



Webinar – Stock Ordering (Retail, Dispensary)

June 2023



Retail-Ordering via Price Lists

- Always create orders based on price lists:
 - This ensures only products that are currently available from that supplier are included in suggested orders
 - Therefore, you will not order items that are discontinued or that they do not stock
- For wholesalers, select **CDC** or **ProPharma** or **PWLBoP**:
 - In the 'Price lists' field press the [spacebar] to see a list of available options
 - Note: You can also use the 'P/L excl.' field to exclude specific price lists (and therefore Items) from being ordered (the example shown will order everything available from CDC except those products also available from Go Healthy and Integra)

Price lists	<input type="text" value="cdc"/>
P/L excl.	<input type="text" value="GoHealthy, Integra"/>

- Only use 'Catalogue', 'Department' or any other selection field when there is not an available price list for that supplier

Retail-Ordering via Price Lists (continued)

- The 'Min cover' denotes the minimum days cover you should have on the shelf and should be at least 7 (or 30+ for monthly orders):
 - if under ordering, increase
 - if over ordering, decrease

Order type	TBC (QVS)	
Supplier	TBC (The Beauty Collective)	
Min cover	30	Max 40

- The 'Max cover' denotes how many days to cover and should be at least 10 (or for monthly orders use 40+)
- Tick 'Costing: Price list' for wholesalers and other suppliers who have minimum order values i.e. \$300
- Tick 'Costing: Last' for all others

Costing :	Price list <input checked="" type="checkbox"/>	Last <input type="checkbox"/>	Std. <input type="checkbox"/>
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Costing :	Price list <input type="checkbox"/>	Last <input checked="" type="checkbox"/>	Std. <input type="checkbox"/>
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Note: the 'Std pricelist' field in a product is not used for ordering – only updating product details i.e. Std cost, RRP, description, barcode, PLU

Retail-Buying Group Ordering

- For buying groups use:
 - GDC (Green Cross / Unichem & Life)
 - CBG (CDC Buying Group)
 - VantageBMonthly OR VantageGMonthly (Propharma Vantage Buying Group)
 - PharmacyFirst (PWL BoP Buying Group)
- Optionally (but recommended) for buying groups include:
 - GXHExclusive with GDC
 - AccessDTCP with CBG (if participating in CDC promotions)
 - VantagePromo with Vantage (if participating in Vantage promotions)
 - PharmacyTimes with PharmacyFirst (if participating in PWL BoP promotions)



Price lists	GDC, GXHExclusive
Price lists	AccessDTCP, CBG
Price lists	VantageGMonthly, VantagePromo
Price lists	PharmacyFirst, PharmacyTimes

Note: if you do not have access to your buying group's price(s) list contact Tonic – support@toniq.co.nz

Retail-Example Order Types

• Daily:

Fortnightly:

Monthly:

Daily:

(but excluding certain P/L's)

Order type	CDC Daily		
Supplier	Cdc		
Min cover	7	Max 10	Show all <input type="checkbox"/>
Catalogue			
Division			
Group			
Dept.			
Price lists	CDC		
P/L excl.			
Type			
Manf.			
Locn.			
Rcv. S/P			
Usage s/pts			
HO note			
Costing :	Price list <input checked="" type="checkbox"/>	Last <input type="checkbox"/>	Std. <input type="checkbox"/> Fetch web order <input type="checkbox"/>

Order type	GDC		
Supplier	GDC		
Min cover	15	Max 20	Show all <input type="checkbox"/>
Catalogue			
Division			
Group			
Dept.			
Price lists	GDC, GXHExclusive		
P/L excl.			
Type			
Manf.			
Locn.			
Rcv. S/P			
Usage s/pts			
HO note			
Costing :	Price list <input checked="" type="checkbox"/>	Last <input type="checkbox"/>	Std. <input type="checkbox"/> Fetch web order <input type="checkbox"/>

Order type	QVS (The Beauty Collective)		
Supplier	TBC		
Min cover	30	Max 45	Show all <input type="checkbox"/>
Catalogue			
Division			
Group			
Dept.			
Price lists	TBC		
P/L excl.			
Type			
Manf.			
Locn.			
Rcv. S/P			
Usage s/pts			
HO note			
Costing :	Price list <input checked="" type="checkbox"/>	Last <input type="checkbox"/>	Std. <input type="checkbox"/> Fetch web order <input type="checkbox"/>

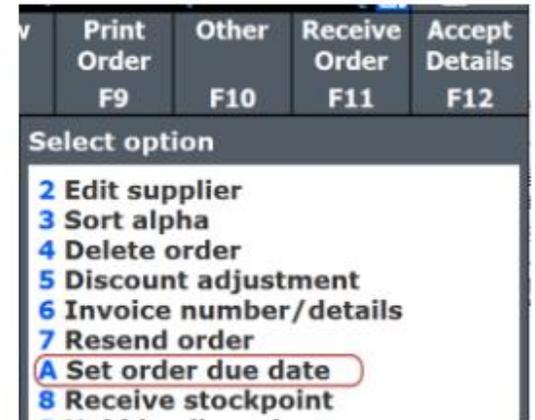
Order type	Propharma		
Supplier	Propharma		
Min cover	7	Max 10	Show all <input type="checkbox"/>
Catalogue			
Division			
Group			
Dept.			
Price lists	ProPharma		
P/L excl.	GoHealthy, Vitaco, EthicalNut, Integria		
Type			
Manf.			
Locn.			
Rcv. S/P			
Usage s/pts			
HO note			
Costing :	Price list <input checked="" type="checkbox"/>	Last <input type="checkbox"/>	Std. <input type="checkbox"/> Fetch web order <input type="checkbox"/>

Note: Always generate and send a buying group order **before** your wholesaler order so that TONIQ knows what stock is expected in (and therefore does not order it again i.e. it is 'Due')

Retail-Future dating orders

If you place orders in advance, expecting them to be delivered in a few months, set the forward date:

- Generate your order and confirm or send as normal
- Go back and edit the order (once sent or confirmed)
- Press F10 Other and select **A** Set forward order date
- Enter the expected arrival date



The items in this order will now continue to order as normal until the date just entered and the TONIq ordering algorithms will consider the stock due (but only from the forward order date)

Note: The stock on order field on these items will show as zero (until the forward date is reached)

Retail & Dispensary-Ordering Shortcuts

When editing an order:

- Press 'N' (or 'n') to set the 'don't order' flag which will prevent this item from being ordered automatically again (i.e. never)
- Press 'H' (or 'h') to defer the item from automatically being ordered until it is next dispensed (i.e. hold until dispensed)
- Press 'D' (or 'd') to defer the item from automatically being ordered until it is next dispensed **OR** until the 1st of the following month – whichever occurs first

Buy	Days	Outer	Cost
	Covr	Pack	
0	13	12	Def(Disp)
0	48		Def(Disp or 1/2)
0	20	12	

Non-diminishing (*meaning the SOH figure does not increase or decrease*):

- From within a product press F4 Stock and tick the box 'Non diminishing' for items such as bottles, paper bags, passport photos – anything that a SOH figure is not required
- This ensures the SOH figure remains at 0 (i.e. does not increase when an order is received or decrease if the item is used or sold)

Passport Photos	
Stock/Retail 0	Stock/Total 0
Defer / /	Defer until sold <input type="checkbox"/>
ReOp.	ReOq
Max SOH	
Request 0	Non diminishing <input checked="" type="checkbox"/>

Retail & Dispensary-Other Ordering

To create a blank / manual order:

- Set the 'Min cover' to **0** (zero)
- Set the 'Max cover' to **N**

Order type	Blank		
Supplier	Toniq Supplier 121		
Min cover	0	Max	N
			Show all ▾

To create a credit order:

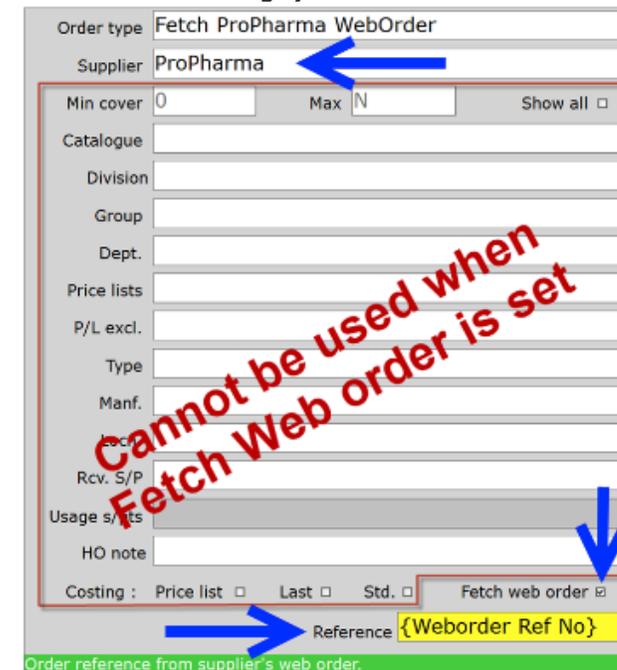
- Set the 'Min cover' to **0** (zero)
- Set the 'Max cover' to **C**

Order type	Credit Order		
Supplier	Toniq Supplier 121		
Min cover	0	Max	C
			Show all ▾

Retail & Dispensary-Fetching an Order

When an order was created on your supplier's website, or is an agent's order supplied via your wholesaler, it is possible to download the order into Tonic (and thus avoid manual data entry)

- Select the 'Blank / Manual' order type or setup a reusable order type 'Fetch Web Order'
- Select the supplier
- Tick option Fetch web order
- Enter the Reference number from the web order
- Press F6 Fetch web order
- Press F12 Accept details



Order type: Fetch ProPharma WebOrder

Supplier: ProPharma

Min cover: 0 Max: N Show all

Catalogue:

Division:

Group:

Dept.:

Price lists:

P/L excl.:

Type:

Manf.:

Rev. S/P:

Usage s/pts:

HO note:

Costing: Price list Last Std. Fetch web order

Reference: {Weborder Ref No}

Order reference from supplier's web order.

Retail & Dispensary-Supplier/Product info

Use a supplier note, or a product supply note, to record (and display to others) specific product information

- **Product:**

- Select the medicine / product and press F4 Stock
- In the field 'Supply note' type the desired information

Supply note no discount for ordering in 3's

- **Supplier:**

- Select the supplier
- In the field 'Notes' type the desired information
- Tick 'Prompt'

Notes Please ensure the order is over \$300 to get it freight free

Prompt

Retail & Dispensary-Purchase History

View when a product was purchased, the supplier, invoice number and cost:

- Retail – from within a stockcard press **F6** Stats then **F8** Purch. History

ENERLYTE Rehydrat. Salts 10sach OTC								
Date	Order#	Invoice	Supplier	Staff	S/P	Qnt	Cost	Unit
20/01/23	13835	8450027	CDC Christchurch	Bob Smith	Retail	6	31.98	5.33
10/11/22	13486	14750825	Vantage	Bob Smith	Retail	2	9.68	4.84
09/11/22	13489	14755355	Propharma	Bob Smith	Retail	8	64.40	8.05

- Dispensary – from within a stockcard press **F6** Med log then **F5** Purch. history

GLYCOPREP ORANGE 70g Sachets								
Date	Order#	Invoice	Supplier	Staff	S/P	Qnt	Cost	Unit
04/04/23	30555	8584090	CDC New Plymouth	KC	Dispensary	2	30.20	15.10
06/03/23	30443	8527958	CDC Napier	AF	Dispensary	2	30.20	15.10
13/12/22	30134		PWL BOP	CT	Dispensary	6	90.60	15.10

Dispensary-Ordering

- The 'Min cover' denotes the minimum days cover you should have on the shelf and should be at least 7 or 25 for a first of the month order:
 - if under ordering, increase
 - if over ordering, decrease
- The 'Max cover' denotes how many days to cover and should be at least 10 (or for monthly orders use 30+)
- The 'Margin' (defined as "buy margin in fractions of packs) should be 0.2
- The 'Med price list' should be CDC or PWLBoP or Propharma / PropharmaNotes
- The 'Outer pack margin' (defined as "buy margin in fractions of a pack" should be 0.6 or 0.1 for a first of the month order
- The 'Defer margin' (defined as "items that have a deferred ordering date, but that date will come due within this many days") should be 0 (zero) or 5 for a first of the month order

Dispensary-Example Order Types

• Daily:

Monthly:

Blank/Manual:

Credit:

Order type	PWL BOP		
Supplier	PWL BOP		
Min cover	7	Max cover	10
Parcel (\$)		Margin	0.20
Manf			
Locn			
Rcv. stock pt			
Usage s/pts			
Med price list	PWL BOP		
Only on price list <input type="checkbox"/>	P/L applicable date : 05/04/2023		
All on price list <input type="checkbox"/>	Outer pack margin	0.60	
Ignore reop <input type="checkbox"/>	Def margin	0	

Order type	1st Month Propharma		
Supplier	Propharma		
Min cover	25	Max cover	30
Parcel (\$)		Margin	0.20
Manf			
Locn			
Rcv. stock pt			
Usage s/pts			
Med price list	PropharmaNotes		
Only on price list <input type="checkbox"/>	P/L applicable date : 06/04/2023		
All on price list <input type="checkbox"/>	Outer pack margin	.1	
Ignore reop <input type="checkbox"/>	Def margin	5	

Order type	blank / manual		
Supplier	CDC Christchurch		
Min cover	0	Max cover	N
Parcel (\$)		Margin	0.00
Manf			
Locn			
Rcv. stock pt			
Usage s/pts			
Med price list	CDC		
Only on price list <input type="checkbox"/>	P/L applicable date : 05/04/2023		
All on price list <input type="checkbox"/>	Outer pack margin	0.00	
Ignore reop <input type="checkbox"/>	Def margin	0	

Order type	Credit		
Supplier	Propharma		
Min cover	0	Max cover	C
Parcel (\$)		Margin	0.00
Manf			
Locn			
Rcv. stock pt			
Usage s/pts			
Med price list	ProPharma		
Only on price list <input type="checkbox"/>			
All on price list <input type="checkbox"/>	Outer pack margin	0.00	
Ignore reop <input type="checkbox"/>	Def margin	0	

Dispensary-Section 29 Ordering

No need to enter these items manually on the wholesaler's website or send a separate order. All wholesalers (PWL BoP, Propharma and CDC) accept these items electronically as part of your normal order:

- Edit the supplier and tick 'Send S29 script details'. The patient and prescriber will then be included in the electronic order to your wholesaler (by ticking the appropriate line when prompted)

EO URL
Auto fetch answerback Send S29 script details

MELATONIN 1mg Capsules						
Dispensary SOH: 223; Total SOH: 223						
Date	Patient	Owe	Quant	Rept	Rx	CT/SP
31/03/23	Miss H Smith		60		1240514/1	Disp
31/03/23	Mr S Jones		30		1240447/0	Disp

If you are manually adding a new medicine tick 'Section 29/26'

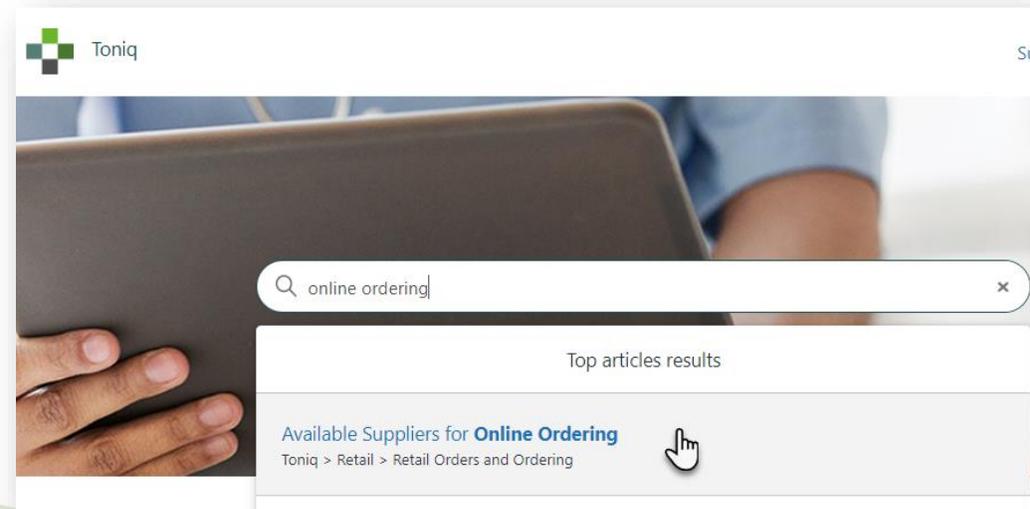
Section 29/26

Note: If you have not yet dispensed a prescription for a Section 29 medicine, consider entering the prescription and putting it on hold (Toniq will then include the patient and prescriber in the electronic order to your wholesaler)

Available Suppliers for Online Ordering

- Tonic supports many suppliers for direct electronic ordering. Some suppliers even provide an immediate answerback (effectively an electronic invoice)
- As well as the wholesalers (PWL BoP, CDC and Propharma) you can electronically order to ANZ Pharma, Douglas, Mondo, The Beauty Collective, McPhersons, USL, L'Oreal, Revlon, Integria, GO Healthy, CS Company, and many more
- For further information (including setup instructions) go into the Tonic Knowledge base and type in 'online ordering'

toniq.nz/help



Toniq Help and Knowledge Base

- Further information can be found in the Toniq Knowledge base:

toniq.nz/help

- Questions?



 **TONIQ**