



LOTS User Manual – Point Of Sale

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1 OPTIONS

1.1 POS Options

The tab 'POS Options' allows you to define the main POS options (see Figure 1).

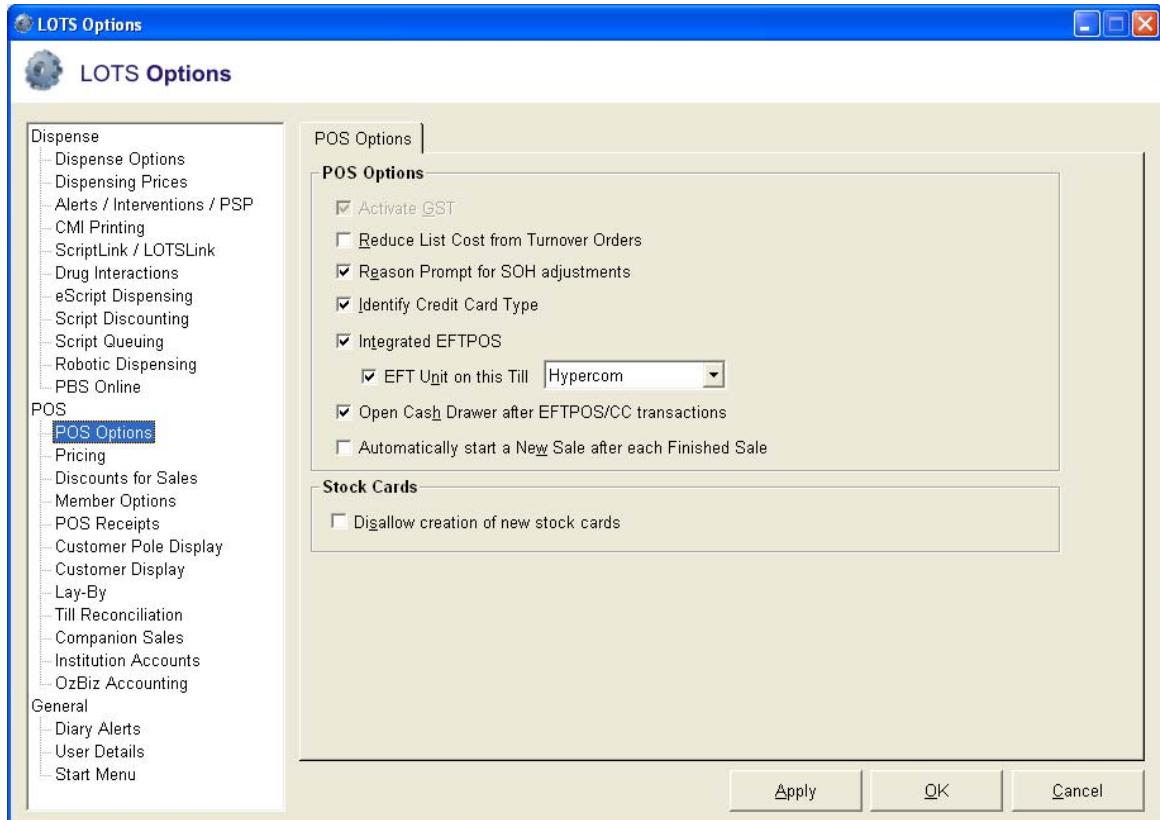


Figure 1

Option	Description
Activate <u>GST</u>	As GST is legally required, this option is always ticked and cannot be changed.
<u>Reduce List Cost from Turnover Orders</u>	When unticked, this option ensures that the list cost value will never be decreased when an electronic invoice is received. This option only relates to turnover orders as supplier price files will still update list cost where necessary. Note: Some suppliers send back real cost in the list cost fields, so this option was implemented to ignore this.
<u>Reason Prompt for SOH adjustments</u>	If this option is ticked, when you adjust SOH a reason prompt will appear asking you to specify why the SOH is being changed. This is also important as it can be reported on via the Stock Adjustment Report.
<u>Identify Credit Card Type</u>	If this option is ticked a prompt will appear when a customer purchases items using a credit card asking you to specify the credit card type (Visa, MasterCard etc).
<u>Integrated EFTPOS</u>	This needs to be ticked when using Integrated EFTPOS. Use the drop-down list to select the type of Integrated EFTPOS unit you use. For further information on this option please call your local state office on 1300 669 865.

Option	Description
EFT <u>Unit</u> on this Till	This option is only active if 'Integrated EFTPOS' is ticked. If there is an EFTPOS unit on this till ensure you tick this option and select the appropriate type.
Open <u>Cash</u> Drawer after EFTPOS/CC transactions	If you wish the till to open after an EFTPOS or credit card transaction then tick this option. It is especially useful if you allow customers to request 'cash out'.
Automatically start a <u>New</u> Sale after each Finished Sale	Tick this option to remain in the 'New Sales' screen after a sale has been finalised. If you would like to return to the initial Sales screen after each finalised sale then do not tick this option.
<u>Disallow</u> creation of new stock cards	If this option is ticked then new stock cards will not be allowed to be created. This option is often ticked for sites connected to a Head Office.

1.2 Pricing

The tab 'Pricing' will allow you to define all of the POS pricing options (see Figure 2).

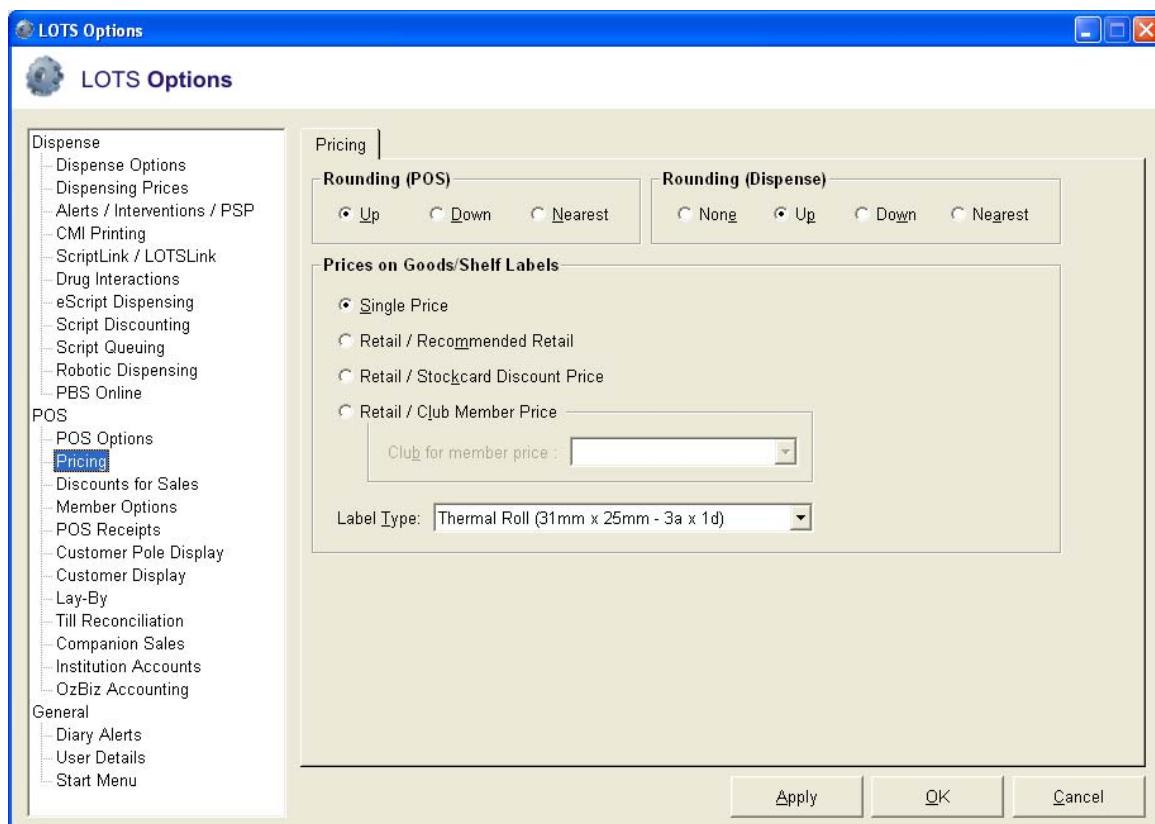


Figure 2

Option	Description
Rounding (POS)	This section allows you to set the rounding rules for all of your POS transactions: Up, Down or Nearest (5 cents). Note: The ACCC strongly recommends that POS and Dispense rounding is set to 'Nearest'.
Rounding (Dispense)	This section allows you to set the rounding rules for all of your scripts: None, Up, Down or Nearest. Note: The ACCC strongly recommends that POS and Dispense rounding is set to 'Nearest'.
Prices on Goods/Shelf Labels	This option allows you to specify how/or if you would like discount prices to appear on your goods/shelf label. <ul style="list-style-type: none"> • Single Price – This will just print the single price of product on the label. • Retail / Recommended Retail – This is a double label, the first half of the label will display the price your pharmacy is selling the product for, while the second half of the label will display the Recommended Retail Price. • Retail / Stock card Discount Price – This is a double label, the first half of the label will display the retail price, while the second half of the label will display your pharmacy's discounted Stock Card Price (see section 3.2 – 1 Pricing Tab) • Retail / Club Member Price – This is a double label, the first half of the label will display the retail price, while the second half of the label will display your pharmacy's discounted Club Member Price. You must specify which club the discount applies

Option	Description
	to in the 'Club for member price field.
Label Type	Use the drop-down box to specify your label type. Default setting is: "Thermal Roll (31mm x 25mm - 3a x 1d)".

1.3 Discounts For Sales

The 'Discounts for Sales' section allows you to define all POS discounts (see Figure 3).

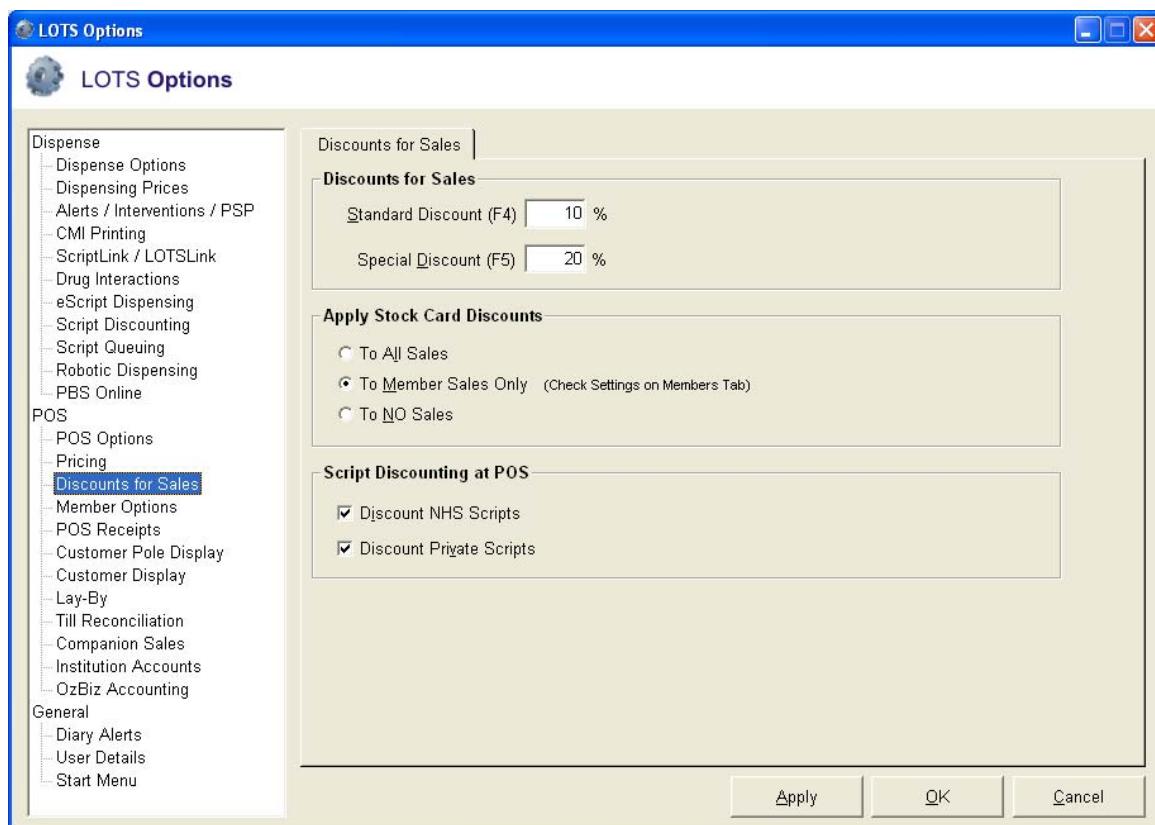


Figure 3

Option	Description
Discounts for Sales	<p>Standard Discount (F4) – This option allows you to set your own 'standard' discount amount for the F4 Function keyboard key when making a sale. The default is 10%.</p> <p>Special Discount (F5) – This option allows you to set your own 'special' discount amount for the F5 Function keyboard key when making a sale. The default is 20%.</p>
Apply Stock Card Discounts	This option allows you to specify if you would like discounts to apply 'To All Sales', 'To Member Sales Only' or 'To No Sales'.
Script Discounting at POS	If 'Discount NHS Scripts' is ticked it will allow you to apply a discount to NHS items when making a sale. If 'Discount Private Scripts' is ticked it will allow you to apply a discount to Private items when making a sale.

1.4 Member Options

The section 'Member Options' allows you to define all member settings at POS (see Figure 4).

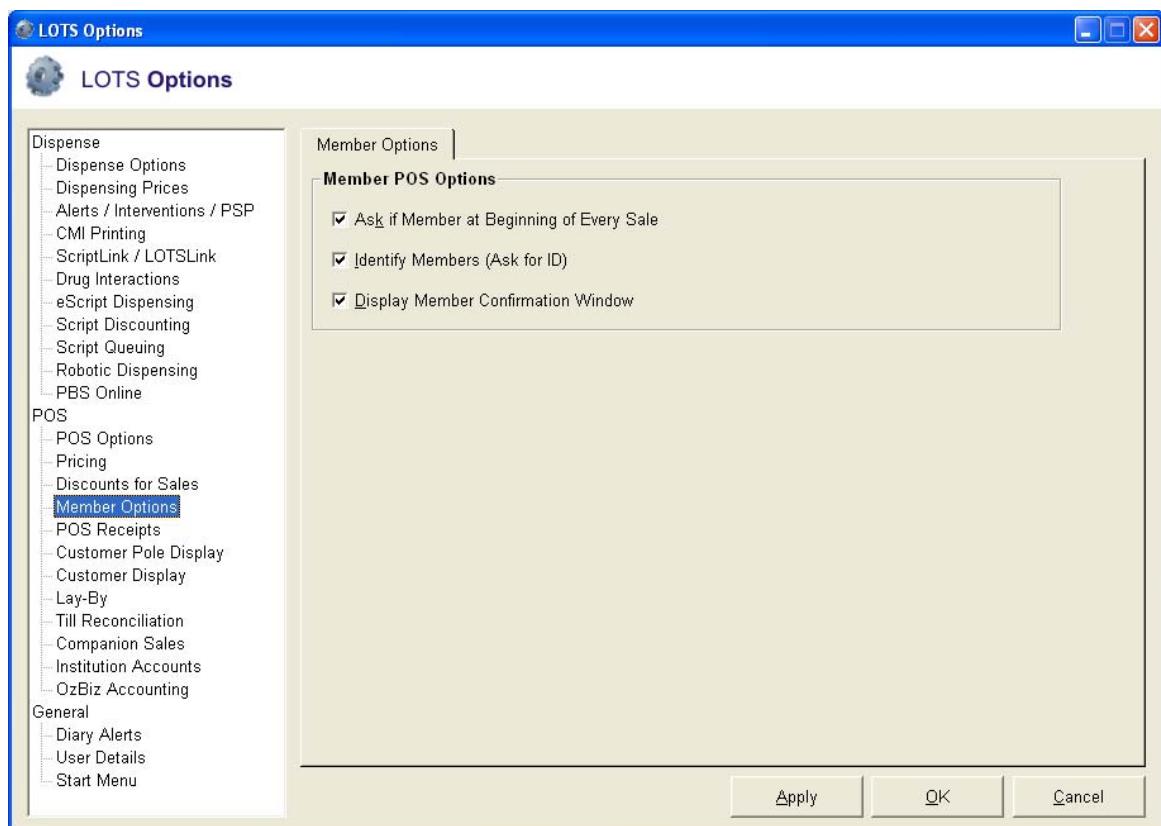


Figure 4

Option	Description
<u>Ask</u> if Member at Beginning of Every Sale	If this option is ticked every time you start a sale, a message will prompt asking you if this customer is a club member.
<u>Identify</u> Member (ask for ID)	This option can only be ticked (or unticked) if 'Ask if Member at beginning of Every Sale' is ticked, otherwise it is greyed-out. If this option is ticked and you select yes to the prompt asking if the customer is a member then you will be required to enter in the customer name.
<u>Display</u> Member Confirmation Window	If this option is ticked then when the customer is selected the customers details (full name, address & message) will appear so you can confirm the customer details are correct.

1.5 POS Receipts

The section 'POS Receipts' allows you to define all the receipt and voucher options (see Figure 5).

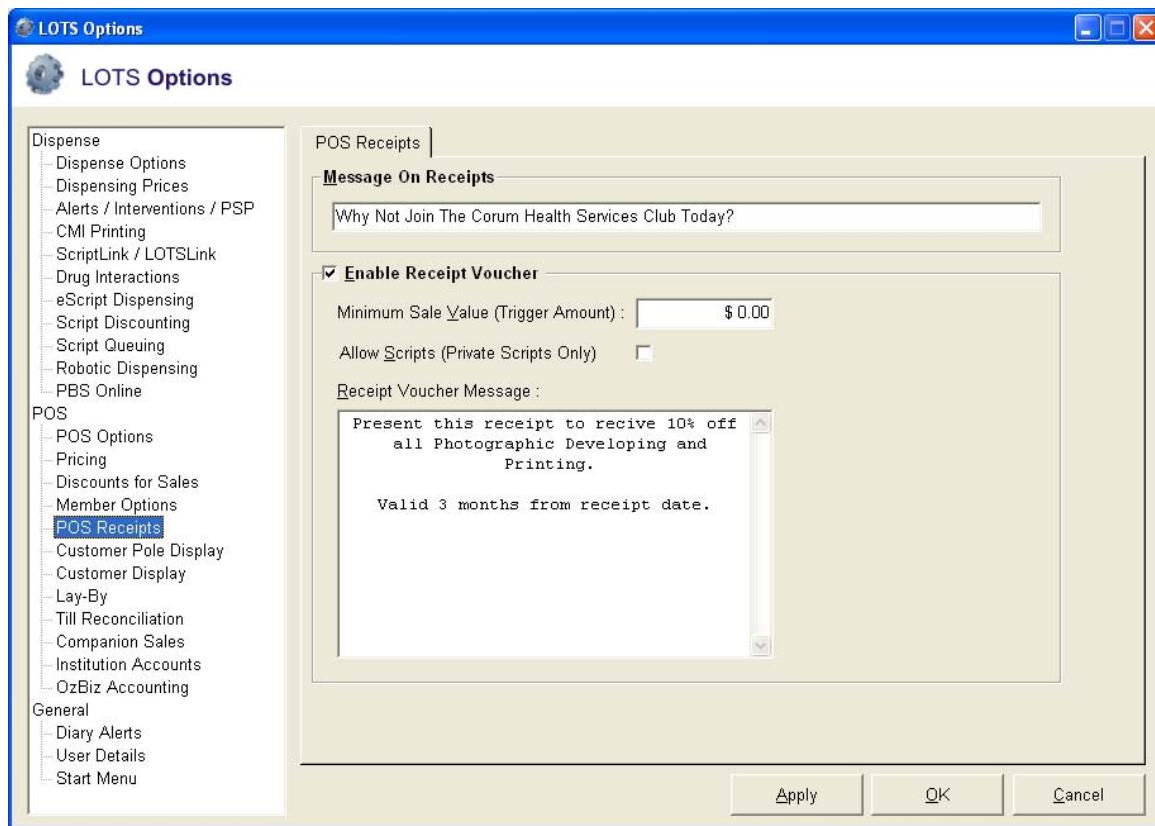


Figure 5

Option	Description
Message On Receipts	This is the message that will appear on the bottom of all POS (Till) receipts.
Enable Receipt Voucher	If you wish to apply a voucher or special offer to appear on the bottom of your POS receipts tick this option (see section 12.1 to setup this feature.)
Minimum Sale Value (Trigger Amount)	This field will allow you to set an amount that the customer must spend in one transaction before the voucher/special offer will be printed on the receipt.
Allow Scripts (Private Scripts Only)	If you wish to allow private scripts to be included in the Trigger Amount, tick this option.
Receipt Voucher Message	This is a message that will appear on all receipts that are eligible for the voucher/special offer. It is advised that you specify the pharmacy name, voucher amount/special offer and expiry date (if necessary) on the receipt. Press Alt+Enter to begin a new line.

1.6 Customer Pole Display

The tab 'Customer Pole Display' allows you to enable your customer pole display and set your customer pole display till message (see Figure 6).

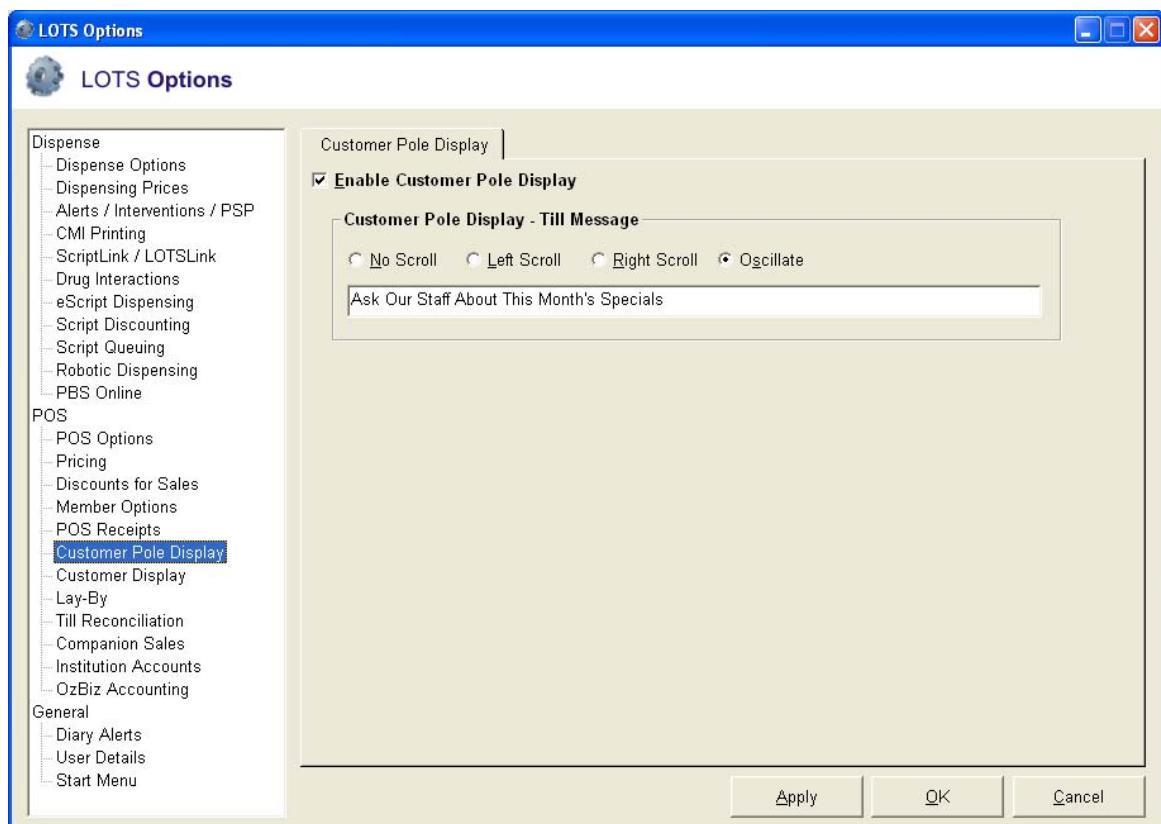


Figure 6

Option	Description
<u>Enable Customer Pole Display</u>	To activate your customer pole display you must tick this option. Use the text box to enter in the customer pole display message you wish to be shown.
<u>No Scroll</u>	If you do not wish for the customer pole display message to scroll select this option.
<u>Left Scroll</u>	If you wish for the customer pole display message to scroll to the left select this option.
<u>Right Scroll</u>	If you wish for the customer pole display message to scroll to the right select this option.
<u>Oscillate</u>	If you wish for the customer pole display message to oscillate from left to right select this option.

1.7 Customer Display

The section 'Customer Display' allows you to set your customer display screen (see Figure 7).

To make use of the customer display you will require a second monitor. When a sale is taking place this second monitor will display the name and price of the item the customer is purchasing.

When no sales are being processed the customer display screen idles and switches between the loaded images every so many seconds as defined in the 'Show images for <#> seconds each' field.

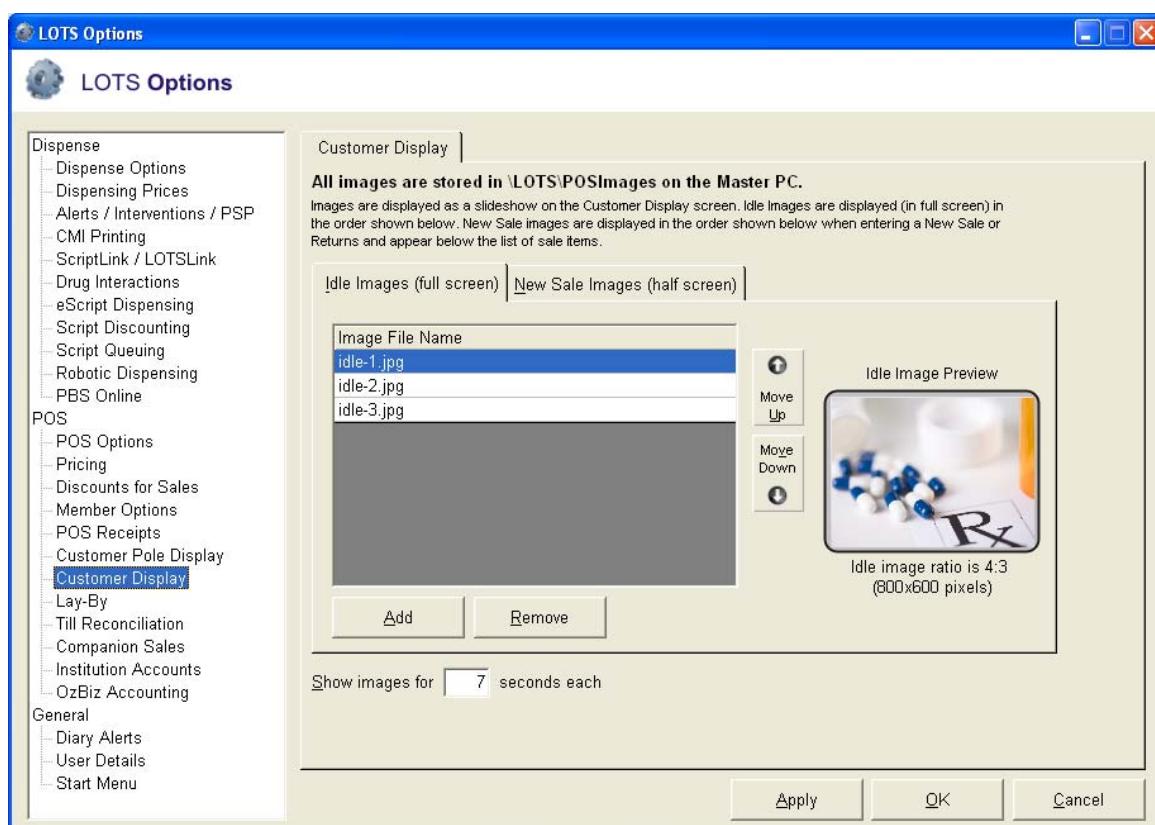


Figure 7

Option	Description
<u>Idle Images (full screen)</u>	This tab allows you to set the full screen images you want to be displayed when the screen is in idle (not being used). The ratio for idle images is 4:3 (e.g. 800 x 600 pixels).
<u>New Sale Images (half screen)</u>	This tab allows you to set the half screen images you want to be displayed. The ratio for idle images is 8:2.35 (e.g. 800 x 235 pixels).
<u>Add</u>	This will display the 'Open' window allowing you to add an image to the tab selected.
<u>Remove</u>	This option will allow you to Remove an image from the tab selected.
<u>Move Up</u>	The images are displayed in order from top to bottom, for example in Figure 7 'idle-1.jpg' will be shown first, then 'idle-2.jpg' and lastly 'idle-3.jpg'. Use this option to change the order of the images by moving an image up the list.

Option	Description
<u>Move Down</u>	The images are displayed in order from top to bottom, for example in Figure 7 ‘idle-1.jpg’ will be shown first, then ‘idle-2.jpg’ and lastly ‘idle-3.jpg’. Use this option to change the order of the images by moving an image down the list.
<u>Show images for <#> seconds each</u>	This field will allow you to select the number of seconds you want to display each image for, before changing to the next image.

1.8 Lay-By

The 'Lay-By' section allows you to set up all your Lay-By Options (see Figure 8).

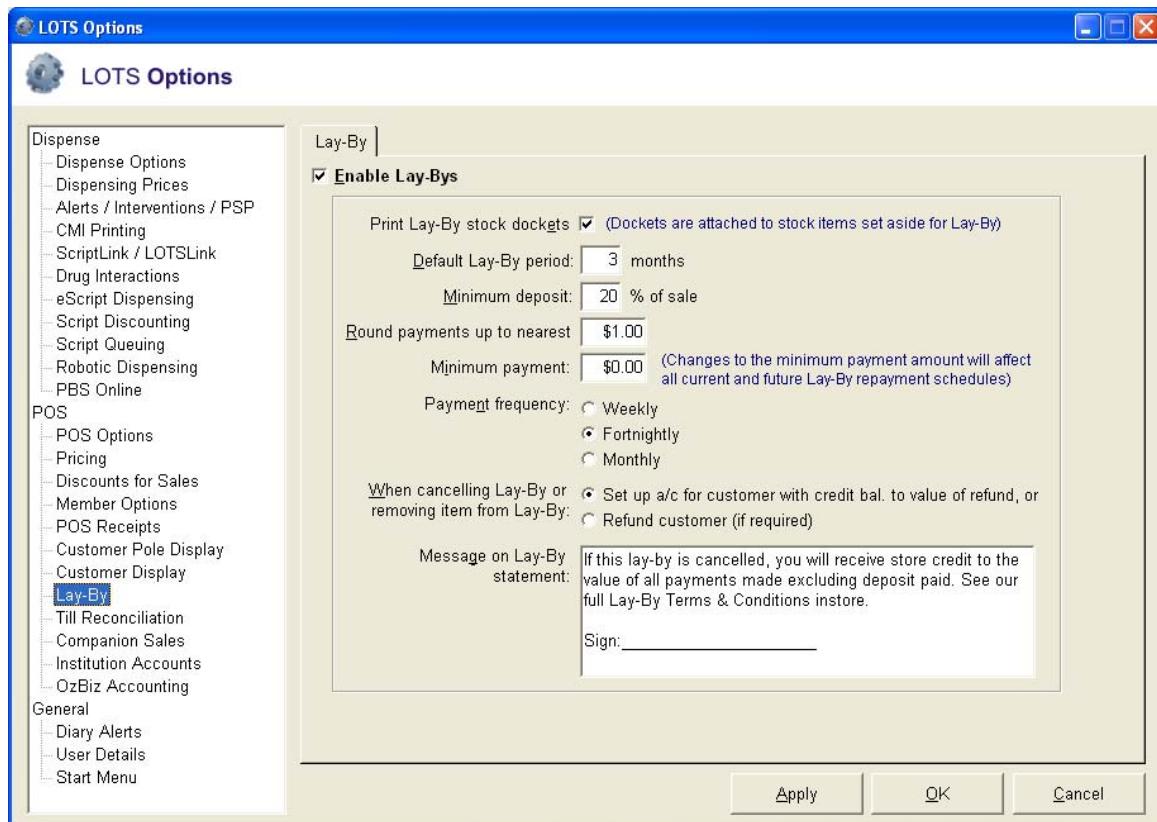


Figure 8

Option	Description
<u>Enable Lay-Bys</u>	Tick this option to turn on the Lay-Bys module.
<u>Print Lay-By stock dockets</u>	If ticked this will automatically print a lay-by receipt that can be attached to item set aside for lay-by. The receipt will detail how much the item is being sold, how much has been paid and the outstanding amount.
<u>Default Lay-By period</u>	Set the default number of months for the Lay-By payment period. You can override this option when performing a Lay-By.
<u>Minimum deposit</u>	This field allows you to set a minimum deposit that must be paid for a Lay-By.
<u>Round payments up to nearest</u>	Set the value you want payments rounded up to.
<u>Minimum payment</u>	Set the minimum payment amount. This will affect current Lay-Bys as well as future Lay-Bys.
<u>Payment frequency</u>	Set the payment frequency to either Weekly, Fortnightly or Monthly.
<u>When cancelling Lay-By or removing item from Lay-By</u>	If a customer requests to cancel or remove an item from a Lay-By you can either refund the customer the money or you can set the customer up with an account (if they do not already have one) and then credit the account with the value of the Lay-By.
<u>Message on Lay-By statement</u>	This field allows you to type a message that will appear on the lay-by statement. The default message is shown in Figure 8.

1.9 Till Reconciliation

The section 'Till Reconciliation' allows you to set up all your Till Reconciliation and Cash Lift Options (see Figure 9). For more information refer to section **2.15 – Till Reconciliation & Cash Lift**.

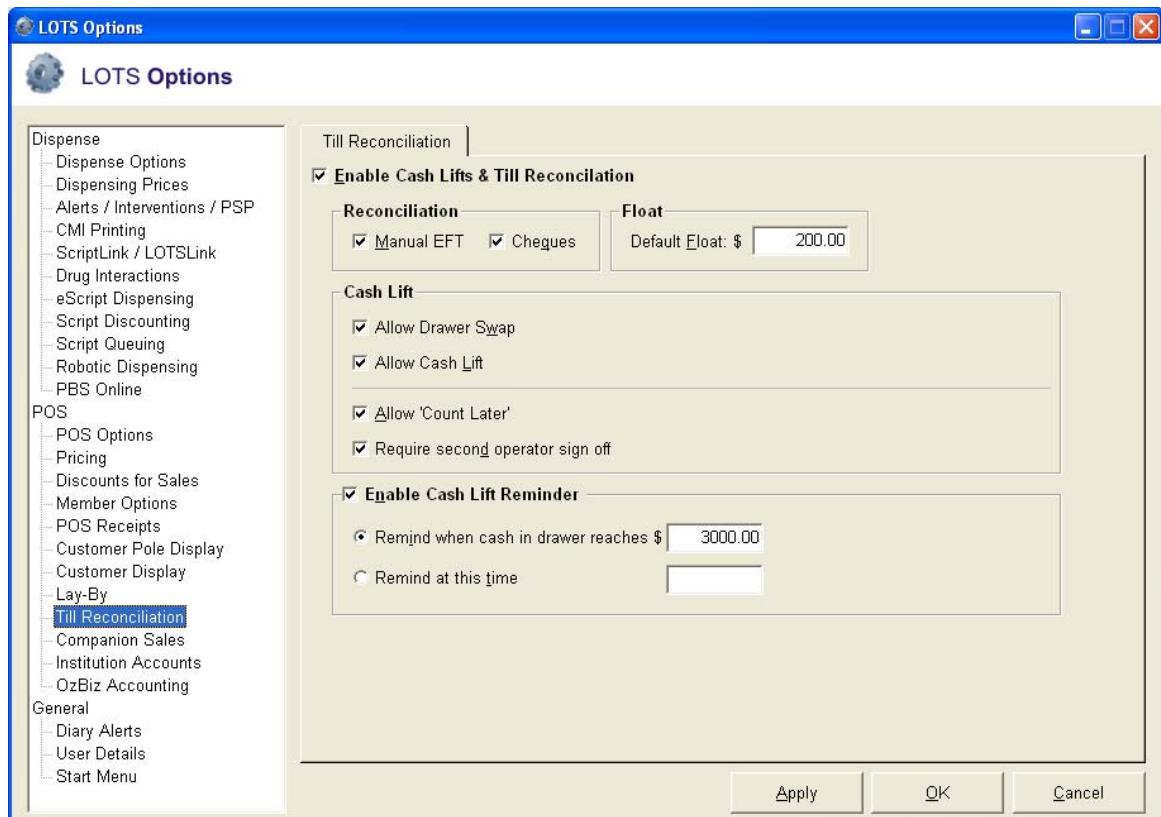


Figure 9

Option	Description
Enable Cash Lifts & Till Reconciliation	To turn on the 'Cash Lift' and 'Till Reconciliation' functionality tick this option.
Manual EFT	Tick this box if you wish to include a field so you can enter in a value for 'Manual EFT' when performing a Till Reconciliation.
Cheques	Tick this box if you wish to include Cheques when performing a Till Reconciliation.
Default Float	Use the Default Float field to enter in your float amount (specific for each till).
Allow Drawer Swap	A draw swap it when you remove the current cash draw from the register and replace it with another cash draw. Tick this option if you allow drawer swaps to be performed.
Allow Cash Lift	Tick this option if you want to allow physical cash lifts to be performed.
Allow 'Count Later'	Tick this option if you do not require the cash to be counted as soon as the cash lift is performed.
Require second operator sign off	If you require a second operator to watch and sign off on the cash lifts being performed then tick this option. A second operator will need to enter their User ID and password

Option	Description
Enable Cash Lift Reminder	Tick this option if you want to be reminded to perform a cash lift. A cash lift will allow you to set an amount that when reached will prompt you that the cash in the till should be removed.
Remind when cash in drawer reaches	If this option is selected then enter in a dollar amount, that when reached will prompt you to perform a cash lift.
Remind at this time	If this option is selected then enter in a time. When that time comes a prompt will appear asking you to perform a cash lift. This may be particularly useful for pharmacies that close late but perform their till reconciliation earlier (e.g. 5:00pm).

1.10 Companion Sales

The section 'Companion Sales' allows you to set up a default companion text which will be displayed on your customer display unit(s) at the till (see Figure 10). For more information refer to section **3.8 – Set Product-Specific Companion Text**.

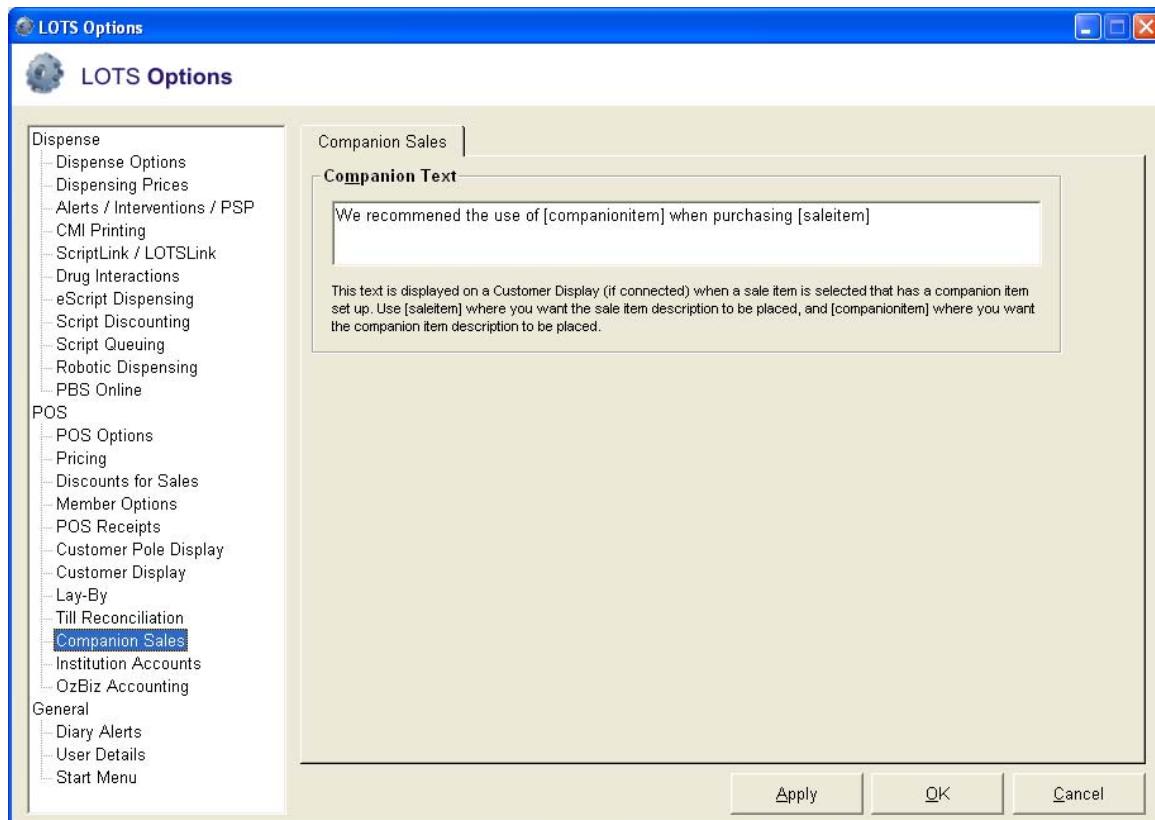


Figure 10

Option	Description
Companion Text	<p>Use this field to enter in the default companion text you wish to use for all companion items. Use the tags</p> <ul style="list-style-type: none">• [companionitem] – For the name of the companion item being recommended• [saleitem] – For the name of the sale item being sold. <p>These tags will automatically input the name of the companion item/sale item being recommended/sold. The Companion text message only appears on the customer display screen if connected.</p>

1.11 Institution Accounts

The section 'Institution Accounts' allows you to set up institution accounts in LOTS Dispense (see Figure 11).

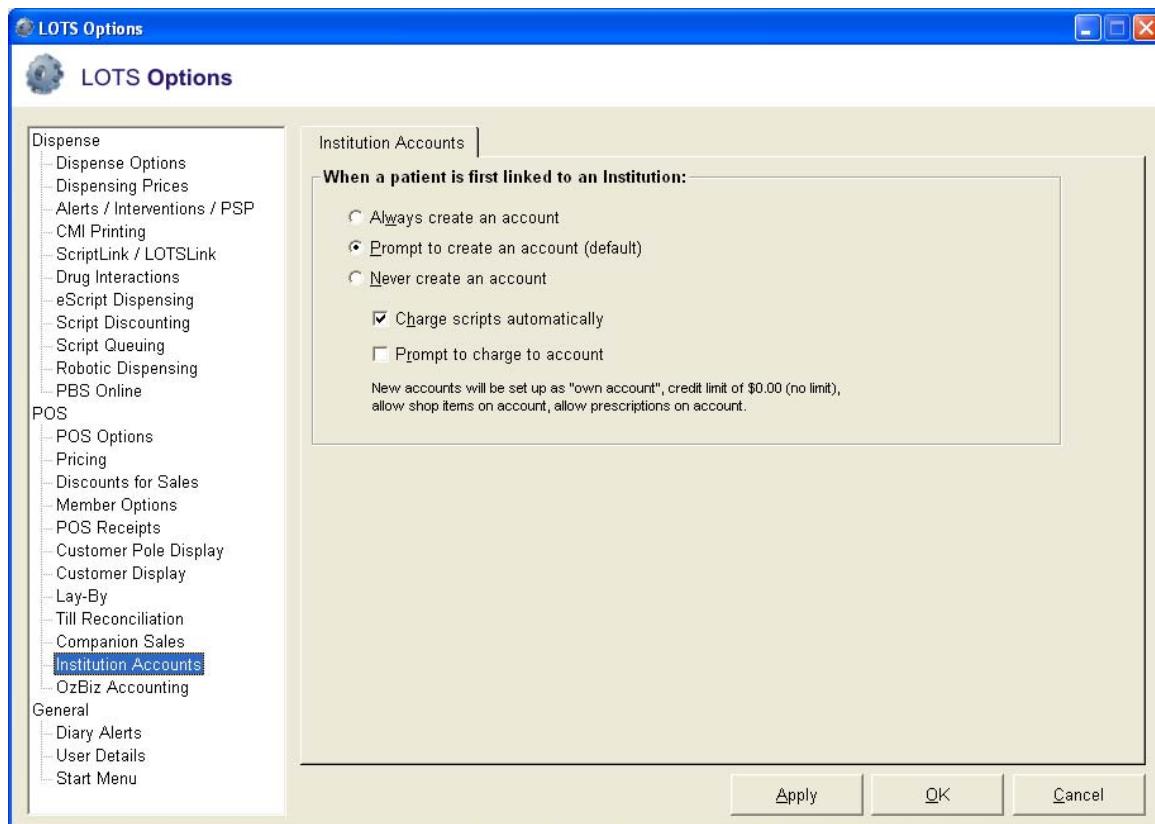


Figure 11

Option	Description
Always create an account	Select this option if you want an account to be created automatically as soon as you assign a patient to an institution.
Prompt to create an account (default)	Select this option if you want a prompt to appear asking you if you want to create an account for this patient as soon as you assign a patient to an institution or not.
Never create an account	Select this option if you do not wish for an account to be created for patients who get assigned to an institution.
Charge scripts automatically	Tick this option to charge all scripts automatically to patients that have institution accounts. Will only be active if either of the first two options are selected.
Prompt to charge to an account	If either of the first two options are selected then this option will be active, tick this option to prompt before charging scripts to the patients accounts.

1.12 OzBiz Accounting

The tab 'OzBiz Accounting' allows you to set up OzBiz Accounting options (see Figure 12). The integration of OzBiz with LOTS will allow LOTS customers to use MYOB automatically as their accounting system.

OzBiz is an automated program that will extract daily sales and invoice data from LOTS and import it into the MYOB accounting software.

OzBiz exports two files:

- **Sales** – The sales file contains all of the sales data based on the End Of Day (and Till Reconciliation).
- **Bills** – The bills file contains all supplier invoices and turnover invoices processed during the End Of Day period.

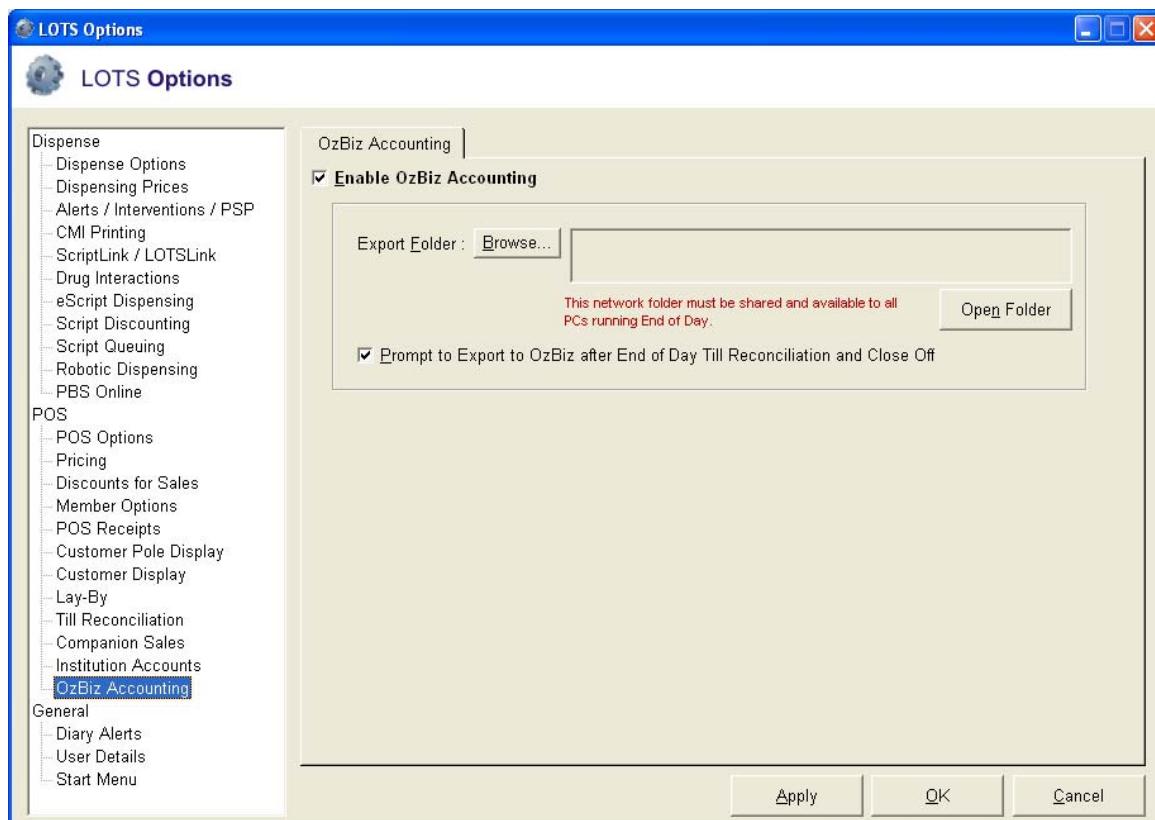


Figure 12

Option	Description
Enable OzBiz Accounting	Ticking this option will turn on OzBiz Accounting. You will also need to contact your local state office to obtain the files required to activate OzBiz Accounting.
Export Folder	Use the ' Browse... ' button to navigate to a networked folder accessible on all computers. This is the location of where the data files are saved to.
Open Folder	The Open Folder button will allow you to open the folder of where the OzBiz files are being saved to, this ensures the correct folder is being selected. This option may also be quite useful if troubleshooting.
Prompt to Export to OzBiz after End of Day Till Reconciliation and Close Off	If you want a prompt to appear asking you to export the files to OzBiz after you perform an End of day Till Reconciliation, then tick this option. Otherwise you can export the files when you like by selecting the 'Export to OzBiz' button on the End of Day screen.

1.13 Diary Alerts

The tab 'Diary Alerts' allows you to turn on the diary module (see Figure 13).

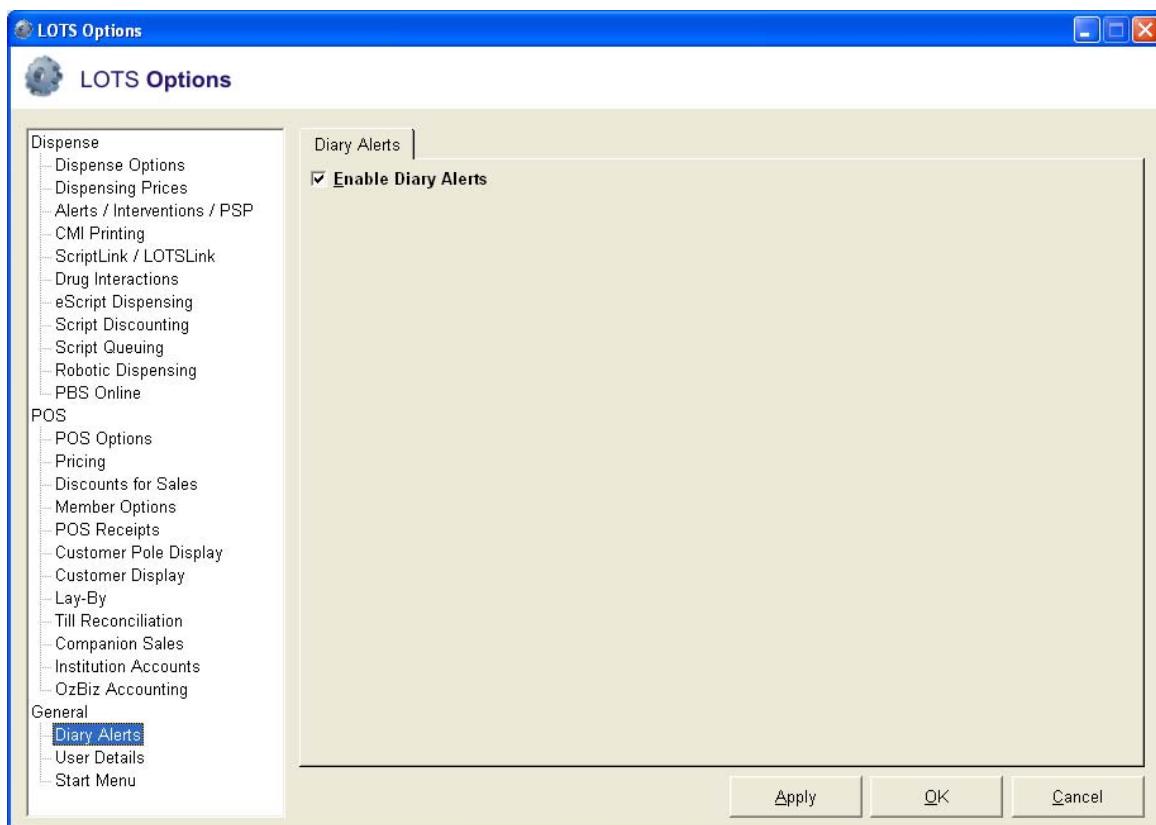


Figure 13

Option	Description
Enable Diary Alerts	Ticking this option will activate Diary Alerts. Refer to section: 5.4 – Diary Function .

1.14 User Details

The section 'User Details' displays all of your business & registration information (see Figure 14). It is very important to check with Corum Support prior to making any changes to this screen. Any unauthorised changes may cause LOTS to become unregistered and stop working.

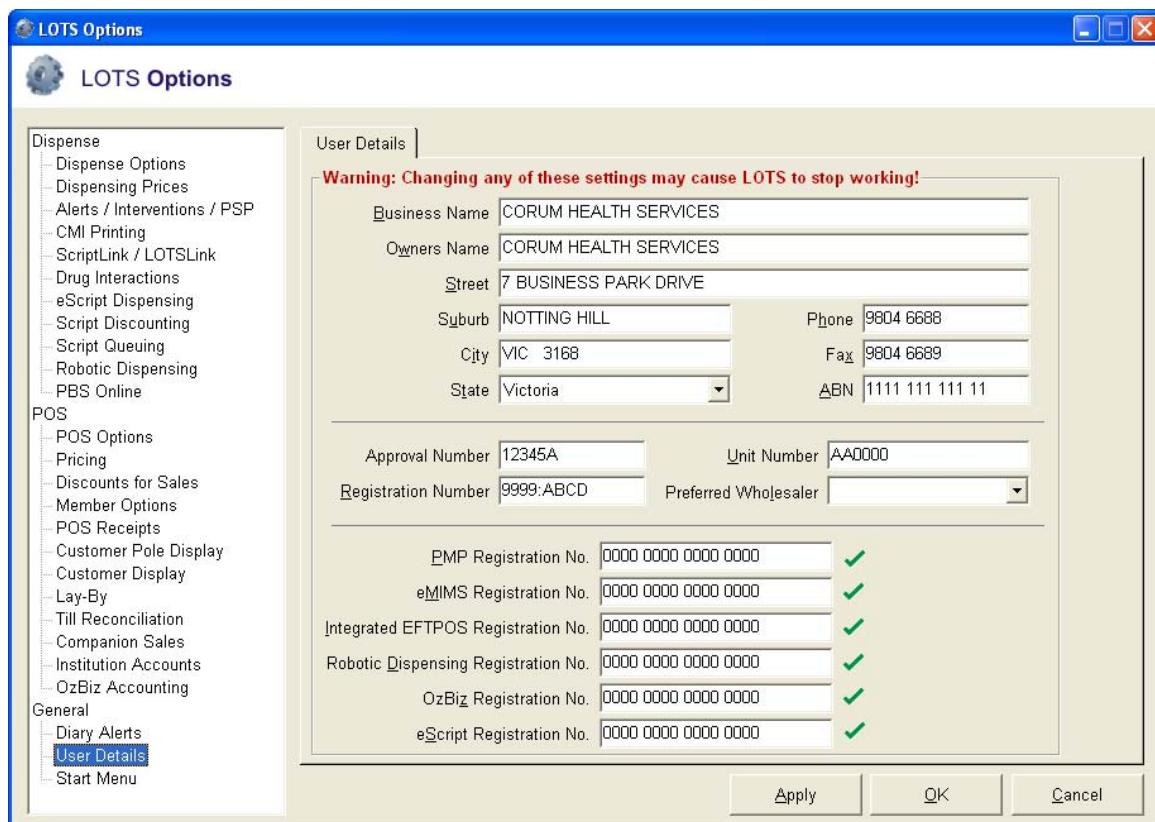


Figure 14

1.15 LOTS Start Menu

The tab 'LOTS Start Menu' allows you to change the setting in relation to how the LOTS Start Menu is displayed (see Figure 15).

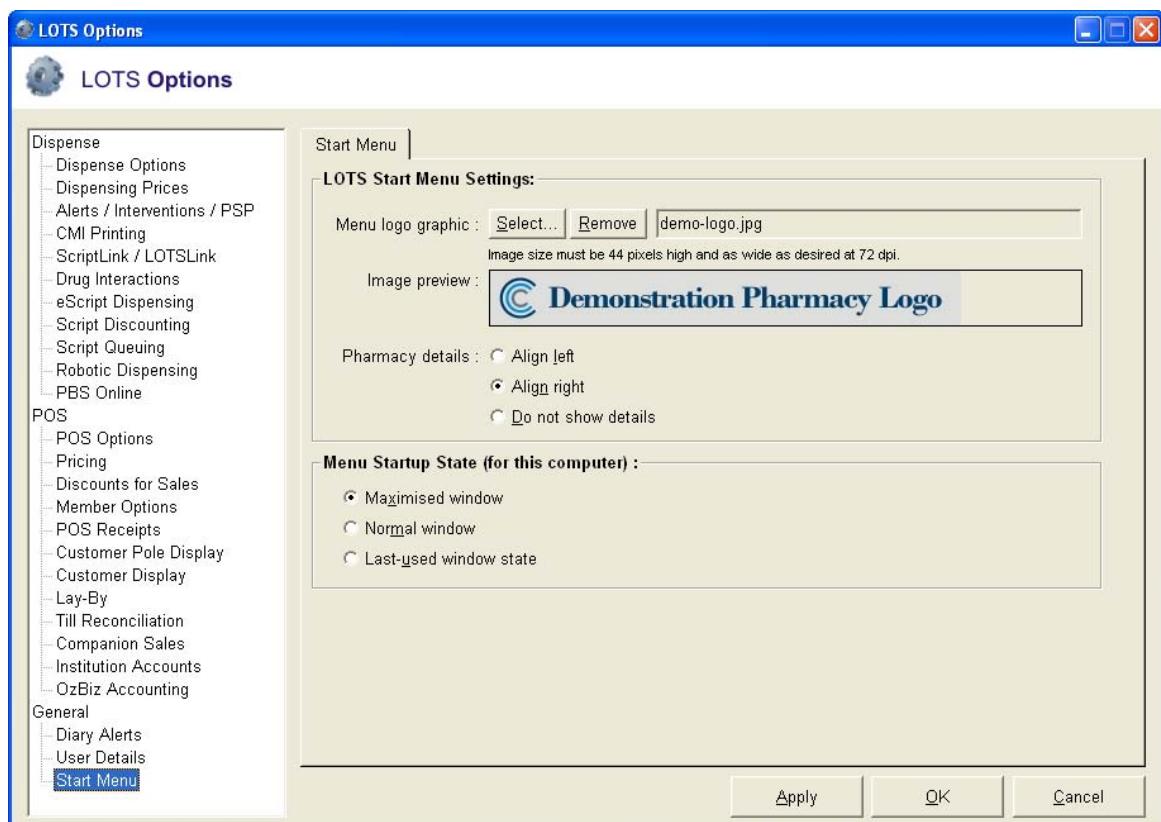


Figure 15

Option	Description
Menu logo graphic	If you wish to add a pharmacy logo to your start page, use the <u>Select...</u> button to search for either a jpeg or bitmap file. For the image to fit properly, it must be 44 pixels high at 72 dpi. To remove a logo simply select the <u>Remove</u> button.
Image preview	A preview of the image you have selected will appear in the image preview display
Pharmacy details	The pharmacy details refer to the pharmacy's name & address and where it is to be displayed. If do not which to show your pharmacy details select <u>Do not show details</u> . Note: If you have added a logo it is advisable to align your pharmacy detail to the right so it doesn't clash with your image.
Menu Startup State (for this computer)	<ul style="list-style-type: none"> • <u>Maximised</u> window – If selected the window will always appear full screen when you begin LOTS. • <u>Normal</u> window – If selected the window will appear the same size as it was when you last started LOTS. • <u>Last-used</u> window state – If selected LOTS will remember the last-state the window was before it was last exited.

2 Sales

LOTS Sales gives authorised access to every day transactions including New Sales, Returns, Price Check, Account payments, Stock Transfers and Lay-Bys.

2.1 New Sale

1. Navigate from the LOTS Start Menu → Sales.
2. To Start a new sale select the 'New Sale' button (as shown in Figure 16).
3. The LOTS New Sale screen will be displayed (as shown in Figure 17).
4. At this point you may now key in any OTC items using one of the following methods:
 - Scanning a product (if a barcode exists) is the most efficient method.
 - Typing the products PLU number into the 'Stock Item' field.
 - Typing in part of the product description in the 'Stock Item' field, press the [Enter] key and select the appropriate product from the list presented.
 - Press an appropriate 'Hot Key' if set up (refer to Hot Keys in the 'Stock Card' section).
 - Searching via a wildcard search.

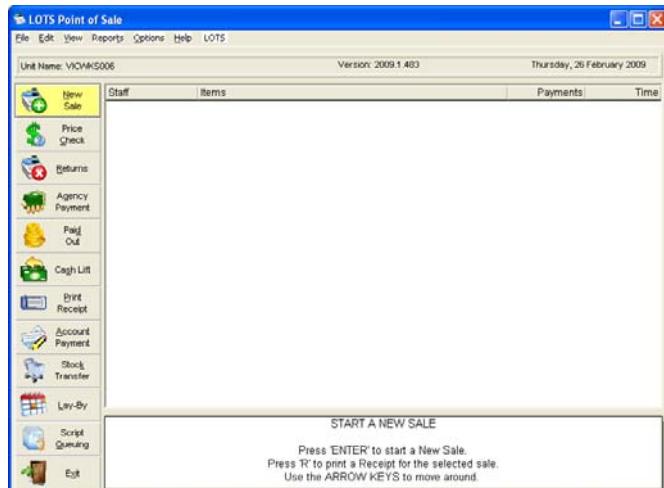


Figure 16

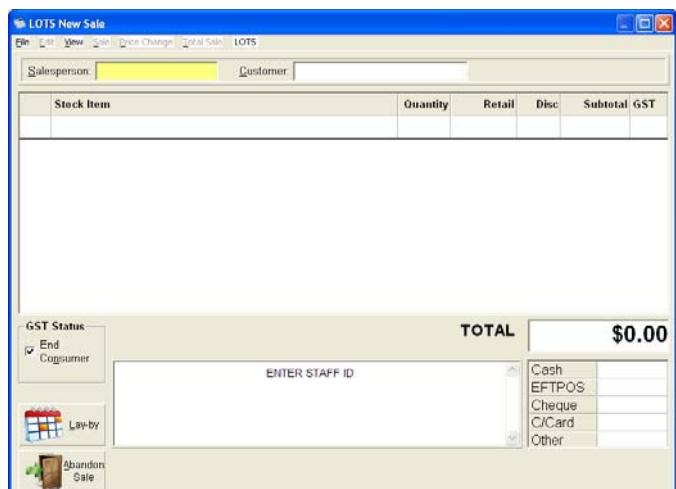


Figure 17

5. The stock item description, quantity (defaults to 1), retail unit price, discount (if applicable), subtotal and GST status will then be displayed (as shown in Figure 18).

Stock Item	Quantity	Retail	Disc	Subtotal	GST
PANADOL CHILD 1-5YR C/F 100ML	1	\$7.75	0	\$7.75	<input type="checkbox"/>
BABYLOVE NAPPY WALKER 32CT4	1	\$19.05	0	\$19.05	<input checked="" type="checkbox"/>

Figure 18

Note: For finishing a sales refer to section **2.1.4– Finishing A Sale**.

2.1.1 Unlisted Item

In an instance where a product cannot be located with the LOTS Sales and you need to sell it, then by pressing F2 you can sell the item as an 'Unlisted Item'. This allows you to manually enter in a product and its retail unit price.

1. To sell an unlisted item press F2 when performing a new sale.
2. You will be able to type anything into the stock item field without the 'Stock Search' window appearing. Also the unlisted item icon will appear to the right of the product you have entered (see Figure 19).

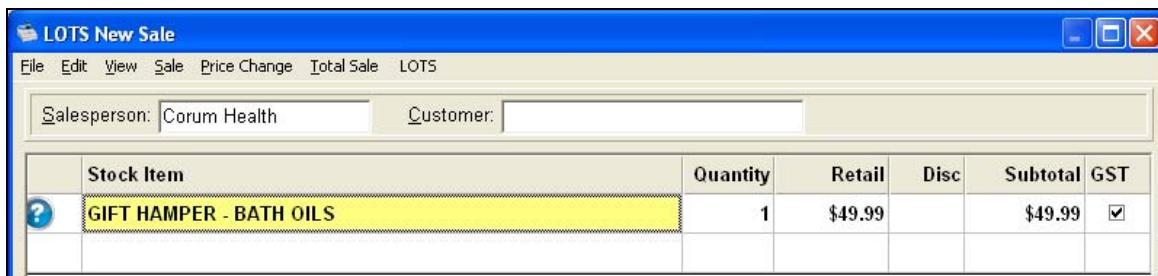


Figure 19

3. The Quantity field will default to '1' and you will need to enter in the retail price, as soon as you tab past the 'Retail' price field you will be prompted with the 'GST Rate' window (see Figure 20).
4. The 'GST Rate' drop-down list will default to 10% but this can be changed to 0%. If you select 10% the GST tick box will be ticked, if you select 0% the GST tick box will not be ticked.

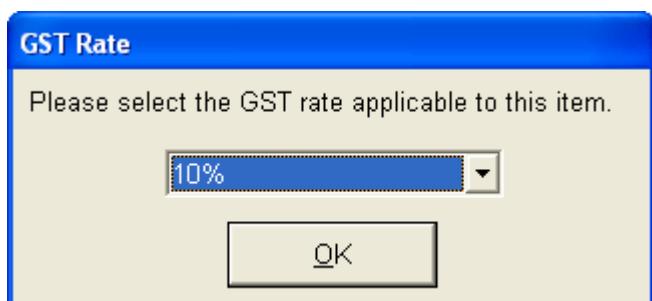


Figure 20

Note: Once you complete the sale it is recommended that you navigate to LOTS Stock Cards and add the unlisted item. This way the next time that you need to sell the item you can simply scan it in or select it from the 'Stock Search' window.
To add a new stock card refer to section: **3.10 Creating A Stock Card**.

2.1.2 Discounts

A discount may only be applied to products that have the 'Allow Discount' checkbox ticked in the products stock card. If this is the case a discount may be applied to all by using the function keys (F4 – Standard Discount, F5 – Special Discount) or simply by typing in the desired discount in the 'Disc' field (as shown in Figure 21).

Note: Discounts will not be applied to prescriptions unless turned on in LOTS Options, refer to section: **1.3 – Discounts For Sales**.

1. A dollar \$ discount may be applied instead of a % discount. Simply type in the \$ sign and the amount you wish to discount into the 'Disc' field (as shown in Figure 21).

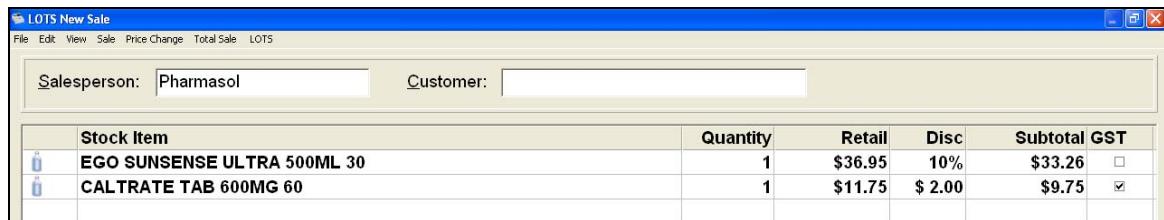


Figure 21

2. **F3** – Is a 'Variable Discount' that allows you to enter the desired amount you wish to discount the sale by (see Figure 22). This applies to all discountable items on the sale.
3. **F4 & F5** – Are 'Standard Discounts' that when pressed within a sale will automatically apply to all items that can be discounted.



Figure 22

Note: The F4 & F5 automatic discounts are setup via LOTS Start Menu → Tools → Options → Discounts for Sales (as shown in Figure 23).



2.1.3 Changes To Quantity, Retail & GST

Prior to finishing a sale it is possible to change the 'Quantity' to be sold, 'Retail' price or the 'GST' status if necessary.

1. The simplest method is to use the directional arrow keys ($\leftarrow \uparrow \rightarrow \downarrow$) to move the cursor to the field you wish to change and make the desired modification (see Figure 24), then press **Enter**.

Quantity	Retail	Disc	Subtotal	GST
1	\$11.95	10%	\$10.76	<input checked="" type="checkbox"/>
1	\$12.85	\$2.00	\$10.85	<input checked="" type="checkbox"/>

Figure 24

Note: If you change the retail price in the middle of a sale, it will only be a temporary price change as the retail price will remain unchanged in the product's stock card.

2. To permanently change the retail price of a stock card in the New Sale screen, select the product, modify the price and then select the Price Change drop down menu → Change Price On Stock Card (as shown in Figure 25).
The shortcut for this option is **Ctrl+P**.

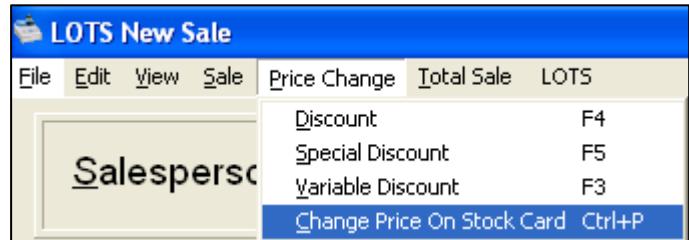


Figure 25

3. A confirmation message will display asking you to confirm your permanent price change select 'Yes' to apply the change. This price will be changed on the stock card once the sale is finished.
4. GST is automatically added to all POS products (according to the settings on the stock card), though you can remove the GST by unticking the GST tick box.

Note: Australian law clearly states that all PBS scripts cannot be charged GST.

2.1.4 Finishing A Sale

- Once all products have been scanned into the sale, the transaction may then be completed simply by pressing the + key located on the right hand side of the keyboard.(as shown in Figure 26)

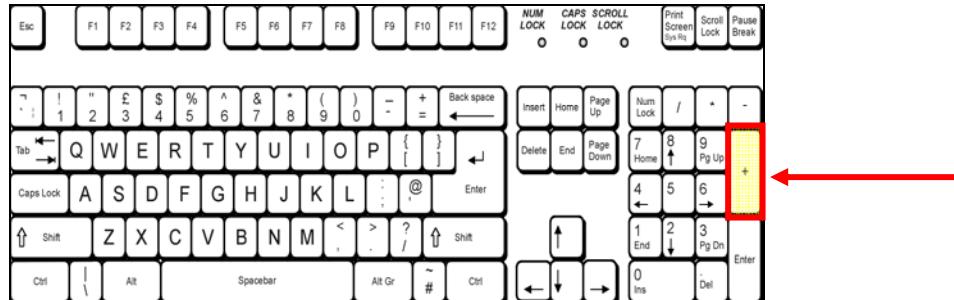


Figure 26

- At this point the sale will be transferred into the 'Cash' field.

- Key the amount of cash tendered into the 'Cash' field or arrow down to the payment method(s) you require (see Figure 27).

The five different payment fields are:

- Cash** – Enter in the cash amount received.
- EFTPOS** – Enter in the EFTPOS payment (for LOTS Integrated EFTPOS/Credit Card refer to section: **2.1.6 – LOTS Integrated EFTPOS/Credit Card**).
- Cheque** – Enter in the cheque amount received.
- C/Card** – Enter in the Credit Card payment (for LOTS Integrated EFTPOS/Credit Card refer to section: **2.1.6 – LOTS Integrated EFTPOS/Credit Card**).
- Other** – Use this field for all other payments (e.g. - bank transfer, voucher etc).

\$18.30	
Cash	50.00
EFTPOS	
Cheque	
C/Card	
Other	

Figure 27

Note: You can also process a sale using 2 (or more) methods of payment. Select the first method of payment and type in the amount applying to that field, then; simply use the arrow keys to transfer the rest of the payment to another field. Press the plus (+) key to finalise the Sale.

- After entering the desired amount in the field press the + key a second time to display the change required.

- LOTS will open the cash draw and print a sales docket, simultaneously.

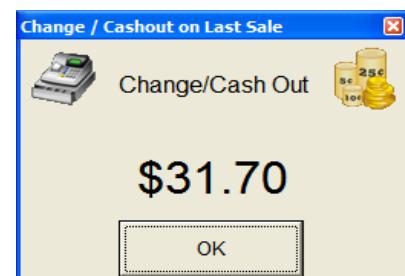


Figure 28

- Select the **OK** button to continue (as shown in Figure 28).

- Alternately, if the cash tendered is the exact amount, simply press the F12 key to ring off the sale to cash in one step.

2.1.5 Finishing A Sale – Cash Out

1. To apply 'Cash Out' to an EFTPOS sale, manually add the desired amount onto the sales total. For example if the customer wanted \$50 cash out and the sales total was \$18.30 simply type in the total of the two - \$68.30 (as shown in Figure 29).

\$18.30	
Cash	
EFTPOS	68.30
Cheque	
C/Card	
Other	

Figure 29

2. Press the plus (+) key for the second time to display the Cash Out required. Click the 'Ok' button to continue (see Figure 30).

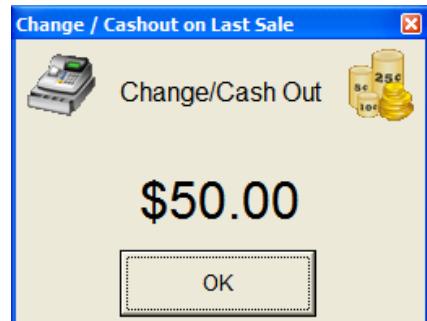


Figure 30

2.1.6 LOTS Integrated EFTPOS/Credit Card

1. If you have integrated EFTPOS setup (in LOTS Options) the Sales payment section will look slightly different, as both the EFTPOS and C/Card field will be combined (see Figure 31).
2. Process the payment as usually by entering all the payment tender types into the appropriate fields.

Note: As there are many different types of integrated EFTPOS/Credit Card systems that can be used in conjunction with LOTS, for finalising the payment using EFTPOS/Credit Card you will need to follow the instructions as set out by your integrated EFTPOS/Credit Card supplier.

\$18.30	
Cash	
EFT/CC	\$18.30
Cheque	
Other	

Figure 31

2.1.7 Function Keys Within Sales

To improve the time it takes to perform a sale in LOTS, common sales tasks can be carried out by pressing the appropriate function key.

- **F2** – In the instance where a product cannot be located (unlisted item) within the LOTS program and you need to sell it, then F2 may be used at the Point of Sale. This allows you to manually key in a description for the product within the ‘Stock Item’ field and the retail unit price. You will also be prompted to select the rate of GST applicable to the item (as shown in Figure 32), this will be either 10% or 0% and can be selected from the drop down menu.

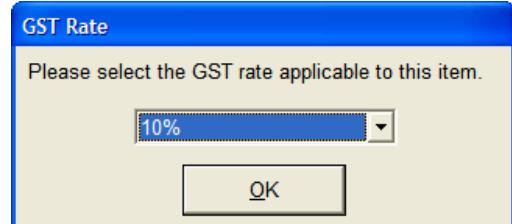


Figure 32

Note: The description typed in for the product will be printed on the customer's receipt and will also be shown on the End of Day report.

- **F3** – Is a ‘Variable Discount’ that allows you to enter the desired amount you wish to discount the sale by (see Figure 33). This applies to all discountable items on the sale.
- **F4 & F5** – Are ‘Standard Discounts’ that when pressed within a sale will automatically apply to all items that can be discounted.



Figure 33

Note: The F4 & F5 automatic discounts are setup via LOTS Start Menu → Tools → Options → Discounts for Sales (as shown in Figure 34)



Figure 34

- **F6** – If you want a sale to be charged to a specific customer's account simply press F6 to initially identify the account customer by name.
- **F7** – Can be pressed to place the sale straight on the customers account, rather than pressing the plus (+) key to finish the sale.
- **F8** – You can process payments using F8 for Credit Card.
- **F9** – You can process payments using F9 for Cheque.
- **F11** – You can process payments using F11 for EFTPOS
- **F12** – You can process payments using F12 for Cash payments,

2.2 ScriptLink

ScriptLink is a facility whereby you can collect prescriptions that have been dispensed on LOTS Dispense (or other dispensing systems) at the till using LOTS POS. The prescriptions will come in the sales screen.

Stock usage and re-ordering is handled transparently in the background, and automatic charging to selected debtors is also available.

These options may vary depending on whether you are running LOTS POS only or LOTS Complete.

- **LOTS POS** – LOTS POS means you are connected to different dispensary software via ScriptLink. Use the asterix (*) to search by surname.
- **LOTS Complete** – LOTS Complete give you a few more options:
 - Allows you to scan in the dispensary barcode.
 - Allows you to search by script number.
 - Allows you to use the asterix (*) to search by surname.

2.2.1 ScriptLink – LOTS POS

How to enter a Script at the till:

1. Navigate from the LOTS Start Menu → Sales.
2. To start a new sale, select the 'New Sale' button.
3. At this point you may now key in any script items by pressing the '*' key to display the 'Scriptlink' window. Once open type in the surname (or part of the surname) of the customer whose script you wish to display (as shown in Figure 35).

Note: Entering nothing will display all waiting scripts.

4. Once you have entered in the patient name, select 'OK'. This will display the 'Search for Person' (see Figure 36) window, highlight the patient and select 'OK'.
5. The scripts will display within the 'New Sale' screen (as shown in Figure 37).

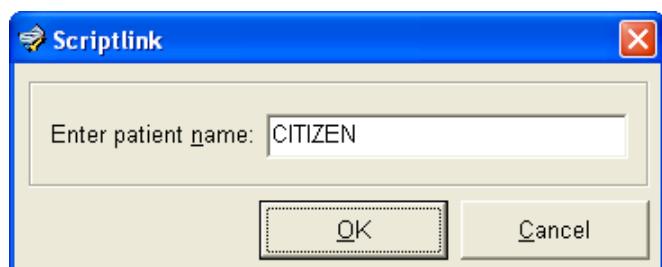


Figure 35

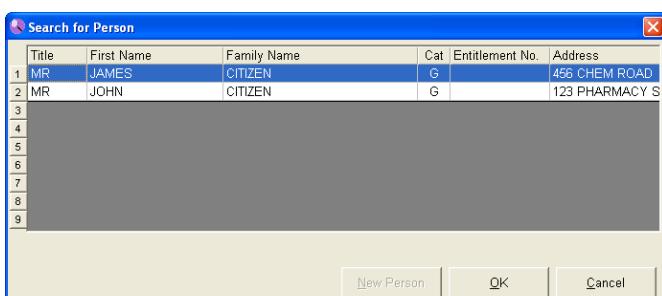


Figure 36

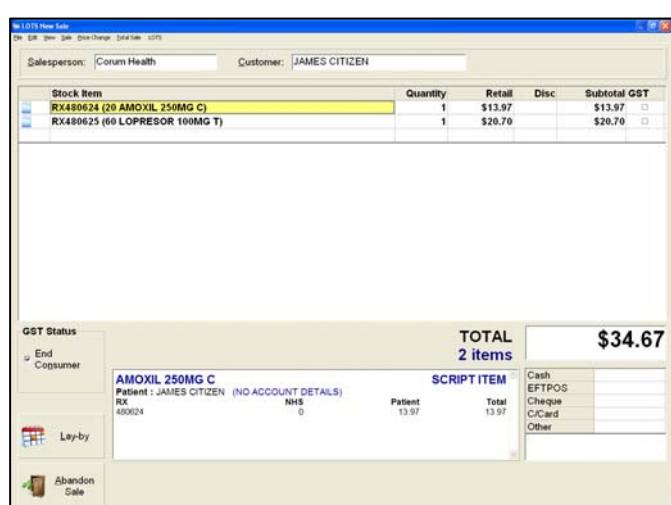


Figure 37

2.2.2 ScriptLink – LOTS Complete

How to enter a Script at the till:

1. Navigate from the LOTS Start Menu → Sales.
2. To start a new sale, select the 'New Sale' button.
3. At this point you may now either:
 - Key in any script items by pressing the '*' key to display the 'Scriptlink' window (Figure 38).
 - Enter in 'RX' followed by the script number into the stock item field (see Figure 39).
 - Scan the dispensary barcode

Note: There is 1 barcode allocated for each batch of scripts per customer. If you wish to sell scripts to multiple customers within 1 sale, you must scan the barcodes for each patient.

6. The scripts will display within the 'New Sale' screen (as shown in Figure 40).

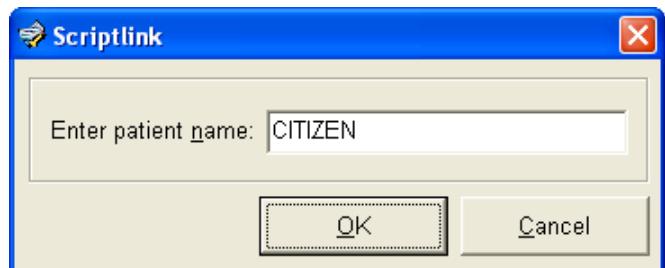


Figure 38

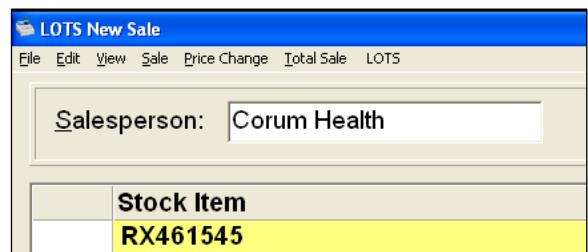


Figure 39

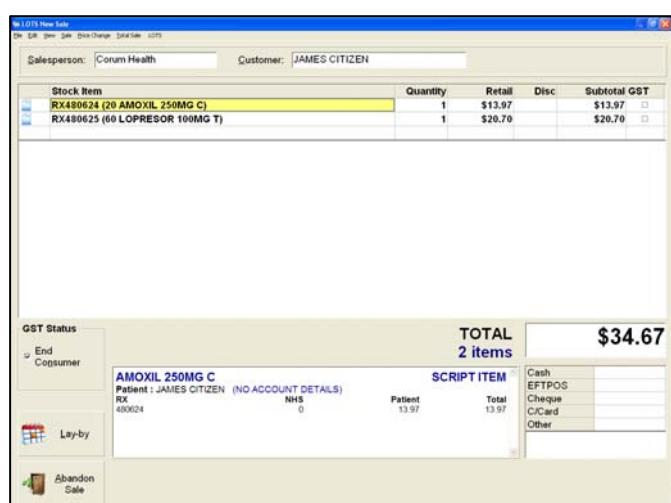


Figure 40

2.3 Placing A Sale On Hold & Abandon Sales

1. When in the LOTS New Sale screen you can place a sale on hold by selecting the 'Abandon Sale' button (as shown in Figure 41).
2. Alternatively, you can press the [**Esc**] key located at the top left hand corner of the keyboard.
3. You will be prompted to put the sale on hold, select the 'Yes' button to continue (select 'No' to abandon).



Figure 41

- Note:** When a sale is placed on hold it will be displayed in blue in the 'LOTS Point of Sale' screen. A sale placed on hold is available on all LOTS computers.
4. If you select the 'No' button when this question is displayed, the sale will be Abandoned. Abandoned transactions are displayed in red text in the LOTS 'Point of Sale' screen.

2.3.1 Retrieving A Sale On Hold

To retrieve the sale that is on hold, select (double click) the specific transaction that is listed in the LOTS ‘Point of Sale’ screen (displayed in blue text - Figure 42) and finish the sale as normal.

Staff	Items	Payments	Time
Corum Health	BEROCCA ORIG EFF T 15	On Hold	10:23 AM
Corum Health	BEROCCA ORIG EFF T 15	Abandoned	10:22 AM
Corum Health	BEROCCA ORIG EFF T 15	Abandoned	10:16 AM

Figure 42

If a sale is ‘On Hold’ and you do not wish it to be on hold you must bring the sale up and abandon it (refer to section: **2.3 – Placing A Sale On Hold & Abandon Sales**).

Note: You can quickly identify sales on hold by selecting the View drop-down menu → Sales On Hold.

2.4 Price Checks

1. To check a price of a product, simply select the 'Price Check' option from the LOTS 'Point of Sale' screen (as shown in Figure 43).

Note: A price check window can also be accessed by pressing Ctrl+C in any Sales window.

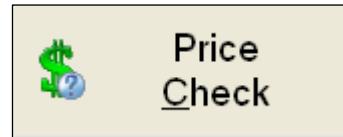


Figure 43

2. Simply scan the barcode of the item (or search by the product's name or PLU) when prompted and select the 'OK'.
3. The items Price, Stock on hand and GST status will be displayed (as shown in Figure 44).
4. Click the 'OK' button to clear the price check when finished.

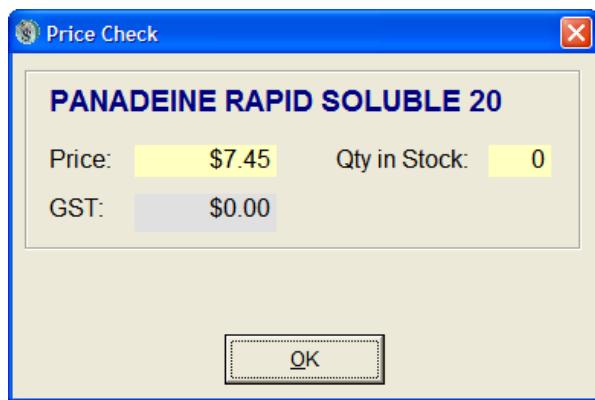


Figure 44

2.5 Returns

1. To return an item, select the 'Return' option from the LOTS 'Point of Sale' screen (as shown in Figure 45).
2. This will take you to the 'Return of stock' screen. You will be prompted to enter the transaction date or the receipt invoice number that needs to be entered before you can proceed.
3. Key/Scan in the product(s) into the 'Stock Item' field (as you would for a new sale).
4. The Quantity, Retail and Total values will be negative to display a return of stock and a refund of money (as shown in Figure 46).
5. To finish the return press the Plus (+) key, choose the refund tender type then press **Enter** to open the cash drawer.



Figure 45

Stock Item	Quantity	Retail	Disc	Subtotal	GST
EGO AQIUM GEL 1 LITRE	-1	\$18.30	0	-\$18.30	<input checked="" type="checkbox"/>
PANADOL CAPLETS 20 RAPID	-1	\$4.95	0	-\$4.95	<input type="checkbox"/>

TOTAL **-\$23.25**

GST Status
 End Consumer

TO LOOK UP AN ITEM:
 Enter the BARCODE, PLU or description of the item,
 or type in 'RX' followed by the script number.
 TO TOTAL THE SALE PRESS '+'

Cash
 EFTPOS
 Cheque
 C/Card
 Other

Abandon Sale

Figure 46

2.6 Exchanges

The LOTS Sales module can also easily handle exchanges

1. To exchange an item in LOTS, simply navigate to the 'New Sale' screen.
2. Enter in the product(s) you wish to return (and if necessary) the product(s) you wish to purchase.
3. For each product they wish to return enter in a negative quantity into the Quantity column (see Figure 47).
4. Tender the sale as normal by pressing the Plus (+) key.
5. LOTS will notify you if the customer owes you money or if they are still in credit.

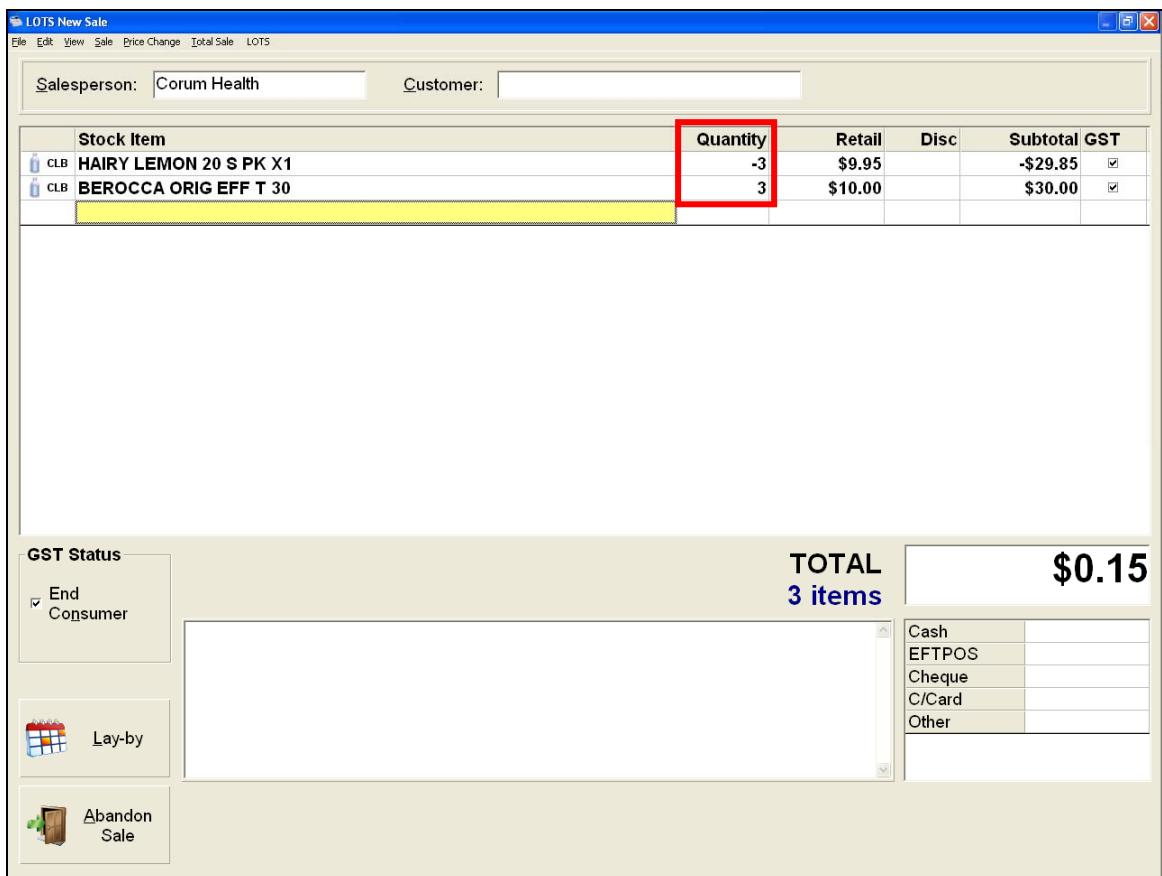


Figure 47

2.7 Agency Payment

The Agency Payment module is used when you need to take payments on behalf of a third party (Business/Charity).

1. Select the 'Agency Payment' option from the LOTS 'Point of Sale' screen (as shown in Figure 48).



Figure 48

2. The 'Agency Payment' screen will appear (as shown in Figure 49).

3. Enter the following:

- **Salesperson** – This is your staff ID.
- **Agency** – Select the agency (from the drop-down list) to add the payment to.
- **Payment Amount** – Enter in the payment received, followed by the appropriate tender type.

Note: All three above fields are required.

4. To complete the transaction, as with a new sale, press the plus (+) key or alternatively select the 'OK' button.

Note: The Agency Payment functionality keeps the money separate from the cash takings section on your End Of Day (EOD) report. There is a separate section in your EOD report where you can easily see your agency payment transactions.

If you are using the Agency Payment facility ensure this option is enabled in EOD Options so they are displayed on the EOD report.

A screenshot of the 'Agency Payment' dialog box. The window has a blue title bar with the title 'Agency Payment'. Below the title bar is a toolbar with a close button (X). The main area is titled 'Options'. It contains three input fields: 'Salesperson' (a yellow text field), 'Agency' (a dropdown menu with an 'Edit' button), and 'Payment Amount' (a text field). Below these fields is a table with five rows, each containing a tender type: 'Cash', 'EFTPOS', 'Cheque', 'C/Card', and 'Other'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Figure 49

2.7.1 Add An Agency

1. To add an Agency, select the 'Edit' button (as shown in Figure 50).

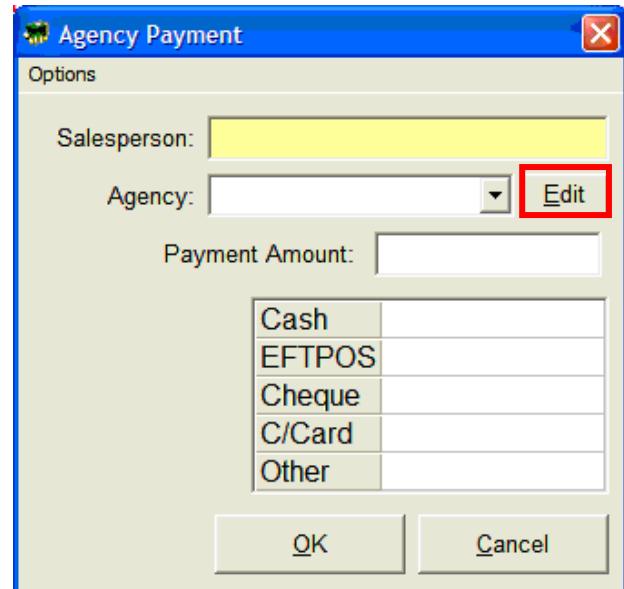


Figure 50

2. From the 'Agencies' screen, select 'Add' (Figure 51).

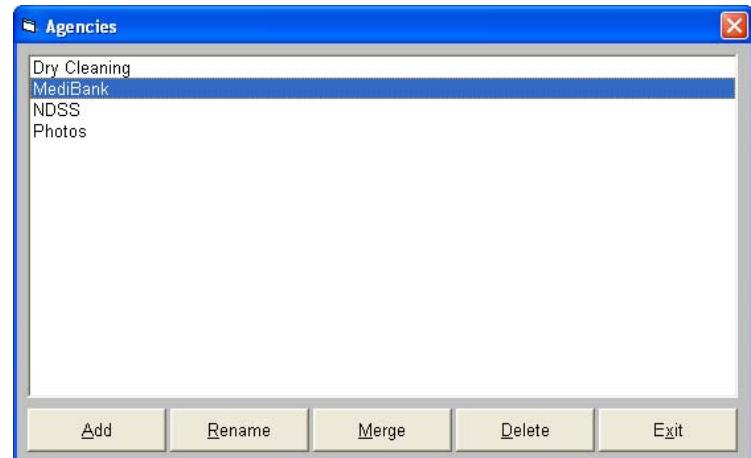


Figure 51

3. Enter the name for the new agency (as shown in Figure 52).

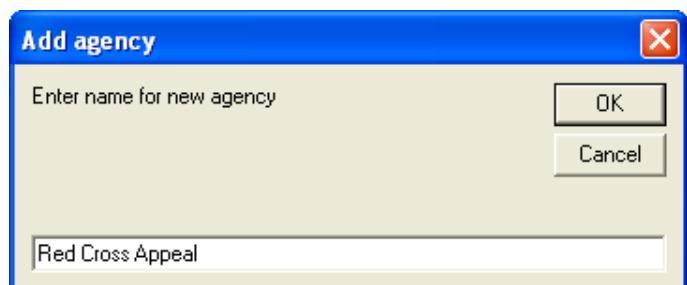


Figure 52

2.7.2 Rename An Agency

1. To rename an Agency, select the 'Edit' button (as shown in Figure 53).

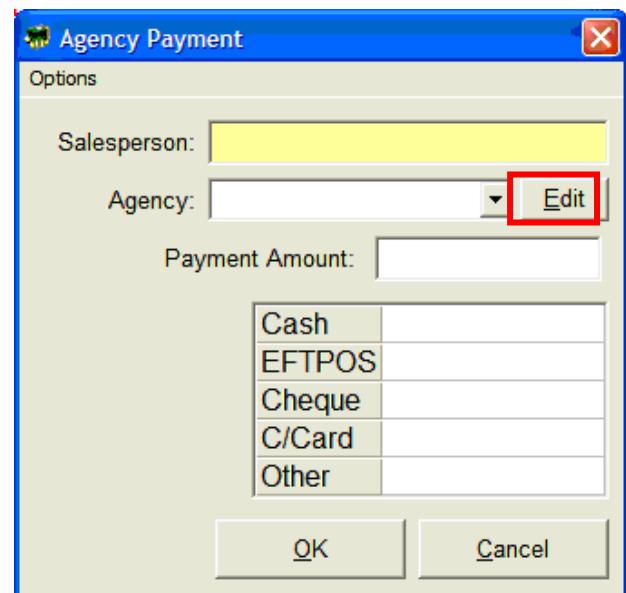


Figure 53

2. From the 'Agencies' screen, highlight the agency you wish to rename and select 'Rename' (Figure 54).

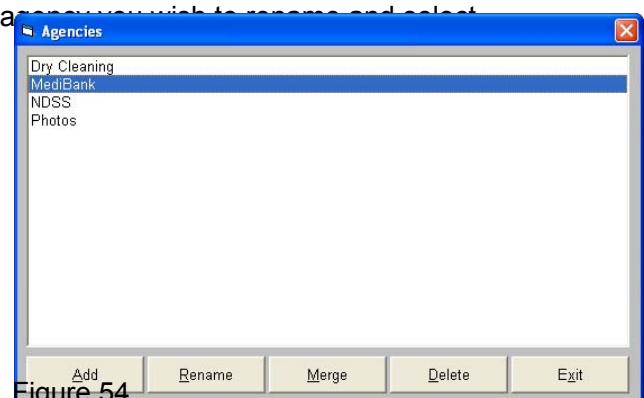


Figure 54

3. Enter the new name for the agency (as shown in Figure 55).



Figure 55

2.7.3 Merge An Agency

1. To merge an Agency, select the 'Edit' button (as shown in Figure 56).

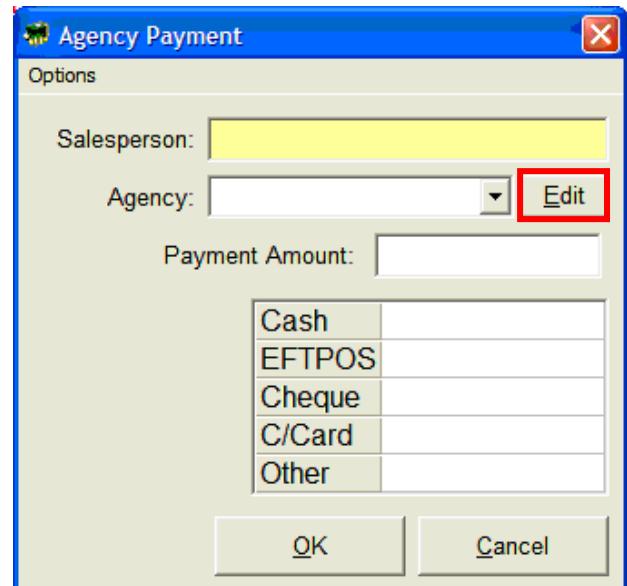


Figure 56

2. From the 'Agencies' screen, highlight the Agency you wish to merge, then while holding down the Ctrl key click on the agency you wish to retain (as shown in Figure 57).
3. Select Merge.



Figure 57

2.7.4 Delete An Agency

1. To delete an Agency, select the 'Edit' button (as shown in Figure 58).

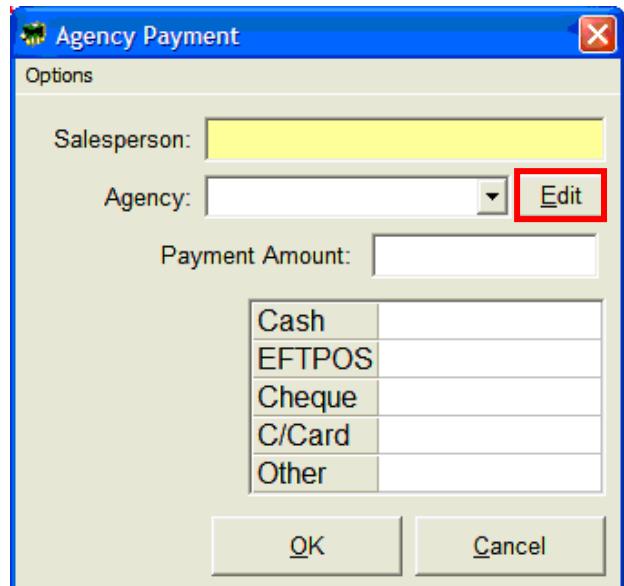


Figure 58

2. From the 'Agencies' screen, highlight the agency you wish to delete (Figure 59).

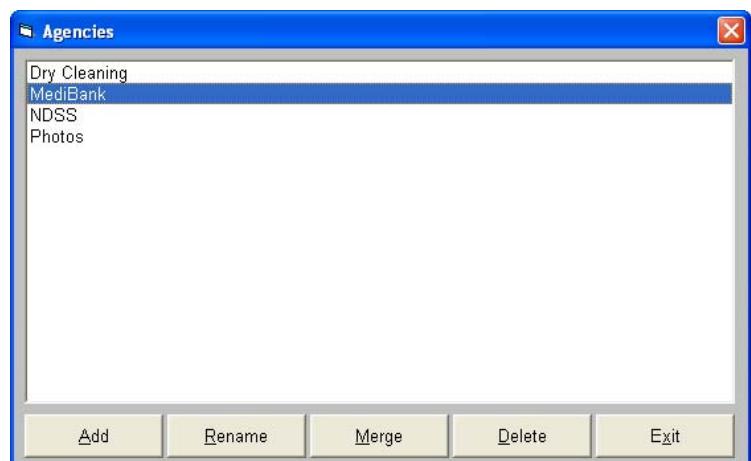


Figure 59

2.8 Paid Out

The Paid Out module is to be used for instances where cash is to be taken out of the cash drawer for minor purchases (e.g. – to top up petty cash)

1. To record pay-outs select the ‘Paid Out’ option from the LOTS ‘Point of Sale’ screen (as shown in Figure 60)
2. The ‘Paid Out’ screen will appear (Figure 61), enter the:
 - **Salesperson** – This is your saff ID.
 - **Description** – Enter in a description of what the payment is for
 - **Amount** – Enter in the amount.

Note: All three above fields are required.

3. To complete the transaction select the ‘OK’ button to open cash drawer and print a receipt.

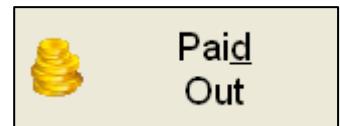


Figure 60

A screenshot of a Windows-style dialog box titled "Paid Out". It contains three input fields: "Salesperson" with the value "Pharmasol", "Description" with the value "Milk and Coffee", and "Amount" with the value "7.95". At the bottom are two buttons: "OK" and "Cancel".

Figure 61

2.9 Printing Additional Receipts

1. If you wish to reprint a receipt for a previous transaction, select the relevant transaction from the list in the LOTS 'Point of Sale' screen.
2. Once you have selected the transaction (by highlighting it), either select the 'Print Receipt' option (as shown in Figure 62) or press the 'R' key.
3. Alternately you can double-click on a sale from the list of 'today's sales' to see a preview of the docket on the screen without printing. You then have the option to print if desired by clicking the printer icon.



Figure 62

Note: You can print out a receipt that was processed on a previous day. To do this navigate to the LOTS 'Point of Sale' screen → View drop-down menu → Display Other Days Sales → keying in the appropriate date (dd/mm/yy) of the sales that you wish to view and selecting the 'OK' button.

2.10 Account Sales

The Account Sales option allows you to add a sale to a customer's account by a single key stroke.

- To place a sale on a customers account simply enter in the sale items then press **F6**. Pressing **F6** will take the cursor to the 'Customer' field located at the top of the screen (see Figure 63). Enter the account customer's name and press **Enter**.

- The 'Search for Person' screen will appear, select the correct customer from the search list (as shown in Figure 64), and press the 'OK' button to continue.

Note: If the customer is not listed you can add them by selecting 'New Person'. For more information on how to add a new person refer to section **8.1 – Creating A Customer In The LOTS Database**.

Note: Primary account customers are displayed in dark blue text and linked account customers are displayed in light blue text.

- To finish the sale and charge it to the customers account, select the plus (+) key.
- A prompt will appear asking you to confirm if you wish to charge the sale to the account (see Figure 65).
- If you select 'Yes', the 'Customer Account' screen will appear. This will prompt you to confirm whether the sale should be charged to the allocated customers account. This will also display the customer's current account balance (as shown in Figure 66).

Note: Pressing **F7** will bypass the 'Account sale?' screen, taking you directly to the 'Customer Account' window (Figure 66).

- Select the 'OK' button to complete the sale. If you have the option 'Additional Receipt On Account Transaction' ticked, two receipts will be printed, one for the customer and one for your records.

Note: To turn the additional receipt on (or off) navigate to the LOTS Point of Sale screen → Options drop-down menu → Receipts After Sale → Additional Receipt On Account Transaction.

Customer: Citizen

Figure 63

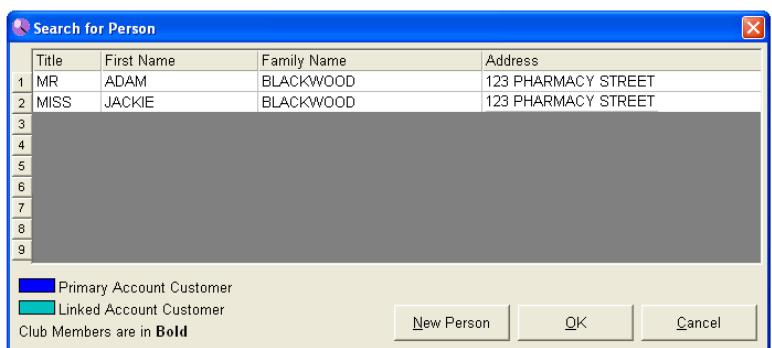


Figure 64

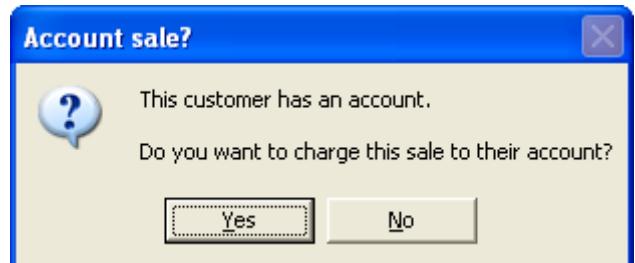


Figure 65

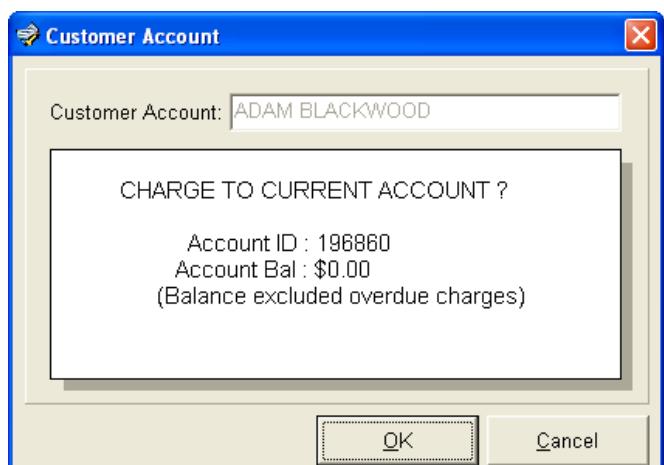


Figure 66

2.11 Account Payments

The Account Payment module allows account customers to make a payment to their account, either partly or in full,

1. Select the 'Account Payment' option on the LOTS 'Point of Sale' screen (as shown in Figure 67).
2. The 'Account Payments' screen will be displayed (as shown in Figure 68).
3. Enter the:
 - **Salesperson** – This is your staff ID.
 - **Customer** – Enter the customer's name and address details such as address and customer number.
 - **Payment amount** – Enter in the amount the customer wishes to pay, then fill in the appropriate tender type(s).

Note: All three above fields are required.

3. You will notice that after you have entered in the payment amount the customer new balance will be shown in the 'Balance after payment' field (see Figure 69).
4. To complete the transaction, specify what form of payment (i.e. cash, credit, etc) as you would for a normal sale and then select 'OK'. If you have the option 'Additional Receipt On Account Transaction' ticked, two dockets will print out, one for the customer and one for your records.

Note: To turn the additional receipt on navigate to the LOTS Point of Sale screen → Options drop-down menu → Receipts After Sale → Additional Receipt On Account Transaction.

Note: To find out how to set up an account for a customer refer to the section: **8 – Debtors**.



Figure 67

Account Payments

Options

Salesperson:	Corum Health	Current balance:	\$11.95
Customer:	ADAM BLACKWOOD	Payment amount:	\$10.00
Address:	ADAM BLACKWOOD 123 PHARMACY STREET PHAMVILLE	Cash	\$10.00
		EFTPOS	
		Cheque	
		C/Card	
		Other	

Figure 68

Current balance:	\$11.95
Payment amount:	\$10.00
Cash	\$10.00
EFTPOS	
Cheque	
C/Card	
Other	
Balance after payment:	\$1.95

2.12 Stock Transfers

To transfer stock between pharmacies, select the 'Stock Transfer' option (as shown in Figure 70).

You must create an account for any customer to whom you wish to perform stock transfers, see section **8 – Debtors**.

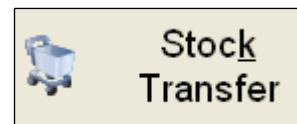


Figure 70

2.12.1 Stock Transfers – Charge Options

Initially you have to set up the Charge Options for the account class that you are transferring to. This has to be set up only once.

To change the settings, in the Stock Transfer screen select the **File** drop down menu → Charge Options (or press **Ctrl+O**). Choose the particular Account Class that you wish to setup and select the price to use when charging (see Figure 71):

- Retail
- List Cost
- Real Cost
- Ave Cost

Other options in this tab allow you to:

- **Include RETAIL on Invoice** – This option will add an extra column to the tax invoice displaying the product's retail price.
- **Exclude from sales figures** – this will not include the stock transfer sales in your sales figures (i.e. – End of Day). However the SOH will be reduced. Stock transfers are itemised separately on the EOD Report.

Furthermore you can add a surcharge onto the price of the items being charged using the 'Surcharge on price' field.

The Ordering Options tab (see Figure 72) will allow you to include (or exclude) expected sales when calculating available stock. This only applies to shop-to-shop transfers via modem where the transfer is performed automatically. Therefore when you process an order from another store via stock transfer if this option is ticked it will take into account your expected sales for the current month. If your:

- Stock on Hand = 12
- Expected Sales = 8
- Request from other store = 10

Then because your expected sales is 8 you will only be able to give the store 4.

This is calculated by: Stock on Hand – Expected Sales ($12 - 8 = 4$).

In this case you have set the percentage of your available stock to be supplied as 50%. So 50% of 12 (12 is your available stock) is 6.

If 'Include expected sales when calculating available stock' is selected then you would subtract your 'Expected Sales' (in this case 8) from your 'Stock on Hand' (12), which would make your available stock 4. 50% of 4 equals 2.

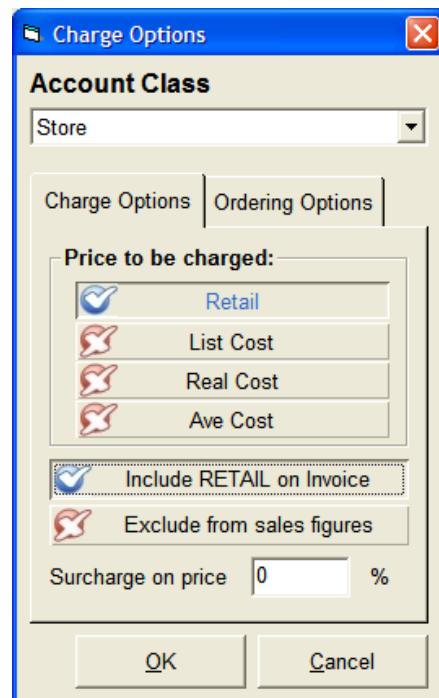


Figure 71

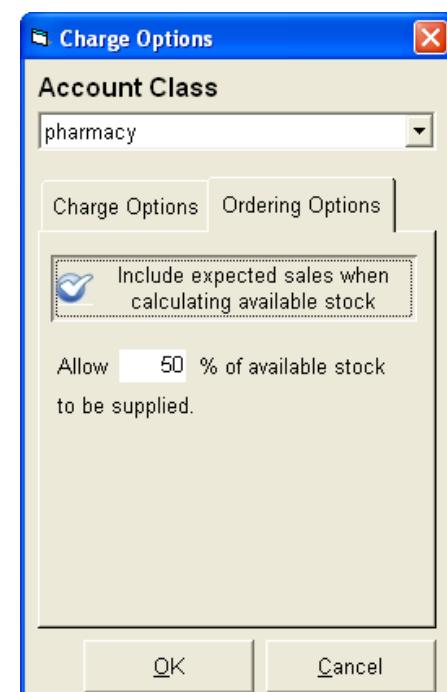


Figure 72

1. Once you have defined your charge options, identify the name of the account customer (this will need to be set up previously in the 'Debtors' module). LOTS will then display details of their address and current balance (see Figure 73).

- You are then required to enter in the stock items to be transferred and their corresponding quantities. Scan or enter in the product you wish to transfer.



Figure 73

- If you enter a quantity that exceeds your current SOH then you will be prompted with the 'INSUFFICIENT STOCK' window (see Figure 74).
- In the 'INSUFFICIENT STOCK' window enter in the quantity of stock you wish to supply and select 'OK'.

Note: If you proceed with a quantity larger than your Stock on Hand, your Stock on Hand will become a negative value.

- The GST column will provide information as to whether a particular product is GST free or not. Any product that carries a GST liability will have a tick placed in the box as shown above (Figure 73).

Note: If the store you are transferring stock to does not have the same ABN as your pharmacy then ensure you tick the 'End Consumer' tick box in the GST status section (see Figure 75).

- To complete the transaction select 'Finish' and an Invoice will print out automatically.

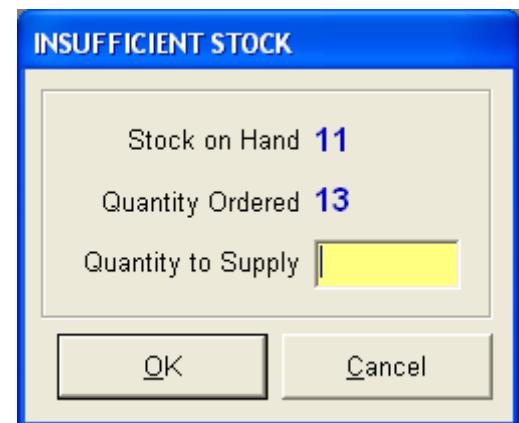


Figure 74



Figure 75

2.12.2 Stock Transfers – Reprint invoice

To reprint a stock transfer invoice simply select the File drop down menu → Reprint Invoice (or press **Ctrl+R**).

This will display the re-print invoice window (see Figure 76). Enter in the invoice number you wish to reprint and select 'OK'.

If you are unsure of the invoice number, refer to transaction lists located in LOTS Point of Sale screen (stock transfers appear in green text).

If you wish to print a stock transfer invoice from a previous date, navigate from the LOTS Point of Sale screen → View → Display Other Days Sales and once again search for the transaction (in green), you can simply select the 'Print Receipt' button (see Figure 77).

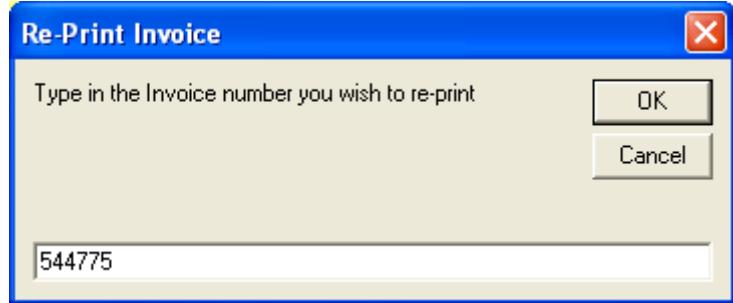


Figure 76



Figure 77

2.12.3 GST Free Stock Transfers

If you wish to create a stock transfer to a sister-store (one that shares the same ABN number as your store), the Stock Transfer module will automatically identify that the ABN numbers match and will display the following prompt (see Figure 78).

Select 'Yes' to make the stock transfer a GST free sale.

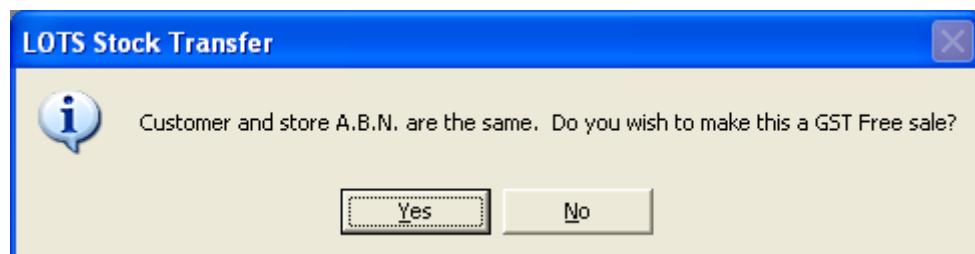


Figure 78

2.13 Lay-By

The Lay-By module in LOTS allows you to accept lay-bys on behalf of customer with pre-defined settings (Refer to section: **1.8 – Lay-By**). Multiple items can be put on lay-by.

Note: Lay-By Terms and Conditions must be defined and provided to the customer by the store.

2.13.1 Creating A Lay-By

1. From the Sales screen, select the 'New Sale' button.
2. From the 'LOTS New Sale' screen, enter the item(s) that you wish to place on Lay-By.
3. Select the Lay-By button (see Figure 79) or **Ctrl+L** from the LOTS Point of Sale screen.
4. Selecting Lay-By will display the 'Lay-By' window (see Figure 80).

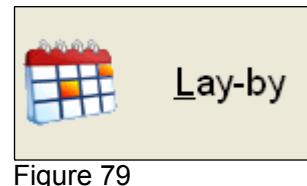


Figure 79

The screenshot shows the 'Lay-By' window with the following details:

Customer: ADAM BLACKWOOD ADAM BLACKWOOD 123 PHARMACY STREET PHAMVILLE	Lay-By No.: <input type="text"/>	Lay-By Status: New Lay-By
	Start Date: 04/09/2008	Sale Total: \$59.00
	Finish Date: 04/12/2008	Less Payments: \$0.00
	Ins or dbl-click to select date	Current Balance: \$59.00

1 stock item purchased on this Lay-By

Stock Item	Date Added	Quantity	Retail	Disc	Subtotal
GIFT SET MINIATURES GIVENCHY	04/09/2008 4:05 PM	1	\$59.00	0%	\$59.00

Remove Selected Item From Lay-By

Payment Schedule for this Lay-By (13 payments remaining): Payment History **Payment Schedule**

Sched. Payment Date	Amount Due
Thu 04/09/2008	\$12.00
Thu 11/09/2008	\$4.00
Thu 18/09/2008	\$4.00
Thu 25/09/2008	\$4.00

Enter Deposit (+)

Lay-By Docket Print Statement Cancel Lay-By Finalise Lay-By OK Cancel

Figure 80

5. You will need to firstly select a customer to assign the Lay-By to. Type the customer name into the 'Customer' field. If the customer does not exist you can create a customer by clicking on the 'New Person' button (see Figure 81).

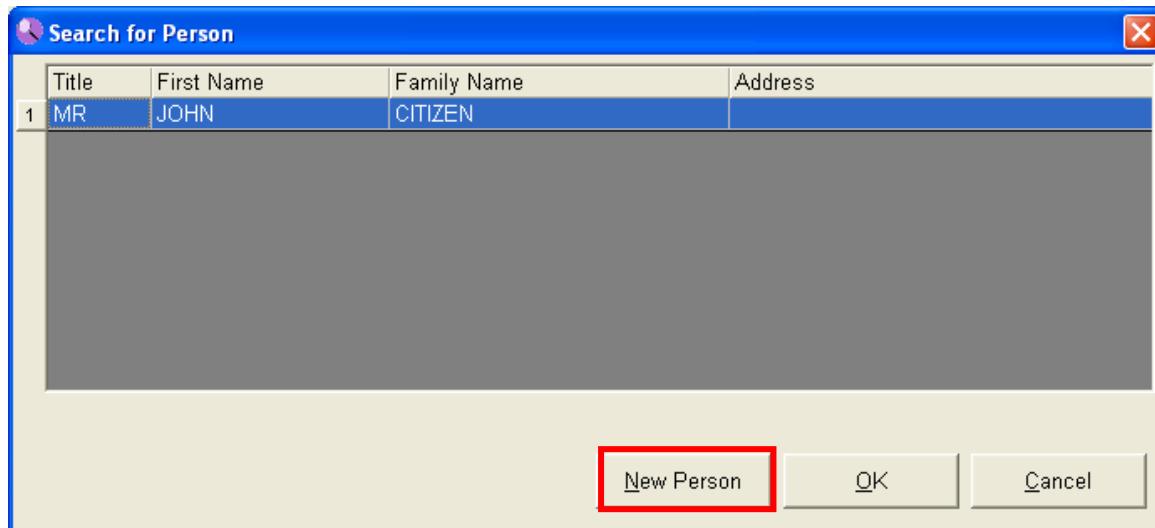


Figure 81

6. The 'Start Date' of the Lay-By will be automatically set to the current day. The 'Finish Date' will default to the Lay-By period previously setup in Lay-By options although can be changed if required.

Note: Double clicking the 'Finish Date' will access a calendar function, allowing you to select another date if applicable.

7. To enter in the initial deposit select 'Enter Deposit (+)' (Figure 80 – previous page), which will display the 'Enter Lay-By Payment' window (see Figure 82).

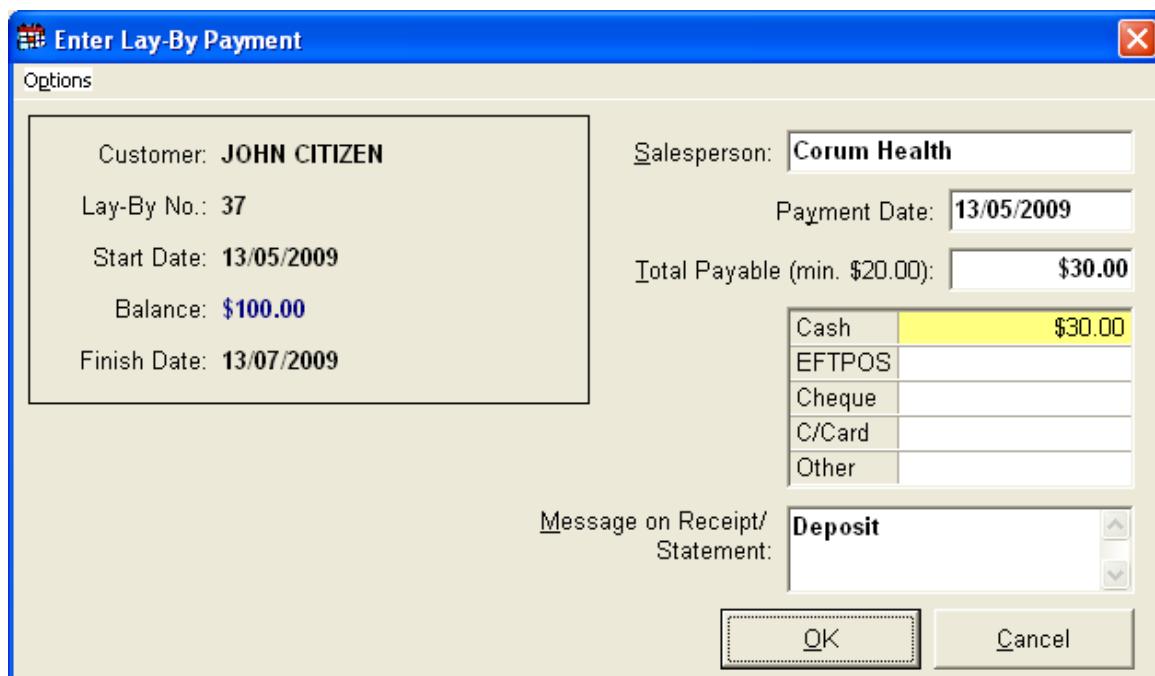


Figure 82

Note: When a deposit is taken the Lay-By number is not assigned until you press **OK**.

8. In the 'Total Payable' field enter the deposit amount

Note: A minimum amount will be displayed, beside the 'Total Payable' field, this is pre-defined in the Lay-By options.

9. Select the tender type.

10. When you have finished press 'OK'. This will force the till drawer to open and two receipts will be printed. One of receipts will be for the customer; the second one will be kept by you but will require the customer's signature. Their signature specifies that they agree to the Lay-By terms and conditions.
11. To view all the payments made on a Lay-By, select the 'Payment History' from the bottom section of the 'Lay-By' screen. This will show all payments made over the life of the Lay-By (see Figure 83).

The screenshot shows the 'Lay-By' software window. At the top, it displays the customer information: Customer: JOHN CITIZEN, Lay-By No.: 37, Lay-By Status: In Progress, Sale Total: \$100.00, Less Payments: \$30.00, and Current Balance: \$70.00. Below this, there is a section titled '1 stock item purchased on this Lay-By' with a table showing a single item: Stock Item: BEROCCA ORIG EFF T 15, Date Added: 13/05/2009 1:51 PM, Quantity: 1, Retail: \$100.00, Disc: 0%, Subtotal: \$100.00. A button labeled 'Remove Selected Item From Lay-By' is visible. The bottom section is titled 'Payment History for this Lay-By (1 payment received):' and contains a table with one row: Salesperson: Corum Health, Payment Date: Wed 13/05/2009, Method: Cash, Amount: \$30.00, Balance: \$70.00, and Comments: Deposit. There is also a radio button for 'Payment History' (selected) and 'Payment Schedule'. A yellow button labeled 'Enter New Payment (+)' is located at the bottom right of this section. At the very bottom of the window are buttons for Lay-By Docket, Print Statement, Cancel Lay-By, Finalise Lay-By, and OK.

Stock Item	Date Added	Quantity	Retail	Disc	Subtotal
BEROCCA ORIG EFF T 15	13/05/2009 1:51 PM	1	\$100.00	0%	\$100.00

Salesperson	Payment Date	Method	Amount	Balance	Comments
Corum Health	Wed 13/05/2009	Cash	\$30.00	\$70.00	Deposit

Figure 83

12. The other option ‘Payment Schedule’ shows how much and how often a payment is expected to be made (see Figure 84).

The screenshot shows the Lay-By software window. At the top, it displays the customer name 'JOHN CITIZEN' and the lay-by number '37'. The status is 'In Progress'. Below this, a table shows a single stock item purchased: 'BEROCCA ORIG EFF T 15' with a quantity of 1, retail price of \$100.00, and a discount of 0%. The current balance is \$70.00. A section titled 'Payment Schedule for this Lay-By (4 payments remaining)' contains a table with four rows of scheduled payments due on Wed 27/05/2009, Wed 10/06/2009, Wed 24/06/2009, and Wed 08/07/2009, each amounting to \$18.00. This table is enclosed in a red box. At the bottom, there are buttons for 'Lay-By Docket', 'Print Statement', 'Cancel Lay-By', 'Finalise Lay-By', and 'OK'.

Sched. Payment Date	Amount Due
Wed 27/05/2009	\$18.00
Wed 10/06/2009	\$18.00
Wed 24/06/2009	\$18.00
Wed 08/07/2009	\$16.00

Figure 84

Note: If a payment is made sooner than expected or the payment is more/less than the expected amount, the ‘Payment Schedule’ will recalculate.

13. When complete select ‘OK’

14. After selecting ‘OK’ a docket will be printed and the customer will be required to sign it to confirm the Lay-By.

Note: When creating a Lay-By for multiple items you will be prompted with a message asking if you wish to ‘Combine all stock Items on one docket?’ If you select No, a separate docket will print out for each Lay-By item.

2.13.2 Making A Lay-By Payment

1. Navigate from the LOTS Start Menu → Sales → Lay-By.
2. This will display the ‘Lay-By’ screen. Enter the ‘Customers’ name followed by the ‘Lay-By No.’ to retrieve the Lay-By.
Note: Only customers who have active Lay-Bys will be available in the customer search.
3. Once the correct Lay-By is displayed select ‘Enter New Payment (+)’. This will display the ‘Enter Lay-By Payment’ window (see Figure 85).

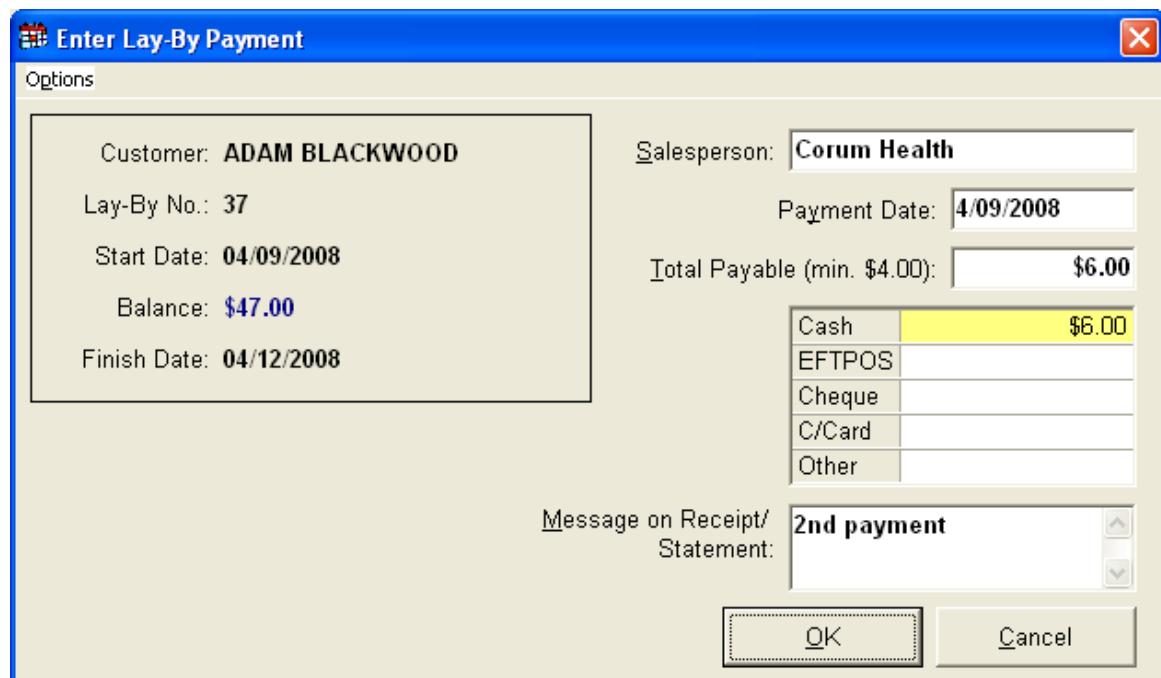


Figure 85

4. On the left hand side of the ‘Enter Lay-By Payment’ window it will display the customer name and the details relating to the Lay-By.
5. Enter your Staff ID into the ‘Salesperson’ field.
6. Enter the amount the customer wishes to pay, a minimum payment will be shown (see Figure 85).
7. In the ‘Total Payable’ field enter in the payment amount, select the tender type and select ‘OK’.

Note: The minimum payment displayed beside the ‘Total Payable’ field in the ‘Enter Lay-By Payment’ is defined Lay-By options.

2.13.3 Removing An Item From A Lay-By

1. Navigate from the LOTS Start Menu → Sales → Lay-By.
2. This will display the ‘Lay-By’ screen. Enter the ‘Customers’ name followed by the ‘Lay-By No’ to retrieve the Lay-By.
3. Once the correct Lay-By is displayed, highlight the item you wish to remove and select ‘Remove Selected Item From Lay-By’ (as shown in Figure 86).
Note: If there is only one item on the Lay-By this cannot be done and you will need to cancel the Lay-By instead (refer to section: **2.13.4 – Cancelling A Lay-By**).
4. A confirmation message will be shown, select ‘Yes’.
5. You may wish then to reprint the Lay-By docket by selecting ‘Lay-By Docket’ button.

2 stock items purchased on this Lay-By					
Stock Item	Date Added	Quantity	Retail	Disc	Subtotal
MACQUARIE ESTROVARIN 30	05/09/2008 9:30 AM	1	\$56.95	0%	\$56.95
MACHO GIFT SET	05/09/2008 9:30 AM	1	\$20.00	0%	\$20.00

Remove Selected Item From Lay-By

Figure 86

Note: If the item you remove is the only item left on the lay-by, thus forcing you to cancel the lay-by one of two things must happen as defined in Lay-By options, either:

- You must set up an account for the customer if they do not already have one (refer to section **8.2 – Turning A Customer Into A Debtor/Account Holder**) and credit their balance the value of the refund.
- Or simply refund the customer (refer to section **2.5 – Returns**).

2.13.4 Cancelling A Lay-By

1. Navigate from the LOTS Start Menu → Sales → Lay-By.
2. This will display the 'Lay-By' screen. Enter the 'Customers' name or the 'Lay-By No' to retrieve the Lay-By.
3. Select 'Cancel Lay-By' this will display the 'Cancel Lay-By' (see Figure 87), you will be prompted to enter a 'Reason for cancelling'. Depending on the payments the customer has made there may be a Lay-By 'Account credit amount'.

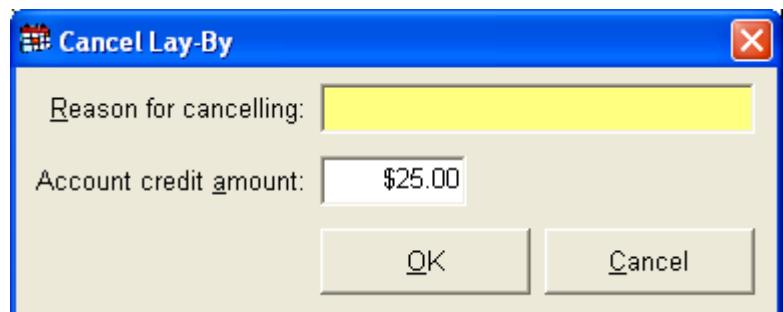


Figure 87

2.13.5 Add An Item To An Existing Lay-By

1. Navigate from the LOTS Start Menu → Sales → New Sale.
2. Select an item to sell and select 'Lay-By'
3. Enter the name of the customer who is on the existing Lay-By and select 'OK'.
4. This will display the 'Add Sale to Existing Lay-By' window (see figure 88).
5. This will give you the option to create a new Lay-By (Create New) or add it to an existing Lay-By (Select).

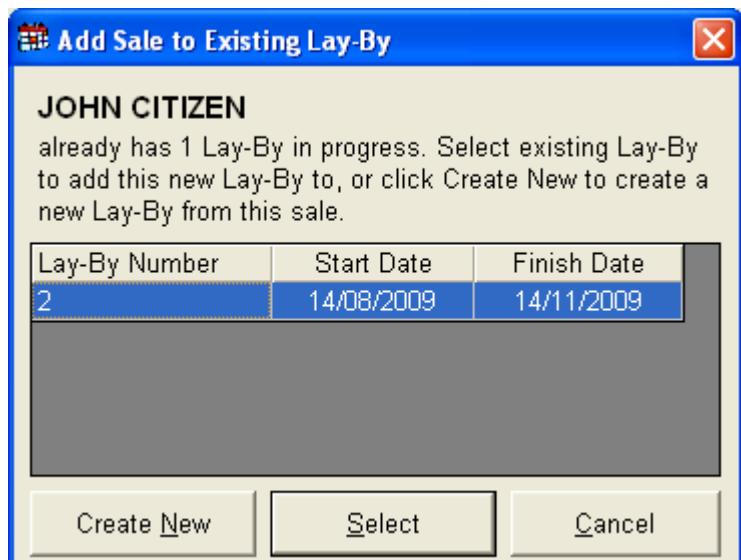


Figure 88

2.13.6 Lay-By Summary Report

The purpose of the Lay-By Summary Report is to show details of all Lay-Bys processed by the store, filtered by their current status.

Note: The Lay-By Summary Report can only be accessed if Lay-Bys are enabled and at least one Lay-By is already in the system

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Lay-By Summary Report.

2. This will display the 'Lay-By Summary Report' (see Figure 89).

Note: All of the filters are de-selected by default, but at least one 'Lay-By Status' must be selected to generate the report.

3. There are three Lay-By Status filter options:

- **In Progress** – allows you to generate a report displaying all current Lay-Bys. If 'In Progress' is selected you can also choose the additional filter of 'Finish Date Exceeded' which will allow you to view only those Lay-Bys that have passed their Finish Date.
- **Cancelled** – allows you to generate a report displaying all Lay-Bys that have been cancelled/not finalised.
- **Finalised** – allows you to generate a report displaying all Lay-Bys that have been finalised, paid in full, and collected by the customer.

4. Additionally, you can filter the report for a selected Date Range. Date Range filters include the following fields:

- **Start Date From**
- **Start Date To**
- **Finish Date From**
- **Finish Date To**

5. Furthermore you can base your report on a particular customer. Use the '**Select Customer**' field to enter in a customer's name.

6. Select the '**Sort on**' drop-down list to sort the report on either of the following:

- Lay-By Number
- Start Date
- Finish Date
- Status
- Customer Name
- Payments Received
- No. Sale Items
- Sale Value
- Balance

In addition you can also select to display the report in 'Ascending' or 'Descending' order.

7. Select '**OK**' to generate the report.

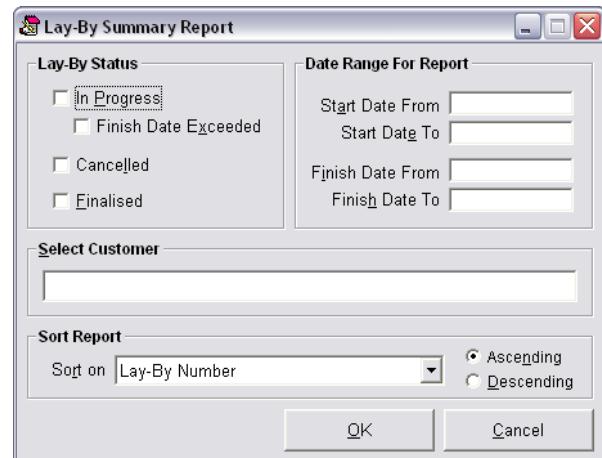


Figure 89

2.14 End Of Day

The End of Day process finalises your tills for the day in preparation to record sales transactions for the following day.

2.14.1 Setting The End Of Day Options

1. Within the 'End of Day Report' window, select 'Options' → 'Set Options' (as shown in Figure 90).
2. The 'End of Day Options' screen will be displayed (as shown in Figure 91). This allows you to choose the information that is to be included in the end of day and History reports and may be changed at any time.
3. Once you have selected the options you require, select the 'OK' button.

Note: These settings are local, not global, which means you can have different settings per Machine. For example, you might enable only limited options for a smaller printout from individual registers, but enable more options for a more comprehensive report on the computer you use to generate combined EOD reports or history reports on.

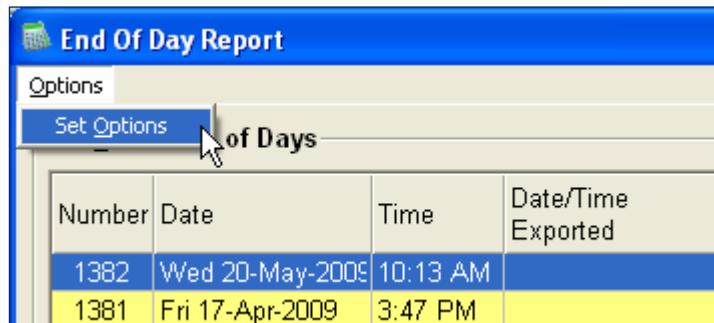


Figure 90

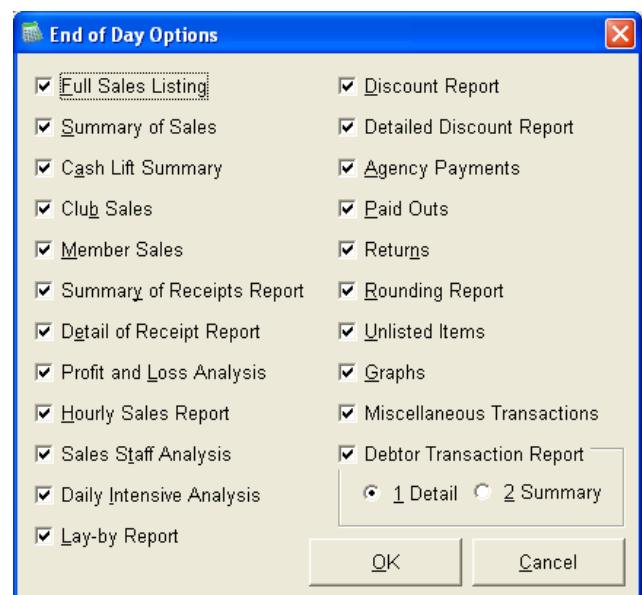


Figure 91

Option	Description
<u>Full Sales Listing</u>	This option will list all transactions that have been keyed into the till for the end of day period sorted by receipt number.
<u>Summary of Sales</u> (recommended)	This option provides a breakdown of sales as follows: <ul style="list-style-type: none"> • All Non-Account Sales broken down into GST Items and Non-GST Items. • All Account Sales broken down into GST Items and Non-GST Items. • Total Sales including and excluding GST and total GST from sales. • Stock Transfer Sales broken down into GST Items and Non-GST Items.
<u>Cash Lift Summary</u>	The shows all the cash lifts that have occurred for this end of day period. Details include Date/Time, Register, Staff Member, Type and total Excluding Float.
<u>Club Sales</u>	This lists all the club sales for the end of day period.
<u>Member Sales</u>	This lists all the member sales for the end of day period.

Option	Description
<u>Summary</u> of Receipts Report (recommended)	This option provided a breakdown of receipts as follows: <ul style="list-style-type: none"> • Non-Account Sales • Received on Account • Total Agency Sales • Paid Out
<u>Detail</u> of Receipt Report (recommended)	This option provided a breakdown of receipts as follows: <ul style="list-style-type: none"> • Cash • EFTPOS • Cheque • Credit Card • Other Payments/Voucher
Profit and <u>Loss</u> Analysis (recommended)	This option provided a breakdown as follows: <ul style="list-style-type: none"> • Total Sales excluding GST • Government Recovery (expected PBS payment) • C.O.G.S (Cost Of Goods Sold) • Gross Profit • % of Gross Profit on Sales • Number of Customers • Average Sale per Customer • Government Incentives • Abandoned Sales
<u>Hourly</u> Sales Report	This option provides an hourly breakdown of sales (i.e. 10:00am, 11:00am etc), including number of customers.
Sales <u>Staff</u> Analysis	This option provides a listing of all staff with a breakdown as follows: <ul style="list-style-type: none"> • Number of Customers • Staff • Customer Count • Sales (excluding GST) • Average Sales • Profit
Daily <u>Intensive</u> Analysis	The Daily Intensive Analysis report is broken up into two sections: Dispense and OTC. The Dispense and OTC section are broken down further by department. This option provides a breakdown of sales by department as follows: <ul style="list-style-type: none"> • Department Name • Quantity • Sales • Government Recovery • Average Sales (\$) • Profit (\$) • Gross Profit (\$) • Sales (%)
<u>Lay-by</u> Report	This option provides a breakdown of Lay-By Sales as follows: <ul style="list-style-type: none"> • Sales (Excluding GST) • Sales (Including GST) • Deposits • Payment <p>This option also lists all Lay-Bys by Lay-By number.</p>

Option	Description
<u>Discount Report</u>	This option provides a breakdown of: <ul style="list-style-type: none"> • Quantity of discounts given • Dollar Value of discounts for non-account sales • Dollar Value of discounts for account sales • Total Dollar Value of discounts given
Detailed Discount Report	This option provides a detailed list in dollar amount for the following: <ul style="list-style-type: none"> • Product • Quantity • Discount (%)
<u>Agency Payments</u>	This option provides a list of all agency payments made and the total for the day.
<u>Paid Outs</u>	This option itemises all paid outs including how much money was taken from the till and the description why.
<u>Returns</u>	This option provides a full list of all items returned and the dollar amount.
<u>Rounding Report</u>	This option provides a breakdown of sales requiring rounding up or down identified by receipt number and the total
<u>Unlisted Items</u>	This option provides a list of all items sold as unlisted items.
<u>Graphs</u>	This option provides two bar graphs, one illustrating the number of customers per hour and the other the dollar value of sales per hour.
Miscellaneous Transactions	This option lists all journal entries in dollar amount.
Debtor Transaction Report	<ul style="list-style-type: none"> • <u>1</u> Details – This lists all transaction details for each debtor, showing each individual item they purchased. • <u>2</u> Summary – This lists the total amount for each debtor, it does not show individual transactions.

Note: The EOD report also contains a stock transfer section. This section details all the stock transfers that have been conducted during the EOD period. Details include Debtor (stock transfer recipient), product, quantity, GST and amount.

Note: These options can be changed at any time. For example if you are viewing an end of day report, you can change what appears in it. Simply go into the 'End of day option' window and tick (or untick) the corresponding tick boxes and the end of day report will automatically update. This action can also be performed for previous End of Days and EOD history reports.

2.14.2 Running Total (X Reading)

An 'X Reading' allows you to see (and print) statistics for the selected computers without finalising the End of Day.

1. Navigate from the LOTS Start Menu → **Sales** → Reports drop down menu → **End of Day** (as shown in Figure 92).

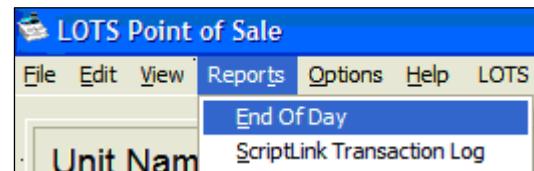


Figure 92

2. The '**End of Day Report**' screen will be displayed (see Figure 93).

3. To perform a running total for a single till, highlight the till you want. Select the '**Running total**' button located in the 'Selected Till' section.

4. To perform a running total for the whole shop, select the '**Running total**' button located in the 'All Tills' section.

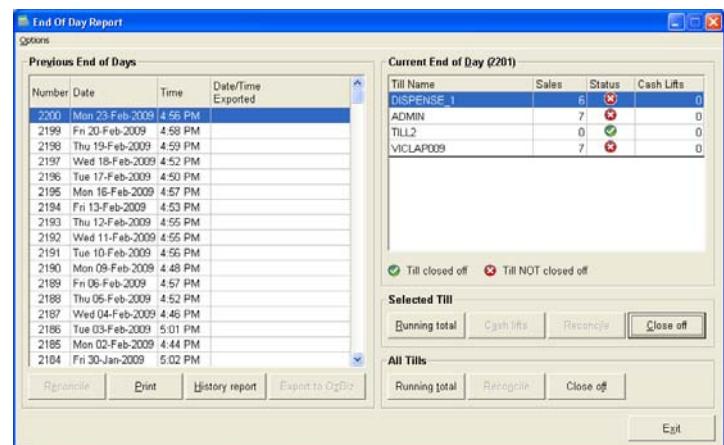


Figure 93

5. The Running total End of Day report will load (see Figure 94) press the '**Print**' or '**Exit**' button to continue.

Full Sales Listing									
Receipt	Date	Time	Staff	Till	Payment Type	Sales Type	Amount	Total Sales	
576009	19-Feb	4:59 PM	Fran B	TILL2	Manual EFT	Mixed	\$30.90	\$30.90	
576010	19-Feb	5:02 PM	Fran B	TILL2	Manual EFT	Mixed	\$14.95	\$14.95	
576011	19-Feb	5:04 PM	Ian Taylor	TILL2	Creditcard	Script	\$24.15	\$24.15	
576012	19-Feb	5:07 PM	Ian Taylor	TILL2	Cash	Script	\$5.30	\$5.30	
576013	19-Feb	5:07 PM	Fran B	TILL2	Cash	Mixed	\$15.95	\$15.95	
576014	19-Feb	5:08 PM	Fran B	TILL2	Creditcard	Script	\$56.75	\$56.75	
576015	19-Feb	5:10 PM	SUSAN M	TILL2	Creditcard	Mixed	\$14.95	\$14.95	
576016	19-Feb	5:11 PM	SUSAN M	TILL2	Cash	Mixed	\$20.00		
					Change		-\$16.05	\$3.95	
576017	19-Feb	5:12 PM	Ian Taylor	TILL2	Cash	Script	\$20.00		
					Change		-\$6.25	\$13.75	
576018	19-Feb	5:15 PM	Fran B	TILL2	Cash	Mixed	\$12.95	\$12.95	

Figure 94

2.14.3 Closing Off Tills (Z Reading)

1. Navigate from the LOTS Start Menu → Sales → Reports drop down menu → End of Day (as shown in Figure 95) .

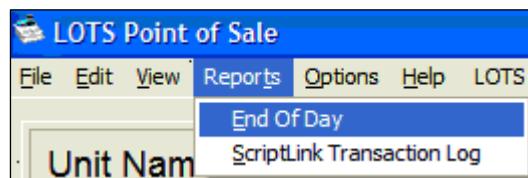
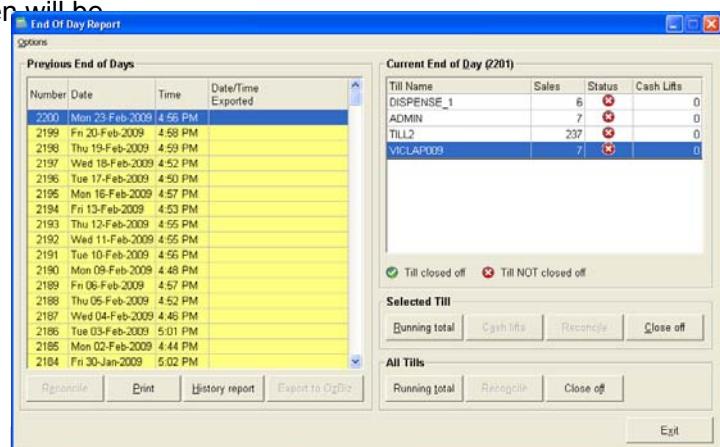


Figure 95

2. The 'End of Day Report' screen will be displayed (see Figure 96).



3. To close off a single till, select the till you wish to close off from the list of tills under the heading 'Current End of Day'. Then under the heading 'Selected Till' select 'Close off'.

Note: You may be prompted to reconcile your tills. Select 'Yes' to reconcile or 'No' not to reconcile.

4. The End of Day Report will be displayed (as shown in Figure 97). Simply press the 'Print' or the 'Exit' button to continue.

5. If the till you are closing off is the last to be done, then you will be prompted to print out a combined End of Day report (as shown in Figure 98).

Full Sales Listing								
Receipt	Date	Time	Staff	Till	Payment Type	Sales Type	Amount	Total Sales
576009	19-Feb	4:59 PM	Fran B	TILL2	Manual EFT	Mixed	\$30.90	\$30.90
576010	19-Feb	5:02 PM	Fran B	TILL2	Manual EFT	Mixed	\$14.95	\$14.95
576011	19-Feb	5:04 PM	Ian Taylor	TILL2	Creditcard	Script	\$24.15	\$24.15
576012	19-Feb	5:07 PM	Ian Taylor	TILL2	Cash	Script	\$5.30	\$5.30
576013	19-Feb	5:07 PM	Fran B	TILL2	Cash	Mixed	\$15.95	\$15.95
576014	19-Feb	5:08 PM	Fran B	TILL2	Creditcard	Script	\$56.75	\$56.75
576015	19-Feb	5:10 PM	SUSAN M	TILL2	Creditcard	Mixed	\$14.95	\$14.95
576016	19-Feb	5:11 PM	SUSAN M	TILL2	Cash	Mixed	\$20.00	
					Change		-\$16.05	\$3.95
576017	19-Feb	5:12 PM	Ian Taylor	TILL2	Cash	Script	\$20.00	
					Change		-\$6.25	\$13.75
576018	19-Feb	5:15 PM	Fran B	TILL2	Cash	Mixed	\$12.95	\$12.95

Figure 97

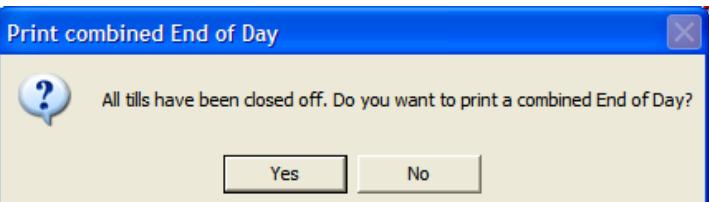


Figure 98

7. To close off all tills simultaneously simply select the 'Close off' button located under the 'All Tills' section.

Note: To finalise an End of Day all tills with transactions must be closed off.

2.14.4 Re-Print an End of Day Report

1. Navigate from the LOTS Start Menu → Sales → Reports drop down menu → End of Day (as shown in Figure 99).

Note: The End Of Day Module can also be accessed by navigating from the LOTS Start Menu → Reports → Sales Reports → End of Day

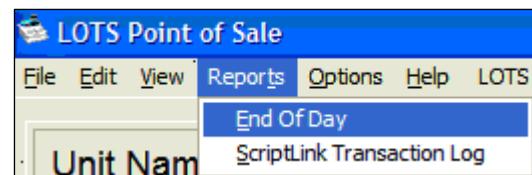


Figure 99

2. The 'End of Day Report' screen will be displayed (see Figure 100).

Previous End of Days				Current End of Day (2201)			
Number	Date	Time	Date/Time Exported	Till Name	Sales	Status	Cash Lifts
2200	Mon 23-Feb-2009	4:56 PM		DISPENSE_1	6		0
2199	Fri 20-Feb-2009	4:58 PM		ADMIN	7		0
2198	Thu 19-Feb-2009	4:59 PM		TILL2	0		0
2197	Wed 18-Feb-2009	4:52 PM		VICLAP009	7		0
2196	Tue 17-Feb-2009	4:50 PM					
2195	Mon 16-Feb-2009	4:57 PM					
2194	Fri 13-Feb-2009	4:53 PM					
2193	Thu 12-Feb-2009	4:55 PM					
2192	Wed 11-Feb-2009	4:55 PM					
2191	Tue 10-Feb-2009	4:56 PM					
2190	Mon 09-Feb-2009	4:48 PM					
2189	Fri 06-Feb-2009	4:57 PM					
2188	Thu 05-Feb-2009	4:52 PM					
2187	Wed 04-Feb-2009	4:46 PM					
2186	Tue 03-Feb-2009	5:01 PM					
2185	Mon 02-Feb-2009	4:44 PM					
2184	Fri 30-Jan-2009	5:02 PM					

<input type="checkbox"/> Till closed off	<input checked="" type="checkbox"/> Till NOT closed off
Selected Till	
Running total	Cash lifts
Reconcile	
Close off	
All Tills	
Running total	Reconcile
Close off	

Figure 100

4. Highlight the day and press the 'Print' button (you can also double click the line).

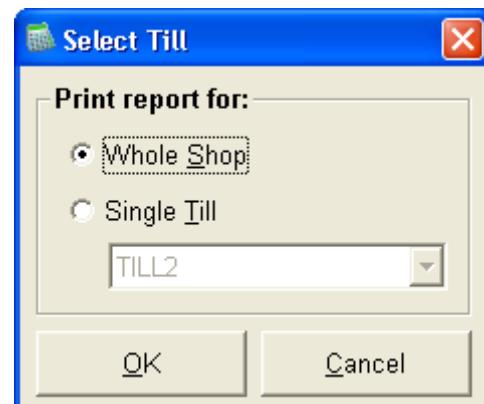


Figure 101

5. A screen will display (as shown in Figure 101) prompting you to specify whether you wish to print an end of day report for the whole shop or a single till.
 - **Whole Shop** – This will show the end of day for the whole shop (every till).
 - **Single Till** – This option will activate the drop-down list allowing you to do an end of day for a particular till.

Full Sales Listing								
Receipt	Date	Time	Staff	Till	Payment Type	Sales Type	Amount	Total Sales
576009	19-Feb	4:59 PM	Fran B	TILL2	Manual EFT	Mixed	\$30.90	\$30.90
576010	19-Feb	5:02 PM	Fran B	TILL2	Manual EFT	Mixed	\$14.95	\$14.95
576011	19-Feb	5:04 PM	Ian Taylor	TILL2	Creditcard	Script	\$24.15	\$24.15
576012	19-Feb	5:07 PM	Ian Taylor	TILL2	Cash	Script	\$5.30	\$5.30
576013	19-Feb	5:07 PM	Fran B	TILL2	Cash	Mixed	\$15.95	\$15.95
576014	19-Feb	5:08 PM	Fran B	TILL2	Creditcard	Script	\$56.75	\$56.75
576015	19-Feb	5:10 PM	SUSAN M	TILL2	Creditcard	Mixed	\$14.95	\$14.95
576016	19-Feb	5:11 PM	SUSAN M	TILL2	Cash	Mixed	\$20.00	
					Change		-\$16.05	\$3.95
576017	19-Feb	5:12 PM	Ian Taylor	TILL2	Cash	Script	\$20.00	
					Change		-\$6.25	\$13.75
576018	19-Feb	5:15 PM	Fran B	TILL2	Cash	Mixed	\$12.95	\$12.95

Figure 102

6. Press the 'Ok' button to run the report and then select the 'Print' button when the report displays (as shown in Figure 102).

2.14.5 End Of Day History

1. Select the 'History Report' button to generate an end of day history report.
2. The 'End of Day History' screen will display (as shown in Figure 103).
3. Once you have specified the Date Range, Time Range and Day of the week you would like to Report on select the 'Ok' button. The report will display ready for printing.



Figure 103

2.15 Till Reconciliation & Cash Lift

2.15.1 Till Reconciliation & Cash Lift Settings

1. To enable the Cash Lift and Till Reconciliation navigate from the LOTS Start Menu → Tools → Options → Till Reconciliation.

2. Once in the Till Reconciliation tab tick the 'Enable Cash Lifts & Till Reconciliation' tick box (see Figure 104). By ticking the tick box the rest of the window will become active.



Figure 104

3. Under 'Reconciliation' there are two tick boxes:
 - **Manual EFT** - Turns on the requirement to reconcile total Manual EFT value.
 - **Cheques** - Turns on the requirement to reconcile total cheque value.

4. You can also define the float of the till in the 'Default Float' field.

5. Under the 'Cash Lift' part of the window there are four tick boxes (see Figure 105) they are defined as follows:
 - **Allow Drawer Swap** – This will allow you to swap cash drawers.
 - **Allow Cash Lift** – This will allow you to take out excess cash and enter in these values.
 - **Allow 'Count Later'** – This will allow you to count the cash drawer later.
 - **Require second operator to sign off** – For security reasons you may wish for a second pharmacy attendant to sign off on the cash draw when conducting a cash lift or draw swap/

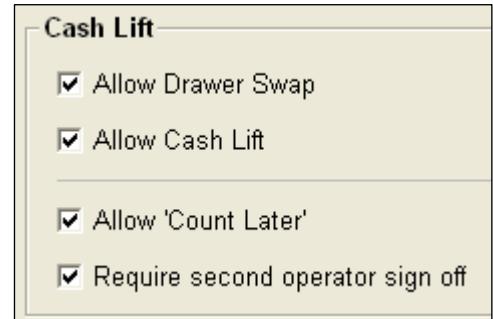


Figure 105

6. The other main option on the Till Recon window is 'Enable Cash Lift Reminder'. Once this option is ticked, you must choose one of two options, either:
 - **Remind when cash in drawer reaches** – This will prompt you to perform a cash lift when the money in the till reaches the specified amount (see Figure 106).
 - **Remind at this time** – This will prompts you to perform a cash lift at the specified time (see Figure 107).

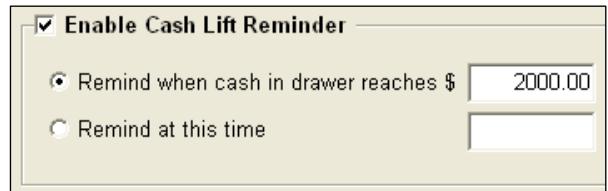


Figure 106

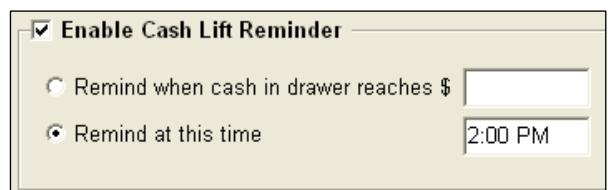


Figure 107

7. Once the options are set select '**OK**'.

2.15.2 Cash Lift/Drawer Swap

A cash lift is an operation whereby cash is removed from a trading register to a typically more secure location. There are two ways in which this can occur; partially (cash lift) or completely (drawer swap).

Note: It is necessary to perform a cash lift before performing till reconciliation.

- From the LOTS Sales screen select 'Cash Lift'.

Note: If you set a cash lift reminder you may be prompted to do a cash lift.

- This will display the Cash Lift window (see Figure 108).
- From the 'Select Register' drop-down menu select the register you wish to perform a cash lift for.

Note: The current register is selected by default.

- You must also select a Cash Lift Type. The only difference between 'Cash Lift' and 'Drawer Swap' is the 'New Float' field. When Drawer Swap is selected the New Float field is active.

Coins			Notes		
	Individual	Total		Individual	Total
5¢	10	0.50	\$5	35	175.00
10¢	26	2.60	\$10	41	410.00
20¢	116	23.20	\$20	122	2440.00
50¢	65	32.50	\$50	36	1800.00
\$1	44	44.00	\$100	6	600.00
\$2	39	78.00			
Total Coins : 180.80			Total Notes : 5425.00		
New Float: \$ 0.00			Total Manual EFT: \$ 89.36		
			Total Cheques: \$ 0.00		
			Final Total : 5695.16		

Figure 1089

Note: The drawer swap option is only available on the current register. If another register is selected then the 'Cash Lift' option will be selected and the 'Drawer Swap' option will be greyed out.

- After selecting the Cash Lift Type, begin counting the money. Each monetary type has two fields:

- Individual** – The number of each monetary type. For example the number of 5 cent coins there are.
- Total** – The total amount of the individual monetary type. For example the value of all the 5 cent coins when added together.

You will only need to enter in the value for one field.

If we use the 5 cent row as an example, if you type 10 into the 'Individual field', it will automatically populate the 'Total' field to be 0.50. The opposite also works; if you enter in a value for the 'Total' field it will automatically populate the Individual field.

Note: If you don't have any of a particular monetary denomination, simply leave the field for that denomination blank.

- Once all the values have been entered select 'OK'.

Note: If you have ticked 'Require second operator sign off', then after pressing OK, it will prompt for another operator to enter in their staff ID (and if required their Password).

2.15.3 Till Reconciliation

The Till Reconciliation screen is used (when performing an End of Day) to determine if any variations exist between the actual cash count (Actual Totals) and what LOTS expects to be in the till (Expected Totals).

1. To reconcile the tills navigate from the Sales → Reports drop-down menu → End Of Day. This will open up the 'End Of Day Report' window (see Figure 109).
2. From the End Of Day Report window click on 'Reconcile'.
3. By clicking on Reconcile the 'Till Reconciliation' window will appear (see Figure 110).
4. In the Till Reconciliation window under the Receipts tab it details the following:
 - **Expected Totals** – The expected sale total since the last end of day as recorded by LOTS.
 - **Actual Totals** – The total money of all the cash lifts, including floats, manual EFT transactions and cheques counted since the last end of day.

Both values should match.

5. If these two values don't match then the difference will be listed in the 'Variation' field. If the variation value is red then the Expected Total is more than the Actual Total.
6. If money has been knowingly removed or added to the till, the totals will not match and there will be a variation. The variation can be rectified by entering the known value into the 'Adjustment Amount' field and the reason for the adjustment in the 'Adjustment Reason' field (see Figure 111).

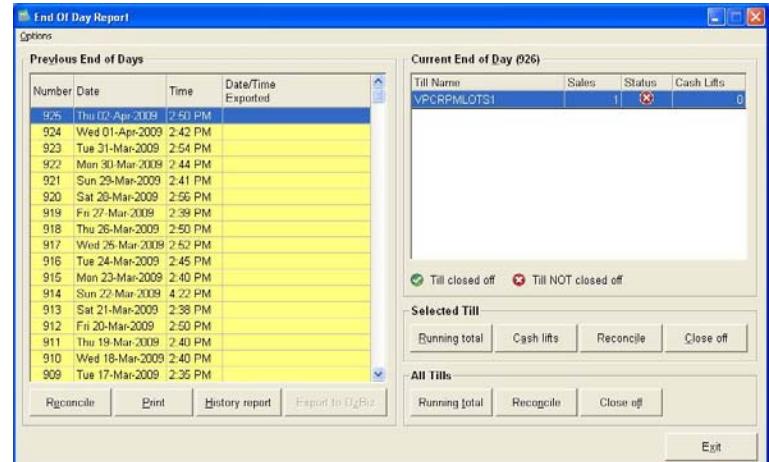


Figure 109

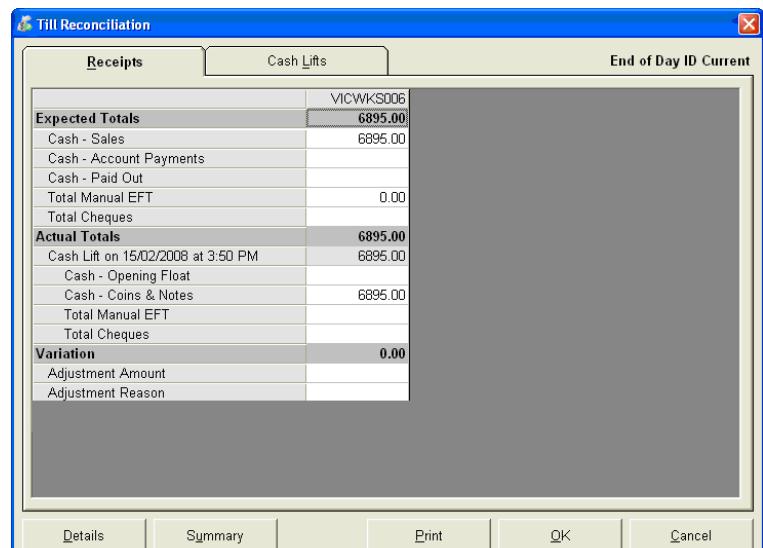


Figure 110

Variation	\$ 122.60
Adjustment Amount	122.60
Adjustment Reason	Purchased Stat

Figure 111

7. The 'Cash Lifts' tab (as shown in Figure 112) allows you to see what current cash lifts have been performed.

Denomination	Qty	Value
5c coins	34	1.70
10c coins	28	2.80
20c coins	60	12.00
50c coins	45	22.50
\$1 coins	78	78.00
\$2 coins	64	128.00
\$5 notes	36	180.00
\$10 notes	29	290.00
\$20 notes	104	2080.00
\$50 notes	70	3500.00
\$100 notes	6	600.00
Manual EFT		0.00
Cheques		0.00

Figure 112

8. The cash lift shows the following details:
- **Register** – The register that the cash lift was performed at.
 - **Staff Member** – The staff member that performed the cash lift.
 - **Date/Time** – The date and time the cash lift was performed on.
 - **Total** – The total value of the cash lift.
9. On the right hand side of this window you can see how the total was made up. This can aid in finding discrepancies when a cash lift/till has been counted.
10. You can double click on any of the entries in the cash lift tab to bring up the cash lift screen again to amend values if necessary.

2.16 POS Options

2.16.1 View/Delete Waiting Scripts

1. Navigate from the LOTS Start Menu → Sales → Options dropdown list → ScriptLink → View/Delete Waiting Scripts (see Figure 113).
2. This will display the ‘View/Delete Uncollected Scripts’ window (see Figure 114)
3. You have three options:
 - **Export** – Selecting Export will export the uncollected script into Microsoft Excel.
 - **Delete** – If you wish to delete an uncollected script simply highlight the script and select Delete.
 - **Print** – Selecting Print will display a report listing all uncollected scripts.



Figure 113

The screenshot shows a window titled 'View/Delete Uncollected Scripts'. It contains a table with one row of data:

Script	Patient Name	Address	Drug	Price	Private
526554	JOHN CITIZEN	123 PHAM STR...	30 LIPEX 10MG T	\$32.85	No

At the bottom of the window are four buttons: 'Export', 'Delete', 'Print', and 'Exit'.

Figure 114

2.16.2 Set Up Customers for Direct Charging

1. Navigate from the LOTS Start Menu
→ Sales → Options drop-down list
→ ScriptLink → Set Up Customers for Direct Charging (see Figure 115).



Figure 115

2. This will display the 'Set Up Customers from ScriptLink' window.

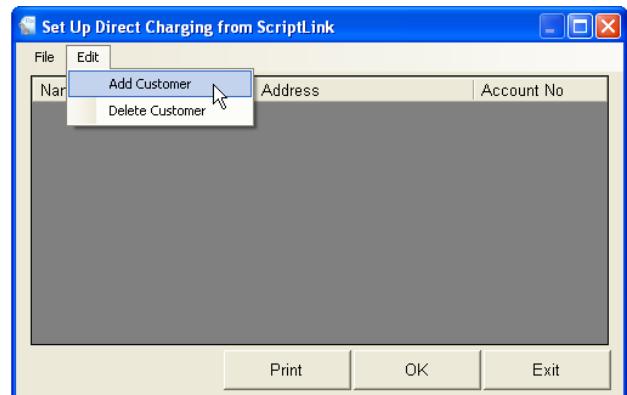


Figure 116

3. To setup a customer for direct charging select the Edit → Add Customer (see Figure 116).

4. This will display the 'Person Search' window (see Figure 117).

5. Enter in the details of the person you wish to set for direct charging and select 'OK'.

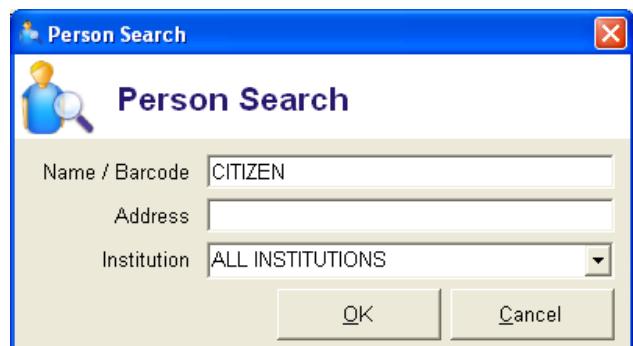


Figure 117

6. Once selected the patient will be shown in the 'Set Up Customers from ScriptLink' window, where you will need to enter in the customer patient number (from their dispense program) into the 'Account No.' field (see Figure 118). Doing this will link the patient from their dispense program to LOTS POS.

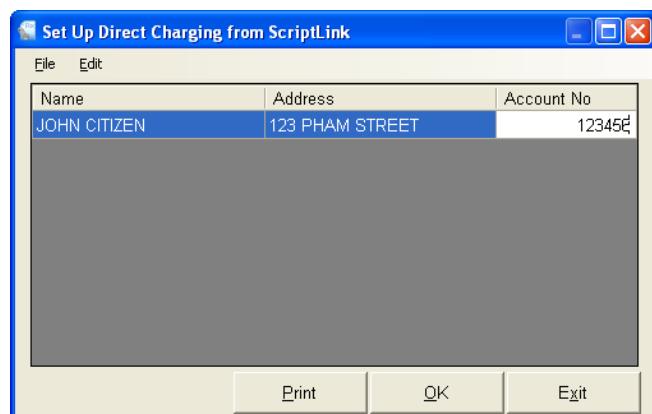


Figure 118

2.16.3 Receipts After Sale

1. Navigate from the LOTS Start Menu → Sales → Options dropdown list → Receipts After Sale (as shown in Figure 119).
2. There are several different options relating to the 'Receipts After Sale'.

The options are as follows:

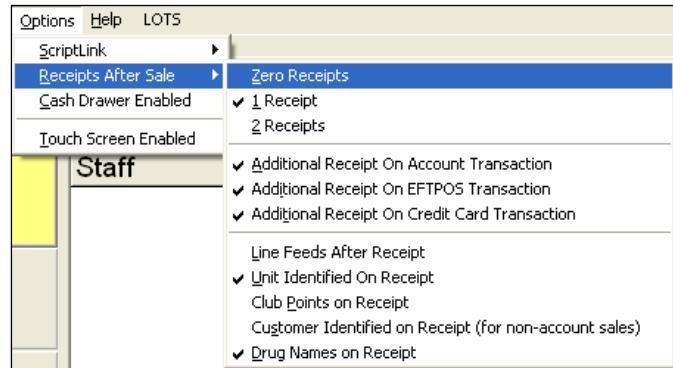


Figure 119

Option	Description
<u>Zero Receipts</u>	A receipt will only be printed out on demand.
<u>1 Receipt</u>	Only one receipt will print at the end of the sale.
<u>2 Receipt</u>	Two receipts will print at the end of the sale.
<u>Additional Receipt On Account Transaction</u>	An additional receipt will automatically print out for: <ul style="list-style-type: none"> Items that are sold on an account. Account payments.
<u>Additional Receipt On EFTPOS Transaction</u>	An additional receipt will automatically print out for EFTPOS sales.
<u>Additional Receipt On Credit Card Transaction</u>	An additional receipt will automatically print out for Credit Card sales.
<u>Line Feeds After Receipt</u>	This option enables you to request additional blank lines to feed upon completion of printing of the receipt.
<u>Unit Identified On Receipt</u>	When this option is selected each receipt will show which till the transaction was performed at.
<u>Club Points on Receipt</u>	When this option is selected and you have a Club set up, receipts will include customer's current Club Points.
<u>Customer Identified on Receipt (for non account sales)</u>	When this option is selected the customer's name and details will be displayed on the receipt.
<u>Drug names on Receipt</u>	This option allows you to have drug names from script sales included on the receipt. If this option was not ticked then only the script number would be displayed (e.g. Rx 58212).

2.16.4 Cash Drawer Enabled

1. From the 'LOTS Point of Sale screen navigate to the Options drop down menu → Cash Drawer Enabled (as shown in Figure 120).
2. This option should always have a tick placed to the left of it in order for the cash drawer to automatically open upon completion of a sale.

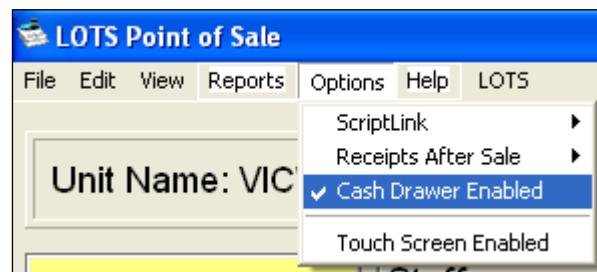


Figure 120

2.16.5 Touch Screen Enabled

1. From the 'LOTS Point of Sale screen navigate to the Options drop down menu → Touch Screen Enabled (as shown in Figure 121).
2. This option should always have a tick placed to the left of it in order for the touch screen to work.

Note: For the touch screen to work correctly in LOTS, specific drivers will need to be installed. For more information contact Corum Customer Support on 1300 760 022.

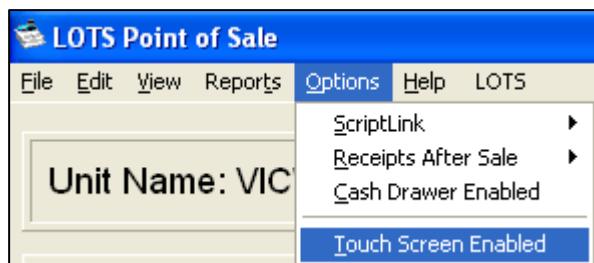


Figure 121

2.17 POS View Options

2.17.1 Display Other Days Sales

1. From the 'LOTS Point of Sale' screen select the View drop down menu → Display Other Days Sales (as shown in Figure 122).
2. This function allows you to view and print out a receipt for a particular sale performed on a previous day.
3. A screen will display prompting you to key in the appropriate date select the 'OK' button to continue (see Figure 123).
4. A listing of the sales for the selected day will display onto the screen. You can then reprint a receipt of a certain transaction.

Note: Always remember that after you have viewed the information that you want you must return the screen to the correct date view. This is done in exactly the same manner. Select View drop down menu→ Display Other Days Sales and the system should default to today's date. If correct select the 'OK' button and today's transactions will be displayed. Performing a 'New sale' will also return this list to today's sales.

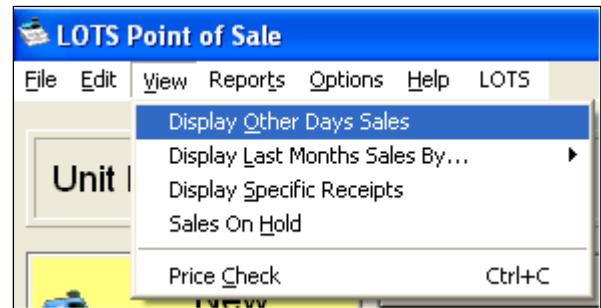


Figure 122

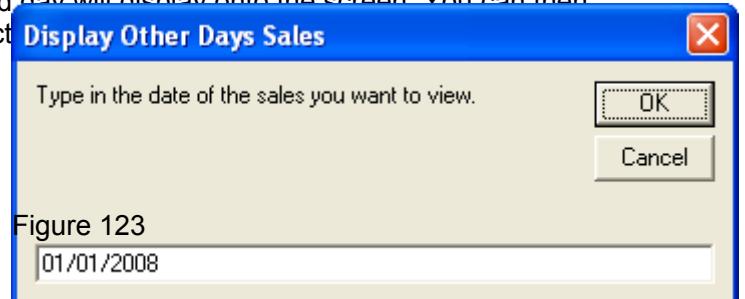


Figure 123

2.17.2 Display Last Months Sales

1. From the 'LOTS Point of Sale' screen select the **View** drop down menu → **Display Last Months Sales By...** (as shown in Figure 124).
2. This function allows you to view and print out a listing of sales for the last month sorted either by Cash, EFTPOS, Cheque, Credit Card, Other or Account Sales.
3. Upon selecting your search criteria, the sales for that payment type will be displayed on the screen (see Figure 125).

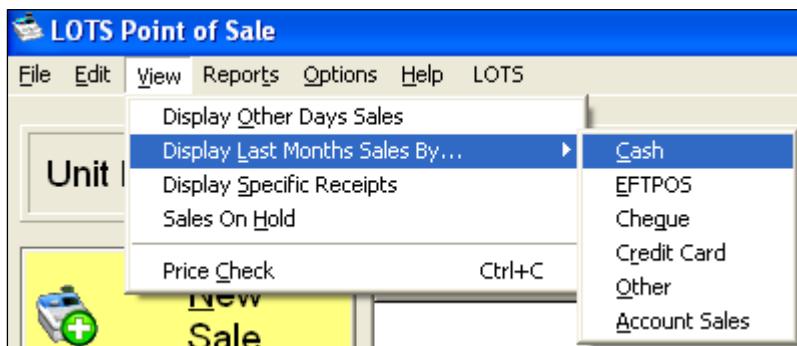


Figure 124

The screenshot shows the LOTS Point of Sale application window. The main area displays a list of sales transactions for Thursday, 20 March 2008. The table has columns for Staff, Items, Payments, and Date. The transactions listed are:

Staff	Items	Payments	Date
Pharmasol	EGO ACNEDERM FOAM WASH 150ML	\$59.75	18/02/08
Pharmasol	RX40 (30 PRAVACHOL 20MG T)	\$35.80	14/02/08
Pharmasol	EGO ACNEDERM FOAM WASH 150ML	\$11.95	12/02/08
Pharmasol	EGO ACNEDERM FOAM WASH 150ML	\$11.95	12/02/08
Pharmasol	EGO ACNEDERM FOAM WASH 150ML	\$11.95	12/02/08

The left sidebar contains icons for New Sale, Price Check, Returns, Agency Payment, Paid Out, Print Receipt, Account Payment, Stock Transfer, Lay-By, and Exit. The bottom right corner of the main window displays a message: 'LIST OF SALES FOR Thursday, 20 March 2008. 5 Press ENTER on 'Sold' sales to print a receipt. Press ENTER on 'On Hold' sales to retrieve them. Press N to start a new sale.'

Figure 125

Note: Always remember that after you have viewed the information that you want you must return the screen to the correct date view. This is done in exactly the same manner. Select **View** drop down menu → **Display Last Months Sales By...** and the system will default to today's date. If correct select the 'OK' button and today's transactions will be displayed. Performing a 'New sale' will also return this list to today's sales.

2.17.3 Display Specific Receipts

1. From the 'LOTS Point of Sale' screen navigate to the View drop down menu
→ Display Specific Receipts (as shown in Figure 126).
2. This function allows you to search for a Specific Receipt.
3. The search screen will display (as shown in Figure 127).
4. In order to search for the correct criteria you will need to know the actual receipt number, the customer's name or the receipt date.
5. Once you have found the script you will have the ability to reprint it by selecting 'Print Receipt'.



Figure 126

A screenshot of a dialog box titled 'Enter Search Criteria for Receipt'. It has a question mark icon in the top-left corner and a close button in the top-right corner. The title bar also says 'Enter Search Criteria for Receipt'. The main area is labeled 'Receipt Details:' and contains three input fields: 'Receipt Number:' (with a text input field), 'Customer Name:' (with a text input field), and 'Receipt Date:' (with a text input field). At the bottom are two buttons: 'Search' and 'Exit'.

Figure 127

2.17.4 View Sales On Hold

1. From the 'LOTS Point of Sale' screen navigate to the View drop down menu → Sales On Hold (as shown in Figure 128).
2. This function allows you to view all sales on hold, the date they were put on hold and which staff member placed the item on hold.
3. You can then Retrieve or Abandon the sales as you normally would do for sales on hold.



Figure 128

3 Stock Cards

Each product (OTC items and Drugs) have their own stock card. Stock cards contain all relevant information relating to this product. Product name, list cost, retail price, suppliers, PLU number are a few examples of these details. The information on these cards can be accessed/changed at any time.

3.1 Accessing Stock Cards

Each stock item requires a stock card, which is a 'card' in LOTS that contains a range of information on each product.

To access a Stock Card:

1. Navigate from the LOTS Start Menu → Stock Cards.
2. The 'Stock Search' window will display (as shown in Figure 129)
3. To search for an item the following information can be used:
 - Name
 - PLU
 - Barcode
 - Supplier Partcode (PDE)
 - UPI

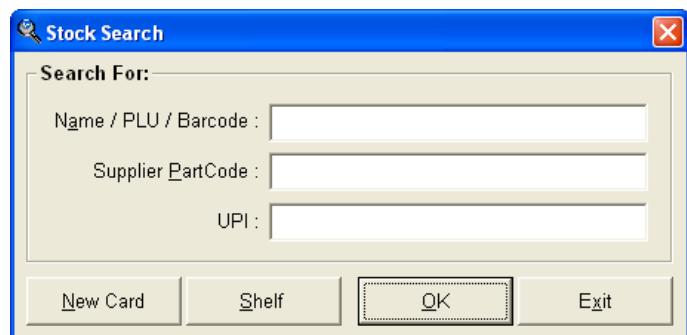


Figure 129

Note: You can also search for items using a 'Wildcard Searches' (for more information on wildcard searches refer to section: **3.15 – Useful Wildcard Searches Within LOTS**).

4. A list of items will be displayed according to your item search (as shown in Figure 130).

Select an Item from the list below							
	PLU	Name	Pack	Manu.	List Cost	Real Cost	Retail
1	536040	PANADEINE 15 T 12	1		3.94	3.08	5.95
2	435341	PANADEINE CAPLET 48 S3	1		8.13	6.89	12.45
3	770477	PANADEINE CAPLET X24	1		4.71	4.00	7.45
4	859060	PANADEINE CAPLT HAND/PK 16	1		2.56	2.14	3.95
5	617938	PANADEINE CLEAR TAB 20	1		5.35	4.54	8.45
6	523186	PANADEINE FORTE 500-30 T	50		8.96	8.72	13.45
7	600970	PANADEINE FORTE 500-30 T	20		3.59	2.96	5.45
8	702838	PANADEINE T 50PK	50		6.75	5.72	10.45
9	523216	PANADEINE T 50PK (NSW)	50		6.70	0.00	0.00

Drugs
Inactive Stock
Active Stock

Use the Up and Down arrow keys to scroll through the choices.
To select Press 1-9 or double click. For next group press 0 or Page Down.

OK Cancel

Figure 130

5. Select the item you want to access by clicking on it to highlight it and selecting the 'OK' button. Alternatively, you can press the line number or double-click the line that corresponds with the product.

6. The item's stock card information will be displayed on the 'Stock Information' Tab (as shown in Figure 131).

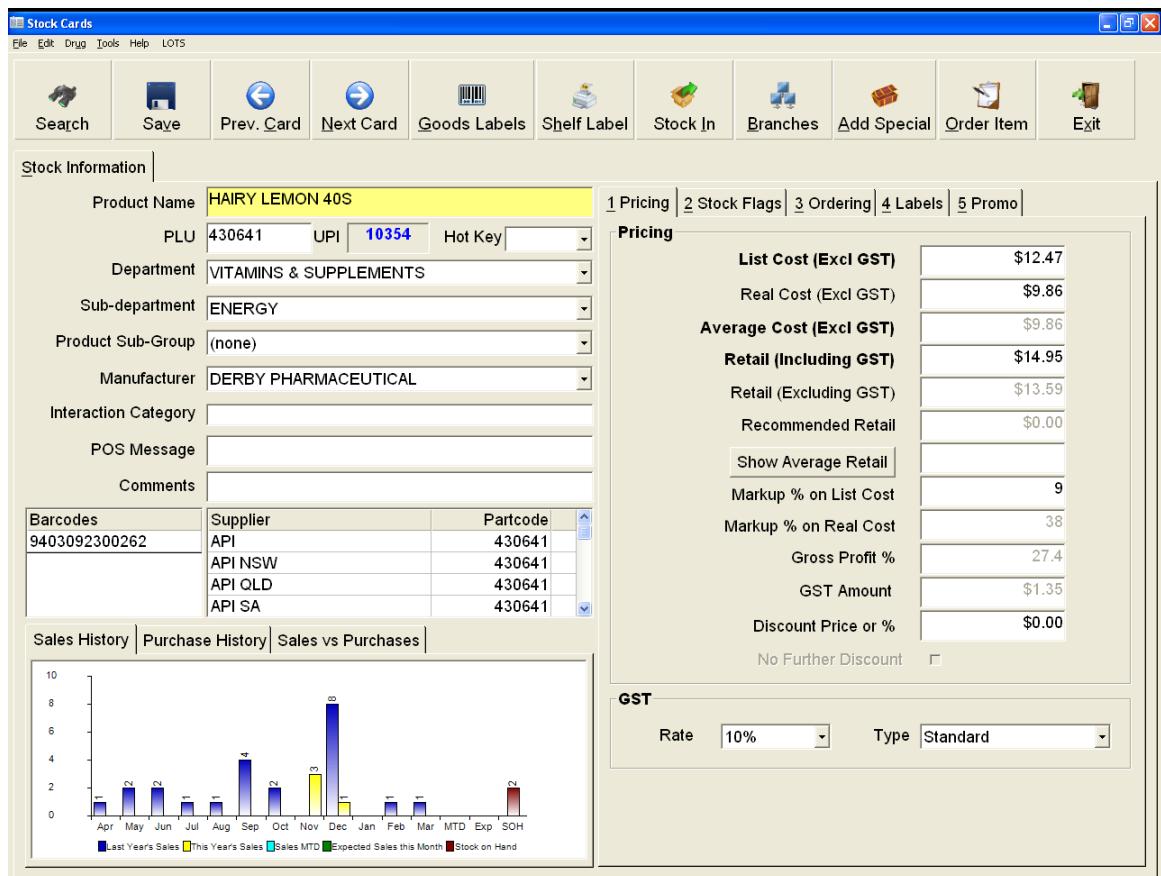
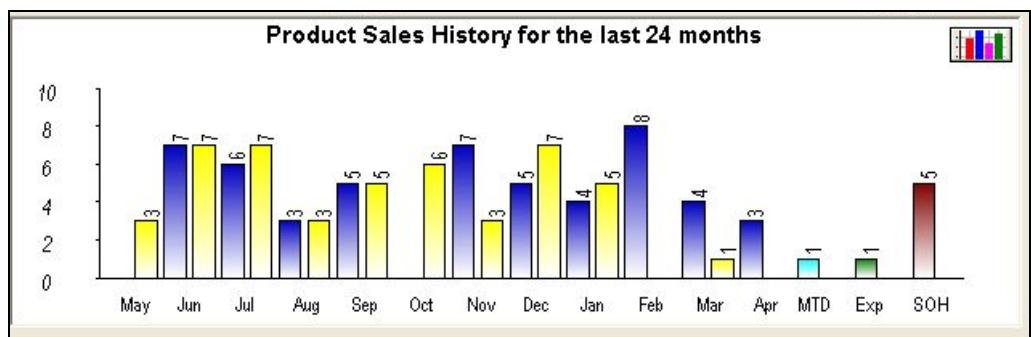


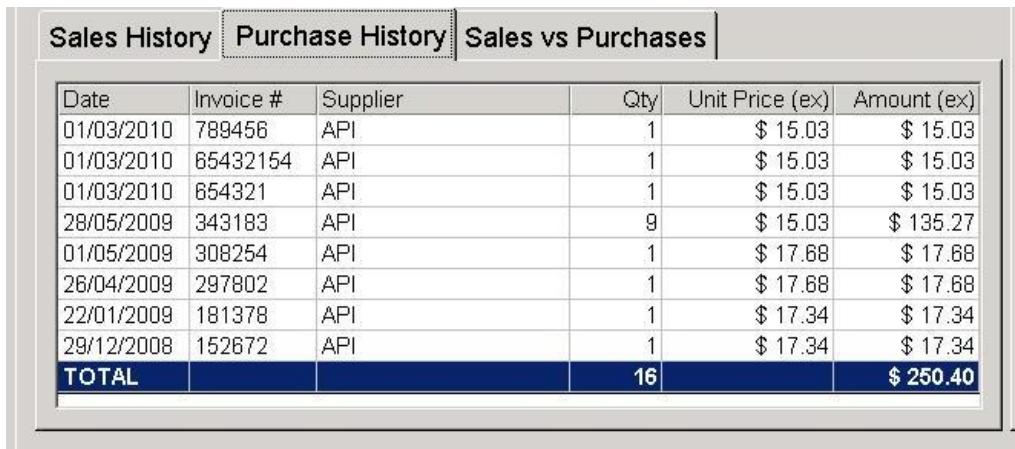
Figure 131

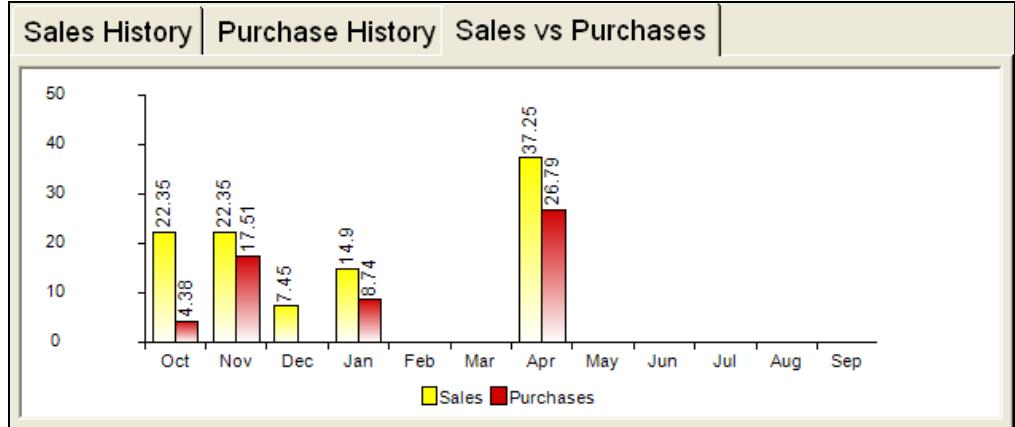
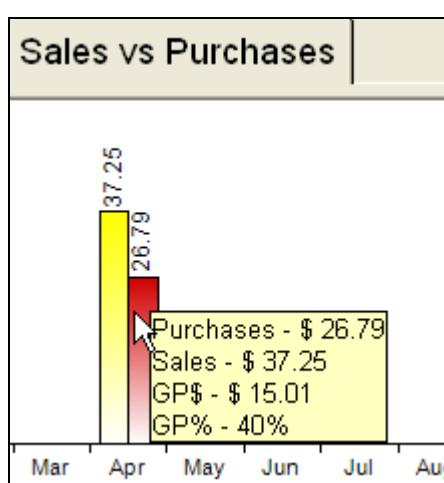
Below is a brief description of each field shown in the stock information tab:

Field	Description
Product Name	Description of the product. This should also include the quantity and metric measurements (if applicable).
PLU	'Price Look Up' number that may be used to search for a product and usually corresponds to the main wholesaler's PDE. This will be the same as your primary wholesaler's PDE number or, if unavailable from your primary wholesaler then it will be a number generated from LOTS (must be a 6-digit number only). As this number needs to be unique to a product, a PLU may need to be generated by pressing F2 (or Edit drop down menu → Generate PLU) in case the PDE number is the same as another product's main wholesaler PDE.
UPI	This number is a Unique Product Identifier and is a unique number allocated by Corum to the stock card (or your head office if a branch).
Hot Key	For services such as passport photos, hire, photographic processing etc, a 'Hot Key' may be specified for such transactions within the stock card. You can specify up to 99 different hot keys. Thus when in a new sale, to sell such items simply press the corresponding 'Hot Key' (e.g. 1, 2, 3, etc.) and press [Enter].
Department	Each new product needs to be allocated to a department and sub-department. If you have a product in stock cards that does not have a department, you may allocate it one using the drop-down box. If there is not a department that is suitable for a particular item then a new one may be created by going to the Tools drop-down list → Modify Department/Sub-Department.

Field	Description
Sub-department	If you allocate a product to a department you must also assign a sub-department to the product. If there is not a sub-department that is suitable for a particular item then a new one may be created by going to the <u>Tools</u> drop-down list → Modify <u>Department/Sub-Department</u> .
Product Sub-Group	Using product sub groups allows you to narrow down reporting of departments and sub-departments. For example instead of having different departments/sub-departments for baby products such as 'Baby Cream/Lotion', 'Baby Feeding', 'Baby Food' etc. you can have department/sub-department called 'Baby' and product sub groups like 'Baby Cream/Lotion', 'Baby Feeding', 'Baby Food' etc. If there is not a Product Sub-Group that is suitable for a particular item then a new one may be created by going to the <u>Tools</u> drop-down list → Modify Product <u>Sub Groups</u> . You can move items from a product group into a 'Product Sub Group' via the ' <u>Change Stock Cards</u> ' utility.
Manufacturer	This is the manufacturer of the product. In some situations suppliers may put themselves in this field. If you tick the 'Update <u>Manufacturer</u> ' tick box in the Price Update Options window then this field will get automatically updated every time you run a Price Update.
POS Message	When selling an item that contains a POS message, the message will flash up on the screen to prompt the staff to read it. Simply enter your POS message in this field; it can be up to 50 characters in length. For example for cough medicines you could enter in a companion selling message to prompt the staff members to ask the customer if they require a medicine cup.
Comments	A comment can be added to any product. For example "Product discontinued" or "Only Talk To Supplier Rep John Smith" The comment can only be viewed in Stock Cards.
Barcodes	Within LOTS there no restrictions to the number of barcodes that can be added to any particular stock item. Barcodes can simply be added or deleted by several different methods: <ul style="list-style-type: none"> • Highlight the barcode you wish to remove then press the [Delete] key. • Likewise if you want to insert a new barcode, simply press the [Insert] key when the barcode field is highlighted. • Right clicking in the barcode field will allow you to add or delete a barcode. • A barcode can also be added or deleted via the <u>Edit</u> drop-down menu → <u>Barcode</u>.
Supplier/Partcode Window	Within LOTS there are no restrictions to the number of Suppliers that can be added to any particular stock items. This listing of the suppliers also contains their part codes allowing you to easily order these products through LOTS Ordering. If you prefer to order this product directly from the supplier or your representative, you can mark the supplier as the 'Preferred Supplier'. Adding the supplier's name to the list of suppliers, and indicating that they are the preferred supplier will do this. By right clicking in the Supplier/Partcode window you can select one of three options: <ul style="list-style-type: none"> • Add Supplier/Partcode • Modify Supplier/Partcode • Delete Supplier/Partcode These options are also available from the <u>Edit</u> drop-down menu → <u>Supplier/Partcode</u> or by pressing the Insert/Delete keys. For more information refer to section 3.7 – Supplier/Partcode Window .

Field	Description
Sales History	<p>Sales history information is generated over time as the Point of Sale system is used. This history is displayed graphically showing monthly sales for last month, compared with the previous year; expected sales, month-to-date and stock on hand. Last year = last 12 months.</p>  <p>To be able to view the legend colour explanations, click into View and View Legend.</p>  <p>Note: At the beginning of every month a program called 'forecast' will automatically run which ages the current month's details and adds the total sold to the bar graph. This is all done whilst forecasting a new 'Expected Sales for this Month' value for the new month taking into account the most recent sales history.</p>

Field	Description
Purchase History	<p>The 'Purchase History' table displays all the purchase history for the selected product for the previous 24 months. The table displays six columns, they are:</p> <ul style="list-style-type: none"> • Date – This is the date the invoice was received for the product in LOTS 'Orders'. • Invoice # – This is the supplier invoice number. • Supplier – This is the supplier. • Qty – This is the amount in units. • Unit Price (ex) – This is price (Real Cost) paid for each item. • Amount (ex) – This is total amount paid for those items and is calculated by multiplying the 'Qty' by the 'Unit Price'.  <p>At the bottom of the 'Purchase History' table a total is displayed for the 'Qty and 'Amount' columns based on all invoices received in the past 24 months.</p>

Field	Description																																							
Sales vs Purchases	<p>The 'Sales vs Purchases' graph (Figure 10.3.1) displays the monthly sales alongside the monthly purchases for the past year. The values are displayed in dollars and cents.</p>  <table border="1"> <thead> <tr> <th>Month</th> <th>Sales (\$)</th> <th>Purchases (\$)</th> </tr> </thead> <tbody> <tr> <td>Oct</td> <td>22.35</td> <td>4.38</td> </tr> <tr> <td>Nov</td> <td>22.35</td> <td>17.51</td> </tr> <tr> <td>Dec</td> <td>7.45</td> <td></td> </tr> <tr> <td>Jan</td> <td>14.9</td> <td>8.74</td> </tr> <tr> <td>Feb</td> <td></td> <td></td> </tr> <tr> <td>Mar</td> <td></td> <td></td> </tr> <tr> <td>Apr</td> <td>37.25</td> <td>26.79</td> </tr> <tr> <td>May</td> <td></td> <td></td> </tr> <tr> <td>Jun</td> <td></td> <td></td> </tr> <tr> <td>Jul</td> <td></td> <td></td> </tr> <tr> <td>Aug</td> <td></td> <td></td> </tr> <tr> <td>Sep</td> <td></td> <td></td> </tr> </tbody> </table>	Month	Sales (\$)	Purchases (\$)	Oct	22.35	4.38	Nov	22.35	17.51	Dec	7.45		Jan	14.9	8.74	Feb			Mar			Apr	37.25	26.79	May			Jun			Jul			Aug			Sep		
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Jul																																								
Aug																																								
Sep																																								
	<p>If you place your mouse over one of the bar graphs additional information will be displayed (see Figure 10.3.2). The information displayed is:</p> <ul style="list-style-type: none"> • Purchases – This is the value of the purchases for the month (as represented by the red bar). • Sales – This is the value of the sales for the month (as represented by the yellow bar). This is calculated by using the retail price at the time of the transaction. • GP\$ – This is the gross profit in dollars. $GP\\$ = \text{Sales Ex GST} - \text{Real Cost}$ • GP% – This is the gross profit as a percentage. $GP\% = (GP\\$ / \text{Sales Ex GST}) * 100$  <table border="1"> <thead> <tr> <th colspan="2">Sales vs Purchases</th> </tr> </thead> <tbody> <tr> <td>Mar</td> <td>Apr</td> </tr> <tr> <td>May</td> <td>Jun</td> </tr> <tr> <td>Jul</td> <td>Aug</td> </tr> </tbody> </table>	Sales vs Purchases		Mar	Apr	May	Jun	Jul	Aug																															
Sales vs Purchases																																								
Mar	Apr																																							
May	Jun																																							
Jul	Aug																																							

3.2 1 Pricing Tab

Field	Description
List Cost (Excl GST)	Wholesaler's worst buy price for the product not including GST (this may not necessarily be true for Head office sites). This is used as a basis for recommended retail pricing as your list cost and the mark up creates the Retail Price. This will usually change every few months when and if your Wholesaler increases or decreases the price. List cost is updated via price updates and depending on your options, may be updated when supplier invoices are downloaded. Head Office site may receive list cost prices from their Head Office depending on their options.
Real Cost (Excl GST)	Actual price paid for the product not including GST (i.e. – Last Buy Price). This cost may fluctuate as the cost is calculated based on the price received when receiving an invoice.
Average cost (Excl GST)	Automatically calculated by the system over time and this cost is based on the real cost of the product, excluding GST.
Retail (Including GST)	Price of the item to the consumer at the Point of Sale which includes GST (where applicable).
Retail (Excluding GST)	Price of the item to the consumer at Point of Sale excluding 10% GST (where applicable).
Recommended Retail	This field displays the main wholesalers' or agencies' recommended retail price after running the LOTS price update. If you have never run a price update then this field will be greyed out and display \$0.00. This field can be enabled via the <u>Edit</u> drop-down menu → Enable Recommended Retail.
Show Average Retail	Pressing this button will show the average retail price for each product, calculated on all the different prices you have sold the product for.
Mark up % on List Cost	Percentage mark-up based on the list cost of the product.
Mark up % on Real Cost	Percentage mark-up based on the real cost of the product.
Gross Profit %	This is the gross profit made on the product, displayed as a percentage
GST Amount	Dollar amount of GST added to the product's retail price.
Discount Price or %	If you enter a value in this section and use the LOTS Clubs, when you are prompted at the commencement of a sale if it is a club sale and you answer 'Yes' it will apply the discount price that is within this field. This can either be a dollar amount discount or a percentage value discount.
No Further Discount	Following the Discount Price or % option if this option is ticked, it will not allow any further discount to be applied at POS.
GST Rate	Is what they store pays when they receive an order in of this product from the Supplier or Wholesaler. Either 0% or 10%.
GST Type	Is what the consumer pays when they purchase this product at the Point of Sale. Either 'Standard' GST or GST 'Free to End Consumer'.

3.3 2 Stock Flags Tab

Field	Description
Update	This function is only activated for sites that are part of a Checkout Head Office.
Goods Labels	<p>Where a product is not displayed on a shelf and / or the product does not have a barcode to scan.</p> <p>If this option is selected, when order delivering the item through an order it will automatically print out a goods label corresponding to the Stock on Hand ordered.</p> <p>The goods label option, displays the product description, barcode and PLU number. If you wish the retail price to also be displayed on the goods label then the 'Price on Label' option must also be selected.</p>
Ask Price	Usually used in conjunction with 'Hot Keys' when the retail price varies and needs to be specified at Point of Sale (e.g. photographic development, Hire Deposit and Scripts Ask Price, etc.). If this option is ticked the cursor will default to the Retail price field ready for you to enter in the correct price.
Seasonal	This option is only selected in situations where the sale of specific products varies dramatically from one season to another (e.g. suntan lotion in tourist destinations and allergy tablets during hay fever season) and is used when generating orders as it affects the forecast calculations of 'Expected Sales for this Month'. Where expected sales are normally weighed towards the previous three months sales history, marking an item as seasonal means forecasting will look at sales history this time last year instead.
Only Order if Negative SOH	If this option is selected the item would only be included in an order if the SOH is less than zero. The Order algorithms will order a quantity to bring the SOH back up to zero. E.g. If the SOH was -2 then the quantity ordered would be 2.
Re-Order	<p>This option will always need to be selected if you wish for LOTS to include this product in suggested orders. You can however still order the product manually if it is set to not re-order but the system will never prompt to automatically reorder the item if it is not ticked.</p> <p>This option is not ticked for items that are discontinued or for items you no longer wish to stock.</p>
Price on Label	See the 'Goods Label' option above.
Allow Discount	<p>This option is to be selected if you allow the product to be discounted at the Point of Sale.</p> <p>If the product is a Nett item whereby you don't want to allow the customer to receive a discount you need to ensure this is not ticked. This will prevent LOTS from applying discounts on these specified products.</p>
Shelf Label	<p>If this option is selected, when a retail price change occurs LOTS will automatically send a shelf label (with a new retail price) to the shelf label queue. Shelf labels can be printed in bulk by navigating from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Print Shelf Labels.</p> <p>Note: If a product is not displayed on a shelf or does not have a barcode on the packaging, then a Goods Label may be required (see above).</p>
Discontinued	Ticking this option will mark the item as discontinued from the wholesaler. To be able to mark a product as discontinued the Re-Order option must be unticked. Once an item is marked as discontinued it cannot be added to an order.

Field	Description
Stock On Hand	What the program believes is the actual stock on hand value. This amount can be adjusted when a stock take is performed and is continually adjusted as products are sold and order delivered using the LOTS program. If this value is edited by the user it will require a reason to be entered.
Expected Sales for Month	Calculated by the system over time this value varies month to month depending upon the sales history. This 'expected sales for month' total is also displayed within the sales history graph in green.
Sales MTD	'Sales Month to Date' is calculated by the system during the current month period. This total displays all transactions including returns, during the 1st of the Month to the current date.
Stock On Order	If an item is on order, this field will display the quantity on order.
Last Order Date	This field displays the last date that an item was order delivered via the Ordering Module only.
Last Sold Date	This field displays the last date that an item was sold in LOTS.
Locations	You can add one or more store locations for a product. By right clicking in the locations window you can add, modify or delete a previously set location. A location can be set by navigating from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Storage Locations. For more information refer to section: 3.19 – Storage Locations .

Note: All of the stock flags options (except 'Only Order if Neg. SOH') can be turned on or off (in bulk) via Stock Card Options (refer to section. **3.17 – Stock Card Options**).

3.4 3 Ordering Tab

Field	Description
Minimum SOH (Optional)	<p>The minimum SOH value allows you to define the least amount of units (for that product) to be held in the pharmacy.</p> <p>When this value has been reached the product will be added to the supplier order the next time one is generated.</p> <p>Note: The order quantity (provided it is greater than zero) will be rounded to the Minimum Order Qty for the selected supplier.</p>
Maximum SOH (optional)	<p>The maximum SOH will ensure that when an order is generated this amount is not exceeded.</p> <p>Note: There may be situations involving carton sizes where the maximum SOH may be exceeded.</p> <p>E.g. if your maximum SOH is set to 12 and your current SOH is 10 and your carton size is set to 5, then 5 units will be ordered taking your SOH to 15 (10+5).</p>
Ordering Category	<p>The 'Ordering Category' section will allow you to define when you wish to order the item.</p> <ul style="list-style-type: none"> • Include In Ethicals – If this option is selected the product will be ordered when an ethical order is placed. • Include In OTC – If this option is selected the product will be ordered when an OTC order is placed.
Preferred Supplier Info.	<p>This displays the supplier info for the supplier that is marked as preferred (will be blank if no preferred supplier is set).</p> <p>To make changes to these files you must double click on the supplier's name in the Supplier/Partcode window.</p> <ul style="list-style-type: none"> • Order Multiple – This is the incremental value you must order in. For example if Order Multiple is set to 3 then you must order in multiples of three (3, 6, 9 etc). • Min. Order Qty – The minimum order quantity as set by your preferred supplier. • Carton Size – This value is the number of retail units per box that is received from the supplier.
Single Unit Details	<p>This section contains two fields that provide you with some additional ordering information.</p> <ul style="list-style-type: none"> • Items per Unit (Dispense Only) – This field refers to the number of measures in a unit. E.g. Amoxil 500MG 20 would contain 20 tablets. • Brand – This is the 2-letter PBS Manufacturer code.
Deal Pricing	<p>The 'Deal Pricing' section will only be shown to sites connected to an RPM Head Office and contains specific RPM deal pricing information:</p> <ul style="list-style-type: none"> • Nett into Store – This is the price that you should be paying for the product. N.I.S is calculated via List Cost minus the Discount on List Cost %. • Negotiated Cost – This is the cost from your supplier when taking into account rebates, discounts, bonus stock and cash bonuses for the products.

3.5 4 Labels Tab

Field	Description
Print Directions on Small Labels	For dispense labels if this option is ticked it will replace the safety net details with directions on the label. The small label can be used on items that are too small for normal sized labels e.g. eye drops. If you wish to print the safety net details as well tick the 'Always print second label' option, this will print the first label as normal and will then print a second small label with only the directions printed on the safety net part of the label.
Hide Product Name on Customer Display	There may be some products you do not wish to show up on the customer display, tick this option to stop the product's name appearing on the customer display (if connected).
Item Image	You can add an image to a product's stock card. This image displays when the companion sale prompt appears within sales, and can be displayed on a customer display screen.

3.6 5 Promo Tab

Field	Description
Item Clubs	This window will list all the clubs that the product is associated with.
Companion Items	<p>This window will show all companion Items associated with the product. To add or delete a companion Item right click in the window and select either:</p> <ul style="list-style-type: none"> • Add Companion Item (+ button) • Delete Companion Item (- button) <p>You can also select if you would like the item to prompt as a companion item at POS or Dispense. Alternatively you can tick both.</p>
Companion Text	<p>This option allows you add to multiple Companion Sale texts and assign them to different Companion Items. Alternatively, you can continue to assign the same Companion Sales text to all Companion Items.</p> <p>This option allows you to set product specific companion text (for more information refer to section 3.8 – Set Product-Specific Companion Text).</p>

3.7 Supplier/Partcode Window

This module is where you setup each supplier's individual ordering options for the item. The business rules for Carton Size & Order Multiple are as follows:

- If the Carton Size is greater than 1 and the Order Multiple equals 1 then – the order quantity is rounded to the nearest carton size.
- If the Carton size is 1 and the Order Multiple is greater than 1 then – the order quantity is rounded to the nearest order multiple.

1. Access the Supplier/Partcode window from Stock Cards → Edit drop-down menu → Supplier/Partcode → Modify Supplier/Partcode (see Figure 132).

Note: The Supplier/Partcode window can also be accessed by double clicking on the supplier name.

2. The 'Name' field is the description of the product as set by the supplier. This gets automatically populated by the price update (or RPM if a head office site).

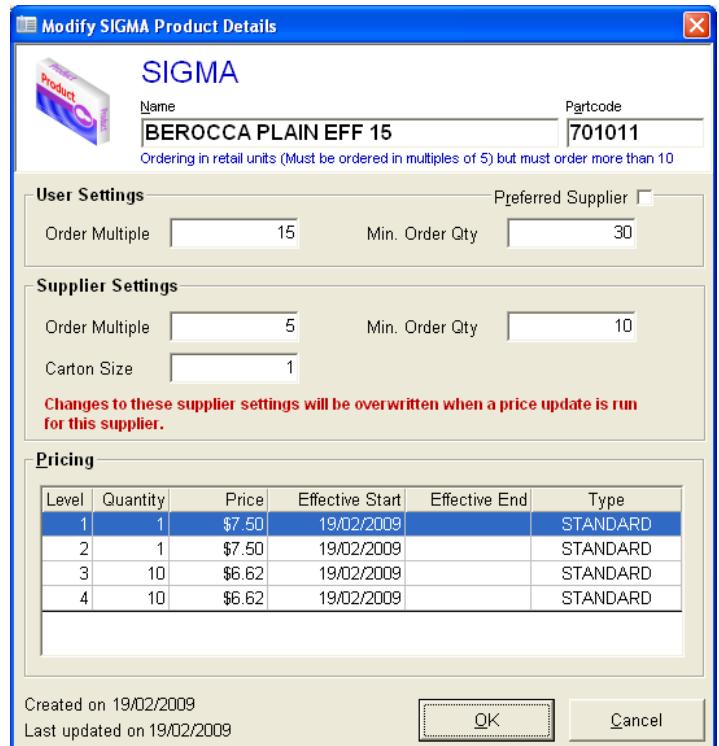


Figure 132

3. Once you have entered the ordering settings, the 'Name' field, 'Blue Helper Text' will appear based on your order quantities (see Figure 133).

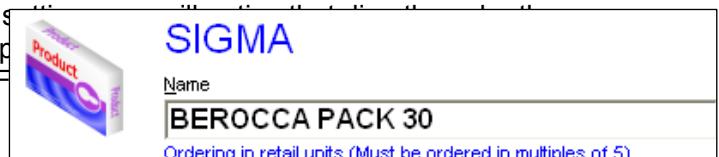


Figure 133

4. Depending on whether you have set to order in, a different icon will be displayed:
 - Retail Units (Figure 133)
 - Cartons (Figure 134)
 - Cartons with Multiple Order Quantity (Figure 135)

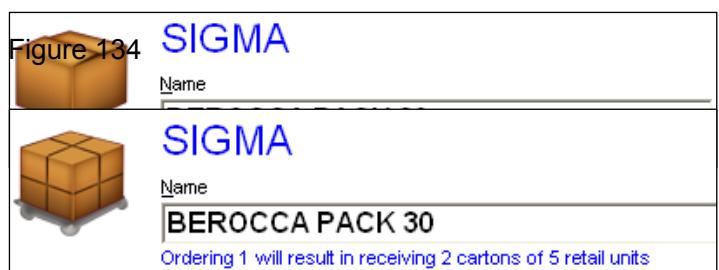


Figure 135

There are three sections in the product details window and they are:

- Supplier Settings
- User Settings
- Pricing

5. The **Supplier Settings**

(Figure 136) are the required order settings for this product as defined by this supplier. There are three Supplier Settings fields that are set:

Supplier Settings	
Order Multiple	5
Min. Order Qty	10
Carton Size	1
Changes to these supplier settings will be overwritten when a price update is run for this supplier.	

Figure 136

- **Order Multiple** – This is the order quantity in multiples you are required to order in as defined by the supplier.
- **Min. Order Qty** – This is the minimum order quantity you are required to order in as defined by the supplier.
- **Carton Size** – The Carton Size is the number of retail units that is received from the supplier in each carton.

6. The **User Settings** (Figure 137) allow you to specify

quantities over and above the quantities set by the supplier. There are two User Settings fields that you can set, these are:

User Settings	
Order Multiple	15
Min. Order Qty	30

Figure 137

- **Order Multiple** – This is the order quantity in multiples you wish to order in. This value must be a multiple of the 'Supplier Settings Order Multiple'.
- **Min. Order Qty** – This is the minimum order quantity you wish to order in. This value must be equal to or greater than the 'Supplier Settings Min. Order Qty'.

7. In most situations you will have more than one supplier for your product. To set your preferred supplier simply tick the 'Preferred Supplier' tick box, located in the top right corner of the 'User Settings' section (see Figure 137).

Note: Changes made to the supplier settings will be overwritten the next time a price update is run for this supplier.

The User Settings will also be affected if any of the Supplier Settings change to a value greater than 1.

8. The Pricing section details the pricing levels as defined by the supplier (see Figure 138). This section will be updated every time a price update is run.

Pricing					
Level	Quantity	Price	Effective Start	Effective End	Type
1	1	\$7.50	19/02/2009		STANDARD
2	1	\$7.50	19/02/2009		STANDARD
3	10	\$6.62	19/02/2009		STANDARD
4	10	\$6.62	19/02/2009		STANDARD

Figure 138

3.8 Set Product-Specific Companion Text

1. Navigate from the LOTS Main Menu → Stock Cards.
2. In Stock Cards, use the 'Stock Search' window to display the product that you wish to add companion text to.
3. Select the '3 Ordering' tab and you will now see a 'Companion Text' section (see Figure 139).
4. To set the companion text that will be displayed on the customer display screen for the defined companion items, click on the 'Select' button.
5. This will display the 'Add/Edit Companion Text' window (see Figure 140).
6. This window will list all the default companion texts you have set. The companion text you set in Tools → Options → Companion Sales will be highlighted in yellow.
7. To add new companion text, select 'New'. This will display the 'New Companion Text' window.
8. Use this window to enter in your companion text and select 'OK' (see Figure 141).
9. You can also modify any existing companion text by simply highlighting the text and selecting 'Modify'.
10. To delete a companion text, highlight the text and select 'Delete' (see Figure 140).

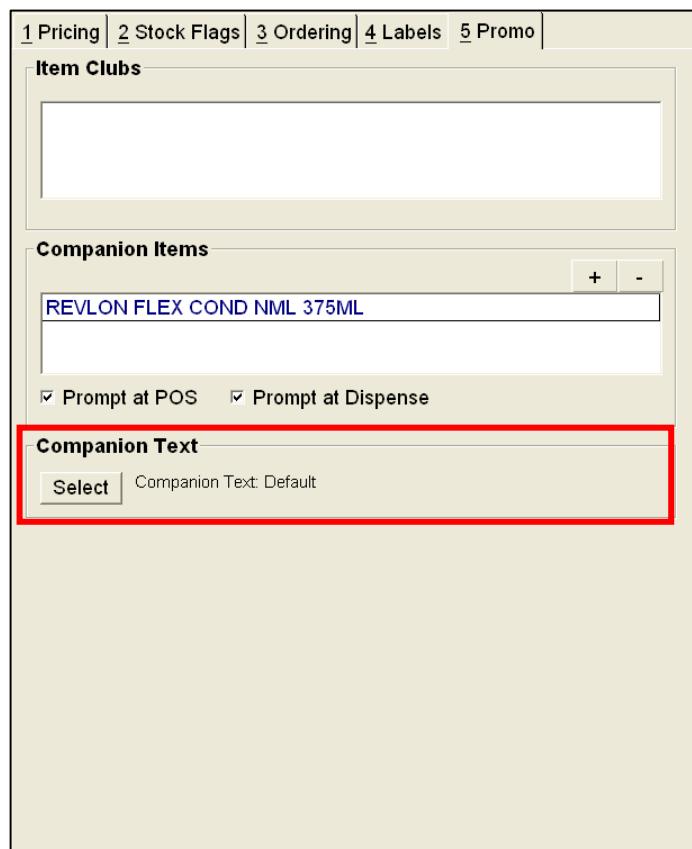


Figure 139

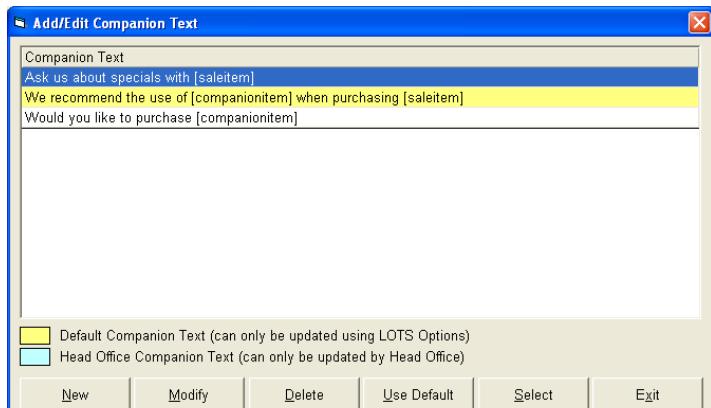


Figure 140

Note: The Default Companion Text (highlighted in yellow) can only be modified in LOTS Options.

Note: When any companion text is modified, this will modify the companion text on every stock card that uses it.

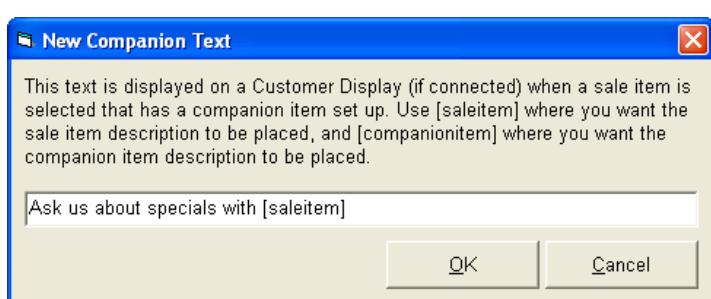


Figure 141

Note: By deleting a companion text this will remove that particular companion text from every stock card that uses it. You cannot delete the 'Default' Companion Text, as this must be done from LOTS Options.

11. To set companion text to your companion item simply highlight the text in 'Add/Edit Companion Text' window and click on 'Select'.

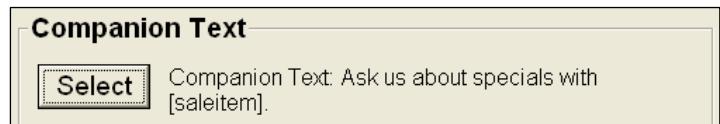


Figure 142

12. This will close the window and display your selection in the Companion Text section (see Figure 142).

Note: You can revert to the default companion text at anytime by selecting 'Use Default' followed by 'Select'.

13. When a sale item is being sold the companion item window will be displayed (see Figure 143). This window will allow you either add the item to sales ('Add To Sale') or 'Cancel'.

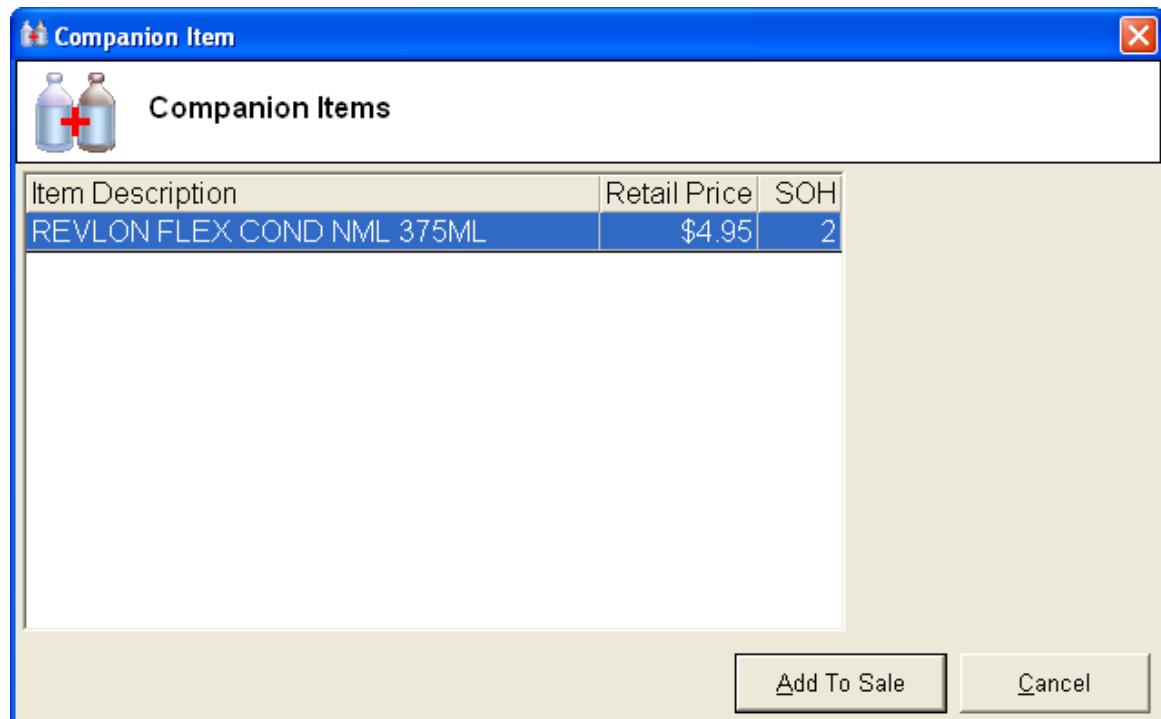


Figure 143

3.9 Stock Card Menu Buttons

Field	Description
<u>Search</u>	Selecting 'Search' will allow you to exit the current product's stock card and search for another product's stock card. If you have made any changes to the current product's stock card you will be prompted if you want to save your changes. Select 'Yes' if you want to save your changes, otherwise select 'No' to cancel. You must make a selection to allow you to continue.
<u>Save</u>	This allows you to save all changes you have made to any stock card in either the 'Stock Information' tab or 'Drug Information' tab.
<u>Previous Card / Next Card</u>	Selecting 'Previous Card' or 'Next Card' allows you to move to the previous or next stock cards respectively. Stock Cards are sorted alphabetically by 'Product Name'. 'Page Up' and 'Page Down' are the keyboard shortcuts.
<u>Goods Labels</u>	Selecting the 'Goods Labels' button allows you to print out a specified number of goods labels for the product currently being displayed. In order to prevent label wasting LOTS tries to print only whole rows of stickers. If you request a quantity that is not a multiple of 3 (assuming 3-across labels) all the whole rows are printed. The remaining labels will be held in memory and printed when either subsequent labels are requested or the Stock Cards module is exited.
<u>Shelf Labels</u>	Selecting the 'Shelf Labels' button advises the system that at a later time you wish to print out a shelf label for the product. This facility enables you to queue multiple shelf labels in the labels printer and print them out in batches when you wish to, instead of one at a time. The shelf label queue can be found by navigating from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Print Shelf Labels.
<u>Stock In</u>	This function can be used for entering in bonus stock from a supplier. Enter the quantity coming in, modify the Real Cost and the Total GST Paid, and then select the 'OK' button. This will update the SOH to reflect this amount and the average cost will be recalculated to reflect these bonuses for this product. Note: For bonus stock the Real Cost and GST will need to be set to zero.
<u>Branches</u>	This button is only activated for sites that are part of a head office set-up with a head office and branches. If this button is activated it allows you to view various pieces of information for all of the branches e.g. – SOH, Sales History and costs for particular items depending on rights set from Head Office.
<u>Add Special</u>	Selecting the 'Add Special' button is a shortcut way of being able to access the 'Auto Specials'. This allows you to Add, Edit or Delete an item from being on auto special.
<u>Order Item</u>	Selecting the 'Order Item' button enables you to add items to be ordered via the reorder file. Note: The items will only be added to the reorder file. You need to ensure that when generating an order that you tick ' <u>Add Reorders</u> ' tick box.
<u>Exit</u>	Pressing the 'Exit' button will display a prompt asking 'Are you sure you wish to exit LOTS Stock Cards'. If you select 'Yes' then LOTS Stock Cards will be closed. If unsaved changes exist for the current stock card you will be prompted to save before exiting.

3.10 Creating A Stock Card

To add a new Stock Card:

1. Navigate from the LOTS Start Menu → Stock Cards.
2. From the 'Stock Search' window select 'New Card' (as shown in Figure 144).
3. A screen will be displayed asking you if the stock item will be dispensed as a drug, select the 'Yes' or 'No' button accordingly.
4. A blank stock card will be displayed on the screen. Key in all of the stock information making sure that you key in a PLU, specify a Department and add in all Suppliers and their part codes, as this is essential for ordering purposes.
5. Once you have finished click 'Save' to save the changes.

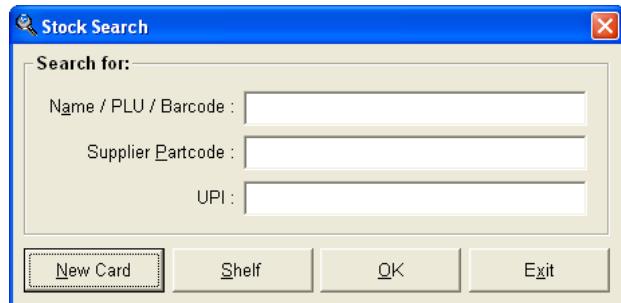


Figure 144

3.11 Copying A Stock Card

In LOTS, you are able to copy the complete contents of any nominated stock card to create a new stock card. This option is very useful when creating a stock card that is very similar to one that already exists.

To copy a Stock Card:

1. Navigate from the LOTS Start Menu → Stock Cards. The 'Stock Search' prompt will display (as shown in Figure 145).
2. Use the search options to find the stock card you wish to copy.
3. The item's stock card information will be displayed on the screen. Select the File drop down menu → Copy Stock Card (as shown in Figure 146).
4. A screen will be displayed informing you that the stock item has been copied (as shown in Figure 147).
5. Once you have selected 'OK', your newly created stock card will be displayed on the screen.
6. Ensure that when you are entering in the new product name description, you remove the word (COPY) from the description.
7. Enter in your stock card details. Ensure that you update the PLU number, the suppliers, their corresponding part codes and barcodes.
8. Once you have finished click 'Save' to save the changes.

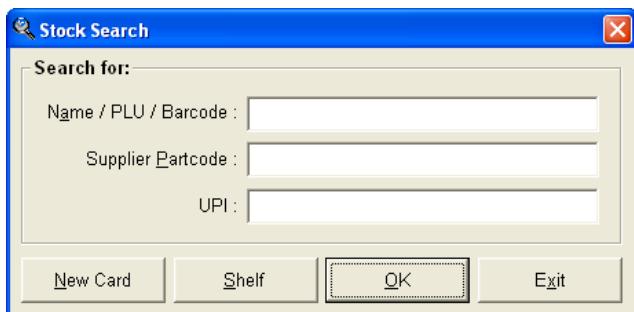


Figure 145



Figure 146



Figure 147

3.12 Producing Shelf Labels For A Stock Card

In LOTS you have the ability to produce a shelf label for any item that has a stock card. To produce a shelf label for a stock card:

1. Navigate from the LOTS Start Menu → Stock Cards.
2. The 'Stock Search' prompt will display (as shown in Figure 148).
3. Use the search options to find the stock card you are after.
4. The items stock card information will be displayed on the screen.
5. Select the 'Shelf Labels' button.
6. A prompt will display telling you that the label has been added to the Label print queue. Select 'OK'.

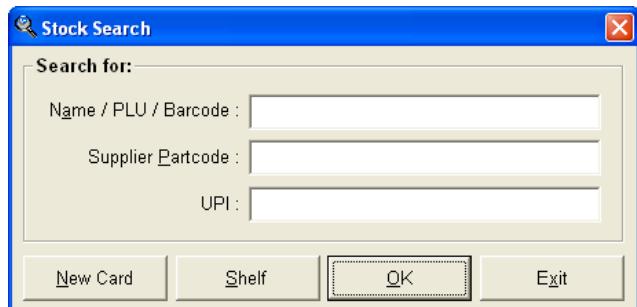


Figure 148



Handy Hint!

This facility enables you to queue multiple shelf labels in the labels printer and only print them out in batches when you wish to, instead of one at a time.

7. To queue additional labels, use the 'Search' button to find the products you are after and select the 'Shelf Labels' button.

3.13 Editing The Shelf Labels Queue

LOTS allows you to edit Shelf Labels before they are printed to save wasting label stationery. The labels can be viewed, and/or deleted directly in the print queue before they are printed. To edit your shelf labels:

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Print Shelf Labels.
2. Your print label queue will now display (see Figure 149).
3. To edit the labels, select the 'Edit' drop down menu at the top of the screen.
4. The available options from this menu are:
 - **Insert [Ins]** – The Insert option inserts shelf labels directly into your shelf label queue.
 - **Delete [Del]** – The Delete option deletes labels from the queue.
 - **Select All [Ctrl+A]** – The Select All option, selects all of the labels in the queue to either delete or print.
 - **Find [Ctrl+F]** – Select Find to find a particular item's listing in the queue.
5. The 'Insert' option, this will display the 'Add to Shelf Label Queue' screen (as shown in Figure 150).
6. Enter in an item description or a barcode to search for a particular item. Select 'OK'.
7. The 'Select An Item' screen will display (as shown in Figure 151).
8. Highlight the items you wish to add to the shelf label queue and select 'Add/Remove'.
9. Once you have selected an item to be added to the shelf label queue it will be displayed in the 'List' tab. The number of items that have been added to the tab will reflect in the name of it.

The screenshot shows a software window titled '7545 items in Shelf Label Queue'. At the top, there is a menu bar with 'Edit', 'Insert', 'Delete', 'Select All', 'Find', and 'Print Selected Labels', 'OK', and 'Cancel' buttons. The main area is a grid table with columns labeled 'Item', 'Pack', and 'Retail'. The table lists various pharmaceutical products with their respective details. The last row of the table shows a total value of '\$63.95'.

Figure 149

The screenshot shows a dialog box titled 'Add to Shelf Label Queue'. It has a text input field labeled 'Enter stock name (Description/PLU/Barcode)' and two buttons: 'OK' and 'Cancel'.

Figure 150

The screenshot shows a software window titled 'Select An Item'. It features a search bar at the top with the placeholder 'Search | 0 Item(s) in List |' and a 'Current Search : ber'. Below the search bar is a grid table with columns labeled 'PLU', 'Tradename', 'Pack', and 'Retail'. The table lists various items, including different types of BEROCCA products. At the bottom of the window, there are buttons for 'Select All', 'Add/Remove', 'Clear List', 'OK', and 'Cancel'.

Figure 151

10. Alternatively, if you wish to remove shelf labels, highlight them in the ‘Search’ tab, and select ‘Add/Remove’ button and the item will be removed from the queue. You will notice that the title of the ‘x item(s) in List’ tab will decrease by one to illustrate that the label has been removed.
11. By pressing the ‘Clear List’ button located (next to the ‘Add / Remove’ button) this will also clear the shelf label list in the ‘x item(s) in List’ tab.
12. Select the ‘OK’ button to return to the ‘Shelf Label Queue’ screen.



Handy Hint!

When you ‘Insert’ items into the shelf label queue they are automatically placed at the bottom of the list.

13. The second option in the ‘Edit’ menu is the ‘Delete’ option. This option deletes shelf labels that are no longer required in the queue (as shown in Figure 152).
14. This can also be utilised by pressing the Delete button on the keyboard.

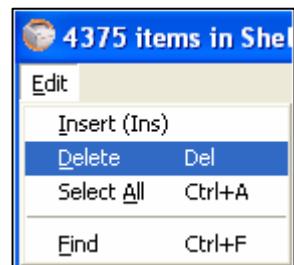


Figure 152



Handy Hint!

Holding down the control or shift keys whilst selecting the items with the mouse, then selecting the ‘Delete’ button allows you to remove multiple items from the shelf label queue quickly.

15. The third option in the ‘File’ menu is the ‘Select All’ option.
16. When using the ‘Select All’ option all items listed in the shelf label queue will be highlighted (as shown in Figure 153).
17. This is useful if you want to print all items in the shelf queue (Select All → Print Selected Labels) or delete all items in the queue (Select All → Delete).
18. The last option in the ‘File’ menu is the ‘Find’ option.
19. Select ‘Find’ and the ‘Find Product in Shelf Label Queue’ screen will display (as shown in Figure 154).
20. Enter in the Description, PLU or Barcode of the product that you wish to search for.
21. Select the ‘OK’ button to begin the search.

4375 items in Shelf Label Queue				
Edit				
PLU	Tradename	Pack	Retail	
1.FUJI SUPERIA 200 135/24 CD		1	\$3.95	
OXYCONTIN CR 40MG T		60	\$131.95	
430447 A/SEARCH AEROCHAMB MASK IFNT		1	\$45.45	
712687 A/SEARCH HIPPO STEAM VAPORIZER		1	\$61.95	
433508 A/SEARCH NEB MASK ADULT SET		1	\$20.95	
433532 A/SEARCH NEB MASK ADULT SNGL		1	\$9.95	
433524 A/SEARCH NEB MASK CHILD SET		1	\$20.95	
433540 A/SEARCH NEB MASK CHILD SNGL		1	\$9.95	
411785 A/SEARCH NEBUCLEAN DSFC500M		1	\$17.45	
433490 A/SEARCH NEBULISER BOWL SGPK		1	\$13.00	
026278 A/SEARCH NEBULISER BOWL TWPK		1	\$20.95	
433557 A/SEARCH NEBULISER TUBING		1	\$9.95	
720417 A/SEARCH PEAK FLOW MET B/ALOW		1	\$37.45	
130526 A/SEARCH VENT FILTER POREX 6		1	\$4.95	
130518 A/SEARCH VENT FILTER PRX/CP6		1	\$6.45	
722447 A/SEARCH VENT NEB MAX		1	\$311.95	
206001 LABDOSE LIN CHG P.25ML 10PML		1	\$7.00	

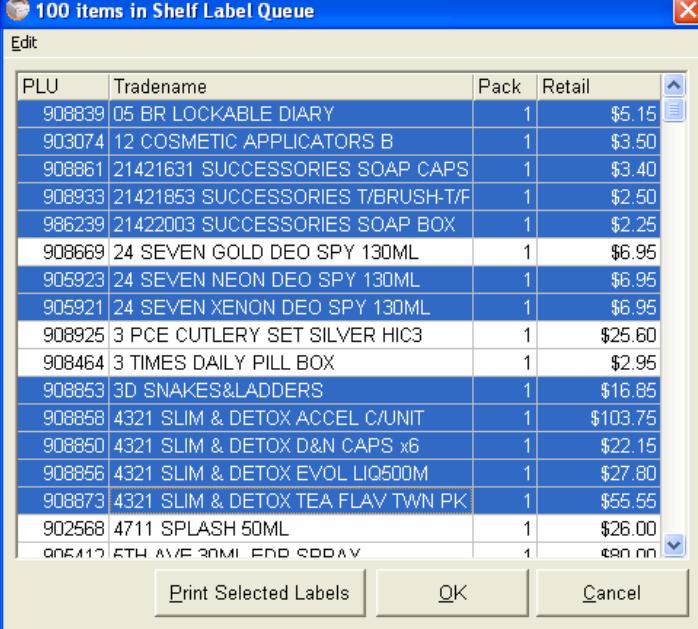
Figure 153

Find Product in Shelf Label Queue	
Enter Product to search for (Description/PLU/Barcode)	
OK	Cancel

Figure 154

3.14 Printing Shelf Labels From The Shelf Label Queue

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Print Shelf Labels.
2. Before printing shelf labels from this location you must select the items in the queue before printing them out (see Figure 155).
3. You can make multiple selections by using the [Control] key. This enables you to select items that aren't consecutive. The [Shift] key enables you to select items that are consecutive (shown right). Alternatively you can select all the labels by Edit → Select All.



The screenshot shows a Windows application window titled "100 items in Shelf Label Queue". The window has a toolbar with a magnifying glass icon and a "Print" button. Below the toolbar is a table with four columns: PLU, Tradename, Pack, and Retail. The table lists various items with their respective details. Some items are highlighted in blue, indicating they are selected. At the bottom of the window are three buttons: "Print Selected Labels", "OK", and "Cancel".

PLU	Tradename	Pack	Retail
908839	05 BR LOCKABLE DIARY	1	\$5.15
903074	12 COSMETIC APPLICATORS B	1	\$3.50
908861	21421631 SUCCESSORIES SOAP CAPS	1	\$3.40
908933	21421853 SUCCESSORIES T/BRUSH-T/F	1	\$2.50
986239	21422003 SUCCESSORIES SOAP BOX	1	\$2.25
908669	24 SEVEN GOLD DEO SPY 130ML	1	\$6.95
905923	24 SEVEN NEON DEO SPY 130ML	1	\$6.95
905921	24 SEVEN XENON DEO SPY 130ML	1	\$6.95
908925	3 PCE CUTLERY SET SILVER HIC3	1	\$25.60
908464	3 TIMES DAILY PILL BOX	1	\$2.95
908853	3D SNAKES&LADDERS	1	\$16.85
908858	4321 SLIM & DETOX ACCEL C/UNIT	1	\$103.75
908850	4321 SLIM & DETOX D&N CAPS x6	1	\$22.15
908856	4321 SLIM & DETOX EVOL LIQ500M	1	\$27.80
908873	4321 SLIM & DETOX TEA FLAV TWN PK	1	\$55.55
902568	4711 SPLASH 50ML	1	\$26.00
905412	ATH AWF 30ML FND SODA V	1	ea n/a

Figure 155

4. Once you have highlighted the required shelf labels, select the 'Print Selected Labels' button.
5. A progress bar will display showing time to send job to the printer. The actual printing may take some time.
6. When the shelf labels have printed, a screen will display asking if you wish to 'Remove Selected Labels from the Shelf Label Queue'.
7. Select 'Yes' only if the labels have printed successfully and you don't require any additional copies of the shelf labels.
8. Select 'No' if you want to reproduce the last batch of labels that have been printed as they are still available in the shelf label queue.
9. Select 'OK' to save your changes to the shelf label queue.

3.15 Useful Wildcard Searches Within LOTS

LOTS has the ability to use symbols in its search criteria to help find products that cannot be easily found.

3.15.1 Using The # Symbol When Searching For Products

When searching for products in LOTS, by using the hash symbol (#) you will be able to search for all Stock cards that have a numeric prefix in the product name.

1. From the Stock Search Screen, type in a '#' symbol into the description field (as shown in Figure 156).
2. Select 'OK' to begin the search.
3. Your search results will display with all products that contain numbers at the start of the descriptions (as shown in Figure 157).

Note: This wildcard search can also be used in the Sales Module when searching for products and orders.

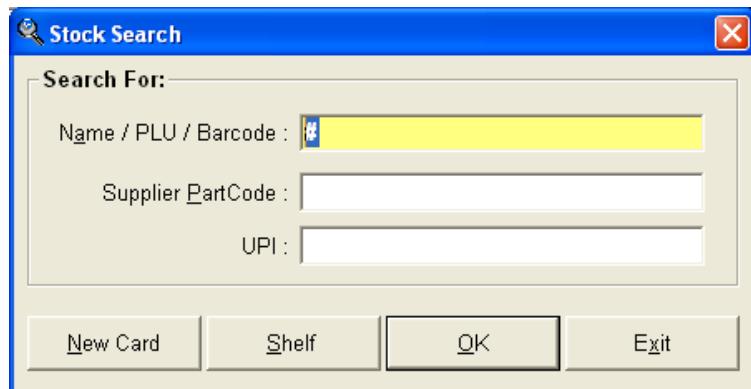
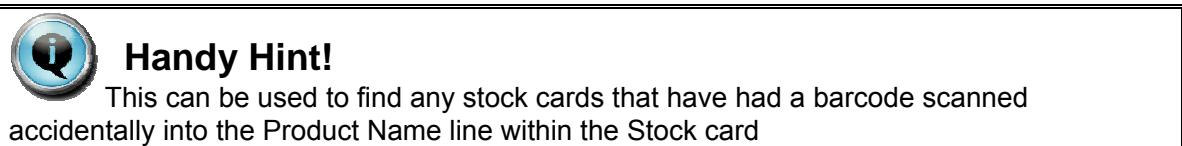


Figure 156

Select an Item from the list below							
PLU	Name	Pack	Manu.	List Cost	Real Cost	Retail	SOH
1	908852 05 BOOK CHAIN B/FLX6	1	GUARDI	15.90	0.00	24.50	2
2	909007 05 BOOK CHAIN HRTX6	1	GUARDI	15.90	0.00	24.50	2
3	908839 05 BR LOCKABLE DIARY	1	GUARDI	3.36	0.00	5.15	2
4	909004 05 CARRARA FRAME LND	1	GUARDI	8.90	0.00	13.75	2
5	908943 1000 HOUR EYELASH DYE 24PCE	1	DOWAR	252.48	0.00	388.85	2
6	908942 1000 HOUR EYELASH DYE 32PC	1	DOWAR	336.64	0.00	518.45	2
7	905357 1000 HOUR EYELASH DYE BLA	1	DOWAR	10.88	0.00	16.80	2
8	905340 1000 HOUR EYELASH TINT BL	1	DOWAR	10.88	0.00	16.80	2
9	903074 12 COSMETIC APPLICATORS B	11	DOWAR	1.82	0.00	3.50	2

Figure 157



3.15.2 Using The % Symbol When Searching For Products

By using the % symbol in your product searches it will display all products that contain the criteria that you put after the symbol. For example if you type in %Gift then the search will be reduced to all items that have the word *gift* anywhere in their description.

1. From the Stock Search Screen, type in a '%' symbol into the description field. Type in the criteria afterwards that you would like to search for. As an example we will search for all description that contain 'gift' (as shown in Figure 158).
2. Select 'OK' to begin the search.

3. The search results will display listing all products that contain the word 'gift' in them (as shown in Figure 159).

Note: This wildcard search can also be used in the Sales Module when searching for products and orders.



Figure 158

Select an Item from the list below							
PLU	Name	Pack	Manu.	List Cost	Real Cost	Retail	SOH
1 908472	AMCAL GIFT	1		9.10	0.00	16.05	2
2 762047	AVEENO GIFT PACK	1	J & J OT	14.97	0.00	23.05	2
3 907957	BABY GIFTS & ACCESSORIES	1		5.93	0.00	8.90	0
4 983188	BABY GIRL GIFT SET W/FRAME AND	1	3P PTYL	8.64	0.00	13.30	2
5 907967	GIFT	1		9.37	0.00	14.05	0
6 908650	Gift Voucher	1		1.00	0.00	1.55	0
7 904256	IN DREAMS BST GIFT	1	INNOXA	9.08	0.00	15.00	2
8 907974	INNOXA GIFT	1		12.17	0.00	20.10	0
9 908404	LEWINNS 24 HOUR GIFT SET D	1		80.83	0.00	124.50	-1

Figure 159

3.15.3 Using The * Symbol When Searching For Products

The asterisk wildcard search has exactly the same functionality as the % wildcard search. By placing an * in the search field (as shown in the steps above) and writing a word or number after the * then the search results will display anything with that criteria in the description.

Note: This * wildcard search cannot be used in the Sales module like the other wildcard searches because the * is actually used as the Scriptlink key. Use the % sign to perform a wildcard search in the sales module

3.15.4 Using a _ Symbol when searching for missing characters

The ‘_’ symbol allows you to search for missing characters from a word. For example if you type in ‘_moxil’ then the search will be for all items that have ‘moxil’ in their description.

1. From the Stock Search

Screen, type in a ‘_’ symbol into the description field. Type in the criteria afterwards that you would like to search for. Using the above example, we will search for descriptions that have ‘moxil’ in them (as shown in Figure 160).

2. Select ‘OK’ to begin the search.

3. The search results will display listing all products that contain the string ‘moxil’ in the description (as shown in Figure 161).

Note: This wildcard search can also be used in the Sales Module when searching for products.

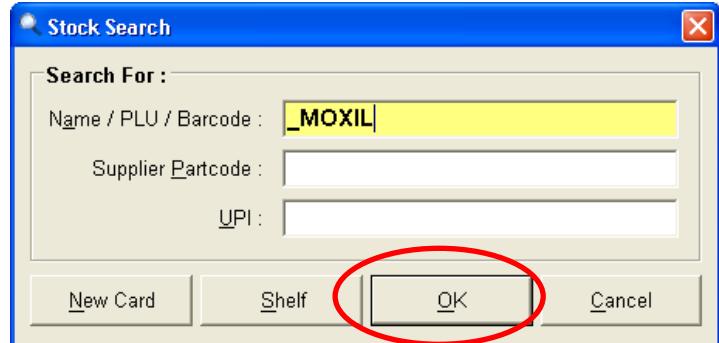


Figure 160

A screenshot of a grid-based search results window. The title bar says 'Select an item from the list below'. The grid has columns for PLU, UPI, Name, Pack, Manu, List Cost, Real Cost, SOH, and Retail. The first few rows show items like 'AMOXIL 250MG C', 'AMOXIL 250MG T', and 'AMOXIL 500MG C'. A legend at the bottom left indicates: Drugs (black square), Inactive Stock (red square), and Active Stock (blue square). A note at the bottom center says: 'Use the Up and Down arrow keys to scroll. Press F3 to select an item. Select PgUp for next group.' The 'OK' and 'Cancel' buttons are at the bottom right.

PLU	UPI	Name	Pack	Manu	List Cost	Real Cost	SOH	Retail
1	011634	40 AMOXIL 250MG C	20	GLAVO S...	\$2.22	\$2.49	1497	\$2.90
2	225177	45 AMOXIL 250MG T	20	GLAVO S...	\$3.04	\$3.18	0	\$3.95
3	335499	41 AMOXIL 500MG C	20	GLAVO S...	\$3.82	\$4.28	4205.1	\$4.95
4	164749	43 AMOXIL DFS 100MG/5ML 20ML	1	GLAVO S...	\$3.96	\$4.13	74	\$5.15
5	640007	6949 AMOXIL DUO 1000MG T	14		\$6.42	\$6.29	178	\$8.35
6	011767	45 AMOXIL FORTE SYR 250MG/5ML 100M	1	GLAVO S...	\$2.89	\$3.00	208	\$3.75
7	831719	42 AMOXIL INJ 1GM	10		\$26.98	\$12.89	0	\$40.45
8	096694	2168 AMOXIL POWDER SACHET 3GM	1	GLAVO S...	\$2.20	\$2.29	734	\$3.10
9	011676	44 AMOXIL SYRUP SF 125MG/5ML 100ML	1	GLAVO S...	\$2.33	\$2.43	214	\$3.05

Figure 161

3.16 Merging Duplicate Stock Cards

'Merge Duplicate Stock' is a program whereby you can merge two duplicate stock cards in your database. You can search for duplicate stock cards that have the same PLU (Price Look up Number), Partcode or Description. Alternatively you may manually select two cards to merge.

It is recommended that you perform the 'Merge Duplicate Stock' utility on a weekly or fortnightly basis to maintain your stock cards efficiency and save yourself time.

Note: The 'Merge Duplicate Stock' program can ONLY be performed on the LOTS Master.

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Merge Duplicate Stock.

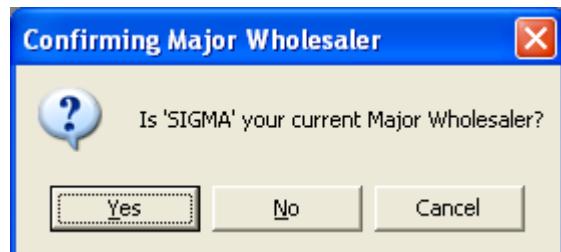


Figure 162

2. The 'Checking Major Wholesaler' screen will appear (as shown in Figure 162). If the wholesaler shown is your major one, select the 'Yes' button.

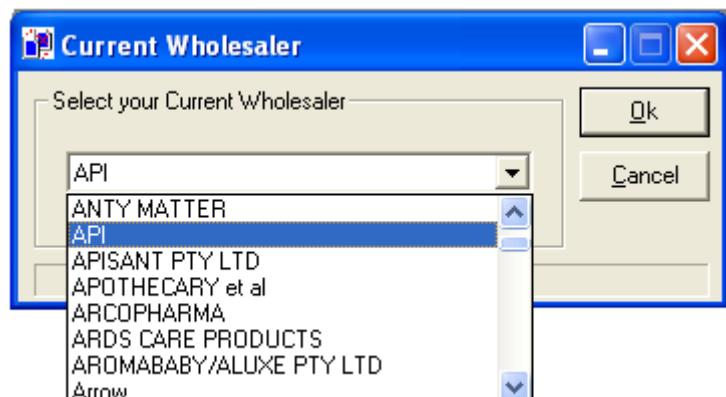


Figure 163

3. If the wholesaler shown is not your major wholesaler, select 'No'.

4. After selecting 'No', select a wholesaler by using the drop down list (as shown in Figure 163). Select your major wholesaler from the list then select the 'OK'.

5. Once again you will be asked to confirm that your selected wholesaler is the correct one.

6. The 'Options' window will be displayed (see Figure 164). Select which option you wish to merge by. LOTS will search for duplicate:

- **PLU** – Price LookUp number, usually your main wholesaler.
- **Partcode** – Allows you search by PDE of all wholesalers.
- **Description** – This generates a list of items that have duplicate product names.
- **Stock Items** – Allows you to manually select two stock items to merge.

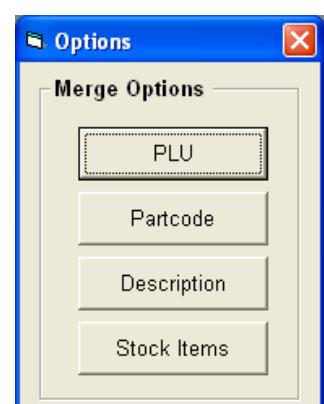


Figure 164

Note: For the below example we are going to assume that the merge option selected was 'PLU'.

7. Once your desired criteria is selected the 'Cards with Duplicate PLU' screen will be displayed (as shown in Figure 165).

PLU	Name	SOH	MTD	Retail	Pack Size	Auto	Manual
053449	PV CARPINE 3% EYE DROPS 15ML	1	0	11.40	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
053449	DISC SHIS STM DISTINGUISH MASCARA D3	0	0	15.00	1	<input type="checkbox"/>	<input type="checkbox"/>
057517	WATER FOR INJECTION 5ML (AP)	0	0	9.87	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
057517	WATER FOR INJ P/A 5ML 5 4533	-1	0	2.10	1	<input type="checkbox"/>	<input type="checkbox"/>
061689	JOBST SHEER T HI BGE SML 119377	0	0	73.25	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
061689	JOBST SHEER T HI BGE XLG 119380	0	0	73.25	1	<input type="checkbox"/>	<input type="checkbox"/>
066761	FONGITAR LIQ SCALP CLEANS. 150ML	0	0	14.55	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
066761	ATHL SUSPENSORY 15 MED SUPREME	0	0	17.70	1	<input type="checkbox"/>	<input type="checkbox"/>
077429	THERMOMETER BASAL FERTILITY BD	0	0	17.05	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
077429	LYNX DEO COLOGNE 100G VOODOO	0	0	5.95	1	<input type="checkbox"/>	<input type="checkbox"/>
087866	CODRAL ORIGINAL COUGH COLD+ FLU CAP 24	22	0	13.45	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
087866	PROTEC VIT E CREAM 250G	0	0	9.95	1	<input type="checkbox"/>	<input type="checkbox"/>
095141	RIMOSTIL TAB 30 DISCONTINUED	0	0	30.65	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
095141	CATHETER 18FG 5CC SILASTIC	0	0	18.90	1	<input type="checkbox"/>	<input type="checkbox"/>

Merge Options

Figure 165

8. This screen lists all stock cards that contain duplicated PLU's. You have the option to choose to automatically or manually merge the stock cards. The stock card that is to be retained appears in the white lines, whilst the stock card that is to be deleted will appear in the grey lines.

By default any duplicates where both stock cards have zero stock on hand, will be ticked to merge automatically whilst where one or both are active the 'Manual' option is selected. Tick the auto or manual columns if desired to select which stock cards you would like merged automatically or manually. Alternatively select the 'All Auto' or 'All Manual' buttons.

Note: It is generally recommended to merge manually allowing your input into the merge process. Tick 'All Manual' to opt to perform all merges manually (refer to section: **3.16.2 – Manually Merge**).

Note: Only duplicates that can be merged will be displayed here, hence the count of duplicates may differ from what's reported in the 'Unusual Stock Cards' report (for more info refer to section: **10.7 – Unusual Stock Cards**).

3.16.1 Automatically Merge

1. Select the cards you wish to merge automatically by placing a tick in the 'Auto' tick box. To merge all duplicates automatically select 'All Auto'.
2. To continue select the 'Proceed' button the following window will appear (see Figure 166).
3. In the 'Auto Mode' window every field will have the 'Keep Retain' tick box ticked by default. This means that you wish to keep the details of the card that will be retained (white line).
4. If you prefer to retain the details of a field of a deleted card (grey line) you can change the tick from 'Keep Retain' to 'Keep Delete' for that field (remembering this will apply to all cards). For example: in Figure 139 the 'Product Sub Group' and 'Order Size' fields will be retained from the deleted card for every stock cards marked as 'Auto'.
5. To proceed select 'Merge', a list of all the items merged will be displayed on the screen. This list can be printed if desired.

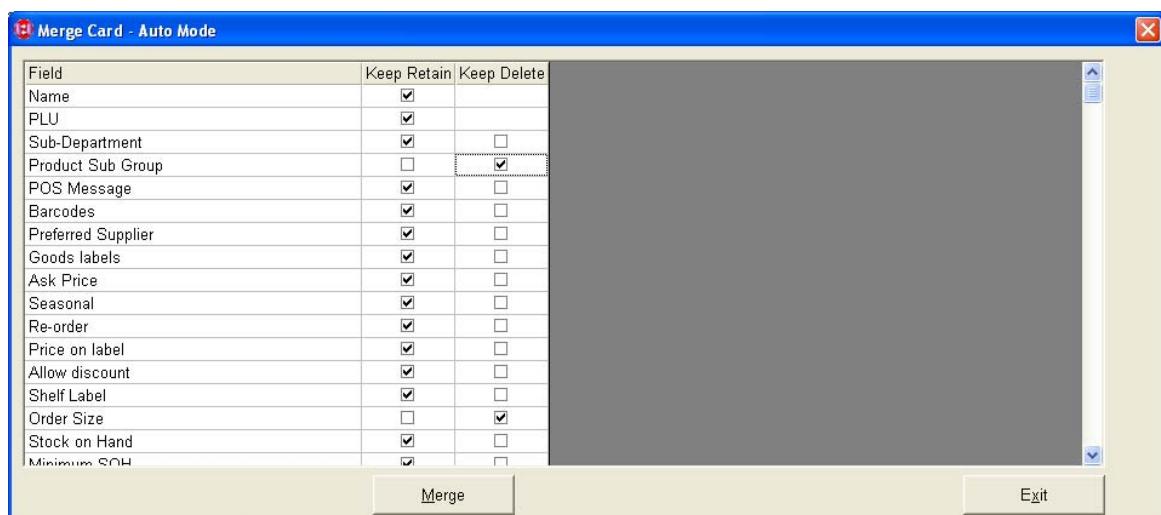


Figure 166

3.16.2 Manually Merge

1. For all the cards selected as 'Manual' the following window will appear (see Figure 167).
2. In the 'Manual Mode' window you have more options, and each change you make will only apply to that particular stock card.
3. The options allow you to:
 - Overriding the retained card's value by adding a new value ('New Value' field).
 - Combine the two fields together.
 - 'Switch Cards' (this will swap the cards, so that the Delete Card's values will now be retained and vice-versa).
 - Skip, do nothing to the duplicated cards and move to the next pair of duplicates.



Figure 167

4. Once you have chosen the information you would like to retain select 'Merge'. The cards will then be merged and the next two duplicated cards will be displayed.

Note: Once you merge a card it can't be undone, but if you 'Skip' a card you can return to it by selecting 'Back'. Selecting back will return you to last duplicated card you skipped, you can keep selecting back until you return to the first duplicated cards you skipped.

5. Once you have finished with your session select 'Exit'. A report will be generated displaying all the products that were merged in that session. You will have the ability to print out the report if you wish as you may wish to check stock on hand and price information on the merged cards.

Note: A 'Rolling Stocktake' is automatically created containing these items (for more information refer to section: **9.1 – Rolling Stocktake**).

3.17 Stock Card Options

The ‘Stock Card Options’ utility enables you to perform group changes for stock card flags. These changes can be performed for nine of the different stock card options.

You are able to filter your criteria by Department, Sub Department, Product Sub Group, Stock Group, Supplier, Item Name and/or stock items with or without a Barcode.

1. Navigate from the LOTS Start Menu to Tools → Utilities → Stock Utilities → Stock Card Options.

2. The ‘Setting Flags’ screen will be displayed (as shown in Figure 168). This is where you set flags for all the stock card options.
3. Use the filters to allow you to set flags for a specific group of stock cards.
4. The flags relates to your Stock Flags tab in Stock Cards (see Figure 169).

5. Once you have set your filters select the flag you wish to change. Then click ‘Search’.
6. The ‘Setting Flags’ window will be displayed (see Figure 170). Select ‘Change All To ‘Yes’ or ‘Change All To ‘No’, depending on what you want the stock cards flag set to.

Note: ‘YES’ will tick the stock flag option in the Stock Flags tab in Stock Cards, while ‘NO’ will untick the stock flag option.

7. A notification will be displayed (as shown in Figure 171) indicating that the process has been completed and it will display the number of stock cards that have been changed.
8. Clicking the ‘OK’ button will return you back to the ‘Setting Flags’ screen.

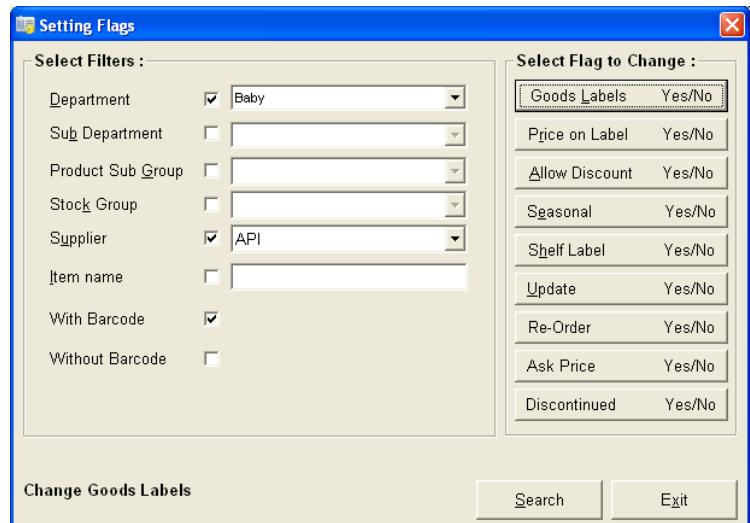


Figure 168



Figure 169

Setting Flags (4636 items)							
Trade Name	PLU	Department	Sub Department	Barcode	Labels		
ANGEL XMAS DECORATIONS SILVER	782914	XMAS DECORATIONS	XMAS DECORATION	No	YES		
ANGOLA SHOPPING BAG BROWN	798101	acland holdings	acland holdings	No	YES		
ANGOLA SHOPPING BAG GREY	798102	acland holdings	acland holdings	No	YES		
ANGORA GLOVES BLK BEG LILA CLAR CI	797372	handbags/scavens/gloves	handbags/scavens/glc	No	YES		
ANGORA SCARF BLK BRN BEIGE S342BL	797370	handbags/scavens/gloves	handbags/scavens/glc	No	YES		
ANGORA SCARF CHAR PLUM PALE BRN	797371	handbags/scavens/gloves	handbags/scavens/glc	No	YES		
ANGORA SCARF PINK/AQUA/HOT PINK	797568	handbags/scavens/gloves	handbags/scavens/glc	No	YES		
ANIMAL FACE PURSES	785774	Baby	Baby	No	YES		
ANISEED OIL BP 25ML	488720	Ethicals	Ethicals	No	NO		
ANSELL EXAM TECH GLOVE LATEX LGE	770382	Surgical Sundries	Surgical Sundries	No	YES		
ANSELL EXAM TECH GLOVE LATEX MED	770381	Surgical Sundries	Surgical Sundries	No	YES		
ANSELL EXAM TECH GLOVE LATEX SML	770380	Surgical Sundries	Surgical Sundries	No	YES		
ANSELL NITRA TEX GLOVES P/F LGE	790577	Surgical Sundries	Surgical Sundries	No	YES		
APIDRA PENFILL 100U 3MLX5		Ethicals	Ethicals	No	NO		
APO-AMOXICILLIN 250MG C		Ethicals	Ethicals	No	NO		
APO-AMOXICILLIN 500MG C		Ethicals	Ethicals	No	NO		
APOMINE 10MG/ML INJ	789719	Ethicals	Ethicals	No	YES		
APOMORPHINE INJ 10MG 1ML (MX)	871540	Ethicals	Ethicals	No	YES		
APO-TRANDOLAPRIL 500MG C		Ethicals	Ethicals	No	NO		
APO-TRANDOLAPRIL 1000MG C		Ethicals	Ethicals	No	NO		

Figure 170



Figure 171

3.18 Modify Departments

The Modify Departments module allows you to add, move, edit and delete department and sub-departments. When you select a department/sub-department all the products stored in that department/sub-department will be displayed on the screen.

3.18.1 Move Products Between Sub-Departments

1. Navigate from the LOTS Start Menu select Tools → Utilities → Stock Utilities → Modify Departments.
2. The ‘Modify Department/Sub-Department’ window will be displayed (as shown in Figure 172).

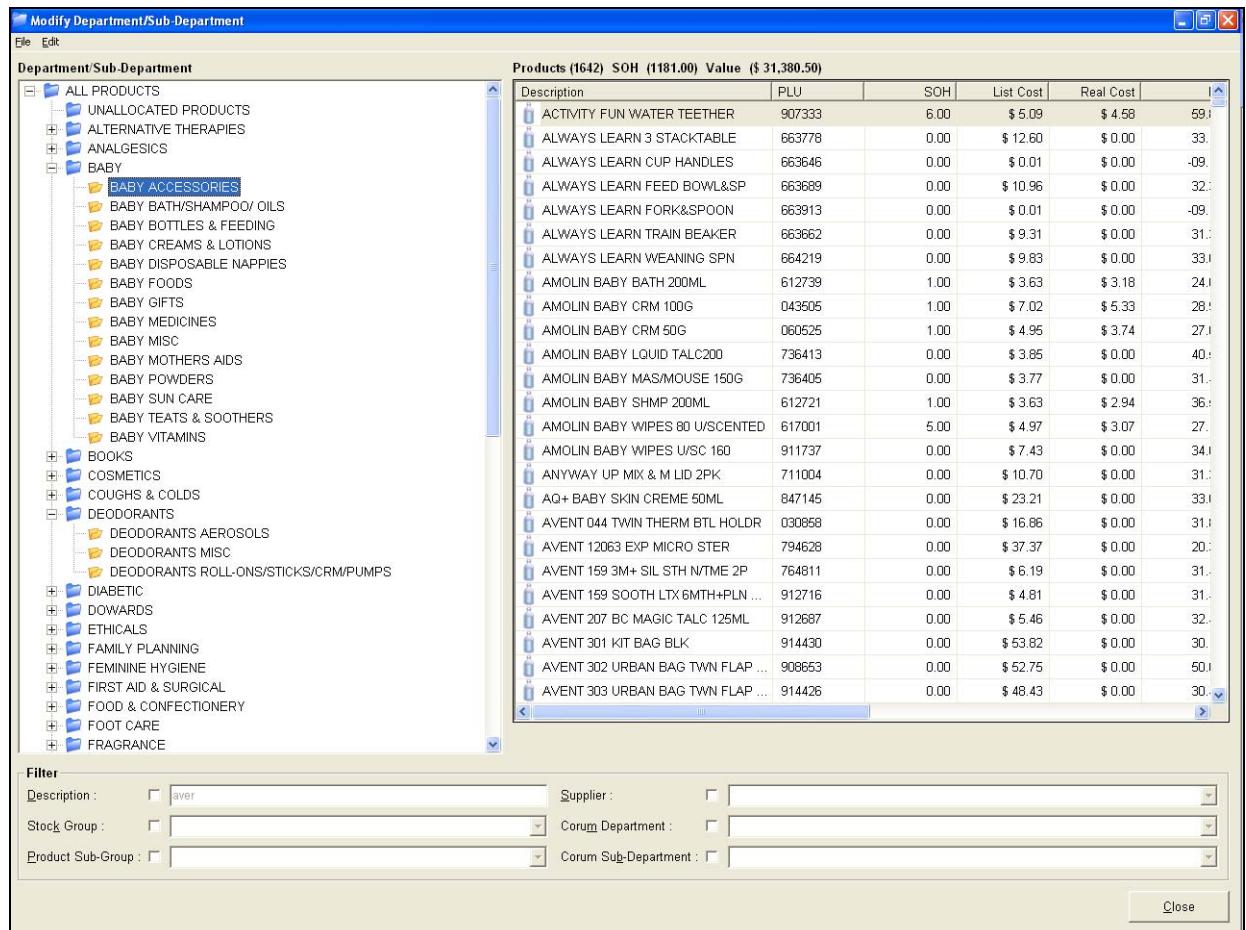


Figure 172

3. Select the sub-department you wish to move products from.
4. Highlight the products you wish to move then drag and drop them into the sub-department you wish them to be placed in.

Note: You can also use ‘Cut’ (Ctrl+X) and ‘Paste’ (Ctrl+V) options from the ‘Edit’ drop-down menu or by right clicking on the product (see Figure 173).

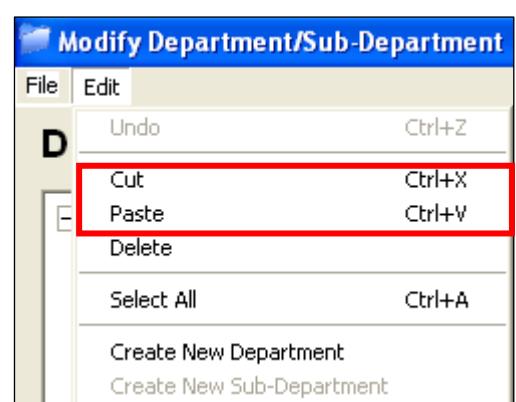


Figure 173

3.18.2 Add/Edit Department/Sub-Department

1. To add or edit a department/sub-department navigate from the LOTS Main Menu → Tools → Utilities → Stock Utilities → Modify Departments.
2. To add a new department or sub-department select 'Create New Department' or 'Create New Sub-Department' depending on the one you want to create (see Figure 174).

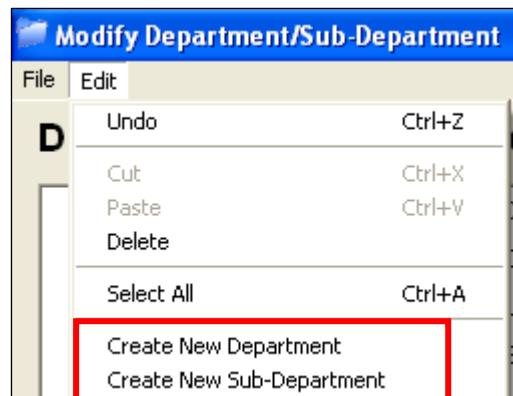


Figure 174

Note: You can also right click in the 'Department/Sub-Department' window and select 'New → Department' or 'New → Sub-Department' (see Figure 175).

3. To rename a department or sub-department right click on the department/sub-department select 'Rename' and then type over the text (see figure 176).

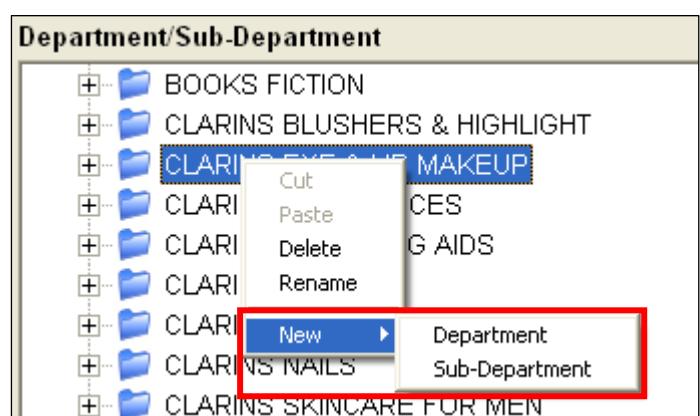


Figure 175

4. To move a sub-department highlight the sub-department you wish to move then drag and drop it over the department you wish it to be placed in.
You can also use the cut and paste options by right clicking on the sub-department.

Note: Moving a sub-department will also move the products located within it.



Figure 176

3.18.3 Add/Edit Department/Sub-Department

1. To delete a department/sub-department navigate from the LOTS Main Menu → Tools → Utilities → Stock Utilities → Modify Departments.
2. Highlight the department or sub department you wish to delete and select 'Delete' from the 'Edit' drop-down menu (see Figure 177).

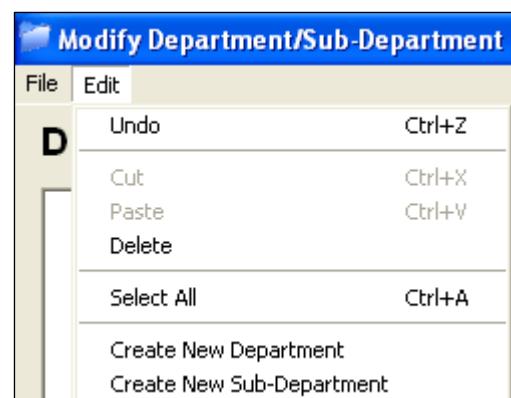


Figure 177

Note: You can also right click in the 'Department/Sub-Department' window and select 'Delete' (see Figure 178).

3. If you wish to delete a department you must remove all sub-departments from the department before it can be deleted (see figure 179).
4. Also all products must be removed from a sub-department before it can be deleted.

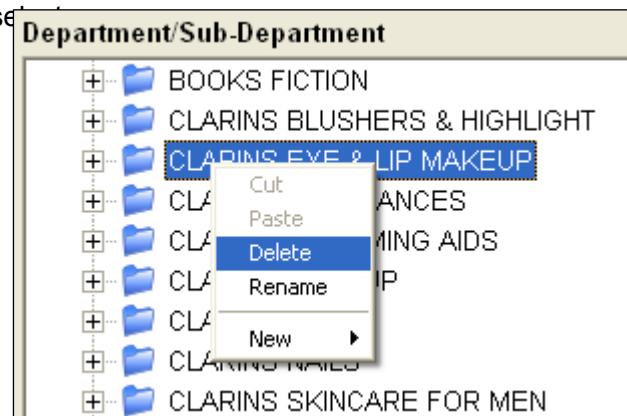


Figure 178

Note: Products cannot be deleted only moved from one sub-department to another.



Figure 179

3.18.4 Modify Department Filters

The filters in this module are very powerful and can be very helpful when moving products between departments/sub-departments.

The filters also allow you to narrow down the products that you are displaying for a certain department/sub-department. For example if you are viewing the 'Baby' department/sub-department, by typing 'AVENT' in the 'Description' filter will limit the list to just 'AVENT' products in the Baby department/sub-department.

3.19 Storage Locations

The functionality exists in LOTS to be able to allocate physical location identifiers to stock within the store, these identifiers are known as 'Storage Locations'. Storage location (codes) can be printed on dispensary labels for easy of stock location.

3.19.1 Setting Up Storage Locations & Allocating Products To Them

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Storage Locations.
2. This will display the 'Storage Locations' window (as shown in Figure 180).

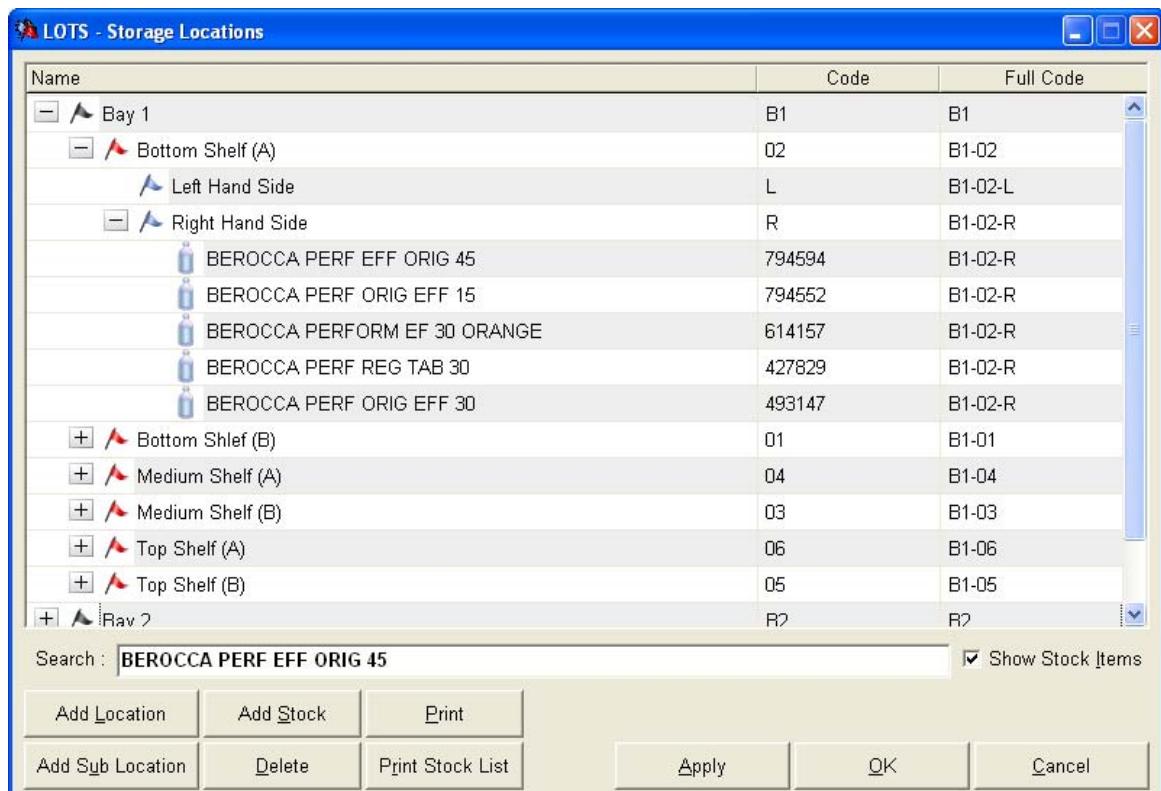


Figure 180

3. You can have up to four location levels.
4. To add a location select 'Add Location' this will create a new location at the top level and allow you to type in a name.
5. You will also need to add in a code for the location. The codes refer to how the location will be displayed in dispense, for example, or printed on dispense labels. For this reason its best to keep the codes as short as possible like the example above. The 'Full Code' field is automatically generated. The Full Code field lists the codes of each level separated by a dash (see Figure 180).
6. To add a sub location, highlight the level you want the sub-location to appear under, then select 'Add Sub Location'.
7. Once you have set up your locations you can add stock. Select the location and then select 'Add Stock'.

8. Selecting Add Stock will open up the 'Stock Search' window (as shown in Figure 181).

9. Use the filters to help select the product you are after. Once added they will show up under the location.

10. To print a list of the locations select 'Print'.

11. If you want to print a list of the locations and the stock associated with them, select 'Print Stock Listing'.

12. Selecting Print Stock Listing will ask you to chose the level of detail (see Figure 182), either:
 - **No Breakdown** – This will show each product and its SOH, Max Qty, Facing and Unique Code.
 - **By Sub Location** – This will show each product and its SOH, Max Qty, Facing and Unique Code by sub location.

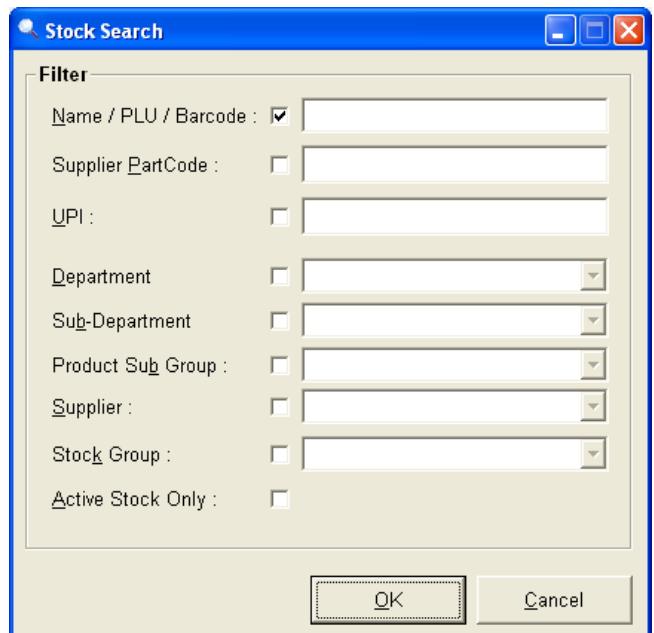


Figure 181

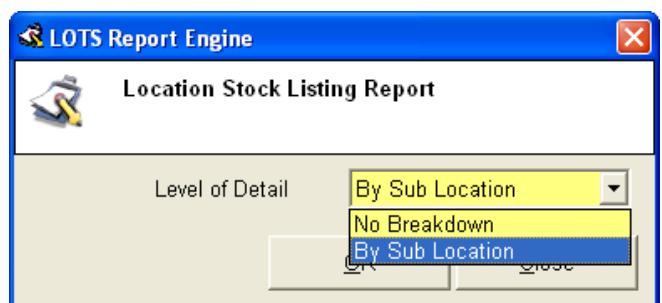


Figure 182

3.19.2 Applying A Stock Locations To A Stock Card

You can also set up the code of the item in Stock Cards.

1. Navigate to Stock Cards via LOTS Start Menu → Stock Cards.

2. When in Stock Cards search for the product and go to the '2 Stock Flags' tab.

3. In the Location section of the tab (Figure 183) click on the plus symbol (+).

4. Clicking on the plus symbol will display the 'Location Search' window, and will prompt you to enter in the location of where you want the product allocated to.

Note: If you wish you can add multiple locations to the one stock card. You can remove a location by highlighting the location and selecting the minus symbol (-).

Locations					
Location Code	Facing	Max Qty	Position	+	-
FS-06	1	1	0		

Figure 183

3.19.3 Storage Locations – Dispensary Benefits

1. The location code will be shown in the script screen when dispensing a script (as shown in Figure 184).
2. The storage location code can be added to script labels to help staff who might not be familiar with the store layout.

Note: For more information on how to configure dispensary labels to include location codes refer to section: **3.19.4 – Adding The Storage Location Code To Script Labels.**

The screenshot shows a software interface for dispensing a prescription. At the top, there are two radio buttons: 'Trade name' (selected) and 'Generic name'. Below this, the 'Drug' field contains 'AMOXIL 250MG C'. The 'Quantity' field is set to '20' and the 'Price' is '\$13.60'. A button 'Add Intervention (Ctrl-V)' is located to the right. The 'Instructions' field is empty. Under 'Prescription Details', 'Total Repeats' is set to '0' with a note 'Max (1)'. The 'Comments' field is empty. In the 'Dispenser' section, 'Staff' is listed as 'Corum Health', 'Schedule' is '4', and 'PDE' is '707457'. There is a checkbox 'Charge to Account' which is unchecked. The 'SOH' field shows '-105'. The 'Location' field at the bottom right is filled with 'FS-06' and is highlighted with a red rectangular border.

Figure 184

3.19.4 Adding The Storage Location Code To Script Labels

1. To modify script labels so that the storage location code appears on them navigate from the LOTS Start Menu → Tools → Printer Setup.
2. Ensure the ‘Script Labels’ option is selected and then click ‘Advanced...’ this will display the ‘Dispensary Label Layout’ window (as shown in Figure 185).

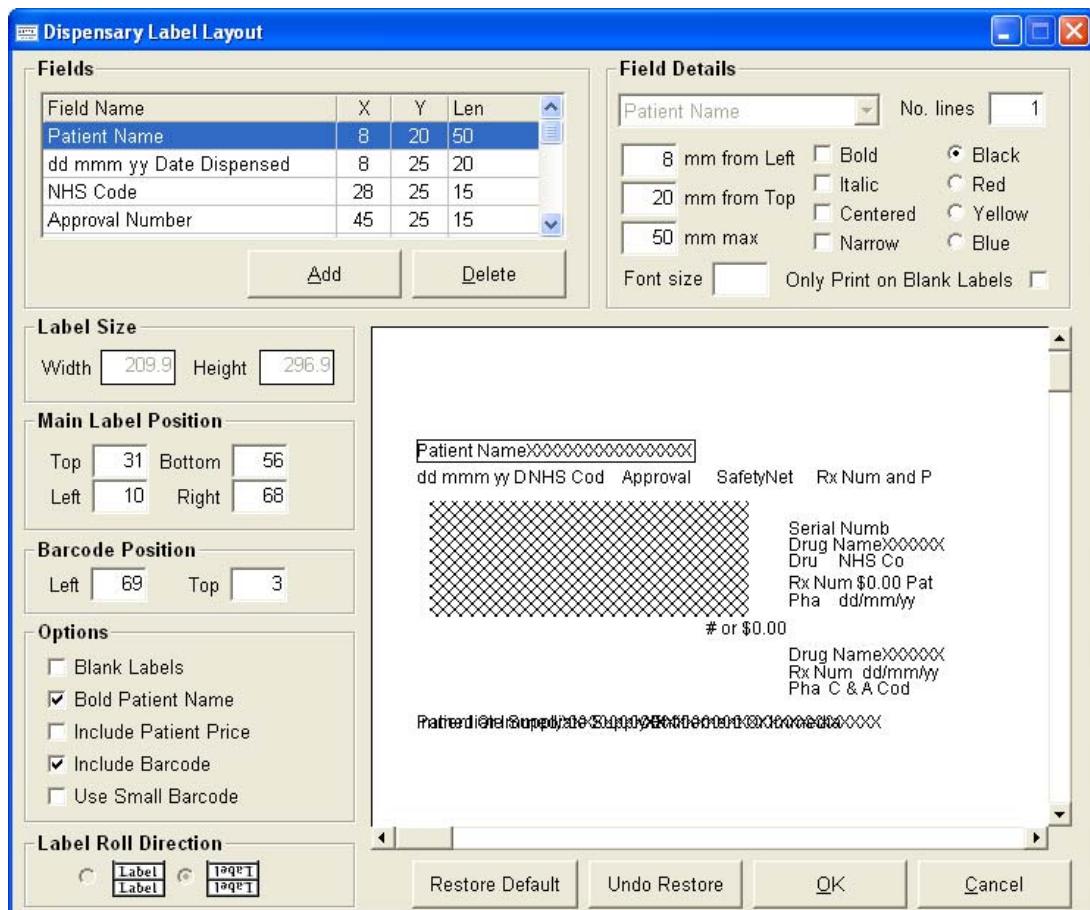


Figure 185

3. In the ‘Fields’ section of the window select ‘Add’.
4. Clicking ‘Add’ will create a blank row in the Fields section and clear out all values in the ‘Field Details’ section.
5. From the Field Details drop down menu select ‘Storage Location’ (See Figure 186).

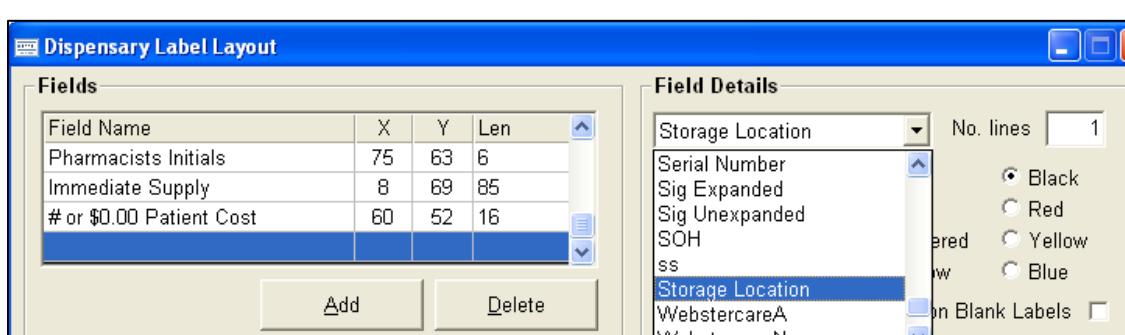


Figure 186

Note: The fields listed in the drop down menu are in alphabetical order.

6. After selecting 'Storage Location' you will need to enter in the following information (see Figure 187):
 - 62 mm from Left
 - 55 mm from Top
 - 10 mm max

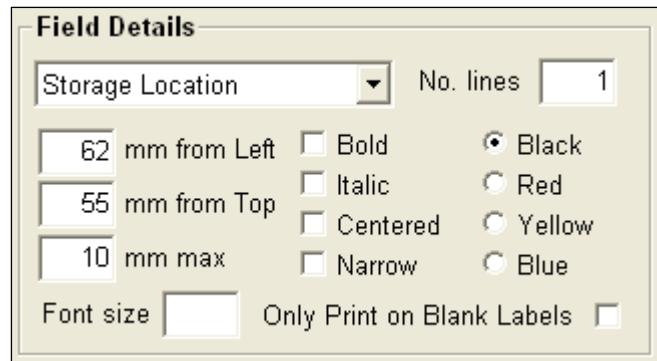


Figure 187

7. Ensure 'Black' is checked.

Note: The above values are just a guide and may vary depending on your labels.

Note: It is not compulsory to place the storage location on the label, and if you do it, it may be removed at any time by highlighting the row in the Fields section and selecting 'Delete'. It is not recommended to add the storage location code to the main label. It is more useful when added to the duplicate sticker, for example, and is used as an aid to assist with quickly locating dispensary stock.

4 Utilities

The Utilities module in LOTS, gives operators advanced functionality to work in conjunction with the LOTS Stock Cards Modules. Features include, Bulk Stock Cards Changes, Special Pricing, Labelling functionality and much more!

4.1 Group Price Changes

The Group Price Changes utility enables you to make group changes of prices. These can be performed for changing markup %, changing retail by %, rounding retail prices and changing prices for list cost, real cost and retail.

Use the search criteria to filter for the item you wish to change.

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Group Price Changes.
2. This will display the 'Group Price Changes' window (see Figure 188).
3. Use the 'Search Criteria' options to define the products you wish to change, then use the 'Price Change Options' to define what price changes you want to make.
4. For example if you wanted to change all 'Berocca' products to have a retail of \$12.95 you would tick the 'Item Name' tick box and type in "Berocca". You would then select the 'Change Prices' option and then set 'Retail' to \$12.95, (see Figure 188).
5. Select the 'Search' button.
6. A screen will be displayed (as shown in Figure 189) listing all items that will be changed according to the criteria you have selected.

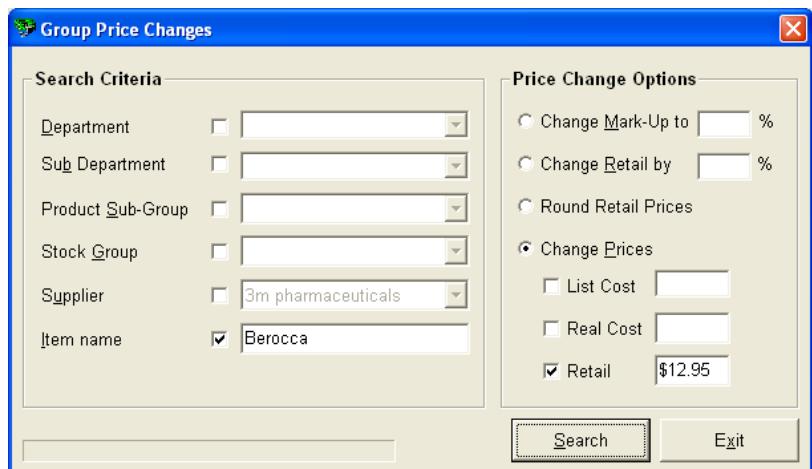


Figure 188

Group price change for 6 Items of stock									
PLU	TradeName	List	Real	Mk Up.	Retail	New Mk	New Retail	Change?	
794594	BEROCCA PERF EF	\$19.14	\$16.37	4	\$21.95	-39	\$12.95	<input checked="" type="checkbox"/>	
794552	BEROCCA PERF OF	\$7.80	\$6.49	16	\$9.95	51	\$12.95	<input checked="" type="checkbox"/>	
493147	BEROCCA PERF OF	\$13.86	\$10.60	8	\$14.95	-7	\$12.95	<input checked="" type="checkbox"/>	
427829	BEROCCA PERF RE	\$9.00	\$8.55	36	\$13.50	31	\$12.95	<input checked="" type="checkbox"/>	
614157	BEROCCA PERFOR	\$12.19	\$10.36	11	\$14.95	-3	\$12.95	<input checked="" type="checkbox"/>	
806145	BEROCCA TROPICA	\$13.38	\$11.14	-1	\$14.50	-12	\$12.95	<input checked="" type="checkbox"/>	

Change Prices:
Retail = \$12.95

HINT: Use space bar to select or unselect items to be changed.

OK Cancel

Figure 189

Note: Always review the 'New Markup and 'New Retail columns (shown in blue) prior to proceeding.

7. Any products that don't require the change can be un-ticked. Use the mouse or [spacebar] on your keyboard to tick or un-tick each line.
8. Any line that is un-ticked will not be changed and the original price and markup will be retained.

Note: Any changes to retail prices will cause shelf labels to be added to the queue providing that Stock Card Option is selected on the Stock Card.

4.2 Bulk Stock Card Changes

The Change Stock Cards utility enables you to make group changes in the stock cards. These can be performed via Department, Sub Department, Product Sub-Group, Supplier and/or Item Name.

You can make changes to Product Group, add or remove suppliers, change preferred supplier, manufacturer and POS message.

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Change Stock Cards.
2. The Change Stock Cards window will be displayed (as shown in Figure 190). Use the 'Search Criteria' to filter for the stock cards you wish to change.
3. Use the 'Category to Change' to filter for the stock cards you wish to change to.
4. For example if you want to change the all items in the Stock Group 'Baby Formula' to the Product Sub-Group 'Baby formula'; then you would follow the example show in Figure 190.

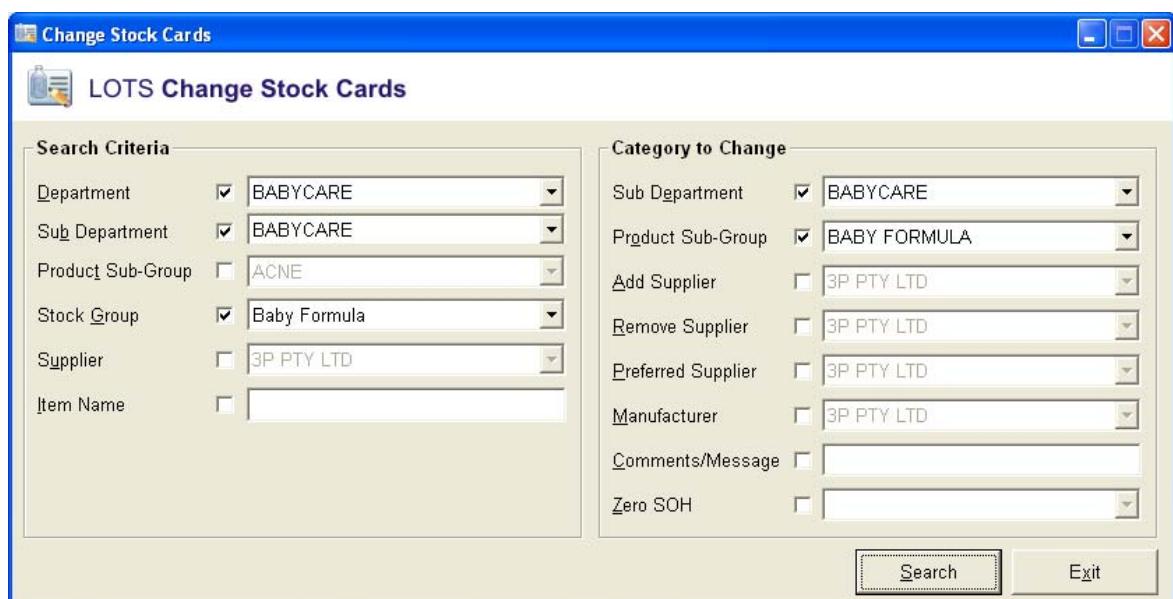


Figure 190

Note: Please be careful when using the 'Zero SOH' option as zeroing your stock on hand cannot be undone. It is recommended that a backup of the LOTS database be performed before this task is undertaken.

5. Once you have made your selection/s select 'Search'.

6. The ‘Stock Cards to be Changed’ screen will appear (Figure 191) showing every item that is about to be changed. All items will have a tick in the ‘Change?’ column tick box by default. If there are items listed that you do not wish to change remove the tick from the ‘Change?’ column tick box.

Note: The type of change (or changes) about to take place will be listed at the top of the screen under the section ‘Changes’.

Note: You can select/unselect all stock cards by ticking/unticking the ‘Select/unselect all stock cards’ option.

7. Once you are satisfied with your selection, select ‘Apply Changes’.

The screenshot shows a software window titled 'Stock Cards to be Changed (807 items found)' with a sub-title 'LOTS Change Stock Cards'. At the top left is a small icon of a clipboard with a document. Below the title, a section labeled 'Changes:' contains the text 'Set SOH to Zero (Count)'. The main area is a grid table with the following columns: PLU, TradeName, Department, Sub Department, Pref supplier, Manufacturer, and Change?. The 'Change?' column contains several checked checkboxes. A note at the bottom of the grid says 'Click a column heading to sort by that column. Use spacebar to select or unselect stock cards to be changed.' Below the grid is a checkbox labeled 'Select/unselect all stock cards' with the checked option. At the bottom right are two buttons: 'Apply Changes' and 'Cancel'.

PLU	TradeName	Department	Sub Department	Pref supplier	Manufacturer	Change?
435586	AVENT ISIS BREAST PMP&BTLSTD	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
619437	AVENT ISIS BRST SHELLS 013 2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
760215	AVENT ISIS IQ BREAST/P ELECT	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
816223	AVENT ISIS PUMP OUT& ABOUT SET	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
406252	AVENT MAGIC CUP HANDLES 260ML 2Pk	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
406244	AVENT MAGIC CUPS 260ML 2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
642553	AVENT NIPPLE PRTCT SML 2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
758888	AVENT POWDERED MILK DISPENSER	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
855783	AVENT ROOM & BATH THEMOMETER	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
642546	AVENT SEALING DISC 6PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
293480	AVENT STARTER SET NBORN	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
816207	AVENT STEAM STERILISER 420 240V	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
756734	AVENT STHR SIL 0-3M TRNSLC 2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
741280	AVENT STHR SIL 6M+ ANIMAL2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
293639	AVENT TEAT TONGS 1PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
403246	AVENT TEAT TRAVEL PACK 2PK	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>
855718	AVENT THERM SET	BABYCARE	BABYCARE			<input checked="" type="checkbox"/>

Click a column heading to sort by that column. Use spacebar to select or unselect stock cards to be changed.

Select/unselect all stock cards

Apply Changes Cancel

Figure 191

Note: After selecting ‘Apply Changes’ a prompt will appear notifying you how many stock cards have been successfully changed.

4.3 Stock Groups

A Stock Group is a group of stock items that you have grouped together for the purpose of ordering or reporting.

1. Navigate from the LOTS Start Menu select Tools → Utilities → Stock Utilities → Modify Stock Groups.

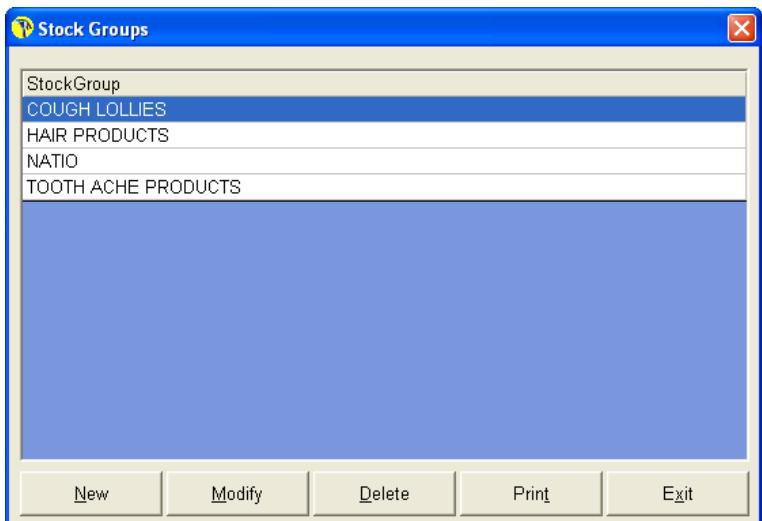


Figure 192

2. The 'Stock Groups' window will be displayed (as shown in Figure 192).
3. Select 'New' to create a new Stock Group name.

4. The Stock Group Items window will be displayed (as shown in Figure 193).

5. Enter a name for this Stock Group, e.g. "Toothpastes".

6. Select 'Add Item' to add stock items on-by-one.

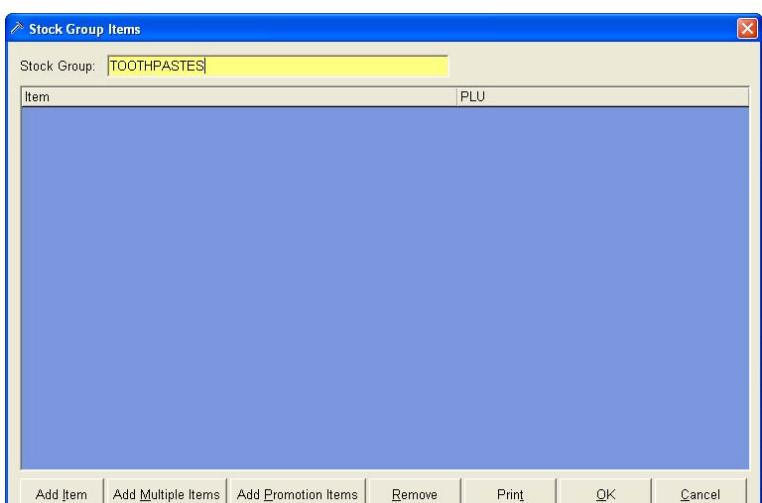


Figure 193

7. Select 'Add Multiple Items' to search for a group of stock items to add using the filters (see Figure 194).

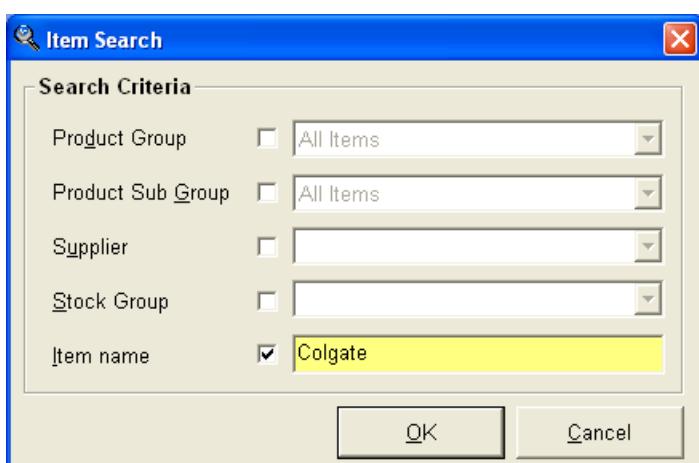


Figure 194

8. Add **Promotion Items**' enables you to add the items from an Auto Special (see Figure 195).
 9. Continue adding items to the Stock Group until the screen lists all the desired items.
 10. Select '**Remove**' to delete unwanted stock items from the Stock Group.
 11. Print the list of items within the Stock Group if desired using the **Print** button.
 12. Click '**OK**' to save your Stock Group.
 13. You can modify or delete an existing Stock Group by selecting the Modify or Delete buttons (as shown in Figure 192).
- Note:** A stock item can exist in more than one Stock Group simultaneously.
14. Once Stock Groups have been setup they are available as a filter on a number of reports throughout LOTS. Once Stock Groups have been setup they are available as a filter in Orders, Sales Reports, Rolling Stocktake and in other modules.



Figure 195

4.4 Add/Edit Specials

LOTS allows you to assign products to be set at discounted prices for a specific time period or until a certain amount of the product are sold.

1. Navigate from the LOTS Start Menu select Tools → Utilities → Stock Utilities → Add/Edit Specials.
2. This will display the 'Edit/Add Auto Specials' window. Select the File drop-down menu → Add New Special.
3. Selecting 'Add New Special' will display the 'Select An Item' window (see Figure 196).
4. This window has two tabs the first being 'Search' which allows you to search for products. Once you have found the products you are looking for you can add them to the 'Item(s) in List' tab by selecting 'Add/Remove' for individual items or 'Select All' for all the products in the current search.

Note: The purpose of the 'Item(s) in List' is simply just to see what products are going to be added as specials.

5. To remove an item from the list simply highlight the item in the 'Search' tab again, and select the 'Add/Remove' button.
6. Once you have added all your desired products to the 'Item(s) in List' tab select 'OK'.
7. This will populate the item into the 'Edit/Add Auto Specials' window (see Figure 197).

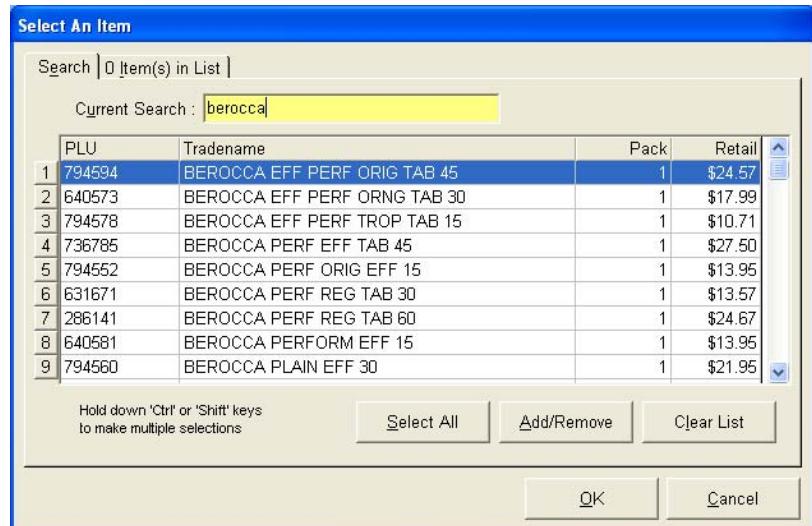


Figure 196



Figure 197

8. You must add in the following:

- **Start Date** – This is the start date of the promotion.
- **Finish Date** – This is the finish date of the promotion. After this date the promotion will no longer be available.
- **Special Retail Price** – This is the price of the product while it is on special.

Optional fields include:

- **Max Qty** – The max quantity value is set to limit the amount of products that are allowed to be sold for the promotional price. For example if the max quantity is set to 50, then the first 50 products will be sold for the special price, then any product sold after this will revert back to the previous price. If this field is left blank then there is no limit to amount of products that are allowed to be sold for the promotional price.
- **Allow Discount** – You can enable/disable the ability to allow a further discount to a product already on special.
- **Promotion Name** – A promotion name can be very useful especially when filtering for report and searching though auto special products.
- **POS Message** – This field allows you to enter in a message to be displayed at POS to the pharmacy operator when the auto special is being sold.
- **Special Cost** – The special cost is the price you have paid for the product while it is on promotion. It is import that this price is entered in correctly to accurately calculate your Gross profit

9. The three different types of specials are colour-coded:

- **Blue** – This is a special that is not yet active.
- **Red** – This is a special that is currently active.
- **Grey** - This is an old special.

10. You can use the view drop-down list to filter between the different types of specials.

4.4.1 Specials Report

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Add/Edit Specials → Reports drop-down menu → Specials Report.
2. This will display the 'Specials Report' window (see Figure 198).
3. This window will allow you to generate a report based on:
 - All items on a particular Promotion.
 - All sales of promotion items in a certain Date Range.



Figure 198

SPECIALS REPORT							
CORUM HEALTH SERVICES 7 BUSINESS PARK DRIVE NOTTING HILL VIC 3168 Ph: 03 8541 6988 Fax: 03 8541 6989							
Promotion: Corum Catalogue From: 01/03/2010 To: 30/03/2010							
PLU	Item	SOH	Qty Sold	Spec Cost	Spec Retail	GP%	Total Sales
917077	B/M VG*ZINVIT TAB 100	3	0	\$7.93	\$12.95	0%	\$0.00
871816	BEROCCA DRINK ORIG 250ML	3	5	\$2.15	\$3.60	34%	\$18.00
871824	BEROCCA DRINK ORNG 250ML	2	1	\$0.00	\$3.60	100%	\$3.60
794560	BEROCCA EFF PERF ORIG TAB 30	5	0	\$0.00	\$16.95	0%	\$0.00
794594	BEROCCA EFF PERF ORIG TAB 45	5	0	\$14.36	\$22.95	0%	\$0.00
640573	BEROCCA EFF PERF TAB 30	-4	6	\$10.38	\$16.95	33%	\$101.70
736785	BEROCCA EFF PERF TAB 45	0	0	\$14.74	\$22.95	0%	\$0.00
794586	BEROCCA EFF PERF TROP TAB 30	0	0	\$0.00	\$16.95	0%	\$0.00
794586	BEROCCA EFF TROP TAB 30	0	0	\$14.71	\$24.28	0%	\$0.00
794552	BEROCCA ORIG EFF TAB 15	0	0	\$6.55	\$9.95	0%	\$0.00
917076	BIOG GLUCOSAMINE 1500MG 90	5	0	\$14.27	\$19.95	0%	\$0.00
507376	CETAPHIL MOIST CRM 100G	13	0	\$5.20	\$8.35	0%	\$0.00
831685	HLB 2046L-I TCCA SHINY TCCA GUMMETA	18	5	\$10.38	\$9.95	-15%	\$49.75
831693	HLB SHARPVISION GOLD BLACK	20	3	\$6.48	\$9.95	28%	\$29.85
900870	MYLANTA 11 TABLETS 20	10	5	\$0.00	\$4.85	100%	\$24.25
729574	NWAY BACK PAIN 24 TABS	0	0	\$0.00	\$8.95	0%	\$0.00
Total			25			45%	\$227.15

4.5 Goods & Shelf Label Printing

The Labelling program will allow you to bulk print labels (goods or shelf).

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Labelling Program.
2. This will display the 'Labeller' window (see Figure 199).
3. Use the 'Search Criteria' to determine which products you wish to print labels for.
4. You must then specify if you wish to print:
 - **Shelf Labels** – This will print one shelf label for every product in the search criteria.
 - **Good Labels** – If you select this option you will need to specify the maximum amount of labels to print (see the tables below for example). LOTS will print goods label equals to the SOH for that product.

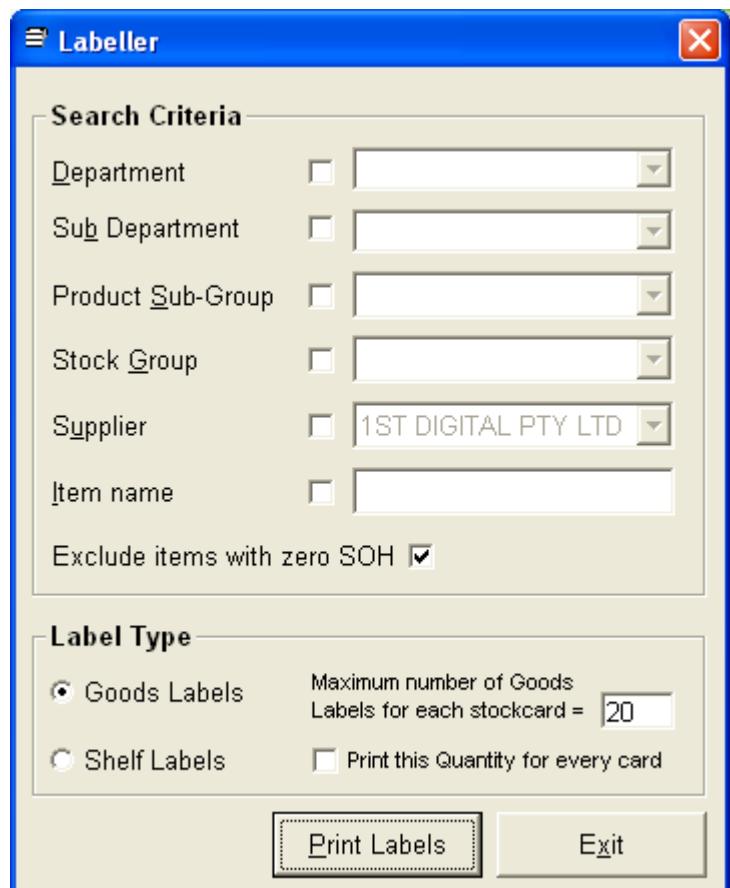


Figure 199

Note: Goods labels print only when they fill a row of labels. For example if each sheet of goods labels has three labels per row and you are requesting five labels to be printed out, the first three will be printed and the next two will print out when a sixth label is sent to the printer. The reason for this is so labels are not wasted.

Rules:

- Maximum number of Goods Labels for each stock card = 20
- Print the Quantity for every card = Not ticked

Product	SOH	Number Of Labels Printed
Product 1	25	20
Product 2	17	17
Product 3	12	12

Rules:

- Maximum number of Goods Labels for each stock card = 20
- Print the Quantity for every card = Ticked

Product	SOH	Number Of Labels Printed
Product 1	25	20
Product 2	17	20
Product 3	12	20

4.6 Add Creditor Transactions

Ensure you have correct expense details (epically creditor's transactions) as it is essential for being able to generate an accurate BAS statement (see section: **10.13 – Business Activity Report**).

This utility should also be used to track the GST on purposes.

If using this utility it is recommended that you also enable a setting in orders for an automatic prompt to key in the creditors details each time an invoice is received (refer to section – **7.14 Order Delivering An Order**).

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Add Creditor Transaction.
2. This will display the 'Enter Expense Details' window (see Figure 200).
3. There are six fields to enter in, they are:
 - **Invoice Ref. No** – This is the invoice reference number, this is normally your invoice number as received from your creditor.
 - **Description** – Use this field to enter in a detailed description.
 - **Cost** – this is the price paid to the creditor
 - **Amt of GST Paid** – If GST was paid to the creditor enter in the amount into this field.
 - **Date of Invoice** – What date did you receive the invoice. This defaults to the current date, but can be change to any past or future date.
 - **Supplier Name** – Enter in the creators/suppliers name.
4. When complete select Save.

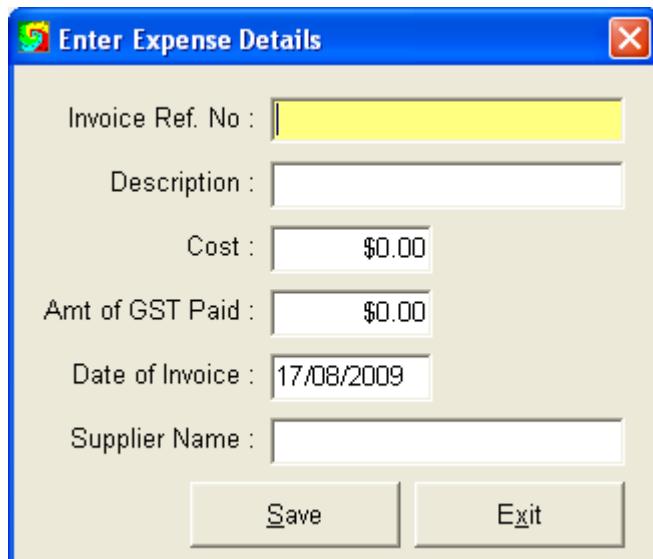


Figure 200

4.7 Edit Creditor Transactions

- To edit a previously entered creditor's transaction navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Edit Creditor Transaction.
- This will display the 'Expenses' window (see Figure 201). There are two options to chose from:
 - All Dates** – If you can't remember what date the creditor's transaction was entered, select this option to list all creditor transactions.
 - Date Range** – If you know when the transaction you wish to edit was entered, select this option and enter in the date range.

- Once you have selected your option, select 'OK'.
- This will display the second 'Expenses' window (see Figure 202). Double click on the transaction you wish to edit, or select 'Print' to print a list of the creditors.

Note: You can also use the 'Search' function to revert back first 'Expenses' screen to change your search criteria.

- Double clinking on a transaction will display the 'Expense Editor' window (see Figure 203). You have two options, the first is to change any details of the record and then update it, or if you wish you can delete the record entirely.



Figure 201

Reference No.	Description	Total Cost	Total GST Paid	Date	Supplier Name
938005159	Invoice for Delivered Orde	\$394.98	\$39.50	17/07/2009	Sigma
938005161	Invoice for Delivered Orde	\$25.69	\$2.57	17/07/2009	Sigma
353105	Invoice for Delivered Orde	\$441.03	\$44.12	17/07/2009	SWAPS
353101	Invoice for Delivered Orde	\$163.69	\$16.38	17/07/2009	SWAPS
9000062355	Invoice for Delivered Orde	\$1,128.60	\$112.66	17/07/2009	BAYER AUSTRALIA LTD
938005162	Invoice for Delivered Orde	\$22.72	\$2.27	17/07/2009	Sigma
352864	Invoice for Delivered Orde	\$597.53	\$59.76	16/07/2009	SWAPS
119069240	Invoice for Delivered Orde	\$41.63	\$4.16	16/07/2009	Faulding
352886	Invoice for Delivered Orde	\$138.00	\$13.80	16/07/2009	SWAPS
93791398	Invoice for Delivered Orde	\$14.26	\$1.43	16/07/2009	Sigma
93791395	Invoice for Delivered Orde	\$15.48	\$1.55	16/07/2009	Sigma
93791397	Invoice for Delivered Orde	\$22.43	\$2.24	16/07/2009	Sigma
237822	Invoice for Delivered Orde	\$18.25	\$1.83	16/07/2009	RENER HEALTH PRO

Figure 202

Reference Number :	123456
Total Cost :	\$163.69
Total GST Paid :	\$16.38
Date :	17-Jul-2008
Description :	Invoice for Delivered Order
Supplier Name :	SWAPS
<input type="button" value="Update Record"/> <input type="button" value="Delete Record"/> <input type="button" value="Cancel"/>	

Figure 203

4.8 Bonus Buys

Bonus-Buys provide a discount or incentive for targeted or specific items, for example:

- Purchase 1 shampoo and get 1 conditioner free.
- Purchase 1 shampoo and get 20% of a conditioner.

4.8.1 Setting Bonus-Buy Details

1. To set up a new Bonus-Buy, navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Multi-buys.
2. This will display the Multi-Buys setup window (see Figure 204).
3. To create a new Bonus-Buy select New.
4. Under **Type** ensure Bonus-Buy is selected.
5. Then enter in the following:
 - **Multi-Buy Name** – The name of the Bonus-Buy.
 - **Message at Till** – This is the message to be displayed at the till when the bonus-buy is triggered. This will advise the sales people to companion sell the bonus item.
 - **Start Date** – The date the Bonus-Buy is to begin.
 - **Finish Date** – The date the Bonus-Buy is to finish.
 - **Suspended** – If for any reason you need to suspend the Bonus-Buy before the Finish Date you will need to tick the Suspended tick box (e.g. waiting for more stock).
 - **Max. Occurrences Per Sale** – This is the maximum amount of times the Bonus-Buy is allowed to be sold per sale.

Note: Once a multi-buy (or bonus-buy) is created its 'Multi-Buy Name' will be listed in the left hand side of the window. This left hand side lists all multi-buys every created allows you to easily find a multi-buy as you can search by past, current or future multi-buys. This allows you to quickly extend, suspend, re-activate or change a multi-buy.

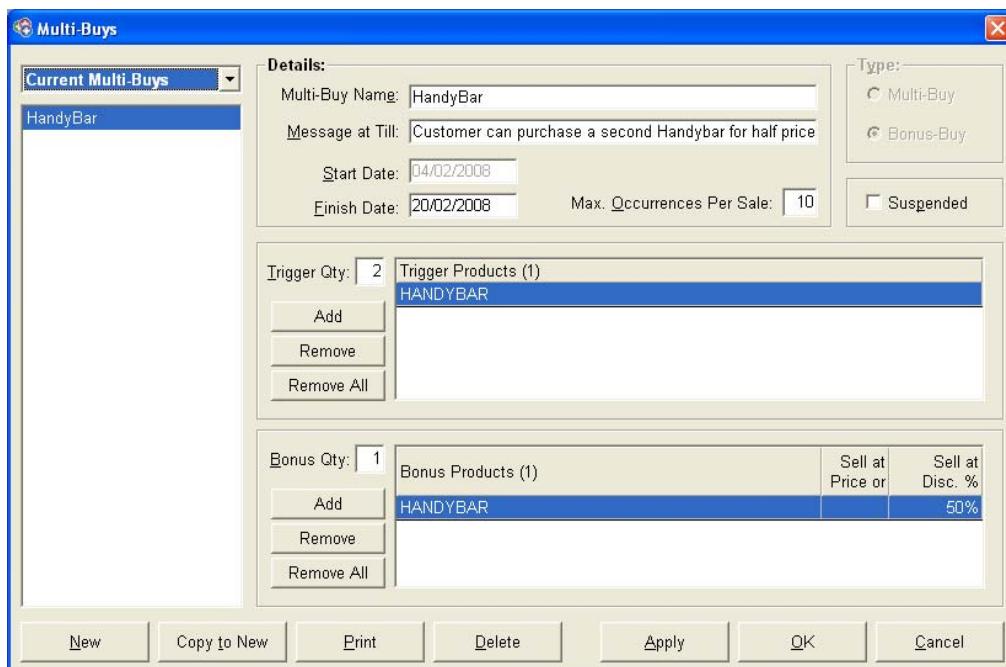


Figure 204

4.8.2 Adding/Removing Bonus-Buy Products

- Whilst in the Multi-Buys window select your trigger product or products by selecting 'Add' (see Figure 205).

Note: The trigger product is the item the customer must purchase in order to receive the bonus product.

- This will display the 'Stock Multi Search' window.
- Use the filters to access the list of products you wish to set as the trigger products.

Note: You can set a single product or a group of products as trigger products.

- Once you have selected the product, set the 'Trigger Qty'.
- For example, if you wanted to give a bonus product to someone who brought 2 items then you would set the trigger quantity to 2.
- If you accidentally enter an unwanted trigger or bonus product, simply highlight the product and select 'Remove'. Alternately to remove all products from the list select 'Remove All'.
- Selecting Add will display the 'Stock Multi Search' window for the bonus items (see Figure 206).
- This stock multi search window has a 'Default Value' section which will apply either a discount price or percentage to the bonus product selected.

Note: When you select the Bonus product you can either sell it at a set price or at a percentage discount.

If you wish to give the bonus item for free set the Sell at Price to \$0.00 (or the discount to 100%).

- Once you have chosen your filters and set the Default Value, select 'OK'. This will display a list of products to choose from.
- When you return to the Multi-Buys window set the 'Bonus Qty' (see Figure 207).

Note: The Bonus Quantity is the number of bonus items the customer can receive. For example, if the Bonus Qty was set to 2 then the pharmacy operator could choose any two of the bonus products listed.

- Once all options are set select 'Apply'.

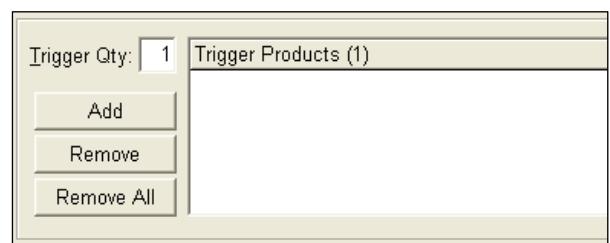


Figure 205

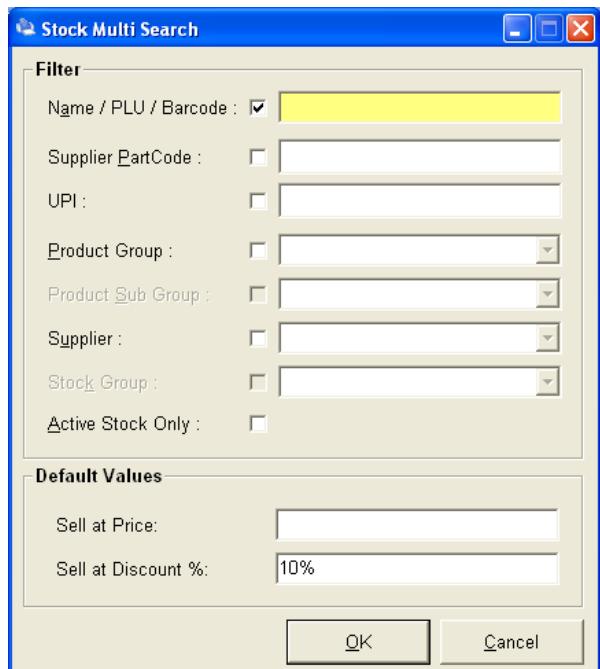


Figure 206



Figure 207

4.8.3 Copy To New

Occasionally you may want to duplicate a complex Bonus-Buy rather than enter the details again.

The 'Copy to New' feature will allow you to replicate the Bonus Buy.

1. Whilst in the Multi-Buys window select your trigger product or products by selecting 'Add'
2. The 'Copy to New' feature will copy all settings from the original Bonus-Buy to a new one except for:
 - Multi-Buy Name
 - Start Date
 - Finish Date

Note: All other settings may also be amended if required.

4.8.4 Bonus-Buy Report

If you wish to report on bonus-buy sales refer to section: **10.12 – Multi-Buy Report.**

4.8.5 Bonus-Buy Example I – ‘Buy 2 & Receive 1 Free’

This example explains how to setup a Bonus-Buy where when the customer purchases 2 Berocca's they receive a third one free.

1. When setting up the Details section of the Bonus-Buy window ensure that the **Message at Till** explains to the pharmacy operator that the customer will receive a third Berocca for free if they purchase 2 (see Figure 208).
2. Ensure the Bonus-Buy radio button is checked and that you have entered a start and finish date.
3. For this example you need to Add Berocca as the Trigger Product and set the Trigger Qty to 2 (see Figure 209).
4. The Bonus Product also needs to be Berocca but the Bonus Qty only needs to be set to 1 (see Figure 210).
 - **Buy 2** (Trigger Qty = 2)
 - **Get 1 Free** (Bonus Qty = 1)
5. In the Bonus window set the Sell at Price for the Berocca to \$0.00 (or you can set the Sell at Disc % to 100%).
6. When a Bonus-Buy item is brought up at the sales screen, you will notice that a different icon appears.
7. When a Bonus-Buy item is highlighted in the sales screen, the '**Message at Till**' text will be displayed to the pharmacy attendant (see Figure 211).
8. When the pharmacy attendant sells Berocca, enter the Quantity as 3 and then press <Enter>.
9. An extra line is added to the sale indicating that one of the items will be given free.

Details:	
Multi-Buy Name: Berocca Buy 2 get 1 free	
Message at Till: Prompt the customer to buy 2 beroccas to get 1 free	

Figure 208

Trigger Qty:	2	Trigger Products (1)
BEROCCA PERFORM REGULAR TAB 30		
Add	Remove	Remove All

Figure 209

Bonus Qty:	1	Bonus Products (1)	Sell at Price or	Sell at Disc %
		BEROCCA PERFORM REGULAR TAB 30	\$0.00	
Add	Remove	Remove All		

Figure 210

LOTS New Sale					
File Edit View Sale Price Change Total Sale LOTS					
Salesperson: Cathy		Customer: []			
Stock Item		Quantity	Retail	Disc	Subtotal
BEROCCA EFF PERF ORIG TAB 45		1			\$0.00 <input checked="" type="checkbox"/>
GST Status					
<input checked="" type="checkbox"/> End Consumer					
TOTAL 1 item \$0.00					
BEROCCA EFF PERF ORIG TAB 45 STOCK ITEM Multi-Buy Item Multi-Buy : Prompt the customer to buy 2 Beroccas to get 1 free.					
UPI	PLU	SOH	Retail		
112087	794594	0	\$24.57		
<input type="button" value="Abandon Sale"/>					
Cash EFTPOS Cheque C/Card Other					

Note: Once a Bonus-Buy has been activated the text of the Bonus-Buy items turn green.

4.8.6 Bonus-Buy Example II – ‘Buy 1 & Receive 50% Off A Second One’

This example explains how to setup a Bonus-Buy where when the customer purchases 1 Aspro Clear the customer can purchase another one for half price (50% off).

1. When setting up the Details section of the Bonus-Buy window ensure that the ‘Message at Till’ text explains to the pharmacy attendant that the customer will receive a second Aspro Clear for half price (see Figure 212).
2. Ensure the Bonus-Buy radio button is checked and that you have entered a start and finish date
3. For this example you need to Add Aspro Clear as the Trigger Product and set the ‘Trigger Qty’ to 1 (see Figure 213).
4. The Bonus Product also needs to be Aspro Clear and the ‘Bonus Qty’ to be set to 1
5. In the Bonus window set the ‘Sell at Disc %’ to 50% (see Figure 214).
6. When a Bonus-Buy item is brought up at the sales screen, you will notice that a different icon appears.
7. When a Bonus-Buy item is highlighted in the sales screen, the ‘Message at Till’ text (Figure 215) will be displayed to the pharmacy attendant.
8. When the pharmacy attendant sells Aspro Clear, enter the Quantity as 2 and then press <Enter>
9. An extra line is added to the sale indicating that the second Aspro Clear is 50% off.

Note: Once a Bonus-Buy has been activated the text of the Bonus-Buy items turn green.

Details:
Multi-Buy Name: Aspro Clear 50% Off
Message at Till: Prompt the customer a second Aspro Clear for half price

Figure 212

Trigger Qty:	1	Trigger Products (1)
ASPRO CLEAR TABS 24		
Add		
Remove		
Remove All		

Figure 213

Bonus Qty:	1	Bonus Products (1)	Sell at Price or Disc.
		ASPRO CLEAR TABS 24	50%
Add			
Remove			
Remove All			

Figure 214

LOTS New Sale

Salesperson: Pharmasol	Customer:				
Stock Item	Quantity	Retail	Disc	Subtotal	GST
ASPRO CLEAR TABS 24	1	\$4.95		\$4.95	<input type="checkbox"/>

GST Status: End Consumer

TOTAL 1 item \$4.95

ASPRO CLEAR TABS 24 STOCK ITEM

Multi-Buy : Prompt the customer a second Aspro Clear for half price

Lay-by

Abandon Sale

Cash EFTPOS Cheque C/Card Other

Figure 215

4.9 Multi Buys

Multi-Buys allow you to apply a special price or discount on a range of products for example:

- Buy 1 cosmetic item and get 10% off any other cosmetic item in that range.
- Buy 1 Kodak film for \$2.00 or buy 3 for \$5.00

4.9.1 Setting Multi-Buy Details

1. To set up a new Multi-Buy, navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Multi-Buys.
2. This will display the 'Multi-Buys' window (as shown in Figure 216).
3. Under 'Type' ensure Multi-Buy is selected.
4. To create a new Multi-Buy select 'New'.
5. Then enter in the following (see Figure 217):
 - **Multi-Buy Name** – The name of the Multi-Buy.
 - **Message at Till** – This is the message to be displayed at the till when the Multi-Buy is triggered. This will advise the sales people to companion sell additional items.
 - **Start Date** – The date the Multi-Buy is to begin.
 - **Finish Date** – The date the Multi-Buy is to finish.
 - **Suspended** – If for any reason you need to suspend the Multi-Buy before the Finish Date you will need to tick the Suspended tick box (e.g. waiting for more stock).
 - **Max. Occurrence Per Sale** – This is the maximum amount of times the Multi-Buy is allowed to be sold per sale.

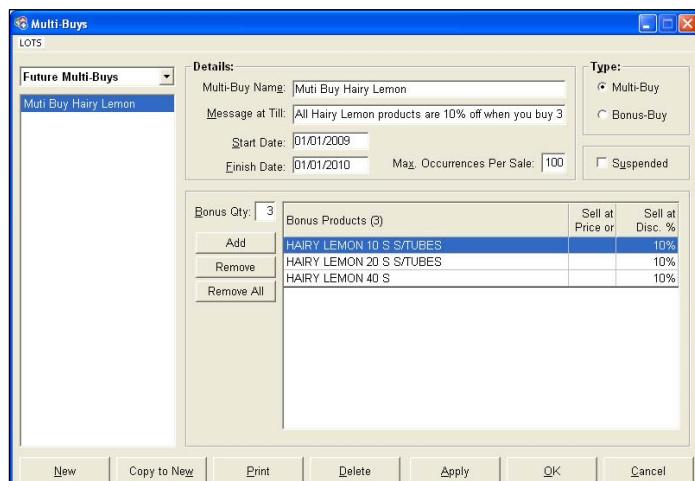


Figure 216

Figure 217

4.9.2 Adding/Removing Multi-Buy Products

1. Whilst in Multi-Buys select your Bonus product or products by selecting 'Add' (see Figure 218).
2. This will display the 'Stock Multi Search' window (as shown in Figure 219).
3. Once you have entered in your filters and set the Default Value, select 'OK'. This will display a list of product to choose from.
4. When you select the Bonus products you can either sell it at a set price or at a percentage discount by using the Default Values fields.
5. After selecting 'OK', set the 'Bonus Qty' for the amount of products that must be purchased to receive the set discounts (or prices).

Note: If you wanted to give a discount to someone who bought 3 packs of Berocca then you would set the bonus quantity to 3 (see Figure 220).

6. Once all options are set select 'Apply'.
7. If you accidentally enter an unwanted trigger or bonus product, simply highlight the product and select 'Remove'.
8. Alternately to remove all products from the list select 'Remove All'.

Figure 218

Figure 219

Figure 220

4.9.3 Copy To New

Occasionally you may want to duplicate a complex Multi-Buy rather than enter the details again.

The 'Copy to New' feature will allow you to replicate the Bonus Buy.

1. Whilst in the Multi-Buys window select your trigger product or products by selecting 'Add'
2. The 'Copy to New' feature will copy all settings from the original Bonus-Buy to a new one except for:
 - Multi-Buy Name
 - Start Date
 - Finish Date

Note: All other settings may also be amended if required.

4.9.4 Multi-Buy Report

If you wish to report on multi-buy sales refer to section: **10.12 – Multi-Buy Report.**

4.9.5 Multi-Buy Example I – ‘Buy Any 3 Hair Lemon Products & Receive 10% Off’

This example explains how to setup a Multi-Buy where if the customer purchases any 3 Hairy Lemon products they will receive 10% off.

- When setting up the Details section of the Multi-Buy window ensure that the Message at Till explains to the pharmacy attendant that the customer will receive a 10% discount on their Hairy Lemon products when they purchase 3 or more (see Figure 221).

Details:
Multi-Buy Name: Muti Buy Hairy Lemon
Message at Till: All Hairy Lemon products are 10% off when you buy 3

Figure 221

- Ensure the Multi-Buy radio button is checked and that you have entered a start and finish date.

- For this example you will need to add every Hairy Lemon product to the Bonus Products window and set the Sell at Disc % to 10% (see Figure 222).

Bonus Products (3)	Sell at Price or	Sell at Disc. %
HAIRY LEMON 10 S S/TUBES		10%
HAIRY LEMON 20 S S/TUBES		10%
HAIRY LEMON 40 S		10%

Figure 222

- To apply a 10% discount when the customer purchases 3, the Bonus Qty will need to be set to 3 (see Figure 223)

Note: If the Bonus Qty is set to 3 the 10% discount will only get applied to multiples of three.

- When a Multi-Buy item is brought up at the sales screen, you will notice that a different icon appears:

- The Message at Till will be displayed to the pharmacy attendant whenever a Hairy Lemon product is being sold at the register (as shown in Figure 224).

- The 10% discount can occur in a number of ways for example:
 - A customer can purchase a single Hairy Lemon product with a quantity of 3.
 - 3 individual Hairy Lemon products.
 - Or 2 of one Hairy Lemon product and 1 of another Hairy Lemon product.

Bonus Qty: 3
Add
Remove
Remove All

Figure 223

LOTS New Sale
File Edit View Sale Price Change Total Sale LOTS
Salesperson: Cathy Customer:
Stock Item Quantity Retail Disc Subtotal GST
HAIRY LEM 10 TUBES 1 \$0.00
GST Status End Consumer
TOTAL 1 item \$0.00
HAIRY LEM 10 TUBES STOCK ITEM
Multi-Buy Item
Multi-Buy: All Hairy Lemon products are 10% off when you buy 3
UPI PLU SOH Retail
7259 757112 0 \$7.11
Abandon Sale
Cash EFTPOS Cheque C/Card Other

Figure 224

- When any one of the above examples are triggered the discount field will show 10% off.

5 Staff Utilities

LOTS has a full security system, which can be used to control or restrict access to specific parts of the LOTS program. A module called 'Audit trail' also records all activity on the system, for example, which staff member which staff member performed a sales when and what type of transaction occurred.

There are four modules in the 'Staff Utilities' menu. These modules help you add, edit and delete staff members, set access rules and edit security levels.

5.1 Modify Staff

This section allows you to set a staff ID, password and security level for each staff member of your pharmacy.

5.1.1 Add New Staff Member

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Modify Staff.
2. This will display the 'Modify Staff' window (see Figure 225).
3. To add a new staff member select 'New'.
4. This will display the 'Add/Edit Staff Member' window (see Figure 226).
5. There are four fields to populate, they are:
 - **Staff Name** – Enter in the staff member's name on the sales receipt when this staff member sells.
 - **Staff ID** – Enter in a unique staff ID. No two users can have the same staff ID.
 - **Password** – A staff member's password is their primary security measure and also defines the amount of functionality available to them (via security levels). It is essential that all staff members kept their passwords confidential.
 - **Security Level** – This allows you to select one security level from the list. LOTS comes with four default levels (Administrator, Manager, Senior and Junior), but more can be added/deleted. For more information on security levels refer to section **5.3 – Edit Security Levels**.

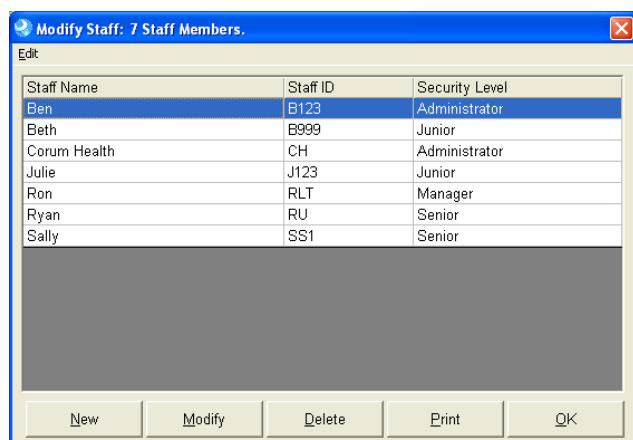


Figure 225



6. Once you have entered in/changed the staff members details, select 'OK'

Note: You can also print a list of the staff members by selecting the 'Print' option.

5.1.2 Modify Existing Staff Member

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Modify Staff.

2. This will display the 'Modify Staff' window (see Figure 227).

The screenshot shows a Windows application window titled "Modify Staff: 7 Staff Members". The window has a toolbar at the top with buttons for "New", "Modify", "Delete", "Print", and "OK". Below the toolbar is a table with three columns: "Staff Name", "Staff ID", and "Security Level". The table contains the following data:

Staff Name	Staff ID	Security Level
Ben	B123	Administrator
Beth	B999	Junior
Corum Health	CH	Administrator
Julie	J123	Junior
Ron	RLT	Manager
Ryan	RU	Senior
Sally	SS1	Senior

Figure 227

3. To modify an existing staff member, highlight the staff member you wish to modify and select 'Modify'.

4. This will display the 'Add/Edit Staff Member' window (see Figure 228).

The screenshot shows a Windows application window titled "Add/Edit Staff Member". It contains four input fields: "Staff Name" (Corum Health), "Staff ID" (CH), "Password" (*****), and "Security Level" (Administrator). At the bottom are "OK" and "Cancel" buttons.

Figure 228

5. Modify the field (or fields) that you wish to change. If you change the password you will be prompted to confirm it (see Figure 229).

6. Once you have modified/changed the staff member's details, select 'OK'.

The screenshot shows a Windows application window titled "Password Confirmation". It has a single input field labeled "Re-enter password:" and an "OK" button.

Figure 229

5.1.3 Delete Staff Member

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Modify Staff.
2. This will display the 'Modify Staff' window (see Figure 230).
3. To delete a staff member, highlight the staff member you wish to delete then select 'Delete'.
4. This will display the 'Delete Staff Member' prompt (see Figure 231).

Staff Name	Staff ID	Security Level
Ben	B123	Administrator
Beth	B999	Junior
Corum Health	CH	Administrator
Julie	J123	Junior
Ron	RLT	Manager
Ryan	RU	Senior
Sally	SS1	Senior

New Modify Delete Print OK

Figure 230

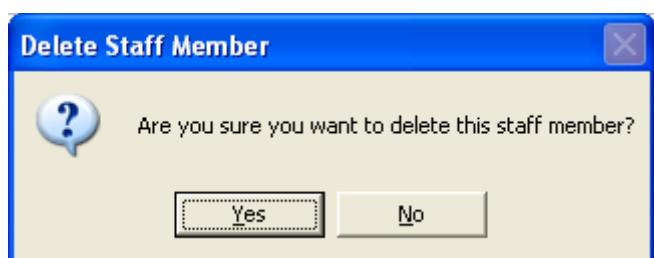


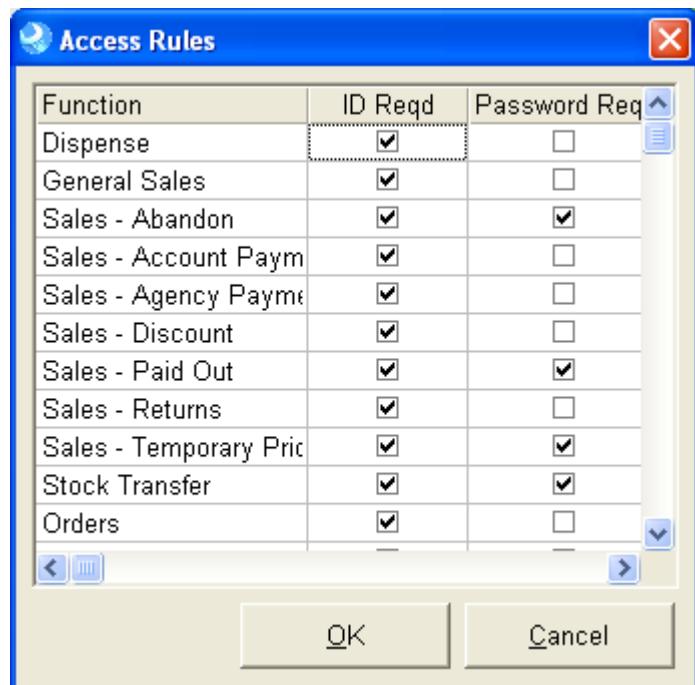
Figure 231

Note: Once you delete a staff member that staff member's ID will remain against all past transactions and therefore will never be able to be assigned to another staff member.

5.2 Set Access Rules

Set Access Rules allows you to define how much security you would like to be applied to certain tasks within certain modules. You may want all users who have the ability to modify stock on hand to enter in a password as this would restrict staff without access trying to guess an ID as opposed to trying to guess an ID and password.

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Modify Staff.
2. This will display the 'Access Rules' window (see Figure 232).
3. This window allows you to set (via tick boxes) what security each function requires either:
 - **No ID** – You will not be required to enter a staff ID. Some modules will require you to enter in an ID.
 - **ID Required** – You will be required to enter a staff ID but not a password.
 - **ID & Password Required** – You will be required to enter a staff ID and a password.



Note: A Password can only be required when an ID is required.

Figure 232

4. The table below defines each Function and Access Rule information:

Function	Description	Default	Rules
Dispense	This allows you to perform Dispense functions.	ID Required	ID Required is mandatory and password is optional.
General Sales	This allows you to perform general sales functions.	ID Required	ID Required is mandatory and password is optional.
Sales - Abandon	This allows you to abandon a sale.	ID Required	ID Required is mandatory and password is optional.
Sales - Account Payment	This allows you to make an account payment	ID Required	ID Required is mandatory and password is optional.
Sales - Agency Payment	This allows you to make an agency payment	ID Required	ID Required is mandatory and password is optional.
Sales - Discount	This allows you to apply a discount to a sale.	ID Required	ID Required is mandatory and password is optional.
Sales - Paid Out	This allows you to use the paid out function.	ID Required	ID Required is mandatory and password is optional.
Sales - Returns	This allows you to perform a return transaction.	ID Required	ID Required is mandatory and password is optional.
Sales – Temporary Price Fix	This allows you to perform a temperate price change.	ID Required	ID Required is mandatory and password is optional.
Stock Transfer	This allows you to perform a stock transfer.	ID Required	ID Required is mandatory and password is optional.

Function	Description	Default	Rules
Orders	This allows you to access the Orders module	ID Required	ID Required is mandatory and password is optional.
Stock Cards	This allows you to access the Stock Cards module	ID Required	ID Required is mandatory and password is optional.
Stock Adjustment	This allows you to make changes to the Stock On Hand field.	ID	ID Required is mandatory and password is optional.
Claims	This allows you to access the Claims module	No requirement	No ID or Password is required. Both are optional.
Debtors	This allows you to access the Debtors module	ID	ID Required is mandatory and password is optional.
Clubs	This allows you to access the Clubs module	No requirement	No ID or Password is required. Both are optional.
End of Day	This allows you to access the End of Day module	No requirement	No ID or Password is required. Both are optional.
Department Report	This allows you to access the Department report.	ID	No ID or Password is required. Both are optional
12 Month History Report	This allows you to access the 12 Month History report.	ID	No ID or Password is required. Both are optional
Statistics Report	This allows you to access the Statistics report.	ID	No ID or Password is required. Both are optional
Statistics Report	This allows you to access the Statistics report.	ID	No ID or Password is required. Both are optional
Staff/Time Analysis Report	This allows you to access the Staff/Time Analysis report.	ID	No ID or Password is required. Both are optional
Business Activity Report	This allows you to access the Business Activity report.	ID	No ID or Password is required. Both are optional
Options	This allows you to access the Options module	No requirement	No ID or Password is required. Both are optional.
Staff Utilities	This allows you to access the Staff Utilities module.	No requirement	No ID or Password is required. Both are optional.
Head Office Options	This allows you to access the Head Office options.	No requirement	No ID or Password is required. Both are optional.
Script Per Hour Report	This allows you to access the Scripts Per Hour report.	No requirement	No ID or Password is required. Both are optional.
Highest Volume Patients/Doctors Report	This allows you to access the Highest Volume Patients report.	No requirement	No ID or Password is required. Both are optional.
Switch to Manual EFT	This allows you to switch EFTPOS to manual state	No requirement	No ID or Password is required. Both are optional.
EFTPOS Settlement	This allows you to turn on/off your EFTPOS settlement statement	ID & Password	No ID or Password is required. Both are optional.
Archive Data	This allows you to archive your data.	No requirement	No ID or Password is required. Both are optional.
Drug Scan Audit Report	This allows you to access the Drug Scan Audit report.	No requirement	No ID or Password is required. Both are optional.
Sales – Permanent Price Change	This allows you to make a permanent price change to a stock card.	No requirement	No ID or Password is required. Both are optional.

Function	Description	Default	Rules
Lay-by Edit	This allows you to edit lay-bys.	No requirement	No ID or Password is required. Both are optional.
Cash Lift	This allows you to perform a cash lift	ID & Password	No ID or Password is required. Both are optional.
Till Reconciliation	This allows you to perform a till reconciliation	ID & Password	No ID or Password is required. Both are optional.
Edit Finalised Cash Lift	This allows you to edit a finalised cash lift	ID & Password	No ID or Password is required. Both are optional.
Set Up Preferred Substitute	This allows you to access the Preferred Substitutes module.	No requirement	No ID or Password is required. Both are optional.
Edit Patient In Script Queuing	This allows you to edit patient details via the Script Queuing module.	No requirement	No ID or Password is required. Both are optional.
Perform OzBiz Export	This allows you to perform an OzBiz export.	ID & Password	No ID or Password is required. Both are optional.
Sales - Cashout	This allows you to perform a cashout within the sales module.	ID & Password	No ID or Password is required. Both are optional.
Sales – Abandon Standalone Sales	This allows you to abandon sales performed on a standalone computer before connecting it back to the network	ID & Password	No ID or Password is required. Both are optional.
Sales - Unlisted	This allows you to perform an unlisted sale	ID & Password	No ID or Password is required. Both are optional.
Special	This allows you to access the Add/Edit Specials module	ID	No ID or Password is required. Both are optional.

5.3 Edit Security Levels

This module allows you to see what functions are available to which security levels. There are four Default levels:

- **Administrator** – This is the highest level possible and people set as administrators will have access to every module. This is often used for the owner of the pharmacy.
- **Manager** – Staff members set to manager by default also have access to every module. This should be the security level for store managers.
- **Senior** – Senior staff have access to most modules but not all. This security level is usually reserved for assistant managers and senior staff.
- **Junior** – The Junior security level (by default) allows access to the more common modules and is usually assigned to new staff and sales assistants.

5.3.1 New Security Levels

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Edit Security Levels.

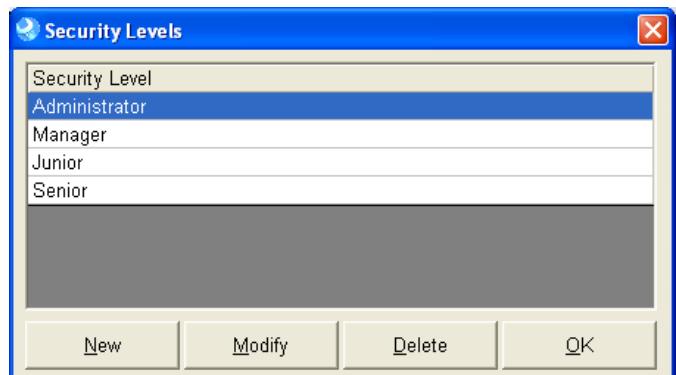


Figure 233

2. This will display the 'Security Levels' window (see Figure 233).

3. To add a new security level select 'New'.
4. This will display 'Add New Security Level' window (see Figure 234).
5. You will need to add a unique security level name in the 'Security Level' field and then specify what functions this security level will have access to.

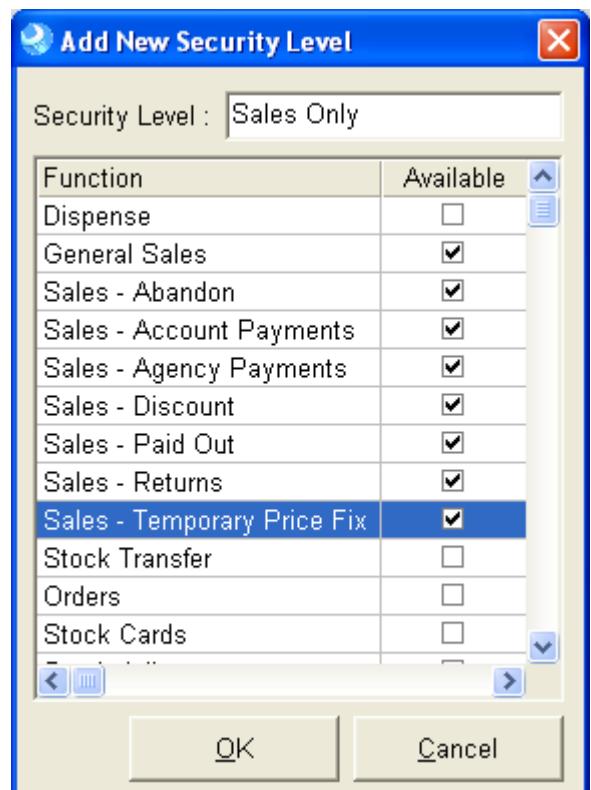


Figure 234

5.3.2 Modify Security Levels

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Edit Security Levels.
2. This will display the 'Security Levels' window (see Figure 235).
3. To modify a security level, highlight the security level and select modify.
4. This will display 'Edit Security Level' window (see Figure 236).
5. You will have the ability to edit the Security Level name and what functions are available.

Note: You can not make any changes to the 'Administrator' security level.

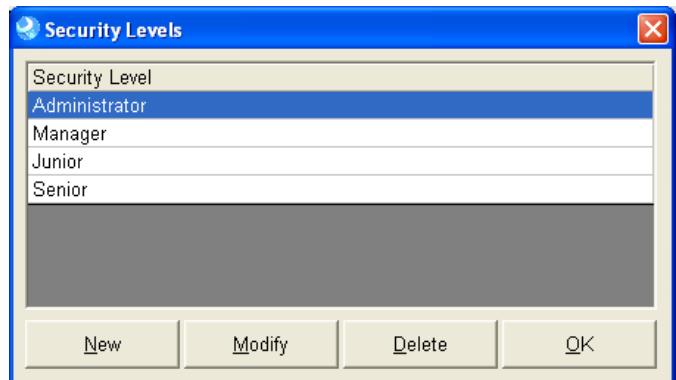


Figure 235

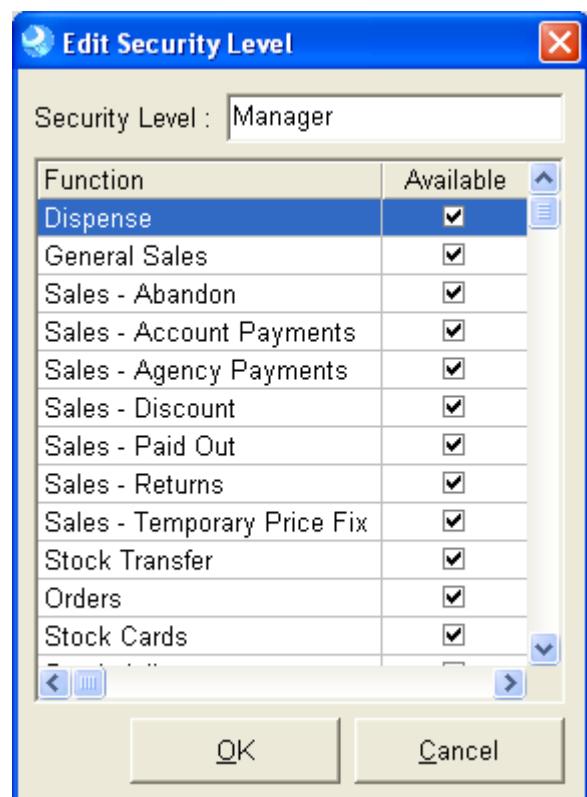


Figure 236

5.3.3 Delete Security Levels

LOTS will not allow you to delete a security level that has staff members assigned to it. To be able to delete the security level check you must remove all staff members by changing their security level.

1. Navigate from the LOTS Start Menu select Tools → Utilities → Staff Utilities → Edit Security Levels.
2. This will display the 'Security Levels' window (see Figure 237).
3. To delete a staff member, highlight the staff member you wish to delete then select 'Delete'.
5. This will display the 'Delete Security Level' prompt (see Figure 238).

Note: You can not delete the 'Administrator' security level.

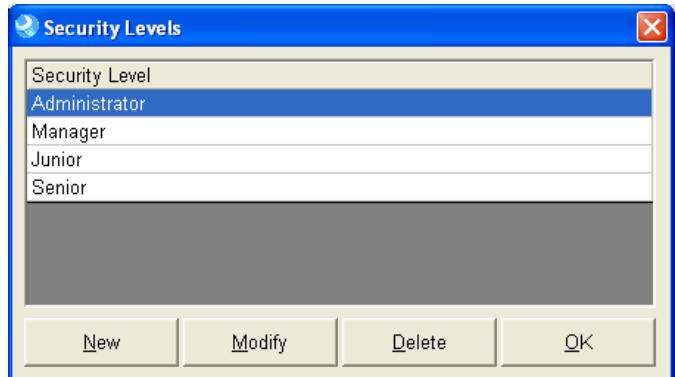


Figure 237

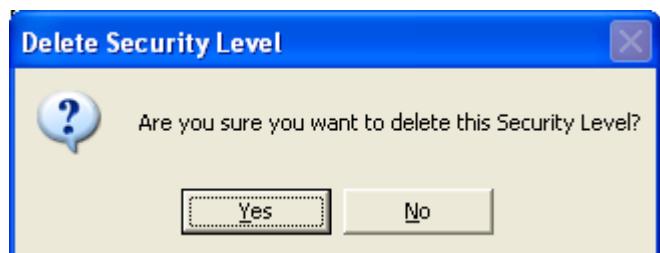


Figure 238

5.4 Diary Function

5.4.1 Activating Diary Alerts

The 'Diary' functionality has been integrated into LOTS to allow pharmacy staff to send messages to each other based on the recipient's staff ID.

Note: Diary Alerts can be used between LOTS stores and head office via RPM.

1. Navigate from the LOTS Start Menu → Tools → Options → Diary Alerts.
2. In the 'Diary Alerts' tab select 'Enable Diary Alerts' (see Figure 239).

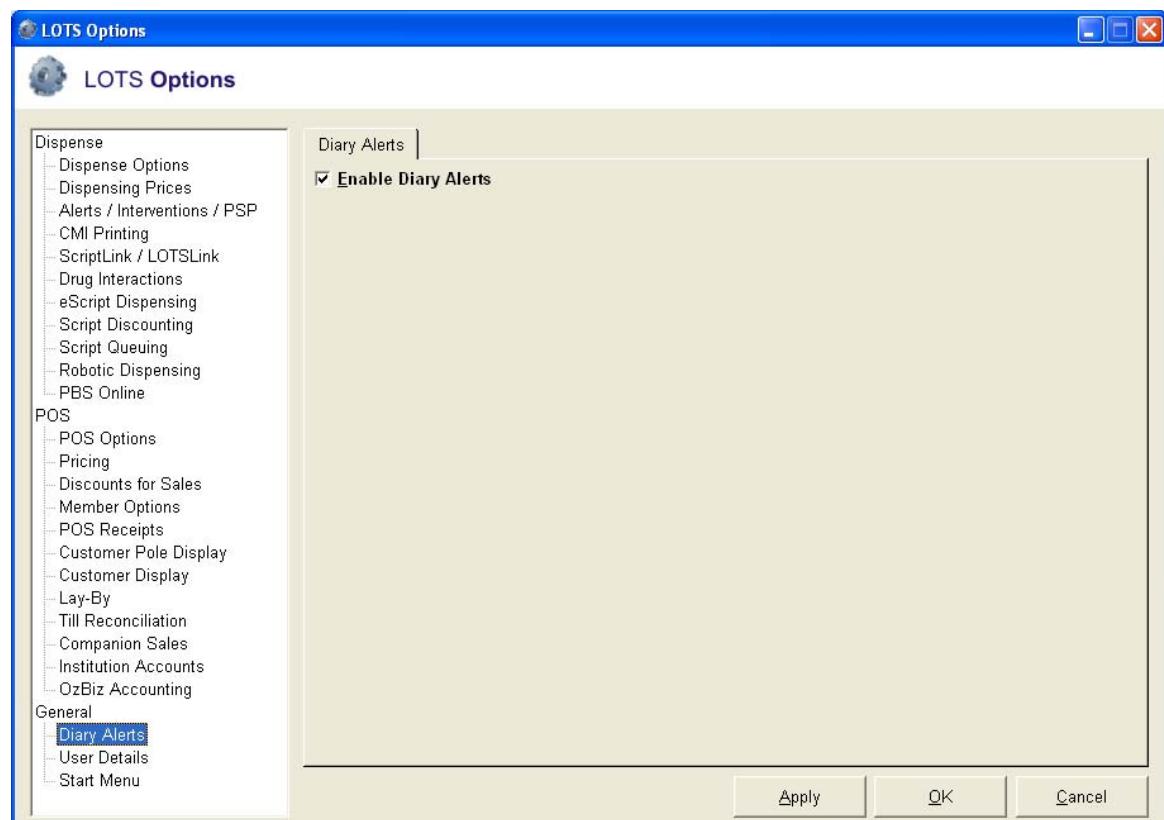


Figure 239

5.4.2 Creating A Diary Alert

1. If you have new diary messages an yellow envelope icon will appear in your system tray (see Figure 240).
2. If there are no Diary Alerts for a staff member a grey envelope will be shown.
3. The Diary application can be accessed from the LOTS Start Menu via **Tools** → **Utilities** → **Staff Utilities** → **Diary**.

Note: You can also double click on the envelope in the system tray to open it.

4. Selecting Diary will display the 'Messages' window (as shown in Figure 241).

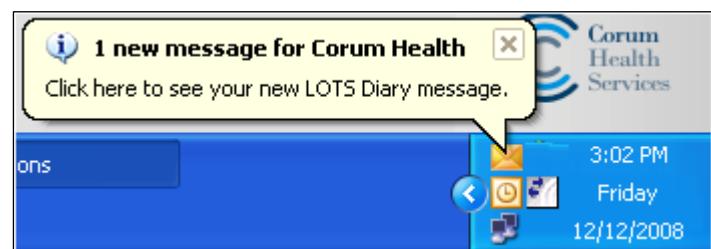


Figure 240

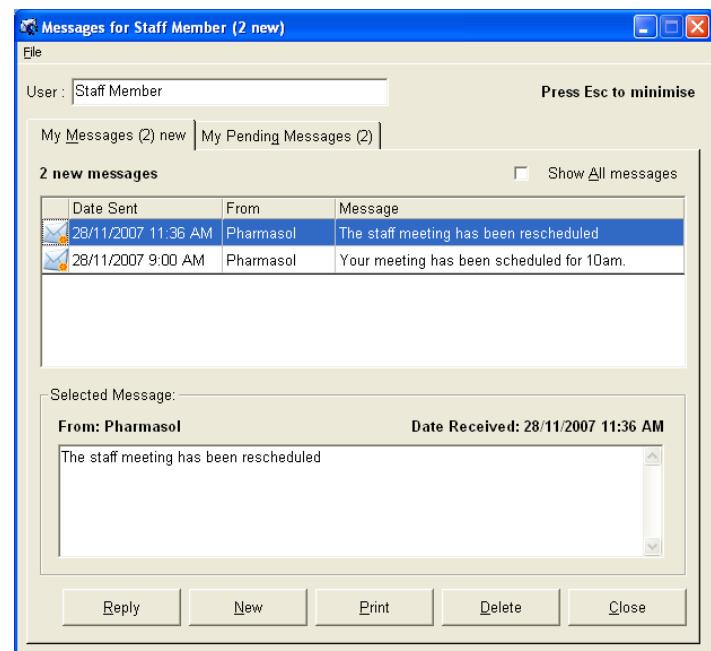


Figure 241

5. Selecting 'New' will display the 'New Message' window (as shown in Figure 242).
6. In the 'Send To' window select the staff member(s) you want to send the message to.

Note: You can send a diary message to yourself. You can also send a diary message to everyone (including yourself) by selecting 'All Staff'.

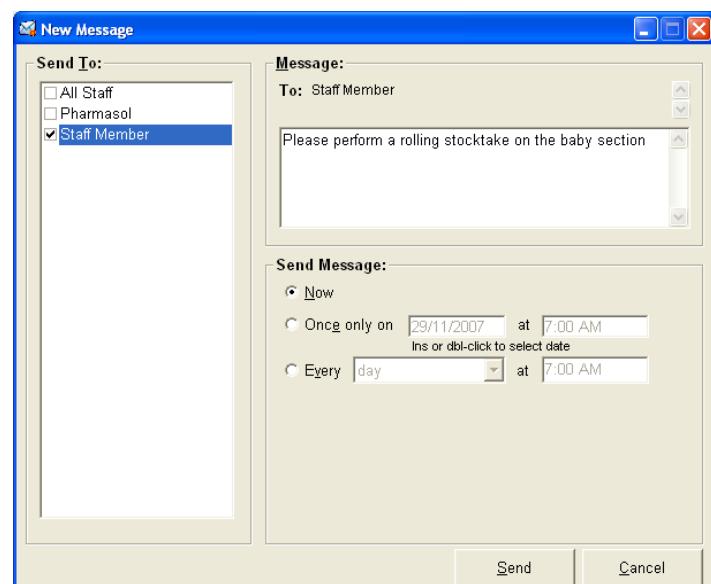


Figure 242

7. Then in the 'Message' field type in the message.

- Select when you would like the message to be displayed. There are three types (as shown in Figure 243):

- Now** – this will appear the next time the staff member logs on (enters their Staff ID).
- Once only on** – This option allows you set the date and time of when you want the message to appear. If the staff member is not working at that time the message will appear the next time they enter their Staff ID.
- Every** – This option allows you to set a recurrence type (day, week, month, first day of month or last day of month) and a time. Once again if the staff member is not working at that time the message will appear the next time they enter their Staff ID.

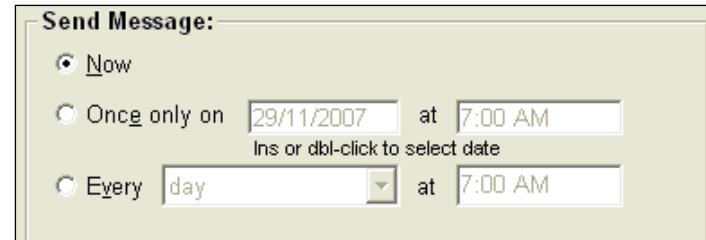


Figure 243

- Once complete click on the 'Send' button.
- The message (assuming 'Send Message' was set to 'Now') will appear on the PC that the staff member is logged on to.
- Staff members can at anytime view all the messages they have been sent in the 'My Messages new' tab.
- To reply to the message, simply click on 'Reply' button and this will open the 'new message' window with the recipient (the person who sent you the message) already ticked.

Note: While the recipient is already ticked you can also add more staff members to your reply.

- Any unread messages will be shown in your 'My Messages new' tab with an orange star on top of a closed envelope icon, while a read message will be displayed with an open envelope icon (as shown in Figure 244).

Date Sent	
	16/11/2007 4:39 PM
	16/11/2007 4:39 PM

Figure 244

- If you wish to delete a message after you have read it simply highlight the message and click on the 'Delete' button. This will remove the message from your 'My Messages' tab.
- You can view all your messages, including the ones you have deleted by ticking the 'Show All messages' tick box. The deleted messages will be shown as an unopened envelope with a red 'X' on it (as shown in Figure 245).
- If you have created a message you want to assign to a staff member at a later date, these message(s) will be saved in your 'My Pending Messages' tab.

Date Sent	
	16/11/2007 4:39 PM
	16/11/2007 4:39 PM

Figure 245

Note: All diary messages can be printed to the report printer. In addition, for security purposes, if LOTS is unused for more than 20 minutes, the 'My Messages' screen is blanked out and the staff member will have to re-enter their Staff ID to activate this screen again.

6 Price Update

The LOTS Price Update application allows you to process agency and wholesaler updates using the same process, but it also allows you to set departments and sub departments for all new products. Use price updates to update pricing and quantity breaks for existing products and/or to add new products

6.1 Nominate Supplier

Nominate Supplier is a secure and simple way for you to receive your price updates electronically. Instead of your staff having to check for price updates every month, this feature will allow you to nominate the supplier price updates you wish to receive. Corum Messaging will deliver these price updates to your computer as they become available. The following is a step by step process for setting up your nominated suppliers.

Note: If you are an RPM client you will not need to do this as this will be set up at your Head Office.

1. The 'Nominate Suppliers' Icon should be automatically installed onto your desktop (see Figure 246).
2. When you double click on the Nominated Suppliers Icon the 'Supplier Pricing Information Download Selector' window will appear (see Figure 247).

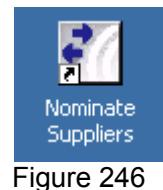


Figure 246

Note: The Nominate Suppliers icon will only be installed onto the Master computer.

3. The 'Selections' tab will list all Wholesalers and Agent files which are available electronically.

Note: The first time you run 'Nominate Supplier' LOTS will automatically detect the suppliers you normally use.

4. You can modify the settings to add or remove suppliers by ticking or un-ticking the tick box against either the Wholesalers or Agents.

Corum Messaging will automatically send updated price files for all suppliers you have selected.



Figure 247

5. The list of suppliers is presented in alphabetical order. To search for a supplier, simply type the name or part of the supplier name in the search box (Figure 248).

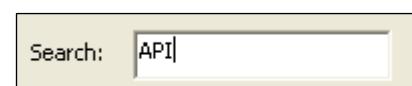


Figure 248

6. When you have finished selecting all of the suppliers you wish to receive updates from, select the Save button.

7. You will be prompted to save your selections (Figure 249). To save your changes, select 'Yes'. A confirmation message will be displayed. Select 'OK' to finish.
8. The suppliers you have nominated will automatically be recorded with Corum Messaging and within 48 hours the new price files will be downloaded to your computer and can be applied using the normal price update process (LOTS Main Menu → Tools → LOTS Updates → Price Update).

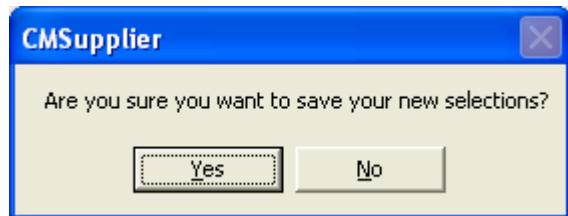


Figure 249

6.2 Price Update Notification

When a new Price Update is received via Corum Messaging a notification will now appear on the right-hand side of the LOTS Start Menu. This Price Update Notification, similar to the drug update, will appear as flashing Blue text.

By placing your mouse over the price update text a list of all new price updates will be shown (see Figure 250).

Click on the notification to be taken directly to the 'LOTS Product Update' window.

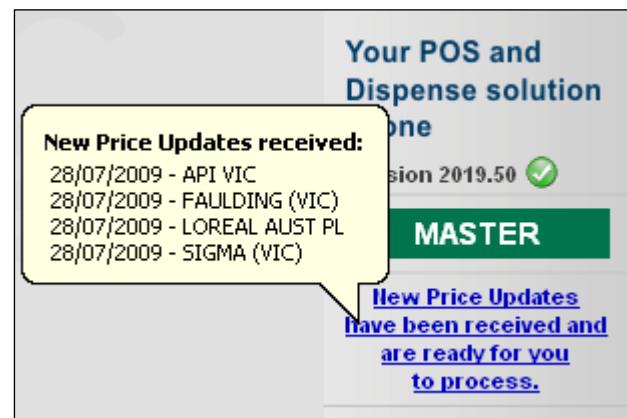


Figure 250

6.3 Performing The Price Update

1. To perform a Price Update (agency or wholesaler) navigate from the LOTS Main Menu → Tools → LOTS Updates → Price Update.

Note: If you are a Head Office site, you will receive the following message (see Figure 251). You should check with your Head Office to see if you should be running your price updates.



Figure 251

2. This will display the 'LOTS Product Update' screen (see Figure 252).
3. If you do not order through 'PharmX', then the first time you open the 'LOTS Program Update' the screen will be blank.
4. To link new suppliers click on the 'Show All' button this will display the 'Matching Suppliers' window (see Figure 253).
5. After selecting 'Show All' you will then need to link the 'Corum Defined Suppliers' to your Local Suppliers' by clicking in the Local Supplier field (see Figure 254).

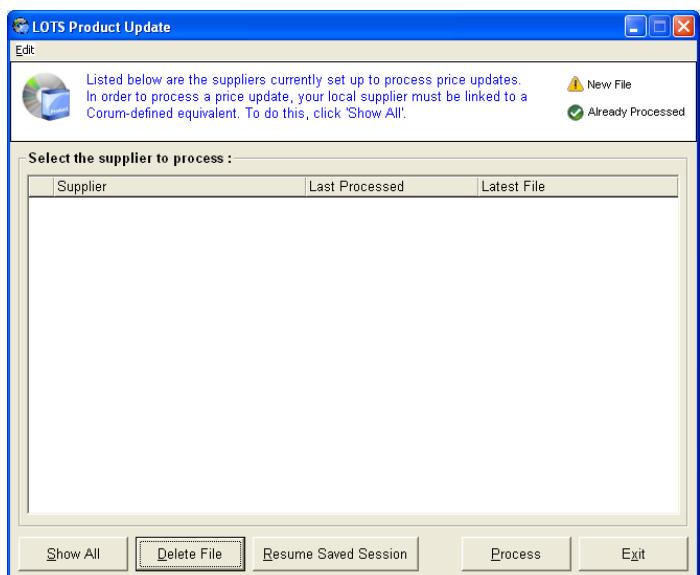


Figure 252



Figure 253

- On the left hand side ('Corum Defined Supplier' column) highlight the supplier you wish to process. Once highlighted the right hand side ('Local Supplier') column will display a drop-down list allowing you to select a local supplier (see Figure 254).

- You must do this for all suppliers you wish to process price updates for. Once complete select 'Close'.
- After selecting 'Close' you will be returned to the 'LOTS Product Update' window. The window will always show the primary supplier in bold and at the top of the list. The other suppliers will be shown in alphabetical order (see Figure 255).

Note: If a supplier has been added that you do not wish to include simply highlight the row and select 'Delete File'.

- Highlight the supplier you wish to process and select 'Process'. This will display the 'Price Update' window (see a snapshot of this window in Figure 256).
- The window (Figure 256) shows the PLU, Description, List Cost (Old & New), Markup, Gross Profit (Old & New, Retail (Old & New), GST (Yes, No or Free) and Recommended Retail Price.

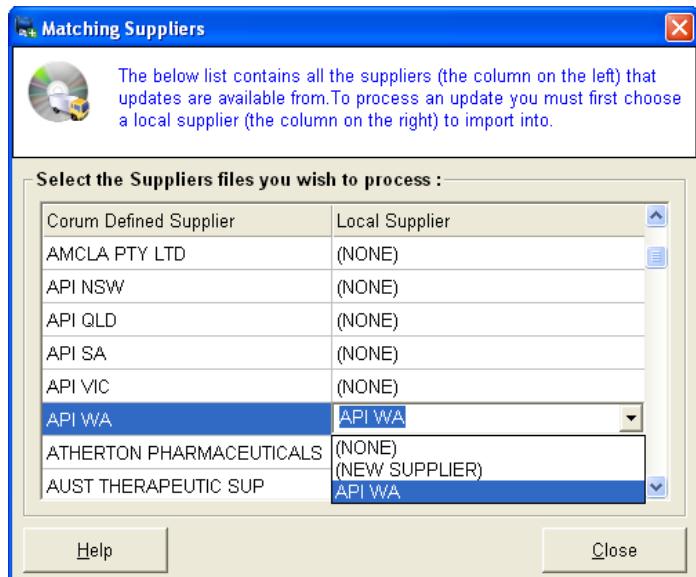


Figure 254

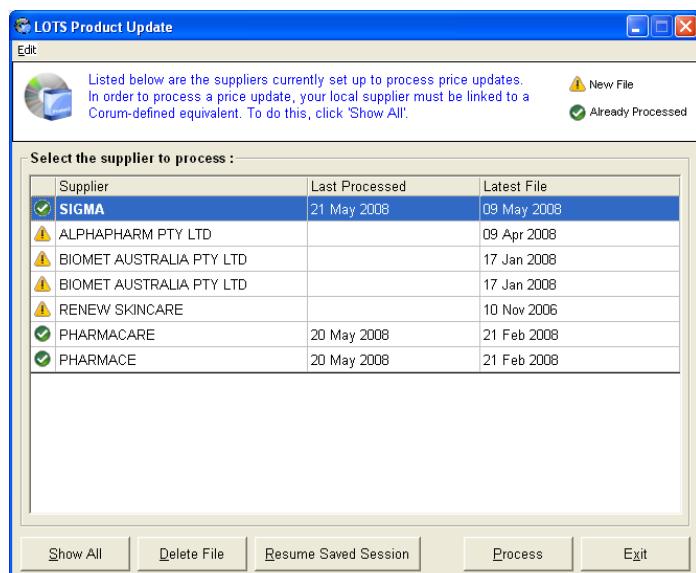


Figure 255

*	PLU	Description	List Cost Old	List Cost New	Markup	GP Old	GP New	Retail Old	Retail New	GST? Y/N/F	Real Cost	Sugg. Retail
246107	360 DEGREE SENSITIVE T/B		\$3.94	\$4.38	38%	27%	41%	\$5.42	\$6.65	Yes	\$3.94	\$0.00
235016	A/SEARCH AVEO TSD A/SNORE AID		\$128.77	\$128.40	50%	33%	33%	\$193.16	\$192.60	Free	\$128.77	\$0.00
654310	A/SEARCH B/ALERT PF METER LOW		\$31.00	\$31.86	33%	25%	27%	\$41.33	\$42.40	Free	\$31.00	\$0.00
654302	A/SEARCH B/ALERT PF METER STD		\$29.67	\$31.86	33%	25%	30%	\$39.56	\$42.40	Free	\$29.67	\$0.00
212881	A/SEARCH BLOOD/P DIG AL432B		\$83.92	\$95.37	43%	30%	44%	\$120.01	\$150.00	Yes	\$83.92	\$0.00
444758	A/SEARCH DAC PREM PILLOW COVER		\$29.30	\$28.04	65%	39%	42%	\$48.35	\$50.90	Yes	\$29.30	\$0.00

Figure 256

- The New List Cost, Markup, New Retail and Recommended Retail Price fields can all be edited.

12. Each product listed also has a legend to indicate its status.

Legend	Description
	New Item
	Item With Price Decrease
	Item With Price Increase

13. By using the tick boxes provided (Figure 257) you can choose products you wish to display.
14. You will also need to choose which option to set your retail to, there are two options (see Figure 258):
- **Use Supplier's Sugg. Retail** – 'Use Supplier's Sugg. Retail' will set your retail price to the recommended retail price as defined by the supplier
 - **Use List Cost + Mark-Up** – This will set the retail price based on Current Mark-Up multiplied by New List Cost. This is the default option.
15. There is also a search box that will allow you to search for specific items (see Figure 259). Ensure you tick the 'Display Items Matching This Description/PLU' tick box before clicking 'Select'.

16. If you need to stop half way through processing your update, you can save changes by selecting 'Select' (see Figure 260). Saving a session allows you to return to it at any time.
17. Once you have finished setting your items select 'Process' (see Figure 261).

Note: You can select all items by clicking on the 'Select All' button. Under 'Display Options' you can select 'Price Increases' and 'New Products'.

18. After selecting 'Process' a 'Select Sub Department' window (Figure 261) will appear if you have new products to process. This window will allow you to define sub-departments for new products to be allocated to.



Figure 257



Figure 258

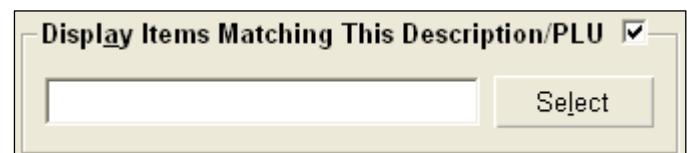


Figure 259



Figure 260

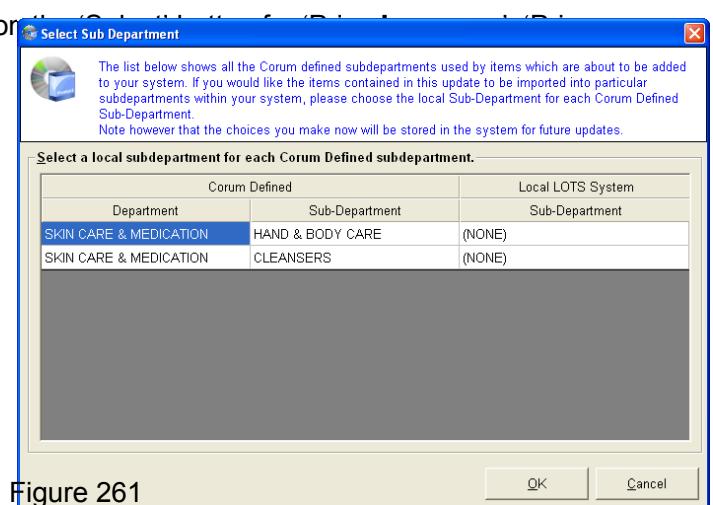


Figure 261

19. For the purpose of grouping similar products, Corum has classified each product into a Department and Sub Department. These are displayed on the left hand side of the window.

20. If you would like the items contained in this update to be imported into particular sub-departments with your system, please choose the local sub-department for each Corum defined sub-department

21. To link one of your defined sub-departments to a 'Corum Defined' one, double-click in the LOTS 'Sub-Department' field. This will display a drop-down box allowing you to select from a list of your defined sub-departments (as shown in Figure 262).

22. Once you have set one of your sub-departments this will remain saved for all future product updates.

23. For example if you set 'Hair Products' as the LOTS sub department for the Corum Defined 'Baby → Shampoo Oils' then all future products under 'Baby → Shampoo Oils' will automatically get assigned to 'Hair Products' (see Figure 263).

Note: To make changes to your sub-department at a later date use the 'Modify Departments' application (for more information refer to section 9 – Modify Department/Sub-Department).

24. When complete select 'OK'. Selecting 'OK' will display the 'Update Settings' window (see Figure 264).

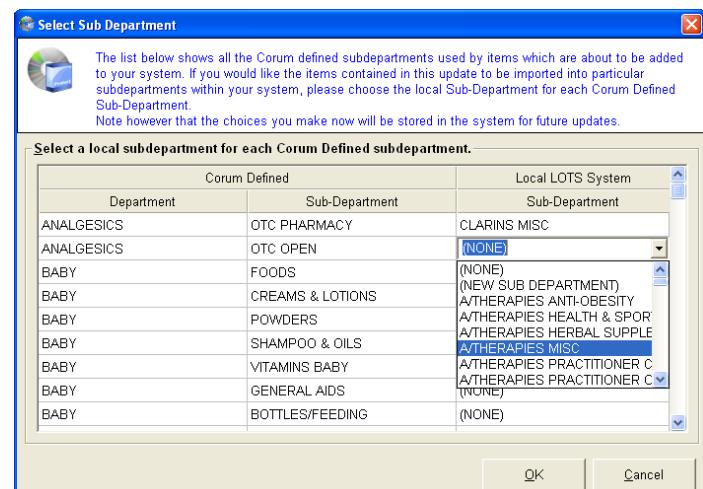


Figure 262

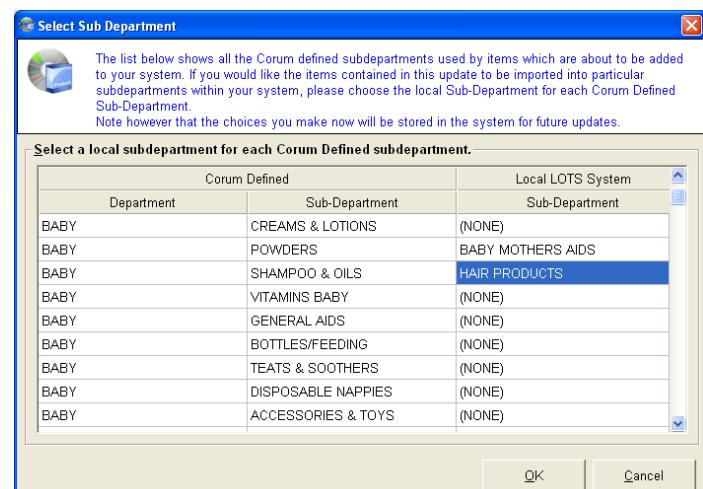


Figure 263

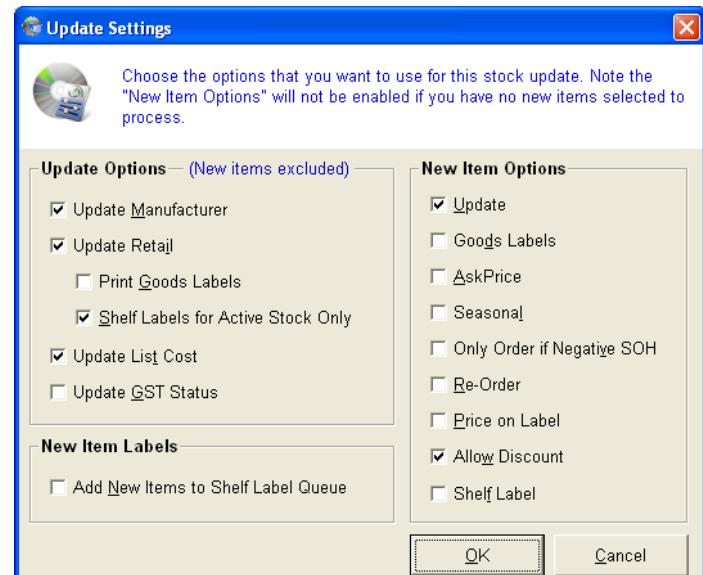


Figure 264

25. There are the three sections in this window the first is 'Update Options'. 'Update Options' (Figure 265) has four main settings relating to the items, these are:

- **Update Manufacture** – If the manufacturer for the item has changed since the last order, then (if ticked) this will update the item with the new manufacturer.
- **Update Retail** – If the retail price for the item has changed since the last order then (if ticked) this will update the item with the new retail price.
If this option is ticked two sub options become available they are:
 - **Print Goods Labels** – If this option is ticked it will print goods label (product sticker) for all items being processed.
 - **Shelf Labels for Active Stock Only** – This will add shelf labels to the queue for active stock only.
- **Update List Cost** – If the list cost for the item has changed since the last order then (if ticked) this will update the item with the new list cost.
- **Update GST Status** – If the GST status for the item has changed since the last order then (if ticked) this will update the item with the new GST status.



Figure 265

26. The second section is 'Labels'. 'Labels' (Figure 266) has one setting:

- **Add New Items to Shelf Label Queue** – This will add all new items to the shelf label queue.



Figure 266

27. The final section 'New Item Options' (Figure 267) only relates to new items being processed and relates directly to the 'Stock Flags' options in 'Stock Cards'. These option are:

- **Update** – This option should only be activated (ticked) for sites that are part of a 'Checkout' Head Office set-up with a head office store and branch(es).
- **Goods Labels** – If ticked this option will generate a label displaying the product description, barcode and PLU number. If you wish the retail price to also be displayed on the goods label then the 'Price on Label' option must also be ticked.
- **Ask Price** – Stock items like photo processing, repairs, hire charges (which can have a different price each time they are sold) should have Ask Price ticked. Therefore each time one of these items is sold the salesperson will be asked to enter the price for this sale.
- **Seasonal** – This option is only ticked in situations where the sale of specific products varies dramatically from one season to another (e.g. sunscreen in summer).
- **Only Order if Negative SOH** – if this is ticked it will only order when the SOH is less than zero.
- **Re-Order** – Normally ticked. If not, the item will not be reordered and will not appear on stock take sheets and certain reports. Used for discontinued lines that you want to run out.



Figure 267

- **Price on Label** – Tick this if you want the price to be shown on all stock labels.
- **Allow Discount** – If ticked will allow a discount to be applied to this product.
- **Shelf Label** – This option should be ticked if you wish to create a shelf label for the item.

6.4 Update Promotions

- To update a promotion navigate from the LOTS Main Menu → Tools → LOTS Updates → Update Promotions.
- After selecting the 'Update Promotions' button the 'LOTS Promotion Update (UPI)' window will be displayed (as shown in Figure 268).
- Ensure that the 'C:' drive is selected from the 'Update File drive' drop-down list (as shown in Figure 269).
- Click 'Process' to proceed with the update.
- After selecting 'Process' the 'Promotion Details' will be loaded and the status bar will be shown (see Figure 269).

Note: If one of the promotion products has the same barcode as a product currently listed in your stock cards, a message will be displayed. The message lists the barcode and notifies you that the barcode will not be added for the promotion product.

- Once the process is complete a list of products not in LOTS Stock Cards will be displayed (see Figure 270). To match a product to an existing stock card, select 'Select Matching Item'.
- Use the 'Add Item' tick boxes to select which products you wish to add. After selecting the products select 'Add & Continue' to add the products to Stock Cards.
- Once the products are added you will be asked if you would like to load Specials for the promotion. Select 'OK' to load the specials.
- After selecting 'OK', the specials will be processed (see Figure 271).
- Once complete you will receive a confirmation message.
- Note:** You will then need to proceed with activating your Auto Specials.

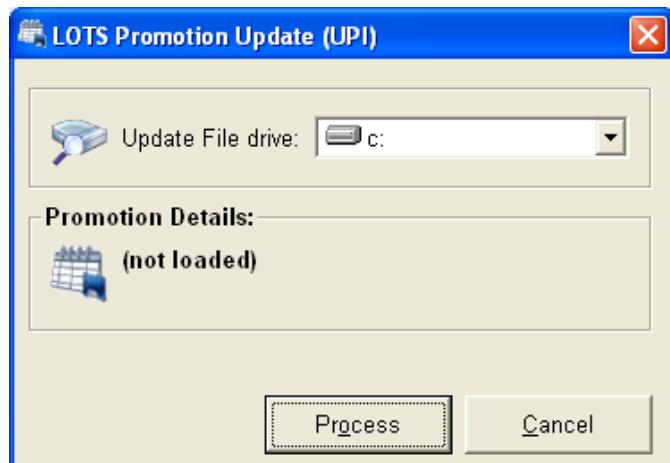


Figure 268

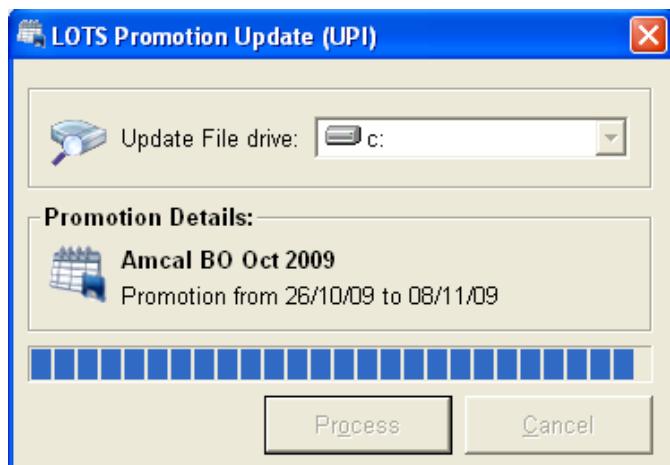


Figure 269

Promotion Update						
Amcal BO Oct 2009 Promotion from 26/10/09 to 08/11/09						
The following items were not found in your stock file. Click 'Select Matching Item' to match to an existing stock item, then click 'Add & Continue' to add the remaining selected items to the stock file.						
<input type="checkbox"/> UPI <input type="checkbox"/> Partcode <input type="checkbox"/> Barcode <input type="checkbox"/> Item Description <input type="checkbox"/> Cost <input type="checkbox"/> Retail <input checked="" type="checkbox"/> Add Item						
116528	800425	09300615962603	CUSSONS VL SOAP 6 GNTL CTN12	\$40.49	\$35.99	<input checked="" type="checkbox"/>
196466	862961	9300663460900	LYNX DEOD SPRY FEVER 100G	\$4.97	\$4.99	<input checked="" type="checkbox"/>
182935	849786	9300663458103	LYNX S/GEL HOT FEVER 375ML	\$5.40	\$4.99	<input checked="" type="checkbox"/>
182936	849760	9300663456963	LYNX S/GEL THAI MASSAGE 375ML	\$5.40	\$4.99	<input checked="" type="checkbox"/>
183143	863302	0000093707725	MITCHUM A/P R/O HYPOALLERG 50	\$3.26	\$2.79	<input checked="" type="checkbox"/>
47403	773695	0000000779595	NAIR PRETTY DUO SACH 15ML	\$2.66	\$2.99	<input checked="" type="checkbox"/>
189962	860767	6937266700761	SCHIC WOM INTUIT PLUS SENS KIT	\$10.46	\$9.99	<input checked="" type="checkbox"/>
189960	860809	6937266700778	SCHICK INTUIT PLUS MOIST BLADE	\$11.08	\$12.49	<input checked="" type="checkbox"/>
187536	854067	8886394602219	XNDO PUDDING BANANA 20X50G	\$53.80	\$3.99	<input checked="" type="checkbox"/>
187538	854042	8886394602233	XNDO PUDDING CHOC BRY 20X250G	\$53.80	\$3.99	<input checked="" type="checkbox"/>
160131	838029	8886394601939	XNDO WHITE FISH&HERB RISS 5PK	\$26.20	\$6.99	<input checked="" type="checkbox"/>
184043	850750	9314057006283	ZEP CLEAR NASAL SPRAY 30ML	\$6.98	\$5.99	<input checked="" type="checkbox"/>
184044	850768	9314057006290	ZEP C/L NAT NS/SPRY 75ML	\$6.47	\$7.99	<input checked="" type="checkbox"/>

Figure 270

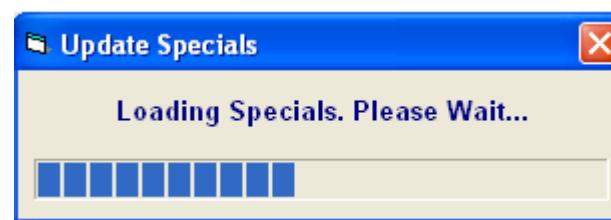


Figure 271

7 Orders

7.1 Orders Main Screen

To effectively navigate around the LOTS Order Main screen, it is necessary that you be familiar with each of the components that are located on it.

These components are referred to throughout this module as:

1. 'Drop down menus' located at the top of the screen (as shown in Figure 272).
2. 'Menu buttons' (as shown in Figure 273).

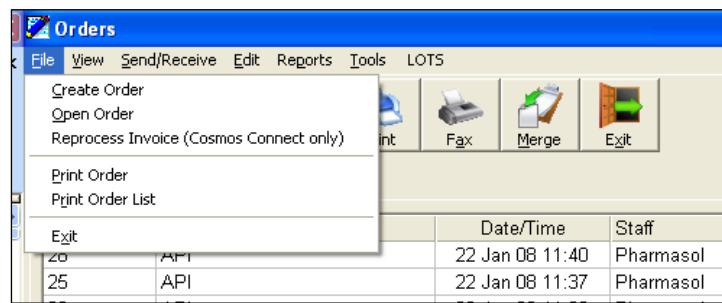


Figure 272

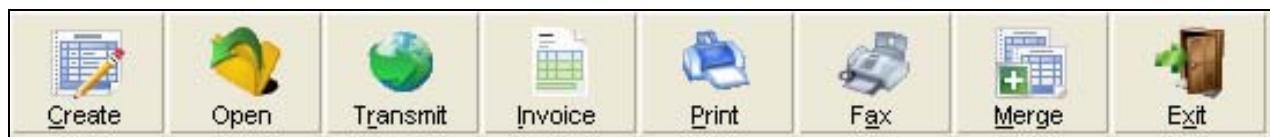


Figure 273

3. The 'Orders' tab (as shown in Figure 274).
4. The 'Invoices' tab (as shown in Figure 274).

Orders		Invoices			
Order	Supplier	Date/Time	Staff	Value	Status
28	API	22 Jan 08 11:40	Pharmasol	\$320.14	New
25	API	22 Jan 08 11:37	Pharmasol	\$6.80	New
23	API	22 Jan 08 11:36	Pharmasol	\$6.80	New

Figure 274

Note: From the Orders/Invoices tab, if you click on the row headings this allows you to sort the orders below by what you have selected. For example, if you select the 'Date/Time' column heading then this will sort the orders by the most recent date. If you select the 'Date' heading again the order will change to sort the orders by the oldest date.

7.2 The Definition Of 'Status' For Orders

In the LOTS Orders Module, your order will go through many different phases (known as status) before it can be considered closed. Below is an explanation of each of these different phases.

Order Status	Definition
New	This is when an order has been created but has not been sent to a supplier by electronically transmitting it or by faxing.
Ordered	This is when an order has been sent to the wholesaler either by electronically transmitting it or by faxing.
Acknowledged	This is when an invoice has been collected electronically from the wholesaler or if you have manually changed the 'Status' of the order to 'Acknowledged'.
Additional-Acknowledged	This is when an invoice has been collected electronically from the wholesaler and additional invoices have been returned in that electronic collection. For example: if an order was placed over the phone to the Wholesaler, these will be delivered to your LOTS system as an additional-acknowledged order.
Reorder	This is when a wholesaler cannot fulfil an order and the system generates another order which may consist of all the out of stocks and items that are on back order. You can also place items on re-order manually by selecting the 'order item' button in stock cards (see section 3.9 – Stock Card Menu Buttons). Items in the re-order file can be incorporated into a new order when created
Delivered	To be able to view completed orders and orders that have been 'delivered' from the main Orders screen select the ' <u>View</u> ' drop down menu and choose the option of ' <u>Completed</u> '. This is when an invoice has been order delivered and the ordering process is complete. This order will disappear from the current Orders screen in both the Orders and Invoices tab.
Backorder	Indicates to LOTS that these products have been placed on backorder and will be placed into an order with status 'Backorder'. When backorder stock is released the Additional-Acknowledged invoice will match to the appropriate product in the backorder file and remove it.

7.3 Creating An Order

An order can be created from any computer; it does not need to be sent from the Master computer.

To create an order:

1. Navigate from the LOTS Start Menu → Orders.
2. The Orders screen will be displayed (as shown in Figure 275).
3. Select the 'Create' menu button
4. The 'Create New Order' screen will then display (as shown in Figure 276).
5. In the Supplier field, select the supplier that you wish to use by selecting them from the drop down list provided.
6. Use the 'Item Selection' options to filter for products you wish to order. Alternatively by ticking the 'OTC Items' or the 'Dispensary Items' tick boxes you can specific what type of products you wish to place an order for.

Note: For information regarding flagging stock items as OTC or Dispensary see section: **3.4 – 3 Ordering Tab**.

7. Place a tick in the 'Add Reorders' option if you would like to add your wholesaler's 'out of stock' products to the order.
8. Select a 'Period to Order for' by selecting either of the below two options:
 - Until end of billing period
 - Specify Period <number> weeks
 Both these options will give you a suggested order which is calculated by LOTS looking at your current SOH, Sales History and Expected Sales for the month (for more information on these options refer to sections: **7.3.1 – Until End Of Billing Period & 7.3.2 – Specify Period In Weeks**).
9. Select the 'OK' button to generate your order.
10. To modify this order refer to section: **7.6 – Modifying An Existing Order**.

Order	Supplier	Date/Time	Staff	Cost	GST	Total Value	Status
16989	CUSTOM SUPPLIER 200	27 Nov 07 13:53	TANYA	\$7,045.67	\$704.86	\$7,753.43	Ordered
16985	Reorder	17 Dec 07 11:09	TANYA	\$3,281.23	\$320.60	\$3,601.73	Reorder
16926	API	31 Dec 07 13:54	Wholesaler Generated	\$69.66	\$6.86	\$76.42	Additional-Acknowledged
16927	API	31 Dec 07 16:32	JESSICA	\$1,008.47	\$91.21	\$1,100.68	Acknowledged
16933	API	02 Jan 08 16:49	JESSICA	\$2,260.48	\$164.46	\$2,424.94	Acknowledged
16934	API	02 Jan 08 16:42	JESSICA	\$36.66	\$3.86	\$42.43	Acknowledged
16935	API	03 Jan 08 09:45	Wholesaler Generated	\$72.48	\$7.25	\$79.73	Additional-Acknowledged
16936	CUSTOM SUPPLIER 141	03 Jan 08 09:46	CATHERINE	\$411.66	\$41.17	\$452.83	Ordered
16937	CUSTOM SUPPLIER 111	03 Jan 08 09:47	CATHERINE	\$990.09	\$99.09	\$1,089.98	New
16953	SIGMA1	26 Sep 08 15:51	H1015	\$0.00	\$160.91	\$160.91	New
16954	API	12 Nov 08 10:24	Corum Health	\$317.09	\$66.61	\$383.70	Back-Ordered
16955	SIGMA1	16 Nov 08 11:02	Corum Health	\$191.01	\$19.10	\$210.11	New
16959	SIGMA1	12 Jan 09 11:57	Corum Health	\$40.00	\$0.00	\$40.00	Ordered
16962	SIGMA1	27 Mar 09 14:39	Corum Health	\$273.76	\$37.38	\$311.14	New
16988	CUSTOM SUPPLIER 195	08 Apr 09 14:02	Corum Health	\$1,011.60	\$89.28	\$1,100.88	Ordered

Figure 275

Supplier to Order from	Supplier : API
Item Selection	
Department	<input type="checkbox"/>
Sub-Department	<input type="checkbox"/>
Stock Group	<input type="checkbox"/>
Inclusions	
<input checked="" type="checkbox"/> OTC items	<input type="checkbox"/> Reorders
<input checked="" type="checkbox"/> Dispensary items	
Exclusions	
<input type="checkbox"/> Exclude Items with no sales in current month plus <input type="button" value="0"/> months	
<input type="checkbox"/> Exclude quantities already on order	
Period to order for	
<input checked="" type="radio"/> Until end of billing period (30) <input type="radio"/> Specify Period <input type="text" value="4"/> weeks <input type="radio"/> Blank Order <input type="radio"/> Replace Items Sold <input type="radio"/> Since Last Replacement Order <input type="radio"/> Since <input type="text"/>	
Rounding Threshold	
Quantity must be at least <input type="text" value="50%"/>	
Used for rounding order quantities, more specifically applied to carton sizes and/or minimum order amounts.	

Figure 276

7.3.1 Until End Of Billing Period

Select the 'Until end of billing period' order option to generate your daily wholesaler order.

This type of order is used for generating a daily wholesaler order. It looks at the SOH and the expected sales per month for each item available from the selected supplier to determine what stock requires ordering. In addition it also considers whereabouts in the billing month you are and takes this into account when ordering; thus an order generated at the start of the billing period will be vastly different to an order generated near the end of the billing month.

At the beginning of the billing period the orders tend to be larger, tapering off as the month progresses, as LOTS considers the trading terms you have with your wholesaler and maximises the amount of time you have the stock in the pharmacy before you need to pay for it.

If you find that the suggested orders are a little too generous or conservative for your pharmacy's needs you can modify the liquidity settings (for more information on this option refer to section: **7.3.3 – Liquidity Setting**).

To change the billing period, navigate to the 'Create New Order' window → Edit drop-down menu → Set Billing date. Then simple enter in the date the next invoice is due to your primary wholesaler (see Figure 277).

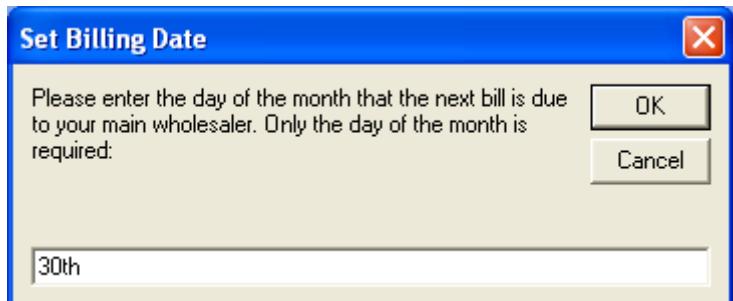


Figure 277

7.3.2 Specify Period In Weeks

Use this order type for direct supplier orders and for bulk orders.

When selecting a period of weeks LOTS considers your current SOH and the expected sales per month of each product available from the selected supplier and generates a suggested order for enough stock to last the selected period plus some buffer stock as determined by the Liquidity setting (for more information on this option refer to section: **7.3.3 – Liquidity Setting**).

7.3.3 Liquidity Setting

The amount of buffer stock LOTS includes in a suggested order can be modified via the 'Liquidity Setting'. If you find that the suggested orders are a little too generous or conservative for your pharmacy's needs you can modify the liquidity setting. To change the liquidity settings navigate to the 'Create New Order' window → Edit drop-down menu → Set Liquidity (see Figure 278). The default liquidity setting is 50, which is designed to achieve maximum efficiency of both labour and capital. The liquidity setting can be adjusted at any time as required, for example you might adjust the liquidity to allow for pre/post tax payment time cash availability.

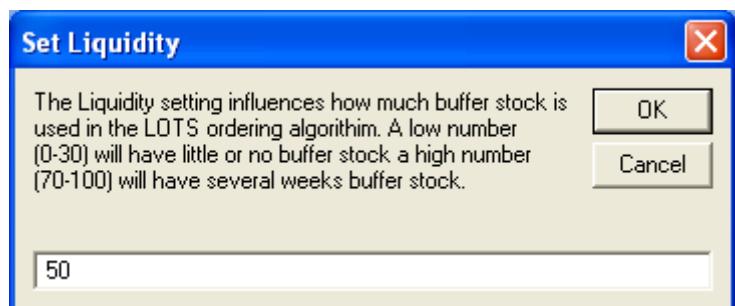


Figure 278

A lower liquidity setting of 40 or 30 indicates to LOTS that you're trying to scrape through a recession period of business without reducing excess staff. You have excess labour and a capital shortage so LOTS will run the stock lower, releasing capital at the expense of more frequent, smaller orders

A high liquidity setting of 60 or more indicates to LOTS the pharmacy is more 'liquid' and LOTS will expand the stock where appropriate. LOTS will suggest fewer, bigger orders. The orders will more often rounded up to the wholesaler's pack quantities, which generally attract a better cost price, and staff need spend less time unpacking fewer orders.

7.3.4 Rounding Threshold

The rounding threshold defines the percentage at which the order quantity will be rounded up or down. The default value of 50% (see Figure 279) is most effective for carton and minimum order quantities.

For example, if the minimum order quantity of a particular item is 10 and the system generated order quantity is 7 then because 7 is more than 50% of the minimum order quantity, 10 will be ordered.

In the above case all quantities above 50% (i.e. 5) and above will be ordered and quantities below 50% will not be ordered.

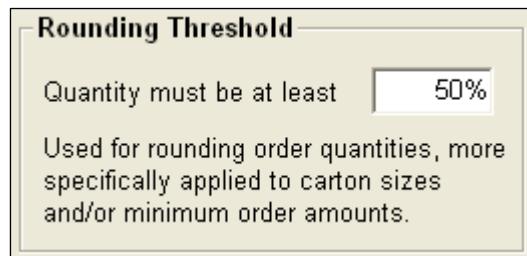


Figure 279

7.4 Creating A Blank Order

To create a blank Order:

1. Navigate from the LOTS Start Menu → Orders.
2. The Orders screen will be displayed, select the 'Create' menu button.
3. The 'Create New Order' screen will then display (as shown in Figure 280).
4. In the Supplier field, select the supplier that you wish to use by selecting them from the drop down list provided.
5. Under the 'Period to Order for' field, select the 'Blank Order' option.
6. You will notice that once the 'Blank Order' option is selected, all options under the 'Item Selection' heading will become greyed out.
7. Select 'OK' to proceed generating your order.
8. Your blank order will then display on the screen (as shown in Figure 281).
9. To add items to your blank order select the [insert] key. The 'Stock Search' window will display (as shown in Figure 282).
10. Type in the PLU, description or scan the barcode of the product that you would like to add to your order and press [Enter].

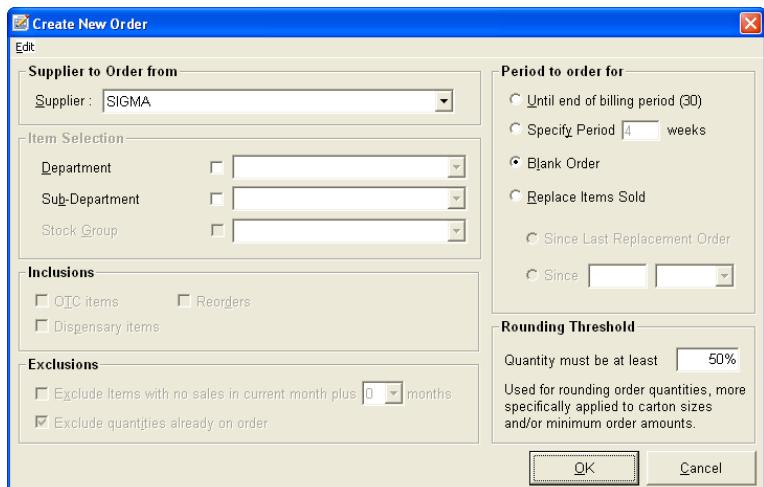


Figure 280

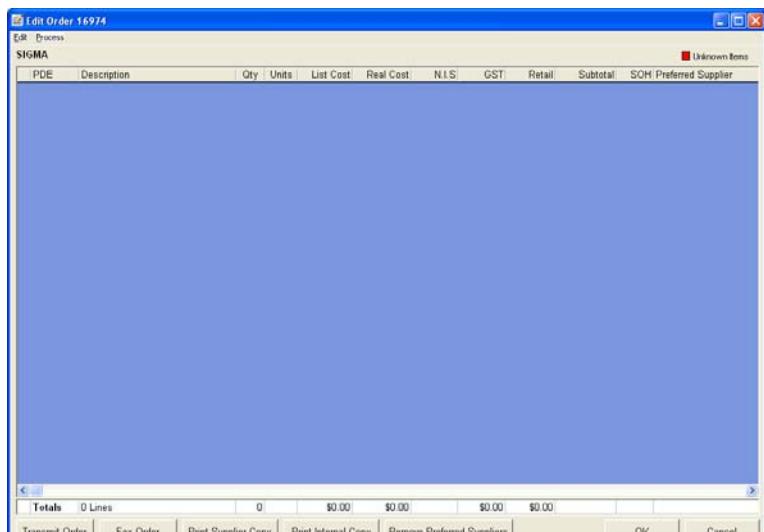


Figure 281

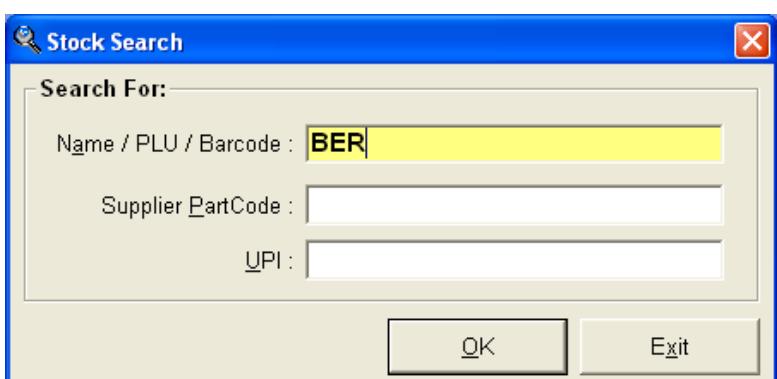


Figure 282

- A list of items matching what you have keyed in will be displayed (as shown in Figure 283). If only one match is found you will be taken directly to the product.

Select an Item from the list below

	PLU	UPI	Name	Pack	Manu.	List Cost	Real Cost	SOH	Retail
1	736785	9640	BEROCCA PERF EFF TAB 45	1		\$16.65	\$14.81	0	\$27.50
2	794552	8441	BEROCCA PERF ORIG EFF 15	1		\$7.25	\$6.28	0	\$13.95
3	631671	6462	BEROCCA PERF REG TAB 30	1		\$9.20	\$11.23	0	\$13.57
4	286141	17943	BEROCCA PERF REG TAB 60	1		\$20.42	\$20.42	0	\$24.67
5	640581	6958	BEROCCA PERFORM EFF 15	1		\$7.27	\$6.59	0	\$13.95
6	794560	108	BEROCCA PLAIN EFF 30	1		\$12.18	\$11.39	2	\$21.95
7	794586	2903	BEROCCA TROPICAL FLAVOR ...	1		\$12.18	\$11.39	0	\$18.95
8	008052		BEROTEC INHALER 100MCG 20...	1		\$4.22	\$4.22	0	\$6.33
9									

Drugs
 Inactive Stock
 Active Stock

Use the Up and Down arrow keys to scroll. Press 1-9 to select an item.
Select PgDn for next group.

Figure 283

- Highlight the product that you would like to add to the order and select the 'OK' button, alternatively you could also press the [enter] key to select the product.
- Once you have selected your product, the 'Edit Item' screen will be displayed (as shown in Figure 284).

- Key in the quantity you wish to order and then select 'OK'.

Note: The 'Sales History' displayed is for the last 12 months only.

- You will return to the 'Edit Order' screen.

- Repeat steps 13 - 15 until you have added all the products that you wish to order.

- Once your order is completed select the 'OK' button. This will save the order and return you back to the Orders Main Menu.

- To modify this order refer to section: **7.6 – Modifying An Existing Order.**

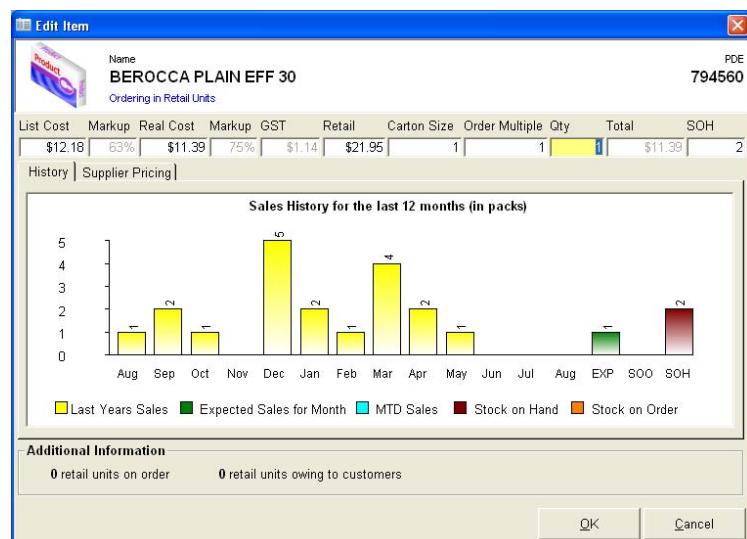


Figure 284

7.5 Creating A ‘Replace Items Sold’ Order

A replacement order is an order containing all the products sold as defined by your selections.

Note: It is not a predictive order; it simply orders what was sold without taking into account your SOH or expected sales. For generating suggested orders it is recommended you use the ‘Until End Of Billing Period’ or ‘Specify Period In Weeks’ order types instead (for more information on these options refer to sections: **7.3.1 – Until End Of Billing Period & 7.3.2 – Specify Period In Weeks**).

1. Navigate from the LOTS Start Menu → Orders.
2. The Orders screen will be displayed, select the ‘Create’ menu button.
3. The ‘Create New Order’ screen will then display (as shown in Figure 285).
4. In the Supplier field, select the supplier that you wish to use by selecting them from the drop down list provided.

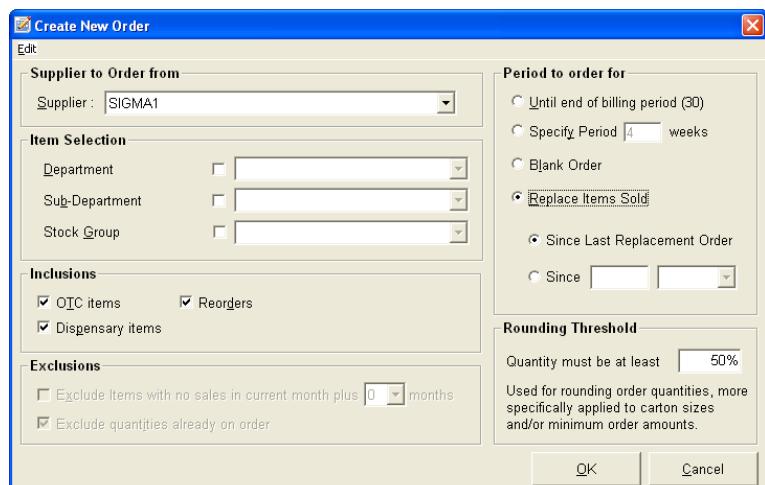


Figure 285

5. Under the ‘Period to Order for’ field, select the ‘Replace Items Sold’ option. This option will give you all the items sold/dispensed within an allocated period. For example if you sold 5 items in that period then you would be ordered 5.
6. There are two types of ‘Replace Items Sold’ options:
 - **Since Last Replacement Order** – Select this option if you would like to carry on from your last ‘Replace Items Sold’ order.
 - **Since** – Selecting this option will prompt you to enter in a date and time. Every item that has been sold since the date and time will be placed on the order.
7. Select the ‘OK’ button to generate your order.
8. To modify this order refer to section: **7.6 – Modifying An Existing Order**.

7.6 Modifying An Existing Order

To Modify an existing order:

1. Navigate from the LOTS Start Menu → Orders.
2. The Orders screen will be displayed.
3. Select the order you wish to modify by highlighting it.
4. Select the ‘Open’ menu button to display the order. Alternatively, you can double click on the order with the mouse to open it.
5. The items on the order will be displayed (as shown in Figure 286).
6. The product you wish to modify by highlighting it and pressing [Enter]. Otherwise the same action could be achieved by double clicking on the product.
7. Highlight the field you wish to change and key in the correct information (as shown in Figure 287). Fields you can change are:
 - List Cost
 - Real Cost
 - Retail
 - Qty
 - SOH

PO#	Description	Qty	Units	List Cost	Real Cost	N.I.S.	GST	Retail	Subtotal	SOH	Preferred Supplier
2430	AKIN ANTIODDANT DAY CRM 50N	1	1	\$20.99	\$20.43	\$0.00	\$2.04	\$36.95	\$20.43	1	
2304	AKIN BODY WASH LAVENDER 22	2	1	\$7.10	\$7.10	\$0.00	\$0.71	\$12.50	\$14.20	3	
2440	AKIN PURE EMERGENCY GEL 75	1	1	\$12.47	\$12.47	\$0.00	\$1.25	\$21.95	\$12.47	1	
2322	ALCHEMY DUO L/GRASS SHMP	2	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$22.66	0	
2325	ALCHEMY DUO LAV SHMP AVO	7	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$79.31	1	
2320	ALCHEMY DUO LAV SHMP MAC	3	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$33.99	2	
2325	ALCHEMY DUO MANDARIN SHMP	3	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$33.99	5	
2321	ALCHEMY DUO MARY SHMP JI	5	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$56.65	7	
2323	ALCHEMY DUO UNSC SHMP MAI	1	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$11.33	1	
2324	ALCHEMY DUO YLANG SHMP AV	3	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$33.99	12	
2327	ALCHEMY DUO YLANG SHMP MA	2	1	\$11.33	\$11.33	\$0.00	\$1.13	\$19.95	\$22.66	0	
2201	ALCHEMY JOJOBA COND 225ML	2	1	\$7.67	\$7.36	\$0.00	\$0.74	\$13.50	\$14.72	0	
2150	ALCHEMY LEAVE IN COND 150ML	1	1	\$9.63	\$9.06	\$0.00	\$0.91	\$16.95	\$9.06	1	
2102	ALCHEMY LEMONGRASS SHMP	2	1	\$7.67	\$7.36	\$0.00	\$0.74	\$13.50	\$14.72	0	
2203	ALCHEMY MACADAMIA/HEAT	1	1	\$7.67	\$7.36	\$0.00	\$0.74	\$13.50	\$7.36	1	
2105	ALCHEMY MANDERIN SHMP 225L	3	1	\$7.67	\$7.36	\$0.00	\$0.74	\$13.50	\$22.08	0	
2101	ALCHEMY MARY SHMP 225ML	2	1	\$7.67	\$7.36	\$0.00	\$0.74	\$13.50	\$14.72	0	
5210	USTREAM SPIRULINA ORGANIC	1	1	\$17.00	\$17.00	\$0.00	\$1.70	\$29.95	\$17.00	2	
5010	USTREAM SPIRULINA T 1000	2	1	\$60.20	\$60.20	\$0.00	\$6.02	\$105.95	\$120.40	0	
5002	USTREAM SPIRULINA T 200	8	1	\$17.00	\$15.72	\$0.00	\$1.57	\$29.95	\$125.76	3	
5202	USTREAM SPIRULINA VEGICAP	3	1	\$26.54	\$26.54	\$0.00	\$2.55	\$44.95	\$76.62	0	
4015	QSIILCA COLLOIDAL SILICA C 10C	1	1	\$34.31	\$0.00	\$0.00	\$0.00	\$50.95	\$0.00	2	
4010	QSIILCA COLLOIDAL SILICA C 50	7	1	\$20.58	\$17.01	\$0.00	\$1.70	\$26.45	\$119.07	0	
4002	QSIILCA GEL 500ML VALUE PAC	2	1	\$31.19	\$31.19	\$0.00	\$3.12	\$54.90	\$62.38	0	

Figure 286



Figure 287

Note: Do not enter your new invoice list and real cost here. New costs from new invoices are entered into the Invoice Analysis prior to order delivery (for more information on order delivery refer to section: **7.14 – Order Delivering An Order**).

8. Once you have made the required changes to the product, select the ‘OK’ button to save and go back to the order that you are editing.
9. Repeat steps 6 - 8 to continue editing products in your order as required.
10. If you are finished with your order select the ‘OK’ button to save the changes to the order.

Note: By selecting ‘Cancel’ you will lose all the changes you have made to this order.

7.6.1 Remove Preferred Suppliers

When editing an order you will note the last column ‘Preferred Supplier’. This column indicates which supplier (if any) has been marked as the preferred supplier for this item in Stock Cards (for more information refer to section: **3.7 – Supplier/Partcode Window**).

Note: If your LOTS is connected to a Head Office the ‘Preferred Suppliers’ may be set up and maintained by your head office.

The ‘Remove Preferred Supplier’ button is an instant way to remove from an order all the products that are preferably ordered from a different supplier. This feature is a powerful tool to help ensure that staff order products from the correct supplier

1. Determine if any preferred suppliers are indicated in the preferred supplier column.

Note: You may wish to sort the order by the preferred supplier column, by clicking in the column heading, so that you can view all the products from each preferred supplier together.

2. If there are any products from a preferred supplier that you do not wish to remove from this order you simply highlight them by clicking with the mouse.
3. Select the ‘Remove Preferred Supplier’ button. You will be prompted to select which supplier(s) you wish to remove.
4. After selecting the supplier(s) you wish to remove if any preferred supplier lines were highlighted you will be prompted to retain them in the order.

7.7 Adding Items To An Order

To modify an existing order:

1. Navigate from the LOTS Start Menu → Orders.
2. The Orders screen will be displayed.
3. Select the order you wish to modify by highlighting it.
4. Select the ‘Open’ menu button to display the order. Alternatively, you can double click on the order with the mouse to open it.
5. The items on the order will be displayed (as shown in Figure 288). To add items to the order press the [Inset] key.
6. The stock search window will be displayed (see figure 289).
7. Search for the item you wish to order.
8. A list of items matching what you have keyed in will be displayed (as shown in Figure 290).

The screenshot shows a software interface titled 'Edit Order 16937'. The main area displays a grid of items with the following columns: PO#, Description, Qty, Units, List Cost, Real Cost, N.I.S., GST, Retail, Subtotal, and SOH Preferred Supplier. The grid contains approximately 24 rows of data. At the bottom of the window, there is a toolbar with buttons for 'Transmit Order', 'Fax Order', 'Print Supplier Copy', 'Print Internal Copy', 'Remove Preferred Suppliers', 'OK', and 'Cancel'.

Figure 288

The screenshot shows a 'Stock Search' dialog box. It has three input fields: 'Name / PLU / Barcode', 'Supplier PartCode', and 'UPI'. Below the fields are two buttons: 'OK' and 'Exit'.

Figure 289

The screenshot shows a 'Select an Item from the list below' dialog box. It displays a table of items with the following columns: PLU, Name, Pack, Manu., List Cost, Real Cost, Retail, and SOH. The table has 10 rows, each with a numerical index (1-10) on the left. Row 1 is highlighted with a blue background. At the bottom of the dialog, there is a message: 'To select, press 1-9 or double click. For next group press 0 or PgDn.' and two buttons: 'OK' and 'Cancel'.

Figure 290

9. Highlight the product that you would like and select the ‘OK’ button, alternatively you could also press the [enter] key to select the product.

10. Once you have selected your product, the 'Edit Item' screen will display (as shown in Figure 291).
 11. Key in the quantity you wish to order and then select the 'OK' button.
- Note:** The 'Sales History' displayed is for the last 12 months only.
12. You will return to the 'Edit Order' screen.
 13. Once your order is completed select the 'OK' button. This will save the order and return back to the Orders Main Menu.

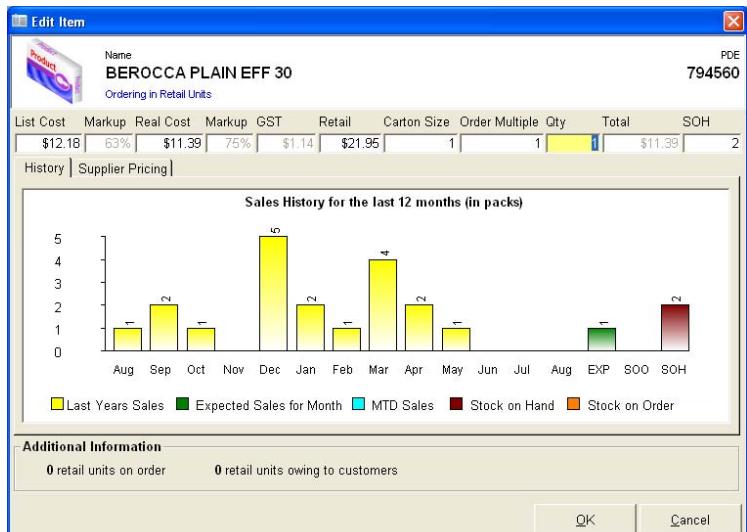


Figure 291

7.8 Adding Unknown Items To An Order

An unknown item is an item that can be ordered from a supplier that doesn't have a stock card. Use this feature when the supplier has provided you with a product code that you do not yet have a stock card for (e.g. – by-ins). It is recommended that you create a stock card for this item before the invoice is received so the invoice can match to the stock card.

To add an unknown product to your order:

- From your order screen, select the [shift] + [insert] key. This will display the 'Add Unknown Items To Order' window (as shown in Figure 292).

Note: You can also add an unknown item by selecting the 'Edit' drop-down menu → Add Unknown Item.

- Key in the PDE number, quantity and description of the item you wish to add to your order.
- Select the 'OK' button to add the product to the order.

- The 'Edit Order' screen will display again. The unknown item that has been added will be displayed in red (as shown in Figure 293).

- If you have entered a description name for your unknown item then this will be displayed. Otherwise, if you haven't then the product will be displayed as 'Unknown Item'.

- Once you have finished, select the 'OK' button to save the order and return back to the Orders Main Menu.

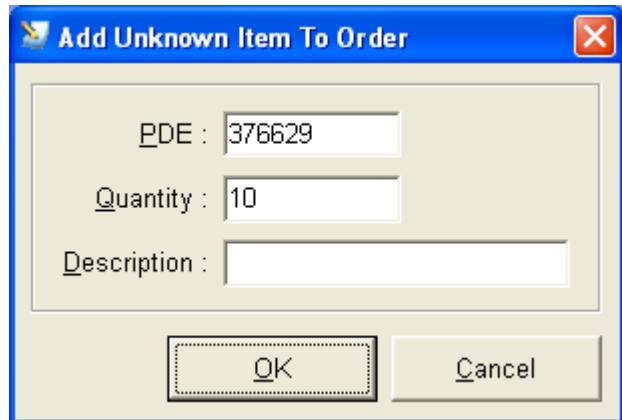


Figure 292

Edit Order 32622									
PDE	Stock Name	Qty	Pack	List Cost	Real Cost	Retail	Subtotal	SOH	PrefSupp
376629	Unknown Item	10	1	\$0.00	\$0.00	\$0.00	\$0.00	0	
BCLIP	BIOCEUTICALS LIPOTONE	3	1	\$14.12	\$14.12	\$22.95	\$42.36	13	BIOCEUTICALS
B.METH.	BIOCEUTICALS METHYL-MAX	2	1	\$21.42	\$21.42	\$37.50	\$42.84	3	BIOCEUTICALS
B.SOMNI	BIOCEUTICALS SONNICARE S	5	1	\$15.50	\$15.50	\$25.95	\$77.50	5	BIOCEUTICALS
B.UCEPA	BIOCEUTICALS ULT CLEAN EF	10	1	\$27.70	\$27.70	\$44.95	\$277.00	15	BIOCEUTICALS
B.UCEPA	BIOCEUTICALS ULT CLEAN EF	10	1	\$47.00	\$47.00	\$75.95	\$470.00	13	BIOCEUTICALS
BCULTR/	BIOCEUTICALS ULTRA MUSCI	5	1	\$20.09	\$20.09	\$33.15	\$100.45	5	BIOCEUTICALS

BIOCEUTICALS Totals 35 \$1,010.15 \$1,010.15 \$1,648.35 Unknown Items

Transmit Order Print Supplier Copy Print Internal Copy Remove Preferred Suppliers OK Cancel

Figure 293

7.9 Deleting A Product From An Order

To delete a product from an order:

1. From your order screen, select the product that you would like to delete by highlighting it
2. Select the <delete> key on the keyboard. Alternately if editing the item, change the order quantity to zero.
3. The 'Removing Item From Order' screen will be displayed (as shown in Figure 294). Explanations of each of these reasons are listed below.
 - **The item isn't required at this time:** This will remove the item from the order just for today. This item may come up for reorder the next time you generated an order.
 - **Wrong Supplier. Should be:** You can select an alternative supplier in the drop down menu for this product. Once selecting the new supplier, this product will be removed from the current order you are editing. Check the changes that happen to the stock card when selecting this option. It will remove the orders supplier from the stock card and add the correct supplier.
 - **This item has been Discontinued. Never order again:** If you select this option the item will be removed from the current order you are editing and the 'Re-order' option in the stock card will become unticked. As this option applies the item will never be automatically ordered via LOTS, however you will be able to manually add the item into any order. This is also the case for discontinued which you can't add so strictly its not the reason.
 - **The 'Stock On Hand' is incorrect it should be:** You can fix up the actual stock on hand in this field, and removing this line from the order.
 - **Do not order until:** You can tell LOTS not to order a particular stock line until a designated date. LOTS will default with the 1st of the next month; however you can override this date with whichever date you specify.
4. Select a reason for deleting the product from the order by clicking on its corresponding radio option.

Note: It is worthwhile answering these questions accurately as it enables changes to be made to your stock cards which will be reflected in subsequent orders.

5. Once your reason is chosen, select the 'OK' button.
6. You will be returned to the 'Edit Order' screen to continue modifying your order.



Figure 294

7.10 Printing A Copy Of An Order

There are three different versions of your order that you are able to print. These are Supplier Copy, Internal Copy and a Fax Order.

- **Supplier Copy:** A Supplier Copy of the order can be used to be given directly to your sales representative or faxed to the supplier.
- **Internal Copy:** This format shows what is on the order screen. For example it shows PDE, Description of Product, quantity, pack, list cost, real cost, POS retail, subtotal, SOH and preferred supplier.
- **Fax Order:** This function allows you to fax through a copy of your order to your supplier (if you have installed 3rd party faxing software). This order will appear in the same format as a supplier copy.

7.10.1 Print A Supplier Copy

1. From the 'Edit Order' screen (as shown in Figure 295) select the 'Print Supplier Copy' button on the bottom of the screen.
2. The copy of your order will print out to your reports printer.
3. After you have selected the 'Print Supplier Copy' button, the system will prompt you to mark the order as being 'Ordered'.
4. Select 'Yes' to proceed.

The screenshot shows the 'Edit Order 28' window. At the top, there are tabs for 'Edit' and 'Process'. Below the tabs is a grid of items with columns: PDE, Stock Name, Qty, Pack, List Cost, Real Cost, Retail, Subtotal, SOH, and PrefSupp. The grid contains several rows of pharmaceutical products. At the bottom of the window, there is a toolbar with buttons for 'API', 'Totals' (showing 71 items, \$323.06, \$320.14, \$484.00), and 'Unknown Items'. The 'Print Supplier Copy' button is highlighted. Other buttons in the toolbar include 'Transmit Order', 'Fax Order', 'Print Internal Copy', 'Remove Preferred Suppliers', 'OK', and 'Cancel'.

Figure 295

7.10.2 Print An Internal Copy

1. From your 'Edit Order' screen (as shown in Figure 296) select the 'Print Internal Copy' button on the bottom of the screen.
 2. The copy of your order will print out to your reports printer.
- Note:** As this printed order is an internal copy only, LOTS will not prompt you to change the status of the order.
3. If you have finished editing your order, select the 'OK' button to go back to your orders main screen.

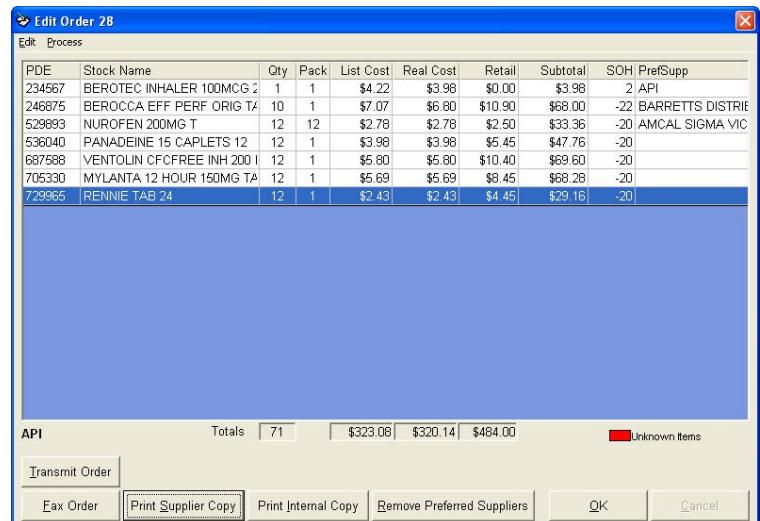


Figure 296

7.10.3 Print A Fax Order

1. From your 'Edit Order' screen (as shown in Figure 297) select the 'Fax Order' button on the bottom of the screen.
2. The copy of your order will be sent to you nominated fax software (as shown in Figure 298).

Note: If you don't have fax software installed, select the 'Print Supplier Copy' button. This will print a physical copy of the order allowing you to send via your fax machine.

3. After you have selected the 'Fax Order' button (or faxed the order manually), the system will prompt you to mark the order as being ordered.
4. Select 'Yes' to proceed.

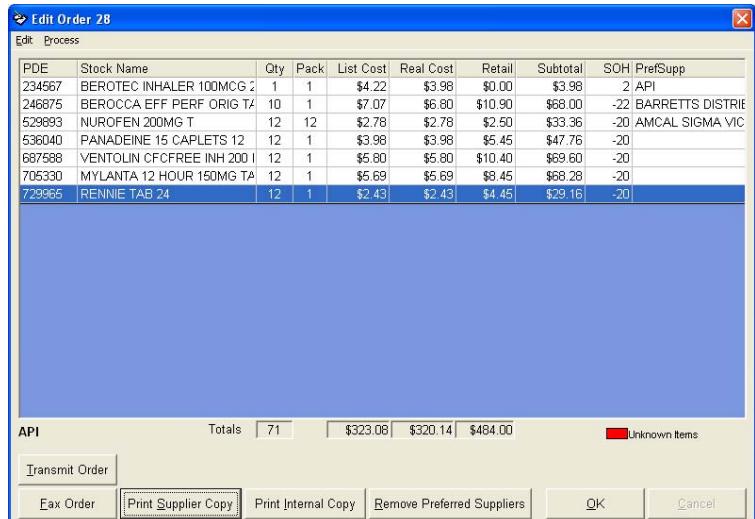


Figure 297

Items on Order - Supplier Copy -						Page 1	
SUREFIRE - PHARMASOL LEVEL 1 1788 TOORAK ROAD HAWTHORN EAST VIC 3128 Ph 9804 6688 Fax 9804 6689 Ordered By: Pharmasol Order Number: 28						Order from: API	
						P1 Fax	
PDE	Barcode	Description	QTY	Pack			
246875	9310160812339	BEROCCA EFF PERF ORIGTAB 15	10	1			
234667		BEROTEC INHALER 100MCG 200 DOSE	1	1			
705330	9310069006924	MYLANTA 12 HOUR 150 MG TAB 14	12	1			
529893	0000093711562	NUROFEN 200MG T	12	12			
536040	9300673837400	PANADEINE 15 CAPLETS 12	12	1			
729965	9310041560663	RENNIE TAB 24	12	1			
687588	9300670217335	VENTOLIN CFCFREEINH 200 DOSE	12	1			
Total			71				

Figure 298

7.11 Transmitting An Order

Once a new order has been generated, and any additional items have been added, the order needs to be printed and given to the supplier or transmitted electronically.

An order can only be transmitted from a computer that has been set up for electronic ordering.

1. From the 'Orders' screen select the order you wish to transmit by highlighting it.

2. Select the 'Transmit' button.
It will start to electronically transmit the order to the selected wholesaler.

Note: You can also open the order and select the 'Transmit Order' button.

3. Once the order has been sent, you will return to the 'Order' screen and the 'Status' of the order would have changed from 'New' to 'Ordered' (as shown in Figure 299).

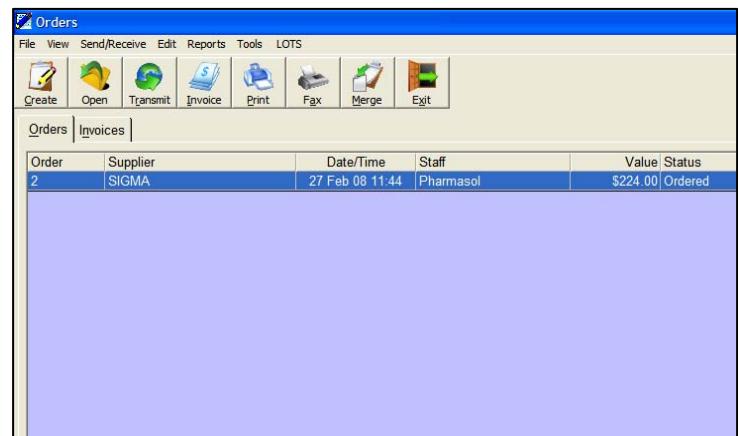


Figure 299

Note: for wholesalers that are not set up to transmit electronically you need to change the status manually. To do this you need to select the order (so that it is highlighted) and choose 'Edit', 'Mark as Ordered' or right click and choose 'Mark as Ordered'.

7.12 Collecting an Electronic Invoice

1. To collect an electronic Invoice, from the 'Orders' screen simply select the order you wish to collect by highlighting it.
2. Select the 'Invoice' button. LOTS may display items that cannot be supplied from that wholesaler (out of stocks); this list can be sent to a 'Re Order' file if requested by the user.
3. Once the invoice has been collected, the 'status' of the order would have changed from 'Ordered' to 'Acknowledged' (as shown in Figure 300).

Orders					
File View Send/Receive Edit Reports Tools LOTS					
Create	Open	Transmit	Invoice	Print	Fax
Orders Invoices					
Order	Supplier	Date/Time	Staff	Value	Status
2	SIGMA	27 Feb 08 11:44	Pharmasol	\$224.00	Acknowledged

Figure 300

Note: for wholesalers that are not set up to transmit electronically you need to change the status manually. To do this you need to select the order (so that it is highlighted) and choose 'Edit', 'Mark as Acknowledged' or right click and choose 'Mark as Acknowledged'.

Because this is being processed manually you will be prompted to enter the Invoice number before returning to the 'Order' screen (as shown in Figure 301).

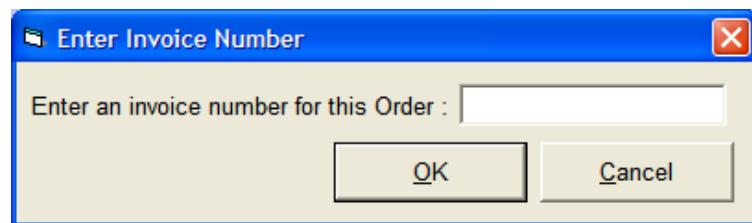


Figure 301

7.13 Editing an Electronic Invoice

1. To edit an electronic Invoice, from the 'Orders' screen navigate to the 'Invoices' tab, highlight the invoice you wish to edit and select Open.
- Note:** You can also double click on the invoice to open it.
2. Once the invoice is displayed (see Figure 302), change the fields (if necessary) so that they accurately reflect what was received via the order.
 3. The following fields can be edited if required:
 - Inv Qty
 - List cost
 - Markup
 - Real Cost
 - GST
 - Sub Total
 - Retail

The screenshot shows the 'Invoice Analysis' window. At the top, it displays 'Supplier: Sigma' and 'Invoice Number: 321654'. The main area is a grid table with columns: PDE, Description, Ord Qty, Inv Qty, List Cost, Markup, Real Cost, N.I.S, Markup, GST, Sub Total, Retail, Order No, and Tote Number. Below the grid is a large blue rectangular area. At the bottom of the window is a toolbar with various buttons and status indicators.

PDE	Description	Ord Qty	Inv Qty	List Cost	Markup	Real Cost	N.I.S	Markup	GST	Sub Total	Retail	Order No	Tote Number
001594	AMOXIL 250MG C 20	6	6	\$2.54	58%	\$4.15	\$0.00	322%	\$2.49	\$27.39	\$17.50	1784	
877751	BEROCCA ORIG TAB EFF 15	21	21	\$7.35	63%	\$6.42	\$0.00	86%	\$13.48	\$148.30	\$13.15	1784	
631671	BEROCCA PERFORM REGULAR TAB 30	1	5	\$11.22	-19%	\$8.19	\$0.00	11%	\$4.10	\$45.05	\$10.00	1784	
631671	BEROCCA PERFORM REGULAR TAB 30	0	5	\$11.22	-19%	\$8.19	\$0.00	11%	\$4.10	\$45.05	\$10.00	1784	
227363	CLOFEN 10MG T 100	1	1	\$22.31	20%	\$32.54	\$0.00	-18%	\$3.25	\$35.79	\$26.77	1784	
050864	CORDARONE X 100 100MG T 30	1	1	\$7.48	20%	\$10.90	\$0.00	-18%	\$1.09	\$11.99	\$8.98	1784	
389122	DOTHEP 25MG C 50	1	1	\$2.21	20%	\$2.53	\$0.00	5%	\$0.25	\$2.78	\$2.65	1784	
154401	EPILIM 500MG EC T 100	2	2	\$23.81	20%	\$28.30	\$0.00	1%	\$5.66	\$62.26	\$28.57	1784	
511618	LIPEX 80MG T 30	2	2	\$50.86	600%	\$97.01	\$0.00	267%	\$19.40	\$213.42	\$356.02	1784	
233940	MADOPAR 1.25 100MG-25MG T 100	1	1	\$28.26	20%	\$30.92	\$0.00	10%	\$3.09	\$34.01	\$33.91	1784	
024539	NOTEN 50MG BLS T 30	1	1	\$3.35	20%	\$4.48	\$0.00	-10%	\$0.45	\$4.93	\$4.02	1784	
628594	TRAVATAN EYE DROPS 0.004% 2.5ML 1	1	1	\$31.22	20%	\$25.95	\$0.00	44%	\$2.60	\$28.55	\$37.46	1784	
547174	VOLTAREN RAPID 25MG T 20 1	1	1	\$7.95	20%	\$6.96	\$0.00	37%	\$0.70	\$7.66	\$9.54	1784	
632414	XALACOM EYE DROPS 2.5ML 1	2	2	\$35.90	20%	\$35.40	\$0.00	22%	\$7.08	\$77.88	\$43.08	1784	
736686	ZABEL 250MG T 42	1	1	\$87.84	33%	\$0.00	\$0.00	0%	\$0.00	\$0.00	\$116.85	1784	

Figure 302

7.14 Order Delivering An Order

Order delivery updates the items' stock on hand, List, Average and Real Cost prices within the stock card.

- From the 'Orders' screen, Click on the 'Invoice' tab. All orders that have been 'Acknowledged' in LOTS will have a corresponding invoice in the Invoice tab.
- Select the Invoice by highlighting it and select the 'Open' button (as shown in Figure 303).

Note: You can also display the invoice by double clicking on it.

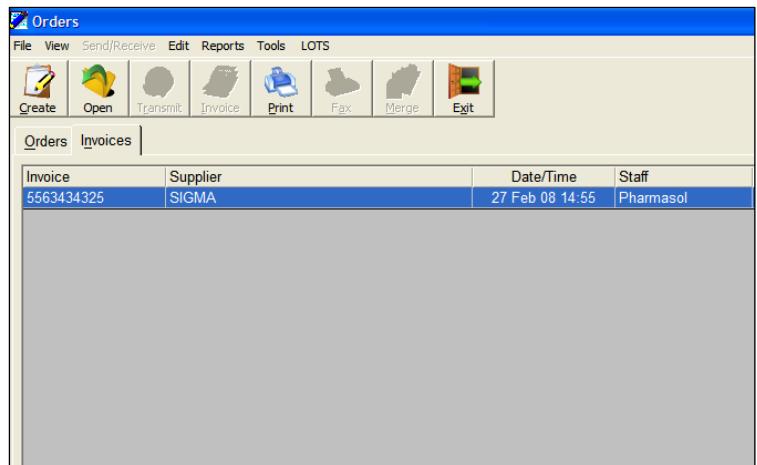


Figure 303

- The selected invoice will then display. Make modifications to the invoice in LOTS:
 - If any stock is under, over or no supply indicates this is the 'Invoice Quantity' column.
 - Check list and real costs (remember costs in invoice are ex-GST).
 - Check retail prices, making changes if necessary.

Note: If your LOTS system is connected to a Head Office you will also have a N.I.S. (Nett into Store) column indicating the price entered via Deal Sheet. Your cost price will be coloured green (matching), red (N.I.S. exceeds real cost) or blue (N.I.S. is less than real cost). You need to compare these values to the real cost and take whatever action as directed by your Head Office with regards to exceptions.



Figure 304

- Order deliver your order line-by-line and when complete select 'Order Deliver' (as shown in Figure 304). This will update the products SOH and Cost in stock cards.
- Before the Invoice is completed you will be prompted to key in the Expense Details (as shown in Figure 305). It is important that the total 'Cost' (ex-GST) and 'Amount of GST paid' is correct for reporting purposes. It is also important that the 'Date of Invoice' is entered as the date on the paper invoice supplied by the wholesaler, NOT the day of processing.

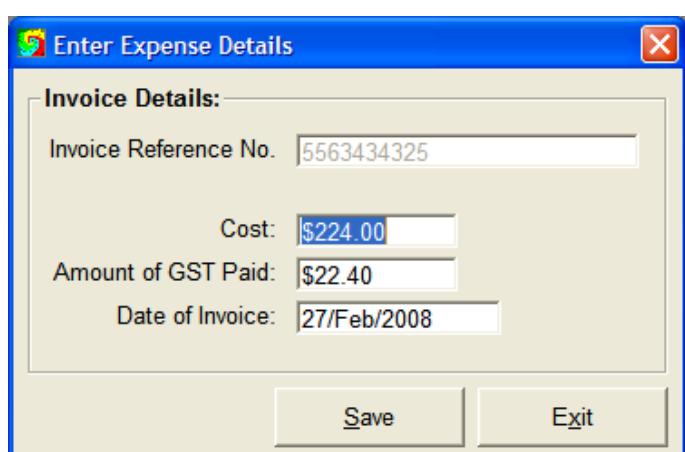


Figure 305

Note: Whether or not you wish to record these details is optional. If you have Deliver Orders to Creditors File (Orders window → Tools drop-down menu → Options) ticked then these details will allow you to report on GST on purchases via the Business Activity Report (see section: **10.13 – Business Activity Report**).

6. Once you have entered in the cost of the expenses, select the 'Save' button.
7. Select 'OK' to finalise. This will update the creditors file and subsequently delete the order within the current invoices tab.

Note: Items that require goods labels will automatically print after 'Order Delivery' according to the goods labels setting in stock cards and any shelf labels reflecting altered retail prices will now be in the shelf label queue.

8. Below is a slightly more detailed description of some of the colours shown above in Figure 304.

Colour	Description
Green text, White background	Item that are 'matched' are indicated by green text. This informs you that the invoice item matches the order item. If an invoice isn't matched it will be coloured differently.
Green text, Yellow background	Items highlighted in yellow have had a price change. The price change may be up to the cost, list, real or retail prices. The prices that have changed on that line are indicated by an asterix (*). Place (hover) your mouse over a changed price to see what the old price was. The new prices in this invoice will be updated to your stock card at the point of order delivery; make any required changes to the cost or retail price prior to order delivery.
Red text	Items that are coloured red indicate 'No Supply'. This is usually because an invalid ordering code was user, the item is out of stock or has been discontinues from the supplier. Upon order delivering of this invoice you will be prompted to add these items to the re-order files if desired.
Burgundy text	Items that are coloured burgundy indicate 'Additional Supply'. These are items that have been added to the order invoice that were not part of your original order. These may be replacement products, from a turnover order or backorder release.
Royal Blue text	'Under Supply' items are coloured royal blue, this indicates that the order quantity is greater than the invoice quantity.
Dark Blue text	Dark blue text indicates 'Over Supply', this means that the invoices quantity exceeds the ordered quantity.

7.15 View Menu Options

The below options can be selected from the 'View' drop-down menu.

Order Status	Definition
Current	This will display all current orders (all Orders that have a status other than 'Delivered')
Completed	This will display all orders that have been delivered.
Search	<p>This option allows you to search for orders and invoices current or completed. The search window (Figure 306) allows you to search using a number of filters, these include:</p> <ul style="list-style-type: none"> • Include Completed Orders • Include Current Orders • Date Range • Supplier • Product • Staff ID • Greater than \$ • Order No. • Invoice No.

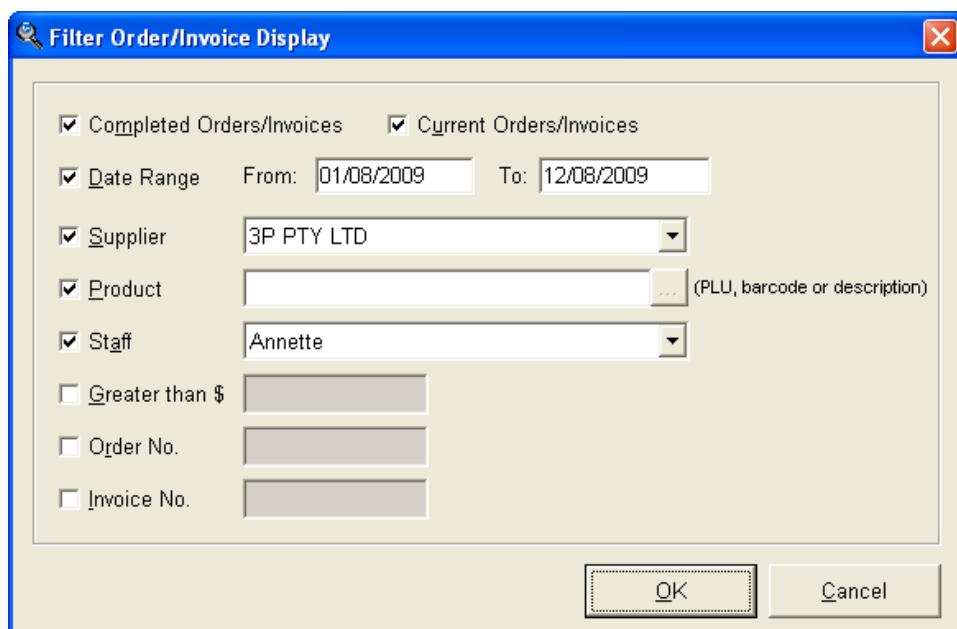


Figure 306

7.16 Edit Menu Options

The below options can be selected from the 'Edit' drop-down menu.

Option	Definition
Delete Order	This will allow you to delete any order that has a status of 'New'.
Merge Order	This will allow you to merge any two orders that have any status other than 'Ordered'. If you merge together two orders with different suppliers the merged order will not be set with a supplier.
Mark as New	This option allows you to mark any order with a status of 'Ordered' (or 'Back-Ordered') to 'New'. If you want to delete an order with a status of 'Ordered' you will need to 'Make as New' before you can delete it.
Mark as Ordered	This option allows you to mark any order with any status of 'New' or 'Acknowledged' to 'Ordered'.
Mark as Acknowledged	This will allow you to mark any orders that have any status other than 'Reorder' to 'Acknowledged'.
Change Supplier for Order	See section: 7.16.1 – Change Supplier For Order.
Add New Supplier	See section: 7.16.2 – Add New Supplier.
Edit Supplier Details	This option allows you edit the supplier details including name, address details and price and ordering settings.
Edit Invoice Number	This option allow you to change the invoice number when in the ' <u>Invoice</u> ' tab.
Delete invoice	This option will allow you to delete an invoice when in the ' <u>Invoice</u> ' tab.

7.16.1 Change Supplier For Order

The option will allow you to change the supplier that is set for any particular order. If the new supplier you set does not have a valid PDE for this product the following window will appear (see Figure 307). This window requires you to choose an option so that the item can be ordered correctly from the new supplier.

You can go through each item that does not have a valid PDE one-by-one and choose a way to proceed, but, if you are going to use one proceed for all invalid PDE simply select the option and tick the 'Apply selection to all items with an Invalid PDE'.

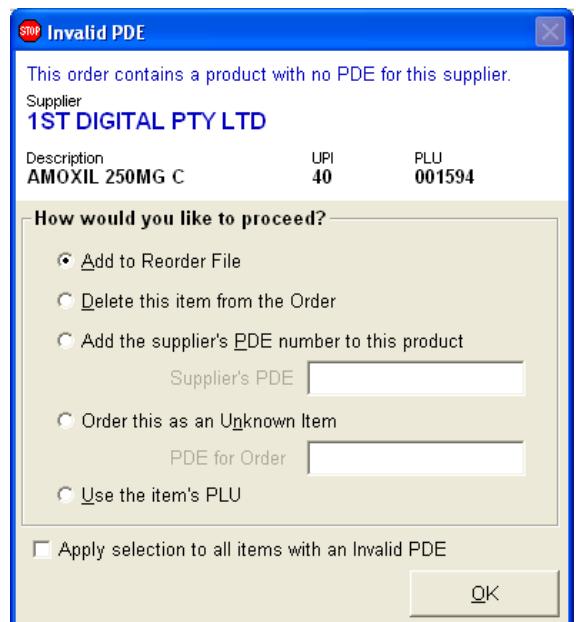


Figure 307

7.16.2 Add New Supplier

The option will allow you to add a new supplier to order with. Once you add a Supplier Name (add other details if applicable) you must select 'Save' before you can set the 'Advanced...' options.

The Advanced Settings have two tabs. The first tab is 'General Options' (Figure 308), this tab allows you to set three different options:

- **Cost Price Include GST** – When collecting an electronic invoice from your wholesaler the 10% GST is removed so that the correct prices are added to the stock card for list, real and retail – if ticked.
- **Order using barcodes** – Tick this option if you would rather send the barcode of your product to supplier than Partcodes.

The second tab is 'Price Update Options' (Figure 309), this tab will allow you to set two different options:

- **Update list cost** – If you want your list cost to be updated when receiving an electronic invoice tick this option. You must then choose to either change the retail price to match the markup or to recalculate the markup to match the retail price.
- **Update Real cost** – Tick this option if you want the Real cost to be updated when receiving an electronic invoice.

The 'Settings' tab allows you to set your order details based on the connect type you select. To set these options for your supplier please contact Corum Support.

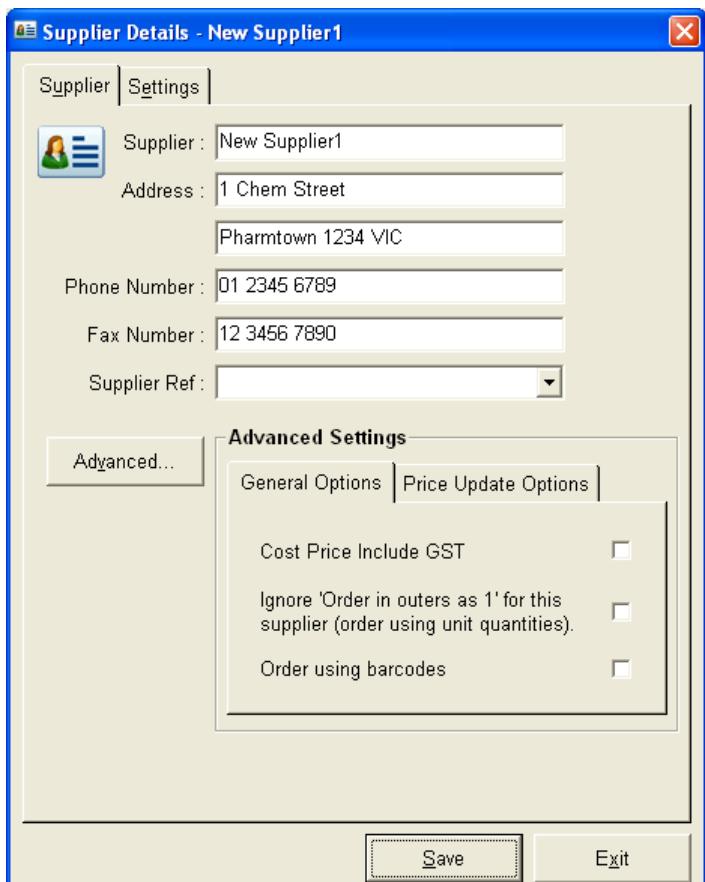


Figure 308

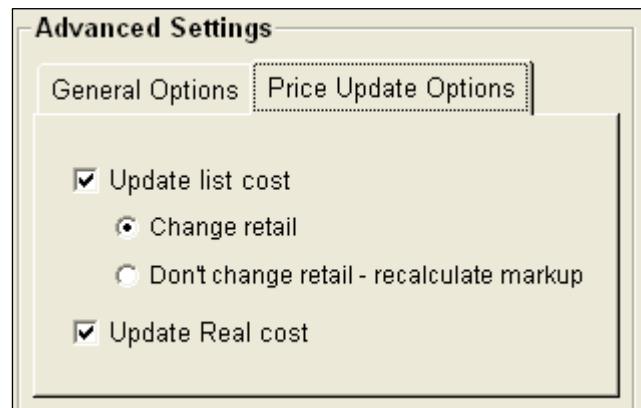


Figure 309

7.17 Reports Menu Options

LOTS Orders has one major report called 'Order/Invoice Item Detail Report'. This window (see Figure 310) provides many filters such as:

- Search For (Orders or Invoices)
- Status (Current or completed)
- Date Range

You can also choose how you wish to sort by: Order/Invoice Date or alphabetically by Item.

Once you have made your selections, select 'OK' to generate the report (Figure 311).

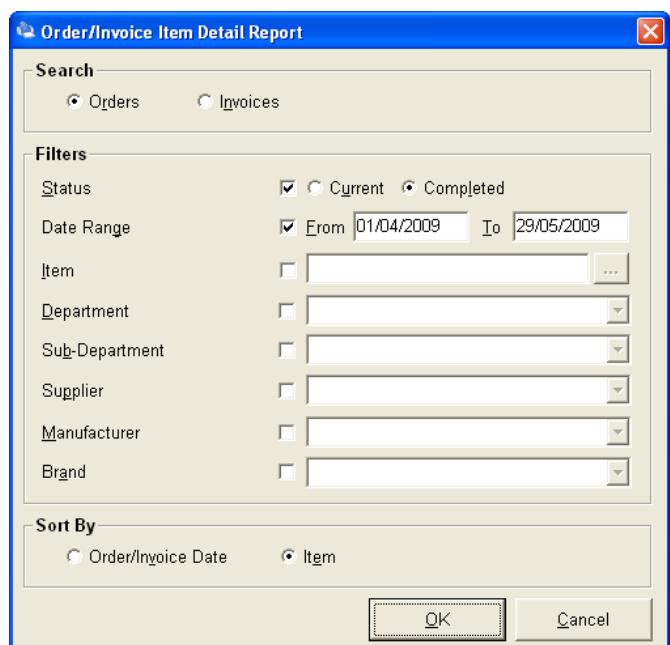


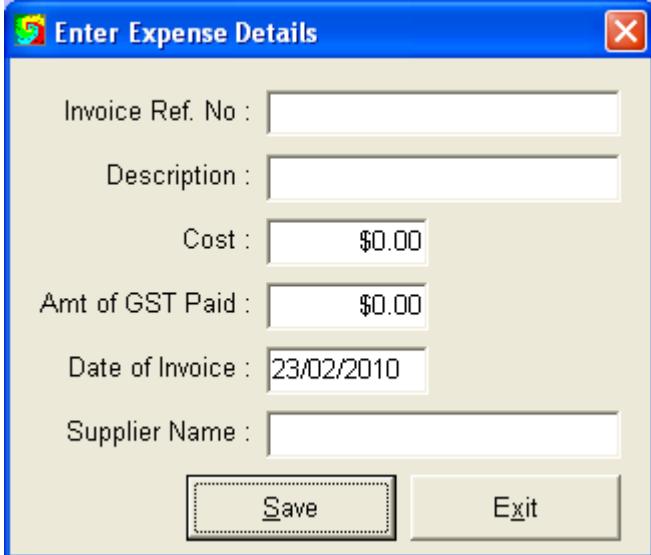
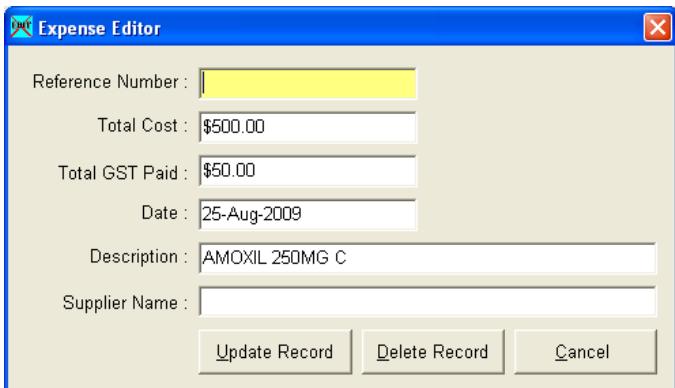
Figure 310

Order Item Detail Report								
Order Date	Order No	PLU	Item	Qty	ListCost	RealCost	Retail	Supplier
25/05/07	15263	060863	AGAROL LAX VA 200ML	3	\$5.57	\$3.99	\$7.95	API
26/05/07	15266	374371	AIM TPASTE 90G ORIGINAL	4	\$1.08	\$0.96	\$1.95	API
09/05/07	15090	524777	AIROMIR AUTOHALER 200 DOSE	4	\$13.99	\$13.58	\$18.45	API
09/05/07	15087	524777	AIROMIR AUTOHALER 200 DOSE	1	\$13.99	\$13.58	\$18.45	API
21/04/07	14929	505875	AIROMIR INHALER 200 DOSE	2	\$3.83	\$4.71	\$6.00	API
17/04/07	14881	193062	AKAMIN 50MG T	20	\$7.89	\$6.63	\$13.95	CUSTOM SUPPLIER 66
30/04/07	14988	990082	AKIN ANTIOXIDANT DAY CRM 50ML	1	\$20.99	\$20.43	\$36.95	CUSTOM SUPPLIER 111
30/04/07	14988	987486	AKIN BODYWASH SWOOD 225ML	2	\$7.10	\$6.79	\$12.50	CUSTOM SUPPLIER 111
30/04/07	14988	988663	AKIN BODYWASH UNSCENTED 225ML	2	\$7.10	\$6.79	\$12.50	CUSTOM SUPPLIER 111
30/04/07	14988	990099	AKIN FACIAL SCRUB 75ML	3	\$15.06	\$14.20	\$26.50	CUSTOM SUPPLIER 111
30/04/07	14988	990102	AKIN HAND & NAIL INT TREATMENT 75ML	1	\$9.06	\$8.49	\$15.95	CUSTOM SUPPLIER 111
30/04/07	14988	990103	AKIN HND&NAIL LAV CUT CRM 75ML	1	\$9.06	\$8.49	\$15.95	CUSTOM SUPPLIER 111
30/04/07	14988	990096	AKIN PURE EMERGENCY GEL 75ML	1	\$12.47	\$12.47	\$21.95	CUSTOM SUPPLIER 111
21/05/07	15204	907131	ALBA EYE GEL GRN TEA 30ML	2	\$12.47	\$12.47	\$21.95	CUSTOM SUPPLIER 88
21/05/07	15204	907140	ALBA BODY SCRUB & CRM PK	6	\$17.02	\$10.89	\$29.95	CUSTOM SUPPLIER 88

Figure 311

7.18 Tools Menu Options

The below options can be selected from the 'Tools' drop-down menu.

Option	Definition
<u>Options</u> → Delivered Orders to Creditors File	This is an option which allows the user to add the total cost; amount of GST paid and the date of an invoice into a creditors file for reporting purposes. The creditors file can be located via Orders à Tools à Edit Creditors File
<u>Options</u> → Liquidity	This option allows you to set Liquidity. The liquidity setting influences how much buffer stock is used in the LOTS ordering algorithm. A low number (0 - 30) will have little or no buffer stock a high number (70 - 100) will have several weeks buffer stock.
Options → Rounding Threshold	This option allows the user to set a default Rounding Threshold value. A rounding threshold is the percentage of a carton or minimum order qty needed before it is added to the order. This is an advanced option which aids pharmacies to manage stock levels.
Options → Wholesaler billing date	This option allows you to enter the day of the month that your main wholesaler bills you to.
Add Transaction to Creditors File	This allows the user to add any invoice details into the creditors file that perhaps has been missed or received outside of LOTS. 
Edit Creditors File	This allows the user to view, edit or delete any entry from the creditors list. 

8 Debtors

The Debtors module allows you to control all of your customer accounts from one central location.

If you are part of a Head Office that manages debtors centrally, the LOTS Debtors module will look much different and contain limited functionality, refer to your RPM User Manual for debtor instructions.

8.1 Creating A Customer In The LOTS Database

A customer may be created within LOTS through the Debtors Module. Some or all of these customers may be made into a debtor/account customer.

To add customers to your LOTS

database:

1. Navigate from the LOTS Start Menu → Debtors → Tools drop-down menu → Edit Customer.
2. A Patient Search screen will appear, select the 'New Person' button (as shown in Figure 312).
3. The 'Patient Details' screen will be displayed and you will be in the 'Personal' tab (as shown in Figure 313).
4. Ensure that you key in the following fields when creating a customer within the database:
 - Title
 - First name
 - Family name
 - Address
 - Suburb and Postcode
5. The remaining fields (e.g. Date of Birth, Phone Number and Compensation details etc) are optional for extra information regarding the customer.
6. The 'Use Mailing Address' option allows the debtor statement to be sent to a different address from what is recorded in the customer's address field. Activate this by placing a tick into the 'Use Mailing Address' field and type in the other address in the allocated space.
7. Once the details are completed select the 'OK' button to save and return to the 'Debtors' screen.

Note: If this new person is to be given an account you can setup the account at the same time (for more information refer to section **8.2 – Turning A Customer Into A Debtor/Account Holder**).

The screenshot shows a Windows-style dialog box titled "Patient Search" with a blue header bar. Below the title is a sub-header "Enter Search Information:" with a small icon of a patient. The form contains three text input fields: "Name / Barcode" (highlighted in yellow), "Address", and "Institution". At the bottom are three buttons: "New Person" (highlighted in yellow), "OK", and "Cancel".

Figure 312

The screenshot shows the "Patient Details" dialog box with a blue header bar. The "Personal" tab is selected. The form includes fields for Title (highlighted in yellow), First Name (JOHN), Family Name (CITIZEN), Address (123 PHARMACY STREET), Suburb (PHARMTOWN), Postcode (3000), Phone (D.O.B.), Email, and Institution. To the right, there are fields for ABN, Medicare (28962288911), Expiry Date (30/11/2011), Membership, Compensation No., Room/Ward ID, and a "Mailing Address" section with fields for Address, Suburb, and Postcode. Below these are sections for Medicare Name (First Name, Surname) and Family Members (First Name, LastName, SNet Count). At the bottom are buttons for "New Search", "OK", and "Cancel".

Figure 313

8.2 Turning A Customer Into A Debtor/Account Holder

1. Navigate from the LOTS Start Menu → Debtors → Tools drop-down menu → Edit Customer.
2. A Patient Search screen will appear (figure 314), Key in the name of the customer you want to turn into a debtor/account holder. Click 'OK' to continue.
3. Select the appropriate Person (if needed) from the generated list and Click 'OK' to continue.
4. When the customer details are displayed, click onto the 'Account' Tab, and in the 'Charge to' section and select the 'Own Account' option (as shown in Figure 315).
5. The 'Items Allowed on Account' section allows you to specify whether the customer is allowed to charge 'Shop Items' and/or 'Prescriptions' to their account. Place a tick in the check box corresponding to the option(s) you want to allow.
6. You can specify any discounts this account holder will receive on shop items and NHS/Private prescriptions by keying in the percentage amounts. This discount will automatically be applied at the time of charging to the account.
7. Under the 'Account Details' section you are able to:
 - Specify an 'Account Credit Limit' by entering a credit limit value within this field (\$0.00 means no credit limit).
 - Place the account on stop credit by selecting the 'Stop Credit' tick box. Once ticked you will not be able to charge sales or scripts to the account.
 - Indicate whether you wish to charge scripts automatically to this account by selecting the 'Charge Scripts Automatically' tick box (this option is only applicable to LOTS Complete users).
 - Insert a message that will appear at the Point of Sale when selling items to this particular account customer. The message is a prompt for the sales staff only; the customer doesn't see the message. This is optional.
 - Specify an account class by selecting it from the drop down menu in the 'Account Class' field drop-down menu. If you wish to create a new account class simply type it in to account class field and click 'OK'. LOTS will ask if you wish to create a new class because that account class doesn't exist. Select the 'Yes' button. Account classes are used to group debtors together for utility and reporting purposes
 - If the 'Include Compensation Details on Debtor Statements' option is ticked the debtors compensation number (received from TAC, Workcover etc) will be printed out in the header of their monthly statements. The 'Compensation Number' firstly needs to be stored in the debtors 'Personal' details tab.
8. Select the 'OK' button to save.

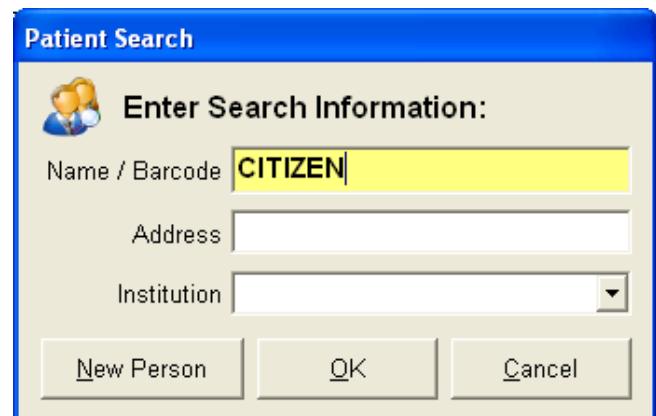


Figure 314

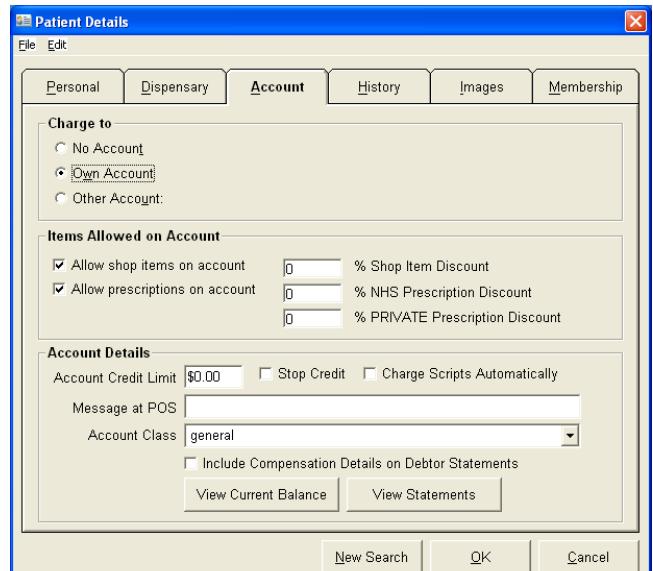


Figure 315

8.3 Linking Family Members

To link family members to the one account, each family member is initially required to be set up as a 'Customer' within the LOTS database.

1. Navigate from the LOTS Start Menu → Debtors → Tools drop-down menu → Edit Customer.
2. A Patient Search screen will appear, Key in the family members surname that you want linked to the principal account holders account. Click the 'OK' button to continue (as shown in Figure 316).
3. Select the appropriate Person from the generated list and Click 'OK' to continue.
4. The customers' details will display.
5. Click onto the 'Account' Tab and select the 'Other Account' option. Key in the name of the principal account holder (as shown in Figure 317) and press <Enter>. For example if you want to link Mrs Jane Citizen to Mr John Citizen, call up Jane Citizen and select Charge to 'Other Account' and type in John Citizen.
☞ **Note:** John Citizen must have been previously set up as a debtor.
6. Once you have selected the principal account holder it will then display the debtor options that were selected for the primary account holder.
7. Select the 'OK' button to save and return to the 'Debtors' screen.

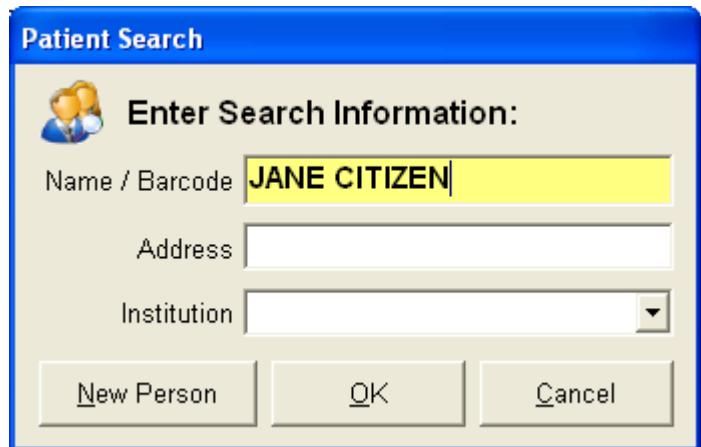


Figure 316

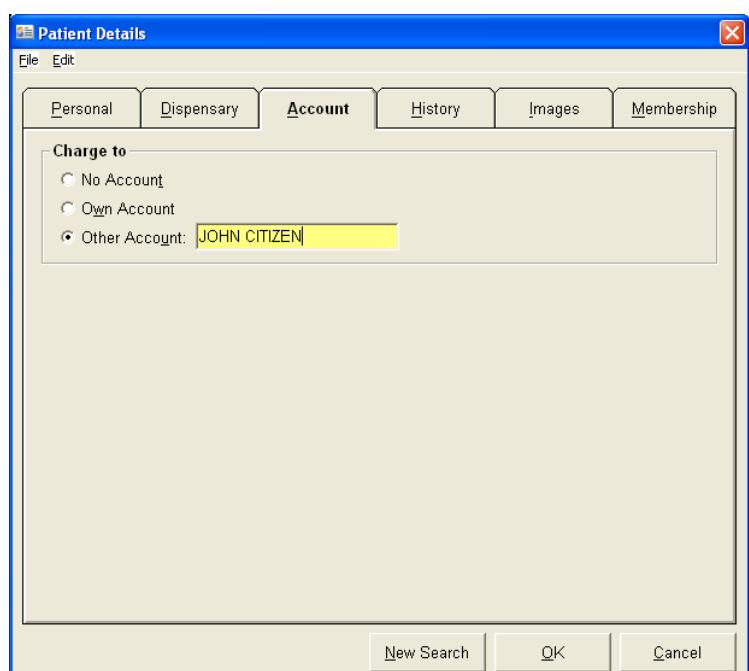


Figure 317



Handy Hint!

Whenever the Linked account holder wants to charge something to their account at the Point of Sale, the system still enables you to charge it to 'Their' account but it is actually charging to the Primary account holder's account. This prevents the Linked family members from getting individual monthly debtor statements as their transactions will be now associated to the one account and therefore one debtor statement will be sent for all.

8.4 Pay Account

1. Navigate from LOTS Debtors → Tools drop-down menu → Pay Account
2. This will display the 'Account Payment' window for the selected debtor (see Figure 318).
3. Enter in the payment amount and the number of receipts you wish to print and then select 'OK'.

Note: It is recommended that the majority of account payments are performed within the LOTS Sales module.

This option is typically used by LOTS Dispense only customers who don't have a sales system.

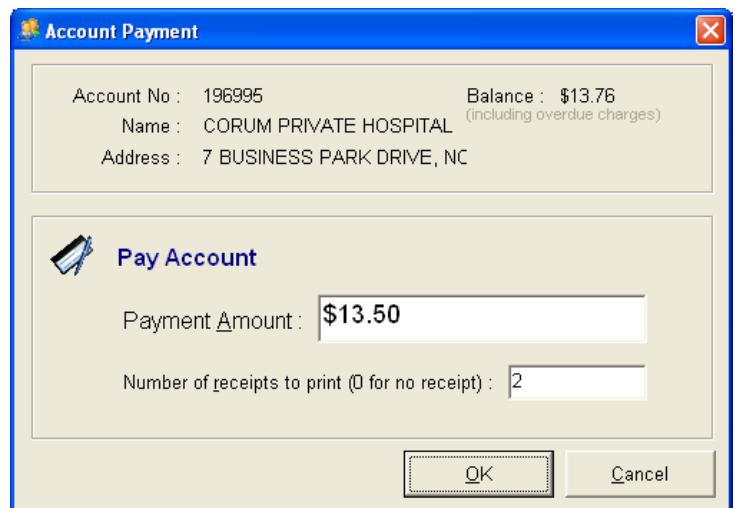


Figure 318

8.5 Journal Entries

'Journal Entry for a debtor' allows staff to Debit or Credit amounts off accounts, clear a debtor's total account balance back to zero or enter Messages that will appear on an account holder's statement.

1. Navigate from the LOTS Start Menu → select Debtors → Search drop-down menu → Search for Debtor.
2. A Search for Debtor screen will appear, Key in the debtors name (as shown in Figure 319).
3. Once you have located the debtor that you want to perform the journal entry for select Tools → Journal Entry for this Debtor.
4. The Journal Entry screen will appear including the details of the debtor chosen (as shown in Figure 320).
5. To apply a new 'Journal Entry', simply select one of the 'Action' options:
 - **Debit Amount** – This allows you to debit any desired amount onto the debtors account. Select the 'Debit Amount' option and Key the amount into the 'Amount \$' field (as shown in Figure 272). You can also add a message to describe the reason for the change.
 - **Credit Amount** – This allows you to credit any desired amount off the debtors account. Select the 'Credit Amount' option and Key the amount into the 'Amount \$' field. You can also add a message to describe the reason for the change.
 - **Zero Account** – This allows you to clear the debtors total account balance back to Zero. Select the 'Zero Account' option. You can also add a message to describe the reason for the change.
 - **Message Only** – This allows you to enter a message that will appear on the debtors account statements. Simply select 'Message Only' option and type the desired message into the 'Message to appear on statement' field.

6. To save either one of these changes simply Click the 'OK' button, then the 'Yes' button when prompted if you are sure you would like to apply this change.

Note: If you need to apply a Journal entry to all of the listed debtors, select Tools → Group Journal Entry.

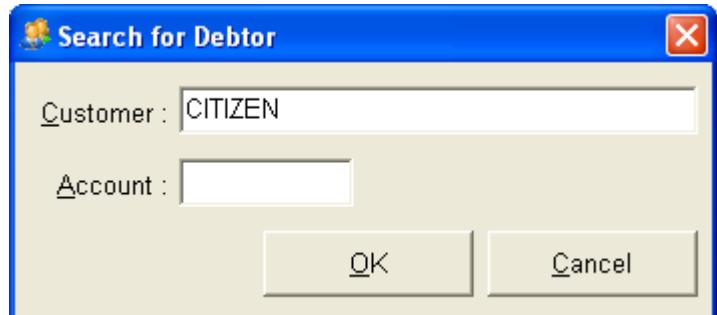


Figure 319

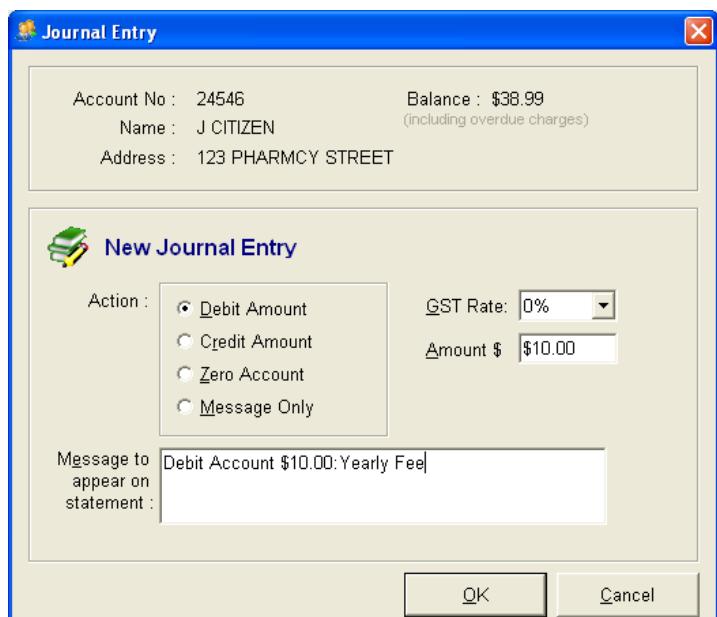


Figure 320

8.6 Options – Statements Tab

The **Statements** tab allows you to choose options that will be viewed on your statements. Simply place a tick in the tick box of the option that you wish to activate:

1. In Debtors navigate to the Tools drop-down menu → Options.
2. The Debtor Options screen will appear (as shown in Figure 321).

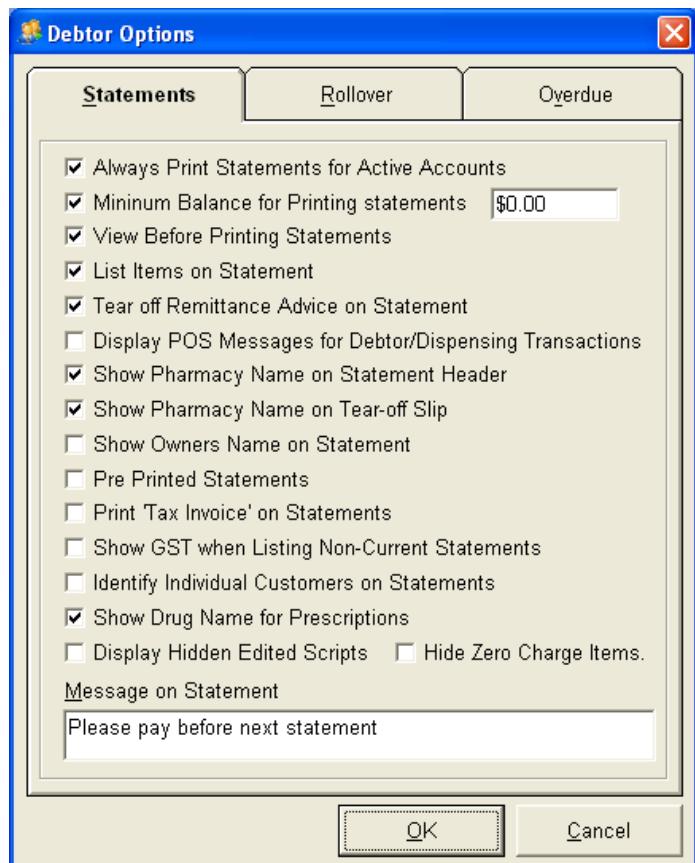


Figure 321

Option	Definition
Always Print Statements for Active Accounts	If this option is ticked when doing a rollover always prints statement for active accounts. Active Accounts are defined as any account that has either a payment made to it or had at least one item charged to it.
Minimum Balance for Printing Statements	If this option is ticked you will be set a minimum balance for printing statements. If a customer's account is below this balance then a statement will not be printed for them.
View Before Printing Statements	Tick this option if you wish to view each individual statement one-by-one before printing them.
List Items on Statement	If ticked this option will display the product descriptions on each statement (recommended).
Tear off Remittance Advice on Statement	If this option is ticked this will print a remittance slip at the end of the statement.
Display POS Messages for Debtor/Dispensing Transactions	If this option is ticked and a message is added to the 'Message at POS' field in the patients account details, then the message will be displayed when the script is automatically charged.
Show Pharmacy Name on Statement Header	If this option is ticked then the pharmacy name will be printed on the statements header.
Show Pharmacy Name on Tear-off Slip	If this option is ticked then the pharmacy name will be printed on the remittance slip.
Show Owners Name on Statement	Prints the owners name on the statement.

Option	Definition
Pre Printed Statements	If you wish to use pre printed statements or statement templates tick this option. If you are using blank A4 paper it is recommended to untick this option.
Print 'Tax Invoice' on Statements	Tick this option if you wish to print a tax invoice on the statement.
Show GST when Listing Non-Current Statements	If this option is ticked it will show the GST and the Balance when viewing the list of Debtors statements (excludes current statement). If unticked only the balance of the statement will be shown.
Identify Individual Customers on Statements	If this option is not ticked then the debtor statement will just print the name of the debtor at the top of the statement. Although if this option is ticked it will use 'linked debtors' to print the name of the person who was charged for each of their individual transactions.
Show Drug Name for Prescriptions	If you wish to show the drug name for all the prescriptions on the patient's statement tick this option. If unticked only the script number is shown.
Display Hidden Edited Scripts	Tick this option if want deleted scripts to be shown on the statement. When the script was first dispensed it will be shown with a positive value, then the script will be listed a second time when deleted, this time showing a negative value. This is also the case for script price changes (LOTS Complete Only)
Hide Zero Charge Items	Tick this option if you want all item that are charged to the patient for \$0.00 to be shown on the statement (e.g. Safety Net scripts).
Message on Statement	This is a generic message that will appear on every statement, e.g. – "Thankyou for your prompt payment".

8.7 Options – Rollover Tab

The Rollover tab (Figure 322) allows you to choose if you would like to roll your accounts over by class, Set a cut off date on the Rollover ('End of Month' or 'Today') even apply a minimum Balance for the Rollover. Simply place a tick into the field that you wish to activate.

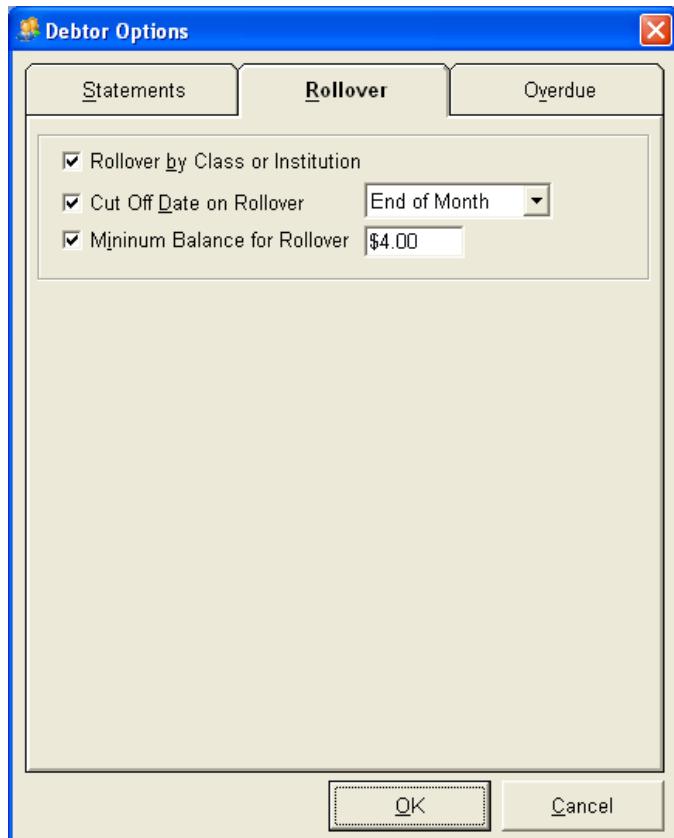


Figure 322

Option	Definition
Rollover <u>by</u> Class or Institution	If ticked this option will allow you to select an account class or institution to rollover – one-by-one. If unticked performing a single rollover will age all debtor statement simultaneously. It is only recommended to rollover by class or institution if you close off for different classes/institutions at different times.
Cut Off <u>Date</u> on Rollover	The cut off date for the rollover can be set to the 'End of Month' or 'Today'. If 'End of Month' is selected it will default to the last day of the previous month. This setting is to provide a default date only; a different date can be specified at the time of performing the rollover if desired.
Minimum Balance for Rollover	This field will allow you to specify the minimum balance to rollover. For example if this set to \$4.00 then all accounts that less than \$4.00 won't get rolled-over.

8.8 Options – Overdue Tab

The Overdue tab (Figure 323) allows you to apply over due charges onto account holders statements. ‘Statements Overdue Before a Charge is incurred’ allows you to select how many Statements you would like to be overdue before the overdue charges are activated.

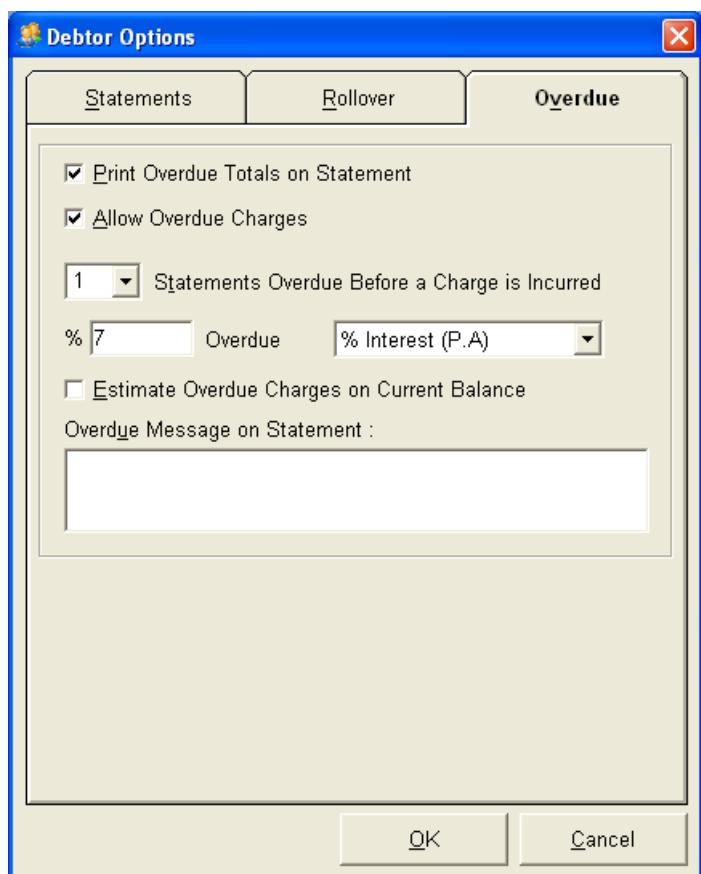


Figure 323

Option	Definition
<u>Print Overdue Totals on Statement</u>	If this option is ticked this will print overdue totals on statements.
<u>Allow Overdue Charges</u>	If this option is ticked this will allow you define and apply overdue charges to statements
<u>Statements Overdue Before a Charge is Incurred</u>	Use this drop-down box to determine how many overdue statements (1, 2 or 3) are to be rolled-over before charges are incurred.
Overdue	Define the charges incurred. Either: a percentage interest per annum or a fixed dollar amount.
%	If you have selected ‘% Interest (P.A.)’ then enter in the interest rate to be charged, calculated at each rollover period
\$	If you have selected ‘\$ (Fixed)’ then enter in a fixed dollar amount to be charged to the account.
<u>Estimate Overdue Charges on Current Balance</u>	If ticked, when viewing a debtor’s current balance an estimate of the overdue charges accrued will display at the bottom of the list on the statement.
<u>Overdue Message on Statement</u>	This field will allow you to print an overdue message, for example “Account Overdue, please pay immediately”.

8.9 Perform Rollover

Performing a rollover is the process of aging debtor statements before printing. It concludes one statement period and brings the balance forward to the current period.

To perform a rollover on monthly statements:

1. From the LOTS 'Debtors' screen, before rolling over the statements you need to make sure you choose the right statement date to rollover. Click on the 'Current' window (under 'Statement Date') as these are the current transactions (as shown in Figure 324).
2. Select the 'Perform Rollover' icon.
3. Select the 'Yes' button if you wish to proceed and start a new billing period.
4. You will be prompted to Key in your cut-off date. This can be changed if required (as shown in Figure 325). If your cut-off date is set to the 'End of Month', the date will default to the last day of the previous month.

Note: It is recommended that all trading has ceased for the date of rollover to avoid transactions of one date over two statement periods. Best practice is to perform an end-of-month rollover when the next month has commenced; selecting the cut-off date for rollover enables you to cut-off the statements at the previous date.

5. Select the 'OK' button to perform the rollover and return back to the 'Debtors' screen

Note: You can undo a previous rollover at any time by selecting Tools → Undo Rollover in the Debtors window.



Figure 324



Figure 325

8.10 Printing Statements

1. From the LOTS Debtors screen Click on the statement period you wish to print under 'Statement Date' (as shown in Figure 326).
2. You also have the option to:
 - **Print All Statements** – Selecting 'Print All Statements' will print all the statements for the statement period you have selected.
 - **Print Current View** – Selecting 'Print Current View' will print the debtor list as shown in the window.
 - **Print Selected Statements** – To print individual statements from a statement period highlight the debtor's statement(s) and then select 'Print Selected Statements'.
3. You can also print by class or institution using the 'By Class or Institution' option from the 'View' drop-down menu.



Figure 326

8.11 View Menu Options

The below options can be selected from the 'View' drop-down menu.

Option	Definition
<u>All</u> Debtors	This option will display all debtors on the screen.
<u>Overdue</u> → All Details	This option will display all debtors who are overdue.
Overdue → 1+ Statement	This option will display all debtors who are one statement over due.
Overdue → 2+ Statement	This option will display all debtors who are two statements over due.
Overdue → 3+ Statement	This option will display all debtors who are three statements over due.
<u>This</u> Statement	This option will display the highlighted debtors' statement for the 'Statement Date' period.
Statements for this <u>Account</u>	This option will display a list of every statement for the selected debtor. Along with some patient details it also shows the number, the date and the balance of each statement. You can view a statement by double-clicking on it.
<u>Stopped</u>	This option will display a list of all debtors whose accounts have been set to 'Stopped'.
Credit Limit Exceeded	This option will display all debtors who have exceeded their credit limit, but whose accounts are not necessarily set to 'Stopped'.
By <u>Class</u> or Institution	This option will allow you to display debtors by 'Account Class' or 'Institution'. When searching you will also have the option to exclude debtors whose accounts have a balance of zero.
Monthly <u>Totals</u>	This option will display the combined debtor totals for each statement period.
Transaction <u>Report</u>	This option allows you to view debtor transactions of either 'All Debtors', 'Debtor by Name' or 'Class'. Regardless of what option choose you will also need to select a date range.
Debtor Balances	This option will display all debtor balances (includes payments received and changes over the last three rollover periods). This also shows the class/institution that the debtor is associated with (if any).
Non-Zero Debtor Balances	This option will display all non-zero debtor balances (includes payments received and changes over the last three rollover periods). This also shows the class/institution that the debtor is associated with (if any).
<u>Control</u> Accounts	This option displays all control accounts (e.g. - institutions) and their balances.
<u>Sub</u> -Accounts	This option displays all sub-accounts (e.g. - institutions) and their balances.

8.12 Tools Menu Options

The below options can be selected from the 'Tools' drop-down menu.

Option	Definition
Perform <u>Rollover</u>	This rollovers all debtor statements. For more information refer to section: 8.9 – Perform Rollover .
<u>Edit Customer</u>	This will allow you to select a customer and once selected will allow you to edit their detail via the Patient Details window.
Edit <u>this Customer</u>	This will allow you to edit the highlighted customer's details via the Patient Details window.
<u>Journal Entry for this Debtor</u>	This will allow you to perform a journal entry for this debtor. For more information refer to section: 8.5 – Journal Entries .
Charge <u>OTC</u> item to Debtor	This will allow you to charge an OTC item to this debtor.
<u>Pay Account</u>	This allows you to make a payment to a debtors account For more information refer to section: 8.4 – Pay Account .
<u>Incorrectly linked debtors</u>	This will search and identify all incorrectly linked debtors
<u>Persons with a balance who are not a Debtor</u>	This will show all people who have balance but are not a debtor. In most cases these people used to be a debtor.
<u>Undo Rollover</u>	This allows you to undo a rollover. For more information refer to section: 8.9 – Perform Rollover .
Re-Calculate Current <u>Balances</u>	This allows you to refresh all debtor accounts. The program will check all debtor transactions and ensure the calculations are correct.
<u>Diagnostic</u>	This enables diagnostic options which are available to Corum Support Staff only.
<u>Group Journal Entry (Listed DEBTORS)</u>	This will do a journal entry for every debtor displayed in the current view. For example it could be a yearly fee for their membership.
Set <u>Discounts & Credit Limit by Class</u>	This will allow you to set a credit limit or a discount based on the debtor's class. This allows you to set certain debtor to have higher/lower credit limits and discounts.
<u>Options</u>	This allows you to set certain debtor options. For more information refer to sections: <ul style="list-style-type: none"> • 8.6 – Options – Statements Tab • 8.7 – Options – Rollover Tab • 8.8 – Options – Overdue Tab

9 Stocktake

For preparation for the end of financial year, you need to ensure that your stock on hand is accurate within LOTS. This can be achieved via any of the following methods:

- PharmaScan
- Rolling Stocktake Print-Outs
- Scanning Stocktake

A description of each of the stock take methods and instructions are contained in the following sections.

9.1 Rolling Stocktake

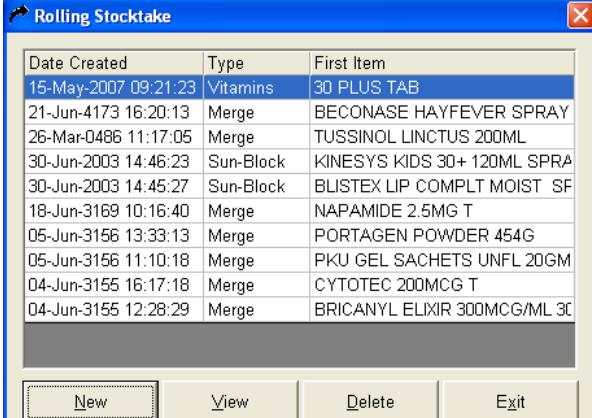
The Rolling Stocktake utility is a method of stocktaking whereby you generate a set of print-outs to take to the shelf for counting. The print-out displays the current SOH and allows space for you to write the correct SOH if different. After counting the section and writing the correct values on the print-out, return to the LOTS utility and enter any changed values.

Please Note: If the store is open and trading this must be done without delay.

The recommended procedure is to perform regular rolling stocktakes.

Having a process of regular rolling stocktakes should prevent the need for a rushed stocktake at the close of the financial year. Added benefits to this are accurate reporting and ordering throughout the year.

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Rolling Stocktake.



Date Created	Type	First Item
15-May-2007 09:21:23	Vitamins	3D PLUS TAB
21-Jun-4173 16:20:13	Merge	BECONASE HAYFEVER SPRAY
26-Mar-0486 11:17:05	Merge	TUSSINOL LINCTUS 200ML
30-Jun-2003 14:46:23	Sun-Block	KINESYS KIDS 30+ 120ML SPRAY
30-Jun-2003 14:45:27	Sun-Block	BLISTEX LIP COMPLT MOIST SF
18-Jun-3169 10:16:40	Merge	NAPAMIDE 2.5MG T
05-Jun-3156 13:33:13	Merge	PORTAGEN POWDER 454G
05-Jun-3156 11:10:18	Merge	PKU GEL SACHETS UNFL 20GM
04-Jun-3155 16:17:18	Merge	CYTOTEC 200MCG T
04-Jun-3155 12:28:29	Merge	BRICANYL ELIXIR 300MCG/ML 3C

Figure 327

2. The 'Rolling Stocktake' screen will display (as shown in Figure 327). Select the 'New' button to start a new rolling stocktake.



Include:

- All Stock
- Active Stock Only

No. of Products : 60

Filters:

Department	<input type="checkbox"/>	<input type="button" value=""/>
Sub-Department	<input type="checkbox"/>	<input type="button" value=""/>
Supplier	<input type="checkbox"/>	<input type="button" value=""/>
Stock Group :	<input type="checkbox"/>	<input type="button" value=""/>

Starting Point:

- End Of Last Stocktake
- Selected Stock Item

Stock Name : A

4. Highlight the rolling stocktake you want to check and select the 'View' button.

5. All of the products contained in the specified rolling stocktake will be listed (as shown in Figure 329). Select the 'Print' button to print a hard copy of the report.
6. At this stage you are required to count the items on the shelf and cross check these items on the printout. Ideally the SOH on the shelf should match the SOH on the printout. If these SOH figures differ, manually record the correct SOH figure on this printout.

Note: You can create several rolling stock takes at once so staff can be counting different sections at the same time. The Rolling Stocktake utility can be opened on several LOTS computers at once so different stock takes can be updated simultaneously if desired.

7. Once counted you are able to correct the SOH in the 'Actual SOH' column (as shown in Figure 329).
8. Once you have entered all of the correct stock on hand figures, choose the 'Save SOH Values' button or alternatively select the 'Save SOH & Clear Stocktake' button if you have completely finished working on that rolling stocktake.
9. Updating the correct SOH value in this column, will update the SOH in the stock cards.
10. To continue with the next section of the products in the same Department/Sub-Department. Supplier or Stock Group continue steps 1 – 9. Select the same 'Include' option (All Stock or Active Stock Only), the number of products you wish to display, the filter, but this time change the Starting Point to 'End of Last Stocktake', hence rolling stocktake. This will generate the next 60 products.
11. Continue this process until every product in your selection has been completed.



PLU	Item Name	Packsize	Cost	SOH	Actual SOH	Ret
618488	BM KIDS COLD DEF TAB 60 1	1	\$7.67	2	2	
177972	ACCOMIN ADULT TONIC 200M	1	\$22.74	1	1	
781516	ALOE VERA JUICE LEMON/LIP	1	\$11.32	0	0	
739144	AMC ACIDOPHILUS CAP 50	1	\$12.18	0	0	
731646	AMC B COMPLEX MEGA VALU	1	\$21.94	0	0	
047308	AMC BIO C LOW ACID 45TABS	1	\$7.50	1	1	
027516	AMC CALCIUM 600MG VIT D3	1	\$4.31	2	2	
731679	AMC CALCIUM PLUS MEGA V	1	\$10.23	6	6	
292904	AMC CHILDS MVM CHEW 100	1	\$8.81	2	2	
781419	AMC CO Q10 50MG CAP 30	1	\$7.79	16	16	
683987	AMC CO Q10 CAP 50MG 60	1	\$24.95	0	0	
731687	AMC COD LIVER OIL MEGA V.	1	\$4.00	24	24	
681205	AMC COLD SORE RLF TAB 60	1	\$7.20	3	3	
403267	AMC EFF B COMPLEX C 30S	1	\$10.14	26	26	
212365	AMC EO CELERY 3000MG 60S	1	\$3.86	13	13	

Figure 329

9.2 Electronic Stocktake

The Electronic Stocktake allows you to use a handheld device (PDE machine) to perform your stocktake.

1. Navigate from the LOTS Start Menu → Tools → Utilities → Stock Utilities → Electronic Stocktake.



Figure 330

2. This will display the 'Stocktake' window (see Figure 330). You will need to setup your handheld device, select the 'Settings' drop-down menu to do this.
3. Selecting setting will display the 'Stocktake Settings' window (see Figure 331). The first tab displayed is 'PDE Type'.
4. This tab allows you to select which handheld device you wish to use.

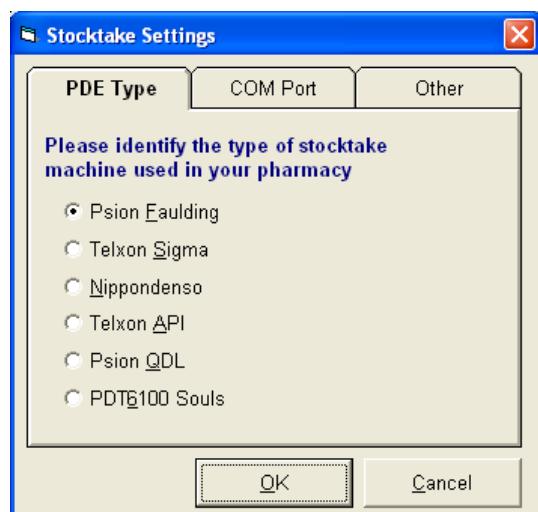


Figure 331

5. The 'COM Port' tab (see Figure 332) allows you to set your handheld device and its connection to your PC.

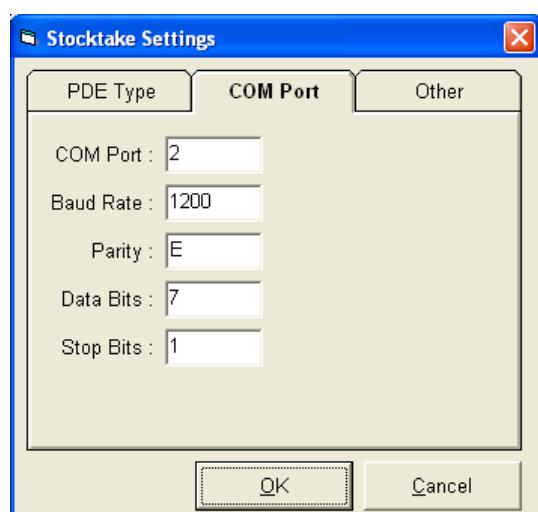


Figure 332

6. The third tab is 'Other' this tab allows you define where the data from the handheld device get saved to and what processing option you wish to use (see Figure 333). The two different processing option are:
 - **Replace SOH** – This will replace the current SOH.
 - **Add to SOH** – This will add the SOH to current SOH.
7. Once you have set all you settings press 'OK', this will return you to the 'Stocktake' window. You now have the ability to perform your stocktake.

Note: You may wish to zero your current stock on hand to zero before performing a stocktake. To zero your stock on hand refer to section **4.2 – Bulk Stock Card Changes**.

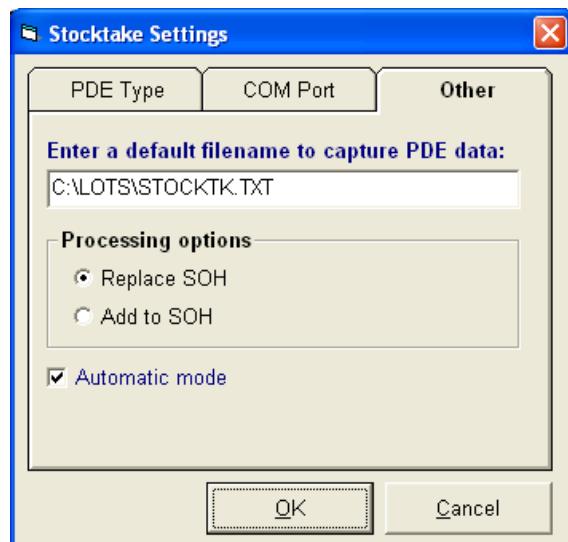


Figure 333

9.3 Special Stocktake

The 'Special Stocktake' module is normally only used by a third party stocktake company who wish to perform an external stocktake of your store and the read the stocktake back into LOTS.

9.4 Scanning Stocktake

A Scanning Stocktake is a quick and easy method of being able to modify stock on hand values.

This utility is useful for scanning items that are at hands reach and being able to quickly and easily amend stock on hand levels.

1. Navigate from the LOTS Start Menu
→ Tools → Utilities → Stock Utilities
→ Scanning Stocktake.
2. The 'Stock Search' screen will appear (as shown in Figure 334). From this point you can either scan the item, key in the PLU/PDE of the item or key in part of the description.
3. Select the 'Search' button to proceed.
4. When the item is displayed (Figure 335) on the screen you can amend the stock on hand to be the Actual Stock on Hand amount.
5. This program also allows you to change the retail price, which updates the stock cards accordingly.
6. Select the 'OK' button to record your changes.

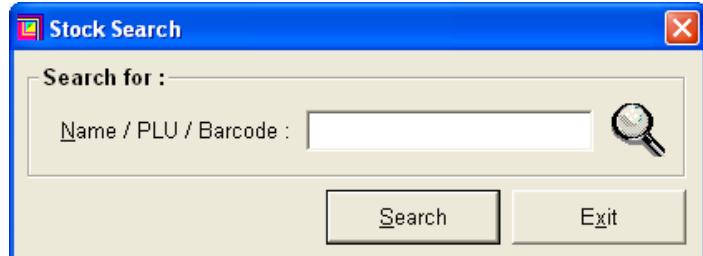


Figure 334

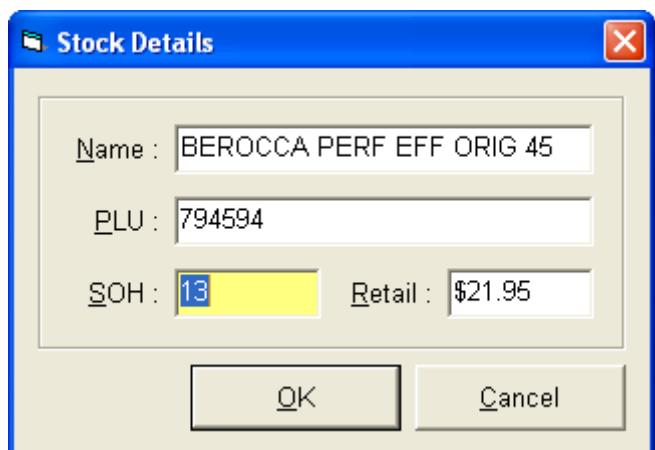


Figure 335

9.5 PharmaScan

Stocktaking with the PharmaScan is the preferred and easiest method of performing stocktakes in your store. The PharmaScan provides the following benefits with regards to stocktaking:

- Connected to your LOTS database in real-time you can stock take while the store is open and trading. The second that you key a SOH value it is directly updated into your LOTS database.
- Opt to count your front shop and your storeroom separately with PharmaScan prompting to add to the SOH total.
- Eliminates data transfer duplications and error potential.
- Review product sales data on the spot.
- Other benefits allow you to create and edit orders by simply scanning the required product. It also allows you to change prices and print new shelf labels.

For further information regarding the PharmaScan unit please contact your local state office.

Note: Corum also has a very limited number of PharmaScan units available for hire.

10 Reports

10.1 Exporting Reports

All reports in LOTS have the ability to be exported to various formats.

1. After report has been generated, select the export button from the display screen (see Figure 336).
2. Selecting the export button will provide you with a list of export formats. This list of formats may vary depending on the report you have chosen to export.
3. From the 'Export' list (Figure 337) select the format you wish to export to.
4. Once you have selected your format, select 'OK'.
5. The export type will then open up displaying the report.

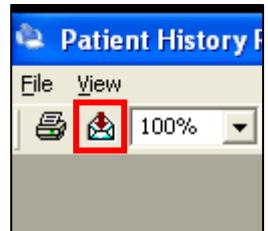


Figure 336

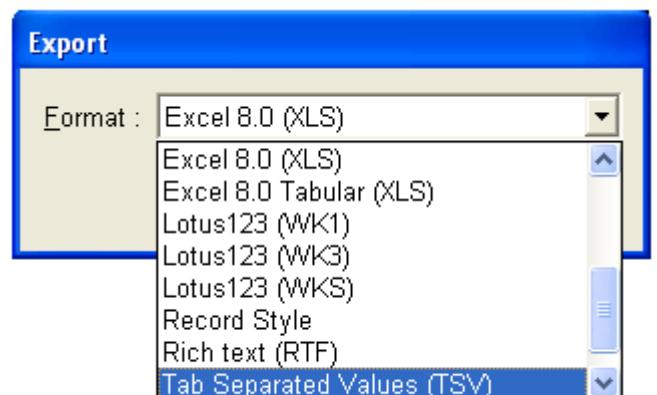


Figure 337

10.2 12 Month History Report

The 12 Month History Report displays sales information for the specified search criteria. You can specify to generate the report via Unit Sales, Dollar Sales, Cost of Goods or Gross Profit. No matter which method you choose all include the average and total sales for each item in the report.



Handy Hint!

This report is useful to run when doing bulk ordering over a season, for example, if you want to create a winter buy that will be delivered over several months. You can look at the same month ranges for the previous year to determine the sales history for these products.

A 12 Month History Report can also enable you to identify products which are not selling within the selected range as the 'Total' column will display the total sold over the 12 month period.

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → 12 Month History.
2. The 12 Month History screen will be displayed (see Figure 338).
3. Use the filter to define your search options. You will also need to define what you want to report on using the 'Show History as' options.
4. Finally choose to sort by 'Item Name' or 'PLU'.
5. Select 'OK' to generate the report.

Figure 338

Each filter is defined below:

Filter	Definition
Department	By selecting this option so that a tick appears in the check box, you will be able to select a department from the drop down list.
Sub-Department	By selecting this option so that a tick appears in the check box, you are able to select a sub-department from the drop down list. You will only be able to select a sub-department that is assigned to the department you selected.
Product Sub Group	If you have set up your stock cards with "Product Sub Groups" you are able to filter this report via product sub groups. By selecting this option so that a tick appears in the check box, you are able to select a product sub group from the drop down list.

Filter	Definition
<u>Supplier</u>	By selecting this option so that a tick appears in the check box, you are able to filter this report via "Supplier". Once you have selected this option, select the supplier from the drop down list. The report will display sales history for the supplier you have selected.
<u>Stock Group</u>	If you have set up any Stock Groups this option will be available and you will be able to filter this report for the items within the selected Stock Group. For more information on how to create stock groups refer to section: 4.3 – Stock Groups .
<u>Item Name</u>	By selecting this option so that a tick appears in the check box, you are able to generate this report for a specific item. You only need to key in the part of the item name, as the system will search for every item matching that criterion. The description that you key in has to be equivalent to the product name line in the stock card. For example - To generate a report on all Panadol products you would select the "Item Name" option and key in Panadol (or part of the word Panadol) as the product name. The system will produce a report displaying all items starting with the word Panadol.
<u>Active Stock Only</u>	By selecting this option so that a tick appears in the check box, you are able to generate this report for items that have been stocked, have stock on hand and have sales history. Active stock is defined as stock with SOH and/or SOO and/or Sales MTD and/or sales in the past 3 months.
<u>Include RX Sales</u>	By selecting this option so that a tick appears in the check box, you are able to filter this report to include Rx sales (Prescription sales). This will include items that have been dispensed and collected at the Point of Sale.
<u>Unit Sales</u>	When you select this option, the report displays a monthly breakdown of the actual sales for the items selected. This report also displays the Retail Price, Stock on Hand, Sales Month to Date and also for all months of the year. At the end of each column, the average sales for each item along with the total of sales for the entire year are displayed. The last page of the report displays the total sales for each month from the selected search.
\$ <u>Sales</u>	When you select this option, the report displays a monthly breakdown of the sales in dollars for the items selected. This report also displays the Retail Price, Stock on Hand, Sales Month to Date and the number of sales for all months of the past year. At the end of each column, the average sales for each item along with the total of sales for the entire year are displayed. The last page of the report displays the total sales for each month for each product.
<u>Cost of Goods</u>	When you select this option, the report is generated reflecting the actual real cost of the goods sold. The report also displays the Retail Price, Stock on Hand, Sales Month to Date and totals for each specified item for all months. This is the real cost at the time of each sale multiplied by quantity sold per month for each specified item for each month of the year. At the end of each column, the average sales for each item along with the total of sales for the entire year are displayed. The last page of the report displays the total real cost dollar value of sales for each month from the selected search. Note: The totals in each column are rounded dollar values which have either been rounded up or down accordingly. Eg: if the total for a particular month is 211 then the Cost of Goods Sold (excluding GST) is actually between \$211.00 and \$212.00.

Filter	Definition
\$ Gross Profit	<p>When you select this option, the report is generated displaying the history of sales via dollar value on gross profit (excluding GST). The report also displays the Retail Price, Stock on Hand, Sales Month to Date and also for all months of the year. At the end of each column, the average sales for each item along with the total of sales for the entire year are displayed. The last page of the report displays the total retail dollar value of sales for each month from the selected search.</p> <p>Note: The totals in each column are rounded dollar values which have either been rounded up or down accordingly. Eg: if the total for a particular month is 211 then the \$ Gross Profit (excluding GST) is actually between \$211.00 and \$212.00. If wanting to determine the non-rounded Gross Profit totals via Product Group these actual values can be found in the Product Group Report for the nominated month range and select the product group that you want to view. In the Gross Profit (\$) column displays the actual gross profit for the Product Name multiplied by the Qty sold.</p>

12 Month Detailed History on Retail of Goods (including GST)

CORUM HEALTH SERVICES
 7 BUSINESS PARK DRIVE
 NOTTING HILL
 VIC 3168
 Ph: 03 8541 6988
 Fax: 03 8541 6989

PLU	UPI	Item Name	Retail	SOH	MTD	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Avg	Total
790945		AD BIB COWBOY PRINT	14.95	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
790947		AD BIB TOWEL BABY HONEY C	14.95	0	0	0	0	15	0	0	0	0	0	0	0	0	0	1	15
790882		AD JOINTED TOY HORSE COWBO	39.95	0	0	40	0	0	0	0	0	0	0	0	0	0	0	3	40
716530		AMC BABY BOTTLE 125ML	5.95	3	0	0	0	0	0	12	0	18	18	0	0	0	0	4	48
716548		AMC BABY BOTTLE 250ML	6.95	3	0	14	35	14	0	7	0	7	0	0	0	0	0	6	76
974021		AMC BABY OIL 200ML	3.90	3	0	0	4	0	6	4	0	8	8	4	0	0	0	3	33
974234		AMC BABY POWDER 375G	3.50	1	0	2	0	0	0	2	0	2	0	0	3	0	0	1	9
695247		AMC DIS NAPPIES 32 XLG CTN4	15.50	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
695189		AMC DISP NAPPIES 36 LARGE C	15.50	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
959340		AMC INFNT FORMULA 980 0 6M	13.45	0	0	0	13	0	0	0	0	0	0	0	0	0	0	1	13
959359		AMC INFNT FORMULA 980 FOL0	12.00	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
976377		AMC MOTHER BE NURSING PA	9.95	3	0	0	10	0	0	0	0	0	0	0	0	0	0	1	10
989886		AMC NAPPY RASH CREAM 100	4.95	5	0	10	10	10	0	0	5	10	0	5	0	0	0	4	50
581330		AMC THICK WIPES PK100	5.60	12	0	6	6	6	11	11	6	22	6	27	28	0	0	11	128
581348		AMC THICK WIPES TRAVEL PK	2.50	5	0	0	0	3	3	3	3	5	0	3	0	0	0	1	18
975699		AMC ZINC CASTOR OIL CREAM 1	5.45	11	0	0	22	16	0	0	5	0	0	0	5	0	0	4	49
771254		AMEDA 1/HAND PUMP HYGENKI	88.00	2	0	0	0	0	0	0	88	0	0	0	0	0	0	7	88
771255		AMEDA 1/HAND PUMP HYGENKI	70.00	1	0	0	0	0	0	0	0	70	0	0	0	0	0	6	70
771269		AMEDA PARTS DIAPHRAGM	10.95	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
771266		AMEDA PARTS VALVE VENT	3.95	0	0	0	0	0	0	0	8	0	0	0	0	0	0	1	8
771258		AMEDA PUMP HANDLE	32.20	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
771272		AMEDA PURELY YOURS BREA	310.00	1	0	310	0	0	0	0	0	0	0	0	0	0	0	26	310
705039		AMOLIN BABY CRM 100G	8.55	5	0	9	17	0	9	9	9	0	0	0	0	0	0	4	51
741213		AMOLIN BABY CRM 50G	6.00	5	0	12	12	0	0	6	0	12	6	0	18	0	0	6	66
901475		AROMABABY AROMAWIPES 30	8.95	3	0	8	0	0	8	0	0	0	0	0	0	0	0	1	16
786944		AROMABABY BABY MASSAGE O	13.95	1	0	14	0	0	14	13	0	0	0	0	14	0	0	5	54
901469		AROMABABY BAR SENSITIVE 1	7.50	3	0	0	0	8	8	0	0	0	5	0	0	0	0	2	20
797546		AROMABABY BARRIER BALM 1	26.95	4	0	0	0	0	0	0	0	27	54	54	44	0	0	15	179
901463		AROMABABY BARRIER BALM 2	10.95	5	0	11	11	11	22	11	0	38	0	0	0	0	0	9	103
778143		AROMABABY BATH GEL 125ML	11.95	8	0	0	0	0	32	0	0	0	0	0	0	0	0	3	32
901455		AROMABABY BATH GEL 250ML	21.00	6	0	42	28	0	63	84	40	40	42	56	0	0	0	33	395
901468		AROMABABY CLEANSING BAR 1	7.50	2	0	8	0	8	0	0	0	0	0	0	0	0	0	1	15

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Baby, Active Stock, Including Rx Sales,

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Column Name	Definition
Trade Name	This displays the name of the items selected within the report.
Retail	This displays the current Retail price of the item.
SOH	This displays the current stock on hand for each line. You should frequently perform stock takes to ensure that your stock on hand is correct.
MTD	This column displays the current sales Month To Date for each line.
Months	The 12 columns across the page display each of the 12 months of the year starting from the previous month and going back for 12 months. These columns would either reflect a dollar value or quantity sold depending on the search criteria.
Average	This is the column headed 'Avg' which is the average cost of the goods sold or the average dollar value for the year. This average is calculated from the Total Column and divided between 12.
Total	The last column headed 'Total' displays either the quantity sold or the total dollar value of sales for the 12-month period, depending on the search criteria.
Total	The 'Total' that is at the bottom of the report displays the totals for each month either being quantity sold or the total dollar value of items sold, depending on the search criterion. The average is also included in this column for the average over the 12-month period.

10.3 Stock List & Value Report

The Stock List and Value Report displays a listing of stock information dependent on the search criteria specified. Included in the report are the item's PLU (price lookup number), Trade Name (descriptions of each item), List Cost, Real Cost, Average Cost, Mark Up, Retail Price, SOH (stock on hand) and the Extended Value (which is the cost that the report was generated via e.g.: List, Real or Average Cost multiplied by the Stock on Hand).

At the very end of the report the total stock on hand is shown for the selected search, along with the extended value for all items.

 **Handy Hint!**

This report is a quick and effective method of obtaining information of stock on hand and the actual costs of products that are covered by the selected search criterion.

Within the Stock List and Value Report you can obtain a listing of all stock on hand for the whole store. Selecting "Active Stock Only" then "Search" when you are prompted to enter in the search filter will do this. This is effective at the end of financial year for when you have to give your accountant all of your stock on hand values.

Remember: You should constantly stock take the store to ensure that the actual stock on hand reflects the same figures in your stock cards.

How to perform a Stock List and Value report

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → Stock List and Value.
2. The 'Stock List Report' screen will be displayed (as shown in Figure 339).

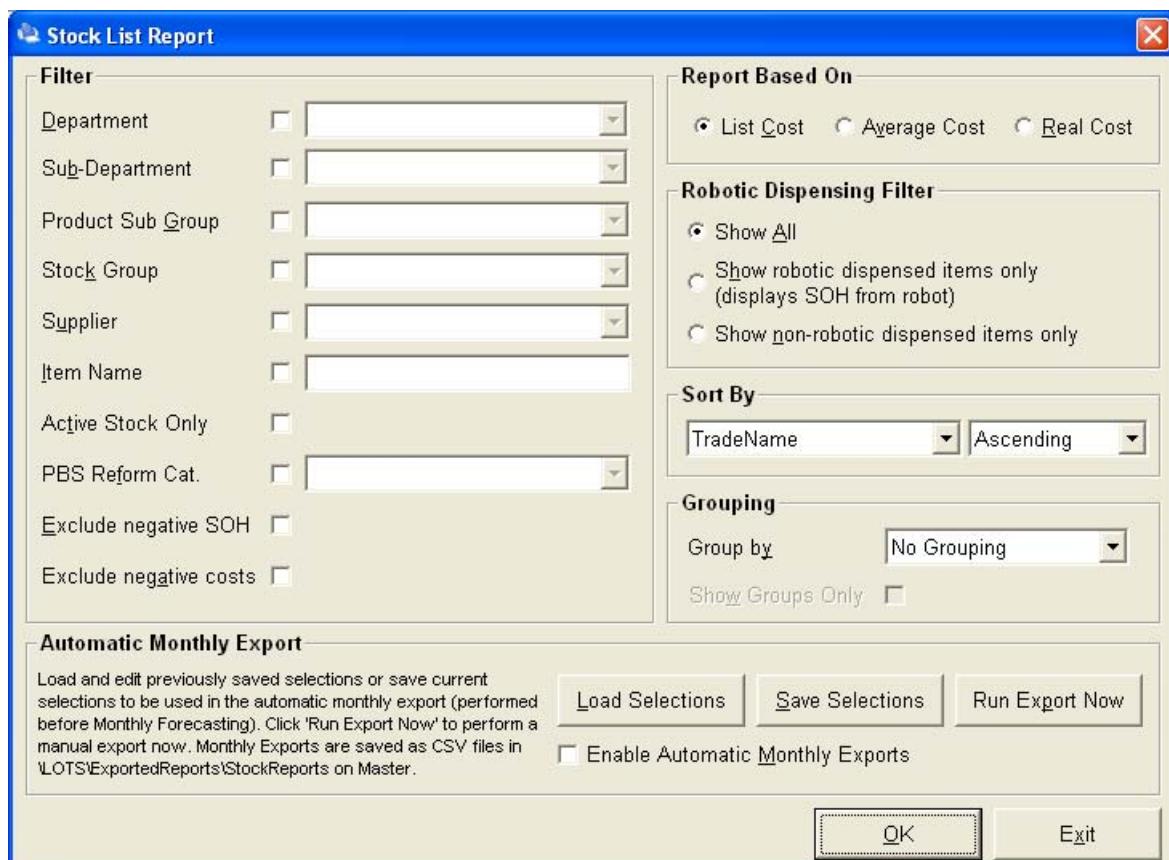


Figure 339

3. This gives you the option to specify whether to generate a report based on a number filters including Department particular Item Name. You can also choose to include Active Stock Only.
4. If you use a robot to dispense your drugs you can use the 'Robot Dispensing Filter' (see Figure 340). This filter has three options to chose from:
 - **Show All** (default) – This option will show all dispensed items.
 - **Show robotic dispensed items only (uses SOH from robot)** – This option will only show items dispensed from the robot.
 - **Show non-robotic dispensed items only** – This option will only show non-robotic dispensed items.

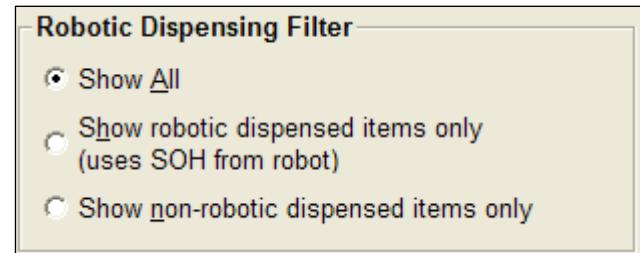


Figure 340

5. The Stock List and Value report also has 'Sort By' option allows you to select a field to sort by Ascending or Descending order. There are
 - Trade Name
 - Retail
 - List Cost
 - Real Cost
 - SOH
 - Mark Up

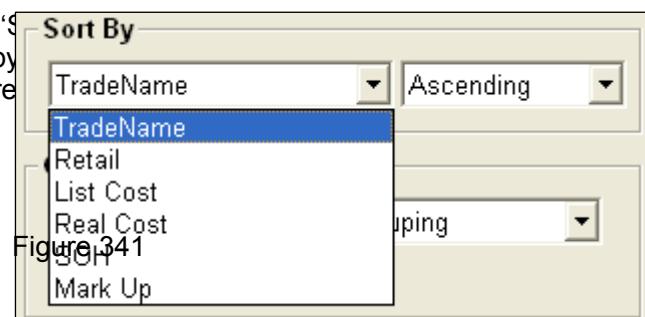


Figure 341

The default values for the 'Sort By' options are 'Trade Name' and 'Ascending'.

6. If you wish you can choose to group the report (see figure 342). There are three grouping options:
 - **No Grouping (default)** – This will
 - **Department** – If this option is selected then all the products in this department will be listed together.
 - **Sub-Department** – If this option is selected then all the products in this sub-department will be listed together.



Figure 342

7. You also have the ability to 'Show Groups Only' (see Figure 342). If this option is ticked only the department/sub-department subtotals will be shown. If this option is not ticked every item contained in the department(s)/sub-department(s) will be shown.

Note: The 'Show Groups Only' option will only be active if either department/sub-department is selected from the 'Group by' drop-down list.

8. Once you have chosen your criteria select the 'Search' button to generate the report.

Below is an explanation of each of the cost filter listed in the 'Stock List Report' window

Filter	Definition
List Cost	When you generate your "Stock List and Value Report" you must specify a costing, List, Average or Real Cost. LOTS automatically selects List Cost for the report but you can change the cost type if

	desired. List Cost is the highest possible price that you pay for the item when you order it from your Wholesaler or Supplier. You should never change this price unless the supplier has amended it. With your wholesalers, these prices automatically update during the process of collecting electronic invoices or price updates. The "List Cost" report reflects list cost excluding GST in relevant columns including the extended value and the total at the bottom of the screen.
Average Cost	When you select "Average Cost" the "Stock List and Value Report" is generated to reflect the average costs of the goods. The Average Cost is an average of the real cost, and is recalculated when the stock is entered in via Orders or Stock cards.
Real Cost	By selecting "Real Cost" the report will be generated to reflect the real costing. Like with the List and Average Cost reports these totals also exclude GST. The extended value and totals at the bottom are calculated with Real Cost. The Real Cost is the cost that you have actually paid for the goods which is usually the best buy price from the wholesaler and/or supplier. You can amend the Real Cost as often as desired. These prices also automatically update when you process your invoices.

Stock List Report based on List Cost

CORUM HEALTH SERVICES
 7 BUSINESS PARK DRIVE
 NOTTING HILL
 VIC 3168
 Ph: 03 8541 6988
 Fax: 03 8541 6989

PLU	Trade Name	List	Real	Ave	Mk Up	Retail	SOH	Ext. Val
790945	AD BIB COWBOY PRINT	\$6.88	\$6.88	\$6.88	98%	\$14.95	1.0	\$6.88
716530	AMC BABYBOTTLE 125ML	\$3.17	\$3.17	\$3.17	71%	\$5.95	3.0	\$9.51
716548	AMC BABYBOTTLE 250ML	\$3.71	\$3.71	\$3.71	70%	\$6.95	3.0	\$11.13
173229	AMC BABY OIL 200ML	\$2.15	\$2.15	\$2.04	65%	\$3.90	3.0	\$6.45
136655	AMC BABY POWDER 375G	\$2.01	\$2.00	\$2.00	58%	\$3.50	1.0	\$2.01
695247	AMC DIS NAPPIES 32 XLG CTN4	\$11.68	\$11.68	\$11.68	21%	\$15.50	2.0	\$23.36
695189	AMC DISP NAPPIES 36 LARGE CTN4	\$11.68	\$11.68	\$11.68	21%	\$15.50	4.0	\$46.72
194837	AMC INFNT FORMULA 980 FOLLOW ON	\$10.68	\$10.68	\$10.68	12%	\$12.00	1.0	\$10.68
097790	AMC MOTHER BE NURSING PAD PK4	\$6.78	\$6.78	\$6.70	33%	\$9.95	3.0	\$20.34
178491	AMC NAPPYRASH CREAM 100G	\$3.05	\$3.05	\$3.05	48%	\$4.95	5.0	\$15.25
581330	AMC THICK WIPE PK100	\$3.63	\$2.69	\$2.88	40%	\$5.60	12.0	\$48.56
581348	AMC THICK WIPE STRAVEL PK20	\$1.78	\$1.78	\$1.78	28%	\$2.50	5.0	\$8.90
136689	AMC ZINC CASTOR OIL CREAM 100G	\$3.60	\$3.42	\$3.42	38%	\$5.45	11.0	\$39.60
771254	AMEDA 1HAND PUMP HYGENKIT DBL	\$50.11	\$50.11	\$49.79	60%	\$88.00	2.0	\$100.22

10.3.1 Automatic Monthly Report

The Stock List and Value report also has a 'Automatic Monthly Export' module. If you tick the 'Enable Automatic Monthly Exports' option (see Figure 343) then a report will be automatically generated at the start of each month (prior to the 'Monthly Forecasting' taking place).

These monthly reports are automatically saved to a folder called 'StockReports' (see Figure 344). The 'StockReports' folder can be located by navigating from the LOTS Start Menu → Reports → Exported Reports.

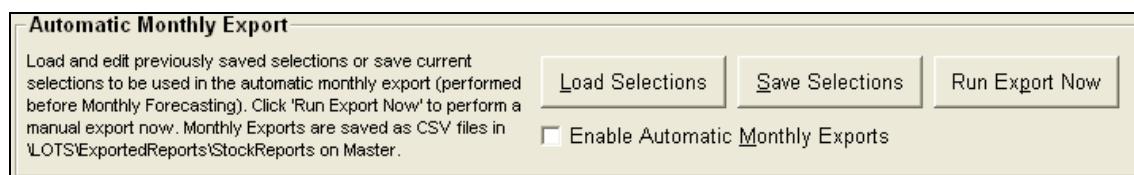


Figure 343

1. Use the main screen to set the filters that you would like the monthly report to be based on. Once set, select 'Save Selections'. You will then be prompted to enter your Staff ID.

Note: Only one selection can be saved, but this saved selection can be changed at any time by changing the filters and selecting 'Save Selections'.

2. While the export will automatically take place at the start of each month, this can also be run manually at any time. To manually run the report select 'Load Selections' and then 'Run Export Now'. When 'Load Selections' is selected the screen will change to match all the filters that were set the last time 'Save Selections' was used.

Note: 'Load Selections' will only work if you have saved a selection.

Note: Unlike other reports created by LOTS these will not be overwritten (unless two reports are created on the same day) as the files are saved with a date stamp (e.g. - 2009-07-01).

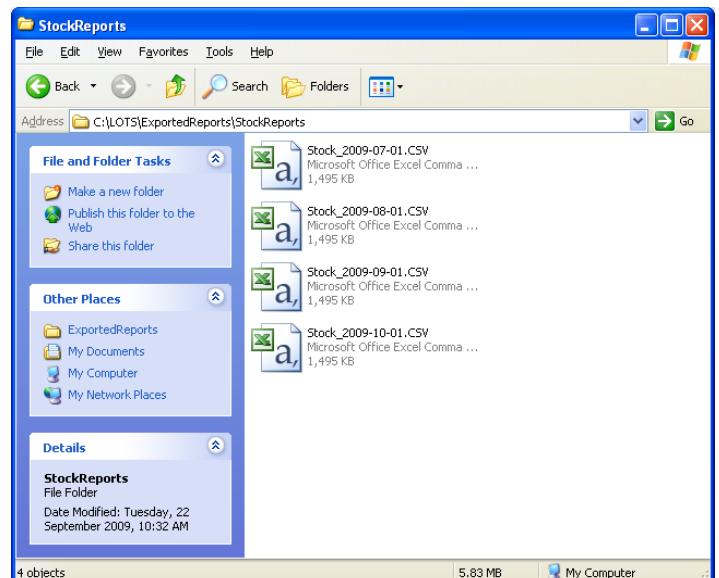


Figure 344

10.4 Overstocked/Dead Items

An 'Over Stocked/Dead Items' report displays a listing of any items that the system considers as overstocked or dead. An overstocked item is an item that has a stock on hand quantity that is too high according to sales history. A dead item is an item that has not sold in the last three to six months. Included in the report is the item 'PLU' (price lookup number), 'Trade Name' (descriptions of each item), 'Department', 'Sub-Department', 'Product Sub Group', 'Months to Sell', 'SOH' (stock on hand) and the 'Extension Cost' ('List Cost' multiplied by the 'Stock on Hand'). The last page of the report displays the 'Total Extended Cost' and the 'Total Required Cost' for all items within the selected criteria.



Handy Hint!

This report can help you to optimise the LOTS inventory systems by eliminating products that you have too much stock of or that are simply not selling. This can help you determine products that are not selling and therefore you could put them on special to make room for newer items that could be selling well. This report should be run regularly to keep track of excess stock on hand and the dollar values that are tied up in these particular items.

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → Overstocked/Dead Items.
2. The Overstocked/Dead Items screen will be displayed (as shown in Figure 345).
3. This is where you select your filter/s for the search.
4. You are able to select more than one filter however you must select from either Overstocked or Dead items.

Figure 345

Filters	Definition
<u>Department</u>	By selecting this option so that a tick appears in the check box, you will be able to select a department from the drop down list.
<u>Sub-Department</u>	By selecting this option so that a tick appears in the check box, you are able to select a sub-department from the drop down list. You will only be able to select a sub-department that is assigned to the department you selected.
<u>Product Sub Group</u>	If you have set up your stock cards with "Product Sub Groups" you are able generate this report via product sub groups. By selecting this option so that a tick appears in the check box, you able to select a product sub group from the drop down list.
<u>Supplier</u>	By selecting this option so that a tick appears in the check box, you are able to generate this report via "Supplier". Once you have selected this option, select the supplier from the drop down list. The report will display over stocked and or dead items for the supplier you have selected.

Filters	Definition
Item Name	<p>By selecting this option so that a tick appears in the check box, you are able to generate this report for a specific item. You only need to key in the part of the item name, as the system will search for every item matching that criterion. The description that you key in has to be equivalent to the product name line in the stock card.</p> <p>For example to generate a report on all Panadol products you would select the 'Item Name' option and key in Panadol as the product name. The system will produce a report displaying all items starting with the word Panadol.</p> <p>To generate a report on all items starting with "Pana", you would select the 'Item Name' option and key in "Pana" as part of the product name. The system will produce a report for all items starting with "Pana".</p>
Suppress items where Cost*SOH is less than	The dollar value that you specify here is the list cost of each product multiplied by the actual stock on hand. E.g. If you enter the dollar value of \$25, when the report is generated it will only display items that are over \$25 in extended costs.
Months considered overstocked or dead	You can narrow down the months a report is based on by specifying them here. LOTS will consider the selected months when generating the report and only search within that month range.
Over Stock/Not Dead Items	Select this option if you want to generate a report for over stocked items. The report will display information for the 'Months Considered Over Stocked' period that you have specified. They are still active items with sales history; however you have too many stock holdings of them.
Dead Items	<p>Select this option if you want to generate a report for dead items. The report will display information for the 'Months Considered Over Stocked or Dead' period that you have specified.</p> <p>Dead Items are defined as items that haven't been sold for the period specified.</p>

Over Stock Items

CORUM HEALTH SERVICES
 7 BUSINESS PARK DRIVE
 NOTTING HILL
 VIC 3168
 Ph: 03 8541 6988
 Fax: 03 8541 6989

PLU	Tradename	Sub Dept	Department	Mths to Sell	SOH	Extn Cost
794694	BEROCCA PERF EFF ORIG 45	Vitamins	Vitamins	8	12	\$229.68
790987	HIPP GIFT TAGS	cards	cards	28	97	\$24.25
576174	LIBRA INVISIB 10 WNG SUP	Feminine hygiene	Feminine hygiene	11	16	\$87.36
788897	POLAR SERENE TISSUES 2PL	Paper Prods	Paper Prods	3	4	\$2.80
				Total Extended Cost		\$324.09
				Total Required Cost		\$34.34

Dead Stock Items

CORUM HEALTH SERVICES
 7 BUSINESS PARK DRIVE
 NOTTING HILL
 VIC 3168
 Ph: 03 8541 6988
 Fax: 03 8541 6989

PLU	TradeName	Sub Dept	Department	Mths to Sell	SOH	Extn Cost
793405	2 PEAS CANDLE BLOOD ORAN	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	2	\$10.76
793408	2 PEAS CANDLE CUCUMB G/F	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	2	\$10.76
772462	2 PEAS HOME SPRAY 125ML	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	2	\$12.96
778732	2 PEAS LAUNDRY WASH SACH	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	2	\$11.50
782447	2 PEAS LILAC LINEN WATER	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	1	\$7.70
778743	DISC 2 PEAS CLEAN 300ML	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	1	\$5.43
780415	DISC 2 PEAS CUCUMBER BAT	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	1	\$5.89
780416	DISC 2 PEAS CUCUMBER BOD	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	1	\$5.89
780419	DISC 2 PEAS EAU DE FRANGIPA	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	1	\$7.70
780418	DISC 2 PEAS EAU DE VANILLA	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	2	\$15.40
772323	DISC 2 PEAS PUMP ATTACHMEN	2 PEAS IN A PO	2 PEAS IN A POD	Unknown	5	\$10.00
Total Extended Cost						\$103.99
Total Required Cost						\$0.00

Filters	Definition
PLU	This displays the product PLU (price look up number), which is either the wholesaler's PLU or a system generated PLU for supplier lines.
Trade Name	This displays the name of the items selected within the report.
Sub-Department	This displays the 'Sub-Department' for all items within the report.
Department	This displays the 'Department' for all items within the report.
Months to Sell	This displays how many months the system estimates it will take for you to sell out of these items, taking into account the months considered over stocked or dead.
SOH	This displays the current stock on hand for each specified item. You should frequently perform stock takes to ensure that your stock on hand is correct.
Extended Cost	This is the list cost multiplied by the 'Stock on Hand' for each item within the 'Over Stocked/Dead Items' report.
Total Extended Cost	The 'Total Extended Cost' is the total of each product within the report's 'Extended Cost', and is displayed on the final page of the report. The 'Total Extended Cost' will vary depending upon the number of months that you have selected as 'Months Considered Over Stocked or Dead'.
Total Required Cost	When you subtract the 'Total Required Cost' from the 'Total Extended Cost' the amount that is remaining is the amount that is the 'Excess Stock Value' based upon the search criteria that you selected.

10.5 Top/Worst Items

A 'Top/Worst Items Report' report displays your best or worst selling items within a specified date range. As with all the other reports, you are able to select your preferred filter to search. The report for top items can be generated for 'Units Sold', 'Sales Value' and/or 'Profit'. A report generated for 'Worst Items' is displayed via return on capital.

Included in the report are the 'Trade Name' (descriptions of each item), 'PLU', 'Department', Sub-Department and 'Product Sub Group', plus units sold on the 'Top Items' report and return on capital on the 'Worst Items' report. 'List Cost', 'Real Cost', 'Average Cost', 'Mark Up', 'Retail Price', 'SOH' (stock on hand) and the 'Extended Value' (which is the 'List Cost' multiplied by the 'Stock on Hand') are also shown on the latter report. At the very end of the report the total stock on hand is shown for the selected search, and the extended value for all items.



Handy Hint!

These reports display with information of your top and worst selling items. When generating a 'Worst Items' report, items that are not selling between the specified date ranges will be displayed. This report is extremely useful to a business as you can either nominate to not-reorder these items and/or reduce the retail price to clear them out.

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → Top/Worst Items.
2. The Top/Worst Items screen will be displayed (as shown in Figure 346).
3. This is where you select your filter/s for the search.
4. You have the ability to select multiple filters for the report however you must select a 'Report By' option.

Figure 346

Filters	Definition
Beginning Month	This is the date that you wish the report to begin from. Select the date from the drop down menu listing for commencement of month and year.
End Month	This is the date that you wish the report to search until. Select the date from the drop down menu listing for end of month and year.
<u>Department</u>	By selecting this option so that a tick appears in the check box, you will be able to select a department from the drop down list.
<u>Sub-Department</u>	By selecting this option so that a tick appears in the check box, you able to select a sub-department from the drop down list. You will only be able to select a sub-department that is assigned to the department you selected.

Filters	Definition
Product Sub Group	If you have set up your stock cards with 'Product Sub Groups' you are able to filter this report via product sub groups. By selecting this option so that a tick appears in the check box, you able to select a product sub group from the drop down list.
Stock Group	By selecting this option so that a tick appears in the check box, you are able to filter this report via 'Stock Group'. Once you have selected this option, select the stock group from the drop down list. The report will display top/worst items for the stock group you have selected.
Supplier	By selecting this option so that a tick appears in the check box, you are able to filter this report via 'Supplier'. Once you have selected this option, select the supplier from the drop down list. The report will display top/worst items for the supplier you have selected.
Item Name	<p>By selecting this option so that a tick appears in the check box, you are able to filter this report for a specific item. You only need to key in the part of the item name, as the system will search for every item matching that criterion. The description that you key in has to be equivalent to the product name line in the stock card.</p> <p>For example to generate a report on all Panadol products you would select the 'Item Name' option and key in Panadol as the product name. The system will produce a report displaying all items starting with the word Panadol.</p>
Units Sold	Select this option if you want to report via 'Units Sold' for the 'Top Items Report', the report will list the 'Trade name', 'PLU', 'Product Group', 'Product Sub Group' and 'Units Sold' for the specified search criteria, including items that have been stocked, have stock on hand and have sales history.
Sales Value	Select this option if you want to report on 'Top/Worst Items Report' via 'Sales Value' for the top items sold, the 'Trade name', 'PLU', 'Department', 'Sub-Department', 'Product Sub Group' and the 'Value Sold' for the specified date range will be displayed. The value sold is the quantity sold multiplied by the retail price.
Profit	Select this option to generate a 'Top Items Report' using 'profit'. The report will list the 'Trade name', 'PLU', 'Department', 'Sub-Department', 'Product Sub Group' and 'Profit Excluding GST' for the specified search criteria.
Return on Capital	Select this option if you want to generate a report to reflect the 'Worst Items upon Return on Capital'. The 'Return on Capital' is the 'List Cost' multiplied by the 'Stock on Hand'.
Sort Alphabetically	Select this option if you want the report to be sorted alphabetically. The report will display in alphabetical order as opposed to the order of highest values.

Top Items based on Units Sold 01-Jun-2000 to 30-Jun-2000

CORUM HEALTH SERVICES
 7 BUSINESS PARK DRIVE
 NOTTING HILL
 VIC 3168
 Ph: 03 8541 6988
 Fax: 03 8541 6989

Trade Name	PLU	Sub Dept	Department	Units Sold
PRESSCRIPTION	990012	Ethicals	Ethicals	1645
PHOTOS - DEVELOPING & PRINTING	990013	Dev & Print	Dev & Print	424
CHEMIST SUNDRIES	902168	Ethicals	Ethicals	279
GREETING CARD	902163	cards	cards	113
VENTOLIN CFCFREE INH 200 DOSE	687588	Ethicals	Ethicals	100
DISC GIFTS	990014	Gifts	Gifts	76
GLUCOJELS 70G SMALL	599410	Confection	Confection	72

Filters	Definition
Trade Name	This displays the name of the items selected within the report.
PLU	This displays the product PLU (price look up number), which is either the wholesaler's PLU or a system generated PLU for supplier lines.
Sub-Department	This displays the 'Sub-Department' for all items within the report.
Department	This displays the 'Department' for all items within the report.
Units Sold	This display the total 'Units Sold' for each 'Trade Name' within the search if you have generated the report via 'Units Sold'.

10.6 Department Sales Report

A 'Department Sales Report' provides a listing of all sales performed for either '12 Month Sales' or a specified 'Date Range'. This report will show each Department (or Sub-Department) that had sales within the report selected.

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Department Sales Report.
 2. A screen will be displayed (as shown in Figure 347).
 3. Select the method that you wish to produce the report on. Either by:
 - **12 Month Sales** – The previous 12 Month Sales.
 - **Date Range** – Any date range you specify.
- Note:** If you select the 'Date Range' option you must specify a 'Start' and 'End' date.
4. Then specify if you wish to report on 'Department' or 'Sub-Department'.
 5. Select 'OK' to generate the report.
 6. Once you have the 'Department Sales Report' displayed on the screen you can drill-down to any individual 'Department' to view the sales data that has occurred within that Department. To do this, simply double click on a Department name.

Using the '12 Month Sales' option, the report shows:

Filters	Definition
Sales (\$)	The total sales revenue for the month.
NHS (\$)	The total NHS sales revenue for the month,
GST (\$)	The total GST for the month.
Profit (\$)	The total profit in dollars for the month.
GP (%)	The gross profit as a percentage for the month.

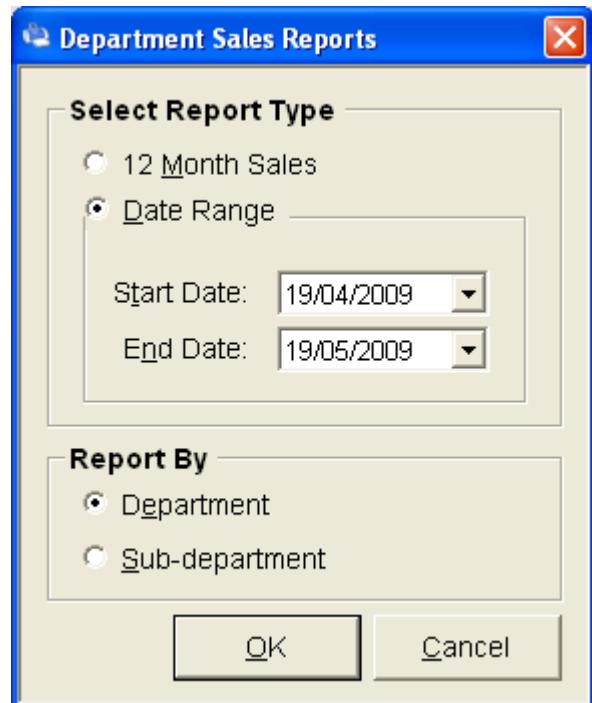


Figure 347

Department Sales Report

19-07-2008 to 19-08-2008

Corum Health Services
7 BUSINESS PARK DRIVE
NOTTING HILL VIC 3168

Department	Product Name	Qty	Total Sales (\$)	NHS (\$)	GST (\$)	Gross Profit (\$)	GP (%)	Stock Value (\$)	SOH	Rt\$/Yr	Rt\$y
[No Department]		13	172.20	0.00	9.49	61.51	36	2,708.46	927	0.73	0.16
ANTIFUNGALS		0	0.00	0.00	0.00	0.00	0	23.43	2	0.00	0.00
ASTHMA		1	14.95	0.00	0.00	7.48	50	252.94	31	0.67	0.37
BABYCARE		61	809.45	0.00	23.25	151.11	19	1,934.79	269	4.77	2.59
BATTERIES		8	70.40	0.00	5.83	26.32	41	191.74	49	4.19	1.86
DENTAL		19	136.60	0.00	12.41	54.99	44	319.43	77	4.88	2.81
DEODORANTS		5	33.75	0.00	3.06	12.28	40	167.29	48	2.30	1.19
DIABETES		24	102.70	152.80	4.51	74.00	29	654.05	132	1.79	2.07
DOWARDS		72	496.10	0.00	45.08	202.27	45	2,753.38	896	2.06	0.92
EAR CARE		8	115.60	0.00	9.44	46.91	44	307.66	53	4.29	1.72
Ethicals		1,890	17,117.20	38,727.17	31.67	17,833.72	32	37,042.44	2,246	5.27	9.60
EYE CARE		14	163.30	0.00	5.87	66.62	42	606.90	88	3.07	1.81
FIRST AID		140	1,556.63	74.27	122.55	522.62	35	5,850.73	1,166	3.03	1.37
FOOT CARE		2	22.40	0.00	2.04	8.85	43	463.72	84	0.55	0.27
GIFTS		0	0.00	0.00	0.00	0.00	0	79.58	10	0.00	0.00
HAIR CARE		45	653.80	0.00	59.40	177.03	30	1,897.93	365	3.93	1.41

Note: If you produce a report based on the 'Date Range' option you will have the ability to 'drill-down'. Drilling-down allows you to double click on any line of the report to view additional information.

From the first report screen you will see a total for each department or sub-department (depending on which option you chose), double clicking on the line of a particular department/sub-department will display totals for each individual product in that department/sub-department. You can drill-down further to view the particular product individually.

Using the 'Date Range' option, the report shows:

Filters	Definition
Department	This displays the 'Department' for all items within the report.
Product Name	This is the product description, and only populated when drilled down.
Quantity sold	This is the number of times this item was sold during the date period.
Total Sales (\$)	The total sales revenue for the item during the date period.
NHS value	The total NHS sales revenue for the item during the date period.
GST amount	The total GST for the item during the date period.
Gross profit (\$)	The gross profit as a dollar value for the item during the date period.
Gross profit (%)	The gross profit as a percentage for the item during the date period.
Stock value	This is the stock value for the item (calculated on real cost)
Stock on hand	This is the current stock on hand for this item.
Return \$/year	The return per year on this item in dollars. This is calculated by: (Total Sales / number of days in date range selected * 365) / Stock Value.
Return year	The return per year on this item as a percentage. This is calculated by (Qty / number of days in date range selected * 365) / SOH.

Department Report 06-Dec-2007 to 06-Jan-2009

CORUM HEALTH SERVICES
7 BUSINESS PARK DRIVE
NOTTING HILL
VIC 3168
Ph: 03 8541 6988
Fax: 03 8541 6989

Department	Product Name	Qty	Total Sales	NHS	GST	Gross Profit (\$)	G P%	Stock Value	SOH	Rt\$/yr	Rt/yr
2 PEAS IN APOD	2 PEAS CANDLE CUCUMB G'FRUIT PCT2CGF66	2	\$19.90	\$0.00	\$1.80	\$6.58	36	\$11.52	2	0.00	0.00
	2 PEAS HOME SPRAY 125ML	6	\$77.70	\$0.00	\$7.08	\$33.04	47	\$12.96	2	0.00	0.00
	2 PEAS LAUNDRY WASH 500ML	9	\$179.55	\$0.00	\$16.31	\$81.61	50	\$0.00	0	0.00	0.00
	2 PEAS LAUNDRY WASH SACHET	10	\$103.38	\$0.00	\$9.42	\$39.36	42	\$11.50	2	0.00	0.00
	2 PEAS LILAC LINEN WATER	2	\$29.00	\$0.00	\$2.64	\$10.96	42	\$7.70	1	0.00	0.00
	DISC 2 PEAS CANDLE CHAMOMILE PCT2CML65	1	\$9.95	\$0.00	\$0.90	\$3.29	36	\$0.00	0	0.00	0.00
	DISC 2 PEAS CANDLE LAVENDER PCT2LVR09	1	\$9.95	\$0.00	\$0.90	\$3.29	36	\$0.00	0	0.00	0.00
	DISC 2 PEAS CANDLE VERBENA PCT2VRB83	2	\$14.88	\$0.00	\$1.35	\$2.01	15	\$0.00	0	0.00	0.00
	DISC 2 PEAS EAU DE FIG 15ML	1	\$2.00	\$0.00	\$0.18	\$-5.88	-323	\$0.00	-1	0.00	0.00
	DISC2 PEAS CANDLE OLIVETREE PCT2OLT57	1	\$5.92	\$0.00	\$0.54	\$-0.38	-7	\$0.00	0	0.00	0.00
2 PEAS IN APOD		35	\$452.23	\$0.00	\$41.12	\$173.88	42	\$105.51	4	3.93	8.02
Totals for all products		206421	\$3,469,813.95	\$3.12	\$164,400.11	\$1,039,325.12	31	\$693,160.02	-484668	4.59	0.00

10.7 Unusual Stock Cards

An 'Unusual Cards Report' is designed to assist you in optimising your LOTS inventory system by eliminating cards that do not appear to be correctly set up. Therefore, these cards are known as having 'unusual' information.



Handy Hint!

It is recommended that you look at the 'Unusual Cards' report at least once a month as a minimum.

You should always try to minimise the amount of cards that appear in this report, and should run this report regularly to maximise the efficiency of the system.

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → Unusual cards.

2. Once entering into 'Unusual Cards' you will be prompted with the 'Unusual Faulty Card Report' filter (as shown in Figure 348).
3. 'Active Stock Only' will be ticked by default. If you wish to create the report for 'All Stock' simply untick this tick box.

4. 'Include Ethicals' will also be ticked by default, if you don't want ethicals included in this report, simply untick this option.

5. Once you have made your selection, select 'OK' to continue. A progress bar will be displayed that it is 'Finding Unusual Stock Cards' (as shown in Figure 349). This may take a few minutes to complete.

6. The 'Unusual or Faulty Cards' screen will be displayed listing the amount of unusual or faulty cards in your LOTS system (as shown in Figure 350).

Note: The 'Total number of Stock cards' displays the actual amount of stock cards contained within your stock file. The 'Stock cards with Drug information' indicates the total number of stock cards that contain the 'Drug information' tab that allows you to dispense these drugs.

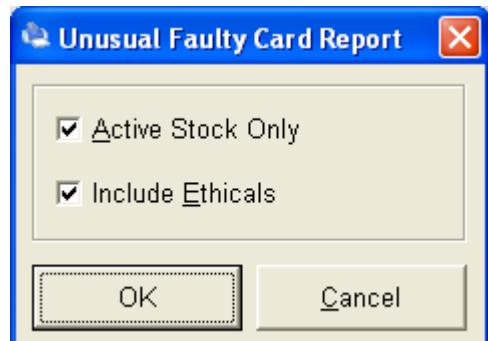


Figure 348

Finding Unusual Stock Cards. Please wait...

82%

Figure 349

Problem	No. Cards
Unusual Packsize	0
Unusual Stock On Hand	137
Unusual Minimum Stock On Hand	0
Retail price of zero or less	53
Retail price of \$500 or more	10
List Cost of zero or less	43
Real Cost of zero or less	406
Both Cost and retail of zero	30
List cost greater than Retail	14
Real cost greater than Retail	22
Markup of less than 5%	7
Unusual MTD sales	0

Total number of Stockcards: 22,943
Stockcards with Drug information: 5,432

Details... Exit

Figure 350

7. Highlight the problem you wish to view and

- select '**Details**' or double click.
8. Selecting '**Details**' will display the problem window (see Figure 351).
 9. From this screen you will only be able to print out the report. You will not be able to make changes or view the stock cards from here.
 10. Select the '**Print**' button to print out the report.

Retail price of zero or less

PLU	Trade Name	Retail
695809	ABILIFY 10MG T	\$0.00
695817	ABILIFY 15MG T	\$0.00
695833	ABILIFY 30MG T	\$0.00
716340	ACCUCHECK GO 50	\$0.00
797159	ACCUCHECK PERFORMA 50	\$0.00
630368	ACCURETIC 20/12.5MG T	\$0.00
774869	ACLOR SUSP 125MG/5ML 100ML	\$0.00
774877	ACLOR SUSP 250MG/5ML 75ML	\$0.00
784736	ACQUIN 5MG T	\$0.00
784751	ACQUIN 20MG T	\$0.00
764761	ACTONEL COMBI 4/24 T	\$0.00
827931	ACTONEL COMBI D 4/24 T	\$0.00
640425	ACTONEL ONCE-A-WEEK 35MG T	\$0.00
607291	ACTOS 15MG T	\$0.00

Print **OK**

Figure 351

10.8 Item Sales Report

The purpose of the Item Sales Report is to show the sales performance of stock items in the store for a selected date range.

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Item Sales Report.
2. The Item Sales Report window is displayed (as shown in Figure 352).
3. The 'Start Date' defaults to one month prior to the end date. While the 'End Date' defaults to the current date, but you can choose any date range you like.
4. Once you have selected your 'date range' choose a time range.
5. Time can be selected at 15 minute intervals.
6. There are six filter options:

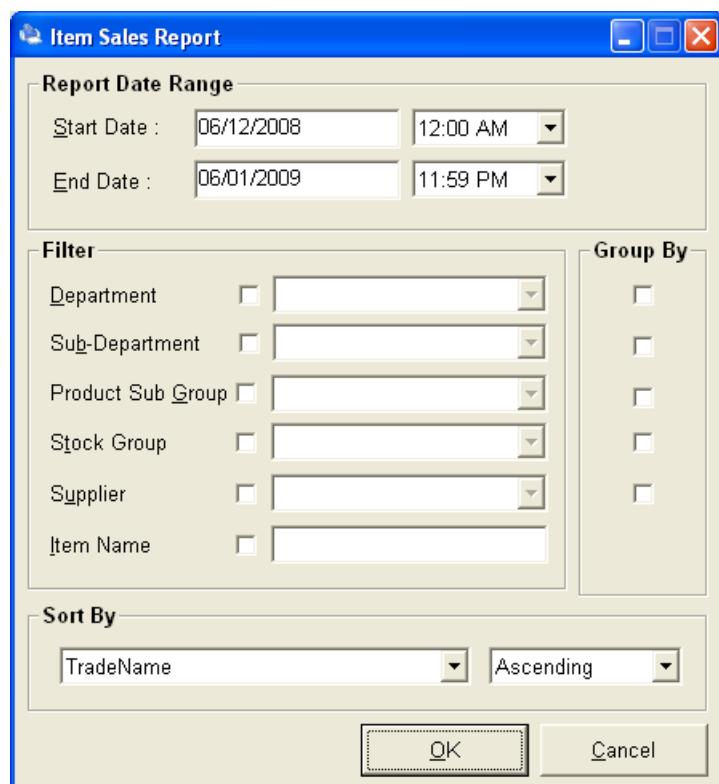


Figure 352

Filters	Definition
<u>Department</u>	This allows you to select one of your departments from the drop-down menu.
<u>Sub-Department</u>	This allows you to select one of your sub-departments from the drop-down menu.
<u>Product Sub Group</u>	This allows you to select one of your product sub groups from the drop-down menu.
<u>Stock Group</u>	This allows you to select one of your stock groups from the drop-down menu.
<u>Supplier</u>	This allows you to select one of your suppliers from the drop-down menu.
<u>Item Name</u>	This allows you to type in an item name (or part of an item name) to search for.

7. After you have selected your filter choose how you wish the report to be sorted by as well as the order:
 - Trade Name
 - Unit Sales
 - Profit
 - COGS
 - SOH

8. You can also choose 'Group By' options. The Group By option allows you to have your report grouped into certain sections, for example by Department, allowing you to compare different departments against each other. You can also choose to group by two or more options for example Department → Sub-Department, every item will be grouped by Sub-Department then every Sub-Department grouped by Department.

9. Select 'OK' to generate the report.

Item Sales Report											
CORUM HEALTH SERVICES 7 BUSINESS PARK DRIVE NOTTING HILL VIC 3168 Ph: 03 8541 6988 Fax: 03 8541 6989		Reporting by: Baby									
		Grouped by:									
		Report Period : 6/12/2007 12:00:00AM to 6/01/2008 11:59:00PM									
		PLU	Trade Name	Retail	Avg. Cost	SOH	Sales	COGS	Units Sold	Govt. Recv	\$ Profit
Baby											
790882	AD JOINTED TOY HORSE COWB	39.95	18.54	0	36.32	18.54	1.00	0.00	17.78	49.0	
716548	AMC BABY BOTTLE 250ML	6.95	3.71	3	12.64	7.42	2.00	0.00	5.22	41.3	
974234	AMC BABY POWDER 375G	3.50	2.00	1	2.01	2.00	1.00	0.00	0.01	0.5	
965340	AMC INFNT FORMULA 980 0 6	13.45	10.68	0	13.45	10.68	1.00	0.00	2.77	20.6	
976377	AMC MOTHER BE NURSING P	9.95	6.70	3	9.05	6.78	1.00	0.00	2.27	25.1	
988886	AMC NAPPY RASH CREAM 10	4.95	3.05	5	13.60	8.65	3.00	0.00	4.95	36.7	
581330	AMC THICK WIPE PK100	5.60	2.88	12	4.73	7.26	2.00	0.00	-2.63	-53.5	
975899	AMC ZINC CASTOR OIL CREAM	5.45	3.42	11	0.00	2.36	1.00	0.00	-2.36	0.0	
771272	AMEDA PURELY YOURS BREA	310.00	195.71	1	281.82	195.71	1.00	0.00	86.11	30.6	
705039	AMOLIN BABY CRM 100G	8.55	5.42	5	23.32	15.96	3.00	0.00	7.36	31.6	
741213	AMOLIN BABY CRM 50G	6.00	3.90	5	10.90	7.50	2.00	0.00	3.40	31.2	
901475	AROMABABY AROMAWIPES 30	8.95	5.30	3	7.23	5.42	1.00	0.00	1.81	25.0	

Columns	Definition
PLU	This is the item's PLU Number.
Trade Name	This is the item's trading name.
Retail	This is the retail cost of the item.
Average Cost	This is the average cost of the item.
SOH	This is the item's current stock on hand.
Sales	This is total sales within the reporting period.
COGS	This is the cost of goods sold.
Units Sold	This is the number of items sold during the period.
Government Recovery	This is the government recovery received for the sales of the item.
\$ Profit	This is the profit made on the sales of the item (in dollars).
% Profit	This is the profit made on the sales of the item (as a percentage).
Seasonal	This will apply a tick if the item is marked as seasonal or not.

10.9 Stock Adjustment Report

The Stock Adjustment Report allows you to produce a report that will show you all stock adjustments made over a period of time.

Note: For best results ensure the option 'Reason Prompt for SOH Adjustments is turned on (LOTS Start Menu → Tools → Options → POS Options).

1. Navigate from the LOTS Start Menu → Reports → Stock Reports → Stock Adjustment Report.
2. This will display the 'Stock Adjustment Report' window (see Figure 353).
3. Firstly you must select the 'Date Selection', either:
 - **Stock Adjustments Since Last Report** – This will produce a report based on all adjustments since the last time you generated a stock adjustment report.
 - **Date Range** – Select a date period to generate a stock adjustment report for.
4. Then select filters if you wish to refine your search, and select another 'Sort By' option if you wish to sort by something other than date range.
5. When complete select '**OK**' to generate the report.

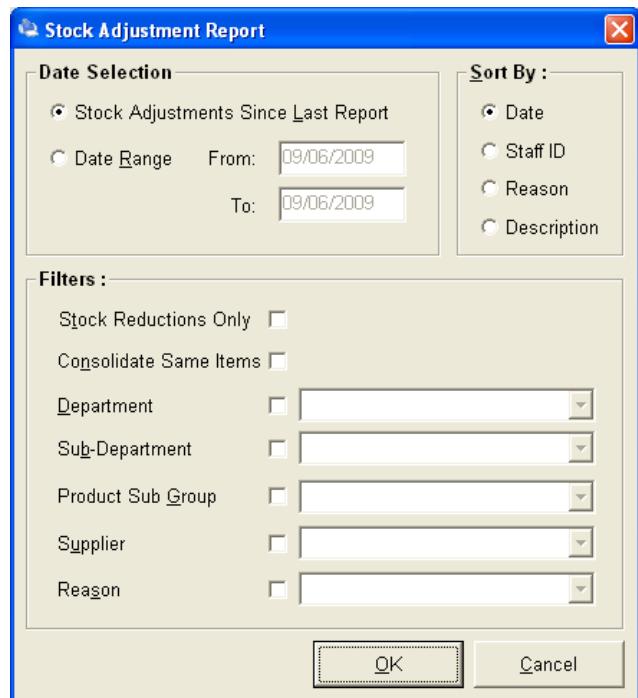


Figure 353

Stock Adjustment Report 01/06/2007 to 09/06/2007

Corum Health Services
7 BUSINESS PARK DRIVE
NOTTING HILL
VIC 3168

Date	Staff ID	Item	Cost	Stock Adj	Adj Value	Reason
01/06/2007	08	OPTI FREE REPLENISH 300ML	\$8.67	-1	-\$8.67	Out of Date
01/06/2007	08	ULTRAZYME REMOVER TAB 10	\$13.85	-2	-\$27.70	Out of Date
01/06/2007	08	EAR CLEAR DRY & CLEAR 40ML	\$5.51	-1	-\$5.51	Out of Date
01/06/2007	08	VISINE TRUE TEARS EYE DROP 15ML	\$8.85	-2	-\$7.70	Out of Date
01/06/2007	08	MURINE REVITAL EYES	\$5.84	-1	-\$5.84	Out of Date
01/06/2007	08	B&L S/EYE DAILY CLEANER 30ML	\$14.89	-2	-\$29.78	Out of Date
01/06/2007	08	LOMIDE 0.1% EYE DROPS 10ML	\$5.70	-1	-\$5.70	Out of Date
01/06/2007	08	NIZORAL SHAMPOO 1% 100ML	\$8.53	-2	-\$17.06	Out of Date
01/06/2007	08	HEAD & SHLD COND RMENTH 200ML	\$4.15	-4	-\$16.60	Out of Date
01/06/2007	08	KP24 LICE SPRAY 50ML	\$7.86	-1	-\$7.86	Out of Date
01/06/2007	08	BIOG SELECT FISH OIL 400	\$17.01	1	\$17.01	Count

Columns	Definition
Date	This is the date of the stock adjustment.
Staff ID	This is the ID of the staff member who made the stock adjustment.
Item	This is the item's description.
Cost	This is the unit cost of the item based on Real Cost.
Stock Adjustment	This is the number of items adjusted. This can be a positive or negative number depending on a stock increase or stock reduction respectively.
Adjustment Value	This is the stock adjustment value for the item. This is calculated by multiplying the 'Cost' by the 'Stock Adjustment'.
Reason	This is the reason for the stock adjustment.

10.10 Staff/Time Analysis

The Staff/Time Analysis Report allows you to produce a report that will show you either sales by hour or staff sales.

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Staff/Time Analysis.
2. This will display the 'Hourly Sales' window (see Figure 354).
3. Firstly, select the date range you wish to report on.
4. Then select the report type. become active:
 - **Sale by Hour** – If you tick this option then the total sales each hour the store has been open will be shown.
 - **Staff Sales** – If you tick this option then the sales made by each customer will be shown.
5. When you select the 'Staff Sales' Report type, two new options become active:
 - **Include Scripts Sold** – If you wish to include script sales then ensure this option is ticked (ticked by default).
 - **Sort by** – You can now choose how you wish the report to be sorted. This option allows you to select one of seven fields to sort by as well as allowing the report to be sorted in 'Ascending' or 'Descending' order. The default is 'Staff Name' and 'Ascending' (as shown in Figure 354).
6. If you wish to include a graph to the report select 'Include Graphs' and once ticked, select either:
 - Bar Graph
 - Line Graph
6. When complete select 'OK' to generate the report.

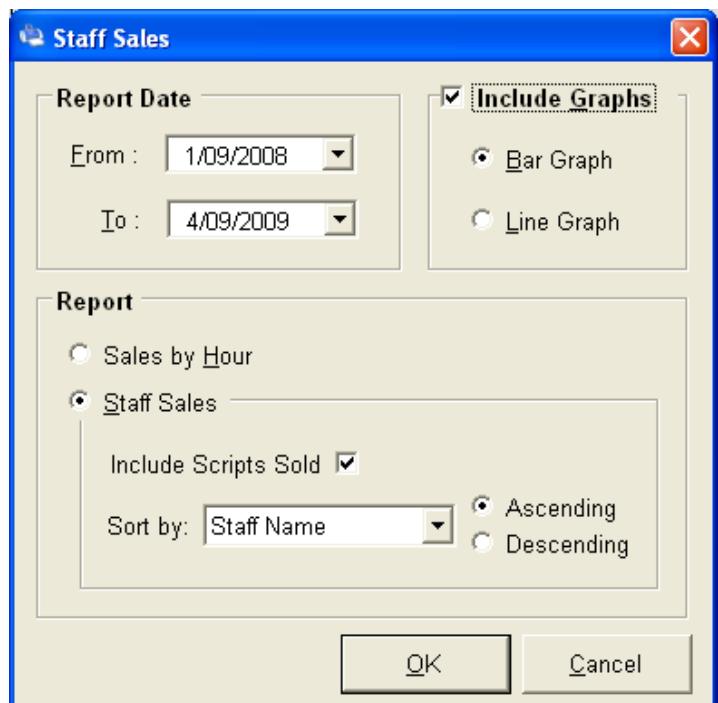


Figure 354

Average Hourly Sales Figures

01-06-2007 to 10-06-2007

Corum Health Services
7 BUSINESSPARK DRIVE
NOTTING HILLVIC 3168

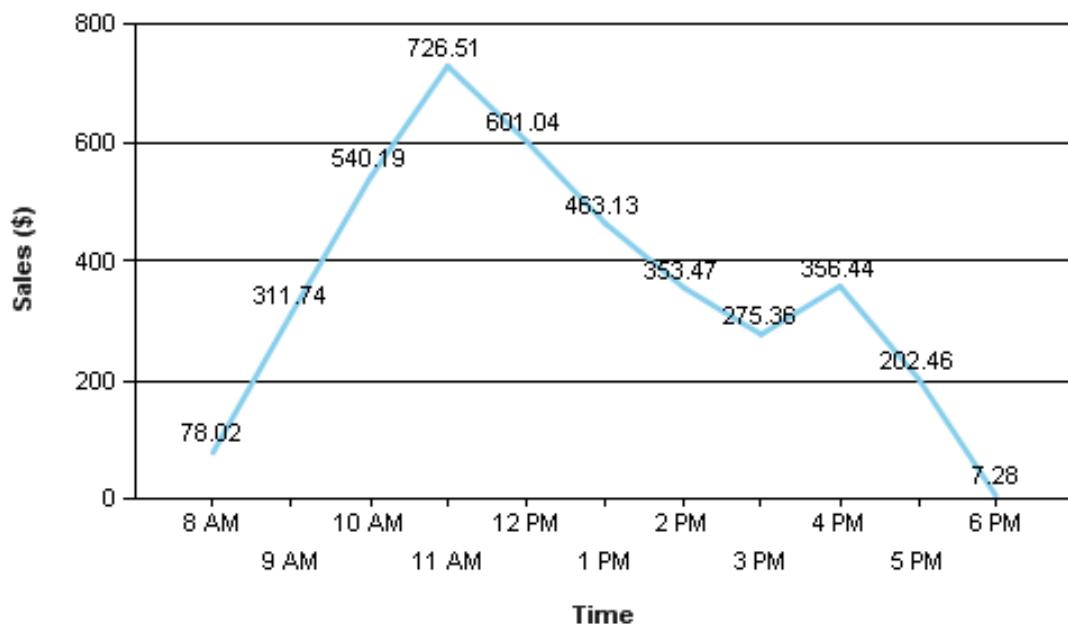
Time	Customers	Items	Sales (Ex. GST)	GST	Avg. Sale	Items / Sale
8 AM	3	7	\$78.02	\$3.47	\$26.01	2.23
9 AM	15	33	\$311.74	\$13.85	\$21.35	2.29
10 AM	21	56	\$540.19	\$25.15	\$25.85	2.68
11 AM	24	66	\$726.51	\$34.61	\$30.53	2.79
12 PM	22	57	\$601.04	\$22.45	\$27.20	2.60
1 PM	19	50	\$463.13	\$15.92	\$24.63	2.66
2 PM	13	38	\$353.47	\$13.79	\$26.58	2.84
3 PM	12	30	\$275.36	\$9.53	\$23.14	2.53
4 PM	13	42	\$356.44	\$17.86	\$27.00	3.15
5 PM	7	15	\$202.46	\$11.49	\$31.15	2.32
6 PM	0	0	\$7.28	\$0.73	\$72.82	3.00
Total	148	395	\$3,915.64	\$168.85	\$26.42	2.66

Average Hourly Sales Figures

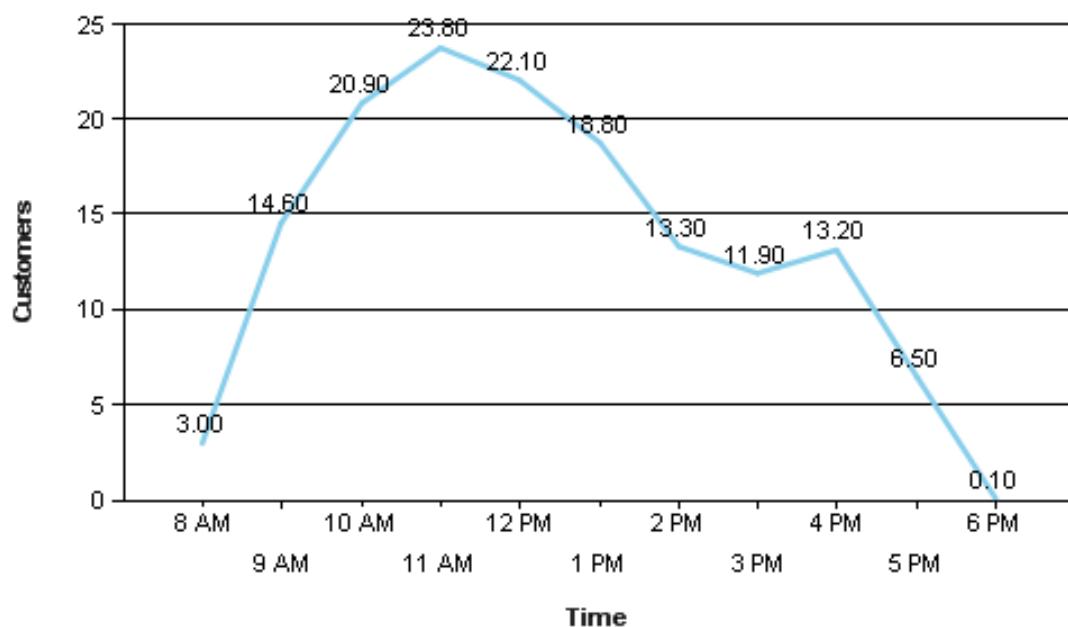
01-06-2007 to 10-06-2007

Corum Health Services
7 BUSINESS PARK DRIVE
NOTTING HILL VIC 3168

Sales Per Hour



Customers Per Hour



Individual Staff Sales Figures

01-06-2007 to 10-06-2007

Corum Health Services
7 BUSINESS PARK DRME
NOTTING HILL VIC 3168

Staff Name	Customers	Items	Sales (Ex. GST)	GST	Avg. Sale	Items /Sale
Anne	32	71	\$926.12	\$35.30	\$28.94	2.22
Ben	7	19	\$152.26	\$5.01	\$21.75	2.71
Betty	122	368	\$3,542.55	\$165.19	\$29.04	3.02
Bonnie	147	361	\$3,796.10	\$156.12	\$25.82	2.46
Daniel	190	603	\$5,444.57	\$252.52	\$28.66	3.17
David	14	10	\$63.82	\$0.49	\$4.56	0.71
Jessica	210	601	\$6,006.05	\$216.82	\$28.60	2.86
Kerrie	280	650	\$6,432.39	\$271.30	\$22.97	2.32
Leah	1	10	\$48.52	\$0.00	\$48.52	10.00
Lisa	66	198	\$1,779.10	\$66.93	\$26.96	3.00
Michelle	3	5	\$382.61	\$17.08	\$127.54	1.67
Rina	85	225	\$2,074.62	\$84.16	\$24.41	2.65
Rose	158	422	\$4,092.84	\$162.93	\$25.90	2.67
Ryan	119	311	\$3,078.20	\$180.43	\$25.87	2.61
Sarah	12	19	\$194.19	\$2.08	\$16.18	1.58
Steve	1	1	\$96.22	\$9.62	\$96.22	1.00
Tim	35	75	\$1,046.19	\$62.53	\$29.89	2.14
Total	1,482	3,949	\$39,156.35	\$1,688.51	\$26.42	2.66

Individual Staff Sales Figures

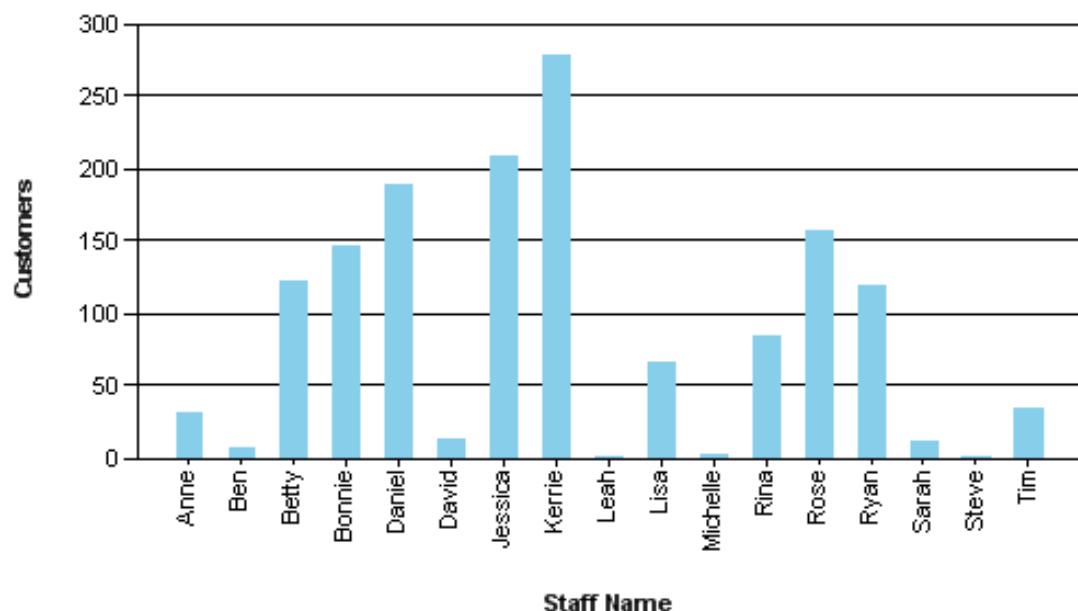
01-06-2007 to 10-06-2007

Corum Health Services
7 BUSINESS PARK DRME
NOTTING HILL VIC 3168

Sales Per Staff Member



Customers Per Staff Member



10.11 Bank Reconciliation Report

The Bank Reconciliation Report will display how each payment was made (cash, cheque, EFTPOS etc) for either a date period or selected EOD.

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Bank Recon. Report.
2. This will display the 'LOTS Report Engine' window (see Figure 355).
3. Select either a date range or an 'End Of Day' period.
4. Then select the 'Level of Detail' you wish to show, either:
 - **For each End Of Day** – This will show the results by End Of Day. This option is commonly used for date ranges that span several End Of Days.
 - **For each Sale** – This will display each sale individually.

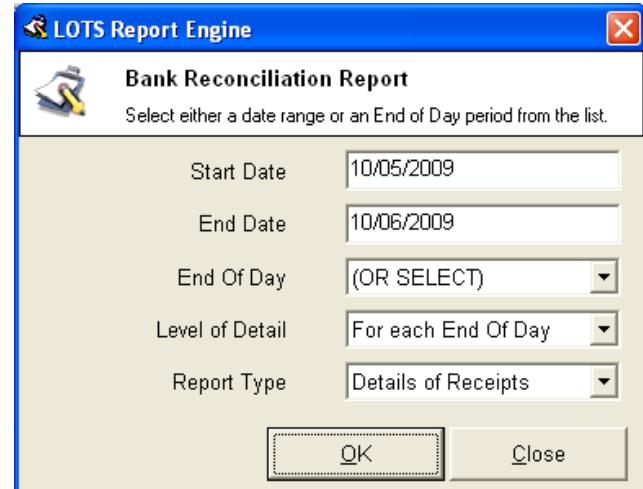


Figure 3505

5. Finally select the report type you want displayed: either:
 - **Details of Receipts** – This will show you how payment was made for each transaction (e.g. Cash, Cheque, EFTPOS etc).
 - **Summary of Receipts** – This will display whether the transaction was a non-account, account or agency sale.
6. When complete select 'OK' to generate the report.

Bank Reconciliation Report : Details of Receipts										Date From:	11/05/2007		
For each End Of Day										Date To:	11/06/2007		
Details of Receipts													
Integrated EFT										Manual EFT	Total		
Number	EOD Date	Time	Cash & Cheque	Other	Debit	Visa	Mastercard	Bankcard	Sub-Total (EFTPOS Service Provider)	Amex	Diners	Other CC	Total EFT
1137	11/05/2007	17:26	3,954.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,227.17
1138	12/05/2007	12:20	1,216.65	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,241.98
1139	13/05/2007	11:35	103.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	337.31
1140	14/05/2007	17:19	2,234.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,976.39
1141	15/05/2007	17:27	1,956.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,991.01
1142	16/05/2007	17:16	2,627.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,327.17
1143	17/05/2007	17:26	2,675.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,044.60
1144	18/05/2007	17:17	2,719.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,150.90
1145	19/05/2007	12:07	898.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,150.45
1146	20/05/2007	11:45	418.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	892.78
1147	21/05/2007	17:23	2,723.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,928.51
1148	22/05/2007	17:19	2,428.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,715.13
1149	23/05/2007	17:23	2,438.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,564.54
1150	24/05/2007	17:21	2,746.75	42.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,921.22
1151	25/05/2007	17:16	3,253.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,905.45
1152	26/05/2007	12:28	1,328.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,138.77
1153	27/05/2007	11:49	526.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	91.09
1154	27/05/2007	11:58	79.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	152.18
1155	28/05/2007	17:19	2,659.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,528.04
1156	29/05/2007	17:14	2,272.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,097.86
1157	30/05/2007	17:15	4,592.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,003.28
1158	31/05/2007	17:11	2,505.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,776.15
1159	01/06/2007	17:19	3,182.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,505.08
1160	02/06/2007	12:08	484.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,157.56
1161	03/06/2007	12:01	508.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	464.75
1162	04/06/2007	17:25	2,435.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,568.28
1163	05/06/2007	17:13	3,170.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,856.02
1164	06/06/2007	17:03	2,196.85	31.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,875.77
1165	07/06/2007	17:20	3,522.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,665.75
1166	08/06/2007	17:11	3,135.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,680.97
1167	09/06/2007	12:31	964.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,014.81
1168	10/06/2007	12:06	565.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	863.58

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10.12 Multi-Buy Report

The Multi-Buy Report (also reports on Bonus-Buys) will generate a report based on all Multi-Buy/Bonus-Buy sales. You can choose to report by date range or by Multi-Buy/Bonus-Buy name.

1. Navigate from the LOTS Start Menu → Reports → Sales Reports → Multi-Buy Report.

2. This will display the 'Multi-Buy Report' window (see Figure 356).

3. Choose how you wish to report buy, either:

- **All Current Multi-Buys** – This will produce a report on current Multi-Buys/Bonus-Buys.
- **Selected Multi-Buy** – This will allow you to produce a report on any Multi-Buy/Bonus-Buy. Select the name of the Multi-Buy/Bonus-Buy you want to report on and both the 'Multi-Buy Start Date' and 'Multi-Buy Finish Date' will be automatically populated.

4. The final option 'Level Of Detail' allows you to select whether you want the report filtered by product (Group By Product), or buy each individual sale (Sale By Sale).

5. When complete select 'OK' to generate the report.

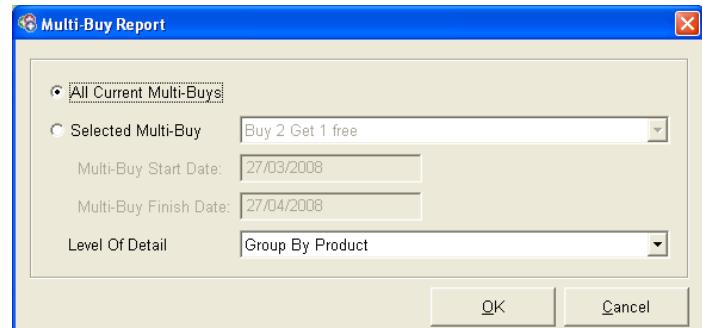


Figure 356

Multi-Buy Sales Report										
Report by : Selected Multi-Buys Report Mode : Sale by Sale										
Corum Health Services 7 BUSINESS PARK DRIVE NOTTING HILL VIC 3168 Ph: 8541 6998 Fax: 8541 6999										
Bonus-Buy Buy one Get One Free									"Free Loreal Shampoo with each condition"	
Active Period : 01/Feb/2008 to 01/Apr/2008										
Receipt Number	Sale Date & Time	PLU	Trade Name	Sale Type	Retail	Units Sold	Sales Ex. GST	COGS	\$ Profit	% Profit
544669	15/02/2008 04:10:27PM	651547	LOREAL D/E V/RES CLNSR 20	Bonus	\$14.35	1	0.00	8.80	-\$8.80	0.00 %
544669	15/02/2008 04:10:27PM	703991	LOREAL D/E R/NOURISH WIP	Trigger	\$10.25	1	9.32	5.09	\$4.23	45.39 %
						2	\$9.32	\$13.89	-\$4.57	-49.03 %
Bonus-Buy Summary										
						Units Sold	Sales Ex. GST	COGS	\$ Profit	% Profit
						Bonus Sales	\$0.00	\$8.80	-\$8.80	0.00 %
						Trigger Sales	\$9.32	\$5.09	\$4.23	45.39 %
						Total Sales	\$9.32	\$13.89	-\$4.57	-49.03 %
Printed :11/06/2009 11:13 am										
Page 1 of 1										

10.13 Business Activity Report

The Business Activity Report basically shows all your GST data for any particular date range.

Note: LOTS automatically collects GST on sales data. In order to collect GST on purchases you need to have the Orders option 'Delivered Order to Creditors File' turned on.

1. Navigate from the LOTS Start Menu → Reports → GST Reports → Business Activity.
2. This will display the 'GST Business Activity Report' window (see Figure 357).
3. The first option to choose is your report type, either:
 - **Summary Report** – The summary report (shown below) will not allow you to select any of the 'Report by' filters and only displays GST totals.
 - **Full Report** – the full report allows you to filter by Department (default), Sub-department or Individual Items. The report will then display each sub-total for the filter you have selected along with a final total
4. Once you have selected your 'Report Type' (and Report By filters if applicable), you must select a 'Reporting Period'.
5. When complete select '**OK**' to generate the report.



Figure 357

Summary Business Activity Report for the period 01/01/2009 to 13/08/2009

Corum Health Services
7 BUSINESS PARK DRIVE
NOTTING HILL
VIC 3168
Ph: 8541 6988
Fax: 8541 6989

Description	Amount
Total GST From Sales	\$8,817.28
Total GST from Purchases	\$28,731.44
Total GST From Other Items	
Net GST Credit	\$19,914.16
Total Value of GST Free Sales	\$167,180.09

10.14 View Audit Trail

The audit trail allows you to browse dispensary and POS transactions one-by-one. The view also include a power find functions (binocular icon) allowing you to search for a specific transaction type. The audit trails are re-set each time you perform a daily backup from within LOTS

1. Navigate from the LOTS Start Menu → Reports → Other Report → View Audit Trail.
2. This will display the 'Audit Trails' window (see Figure 358).
3. There are two options to choose from:
 - **View Dispensing Audit Trail Files** – This option will list the current dispensing audit trial file. By double clicking on the file (or highlighting the file and selecting 'View File') it will display every dispensary action that occurred since the last dispensing audit trial file.
 - **View POS Audit Trail Files** – This option will list the current POS audit trial file. By double clicking on the file (or highlighting the file and selecting 'View File') it will display every POS action that occurred since the last POS audit trial file.

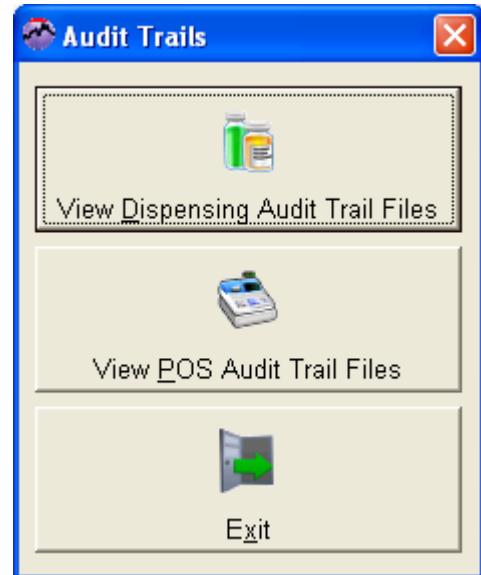


Figure 358

4. The audit trials are identical in layout, one just records Dispensary actions while the other records POS actions. They both have five columns (see POS report below):
 - **Action** – This might be 'New Script' or 'New Sale'.
 - **Date & Time** – The exact date and time the action occurred.
 - **Staff Name** – This is the name of the staff member who performed the action.
 - **Computer** – This is the name of the computer that the action was performed on.
 - **Information** - This provides more information about the action. For the action of 'New script' it would list the Drug being dispensed and Patient, and for the action 'New Sale' it would list the item being sold and the cost/tender type.

Audit trail listing - Point of Sale: POSAUDIT.LOG				
Action	Date & Time	Staff Name	Computer	Information
New Sale 544782	14/05/2009 11:35:43 AM	Corum Health	VICWKS006	BEROCCA PERFORM ORAN EFF TAB45 PANACHE TALC 200GM ACCOUNT \$149.55
New Sale 544781	14/05/2009 11:33:50 AM	Corum Health	VICWKS006	BEROCCA ORIG EFF T 15 POCKET FILE BANANA L/BLUE 1947 ACCOUNT \$40.54
New Sale 544780	14/05/2009 11:32:45 AM	Corum Health	VICWKS006	BR GILL SENSOR EXCEL G/P BEROCCA ORIG EFF T 15 ACCOUNT \$18.54
New Sale 544779	14/05/2009 11:30:45 AM	Corum Health	VICWKS006	BEROCCA ORIG EFF T 15 ACCOUNT \$0.00
New Sale 544778	13/05/2009 1:53:26 PM	Corum Health	VICWKS006	LAY-BY PAYMENT RECEIVED CASH \$30.00
New Sale 544777	13/05/2009 1:51:44 PM	Corum Health	VICWKS006	BEROCCA ORIG EFF T 15

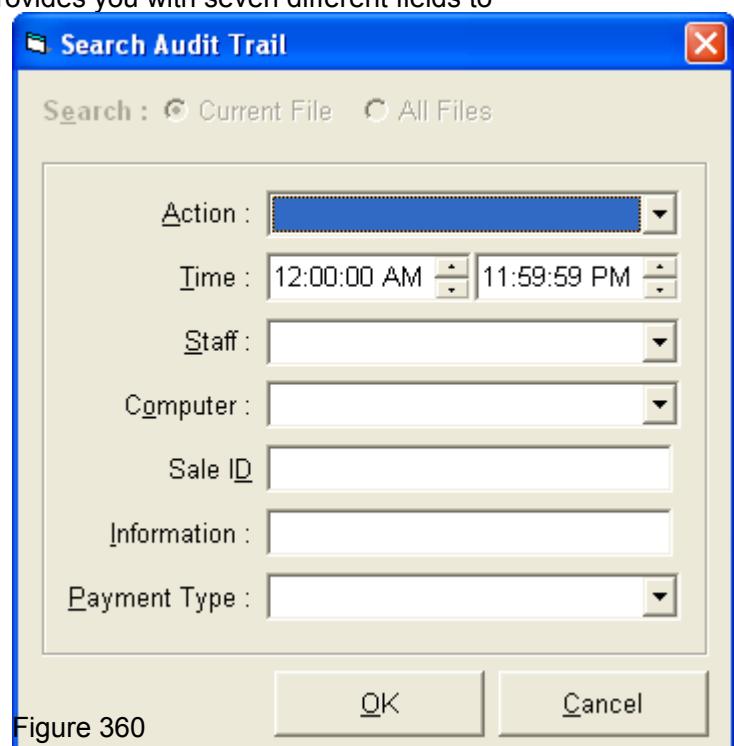
10.14.1 Search Audit Trail

As the audit trail may be quite long you can search function to find specific instances.

1. To search for a specific audit trail instance, click on the binocular icon in the top right corner of the Audit trail window (see Figure 359).
2. Clicking the binocular icon will display the 'Search Audit Trail' window (see Figure 360).
3. The 'Search Audit Trail' window provides you with seven different fields to search by, they are:

- **Action** – This allows you to search specifically for either:
 - New Sale
 - Abandoned Sale
 - Price Change
 - Perm. Price Change
 - Line Wiped
 - Lay-By Payment
- **Time** – This allows you to search for the instance by time range.
- **Staff** – This allows you to search for the instance by staff member.
- **Computer** – This allows you to search for the instance by computer (e.g. – Till 01, Master).
- **Sale ID (POS Audit Trail Only)** - This allows you to search for the instance by the sale ID number.
- **Information** – This allows you to search for the instance by information.
- **Payment Type (POS Audit Trail Only)** - This allows you to search for the instance by payment type (e.g. EFTPOS, CASH, CHEQUE etc).

4. Once you have set your search options select 'OK' to view the results. To revert back to the full Audit Trail use the binocular drop-down arrow and select 'Show All Items'.



11 Clubs

LOTS offers many additional features that take Point of Sale beyond simple sales and stock control. LOTS Clubs is a powerful marketing tool that can greatly enhance the profits and margins in any business. A customer loyalty club is a marketing feature within LOTS.

Clubs are a very powerful means of marketing for a pharmacy. Invitations to 'club member only' special showings of new ranges that they use, with a free gift, can bring in up to 75% of the people mailed. A cosmetic-oriented pharmacy can increase its turnover by 15% from using clubs enthusiastically.

11.1 Before Creating A Club

Before you set up a Loyalty Club you must have a clear plan of your objectives.

- What products are to be included in the club?
- Will I issue a gift, a voucher or provide a discount?
- What will be the trigger for a discount, gift or voucher redemption?
- What conditions will apply to the club?
- Are all my staff familiar with the club's objectives and procedures?

Throughout this section examples of different types of clubs are provided.

Targets can be set for each club, with a message appearing when the target is reached, allowing for a gift, or gift voucher to be supplied and recorded. Targets can be set on the sales value or quantity of goods sold.

Issuing of gifts is one of the more important aspects of clubs. There are two aspects to issuing gifts for clubs members:

- What type of gifts will be issued.
- Recording gifts issued.

11.2 Gifts To Be Issued

The effectiveness and longevity of the customer club will be greatly affected by the type of benefits a customer will receive for being a member. Once a club has been established changing its conditions and "reward system" can reduce the customer's faith and thus loyalty in the club. Thus the planning and conditions of a club must be clearly laid out before it is established.

Traditionally a lot of clubs have been established on the basis of rewarding club members with a discount on their purchase. This method is the least desirable and can often produce negative effects instead of the positive effects originally intended when first established.

Keep the following in mind when establishing a new club:

- "What will you do when you are tired of giving away money?"
- "Once a customer receives a benefit they will always expect that benefit"
- "What incentive is there for the customer to return to your shop?"
- "Giving out lots of vouchers does not mean a large number will be returned."

Giving a discount is the least desirable method for rewarding club members as it only reduces gross profit and forces you to compete on price. Competing on price only provides short-term benefits until local competitors reduce their prices. Giving discount at the time of sale provides no incentive for the customer to return to your shop.

Other methods for rewarding club customers for their loyalty include "gifts" and vouchers.

Vouchers are the most popular method for rewarding club customers probably because a voucher method is easier to implement though this method does not necessarily obtain the best result.

Future purchase vouchers are better because:

- It brings them back into the shop, exposing them to your merchandise again, or offers the opportunity to start building towards their next total.
- You get the "warm fuzzy" goodwill benefits twice - once when they receive the voucher, and once when they cash it in.
- A percentage of vouchers will not be cashed in, allowing you to be more generous than an "on the spot" gift or discount.
- A printed, professionally produced voucher is well worth the investment.

A gift method is a common alterative to the issuing of vouchers. The type of gifts can vary dramatically depending on the type of club that has been established.

Gifts are better because:

- The perceived retail value is more than the real cost of the gift.
- Old stock can be cleared out (Worst 50 Items report).
- Your suppliers, e.g. free lipstick, can often supply special club bonus stock.

11.3 Recording Gifts Issued

When the club member reaches the target, you may have decided to give a free gift, discount or discount voucher. If you investigate how large retailers use this type of incentive, you will notice that the incentive used most often is a voucher, which goes towards their next purchase. Discounts are not advisable, since once a discount is given, the customer expects it to be permanent, and it also prevents further incentives.

A stock card such as "FREE GIFT", "GIFT VOUCHER \$10.00", "GIFT VOUCHER", "FREE ENLARGEMENT" etc. needs to be set up to be recorded when the target is reached during a sale.

11.4 Create A Loyalty Club

1. Navigate from the LOTS Start Menu → Clubs.
2. This will display the 'Clubs – Triggers' window.
3. To setup a new club, type the name into the Club field.
4. After typing in the name of your club select 'Enter'.
5. If the club name you enter does not already exist you will be prompted to create the new club (see Figure 300). Select 'Yes' to create the new club.

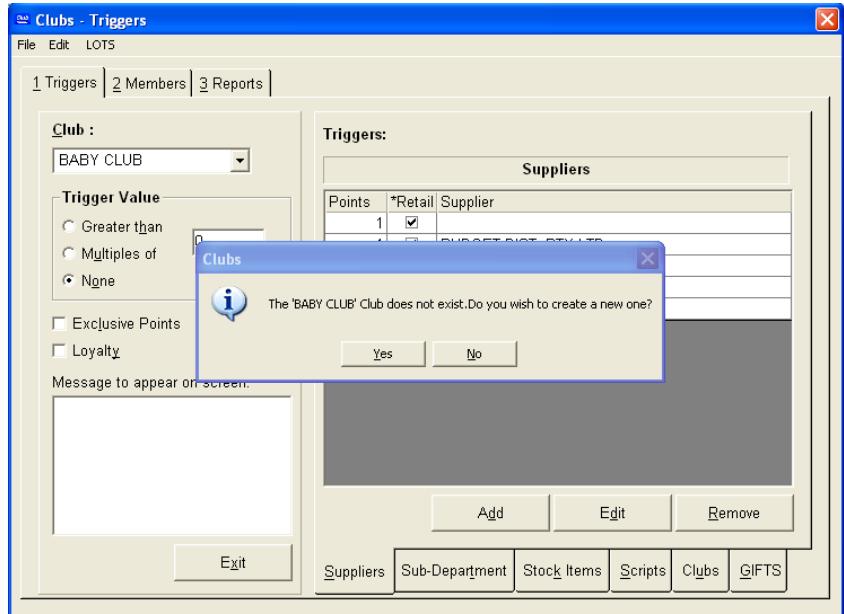


Figure 361

6. As an example, for baby club you may wish to set the whole of the 'Baby' product group (sub-department) as the trigger. Alternatively, you may wish to set certain baby products.
7. Select your trigger type (Figure 362):

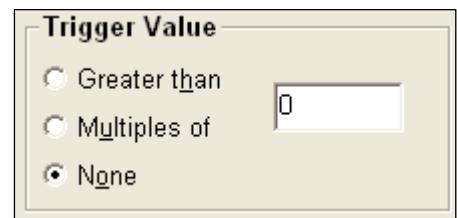


Figure 362

Trigger Value	Definition
Greater than	The 'Greater than' option is where you can nominate different gift triggers, for example with 200 points you might be able to get a free perfumed soap, with 300 points a body lotion and with 1000 points a bottle of perfume, etc. So basically the more points that you have, the better your gift is.
Multiples of	The 'Multiples of' option is where you can nominate different gift triggers, for example with 200 points you might be able to get a free perfumed soap, with 300 points a body lotion and with 1000 points a bottle of perfume, etc. So basically the more points that you have, the better your gift is.
None	The 'None' option is selected when you don't have a trigger for your club, but you want to record the club member sales. This could be used by Friendly Society groups that offer memberships with member discounts upon presentation of a member card.

11.5 Triggers

Products can be setup as a club trigger individually or in bulk via Supplier, Sub-Department, or any combination or multiple of these.

11.5.1 Suppliers

1. Select the 'Suppliers' tab along the bottom of the Club window (see Figure 363).
2. To add a Supplier select the 'Add' button.
3. This will display the 'Select Supplier' drop-down list (see Figure 364), select the supplier followed by 'OK'.
4. Every product within this supplier will now be a trigger for a club sale.
5. If the 'Point Value' is set to 1 and the 'Points Related to retail (Points x retail)' option is ticked (Figure 365) then the system will equate \$1.00 to equal 1 point, enabling you to track club members' total spending.

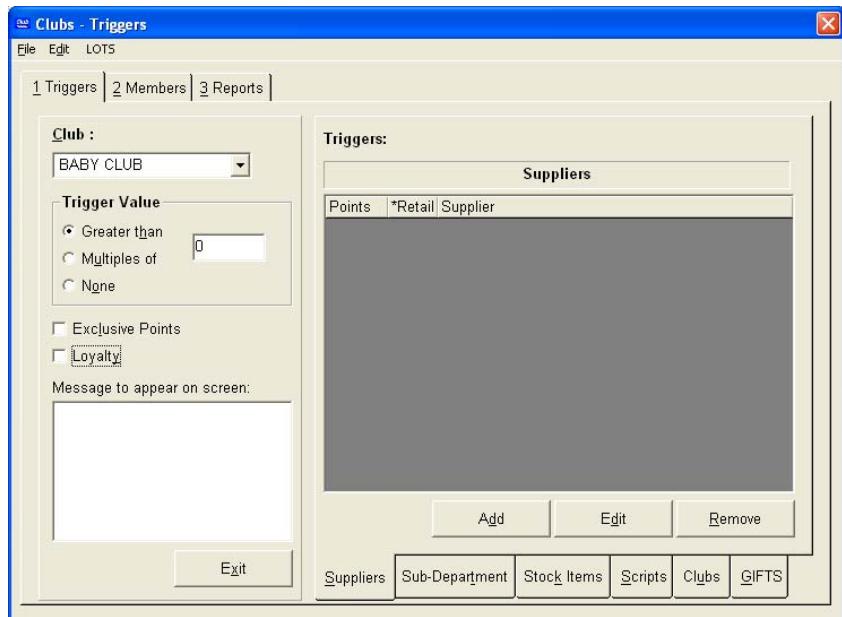


Figure 363

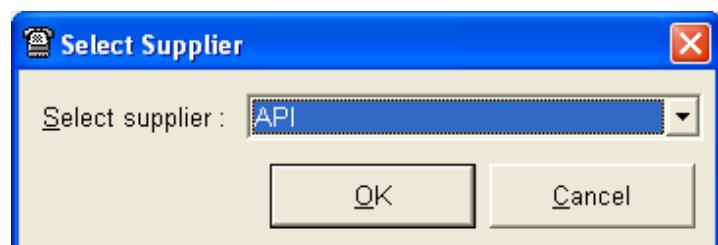


Figure 364



Figure 365

- Note:** In some cases you must wish to give additional points to people who purchase products from specific supplier (e.g. Arrow). In situations like this you could change the 'Point Value' field to 5.
7. We suggest that you leave '% Discount on Sale' at zero (0) unless your club type is a discount club.
 8. Press OK to save.

9. You can continue to add additional suppliers to the list by selecting the 'Add' button again.
10. When adding any trigger to a club you will notice the option called 'Exclude this item from club' (see Figure 366). Ticking this option permits you to exclude a particular trigger from a club. For example you may want to exclude products from Faulding earning points.
11. The excluded supplier will be shown in red strikethrough text (see Figure 367).
12. Press the 'Exit' button to save and exit Clubs.



Figure 366

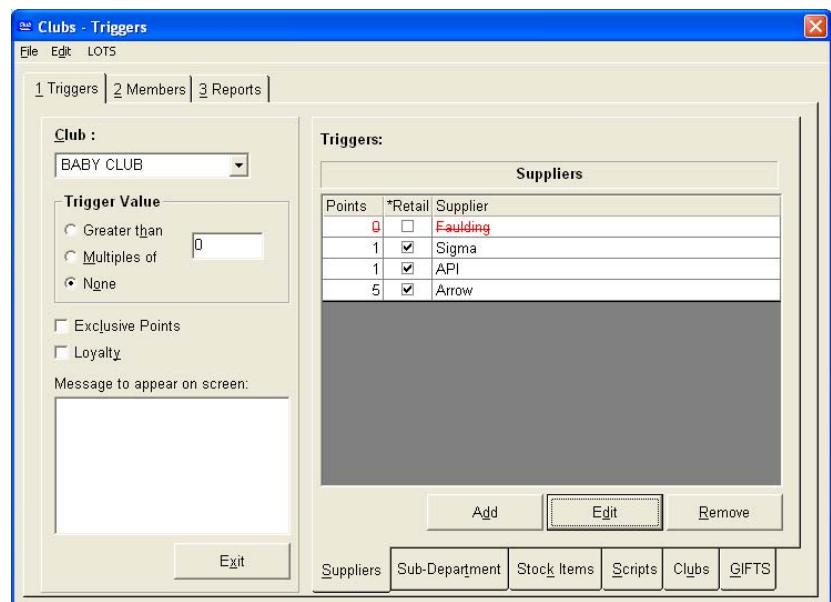


Figure 367

11.5.2 Sub-Department

1. Select the 'Sub-Department' tab along the bottom of the Club window (see Figure 368).
2. To add a Sub-Department select the 'Add' button.
3. This will display the 'Select Sub-Department' drop-down list (see Figure 369), select the sub-department followed by 'OK'.
4. Every product within this sub-department will now be a trigger for a club sale.
5. If the 'Point Value' is set to 1 and the 'Points Related to retail (Points x retail)' option is ticked (Figure 370) then the system will equate \$1.00 to equal 1 point, enabling you to track club members' total spending.
6. Do not tick the 'Points Related to retail (Points x retail)' option if you want the sale of an item to count as 1 point. For example, your club might be "Buy five baby products and get the sixth baby product free." In this instance the sale of an item only needs to count as one point rather than the dollar value.
- Note:** If some cases you must wish to give additional points to people who purchase products from specific sub-department (e.g. Perfumery). In situations like this you could change the 'Point Value' field to 5.
7. We suggest that you leave '% Discount on Sale' at zero (0) unless your club type is a discount club.
8. Press OK to save.

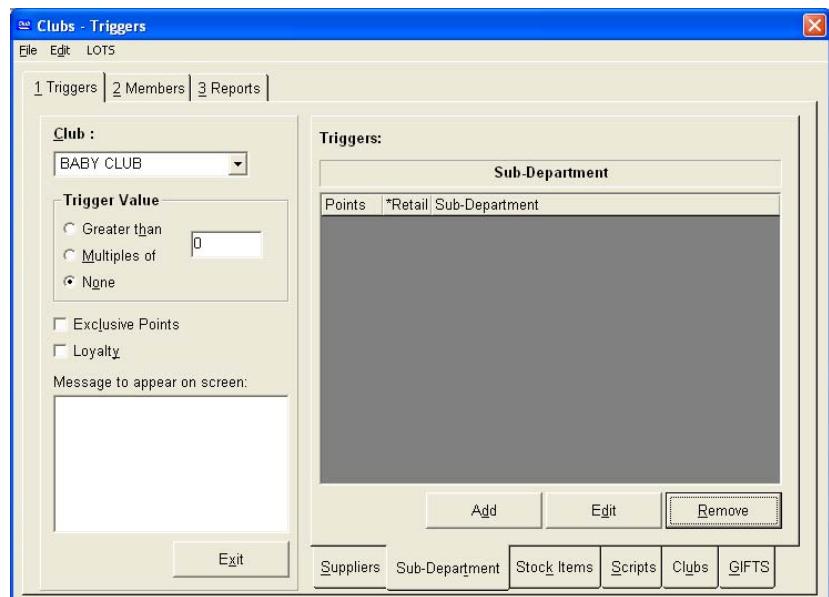


Figure 368



Figure 369



Figure 370

9. You can continue to add additional sub-departments to the list by selecting the 'Add' button again.

10. When adding any trigger to a club you will notice the option called 'Exclude this item from club' (see Figure 371). Ticking this option permits you to exclude a particular trigger from a club. For example you may want to exclude the entire 'Hair Care' sub-department from earning points.

13. The excluded sub-department will be shown in red strikethrough text (see Figure 372).

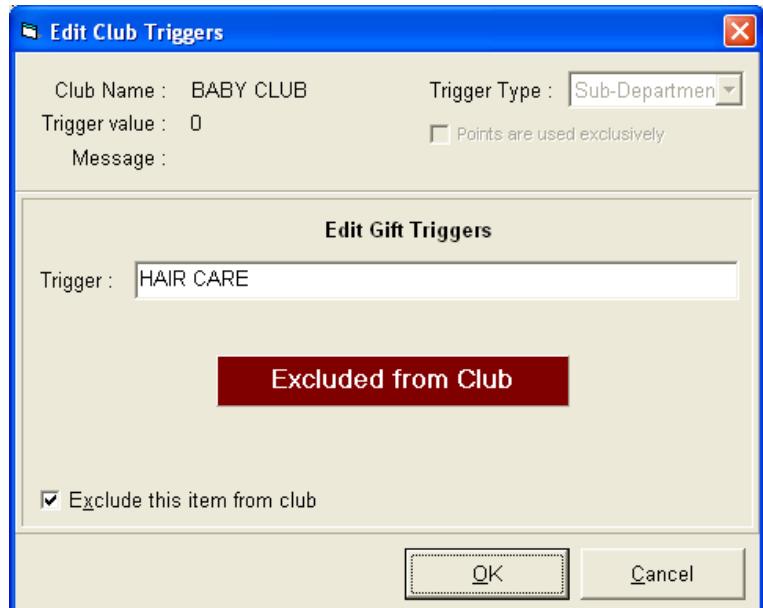


Figure 371

11. Press the 'Exit' button to save and exit Clubs.

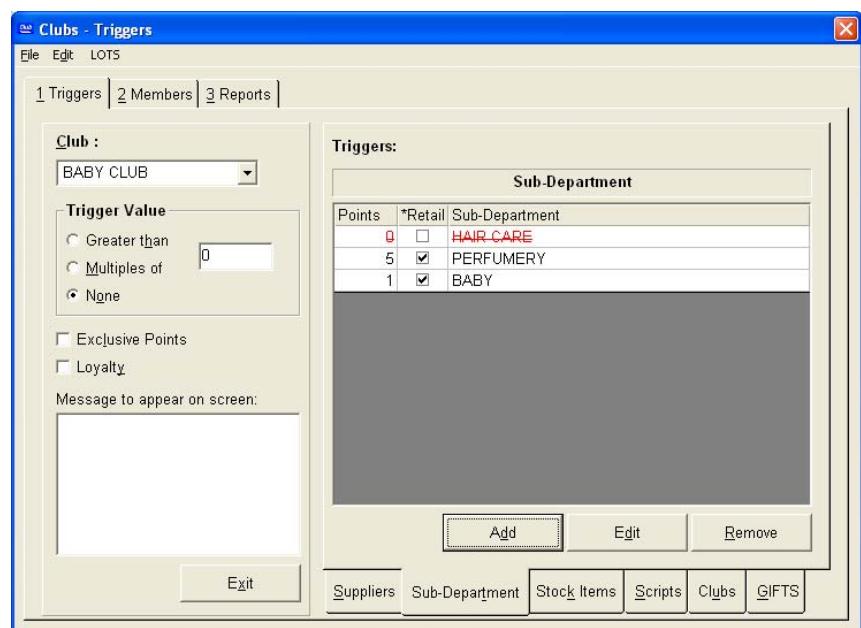


Figure 372

11.5.3 Stock Items

1. Select the 'Stock Items' tab along the bottom of the Club window (see Figure 373).
2. To add a Stock Item select the 'Add' button.
3. This will display the 'Item to add' drop-down list (see Figure 374), select the product you wish to add followed by 'OK'.
4. If you wish to add every single OTC item, select 'All OTC Items'.
5. If the 'Point Value' is set to 1 and the 'Points Related to retail (Points x retail)' option is ticked (Figure 375) then the system will equate \$1.00 to equal 1 point, enabling you to track club members' total spending.
6. Do not tick the 'Points Related to retail (Points x retail)' option if you want the sale of an item to count as 1 point. For example, your club might be "Buy five baby products and get the sixth baby product free." In this instance the sale of an item only needs to count as one point rather than the dollar value.

Note: If some cases you must wish to give additional points to people who purchase specific stock items (e.g. Multi Vitamins). In situations like this you could change the 'Point Value' field to 5.

7. We suggest that you leave '% Discount on Sale' at zero (0) unless your club type is a discount club.
8. Press OK to save.

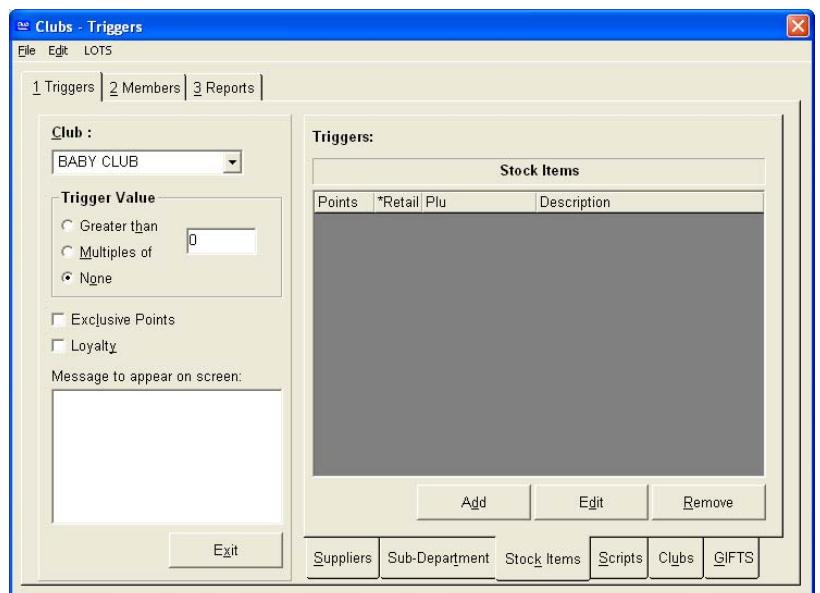


Figure 373



Figure 374

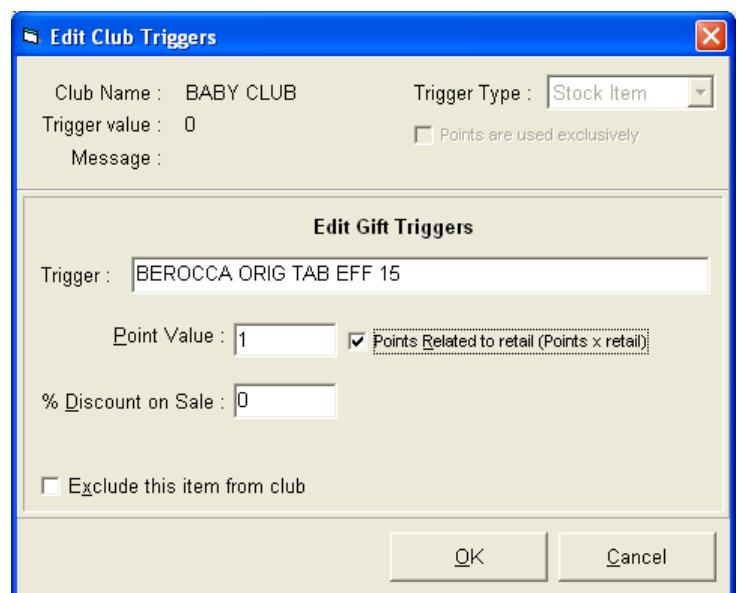


Figure 375

9. You can continue to add additional products to the list by selecting the 'Add' button again

10. When adding any trigger to a club you will notice the option called 'Exclude this item from club' (see Figure 376). Ticking this option permits you to exclude a particular trigger from a club. For example you may want to exclude 'Hairy Lemon' from earning points.

11. The excluded stock item will be shown in red strikethrough text (see Figure 377).

12. Press the 'Exit' button to save and exit Clubs.

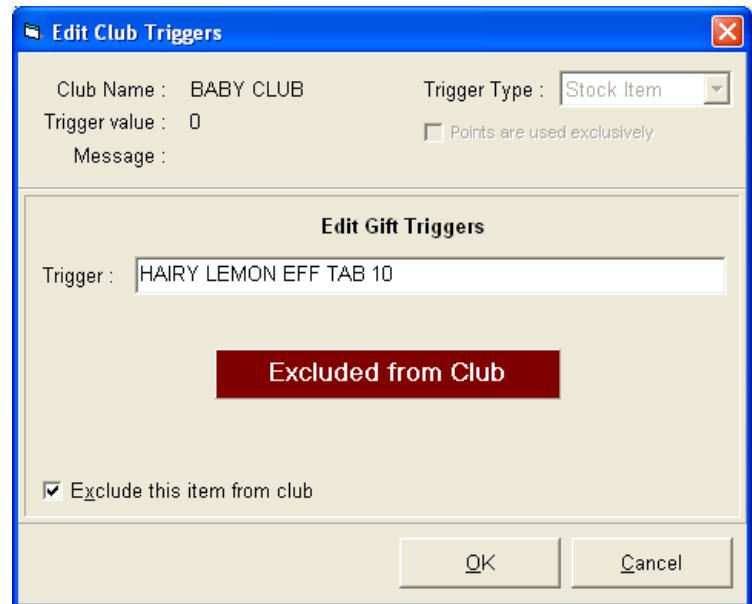


Figure 376

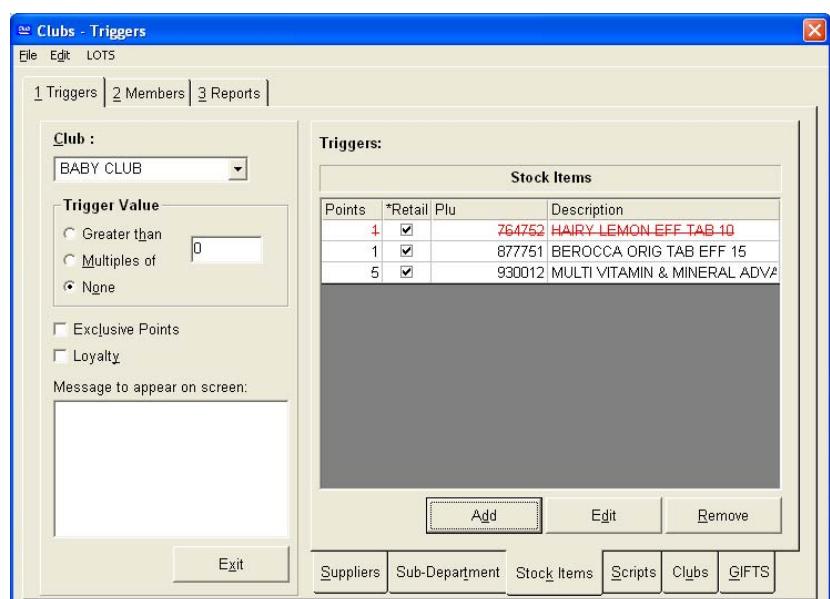


Figure 377

11.5.4 Scripts

The scripts tab is usually used to set scripts to exclude from clubs. As discounting of NHS Scripts is illegal, over issuing gifts/vouchers is in essence the same thing so must be excluded.

1. Select the '**Scripts**' tab along the bottom of the Club window (see Figure 378).
 2. To add a Script select the 'Add' button.
 3. This will display the 'Script Trigger' drop-down list (see Figure 379), select either:
 - **Private** – Private scripts only.
 - **NHS** – NHS scripts only
 - **All Scripts** – Both Private and NHS scripts.
 4. Select 'OK'.
 5. If the 'Point Value' is set to 1 and the 'Points Related to retail (Points x retail)' option is ticked (Figure 380) then the system will equate \$1.00 to equal 1 point, enabling you to track club members' total spending.
 6. Do not tick the 'Points Related to retail (Points x retail)' option if you want the sale of an item to count as 1 point. For example, your club might be "Buy five baby products and get the sixth baby product free." In this instance the sale of an item only needs to count as one point rather than the dollar value.
- Note:** If you wish to give more points to people who purchase scripts then you can increase the value in the 'Point Value' field.
7. We suggest that you leave '% Discount on Sale' at zero (0) unless your club type is a discount club.
 8. Press OK to save.
 9. Press the 'Exit' button to save and exit Clubs.

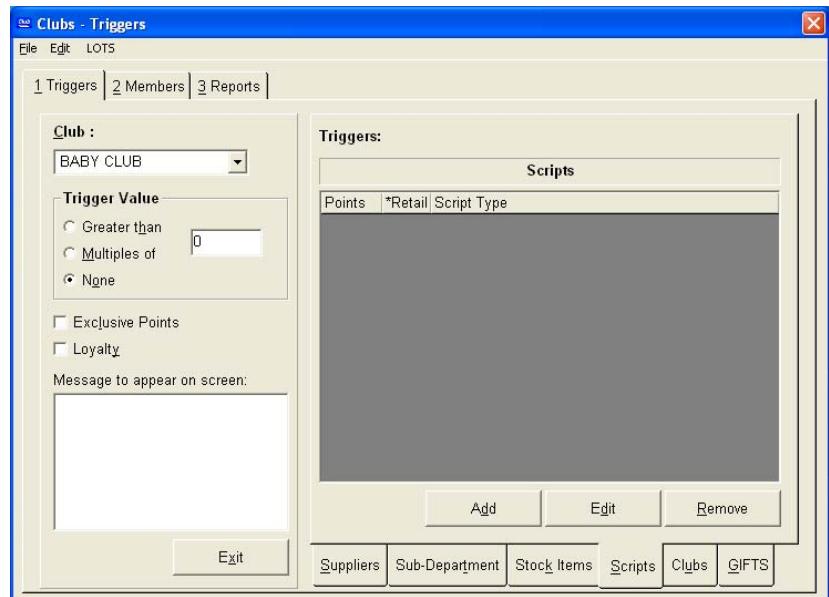


Figure 378

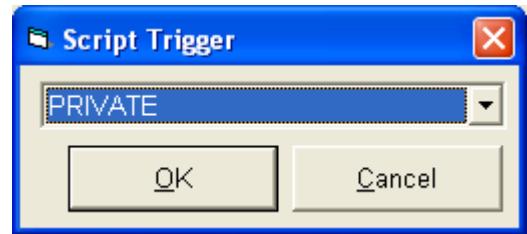


Figure 379



Figure 380

11.6 Adding Members To Your Club

Club members can be added/modified from within the Clubs module or from within Sales.

- To modify club members from within Clubs navigate to the **Modules** drop-down menu → Switch to **Members** (see Figure 381).

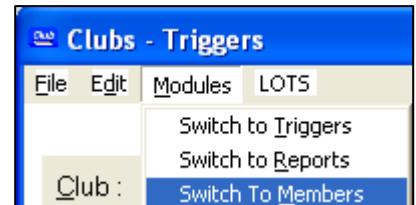


Figure 381

- Search for the person's name, then press <Enter>.

- When the person has been selected details of any existing club membership is displayed (see Figure 382).

- Add** – Add a club to this person.
- Edit** – Edit the club details for this person.
- Remove** – Remove this club from this person.

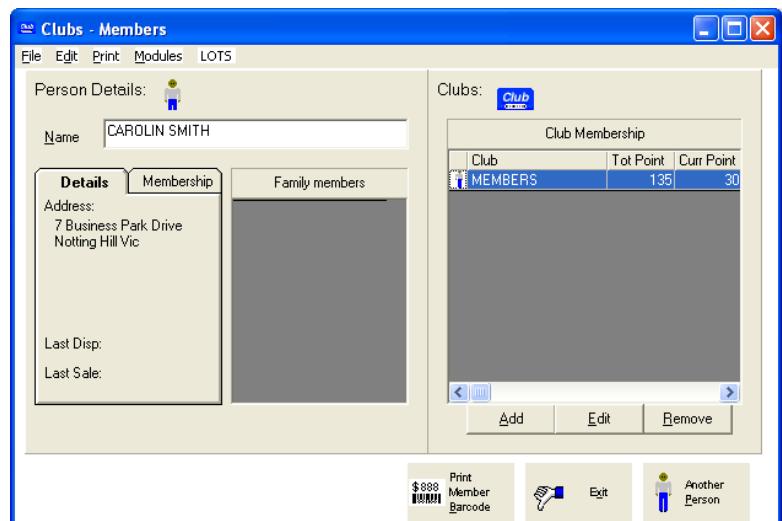


Figure 382

- Selecting the '**Add**' button prompts you to select the club to add to the person (see Figure 383).

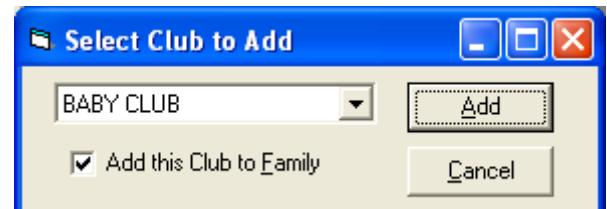


Figure 383

- Tick the option 'Add this club to 'Family' to automatically link linked family members.

- Selecting the '**Edit**' button permits you to edit the customer's current point balance and also the total points balance (see Figure 384). You may wish to give customer bonus points for joining the club.

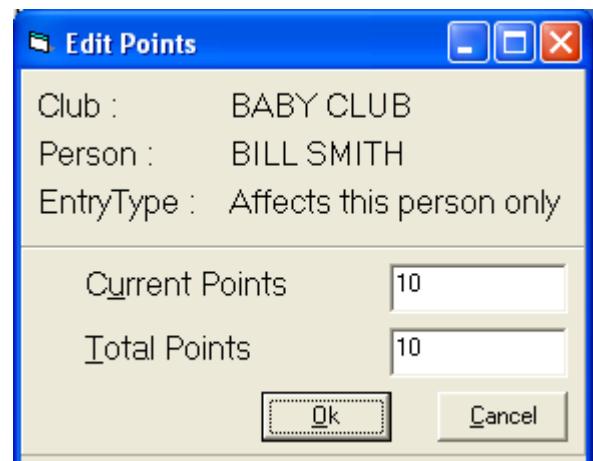


Figure 384

11.7 Adding Members On-The-Fly

The 'Sales' module has functionality to allow you to add members on-the-fly.

1. Navigate from the LOTS Start Menu → Sales → Edit drop-down menu → Edit Customer (see Figure 385).

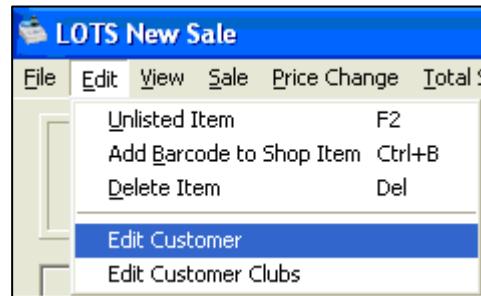


Figure 385

2. Search for the person's name, then press <Enter> (see Figure 386).

3. Search for the person you wish to add to a club.

4. If you cannot find the person select the 'New' Person button.

5. After checking/entering the customer's personal details select the Membership tab (see Figure 387).

6. Select the Edit Club button to edit this customer's club membership.

7. The Club Members window is displayed.

8. Select 'Add' to add a club to this customer.

9. Exit from the Club Members window then click 'OK' on the Patient Details window.

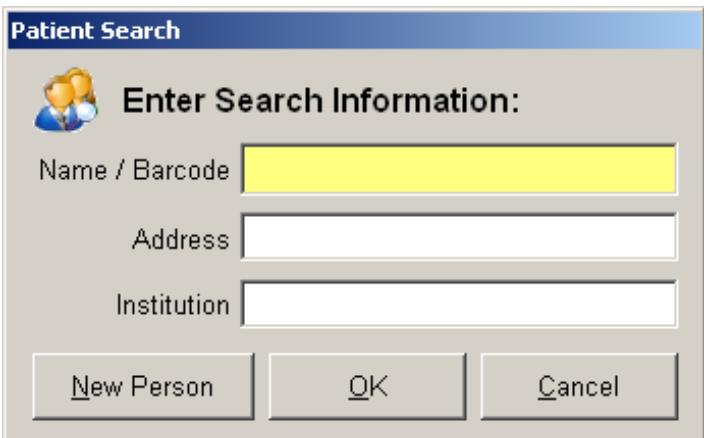


Figure 386

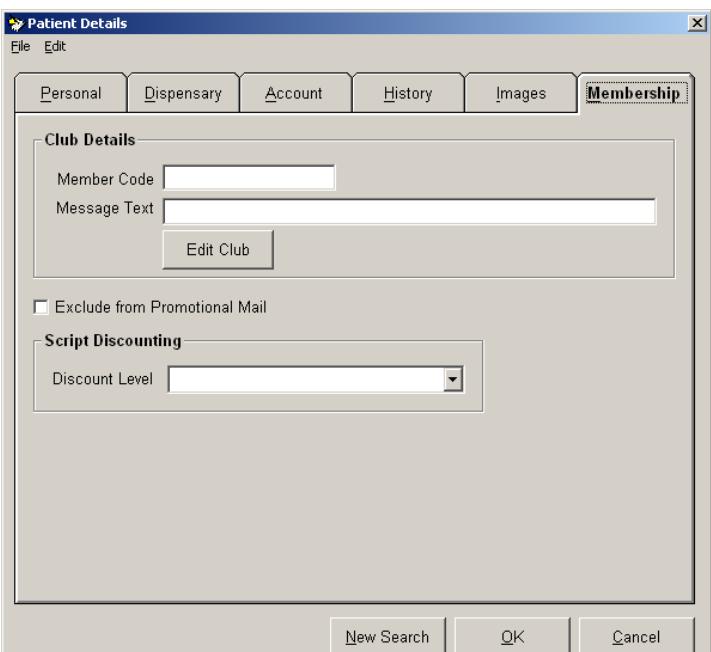


Figure 387

11.8 Loyalty Club With Free Gift Trigger

The 'Greater than' option is where you can nominate different gift triggers, for example with 200 points you might be able to get a free Baby Mat, with 300 points a baby lotion and with 1000 points 44 pack of nappies, etc. So basically the more points that you have, the better your gift is.

Alternately the 'Greater than' option can be used to redeem a club item, for example a hair colour club where the customer buys four hair colours and gets the fifth one free.

1. Create a club and set up club triggers.
2. Set the trigger type to 'Greater Than' (see Figure 388).

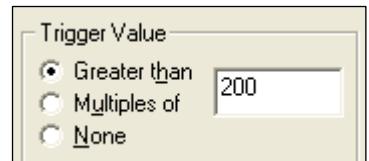


Figure 388

3. Set the trigger value to be the minimum spend for a gift to be issued.
4. Click on the GIFTS tab to setup the gift/s.
5. Press the 'Add' button to add a gift to the club. This will display the 'Add Gift' window (see Figure 389).
6. Search for the stock item you wish to add to the list of Gifts.



Figure 389

Note: The gift you wish to add to the club must be setup first as a Stock Card

7. If you wish to setup various options for gifts continue to add them to the list of gifts (see Figure 390).

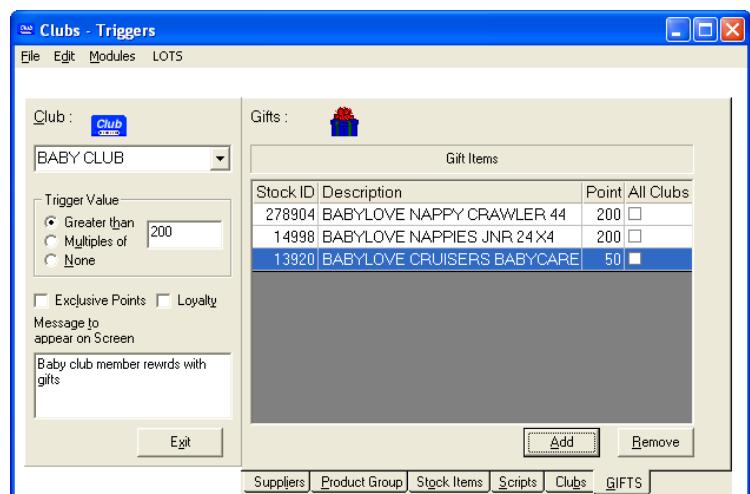


Figure 390

8. Upon sub-totalling the sale a prompt will appear asking if this is a club sale. Answering 'Yes' prompts for the customer name.
9. Upon totalling the sale the 'Club Summary' window (Figure 391) appears listing:
 - **POINTS** – How many points are being accrued from this sale
 - **Tally** – The customer's current points balance (including this transaction.)
 - **Next gift** – The next trigger point for this customer to earn a gift.

In this example the customer is eligible for a gift as their tally exceeds the next gift trigger.

10. The choice of gifts available is displayed (see Figure 392).
11. In this example the top option with a trigger of 1000 points is unavailable as the customer has only 430 points (see Figure 393).
12. Select the preferred gift from the available gifts by selecting the line number, i.e. – '2' for the Babylove Nappy.

The screenshot shows a Windows-style dialog box titled 'Club Summary'. It contains a table with four columns: CLUB, POINTS, Tally, and Next gift. The CLUB row shows 'BABY CLUB' with a value of 16. The Tally row shows 430. The Next gift row shows 200. At the bottom right are 'OK' and 'Adjust' buttons.

CLUB	POINTS	Tally	Next gift
BABY CLUB	16	430	200

Figure 391

The screenshot shows a Windows-style dialog box titled 'The point limits for this club have been exceeded'. It displays a message: 'The point limits for this club have been exceeded' and 'Baby club member rewards with gifts'. Below this, it shows 'Club Name: BABY CLUB' and 'Club Limit: 200'. It also shows 'Name: BILL SMITH', 'Customer Points: 430', and 'Lifetime Total: 780'. A table lists 'Customers Gifts' and 'Points' for various items. On the right, there is a 'Select Gifts' section with a table, a 'Clear Gifts' button, and 'Later' and 'Now' buttons at the bottom.

Select a Gift	Points
1 BABYLOVE WALK	1000
2 BABYLOVE NAPPY	200
3 BABYLOVE NAPPIE	200
4 BABYLOVE CRUISI	50
5	
6	
7	
8	
9	
0 Select Other Gift	

Figure 392

Note: If you wish to select another gift item that is not listed press '**0**' to select a different gift.

13. Select 'Now' to issue this gift now.
14. Select 'Later' to issue this gift later if the customer wishes for points to continue accruing.
15. When the gift is issued this is recorded on the customer's receipt.

The screenshot shows a table with two columns: 'Select a Gift' and 'Points'. The first row is highlighted with a blue background. The table includes line numbers 1 through 9 and a 'Select Other Gift' option at the bottom.

Select a Gift	Points
1 BABYLOVE WALK	1000
2 BABYLOVE NAPPY	200
3 BABYLOVE NAPPIE	200
4 BABYLOVE CRUISI	50
5	
6	
7	
8	
9	
0 Select Other Gift	

Figure 393

11.9 Loyalty Club With A Voucher

Click on the 'Multiples of' and key in your trigger amount. For example, when you spend \$200 you get issued a \$10 voucher.

1. Create a club and set up club triggers, refer to section: **11.5 – Triggers**.
2. Set the trigger type to **Multiples of** (see Figure 394).
3. Set the trigger value to be the minimum spend for a gift to be issued.
4. Click on the GIFTs tab to setup the gift/s.
5. Press the **Add** button to add a gift to the club. This will display the 'Add Gift' window (see Figure 395).
6. Search for the stock item you wish to add to the list of Gifts.

Note: The gift you wish to add to the club must be setup first as a Stock Card.

7. Insert the 'Points Required' before the customer will be eligible to receive this gift.

Note: When setting up the Stock Card for the Voucher, ensure that under the 'Pricing tab in stock cards that the GST Rate is set to '0%' and the GST Type is set to 'Free to End Consumer' (see Figure 396).

8. If you wish to set up various vouchers continue to add them to the GIFTs tab using the Add button.
9. When a club item is sold in Sales an icon indicates which items are club items.
10. Upon sub-totalling the sale a prompt will appear asking if this is a club sale.
11. Answering '**Yes**' prompts for the customer name.
12. Upon totalling the sale a window appears listing:
 - **POINTS** – How many points are being accrued from this sale
 - **Tally** – The customer's current points balance (including this transaction.)
 - **Next gift** – The next trigger point for this customer to earn a gift.

In this example the customer is eligible for a gift as their tally exceeds the next gift trigger (see Figure 397).

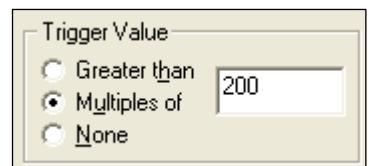


Figure 394



Figure 395



Figure 396



Figure 397

13. The choice of gifts available is displayed (see Figure 398).
14. In this example there is only one gift available (see Figure 399), the voucher at number one.
15. Select the preferred gift from the available gifts by selecting the line number, i.e. '1' for the voucher.

Note: If you wish to select another gift item that is not listed press '0' to select a different gift.

	Select a Gift	Points
1	\$10 VOUCHER	200
2		
3		
4		
5		
6		
7		
8		
9		
0	Select Other Gift	

Figure 398

16. Select 'Now' to issue this gift now.
17. Select 'Later' to issue this gift later if the customer wishes for points to continue accruing.

Club Summary

CLUB	POINTS	Tally	Next gift
BABY CLUB	16	430	200

OK **Adjust**

Figure 399

11.10 Loyalty Club With A Discount

1. Create a club and set up club triggers.
2. Set the trigger type to 'None' (see Figure 400).
3. When setting up the club triggers tick the 'Discount on Sale' option and enter the discount you wish to give to club members (see Figure 401).
4. When a club item is sold in Sales an icon indicates which items sold are club items.
5. Upon sub-totalling the sale a prompt will appear asking if this is a club sale. Answering 'Yes' prompts for the customer name.
6. After the customer has been selected and the sale is sub-totalled the discount is automatically applied to club items in the sale (see Figure 402).

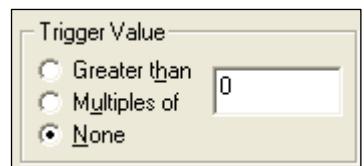


Figure 400

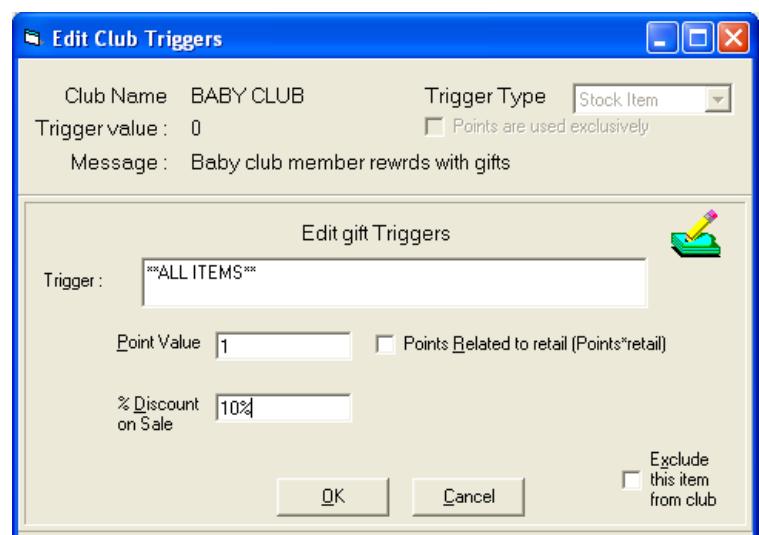


Figure 401

	Stock Item	Quantity	Retail	Disc
CLB	CURASH BABY PWDR A/RASH 100	1	\$8.30	10%
	ROUNDING	1	\$0.03	

Figure 402

7. A window is displayed showing the customer's current spend and the sale concludes normally (see Figure 403).

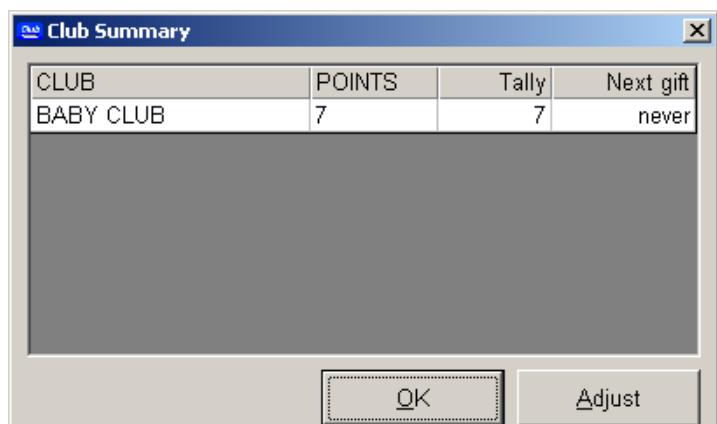


Figure 403

11.11 Loyalty Club To Track Purchases Only

The 'None' option is selected when you don't have a trigger for your club, but you want to record the club member sales. You may wish to do this for mail-out purposes or simply to keep a record of what shades of cosmetics a customer is purchasing so it is on the computer for next time.

1. Create a club.
2. Set the trigger type to None (see Figure 404).
3. When setting up club triggers tick the 'Points equal's dollars' option so you have a record of customer's spending (see Figure 405).

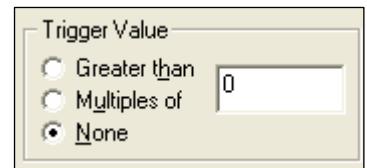


Figure 404

4. When a club item is sold in Sales an icon indicates which items sold are club items.
5. Upon sub-totalling the sale a prompt will appear asking if this is a club sale. Answering 'Yes' prompts for the customer name.
6. The sale concludes normally.

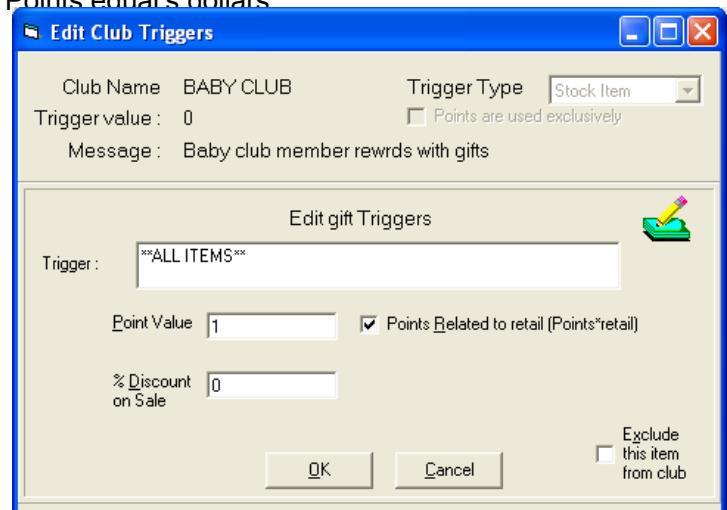


Figure 405

7. A window is displayed showing the customer's current spend (see Figure 406).

Club Summary				
CLUB	POINTS	Tally	Next gift	
BABY CLUB	7	7	never	

Figure 406

11.12 Loyalty Club Reporting

One of the most important aspects of a club is the ability to use the accumulated customer statistics for marketing. LOTS provides powerful and easy-to-use tools that enable you to produce lists of club members based on their buying habits. These lists can be used to print mailing address labels or perform mail merges with most popular word processors.

To access the reports module within Clubs navigate to the Modules drop-down menu → Switch to Reports. Various reports are available from the 'View' menu.

11.12.1 Members Of A Club

1. To view Members of a Club, select 'View' → Members of a Club (see Figure 407).



Figure 407

2. Select the desired club.
3. A screen will be displayed (see Figure 408) with all club members, their name, address, their current points and total points balances.

4. The list can be exported (for use as a mail-merge file in your word-processing program) or printed.

A screenshot of a Windows application window titled 'Clubs - Reports'. The menu bar includes 'File', 'View', 'Print', 'Modules', and 'LOTS'. Below the menu is a title 'Members of Club 'BABY CLUB''. The main area contains a table with the following data:

Name	Address	Curr Points	Tot Points
JANE DOE	1 ANY STREET ANYWHERE	0	0
CLUB MEMBER	1 ANY STREET ANYWHERE	7	7

At the bottom of the window are three buttons: 'Export to File', 'Print Current Report', and 'Exit'.

Figure 408

11.12.2 Member History

1. To view member history, select 'View' → Member History.
2. After being prompted for a selecting the club member their history is displayed on the screen (see Figure 409).
3. The list can be exported (for use as a mail-merge file in your word-processing program) or printed.

The screenshot shows a software window titled 'Clubs - Reports'. The menu bar includes 'File', 'View', 'Print', 'Modules', and 'LOTS'. A sub-menu 'Club Transactions for 'CLUB MEMBER'' is open. The main area displays a table of transactions:

Date	Item	Quan	Club	Points
02-04-2008 14:30	REV HI&DRI A/P R/D 75ML	1	LOYAL CUSTOMER	5
02-04-2008 14:31	REV HI&DRI A/P R/D 75ML	1	LOYAL CUSTOMER	5
	GIFT (LOYAL CUSTOMERS) GIFT BODY LO 300	1	LOYAL CUSTOMER	-300
02-04-2008 15:00	REV HI&DRI A/P R/D 75ML	1	LOYAL CUSTOMER	5
02-04-2008 15:01	REV HI&DRI A/P R/D 75ML	1	LOYAL CUSTOMER	5
	GIFT (LOYAL CUSTOMERS) VOUCHER ISSU 200	1	LOYAL CUSTOMER	-200
02-04-2008 15:25	CURASH BABY PWDR A/RASH 100	1	BABY CLUB	7
02-04-2008 16:13	LC CONC E/LONGUE TEN AMBRE	1	PHARMACY CLUB	45
		8		-428

At the bottom of the window are buttons for 'Export to File', 'Print Current Report', and 'Exit'.

Figure 409

11.12.3 Club Analysis

1. To perform a Club Analysis report, select 'View' → Club Analysis.
2. Within the 'Club Analysis' section there are different types of reports you can obtain, depending upon the information that you enter in.
3. The first tab, 'Members' (figure 410), allows you to search on various member filter/s to produce a report.

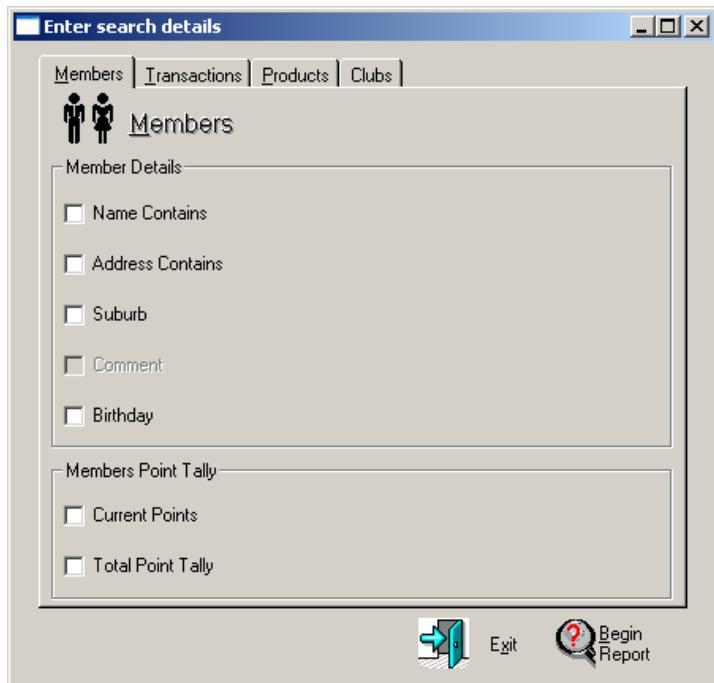


Figure 410

Note: For example, produce a list of everyone residing in a particular suburb, who's having a birthday in a particular month or who is about to reach the next trigger.

4. The second tab in Club Analysis (see Figure 411) enables you to report on club activity.

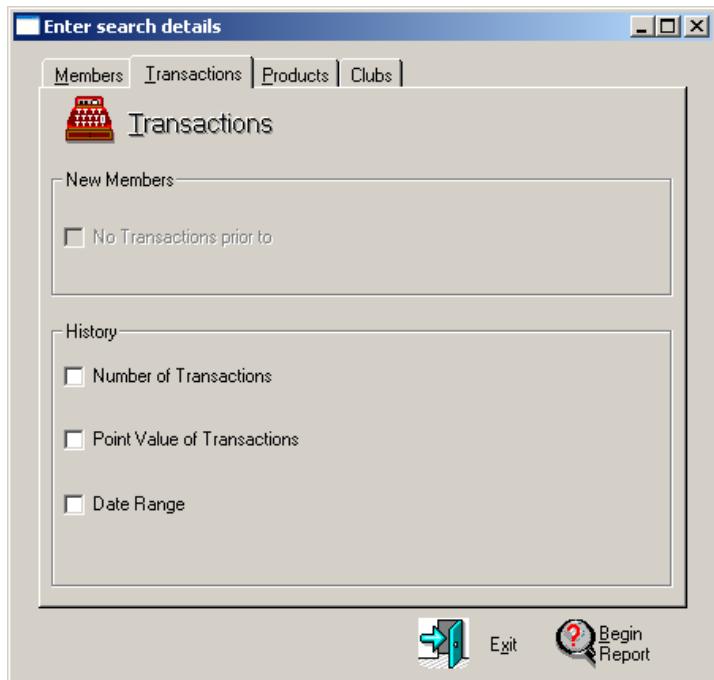


Figure 411

- The third tab in Club Analysis enables you to search for transactions filtered by products sold (see Figure 412).

- Search for transactions including products sold for a particular Supplier, Product Group or Name.

Note: To identify all club members who have purchased a photo frame search on the word 'frame' in Name Contains, as shown (in Figure 412).

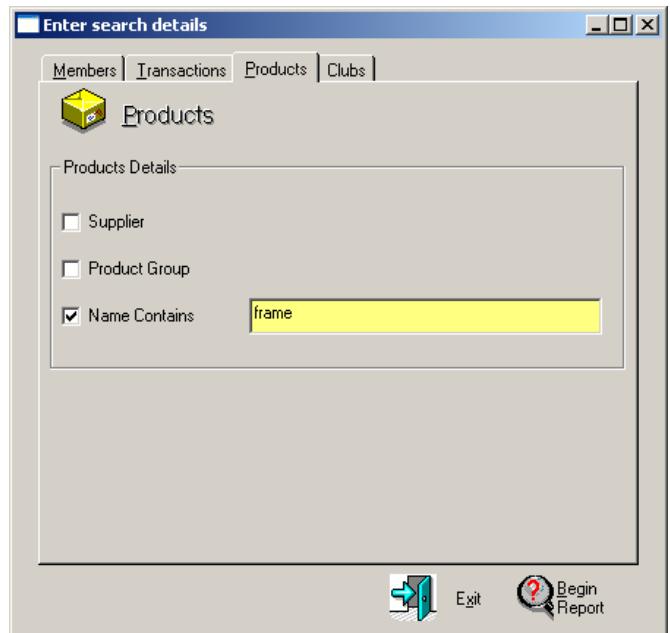


Figure 412

- The fourth tab (Figure 413) in Club Analysis enables you to search for transactions filtered by club.

- When you have selected all the filter/s you wish for your Club Analysis report select 'Begin Report'.

- The results of the Club Analysis report are displayed on the screen and can be exported (for use as a mail-merge file in your word-processing program) or printed.

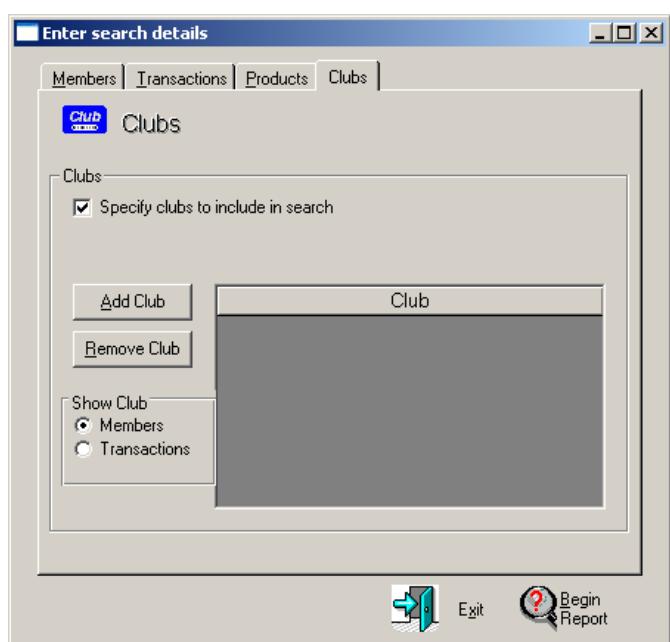


Figure 413

11.12.4 Best Customer

1. To perform a Best Customer report: select 'View' → Best Customer.
2. You will be prompted for a start date and finish date and then the results are displayed on the screen. The report lists the club members, their total points and their \$ purchases within the selected date range.
3. The list can be exported (for use as a mail-merge file in your word-processing program) or printed.

11.12.5 Club Gifts

1. To view Club Gifts, select 'View' → Club Gifts.
2. You will be prompted to enter the date range and select the club/s you wish to report on (see Figure 414).
3. The list of gifts issued during the selected date range for the selected club/s is displayed on the screen.
4. The list can be exported or printed.

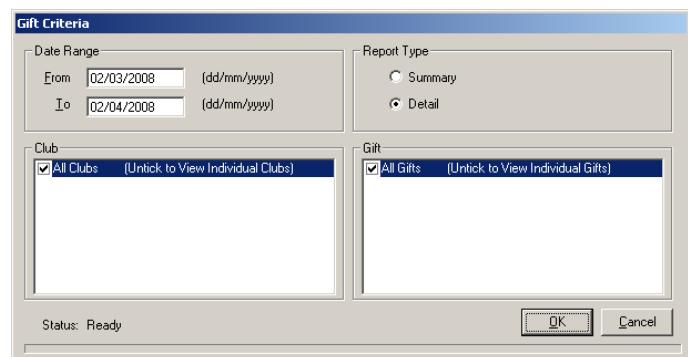


Figure 414

12 USING THE LOTS VOUCHER FUNCTION

The Voucher program provides you with the facility to print a promotional offer or discount voucher at the end of the docket if items purchased exceed a preset amount.

An example of a voucher program is a fuel discount voucher used by supermarkets, if you spend a minimum of \$30.00; a discount voucher message is printed on your supermarket docket. If the docket is presented to a participating fuel station you receive discount on your fuel purchase.

The Voucher program may be used for a number of Pharmacy promotional or loyalty programs.

12.1 Setting Up Receipt Voucher

1. Navigate from the LOTS Start Menu → Tools → Options → POS Receipts (see Figure 415).
2. You will need to ensure 'Enable Receipt Voucher' is ticked.
3. Set your 'Minimum Sale Value' (defaults to \$30.00).
4. Type the Voucher message that will be displayed on the bottom of the docket if the minimum purchase is reached. Then select 'OK' to save.

Note: PBS scripts are not included in the minimum purchase amount. In addition, ticking 'Allow Scripts (Private Scripts Only)' will include private scripts in the minimum purchase total. If unticked no script items will be included.

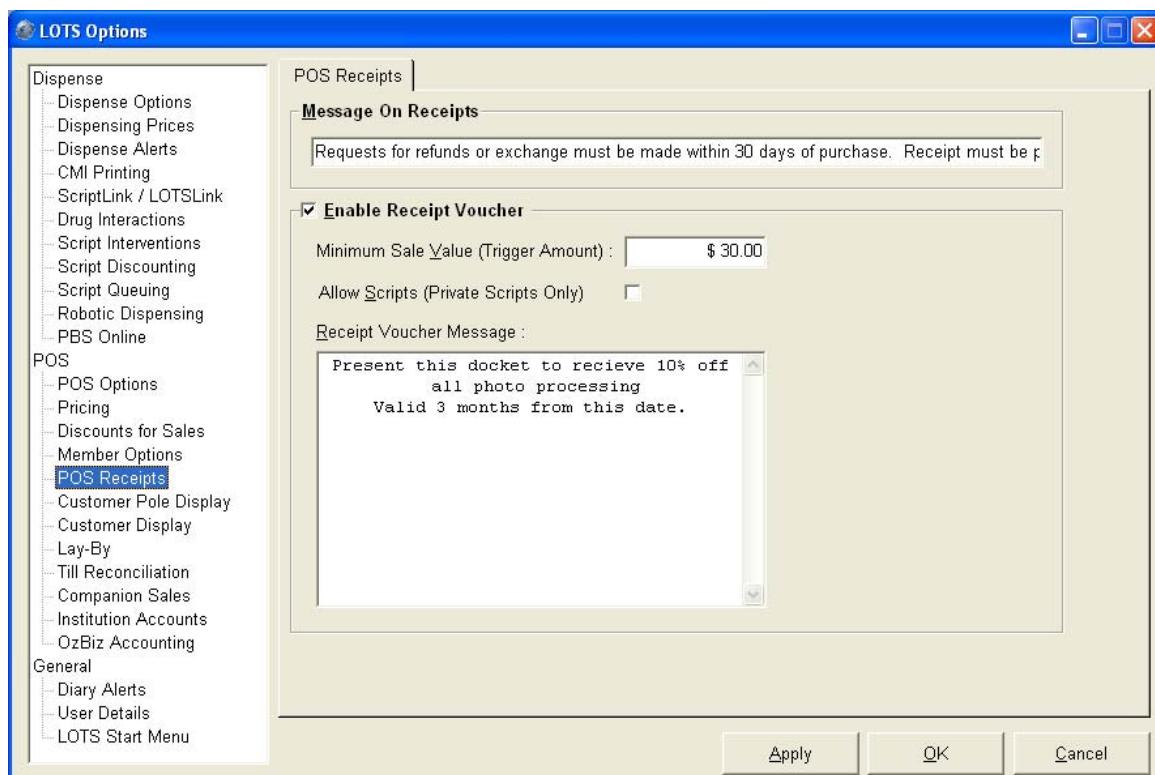


Figure 415

12.2 Printing Vouchers

Process sales at the register as normal. If the purchase is greater than minimum amount set (excluding PBS scripts) the docket will print the voucher message (as shown in Figure 416).

<p>Original Tax Invoice Corum Health Services 7 BUSINESS PARK DRIVE NOTTING HILL Phone: 8541 6988 ABN 1111 111 111 11 Unit Name: VICWKS006</p>	
<hr/> <p>1 *BEROCCA PERFORM EFF 15 \$13.95</p> <hr/>	
<p>TOTAL \$13.95</p> <hr/>	
<p>Cash \$15.00 Change \$1.05 Total includes GST of \$1.27</p>	
<p>Served by Cathy</p> <hr/>	
<p>13 Aug 2009 17:03 74505</p> <hr/>	
<p>Present this docket to receive 10% off all Photographic Developing and Printing. Valid 3 months from this date.</p>	
<p>Sale Total : \$13.95 (Excludes Prescriptions)</p>	
<p>Docket #74505 13-08-2009</p>	

Figure 416

13 Backup LOTS

A daily backup of your LOTS database should be performed every day. The backup will backup your entire LOTS database, including both dispense and POS data. The backup also performs other tasks such as re-setting the audit trails and enabling POS standalone functions.

Corum recommends using at least two different backup disks (preferably seven, one for each day of the week) and alternating them so in the event of a data recovery there are at least two generations of backups to return to.

The backup should always be performed on the LOTS Master computer with LOTS exited completely on every Slave computer.

1. From the LOTS Start Menu → Tools → 'Backup LOTS'.

2. The 'Insert Backup Disk Now' window appears prompting you to enter your backup disk into the drive and ensure that LOTS is not in use on any other computer (as shown in Figure 417).

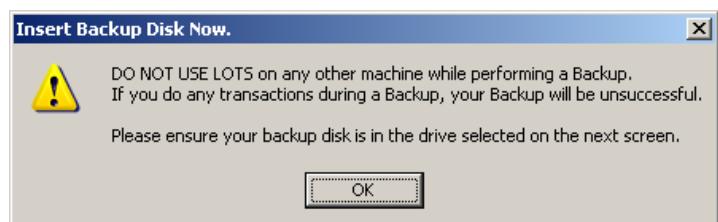


Figure 417

3. Check that the correct backup type (Backup LOTS DataBase only (Daily Backup)) is selected then click 'Backup' (as shown in Figure 418).

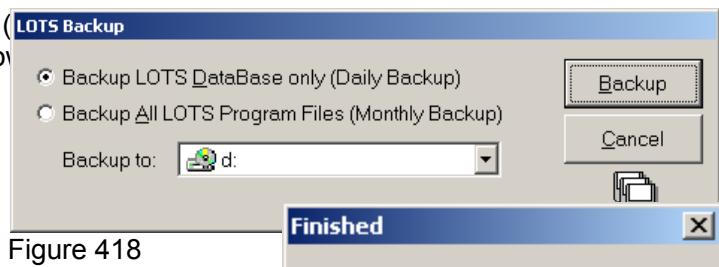


Figure 418

4. The 'Finished' window appears notifying you that the backup has completed successfully. Select 'OK' (as shown in Figure 419).



Figure 419

Note: Corum has a backup solution 'Corum Backup' to give you complete peace of mind that your valuable data is being protected. Corum Backup will backup all your Corum applications in addition to other folders you may wish to backup such as documents and emails. The backup will run automatically overnight and will send an email to Corum Support if the backup encounters errors or doesn't run.

14 LOTS Program Updates

- When a Program Update is detected you will see Figure 420 when you start up LOTS.
- View Release Notes** – will display Release Notes in PDF format. You will need Adobe Reader installed to view the Release Notes. For information on how to install Adobe Reader contact Customer Support on 1300 760 022.

Note: The Release Notes can be printed from within the Release Notes window. It is strongly recommended that you print the Release Notes so all staff can read them and be familiar with new functionality.

- After viewing the Release Notes the update screen (Figure 421) will reappear with all three options still active.

Note: The following steps only relate to the 'Install Now' option on a Program Update.

- Install Now** – If you choose 'Install Now', you will be prompted with a warning ensuring that you have performed a backup (see Figure 422).
- If you have performed a backup proceed by selecting 'Yes'.
- After selecting 'Yes', a warning will appear asking you to ensure you are out of LOTS on all machines (see Figure 423).

Note: It is also advised that you close all other applications running on your PC before performing the update.

- Once you have checked that you have exited out of LOTS on a
- The 'Setup – LOTS' window is the

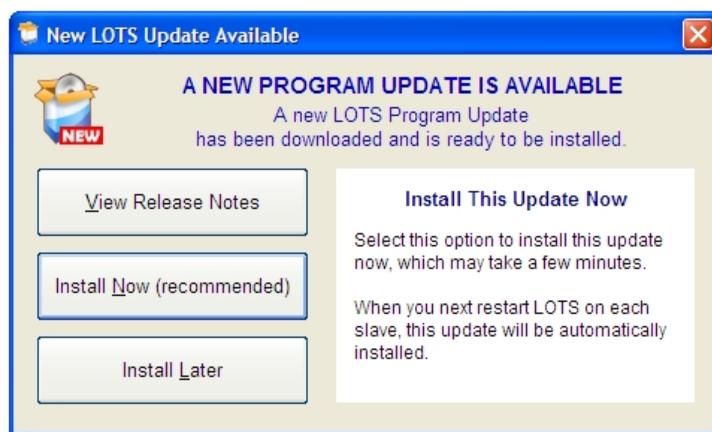


Figure 420

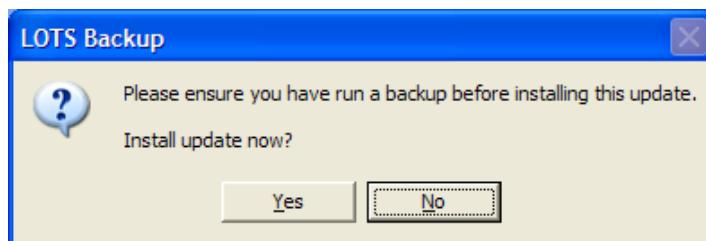


Figure 421

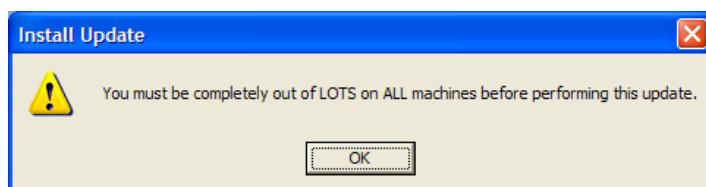


Figure 422

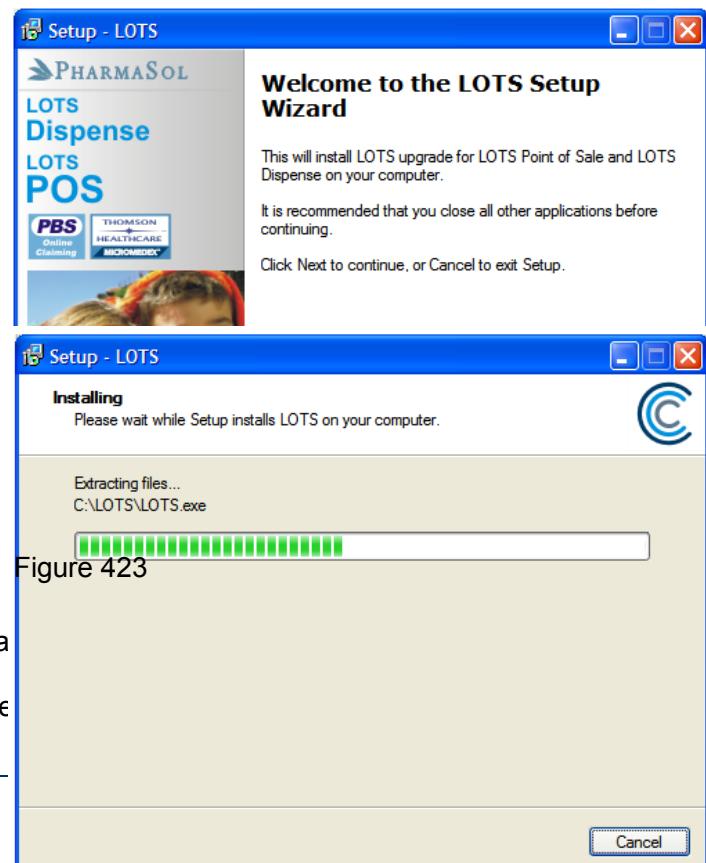


Figure 423

9. Select 'Next' to continue.
10. The program update will then begin to install (see Figure 424).

Figure 424

11. The install will then proceed to update the 'Database Layout' (see Figure 425).

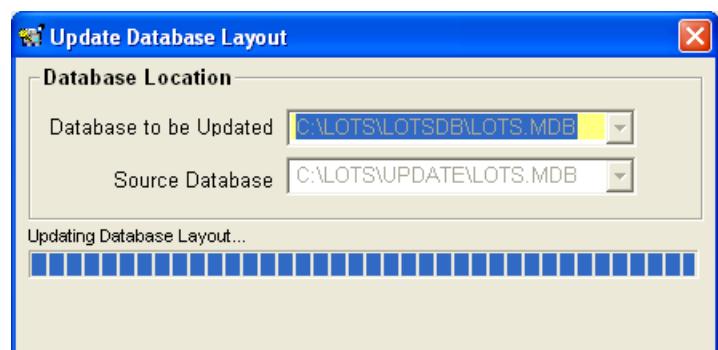


Figure 425

12. Once the Database Layout has been updated the 'Upgrade Database' window will appear (see Figure 426).

Note: The database upgrade may take several minutes, depending on the size of your database.

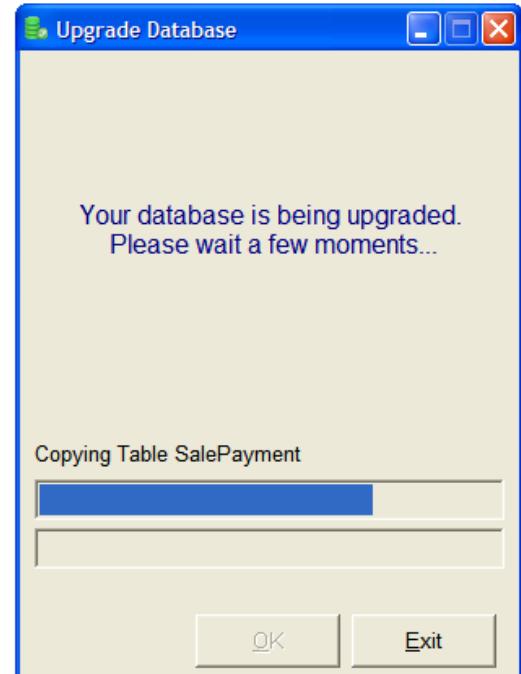


Figure 426

13. When the Database Upgrade is complete, you will receive a confirmation message (see Figure 427). Select 'OK' to proceed.

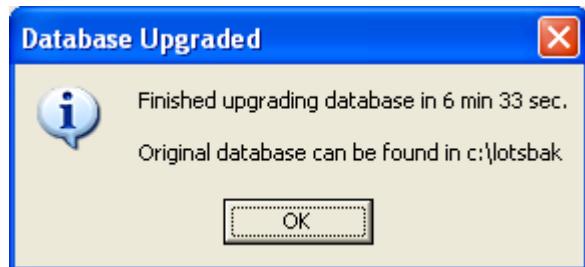


Figure 427

14. You will then be brought to the 'Completing Setup LOTS' screen (see Figure 428). Select 'Finish' to complete the installation.



Figure 428

15. The installation is now complete and you can now begin the program update installation on each slave computer.

14.1 Installing LOTS Program Update On Slaves

1. Open LOTS on your slave computer.
2. You will be prompted with the 'Install Update' message (see Figure 429). Select 'OK'.



Figure 429

3. The slave will then copy the installation files from the Master computer (as shown in Figure 430).

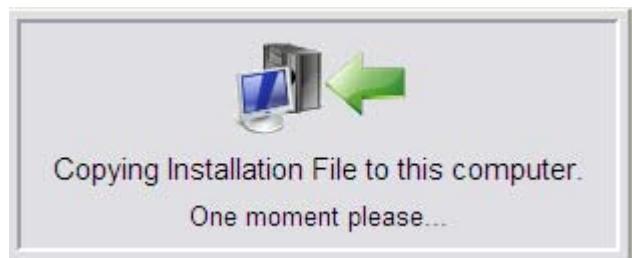


Figure 430

4. After the files have been copied do **Setup Wizard** screen will be displayed.
5. Click the 'Next >' button to continue.



Figure 431

- The next screen to appear will be the LOTS installation screen (as shown in Figure 432).

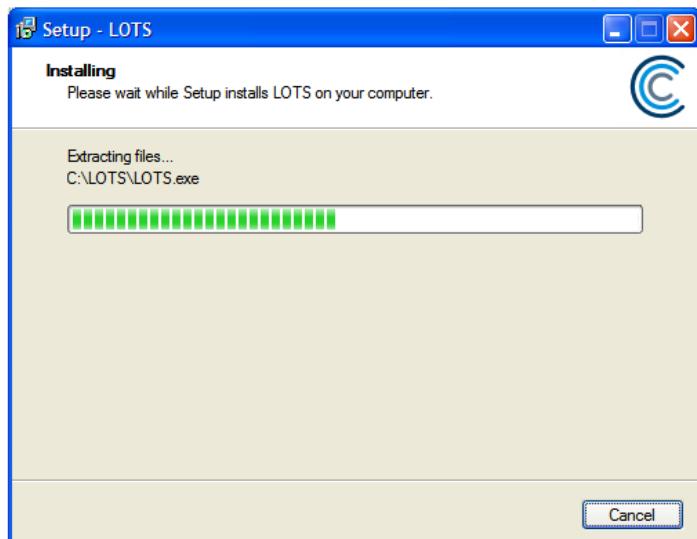


Figure 432

- Once the install has been completed the 'Update Database Layout' window will be displayed (as shown in Figure 433).
- Once the Update Database Layout has been updated you will be prompted with the 'Completing LOTS Setup' screen (see Figure 434). Select 'Finish' to complete the installation.

Note: If you choose to 'Install Later' on the Master, the same window (Figure 420) will appear each time you start up LOTS until you install the update.

If you do not wish to install the update right away, choose 'Install Later' to continue using your previous version of LOTS.

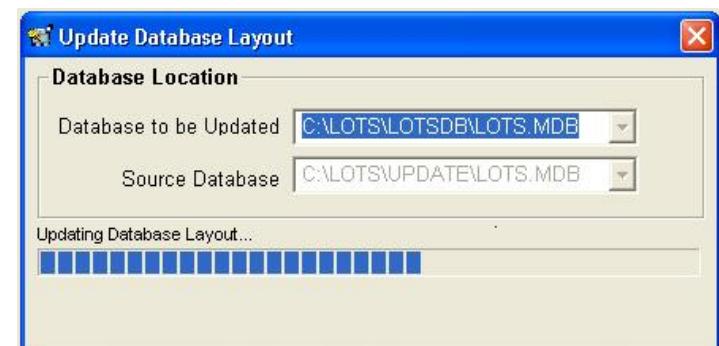


Figure 433



Figure 434

14.2 View Installation History

- The option in the LOTS Help menu called 'View Installation History' (Figure 435) displays a history of every installation performed on the Master and Slave PCs.

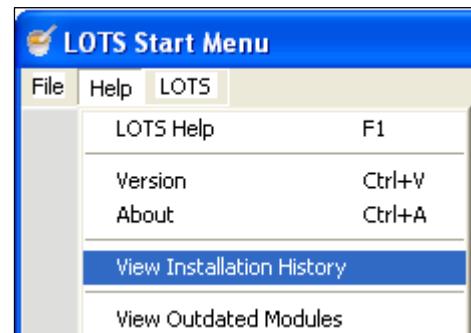


Figure 435

- The most recent installations are shown at the top of the list (see Figure 436).

Note: If you only want to show the installation history of the current PC, go to the 'View Installation History' on that PC and tick the 'This Computer Only' tick box.

You can also filter for just 'Program Updates' or just 'Drug Updates' by using the tick boxes located at the top of the window (as shown in Figure 437).

- You can view the original PDF Release Notes by highlighting the installation in the list and clicking 'View Release Notes' (see Figure 437).

Note: If no Release Notes are found for a selected release, the 'View Release Notes' button will be disabled.

- To print out this list click the 'Print' button.

LOTS Installation History				
<input checked="" type="checkbox"/> Program Updates		<input checked="" type="checkbox"/> Drug Updates		
Installation Filename	Update Type	Installation Date	Computer Name	Master?
L2016R00.EXE	Program Update	01/04/2008 8:20 AM	TILL1	No
L2016R00.EXE	Program Update	01/04/2008 8:00 AM	DISPENSE1	Yes
L2015R00.EXE	Program Update	27/02/2008 8:03 AM	DISPENSE1	Yes
L2015R00.EXE	Program Update	27/02/2008 8:09 AM	TILL1	No
D0803R00.EXE	Drug Update	01/03/2008 8:12 AM	TILL1	No
D0803R00.EXE	Drug Update	01/03/2008 7:50 PM	DISPENSE1	Yes

Figure 436

LOTS Installation History				
<input checked="" type="checkbox"/> Program Updates		<input checked="" type="checkbox"/> Drug Updates		
Installation Filename	Update Type	Installation Date	Computer Name	Master?
L2016R00.EXE	Program Update	01/04/2008 8:20 AM	TILL1	No
L2016R00.EXE	Program Update	01/04/2008 8:00 AM	DISPENSE1	Yes
L2015R00.EXE	Program Update	27/02/2008 8:03 AM	DISPENSE1	Yes
L2015R00.EXE	Program Update	27/02/2008 8:09 AM	TILL1	No
D0803R00.EXE	Drug Update	01/03/2008 8:12 AM	TILL1	No
D0803R00.EXE	Drug Update	01/03/2008 7:50 PM	DISPENSE1	Yes

Figure 437