

# Set up Stock Management

Last Modified on 10/05/2024 10:17 am AEST

Set up Zedmed Stock Management for branches, staff and products, including vaccines and consumables.

# **Enable Stock Management**

To enable Stock Management:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice Setup > Branches.
- 3. Select the branch you want to enable Stock Management for.

You will repeat the following steps for each branch using Stock Management.

- 4. Select Options.
- 5. Select the Enable Stock Management System checkbox on the lower left.
- 6. Select **Close** to save and exit.

You may need to log out and back into Zedmed for Stock Management to open for the first time.

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General			File Numbering		
Default Encounter Sheet	Standard Encounter Sheet	~	System	○ None	
Default Account Holder	Private	~	Waiting Room		
Default Bank Account	Albert Road MC Bank Account	t 🗸	Default Order	ne 🗸 🗸	
Invoice Header	Standard	~	Default Filter	Not Billed	~
Assignment Form Type	A4	~	Default Lookback	-8 🚔 Long w	aiting (Mins) 30 🚔
Remittance Advice on Invoic	es 🛛 Accept Credit Card	ls	Auto-refresh frequ	uency (Seconds) 0	
Print Medicare Claim Forms	Medicare	~	SMS Setting Provider	s	MS Sender
Default Print Encounter Shee	t Default Print Case I	Label	SMS Central	51429100676	
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Print Gap Always defaults Medicare gap			Provider's Credit C	heck URL	
Day Surgery Link					
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Use Classic Patient Search	Edit Archived Patier (Including Make App unt Blank	nts pointments)	User Name Zer	dmedSupport P	assword
MC Plus Items Using 109	90 64990 74990	~	2-Way SMS	SMC	
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MA Online			MA Online Overwrite L	ocation	
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Patient Claims Interacti	ve realtime 🛛 🗸				

#### Set up your browser

The Stock Management user interface is a webpage and works best with the Chrome browser. We recommend using Chrome, and you will need to change to Chrome if your default browser has any issues.

There are two ways to open Stock Management in Chrome:

- Set Chrome as the default browser (on the computer running Zedmed).
  - To learn more, see Google's guide to changing the default browser.
- Copy the Stock Management URL from your default browser into Chrome's address bar.

### Set up staff access

Access to Stock Management is assigned in Zedmed's Security section using Stock Control functions. By default, the Doctor and Nurse roles include the **Add Consumable** function.

To add Stock Control functions to a role:

1. Go to Zedmed's Utilities tab.

2. Select Security.

The Zedmed Security Roles and Users screen will open.

- 3. Select the Roles tab.
- 4. Select the role you want to give Stock Management access to.
- 5. Select Edit.

💋 Zedmed Security Roles a	and Users			-3		Х
Staff Roles User Groups	Database Users API Access					
_			Selection Filter:	Staff		~
Role Name	Description					
Administrator	System setup and administration rights (Office)					
Receptionist (Typist)	General secretarial work in Clinical					
Doctor	Clinical functions					
Nurse	Clinical functions (limited)					
High access (Office)	High level access in Office					
Medium access (Office)	Medium level access in Office					
Basic access (Office)	Basic level access in Office (limited)					
Administrator (Clinical)	System setup and administration rights in Clinical					
Low Doctor access (Office)	Low level Doctor access in Office					
Medium Doctor access (0	Medium level Doctor access in Office					
High Doctor access (Office)	High level Doctor access in Office					
Copy Delete		Print	Add Edi	t	Clos	e
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The Role Properties screen will open.

The **Stock Control** functions in the **Available Functions** pane are used to provide different levels of access to different roles. The only access assigned by default is the **Add Consumable** function for the Doctor role.

- 6. In the Available Functions pane, select the Stock Control function you want to assign to the role.
- 7. Select the arrow icon to move the functions to the **Included Functions** pane.

Repeat these steps to add the required **Stock Control** function to the relevant roles. The staff that have those roles will then have access to those Stock Management functions.

8. Select **OK** and then **Close**.

ole Name: [	Doctor	Description:	Clinical functions	
Used in Clin	ical Work Flow (Results Inbox)	Role Type:	Staff	~
Available Fun	ctions		Lance	Included Functions
<ul> <li>Account</li> <li>Administ</li> <li>Appoint</li> <li>Banking</li> <li>Batching</li> <li>Daily Re</li> <li>Debtors</li> <li>Encount</li> <li>Patient F</li> <li>Practice</li> <li>Referen</li> <li>Reports</li> <li>Results I</li> <li>SMS</li> <li>Stock Cc</li> <li>Add/ Add/ Manu Stock</li> <li>Stock Cc</li> </ul>	ing Transactions ration ments ports er Records Setup ce View Tab Processing ontrol Supplier Edit Product ially Adjust Stock Levels k Control (Read only) ctake y View			<ul> <li>Administration</li> <li>Australia Immunisation Register</li> <li>Data Exchange</li> <li>Encounter</li> <li>Patient Records</li> <li>Practice Setup</li> <li>Reference View</li> <li>Reports</li> <li>Results Processing</li> <li>SMS</li> <li>Stock Control Add Consumable</li> <li>Summary View</li> <li>Tools</li> <li>Utilities</li> <li>Waiting Room</li> </ul>
Evened	All			Expand All

#### Create a product's item number

Products in Stock Management need an **Item Number** if you want the product to appear on the invoice. If a product does not have an item number, you will need to create one. Products can be selected during a clinical encounter even if they have no item number, but they will not be added to the invoice.

To create your own item number:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice Setup > Items > Item Details.

The Find Item screen will open.

- 3. Enter the Item Number you want to use into the field provided.
- 4. Select Find.
- 5. At the **No Item Found** dialogue, select **Yes** to create a new item.
- 6. Fill in the **Short Description** field.
- 7. Enter a price for the item into the P1 Value field and select tab on your keyboard.

This is the price the item will be billed at on an invoice.

- 8. Complete any other fields relevant to the product and its pricing.
- 9. Select Close to save and Exit.

This Item will now be a selectable option when adding a product in Stock Management in the **Associated Items** section.

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Details Standard Doctors Insurer	s Analysis		
MA Fees	DVA Fees	Private/3rd Party Fees Value Disco	unt
(MC/MC100)	Confirm	×	
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75%		Yes No	
Item # Add-On for	D (%)	Work Cover	
Multiples Add-On for 7+	In Hospital	Motor Vehide	
Get Derivation Item	D (%)	Legal/Hospital	

# Add a Product Category

A Product Category must exist for a consumable before it can be added to Stock Management - as this is a mandatory Product Category selection when it is added. When you add a new category you will need to close and reopen Stock Management for the new category to appear.5

To add a product category:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice Setup > Drop-Down List Management.
- 3. Select Product Category.
- 4. Select Add Value.

An entry field will open.

- 5. Enter a name for the **Product Category** into the field.
- 6. Review the branches the category is available for.

The branches are shown along the top and, by default, the new category will be available for all branches. Deselecting the **Active** box will disable the category for all branches.

Reception A	Management	Reports	Utilitie	s			
Batching							
Debtors	😢 Drop-Down List Managemen	t			-		>
	Appointment Cancellation Reasons	Description	Active	MED	✓ &	BR3	
Deports	Checklists	Gloves			$\checkmark$	$\checkmark$	$\checkmark$
Reports	Instrument	Vaccines	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
		Bandages	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
	Procedure Type	Miscellaneous	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Practice Setup	Product Category	Protective Wear	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
	Prosthesis	Syringes and Needles	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
	Stock Movement Reason	Diagnostic and Testing	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
WP Setup		Scalpels, Blades and Incision	$\checkmark$	$\leq$	$\checkmark$	$\leq$	$\checkmark$
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AIR							
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# Set up Stock Movement reasons

When you perform a Stock Adjustment, you will be asked to provide a reason. There are a set of pre-defined reasons that cannot be removed or edited, but you can add new ones.

To add a Stock Movement reason:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice Setup > Drop-Down List Management.
- 3. Select Stock Movement Reason.
- 4. Select Add Value.

An entry field will open.

- 5. Enter a reason for a stock movement into the field.
- 6. Review the branches the category is available for.

The branches are shown along the top and, by default, the new category will be available for all branches. Deselecting the **Active** box will disable the category for all branches.

Reception A	Management	Reports	Utilitie	S			
Batching							
Debtors	💋 Drop-Down List Management	t			=		
	Appointment Cancellation Reasons	Description	Active	MED		BR3	
-	Charddists	Stock Received					
Reports	Checklists	Manual Increase					
	Instrument	Manual Decrease					
	Procedure Type	Shrinkage					
Practice Setup	Product Category	Expired		$\checkmark$			
	Prosthesis	Returned		$\checkmark$	$\overline{\checkmark}$		
	Stock Movement Reason	Immunisation			$\overline{\checkmark}$		$\overline{\mathbf{v}}$
WD Cotup	otock novement recoont	Item Split From		$\checkmark$	$\overline{\checkmark}$		
WP Setup		Item Split To			$\overline{\checkmark}$		
		Consumable Used		$\overline{\checkmark}$	$\overline{\checkmark}$		
		Stocktake			$\checkmark$		$\checkmark$
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Stock Management		Add Value Delete Value		(	Close	0	Cance
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# Add a supplier

To add a supplier to Stock Management:

- 1. Go to Zedmed's Management tab.
- 2. Select Stock Management.

The Stock Management UI will open in Chrome.

- 3. Select **Suppliers** from the left menu.
- 4. Select Add Supplier from the top menu.

This will open the Add Supplier screen.

- 5. Enter the supplier's **Name**.
- 6. Fill in the other optional fields.
- 7. Select Save.

Sto	ck Management		Q Search	
Branc	h1 ≁	Supplier Name          Website           EBOS Healthcare Australia	Phone Number	Email Contact Name
Φē	Products	McEar Medito		
a	Suppliers	Medst		
¢	Stocktake	Name *		
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		Email Contact Name		
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