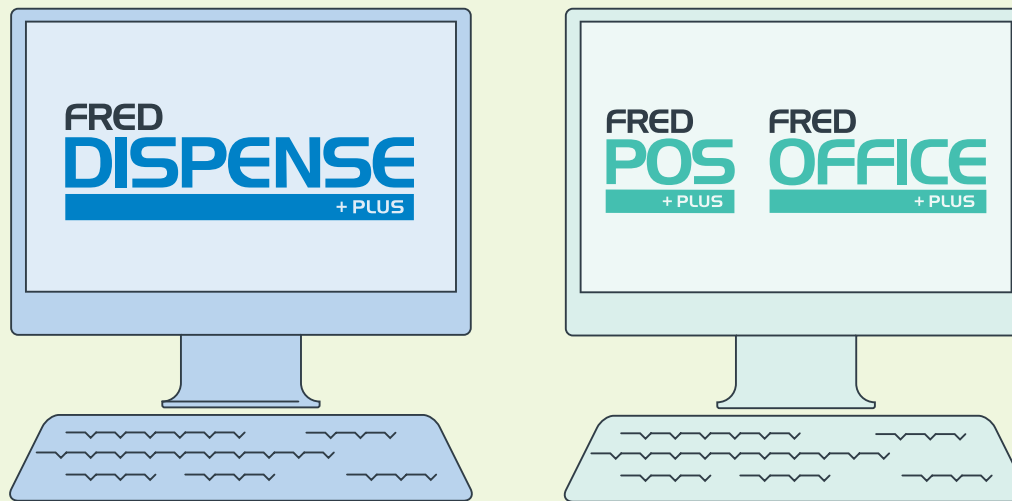


YOUR ONBOARDING PROCESS

Dispense and POS data conversion



If you have any **questions regarding your upcoming installation**, please contact your Fred Onboarding Team (Fred Business Development Consultation, Trainer or Technician) or reply to your communication ticket in Customer Help Portal.

YOUR ONBOARDING PROCESS

Dispense & POS data conversion

1 Schedule Resources and confirm installation date

Once you have confirmed that you are ready to proceed, the Fred Team will schedule your installation (usually a four-week lead time).

- You will be sent a confirmation email.

You will need to complete the following:

- Update Pharmacy Details Form (Should have been received through Fred BDM)
- Complete Onboarding Questionnaires and complete prior learning tasks (Webinars etc)
- Discuss timeframes, expectations and have a clear understanding of what will occur and also what will be required from your team
- eRx and MedView Flow Pro registration
- Sensitive Data Access request form for all Third-Party Integrations
- You (the Store) will need to contact all third-party software integration vendors to notify them of change

Fred Trainer will contact you and provide:

- Learning Pathways and training webinars for staff to complete
- Conversion Quick Reference guides/ What Data is Converted from your existing software



2 Test Conversion (if applicable)

Once your installation date has been confirmed and your completed questionnaires are returned.

Fred Technician will:

- Collect data for test conversion

Fred Trainer will:

- Review test conversion
- Contact you and discuss results

You (the Store) will need to:

- Prepare your staff for your Software Change
- Ensure staff have allocated time to complete Online Learning Pathways and Training Webinars
- Provide Supplier account details required for Gateway Ordering (Online ordering/Invoicing)
- Order Stationery (Shelf tickets, Dispense labels etc)

3 One-Week Prior to Live Day

Fred Trainer will contact you to:

- Discuss Training Plan and expectations
- Discuss conversion night tasks and send email summary
- Confirm staff have completed Learning Webinars
- Answer any questions that you may have regarding your Installation
- Discuss store promotions requirements for live day

You (the Store) will need to:

- Inform staff you are changing software
- Prepare your team, share the training plan with relevant staff
- Ensure staff have completed Online Learning Pathways and Training Webinars



4 Conversion Evening

Your Fred Technician will arrive onsite to commence your conversion and configuration.

Prior to the conversion you (the store) will need to:

- Complete your end of day POS procedure
- Close your claim at close of business
- Confirm you have your NASH certificate and PIC details available
- Access PRODA to activate a B2B device for PBS Online
- Age and print customer account statements
- Print any reports that you require from your existing software
- Print Uncollected Scripts Report

A staff member from your store will be required to remain onsite during the conversion. This time may vary and should be discussed with the Fred Technician for an estimate.

Fred Dispense Plus Online Help

webhelp.fred.com.au/dispense/plus.htm

[Learning Pathways](#) | [Keyboard shortcuts](#)

5 Live Day

Your Fred Technician and Trainer will be onsite at the arranged time prior to the store opening

Fred Trainer will:

- Configure POS, Fred Office and Fred Dispense Plus per installation questionnaires requirements
- Complete final checks to ensure Fred Dispense Plus, ePrescriptions, Fred Office and POS are working as expected.
- Provide Staff Training to your nominated key staff

Fred Technician will:

- Support with any technical issues that may occur
- Assist Third Party vendors with logging in to configure their software



6 Post Install

- Follow data management procedures to support inventory accuracy.
- Leverage available resources to support ongoing onboarding and training of new and current staff..

You (the store) will need to:

- Complete a *Post Installation Survey* emailed to your primary store email address
- Keep up to date with new features, improvements and news with the *What's New* prompt and *Release Notes* pages on Fred WebHelp



For post installation technical support please log a ticket via your Fred Help Portal or call **1300 731 888**

Fred Office/POS Plus Online Help

webhelp.fred.com.au/fredoffice/home.htm

[Learning Pathways](#) | [Till shortcut tips](#)