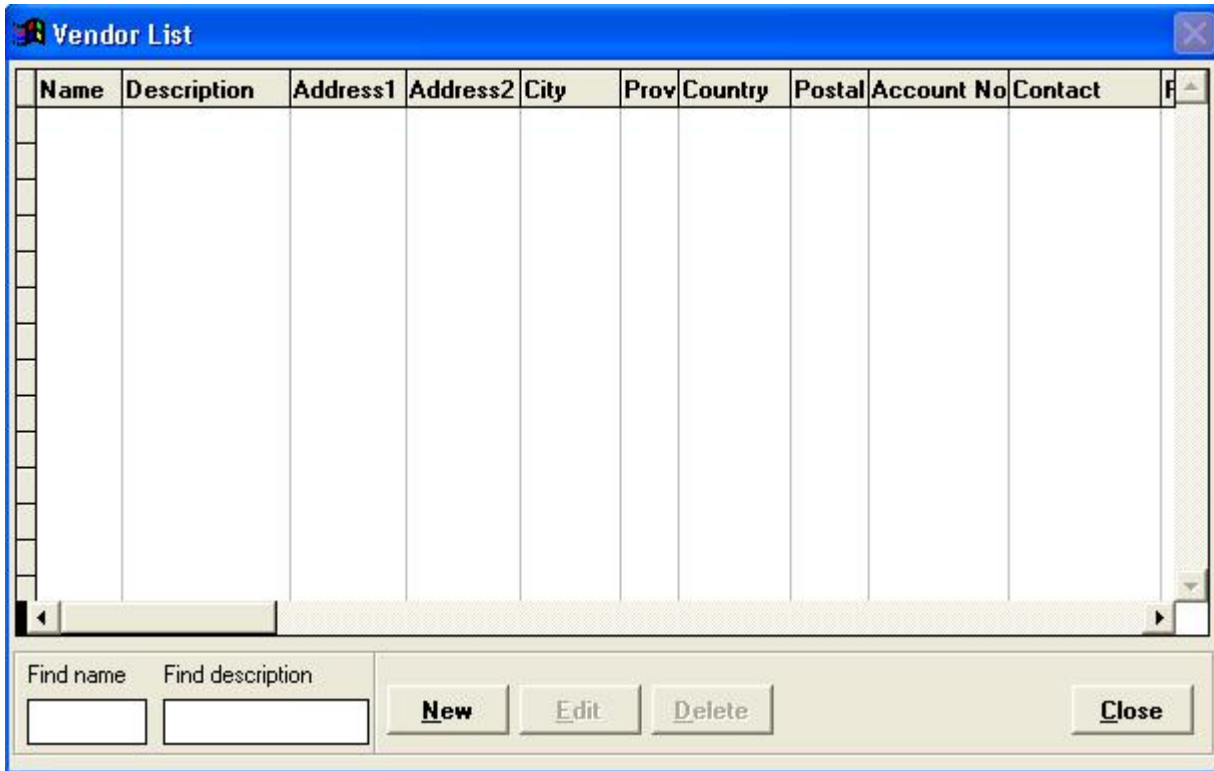


## Setting up Vendors

Associated with each product you are selling, you may specify a vendor for ordering purposes. To select the list of vendors already created (from which you can create new vendors), select the menu items *Modules/SmartStore/Vendor* . The form below will appear.



Name	Description	Address1	Address2	City	Prov	Country	Postal	Account No	Contact	F
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Find name    Find description

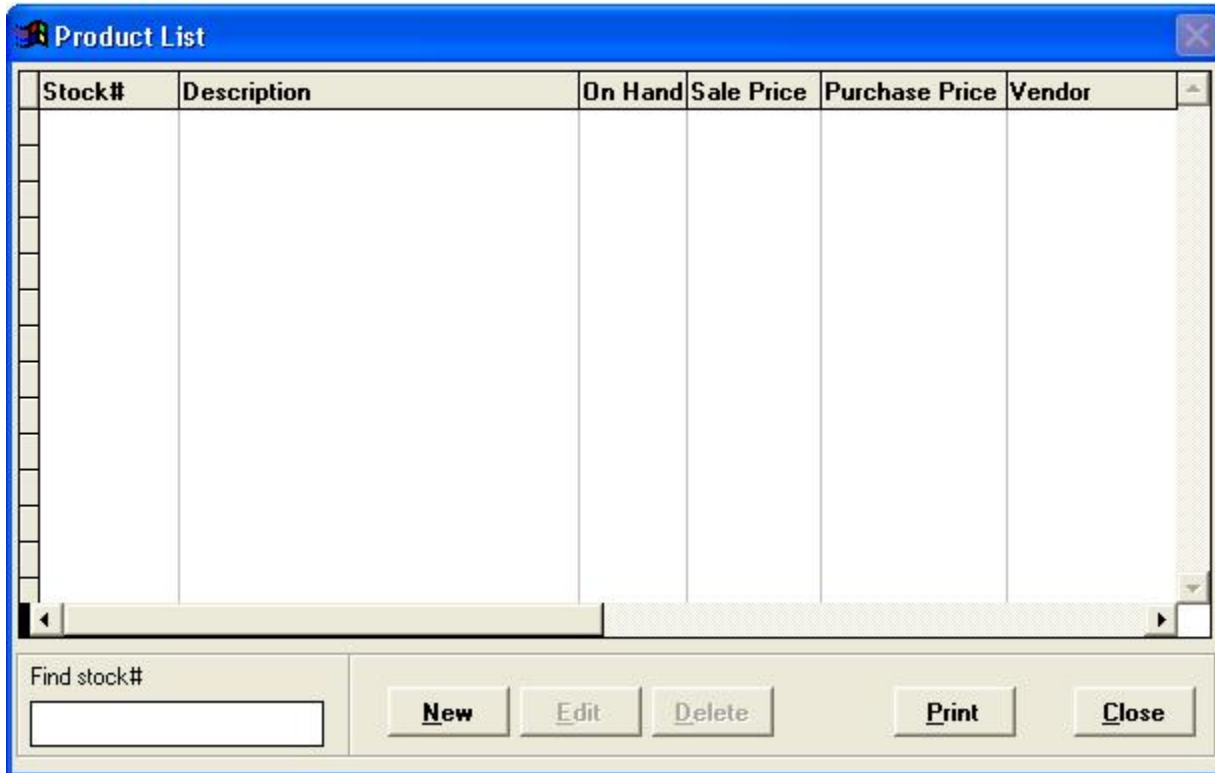
  

**New**    **Edit**    **Delete**    **Close**

Create a new product type or update an existing one by selecting the **New** or **Edit** buttons. (See [Vendor Maintenance](#).)

## Setting up Products

You must specify each product you are selling. To select the list of products already created (from which you can create new products), select the menu items *Modules/SmartStore/Product*. The form below will appear.



Stock#	Description	On Hand	Sale Price	Purchase Price	Vendor
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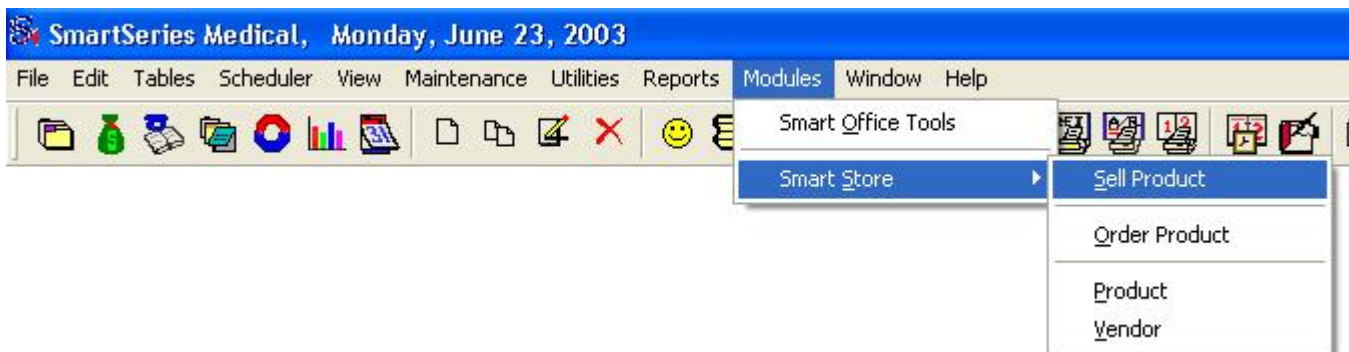
Find stock#

**New** **Edit** **Delete** **Print** **Close**

Create a new product or update an existing one by selecting the **New** or **Edit** buttons. (See [Product Maintenance](#).)

## Initiating a Product Sale

In order to initiate the sale of a product, you may either use the menu items *Modules/Smart Store/Sell Product* as shown below,



or, while invoicing for a regular service item, you may check the **Include Retail** box (at the end of the amount line).

The screenshot displays the 'NEW/ADD Invoice Line' form for patient Peter, S. The form is divided into several sections:

- Insurance:** PRIVATE, Identity #, Claim #, Deduct 0.00, VCH 0.00, Invoice # 0000001.
- Account:** Jean S, Acct JS, Pract., Payee, Facility 00000, Subfacility 00000, Service Date 06/23/2003.
- Item Line:** Qty 1.00, SC 00, Item Code 00110, Description CONSULTATION - IN OR OUT OF OFFICE, Amount 82.90, Tax, and an unchecked 'Include Retail' checkbox.
- Diag:** ICD9, Description, 2nd Diag, 3rd Diag, Comment.
- Referral Doctor:** No Referra, Times (24 hour clock), After Hours Indicator, Start Time 0:00, Finish Time 0:00.
- Location:** H - Hospital, To 00, MVA, Pmt. Mode 0, Electronic Note.
- Submission Codes:** None, Add/Edit Note, None.
- Summary:** Balance 0.00, Personal 0.00.
- Buttons:** Bill, Edit Patient, Open Eform, Close.

In either case, you will be presented with the sales input screen. (See [Sales Screen](#)).

### Sales Screen

This form is activated from either the main menu or from the service invoice form (see [Initiating a Sale](#)).

**Retail Bill: Peter, S**

**Bill** | **Bill List** | **Bill History**

Account name: [dropdown] Date: 06/23/2003

Stock#: [dropdown]

Product description: [text area]

Product barcode: [text box] On hand: 0

Vendor name: [text box] Cost: 0.00

Price: 0.00 Quantity: 1 Tax: [text box] Total: 0.00

Note: [text area]

**Add to Bill List** **Cancel**

When you have selected a product, specified the quantity to be sold, and input a note (if desired), hit the **Add to Bill List** button. You will be shown the Billing List form shown below.

Account name	Stock#	Product description	Price	Qty	Tax	Total	N
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Total:

At this point you may select the **Bill tab** at the top of the screen to enter another sale or, if you have entered all the items to be sold, select the **Bill** button at the bottom of the form to complete the sale.

**Delete** will remove the product currently selected from the list of sale items. **Cancel** results in the entire sale being voided.

The patient receipt is printed with the usual **Print Invoice** command from the tool bar.

## Reviewing Patient Sales

To see what retail items have been sold to a patient, select the **Invoice List** form below. The retail items will be shown in blue.

Invoice List										
Invoice#	Line#	Date	Patient	Acct	Qty	Insurance	Item	Balance	Status	
1	7	08Jul03	Muller, Joan V	JAG	1.00	PRIVATE	00001	12.84	CH	Pillow

## Account Sales History

To see what retail items have been sold to a particular account, select the *Modules/Smart Store/Sell Product* menu item and go to the **Bill History** tab which will give you the form shown below:

The screenshot shows a software window titled "Retail Bill: Muller, Joan V". It has three tabs: "Bill", "Bill List", and "Bill History", with "Bill History" selected. Below the tabs is an "Account:" label and a dropdown menu containing "DR. J.A. GARDINER". To the right of the dropdown is a "Close" button. Below this is a table with the following data:

Date	Stock#	Product description	Quantity	Note
07/08/2003	111-NEW-1234	Pillow	1.00	Memo

