FRED

FRED OFFICE

DRUG MATCHING

CONTENTS

INTRODUCTION

The Unmatched Script report displays information about prescription drugs dispensed, including whether each drug dispensed was matched a to a Fred Office item at the time the script was sold at point-of-sale (POS).

This document provides step-by-step instructions on:

- Using the Unmatched Script report to review unmatched drugs.
- Matching unmatched drugs to Fred Office items.
- Performing a stock adjustment to correct your stock-on-hand (SOH) levels.

ⓘ   Drug Match should be run once per week and directly after performing a dug update. This will ensure that your dispensing correctly tracks your POS data and that SOH and Gross Profit for dispense items is accurate.

REVIEWING UNMATCHED DRUGS

Run the Unmatched Script Report

1. In Fred Office, go to **Reporting > Script Reports > Unmatched Scripts**.

2. Double-click **Unmatched Script Report**.

3. On the **Report Filter(s)** panel, enter the required **Start** and **End** dates.

ⓘ   We recommend always using the date you had Fred Office installed as the **Start** date.

---

4. Click **Run Report**.

Print the Unmatched Script report

1. Click the **Drug Name** column heading, to sort the unmatched scripts by drug name.

2. Click **Print Preview**. The preview pane is displayed.

3. **Print** the report and keep it on file.

Save and schedule the Unmatched Script report

1. Change the filter **Start** and **End** dates to use the **predefined** option and set it to **6 Months to date**.

ⓘ   This date range will vary, depending on the frequency with which you want the report to be scheduled and updated. Once this report is cleared, you will need to run the report for the time interval you want to maintain and review the unmatched drugs.

2. Click **Run Report**.

3. Click **Save Report As**, then enter a name for the report; for example, "**Current Unmatched Scripts**".

ⓘ   By default, the report has the same name as the system report. You cannot save the report with the same name as a system report.

4. If required, set sharing options, to share the report with staff members or security roles.

5. Click **OK**.

6. Close the report.

7. Click **User Reports**.

8. Click the report you have just saved.

9. Click **Schedule Report**.

10. Click **Enable Schedule.**

11. Fill out the fields to specify when and how often you want to run the report.

12. Click the **Email** tab.

13. Enter the email addresses that the report is to be automatically send to. Separate multiple email addresses with a semicolon (**;**).

14. Click **OK**.

Put all unmatched scripts into a Drug Group

You will use the drug group later in this procedure, to help correct your stock-on-hand.

1. On the Report: Umatched Scripts window, click anywhere in the **Report** panel that shows the unmatched scripts.

2. To select all the drugs displayed, press **[Ctrl+A].**

3. Right-click on one of the selected drugs, then select **Add to Group**, then select **Create New Drug Group...**

The New Group window is displayed.

4. Enter a **Name** and **Description** for your new drug group.
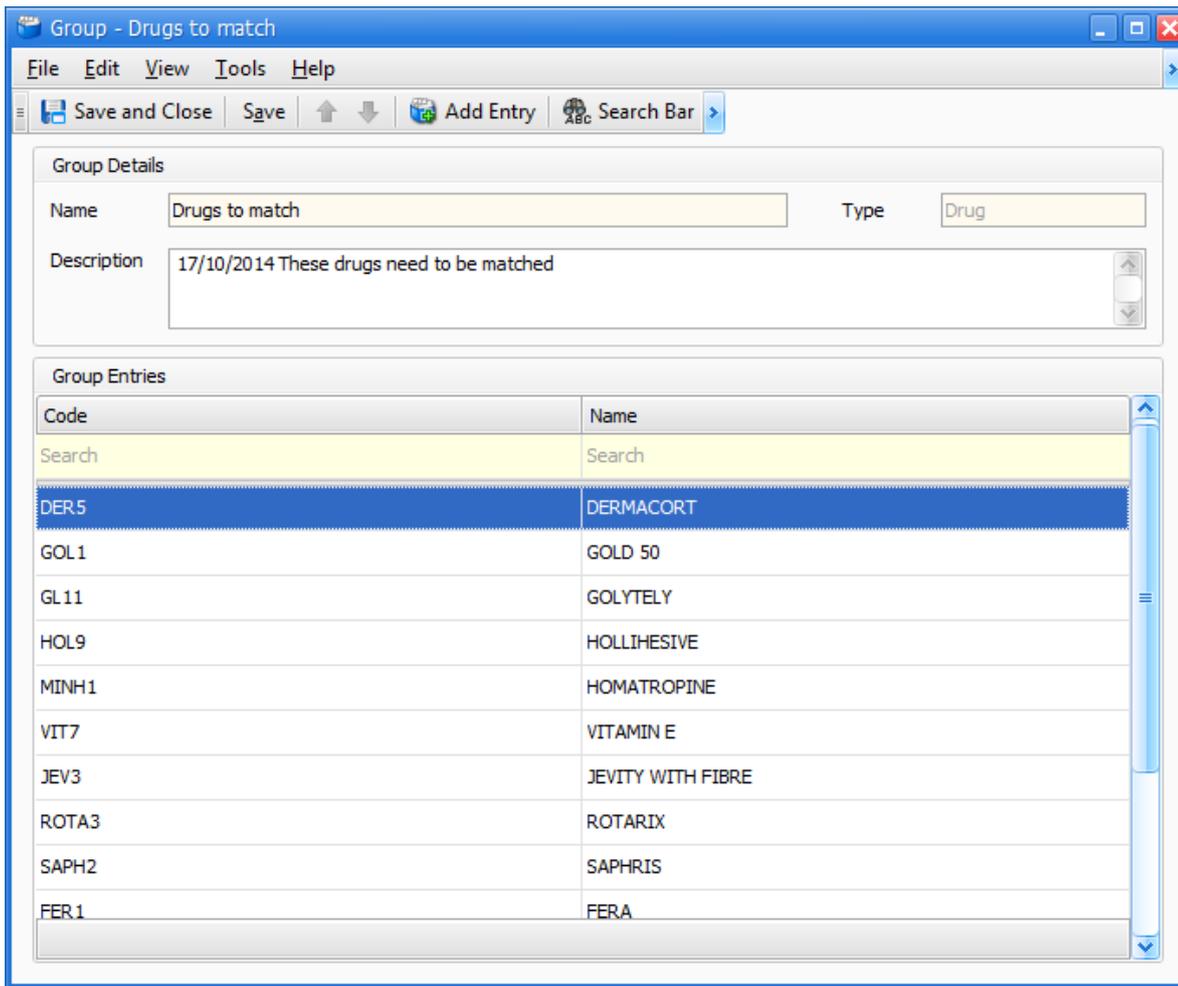

5. Click **OK**.

6. Your new drug group is displayed.

7. Click **Save and Close**.

MATCHING UNMATCHED DRUGS
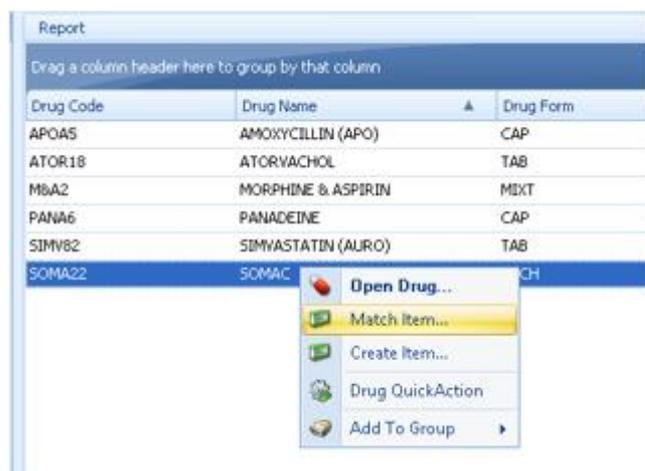
Review and correct the unmatched scripts

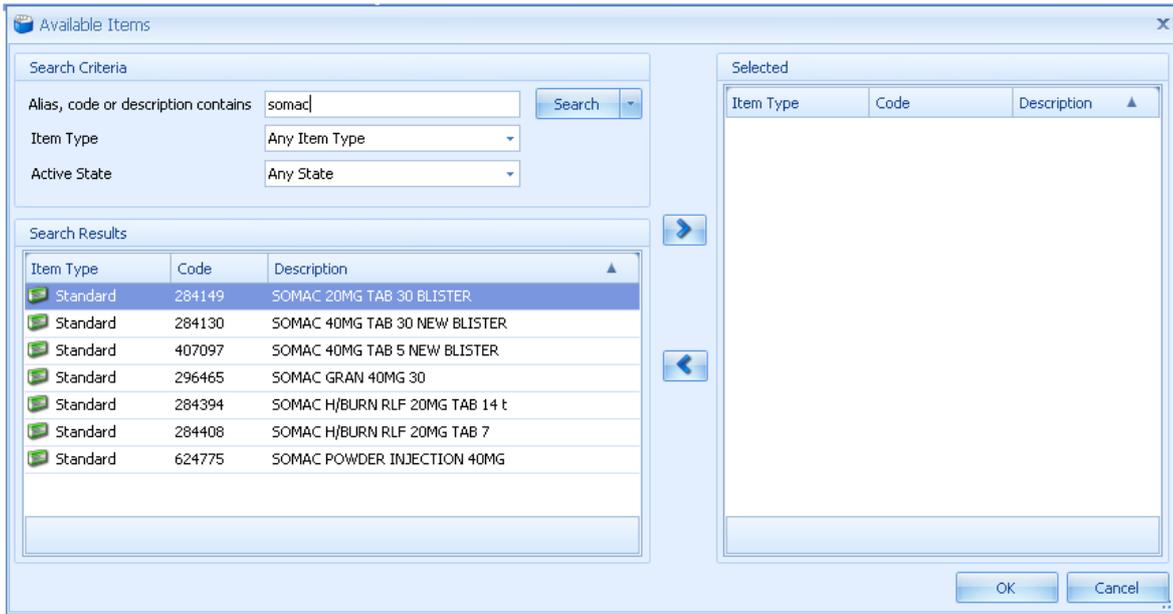There are two options for correcting an unmatched script:

- Match a dispensed drug to an existing Fred Office item
- Create an item, then match a dispensed drug to it

Match a dispensed drug to an existing Fred Office item

1. Right-click a drug you want to match to a Fred Office item, then click **Match Item**.

The available items search window is displayed.

2. In the **Alias, code or description contains** text box, enter all or part of the drug's alias, code, or description.


ⓘ   You will get more useful search results if you avoid making the search term too specific. For example, `Somac` rather than `Somac sachets 40mg 30 pack`.

---

3. Click **Search**.

Any items found are displayed in the **Search Results** section.

ⓘ   If no items are found, try changing your search term. If the required item doesn't exist in your Fred Office database, create it. For details, see "**Create an item, then match a dispensed drug to it**".

---

4. In the **Search Results** section, click to select the correct Fred Office item, then click the right arrow button to move it into the **Selected** section.
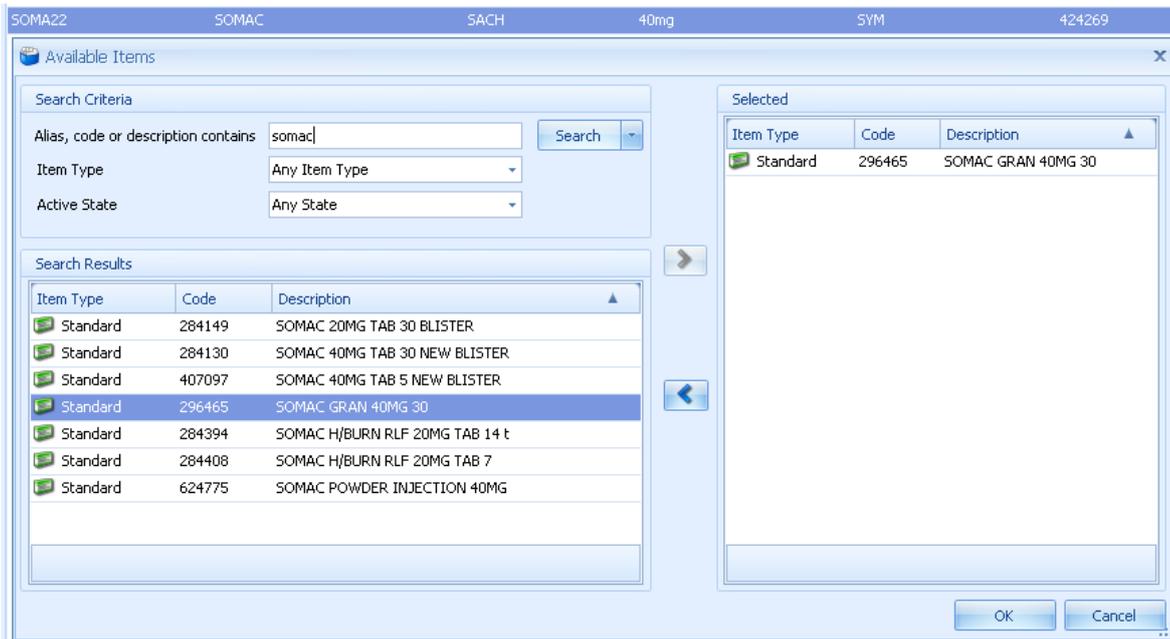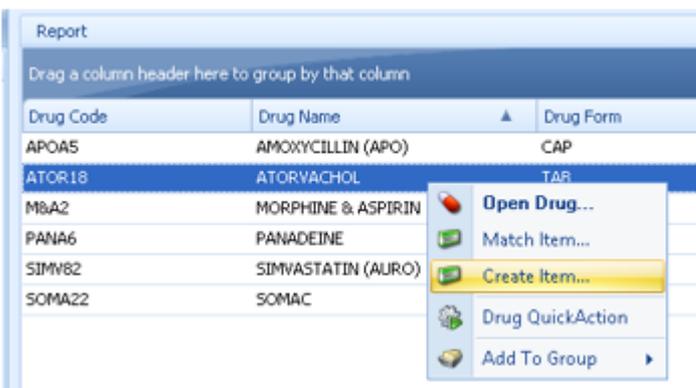

5. Click **OK**.

6. Repeat steps **1** to **5** until you have matched all the unmatched drugs from the report.
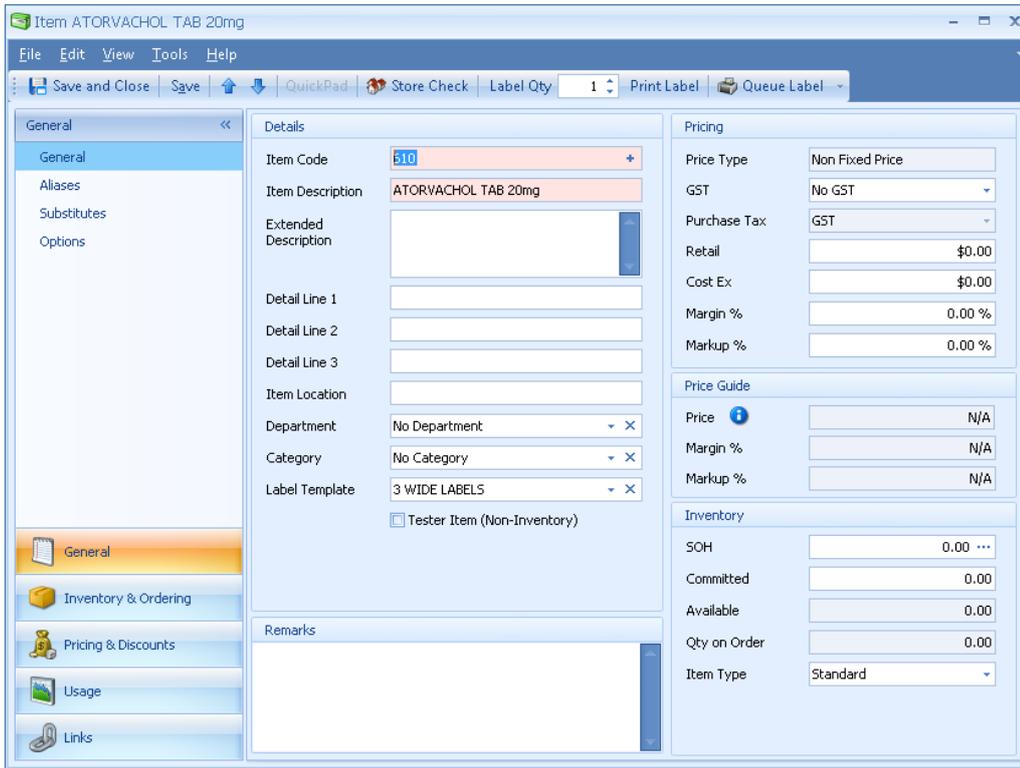
Create an item, then match a dispensed drug to it

ⓘ Only use this process if you have not been able to successfully Match a dispensed drug to an existing Fred Office item.

1. Right-click the drug you want to match to a Fred Office item.
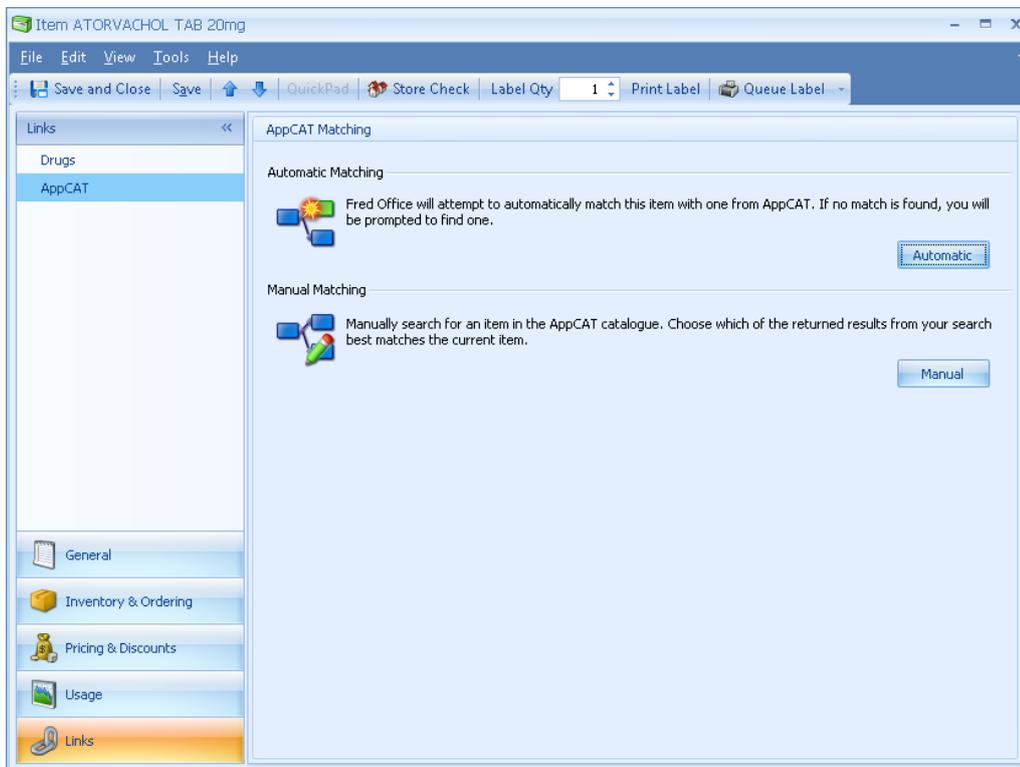
2. Click **Create Item**.

A new item stockcard is displayed and is populated with the drug information.

3.   In the left-hand navigation menu, click **Links**.

4.   In the **Links** menu, click **AppCAT**.

5.   In the **AppCAT Matching** panel, click **Manual**.

The **Manual Matching** panel is displayed.

6. In the **Search For** text box, enter all or part of the drug's description.

ⓘ   You will get more useful search results if you avoid making the search term too specific. For example, `Somac` rather than `Somac sachets 40mg 30 pack`.

7. Click **Search**.

Any items found are displayed.

ⓘ   If the required item does not display in the search results, try another search term; or alternatively, try searching by **Alias** or **Re-order number**.

8. Click to select the drug you want to match.

9. Click **Match**.

Apply any relevant AppCAT updates

Now the item is matched to AppCAT there might be updated AppCAT information that you can apply to the item's stockcard. In the **Change Detail** panel, review the drug details displayed, then apply any relevant differences from the AppCAT listing.
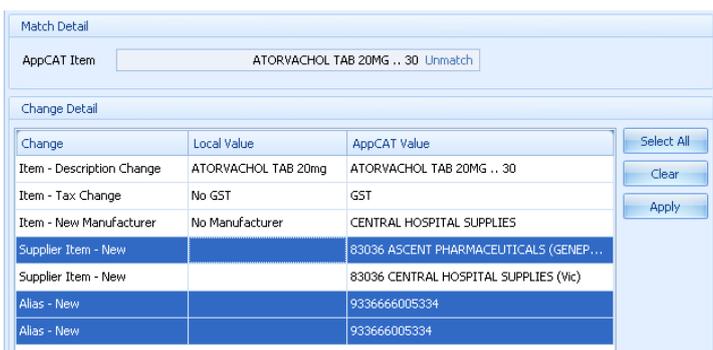
At the minimum, we recommend you apply the following changes:

- Alias – New
- Supplier Item – New (for any relevant suppliers)
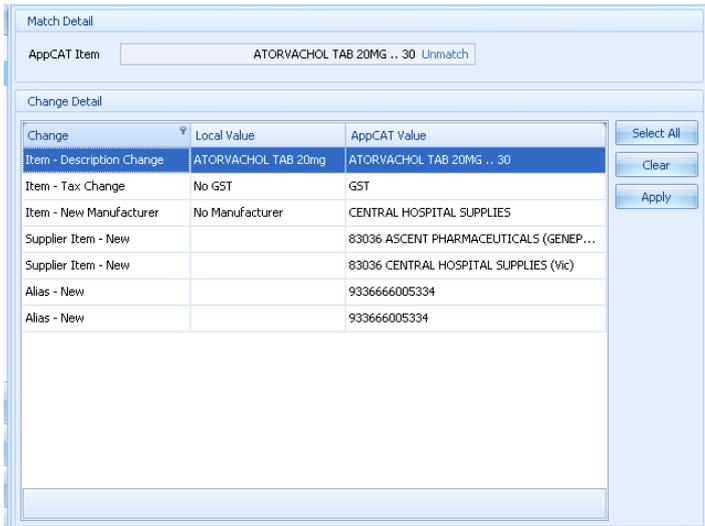
1. Click to highlight a change you want to apply.

2. Click **Apply**.

ⓘ   To select multiple changes to be applied at the same time, hold down [Ctrl] while you click the changes.

The prompt **_Apply changes selected?_** is displayed.

3. Click **Yes**.

4. Once all changes are completed, click **Save and Close**.

ⓘ   You might also want to update further information in the stockcard. For example, the item description; department, GST details, ROU scheme, and so on.

FRED

Run the Drug Usage (Pivot Report)

1. Go to **Reporting > System Reports > Script Reports**.

2. Double-click the **Drug Usage (Pivot Report)**.

3. On the **Report Filters** panel, enter the **Start** and **End** dates.

ⓘ   We recommend always using the date you had Fred Office installed as the **Start** date.
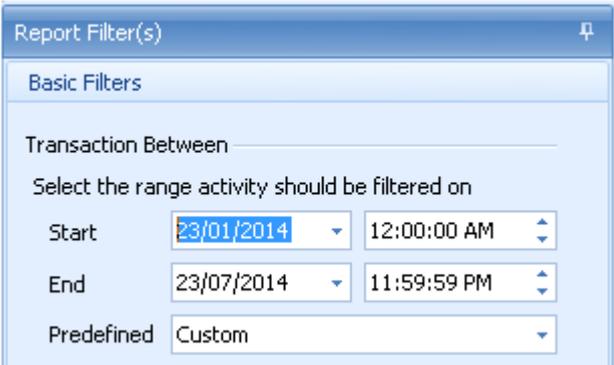
4. In the **Drug Group Selection** field, click to select the drug group you created earlier (for details, see "**Put all unmatched scripts into a Drug Group**").

5. Click the **Drug Description** column heading to sort the list by **Drug Description**.

6. Click **Run Report**.

    Fred Office runs the report.

7. **Print** the Drug Usage (Pivot Report). Keep the printed report; you will use it when you correct your stock-on-hand.

MANUALLY CORRECTING SOH

After matching drugs to existing Fred office items, you will usually need to perform a manual stock adjustment.

ⓘ This adjustment is not usually necessary for drugs that had no matches in Fred Office (that is, drugs for which you had to create a new item in Fred Office before matching), because their SOH will usually be **0**.

1. Click **Inventory > Drugs**.

2. Take the printout of your Drug Usage (Pivot Report), and search Fred Office for the first drug on the list using the **Drug Code**.

3. Double-click to open the relevant drug card.

4. Click the **Item** tab.

5. Click **View** to open the corresponding stockcard.

ⓘ If there is no item description in the **Linked Item** field, this means this drug card needs to be matched to a stockcard. You will need to match the item before continuing. For more details, see "**Matching unmatched drugs**".

6. Click the browse button (**...**) to the right of the **SOH** field.
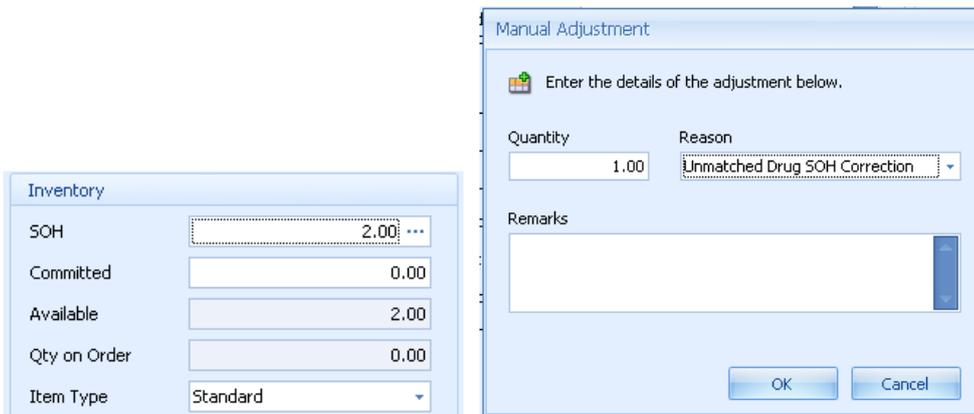
7. Enter the new **SOH** value.

8. If required, select an **adjustment reason**.

ⓘ You can create your own stock adjustment reason codes. For details, see "**Creating a reason code**".

9. If required, enter a **remark**.

10. Click **OK**.

11. Click **Save and Close**.

12. Repeat steps **3** to **11** for all items on the printout.

Creating a reason code

1. Go to **Tools > Reason Codes > Reason Code Management**.
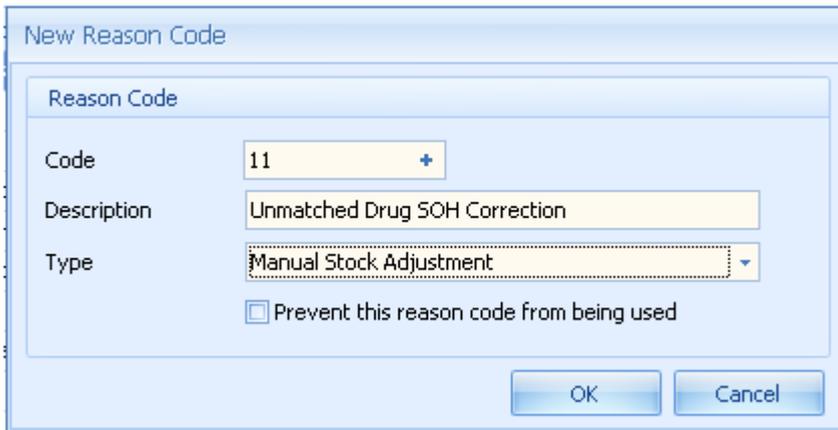
2. Click **Add**.

The New Reason Code window is displayed.

3. To generate the new code, click the **+** to the right of the **Code** field.

4. In the **Description** text box, enter the full description of the code.

5. In the **Type** drop-down list, select the appropriate reason code type. For example, in the screenshot above, we have selected **Manual Stock Adjustment**.

6. Click **OK**.

7. Click **OK**.