



**Assyst Point of Sale
Ordering
User Guide
Version 4.12**

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Introduction to Assyst POS Ordering

Assyst Point of Sale includes an integrated module for management of purchase orders. This module allows users to generate purchase orders, track purchase order status, and receive products using previously entered purchase orders.

This user guide provides information on the creation of purchase orders for products existing in the Assyst Point of Sale Application.

Vendor Settings

Before the system may be used for ordering, it is necessary to have at least one vendor on file.

To access **Vendor Maintenance**, use the drop down menu below **Settings** on the **Miscellaneous** panel of the Order Processing ribbon group.

The screenshot shows the 'Vendor Maintenance' window with the following fields and sections:

- Search:** A text box with a magnifying glass icon.
- Code:** ABCC
- Vendor:** AMERISOURCE
- Contact:** JOHN DOE
- Phone #:** 306-555-3333
- Street:** 123 WAREHOUSE WAY
- Street2:**
- City, PR:** SASKATOON, SK
- Postal Code:** S7X 1B9
- Tabs:** General (selected), Communications, Additional Info, Account Detail, Account History.
- General Tab Fields:**
 - Email:** emailaddress@domain.net
 - Fax #:** 306-555-2222
 - Type:**
 - Terms:** 0 (Due Immediately)
 - Status:** ☒ Regular ☐ Hold Payment
 - Default G/L Dist:** 0
- Historical Information:**

Y-T-D Purchases:	0.00	Last Year Purchases:	0.00
Y-T-D Discounts:	0.00	Last Year Discounts:	0.00
LAST Purchase Amt:	0.00	Last Cheque Date:	0000/00/00
LAST Purchase Date:	0000/00/00		
- Footer:** Enter Vendor Name

The Vendor Maintenance window may be used to create, modify, or remove vendor records from the system.

A vendor already entered in the system may be viewed or modified using either the Search bar or the lookup.

The Search option will search for partial matches of vendor names and/or codes if a match starting with the text keyed into the search is not found. If a single match is found, the system will display that vendor record.



Adding a Vendor

Click on the  Add New button to create a new vendor.

First assign the vendor a code. If numeric vendor codes are in use, the system will automatically assign a new vendor code. If the vendor codes in use use letters, or a combination of letters and numbers, the new code must be selected by the user.

The vendor Name field should also be filled in at a minimum to ensure that the new vendor may be found using the lookup.

Set the options as desired and save the new vendor record.

Modifying a Vendor

Any vendor for which the full details are displayed onscreen may be modified directly. To retain changes, click on the Save button before closing the vendor record.

Deleting a Vendor

Any vendor for which the full details are displayed onscreen may be deleted. Click on the  icon to delete the displayed vendor.

 **NOTE:** Deleted vendors' histories may not be recovered.

Vendor Settings

The settings in Vendor Maintenance may be used to record information about specific vendors. Settings contained in Vendor Maintenance may also be used to determine how the system will manage ordering, receiving and import settings involving the vendor.

Code – The vendor Code is used to uniquely identify the vendor in the system. For example, if a site orders from two different warehouses belonging to the same vendor, they may choose to have two vendor records using the same vendor name. The use of a unique code allows for each vendor record to be maintained separately even where other similarities exist.

Vendor Codes may only be configured when first creating a new vendor record. While vendor codes may be changed in the Accounts Payable module, such activities should be undertaken under caution.

If a vendor code is changed, Assyst Point of Sale will NOT reassign any installed catalogues to the new code, nor will it modify the vendor code assigned to items in Item Maintenance.

If a vendor code is to be changed, and is attached to records in Item Maintenance, Item Quick Maintenance may be used to find and quickly modify all items which may require adjustment.

However, if a vendor code is to be changed for a vendor with an attached electronic catalogue, the catalogue will need to be reinstalled. Should this situation apply, contact the Support team at TELUS Health for further guidance.



At the top of the Vendor Maintenance screen are basic contact details for a vendor.

Name – Key in the vendor's proper name here. If Assyst Accounts Payable is in use, this is the name which will appear on cheques written to the vendor.

Contact – If a specific representative of the vendor has been assigned, the name of that person may be recorded in the Contact field.

Phone – Key in the vendor's telephone number. Note that this field is limited to 12 characters. The most common format used in the entry of telephone numbers uses two hyphens.

Address1, Address2, Address3 – The labels on these fields may vary depending on the field label settings in Assyst Point of Sale. The three address lines may be used to record the street, PO Box, and/or City and Province of the vendor.

Postal Code – Key in the six character postal code for the vendor or 5 character zip code for American addresses.

General Vendor Settings

On the General tab of any vendor record are a group of other commonly utilized settings to determine how activities involving the selected vendor are handled.

All of these fields are optional.

Email – If applicable, key in the vendor's or vendor rep's email address. Purchase orders may be emailed in PDF format to vendors who accept orders via email.

Fax # – Key in the vendor's fax number. This option is limited to 12 characters, and is often entered using two hyphens.

Type – Applies to users of Assyst Accounts Payable, this option may be used to select vendors by type for reporting purposes.

Terms – Applies to users of Assyst Accounts Payable only, this option may be used to define standard payment terms offered by the vendor.

Status – This option applies only to licenced users of Assyst Accounts Payable. For more information about this option, consult the Assyst Accounts Payable User Guide.

Default G/L Dist – This option applies only to licensed users of Assyst Accounts Payable. For more information about this option, consult the Assyst Accounts Payable User Guide.

At the bottom of the General tab are fields which may contain summary details of account activity. These fields will only display correct values for licensed users of Assyst Accounts Payable who perform the necessary maintenance.



Communication Settings

Some vendors and/or banners may require special settings in order to properly integrate with electronic content such as catalogs, ordering programs, and/or imports of electronic invoices and promotion files.

The Communications tab contains basic settings for order automation and electronic transmission.

The screenshot shows the 'Communications' tab of a software interface. It contains several input fields and checkboxes:

- Modem #:** An empty text box.
- Speed:** An empty text box.
- Comm. Format:** A dropdown menu currently showing 'TD - Amerisource Bergen'.
- Buy Direct:** An unchecked checkbox.
- Min. Buy \$:** A text box containing the value '0'.
- Buying Cycle:** A text box containing the value '0'.
- Confirm:** An unchecked checkbox located below the Comm. Format dropdown.

 The interface also shows other tabs: 'General', 'Additional Info', 'Account Detail', and 'Account History'.

Modem # – If communicating with the vendor via modem, key in the telephone number assigned to the vendor's modem.

Speed – If communicating with the vendor via modem, key in the baud rate to be used for the modem connection.

Comm. Format – Select the appropriate vendor type from the list. If unsure of the correct setting, or if configuring a new vendor for electronic content or communication such as the receipt of electronic catalogue updates, invoice downloads or purchase order uploads, contact the Support team at TELUS Health for further guidance.

Confirm – More information about this option will be made available in a future version of this user guide.

Buy Direct – If the vendor record selected is a direct-seller (such as Procter & Gamble) rather than a distribution warehouse (such as McKesson or Kohl & Frisch), they may require a longer lead time to provide products. Selection of the Buy Direct option will lead to longer lead time defaults being used for orders involving the specified vendor.

Min Buy \$ – More information about this option will be made available in a future version of this user guide.

Buying Cycle – More information about this option will be made available in a future version of this user guide.

Additional Info and Settings

The Additional Info tab contains further settings relevant to the processing and preparation of electronic content to and from vendors' servers such as catalogue updates, electronic invoices, promotion downloads and purchase order uploads.

Vendor Specific – If the vendor record is configured to communicate electronically, additional settings may be required and are contingent upon the selection of the Comm. Format option in the Communications tab. For more information about Vendor Specific settings, please contact the Support team at TELUS Health or consult the electronic transmissions supplemental user guide applicable to the vendor.

Comm Store # – This field may be set to contain the store's alpha numeric account number with the vendor. Where a vendor is not communicating electronically, this detail will appear on hard copies of the purchase order.



Narcotic ID – For sites ordering narcotics through the Point of Sale, it may be possible to set a default narcotic ID code on the vendor file. Note that this does not apply to all vendors, and further information may be required when uploading an order to the vendor's ordering system.

E-Mail Address / E-Mail Subject / Email Host – The email settings contained herein may be used to record a vendor's email address. Some vendors may require specific settings for the Subject and Email Host to ensure proper transmission and processing of the order, though these options are no longer widely used. For more information about these options, contact the Support team at TELUS Health.

Misc. Promo File Layout – Some vendors and/or banners may need to be configured to facilitate the import of promotions using a specific file format.

Misc. P/O File Layout – Some vendors who support electronic transmission of orders may require modification of the content to fit a standard format.

NOTE: For both Misc. File Layout options, the default setting will suffice for most vendors. If errors result from attempts to import promotions or transmit orders to vendors, please contact the Support team at TELUS Health for further guidance.

Duplicate UPC's on PO – If a single product may appear on a purchase order on more than one line, select this option. This option is typically selected by stores using the Assyst Home Medical Equipment module. Users of Assyst Point of Sale without this module would typically leave this option turned off.

Check Catalogue (P/O) – If the vendor supports electronic catalogues, items added to purchase orders will be subject to confirmation of order numbers.

P/O Sequence – Select the default sort sequence to be applied to items listed on purchase orders to this vendor.

Account Detail / Account History

These will only display details for licensed users of Assyst Accounts Payable. For more information about these tabs, please consult the Assyst Accounts Payable user guide.



Emailing a Vendor

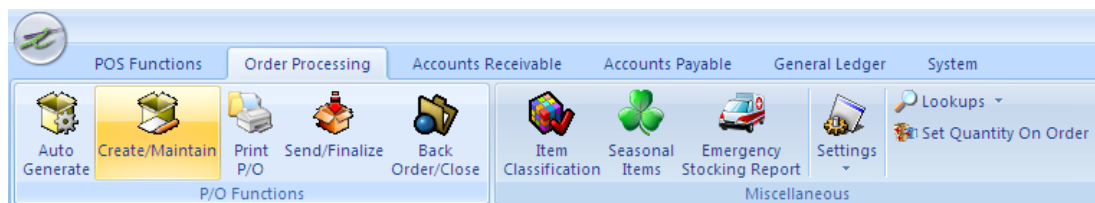
To generate an email to the vendor, click on the  icon. An email will be created using the email address of record for the vendor.

This function requires the installation of Microsoft Office Outlook.

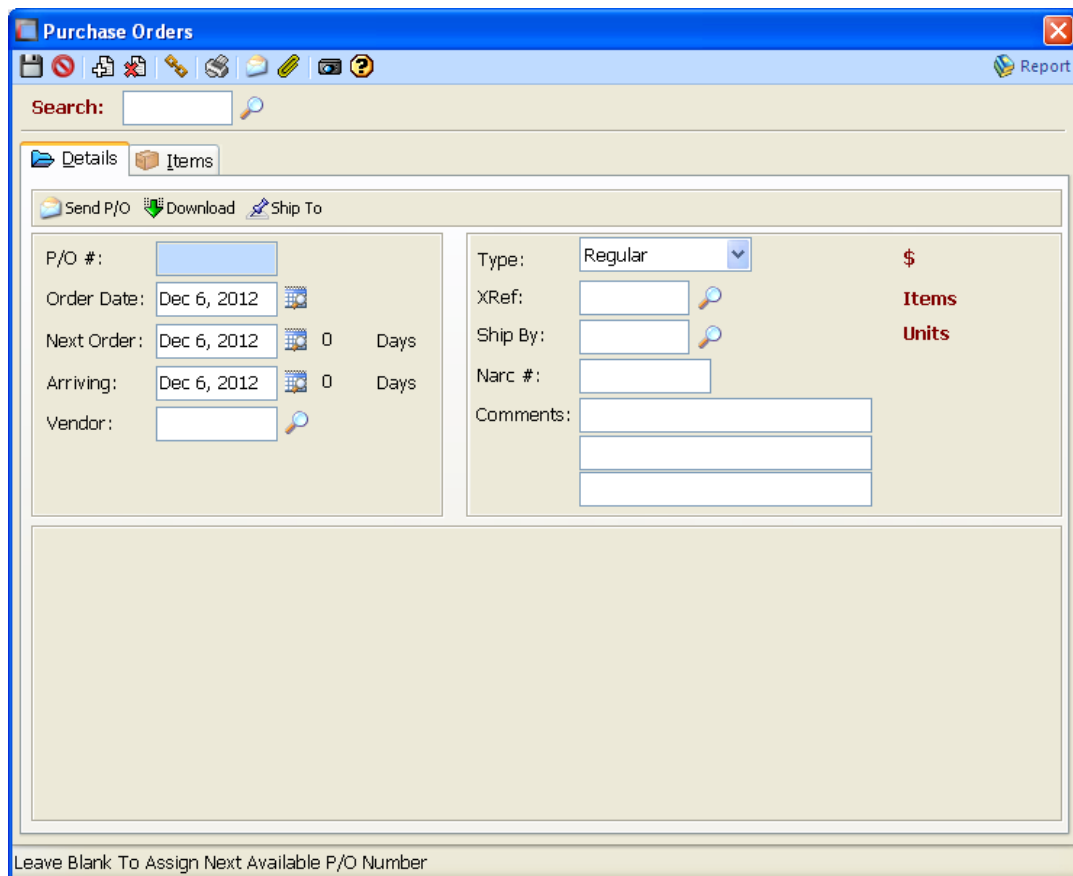
Basics of Ordering

Manual Order Creation

Purchase orders may be created manually in Assyst Point of Sale by selecting Create/Maintain from the Order Processing ribbon group.



A new, manually generated purchase order may be created by clicking on the  Add New button.


 A screenshot of the 'Purchase Orders' application window. The 'Details' tab is active. At the top, there's a search bar and a 'Report' button. Below the tabs, there are buttons for 'Send P/O', 'Download', and 'Ship To'. The main form area contains several input fields:

- P/O #:** A text box.
- Order Date:** A date picker showing 'Dec 6, 2012'.
- Next Order:** A date picker showing 'Dec 6, 2012' with a '0' in a box next to it and the word 'Days'.
- Arriving:** A date picker showing 'Dec 6, 2012' with a '0' in a box next to it and the word 'Days'.
- Vendor:** A text box with a magnifying glass icon.
- Type:** A dropdown menu set to 'Regular'.
- XRef:** A text box with a magnifying glass icon.
- Ship By:** A text box with a magnifying glass icon.
- Narc #:** A text box.
- Comments:** Three stacked text boxes.

 To the right of these fields are labels: '\$' for currency, 'Items' for the item list, and 'Units' for the unit list. At the bottom of the window, a note reads: 'Leave Blank To Assign Next Available P/O Number'.


Common Settings for All Order Types

Once the purchase order has been created, the Details tab will be available for modification. The following fields must be set for all orders.

P/O # – If the system is to assign a purchase order number, press Tab or click on another field to have the system fill in the next available purchase order number.

Order Date – By default, this date will be set to use the date on which the purchase order is created. If another date is to be used, key in the date here or use select a date from the Calendar.

Next Order – For ordering systems which use prior sales information to forecast inventory/reorder requirements, the Next Order date may be important. If known, the date on which the next order is expected to be sent to the vendor for the products listed may be set here or selected from the Calendar.

Arriving – For stores using automated ordering functions, the Arriving date on any order is very important. Assyst Order Processing may be configured to ignore orders when calculating product needs which are set to arrive more than a certain number of days into the future.

 **NOTE:** If your store is not using any type of automated ordering, the Next Order and Arriving dates are for information only.

Vendor – Key in the code attached to the vendor to whom the order is being sent. If the vendor code is not known, use the lookup icon to find the desired vendor code.

Optional Order Settings

Further options are available in Assyst Order Processing to facilitate the efficient creation and processing of purchase orders. These settings may not apply to all orders and may be skipped where not applicable.

Type – Select whether the order types is to be Regular, Call For Order, or Sale. The default setting is Regular. For some vendors or situations where a promotion is to be imported, it may be necessary to set this option to something other than Regular.

 **NOTE:** For more information about specific scenarios, consult the Electronic Transmissions Supplemental User Guide applicable to the selected vendor and/or the banner to which your store belongs.

XRef – This option is used in conjunction with electronic vendor promotion files. If applicable, the filename for the electronic promotion file may be entered in this field or selected from the lookup.

Ship By – Key in the code for the desired shipping method to be used for the order or select it from the lookup.

Narc # – If narcotics are included on the order, the narcotic number may be keyed into this field. Note that some vendors whose systems support electronic order transmission will disregard the contents of this field in favor of other means of verifying authorization to purchase narcotics.

Comments – The comments field may be used to key in general notes regarding the order, and will print on a physical copy of the purchase order and/or a PDF attachment. Comments are typically ignored by vendors to whom orders are transmitted electronically.



Alternate Ship-To Addresses

If the order is to be drop-shipped to an address other than the store's regular delivery address, click on the  Ship To button to access a space wherein an alternate ship-to address may be specified.

Therein, it is possible to specify an alternate Ship-To address for the order.

Order Details – Special Considerations

It is noteworthy that not all optional fields available in the Create/Maintain screen will be sent to all vendors.

Vendors whose systems support electronic ordering have specific requirements. These requirements vary from vendor to vendor and are developed independently of TELUS Health.

Many of the fields available on the Details tab in a purchase order are specific to the operation of the Order Processing module in Assyst Point of Sale, such as the Next Order and Arriving dates. As such, these fields will be omitted from all electronic orders as they are not considered relevant to the vendors.

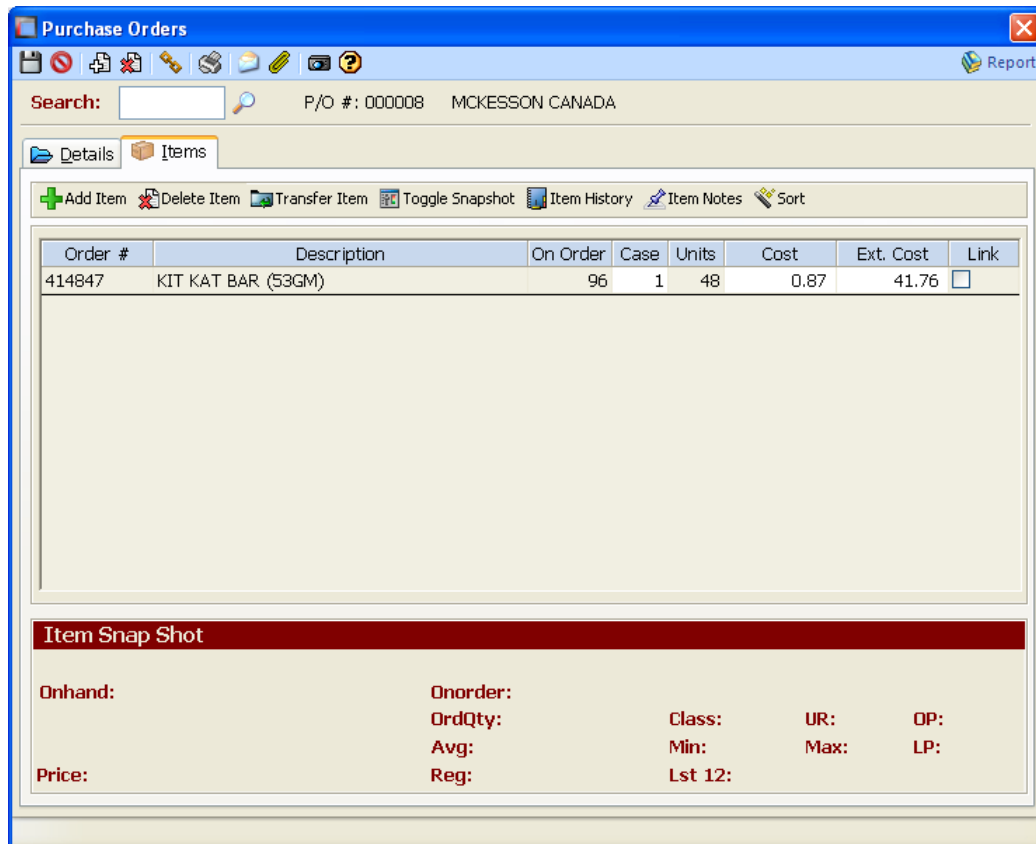
The contents of many fields will be visible on printed copies of purchase orders created in Assyst Point of Sale. This rule also applies to purchase orders to be sent via PDF attachment using Microsoft Office Outlook.

Reviewing or Adjusting Items on an Order

Items may be Added, Deleted, or adjusted from the **Items** tab within any order.

If the order, whether created manually or using Auto Generate, contains items, clicking on the Items tab will display the list of products on the order.

If the order contains no items, the system will automatically display an item lookup window.



Purchase Orders

Search: P/O #: 000008 MCKESSON CANADA

Details **Items**

+ Add Item - Delete Item Transfer Item Toggle Snapshot Item History Item Notes Sort

Order #	Description	On Order	Case	Units	Cost	Ext. Cost	Link
414847	KIT KAT BAR (53GM)	96	1	48	0.87	41.76	☐

Item Snap Shot

Onhand: Onorder: Class: UR: OP:

Price: Avg: Min: Max: LP:

Reg: Lst 12:



Click on the **Add Item** button to launch the item lookup and search for products by UPC, wholesaler # or description.

Click on the **Delete Item** button to remove the selected item from the order.

Click on the **Transfer Item** button to move the selected item to another purchase order.

Click on the **Toggle Snapshot** button to toggle whether the snapshot for the item or the underlying customer's order is displayed.

NOTE: Toggle Snapshot is only useful to locations where the Home Medical Equipment module or the GT Ordering module are in use.

Click on the **Item History** button to review the item's recent activity. This is the same data available in the History button in Item Maintenance, made directly available as a shortcut to verifying the need to order additional units of specific products for resale.

Click on the **Sort** button to re-sort the items on the purchase order.

Using the Item Snapshot

The Item Snapshot at the bottom of the screen contains details about the highlighted item.

The screenshot shows the 'Purchase Orders' application window. At the top, there is a search bar and a status bar showing 'P/O #: 000008' and 'MCKESSON CANADA'. Below the search bar are tabs for 'Details' and 'Items'. The 'Items' tab is active, displaying a table of items. The table has columns: Order #, Description, On Order, Case, Units, Cost, Ext. Cost, and Link. The third item, 'KIT KAT BAR (53GM)', is highlighted. Below the table is the 'Item Snap Shot' section, which displays details for the selected item (598033).

Order #	Description	On Order	Case	Units	Cost	Ext. Cost	Link
176974	TYLENOL CAPLETS (24EA)	3		5	2.70	13.50	☐
4114847	KIT KAT BAR (53GM)	96	1	48	0.87	41.76	☐
984456	PANTENE PRO-V TEXTURIZE! MOUSS (150G	0		1	4.87	4.87	☐

Item Snap Shot							
598033							
Onhand: 122	Onorder: 96						
	OrdQty: 48CASE		Class: 0	UR: 0.0	OP: 0		
	Avg: 0.82		Min: 100	Max: 200	LP: 0		
Price: 0.99	16.7	Notes!	Reg: 0.87	Lst 12: 369	30.8	Jan 31, 2013	

The product's **UPC** code, **Onhand**, **Price** and **margin percentage** appear towards the left. It is also between the margin percentage and the cost details that the presence of **Notes** will be indicated. In the provided illustration, this appears just to the left of the **Regular Cost**, which is labeled as Reg.



Additional details listed in the snapshot include information about the product's sellthrough and current on-order quantities to help audit the purchase order's accuracy before sending.

For example, in the above illustration the highlighted item was **last sold** on January 31, 2013. In the **last twelve months** (labeled sa Lst 12), 369 units have been sold. The product's **reorder information** is indicated including **Class**, **Usage Rate (UR)**, **Order Point (OP)**, Min, Max and **Lead Point (LP)**. **Costs** are also listed beneath the **OrdQty** which indicates, in this case, that the product is ordered in cases of 48 resaleable units.

Users of Assyst HME may toggle the snapshot using the **Toggle Snapshot** button to review information about specific customers for whom the product has been ordered.

Additionally, for sites using the GT Ordering module for management of inbound customer orders, the snapshot may be toggled to show the details of individual customers' orders relevant to each line item.

Item Notes

Within a purchase order, it is possible to add or review notes by clicking on the Item Notes button.

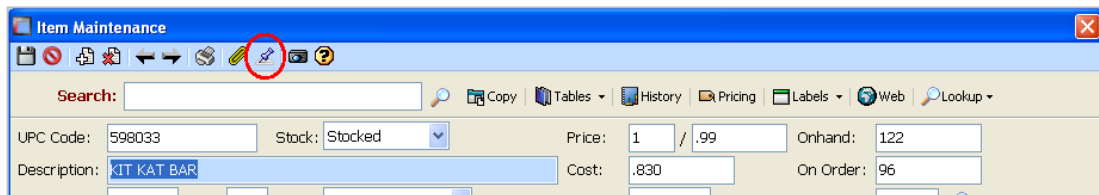
Notes added using the Item Notes option within a purchase order will apply to the item as applicable to the current purchase order only. Available note types are:

Note – Indicates an internal note which will not print on a physical purchase order

P/O – Indicates a note which will print on a physical purchase order

To add a purchase order note that will recur on all purchase orders for the item, a P/O type note may be added from the item record in Item Maintenance. Click on the **Zoom** button to access the full Item Maintenance record for a highlighted product.

NOTE: In Item Maintenance, the Item Notes icon is available in the toolbar at the top of the window.



For more information about using the Notes feature in Assyst Point of Sale, please consult the Basics User Guide.

Purchase Order Attachments

In many cases, it is advantageous to record details of purchase orders that may not be already available in the electronic records retained by Assyst Point of Sale. Examples may include fitting sheets for custom medical appliances and configuration sheets for custom-ordered products such as wheelchairs, lifts, and other more complex products.

The optional Attachments module may be used to attach files such as scanned graphics, PDF documents, and other details to the purchase order for easy reference.

Click on the Attachments icon  to attach a digital document to the purchase order.

If you do not have a license for the Attachments module, contact your account representative for more information.



Finalizing a Purchase Order

A purchase order may be modified up until the moment it is finalized or and/or sent to a vendor.

Where referring to a vendor whose system supports electronic order transmission such as McKesson, Kohl and Frish, AmeriSource Bergen and others, the same process will create the necessary transmission file and, in some cases, send the order.

For more information about electronic order transmission, consult the Electronic Transmission Supplemental User Guide applicable to your vendor(s).

Why Finalize a Purchase Order if it can not be modified?

Most vendors will not accept in any way, shape or form duplicate purchase order numbers. If a purchase order is transmitted, faxed, or emailed to a vendor, and a second purchase order with the same number appears, the second revision of the purchase order may be rejected to ensure:

- Orders are not duplicated
- Orders are filled as received
- Orders are processed in a timely fashion without the need for subsequent revisions/repicking

When a purchase order is finalized, the intention is to indicate that the order is either ready to send to the vendor OR that the purchase order as exists in the system has already been sent. Thus the purchase order may not be modified thereafter to avoid potential complications from resending a purchase order more than once.

Finalizing an order also updates the On Order quantities in Item Maintenance for any products contained on the purchase order.

Method One: Finalize a Single Purchase Order

While in the Create/Maintain Purchase Order window, with a purchase order selected for display, click on the **Send P/O** button on the **Details** tab.

The system will display a window such as the one displayed on the left. Note that the vendor and purchase number to be finalized is displayed onscreen.

Additional purchase orders to be sent or finalized to the vendor may be selected at this time, though generally this procedure is used to send a single purchase order. Only purchase orders relevant to the selected vendor may be selected in this screen.

Purchase order numbers may be keyed into the **Send P/O #** field. Click on the **Add to P/O List** button to add the selected purchase order.



The lookup is available to aid in selection of one or more purchase orders for inclusion in the Send or Finalize function.

Click on the **Send / Finalize** button at the lower right of the window to finalize the selected purchase order(s).

Method Two: Send/Finalize from the Ribbon

If you are not already in the purchase order(s) that you wish to transmit, it may be more efficient to finalize purchase orders from within the **Send/Finalize** menu option on the ribbon.

Clicking on this button will display a screen very similar to the one displayed above, with the exception that no vendor will be pre-selected nor will any purchase order numbers appear in the list at the right.

First select the **vendor** to whom orders are being finalized.

Then select the **purchase order(s)** to be finalized, clicking on the **Add to List** button after either looking up or keying in the desired P/O numbers.

Click on the **Send / Finalize** button at the lower right of the window to finalize the selected purchase order(s).

Finalizing Orders to Vendors Supporting Electronic Ordering

Where a vendor is configured for electronic ordering, finalizing an order causes one of the following to occur:

- A confirmation screen may appear indicating that the order was transmitted successfully
- A confirmation screen may appear indicating that the order was transmitted successfully along with the successful retrieval of available vendor-provided files such as catalog updates and/or invoices
- A confirmation screen may appear indicating a file name to be transmitted to the applicable vendor

The results will vary by vendor, as each vendor's requirements for order processing differ somewhat.

If a confirmation screen provides a file name for transmission, additional steps must be undertaken to send the order to the vendor. For more information, consult the Supplemental Electronic Transmissions User Guide for the applicable vendor.

After An Order Is Finalized

Finalized orders may show one of two status indicators:

Finalized – Indicating that the order was to a vendor not, at the time, configured for electronic ordering and was finalized

Transmitted – Indicating that the order was finalized and was either transmitted or prepared for transmission to a vendor that supports electronic ordering

Purchase orders may also be **emailed** using the **email** icon on the toolbar at the top of the Create/Maintain Purchase Order window. The email draft will be created in Outlook and may be modified to add text to the body of the email, recipients, additional attachments, and other content as appropriate.

The email will automatically have a PDF copy of the order attached and the "To:" field of the email will be filled in if the vendor's email address is on file in Vendor Maintenance.

■ **NOTE:** This function requires Microsoft Office Outlook to be installed and configured on the Windows workstation from which the email is to be sent. A suitable PDF printer program such as Bullzip PDF Printer must also be installed and configured properly to automate attachment of the PDF.



Printing a Purchase Order

Individual purchase orders may be printed from within Create/Maintain Purchase Orders once a purchase order has been loaded. Click on the **Report** button to print the purchase order directly from this screen.

Purchase orders may also be printed from the **Print P/O** function on the toolbar. See the section entitled **Purchase Order Reporting** for further details.

Emailing a Purchase Order

Purchase orders may be sent via email in PDF format to vendors configured in Assyst Point of Sale. This is typically utilized by vendors who do not support electronic order processing.

Click on the  icon within the Create/Maintain window for the purchase order to generate the email. By default, the vendor's email address will appear on the order along with a PDF attachment containing the purchase order.

The use of this function requires the installation and configuration of a PDF printer program such as Bullzip PDF Printer AND Microsoft Office Outlook. For more information about the configuration of Bullzip PDF Printer for use with this function, please contact the Support team at TELUS Health.

Closing Purchase Orders

After product from a purchase order has been received, it is important to mark the purchase order(s) affected as Closed.

This ensures that the products in the “on order” field are removed from “on order”. Additionally, if receiving by purchase order, any products not received may be marked as still on order using the backorder creation function which is part of the closing process.

While receiving by purchase order, closure is prompted at the end of a finalized receiving session and need not be completed again if performed at that time. Receiving of finalized, received or transmitted purchase orders by keyboard or invoice requires the extra step of closing the purchase order.

Why isn't it always automatic?

Because when receiving by keyboard, there is no cross-reference to the purchase order. When receiving by invoice, many vendors may mix up multiple P/Os on a single invoice or split a single P/O over multiple invoices which complicates possible cross-references.

This step ensures that purchase orders are not closed prematurely by the system, giving users control of that function.

How to Manually Close a Purchase Order

If you did not close a purchase order when it was received, you may close it by selecting the **Back Order / Close** button on the ribbon.

The system first requires the selection of the range of purchase order numbers to be closed. Only valid purchase order numbers may be selected.

Next, check off the boxes for the purchase order status(es) to be closed within the specified range.

Click on the Continue button to close the selected range of purchase orders.

Create Back Order

The create Back Order function is designed to be used for products received by P/O. This option is intended for use with purchase orders with the status of Received only.

If a purchase order has been received, the receiving session finalized, and not all items have a receive quantity identical to the ordered quantity, the system may close the original purchase order and migrate any unreceived products to a new “back order” P/O.

The back order P/O will show a reference in the comments to the original purchase order. No items received from the original purchase order will appear on the back order P/O excepting those which were not received in the expected quantities.

NOTE: Use of the Create Back Order option for orders received by Keyboard or Invoice will lead to erroneous duplication of P/Os in their entirety.



Purchase Order Reporting

Print P/O

The **Print P/O** option, found on the **P/O Functions** panel in the **Order Processing** ribbon group, may be used to print either detailed copies of one or more purchase orders or a more generalized report listing purchase orders.

The following section details the settings available for purchase order reports:

Report Type – Select Item Detail to print multiple purchase orders, or select Summary to print a summary list of P/Os which match the search criteria.

Ranges – Select the start and end ranges for purchase order numbers, dates and/or vendors to narrow the results of the report. By default all purchase orders from all vendors will be printed.

NOTE: The Date range, for the Summary version, requires a number of days from the current date back rather than actual dates to be defined. This is often used as a means of finding older P/Os that have not yet arrived.

The following settings are available only in the Item Detail report type:

Print Sequence – This option may be selected to determine the order in which items will appear on the purchase order(s).

of Copies – This option indicates how many copies of each individual P/O are required.

Display Remarks – This option will show the applicable item notes and/or remarks on the printed purchase order(s).

Item Movement Report – Selecting this option will result in the creation of an Item Movement report listing the monthly sellthrough for each item contained on the P/Os selected for print. This report prints in addition to copies of the selected purchase order(s).



Print UPCs – Select this option to show the UPC barcode numbers for each item on the printed purchase order(s).

The following setting is available only when the P/O Summary report type is selected:

Status(s) Included – If a Summary report is selected, one or more statuses may be selected for inclusion in the report. Select either All to include all purchase orders or the individual status options desired in the available five optional fields.

Click on the **Continue** button in the lower right corner of the window to print the selected report (s).

Emergency Stocking Report

The Emergency Stocking report is meant to examine recent sales activity from the sales journal and, using those details, identify any products on which stock levels are too low.

This report is an excellent tool to help identify products which are in need of reorder independently of their regular ordering limits. This can occasionally occur where stock levels are critically low and/or where there has been a sharp increase in demand for certain types of products.

By default, this report examines all items sold within a specific timeframe. However, it is possible to use the **Ranges** to limit products by their assigned categories, onhands, or other applicable settings.

Report Sequence – This setting determines the order in which products with critically low stock will be printed. Options include various combinations of item category, manufacturer and vendors as primary and subsidiary sort sequences.

Base on Last # of Days – This setting may be used to determine how many days of sales history will be examined to calculate the days' supply of products available for sale based on recent sellthrough

Days Supply Required – Based on the per-item days' supply calculated for the "Last # of Days", the system will report any products found to have insufficient stock to meet demand for the number of days specified in this field.

For example, in the illustration above, the system will produce a report of products sold during the last 10 days for which there is not sufficient stock to meet the projected demand for at least 5 days.

The report may be displayed on the **Screen** or sent to the **Printer**. Click on the **Print** button after customizing all relevant report settings.



Appendices

Appendix A – Order Settings

The settings detailed herein refer only to those relevant to manual ordering. Settings relevant to order automation are detailed in the Automated Ordering User Guide.

Typically, these settings are configured for users by TELUS Health Support and Implementation team members in accordance with the wishes of management. These settings should remain as set unless settings changes are required by management.

The screenshot shows the 'Ordering Parameters' window with the following settings:

- Options:**
 - Direct Order Entry DOE: 0
 - Next P/O Number to Use: 12
 - Default Calculation: 1 (MIN/MAX ORDERING)
 - Ignore PO's Arriving After: 14
 - P/O Print Format: Portrait
 - Default Ordering Cost: Regular
 - Default Excpt Vendor Id: < NOT SET-UP >
 - ☒ Update Item OnOrder
 - ☒ Generate P/O by Vendor
 - ☐ Allow Edit of Ext. Cost
 - Disclaimer Print button
- Use Gord Graham Ordering:** ☐
 - Direct Lead Time (Days): 0
 - Safety Percent: 0
 - Warehouse Lead Time (Days): 0
 - Safety Percent: 0
 - 'Out of Stock' Days: 0
- Fields No Longer Used:**
 - Communication ID: [Empty]
 - Customer Number: [Empty]
 - Mail Subject: [Empty]
 - Mail Address: [Empty]

Direct Order Entry DOE – More information about this option will be made available in a future version of this user guide.

Next P/O Number to Use – This option indicates the next available purchase number. When creating a new purchase order, this number will be incremented by 1 after each new P/O number is assigned.

P/O Print Format – This is typically set to Landscape to print purchase orders suitable for faxing to vendors. Setting this option to Portrait will result in P/Os printing in a generic report format.

Default Ordering Cost – Select whether the cost to be used by default on new purchase orders is an item's Average, Current or Regular (catalog) cost.

Update Item OnOrder – Select this box if finalizing purchase orders is to result in an update to items' On Order fields.



Allow Edit of Ext. Cost – Select this option to allow extended costs to be directly modified by users while creating or modifying a purchase order.

Disclaimer Print – Click on the Disclaimer Print button to set a disclaimer that will appear on all printed copies of purchase orders. This option is only applicable if the P/O Print Format is set to Landscape.

Appendix B – Frequently Asked Questions

My On Order keeps going up for all the products I get in. How do I stop this?

This typically indicates that purchase orders are not being properly closed off. Use the Back Order/Close option to close any purchase orders for which product is no longer outstanding.

I want to order from my vendor electronically. How do I do this?

Because each vendor's requirements for electronic ordering differ, user guides are available for each supported vendor. These user guides detail the usage of electronic orders, catalog updates, and receiving by invoice. Electronic ordering is presently an optional module not available with all versions of Assyst Point of Sale.

For more information, consult with a member of the Support team at TELUS Health and be prepared to advise our agents which vendor you are inquiring about.

Does your system support automatic ordering?

Yes, Assyst Point of Sale supports automatic creation of purchase orders based on user-defined minimum and maximum onhand values, sales history-based order calculations and Gord Graham Ordering (often referred to as E.O.Q. or economic order quantity ordering).

This functionality is available with some versions of Assyst Point of Sale and is detailed in the Automated Ordering User Guide.

If I use automatic ordering do I get a chance to confirm my orders before they're sent?

Yes. The system creates the orders, and they remain in a state which allows for modification prior to transmission. Special order items may be manually added to such purchase orders, order quantities may be revised and unwanted items may be removed from P/Os before they are sent.

Where do I set up a new vendor / modify a vendor?

Vendor Maintenance functions may be found in the Settings dropdown menu. If you have the Accounts Payable module, or access to the module, Vendor Maintenance may also be accessed from the Accounts Payable ribbon group.

Can I use a handheld with Assyst Point of Sale to order product and track P/Os?

Yes. Assyst Point of Sale is compatible with a few models of handheld unit. For more information, contact the Support team at TELUS Health or your account representative.

What are Item Classification and Seasonal Items used for?

These functions are used in conjunction with automated ordering functions which use sales history and/or EOQ ordering methodologies. For more information, consult the Automated Ordering User Guide.



Appendix C – Report Samples

P/O Summary

January 17, 2014		Telus Health Solutions			Page 1
PURCHASE ORDER SUMMARY					
P/O #	Vendor	X Ref. Date	Items	Dollars	
375	KNF	13/01/01	12	124.12	
376	MCK	13/01/02	74	986.40	
377	ABCC	13/01/10	3	22.47	
384	INVACARE	13/01/21	14	7382.14	
# of P/O's		4	Items:	103	Total: \$8515.13

Emergency Stocking Report

FEBRUARY 21, 2013 16:14 A Demo Pharmacy			PAGE: 1					
Emergency Stocking Report								
BASED ON SALES FROM 13/01/22 TO 13/02/21			10 DAY SUPPLY REQUIRED					
UPC CODE	DESCRIPTION	SOLD	ONHAND	SUPPLY	VENDOR	ITEM #	VENDOR	ITEM #
Department: 2011-ANALGESICS								
6210700134	ANACIN EX-STRENGTH DL	2	0	0.0	MCK	010294	EAST	010294
6458900192	LENOLTEC NO. 1	97	14	4.5	MCK	805002	PROC	019305
6454130579	MOTRIN JUNIOR STRENGTH TABLETS	1	0	0.0	EAST	110296		
6454130251	TYLENOL ARTHRITIS PAIN CAPLETS	6	1	5.2	MCK	667923	EAST	266676
6260014205	TYLENOL DROPS CHERRY	2	0	0.0	MCK	953315	PROC	504556
6454131492	TYLENOL ES RAPID RELEASE GELCP	2	0	0.0	MCK	934653	EAST	420885
6260014214	TYLENOL JR GRAPE TABLETS	2	0	0.0	MCK	124495	PROC	601799
10360 RECEIPTS CHECKED		7 ITEMS:	112					



Sample Printed (Landscape) P/O

Page: 1



2305 Hanselman Place
Saskatoon, SK S7L 6A9
Ph: (888) 561-6555 Fax: (306) 664-4994
Web: www.telushhealth.com

PO # 291

Ordered By: _____

Date: 140106

SUPPLIER INFO:

KOHL & FRISCH
234 MY STREET
TORONTO, ON, M5M5M5
Fax: 416-555-1212
Ph: 905-555-1212

SHIP TO:

Telus Health Solutions
2305 Hanselman Place
Saskatoon, SK S7L 6A9
Fax: 306-664-4994
Ph: 306-242-2770

SHIP VIA:

PREPAID: ☐
COLLECT: ☐

ADDITIONAL SHIPPING INSTRUCTIONS:

TERMS:

DISCOUNT STRUCTURE:

ORDERED FOR PICKSLIP:

COMMENTS:

QTY	UNIT/TAX	SUPPLIER ITEM #	IN-STORE PROD #	UPC CODE	DESCRIPTION	NET/UNIT	NET TOTAL
4	EA B	771543		6454130808	TYLENOL 8 HOUR CPLT (72)	8.23	32.92
4	CA G	414847	PRODIDHERE	598033	KIT KAT	.62	29.76

THIS IS AN ORDERING DISCLAIMER.
YOU HAVE FOUR LINES TO TYPE IN A STANDARD DISCLAIMER, AND
THESE ARE FULLY CONFIGURABLE AND CONTAIN A GOOD DEAL OF INFO
TO YOUR VENDORS.

SUBTOTAL: 62.68

EST. SHIPPING: .00

HST: .00

TOTAL: 62.68

AUTHORIZED SIGNATURE