

Analyst Database Management

Version 3.34

© Positive Solutions Ltd.
June 2006

A reduced version of the complete Analyst manual containing:

Product Editor
Product Groupings
System Configuration
System Setup

Software by **Chris Wilcock**

Documentation by **Ian Lynch**

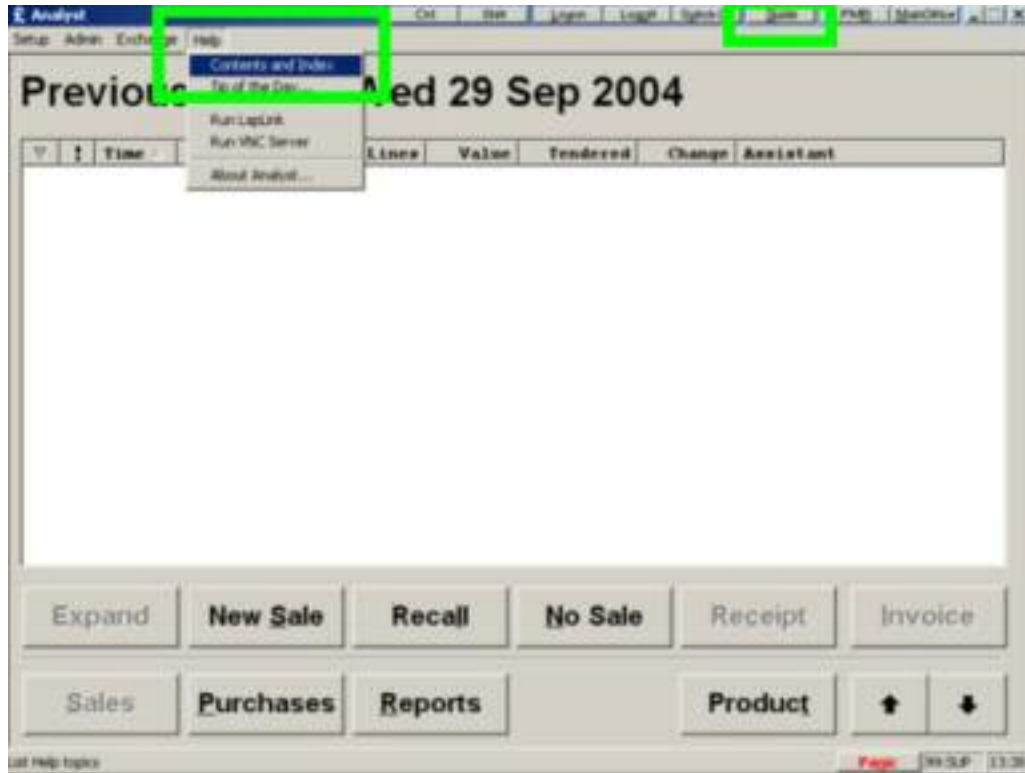
Table Of Contents

Introduction.....	1
Product Editor.....	1
Details Tab.....	2
Selling Tab.....	3
Buying Tab.....	5
Drug Tab.....	7
User Tab.....	8
Dispensed Tab.....	9
Promo Tab.....	10
Transactions Tab.....	11
Purchases Tab.....	12
Prices Tab.....	13
Classes Tab.....	14
Model Tab.....	15
Specifics Tab.....	15
Web Tab.....	16
Merge Tab & How to Use It.....	17
Paste Tab.....	18
Product Groupings.....	19
System Configuration.....	33
PoS.....	35
Options Tab.....	35
Sales Tab.....	46
Exchange Tab.....	47
Alerts Tab.....	48
Defaults Tab.....	49
Updates Tab.....	50
Addresses tab.....	51
Miscellaneous Tab.....	53
IMS Tab.....	54
Network Tab.....	55
Hardware Tab.....	56
Printers Tab.....	57
PMR.....	59
Options Tab.....	59
Dispensing Tab.....	67
Label Tab.....	68
Endorsing Tab.....	69
Alerts Tab.....	70
Addresses tab.....	71
PMR Miscellaneous Tab.....	73
ETP Tab.....	74
MAS Tab.....	75
Printers Tab.....	77
Main Office.....	78
Main Office Options.....	78
Paperwork.....	79
Printers Tab.....	80

System Setup	81
Assistant Setup	81
Assistant Options	83
Assistant Permissions	84
Assistant Templates	85
Assistant Logon Activity	87
Time and Attendance	88
Task Reminders	90
Branches	92
Licensee Details	93
VAT Rates	93
VAT Exemptions	94
Currencies	96
Time Zone Pricing	98
No Sale Reasons	99
Payment Methods	100
Uncoded Buttons	101
Speed Sale Buttons	103
Speed Dispensing Buttons	104
Calculator	105
Index	106

Introduction

This is an abridged version of the Analyst on-line help which is accessible by clicking the **Guide** button at the top of the Analyst screen or selecting **Help** from the menu bar then **Contents and Index**.



This modules of this printed help file reflects the on-line help for Analyst Version 3.34 released in June 2006. Sections covered are:

- Product Editor
- Product Groupings
- System Configuration
- System Setup

Use the on-line help in conjunction with this manual for an up-to-date answer to your questions or call the CareDesk on 01254 833310 if you require more information.

Some of the images used may reflect an older version of Analyst but the procedure will be essentially the same. The on-line help is continually being updated and changes can be found on the What's New and Previous Releases pages of the on-line version.

If you find any errors, omissions or would like to otherwise comment on either this printed manual or the online help email Ian Lynch at ianl@positive-solutions.co.uk

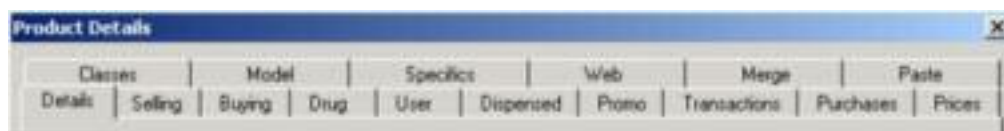
Product Editor

The Analyst Product Editor is common to all modules of Analyst although which particular tabs are displayed depends on which modules are activated on your system.

The product editor can be launched in many different ways. Most commonly, the description of a product on the system is double clicked or expanded. Alternatively, it can be launched by searching from the **Product** buttons or scanning the item on the Previous Sales and Previous Scripts screens.

The tabs found in the product editor are:

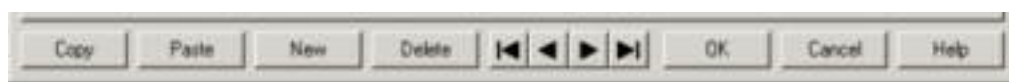
- Details
- Selling
- Buying
- Drug (PMR & IPS only)
- User (PMR & IPS only)
- Dispensed (PMR & IPS only)
- Promo
- Transactions (not Product Modeller)
- Purchases (not Product Modeller)
- Prices (not Product Modeller)
- Classes
- Model (Product Modeller only)
- Specifics (PoS only)
- Web (PoS only)
- Merge
- Paste



Common Elements

Common to all tabs except the Paste tab is the Full Description of the product. This should be unique and allow anyone to identify the product without confusion. No duplicates are allowed by default unless specified in the system configuration. Allowing duplicate product descriptions is not recommended.

The navigation buttons across the bottom of the product editor also appear throughout.



The **Copy**, **Paste** and **New** buttons are explained on the Paste tab topic. The **Delete** button will delete or set inactive the product record; the option is presented when pressed. The navigation buttons move through the database or if appropriate through the list or order the item was expanded from. Working from the left, the four buttons navigate to the first, previous, next and last product record.

The **OK** button saves any changes and closes the Product Editor. The **Cancel** button dismisses any changes and closes the Product Editor whilst the **Help** button launches this help package.

Details Tab

The details tab is the default tab that is displayed when the product editor is opened. Contained on here are the main structural aspects of the product record, prices and uniquely, graphs.



Under the Full Description, an abbreviated version of the description can be found. The Till Description can be less specific than the full description as it is used on the customer receipt, drug label, and in the sale detail window.

Product groupings are selected from the Department, Product Group and Manufacturer combo boxes. If the grouping you require is not in the list an **<edit list>** is at the bottom which will take you directly into the appropriate editor to add or amend the grouping. When that editor is closed the edited grouping will be selected in the grouping field. The PSL pharmacy secondary can maintain the Department and Manufacturer fields if selected in the Updates tab of the system configuration.

The **Stock Units** field indicates what sort of item this is. This will almost always be "items" indicating that the product is sold in distinct and consistent amounts i.e. boxes and bottles. Items can be sold in lengths, weights and volumes however and this field allows both metric and imperial measurements.

For items that do not have a pack size of '1' the drug pack size field, which is contained on the Drug Tab, is displayed in red here. The stock level of these items is usually kept in terms of the number of tablets, capsules or ml of the item. Rather than laboriously working out what 7 pack of 32 is the stock level can be entered as '7p' and Analyst will multiply that up to 224. If there is a remainder in the pack it can be entered after the 'p' so 7 packs with a remainder of 12 tablets can be entered as '7p12'.

The **VAT** field displays the VAT payable when an item is sold at the **Rate** selected.

The **Cost** fields indicates the cost price of each unit excluding VAT and can be maintained in the following ways from the **Source** combo box:

User Maintained	Analyst will make no changes to this price whatsoever. The user must maintain this field.
Last Purchase	The last price paid for this item will be displayed. The correct prices

	must be entered when receiving goods in.
Purchase Aggregate	The mean average purchase price for this item will be displayed. The correct prices must be entered when receiving goods in.
Head Office	This field is being maintained by a head office system.
(Supplier X)	This field is being maintained by an update supplied by the named supplier.

The **Retail** price indicates the price the item will be sold at including VAT. This can be maintained in the following ways from the **Source** combo box.

User Maintained	Analyst will make no changes to this price whatsoever. The user must maintain this field.
Selling Code	The code entered or scanned will determine the price charged. This is entered on the Selling tab.
User Margin	This field is calculated from the cost price displayed plus the User Margin plus VAT.
Department Margin	This field is calculated from the cost price displayed plus the margin for the associated department plus VAT.
Group Margin	This field is calculated from the cost price displayed plus the margin for the associated product group plus VAT.
Head Office	This field is being maintained by a head office system.
Point of Sale	The user will be prompted for the price at the time and point of sale. The displayed price will appear, but can be changed.
Allow Zero	This item can be sold for free.
(Supplier X)	This field is being maintained by an update supplied by the named supplier an import specified in the PSL Source of that supplier.

Margin and **Markup** are calculated from the cost and retail fields accounting for VAT if applicable. These are only editable if the retail price source is set to User Margin.

The **Stock** field indicated the amount of the product that is held in stock in total (if the Display field is 1). The **Display** and **Decimal** fields allows large volumes of small items easier to cope with and work well with items sold in quantities of weight, length and volume. The Display field acts a divisor for the stock field whilst a number of decimal places can be added. For example, if you sell electric cable, you probably want to track sales in metres. However, if cable is supplied to you on 100m reels, you can have Analyst display stock and sales figures in terms of reels by setting Display to 100m. If you would like to see figures in terms of reels, but with an accuracy of 10m, set Decimals to 1.

The **On Order** field is updated by the system and indicates how many items are contained on inbound orders.

The **Product Information** panel shows many useful statistics about the product. The maximum daily sales and demand figures relate to the last 90 days. Beneath the panel lie 10 buttons which display graphs in the place of the information panel. Each of the graphs display monthly figures covering the current month and the previous 12. Graphs of the same type can displayed simultaneously by selecting more than one button.

Selling Tab

The Selling tab is where you define and maintain the codes used to sell the product. Each product code can optionally have an associated retail price and pack size, allowing you to define check-weight codes for pre-packed items such as cheeses, if you need to.



The following icons are used to denote the type of each product code:

-  Product is pre-packaged
-  Loose weight product, weighed on scales

The codes can be maintained by using the **Add**, **Edit**, **Delete** and **Loose** buttons. The **Add** and **Loose** buttons are used for pre-packaged and loose weight codes respectively. The **Labels** button allows shelf edge labels to be printed for a particular code of this product. Codes can be alphanumeric (a mixture of numbers and letters) and there are no limits to the number of codes each product can have assigned to it, although each must code must be unique. Each code can have a **Retail** price associated which is used when the Retail Source on the Details tab is set to Selling Code. A **Location** can be recorded which can help with analysis of which areas of your shop are selling the most items. The **Pack Size** by default is 1, although it appears blank. This can be set to however many units are sold when a particular code is entered which is useful for twin-packs and items sold in length, weight and volume.

The selling tab also contains the following fields and controls:

The **Maximum Discount** can be specified as a percentage in the field above the main pane. This determines the **Minimum Retail** price, and vice versa. If a line discount is performed in a sale that exceeds the maximum discount held here, a message will appear to warn the assistant. If a sale discount is performed that affects this item and is in excess of the level specified here, the discount for that line will be restricted to the maximum discount level.

By using the **Message** options in the top right, a message can be configured to pop-up to provide more information to the assistant when this item is scanned. These are commonly used to inform customers of special offers and to maximise selling-up opportunities.

The **Restriction** option allows a number of restrictions to be placed on the sale of an item. Use the **<edit list>** option at the bottom of the list in the combo box to create new sale restrictions. These can be suggested or enforced and can be based on time of day, for the sale of alcohol for example, suggested age limits or to have certain people present within the business, like a pharmacist for the sale of P items.

Facing is an analytical field for the number of facings of a product to be recorded. This can be used in the reports section for calculations and other sales analysis.

The **Exemptible** check box is used to indicate whether the item may be exempt from VAT if bought by a qualifying customer whilst the **Blank CDU** box provides an element of discretion when selling sensitive items as the Customer Display Unit displays only the price of the item scanned rather than the description and price.

Buying Tab

On this tab, the supplier order codes are maintained, the main suppliers of the product are specified and other ordering information is stored.

Code	Supplier	Pack Size	Singles	Dates	Cases	SSP
E4657	Enterprise			12	0.00	0.00
LP007440	Vetric		0.17	1	0.17	0.50
P1074657	Mascho-Phc		0.17	12	2.04	0.50
P1074657	Mawdsley		0.00	1	0.00	0.00
P1074657	Pho Standard Goods			12	2.04	0.50
SPARA32	Sigma Pharmaceutical		0.00	1	0.00	0.00

The **Daily Supplier** and **Bulk Supplier** are specified in the top right of the screen. The Daily Supplier is used when generating Top-up orders, the Bulk Supplier on Bulk Orders. These are selected from the appropriate combo box. Additions and alterations to the list can be made with the **<edit list>** option at the bottom of the combo box list which opens the supplier editor.

The **Minimum Stock** field influences the automatic re-ordering calculation in such a way that at least this many items will always be in stock. The **Capped** field a user definable field which introduces an artificial figure into the re-ordering calculation to replace any higher and often erroneous actual daily sales figure preventing the actual figure resulting in an overstocking of the item. **Hold-off** allows the re-order calculation to be delayed until the counted stock level reaches the figure entered here. The **Capped** and **Hold-off** fields have no affect on the reordering if left blank.

The **Add**, **Edit** and **Delete** buttons allow maintenance of the order codes displayed in the main pane. Each of the fields are:

Supplier: The supplier this code relates to.

Order Code: The supplier order code including any prefixes.

Availability: Whether the code is Available, Suspended or Discontinued.

Singles/Case code: Does the supplied interpret this code as a single unit or as a case of units?

Outer: The number of units in a case.

Pack Size: This is the amount by which the stock level of the product should be increased when one of this order code is received into stock. For most products, this will be 1 item.

Case Price: The price charged by the supplier for a case of this item.

Unit Price: The price for one unit based on the case price divided by the case size.

Single Price: The price charged by the supplier for one unit of this item.

SSP: The suggested selling price from the supplier.

Minimum Order: The minimum order quantity accepted by this supplier. If one or more items are required, the order quantity will be rounded up to this figure.

Order Multiple: The order quantity will be rounded up to the next order multiple to satisfy suppliers that only supply this item in certain multiples.

Supplier-Specific Order Code: Despite the code prefix which might suggest the code is common across several suppliers, this check box indicates that this code is unique to this supplier and should not be used for any other suppliers which might use the same code prefix.

The **Re-ordering** combo box allows selection of the re-ordering method to be used for this item. These are explained in the Purchases section of the Help.

The **Re-order anywhere** box indicates that this item has previously not been available from the Daily Supplier. It will therefore be appended to any other supplier order using the same code type as the Daily Supplier. This is as a result of the "Auto re-order elsewhere if zero stock received" option in the purchases section of the system configuration.

Drug Tab

The drug tab is only available to users of Analyst PMR and IPS as this tab relates to the information contained in the Positive Solutions Drug File, released weekly and applied by users of our dispensary systems. All fields on this tab are maintained by the DFU and any queries should be directed to the CareDesk who will refer you to the Database Coordinator.

Working from the top right, the **DFU Hook** indicates a link to the drug file update. The button next to this deletes the link and should only be used at the request of the CareDesk. The **Legacy** box is checked if this drug was imported from an old PMR system and no match was found in the new drug database. The repeating, dispensing and ordering of this drug is restricted as insufficient information is held about it. This box can be manually checked to restrict the use of drug, but should never be removed unless you are completely confident that all the details are correct and it can be safely dispensed.

The **Caution Text** contains the label text indicated in the BNF. These can be combined by using the numbers of the cautions separated by a comma and no spaces. More complicated cautions can be specified by using the cautions editor found by selecting the **<edit list>** option at the bottom of the cautions combo box.

The **Drug Family** is the generic drug name, form and dose of which there can be many manufacturers, PIs and proprietary brands. The number of dispensing **Fees** paid to the pharmacist for dispensing this item is entered in the next field. The **Drug Group** is selected from the combo box. The number of NHS **Charges** paid by the patient is used on an IPS system to ensure the patient is charged the correct amount.

The **Drug Pack Size** and **Sub-pack** indicate the number of items in the drug pack or if appropriate the size in millilitres, grams etc. The number of labels printed determined by the number dispensed divided by the drug pack size. Un-splittable packs such tubes, pumps and similar have their **Container Qty** entered here. The **Stability** field contains the number of days the item is reconstituted or opened and affects the expiry date on labels for these items.

The **Form** of the drug is indicated by the combo box to the right of Drug Family and underneath the **Endorse** field will contain any specific endorsing text. The **Interaction Triggers** pane lists any active ingredients in the drug which will be checked between others. The **Endorsing Triggers** contains settings which maximise remuneration. These are arranged alphabetically although checked boxes float to the top of the list.

The **Categories** pane contains a number of settings. The **Legal Categories** section contains legal restrictions concerning the dispensing of this drug. The **Dispensing Control** allows other restrictions to be put in place such as the Dental and Nursing Formularies. The **Standard Warnings** section allows extra warnings on the labels with respect to storage and usage of the drug.

User Tab

The User tab of the product editor is also only available to users of Analyst PMR or IPS as more configuration relating to ethical drug are contained here. All of the settings on this tab will not be interfered with by any updates.

There are six sections to this tab. In the dispensing section, a **Hit Code** can be defined to speed up the dispensing of this item. Type in your preferred code here to directly identify this product whilst dispensing. You can save even more time when dispensing by entering a default dose in the **Dose** field. When using dose codes, a 'tool tip' appears to help you a pictured above. Use this for medication that has one main dose which can just be confirmed when dispensing rather than having to enter it each time.

The Physical Attributes section allows you to fill in the **Colour**, **Shape** and **Form** of the medication which is printed on Nomad cassette inlays.

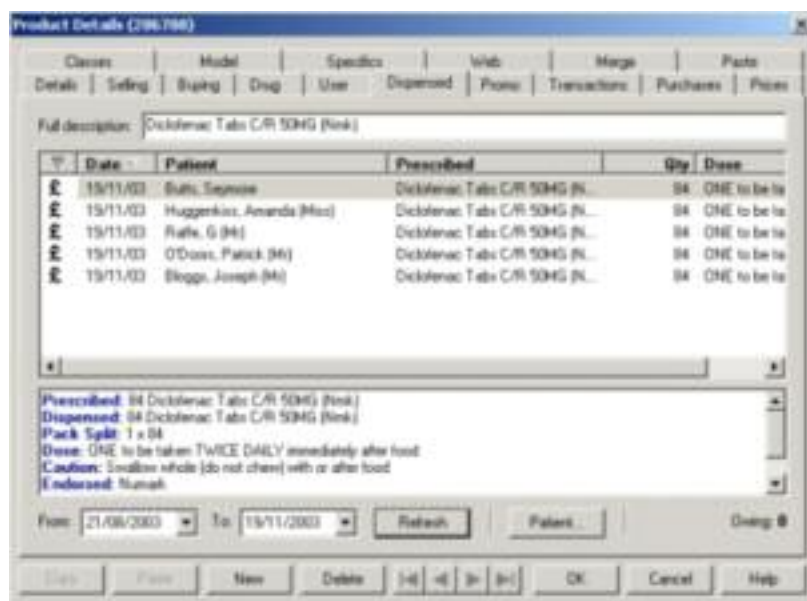
The **Product Substitute** and **Family Substitute** sections allow the stock of a different item to be affected when this item is dispensed. Ideal for any brand equalisation deals you may have. Apart from simply dispensing the substituted product when this item is selected the drug search can be modified to hide the drug(s) which will should not be dispensed. To do this the "Limit to restricted products initially when dispensing" option in the Options Tab of the PMR system configuration should be selected.

If you would rather use your own **Custom Endorsement** rather than the system endorsement, this can be configured here. Free type in the field and use the 'Replacement parameters' to print variable fields. If you want the amount dispensed in the endorsement of the drug use '\$D' in the text of the field, and so on. An asterisk can be entered to omit all endorsing text. These setting override any system endorsements.

The Miscellaneous section allows to specify some final settings for this drug. The drug name will be replaced with whatever is typed in the **Label Text** field, which allows a specific and distinct description to be maintained on the system but have a separate, simplified name on the drug label. By placing a tick in the **OTC line** and/or **Dispensary line** box, the drug can be forced to appear in either or both of the search sections. By placing a tick in the **Do not allow direct Repeating** box, the users of the system will be prevented from using the repeat facility when dispensing. This is used mainly to force the used to discontinue items and force the user to search for a replacement. The item can also be set to perpetually print on MDS by selecting the final option **Do not remove from MDS after printing paperwork**. This is especially useful if the item is used regularly by the patient but is not dispensed every time. Checking this option will override the option to clear the MDS boxes in the Homes Setup.

Dispensed Tab

The third tab available only to Analyst PMR and IPS users and details the dispensing history of this item.



The main pane of this tab displays the dispensing history of this item for the period specified by the dates in the bottom left of the dialogue, which is set to the last 3 months by default. The bottom pane displays the details of the line highlighted in the top pane. These details reflect what was dispensed at the time of the dispense and cannot be altered at a later date.

To view a different date range, change the **From** and **To** dates and press the **Refresh** button. The **Patient** button displays the patient details which relates to the highlighted line in the top pane.

The number of items currently held on **Owings** are displayed on the bottom right of the dialogue.

Promo Tab

The Promo tab contains the details of any product level promotions that are triggered by this item. The topic on promotions discussed the setting up and maintenance of promotions.

The main pane of the tab displays any promotions that are currently active or setup in advance. New product specific promotions can be setup and maintained from here by pressing the **Add** and **Edit** buttons. Promotions that have expired are automatically deleted, but the **Delete** button can be used to remove current or impending promotions. The **Promo Stock**, if applicable is entered in the field below the main pane. This is the number of items that can be sold whilst on promotion. This can never exceed the total stock on the details tab as they decrement together. When the promotional stock is reduced to zero, any 'while stocks last' promotions will expire at the end of the sale that reduced it to zero.

Any **Time Zone Pricing** can be entered in the field below. This is the price to be charged for this item during the time zones configured from the Setup menu. If any electronic shelf edge labels are installed the corresponding **ESEL** number should be entered here so the label can change at the specified times.

The **Location** of this item can be tracked by selecting the location from the combo box. These can be edited by selecting the **<edit list>** option from the list.

Transactions Tab

This tab details each day's activity for this item with a coloured summary line for each week and month if the buttons are selected below the main pane. The main pane shows the last three month's data, but the **Starting Date** can be changed at the bottom right to change the amount of history viewed.

Period	Sales	Lost	Purch	Waste	Shrink	Grow	Xfers
Sat 13/09/03	1	0	0	0	0	0	0
07/09 - 13/09	2	0	0	0	0	0	0
Tue 16/09/03	1	0	0	0	0	0	0
14/09 - 20/09	1	0	0	0	0	0	0
01/09 - 06/09	5	0	0	0	0	0	0
Fri 03/10/03	1	0	0	0	0	0	0
Sat 04/10/03	1	0	0	0	0	0	0
28/09 - 04/10	2	0	0	0	0	0	0
Sun 26/10/03	1	0	0	0	0	0	0
Wed 29/10/03	2	0	0	0	0	0	0
01/10 - 31/10	5	0	0	0	0	0	0
26/10 - 01/11	3	0	0	0	0	0	0
Thu 16/03/04	0	0	0	0	0	0	0
14/03 - 20/03	0	0	0	0	0	0	0
01/03 - 31/03	0	0	0	0	0	0	0
TOTAL	17	0	0	0	0	0	0

The columns are:

- Sales
- Lost sales
- Purchases
- Waste
- Shrinkage
- Growage
- Transfers
- Cost Value
- Retail Value
- Profit Value

Purchases Tab

This tab records every purchase of the product.

✔	Date	Order	Supplier	Code	Delivered	Received	Price	Lead
✔	27/09/03	04902	Enterprise	E4355	36	36	0.69	5
✔	14/12/02	03673	Enterprise	E4355	36	36	0.69	5
✔	13/10/01	02405	Enterprise	E4355	36	36	0.73	5
✔	09/06/01	02003	Enterprise	E4355	36	36	0.73	5
✔	26/02/01	01657	Enterprise	E4355	36	1	0.73	3
✔	15/12/00	01394	Enterprise	E4355	36	36	0.73	1
✔	13/07/00	00950	Enterprise	E4355	36	36	0.59	1
✔	06/07/00	00024	Enterprise	E4355	36	0	0.59	
✔	23/03/00	00486	Enterprise	E4355	36	36	0.62	1
✔	05/01/00	00185	Enterprise	E4355	36	36	0.62	1

The columns are:

- Date ordered
- Order number
- Supplier used
- Order code used
- Quantity ordered
- Quantity received
- Unit price paid
- Lead time

Prices Tab

This tab records the historical prices of the product, who changed it and when. Each line displays the details of each price change with old and new cost and retail prices for every entry with, by default, the oldest price at the bottom and the current prices at the top. The icons in the left columns indicate at a glance whether the cost and/or retail price has increased, decreased or remain unchanged on that line.

The screenshot shows a window titled 'Product Details (75237)' with a 'Prices' tab selected. The window displays a table of historical price changes for the product 'Nurofen Paracetamol Tablets 500MG 32'. The table has columns for 'C', 'R', 'Date', 'Old Cost', 'New Cost', 'Old Retail', 'New Retail', and 'Margin'. The data is sorted by date, with the oldest entry at the bottom and the most recent at the top. The 'C' and 'R' columns contain icons indicating price changes: a solid triangle for an increase, an open triangle for a decrease, and a solid square for no change.

C	R	Date	Old Cost	New Cost	Old Retail	New Retail	Margin
▲	▲	26/11/02 10:34	0.17	0.25	0.59	0.65	54.95%
○	▲	02/04/01 11:40	0.17	0.17	0.49	0.59	66.00%
○	▲	30/03/01 10:26	0.17	0.17	0.59	0.49	59.52%
○	▼	30/03/01 10:26	0.17	0.17	0.45	0.59	66.00%
○	▲	30/03/01 10:26	0.17	0.17	0.59	0.45	69.09%
○	▲	06/06/00 17:46	0.17	0.17	0.29	0.59	66.00%
○	▼	06/06/00 09:29	0.17	0.17	0.59	0.29	32.00%
○	▲	11/11/99 00:00	0.00	0.17	0.00	0.59	66.00%

The columns in the window are:

- Icons. At a glance was the price increased, decreased or was it unchanged.
- The date and time the change was made.
- Old and new cost prices
- Old and new retail prices
- Margin and markup based on the new cost and retail prices.
- Source: how the price was changed. Usually either User Edit, Price Over or Database Update (PSL)
- Which assistant was logged on when the change was made if appropriate.

Classes Tab

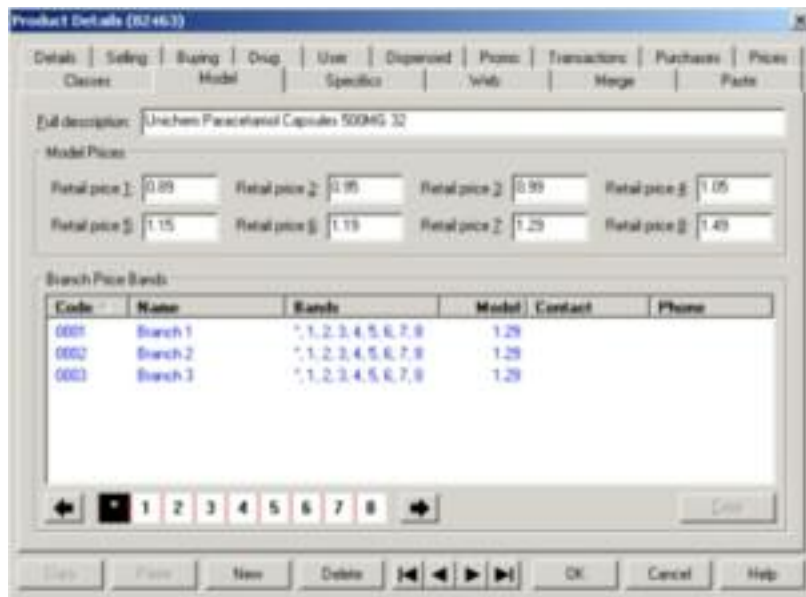
This tab allows the product to be placed in any of the eight user classes. These are defined from the Setup and Product Groupings section of the system, although each of the classes can have entries added or modified, by selecting the **<edit list>** option at the bottom of the appropriate combo box.

The screenshot shows the 'Product Details (R0463)' window with the 'Classes' tab selected. The 'Full description' field contains 'Unichem Paracetamol Capsules 500MG 32'. The 'User Classes' section contains eight dropdown menus, all currently set to '(None)'. The 'Loyalty Scheme Exceptions' table is empty. The window has a menu bar with options: Details, Selling, Buying, Drug, User, Disposed, Points, Transactions, Purchases, Prices, Classes, Model, Specific, Web, Merge, Paste. The bottom of the window has buttons: Add, Edit, Delete, OK, Cancel, Help.

The bottom pane allows this product to be exempt from the normal conditions of loyalty schemes. This can either be to prevent points being earned by the sale of this product or allow more points to be earned as part of a promotion. These exemptions can be set to apply for a set date period only if required. See the loyalty scheme section for more detail.

Model Tab

The model tab is only available to users of the Product Modeller and allows configuration of up to eight price bands. The price band sequence for each branch can also be modified on this tab.



The Product Modeller section of the help provides a complete guide to this setup.

Specifics Tab

This tab which is only available to PoS or IPS users allows a combination of the **Batch Number**, **Serial Number** and **Expiry Date** of the product to be tracked.



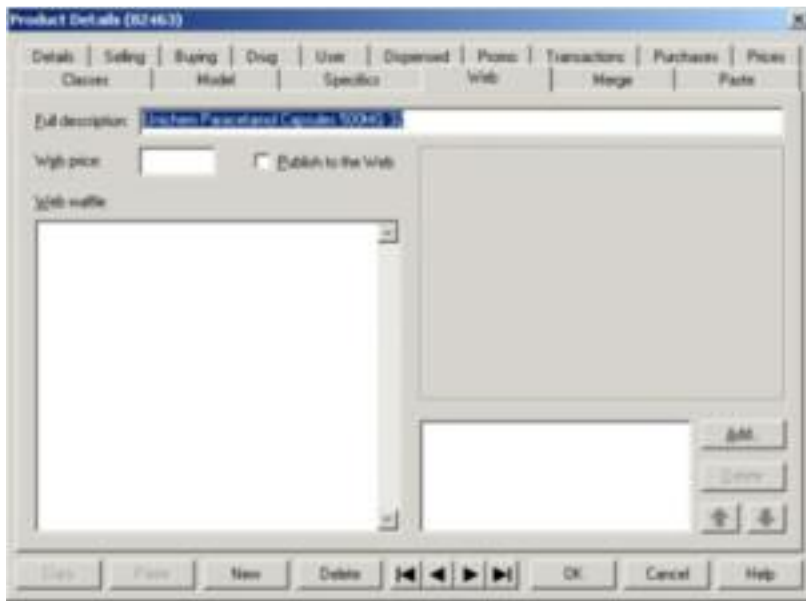
By clicking in the appropriate check box above the main pane, a new column for each option is added. When adding stock this product the specific information must be

added. For Batch and Expiry tracking the number of items that share the same specific must be entered, for Serial tracking the serial number for each item must be entered.

When selling the item the user will be required to enter which specific is being sold. This is printed on the receipt and if a **Warranty Slip** is selected in the combo box above the main pane, a separate receipt is printed outlining the terms of your warranty.

Web Tab

This tab is also only available to users of Analyst PoS or IPS allows the maintenance of the product record for export and use by another application. One main use of this other application could be to maintain the database underpinning a web site.



A specific **Web Price** can be entered and the flag **Publish to the Web** allows a restriction to prevent your entire Analyst database being exported. A description of the product should be entered in the **Web Waffle** window to aid the remote browsing encountered on the web. In the bottom right a digital picture can be associated with this product by using the **Add** button. The preview of any GIFs are displayed in the window above.

Note: Positive Solutions Ltd., does not provide the facility to design, host or maintain any web sites. We will gladly assist the export of the data from Analyst into a usable format, but the construction and maintenance of any site must be undertaken by yourself.

Merge Tab & How to Use It

Using this tab, product records can be merged together. This should only ever be performed on items which have become duplicated by accident.



To make this task easier, search for the range or run a report that will include all items you wish to merge. When you have a list of your items, expand one of them into the Product Editor and select the **Merge** tab.

The main pane in the centre of the editor lists all items to be merged. To add this item to the merge, press the **Add** button. The description of the item will now appear in the list. Use the browse buttons to move through your previous list and add the items to be merged. One of the products listed must be designated as the 'parent' product and will receive the information from the rest (the 'children') of the products listed.

Analyst remembers the products that have been selected for merging, even after the product editor has been closed. This feature allows you to select multiple products individually by using the description search facility, or even to select some products in the EPOS program and the remaining products in the PMR software.



The icons represent the following:

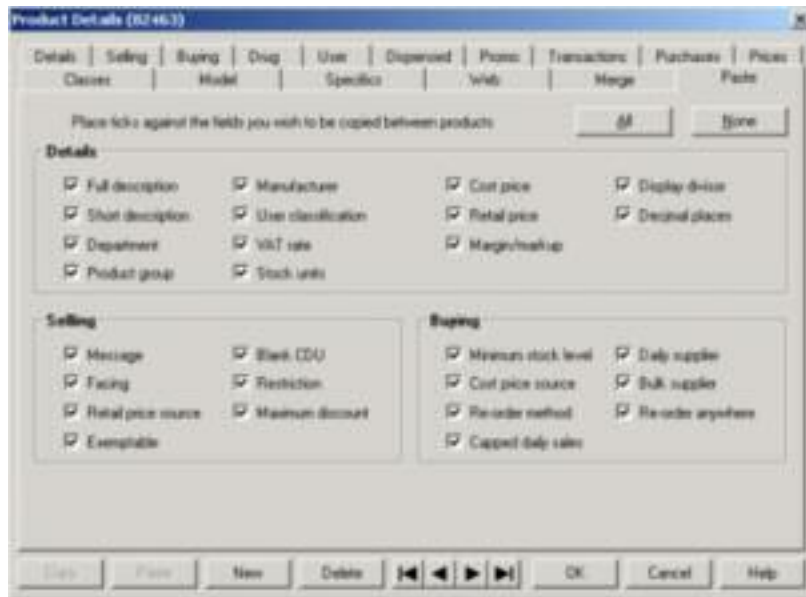
-  This product is designated as the recipient of the merged information, or the 'Parent' product.
-  This is the current product being viewed in the Product Editor.

The fields selected from the list on the bottom right of the window for the highlighted product will be merged. These can be different for each of the products selected. For example, you may wish to merge the sales and stock information of one product with the purchasing and buying codes of another.

When you are satisfied that you have set-up the merge as you require, press the **Merge** button. This happens with immediate effect and when complete, the Product Editor displays the 'parent' product with merged details.

Paste Tab

This tab is used in conjunction with the **Copy**, **New** and **Paste** buttons of the Product Editor.



The options on this tab dictate which of these fields are pasted into a new record when using the copy and paste facility. This is primarily useful when adding a range of new products which share many of the entries on the Detail, Selling and Buying tabs.

Creating New Product Records Using the Copy and Paste Facility

Create or identify the source record, and ensure all the details are correct. Click onto the Paste tab and un-check any of the field you do not wish to be pasted into a new record. When complete, click back onto the Details tab and click **Copy**. Now click **New** to create a new blank product record and click **Paste** to paste the source record's details into. Be sure to amend any of the fields that are incorrect for this new product, especially the descriptions.

The procedure can be repeated as many times as is necessary or until the Product Editor is dismissed with the **OK** or **Cancel** buttons. A new source record will need to be found and copied each time the Product Editor is opened.

Product Groupings

Why Group Products?

Product groupings provide a good structure for your database and allow like products or products from the same supplier or manufacturer to be grouped together. Reporting is also made a lot easier and informative if products are correctly sorted into their respective groups.

There are a number of different groupings in Analyst which are included in this section. All of them work in very similar ways, so once you understand how to setup and assign one type of product group, you will be able to do most others.

The Analyst Product Groupings are:

- Departments
- Product Groups
- Manufacturers
- Suppliers
- User Classes
- Drug Families (PMR Only)
- Locations
- Messages
- Sale Restrictions (PoS only)
- Stock Dumps

Department Setup

Departments are one of the main product groups and is maintained by the weekly OTC database update by default.

To setup departments select **Setup** from the menu bar, then **Product Groupings** and **Departments**.



Departments can be added, edited or deleted from here by using the buttons at the bottom of the window. In each department is the option to assign a **Margin** or **Markup** and the **UCS VAT** (Uncoded Sale VAT Rate) to be applied by default. If any of these fields are changed, any products whose retail price source is set to 'department margin' will be re-calculated.



The margin/markup fields are used if a product is set to the retail price source of "Dept Margin". The VAT rate is used to calculate the VAT payable for uncoded sales made to that department. If no VAT rate is specified, the user will be prompted during each uncoded sale to that department. This is time consuming and can result in errors in VAT calculation.

On the right side of this window is the option to exclude the entire department and all items assigned to it from whichever loyalty schemes are displayed and checked in the list.

Product Group Setup

Product groups are similar to departments with the exceptions that they are not setup or maintained by PSL and they cannot be excluded from loyalty schemes.

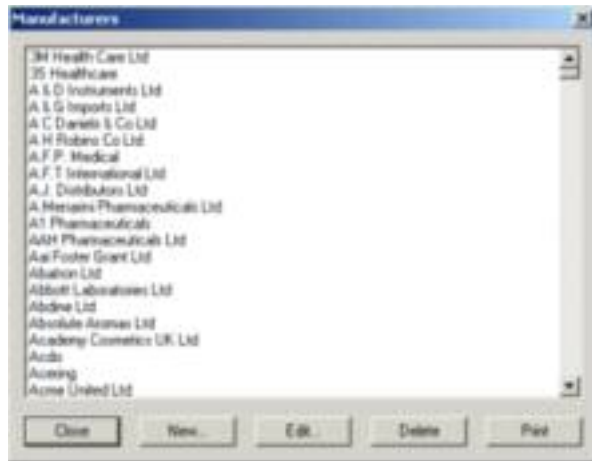
To setup product groups select **Setup** from the menu bar, then **Product Groupings** and **Product Groups**. Groups can be added, edited or deleted from here by using the buttons at the bottom of the window. In each group is the option to assign a **Margin** or **Markup**.



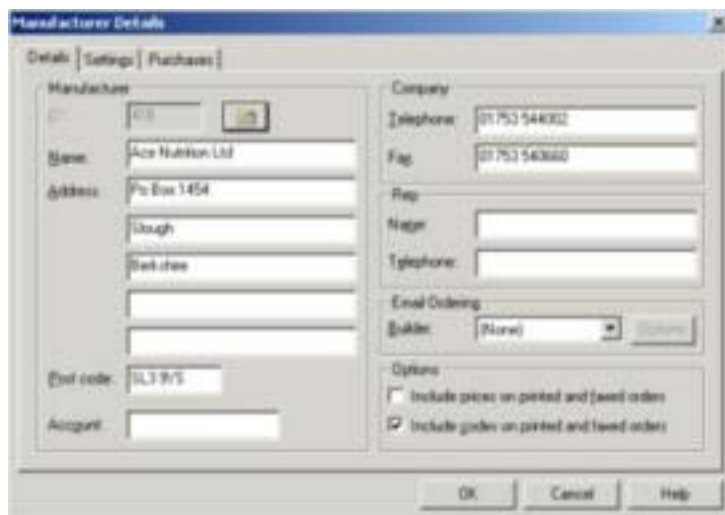
The margin/markup fields are used if a product is set to the retail price source of "group margin". If they are changed, any products whose retail price source is set to 'group margin' will be re-calculated.

Manufacturer Setup

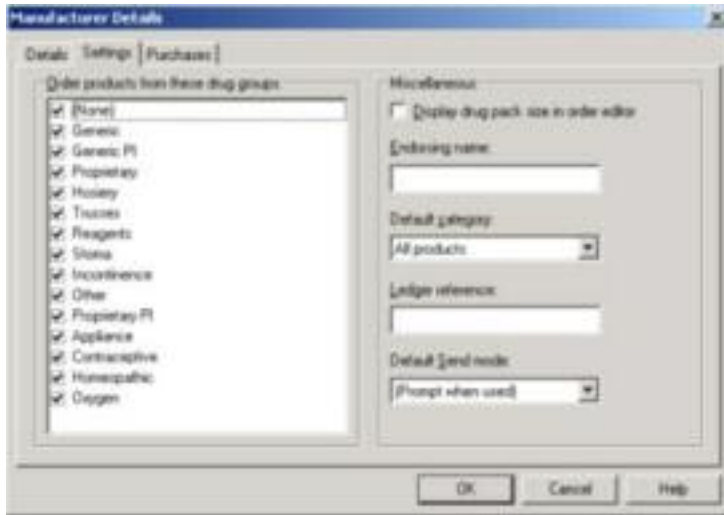
The manufacturers are added and maintained by the weekly OTC database update. Additional manufacturers can be added by selecting **Setup** from the menu bar, then **Product Groupings** and **Manufacturers**.



Manufacturers can be added, edited or deleted from here by using the buttons at the bottom of the window. The address and other contact details should be completed as orders can be built for manufacturers and incomplete or incorrect details could prevent the order from being transmitted properly. The order codes and prices used in the order builder can be omitted from faxed orders by selecting the check boxes at the bottom right of the window.



The Settings is used to restrict the types of items that this manufacturer will be requested to supply. By default these are all checked, but if you do not wish this manufacturer to supply any of a particular category of products remove the tick.

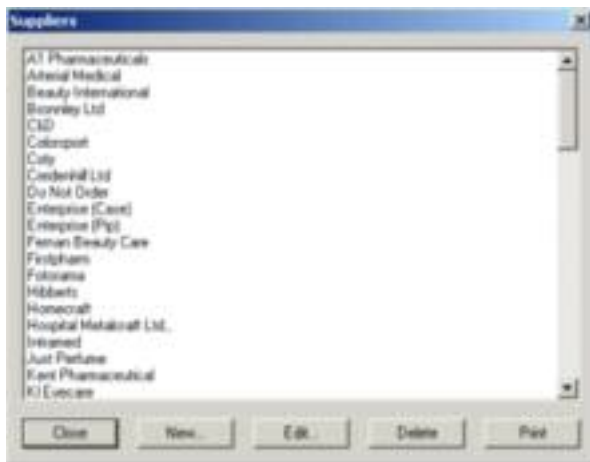


The miscellaneous options are whether to display the drug pack size column when building or accepting orders, the short name to printed on prescriptions when endorsing and whether to restrict the ordering to OTC or dispensary lines only, or not. The Ledger reference will provide a supplier ID when exporting to an accounts package and the Default Send mode allows a step to be skipped when sending orders. If you wish to send an order by another method to this default, press and hold the **SHIFT** button when clicking **Send** to display all the send options.

The Purchases tab stores a record of all orders received from this manufacturer.

Supplier Setup

Suppliers are, as expected, those companies you will be ordering from. These are added by selecting **Setup** from the menu bar, then **Product Groupings** and **Suppliers**.



Suppliers can be added, edited or deleted from here by using the buttons at the bottom of the window. The address and other contact details should be completed as orders can be built for manufacturers and incomplete or incorrect details could prevent the order from being transmitted properly. The CareDesk can help you complete the details if you call them. The order codes and prices used in the order builder can be omitted from faxed orders by selecting the check boxes at the bottom right of the window.

If you are the recipient of a database update from Numark and this is the one of the suppliers you order their products from, select the PSL Source for this item to Numark.

This supplier can be set as default for Numark updated products in the System Configuration and the prices of those products can be more easily maintained in the Product Editor.

The settings tab used to restrict the types of items that this supplier will be requested to supply. By default these are all checked, but if you do not wish this supplier to supply any of a particular category of products remove the tick.

The miscellaneous options are whether to display the drug pack size column when building or accepting orders and whether to restrict the ordering to OTC or dispensary lines only, or not. The Ledger reference will provide a supplier ID when exporting to an accounts package and the Default Send mode allows a step to be skipped when sending orders. If you wish to send an order by another method to this default, press and hold the **SHIFT** button when clicking **Send** to display all the send options.

The EDI Data Exchange section allows you to setup how to receive your EDI delivery notes for this supplier if you are able to. Currently Mawdsleys, Phoenix, and groups



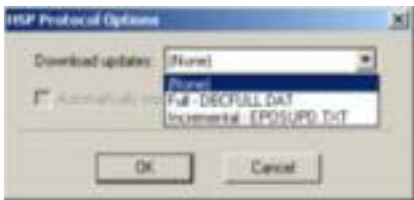

running either Head Office or Main Office can make use of this feature. Select the protocol and the phone number or IP address of the supplier, depending on how you contact them.



The Purchases tab stores a record of all orders received from this supplier.

Supplier Protocol Options

When setting up the supplier details there may be a number of options to configure for them. By default they are setup to behave in a way you would expect from any ordering system but you may need to add or change information in the options to modify the system to your usage.

If you are in any doubt about what you are changing call the CareDesk. These options may prevent Analyst placing the order in a way that you would expect.

AAH		<p>These are all technical options as many systems use the AAH protocol in slightly different ways. Do not change these options for an existing working supplier. To setup a new supplier call the CareDesk.</p>
Brewhurst		<p>Brewhurst requires your system to login. Enter the details given to you from Brewhurst in these fields. They will also send updates to your system. Select whether you want them imported automatically or not.</p>
HSP		<p>HSP sends updates to your system. Select whether you prefer the full update which will be thorough but will take longer or the incremental which will be quicker to download but will only include the current changes.</p>
IP Ordering		<p>For all suppliers using IP ordering though mainly for groups using the Positive Solutions Head Office and Main Office systems. Enter the IP address of the host system in this field. The port number should not be</p>

		<p>changed unless advised by the CareDesk or your head office.</p>
<p>Mawdsleys</p>		<p>If you have a separate supplier setup for ordering cases from Mawdsleys this option is checked for the case supplier. Do not select this option on your regular singles account.</p>
<p>Unichem</p>		<p>Unichem can send updates to your system if you opt to here. They can also be automatically imported by selecting the next option. The price can be included on the label on the labels. And the Analyst order number can be included in the Unichem order number to prevent them merging orders which have been sent is a short period of time.</p>

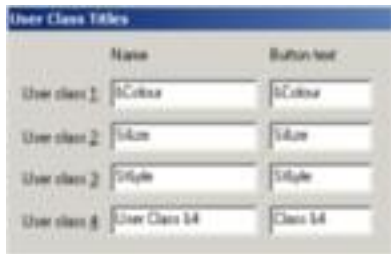
User Class Setup

User classes are a definable grouping mechanism for products. There are eight user classes which can be configured to however you wish. As an example three of the classes will be configured to track colour, size and style of small range of products.

These are accessible from **Setup, Product Groupings, User Classes**.



By default the classes are named "User Class 1" to "User Class 8", these can be changed in the **Class Titles** option.



Give the class a full title and a shortened title. If you require any keyboard shortcuts, prefix the character you wish to be the **ALT+** shortcut with an **&** (ampersand). **&Colour** will have the shortcut **ALT+C**, **Si&ze** will be **ALT+Z** and **St&yle**, **ALT+Y**.

Define the contents of the user classes by selecting them from the **Setup, Product Groupings, User Classes** menu, which will now bear the titles defined in the above section.



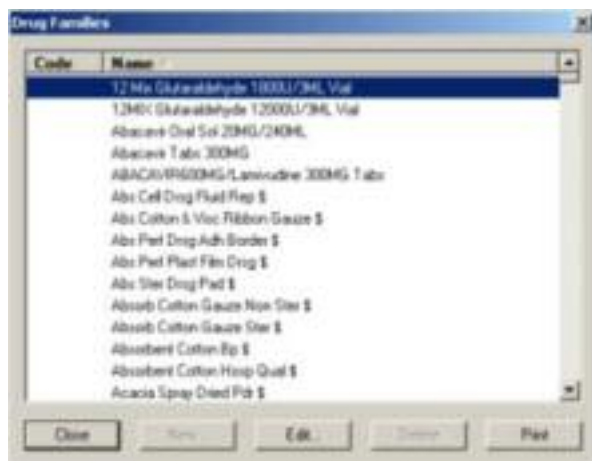
Use the buttons at the bottom of the window to build up and modify the contents of the user class. Each entry can have associated **Web Waffle** and an image for use with the web tab and its function.



Drug Family Setup

The drug families are maintained by the weekly Drug File Update and are linked to the dm+d (Dictionary of Medicines and Devices). These were once modifiable but since their link to the dm+d has been established this is no longer possible.

These are accessible for review from Analyst PMR, **Setup**, **Product Groupings** and **Drug Families**.



Some of the names contain a \$ (dollar) symbol. This is a place holder for the pack size of the drug dispensed.



The **Family code**, **Short name** and **Long name** are maintained by Positive Solutions and cannot be changed. If you prefer your own text on labels for this family type it in the **Label text** field. A family **Hit code** can also be assigned in the top right of the window.

This family can be substituted for a product using the **Product Substitute** section. This is used to greatest effect for compliance so the same item within this family is dispensed every time the family is selected. Click the find button (the binoculars) to search for the specific product to dispense when this family is selected.

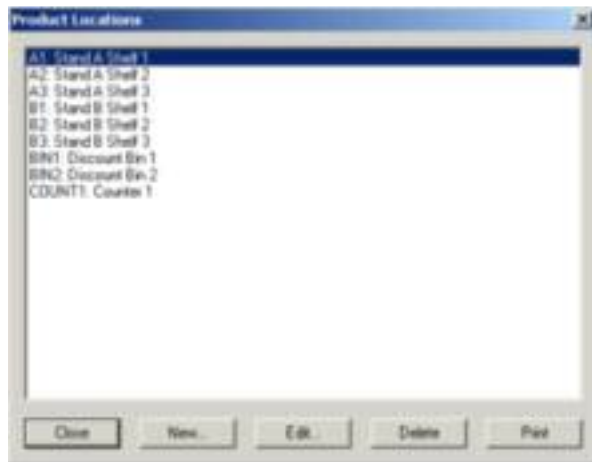


If the "Limit to restricted products initially when dispensing" option in the Options Tab of the PMR system configuration is selected then the contents of this drug family will not be displayed initially and upon the family's selection the substituted product will be dispensed.

Location Setup

The location of an item on the shop plan can be recorded and used to analyse how the layout of your shop is performing.

Initially you need to assign codes to the areas of your shop you wish to track. It is best to do this on paper before entering it into Analyst. When you are ready select **Setup** from the menu bar, then **Product Groupings** and **Locations**.



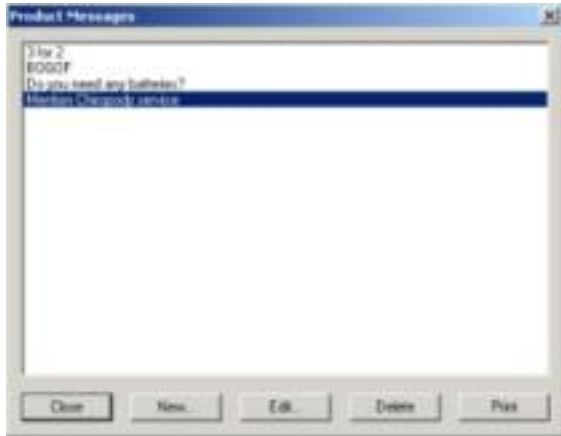
Locations can be added, edited or deleted from here by using the buttons at the bottom of the window. Each location is assigned code in the **Location** field and optionally a **Description**.



Product Message Setup

Product messages can be used as a grouping as much as a source of information to staff and customers. Messages can either display on-screen to the staff when associated products are sold or dispensed or on be printed on the receipt for the customer to view, or both. In addition, different messages can be set to appear to the staff than are printed on the receipt.

To setup Product Messages select **Setup** from the menu bar, then **Product Groupings** and **Product Messages**.



Departments can be added, edited or deleted from her by using the buttons at the bottom of the window. Each message can provide a screen message and or a receipt message, the text for which can be typed in the appropriate pane. To save tying the same message twice, the Copy buttons can be used duplicate the text from one pane to the other.



An action can be associated with the message by selecting the Play Sound option and selecting a WAV file from your system, or the Speak Message option and type the message for the synthesised voice to speak.

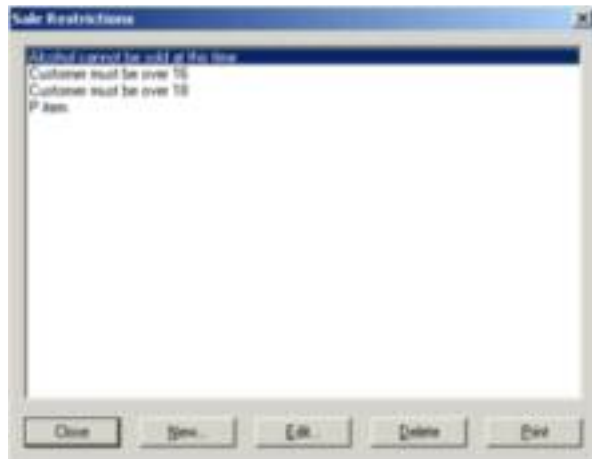
There are two checkboxes at the bottom right of the window to allow the message to be enabled/disabled when in the EPoS or PMR.

The Event Monitor section of the window is for use with the remote shop monitor package.

Sale Restriction Setup

This option is only available to Analyst PoS users. Warnings can be presented for associated products under certain conditions defined here.

To setup sale restrictions select **Setup** from the menu bar, then **Product Groupings** and **Sale Restrictions**.



Restrictions can be added, edited or deleted from here by using the buttons at the bottom of the window. Two types of restrictions can be setup. Time based or assistant based restrictions are setup in the top left and second left boxes respectively.

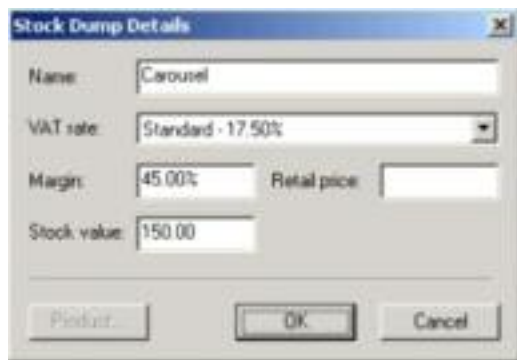


Using Stock Dumps

The idea behind a 'Stock Dump' is for ranges of products that may not be of high value and are difficult to control the stock of because of the sheer number of codes involved, or when you are not interested in tracking specific lines within the range. An example use for this feature might be a carousel of hosiery or hair accessories that are filled by a rep every week or so.

Straightforward Uncoded buttons can be used for this purpose, but provide limited reporting and absolutely no stock control, whereas a Stock Dump provides an overview of sales and stock value.

To create a Stock Dump, in the PoS software, select Setup, Product Groupings, then Stock Dump. Click on the New button and give the Stock Dump a name, such as 'Carousel'. Select a VAT rate and enter the margin that you are making on the range. If the range is all one price, enter the Retail Price, otherwise leave the field blank so the system will prompt you each time you use the facility. Finally enter the stock value at cost of the items in the Stock Dump and press OK. *This stock level once entered cannot be changed in this screen - you must subsequently use the Stock Dump Topup facility.*



Close the setup screen and return to the main screen. Now setup an Uncoded button by selecting Setup, Uncoded Buttons and then New. Select the Sale Type of Stock Dump, enter the Text you would like on the button (such as Carousel) and select the Stock Dump in the bottom right of the screen. Alternatively, if you have defined a number of stock dumps, you may wish to leave the Stock Dump combo-box set to "(Prompt)". Analyst will then display a list of stock dumps for you to select from when you use the Uncoded button.

The button can then be assigned to a Speed Sales button if you wish, or is otherwise available under the Uncoded button when in a sale.

As you sell items in a Stock Dump the VAT and margin are deducted from the Retail price to infer the cost value of the item. This value is deducted from the overall value of the Stock Dump and is reflected in the sales reports.

To accept deliveries of items within your Stock Dumps, on the Purchases screen choose the Stock Dump Topup option to enter the cost value of stock delivered.

System Configuration

The system configuration of Analyst defines the way certain features of the software behave. Software requirements vary from shop to shop and to accommodate this there are many options which allow the nature of the software to be tailored to your needs.

Some important settings are contained in system configuration so only the System Supervisor is permitted to access this section. If you need to gain access but do not know the relevant passwords to log on as the Supervisor you should contact your manager or the CareDesk. The CareDesk can provide access in an emergency or if you have genuinely forgotten the password, but for your own security will be asked who you are and why you need access to this area of the software.

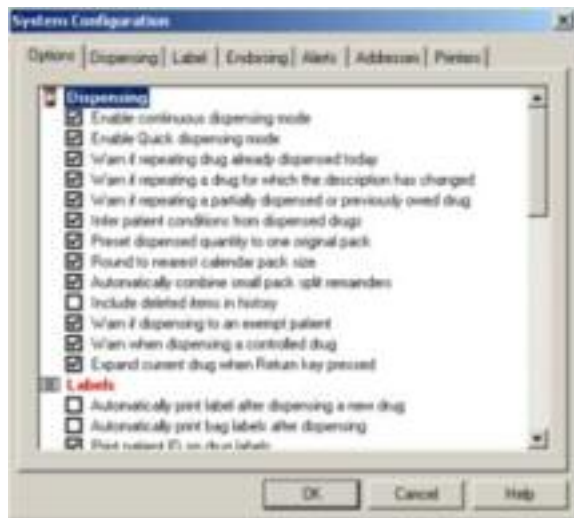
When logged on as the Supervisor select **Admin** then **System Configuration** or in Analyst Main Office select **Setup** and **System Configuration**. Analyst PoS, PMR and Main Office all have a system configuration but each has different contents. They are displayed below.



Analyst PoS System Configuration

The Analyst PoS System Configuration contains the following tabs:

- Options
- Sales
- Exchange
- Defaults
- Updates
- Miscellaneous
- IMS
- Network
- Hardware
- Printers
- Alerts
- Addresses



Analyst PMR System Configuration

The Analyst PMR System Configuration contains these tabs:

- Options
- Dispensing
- Label
- Endorsing
- Alerts
- Addresses
- Miscellaneous
- Printers



Analyst Main Office System Configuration

The Analyst Main Office Configuration contains these tabs:

- Main Office
- Printers

PoS

Options Tab

Below is as complete list of the options available in Options tab of the System Configuration of Analyst PoS. Click on the links below to jump down to the explanation for that option or scroll down to read the full list. Where the default settings are described as ON or OFF, ON indicates a tick in the box for the option, OFF indicates a blank box for the option.

Sales

Automatic Invoice at end of sale

An invoice for the complete sale will print on blank A4 paper from the printer selected as the invoice printer in the Printers tab of the System configuration. If the customer has been identified, their details will be contained in the address box on the invoice, otherwise it will remain blank. (Default setting: OFF)

Automatic receipt at end of sale

A receipt for the completed sale will print from the printer selected as the receipt printer in the Printers tab of the System Configuration. (Default setting: OFF)

Enable continuous sales mode

A new sale screen will immediately appear when the previous sale is completed, removing the need to click **New Sale** button. This option cannot be used in conjunction with 'Automatically log off at end of sale' and any blank new sale screen is subject to the 'Automatic end sale time-out' on the Miscellaneous tab of the system configuration. (Default setting: OFF)

Record amounts tendered

Analyst will require the amount tendered by the customer to be entered after declaring the payment type. The amount due will appear by default. Over payments will result in the cash drawer to open and the 'change due' to be displayed (if selected). Under payment will return to the payment type selection for further payment with the outstanding balance displayed in the sale detail. The cash drawer will only open when full payment has been received. If this option is not selected the cash drawer will open following selection of payment type and a mixed tender cannot be performed. (Default setting: ON)

Record credit card details

Analyst will require the input of the card number and expiry date of any credit or debit card used. A separate dialogue to enter the details will appear when the **Card** payment type is selected. NO PAYMENT IS TAKEN THROUGH ANALYST. The card details are not checked though if a date is entered which is earlier than the day of the sale a warning that the card has expired appears and re-entry or alternative payment will be required. (Default setting: OFF)

Show change due

If an overpayment is entered at the end of a sale though any payment type the 'Change due' will appear at the bottom of the screen at the same time as the cash drawer opens. This change is always deducted from the cash-in-drawer total regardless of which payment type was used to overpay. This option is not available if the 'Record amounts tendered' is not selected. (Default setting: OFF)

Warn if customer not identified

This displays an information panel at the bottom to warn if a customer has not been identified in the sale. The options to identify the customer now or carry on regardless are offered. (Default setting: OFF)

Set Retail Source to User Maintained following PriceOver

If an item is subject to a PriceOver during a sale and this option is selected the retail price source for the item will change to 'User Maintained' regardless of how it was maintained before. This will remove the item from any control by the database update mechanism and will require the retail price to be maintained manually. (Default setting: OFF)

Transient PriceOver- revert to previous price after sale

Price changes can be temporary using this option. Any price changes made during a sale using a PriceOver will only be for the selected line in the sale. The price in the product record will remain unchanged and further entries of the item whether in the same or a different sale will appear at the original price. This transience can be overridden by assistants given the power by selecting the 'Over-ride transient PriceOver' option in the permissions tab of their setup. PriceOvers performed by empowered assistants are permanent. The Supervisor always makes permanent price changes using the PriceOver facility. (Default setting: OFF)

Include outstanding Layaways on today's Previous Sales screen

Layaways made before today can sometimes be lost in the system as they can only be recalled if the day on which they were laid away is known . This option carries each day's outstanding Layaways onto the current Previous Sales screen making them easier to find and reducing the chance of them being lost. (Default setting: OFF)

Open cash drawer for account sales

Depending on your system for account sales the cash drawer can be permitted or forbidden from opening for account sales. No money is tendered for the sales so normally there is no need for the drawer to open. (Default setting: ON)

Warn if selling to an exempt patient

If a patient is identified in the sale and is marked as exempt a warning will appear if a NHS script is entered. (Default setting: ON)

Sale activity highlighting

An exclamation mark can be placed next to each sale on the Previous Sales screen which contain certain activities which might point to misuse or help identify a training need. Select any or all of the nine activities in the list. (Default settings: barcode correction - OFF, Cashback- OFF, Item discount - ON, Refund - ON, PriceOver- ON, Line clear - OFF, Quantity button - OFF, Sale Discount - ON, Previously laid-away - OFF)

Purchases

Show pack size in order builder

A column displaying the pack sizes of items can be displayed when building orders or when viewing built orders in the purchases section. The pack size field is only populated when using Analyst PMR. (Default setting: OFF)

Enable continuous data entry when building orders

When selected the quantity dialogue will automatically appear for the next item in the order once invoked. When not selected, each item must be selected individually and the quantity dialogue invoked to modify the quantity. (Default setting: ON)

Enable continuous data entry when receiving orders

When selected the quantity dialogue will automatically appear for the next item in the order once invoked. When not selected, each item must be selected individually and the quantity dialogue invoked to modify the quantity. (Default setting: ON)

Show re-order method buttons on Order Quantity dialogue

The re-order method of an item can be permanently changed by clicking on the preferred method on the quantity dialogue. This option is used to show the buttons to make such changes or not. (Default setting: OFF)

Graph waste figures in Order Quantity Dialogue

The monthly wastage figures can be added to the graph on the order quantity dialogue which already contains the monthly information for sales and purchases. (Default setting: OFF)

Auto re-order elsewhere if zero stock received

If an quantity received of an item on an inbound order is reduced to zero it can be flagged to re-order elsewhere/anywhere with this option. The item will be attached to any built order, for which it has an appropriate supplier code, with its original order quantity. The flag can be manually added or removed to a product on the buying tab of the product editor. (Default setting: ON)

Defer real-time ordering to end of transaction

The background replace and background auto re-order methods generate the order quantities for items as they are used in sales or dispensing sessions. On slower systems this can cause a slight but noticeable pause in the selling or dispensing process. This option allows all background re-order calculations to be performed when the sale or dispensing session is concluded which will result in longer than normal pause on slower systems but at a less noticeable and critical time. (Default setting: OFF)

Offer to merge orders before sending

If more than one built order is detected for the same supplier Analyst can offer to merge them together if one of the orders is to be sent. (Default setting: ON)

Use higher quantity rather than sum when merging

If an item exists on more than one order when orders are merged this option determines whether the highest order quantity in all of the orders or the sum of the order quantities from all of the orders are to be used. As the 'on order' field is not updated until the order is sent duplications of ordered items can occur. Manual orders can also sit side-by-side with generated orders and may contain similar items. (Default setting: ON)

Ask before marking order Inbound when printing

Printing an order is a method of marking the order as sent which will update the items on the order. If a printout is required though without marking the item as sent this option must be selected. If this option is not selected then printed orders are automatically marked as sent. (Default setting: ON)

Automatically retry failed order transmissions

Failed order transmissions will be retried 4 to 5 minutes after failure if this option is selected. The order must be manually resent if not. (Default setting: OFF)

Send scheduled orders from this workstation

Orders can be scheduled to be sent at some time in the future using the Scheduled Order Transmission facility. This option determined which terminal on the system is connected to the phone line or internet and should be responsible for the sending of orders. When this option is selected on one terminal it is de-selected on any others which may have it set. (Default setting: OFF)

Hide replies older than the purchase history window period

Completed orders can be hidden when they are older than a certain age in the 'Retain completed orders' option on the Miscellaneous tab of the system configuration. This option allows the replies to follow the same rule. (Default setting: OFF)

Mark zero stock lines counted when stock received

After a stock take when the figures in the system can be trusted this option can allow items which are delivered to be marked as counted if the initial stock level was zero. The item will then immediately start to re-order intelligently if the re-order method is set to Auto. (Default setting: OFF)

Display filtering options when creating order from shortages

Orders can be filtered from the suggested shortages screen if this option is selected. The filter dialogue contains a 'don't show this again' box which, if ticked, de-selects this option. (Default setting: ON)

Highlight non-compliant lines when building supplier orders

A column is inserted in the order builder to display an icon for lines which are displayed on the order but are not normally ordered from this supplier, which is known as Ordering Compliance. (Default setting: ON)

Reports

Edit report fields without pressing F2

The data held in the Analyst's standard grid style reports can be edited. The which can be edited contain information taken directly from the product record and any changes made are saved back immediately, are permanent and are not undoable. To prevent accidental changes being made to the data de-select this option to require F2 to be pressed before a field can be edited. (Default setting: ON)

Shelf Filling Lists

Remove refunded items if returned to stock

If an item is returned to stock when refunded it is deemed as saleable and if this option is selected its replacement which was on the shelf filling list will be removed. (Default setting: OFF)

Prompt before clearing figures after printing

Printing the shelf filling list also clears the totals so new sales of items can start to accrue on a new shelf filling list. This option provides the choice to clear or not to clear the figures when the print button is clicked. If no prompt is selected the figures are cleared automatically. (Default setting: ON)

Till Totals

Automatically print till Lifts on receipt printer

The till lift will print without prompting on the receipt printer. Duplicates can be printed from the till totals screen. (Default setting: OFF)

Require daily password to perform additional till Lifts on same day

Extra security is provided by requiring staff to call the CareDesk for a password if a second or subsequent till lift is required. The CareDesk advisor will record who has called for the password and why they require it. (Default setting: OFF)

Warn if pre-declaration outstanding for more than one hour

The pre-declaration feature requires the cash drawer to be removed, counted and declared before a total is given. If this process is not complete a warning can appear after one hour to complete the process as failure to do so can impact of subsequent totals. (Default setting: OFF)

Allow till Lifts and Bankings when running offline

Lifts and Bankings performed when running offline might cause a problem if the data is not re-processed when the data is back online. Totals may run awry. Lifts and Bankings are reprocessed as part of the procedure so can be permitted if the correct procedure is to be followed. (Default setting: ON)

Open cash drawer when performing till Checks

A till Check provides a running total of sales so the cash drawer need not normally be opened. (Default setting: OFF)

Receipt printer sections

The till totals are made up of a number of sections which are explained here. If some of the sections are not used they can be turned off to make them easier to read and to save till roll. (Default setting: all ON)

Security

Enable keyboard logon

Allows assistants to logon with their logon name and password instead of using the scanner and scanbadge. (Default setting: ON)

Start new sale after scanner logon

An assistant will save time by not having to put the scanner down and click on the New Sale button with this option selected. As soon as the scanbadge is scanned a new sale screen appears. (Default setting: ON)

Hold down shift key to prevent auto new sale

Used in conjunction with the above option this allows an alternative to the keyboard logon to access other features of the system. (Default setting: OFF)

Automatic log-off at end of sale

Logs off the current user at the end of each sale. (Default setting: OFF)

Automatic log-off at end of script

Logs off the current user at the end of each dispensing session. (Default setting: OFF)

Print receipts and invoices when no-one logged on

The **Receipt** and **Invoice** buttons are available to be used when no-one is logged on with this option selected and is usually selected in conjunction with the option above to allow receipts to be printed easily. (Default setting: OFF)

Operate in secure mode

Secure mode prevents the switching to other applications whilst Analyst is running and shuts down the terminal if Analyst is closed. Selected assistants can over-ride this option if permitted to do so. This option will not appear on Windows XP terminals as they should have their own security profiles in place. (Default setting: OFF)

Confirm assistant logon

A confirmation of who has logged on appears at the bottom of the screen with this option enabled. (Default setting: ON)

Record failed logon attempts

Attempts to logon to Analyst which have failed because of bad entry of a logon name, password, abandoned attempts or attempts to logon with the keyboard when forbidden are recorded in the Assistant Logon Activity with this option enabled. (Default setting: OFF)

Enable Win-A as hotkey for Analyst EPOS

When Analyst PoS is running the key combination of **Win+A** will bring it to the front of all other applications if this options is selected. (Default setting: ON)

Enable Win-P as hotkey for Analyst PMR

When Analyst PMR is running the key combination of **Win+P** will bring it to the front of all other applications if this options is selected. (Default setting: ON)

Panic Button**Require Ctrl key to confirm Panic situation**

To help prevent false alarms with the panic button select this option to require users to hold the **Ctrl** button whilst clicking the panic button. If it is clicked without the Ctrl button an 'Are you sure' style box appears to give an opportunity to back out of the alert. Alternatively the alarm can be confirmed or after 10 seconds the alarm is automatically confirmed. (Default setting: ON)

Notify others when Panic button pressed

Allows the transmission of the panic alert to other Analyst terminals on the system. (Default setting: ON)

Button location

Decided whether to have a panic button and where it should be located, in the title bar at the top or in the status bar at the bottom. (Default setting: STATUS BAR)

Description Search**Restrict to active products only**

The search results will not include any inactive products. (Default setting: OFF)

EPOS: Exclude products not available from default daily supplier

The search results in Analyst PoS will only include items which have a valid order code for the supplier marked as the default daily supplier in the defaults tab of the system configuration. (Default setting: OFF)

PMR: Exclude products not available from default daily supplier

The search results in Analyst PMR will only include items which have a valid order code for the supplier marked as the default daily supplier in the defaults tab of the system configuration. (Default setting: OFF)

Auto extend restricted searches if no matches

This option is only available in conjunction with either of the above to search restrictions. If no items matches the search and is available from the default supplier the search can be 'auto-extended' removing the need for the user to click the **Extend** button. (Default setting: OFF)

PMR: Sort descriptions by cost price

In PMR searches generic items with the same name can be sorted to display in cost price order. (Default setting: OFF)

Display extended description panel

Part of the search results screen is taken up with a description panel at the bottom which shows the full description of the highlighted item in the list. This helps with items with very long descriptions. (Default setting: ON)

Show price in result list

Displays the item's retail price in a column on the results list. (Default setting: ON)

Show stock levels in result list

Displays the item's stock level in a column on the results list. (Default setting: ON)

Show hit code in result list

Displays the item's hit code in a column on the results list. (Default setting: OFF)

Use large font for result list

A larger font can make the result list easier to look though but more or the description fit on and more items will be displayed in the pane if the normal font is used. (Default setting: ON)

Limit to restricted products initially when dispensing

The search whilst dispensing is initially restricted to products available from the default daily supplier unless the **Extend** button is pressed. (Default setting: OFF)

Automated Shelf Edge Labels

Automatically print labels after batch price updates

If selected this option will automatically print the shelf edge labels for items updated by an update provided by Positive Solutions, your head office or a supplier. More details of this feature can be read here. (Default setting: OFF)

Seek confirmation that labels have been printed and deployed

If the automatic shelf edge label printed has been enabled this option provides extra security that the labels have ben printed and put in place on the shelf edges. (Default setting: OFF)

Restrict labels to active products only

The update which has been applied will contain a wide range of products, some of which you may not stock. This option will restrict the printing of labels to only those that are active on your system. (Default setting: ON)

Non-deployed labels auto price-over

There may be a problem if the new shelf edge labels are not deployed swiftly after applying an update as the price displayed on the shelf edge may not match the price on the system when the item is scanned. Technically you are required to sell the item at the lowest displayed price but the system allows a number of options. The new price can be charged whether or not the new labels have been deployed, the old price can be charged if the labels have not been deployed or the old price can be charged if it is lower than the new price and the labels have not been deployed. (Default setting: ALWAYS SELL AT NEW PRICE)

Product Editor Required Fields

Certain fields in the product editor can be set as required and if incomplete a warning will appear that the item is about to be saved without this vital information being completed. Select which fields are required from: Bulk supplier, buying codes, cost price, daily supplier, department, manufacturer, product group, retail prices, selling codes and stock level. (Default setting: BUYING CODES & SELLING CODES: ON, all others: OFF)

Check field contents

The above requirements will be checked just when a new product is saved or each time the product details are save from these two options. (Default setting: ONLY CHECK WHEN SAVING NEW PRODUCT)

Miscellaneous**Enable Calculator title-bar button**

A 'Calc' button is displayed at the top of the Analyst screen which will launch the Windows calculator. (Default setting: ON)

Enable CTRL/Shift key title-bar buttons

'Sticky' CTRL and Shift keys are displayed at the top of the Analyst screen when this option is selected. It is particularly useful when using a touch screen terminal where the keyboard is secreted beneath the counter as the CTRL and Shift buttons can be used when selecting certain options to achieve a different effect than normal and will not require the retrieval of the keyboard. (Default setting: ON)

Automatically purge discontinued products

This option will make any product with a re-order method of manual and a stock level of zero inactive as part of the daily initialisation. It will not delete it from the product file so any details held against it can be retrieved by re-activating it. (Default setting: OFF)

Show cost value in till totals

The cost value of the items sold in the sales period will be displayed as part of the summary at the top of the till totals read out. This figure will only be accurate if there is an accurate cost price figure for each of the items which has been sold in the sales period. Items sold through 'uncoded' buttons cannot report a cost price. (Default setting: ON)

Allow duplicate product descriptions

If this option is off Analyst will not allow more than one item to be saved with a description identical to one already saved in the system. By turning this on duplicate items may be created and cause problems, though for some supplier updates it is required to prevent errors occurring on import. (Default setting: OFF)

Hide 'Don't show this message again' checkboxes

Most of the information dialogues within Analyst contain a 'Don't show this message again' option at the bottom left. This option can be removed to force the information pane to display. (Default setting: OFF)

Backup network transmission file, not live database

During a normal system backup the live database is backed-up onto removable media but this required the system to be closed for the duration of the backup. This is by far the preferred option, but if it is somehow impossible to do, the NTX file can be backed-up instead. The data will invariably be slightly older than the live database but it can be backed-up without closing the system. (Default setting: OFF)

Archive network transmission files

If regular archived copies of the database are required this option can be selected. Each Sunday the NTX file will be generated then copied to an NTA (Network Transmission Archive) file. These files reside in the C:\ANALYST\DATA\NTX folder with the rest of the NTX files on the server but are not broadcast to the slave terminals. The NTA files must be manually archived to removable media and/or deleted to avoid the drive being filled over time. (Default setting: OFF)

Include additional content in Head Office TSE files

This setting will provide more information to your Head Office as part of your Transaction Summary Export files which are created each day. (Default setting: OFF)

Create daily Head Office TSE files

If this system reports to Head Office then it will need to create the Head Office TSE files. These provide the Head Office with information about your daily sales. (Default setting: OFF)

Include 'Account Payment' in No Sale dialogue

Provides the facility for assistants to receive money as payment on a customer's account. This item can be withdrawn if you do not operate customer accounts. (Default setting: ON)

Include 'Account Pay-Out' in No Sale dialogue

Provides the facility for assistants to issue money to customers from their account. This option can be withdrawn if you do not operate customer accounts or do not want to issue customers with cash from their accounts. (Default setting: ON)

Warn if surname of forenames changed while editing account details

If details in the surname or forenames fields of the customer editor are changed whilst editing a customer a warning appears. This will help prevent losing customer records by deleting accidentally their name.

PSL Hawk

Multi-scan mode

Enables the multi-scan mode of the Hawk. Rather than scanning an item once and entering the quantity of that item, each and every item can be scanned and the Hawk will count the number of different lines and the number of each line scanned. Ideal for stock taking 'bargain bins' or other areas of unsorted stock.

Show bin locations

Items uploaded as part of a planned stock count will display the location field on the screen of the Hawk. This is taken from the Promo tab of the product editor.

Show current stock levels

Items uploaded as part of a planned stock count will display the stock level held by Analyst at the time of the upload to the Hawk.

Sales Tab

This tab contains sales related information and is contained in a number of sections within the window.



The Sales Periods define when Analyst will start your year, week and day. These are used for reporting purposes.

Cashback can be turned on here by placing the tick in the **Enable Cashback** box. A minimum spend and maximum cashback amount can be specified by typing the amounts in the fields.

If your system is fitted with a slip printer, cheques can be printed for your customers. Place the tick in the **Print customer cheques** box and complete the Payee field with your details. The customer's cheque guarantee card details printed on the back of the cheque by placing a tick in the **Print on reverse of cheque** box. If this is selected you will be required to select the **Record credit card details** on the options tab and the card details must be entered into the system when requested.

The Customer display messages can be customised for a "Next Customer" (when an assistant is logged on but not in a sale), "Till Closed" (when no-one is logged on) and "training Mode" (when in training mode) setting. Select the mode from the drop down box and type the message to be displayed in the field below. Special characters can be inserted by using the button next to the message field by typing the character code in as displayed in the right. The image with green text indicates what the display will look like.

In the miscellaneous section only two options will be available. The **Promo refund warning** option allows a warning to appear to staff if they refund an item that has recently been on promotion. This will ensure that the customer is refunded the correct amount. The number in this option determines the number of days the system will look back and warn of such an event.

The **Receipt footer message** is displayed at the bottom of every receipt and can be used to thank your customers or provide them with news or offers.

Exchange Tab

This section defines the communication parameters of your system to your head office (if applicable) and to Positive Solutions head office. As part of your SureCover package you are entitled to connect to our system to collect database updates, software updates and help file updates. Your system also provides a small report on the status of the system and any errors that may have occurred. This allows us to be warned of any problems that have occurred or are about to occur and helps us prevent problems from happening. We do not collect any personal or business information.

The screen is split into two halves. The details on the left are for head office communications and the details on the right are for PSL comms.

Direct dial connection

If your system will connect by dialling directly into either your head office or PSL select the modem which should be used to dial from the drop down menu and type in the phone number of the remote system. For PSL this is 01254 833320.

Internet Connection

If you can connect to the internet from the terminal which performs the data exchange you will be able to perform the data exchange to PSL via the internet which should be quicker and will certainly be cheaper. If you dial up using a modem or ISDN connection to your internet service provider (ISP) select the dial-up option which is listed in the drop down menu.

If this terminal is connected to an ADSL, cable or other broadband connection through the network select the "Local area network" option from the drop down menu.



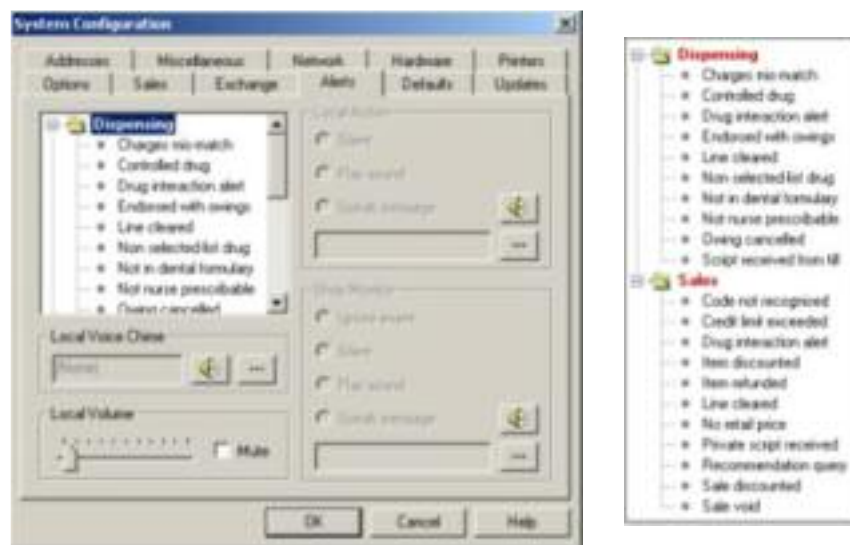
The head office side only need be completed if you are part of a group and are required to connect to your head office. Contact your administrator there and ask them for the details. Every system will need to connect to Positive Solutions at least every three weeks, but preferably every week. These details will be configured on install and should not be changed unless requested to do so by the CareDesk.

The fields are:

Account	Your unique number that identifies you to the head office/PSL system
Telephone	The modem number for the head office/PSL system. The number for PSL is 01254 833320
History (days)	How many days data is transmitted.
Send Till Totals	Sends Till Total information in addition to product information
Auto transmit	If the system is to send automatically, place a tick in the box and set the time in hh:mm 24 hour format. Click on the day to transmit, or the daily option to send every day at the time specified.
Send Data	Only select this if you are part of the PSL Data Collection Scheme and are being remunerated for your data.
Reset button	The resets the flags used to send the data to PSL. You may me asked to click on this by the CareDesk. It doesn't affect any data you use from day-to-day.

Alerts Tab

Depending on the audio capabilities of your hardware, the system can play a sound or speak a phrase for various sales and dispensing events. A list of events appears on the right below.



To nominate a sound to be played, select the event in the pane on the left of the tab and set the **Local Action** on the top right as appropriate.

If **Play sound** is selected, you will be prompted to select a WAV file from your system. This can be tested by pressing the loudspeaker icon, or changed by pressing the Browse (...) button next to the name of the WAV file. You can select a file from any directory on your computer, including network directories on other computers. Analyst will create a local copy of the sound file on your system.

If you would prefer the system to speak a message to you, select the 'Speak Message' option and type the appropriate message in the field beneath. Press the Loudspeaker button to test it. You may need to spell your word or phrase phonetically to coax the

Updates Tab

Almost all systems receive database updates. As the requirements from the update differs from shop to shop, this tab defines what changes the update will make to the system.



The miscellaneous options pane contains the fields the two main updates will change for you. You may have either or both updates applied to your system depending on your database. The main updates are the OTC update which contains C&D changes to the 80,000 line file and the Drug File Update (DFU) which is only applied to PMR and IPS systems as it contains the 20,000 line ethical database.

The options contained within the list determine which fields are updated. New products are added with all of the details. Once added though, only the fields which are checked are updated.

By placing a tick in the **Request full product file update** Analyst will receive a full product file rather than the incremental the next time a PSL Data Exchange is performed. Once a the full file has been received this tick will be removed so the system will return to requesting incremental updates. If the full update is requested and retrieved in the same week an incremental has been received and applied, the full update will need to be applied manually.

The **P-Item** option allows the selection of a sale restriction which can be applied to lines in the OTC update flagged as a P item. This is most commonly used to advise the assistant that they have just scanned a P item and to request the advise of the pharmacist.

The **External Price Updates** section allows configuration of updates from other sources. If you are the recipient of any of these, select the name of the update e.g. Numark from the **Source** box and select the default suppliers to be set against updated lines. Only suppliers with a PSL Source of "Numark" in the supplier setup will be listed in this menu. By selecting the **Force Prices** option all products included in the import will be updated regardless of the price source field in the Product Editor. All products included in the

import can have the suppliers set to the selected suppliers by checking the **Force Supplier** box. New products can be created on import by checking the **Create New Products** box although this is not recommended as import files do not contain all of the information required by Analyst.

The bottom two sections determine the source of the prices on the details tab of the products. An updated product will adopt the price of the highest option in this list where there is a price for it in the update and which is above User Maintained. If no price is found in the update for the options above the User Maintained option the price is set to 0.00. The system can therefore be prevented from updating prices by shuffling the User Maintained option to the top of the list. Re arrange the options into your preferred order by selecting the source name and using the up and down arrows to shuffle its position through the list. The DFU contains the prices of 5 suppliers which are listed in the DFU topic.

Addresses tab

Rather than typing in the same road and town names when entering new customers or patients into your system, shortcuts can be created to speed things up which are defined on this tab.



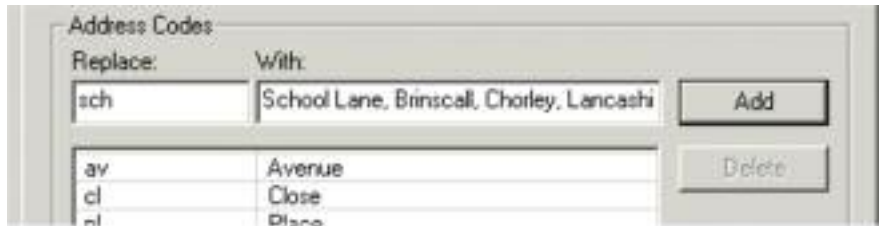
Some common options are set up already. To create a new one type in the abbreviation in the **Replace** field and the full text in the **With** field. Press the **Add** button to add the replacement to the list below.

For example "sch" when typed in the address screen could be replaced with "School Lane".



This can replace one or many lines of the address. To replace more than one line separate each address line with a comma in the **With** field. There is only one School

Lane in Brinscall so "sch" could be replaced with the full address by typing "School Lane, Brinscall, Chorley, Lancashire, PR6 8QP" in the **With** field.



Using Address Short Codes

When entering an address in the customer/patient record, type in their house number then the short code.



Each address line can contain any number of address short codes, which Analyst will expand upon exit from the field, by pressing **Tab**, or clicking on another field.



Adding Short Codes in the Address Screen

Address short codes can be added without the need to go into the System Configuration. For a single address line short code, type the address line in as normal and add your preferred short code prefixed by '='. For example to create a short code for Park Avenue, type "101 Park Avenue=pkav". As the next field is highlighted, the '=pkav' is removed from the display but added to the short code index. Now "103 pkav" can be used to add their neighbours. Analyst automatically removes any numbers at the start of replacement text entered in this way, since not everyone will live at number 101.



These are then added to the addresses tab of the system configuration and can be edited as normal if required.

Postcode Lookup

The system can also make use of the postcodes in your system as they accumulate to speed up entering addresses. This is covered in the New Customers topic.

Miscellaneous Tab

This tab contains options which don't tend to fit into other groups of options, but are nonetheless important.



The **Description Search Modes** for the PoS and PMR software determines which section of the database is initially displayed following a description search. This can of course be changed from within the search results window, but set the default in these options to be the most commonly used. "All" lines can be displayed or the lists can be restricted to "OTC" lines or "Dispensary" lines.

Automatic Logon at Startup ensures that the specified assistant is logged on when Analyst is launched. For security purposes, this should not be Supervisor.

The **Till Totals** box contains the next Lift number for this terminal. This should not be altered unless instructed to by the CareDesk. If this number is reduced, the new number entered will be honored, but will overwrite the details of the previous lifts with the same number.

Default Case-Order Rounding defines the method of rounding to be used in this feature. The threshold field becomes available if the "Use Threshold" option is selected from the menu. Click here to find out more about the case order rounding feature

The **Automatic Order Completion** option allows sent orders to be either automatically accepted or cancelled after the specified number of days. The Mode box selects whether the orders will be accepted to update the stock as though all items have been delivered or will be cancelled as though no stock has been delivered. NOTE: Use this feature with caution as stock levels of items will go awry quickly when active.

The **Retain Complete Orders** option allows completed history to be displayed for however many days are specified here after which time they are hidden to prevent the

purchases screen becoming cluttered. Orders are not deleted or removed from the system when they exceed this number of days, they are simply not displayed. This can be modified at any time and after refreshing the purchases screen all orders completed within the new number of days are displayed. Enter 0 (zero) in this field for all completed orders to be hidden from view.

The **Automatic End Sale time out** allows the PoS terminals to automatically return to the Previous Sales screen if no activity is detected in a blank New Sale screen after the amount of time specified in this field. This closes another security loophole left by an assistant leaving the till in this screen or by using the Continuous Sales Mode. If your security settings are set to log off the assistant at the end of sale, this is honoured when the system automatically ends the sale.

The **Report Description Truncation** option defines the default description truncation for all standard grid style reports. These are explained in Truncating Long Descriptions and can be overridden in each report by using the Report Options.

IMS Tab

This tab will only be displayed in systems which collate and sent their PMR dispensing information to IMS.



The Pharmacy ID, name and address are at the top of the tab. This will be setup initially and should not be changed unless under instruction from the CareDesk or IMS. The cut-off time is specified in the bottom left panel and defines the start/end of the week for data purposes. On the right the two methods of data exchange displayed for selection. This will normally be PSL data exchange.

The information pane on the bottom right displays a summary of the last export of data for IMS. The date and sequence number identify the export and when it was performed. The item count is the number of items which were linked to prescribers and the percentage of the total number of items that represents. The prescriber count is the number of prescribers linked to a surgery with a full address and the percentage of all prescribers that represents. Items not linked to a prescriber and prescribers not linked to a surgery are not useful to IMS. If the percentage of data is above the threshold prescribed by IMS it is displayed in green. If it has fallen below the threshold it is

displayed in red. If in red the data is deemed of poor quality and is rejected. This will result in non payment from IMS.

Network Tab

This is the first of two tabs protected by a password. This window will display when you try and enter this tab.



Settings on this tab can have a significant impact on the operation of the terminal or system and are of a technical nature. Access is restricted to ensure that the settings are not accidentally or maliciously changed. The single-use password can be obtained from the CareDesk by quoting the access code displayed in the security window, but the advisor will need to know who you are and why you need access to this tab before generating the password for you. This is to protect you and your staff from any avoidable system failures. Depending on what you wish to do, the advisor will help you make the relevant changes to the settings.



In the **Network** box, the Network ID is the terminal number on the system. This must be unique on your system and generally follows the convention of your normal till numbers and 99 as the admin terminal if it is not a PoS terminal. The **Stand alone** option should only be checked if the system is not connected to a network as selecting this option prevents any network broadcasts from this terminal. The **Make HQS files** option should only be selected if you are part of a group and only on one terminal. This option generates a file for head office when Analyst is launched on the terminal with this option selected. This would normally be the admin terminal or the least busy PoS terminal.

The **PMR Link** section is redundant.

The **Network Transmission Files** section configures the Network Transmission File (NTX) Manager. It is wise to store some NTX files in case of any problems, but they can be quite large. A compromise is to store around 3 files, but if you have plenty of capacity on your system this number can be increased. On the server/master terminal, the **Auto build** option should be selected and a time specified in 24 hour format. This time is usually overnight so if Analyst is left running, at the specified time this terminal will close Analyst around the system, build an NTX file and distribute it around the network. The **Auto build** option should not be selected if this terminal is not the server/master.

The **Server IP Addresses** fields are optional to complete, but is recommended. Enter the IP addresses of the servers you have in your system and press the ! button to ping it. This terminal will ping the servers regularly and warn if there are any network problems before you rely on the network mid-sale.

The **File Locations** section specifies the network locations of the various files required by the system. The paths on the left can be typed in or can be browsed for by using the button adjacent to the fields. The **server** path is where the system database is stored. It is crucial that all terminals on the system use exactly the same database. The **local** path is where the local database is stored in case of network failure. The **backup** path is where the backup files will be copied to when the Backup Databases option is selected from the Admin menu.

The **PMR** link is redundant. The **TRN Mirror** allows a duplicate the raw transaction files to be located elsewhere on the system in addition to the local hard drive so that in the event of a system failure, no data will be lost. Type in the network path or use the browse button to specify the location for these files. The **Max TRN files** determines how many day's worth of raw transaction files are stored. It is recommended to have this set fairly high, around 30-50, as they are extremely small and in the event of disaster can be very useful.

Hardware Tab

This is the second tab protected by a password. This window will display when you try and enter this tab.



Settings on this tab can have a significant impact on the operation of the terminal or system and are of a technical nature. Access is restricted to ensure that the settings are not accidentally or maliciously changed. The single-use password can be obtained from the CareDesk by quoting the access code displayed in the security window, but the advisor will need to know who you are and why you need access to this tab before generating the password for you. This is to protect you and your staff from any avoidable system failures. Depending on what you wish to do, the advisor will help you make the relevant changes to the settings.



These settings relate to the peripherals which are connected to this terminal and will be set by your installer, engineer or trainer. Most of the settings require the selection of the correct driver and port number that the peripheral is connected to. The combination of terminals and peripherals is almost endless so will not be laboured in this guide.

If you have any reason to doubt that your peripherals are not functioning correctly, call the CareDesk who will determine the correct configuration settings for your combination terminal and peripherals.

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.



The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive labels rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

The Label sheets which are a standard Avery size and perforated card sheets are available from our Consumables Department on 01254 833330.

The **Invoice Printer** should be an A4 printer.

The **Slip Printer** is used for printing customer's cheques and/or endorsing prescriptions in the PMR.

The **Report Printer** should be an A4 printer as it is used for the printing of all reports, MAR forms, picking lists and transfer advice notes.

The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

PMR

Options Tab

Below is as complete list of the options available in Options tab of the System Configuration of Analyst PMR. Click on the links below to jump down to the explanation for that option or scroll down to read the full list. Where the default settings are described as ON or OFF, ON indicates a tick in the box for the option, OFF indicates a blank box for the option.

Dispensing

Enable continuous dispensing mode

With this option enabled the patient search dialogue will appear immediately after ending a session. This can speed up the dispensing rate by removing the need to click the **Search** button at the start of each session. If a new session is not required the search dialogue can easily be dismissed to access the other functions of the system. (Default setting: ON)

Enable quick dispensing mode

The quick dispensing mode allows items to be dispensed to a patient who is not and will not be stored permanently in Analyst. This method of dispensing is only suitable for shops in areas with many transient visitors, such as tourist resorts. By enabling this setting the **Quick** button on the previous sessions screen illuminates and is available for use. (Default setting: ON)

Warn if repeating drug already dispensed today

A warning will appear on screen if the same drug or item from a patient's history is repeated more than once in a single day. (Default setting: ON)

Warn if repeating a drug for which the description has changed

A warning will appear on screen if the description for a drug has changed since last dispensed to a patient and the repeat function is used. The description on the label and in the new entry in the history will always be the new description. This warning can act as a prompt to point out the change to the patient to avoid any confusion on their part. (Default setting: ON)

Warn if repeating a partially dispensed or previously owed drug

A warning will appear on screen if an item is repeated where the prescribed quantity and dispensed quantity differ. The quantity displayed on the history screen is amount dispensed, but repeats use the quantity prescribed which can lead to errors if not noticed. (Default setting: ON)

Repeat Private script items as Private script items

If a repeat is performed on a private script in the patient's history the script type will default to 'Private' for the repeat if this option is ticked. (Default setting: ON)

Infer patient conditions from dispensed drugs

Most of the drug in the database are associated with a condition or number conditions. By activating this option a list of possible conditions the patient may be suffering from appears. By counselling the patient it can be determined which conditions they are and are not suffering from. These responses are held in their record and can be used to highlight any adverse drug reactions which may arise by dispensing medication unsuitable for patients with certain conditions and to provide a generally higher standard of care through a better understanding of their situation. (Default setting: ON)

Preset dispensed quantity to one original pack

This time saving option pre-enters the pack size into the quantity dialogue when dispensing. It is also the focus of the screen and can be changed simply by typing in the desired amount. (Default setting: ON)

Round to nearest calendar pack size

By selecting this option calendar packs are deemed un-splittable and any quantity entered for them will be rounded to the nearest full pack size. (Default setting: ON)

Automatically combine small pack split remainders

Without this option selected Analyst will print a dispensing label for each pack and each part pack dispensed to a patient. This is inconvenient though if there are only a few tablets/caps left over from pack and the remainder are frequently placed in the box with a full pack and the quantity on the label reflects this by using the **Combine** button on the drug quantity dialogue. If this practice is commonplace this option can be selected and where the remainder of a pack is less than one third of a full pack it is automatically combined with a full pack. (Default setting: ON)

Include deleted items in history

This option displays deleted activity in the patient history pane. The deleted items are clearly marked and no editing or repeating of them can be performed. (Default setting: OFF)

Warn if dispensing to an exempt patient

A warning will appear when a patient marked as exempt is identified and prompts to check that parts 1 and 3 are correctly completed as failure to do so will result in a reduction in payment to the pharmacy. (Default setting: ON)

Warn when dispensing a controlled drug

A warning will appear when a drug marked as a 'controlled drug' is dispensed. (Default setting: ON)

Expand current drug when Return key pressed

The details of the highlighted are displayed in the product editor when the return key is pressed in the dispensing screen with this option selected. (Default setting: ON)

Warn when dispensing a Select List Scheme drug

A warning will appear if an SLS drug is dispensed. Ensure that the script is marked as 'SLS' otherwise remuneration will not be received. (Default setting: ON)

Warn when dispensing a drug with multiple charges

A warning will appear when a drug is dispensed which attracts more than the standard single NHS fee from the patient. (Default setting: ON)

Warn if dispensing the wrong drug for a generic prescription

A warning is displayed if a non-compliant drug is dispensed. (Default setting: ON)

Labels**Automatically print label after dispensing new drug**

The labels will print immediately after dispensing an item rather than printing all labels at the end of the session. (Default setting: ON)

Automatically print patient label after dispensing

The patient label contains the name and address details of the patient and it intended to be attached to a Patient ID Card. A label will only be printed for a patient if one has not already been printed. (Default setting: OFF)

Automatically print bag labels after dispensing

A 'bag label' will be printed for the patient at the end of the session. A bag label contains the patient's name, address and optionally the number of items in the bag and their phone number. (Default setting: OFF)

Print patient ID on drug labels

The unique patient number is printed on the drug labels and bag label. This will mean nothing to the patient but can resolve confusion for the pharmacy in the event of more than one patient with the same or very similar names. (Default setting: ON)

Print barcode on bag labels to scan when drugs handed to patient

The barcode can optionally be printed on the bag label. This can be scanned to confirm that the bag has been handed to the patient or their representative. When this option is selected an extra column will be displayed in the Previous Scripts, Dispensing screen and on the drug history tab of the patient editor to hold an icon which will appear when the barcode has been scanned. (Default setting: ON)

Print patient phone number on bag labels

Prints the patient's phone number on the bag label if one is listed in the patient's record. (Default setting: ON)

Print number of items on bag label

Prints the number of items or packs which have been dispensed in the session on the bag label. If the prescription for an item has been split into a number of drug packs the number of items reflects the number of separate packs are in the bag. (Default setting: ON)

Print barcode on patient label

This option prints a barcode on the Patient ID Label which can be scanned into the PMR to identify the patient rather than searching for them. (Default setting: ON)

Print barcode on Owings label

When the owings label is returned to the pharmacy for collection the barcode can be scanned to access the records immediately rather than having to search for the record manually. A scanner must be attached to the dispensing computer for this to be of use. (Default setting: ON)

Highlight loan items on drug label

If this option is selected an extra line on the label indicates this item is a "loan item". (Default setting: OFF)

PMR Label Cutting

If your label printer is fitted with a cutter, quite when it will cut the labels will depend on your preferences. Select one of the following options: (Default setting: CUT AFTER EACH DRUG)

- Never cut labels.
- Cut after each label.
- Cut after each drug. This will leave all labels for the same item on the script attached.
- Cut after each dispensing session. This will leave all labels for the same session attached.

Repeating deactivated drugs

From time-to-time items which are not used very often may be made inactive to keep the system running smoothly. This will also mean that some items may appear as inactive in a patient's history and these options determine how to handle these items when a repeat of them is required. Select one of the following: (Default setting: DISPLAY WARNING)

- Repeat drug and reactivate product.
- Display warning before repeating and reactivating.
- Prevent repeating of deactivated drugs. An alternative item must be searched for.

Prescriber identification

Analyst has the ability to store who has prescribed each prescription but it is optional to turn it on. Select one from the following: (Default setting: NEVER PROMPT)

- Never prompt for doctor
- Always prompt for doctor
- Prompt if the patient has no assigned doctor. The prescriber will be marked as the assigned doctor unless manually changed.

BAN/rINN patient labels

Items which have changed names as a result of the standards shifting from BAN to rINN can optionally have an information label printed: (Default setting: PRINT LABEL FOR REPEATED DRUGS)

- Do not print name-change labels
- Always print name-change labels
- Print name-change label for repeated drugs

Description Search**Restrict to active products only**

The search results will not include any inactive products. (Default setting: OFF)

Auto extend restricted searches if no matches

This option is only available in conjunction with either of the above to search restrictions. If no items matches the search and is available from the default supplier the search can be 'auto-extended' removing the need for the user to click the **Extend** button. (Default setting: OFF)

PMR: Sort descriptions by cost price

In PMR searches generic items with the same name can be sorted to display in cost price order. (Default setting: OFF)

Display extended description panel

Part of the search results screen is taken up with a description panel at the bottom which shows the full description of the highlighted item in the list. This helps with items with very long descriptions. (Default setting: ON)

Show price in result list

Displays the item's retail price in a column on the results list. (Default setting: ON)

Show stock levels in result list

Displays the item's stock level in a column on the results list. (Default setting: ON)

Show hit code in result list

Displays the item's hit code in a column on the results list. (Default setting: OFF)

Use large font for result list

A larger font can make the result list easier to look though but more or the description fit on and more items will be displayed in the pane if the normal font is used. (Default setting: ON)

Limit to restricted products initially when dispensing

The search whilst dispensing is initially restricted to products available from the default daily supplier unless the **Extend** button is pressed. (Default setting: OFF)

Patient alerts at start of dispensing session

The patient alert will appear as a pop-up at the start of the dispensing session if any of the options below are selected and trigger the pop-up. If more than one option triggers the pop-up all warnings, notices and reminders are displayed in the same window, not separate ones.

Display 'information' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'information' in the patient alerts section of notes tab in patient editor. (Default setting: OFF)

Display 'warning' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'warning' in the patient alerts section of notes tab in patient editor. (Default setting: OFF)

Display 'stop' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'stop' in the patient alerts section of notes tab in patient editor. (Default setting: ON)

Display 'counselling' patient alerts

A patient pop-up will appear as dispensing commences displaying comments recorded as 'counselling' in the patient alerts section of notes tab in patient editor. (Default setting: OFF)

Display list of triggered patient flags

Triggered patient alerts will display in the patient pop-up. (Default setting: ON)

Display list of patient allergies

Confirmed allergies are displayed in the patient pop-up. (Default setting: ON)

Display list of known medical conditions

Medical conditions which have been confirmed positive by patients are displayed in the patient pop-up. (Default setting: ON)

Remind about child-proof containers

If the patient has been flagged to receive child-proof containers this reminder will be displayed in the patient pop-up. (Default setting: ON)

Patient editor required fields

Certain fields in the patient editor can be set as required and if incomplete a warning will appear that the item is about to be saved without this vital information being completed. Select which fields are required from: Card ID, CHI number, Date of birth, Doctor name, NHS number, Postcode, Sex, Surgery name. (Default setting: all OFF)

Check field contents

This option determines when the system will check for the missing fields defined in the option above. This can be whenever a patient's details are saved, whenever a new patient's details are saved or whenever a patient is dispensed to. (Default setting: Whenever saving a new patient)

Repeatable prescriptions**Automatically advance to the next item after repeating each drug**

At the start of the repeat dispensing session the items covered by the repeat instruction will float to the top of the list with the top item highlighted. With this option selected the highlight moves to the next item after the first one has been dispensed and allows for fast and seamless dispensing using only the keyboard. If this option is not selected the newly dispensed item will be highlighted. (Default setting: ON)

Warn user if they have not completed the pre-dispensing checklist

With this option selected a pop-up warning will appear if the pre-dispensing checklist has not been changed from the default of 'Not actioned'. (Default setting: ON)

Print barcoded label if patient not present for pre-dispensing checklist

This option enables the printing of a barcoded bag label if the option 'Patient not present' is selected in the pre-dispensing checklist. When the patient collects their medication and the pre-dispensing checklist questions are answered by them the barcode can be scanned to display the pre-dispensing checklist which can then be marked as 'Completed'. (Default setting: ON)

Offer to print patient reminder poster when final GPRD is dispensed

At the end of the session in which the final GPRD is dispensed a pop-up message will appear and offer to print a patient reminder poster. (Default setting: ON)

Serial dispensing**Print all drug labels on first instalment**

With this option selected the 'Print all drug labels on first instalment' option on the dispensing schedule dialogue will default to be ticked. (Default setting: OFF)

Recalculate schedule as dispensing dates change

With this option selected the 'Recalculate schedule as dispensing dates change' option on the dispensing schedule dialogue will default to be ticked. (Default setting: ON)

Schedule instalments over 7 days, rather than 14

This option will set the default dispensing schedule period to 7 days and will grey out days 8 to 14 in the schedule. These can be accessed by clicking the '14 days' button. (Default setting: OFF)

Warn if any instalments have not been collected

If a patient has missed any instalments of their medication a warning will appear at each subsequent issue of medication.

Dispensing days

Define here the days you will be dispensing the serial medication. This forms the basis of the dispensing schedule dialogue, though each schedule can be changed on a per person basis so there is no need to change this for every bank holiday. (Default setting: All ON except Sunday)

Miscellaneous

Restrict doctor list to current surgery

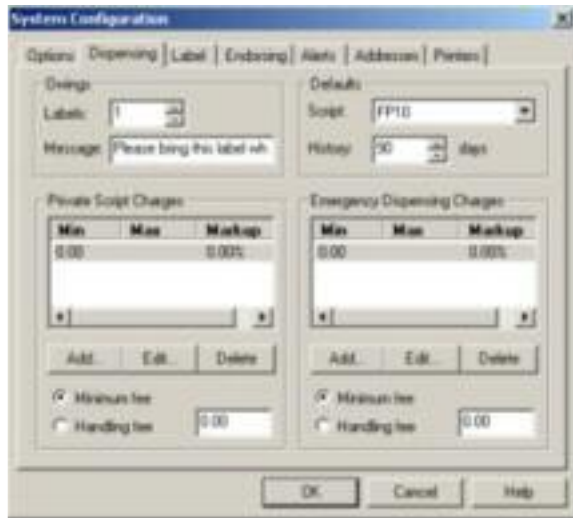
When editing patients the list of doctors is restricted to those practicing in the selected surgery. Select this option to list all doctors in the patient editor regardless of the surgery selected. (Default setting: OFF)

Warn if surname of forenames changed while editing patient details

If details in the surname or forenames fields of the customer editor are changed whilst editing a patient a warning appears. This will help prevent losing patient records by deleting accidentally their name.

Dispensing Tab

More dispensing options are displayed on this tab.



The number of **Owings** labels to be printed when an owing is generated is specified in the top left section along with the message to be printed on it. By default the message reads "Please bring this label when you return to collect your medicine" but it can be changed to read however you wish.

In the top right there are a couple of **Defaults** to select. The **Default Script** should be the most commonly processed script type. When you then receive other script types you can change from the default type during the dispensing session. The **Default History** determines how much of the patient's history is displayed during a dispensing session. Interaction checking will only operate on drugs that have been dispensed in this time period. Each customer also has their own history setting in the patient setup which overrides this setting on a per-patient basis. This can be used to view more or less of their medication history and be check for interactions.

The **Private Script Charges** and **Emergency Dispensing Charges** are specified in the bottom portions of this tab. Both are configured in the same way but are quite separate. Press the **Add** button to create a new charge.



A new 'charge band' box appears. For a uniform fee structure, leave the minimum price at 0.00 and just enter the markup. To enter a new band type in a minimum price for the new band and the new markup level. The price entered is the cost price of the medication. If the cost enters a higher tier the whole cost is taken into account when applying the markup, not just the portion in the upper band.

The charge can also be subject to a **Minimum Fee** which is the least the customer will be charged, or a **Handling Fee** which will be charged in addition to any drug cost + markup.

Endorsing Tab

The details on this tab ensure that prescriptions are accurately and fairly endorsed. Most of the options are self-explanatory, but less obvious options are explained next to the image.



Endorsing Options

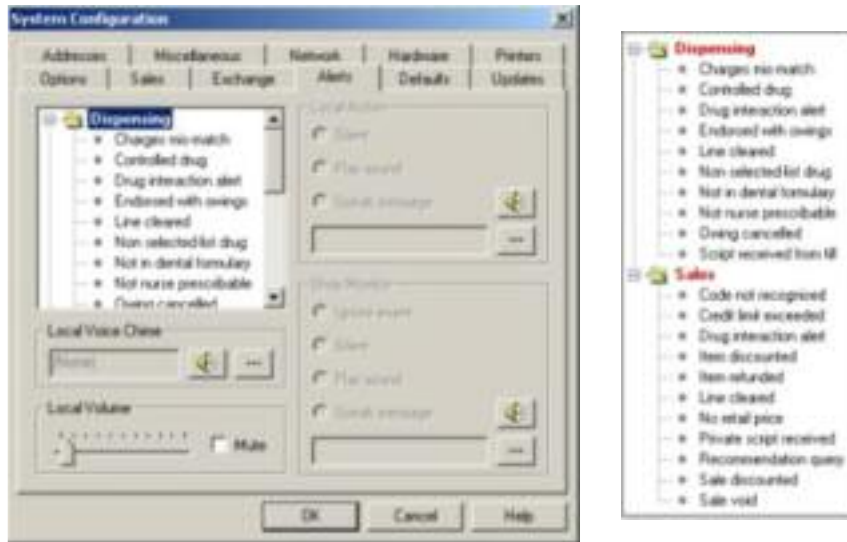
"Warn when endorsing scripts with outstanding owings" prompts with a warning that you may be endorsing as though the full amount has been dispensed when an owing is outstanding.

Pharmacy Stamp

Type in your Pharmacy details in the fields at the bottom of the window. Each field represents a line and has a limit of 20 characters.

Alerts Tab

Depending on the audio capabilities of your hardware, the system can play a sound or speak a phrase for various sales and dispensing events. A list of events appears on the right below.



To nominate a sound to be played, select the event in the pane on the left of the tab and set the **Local Action** on the top right as appropriate.

If **Play sound** is selected, you will be prompted to select a WAV file from your system. This can be tested by pressing the loudspeaker icon, or changed by pressing the Browse (...) button next to the name of the WAV file. You can select a file from any directory on your computer, including network directories on other computers. Analyst will create a local copy of the sound file on your system.

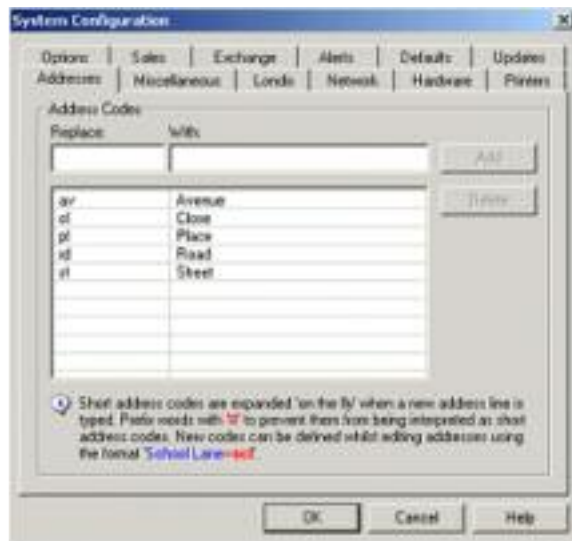
If you would prefer the system to speak a message to you, select the 'Speak Message' option and type the appropriate message in the field beneath. Press the Loudspeaker button to test it. You may need to spell your word or phrase phonetically to coax the system into pronouncing it correctly. This latter option requires the Microsoft Speech API to be installed on your computer. If the **Speak message** radio button is disabled on your system, contact the CareDesk for a copy of the install pack for this feature.

The volume can also be altered on this screen by using the slider, or muted altogether by checking the **Mute** box.

The **Event Monitor** feature is not currently used, but will be developed to broadcast sounds for these events across through the network in your shop to a client elsewhere in the building. Call the sales team on 01254 833300 if you would like more information on the potential of the Event Monitor.

Addresses tab

Rather than typing in the same road and town names when entering new customers or patients into your system, shortcuts can be created to speed things up which are defined on this tab.

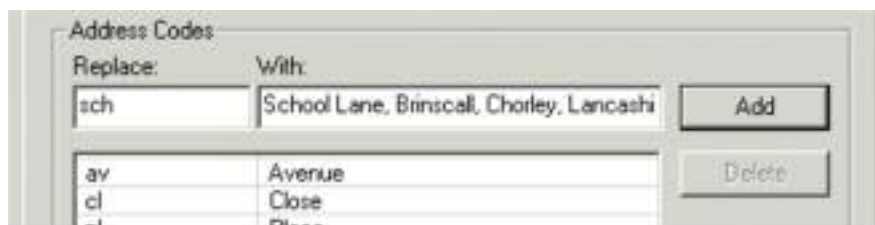


Some common options are set up already. To create a new one type in the abbreviation in the **Replace** field and the full text in the **With** field. Press the **Add** button to add the replacement to the list below.

For example "sch" when typed in the address screen could be replaced with "School Lane".



This can replace one or many lines of the address. To replace more than one line separate each address line with a comma in the **With** field. There is only one School Lane in Brinscall so "sch" could be replaced with the full address by typing "School Lane, Brinscall, Chorley, Lancashire, PR6 8QP" in the **With** field.



Using Address Short Codes

When entering an address in the customer/patient record, type in their house number then the short code.

The screenshot shows a 'Customer Details' form with the following fields: Surname: Bloggs; Forenames: Joe (with a dropdown menu set to Mr); Address: 215 Sch; Post code: (empty); Card ID: 1.

Each address line can contain any number of address short codes, which Analyst will expand upon exit from the field, by pressing **Tab**, or clicking on another field.

The screenshot shows the 'Customer Details' form with the address field expanded to include short codes: 215 School Lane; Brinscall; Chorley; Lancashire; Post code: PR5 9QP; Card ID: 1.

Adding Short Codes in the Address Screen

Address short codes can be added without the need to go into the System Configuration. For a single address line short code, type the address line in as normal and add your preferred short code prefixed by '='. For example to create a short code for Park Avenue, type "101 Park Avenue=pkav". As the next field is highlighted, the '=pkav' is removed from the display but added to the short code index. Now "103 pkav" can be used to add their neighbours. Analyst automatically removes any numbers at the start of replacement text entered in this way, since not everyone will live at number 101.

The close-up shows the address field containing the text "101 Park Avenue=pkav".

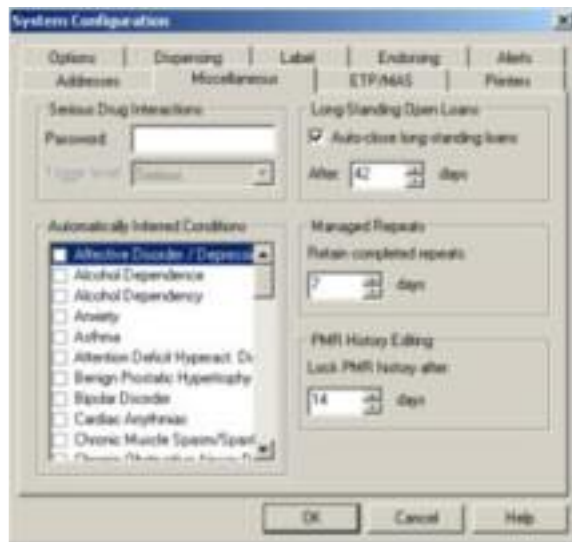
These are then added to the addresses tab of the system configuration and can be edited as normal if required.

Postcode Lookup

The system can also make use of the postcodes in your system as they accumulate to speed up entering addresses. This is covered in the New Customers topic.

PMR Miscellaneous Tab

Miscellaneous options within the PMR are contained on this tab.



Serious Drug Interactions can be set to require a password to dismiss the warnings by typing the password in this field. If this is left blank no password is required. Once a password has been entered select the level at which password entry becomes necessary. In the event of a locum not knowing the password, the Daily Password from the CareDesk will suffice.

Open Loans can be automatically closed after the specified amount of time if required. Place a tick in the check box and specify the number of days loans should remain open for before being automatically closed.

The **Automatically Inferred Conditions** section determines which conditions, as you would expect, are automatically inferred by Analyst whilst dispensing when the feature is enabled. Remove the ticks next to the conditions which should not be inferred.

The **Managed Repeats** option is used keep completed repeats displayed on screen for the number of days specified here. Set this to '0' (zero) if you wish them to disappear immediately when complete. They are not removed from the system, simply hidden from view.

By default the PMR history is locked from being edited once it is two weeks old. This can be changed in the **PMR History Editing** field by changing the limit at which the history becomes locked. This can be set to a maximum of six months (180 days).

ETP Tab

This tab contains various settings which relate to Electronic Transfer of Prescriptions (ETP).



The options in the top pane are explained below in detail.

The options at the bottom of the window provides Analyst with the addresses and port numbers of the ETP Manager and ETP Gateway. The ETP Manager is the Analyst device which handles and encrypts communications between the Analyst terminals and the ETP Gateway and usually runs on a terminal in your pharmacy. The ETP Gateway controls and further encrypts the data flow between ETP Manager and the Spine and usually runs at a third party premises whose responsibility it is to maintain this link. Once these addresses are entered and tested they should not be changed again unless under the advice of the CareDesk.

Dispensing

Automatically advance to next item after dispensing each drug

When dispensing a script with more than one ETP item the highlighted item in the list will move down as the previous item is dispensed. This makes dispensing quicker and easier as long as items are dealt with in the order they are displayed. Items can be scanned and matched whether this option is selected or not. (Default: Off)

Patient Matching

Allow matching patient record on NHS number alone

When a match is found between the Analyst record and the details on the Spine the patient's name and address can be used to confirm the match in addition to the NHS number. This can be restricted to use only the NHS number if the information in your system is accurate and the previous method suggests other erroneous matches. (Default: Off)

Ask before updating patient record with Spine details

When selected a warning will appear when the details held on the Spine for the matched patient are different from those held in Analyst. Otherwise the details will be updated to match the Spine automatically. (Default: On)

Update patient record with the name details from Spine

This will update the name of the matched patient with that held on the Spine. (Default: On)

Update patient record with the address details from Spine

This will update the address of the matched patient with that held on the Spine. (Default: On)

Workflow

Periodically warn if scripts have not been released from the Spine

If selected a warning will appear to warn that the Spine is not releasing scripts. If this persists you may need to check your connection to the Spine is intact. (Default: On)

MAS Tab

This tab contains various settings which relate to the Minor Ailments service (MAS). Some of the options on this page will only be relevant in Scotland and may only work if Analyst is configured for the NHSScotland Minor Ailments service.



The options in the top pane are explained in detail below.

The options beneath the pane are the printing options associated with the CP2. On the left select the printer which stores the blank CP2s, which bin they are in if it is a multi-bin printer and which way round the orientation of the paper is. Use the small printer button to perform a test print and use check whether the test marks are aligned with the CP2 by holding both sheets up to the light. printed image can be moved to the left and right by placing the number of millimetres to be moved in the Left Margin field (-ve numbers move the image left, +ve move the image right). A similar operation can be performed to move the image up or down on the page by using the Top Margin field (-ve numbers move the image up, +ve numbers move the image down).

All CP2 forms are numbers sequentially and the last number printed is displayed here. This can be changed manually, though ordinarily shouldn't unless a backup has been restored or an engineer has performed a action such as a HDD swap which may have caused to the number to change. Locate the last CP2 to be printed and type in characters 7 to 12 inclusive into this field to resume the sequential numbering.

Dispensing

Allow dispensing of non-formulary products

This will allow the dispensing of items not listed in the MAS formulary during a MAS consultation. This may result in non-payment by NHSScotland though. (Default: Off)

Prescribe products generically where possible

This will print the generic family name on the CP2 wherever possible. This option should be used with caution until the database of products contains the manufacturer of all items. Until then the endorsement may be less complete with this option than by using the proprietary name. (Default: Off)

Allow editing of completed consultations

When selected, certain aspects of a completed consultation may be edited. These include the notes which have been typed in. No information which was included in the report to the e-Pharmacy Store can be changed once completed though. (Default: Off)

Include pharmacy stamp on printed forms

This will include the details of your pharmacy on the top right of the CP2 if you prefer not to stamp it yourself. (Default: On)

Description Search

Exclude non-formulary items from description search results

The restriction on non-MAS formulary items being displayed in the drug search results can be lifted by selecting this option. Items displayed in the unrestricted search results which are in the MAS formulary are displayed with a MAS icon next to them. Selection of an item not in the formulary will only be permitted if the top option on the dispensing section is selected. (Default: On)

Include both OTC and dispensary items in search results

Most Analyst PMR systems are configured to display the dispensary search results by default which is not always appropriate for a MAS consultation. Select this option to display both the OTC and dispensary items as though the All button has been pressed.

Workflow

Suggest MAS consultation when selecting a MAS-registered patient

When searching for a patient as part of a normal dispensing session if they are registered for the MAS Analyst will pop-up the option to start a consultation rather than a regular session. This has the advantage of rolling this patient on the capitation report for 12 months from this consultation. (Default: Off)

Periodically warn if there pending MAS claims

If there are claims which cannot be processed due the CHI numbers of involved patients not being known a warning can pop-up periodically to warn of them. This may be important as the CHI number may not be known and the claim can then be processed. The topic

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.



The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive labels rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

The Label sheets which are a standard Avery size and perforated card sheets are available from our Consumables Department on 01254 833330.

The **Invoice Printer** should be an A4 printer.

The **Slip Printer** is used for printing customer's cheques and/or endorsing prescriptions in the PMR.

The **Report Printer** should be an A4 printer as it is used for the printing of all reports, MAR forms, picking lists and transfer advice notes.

The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

Main Office

Main Office Options

These options relate to the behaviour of Main Office.



The options include the option to reserve the stock for order that have not been picked. If this is selected then items which appear on an inbound order affect the product record by reserving it. If subsequent orders arrive for the same item and there is insufficient stock that is not reserved then an out-of-stock reply will be sent.

EDI Delivery notes can also be generated when TAs are printed by selecting the top option in the second section.

The Modem Orders section controls a number of features which are not relevant to orders which are manually input. The replies your system will generate and send to the remote systems are turned on here. The option to adjust requested order values will change the amount ordered to the maximum you can supply (your stock level of them) and create a follow on order for the rest (if the option for follow-ons is ticked). Product substitutions within the same drug family can be turned on here along with the automatic print of picking lists when the orders arrive. This is especially useful if you have printer in the warehouse for the pickers to act as soon as the orders arrive.

Paperwork

This tab of the Main Office system configuration contains the options to produce the Picking Lists (PLs) and Transfer Advice Notes (TAs) to suit your needs.



In the top area of the window there are options for how to sort the items listed on the PLs and TAs in addition to printing them with shaded lines make reading them easier, to use the short descriptions and to print a VAT analysis on the TAs.

In the bottom half there are two panes which allow the selection and arrangement of the columns on the PLs and TAs to be organised. Click on the box next to the column name to select or de-select it. Only selected columns will display in the printed version. To rearrange the order of the columns, highlight the column you wish to move by clicking on it then click the arrow buttons beneath the pane to shuffle the column up or down through the list. The columns are printed left to right in the order they are listed in from top to bottom.

Printers Tab

The final tab on the system configuration is the printers tab and is common across the whole Analyst suite of products. This configures the system for all your printers with the exception of the PMR label printer which has a separate tab in the PMR System Configuration.



The **Receipt Printer** is the small printer specifically used for the production of receipts at the PoS. These are driven directly from Analyst so you must have one of the printers in the list. Select the Printer model and the port number it is attached to (or proxy name).

The **Label Printer** is used for producing shelf edge or product labels. Some self adhesive labels rolls are available for some receipt printers which can operate in label mode. If you have one of these printers and the label rolls, select your printer model and port number. More commonly an A4 printer is used to produce self adhesive labels and shelf edge labels on perforated card. Select the printer name, which must have been added through windows and the label style. More about printing labels can be found here.

The Label sheets which are a standard Avery size and perforated card sheets are available from our Consumables Department on 01254 833330.

The **Invoice Printer** should be an A4 printer.

The **Slip Printer** is used for printing customer's cheques and/or endorsing prescriptions in the PMR.

The **Report Printer** should be an A4 printer as it is used for the printing of all reports, MAR forms, picking lists and transfer advice notes.

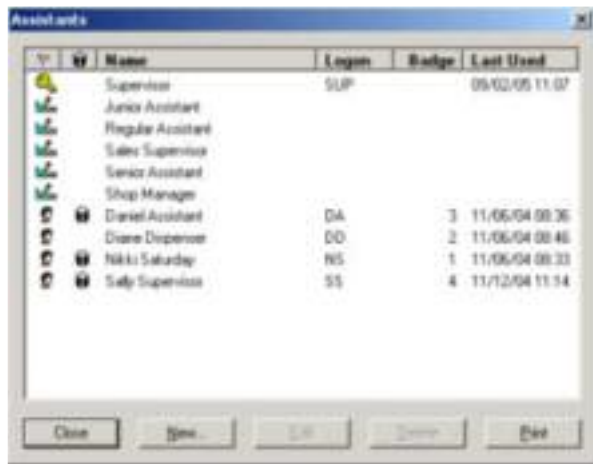
The **Statement Printer** should again be an A4 printer.

If the option **<Prompt when used>** is selected for any of the options, the Windows printing dialogue will appear for the printer to be selected when a print job is created.

System Setup

Assistant Setup

The level of security on your system can be adjusted to suit your needs and one of the most useful ways of limiting access to sensitive areas or functions is to configure assistant profiles with varying degrees of access to the system. The Assistant setup can be found from the **Setup** menu and then the **Assistants** option.



Listed are the System Supervisor, the assistant Templates and assistants already setup on your system. A padlock next to an assistant name indicates they are tracking a template. Display which assistants are linked to each template by highlighting a template in the list. The assistants which are tracking it will change to red. Conversely, highlight an assistant which is tracking a template and the associated template will display in red text.

To view, modify or add an assistant, select an assistant from the list and press **Edit**, or select **New** to create one from scratch. There are two tabs for each assistant.



The **Full name** of the assistant should be entered at the top of the details tab in the Identity section. The **Logon name** is a maximum of 3 characters so it is convention to use their initials. The **Password** can be a maximum of 16 characters and is not case sensitive. If you are using ScanBadges type the number in the **Badge number** or scan the badge whilst on this screen. The **Payroll number** is for your reference.

Enter the **RPSGB** code of the assistant if they have one. When using the ETP or Minor Ailments service the system must identify a responsible pharmacist. This is the assistant who is currently logged on if they have an RPSGB number in their profile or the earliest assistant to log on that day with an RPSGB code. A full name must be entered for any assistant with an RPSGB code.

The Privilege levels allow graded access to Payment Methods and Uncoded Sales (UCS). These are themselves granted a privilege level and if the assistant has a privilege level equal to or greater than the level specified in the payment method or UCS they are able to use it. If not they are denied access.

The Options section contains configuration settings to make the use of Analyst easier for each assistant.

The Permissions tab is used to allow access to specific features.

Assistant Options

In the options section of the assistant setup allows some personalisation of the system whilst this assistant is logged on.



Allowing a keyboard logon when globally inhibited allows this assistant to logon with their name and password when others must use their scanbadge. This is useful for area managers who may not be able to have a scanbadge for each shop they visit or as a temporary work-round for an assistant who has forgotten or lost their scanbadge.

The Enter key function allows the enter key to operate as alternative to either the **OK** button or the tab key on dialogue screens whilst the keypad layout options allows the on-screen keyboard to be either the standard QWERTY layout or alphabetically arranged for assistants less familiar with QWERTY.

First dialogue field auto-select allows the default Windows behaviour of selecting the entire contents of a field when a dialogue box appears. This is useful if you find the Full Description of products are being overwritten accidentally.

Mainly for use with the auto-log off at end of sale/session options the security section allows the requirement for a logon password to be overlooked if this assistant has been logged on within the last 10 minutes. This allows a compromise between a secure system and speed of use.

This assistant can be forced to pre-declare till-totals and be denied access to the check and view functions.

For use within Analyst PMR, this assistant can opt to have the advisory drug interactions (warnings) and adverse drug reactions (contra-indications) suppressed. Whilst the serious drug interaction messages cannot be suppressed, the password normally required to acknowledge them can be overlooked.

Using an Assistant Template

You can save time by basing the options and permissions on a template. Use the **Based on** option at the bottom of the setup screen to select a template to base this assistant's permissions on. This can either be done as a one-off or you can use the check box to track the template. This is particularly useful when managing more than one or two members of staff at the same level.



With the **Track changes** option checked any change made to the selected template will immediately affect this, and all other assistants tracking it. Most of the options in the assistant setup will be greyed out when tracking a template as changes are made from there rather than directly with the assistant profile. Any options which are not greyed out are specific to this assistant and can be changed accordingly.

Assistants that are set to track the changes of a template have a padlock displayed next to their name in the assistant list.

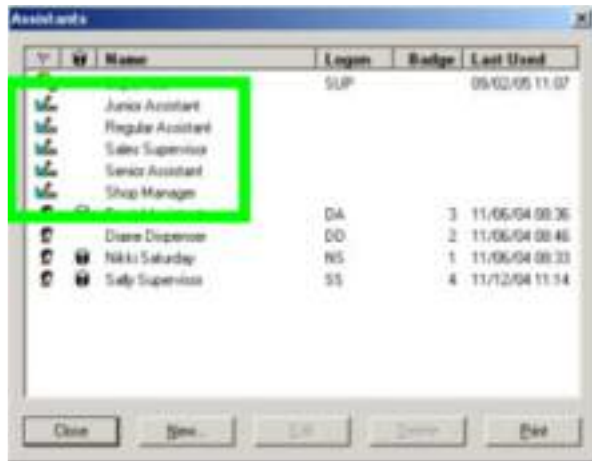
Assistant Permissions

The Permissions check boxes allow access to certain functions within the system. The full list of permissions can be viewed on the permissions page which can be printed out to help design your setup. All settings are all turned off by default, but to help speed things up there are a shortcut to copying profiles from other assistants in your system and even a few that we have created for you. By selecting an existing member of staff from the **Based on** combo box or one of the templates, a profile will be created for you.

NOTE: The standard profiles are only a guideline and are intended as a base which should be modified to your needs.

Assistant Templates

When setting up assistants on the system it is a good idea to try and specify levels of access and assign your staff to them. In the Assistant setup there are some example templates already defined.

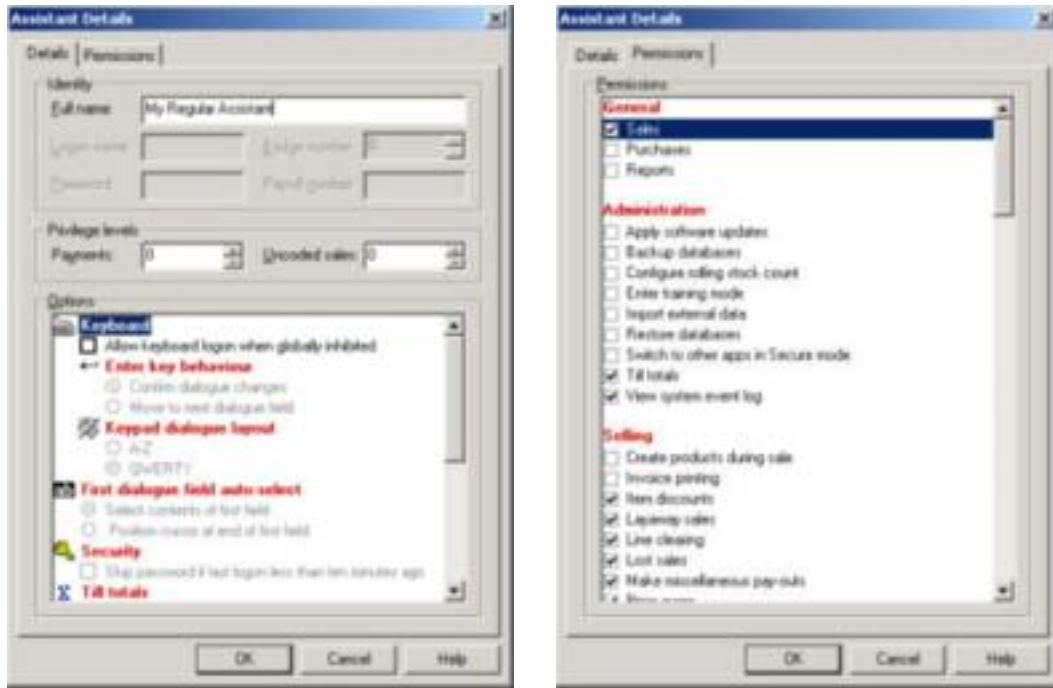


These can be used to base your assistant permissions on. They cannot be edited though. To provide yourself more flexibility copy the template you wish to use and base your assistants on that one. Any change then made to any of your own templates will affect the assistants which have their permissions based on it.

To create your own template highlight one of the standard templates in the list and click the **Copy** button at the bottom. (This is usually the **Edit** button but as you can't edit the standard templates the button changes to allow you to copy it)



A new template will appear for you to edit. Type in a title for the new template in the Full Name field.



Certain options are not available in the template. These options must be set individually in each of the assistant profiles.

Set the options you would like for this template on both tabs of the setup and click **OK**. The new template will be displayed in the list. To use the template, edit or create an assistant and use the **Based on** at the bottom.

Assistant Logon Activity

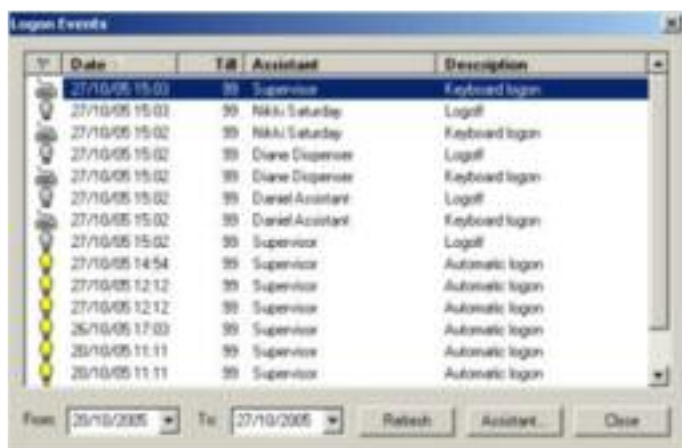
Every time an assistant logs onto Analyst it is recorded. This can be helpful when checking who was logged on at a particular time on a particular till and is required to nominate a responsible pharmacist for the ETP and Minor Ailments Schemes.

The following events are logged:

- Scanner logon
- Keyboard logon
- Automated logon at startup
- Assistant logoff
- Assistant clock-off
- Attempt to logon with invalid user name
- Attempt to logon with invalid password
- Logon abandoned at password prompt
- Keyboard logon attempted when prevented in assistant settings

The last four options are only recorded if the 'Record failed logon attempts' option is checked in the Options tab of the PoS system configuration.

All events can be viewed by selecting **Admin** from the PoS menu bar then **View Logon Events**.



T	Date	Till	Assistant	Description
	27/10/05 15:03	99	Supervisor	Keyboard logon
	27/10/05 15:03	99	Nikki Seturley	Logoff
	27/10/05 15:02	99	Nikki Seturley	Keyboard logon
	27/10/05 15:02	99	Diane Dispenser	Logoff
	27/10/05 15:02	99	Diane Dispenser	Keyboard logon
	27/10/05 15:02	99	Daniel Assistant	Logoff
	27/10/05 15:02	99	Daniel Assistant	Keyboard logon
	27/10/05 15:02	99	Supervisor	Logoff
	27/10/05 14:54	99	Supervisor	Automatic logon
	27/10/05 12:12	99	Supervisor	Automatic logon
	27/10/05 12:12	99	Supervisor	Automatic logon
	26/10/05 17:03	99	Supervisor	Automatic logon
	26/10/05 11:11	99	Supervisor	Automatic logon
	26/10/05 11:11	99	Supervisor	Automatic logon

From: 26/10/2005 To: 27/10/2005 Refresh Assistant Close

The window displays the date and time of the event, the terminal number the event took place on, the assistant concerned and the description of the event. By default the information for the last 7 days is displayed, but by using the date range selectors at the bottom left and clicking the **Refresh** button the information for any date range can be viewed.

The assistant details of the highlighted line can be viewed by clicking the **Assistant** button. Their logon history is displayed on the Logon tab. Again, use the date selectors and the **refresh** button to display the desired date range.



Time and Attendance

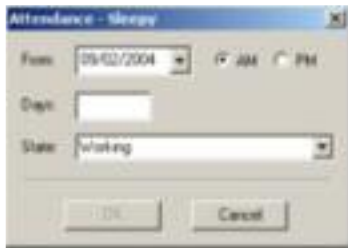
The Time and Attendance function can be used to track which staff have worked when and record holidays and sickness. This is a very basic feature though and may not be suitable if you require in-depth analysis or reports. Access this section by selecting **Setup** then **Time and Attendance**.



The assistants in the system are displayed in the left column. The middle columns represent the days of this week each split into morning and afternoon. A column on the right displays the number of days the assistant has been present for. When an assistant logs on to the system they are marked as present.

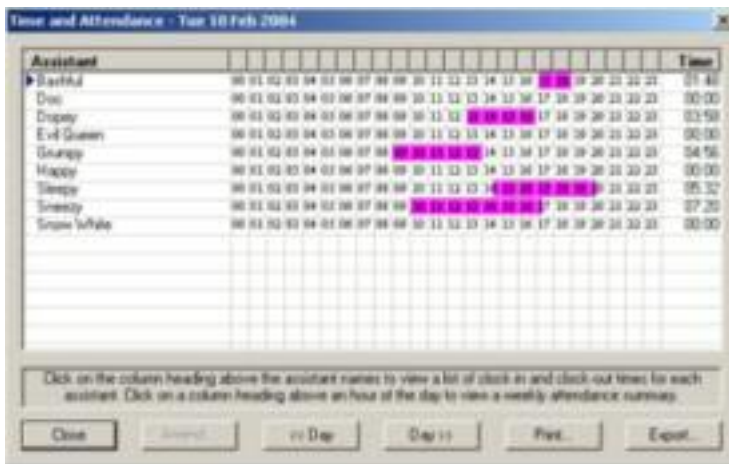
Adding an Event

Holidays and sickness can be added for assistants. Double click the assistant name in the left column or single click to highlight and click the **Amend** button.



Enter the start date, the number of days the event will last for and select the status from the combo box. Add extra statuses by selecting the **<Edit list>** option and using the status editor.

More information is available for each day by clicking on the column header for the day in question.



The day is broken down into hourly columns with a summary of the hours worked in the column on the right. To return to the weekly view click a column header above an hour.

Another view is available by clicking on the assistant column header.



To return to the initial screen click the **Chart** button on the right.

Status Editor

By selecting the **<Edit list>** option in the status combo box the status editor appears.



Type in the description of the status/event, provide a two letter abbreviation and Indicate whether payment will be received for time set to this status. In the Legend section specify the colours to be used on the charts.

Task Reminders

The Task Reminder section is found by selecting **Setup** and the **Task Reminders** options and allows notes, events and alarms on the system.



A calendar is displayed in the top left with a red ring circling today, a blue highlight on the day to set new tasks and days with tasks scheduled against them in bold. Highlight a day and click **New Task** to create a new event.



Type in the **Description** of the event, set the **Task Priority** and choose an **Action** from the combo box. The priority allows the tasks to be sorted in order of priority in the task list, whilst the action setting can be made to invoke a Head Office or PSL Data Exchange in addition to the standard pop-up message. Set any appropriate **Deadline** and **Enable alarm** if you wish a pop-up reminder to appear. If this is a regular event, the alarm can be set to **Repeat** at common intervals by selecting from the combo box. Any notes can be added in the free-type pane on the right.

When an alarm for an event appears it will stay on top of all other windows until you deal with it.



The alarm can be marked as **Done**, deferred until **Tomorrow**, turn the **Alarm Off**, **Defer All** messages or defer it until **Later** by specifying the number of minutes.

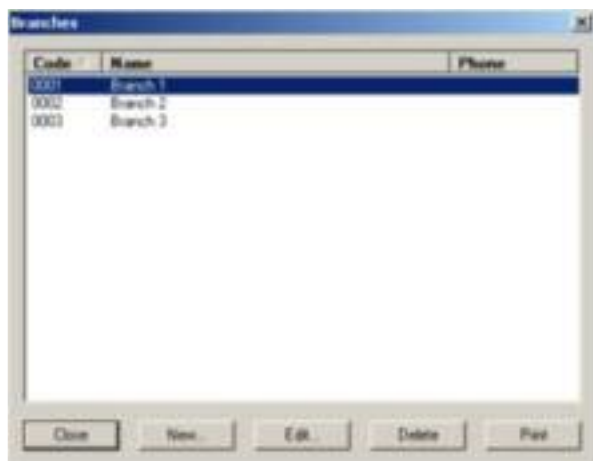
Using the Task Reminder to Invoke a Data Exchange

This option is most useful for Health Food users whose database update is released on the 1st of the month rather than on a specific day of the week. Set a new reminder called Health Food Database and select the action of PSL Data Exchange. Configure the time and date of the deadline on the 1st of the month at a time the system will not be too busy. Enable the alarm and set the repeat frequency to be monthly.



Branches

The Branches section allows the details other shops to be setup on your system. Using the Inter Branch Transfer feature stock can be transferred or even sold to other branches. The rate the other branch is charged for the goods is determined in this section. To add branches to your system select **Setup** then **Branches**.



The branches in your system are displayed in the window. To add a new branch click **New**.

The screenshot shows a "Branch Details" window with the following fields:

- Code: 0001
- Name: Branch 1
- Address: High Street, Anytown
- Post code: [empty]
- Telephone: 01234 567894
- Fax: [empty]
- Contact: Paul
- Email: [empty]
- Price: Cost ex VAT
- Discount: 10.00%
- Balance: 0.00
- Credit limit: 1000.00
- Notes: Cash on delivery

Buttons for "OK" and "Cancel" are at the bottom.

Create a four digit Account **Code** for the branch and type in their **Name** and **Address** details. The rest of the contact details are optional. Set the **Price** this branch is to be charged from the combo box from the choice of Retail, Cost+VAT, Cost ex. VAT and Free. A **Discount** can be applied to the price rate, or if the rate is prefixed with a "-" (minus) this becomes a surcharge.

The **Balance** of the branches account and their **Credit limit** are specified above the **Notes** box where any extra information can be typed.

Licensee Details

These are the details of the outlet the system is installed in and are primarily used to head receipts, invoices and account statements.

To enter or check the details they can be accessed by selecting **Setup** from the menu bar then **Licensee Details**.

The **Reference** field is used to brand any printouts and is particularly useful if you are part of a group. Enter your shop reference number here.

Scottish pharmacies should enter their **Site code** in the final field on this page. This is used to identify the pharmacy in Minor Ailments service transactions.

VAT Rates

The VAT Rates are common through the system and are setup on install and as part of the OTC database update. These are used to calculate the VAT payable during each sale and on reports along with profit calculations and on 'margin' price maintained products. They are accessible from the **Setup** menu and the **VAT Rates** option.

Description	Rate
Exempt	0.00%
Low	5.00%
Standard	17.50%
Zero-Rated	0.00%

The four standard options of Standard, Low, Zero and Exempt should not be deleted or amended, unless the Chancellor changes the rates, but additional rates can be added for any other strange rates you may encounter.

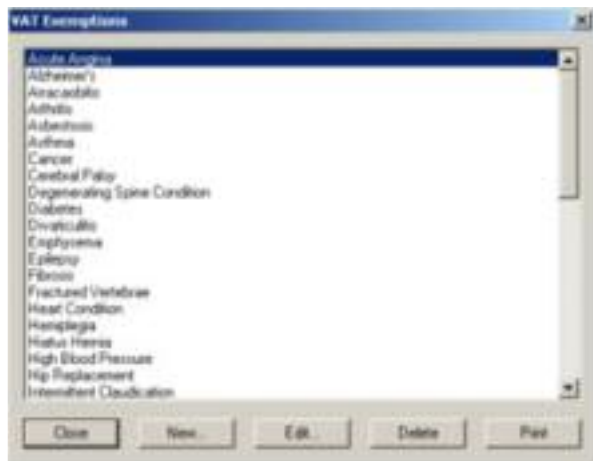
Click the **New** button and type in the description of the new rate and enter the percentage rate. The Ledger Ref field can be left blank.

VAT Exemptions

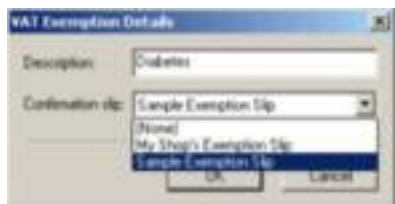
The VAT Exemption feature allows people with certain certified medical conditions to be exempt from paying VAT on certain products which relate to their condition.

Condition Setup

Initially the conditions must be setup. A number of typical conditions are already setup and can be found by selecting **Setup** and **VAT Exemptions**. The list of exemptions is then displayed.



Setup new conditions by clicking the **New** button or change the details of an existing condition by clicking the **Edit** button.



To satisfy the VAT man the system can print a confirmation slip for the customer to sign. This provides sufficient evidence that they were not required to pay VAT. A standard slip can be created for your shop by calling the CareDesk and once configured it will appear in the confirmation slip box. The sample slip will always be there for you to experiment with. If you require a confirmation slip for customers with certain conditions you must select the slip for each of the conditions. If you do not require a confirmation slip leave the selection as "(None)".

Product Setup

Sufferers of these conditions are not exempt from paying VAT on all purchases so each product which is likely to be bought by a VAT exempt customer must be identified. On the Selling Tab of the product check the **Exemptible** option at the bottom right.

Product Details (28064)

Details | Selling | Buying | Disp | User | Dispensed | Forms | Transactions | Purchases | Prices

Full description: One Touch II Blood Glucose Monitoring System Message: (None)

Max discount: 100.00% Min retail: 0.00 Facing: 0 Restriction: (None)

Code	Retail	Pack Size	Location	Created	Used	Sales
E0892824	57.57		(N/A)	22/03/00		0
LLF32N	57.57		(N/A)	11/11/99		0
P0892824	57.57		(N/A)	11/11/99		0

Buttons: Add, Edit, Delete, Lock, Labels, Exemptible, Blank CDU

Buttons: Copy, Paste, New, Delete, Navigation, OK, Cancel, Help

Customer Setup

Each customer who is eligible to be exempt from VAT on certain items but be identified as suffering from a condition setup above. In the customer setup, select the condition they suffer from in the **VAT Exempt** field.

Customer Details (881)

Details | Activity | AutoDebits

Surname: Acque Account: Credit limit: 0.00 Balance: 0.00

Forename: Tina Export ID: Group: Require order number Dispensed product

Address: 83 Cerge Avenue

Pricing: Source: Retail Discount: 100%

Post code: CV15 9LL Card ID: 071 Loyalty: Scheme: (None) Points: Free gift

Telephone: Message: (None)

Fax: History: Created: 28.05.00

Email: Last statement: Total amount spent: 0.00

Company: Total points earned: 0

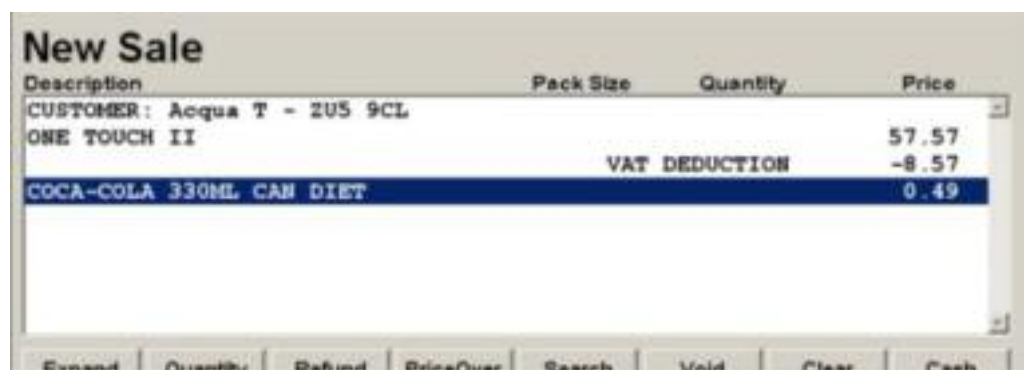
VAT exempt: Diabetes

To display the patient details, hold down the Ctrl key whilst invoking this dialogue

Buttons: Copy, OK, Cancel, Help

Selling Exempt Items

Analyst will automatically deduct the VAT of any items which are marked as exemptible sold to customers marked as exempt. So if all the steps above have been setup, identify the customer during the sale and scan or enter all of their items and Analyst will do the rest.



If the condition the customer suffers from is flagged to print a confirmation slip it will be printed on the receipt printer at the end of the sale.

Currencies

Analyst is a fully multi-currency system and will comfortably manage any currency changeover as proven with the Irish change over to the Euro in January 2002. Any number of currencies can be added with one designated as the base currency in which the system stores all figures. Select **Setup** then **Currencies** to view the currencies setup on your system.



The currencies are listed in the main window. By default the system is setup with only Pounds Sterling. The currency with the red flag next to it is the "Base Currency". This is the default currency new sales will be made in, and all prices in the system including orders and reports are displayed in this currency. The "Legacy Currency" is the former base currency. This is used for reference following a currency changeover.

To add a new currency click the **New** button.

The 'Currency Details' dialog box includes the following fields and options:

- Description: Japanese Yen
- ISO code: JPY
- Always give change in this currency:
- Currency previously used in legacy transactions:
- Show legacy currency conversion rate on receipt:
- Presentation:
 - Currency symbol: ¥
 - Cheque wording: EN
 - Decimal places: 2
 - Decimal values: 100
- Conversion rates:
 - From default: 105.43094
 - To default: 0.00117

Type in the **Description** and the standard international code for the currency. If the **ISO code** is not in the list, type it in.

If this is the base currency check the box to **Always give change in this currency**.

If this is the old base currency following a currency changeover mark this as the **Currency previously used in legacy transactions**. This marks the correct currency as legacy if more than two are setup.

The **Show legacy currency conversion rate on receipt** prints the total value of the sale in the legacy currency which helps customers and staff equate the new currency with the legacy one.

Select the **Currency symbol** from the list or add it if necessary. Type in the **Cheque wording** which is the common name for the currency.

NOTE: Your receipt printer may not be capable of printing all characters.

Enter the Conversion rate in the section at the bottom of the window. Only one of the fields need be filled as they are calculated from each other. Use the **From Default** to indicate how much of this currency one base unit of currency will buy, or the **To Default** to indicate how much base currency one of this currency will buy. If exchange rate between this currency and the base currency changes it is your responsibility to keep this conversion rate up-to-date.

Accepting Different Currencies

Now you system is configured to accept more than one currency a new button will appear on the End Sale screen. This toggles between all available currencies in the system and is converted on-screen as each currency is selected.

The End Sale screen displays the following information and options:

- Stock: [] Cost price: [] Promo: 0.00 Amt due: £4.15
- On-order: [] Margin: [] VAT: 0.62 Sale items: 1
- Payment methods: Cash, Cheque, Card, **Euro** (highlighted), Other
- Additional options: Discount, Void, Layaway, Account, Points, Cancel

Part payment can be accepted in any or all currencies for any sale.

If you are subject to a base currency conversion an additional utility has been written so easily change the system from one currency to another. Click here to find out more.

Time Zone Pricing

This feature allow the prices of good to change for certain periods of time. These can be used to create "Happy Hours" where your prices fall or "Sad Hours" where they rise.

Select **Setup** and then **Time Zone Pricing** to view the time zone section.



Each day is broken down into hours. Select the day on the left of the window and check the boxes on the pane on the right to specify the range of time to use the time zone prices. The **All Times** and **No Times** buttons can be used to check or clear all of the time zones quickly. With the first day complete select the next day and repeat. If the second day is largely the same as the first the **Copy** button will invite you to replicate the time zones from the last day that was edited.

For the prices to change, each product must have a **Time Zone Price** which is set on the Promo Tab of the Product Editor.



The **ESEL Label Address** relates to an Electronic Shelf Edge Label feature which is now obsolete.

At the specified time(s), the system will charge the price in this field and at the end of the time zone will revert back to the retail price held on the details tab.

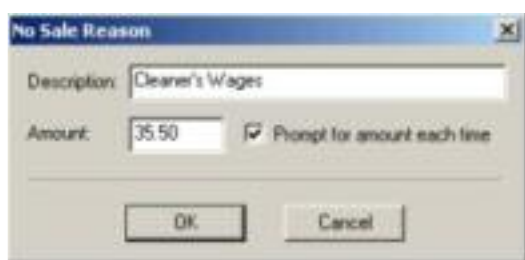
NOTE: When using this feature be sure to update the prices displayed to the customer with the prices.

No Sale Reasons

Rather than simply issuing cash from the drawer as a 'No Sale', Analyst provides the facility for cash removed from the drawer to be recorded against a reason. This list of reasons can be modified to fit your needs by selecting **Setup** and **No Sale Reasons** from the menu.



A number of typical options are setup on the system at the time of install. These include tea, coffee, milk, window cleaner etc and are all examples of how cash is used from the drawer to pay these everyday expenses. To add new options click the **New** button.



Type in the **Description** which is to be used on screen, receipts and Till Totals. The **Amount** can be entered either as guidance or if it is a constant amount. The **Prompt for amount each time** box enabled the reason to be defined as constant or changeable.

Creating No Sale Reasons 'On The Fly'

When using the No Sale option from the Previous Sales screen an option is displayed to create a **New** reason. This only allows the entry of a description and not an amount. Complete the setup of this reason as soon as possible by editing it through the **Setup** and **No Sale Reasons** options, then select **Edit**.

Using No Sale Reasons

From the Previous Sales screen, press the **No Sale** button. The list of No Sale Reasons is displayed along with the Account options, Bankings, Open Drawer, Till Totals and Drug Interaction Checking (if using Analyst IPS). Select the reason required and press **OK**. depending on whether it has been set to prompt for an amount each time or not, you may be required to type in the amount to remove from the drawer and press **OK** before the drawer opens.

Payment Methods

Cash, Cheque and Card are standard payment methods and cannot be removed from Analyst. Additional ones can, however, be added. Coupons and vouchers are commonly presented over the counter, but they must be setup in the system to be accepted correctly.

These are added by selecting **Setup** and **Payment Methods** from the menu.



All additional payment methods are displayed in this window. To add to the list click the **New** button.



Type in the **Button Text** (max 10 characters) and the **Description** of the method (max 20 characters). The button text, as expected, will appear on the button relating to this payment method whilst the description will on the customer's receipt and on the till totals.

The **User Key** fields is only available if you are a user of a programmable keyboard. One of the definable user keys can be specified as this payment method. The **Privilege level** provides security for this method and only allows assistants with a privilege level equal or greater than this number to use it.

This payment method is optionally **Refundable**. This is not appropriate for all methods such as manufacturer's vouchers, but some forms of payment can be re-issued to the customer. Credit notes, for example.

Using Additional Payment Methods

When additional payment methods have been defined after the **End Sale** button has been pressed to finalise the sale the **Other** button will be available to select as well as the **Cash**, **Cheque** and **Card** buttons. Press the **Other** button to reveal the additional payment methods you have defined.

Uncoded Buttons

Uncoded buttons allow goods to be sold through the system without scanning them. There is a search facility which allows the item to be identified by description, a PLU (Product Look Up) function to type in the barcode or PLU number in case the barcode has been damaged and others which will be explained later in this topic.

Although with an EPoS system everything should be tracked in and out of the shop through the system, sometimes it just isn't practical. Items such as prescriptions, Development and Printing charges and low value-high volume lines as such examples. Uncoded buttons provide the facility to sell these items without i

NOTE: No stock level, cost or profit information is available for items when using uncoded buttons. If you need this level of detail you will need to use Stock Dumps or create the product on the system in the Product Editor.

Select **Setup** and **Uncoded Buttons** to view the buttons already setup.



Button	Type	Description	Dept/Disp
Search	Search		
Private	PLV	PRIVATE SCRIPT	
NHS	Paid	NHS SCRIPT	
Exempt	Custom	EXEMPT SCRIPT	
Dept.	Dept		
D & P	Custom	D & P	Developing ...
Surveys	Custom	SURVAYS	Balance

Click on the **New** button to add a new uncoded button. You may need to remove unused buttons as a maximum of 11 buttons can be defined.



Button Details

Sale type: Custom

Button text: []

Order type: []

Package level: 0

Description: []

Price: 0.00

Max discount: 100.00%

VAT rate: (Prompt)

Loyalty scheme exclusions:

- Gold Card
- Platinum Card

Department: (None)

OK Cancel

Select the type of uncoded button this is to be from the combo box in the top left.

Search	Search for the product by description
Location	Log the sale against a specific location in the store
Department	Log the sale against a specific department in the system
Custom	Define your own uncoded button
Loose	This displays a list of all loose items in the system
PLU	Allows entry of a PLU or barcode number
Script - Paid	For use with Analyst IPS - an NHS prescription charge
Script - Private	For use with Analyst IPS - a private prescription
Script - Exempt	For use with Analyst IPS - an NHS prescription exempt from charges
Script - Pill	For use with Analyst IPS - an NHS prescription for the contraceptive pill
Script - No Charge	For use with Analyst IPS - an NHS prescription which does not attract a charge
Stock Dump	Log the sale against a stock dump

The **Button text** will appear on button in the uncoded section of sales whilst the **Description** defined further down appears in the sale detail, on the customer's receipt, on Till Totals and in reports.

The **User Key** is for users of a programmable keyboard and allows a 'hot key' to be defined for this uncoded item. The **Privilege level** allows the use of this button to be restricted to particular assistants as defined in the assistant setup.

If the **Price** of the item is always the same it can be defined here to save time entering it during the sale. If the price should be entered every time the button is used the price field should be left blank with no number in at all. A discount limit can be specified in the **Max Discount** field and if the VAT rate of the item(s) is known and constant it should be entered here, again to save time during the sale.

Items sold through this button can be made excluded from loyalty schemes by checking the boxes of the schemes in the **Loyalty scheme exclusions** pane. The **Code Prefix** field is for use with the PLU option and allows the system to automatically prefix the PLU number entered with a letter or code. This allows PLUs to be defined with their own prefix e.g. 'PLU' or 'Z' which will allow them to be found in the system more easily when reporting.

The **Department** field allows the sales figures of this button to be tracked through the system. A department from the system should be selected. If one is not specified the sales made on this uncoded button will appear only on the Till Totals and not in the system reports. The field becomes a **Stock Dump** option when the Stock Dump option is selected from the Sale Type list in which case the appropriate stock sump should be selected to account for the sales made with this button.

Speed Sale Buttons

The eight Speed Sale buttons on a system are displayed in the centre of the New Sale screen. The functions of the buttons are definable by you and represent your most frequently used functions and uncoded buttons. By using these buttons effectively the sales process is sped up considerably. Not only are the eight buttons unique to your shop, but they can be different on each terminal in your shop.



To configure the Speed Sale Buttons select the **Setup** menu then the **Speed Sale Buttons** option.



The window displayed on the left above is split into two halves. The top section contains the **Global Settings** which define the eight buttons across the entire system. Select the functions of the buttons from the options in the combo box which are displayed on the right above. The options are listed alphabetically with the Action options, End Sale options (payment methods) and Uncoded options. Note that additional payment methods and Uncoded options which you have defined appear in the list.

If you require different options on different terminals around the system, each terminal can deviate from the global settings by selecting some **Local Settings**. When set to "(Default)" the terminal will adopt the global speed sale buttons, but any which are changed over-ride the global setting for that button.

Each of the buttons can be accessed quickly by using the F5 to F12 buttons across the top of a normal keyboard as well as on the touch screen. To make this easier the button on-screen can be embossed with the appropriate key to strike by selecting the **Display function key hints on Speed Sale buttons** option.

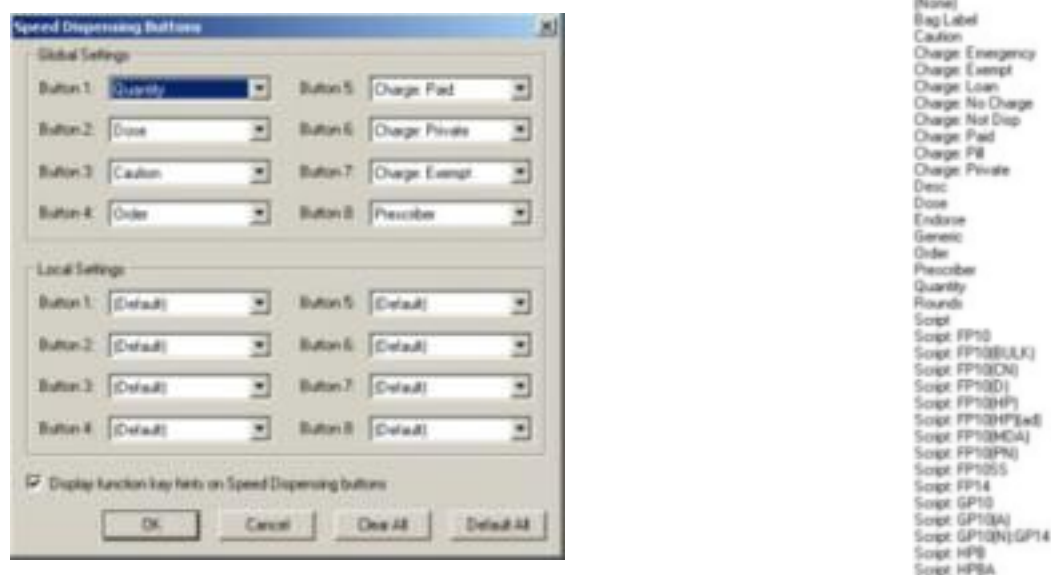
The **Clear All** button at the bottom of the window resets both the global and local settings back to "(None)" and "(Default)" respectively whilst the **Default All** button resets the local settings to the "(Default)" only.

Speed Dispensing Buttons

The eight Speed Dispensing buttons on a system are displayed in the centre of the Dispensing screen. The functions of the buttons are definable by you and represent your most frequently used functions. By using these buttons effectively the dispensing process is sped up considerably. Not only are the eight buttons unique to your shop, but they can be different on each terminal in the dispensary.



To configure the Speed Sale Buttons select the **Setup** menu then the **Speed Sale Buttons** option.



The window displayed on the left above is split into two halves. The top section contains the **Global Settings** which define the eight PMR buttons across the entire system. Select the functions of the buttons from the options in the combo box which are displayed on the right above. The options are listed alphabetically with commonly used functions, charges and script types.

If you require different options on different terminals around the system, each terminal can deviate from the global settings by selecting some **Local Settings**. When set to "(Default)" the terminal will adopt the global speed sale buttons, but any which are changed over-ride the global setting for that button.

Each of the buttons can be accessed quickly by using the F5 to F12 buttons across the top of a normal keyboard as well as on the touch screen. To make this easier the button on-screen can be embossed with the appropriate key to strike by selecting the **Display function key hints on Speed Sale buttons** option.

Calculator

In the event that you need a calculator, but don't have one at hand, simply click on the **Calc** button in the title bar at the top of the screen to launch the Windows Calculator.



The button can be removed from the title bar in the Miscellaneous section on Options tab of the PoS System Configuration.

Index

A		
AAH.....	24	
Account Code.....	92	
Addresses tab	51, 71	
Alarm Off	90	
Alerts Tab	48, 70	
Allow Zero.....	2	
Anywhere.....	5	
Assistant Options.....	83	
Assistant Setup.....	81	
Assistant Templates.....	85	
Attendance.....	88	
Avery	57, 77, 80	
B		
Badge	81	
Batch Number	15	
Blank CDU.....	3	
BNF.....	7	
Branches	92	
Brewhurst.....	24	
Bulk Supplier	5	
C		
C&D.....	50	
Calculator	105	
Card.....	100	
Cash.....	100	
Cashback.....	46	
Caution Text	7	
Chart button	88	
Cheque	100	
Class Titles.....	26	
Classes Tab	14	
Clear All button	103	
Colour	8	
Container Qty	7	
Create New Products.....	50	
Credit.....	92	
Currencies.....	96	
Customer Display Unit.....	3	
D		
Daily Supplier	5	
Decimal.....	2	
Default All button	103	
Defaults Tab	49	
Defer All	90	
Department.....	2, 19, 101	
Department Margin.....	2	
Details Tab	2	
DFU	7, 50	
Discontinued.....	5	
Dispensed Tab	9	
Done.....	90	
Drug Families	7	
Drug File Update	50	
Drug Group	7	
Drug Pack Size	7	
Drug Tab	7	
E		
Endorse	69	
Equalisation	8	
ETP Gateway	74	
ETP Manager	74	
Euro	96	
Exchange Tab	47	
Exempt Items	94	
Exemptible.....	3, 94	
Expiry Dates.....	15	
External Price Updates.....	50	
F		
Family Substitute	8	
Fees	7	
Force Prices	50	
Force Supplier	50	
Form	7	
Free	2	
G		
Gateway	74	
Global Settings.....	103, 104	
Group Margin	2	
H		
Handling Fee	67	
Hardware Tab	56	
Hit Code	8	
Hold-off.....	5	
HSP.....	24	
I		
IMS	54	
Invalid password.....	87	
IP 55		
IP Ordering	24	
ISP.....	47	
L		
Label Printer.....	57, 77, 80	
Label Tab	68	
Label Text.....	8	
Last Purchase.....	2	
Later	90	
Legal Categories.....	7	
Licensee Details	93	
Local Settings.....	103, 104	
Locations	29	
Logon	87	
Loose.....	3	
Loudspeaker button	48, 70	

M	
Main Office	78
Manufacturers	2, 21
Margin	19, 20, 68
Markup	2, 19, 20
Mawdsleys	24
Maximum Discount	3
Merge Tab	17
Minimum Fee	67
Minimum Retail	3
Miscellaneous Tab	53
Model Tab	15
Mute	48, 70
N	
Network Tab	55
New Task	90
No Sale	99
NTX File	55
O	
On Order	2
Open Drawer	99
Options Tab	35
Order Code	5
Order Multiple	5
P	
Pack Size	5
Padlock	81
Parent	17
Paste Tab	18
Payment Methods	100
Permissions	84
Pharmacy Stamp	69
Physical Attributes	8
Picking List	79
Play	48, 70
Play Sound	30
PLs	79
PMR Miscellaneous Tab	73
Postcode Lookup	51, 71
Postcodes	51, 71
Pounds Sterling	96
Pre-printed	68
Prices Tab	13
Private Script Charges	67
Product Substitute	8, 27
Promo Stock	10
Promo Tab	10
PSL Source	2
Purchase Aggregate	2
Purchases Tab	12
Q	
QWERTY	83
R	
Receipt Printer	57, 77, 80
Report Printer	57, 77, 80
S	
Sale Restrictions	31
Sales Tab	46
Scanbadge	83
ScanBadges	81
Selling Code	3
Send Data	47
Serial Number	15
Shape	8
Short Codes	51, 71
Single Price	5
Slip Printer	57, 77, 80
Source	2
Speak	48, 70
Speak Message	30
Specifics Tab	15
Speed Dispensing Buttons	104
Speed Sale Buttons	103
SSP	5
Stability	7
Statement Printer	57, 77, 80
Stock	2
Stock Dump	32
Stock Dump Topup	32
Stock Units	2
Sub-pack	7
Suppliers	22
Suspended	5
T	
TAs	79
Task Priority	90
Task Reminders	90
Template	85
Till Closed	46
Till Description	2
Time Zone	98
Tomorrow	90
Transactions Tab	11
Transfer Advice Note	79
Transient PriceOver	35
TRN Mirror	55
U	
UCS	81
Uncoded	101
Uncoded Sales	81
Unichem	24
Unit Price	5
Updates Tab	50
User Classes	26
User Maintained	2
User Margin	2
User Tab	8
V	
VAT	2, 93
VAT Exemptions	94

W

Warranty Slip 15
WAV file.....30, 48, 70
Web Price 16

Web Tab.....16
Web Waffle.....16
Z
Zero.....2