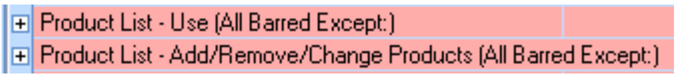
How do I...

Add products to my product list (FP19)

RoboVet Version: Feature Pack 19

Security Permissions: To set up a new product there are two security permissions required.

1. **Product List – Use:** this gives access to the **Product List** tab.
2. **Product List – Add/Remove/Change Products:** this allows the user to add new products but not the ability to re-categorise products.



There are 3 types of products that can be added.

1. New Stock Products from the Wholesaler Library
2. New Stock Products from other suppliers.
3. New Service Products

1 Adding a New Product from the Wholesaler Library

For example, adding a product called **RCW Dental Canine**

1. Click on **Product List** and highlight **All Stock** in the left pane.

2. Click on **Manage Library**.

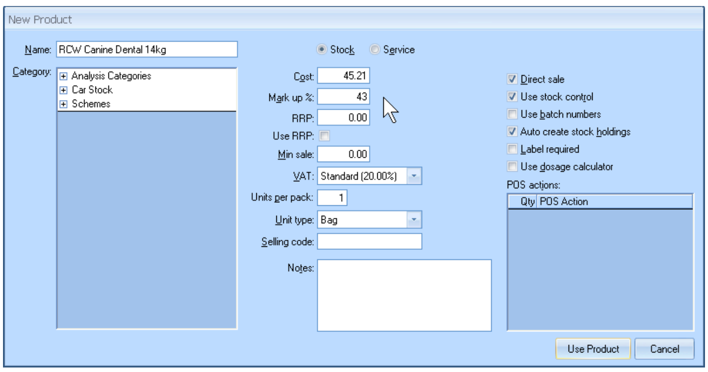
3. Choose your wholesaler – dropdown list at bottom of the right pane. You now see all the library products.

4. Type the first few letters of the product name in the top filter. You can use an *, as a wild card, at the beginning of the name or anywhere within the name.

Used	Product	Code	Price	Ref	SSM
No	Rcw Canine Dental 14kg	WRVET91	45.21		
No	Rcw Canine Dental 6kg	WRVET90	23.78		
No	Rcw Canine Dental Small Dog 2k	WRVET92	8.90		
No	Rcw Canine Dental Small Dog 4k	WRVET93	16.04		
No	Rcw Feline Dental S/o 1.5kg	WRVET94	9.50		
No	Rcw Feline Dental S/o 3.5kg	WRVETB6	17.23		

   a. Highlight the product required.

   b. Click on **Use Product** in the **Action** section of the toolbar (not on **New Stock** in the **Product** section!) and configure the options:



c. Change the name of the product as necessary – so it is easy to find and obvious how it is being sold. I have changed it to **RCW Dental Canine 14kg bag.**

d. Add the mark up percentage – essential!!

e. Add the number of units per pack. It is important that this is correct.

f. Add the unit type (this will be displayed in brackets when you are selling the product). It is essential that you add a type if you are going to use the **Dosage Calculator**. (If the unit type you require it is not in the dropdown it can be added when you are **Product Details** view later.)

g. Add a **Selling code** if you want.

h. Leave the tick in **Direct Sale** if you want the product to be sold directly when in **Selling View**. (Consumables that are ordered but not sold are normally not ticked for direct sale. Some products are only sold as **secondary products**. For example, vaccines are normally sold and or destocked as part of a service and so are included in a **POS Group**. All products in POS Groups are **secondary products**. Typically vaccines would not be available for **Direct Sale** – so this would be un-ticked.

i. Leave the tick in if you want to control the stock levels of the product.

j. Add a tick if you want to record batch numbers and expiry dates.

k. Leave the tick in **Auto Create stock holdings** if you want to be able to sell the product from all locations.

l. If you want a label to be produced place a tick in the **Label required** box. To add default label instructions you have to edit the product details later.

m. If you want to use the **Dosage calculator** place a tick in the box. The dosage calculator uses the unit type for adding instructions to the label so it is important to configure the unit type if you are using the dosage calculator.

n. Add the product to the appropriate category group(s):
There may be one or more category groups that you must add the product to. These are defined by your practice and you may have to discuss this with someone in the Support Team.
In this example there is only one **Category Group** that requires each product, the **Analysis Categories**.
Click on the + to the left of **Analysis Categories**.
Highlight the category called **1 New Products** or if you know which category it should be in select that category.
(If you have to add the product to more than one category group: select the category in the first category group, close the group and open the next group. Hold down the **Control** key and then select the 2nd category.)

o. If you want to add a POS action, for example a dispensing fee, double click in the POS action box and select the appropriate **Standard Fee**.

p. Click on **Use Product**. This will remove the product from the unused section of the library.

q. If you need to further define your product then click on **Product Details** in the **Mode** section of the toolbar.

   i. Select the **All Stock** category or select the category to which you added the product. Enter the first part of the product name in the filter of the middle pane.
   ii. Select the product and set any other fields you want to set, for example you may want to sell the product at the **RRP**. Enter the **RRP** and place a tick in the box if you want to use it rather than the Mark Up percentage.

2 Adding a New Stock Product – not from a Wholesaler library

For example, adding a product called **Yummy Chocolate Treats**

1. Click on **Product List** and then on **Product Details** and highlight **All Stock** in the left pane. Select **New Stock** from the **Product** section of the toolbar.

2. Continue as for a product from a wholesaler.

If you want to create an external order for any products from another supplier the supplier must be added to both the Suppliers and Wholesalers. Remember to define these fields when you add the product.

3 Adding a New Service Product

For example: **Consultation with Kangaroo**

1. Click on **Product List** and highlight **All Services** in the left pane. Select **New Service** from the **Product** section of the toolbar.

2. Enter the name of the product then
   a. Enter the net (cost) price.
   b. Add a mark-up if required – this is normally 0 for services and so 0 is the default setting.
   c. At this point there may be one or more category groups that you must add the product to. These are defined by your practice and you may have to discuss this with someone in the Support Team.
      In this example there is only one **Category Group** that requires each product, the **Analysis Categories**.
      Click on the + to the left of **Analysis Categories**.
      Highlight the category called **1 New Products** or if you know which category it should be in select that category.
      (If you have to add the product to more than one category group: select the category in the first category group, close the group and open the next group. Hold down the **Control** key and then select the 2nd category.)
   d. Add a **Selling code** if you want, for example **VD1** could be the code for a product called **Vaccinate Dog 1st Course.**
   e. Click on **Create Product.**

3. If this is a simple product then it is ready to sell but very often there are other fields to configure like:
   a. Adding products to be de-stocked at the **point of sale** (POS Group).
   b. Updating fields on the animal record card, for example if it is a neutering then the animal card needs to show that the animal has been neutered.

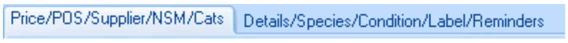
Please see the summary of the fields that can be configured at the end of this document.

4. If you need to make further changes to the product then:
    a. Select the **Product Details** button in the **Mode** section of the toolbar. Highlight the **All Services** category in the left pane or select the category to which you added the product.
    b. Type the first few letters of the product name in the filter at the top of the middle pane.
    c. Highlight the product name in the middle pane.
    d. Configure the fields as required.

Configuring Products

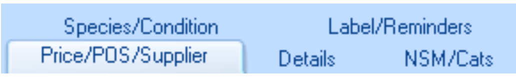
There are several tabs covering the fields that can be configured for a product. The tabs that you see will depend on the resolution of your screen and how narrow the right-hand pane is configured. The screen is easier to use in the 2-tab version shown in the first example.

For example:



Or

Or



The basic information on the fields that can be configured is shown in the tables below.

Important

The prices defined in the **PLM** screen can be set at the practice level, branch level and or the animal type level. The animal type prices override the practice and branch prices, the branch prices override the practice prices.

Price/POS/Supplier Tab

Cost	Set by user or directly from the wholesaler library. This is effectively the **List Price**. This is one of the prices on which the product **can be** priced where discounts are ignored.
Purc. Discounts	There are 3 fields for adding discounts given by wholesalers, manufacturers etc. They are additive. A tick should be placed to the right of the discount if you choose to pass it on to the client at the POS.
Net	This is the **net** price after ticked discounts have been applied and is the price that is used to calculate the selling price of the product. This is one of the prices on which the product **can be** priced where discounts passed to clients are included.
Net Net	This is the actual cost of the product to the practice and is calculated by applying all discounts even if they have not been ticked. This is the purchase price that is marked against the product at the POS so that accurate profitability can be determined. This is one of the prices on which the product **can be** priced where all discounts are included.
Units per Pack	The selling unit – how many units there are in a pack.
VAT	The rate of VAT applied to the product.
MU%	This shows the practice mark-up for the product. You can enter a negative mark-up %. The mark-up can be different at branch or animal type level. The mark-up specified at the branch or animal type level overrides the practice mark-up. Just right click to add a surgery or animal type specific mark-up. **Note:** The mark up can be back-calculated by entering the selling price you want for the product. (best to use excluding VAT price)
Apply to	This refers to which price you want the mark up to apply, list price (cost), net or net net.
PP	The price of the pack after the mark-up has been applied. This excludes VAT. **Note:** You can enter the pack price you want and the mark-up will be back calculated.
Margin	The **NET** profit on the pack based on the net net price. If discounts are not entered then cost price will be the same as net net.
UP	Selling price of a unit of the product. This excludes VAT. **Note:** You can enter the pack price you want and the mark-up will be back calculated. (best to use excluding VAT price)
POS	The price of other products may be added to the product at the POS, for example a dispensing fee. This is the POS action price added when one unit of the product is sold. In many cases this figure depends on the quantities of other products sold and so is an estimated price.
Total	The selling price of one unit of the product exclusive or inclusive of VAT. This may be an estimated value if other products are sold as part of a POS action.

RRP	The RRP is effectively giving the product a fixed price. For example, It could be the price printed on the pack by the manufacturer or a price you want to fix for a period of time for farm animals. It can be recorded but is only applied if there is a tick in **Use** – in the next column. This is always shown **inclusive** of VAT.
Use	Place a tick in this box to use the RRP. **In this case the mark-up percentage will be ignored.**
Min Sale	This function allows you to set a minimum sale price for the item. If the calculated price is below the minimum then the minimum will be charged. This is very useful for inexpensive items and when a small quantity of a product is sold. This is always shown **exclusive** of VAT. NB: The figure entered is the Minimum Sales Price of the sales regardless of how many units are sold.
POS Actions	When a product is sold there are 5 types of POS actions: 1. **Groups:** Add one or more groups of products to the parent product. There are several configurations available including the ability to include or ignore the price of the group products at the POS, or to change the quantity of consumables used in a procedure to help with restocking. 2. **Std Fee:** The ability to add a standard fee, for example a dispensing or injection fee at the point of sale. There are several options available for these fees. 3. **Documents:** When the product is sold a RoboVet merged Word document can be opened. These can optionally be saved as attachments, the user prompted to save or the document not saved. If saved, the document can be saved at the Client, Animal or Consultation level. They are extremely useful. 4. **Update Record:** When a product is sold certain records can be updated on the animal record card. These are: a. Neuter b. Decease c. Flea d. Worm e. Vaccinate f. Microchip g. Request Reference 5. **Travel:** Add the travelband charge to a product.
Supplier	The wholesaler for this product. If the product is supplied by one of the main wholesalers the product code and wholesaler name are displayed in the same line. If the product is from another supplier the supplier and product code are displayed on a separate line.
Product Code	If the product has been taken from a wholesaler then the code **cannot** be changed. This code is used when doing a wholesaler's price update.
Maker	The product maker.
Bar Code	A product can have more than one bar code. This can be used at the POS.

Details Tab

Stock / Service	Indicates whether the product is a service or stock item.
Direct Sale	This is ticked by default and indicates that the product can be sold. If it is un-ticked it will not appear at the POS. For example, vaccination drugs are de-stocked and sold as part of a service. Normally the vaccines cannot be sold on their own and so are hidden at the POS.
Use Dosage Calculator	If this is ticked then a calculator will appear at the point of sale. For example, THREE tablets TWICE a day EVERY day for TWELVE days =72. This is linked to **Unit Type**.
Discontinued	Discontinued marker. The item will not be available to order.
Allow Batch Numbers	A tick in this box turns on batch recording. A request for batch information will be made when receiving an order and when selling a product.
Auto Reorder	It is possible to base an order on the stock holding with reference to the minimum and maximum holding. If minimum and maximum levels have not been set but Auto Reorder is ticked the item will be include when generating an order. For example, a bag of food with a 0 units holding can be sold and the holding will become negative. As the minimum level is =0 you would be prompted to order up to 0.
Stock Control	This is ticked if stock control is required. This is the default.
Display Name	The display name is the name that appears on any client document. It is useful when there are, for example, several products with descriptive names that the client may query. "My dog was not large and you have charge me for castrating a large dog". All the castrations can just be called **Castration** if required.
Special Type	There are several special type of products. They are **Prescription Fee, Standard Fee, Unlisted Product and Travelbands.** They have special properties. Be careful not to remove them!!!!! For example if you removed the **Dispensing Fee** all the products originally with a Dispensing Fee will be sold without one!!
Unit Type:	This can be used to define how products are sold, for example as tablets or capsules. For each type you have to specify the plural. The type is displayed at the point of sale after the product name (in brackets) and is used if the dosage calculator has been activated. It can be used on services to remind users about the product they are selling, for example "Remember to use the Black Arrow".
Study/Modality	These settings are used in connection with **Dragon Fly** (digital imaging).
Sell in whole units	If this is ticked users are unable to sell in fractions. This field can be useful to set for services.
Min Sale qty: /Multiples	This sets the minimum quantity that can be sold, for example if a product is supplied in a blister pack of 28 and it must not be split then the minimum sales quantity is 28. This field can be useful to set for consultations. If set to '1' then even if the user tries to sell 0.5 it will still sell 1. When the **Multiples** box is ticked then the product can only be sold in multiples of the minimum selling quantity, for example only in blister packs of 28.

Min Destock qty: ***Ask Destock***	In some instances once a vial is open it has to be used immediately despite the client only having a small quantity. In this case the minimum de-stock quantity would be set to the number of units in a vial, for example 2 units for a 2ml vial. If a product is supplied in a 10ml vial then selling 0.2ml would still de-stock 10ml. The unused content of the vial is automatically recorded as **Wastage**. For some products it is possible to use some of the wastage rather than opening a new vial. If the **Ask Destock** is ticked then you will be asked if you want to destock another whole vial or use the wastage.
Min charge qty:	Enter the minimum quantity you want to charge for at the point of sale. For example, using 0.2ml from a 10ml vial, you would probably want to charge for the whole 10mls if the remaining qty was likely to be wasted.
Shelf life after opening:	If you want to use the wastage automatically created when destocking, for example a vial, then the shelf life of the product must be stated.
Selling Code	A code can used to find one or a group of products at the POS. For example, if all Flea products have the code **FL** then using the code will bring up all the flea products in the sales search. You may want to consider adding a non-alphanumeric character to differentiate a code from a standard product name, for example the backslash. So in the example above all the flea products would be displayed using code **FL**. It is possible to use unique codes (please discuss with Support). There is an action in the toolbar called **Create Product Code**.
URL	Web address so that you can go straight to a specified web site by clicking on the link. Useful for datasheets.
Alerts	Alerts can be added by double clicking on the alerts icon. Once an alert has been added the notes in the notes box will be displayed at the POS. Useful for extra H&S information, special offers, extra information to be given to the client.
Attachments	Double click on the Attachment icon to add an attachment to a product that can be viewed at the POS.
Notes	Any information you enter here will display in the notes when the label dialogue pops up. You can use it for information or descriptive purposes, for example the dose may be different for cows and sheep. The information does not appear on the label. The notes appear when the Product Alerts function is initiated

NSMs/Categories Tab

NSMs	These are **Named Selling Methods** – different ways of selling a product. For example, a product may be defined to sell per ml. When selling a 100ml bottle the price may be reduced. So, the NSM name would be **Bottle** and it would be set up to sell/destock 100 units per sale. NSMs once defined can be applied to a range of products – as long as the parent product is defined in the same way. In some practices there will be a Small Animal way of selling a product and a Large Animal way. The price charged may be based on the parent product. It is possible to prevent the sale of the parent product so that the user has to select one of the animal type options. It is possible to flag a product so that only NSMs of the product can be sold.
Categories	This lists the categories in which the product can be found (excluding the main **All Services, All Products and All Stock**)

Species and Condition

Species	Ability to set a product so that it can only be sold to specified species. To apply a tick must be placed in **Sell only to these species** box. It does what it says! You will only be able to sell to species selected.
Condition	This field is not active at the moment – FP19. Ability to specify the conditions that the product may be used to treat.

Label and Reminders

Label	Flag to set if a label is required.
Quantity	Default number of labels to print. There will be an option to force the user to specify the number of labels. This may be altered at the POS.
Label Instructions	There are 2 drop down boxes to apply default label instructions. These can be overridden at the POS. New dosage instructions can be added to the drop down lists by going to the **System Button (very top left)** then selecting **Options\Clinical\Dosage**. There is a 50 character limit on the dosage instructions.
Withhold Periods	These are added at the species level and will only work if the product has batch control turned on.
Reminders	Normally the reminder type created is the same as the one cleared. For example, a dog comes in for its booster. The old vaccination reminder is removed and a new one created for the following year. Reminder types can be added by going to the **System Button (very top left)** then **Options\Client Animal\Reminder Type.**