

Adding a CD Stock Entry as Goods In

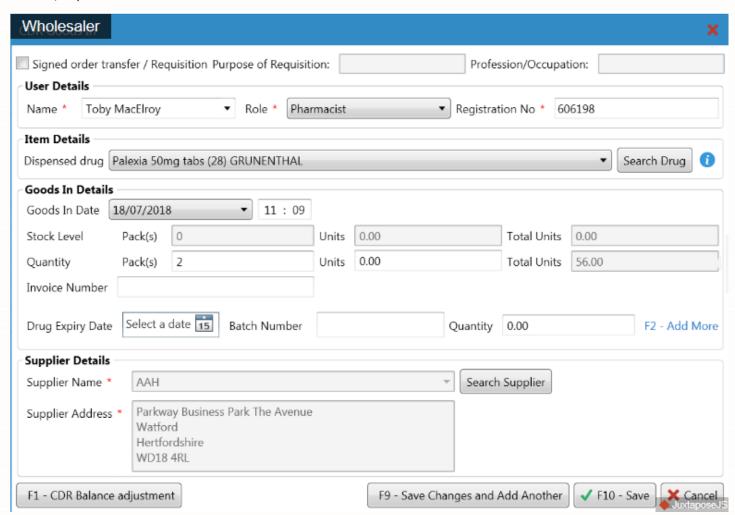


Adding a <u>CD</u> stock entry via the Ordering Manager Goods In will update your <u>CDR running balance</u>, as well as updating the Stock Record of the item. If you wish to book in stock without going to the Ordering Manager, you should follow the steps below. It is recommended that all stock received from suppliers is booked in using the Ordering Manager.

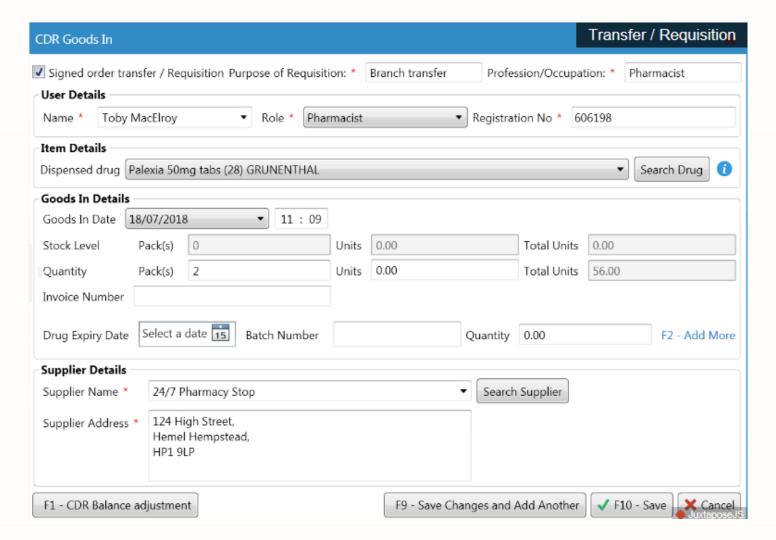
- 1. To begin, open the CDR Manager from the ProScript Connect Main Screen by clicking the [ProScript Connect] menu button and selecting the *CDR Manager* menu item.
- 2. From the CDR Manager, open the *Weekly Balance* tab and select the **[F4 Add Goods In]** button. A blank CDR Goods In window displays.

Completing the CDR Goods In Form

The screen shot below is to see an example of the CDR Goods In form completed as a wholesaler supply and a signed order transfer/requisition.









| Field/Section | If the CD goods in are being received as part of a signed order transfer or requisition, select the Signed order transfer / Requisition tick box. This will enable the Purpose of Requisition and Profession/Occupation fields which you must complete. Ticking this box will also make the Supplier Details section editable. | | |
|---|--|--|--|
| Signed order transfer / Requisition | | | |
| User Details | The signed-in user name and their role are populated by default if configured, but you may have to manually enter the registration number. Otherwise you must fill these details in manually. | | |
| Item Details | Select the [Search Drug] button to search for, locate and select the drug that you are booking in. | | |
| Goods In Details | Update this section with the <i>Goods In Date</i> and time, and <i>Quantity</i> received. Ye also add the <i>Invoice Number</i> and <i>Drug Expiry</i> details if required. Where drugs been delivered with multiple expiry dates, you can click the F2 – Add More text add more <i>Drug Expiry</i> lines. Any lines that have been added incorrectly can be Removed. | | |
| Supplier Details | Select the [Search Supplier] button to search for, locate and select the supplier. This will populate the Supplier Address field if your wholesaler address is already saved. It any amendments are required to the wholesaler address, this will need to be completed within the Wholesaler Manager. For signed order transfers or requisitions, you will be able to free-type the Supplier Details within this window. | | |

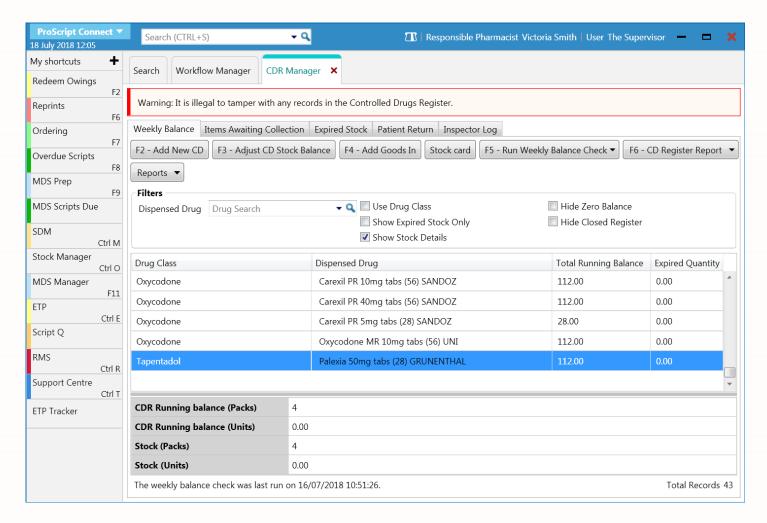


If required, you can access the CDR Balance Adjustments form from this window by selecting the **[F1 – CDR Balance adjustment]** button where you can edit the CDR balance and access the item's Stock Record.

Saving the CDR Goods In Form

- 1. Once all the required details have been completed, you can;
 - Select the [F9 Save Changes and Add Another] button to save your changes and wipe the CDR Goods In form to add another CD item via Goods In
 - Select the [F10 Save] button to save your changes and close the CDR Goods In form
- 2. The Weekly Balance tab of the CDR Manager displays, with the item's total running balance added/updated on the grid.



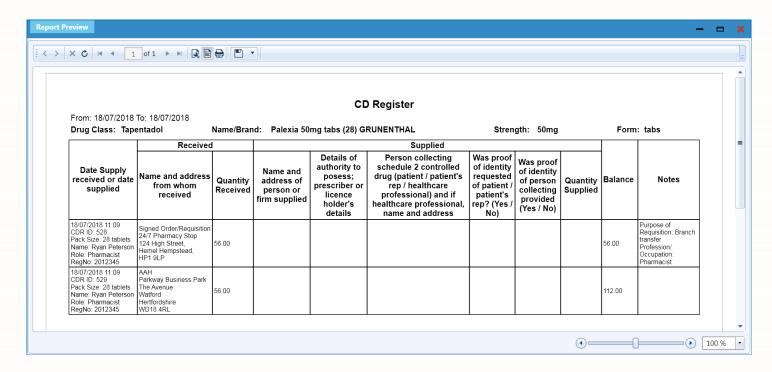


CD Register Entry

Adding a new CD stock entry as Goods In is an event that will write an entry into the CD Register which can be viewed when printing and/or exporting a CD Register report and will display;

- The Date Supply received or date supplied column populated with;
 - o The date and time the event occurred
 - A unique CDR ID
 - o The pack size and unit of measure of the CD
 - o Name, role and registration number of the user
- The Name and address from whom received with the supplier details
- The Quantity Received i.e. The Quantity Pack(s) and/or Units figure entered as part of the Goods In Details section within the CDR Goods In window
- The total running Balance after the event. For new CD stock entries this will match your Quantity Received value
- Notes if applicable, such as details of the signed order transfer/requisition if flagged during the Goods In process





Revision History

| Version Number | Date | Revision Details | Author(s) |
|----------------|--------------|------------------|----------------------|
| 1.0 | 11 June 2019 | | Joanne Hibbert-Gorst |
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Contact us

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