Merging Stock from the Stock Card

From the Stock Record Card, you are able to merge the stock holding of two or more items with a target drug of the same dose, form, and pack size.

1. To begin, open the Stock Record Card for the target item (the item you are merging stock holding figures to). The Stock Record Card can be accessed from:
   - Stock Manager:
     - *Stock Usage*: Search for and highlight an item, and select the **[F10 – Select]** button.
     - *Stock Count*: Search for and highlight an item, and select the **[F10 – Select]** button. From the Enter Stock Levels window, select the **[F4 – Stock Card]** button.
     - *Stock Adjustment Report*: Highlight an item and select the **[Stock Card]** button.
   - Reprints: Highlight an item and select the **[Stock Card]** button.
   - Redeem Owings: Highlight an item and select the **[Stock Card]** button.
   - PMR: Highlight an item and select the **[Stock Card]** button.
   - Ordering Manager: Highlight an item and select the **[Alt+K – Stock Card]** button.

2. The Stock Record Card opens in a new window. Select the **[F5 – Stock Merge]** button.
3. The Stock Merge window opens. Use the available filters to adjust the grid to show/hide the products with the same dose, form and pack size as the target drug. You can:
   - 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*

4. Once the item(s) are displayed in the grid as required, you can:
   - 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 displayed in the grid.
5. A pop-up window displays, advising you that a stock merge is irreversible, and asking whether you want to proceed. Select the **[Yes]** button.

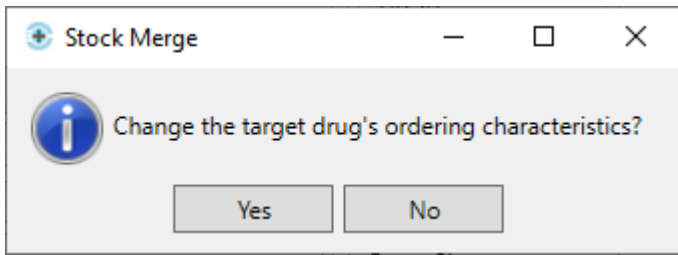6. A second pop-up window displays, asking whether you want to change the target drug's ordering characteristics. From here you can:
   - o Select **[Yes]** to keep the target item's Stock Record Card open where you can amend the item's ordering characteristics.

o   Select **[No]** to close the Stock Record Card.

Revision History

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1.0	10 December 2019		Joanne Hibbert-Gorst

Contact us

For more information contact:
Telephone: 0344 209 2601

A McKesson Company