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# **Inventory Control**

# **Creating a Prebook Purchase Order**

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Pharmacy Technology Solutions — Issued March 2025

## Inventory Control: *Creating a Prebook Purchase Order*

- *Prebook purchase orders allow you to order a predefined list of promotional event items many months in advance.*
- *These items must be ordered by a certain date to get the promotional cost and will be shipped just prior to the event.*
- *The quantity of suggested items can be modified to meet your requirements.*

1. Click the **Inventory Control** icon.
- *The function buttons that appear are related to **Inventory Control** in the Application bar above.*
2. Click the **Purchase Order** function button.



# Inventory Control: Creating a Prebook Purchase Order (cont'd)

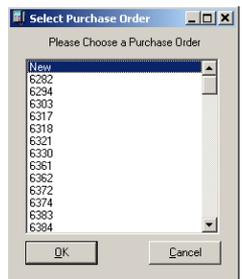
- 3. Type the **Vendor** code.
  - This is the code that is assigned to this vendor for ordering purposes (e.g., MED for McKesson).



Clicking the Look-up button  will display a list of VENDOR codes.



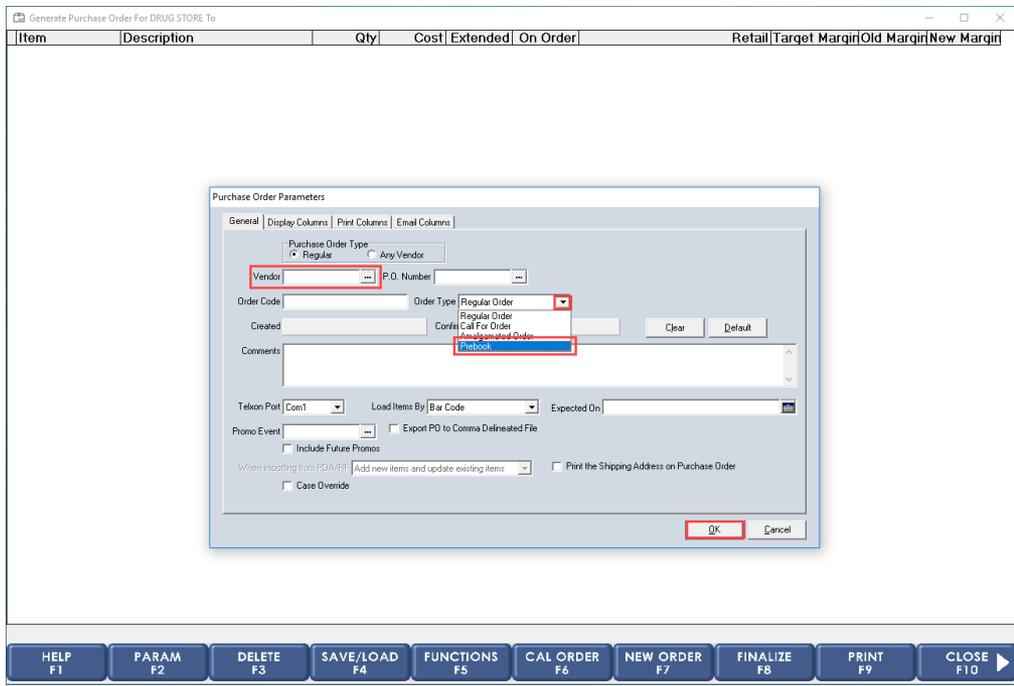
If this is not the first time you are creating a Purchase Order for this vendor, the SELECT PURCHASE ORDER window will appear. Ensure that **New** is highlighted and then click QK to continue.



- 4. Click the **Order Type** drop-down button  to select **Prebook**.



If you do not choose Prebook, items will be shipped to you the next day at the regular price.



## Inventory Control: Creating a Prebook Purchase Order (cont'd)

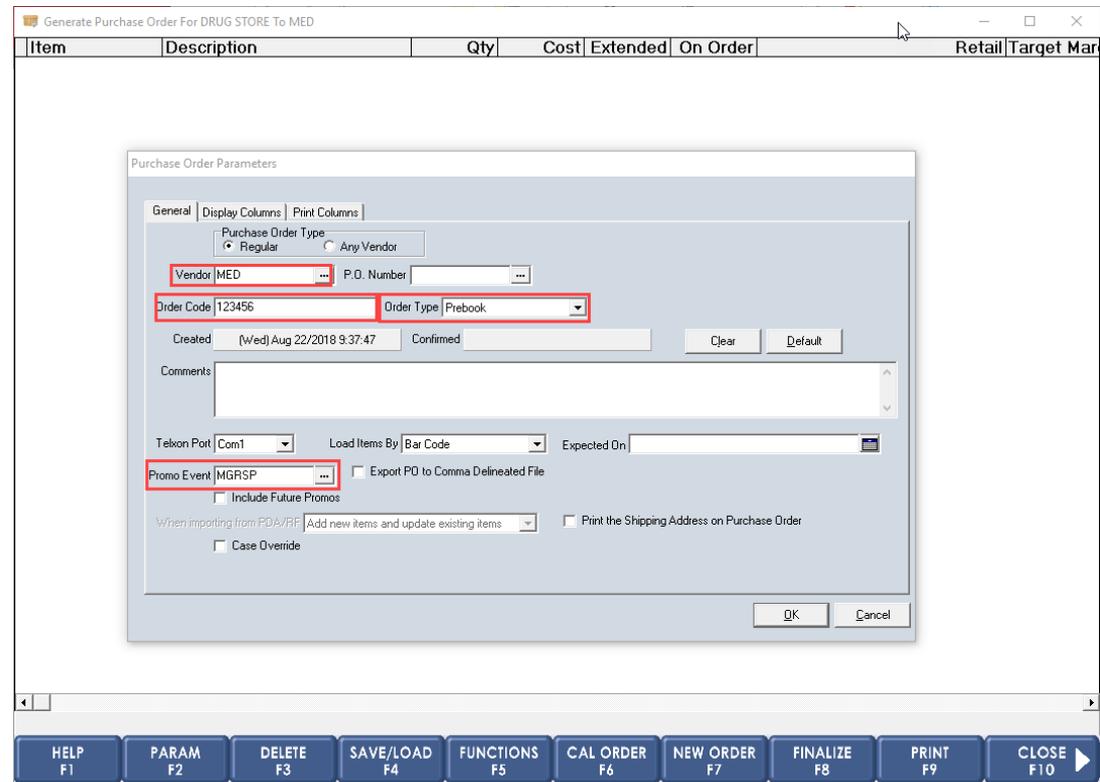
### 5. Type the **Order Code**.

- This is the Promotion number on the Sales Order form.

 The **Comments** field can be used to type any information you feel is pertinent to this order (e.g., the date the prebook should be delivered).

### 6. Click the **Look-up** button in the **Promo Event** field.

- This will allow you to choose the promo event that you are ordering products for.
- You may also choose to leave this field blank and manually enter the items you would like to order.



Generate Purchase Order For DRUG STORE To MED

Item	Description	Qty	Cost	Extended	On Order	Retail	Target Mar
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Purchase Order Parameters

General | Display Columns | Print Columns

Purchase Order Type  
 Regular  Any Vendor

Vendor: MED P.O. Number: [ ]

Order Code: 123456 Order Type: Prebook

Created: (Wed) Aug 22/2018 9:37:47 Confirmed: [ ] Clear Default

Comments: [ ]

Telxon Port: Com1 Load Items By: Bar Code Expected On: [ ]

Promo Event: MGRSP  Export PO to Comma Delineated File

Include Future Promos

When importing from FDA/RF: Add new items and update existing items  Print the Shipping Address on Purchase Order

Case Override

OK Cancel

HELP F1 PARAM F2 DELETE F3 SAVE/LOAD F4 FUNCTIONS F5 CAL ORDER F6 NEW ORDER F7 FINALIZE F8 PRINT F9 CLOSE F10

# Inventory Control: Creating a Prebook Purchase Order (cont'd)

All of the currently active promos will be displayed here.

- 7. Click the **Promo Event**.
  - You can also use the up/down arrow keys on your keyboard to scroll through the list.
  - Your selection is highlighted blue.
- 8. Click the **OK** button.

Code	Description	Start Date	End Date
01645	ALLERGY SUNCARE 2010	02/02/2011 10:56:43	02/04/2011 00:00:01
04797	GDN FLYER NOVEMBER 19-25 201	11/19/2010 00:00:01	11/26/2010 00:00:01
04812	GDN FLYER NOV.26-DEC.02 2010	11/26/2010 00:00:01	12/03/2010 00:00:01
04827	GDN FLYER DECEMBER 03-09 201	12/03/2010 00:00:01	12/10/2010 00:00:01
04842	GDN FLYER DEC.10-16 2010	12/10/2010 00:00:01	12/17/2010 00:00:01
04857	GDN FLYER DEC.17-30 2010	12/17/2010 00:00:01	12/31/2010 00:00:01
04878	GDN FLYER DEC.31 2010-JAN.13	12/31/2010 00:00:01	01/14/2011 00:00:01
89640	OPTIONAL XMAS AD #1 NOV.12-18	11/12/2010 00:00:01	11/19/2010 00:00:01
89740	OPTIONAL XMAS AD #2 NOV.26-DEC	11/26/2010 00:00:01	12/03/2010 00:00:01
DIS	DISCOUNT	09/01/2010 14:55:12	09/30/2011 14:55:14

Code: 04842  
Description: GDN FLYER DEC.10-16 2010  
Start: (Fri) Dec 10/2010 0:00:01  
End: (Fri) Dec 17/2010 0:00:01  
Price Matrix: ...  
Threshold Amt: 0.00  
Default Discount %: 0.00  
 Rebate Promo  
 Active Promos Only  
OK Cancel

- 9. Click the **Yes** button.
  - When you select Yes, all the items in the promo will automatically populate in your purchase order.

Information  
Do you want to load all items from the promo?  
Yes No

# Inventory Control: Creating a Prebook Purchase Order (cont'd)

- All the items of the promo are automatically populated in your purchase order with zero quantity.
- Customize the quantity of each promo item for your pharmacy.

10. Press the **F12** button on your keyboard.

- The **F12** button does not display in the Function Bar.

Item	Description	Qty	Cost	Extended	On Order	Retail	Target
77105805135	REX BLU PURSE FOUNDATI	0	1,510	0.000	3		
77105805137	REX BLU PURSE POWDER BR 3 1UN	0	3,540	0.000	4		
77105805142	REX BLU RETRACTABLE BLUSH 1UN	0	2,140	0.000	3		
77105805145	REX BLU RETRACTABLE KABUK 1UN	0	4,510	0.000	3		
77105805133	REX BLU RETRACTABLE LIP B 1UN	0	1,270	0.000	3		
77105805144	REX BLU RETRACTABLE POWDE 1UN	0	3,150	0.000	3		
77105805130	REX BLU SMOKEY E/S BR 21 1UN	0	1,190	0.000	0		
77105805134	REX BLU SMUDGE DEFINER BR 1UN	0	1,220	0.000	3		
77105805138	REX BLU STANDUP POWDER BR 1UN	0	3,540	0.000	3		
77105805143	REX BLU 5 PC MINI BR KIT 5PK	0	6,710	0.000	3		
02270012683	CG LIQUILINE BLAST 460 GR 1UN	0	6,050	0.000	0		
02270012681	CG LIQUILINE BLAST 440 VI 1UN	0	6,050	0.000	0		
02270012134	COVER GIRL LASHBLAST LENGTH MASCARA 8	0	6,050	0.000	0		
02270012135	COVER GIRL LASHBLAST LENGTH MASCARA 8	0	6,050	0.000	0		
02270012137	COVER GIRL LASHBLAST LENGTH MASCARA 8	0	6,050	0.000	0		
02270012133	COVER GIRL LASHBLAST LENGTH MASCARA 8	0	6,050	0.000	0		
02270012139	COVER GIRL LASHBLAST LENGTH MASCARA V	0	6,050	0.000	0		
02270012140	COVER GIRL LASHBLAST LENGTH MASC WTR	0	6,050	0.000	0		
02270012138	COVER GIRL LASHBLAST LENGTH MASC WTR	0	6,050	0.000	0		
02270012704	CG LASHBLAST FUSION 860 V 1UN	0	6,050	0.000	0		
02270012705	CG LASHBLAST FUSION 865 B 1UN	0	6,050	0.000	0		
02270012706	CG LASHBLAST FUSION 870 B 1UN	0	6,050	0.000	0		
02270012708	CG LASHBLAST FUSION 880 B 1UN	0	6,050	0.000	0		

HELP  
F1
PARAM  
F2
DELETE  
F3
SAVE/LOAD  
F4
FUNCTIONS  
F5
CAL ORDER  
F6
NEW ORDER  
F7
FINALIZE  
F8
PRINT  
F9
CLOSE  
F10

NEGOTIATE  
F1
TOTALS  
F2
SUBSTITUTE  
F3
QUERY  
F4
FIND  
F5
EDIT  
F6
IMPORT  
F7
EXPORT  
F8
SORT  
F9
CLOSE  
F10

11. Click the **Negotiate F1** button.



You can also use the **F1** key on your keyboard to activate the function.



# Inventory Control: Creating a Prebook Purchase Order (cont'd)

- In this window, you can make modifications to the quantity or product.
- This window shows the vendor, promotional information, sales history, and pending orders for all items.

- Select the **item**.
  - Use the Up/Down arrow keys on your keyboard to scroll through the list.
  - The selected item is highlighted blue.
  - Details of the selected item display in the **Vendor Information** section.

- Type the **Order Qty**.
  - Press the **TAB** key to accept the change.
  - The change will be reflected in the Qty column, and the Extended value re-calculates based on the new quantity.

15. Continue **adjusting** the quantity of each item.

16. Click the **Close** button.

**Negotiation Details**

Item	Description	Qty	Cost	Extended	On Order	Retail	Target Margin	Old Margin	New Margin
00810000432	COVERGIRL OUTLAST STAY FAE	1	8.070	8.070	0	#1 - 13.99	0.00	42.32%	42.3
00810000451	COVERGIRL OUTLAST STAY FAE	1	8.070	8.070	0	#1 - 13.99	0.00	42.32%	42.3
00810000452	COVERGIRL OUTLAST STAY FAE	1	8.070	8.070	0	#1 - 13.99	0.00	42.32%	42.3
00810000455	COVERGIRL OUTLAST STAY FAE	1	8.070	8.070	0	#1 - 13.99	0.00	42.32%	42.3
00810000458	COVERGIRL OUTLAST STAY FAE	1	8.070	8.070	0	#1 - 13.99	0.00	42.32%	42.3
00810000636	COVERGIRL/OLAY TONE REHAB	1	10.980	10.980	0	#1 - 18.99	0.00	42.18%	42.1
00810000637	COVERGIRL/OLAY TONE REHAB	1	10.980	10.980	0	#1 - 18.99	0.00	42.18%	42.1

Vendor, Promo & Purchase Hist Information | Pending Orders

Retail Price: #1 - 18.99    On Hand: 0    On Order: 0

Order Qty: 1    Minimum On Hand Qty: 0    Cost: 10.980    Maximum On Hand Qty: 0

Vendor Information

Vendor	Reg. Cost	Last Cost	Deal Cost	PA
MED	10.980	0.000	0.000	0.000

Vendor Type: Preferred Vendor    Min Order Qty: 0    Expiry:

Promo Information

Promo Code:    Promo Price:    Start Date:

Price Method:    Promo Retail: 0.00    Break Qty: 0    Special Price: 0.00

Cost: 0.000    Margin:    Mix 'n Match:    View Purchases

Sales History

Number of Months History To Load: 6 Months    Combine Regular and Promo Sales:    Include Promo Sales History:    Include All Equivalent:    Display Sales History By: Month    Week    Day

Date	Event	Qty	Sales	Avg Sales	Cost	Promo Cost	Avg Cost	Profit	Margin
Total		0	0.00	0.00	0.000	0.000	0.000	0.00	0.00

Close

# Inventory Control: Creating a Prebook Purchase Order (cont'd)

17. Press the **F12** button on your keyboard.
- The **F12** button does not display in the Function Bar.

Item	Description	Qty	Cost	Extended	On Order	Retail	Target
77105805135	REX BLU PURSE FOUNDATION 1UN	6	1,510	9,060	3		
77105805137	REX BLU PURSE POWDER BR 3 1UN	6	3,540	21,240	4		
77105805142	REX BLU RETRACTABLE BLUSH 1UN	6	2,140	12,840	3		
77105805145	REX BLU RETRACTABLE KABUK 1UN	3	4,510	13,530	3		
77105805133	REX BLU RETRACTABLE LIP B 1UN	3	1,270	3,810	3		
77105805144	REX BLU RETRACTABLE POWDE 1UN	3	3,150	9,450	3		
77105805130	REX BLU SMOKEY E/S BR 21 1UN	4	1,190	4,760	0		
77105805134	REX BLU SMUDGE DEFINER BR 1UN	4	1,220	4,880	3		
77105805138	REX BLU STANDUP POWDER BR 1UN	4	3,540	14,160	3		
77105805143	REX BLU 5 PC MINI BR KIT SPK	4	6,710	26,840	3		
02270012683	CG LIQUILINE BLAST 460 GR 1UN	6	6,050	36,300	0		
02270012681	CG LIQUILINE BLAST 440 VI 1UN	6	6,050	36,300	0		
02270012134	COVER GIRL LASHBLAST LENGTH MASCARA 8	2	6,050	12,100	0		
02270012135	COVER GIRL LASHBLAST LENGTH MASCARA 8	2	6,050	12,100	0		
02270012137	COVER GIRL LASHBLAST LENGTH MASCARA 8	2	6,050	12,100	0		
02270012133	COVER GIRL LASHBLAST LENGTH MASCARA 8	2	6,050	12,100	0		
02270012139	COVER GIRL LASHBLAST LENGTH MASCARA V	2	6,050	12,100	0		
02270012140	COVER GIRL LASHBLAST LENGTH MASC WTRF	2	6,050	12,100	0		
02270012138	COVER GIRL LASHBLAST LENGTH MASC WTRF	2	6,050	12,100	0		
02270012704	CG LASHBLAST FUSION 860 V 1UN	3	6,050	18,150	0		
02270012705	CG LASHBLAST FUSION 865 B 1UN	3	6,050	18,150	0		
02270012706	CG LASHBLAST FUSION 870 B 1UN	3	6,050	18,150	0		
02270012708	CG LASHBLAST FUSION 880	3	6,050	18,150	0		

NEGOTIATE  
F1

TOTALS  
F2

SUBSTITUTE  
F3

QUERY  
F4

FIND  
F5

EDIT  
F6

IMPORT  
F7

EXPORT  
F8

SORT  
F9

CLOSE  
F10

HELP  
F1

PARAM  
F2

DELETE  
F3

SAVE/LOAD  
F4

FUNCTIONS  
F5

CAL ORDER  
F6

NEW ORDER  
F7

FINALIZE  
F8

PRINT  
F9

CLOSE  
F10

18. Click the **Finalize F8** button.
- You can also use the **F8** key on your keyboard to activate the function.*

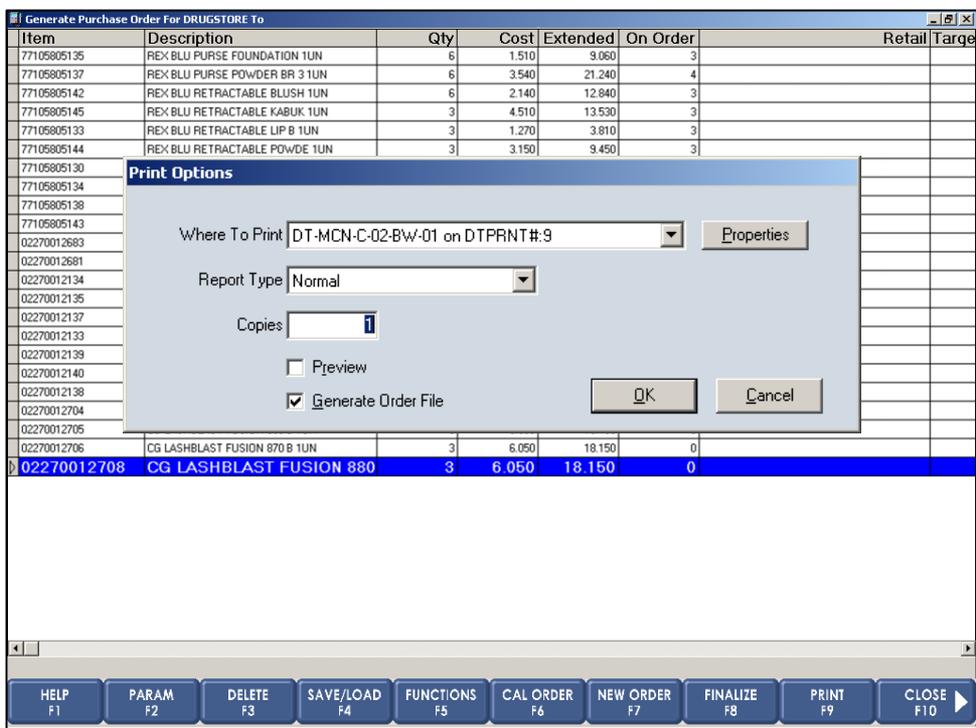


- i** If the Warning window appears, you should make changes to the Purchase Order based on the warning:
- Click on **Adjust Order** Item to accept the changes.
  - Click on **Proceed** to ignore the warnings.

# Inventory Control: Creating a Prebook Purchase Order (cont'd)

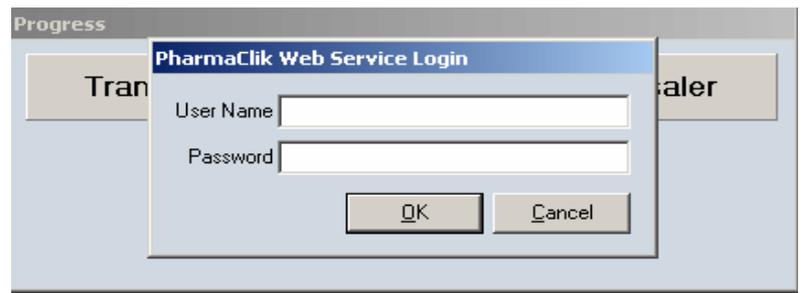
- 19. Click to check the **Generate Order File** box.
  - This will prompt Propel POS to create a record of the prebook purchase order we will be using to send to McKesson through PharmaClik.

20. Click the **OK** button.



- 21. Type you **PharmaClik Web Service User Name and Password**.
  - This is your login in for the PharmaClik Ordering website.

22. Click the **OK** button.



# Inventory Control: Creating a Prebook Purchase Order (cont'd)

- 23. Click the **OK** button.
- The information box appears stating the Purchase order was sent successfully.



*If the information window appears, and the order was not successfully sent go to page 15 to see additional steps.*

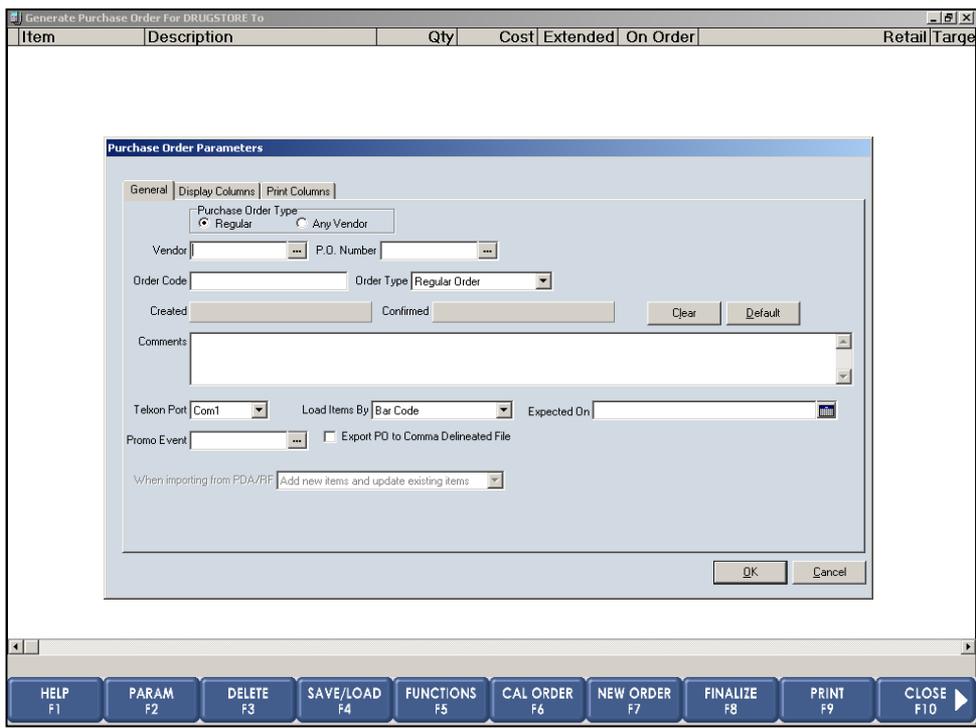


- 24. Click the **Cancel** button.

- 25. Click the **Close F10** button.

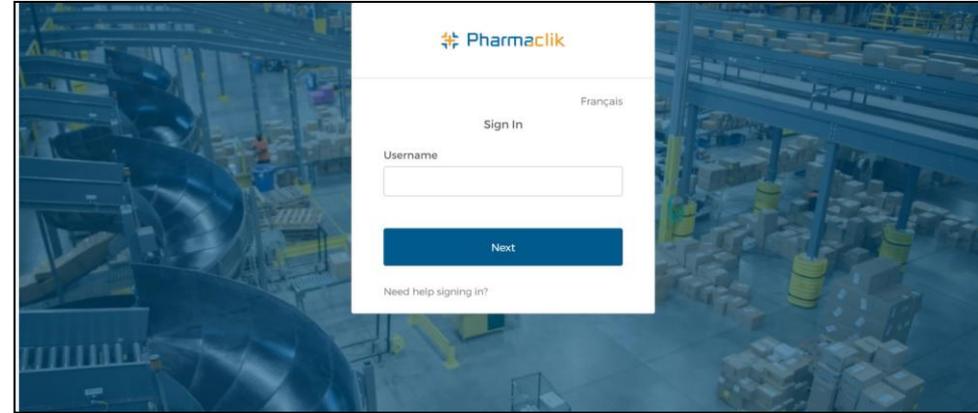


*You can also use the **F10** key on your keyboard to activate the function.*

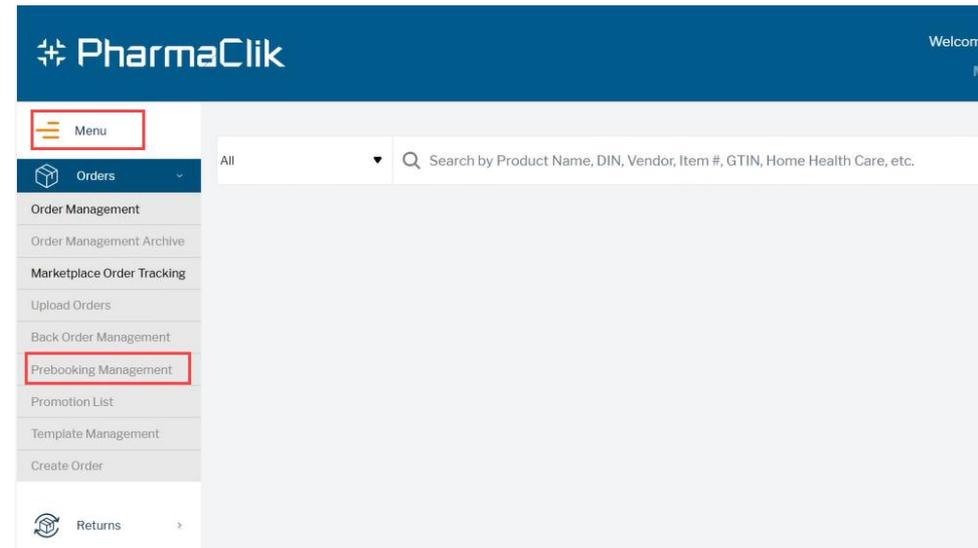


## Inventory Control: Sending a Prebook Purchase Order to PharmaClik (cont'd)

- Once you have created and finalized the order in the Purchase Order function, sign into PharmaClik Ordering and send your order
26. Sign into PharmaClik using your **Username** and Password.  
*This is the **Username/Password** you created on PharmaClik; it is not your Propel POS User Code.*



27. Click the **Orders** icon in the **Side Main Menu** bar.
28. Click the **Prebooking Management** option.
- This will take you to the prebooking section in PharmaClik.*



# Inventory Control: Sending a Prebook Purchase Order to PharmaClik (cont'd)

- Click the **Magnifying glass** to verify the order.
  - Your will see your purchase order number in the P.O.# column.

The screenshot shows the PharmaClik Order Management interface. A table lists transactions with columns for Transaction #, P.O. #, Created By, Modified by, Transaction Date, # Lines, Total (\$), and Status. The transaction with Transaction # 72125579 and P.O. # P123 is highlighted with a red box. A magnifying glass icon is visible next to this row.

Transaction #	P.O. #	Created By	Modified by	Transaction Date	# Lines	Total (\$)	Status
72117367				2016-11-27 15:13	59	472.57	Confirmed
72125579	P123			2016-11-28 10:13	0		Closed
72118009				2016-11-27 15:45	11	412.78	Closed
72117788				2016-11-27 15:28	17	560.95	Closed
72109560	RX00000066			2016-11-26 15:32	1	7.28	Closed
72109550	RX00000065			2016-11-26 15:31	3	122.43	Closed
72106671	etc			2016-11-26 15:32	3	33.76	Closed
72087005	etc			2016-11-25 10:56	1	23.22	Closed
72078079	1			2016-11-24 19:28	1	3.54	Closed
72074124	RX00000064			2016-11-24 18:00	1	22.40	Closed
72074070				2016-11-24 17:57	1	14.90	Closed
72073770	RX00000061			2016-11-24 17:53	5	217.37	Closed
72067687				2016-11-24 15:35	1	7.44	Closed
72044431	RX00000058			2016-11-23 17:45	7	271.53	Closed

- Click the **Checkout** option.
  - Verify that the order is correct.

The screenshot shows the PharmaClik Order Details interface for transaction # 72125579. The status is 'Open'. The 'Checkout' button is highlighted with a red box. The order details include Account # 496117, Transaction Date 2016-11-28 10:12, and Div. Code. The item list shows 116509 TYLENOL ARTHRITIS PAIN 650MG CPLT 24 with a price of 2238885.

Item #	Description	DIN/NPN	Price (\$)	C/A	Tax	Qty Ord	MSQ	Ext. price(\$)	Qty Res	Qty B/O	Shipping Date
116509	TYLENOL ARTHRITIS PAIN 650MG CPLT 24	2238885				1	U	1			

# Inventory Control: Sending a Prebook Purchase Order to PharmaClik (cont'd)

- 33. Click the **Continue Checkout** option.
- Review any warnings if indicated below.



Notice the **Status** of the order has been changed to **Confirmed**.



You may see a message stating that some products could not be applied to the order. There are items that the MSQ was not met. Look through the order and make corrections.

The data has been applied : 69 product(s) affected successfully, 12 invalid product(s) data not applied.  
 Products that could not be applied are : [190429, 43406, 145576, 141355, 22550, 414847, 22295, 22545, 30777, 150558, 121789, 158088]

Transaction #	P.O. #	Created By	Modified by	Transaction Date	# Lines	Total (\$)	Status
72125579	P123			2016-11-28 10:13	1	3.99	Confirmed
72117367				2016-11-27 15:13	59	472.57	Confirmed
72118009				2016-11-27 15:45	11	412.78	Closed
72117788				2016-11-27 15:28	17	560.95	Closed
72109560	RX00000066			2016-11-26 15:32	1	7.28	Closed
72109550	RX00000065			2016-11-26 15:31	3	122.43	Closed
72106671				2016-11-26 15:32	3	33.76	Closed
72087005				2016-11-25 10:56	1	23.22	Closed
72078079				2016-11-24 19:28	1	3.54	Closed
72074124	RX00000064			2016-11-24 18:00	1	22.40	Closed
72074070				2016-11-24 17:57	1	14.90	Closed
72073770	RX00000061			2016-11-24 17:53	5	217.37	Closed

## Inventory Control: Sending a Prebook Purchase Order to PharmaClik (cont'd)

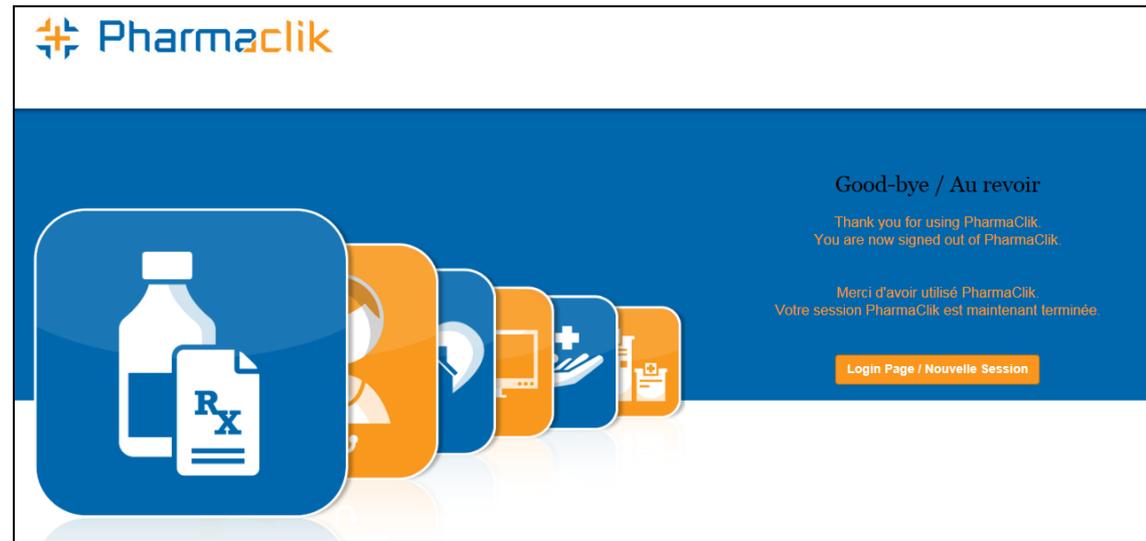
34. Click the  Power button.
35. Click the Logoff option.
  - *This will close the screen.*



36. Click the **OK** button.
  - *This will logoff PharmaClik.*



*You are now signed out of PharmaClik.*



## Inventory Control: Check Order Status

- *In the rare case an order should fail to transmit from the Purchase Order application and an error message appeared on the screen. This occurs due to issues like network connectivity going down or the web service is unavailable.*
- *The Wholesaler Catalogue Manger will show you all Unsent Purchase Orders and Transmitted Purchase Orders waiting for confirmation.*
- *You may also resend any Unsent Purchase Orders from the Wholesaler Catalogue Manager.*

1. Click the **Utilities** icon.
2. Click the **Wholesaler Catalogue Manager** function button.



# Inventory Control: Check Order Status

1. Click the **Send POs** button.
  - *The Unsent Purchase Orders section will list all purchase orders that were not sent to the PharmaClik Ordering website.*



*You can also click View PO button to see what items are in the Purchase Order.*

P.O. #	Created	Comments
184	(Tue) Feb 8/2022 15:18:15	

Transmitted Date	P.O. #	Created	Comments
(Wed) Dec 8/2021 13:06:04	128	(Tue) Dec 7/2021 10:37:12	TEST ORDER
(Wed) Dec 8/2021 13:07:01	129	(Wed) Dec 8/2021 13:06:37	
(Wed) Dec 8/2021 13:21:45	131	(Wed) Dec 8/2021 13:21:15	
(Tue) Jan 25/2022 10:07:24	130	(Wed) Dec 8/2021 13:11:43	
(Tue) Jan 25/2022 10:07:25	158	(Tue) Jan 25/2022 09:44:02	
(Tue) Jan 25/2022 10:15:20	159	(Tue) Jan 25/2022 10:15:11	
(Wed) Jan 26/2022 13:07:30	163	(Wed) Jan 26/2022 13:07:12	
(Wed) Jan 26/2022 13:21:16	164	(Wed) Jan 26/2022 13:20:54	

2. Type your **PharmaClik Web Service Username and Password.**
  - *This is your password for the PharmaClik Ordering website.*
3. Click the **OK** button.

PharmaClik Web Service Login

User Name

Password

OK Cancel

# Inventory Control: Check Order Status

The screenshot shows the 'Wholesaler Catalog Manager' application window. At the top, there is a 'Wholesaler' dropdown menu set to 'PharmaClik' and a 'Refresh' button. Below this are tabs for 'Purchase Orders', 'Invoices', and 'Catalogue'. The main area is divided into two sections: 'Unsent Purchase Orders' and 'Transmitted Purchase Orders Waiting for Confirmation'. The 'Unsent Purchase Orders' section contains a table with one row: P.O. # 184, Created (Tue) Feb 8/2022 15:18:15, and an empty Comments field. The 'Transmitted Purchase Orders Waiting for Confirmation' section is highlighted with a red border and contains a table with 8 rows. The first row has Transmitted Date (Wed) Dec 8/2021 13:06:04, P.O. # 128, Created (Tue) Dec 7/2021 10:37:12, and Comments TEST ORDER. The other rows have empty Comments fields. At the bottom, there are navigation buttons (First, Prev, Next, Last), 'View PO', 'Audit Trail', 'Send POs', and 'Check For Invoices', along with search fields for 'P.O. #' and 'Search Text'. A 'Help (F1)' button is at the bottom left, and 'Parameters' and 'Close' buttons are at the bottom right.

P.O. #	Created	Comments
184	(Tue) Feb 8/2022 15:18:15	

Transmitted Date	P.O. #	Created	Comments
(Wed) Dec 8/2021 13:06:04	128	(Tue) Dec 7/2021 10:37:12	TEST ORDER
(Wed) Dec 8/2021 13:07:01	129	(Wed) Dec 8/2021 13:06:37	
(Wed) Dec 8/2021 13:21:45	131	(Wed) Dec 8/2021 13:21:15	
(Tue) Jan 25/2022 10:07:24	130	(Wed) Dec 8/2021 13:11:43	
(Tue) Jan 25/2022 10:07:25	158	(Tue) Jan 25/2022 09:44:02	
(Tue) Jan 25/2022 10:15:20	159	(Tue) Jan 25/2022 10:15:11	
(Wed) Jan 26/2022 13:07:30	163	(Wed) Jan 26/2022 13:07:12	
(Wed) Jan 26/2022 13:21:16	164	(Wed) Jan 26/2022 13:20:54	

- *If the order was sent it will be moved to the Transmitted Purchase Orders Waiting for Confirmation section.*
- *It will also show you the Transmitted date and time.*