

FRED OFFICE VERSION 3.4
August 2012

FRED.OFFICE USER MANUAL



MANAGING IMPORTED ITEMS FROM THE CONSIG MACHINE IN FRED OFFICE

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FRED

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SECTION 1

GETTING STARTED

This user manual is a guide for pharmacists and operators to configure Fred Office to work with a CONSYS machine. The processes indicated in this manual outline the methods in which Fred Office can utilise the minimum and maximum stock holdings to assist you in maximising your ordering capabilities appropriately. You will learn how you can separate and distinguish items stored in the CONSYS machine from other stock in Fred Office to enable you to increase ordering efficiency; maximise the space available in the CONSYS machine, and manage stock stored within the CONSYS machine.

In this section:

- Introduction 1
- Document conventions..... 2
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INTRODUCTION

Using this manual

This manual has been written for use by people who:

- are familiar with common Australian pharmacy terminology
- are familiar with basic computer concepts
- use Fred Office on a frequent basis in a pharmacy and;
- are familiar with the Fred Office software;
- know how to create a Draft and use the Draft Wizard, use Quick Action, and send Orders
- are familiar with AppCat and know how to perform AppCat matching;
- know how to perform updates for AppCat

This manual can be downloaded in PDF format from the Fred Help Centre (see '*Fred Help Centre (Online)*' page 3).

DOCUMENT CONVENTIONS

Throughout Fred user guides and manuals, different style conventions are used to help identify reading material and user interface elements.

Terms may be emphasised by the use of italics or bold; user interface elements such as **File** menu paths are in bold, with some procedures containing a (>) symbol to separate entries (e.g. go to **File > Save As**); text you are asked to type or command buttons to select are shown in bold (e.g., select **[Add Member]**), and dialog box, windows and button names are shown in bold (e.g. **Add New Member** screen appears).

Symbols and icons in this document

Fred manuals use a consistent style to present information. You may find the following referrals, notes, or warning messages throughout this document:



SEE: Useful information that may assist you.



TIP: Refer to a specific section in the document or externally for more information.



WARNING! Failure to take or avoid a specific action may result in physical harm to you, the hardware, or the software.

FINDING HELP

You can get help on any of our products from the Fred Help Centre or by contacting our friendly support team who will be able to assist you.

Fred Help Centre (Online)

To get help on Fred products, visit the Fred Help Centre. Here, you can download documents, tutorials as well as browse news and forums about Fred products.

Go to <https://help.fred.com.au> to sign up to the Fred Help Centre. Once you have signed up you will be able to access useful resources with links to:

- information about new and future product features, manuals and documents, and product newsletters.
- forums and blogs allowing you to discuss technology and products, provide feedback and input into Fred technologies.
- social networking tools that allow you to have conversations with closed groups such as friends or sister stores.
- upcoming Webinar information and previously recorded Webinars you may have missed, and short movie tutorials about Fred Health products.
- wiki-style knowledgebase information pages which make it easy to find the information you are looking for.
- RSS feeds and alerts on new blog activity and additions to the site.

Integrated F1 Online Help

To assist you in using Fred Office, online help is available.

To access Fred Office online help:

- ▶ While in Fred Office, press the **[F1]** key.

Contacting Fred Help

Fred IT Group provides full support for the entire range of Fred of products. Questions concerning technical issues, how products work, and the use of the software are handled by our Fred Help team.

- Fred Help
Phone: 1300 731 888
Email: help@fred.com.au
8.30am - 9.00pm (EST) Mon – Fri
8.30am - 5.00pm (EST) Sat, Sun & Public Holidays
- Website
www.fred.com.au
- Fred Help Centre
<https://help.fred.com.au>

When contacting Fred Help, Fred Help Consultants need to ask a variety of questions to determine the best way to proceed with your call. It may help to be aware of the sorts of questions you will be asked when calling with a Fred query or problem.

When contacting support, be prepared to provide the following information:

- The Fred software program(s) you are calling about (i.e. Fred Dispense, Fred Office and Fred Connect etc.)
- Specific details about what you or are trying to do.
- The error message you receive (if any).
- Step-by-step of your actions when the problem occurred.
- If the problem occurring is on one computer or on all computers.
- How long the problem has been occurring.
- Other aspects you are aware of that may have contributed to the problem. For example:
- If new hardware or another software program has been installed since the issue first occurred.
- The severity of the issue — if you are still able to dispense or sell at your Till or not.

Willach Customer Support

For assistance with the CONSYS data extraction process, contact Willach Customer Support on 1800 WILLACH or 1800 94 55 224.

SECTION 2

MANAGE ITEMS FROM CON SIS IN FRED OFFICE

Import the provided spreadsheet file from CON SIS into Fred Office, which can then be used to define and manage imported items independently from the remainder of the dispensary lines.



TIP: Before you begin it is highly recommended that *AppCat matching* and *AppCat changes* are up to date to assist with the matching process.

In this section:

- Step 1: Create new worksheet and import CON SIS spreadsheet using Item Manager..... 5
- Step 2: Add matched items to a Group 18
- Step 3: Create a new location called 'CON SIS' using quick action 19
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Step 1. CREATE NEW WORKSHEET AND IMPORT CON SIS SPREADSHEET USING ITEM MANAGER

Import the CON SIS spreadsheet in Fred Office to update the ordering details — enabling you to order these items efficiently and maximise the space available in the CON SIS machine.

To complete *step 1* of this document, perform the following steps below:

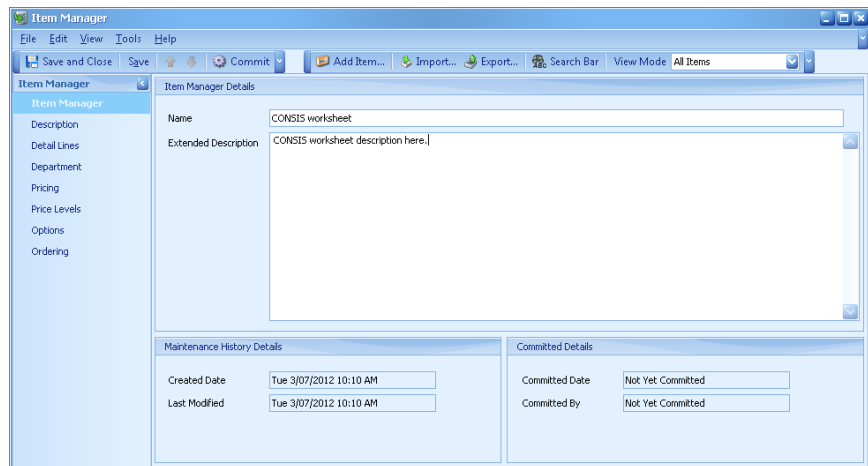
1. Create new worksheet
2. Import spreadsheet using Import Wizard
3. Map columns on the worksheet
4. Match column headings manually
5. Select data columns to import
6. Specify the matching method to use
7. Search for unmatched items in AppCAT
8. Preview and confirm matched results
9. Save your template
10. Update imported items

1 Create new worksheet

Create a new worksheet which you will use to manage CONSYS items.

To create a new worksheet and import the CONSYS file in Item Manager:

1. From the Fred Office screen, click the **Assistants** tab on the bottom-left side of the screen.
2. On the top-left of the screen under **Assistants**, click **Item Manager**, and then click **[New]**.
The *Item Manager Details* screen appears.
3. In the **Name** field, enter a name.
4. In the **Extended Description** field, enter a description.



2 Import spreadsheet using Import Wizard

Use the *Import Wizard* to import the CONSYS item spreadsheet. The *Import Wizard* program in Fred Office runs in self-explanatory dialog mode. Every window contains a certain selection of buttons to control the installation process.

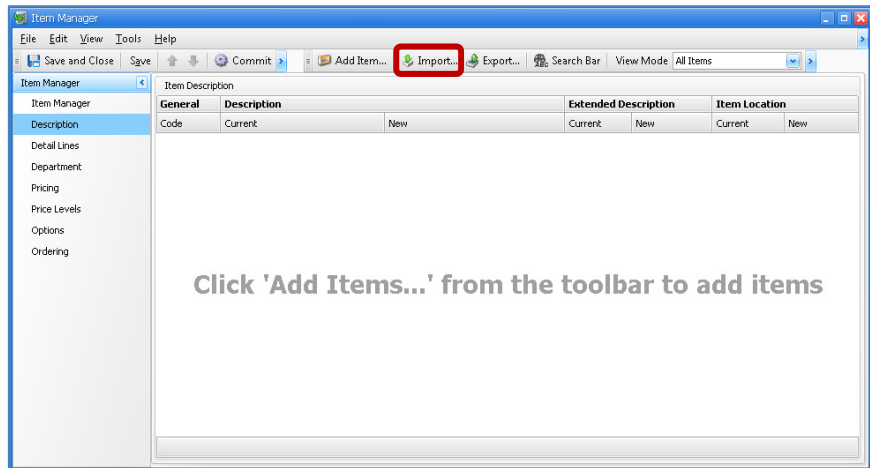
The most important buttons are assigned the following functions:

- **[OK]:** Confirm action.
- **[Cancel]:** Cancel action.
- **[Next]:** Go to next step.
- **[Back]:** Go to previous step.

Before you import the file, the instructions below assume you have your spreadsheet ready to be imported.

To begin importing the spreadsheet:

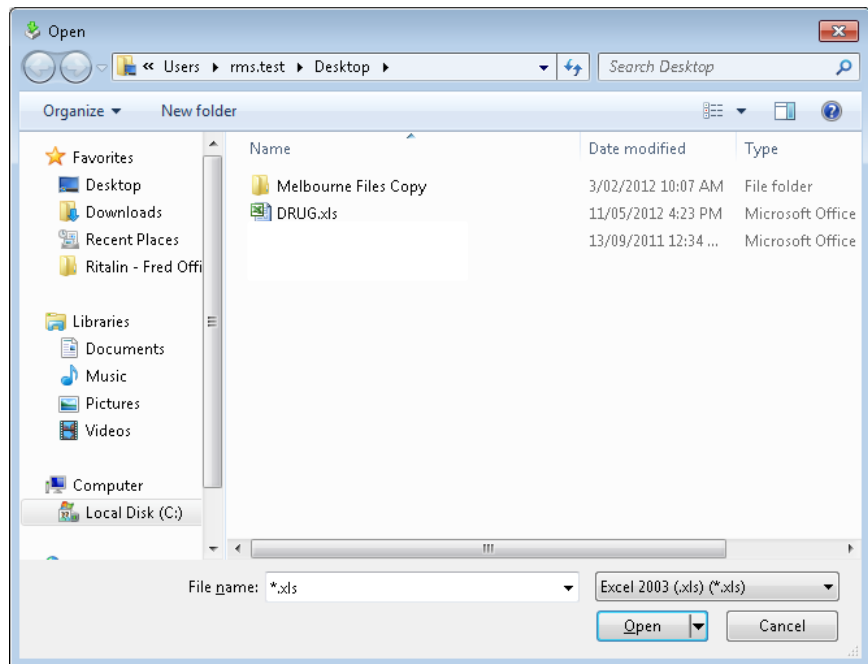
1. Click the **[Import]** button on the toolbar.



The *Data Manager Import Wizard* appears and displays the *Import Settings* window.

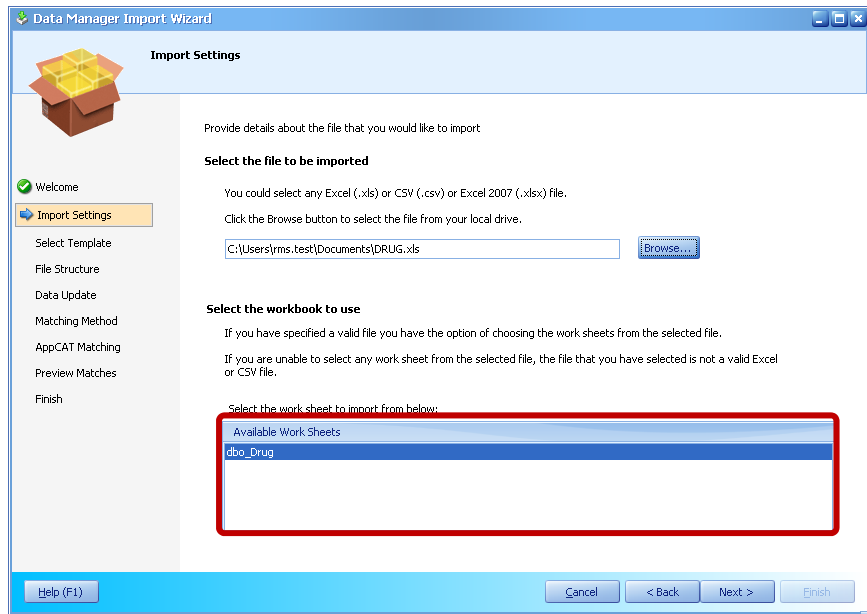
2. In the *Import Settings* window, click the **[Browse]** button.

The *Open* dialog appears.



3. Locate the spreadsheet and then double-click the file to import it.

The chosen file appears under *Available Work Sheets* in the *Import Settings* window.



4. In the Import Settings screen, ensure the worksheet under the **Available Work Sheets** list is displayed, and then click the **[Next]** button.

The *Select Template* window appears.

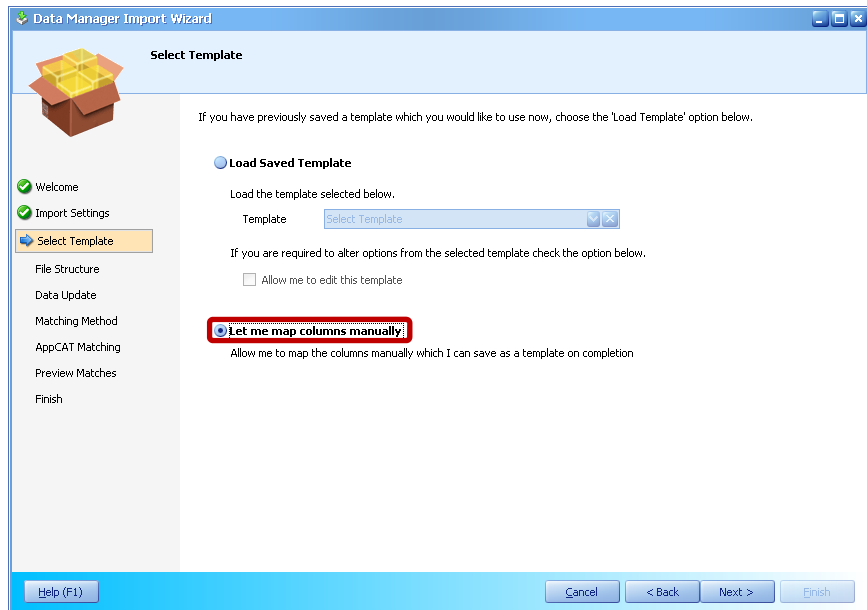
See '*Map columns on the worksheet*' (page 8).

③ Map columns on the worksheet

After creating your new worksheet (see page 6), map the columns manually. Once complete, you can save this as a template and load it to use in the future. See '*Save your template*' (page 15).

To map columns manually:

1. Click **Let me map columns manually**, and then click the **[Next]** button.



The *File Structure* window appears.

2. In the File Structure window, you will need to match the column headings.

Match column headings manually

Match the column headings in Fred Office with the columns in your spreadsheet by matching from the top grid to the corresponding column in the lower grid.

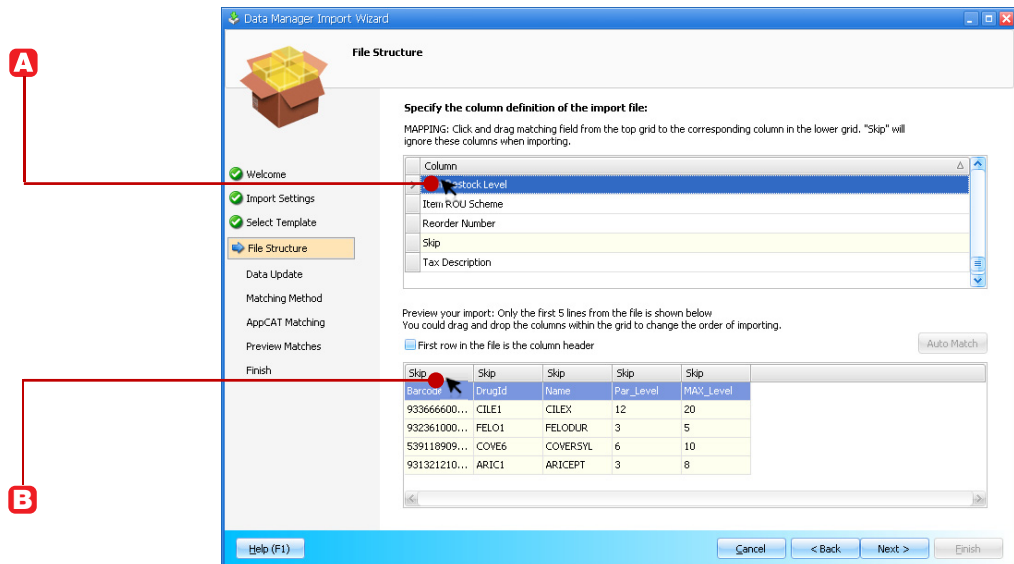
To match column headings manually:

1. In the Data Update window, drag-and-drop the appropriate data columns to import.

Drag this Column item...	In this header...
Item Alias 1	Barcode
Item Alias 2	DrugID
Item Description	Name
Item Reorder Point	Par_Level
Item Restock Level	MAX_Level

2. From the *Column* section, drag and drop on a field and hold your mouse.

- ▶ While holding the mouse **A** drag it down to the header line of the column with the relative information in your data preview displayed below. **B**



- ▶ When your mouse is over the correct column heading, release the mouse button to slot the column heading into the correct position.

3. When complete, click the **[Next]** button.

The *Data Update* window appears.

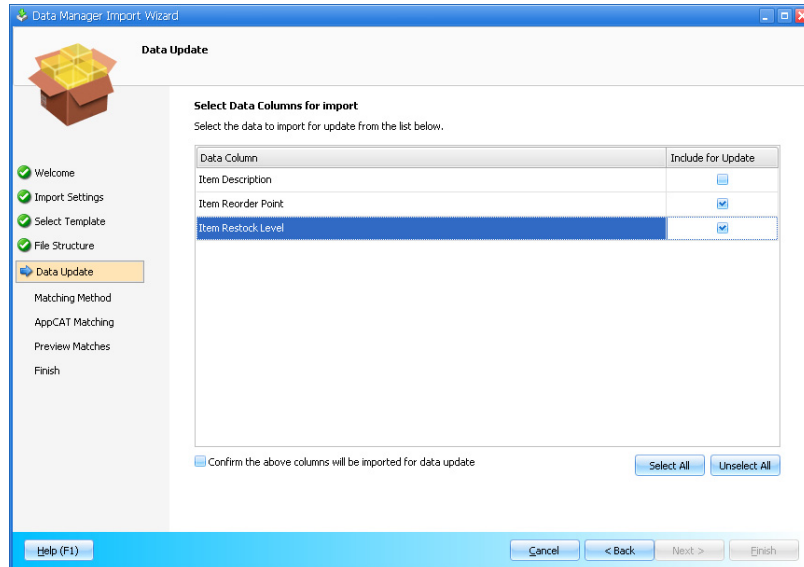
See 'Select data columns to import' (page 10).

4 Select data columns to import

To select columns to import:

1. In the Data Update window, select the following columns to import:

- ▶ *Item Reorder Point*
- ▶ *Item Restock Level*



2. Select **Confirm the above columns will be imported for data update**, and then click **[Next]**.

The *Matching Method* window appears.

See step '*Specify the matching method to use*' (page 11).

5 Specify the matching method to use

To determine whether items in the worksheet already exist or need to be created, select the worksheet fields you wish to use as a matching criteria for items in your Fred Office database.

To specify the matching method to use:

1. Select the fields in the file (*Worksheet Field*) to use to match to fields in your own database (*Item Card Field*).

Specify the matching method to use:	
Worksheet Field	Item Card Field
First use field	Item Alias 1 against field Alias
Then try using field	Item Alias 2 against field Alias
Then try using field	Skip against field Code
Finally try using field	Skip against field Code

2. Match the following:

Worksheet Field:	Item Card Field:
Item Alias 1 to Alias	Alias
Item Alias 2 to Alias	Alias
Skip to Code	Code
Skip to Code	Code

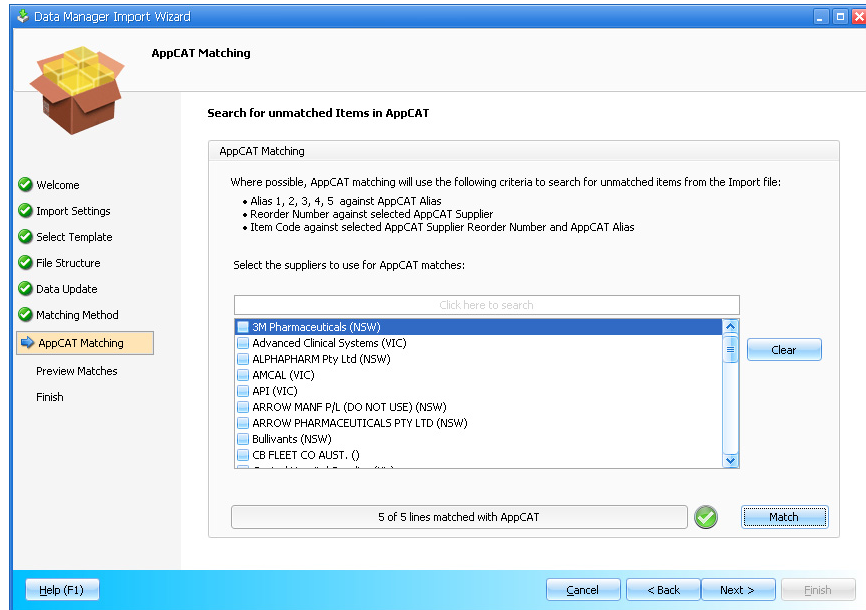
3. Click **[Match]**.
The number of items able to be matched will display.
4. Click the **[Next]** button.

⑥ Search for unmatched items in AppCAT

If any unmatched items were found from the previous step (page 11) the *AppCAT Matching* window will appear. This allows you to find unmatched items using AppCat (if matched by AppCat ID). AppCat matching will use the criteria (page 10) to search for unmatched items.

To search for unmatched items in AppCAT:

1. In the AppCAT Matching window, leave the suppliers unchecked, and then click **[Match]**. Fred Office will locate any times matched in AppCAT.

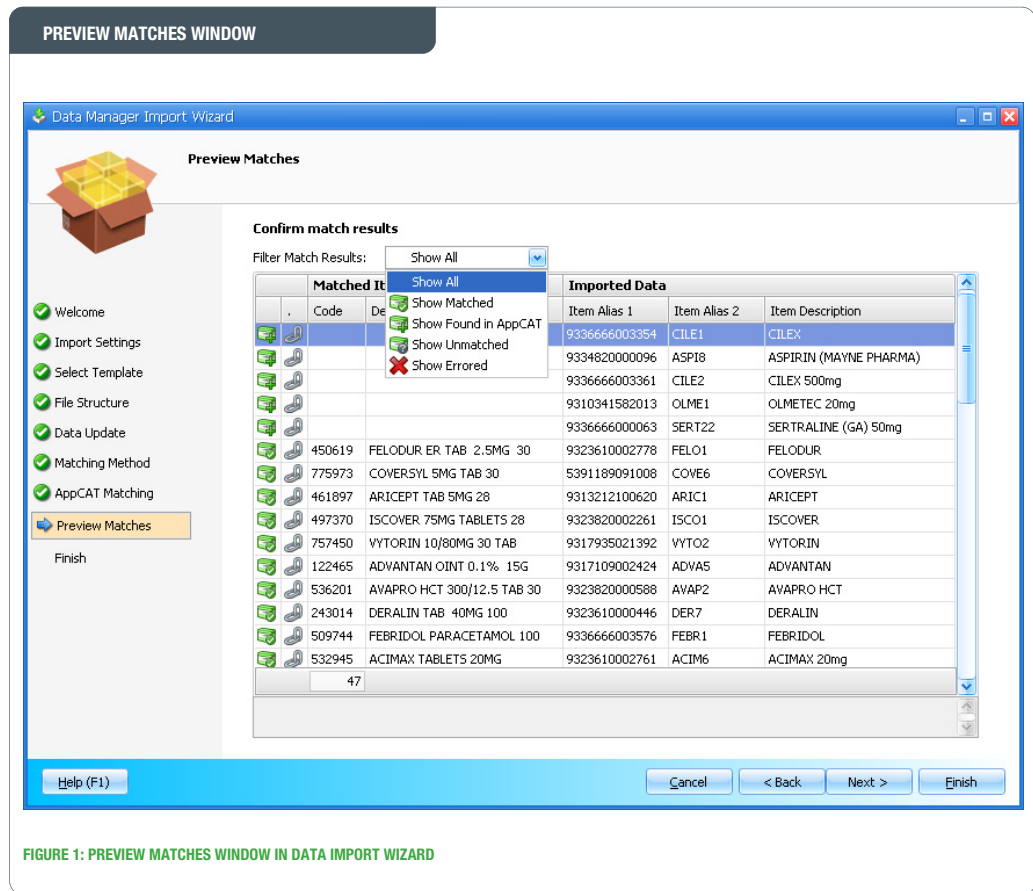


2. Once complete, click the **[Next]** button. The *Preview Matches* screen appears.

7

Preview and confirm matched results

The *Preview Matches* screen will display all items matched. Use this screen to preview any items that were not identified in Fred Office. You can filter the match results to show only relevant items to be reviewed.

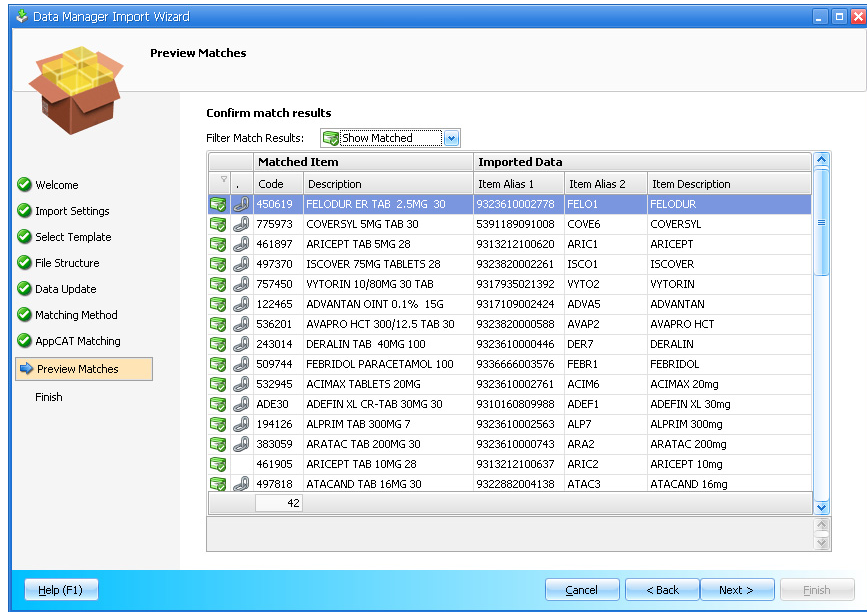


To review and confirm matched results:

1. Review the matches found.



TIP: Right-click functions can be used to perform actions.



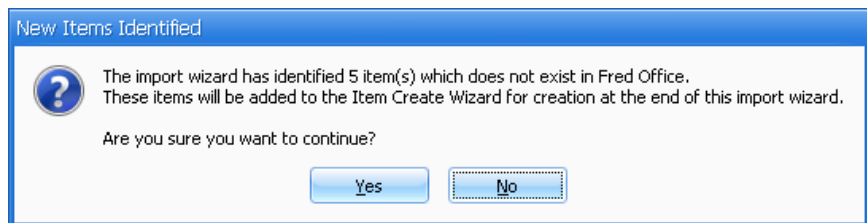
2. Do the following:

To ...	Choose...
Show matching items which already exist in Fred Office.	Show Matched
Show matching items found in AppCAT but do not exist in Fred office.	Show Found in AppCAT
Show items unrecognised in AppCAT and do not exist in Fred Office.	Show Unmatched
Show items which data type is not recognised and no match can be found.	Show Errored

3. Click **[Next]**.

If new items were found, you will be prompted to create these via the *Create Item Wizard* once the current *Data Manager Import Wizard* is finished.

See '*Working with new items not found in Fred Office in Create Item Wizard*' (page 16).



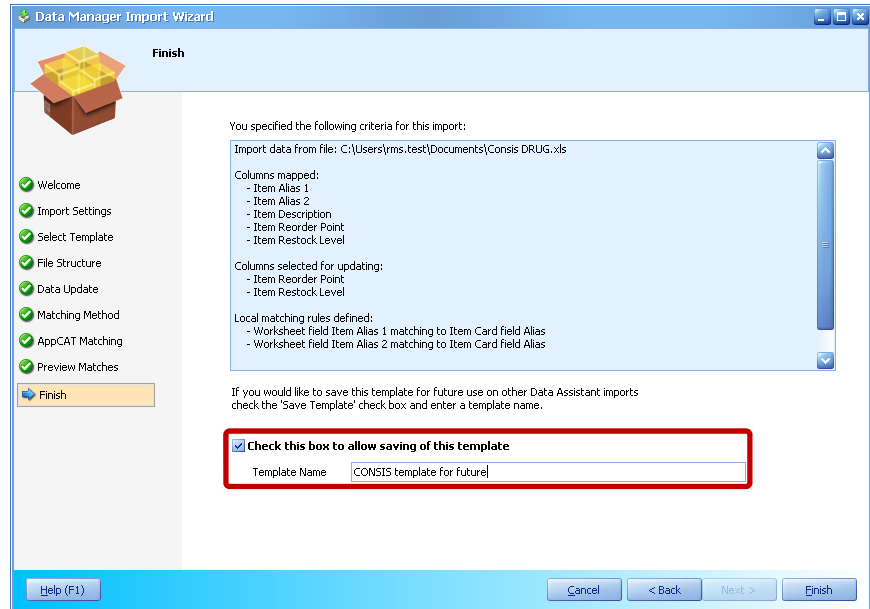
4. To launch the *Create Item Wizard* screen after the *Data Manage Import Wizard* is finished, click **[Yes]**.

8 Save your template

To save you time from mapping columns manually in the future, you have the option to create and save this as a template.

To save finish in the Import Wizard and save your template:

1. Click the **Checkbox to allow saving of this template**, and then in the **Template Name** field, enter a template name meaningful to you.



2. Click **[Finish]**.

The *Item Manager* screen appears displaying all products imported into Fred Office.

Working with new items not found in Fred Office in Create Item Wizard

For imported items that could not be found in Fred Office, the *Create Item Wizard* will appear after you close the *Import Wizard* so you can preview and manually add these items in Fred Office.

Run through the *Create Item Wizard* and work through each product as required.

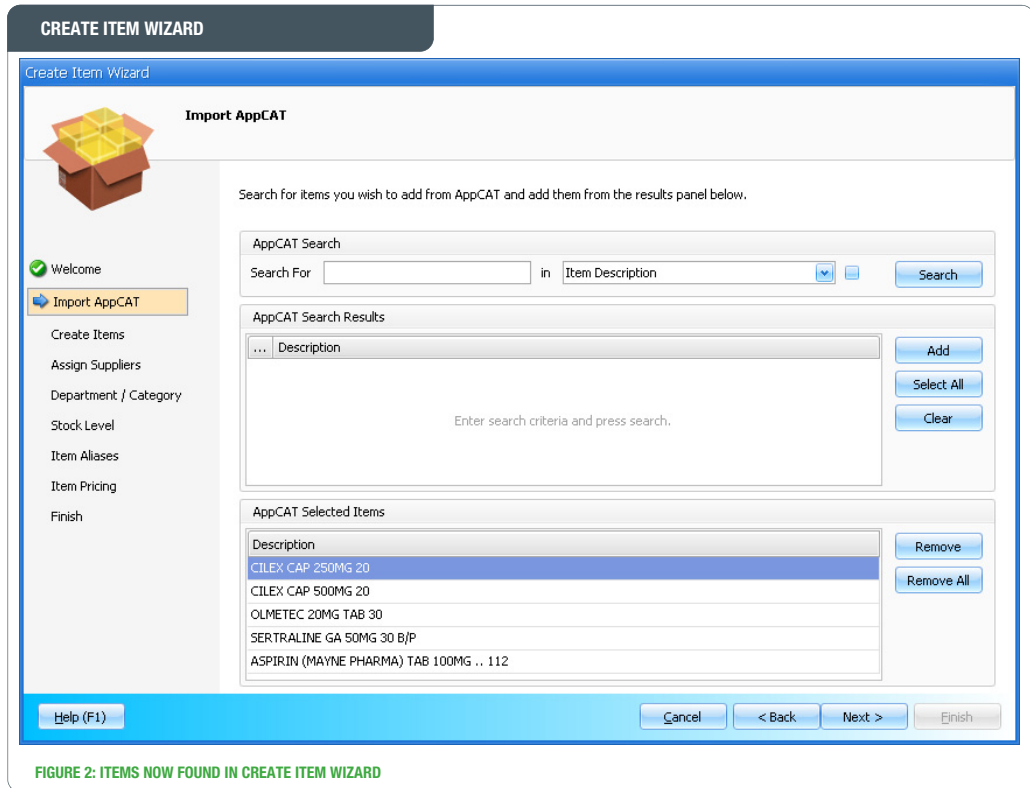


FIGURE 2: ITEMS NOW FOUND IN CREATE ITEM WIZARD

9 Update imported items

The *Ordering Options* screen (Figure 3) shows ordering details of all items in relation to usage (ROU), maximum stock held (*Restock Level*) and minimum stock held (*Reorder Point*).

The *Ordering Options* screen displays the *Reorder Point Current* and *New* values. Update the items in the grid with the data imported via the spread sheet. You can also work with any items errors that need resolving.

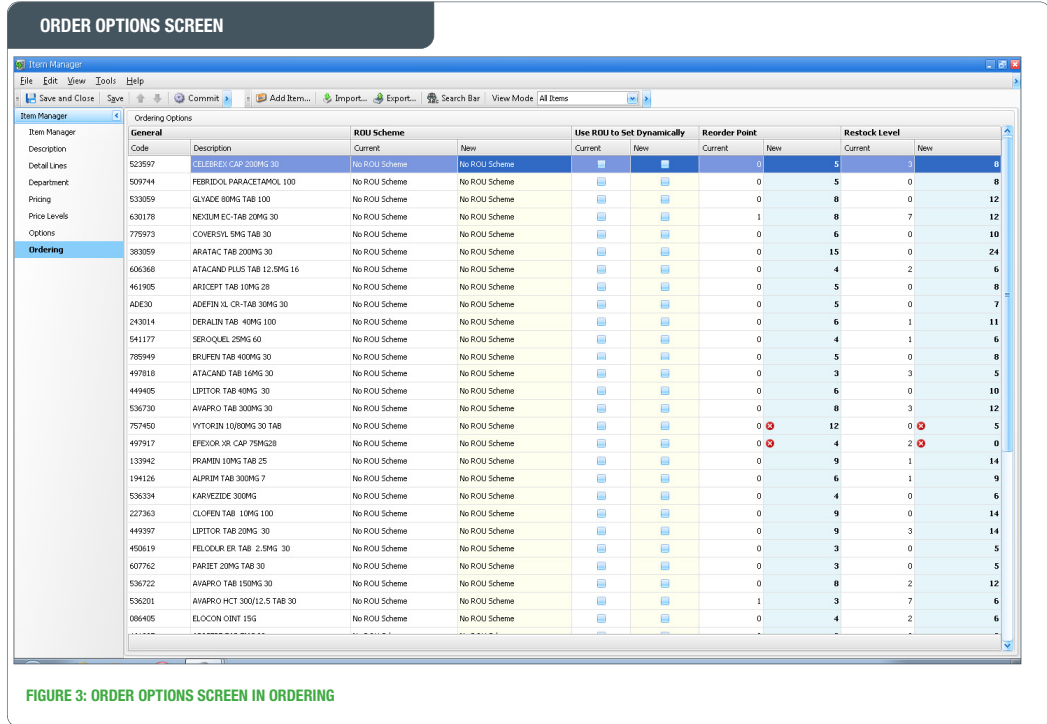


FIGURE 3: ORDER OPTIONS SCREEN IN ORDERING

Items with problems are marked with an error symbol on the screen.

To get to the Ordering Options screen:

- ▶ In Item Manager, select the **Ordering** tab.

To view errors:

- ▶ In the Ordering Options screen, hover the mouse over the error symbol to view problem.

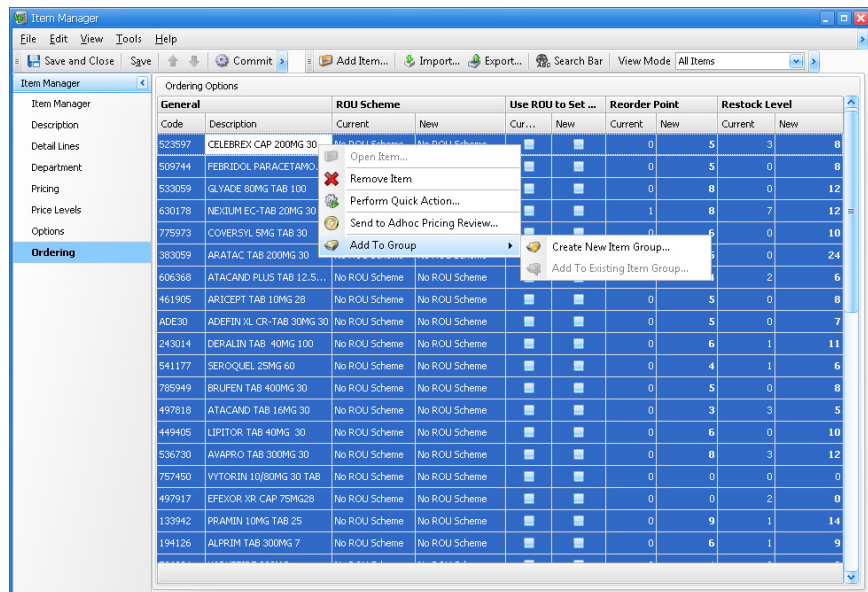
No ROU Scheme			0		12	0		5
No ROU Scheme			0	Reorder Point cannot be greater than or equal to Restock Level				
No ROU Scheme			0		9	1		14
No ROU Scheme			0		6	1		9

Step 2. ADD MATCHED ITEMS TO A GROUP

For Fred Office to distinguish imported items as 'CONSIG' items, create a new *Group* and add these items to that particular Group. Adding CONSIG items to a Group will separate items in the CONSIG machine from other stock in Fred Office — giving you with the ability to easily report, order, stocktake, and price CONSIG items separately from other items.

To add items to a Group:

1. In the Order Options window, press **[CTRL] + [A]** to select all the items in the grid.
2. Right-click and point to **Add To Group**, and then select **Create New Item Group**.



The *New Group* dialog appears.

3. In the **Name** field, enter a name for the group you are creating meaningful to you.
4. In the **Description** field, enter a description for the group you are creating.
5. To save the *Group*, click **[OK]**.

The *Group* window appears for the created group.

6. To finish, click **[Save and Close]** on the toolbar.

Step 3. CREATE A NEW LOCATION CALLED 'CON SIS' USING QUICK ACTION

After you have created a *Group* (see 'Add matched items to a Group', page 18), use the *Quick Action Wizard* to create a new 'Location' column in a draft to identify the items on the CON SIS machine in Fred Office. By adding this column, you will be able to view the items in the CON SIS machine inside a draft.



TIP: The *Location* column is very handy when performing 'other' ordering types, which may turn up the need to order some items inside the CON SIS machine.

To add a new Location:

1. In Item Manager, click the **Description** tab.
2. In the **Item Description** grid, right-click an item and then click **Perform Quick Action...**

Item Description		
General	Description	
Code	Current	New
523597	CELEBREX CAP 200MG 30	CELEBREX CAP
509744	FEBRIDOL PARACETAMOL 100	FEBRIDOL PAR
533059	GLYADE 80MG TAB 100	GLYADE 80MG
630178	NEXIUM EC-TAB 20MG 30	NEXIUM EC-TA
775973	COVERSYL 5MG TAB 30	COVERSYL 5MG
383059	ARATAC TAB 200MG 30	ARATAC TAB 200MG 30
606368	ATACAND PLUS TAB 12.5MG 16	ATACAND PLUS TAB 12.5MG 16
461905	ARICEPT TAB 10MG 28	ARICEPT TAB 10MG 28
ADE30	ADEFIN XL CR-TAB 30MG 30	ADEFIN XL CR-TAB 30MG 30

The *Quick Action Wizard* appears.

3. In the Selection Action window, select **Classification & Options**, and then choose **Set a Location to these Items**.

Quick Action Wizard

Select Action

- ✓ Welcome
- Select Action
- Configure Actions
- Preview Changes
- Apply Changes
- Finished

Select the action you wish to perform

Available Actions

Classification & Options

- Add a Message to these items
- Set a Location to these items
- Set a Rate of Usage Scheme
- Set Item Type
- Set Tax Type
- Set the Department and Category of an Item
- Set the 'Excluded From Loyalty' option
- Set the 'Hide items on Net Display' option

Description

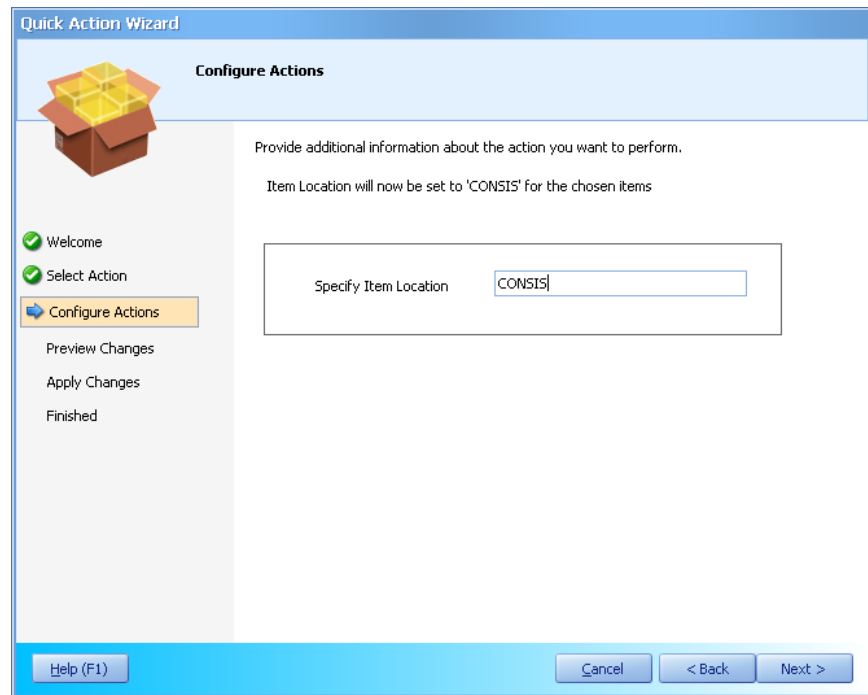
Set a specific location to the items.

Help (F1)
Cancel
< Back
Next >

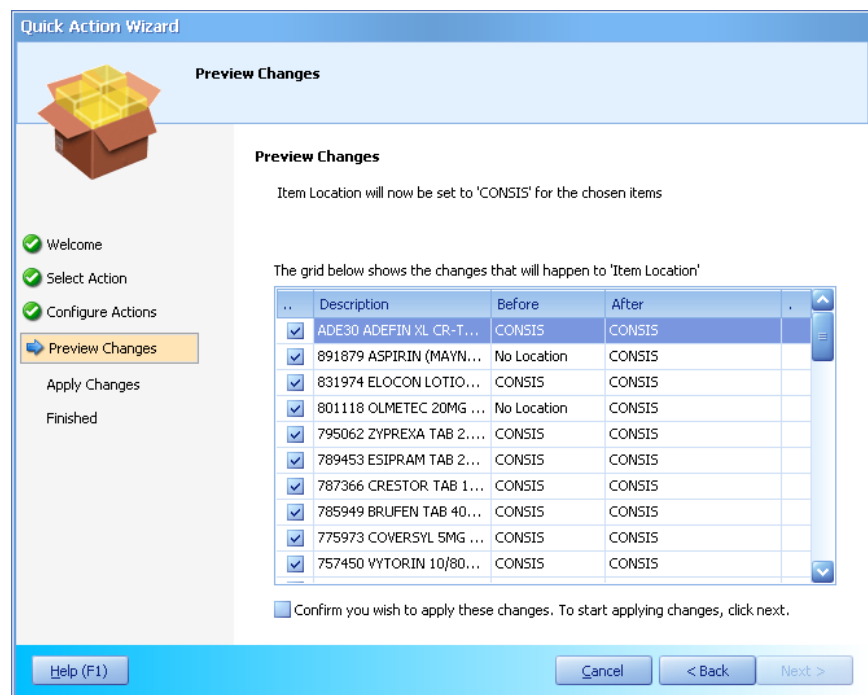
4. Click **[Next]**.

The *Configure Actions* window appears.

5. In the **Specify Items Location** field, enter "CON SIS" or something meaningful to you to help identify that the selected products are in the CON SIS machine.

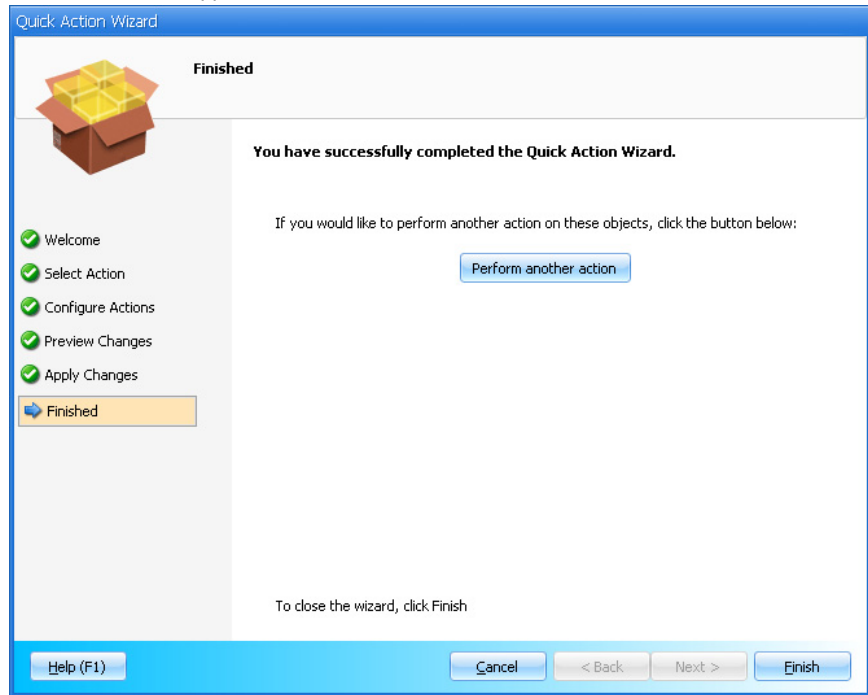


The *Preview Changes* window appears.



6. Select the **Confirm you wish to apply these changes** checkbox, and then click **[Next]**.

The *Finish* window appears.



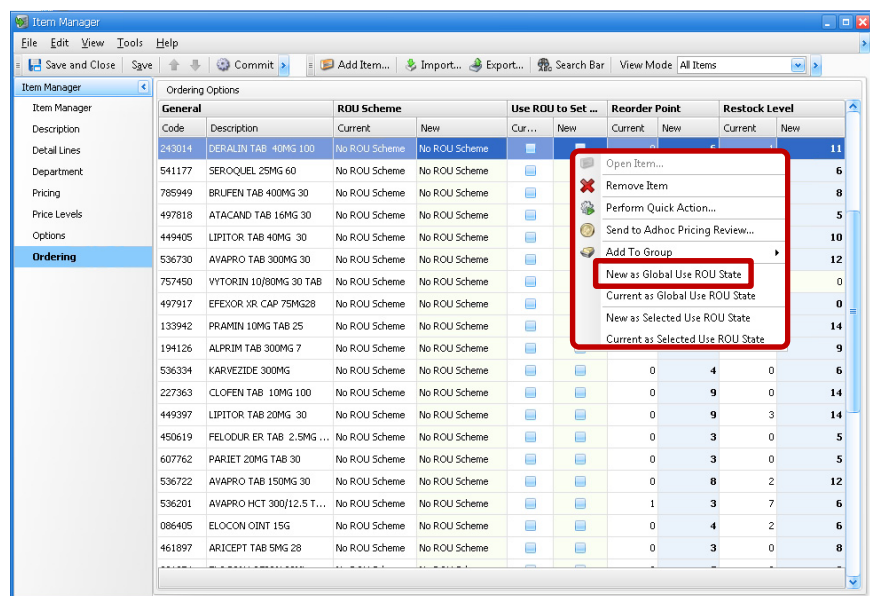
7. Click **[Finish]**.

Step 4. COMMITTING THE IMPORTED AND MATCHED ITEMS

To apply the matched items imported and set the maximum and minimum values, 'commit' the worksheet. Before you commit the worksheet, ensure that any items under the *New* column in the grid are unchecked.

To ensure that all items in the *New* column are unchecked:

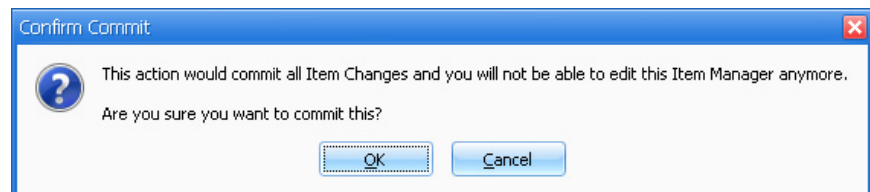
1. In Item Manager, click the **Ordering** tab.
2. In the Ordering Options grid, right-click a row in the "New" column with the checkboxes, and then select **New as Global Use ROU State**.



Fred Office unchecks any items with the checkbox ticked in the *New* column.

3. When complete, click the **[Commit]** button on the toolbar to update all the items and apply the values set.

Fred Office displays a confirmation message.



4. Click **[OK]**.

Fred Office displays the *Item Manager Worksheets* window.

Step 5. BUILDING AN ORDERING PROCESS FOR THE GROUP CREATED

The instructions in this section show the *daily* process to follow for ordering stock in the CONSYS machine. The ordering process indicated in this section allows you to order the items within the CONSYS machine using the data provided in the spreadsheet.

Before you build the ordering process, ensure that you have completed the steps indicated in 'Add matched items to a Group' on page 18.

To build the daily ordering process in Fred Office:

1. From the Fred Office main screen, click the **Ordering** tab, and then click **Drafts**.

The *Drafts* window appears.

2. Click **[New]** on the toolbar.

The *New Draft* screen appears.

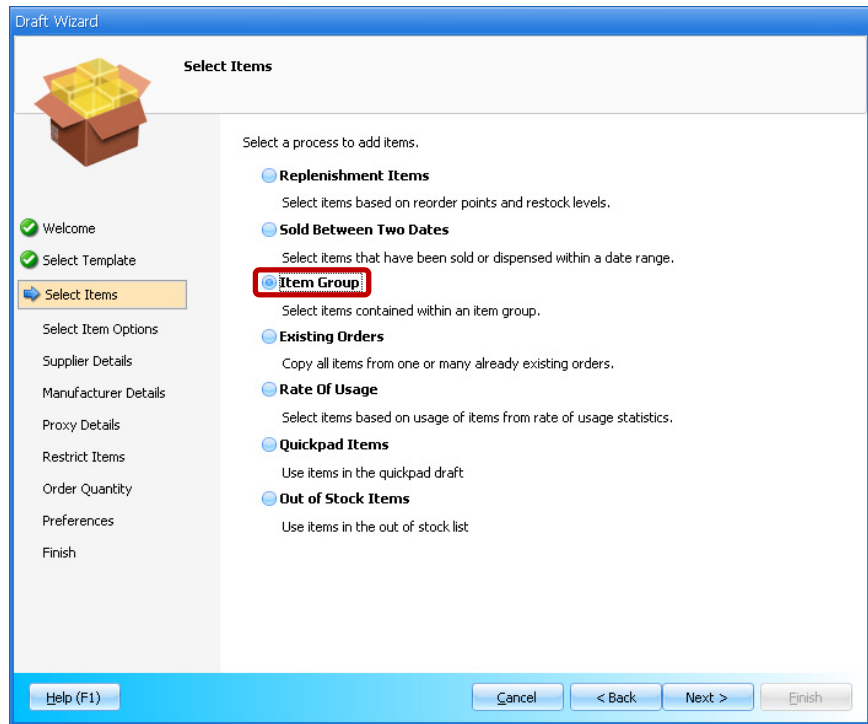
3. In the blank field, enter a name.

4. Select **Use wizard to add items**, and then click **[OK]**.

The *Draft Wizard* appears.

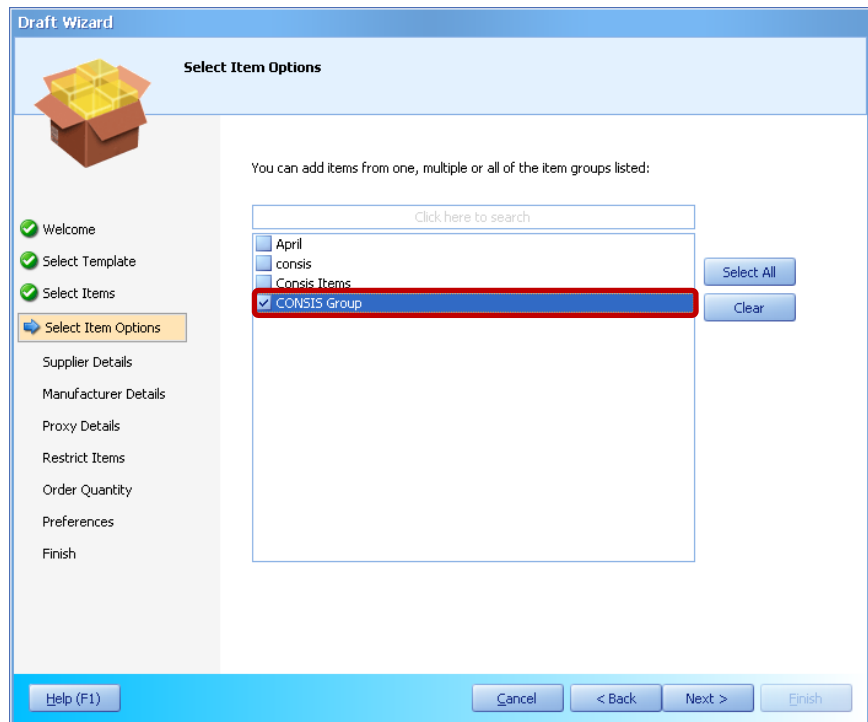
5. In the Select Template window, select **Create New List**, and then click **[Next]**.

The *Select Items* window appears.



The *Select Item Options* window appears.

6. Select the checkbox of the group you just created, and then click **[Next]**.



The *Supplier Details* screen appears.

Draft Wizard

Supplier Details

Check the following store for availability first

Select a store

Select the suppliers. If no suppliers are chosen, items without a supplier may be included.

Only from Supplier

Click here to search

Sigma

Specify the supplier used to order an item from

Any Supplier
The supplier is not important so choose any.

Primary Supplier
Will choose items where the selected suppliers are nominated as the primary supplier only.

- Click the **Any Supplier** option, and then click **[Next]**.

The *Manufacturer Details* window appears.

- Click **[Next]**.

The *Proxy Details* screen appears.

- Click **[Next]**.

The *Restrict Items* window appears.

- Click **[Next]**.

The *Order Quantity* window appears.

Draft Wizard

Order Quantity

Select the process to determine 'how many' to order.

Replenish Stock
Order enough stock based on reorder point and restock level. Items with a restock level of 0 will not be ordered.

Project Item Usage
Select the quantity to order based upon the Rate Of Usage previously determined each item.
Days to Project

Item Group Quantities
Quantity to apply for each item in the group

- Select the **Replenish Stock** option.



TIP: Selecting this option tells Fred Office (of all those items) that if the current QTY is equal to or less than the reorder point, then reorder enough to the restock level.

Note: Depending on your store procedures, choose and add any preferences/options you would like to apply to the items at this point.

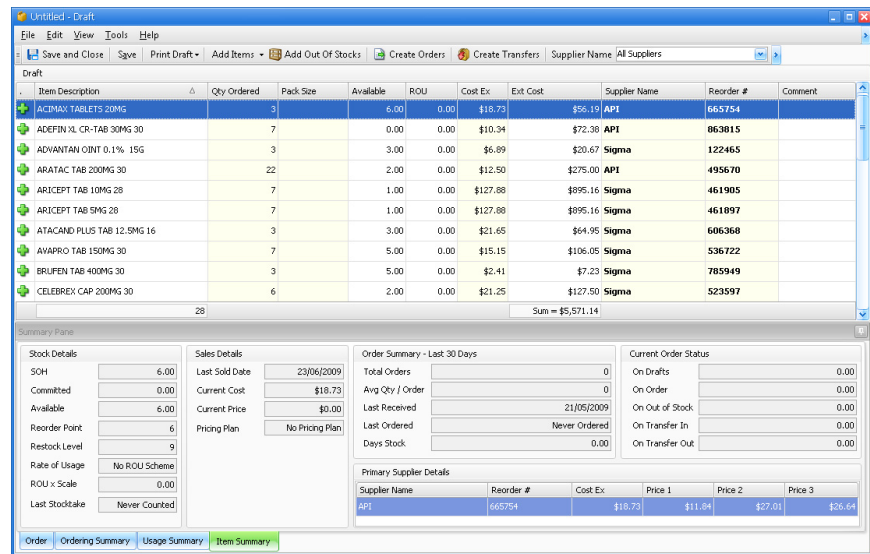
The *Preferences* window appears.

- Click **[Next]**.

The *Finish* window appears.

- Click the **Check this box to allow saving of this template**, and then in the **Template Name** field, enter a template name meaningful to you for future use.
- To complete the process, click **[Finish]**.

Fred Office will now display all CONSIG products in the *Draft* window.

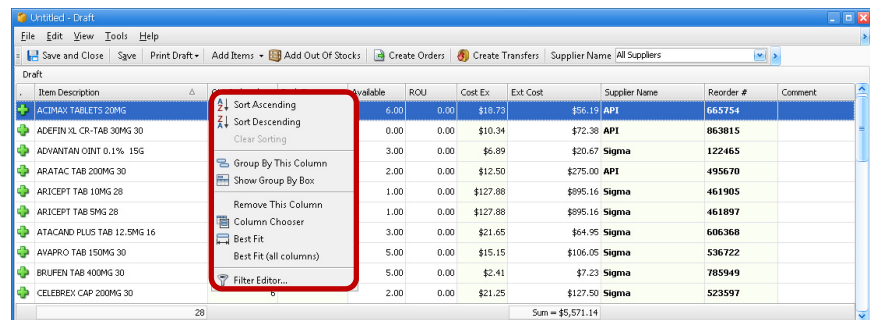


Add new column in the Draft grid

To identify items in the CONSIG machine, you will need to add the *Group* you created (page 18) as a new column in the grid.

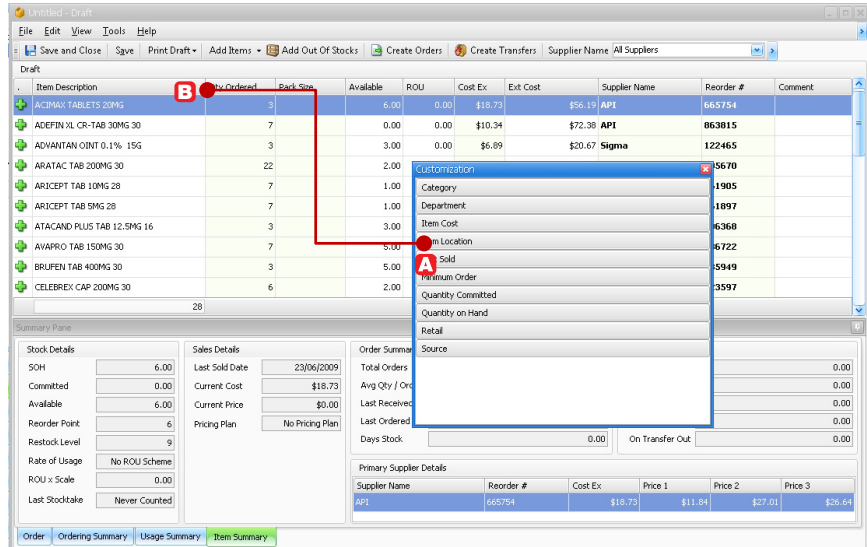
To do add a new column in the Draft grid:

- Click the header of the any column in the grid, and then select **Column Chooser**.

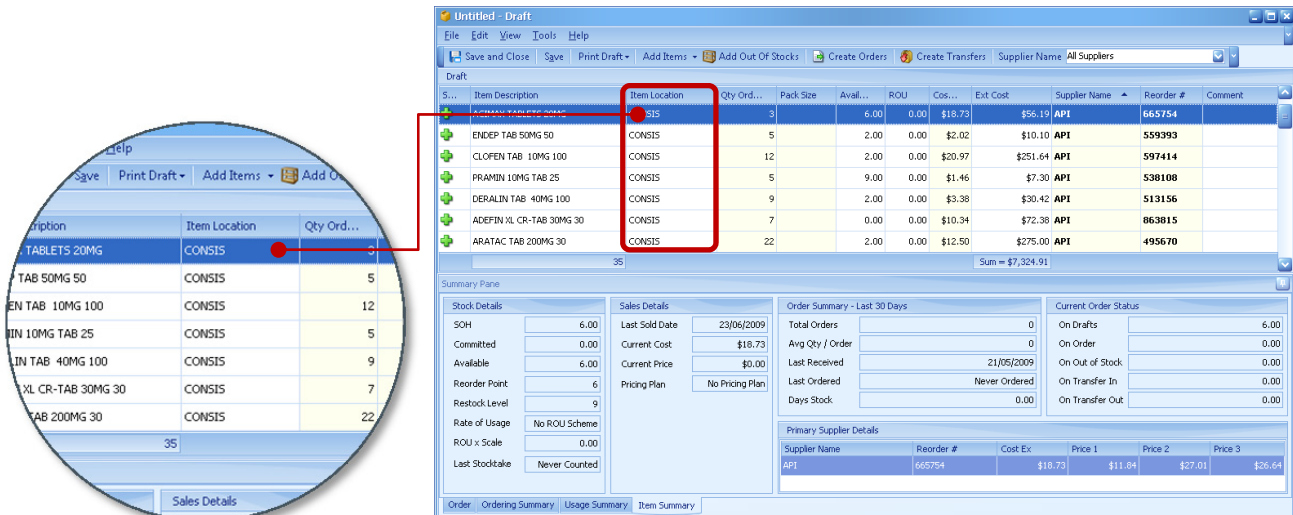


The *Customization* window appears.

2. Drag the **Item Location** **A** column and place it in the Draft grid. **B**



Fred Office adds the Item Location column in the grid. The new **Item Location** column will now display "CONSIS".



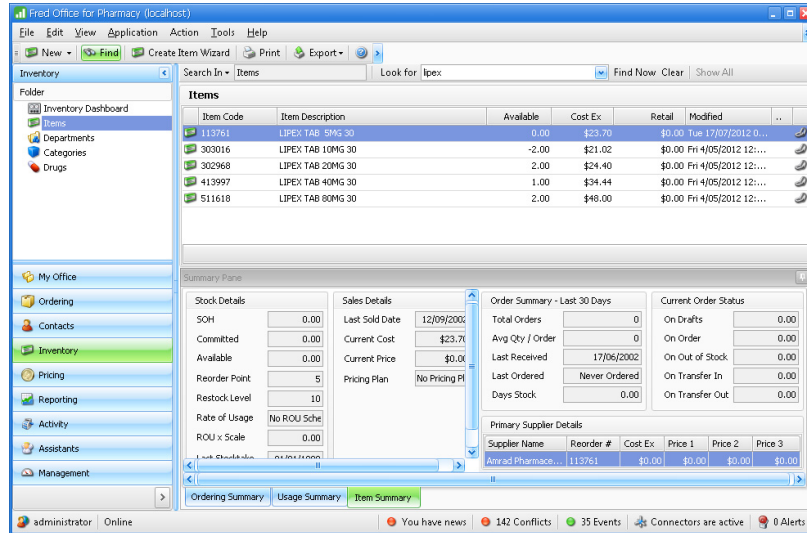
3. Once complete, click [**Save and Close**].

Manually changing the reorder point and restock level of individual items

At any time you can manually adjust the *reorder point* and *restock level* of individual items.

To perform manual adjustments to the reorder point and restock level of individual items:

1. In the **Inventory** tab, choose **Items**.
2. In the **Search In** field, enter the item you wish to search.

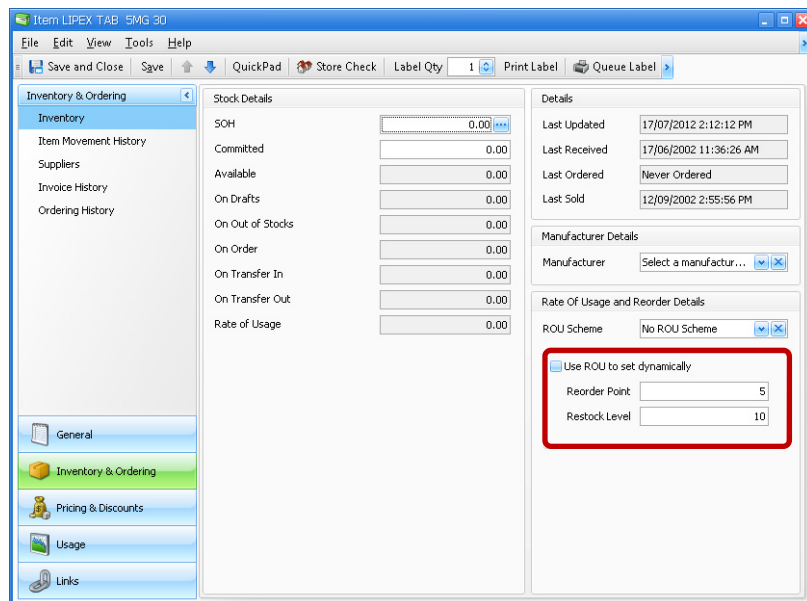


3. Double-click the item to open the Item Card.
The *Item Card* appears for the chosen item.
4. On the bottom-right of the item card, ensure **Use ROU to set dynamically** is deselected.



TIP: You will not be able to update the *Reorder Point* and *Restock Level* fields if the *Use ROU to set dynamically* checkbox is selected. If *Use ROU to set dynamically* is set, deselect the checkbox.

5. Update the **Reorder Point** and **Restock Level** fields as required.



6. Click **[Save and Close]** to finish.

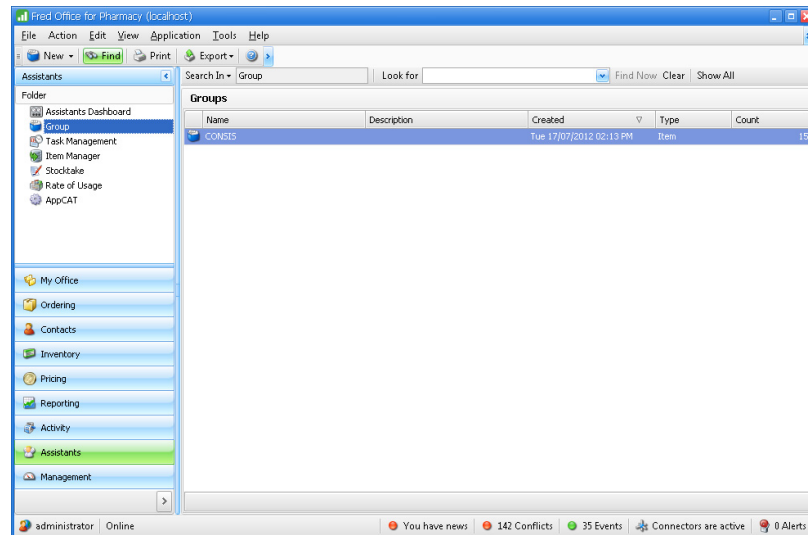
Adding and removing individual items to and from the CONSIS Group

Follow these steps to learn how to add new individual items or remove old items from the *Consis* group created in Fred Office.

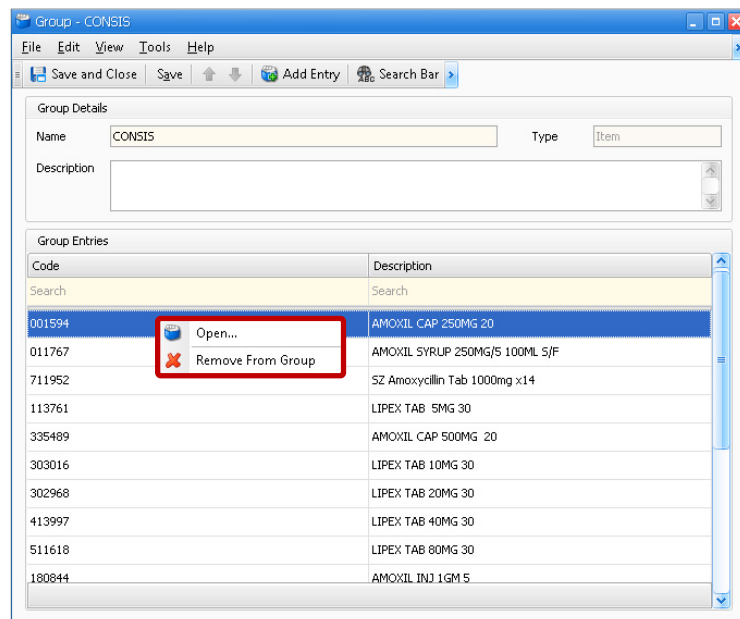
To add or remove individual items to the CONSIS group:

1. In the **Assistants** tab, choose **Group**.

Fred Office lists all created groups.

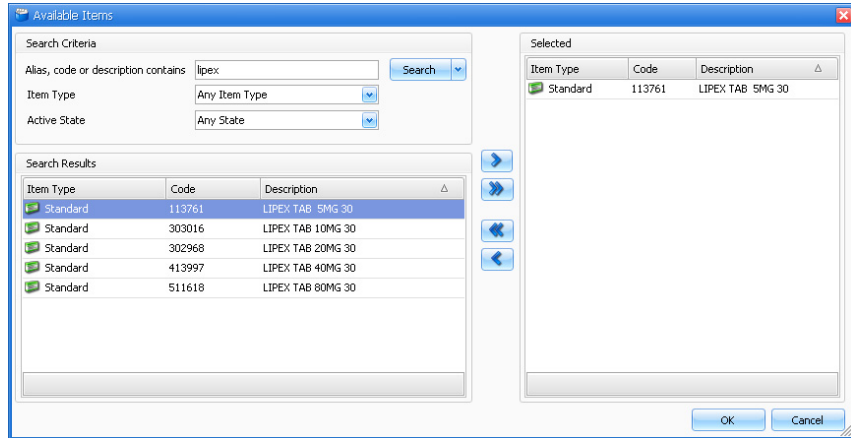


2. Double-click the group *CONSIS* to open it.
3. Fred Office displays the items in the group
4. Do one of the following:
 - ▶ *Remove an individual item:* To remove an item from the group, right-click the item to remove, and then click **[Remove From Group]**.



- ▶ *Add an individual item:* To add an individual item, click **[Add Entry]** on the toolbar.

5. Search for the item(s) you require.



6. Use the [>] [>>] arrows to add the required items, and then press [OK].

The *Group* screen appears.

7. To finish, click [Save and Close] on the toolbar.

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