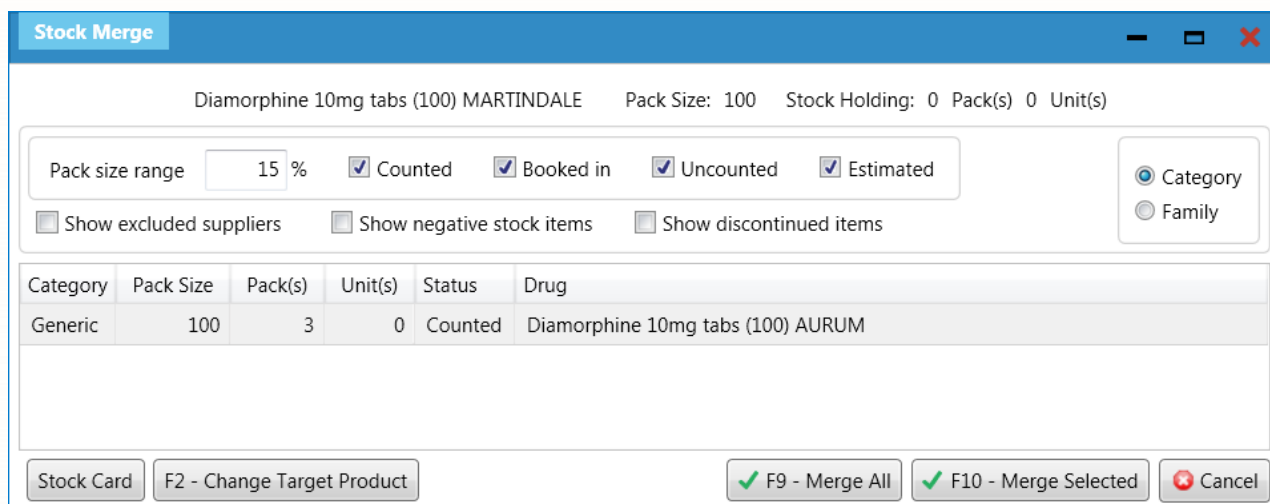# Merging CD Stock

Within ProScript Connect, users are able to merge the stock holding of two or more CDs with a target drug of the same dose, form, and pack size.

You can access the Stock Merge window from:

o   The PMR by highlighting a CD in the first quadrant and selecting the **[Stock Merge]** button
o   The CD Stock Card by selecting the **[F5 – Stock Merge]** button.

⚠️   Merging stock <u>does not</u> update the CDR balance, and therefore <u>does not</u> create an entry within the CD Register. You must manually adjust the CDR running balance for all the CDs affected by the merge once the stock merge is complete.

1.   The Stock Merge window for the selected item displays, with all products with the same dose, form and pack size as the target drug, and their adjoining stock holdings. Using the top filters to restrict the grid to the relevant items you want to merge, you can;
     o   Set and show the percentage *Pack size range* of the target drug e.g. If set to 15%, ProScript Connect will take into consideration any pack sizes 15% greater or smaller than the target pack
     o   Filter to show or hide items by status, such as *Counted* and *Booked in*
     o   Filter to show or hide *excluded suppliers*, *negative stock items* and/or *discontinued items*
     o   View the target drug *Family* or *Category*

2.   You can then:
     o   Use **[Ctrl+Left Click]** to select items you want to merge one at a time and select the **[F10 – Merge Selected]** button
   o   Use **[Shift+Left Click]** to highlight all consecutive items within your first and last click range for merging and select the **[F10 – Merge Selected]** button
     o   Select the **[F9 – Merge All]** button to merge all items
3.   A pop-up window displays, advising you that a stock merge is irreversible, and asking whether you want to proceed. Select the **[Yes]** button.
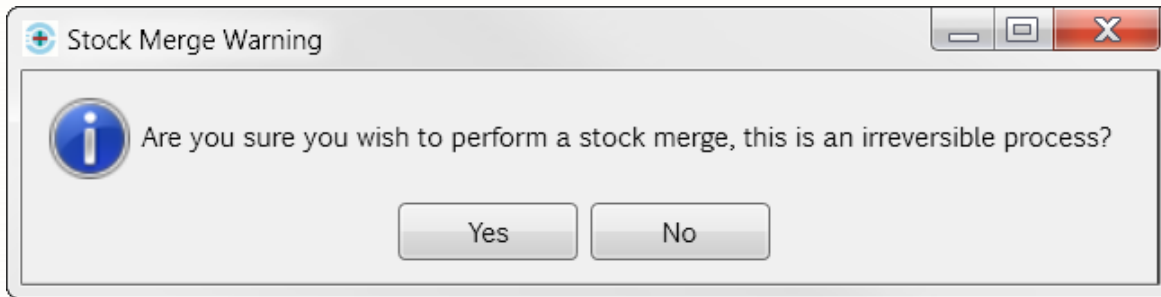
4. A second pop-up window will display with a warning that you have merged stock for a Schedule 2/3 Controlled Drug, and that you must manually adjust your CD Register balance accordingly for the affected products. Select the **[OK]** button.
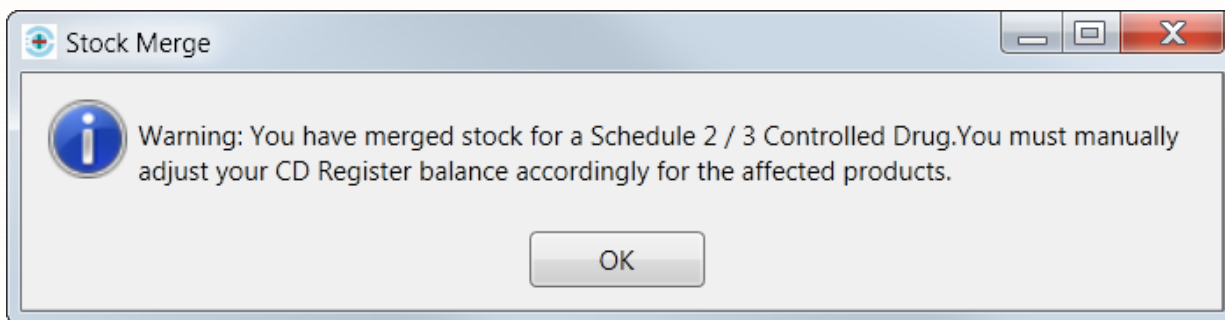
5. A third pop-up window displays, asking whether you want to change the target drug's ordering characteristics. Select the **[Yes]** button to open the item's Stock Record where you can view the updated *Stock Holding* details.
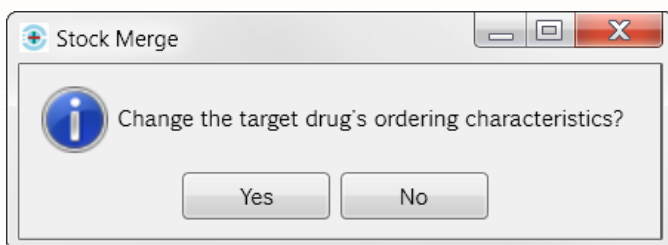
Revision History

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

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