysis
  - Products & Services Sales Analysis by Client
- 5 Restricted Drug Sales and Audits
  - Restricted Drug Sales
  - Audits & Security

Select C. Price List & Inventory

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**Reports**

- A** Till Reconciliation & Banking Lists
  - 1 Price Lists
    - Basic price list → Pricing History
    - Standard price list →
    - Detailed price list →
- B** Accounts, Debtors & Tax Analysis
- C** Price Lists & Inventory Control
- D** Reminder Notices & Statistics
- E** Financial & Statistical Analysis
- F** Mail Merge, Labels & Target Marketing
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**2** Valuations & On Hand List

- Inventory Valuation →
- Physical Inventory Count →

**3** Orders and Receipts

- Order →
- Receipt →

**4** Inventory Movement, Usage and Purchase Statistics

- Inventory Movement →
- Purchase Analysis →
- Product & Services Sales Analysis →
- Products & Services Sales Analysis by Client →

**5** Restricted Drug Sales and Audits

- Restricted Drug Sales → Audits & Security

ifications

ks  
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Select 4. Inventory Movement

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**Reports**

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**H** Setup & Document Editing

**Inventory Movement**

Preview | Print | **Export** | Excel | PDF | Setup | Cancel

Date Range: This Financial Year  
01/04/06 | 06/08/07

**Restrictions**

No Category Restrictions

Restrict To Category

Income Group Breakdown (name) [ ] (value) [ ]

Restrict to Service Heading [ ]

Only show items with sales greater than [ ]

**Options**

Show totals at category level

Include deactivated items

Inventory Clinic: Evergreen Veterinary Hospital

4. Run report

1. Set date range

2. Select restrict to category  
3. Choose Category = manufacturer  
and Sub-category = bayer

Done

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OVR 10:05