

Update Features

March 2016

Version 04.15

Build 042



TELUS | HEALTH
Assyst Point of Sale

What's New?

Hyperlinks are now being used in the Update Features list. An underlined title in the What's New section will identify the text as a hyperlink. Clicking on the selected hyperlink will move the cursor to a section in the document for more detailed information.

Assyst Point of Sale

The [Wireless Handheld](#) has been updated.

[Application Changes](#)

We have made some changes within the application to enhance certain functionality.

Home Medical Equipment (HME)

Order Entry has had a [Return](#) Button added.

Changes have been made to the [Shipping](#) process.

An additional feature has been added to the [Templates](#) in HME.

Assyst-POS Enhancements

Integrated Debit/Credit

JCB and Discover cards have been added to the Tender selections, the till and the debit/credit log.

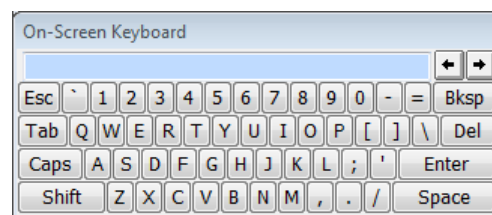
General Ledger

A posting date will now be stamped on all GL batches. This new date will be the current date of the batch creation. When POS adjustments batches are created, (and the title changed) the link between the batch and the report was severed. This new date will now be used as an identifier instead of the title. This date is visible only in Batch Lookup, and displays in the bottom right corner of the window.

Wireless Handheld

The Wireless Handheld has a new look. Icons have now replaced the old menu selections. The handheld can be used for both POS and Rx-A and now checks for integration between the POS and Rx-A. If there is integration, the Rx-A Functions radio button will be enabled for access to the Rx-A Stock Count Function.

A  keyboard icon has been added in both Point of Sale and Rx-A. In POS Item Maintenance, this makes it easier to use the pen to type in descriptions. In Rx-A, this can now be used to enter initials and password. The ESC key will close the keyboard window.



To access the new features, the software needs to be at Version 414 Build 0062. Windows servers need a configuration change made on their RDP connection. For stores with a Unix server, the handheld will need to be sent in to be reconfigured from a telnet connection to an RDP connection.

Application Changes

Additional End of Day Reporting

The Run Before Totals Clear flag is now saving correctly.

The Inventory Analysis Report will now only print the UPC codes when the check box is checked.

Accounts Payable

With manual cheques set for a separate batch, a cheque run will now be completed without a status 92/00 when the User has both regular and manual cheques in a single cheque run.

Accounts Receivable

Customer Statements can once again be printed to the screen.

Customer Notes will now transfer when two customer accounts are merged. Invoice notes will also transfer.

History Statements will now include all accounts according to the ranges selected.

A single statement will now print correctly (from customer maintenance) to a PDF printer.

Attachment Report

The end date lookup button will now function as selected and will also save correctly.

Catalogue – McKesson

The leading check digit for Atoma (McKesson generic brand) will be stripped out when receiving items by invoice.

Information Panel

Access to the Graph Tab (on the Information Panel) can now be controlled by user.

Item Maintenance

When an item is coded as a Serialized item, the Date and User in the Modify History screen will now display on separate lines.

A bleed through (when switching tabs) with catalogue information has been corrected.

When the UPC code is changed on an existing item to a UPC that also already exists, an Invalid UPC prompt will display. When OK is clicked, the UPC code will revert back to the UPC code before any changes were made.

Item Quick Maintenance

The Price Table lookup button and the F12 keyboard shortcut will now work for items that are on a price table.

General Ledger

When releasing budget batches (with the bank account included) these entries will no longer be written to the bank reconciliation.

With GL locks turned on, and a manual batch is created, the source field is limited to 10 through 19.

Inventory Valuation Report

The column headings will now align with the data results.

Loyalty Club

A new discount flag has been added. If an item is flagged as Non Discountable in item maintenance, the loyalty will not discount the item, as well.

Loyalty Card Maintenance

The birthdate and the patient province will now auto-populate when pulling from Rx-A Patient file.

The Next/Previous buttons will now function as expected.

A status bar has also been added.

Purchase Orders

The User will no longer get a 'File Record in Use' error when finalizing the order, if there is an item on the order where the catalogue UPC was the same as the related UPC.

Receiving Report (with rebates)

A new column was added in the total line called Rebates. This amount is subtracted after the taxes were added to the main invoice, so that the final totals match.

The receiving interface (from AP) will again allow for the vendor to be modified or deleted.

Receipt Exception Report

When running this report to get skim totals, these totals will display with the complete receipt selected.

Shelf Labels

To be able to create a label without adding the item in item maintenance, a new Modify button has been added to the toolbar.

The number of labels to print (when downloading from the handheld) will now display.

Vendor Maintenance

The additional tab has been modified to clearly define the POS and Rx-A flags.

The Receive By flag will be the default setting, but can now be overridden during the receiving session.

The "Check catalogue PO" flag will now update the order number and the order quantity.

Vendor – CariMed Only

The warehouse location has been added to the catalogue file and to the purchase order. This new field will be sent with the purchase order to the warehouse.

The purchase order will now include the phone number from the Pharmacy Settings.

The addition of the Pharmacy Name in the SFTP settings will now allow each pharmacy to download their own invoices.

The narcotic prompt has been removed for CariMed only.

When a tilde is in the item description, this tilde will be treated as a space.

When requesting electronic invoices files, both Front Store and Pharmacy will be downloaded.

Vendor – Kohl and Frisch

A new option has been added in the vendor specific options under additional information in vendor maintenance. This will now allow KnF sites to pull down invoices based on PO number, Order number or invoice number.

Assyst-HME Enhancements

Templates

Items can now be selected from within the template prior to building the invoice. This means that the items will be selected prior to building the invoice, and no longer need to be deleted from the invoice after creation.

The Template window has been modified to display item notes from the template and to also bold comment lines to make the window more accessible.

A check box “Include Item Notes” has also been added to allow for the item notes to be copied to the new invoice.

Returns

A Return button has been added to the invoice lookup and to the HME Order Entry screen to help streamline returns. Once the button is clicked, a return will be made for either the highlighted or loaded invoice depending on where the user is located in the application. The return order will then be brought up in the Order Entry screen, and the cursor will be placed in to the window that lets a choice of a miscellaneous return or a return of an order. The order number should be already populated with the number that was highlighted when the return was started. The full return radio button should also be selected.

Shipping

A warning during the shipping process (in Order Entry) will inform the user when trying to ship a loan order with no loaded items added to the order. There will now be an option of continuing the shipping process.

There is a new flag in the Accounts Receivable control file that will allow the Order Entry screen to be cleared when an order is shipped, much like the clear on finalize flag for purchase orders. When turned on, the screen will clear after an order has been shipped and the user will be placed into the customer number field at the top of the screen.

Application Changes

When viewing shipped invoices, the serial number warning window will no longer be displayed.

When an item is linked, (and added to an order) the coverage will now always be the one associated with the linked item (instead of the main item).

Multiple Catalogue codes (when starting the order as an invoice) and changing the defaulted catalogue code, the pricing will now always update.

