minfos

Minfos 5.7.1

release notes

January 2019

Together we can

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Enhancements

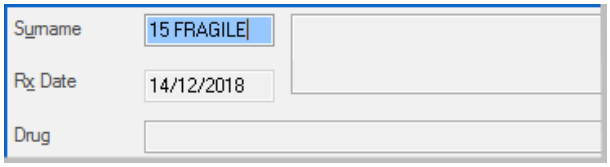
Dispense

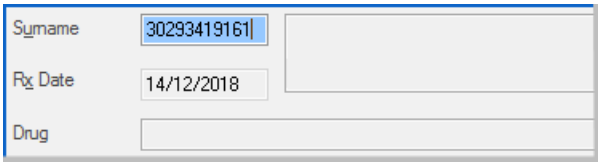
New Patient Search by Street address & Medicare number in Dispense

The customer search function in the **Dispense form** has been improved to allow the pharmacists and dispense techs to search using street number and street name or Medicare number.

To perform a search in the **Dispense** form:

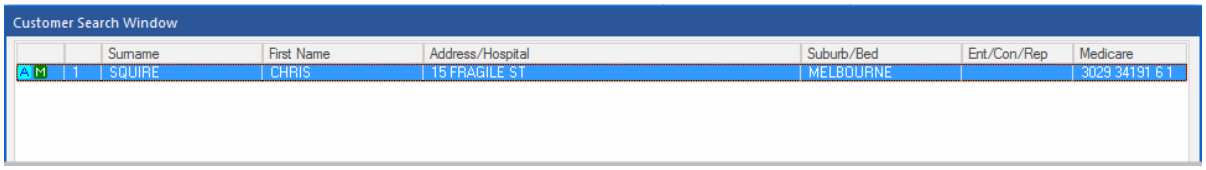
1. In the **Surname** field, enter a street number and part street name *or* Medicare number (with no spaces).





2. Press [Tab] or [Enter].

   The **Customer Search Window** is displayed showing the results of the search.



3. If more than one customer is displayed, double click the correct customer or select and click the **Okay** button.

   The **Dispense** form is populated with the selected customer.

When searching by Medicare Number the results will list all customers in the system with the same Medicare number. Include the IRN if you want a specific customer.

The **Customer Search Window** also has extended search ability.

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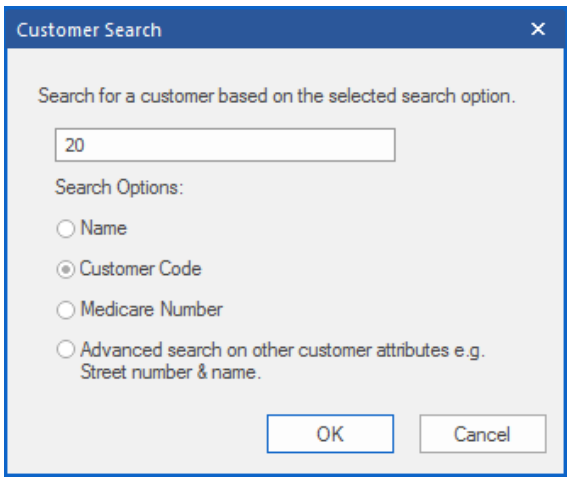
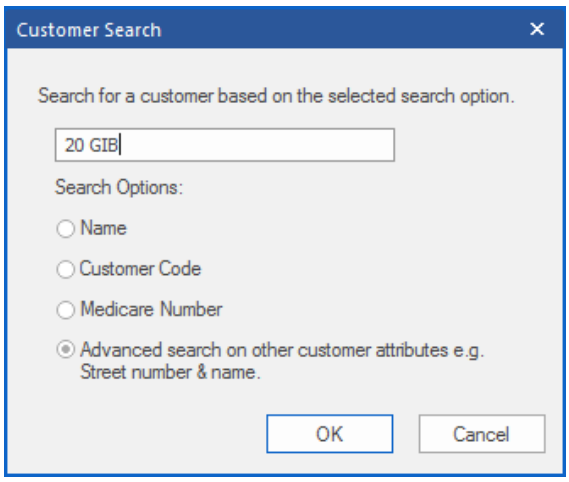
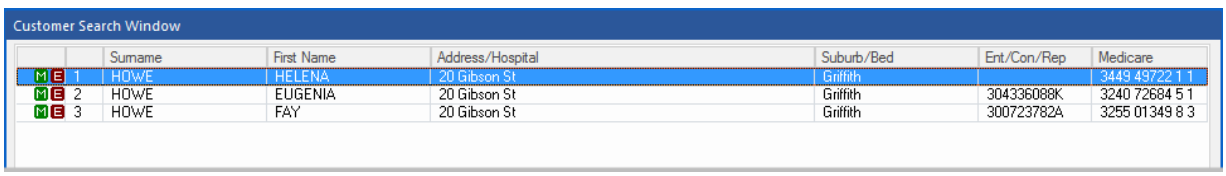
1. Select **Find** [F4] to display the new **Customer Search** dialog.
2. You may select a radio button to confine your search to a particular type or simply start typing into the search box. As you type, the radio buttons will update to indicate the kind of search indicated by your search term. For example, if '20' is typed into the search box, the radio buttons will update to indicate a possible **Customer Code** search.



3. Continued typing of an address is recognised and indicated by the selection of the advanced search radio button.



4. Click the **OK** button to start the search. In this example, all patients with an address of '20 Gibson' have been returned.



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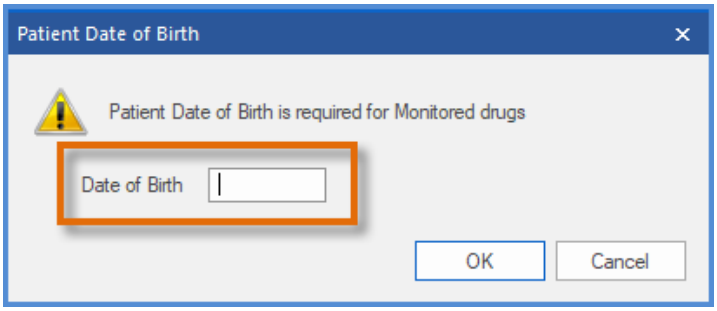
Easily record date of birth from the patient prompt

When dispensing an S8 or Monitored drug to customers without a date of birth in their profile, the **Patient Date of Birth** prompt now contains a field allowing you to enter the date of birth. The date of birth will save to the customer's profile.

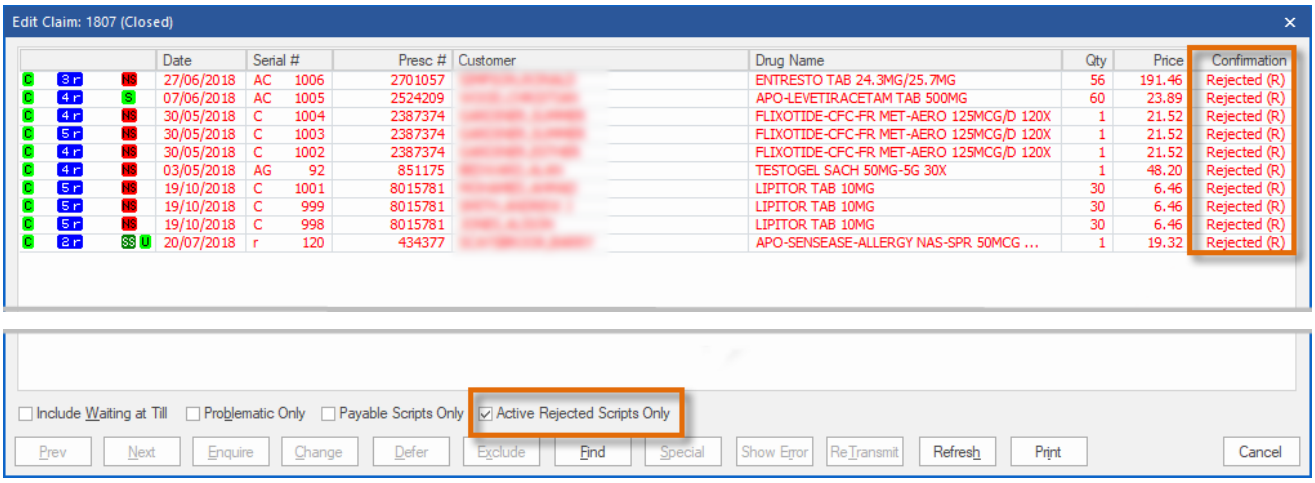


Claims Enhancements

New filter to review Active Rejected Scripts Only

To help simplify the review process for rejected scripts, the **Edit Claim** window now has an **Active Rejected Scripts Only** filter that will display only scripts with an attached PBS reason code of '**R**' (Rejected).

+ Rejected scripts that have been deleted will not display.



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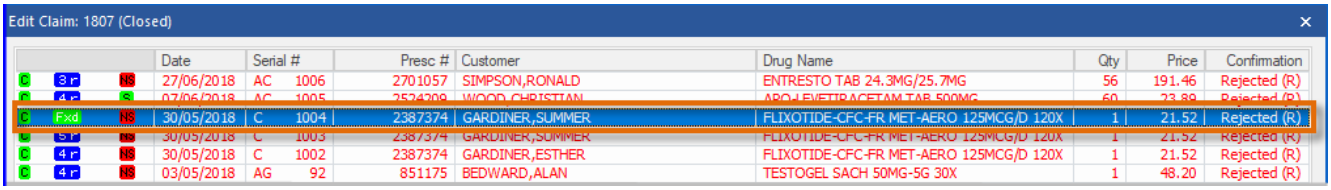
New icon to indicate a script was marked as Fixed

Rejected Scripts that have been marked as 'fixed' in the **Error Notes** window in **Dispense** will now display the **Fixed** icon Fxd in the **Edit Claims** window.



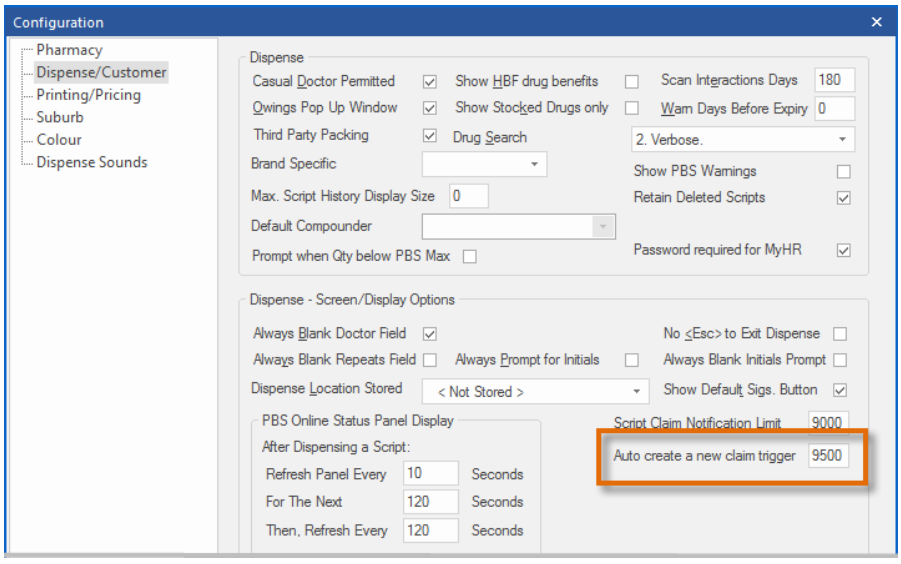
Auto-start New Claim when Current Claim reaches a defined number of scripts

In Minfos 5.6.2 we added a warning that would display when the number of scripts in a claim reached a threshold that you had defined.

This enhancement has been further improved by having Minfos now automatically start a new claim once the number of scripts in a claim has reached the default number of 9,500 (or other user defined limit). Once the limit is reached, a new claim will be automatically started and all new scripts will be placed into the new claim. The status of the previous claim will change to 'Open'.

If you wish to change the number of scripts that will trigger the start of a new claim:

1. From **Dispense Pro**, click the **Maintenance** menu and select **D. Configuration**.
2. Enter the number of scripts, after which Minfos will create a new claim.



> + **The 'Open' claim will still need to be reviewed and closed as per normal process. Minfos does not automatically close claims. Please refer to the Minfos Claims Process user guide for more information.**

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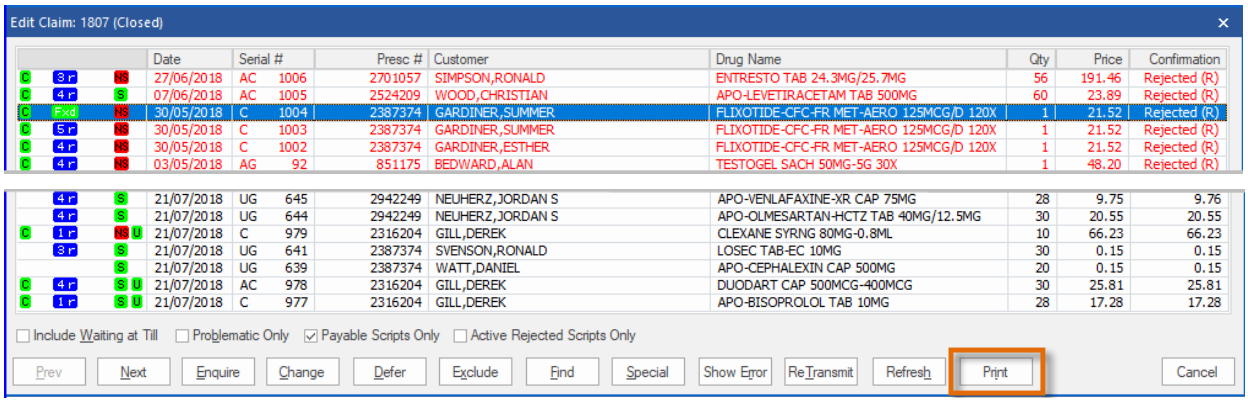
Ability to print the Edit Claim window

The **contents of the Edit Claim** window can now be printed to action required changes in the **Dispense** form, find relevant scripts and investigate issues.

To print the **Edit Claim** window:

1. From **Dispense Pro**, click the **Manage Claims** icon.
   The **Manage Claims** window is displayed.
2. Select the claim and click the **Edit Claim** button.
   The **Edit Claim** window is displayed.



3. Select the **Print** button.
   The **Edit Claim Report** is displayed.
4. **Print** or **Export** the report.

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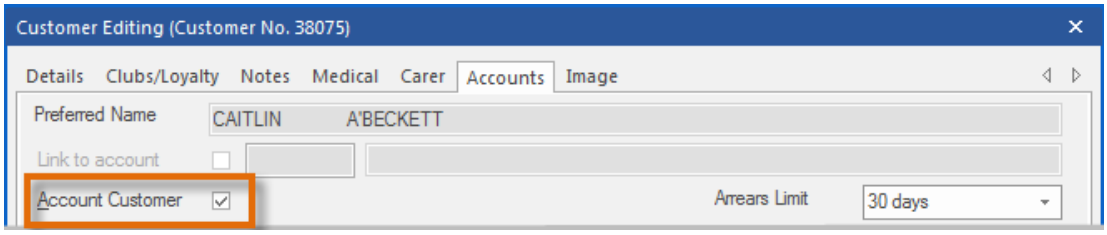
Customers

Auto-invoice scripts to customers

Minfos will now conveniently auto-charge any scripts still waiting at the Till during the EOD process for customers that are set up for auto-invoicing of prescriptions to an account.

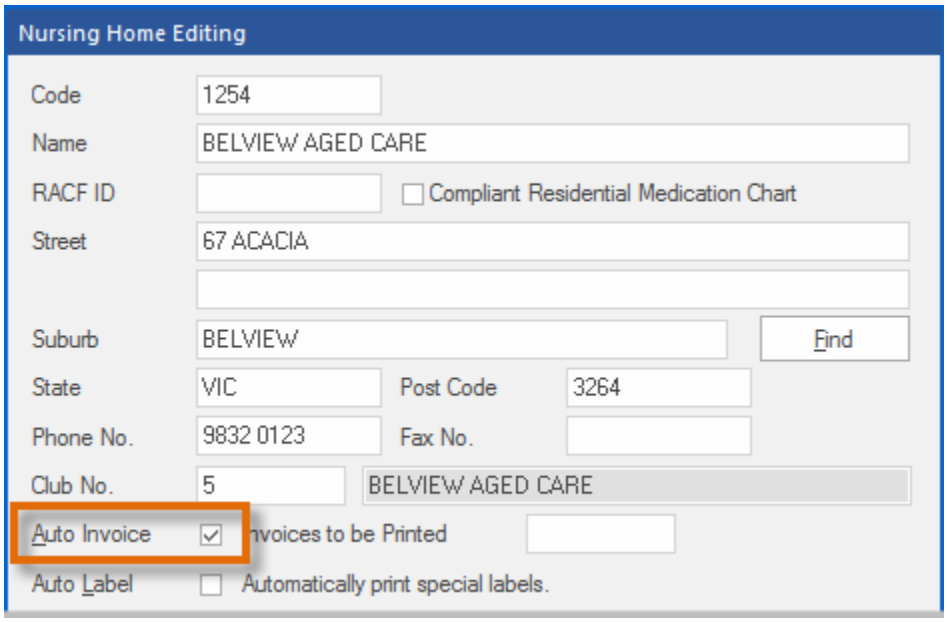
Customers set up for auto-invoicing must satisfy the following criteria:

a. The customer has an account, or is linked to an account.



b. The customer is assigned to a facility in **Customer Maintenance**.

c. The facility is configured for **Auto Invoice** in **Nursing Home Editing**.



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Stock Manager

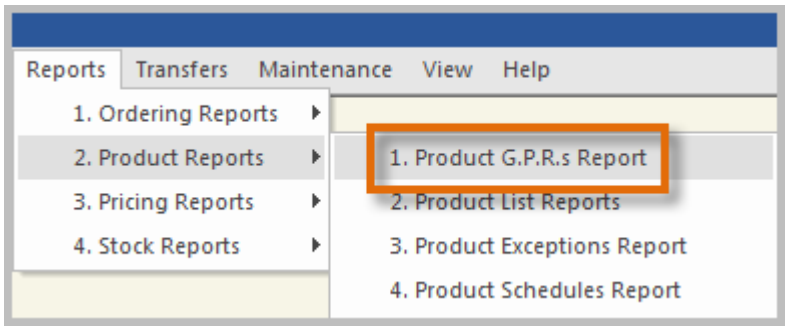
New filter on the Product GP report to exclude KVIs

To improve the ability of the **Product GP Report** to filter out products that may have a legitimate GP within a range that needs review, you can now choose to exclude KVIs.

This option is *not* selected by default.

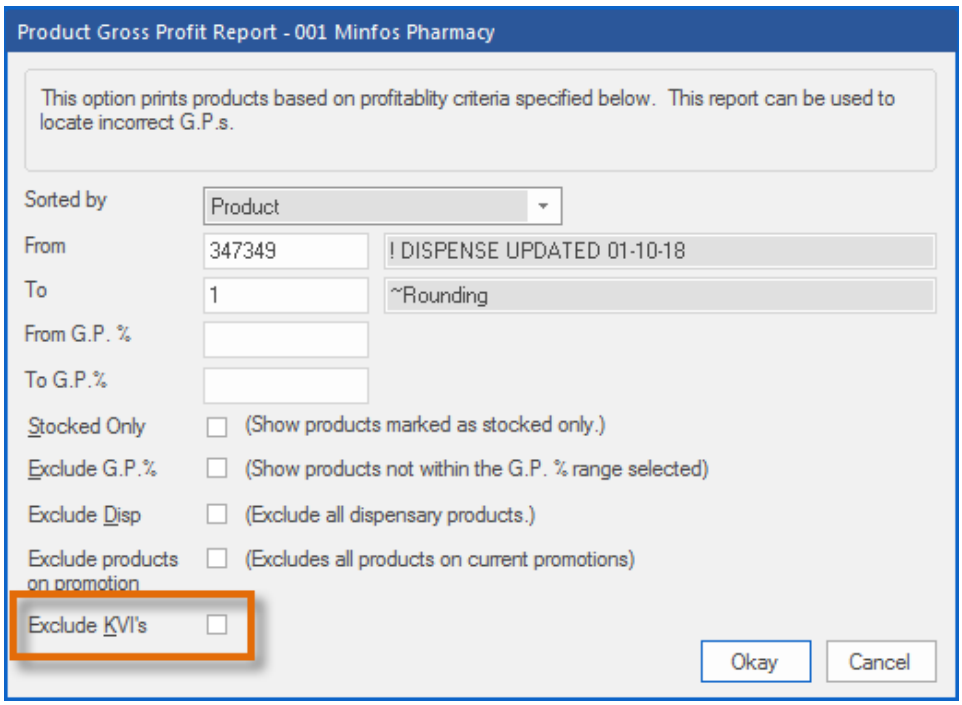
To select this option:

1. From **Stock Manager**, click the **Reports** menu, select **2. Product Reports** and then **1. Product GPRs Report**.



The **Product Gross Profit Report** window is displayed.

2. Select the **Exclude KVIs** checkbox to exclude KVIs from the report.



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Enhancements to the Transferred Products Report

The **Transferred Products Report** now has an improved layout as well as additional product information to increase its usefulness for both the Supplying and Receiving stores.

These improvements include:

Layout

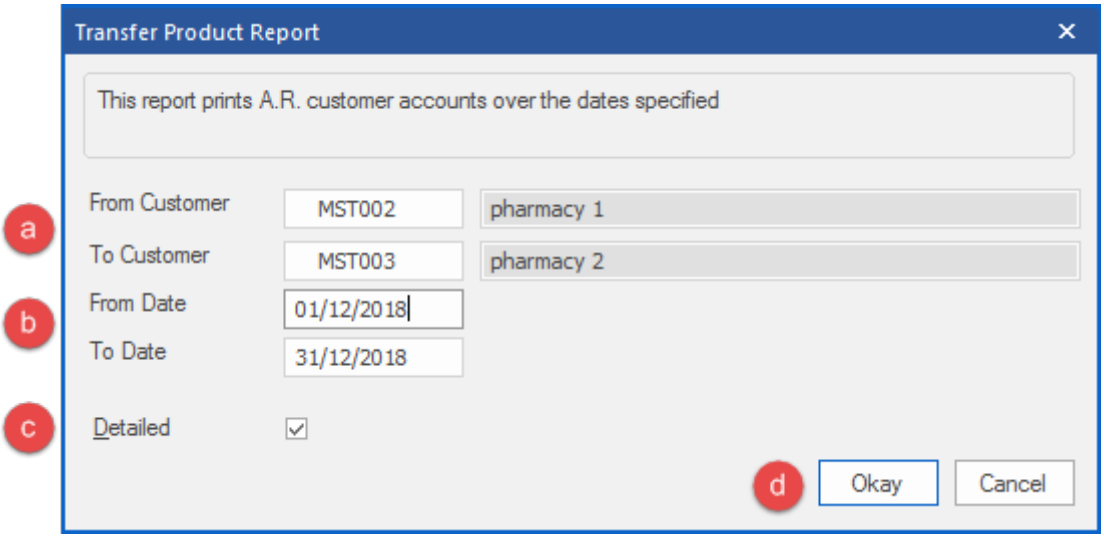
- Change from portrait to landscape orientation to accommodate more data
- Rearranging of the columns so as to be consistent with other reports

Added Columns

- Address and Phone number of the supplying store
- Product Number
- Main Barcode
- Preferred Supplier PDE

To display the **Transfer Product Report**:

1. From **Stock Manager**, click the **Transfer** menu and select **4. Transfer Product Report**.



   a. Select the customer range.
   b. Select the date range.
   c. Select the **Detailed** checkbox.
   d. Click **Okay**.

The **Transfer Product Report** is displayed.

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ARRPT011
1:30:07pm

Transfer Product Report
25/10/18 to 25/10/18

Page No. 1
Date 25/10/2018

Business : 001 - Minfos Pharmacy
Level 7 737 Bourke St Docklands
MELBOURNE 3008 VIC
Phone: 03 1234 5678
Fax: 03 1234 5678

A.R. Customer Name / Prod No	Barcode	Pref Supp PDE	Product Name	Qty	Cost	GST	Total
pharmacy1							
404814	9318766200147	588482	A/SEARCH NEBULISER BOWL 2PK	2	12.46	0.00	24.92
521688	25216882	CFB1401	BANKSIA ROSE BEAKER ASST	2	2.00	0.40	4.40
502116	9300673916112	353477	PANADOL CHILD LIQ 100ML 1-5YR S/BRY	2	9.00	1.80	19.80
488173	4902430594677	331120	VICKS V/DROP ORIG 24 X4	2	2.70	0.54	5.94
558819	25588194	88611PLN	WANT THREE EMBOSSED C/CRETE PLANTERS	3	8.60	2.58	28.38
SUB TOTAL				**11**		**5.32**	**83.44**
pharmacy2							
551018	9336830000691	BES637	D/BRANDS 12 COLOUR ESHDW BRNZE BEAUTY	1	6.05	0.61	6.66
525824	9316100000507	607452	FAULDING RMDY GLCSMNE PLUS CHOND TAB 60	3	15.11	4.53	49.86
420091	9314949260045	432806	G/CROSS CALAMINE LTN 200ML	2	3.35	0.67	7.37
418768	9310717002879	814148	MOBIC TAB 7.5MG 30	2	5.26	1.05	11.57
420826	9400562431235	501328	VASELINE IN/CARE DRY SKN PMP 750ML	4	6.04	2.42	26.58
SUB TOTAL				**12**		**9.28**	**102.04**
TOTAL				**23**		**14.60**	**185.48**

View Transfers from the Purchases window

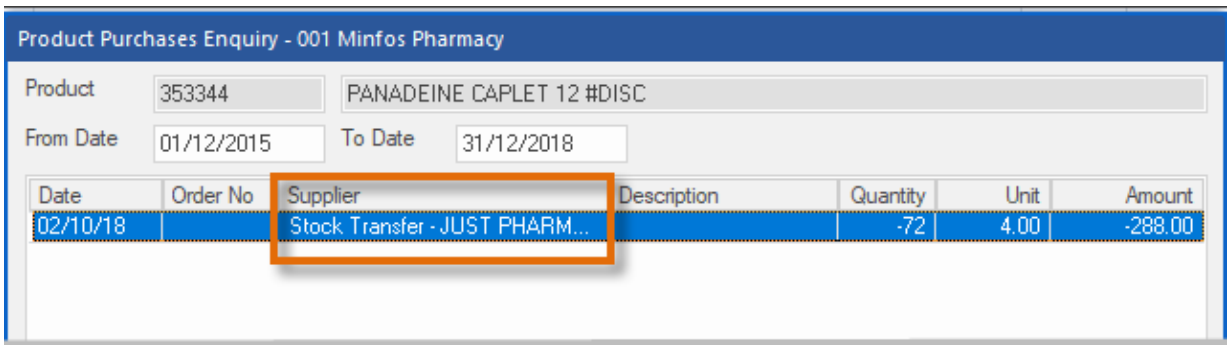
Stock Controllers will now have visibility of the recipient of a transfer when viewing from the **Purchases** window across **Stock Manager**.

Minfos will now display the name of the business against the **Stock Transfer** text, allowing the Stock Controller to identify who the stock was supplied to.

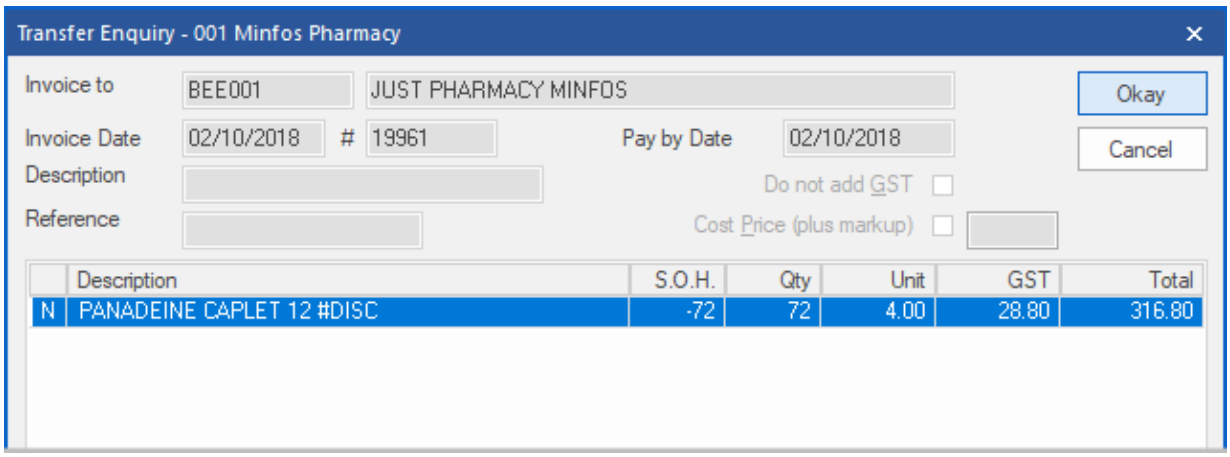
Like an order in the Purchases list, the transfer can now also be expanded allowing stock controllers to easily view all the details of the completed transfer without having to navigate to the **Transfers** window.

To view the expanded details of a transfer:

1. Create and complete a transfer or take note of a product that has recently been transferred.
2. Navigate to **Product Maintenance** and find the product.
3. Select the **Purchases** button.
   The **Product Purchases Enquiry** window is displayed.

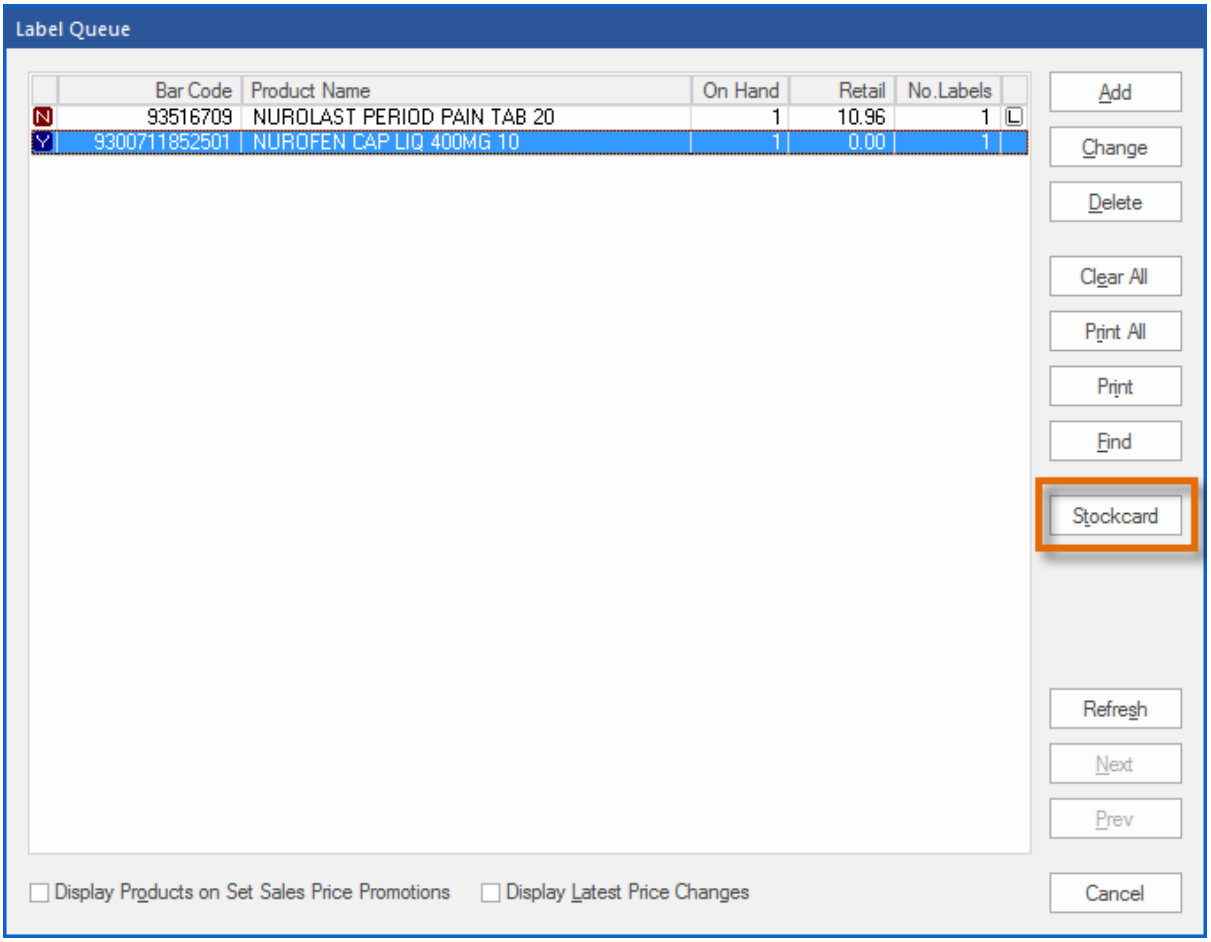


4. Double click the transfer, or click the **Enquire** button, to display the transfer details.



Access Stockcards from the Label Queue

The **Label Queue** now has a **Stockcard** button to allow quick access to product Stockcards. This enables efficient product adjustments without having to navigate away from the **Label Queue** window.



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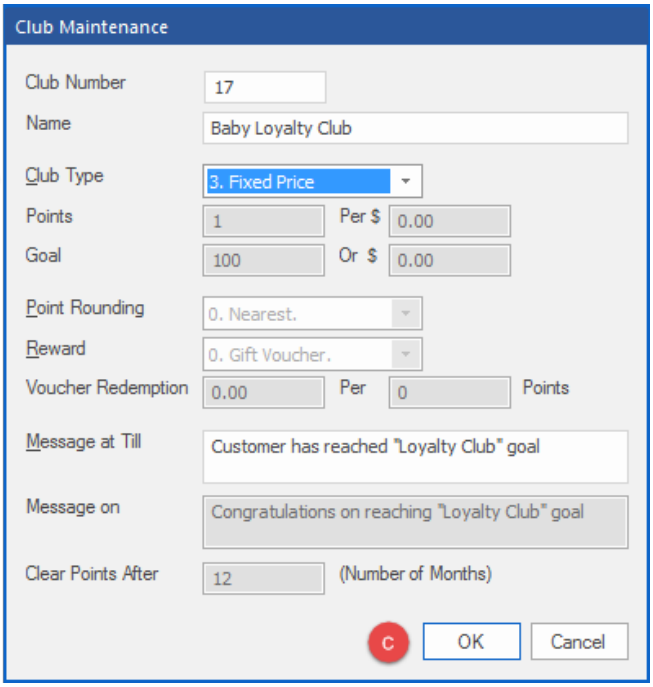
Clubs

New Fixed Price Club type

Minfos Clubs has been enhanced with a new Club type which allows for a group of products to be assigned to the club at a fixed price for the benefit of club customers.

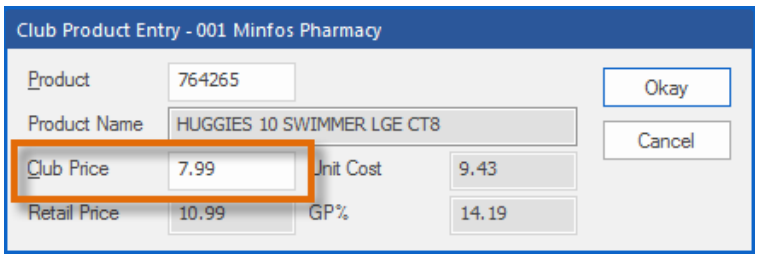
To set up a fixed price loyalty club:

1. Add a club using the normal process.
2. On the **Club Maintenance** window:



   a. Give the club a meaningful name.
   b. From the **Club Type** dropdown, select **3. Fixed Price**.
   c. Click **OK** to create the club.

3. Assign customers to the club as per the normal process.
4. Assign products to the club as per the normal process.
5. Enter the fixed price into the **Club Price** field.



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Promotions

Create an order from Promotions

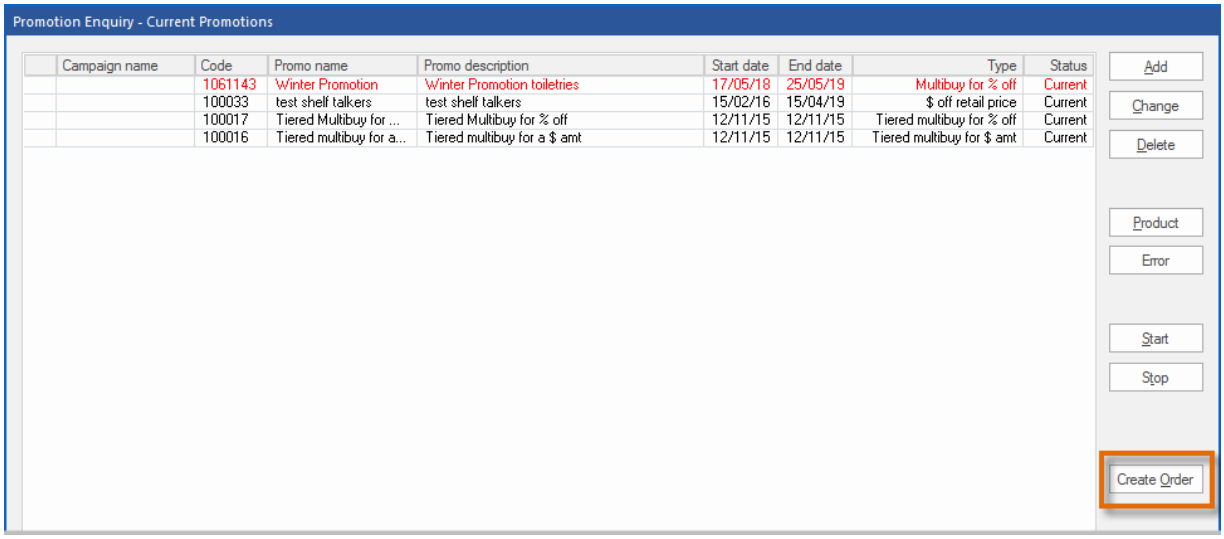
Stock Controllers and Retail Managers can now create an order from an existing promotion.

The new option creates an order containing all products within a selected promotion with a default quantity of 1 so that product quantities can be reviewed for purchase.

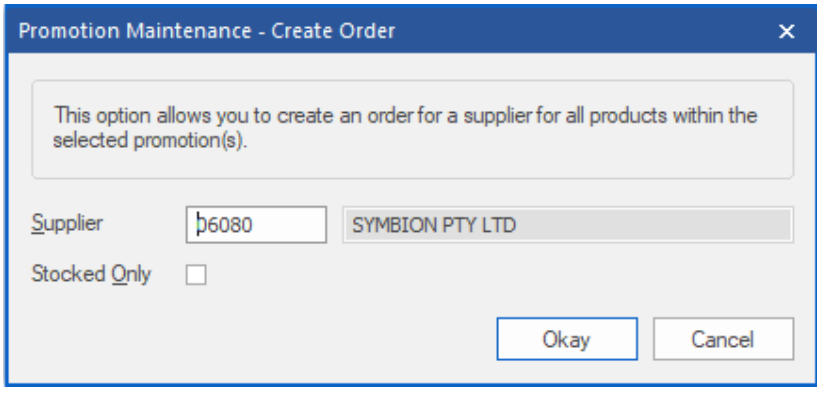
This enhancement provides an efficient way to quickly add products to an order that may be within a promotion buying period.

To create the order:

1. From the **Promotions** module, select a **New**, **Current** or **Complete** promotions list.
2. Highlight a promotion.
3. Select the **Create Order** button.



The **Promotion Maintenance – Create Order** window is displayed showing the preferred supplier. This may be changed to another.



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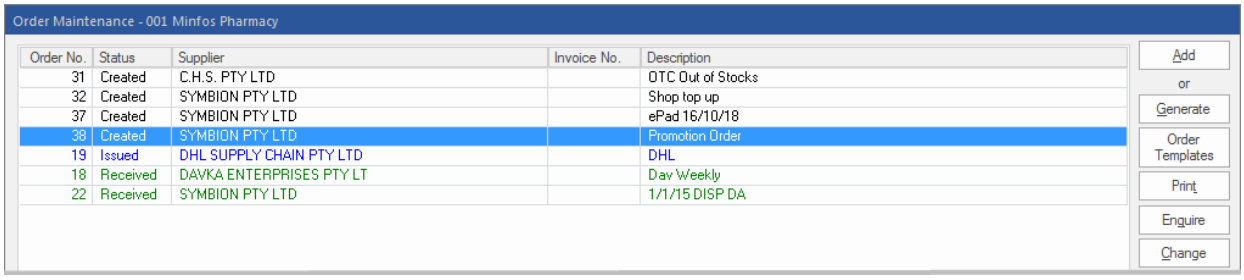
4. Select the **Stocked Only** checkbox if you only want to send products from the promotion to the order that are marked as stocked.
5. Select **Okay**.

   The order is displayed in **Order Maintenance**.



6. Select this order and review as per your regular process

> **+ Given that all products from the promotion are sent to the one order, it may be likely that some products are not supplied by the supplier you created the order for. You may need to review PDE and supplier details within the order and order appropriate products via an alternate supplier if required.**

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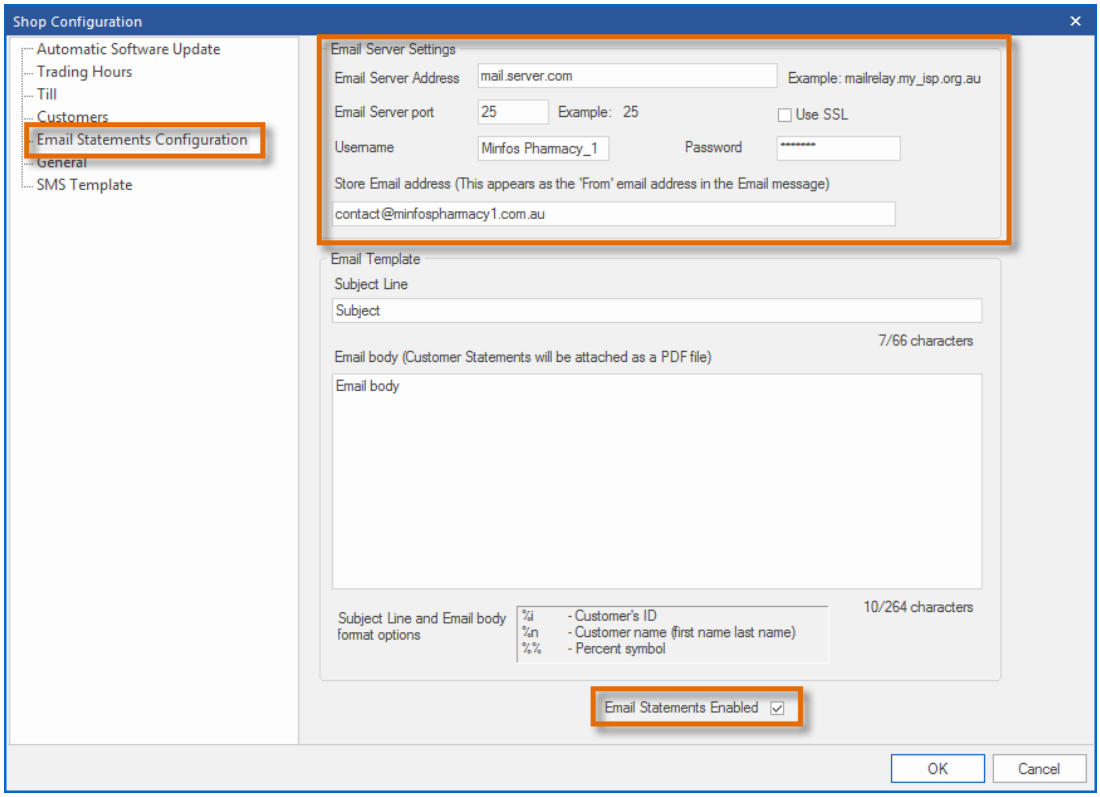
Reports

Email Reports from Minfos

You can now conveniently email reports directly from Minfos without having to navigate outside of the software.

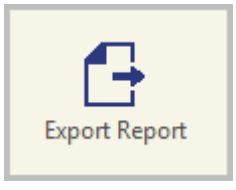
1. To use this enhancement, please ensure that email server settings in the screenshot below are properly configured in **Shop Configuration**.

   If you are already emailing customer statements, this will already be configured and the Email Reports function will be available for use.



To email a report:

1. Run any report within one of the Minfos modules, i.e. a **Class Sales Report** from the **Reporting** module
2. Close the report.
3. Within the same module click the **Export Report** icon.



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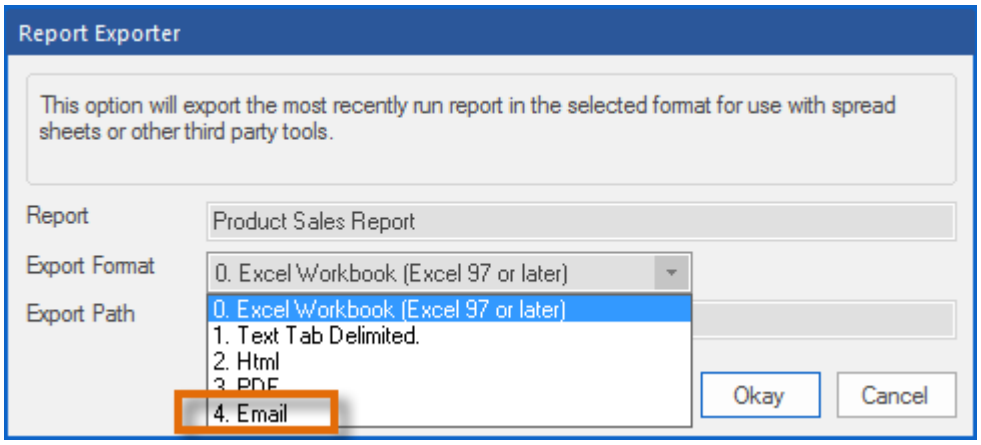
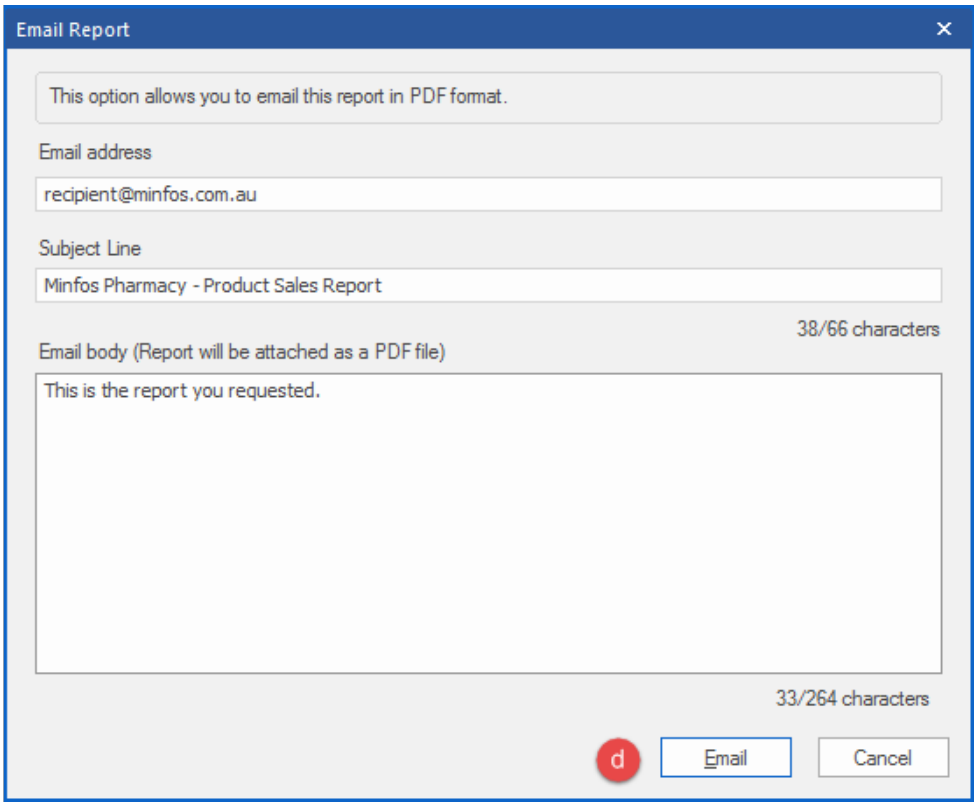
The **Report Exporter** window is displayed.

4. In the **Export Format** dropdown, select the **Email** option and click the **Okay** button.



5. The **Email Report** window is displayed.



a. Enter the recipient email address
b. By default, the subject line will contain the name of the report. This can be edited.
c. Add an email body if required.
d. Click the **Email** button to send the email.

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6. A progress message will display followed by a success or failure message.

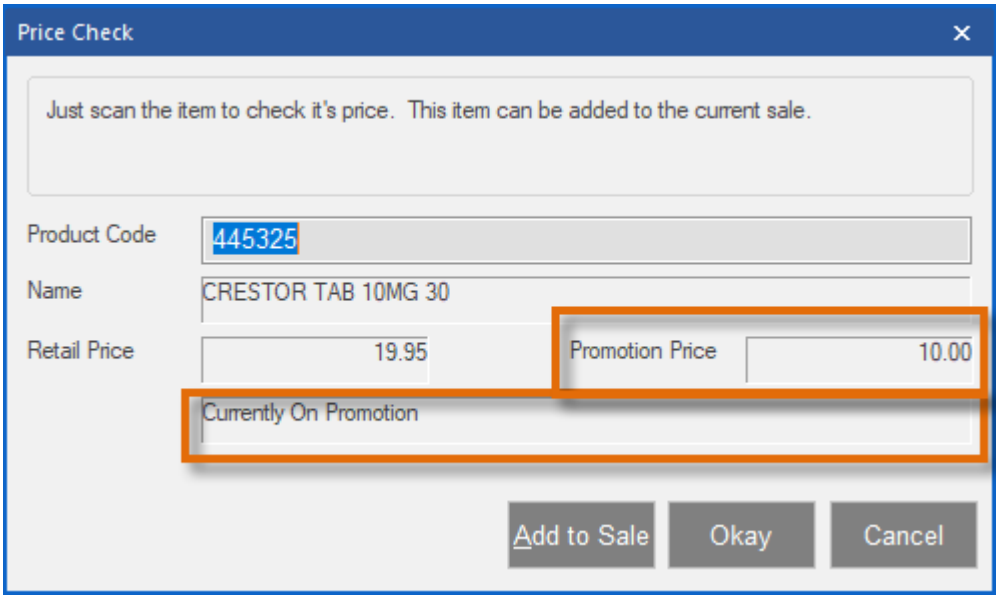
- **Reports are emailed in PDF format.**
- **Reports can be emailed to multiple recipients - use a semicolon separator as you would in Outlook for each new email address. The maximum number of recipients will be dependent on your email server.**
- **Email setup uses the same configuration as email statements, therefore no further configuration settings are required.**
- **If you require assistance to set up Email Customer Statements, contact your hardware technician. Minfos Support is not aware of your Email Server Settings and therefore cannot assist with this process.**

Till

Price check now displays if a product is on promotion

The **Price Check** window now conveniently displays if a product is on promotion. Where a product is on a set sales price type promotion, the promotion price will also be displayed, providing sales clerks with greater visibly of a product's status and current price.

If the promotion is a **Multibuy** type, this will be displayed as – **Currently On Promotion (Multibuy)** and the **Promotion Price** field will be blank.



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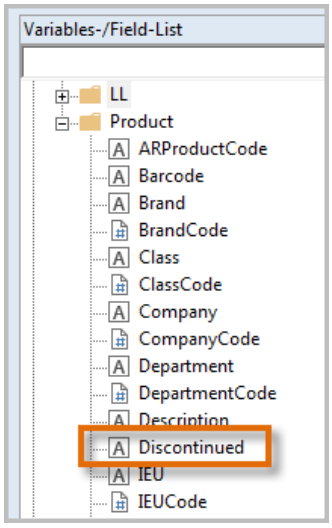
Label Maintenance

Discontinued status can now be added to label templates

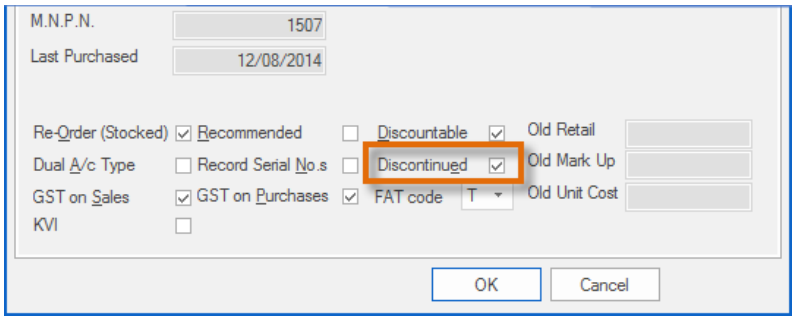
Stock controllers and Retail Managers can now apply the **Discontinued** status from the stockcard to Label Templates.

To add a **Discontinued** field to a label:

1. From the Minfos Launch Pad, click the **Special** menu and select **Utilities**.
2. Click the **Label Maintenance** icon.
3. Select a store label and click the **Edit Label** button.
4. Scroll down the **Variables** list to **Discontinued.**



5. Drag the **Discontinued** field to where you would like it displayed on the label template.
6. Save the change.
7. Navigate to **Stock Manager** and print a label for a product with the **Discontinued** checkbox selected in the Stockcard. Ensure you use the edited label template from the previous steps
8. The printed label will display 'D/C' for that product.



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Customers

Email AR customer statements

The Minfos email statements functionality has been extended to include the emailing of AR customer statements. This enhancement uses the same email settings as the current Email Customer Statements function and the new Email Reports enhancement.

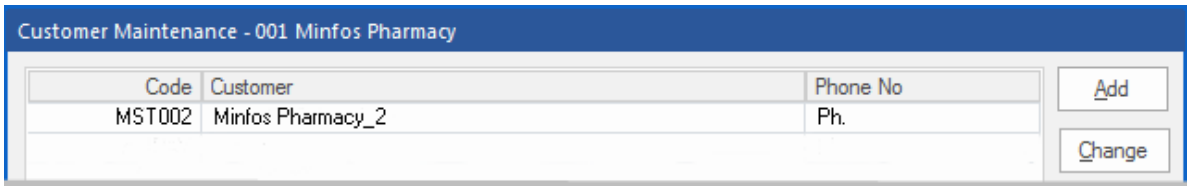
To enable emailed AR customer statements:

1. Ensure that your email server settings are properly configured in **Shop Configuration**.

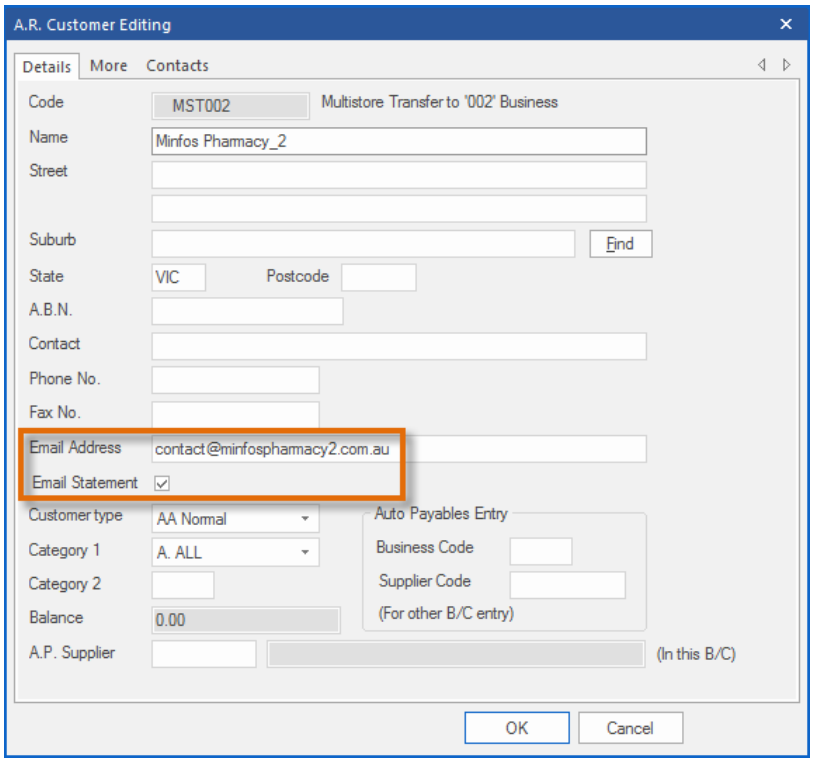
Once you have aged your AR customer accounts:

2. In the **Receivables** window, click the **Maintenance** window and select **1. Customers.**

   In the **Customer Maintenance** window, select the customer and click the **Change** button.



3. On the **A.R. Customer Editing** window ensure there is an **email address** and the **Email Statement** checkbox is selected.



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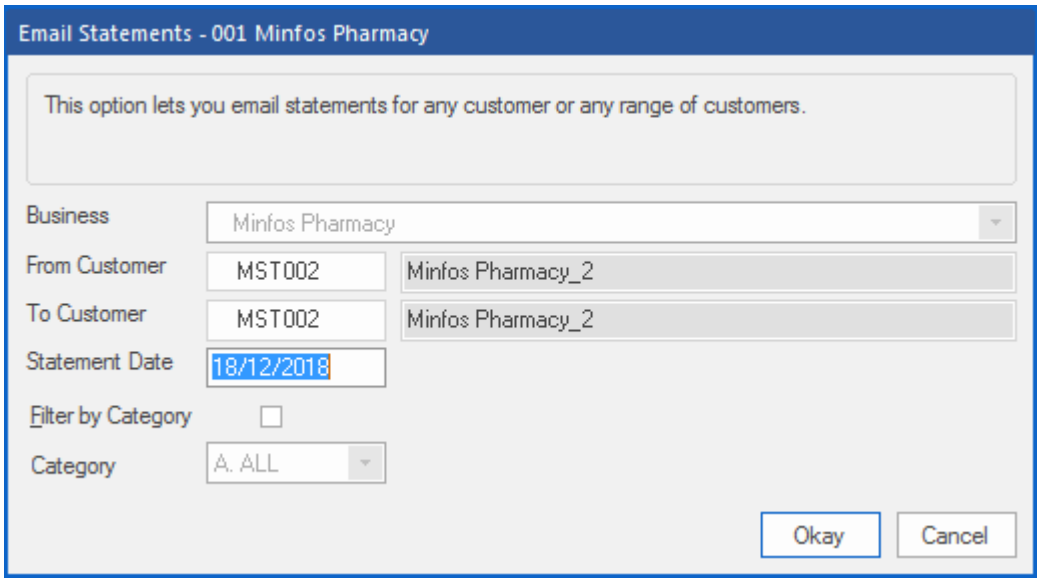
To email A.R. Statements:

Once you have aged your AR customer accounts:

1. In the **Receivables** window, click the **Reports** window and select **C. Email Statements.**
2. Select the desired customer range and click the **Okay** button to email the statement.



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Resolved Issues

Dispense

- Extemporaneous Schedule 8 items are now reported to the Department of Health and Human Services correctly.
- Minfos no longer prints a Tax Invoice automatically after charging to Third Party Packing.
- Removed Dispense Sounds from prompts that do not require an alert.
- When adding a new Prescriber, Minfos no longer reports the error of Duplicated Code and will automatically generate the Prescriber Code.
- Deleting a patient now hides the patient in the **Customer Search Window**.
- Minfos no longer prints a label when no changes are made in Script Editing mode.
- Editing a script and changing the patient no longer causes the script to be locked in Edit mode.

Till

- Loyalty points are now displayed correctly on the Till Docket after a Layby payment.
- Minfos now reprints a Layby payment correctly on the Till Docket.
- Deleted customers are now hidden in the Till **Customer Search Window**.

Stock Manager

- An MNPN update no longer resets a selected **Discontinued** checkbox in the Stockcard if the product is included in the update.
- **API Wholesaler Updates** now imports **Product Names** to the maximum limit of 40 characters.
- The Sales Journal report no longer crashes when it encounters a sale with a large discount.

Ordering

- **Usage Only** Order Generation type no longer generates based on Order Date and Order Period in Days.
- Minfos now sends the correct number of Labels to the Label Queue when the Label Type is changed.

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Reports

- The **Customer Debtors and Ageing Report** now displays correctly when a **Run Type** is selected.

Customers

- Sort by name now sorts in alphabetical order in **Club Maintenance**.

Accounting

- Layby Payment by Card now correctly updates the General Ledger accounts.
- Invoices amounting to 0.00 no longer report an error and can now be paid in Minfos Payables.

Quantum

- Quantum configuration settings no longer reset to the default value after a Software update.

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