

The following checklist is an overview of the one-time activities when starting perpetual inventory.

Create a Game Plan



- Appoint an Inventory Ambassador as your go-to person.
- Create a plan. Assign specific sections or inventory tasks to team members.

Set Your Pricing & Cost Update Preferences



- Set your [Minimum Gross Profit per Rx](#) and turn ON [Prompt for Low Gross Profit](#) in **More (...)** > **Pricing** > **Strategies** tab.
- Set your [Acquisition and Supplier Cost Update](#) preferences in **More (...)** > **Inventory** > **Order Pad** > **Supplier**.
- In **More (...)** > **Pricing**, set the [Cost Method](#) for Cash and private Third Party plans to use Supplier Pricing first (i.e., SUP/ACQ/ELI or SUP/ELI/ACQ).



Supplier Prices for centrally maintained pack sizes are updated by PTS. Acquisition Costs must be manually updated by pharmacies in between purchase orders.

Set Your Purchase Order Send Preferences



- Set your [Purchase Order Send](#) preferences in **More (...)** > **Pharmacy** > **Inventory**.
- Ensure the **Auto-Reconcile Exceptions report** is set to print to the correct printer in **More (...)** > **Pharmacy** > **System**.

Process Outstanding Owe Balances and Set Preferences



- [Process](#) all outstanding Owe Balances (leverage the **Owe Balance report** and [Clear Owe Balances](#) function if needed).
- Set your [Owe Balance preferences](#) in **More (...)** > **Pharmacy** > **Rx Detail** and **More (...)** > **Pharmacy** > **Workflow**.

Perform an Inventory Count and Set Up Drug Folders



- Conduct an inventory count. Set the [Monitor](#) flag for drugs you dispense in Propel Rx. [Adjust](#) On Hands to reflect physical stock.
- Set your **Re-Order Points** and **Re-Order # Packs** in the Drug Folders using the [Re-Order Analysis report](#) as a guide.

Complete the tasks listed on this page daily to help maintain accurate On Hand counts in Propel Rx. Completing these tasks daily saves you time from having to investigate On Hand discrepancies in the future.

When Entering Prescriptions in Propel Rx...



Monitor new items as they're used in prescriptions.

Ensure the correct monitored pack size is chosen. Centrally maintained pack sizes are bolded. An *Unmonitored* indicator appears in the Drug section of Rx Detail if the pack size is Default and unmonitored.



If you see an *Invalid Item Number* indicator in the Drug section of Rx Detail, correct the item number in the Drug Folder before filling the prescription. This indicator appears whenever an item number of 000000 is entered.

When dispensing a prescription using multiple pack sizes, use the **Pack Size Selection** window to decrement inventory appropriately across the pack sizes.



Spot check the On Hand in Propel Rx against what's on the shelf.

If On Hand discrepancies are found, **Adjust** the On Hands in Propel Rx.

When Sending or Receiving Purchase Orders...



Send and **reconcile** purchase orders electronically through Propel Rx.

Review and **ACTION** the **Auto-Reconcile Exceptions report**.

When receiving inventory, rotate stock so products with the longest expiry are at the back and those expiring earlier are at the front.



Mark open bottles with an "X" so they can be easily identified and used first.

When the Owe Balance Window Appears in Rx Detail...



Validate that your physical stock is truly short. If the On Hand is incorrect in Propel Rx, adjust the On Hand from the **Owe Balance** window (📄). If the pack size should not be monitored, turn off the **Monitor** flag in the Drug Folder.

propel^{Rx} Perpetual Inventory

Weekly/Monthly/Quarterly Tasks

Complete the tasks listed on this page weekly, monthly, or quarterly to help maintain accurate inventory levels in Propel Rx. Completing these tasks regularly will help your pharmacy perform cycle counts and maintain appropriate stock levels.

Review NCT Inventory

Weekly

- Conduct a regular cycle count of your narcotics, controlled drugs, and target substances (NCTs). Leverage the [Inventory History report](#) (formerly known as the Inventory Reconciliation History report).
- Investigate On Hand discrepancies of NCTs by reviewing the [Shipment](#) window in the **Drug Folder Inventory** tab.
- Update the On Hands of your NCTs if needed using the [Cycle Count module](#) (formerly known as the Inventory Reconcile module).

Review Regular Inventory

Monthly/Quarterly

- Conduct a regular cycle count of your regular drugs. Leverage the [Inventory History report](#) (formerly known as the Inventory Reconciliation History report).
- Investigate On Hand discrepancies by reviewing the [Shipment](#) window in the **Drug Folder Inventory** tab.
- Update the On Hands if needed using the [Cycle Count module](#) (formerly known as the Inventory Reconcile module).

Check Shelves for Expiries

- Prepare expired products for return.

Review Reorder Parameters

- Too much or too little of a drug in stock? Review the [Re-Order Analysis report](#) and update **Re-Order Points** and **Re-Order # Packs** in the Drug Folders if needed.