WinRx Automatic Ordering Setup

Initialize Drug File

- Sign in to WinRx as a supervisor, go to Utilities, then to "Initialize Drug File".
- In the "Set supplier" field set the catalog code you will be using, e.g. "KFB01"
- Hit F10 to process. This will set the Wholesale field in all drug records to the code entered.

Import Catalog

- Sign in to WinRx as a supervisor, go to Utilities, then to "Import Catalog".
- Select the catalog (for McKesson see instructions at arirx.ca/files/WinRx_PCLIK_Setup.pdf)
- Set "reset local drug prices" to "Y" to set the local stock numbers and prices from the selected catalog.
- For any drugs that you do not want updated by the catalog import, browse the drug in WinRx and set "Skip catalog updates" to "Y".
- Hit F10 to import the catalog.

Set Default Wholesale

- In WinRx go to Browse/System, F2 and set the default wholesale code.

Supplier Setup

- Go to Browse/Suppliers and create a new one.
- Set ID to the same catalog/wholesale code as above.
- See pages 56 - 57 of the user guide for supplier setup info (arirx.ca/files/WinRx-Manual.pdf).

Automatic Stock Update Setup

For ordering through WinRx, in each Drug record there must be a Wholesale set (this is done in "initialize drug file"), and values set for Qty, Cost, In Stock, Threshold, Order Qty and Stock #.

Go to Browse/Location and set Stock Control to S for semi-automatic.

> **S** – When the threshold is reached the drug will be added to the Buy list but the In Stock amount will not be updated until the order is submitted. The quantity in the Buy list will show zero and the order quantity will be calculated automatically when the order is sent.

Submitting Order

To submit the order, in WinRx go to Browse > Buy. For any items in the list you do not wish to order, use the F7 key to toggle the status. Status "H" will put the item on hold and will not be included in the order. To send the order, hit F6, then Enter, then F10 to complete the transmission. When it is complete the status of the ordered items with change to "S" for sent (or "F" for file if exporting a file) and the In Stock amounts will be updated in the drug records.

Receiving Orders

After an order is received you can make adjustments by going to Browse > Buy and entering the info in the "process items for goods received" section. From here you can edit items and adjust the actual quantity received if it differs from what was originally ordered.