

Update Features

May 2018

Version 04.22

Build 60



TELUS | HEALTH
Assyst Point of Sale

What's New?

The 'What's New' section has the most significant changes of the update, while other enhancements are included in their appropriate sections.

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.

TELUS Help is available with release notes, documentation and videos. Help can be accessed from multiple locations in the application (click on Help icon or keyboard shortcut F1) or by clicking on the following link:
<http://page.telushealth.com/webinars-assyst-pos.html>

Assyst Point of Sale

The splash screens reflect changes to TELUS branding.

[Help Functionality](#) has been added to selected screens.

Nu-Quest and AP Martin have been added as a [Vendor](#).

[Reports](#) can be emailed from the Printer List window.

["Live" Chat](#) is now available for communicating directly from the desktop to a support agent.

The [integration](#) now has the ability to scan PharmaClik (formerly Nexus) prescriptions at the till.

Assyst POS will now [integrate](#) with QuickBooks Online.

Assyst HME Enhancements

A new flag has been added to the HME/Invoice tab of AR Settings. This flag is called "Show Item Warnings". When it is checked, any item warning will be displayed in order entry.

The Sales Analysis report can now be printed from Order Entry by using the Report button.

We have added the ability to create a Service Recall Note for Service Records.

Assyst POS Application Changes

We have made multiple [changes](#) within the application to enhance functionality.



Assyst POS Enhancements

Help Functionality

The following screens have had the F1 help added:

ARCTLMNT	AR control file
ARVIEW	Receipt Detail from AR details in Customer Maintenance
CLUBMNT	Loyalty Club maintenance
LOYALMNT	Loyalty Card maintenance
VIEWER	Release Notes document viewer
POCLOSE	Purchase Order close PO window
FIXAUDIT	Fix program screen displaying results after FIXAUDIT has been run
HOTCOMM	Comm ID lookup in Multistore maintenance
LANEMNT	POS lane settings
PAIDPRT	Paid Out report
PLUMANT	Item Maintenance
RECVERIFY	POS Receiving screen
RXCHGRPT	Rx/POS interface window
SETHIST	Modify history window in POS item history
RX-PROC	Rx filling screen and all related pop-up windows

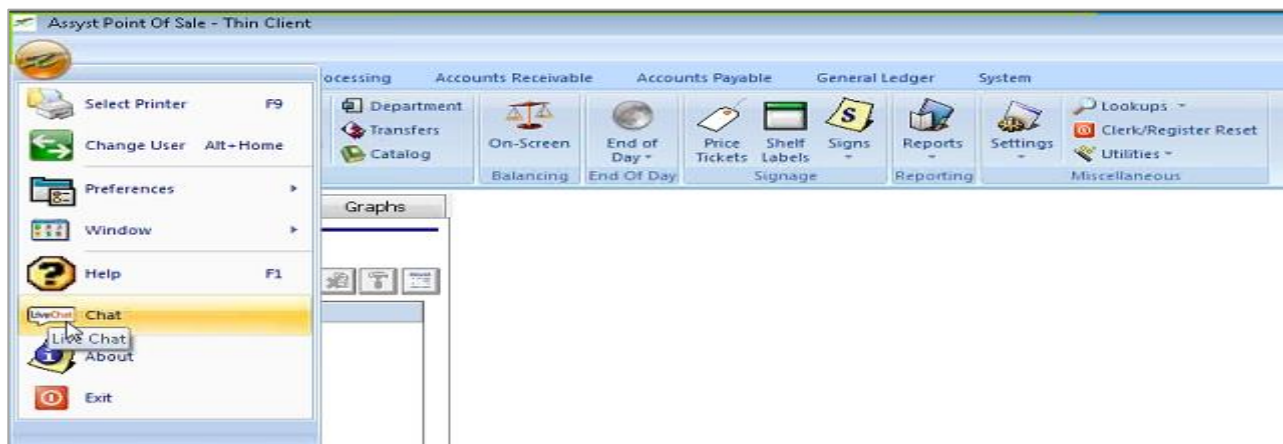
Integration

We now have the ability to scan prescriptions created using PharmaClik (formerly Nexus) software.

We now have the ability to integrate our accounting information to the QuickBooks Online software.

“Live” Chat

A “Live” Chat capability has been added to the Point of Sale module. This allows for direct communication to a Customer Support agent from your desktop.



This is also available from the Till program by pressing the Action Code key three times.

Vendors

Vendors Nu-Quest and AP Martin have been added. Both of these new vendors have the ability for catalogues, ordering and invoices.

Imperial (Previously Value Drug Mart) has updated their FTP ordering feature and these changes have been added to the application. The FTP log will have a record written whenever a transmission is processed (whether a failure or successful completion.)

Reports – Emailing

An  Email Icon has been added to the Printer Job Listing window. A report that has been printed to “File” can be emailed by clicking on this icon. To access the Printer Job Listing window, select: the TELUS button, Select Printer and then the  Job List icon.

Assyst POS Application Changes

Accounts Payable

All invoices will be included in the Invoice Aging report including invoices posted from the Receiving Interface window with no vendor selected.

Accounts Receivable

Customer Receipts – Charge transactions that are tax exempt will display correctly when printing the Customer Receipts report.

AR Trial Balance – Two columns have been added to the export functionality, these are: '91-120 Days' and 'Over 120'.

Authorizations

With Authorization set to N for price field, users cannot access the price table functionality.

Item Maintenance

In Purchase Order lookup, all orders (whether the catalogue UPC is the main UPC or related) will be displayed. Purchase Orders are grouped based on the item. It is listing the orders for the main UPC first and then lists the orders for the related UPC.

In Purchase Order Lookup, all orders will only display once with the correct number of items and dollar value.

Item Quick Maintenance

With Field #2 set to Vendor/Qty (and printer set to FILE) the columns will now align correctly.

For users set as Restricted Maintenance, further security measures have been implemented.

Loyalty

Multiple tenders (with 'Allow Greater than Sale box unchecked) will now compare the tender amount to the total remaining instead of the transaction total.

Stock returns for PERKS (with Round to Plateau checked) will display correctly on the receipt and on the till screen for both positive and negative values.

Customer Sales Analysis - When using the Points Analysis, there will no longer be any display issues with the duplicate point values.

Ordering

For Imperial orders only, sometimes depending on the timing the Busy Dialog box will now close when it completes. The store number is no longer required to proceed with this method of ordering.

For McKesson orders, users now have the option to use their new web services ordering method.

Pharmacy Integration

Fillware – All prescriptions will be included in the department totals, regardless of how the prescription was entered.

Third Party POS Charges Report – There is a box with up to 5 different additional amounts included and broken down on this report. Here is the legend for that information:

Paid: This amount is the prescriptions that have been filled, scanned and paid for at the till.

Third Party: This amount is the prescriptions with third party portions.

Prior Rev: This amount is the prescriptions that have been reversed from a prior day.

Held: This amount is the prescriptions that have been scanned and the transaction was HELD at the till.

Out: These values indicate prescriptions that have been filled (given out), but not paid for. Once they're paid for they'll show in the paid totals, and be removed from the Out totals.

Promotions

Multiple cross reference files can now be imported, regardless of the number of digits in the promotion number.

Promotion tables can now be accessed for promotions using 4 digits.

The application will allow 75 active promotions at one time, there is now a Reminder which will be created and displayed in the Information Panel for all Users when you reach 65 active promotions. This Reminder will continue until the number of active promotions drops below 65 or reaches the maximum of 75 active promotions. Once this threshold is reached, you will receive a warning message that no other promotions will be considered.

GT Ordering, when sending promotion files, the Members Only flag and the Points will be transferred around as well.

Receiving

An indicator column has been added to the receiving grid, and will indicate if an item is on promotion. With a receiving session in progress, the Promotion button will now allow access to promotion maintenance. This will allow all promotion changes (cost, pricing, etc.) to be done from one window.

If the item being received is on more than one active or upcoming promotion, a list will display to select the appropriate promotion. If the item is on one promotion only, the promotion will be displayed regardless of the status.

Item Description	R.Qty	Unit Cost	New \$	GM%	Label	Msg	Ind
HALLOWEEN ATTITUDE BRACELETS	10	0.9900	5.29	81.3	No		<*,P>

Indicators for this new column are:

*	Non Stock	Stock Flag has been set to 'Not Stocked' in Item Maintenance
P	Promotion	Item is currently on a promotion (active, over or upcoming status)
O	On Order	Item is currently on a purchase order
R	Remark/Comment	Information has been entered in the Remarks field on the Misc. tab of Item Maintenance

Reporting

Daily Receipt Analysis Report – The dates (when creating a PO) will display correctly.

Item Movement – When running this report using the export function and the Last Sold Date or the Counted Date, the results will be displayed properly.

Top Bottom Movers Report – When selecting Gross Margin Dollars, all months selected will be included in the total amounts reported. Alignment adjustments have also been done, so that there is more space between columns for better readability.

When printing this report and there were special characters in the Location, Family or Mfg fields, these items will now be included on the report.

Sign Maintenance

The font size drop down has been removed. The field is now an entry field that allows for two places.

A new  'Last Sign' icon has been added, along with an F2 keyboard shortcut.

Transfers & Adjustments

When in a single session, the number of items, the number of units and the Total Cost at the bottom of the screen will now display properly when an item is altered with both a negative and positive value.

When remaining in the same session, the process of transferring multiple serialized items has been improved making the selection of the serial number for the same item clearer.

Assyst HME Enhancements

A new flag has been added to the HME/Invoice tab of AR Settings. This flag is call "Show Item Warnings". When it is checked, any item warning will be displayed in order entry.

The sales analysis report can now be printed from Order Entry by using the Report button.

We have added the ability to create a Service Recall Note which will contain the service details for a particular item that can easily be added to any Service Record.

Assyst HME Application Changes

Item Tracking

We have added the following to this report, a flag to filter out zero balance clients and an Active Date field. For the zero balance filter, you will still see a customer on the report if they have at least on of a particular tracking item but zero on others.

Order Entry

Items with three taxes and a discount will now print the discount portion outside the column for better legibility.

Reprinting a shipped invoice will now print the original tax percentage.

When adding a Comment to the order, you will no longer see an Invalid Handle error.