# McKesson Web Services

## User Guide

July 2021

TELUS | Health

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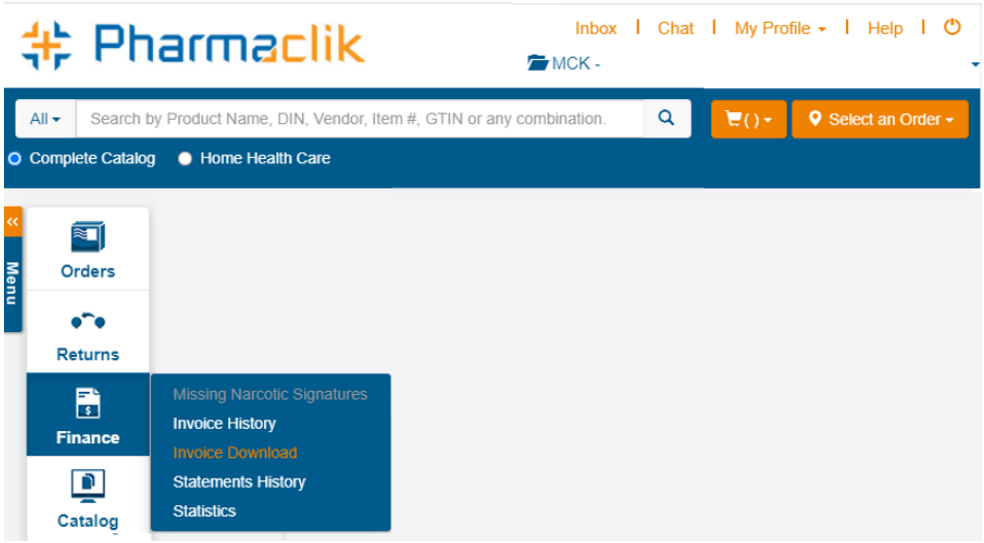
# McKesson Web Service

The McKesson Web Services are a simple, streamlined approach use by pharmacies to manage their daily operations with McKesson's Pharmaclik site. By using the McKesson Web Services, your pharmacy's order/receiving system communicates directly with McKesson, eliminating the need to upload/download manually your order, catalog and invoices to the Pharmaclik website.

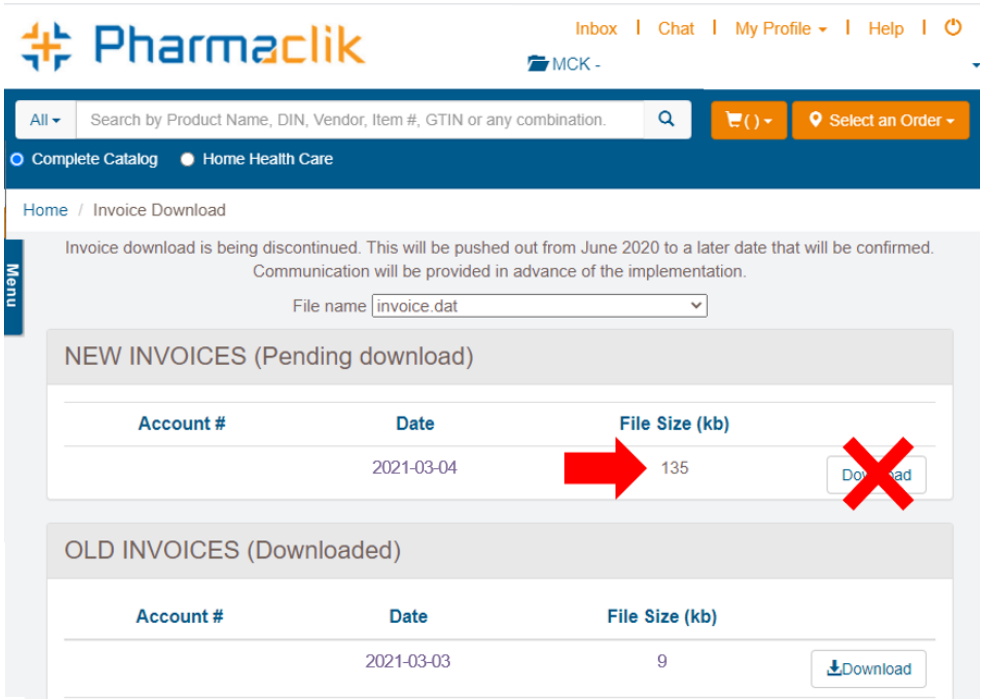
You must have Kroll V10 SP17 or higher to use this functionality.

## Before you start:

- This documentation is meant to be used as an append of "Vendor Configuration, Ordering, and Receiving user guide".
- When an order is created on the Kroll system and transmitted, or it is placed directly on Pharmaclik, one or more electronic invoices will be generated related to your order. These invoices will be available on:
    - The legacy Pharmaclik "Invoice Download" functionality; and
    - Web Services functionality.
- Contents and layouts of the files on the two functionalities above are different but related to the same order.
- It is **crucial** to download and receive the *invoice.dat* file using the legacy Pharmaclik "Invoice Download" functionality **BEFORE** setting up and turning **ON** the Web Services functionality to avoid double receiving.



- The legacy Pharmaclik “Invoice Download” functionality will continue to work until McKesson deactivates it in the near future.
- Deactivation date not announced yet by McKesson.
- You will be able to see the *invoice.dat* file growing in size on Pharmaclik every day until that functionality is deactivated. <u>DO NOT download and receive the *invoice.dat*</u> file **AFTER** turning **ON** the Web Services functionality.



# Setup

Please, read “Before you start” section.

Upon upgrading to the McKesson Web Services, you will notice several significant changes in the McKesson **Vendor Information** screen under Utilities > Drug Ordering > Edit Vendor List > McKesson.

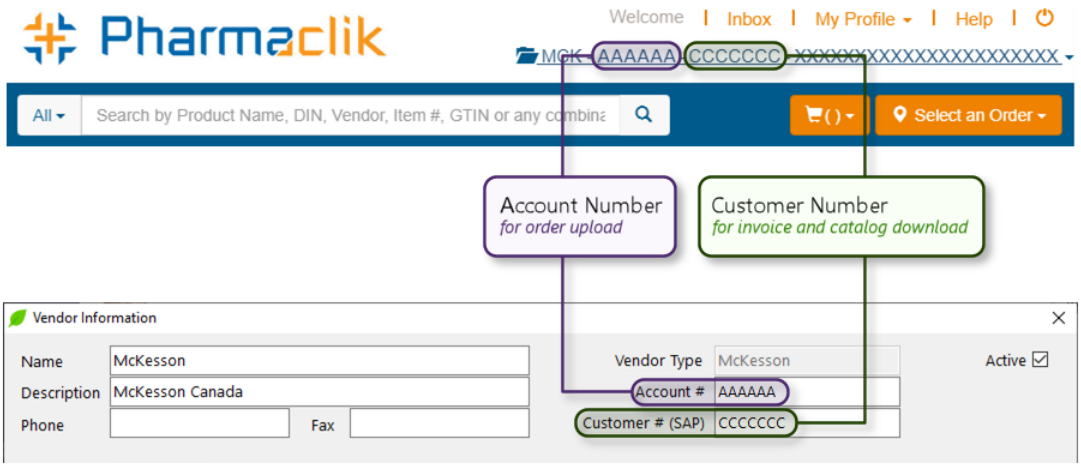
## Accounts

Account number and Customer number need to be used.

- For Order upload, “Account Number” is required.
- For invoice download, “Customer Number (SAP)” is required.
- For Catalog download, “Customer Number (SAP)” is required.

Invoice and catalog download requires an SAP account number (number starting with 7 or 8), a.k.a. Bill to number.

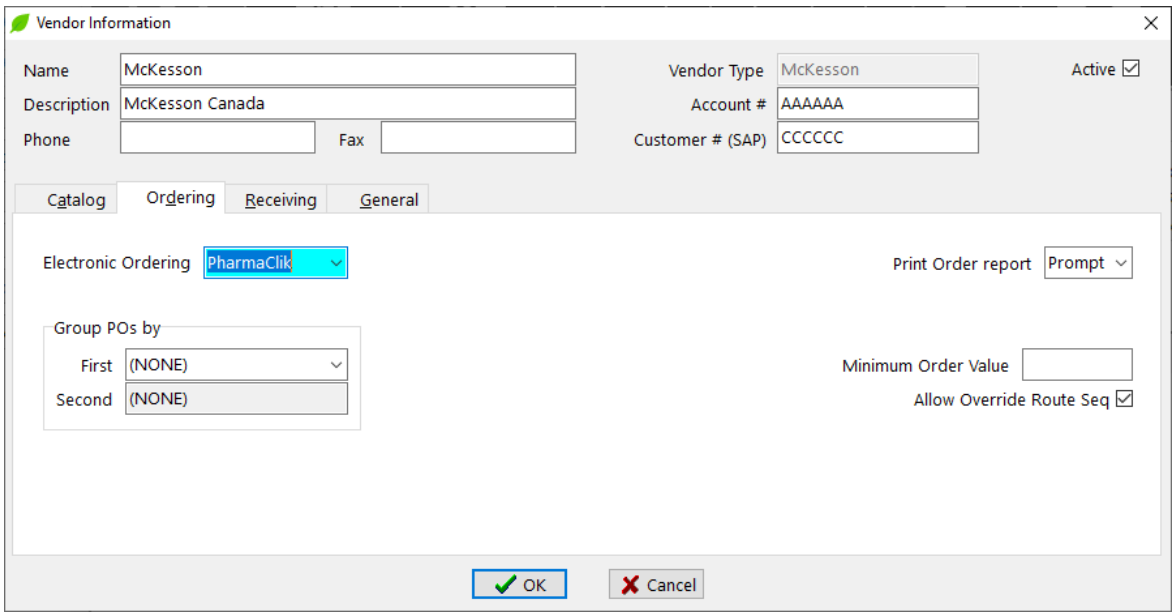
An easy way to get it is from the Account Selector, as indicated in the screenshot below



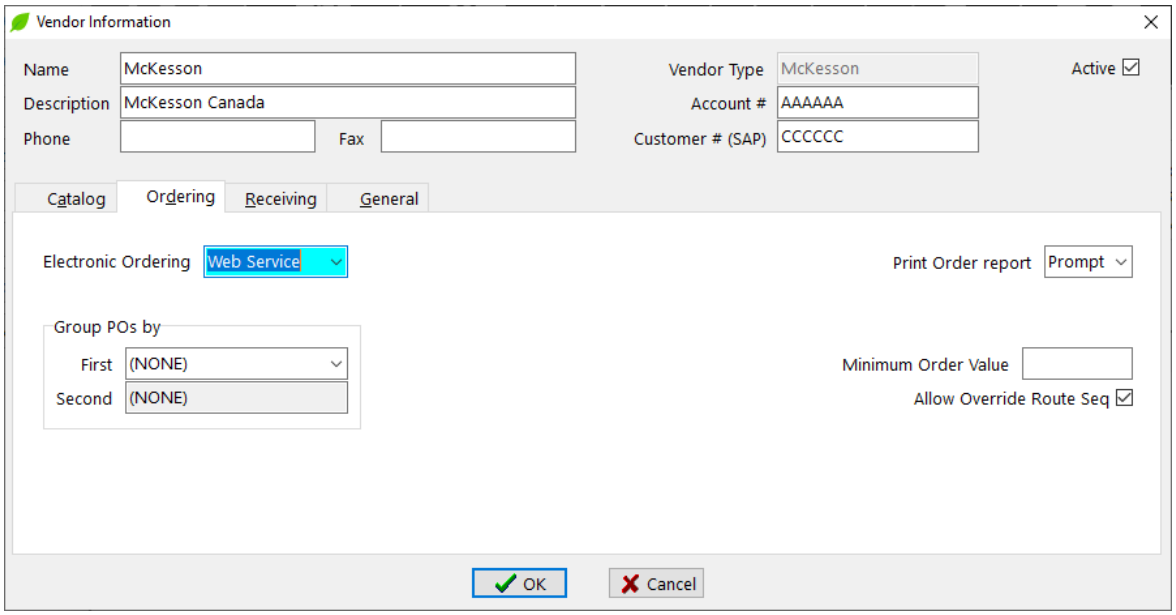
# Ordering Tab:

The **Electronic Ordering** field in the **Ordering** tab needs to be set to **Web Service** instead of **Pharmaclik**.

*Before*:



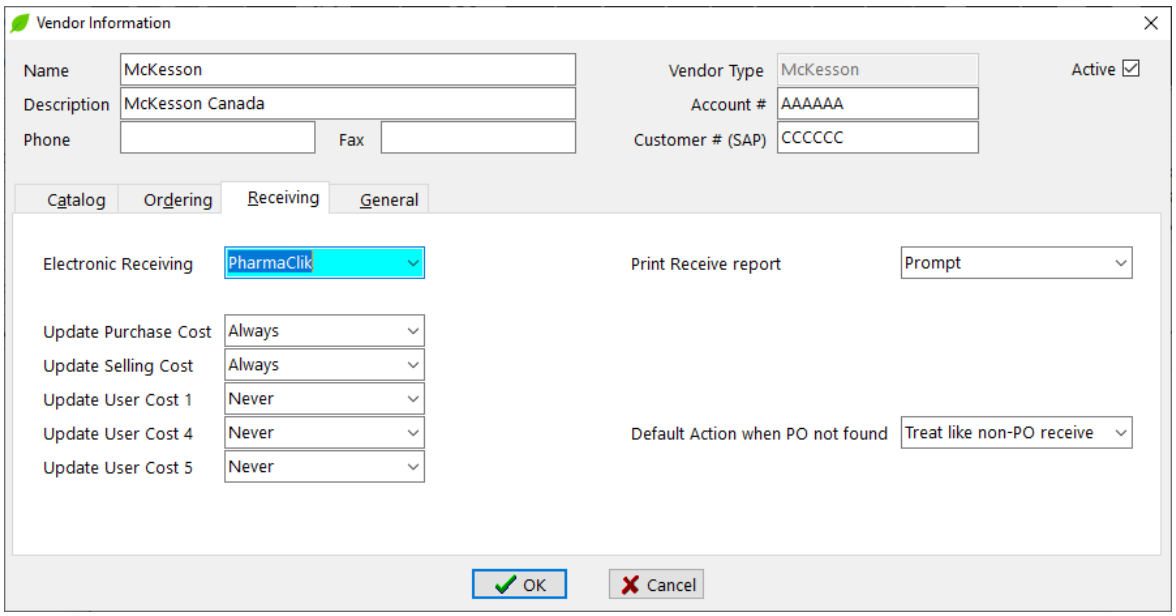

*After*:



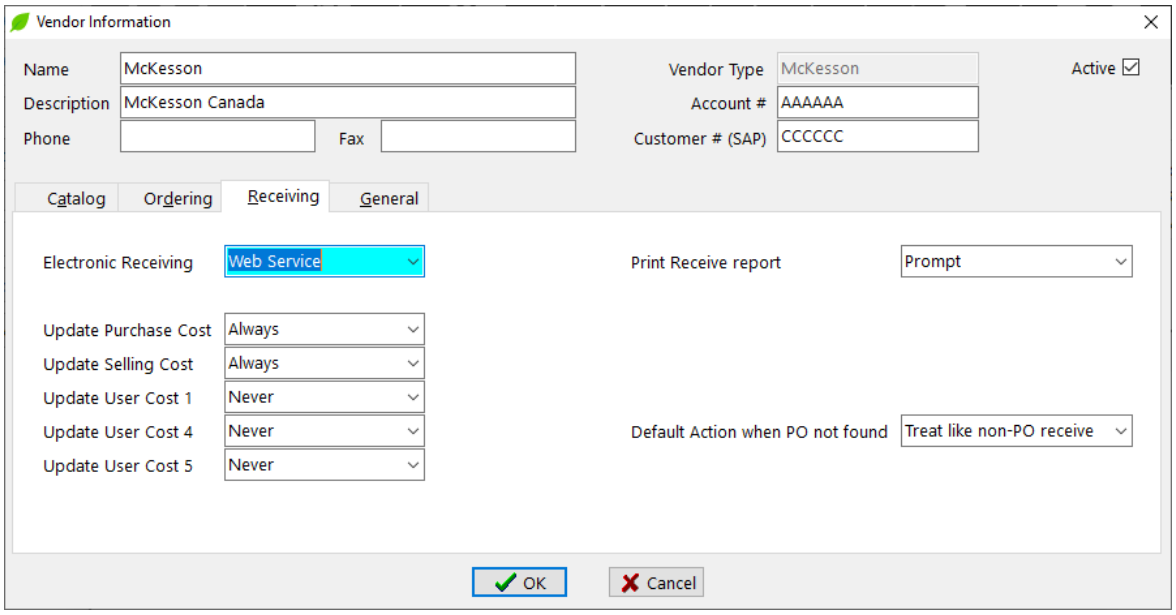
# Receiving Tab:

The **Electronic Receiving** field in the **Receiving** Tab needs to be set to **Web Service** instead of **Pharmaclik**.

*Before*:



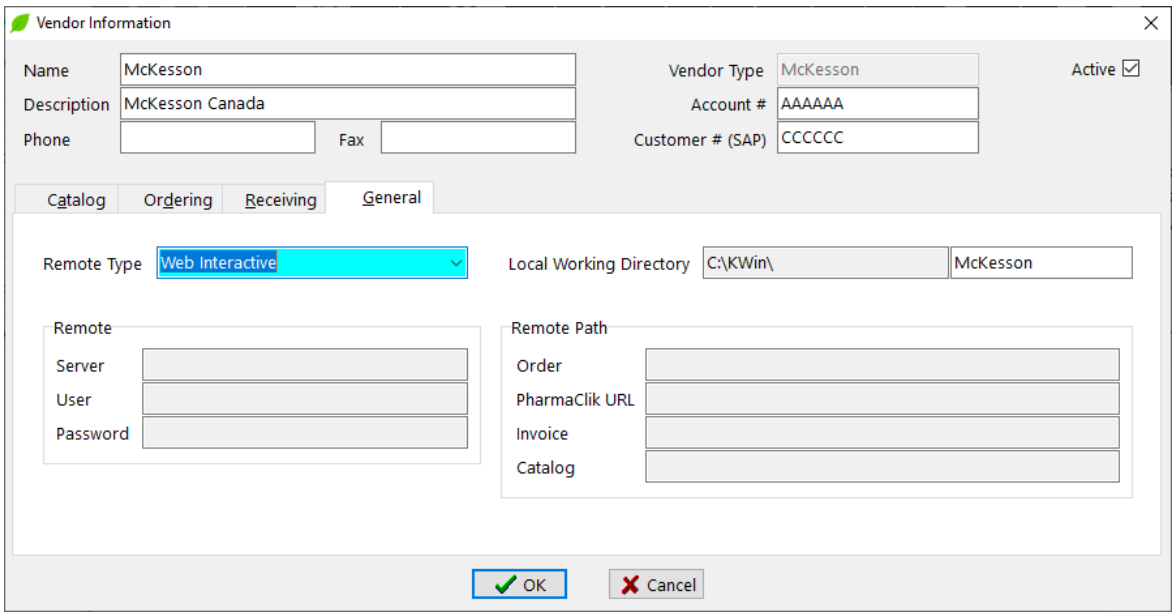

*After*:



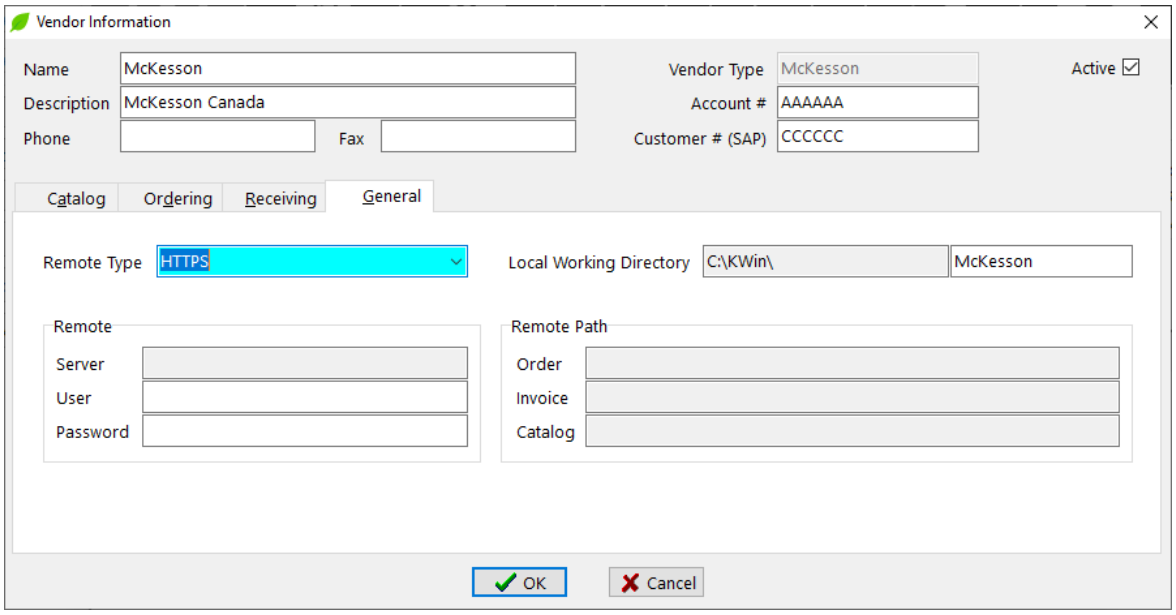
# General Tab:

The Remote Type field in the General Tab will be set to HTTPS, instead of Web Interactive.

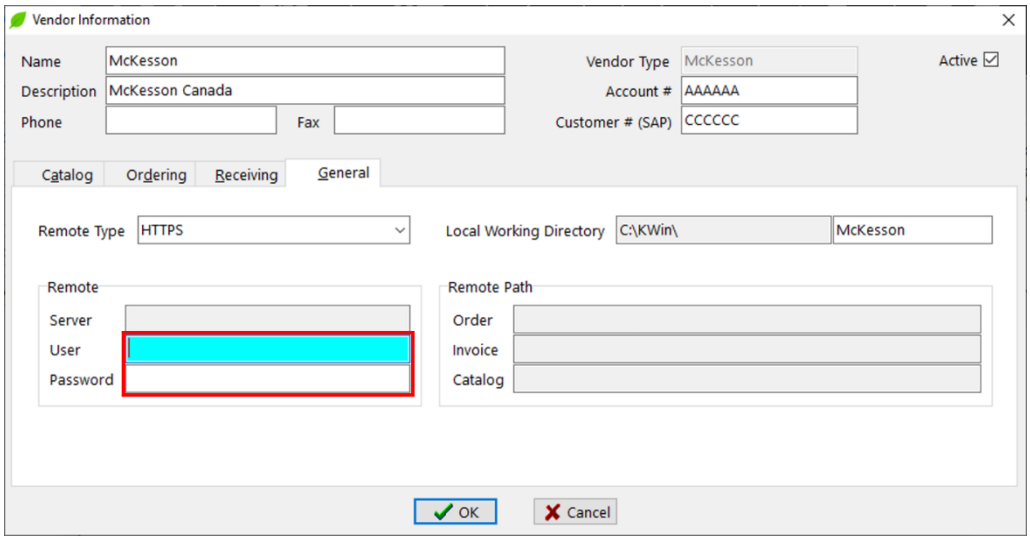
*Before*:




*After*:

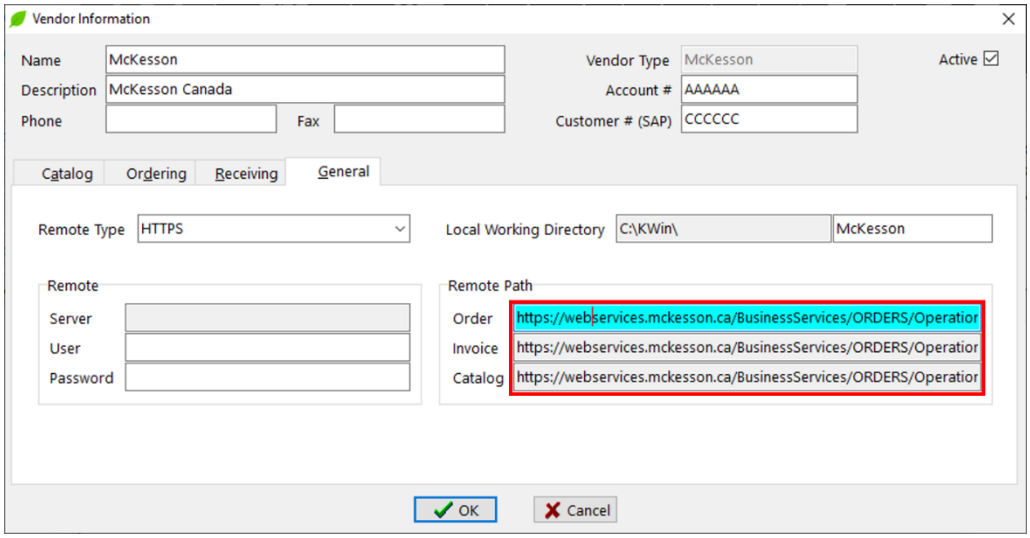


**NOTE**: A McKesson username and password are required. Enter your username and password under Vendor Information > General Tab. It is strongly recommended that you enter a valid McKesson username and password upon upgrading to the McKesson Web Services. This will ensure you are not prompted for user credentials the first time you try to upload a drug order or download an invoice or catalog. Passwords are valid for 60 days after their creation.




Also make sure the Remote Path is set properly to:

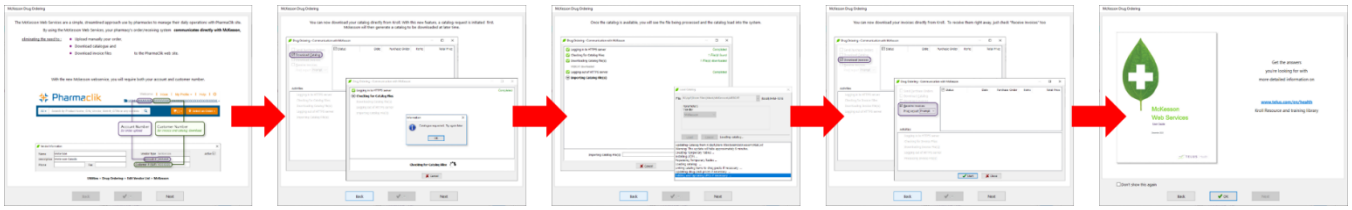
**https://webservices.mckesson.ca/BusinessServices/ORDERS/Operation/UploadOrderMessage**




These fields are not editable. If they are set to a different address, then the connection with McKesson Servers will not be possible. Please Contact Kroll support.

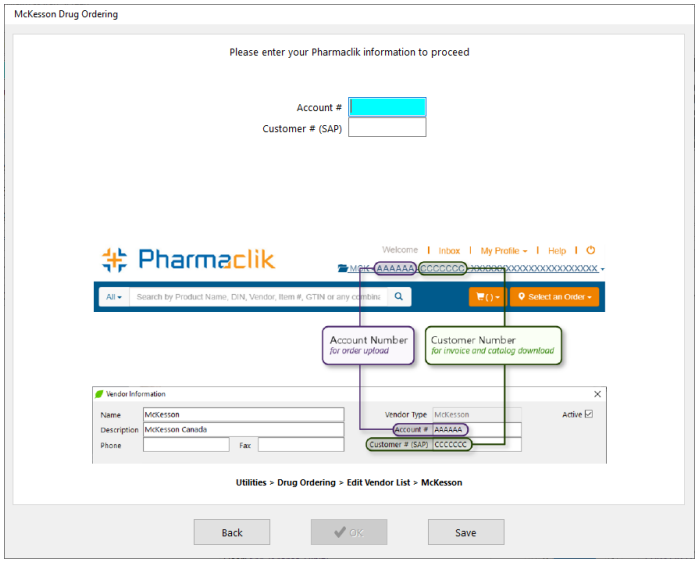
# What's New

Each user will be presented with the 'What's New' screen on the first attempt to communicate with McKesson. The 'What's New' shows a brief rundown on the changes introduced on this functionality. The format will be like a wizard with several pages.

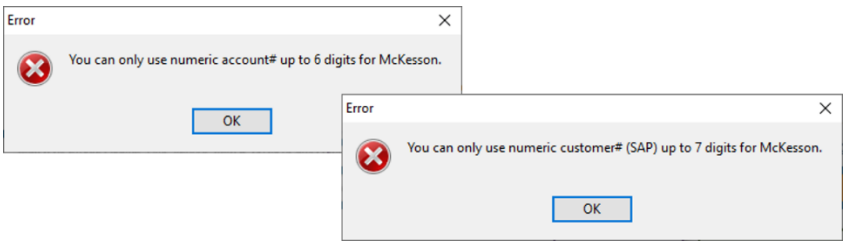


Next button shows the next instruction. Back button moves back to the previous instruction.

Suppose the "Account Number" and "Customer Number (SAP)" or one of them were not entered as was suggested in the Setup section. In that case, the wizard will require the first user of the McKesson Web Services functionality to enter them, as indicated on the screen below. If those numbers were entered as suggested in the Setup section, the wizard would not require them.

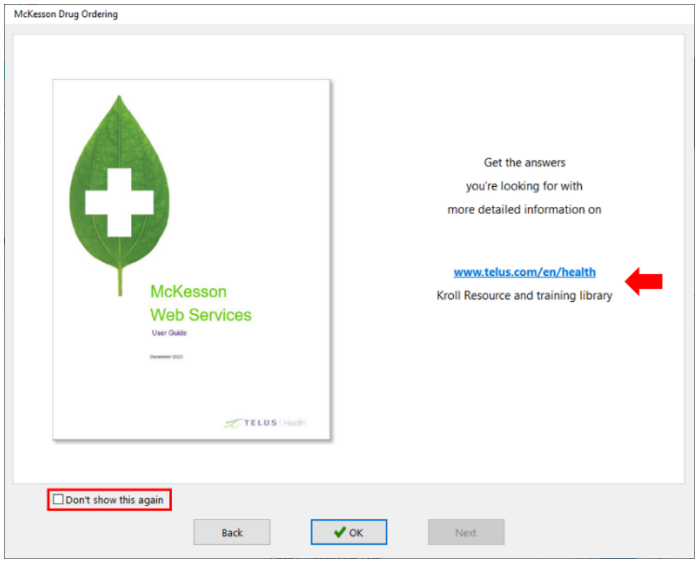



If required, the user has to enter those numbers to proceed; otherwise, the wizard will display error messages.



The “Account Number” and “Customer Number (SAP)” will be saved into the database. Later, you can view and modify those numbers on the Vendor information screen.

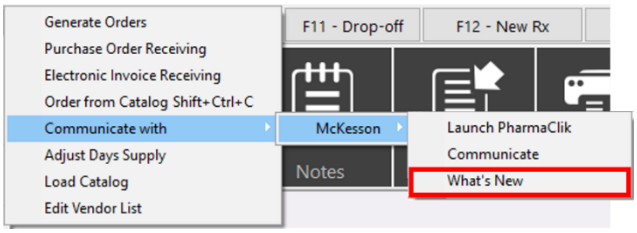
The last page contains an option to not show the wizard again. Each user needs to check this option to acknowledge the changes introduced on this functionality.




The last page also contains a link to this documentation.

If a user needs for any reason to see “What’s New” wizard again after clicking on “Don’t show this again”, please navigate to

Utilities > Drug Ordering > Communication with > McKesson > What’s New”.



# Catalog

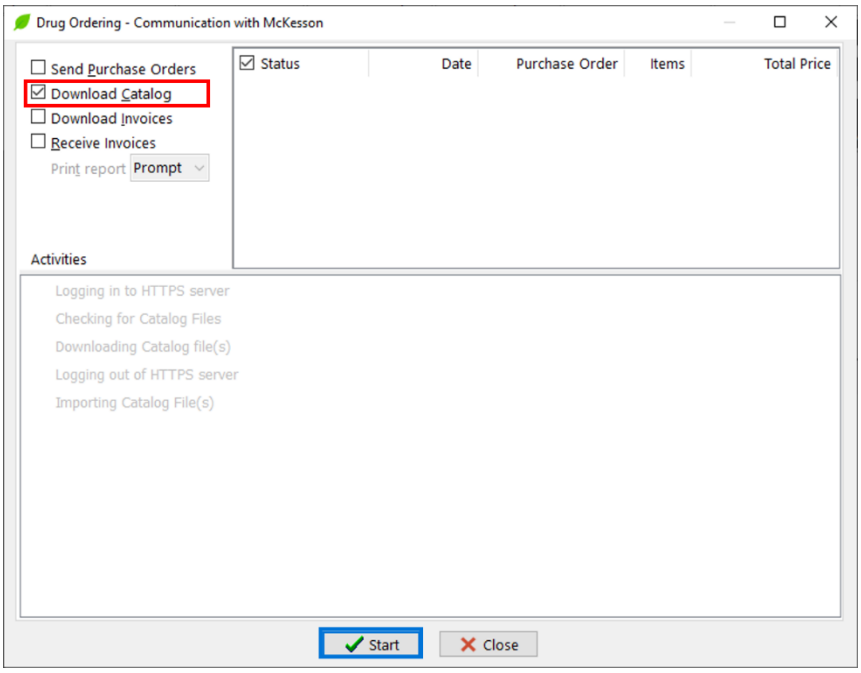
This section outlines the process for updating catalog files. When you perform this task, you instruct the system to download one or more catalog files posted on the vendor's server.

The process to download catalog files consists of three tasks:

- Checking for catalog files
- Downloading catalog files
- Importing catalog files

While checking for catalog files, a request is sent to McKesson for catalog. Downloading and Importing catalog files are done in a sequence when a catalog is available. Importing catalog files is executed after logging out of the McKesson's server.

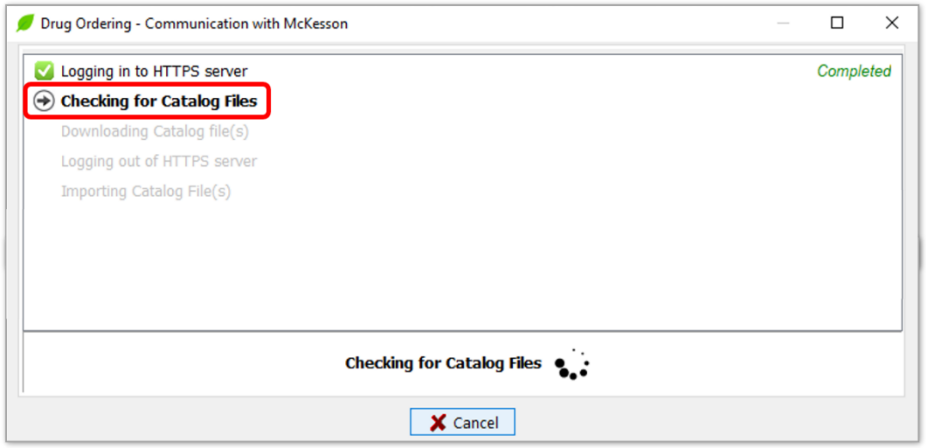
1. Navigate to Utilities > Drug Ordering > Communicate with > McKesson > Communicate.
2. The **Drug Ordering – Communication with McKesson** form will appear
3. Check the "Download Catalog" option and click **Start** or press **Enter** on the keyboard to check for catalog files.



- Customer # (SAP) is required for catalog download from **McKesson Web Services**. If you have NOT already entered your SAP number in the **Vendor Information** screen as was suggested in the Setup section, you will be prompted. Enter this number and click **OK**.

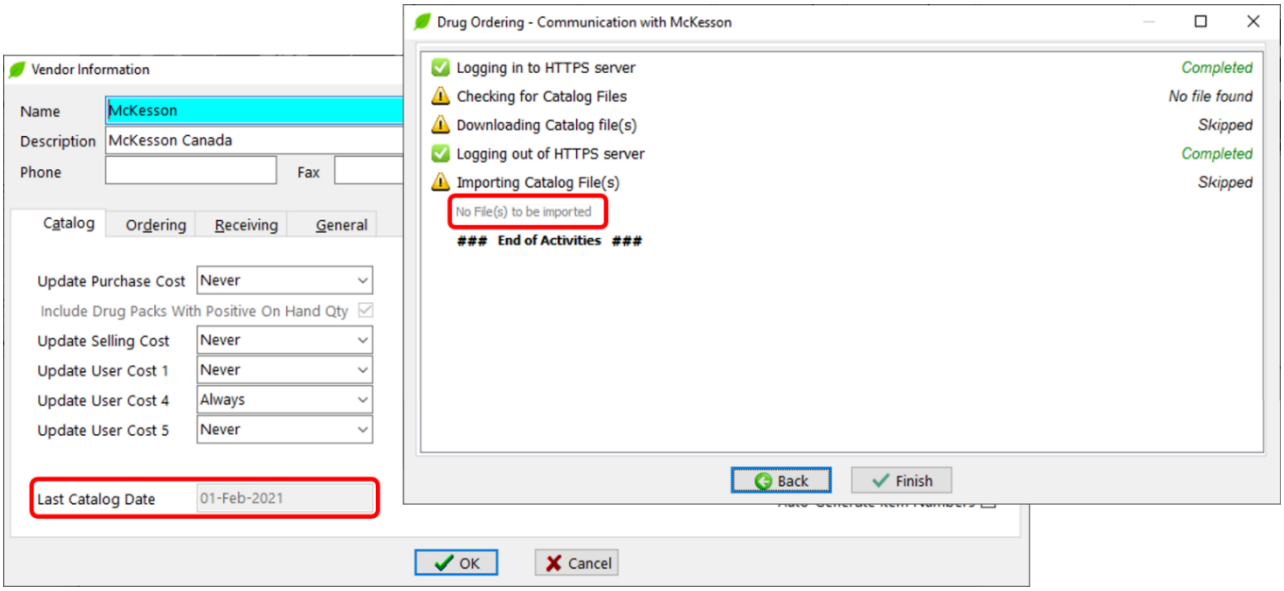

This is a one-time task; you will not be prompted again when requesting other catalogs. If you enter an invalid SAP number, you will get an error logging on HTTPS server.

4. The system will begin checking for catalog files and a request is sent to McKesson.



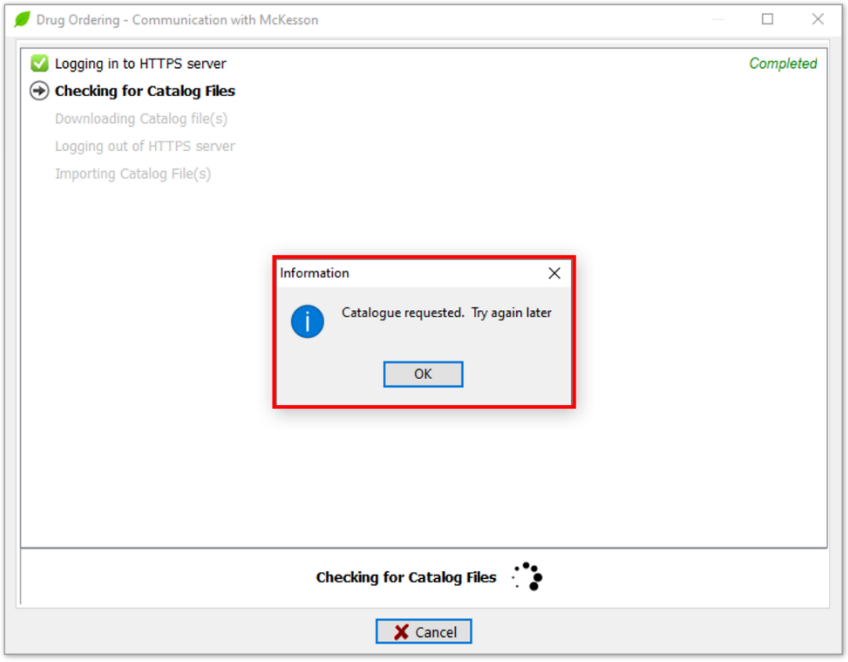

The catalog for the customer provided is **NOT generated automatically**. It will be generated by request and can be downloaded at any time, but a new one is only generated once per week. This means that multiple requests during a seven-day period will return the same catalog. On the 8th day, a new catalog would be generated and delivered.

Kroll system will compare the date the catalog was generated with the last catalog date saved on vendor settings. If it is the same or older, then the “No file to be imported” message will be presented.

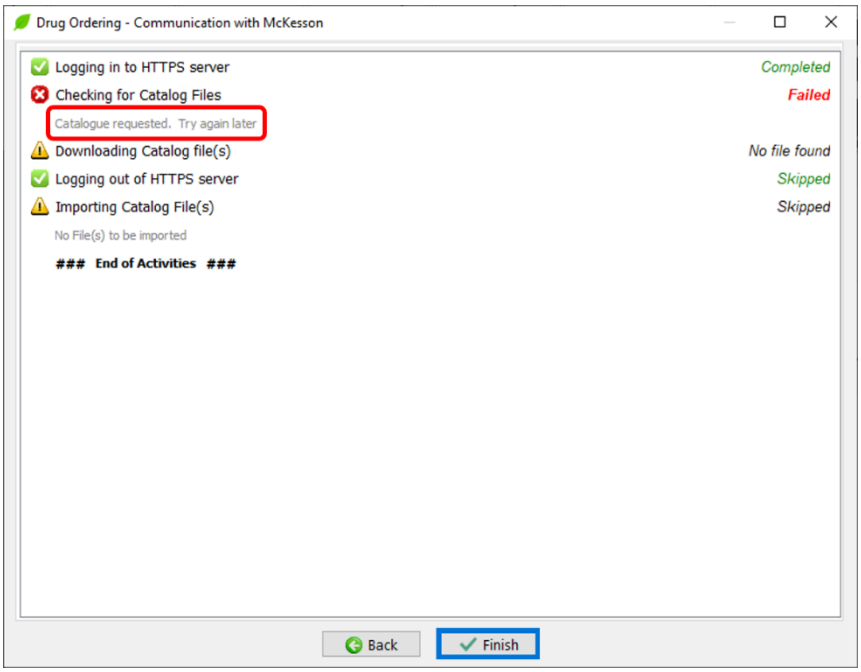



There are three possible responses:

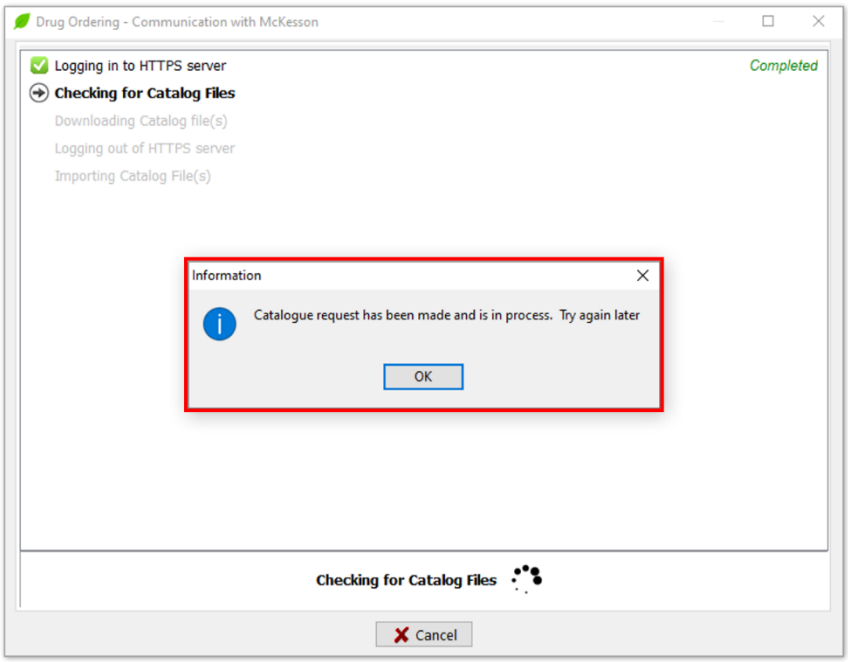
- “Catalog requested”. This is the first request being made for the catalog in the allowed time frame - one week period.




Click **OK** then **Finish** and repeat steps 1-3 after couple of minutes

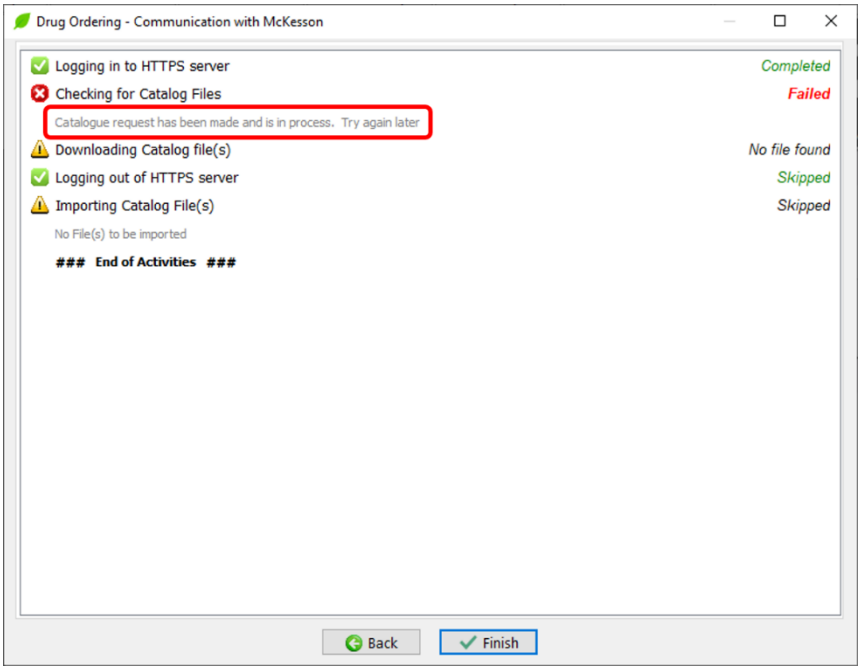



- "Catalog request has been made and is in process." This is not the first request, and the catalog is in the process of being generated. Be patient. The catalog generation could take to 10 minutes.



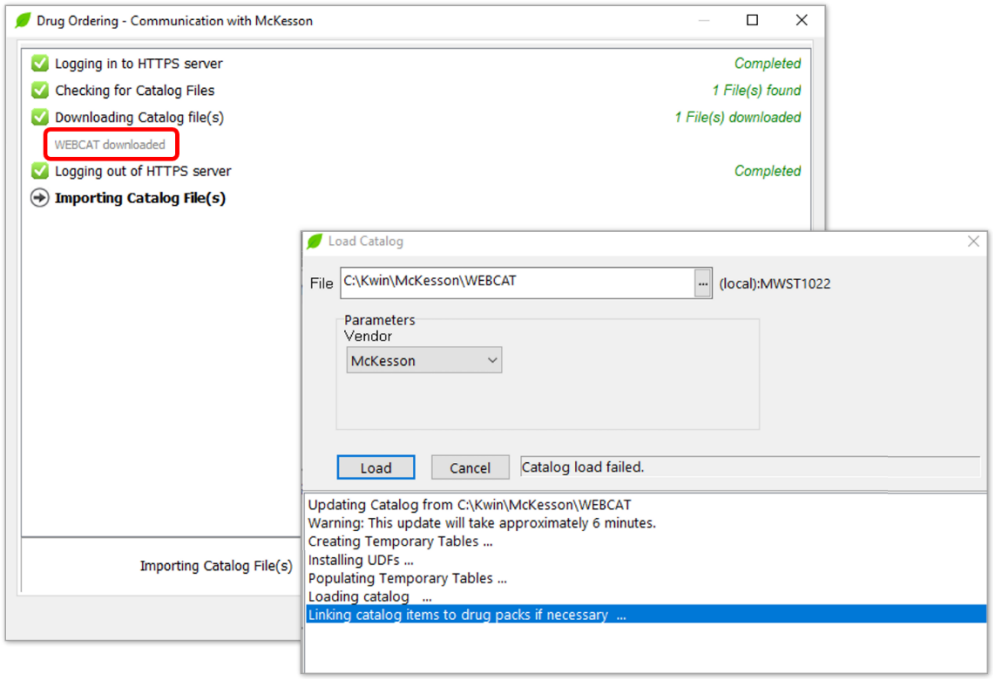

Click **OK** then **Finish** and repeat steps 1-3 after couple of minutes.

**You should repeat these steps at not less than 1-minute intervals. If requesting is detected by McKesson to be too frequent, the IP address may automatically be blocked.**

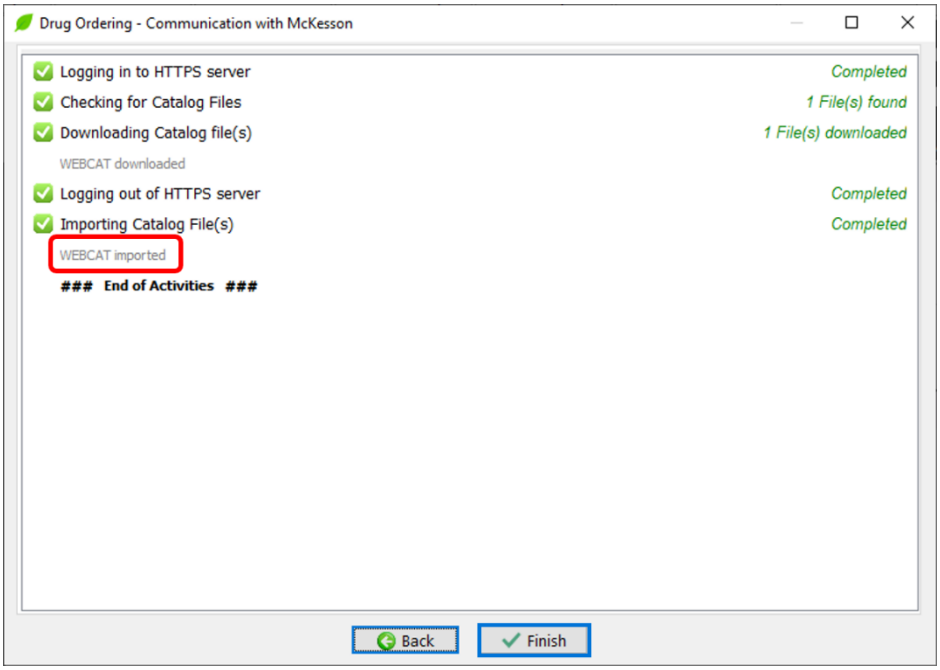



- "Catalog ready"

The process of catalog download and import starts automatically once the requested catalog is available. The **Load Catalog** screen will appear and no user intervention is required here.



When all files have been imported into the database, the information panel will show a status of **Completed**. Click **Finish** to complete the process.

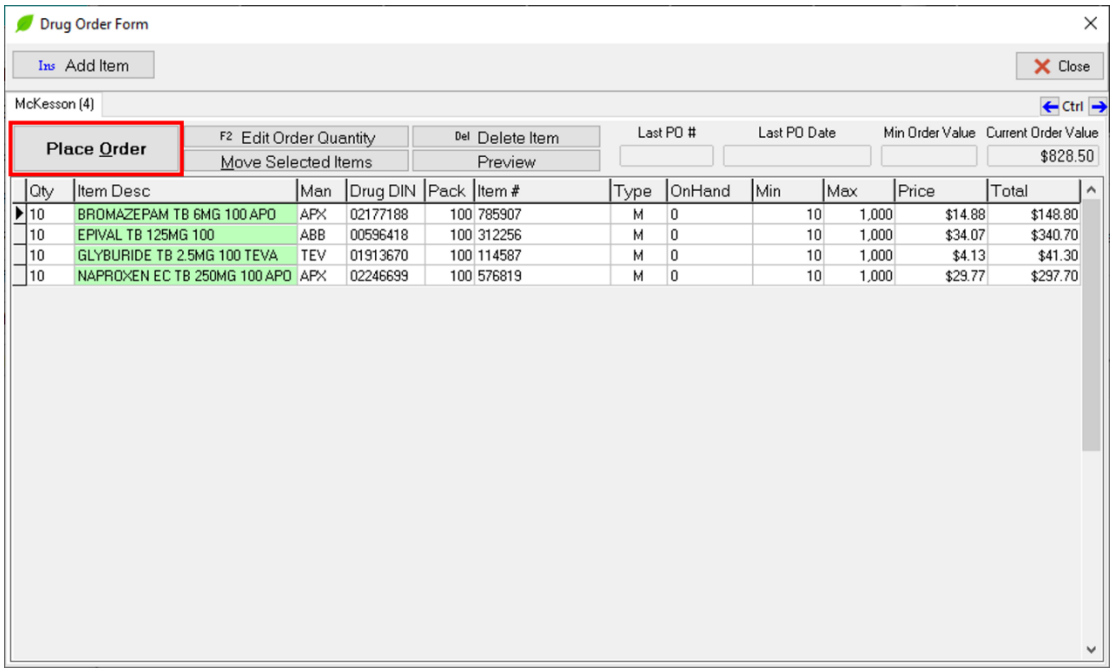


# Ordering

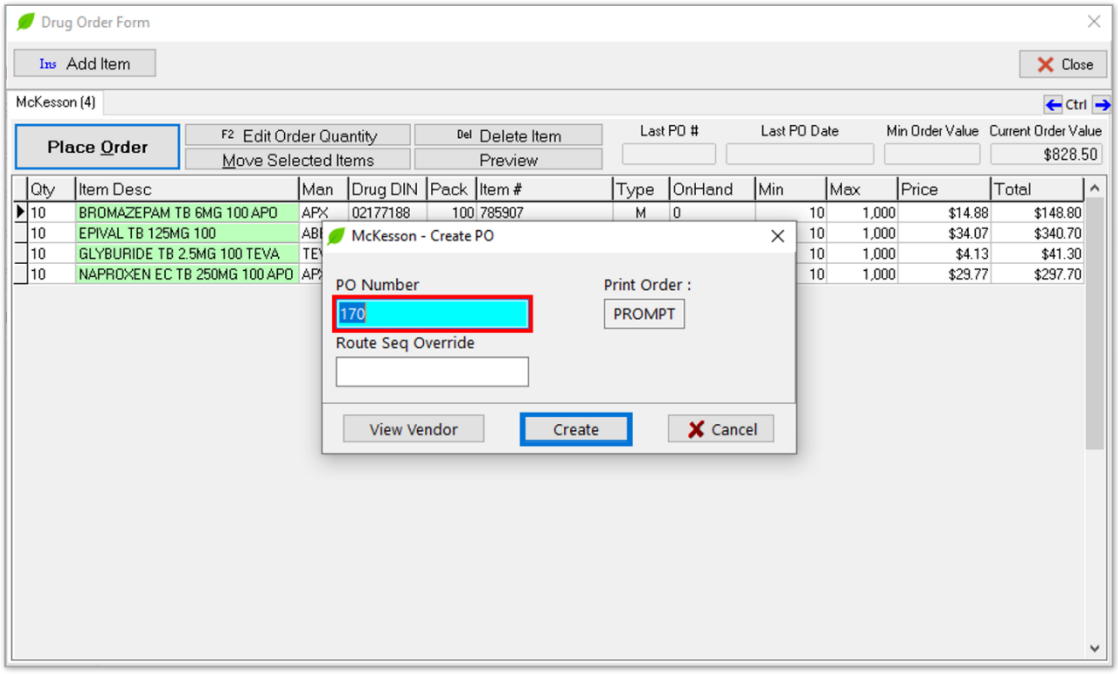
## Placing an Order in Kroll

Manual and automatic drug orders are created using normal procedure. If you are unsure how to create a drug order, see the Vendor Configuration, Ordering, and Receiving user guide for more information.

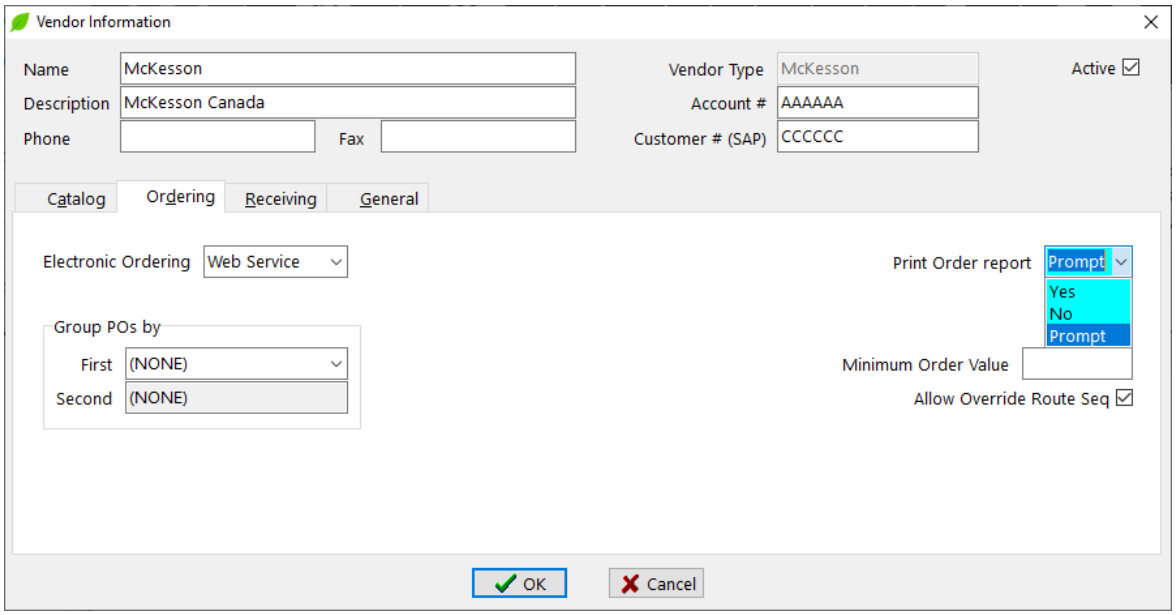
1. Click **Place Order** in the **Drug Order Form**.



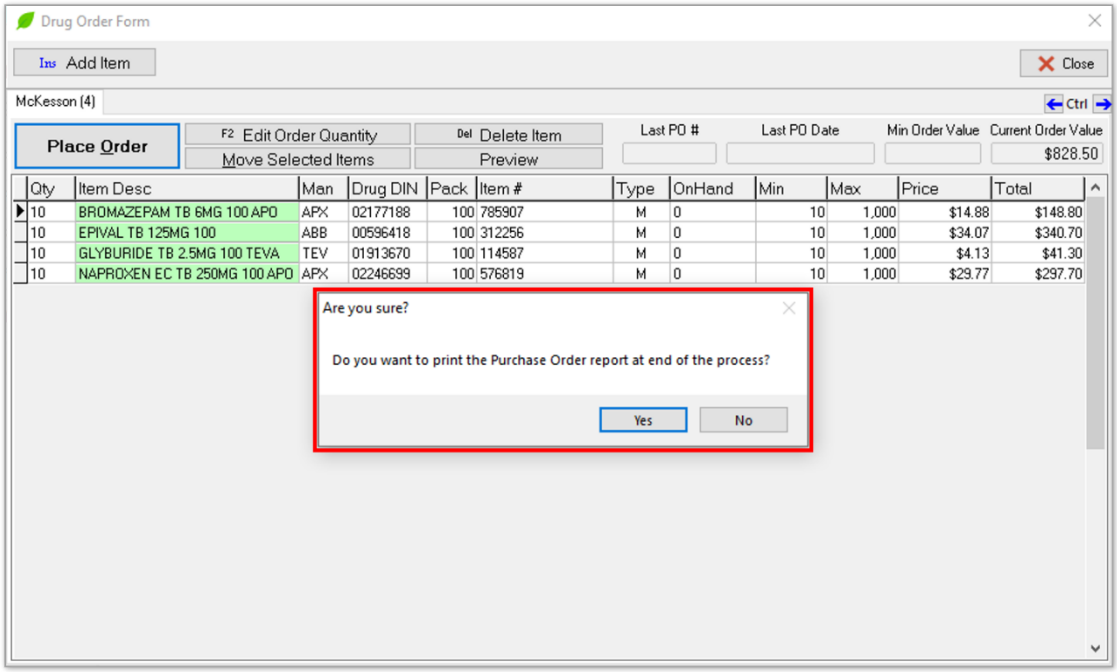
2. The **McKesson – Create PO** form will appear. Enter a PO number if one has not been assigned by the Kroll system and click **Create**.



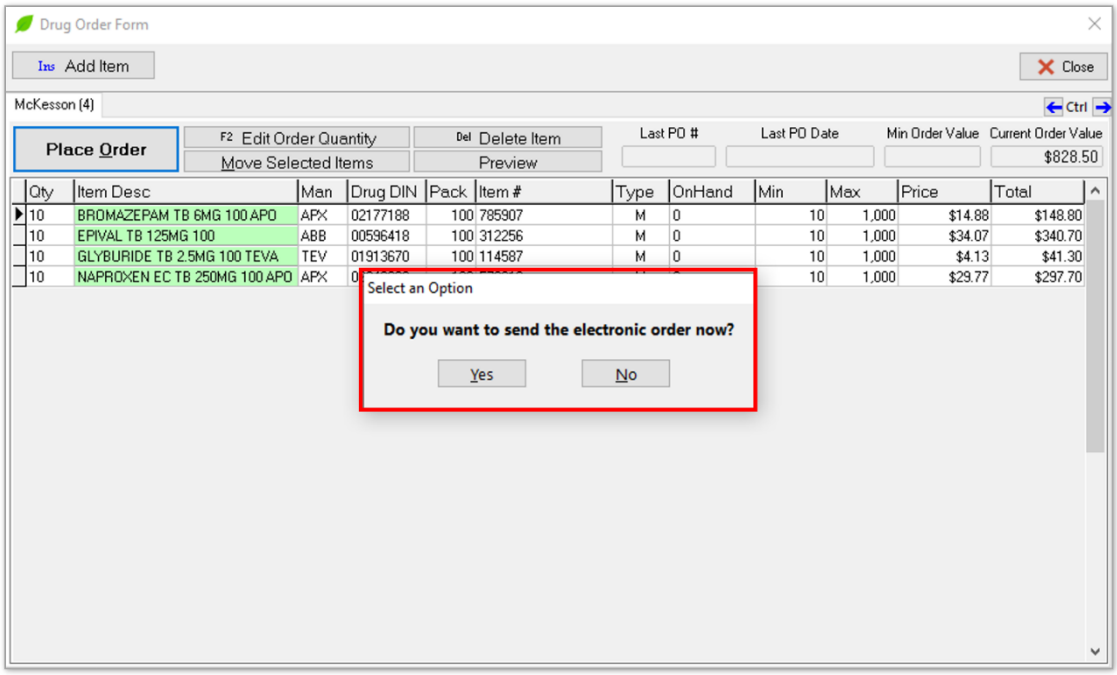

3. Depending on vendor settings, the Purchase Order prompt will appear or not.



If the “Print Order report” option is set to “Prompt” then you will be asked if you want to print the report or not at the end of the process.



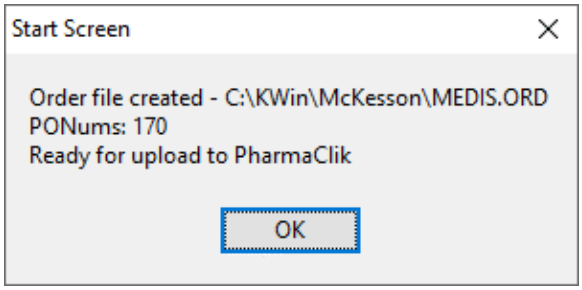

4. A prompt will appear asking if you want to send the electronic order now. Click **Yes** to send it now or **No** if you want to send it later. If you select **No**, proceed to the next steps when you are ready to send the order.



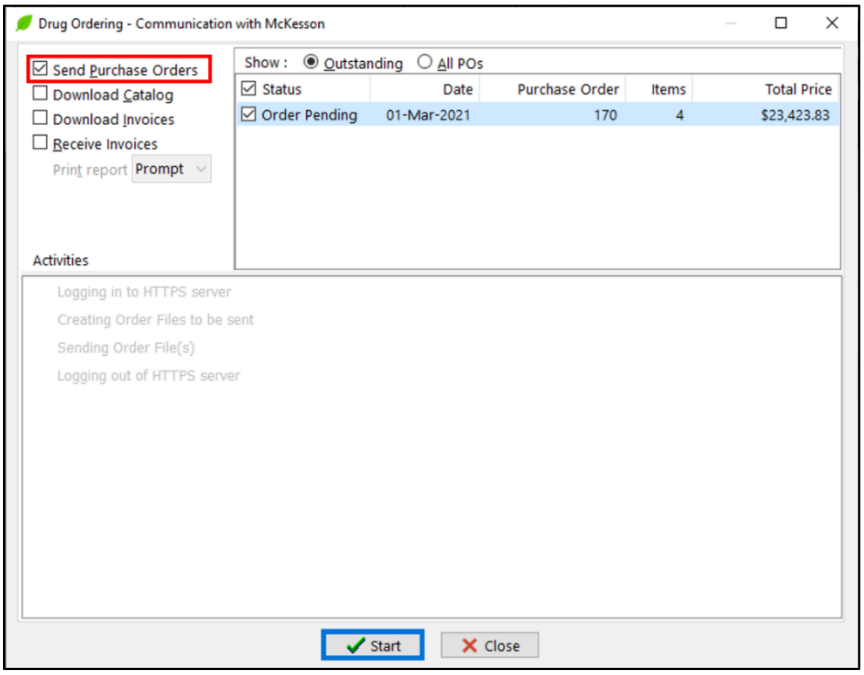
**NOTE 1**:

Answering "**No**" will place the order into **Pending Orders** so that it can be sent at a later stage from Utilities > Drug Ordering > Communicate with > McKesson > Communicate".

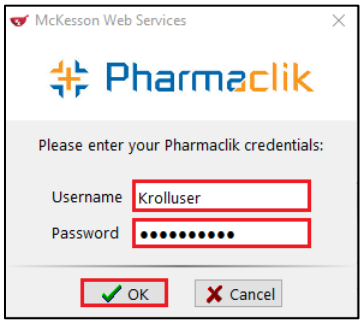
**NOTE 2**: The 'Order file created' message no longer appears when placing a drug order since there is no need to upload the file on Pharmaclik.




5. The **Drug Ordering – Communication with McKesson** form will appear, displaying all orders associated with the vendor. Select the order(s) you want to send and click **Start**.

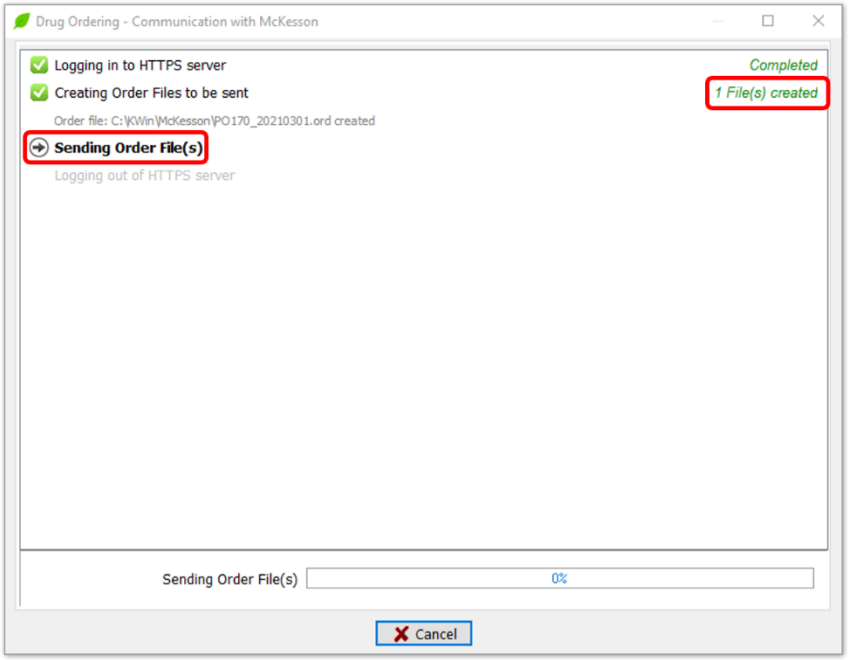


- If you have NOT already entered your McKesson username and password in the **Vendor Information** screen as was suggested in the Setup section, you will be prompted for both your remote username and password. Enter these credentials and click **OK**.



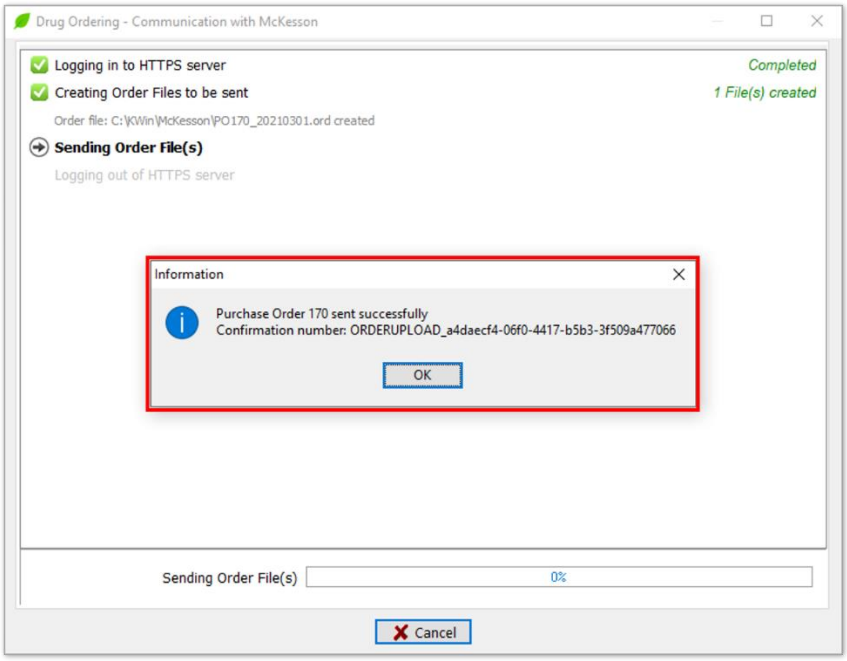

This is a one-time task; you will not be prompted for user credentials when submitting subsequent orders. If you enter an invalid username or password, the **McKesson Web Services** prompt will appear again, allowing you to enter your correct credentials.

6. As the purchase order is being sent to the vendor, the Activities portion of the screen will begin to populate with the status of actions being taken.



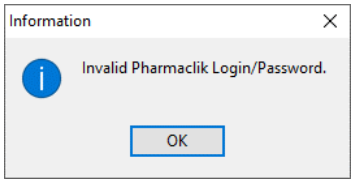
7. Kroll system will automatically transmit the order to McKesson Server. A message will appear indicating the purchase order was sent successfully and a confirmation number will be displayed just for your reference.

The confirmation number is not an order id but a service request reference.

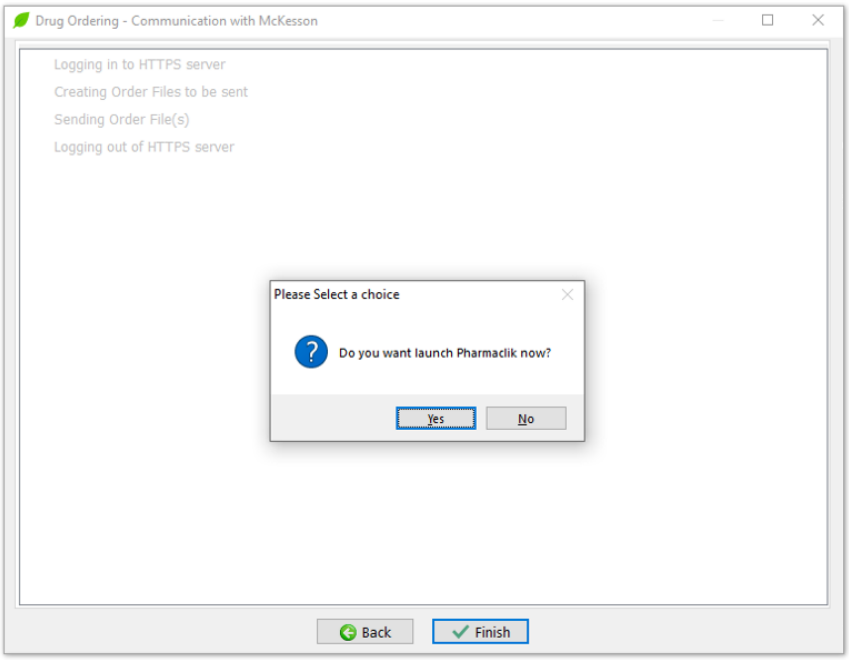



8. Click **OK**.

**NOTE:** If the transmission was not successful (e.g., due to an invalid login or password), an error will appear informing you of the problem. Contact McKesson Customer Service for instructions on how to proceed.



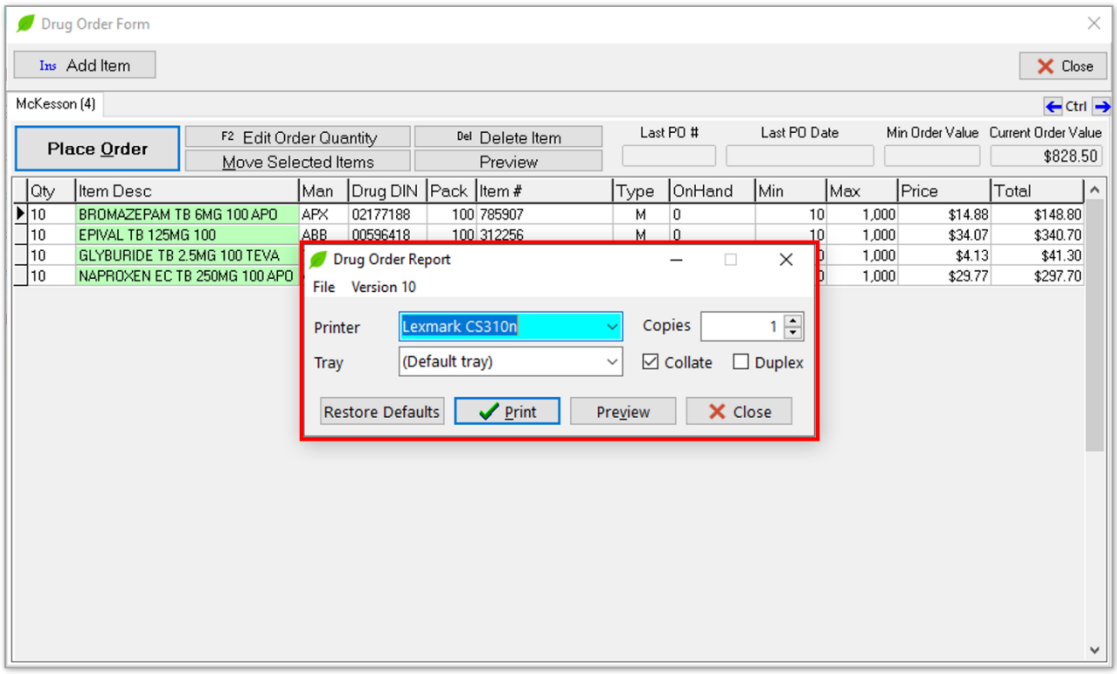
9. A prompt will appear asking if you want to launch Pharmaclik. Select **Yes**.



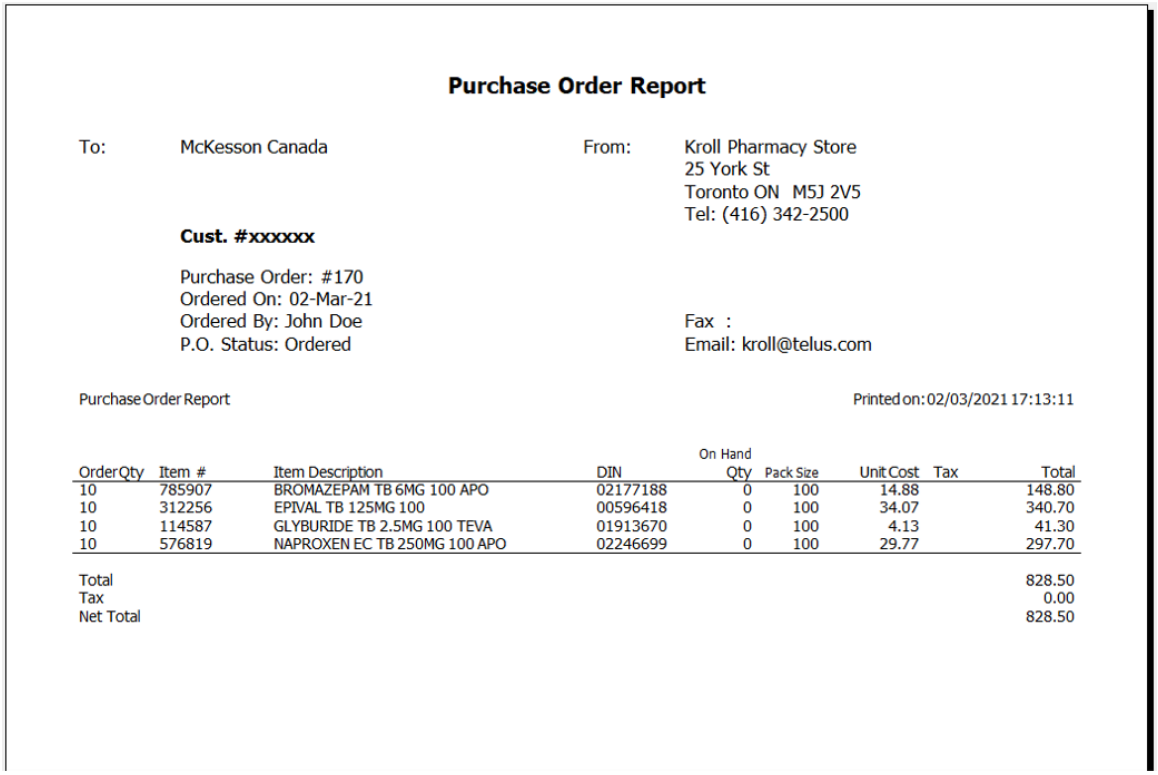

10. The McKesson Pharmaclik website will launch. Enter your login credentials and click **Login**.


11. Select and confirm the order you just created. If you experience any problems in this process, contact McKesson Customer Service.

12. A prompt to print the Order report will show up or not. See step 3.




13. Below is the report preview



**Purchase Order Report**

To: McKesson Canada

**Cust. #xxxxxx**

Purchase Order: #170
Ordered On: 02-Mar-21
Ordered By: John Doe
P.O. Status: Ordered

From: Kroll Pharmacy Store
25 York St
Toronto ON M5J 2V5
Tel: (416) 342-2500

Fax :
Email: kroll@telus.com

Purchase Order Report

Printed on: 02/03/2021 17:13:11

| Order Qty | Item # | Item Description | DIN | On Hand Qty | Pack Size | Unit Cost | Tax | Total |
|---|---|---|---|---|---|---|---|---|
| 10 | 785907 | BROMAZEPAM TB 6MG 100 APO | 02177188 | 0 | 100 | 14.88 | | 148.80 |
| 10 | 312256 | EPIVAL TB 125MG 100 | 00596418 | 0 | 100 | 34.07 | | 340.70 |
| 10 | 114587 | GLYBURIDE TB 2.5MG 100 TEVA | 01913670 | 0 | 100 | 4.13 | | 41.30 |
| 10 | 576819 | NAPROXEN EC TB 250MG 100 APO | 02246699 | 0 | 100 | 29.77 | | 297.70 |

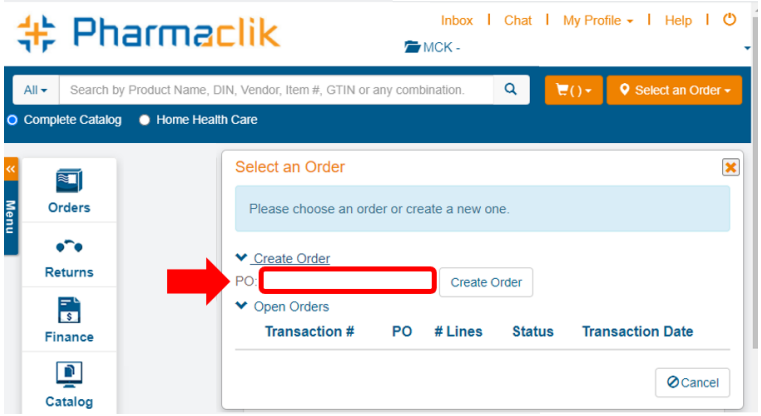
| | |
|---|---|
| Total | 828.50 |
| Tax | 0.00 |
| Net Total | 828.50 |

## Important Notes:

- Every order needs to be confirmed on the Pharmaclik website – Order Management. Narcotic orders require also a pharmacist's signature.
- On McKesson's checkout process where the order will be confirmed, the user has the opportunity to add, modify or delete items on the order.
- Any exclusion, for example: deleting a product from the order, will cause a **discrepancy** between the existent order on Kroll and the order placed on Pharmaclik. This discrepancy will create issues on the "Receiving Process".
- Any modification, for example: changing the order quantity or units, will be handle properly on the "Receiving Process" as long the order quantity is NOT adjusted to zero. Changing the quantity or unit to zero will force Pharmaclik to exclude the product from the order and it will cause a **discrepancy** between the existent order on Kroll and the order placed on Pharmaclik.
- Any addition, for example: adding an item that does not exist on the order on Kroll, should be handle properly on the "Receiving Process".

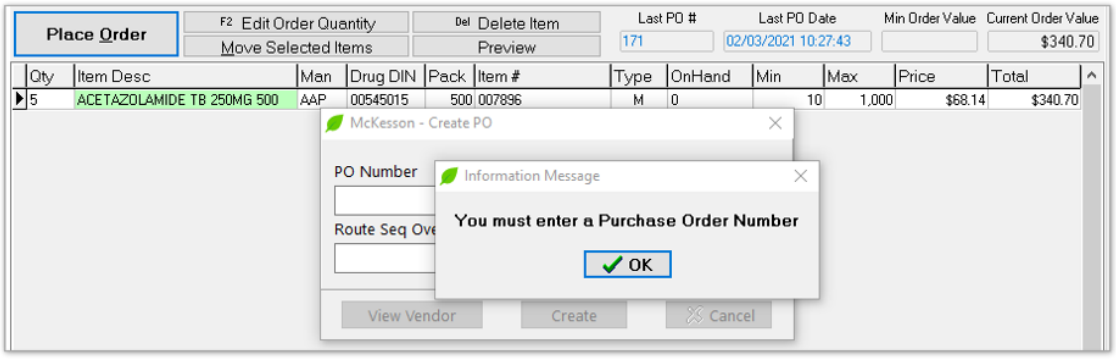
# Placing an Order in Pharmaclik

Placing an order in Pharmaclik is possible but strongly NOT recommended. Despite the convenience, placing an order in Pharmaclik creates discrepancies between the two systems and makes it more challenging for a pharmacy to track and control orders. See “Tracking your Orders” section.

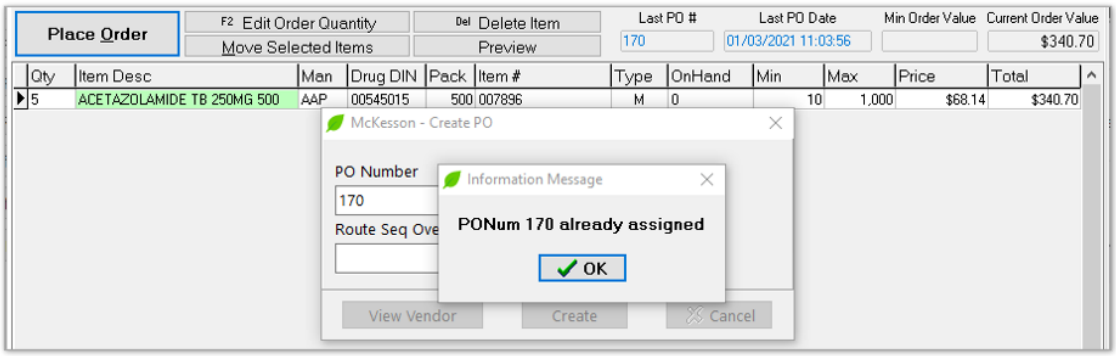



When creating an order in Pharmaclik, the PO number (Purchase Order number) is **NOT** required. In other words, you can leave this field blank.

In Kroll system, the PO number is an **essential** field to identify an Order. As you can see below, it is a mandatory field and cannot be duplicated.



There is a logic in Kroll system to avoid duplications.




So, if, for any reason, you cannot return to Kroll to place an order and transmit it, then you can create an order in Pharmaclik but **ALWAYS** enter the PO number and make sure it is unique:

- The PO number was never used before and
- The PO number will never be used again.

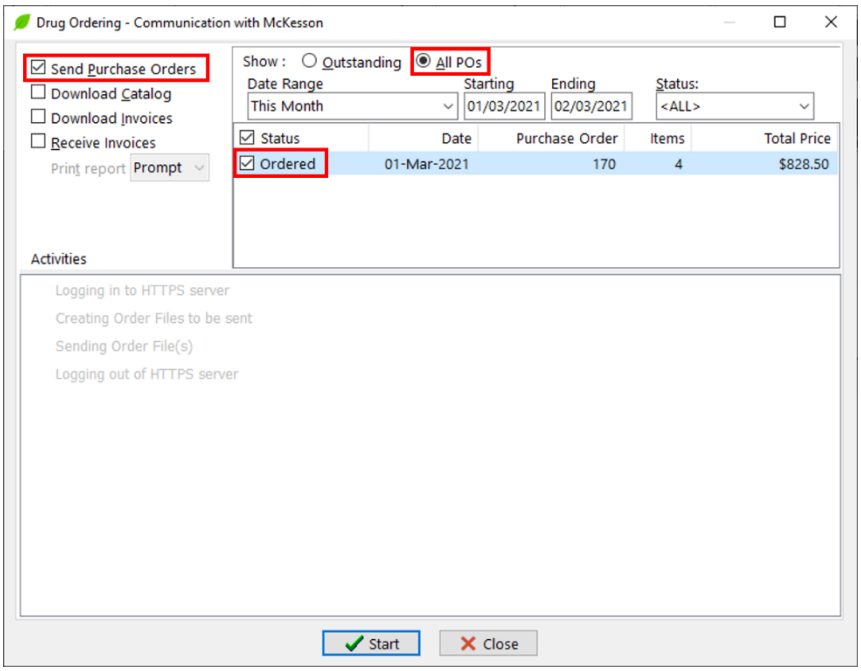
# Resending an Order

This option is used when the file **did not** transmit properly to the vendor or needs to be resent, see the Vendor Configuration, Ordering, and Receiving user guide for more information.

**NOTE:** McKesson Servers **DO NOT** prevent duplicate orders. In other words, a same identical order can be resubmitted and if not desired will cause a **double order**.

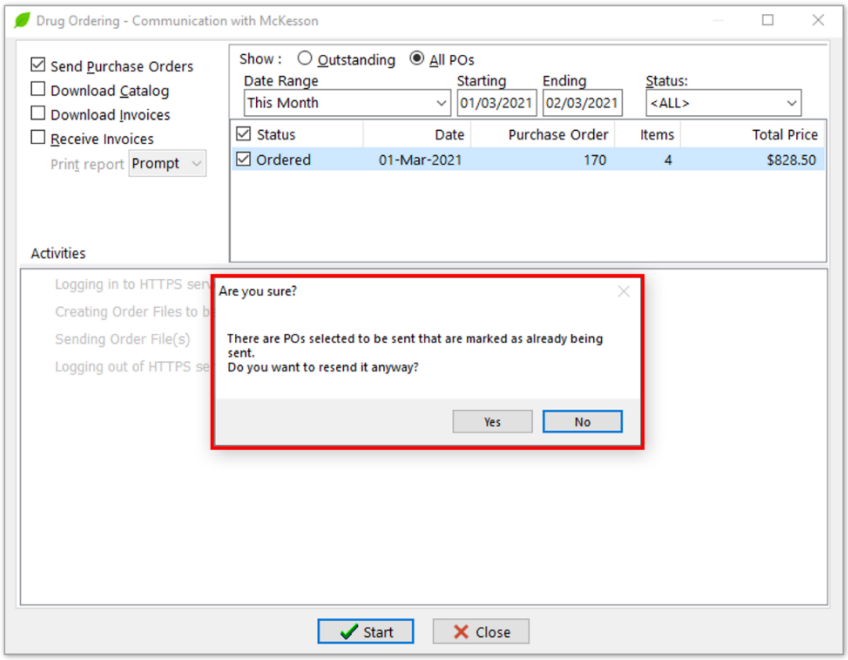
1. Go to Utilities > Drug Ordering > Communicate with > McKesson > Communicate.

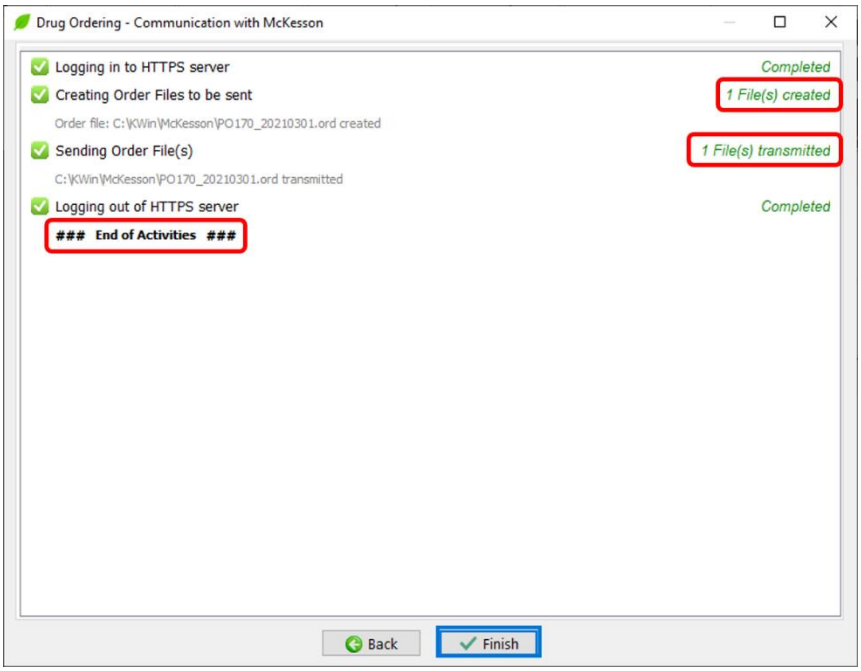
2. Place a checkmark next to Send Purchase Orders. Click All POs and place a checkmark next to the PO(s) than need to be resent. You may use the "Date range" control to help find the order.




3. Click **Start** or press **Enter** on the keyboard to resend the PO(s).

4. Answer **Yes** to the prompt below.



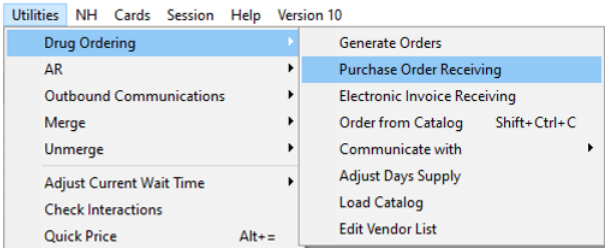




Click **Finish** or press **Enter** on the keyboard to close the communication screen. Click **Back** to start another communication with McKesson.

# Tracking your Orders

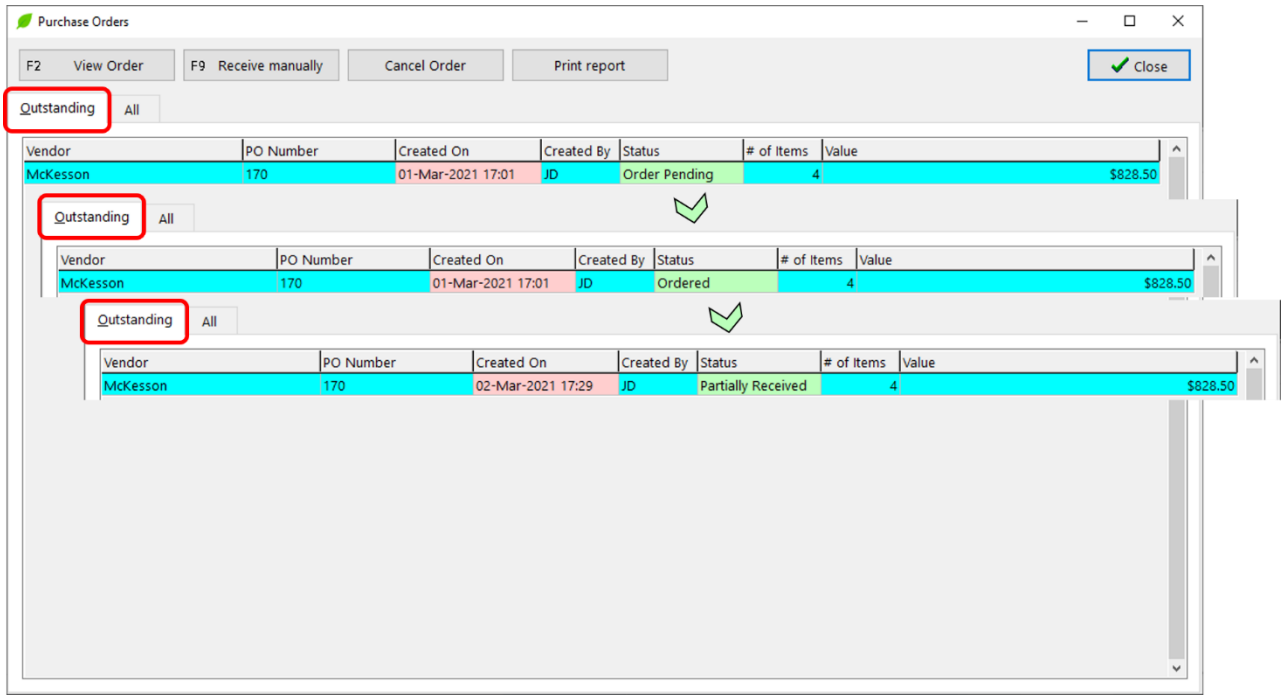
The Purchase Order screen shows all orders created in the Kroll system. The screen's primary purpose is to show your orders' status and allow you to track all the states in which your order goes through.

Go to Utilities > Drug Ordering > Purchase Order Receiving.



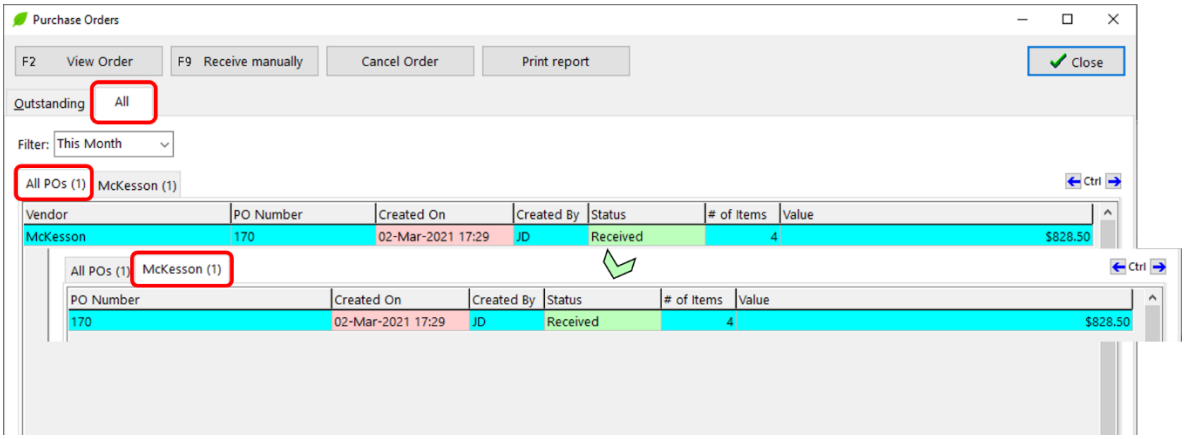

The "Outstanding" Tab shows:

- Status – **Order Pending**. Orders created but **not** transmitted to McKesson.
- Status – **Ordered**. Orders created and transmitted to McKesson.
- Status – **Partially Received**. Orders created, transmitted to McKesson and received some electronic invoices related to the order but **not all** invoices. The Kroll system is waiting to receive more invoices.



## Important Notes:

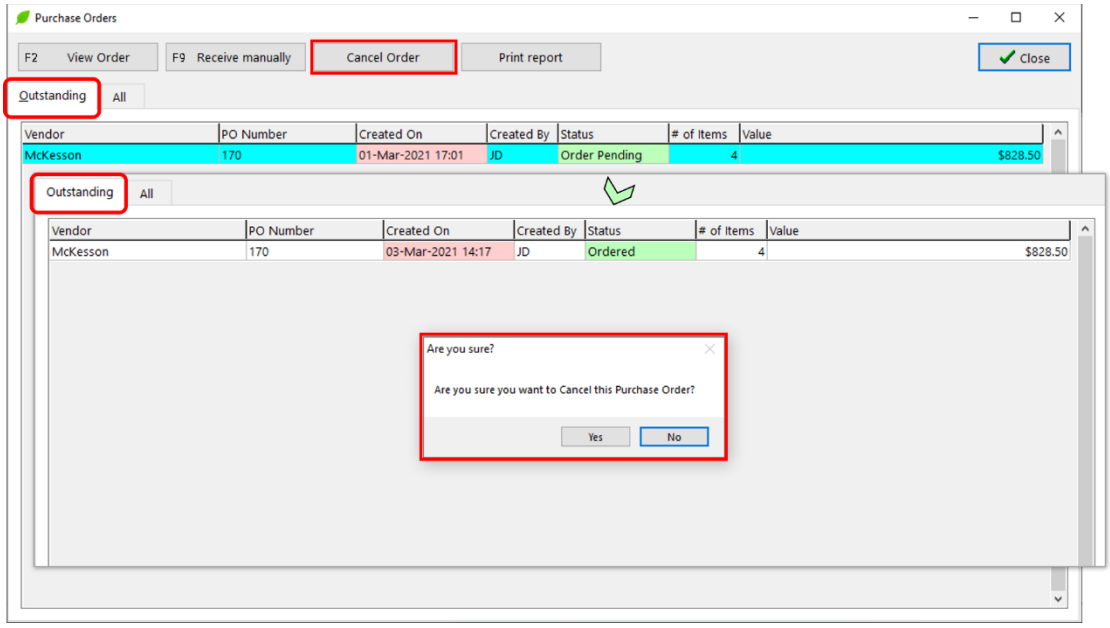
- Orders placed directly on Pharmaclik **do not show** and cannot be tracked on this screen.
- Orders fully received (Status – Received) do not show on “Outstanding” Tab. It shows up on “All” Tab in both “All POs” and “McKesson” Tabs.



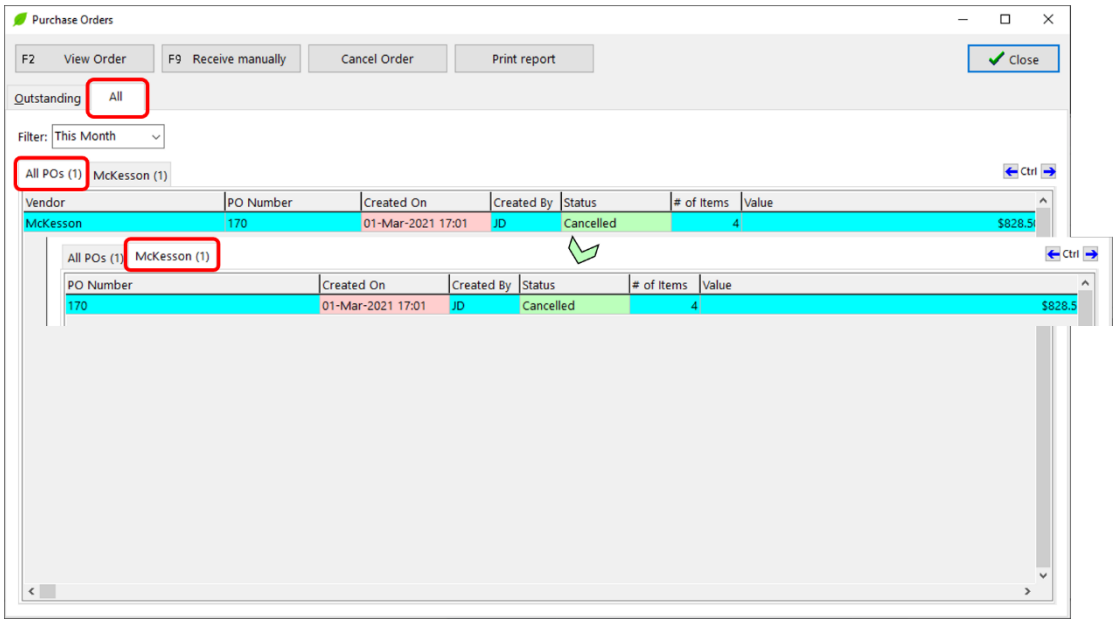
# Cancel an Order

The Purchase Order screen also allows you to cancel your orders.

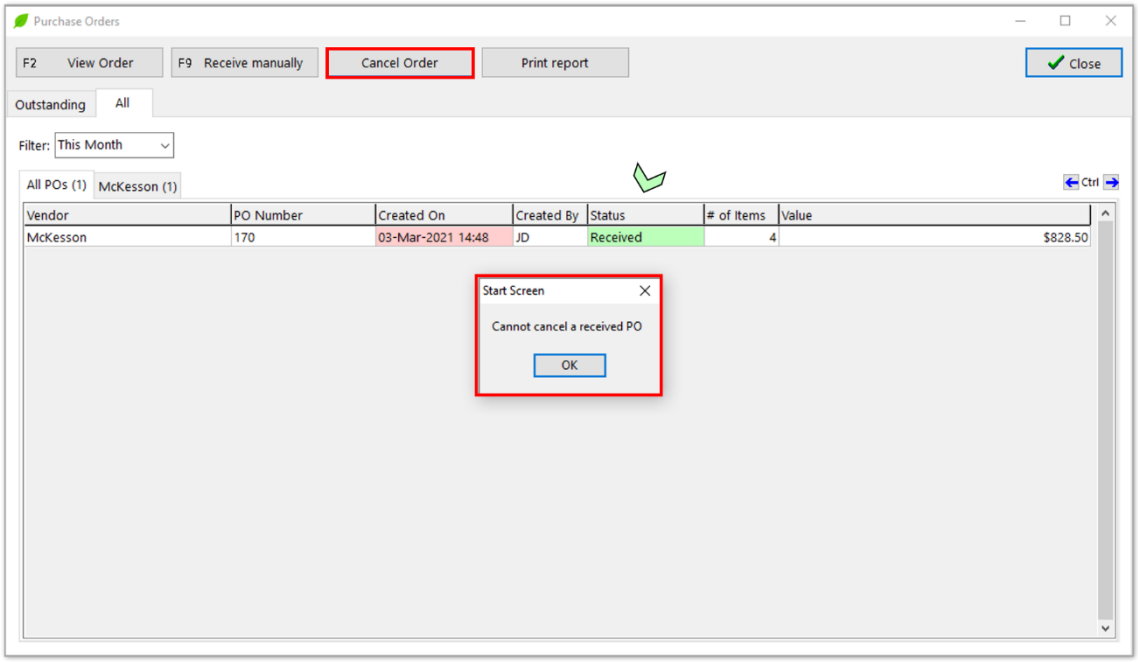
Go to **Utilities** > **Drug Ordering** > **Purchase Order Receiving**. Select the order you want to cancel and click on the “Cancel Order” button. Confirm your desire to cancel the select order by clicking **Yes**.




The canceled order will disappear from the ‘Outstanding’ Tab and can be viewed on ‘Al’ Tab in both ‘All POs’ and ‘McKesson’ Tab.



Note that received orders cannot be canceled.




## Important Notes:

- The right moment to cancel an order is when it has the status **equal** "Order Pending". In other words, **before** it has been transmitted to McKesson.
- Canceling an order which was already transmitted to McKesson (status – Ordered) will only cancel it **locally**. You **MUST delete the order in Pharmaclik** to avoid it being processed by McKesson.
- If the order is canceled **only locally** and McKesson processed it, you will receive one or more electronic invoices related to the orders. The receiving process will allow you to recognize that and receive the order even with the orders status equal to "Canceled." See receiving section for more information.

# Receiving

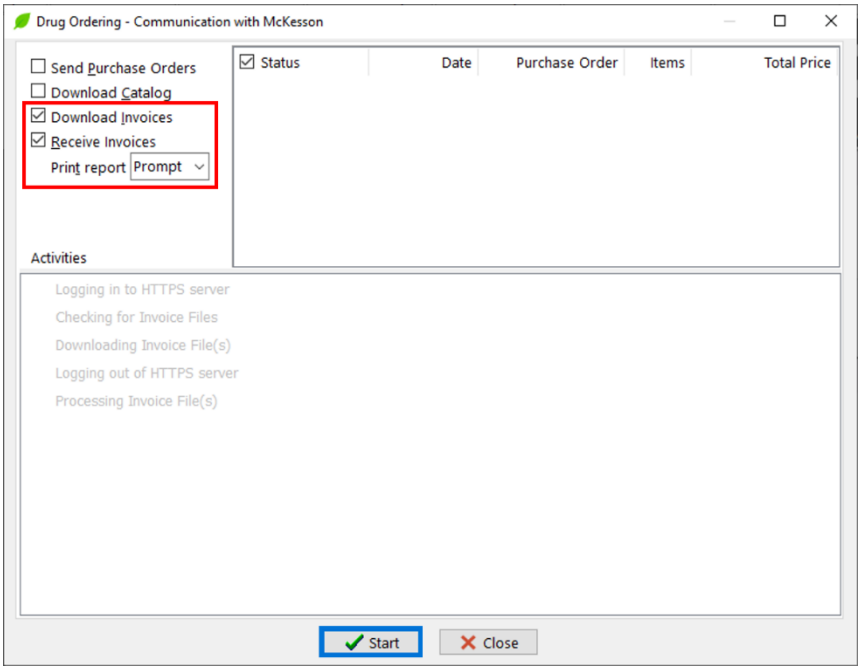
This section outlines the process for receiving invoice files. When a pharmacy physically receives a drug order from McKesson, the order must be received into the Kroll system to update the **On Hand** values and **Pricing**.

- Customer # (SAP) is required for invoice download from **McKesson Web Services**.

The process of receiving invoice files consists of two tasks:

- Checking and downloading new invoice files;
- Receiving and Processing invoice files not received yet.

Navigate to Utilities > Drug Ordering > Communicate with > McKesson > Communicate.
The **Drug Ordering – Communication with McKesson** form will appear:



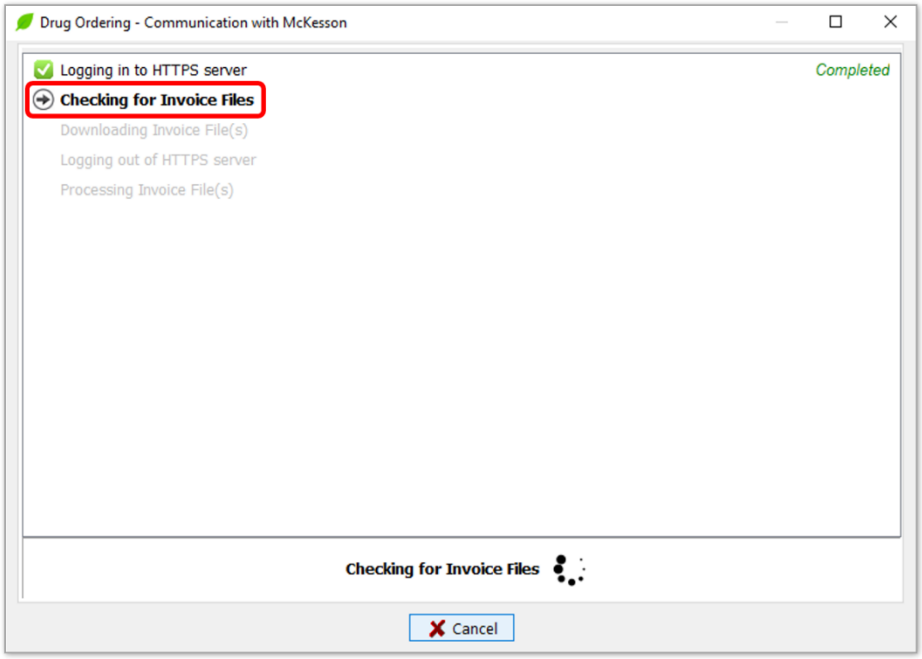

These two tasks can be executed simultaneously, one after the other, or they can be completed one at a time in different moments.

When both options are checked, downloading invoice files and receiving invoice files are done in sequence. The receiving or processing invoice files task is executed after logging out of McKesson's server.

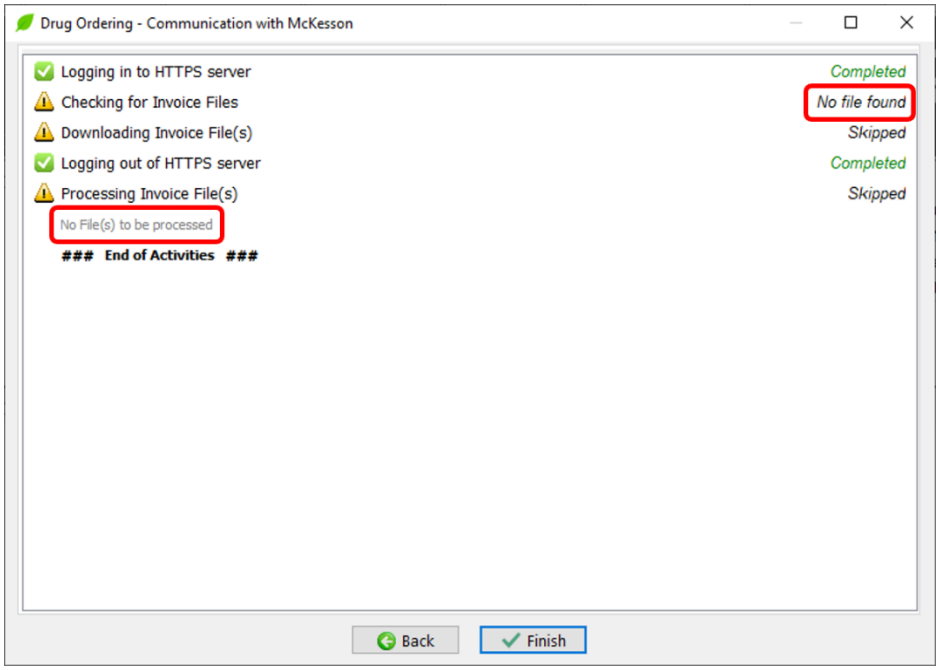
Once the “Download Invoices” option is checked, you will be able to download one or more new invoice files available on McKesson's server.

Check both options and click **Start** or press **Enter** on the keyboard to check for invoice files.

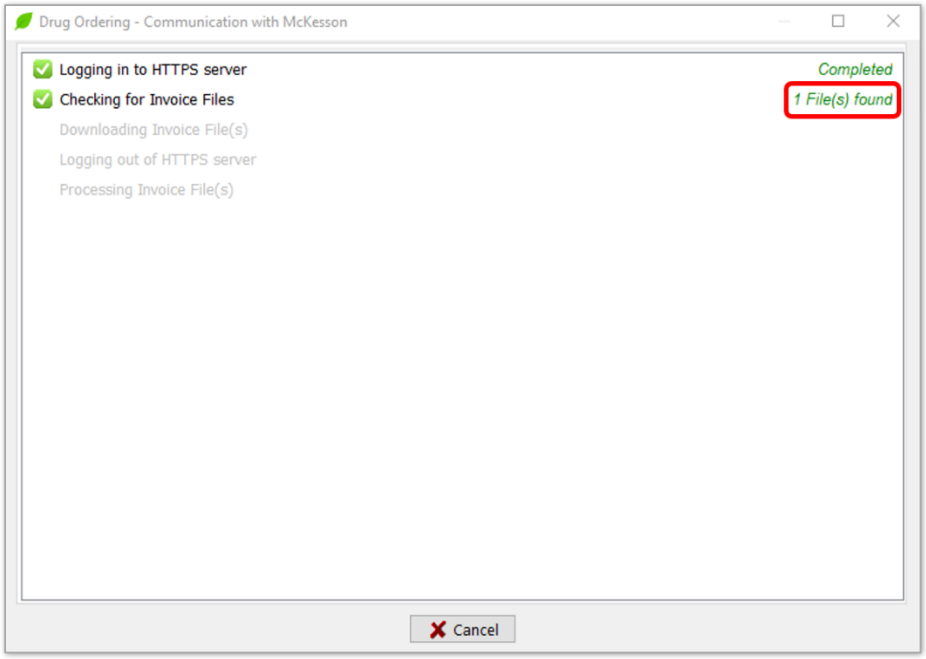
Like other tasks, the information panel will show when the checking for invoice files task is in progress.



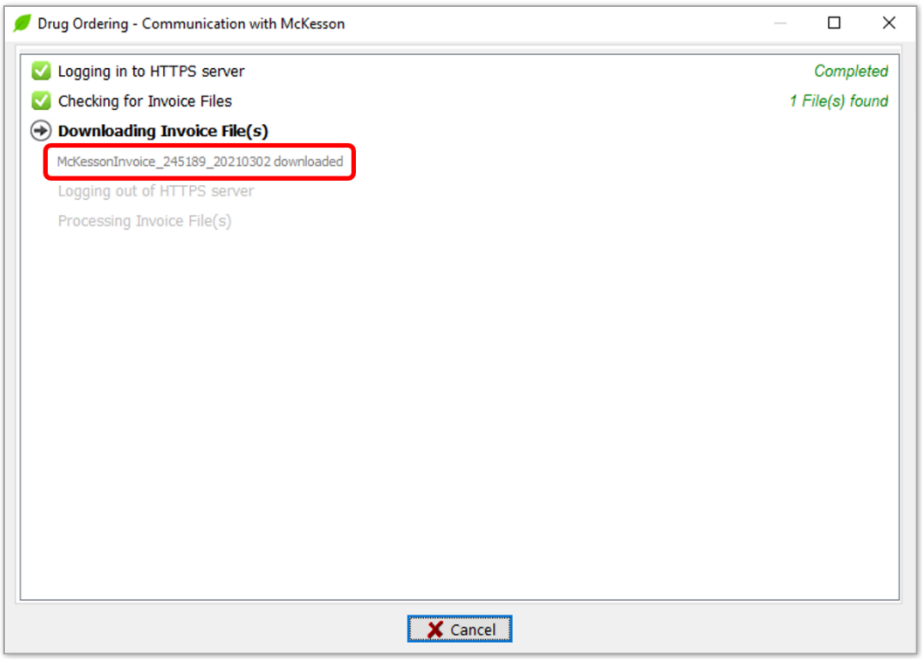

When checking for invoice files task is complete, the information panel will show the number of invoice files found. If found **no** files, the downloading invoice files task will be skipped since there are **no** files to download. Later, it will skip the processing invoice files task as well.



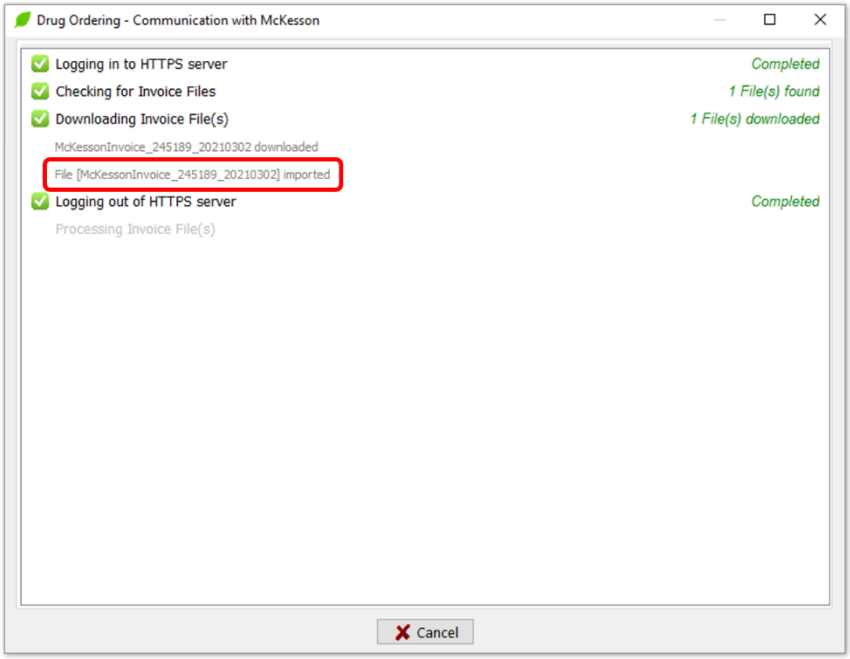
If found invoice files during the checking for invoice files task, the downloading invoice files activity will automatically initiate.



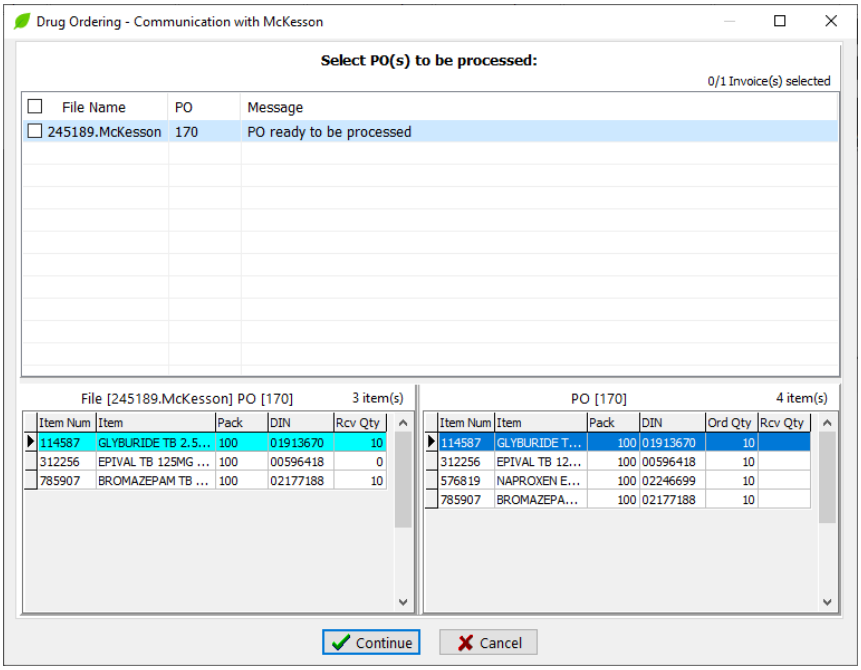

As soon as each file is downloaded, the information panel will show the corresponding filename.



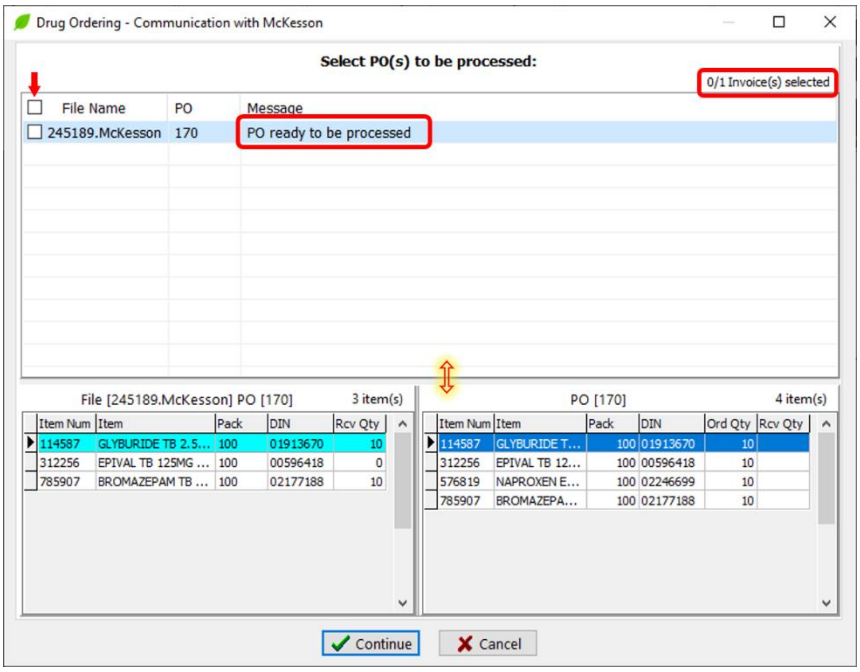
The invoice files will be temporarily saved in the designated vendor folder. The invoices will be kept in this folder until they are imported into the Kroll system.




If invoice files were found and downloaded, the communication process would try to match the invoice file's information to Kroll's purchase order. When the process finds a match between an invoice file and a Kroll PO, you will see a screen similar to the one below:

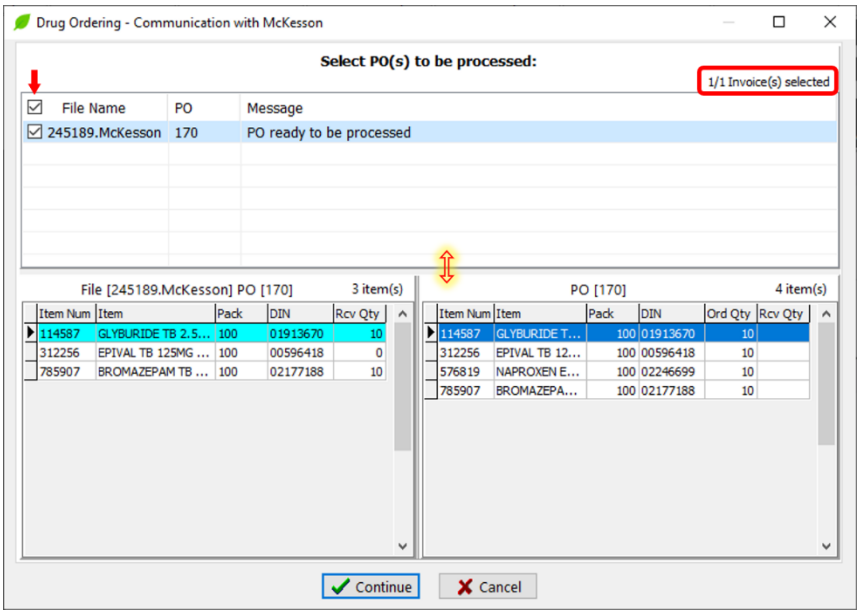


This screen contains a top panel and a bottom panel. The top panel shows a list of downloaded invoice files with associated Purchase Order numbers. As well, an information message is shown to the left of the PO number; this message will help you decide which file to process.

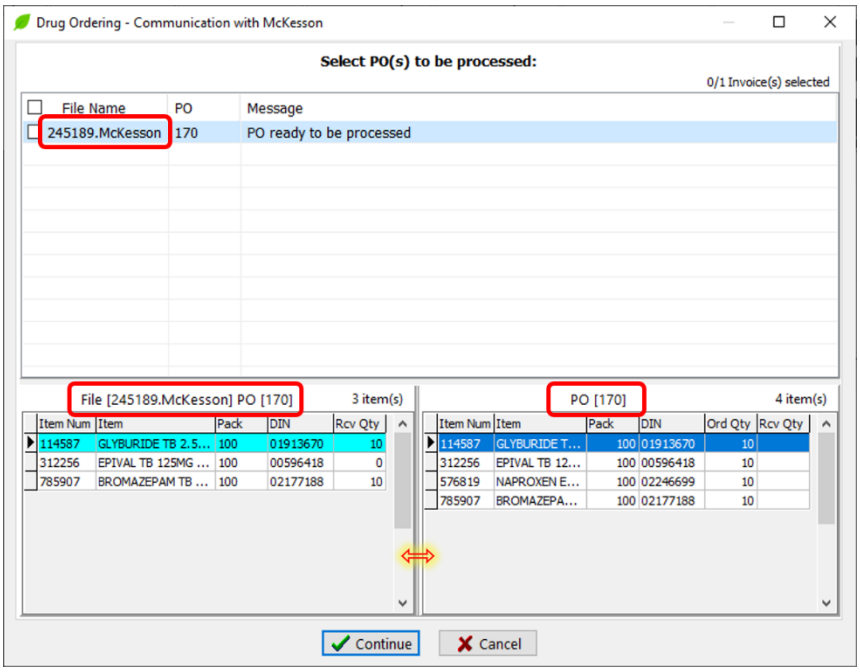



There is a checkbox on the upper left-hand side of the screen that helps you select or deselect all invoice files/POs in the list. An indicator on the upper right-hand side indicates x of y PO(s) have been selected.

Note that you can resize the top and bottom panel at any time.

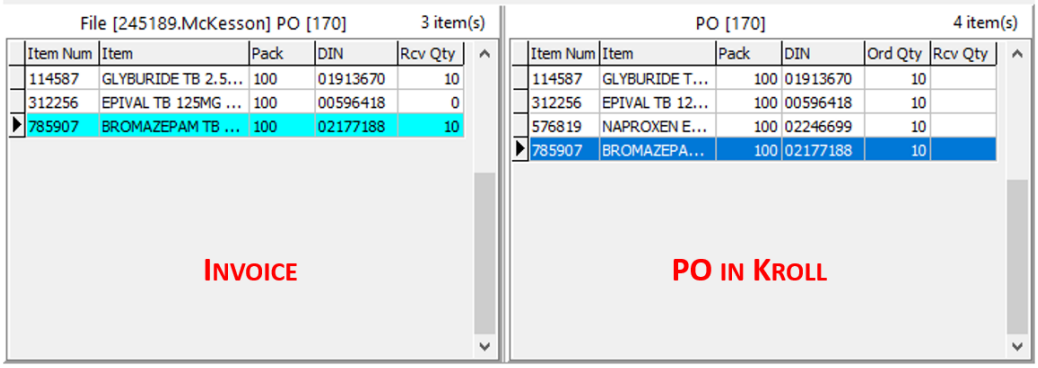


The bottom panel shows the left and right grid; the information displayed is related to one of the invoice files shown in the top panel. The left grid shows the information contained in the selected invoice file. The right grid shows all the items within a PO in Kroll. You can resize the panels to show more or less information.




The invoice file on the left (invoice file number 245189) is associated with PO 170 on the right in the above screen. The invoice file contains only three items. The idea is to allow you to see the information inside the invoice file compared to the PO's information in Kroll system before the file is processed.

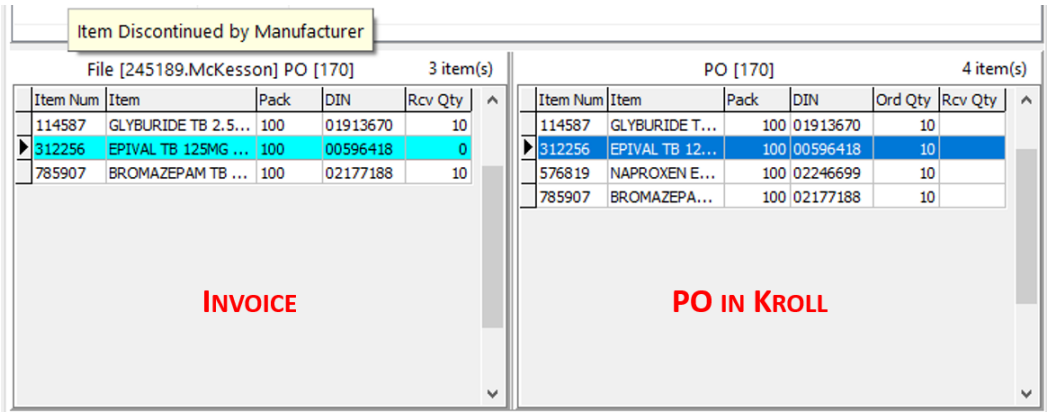
Clicking on any item on either side of the grid will highlight the opposite side's corresponding item if available.




The right-hand grid above, item 785907 (BROMAZEPAM) highlighted, was ordered for ten packs (Ord Qty column) in Kroll. Comparing with the left grid, we can see that the received quantity (Rcv Qty column) is also ten packs, which means everything ordered was received.

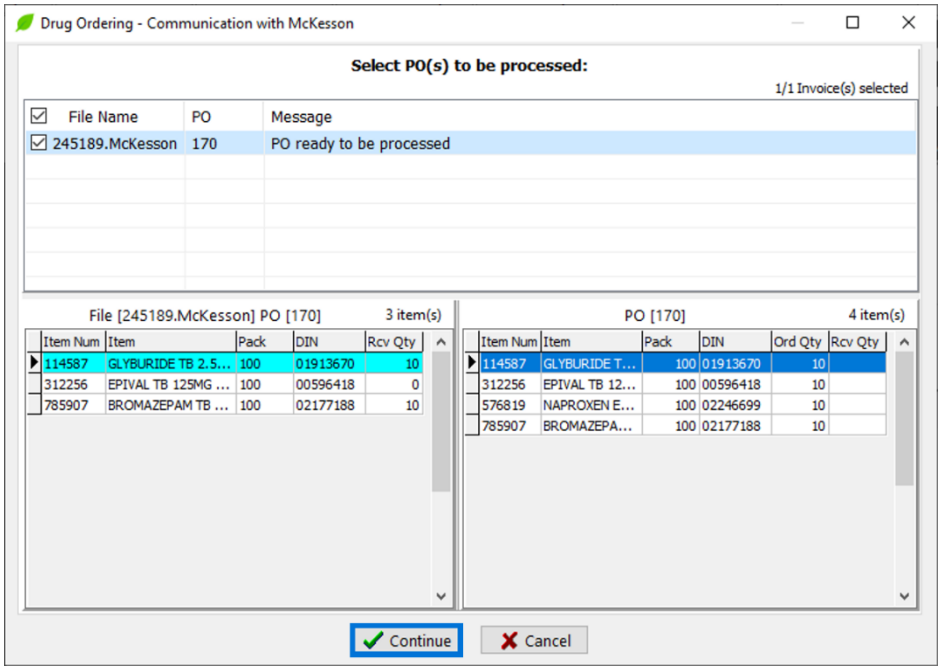
Item 312256 (EPIVAL) was ordered for ten packs, but the invoice file indicates that the Manufacturer discontinues it, and nothing was shipped.

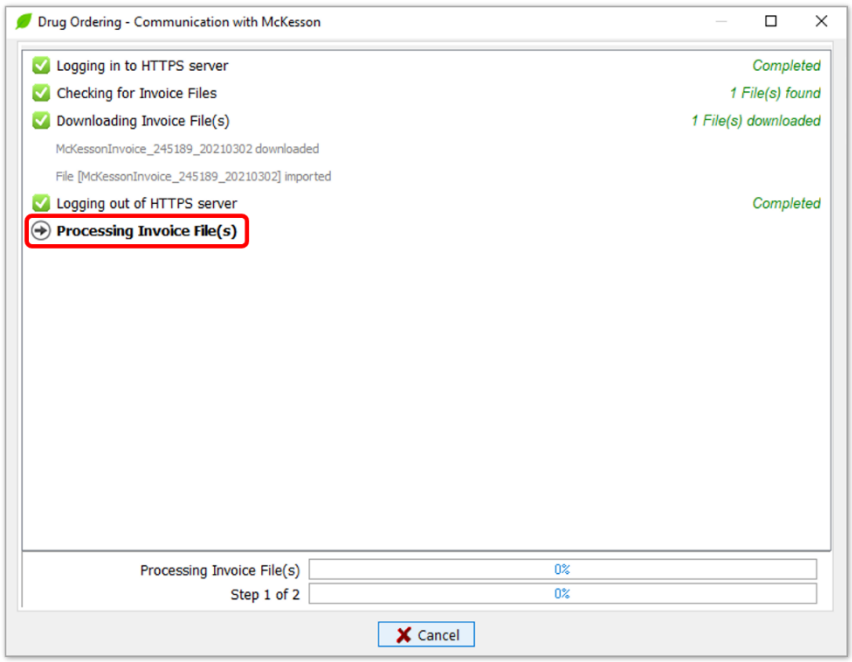
Take note of the floating yellow message.




Note that the invoice file only contains three items; however, the Kroll PO includes four items. At the end of the process, PO 170 will be **partially received**. Kroll system will wait for another invoice containing the missing item 576819 (NAPROXEN).

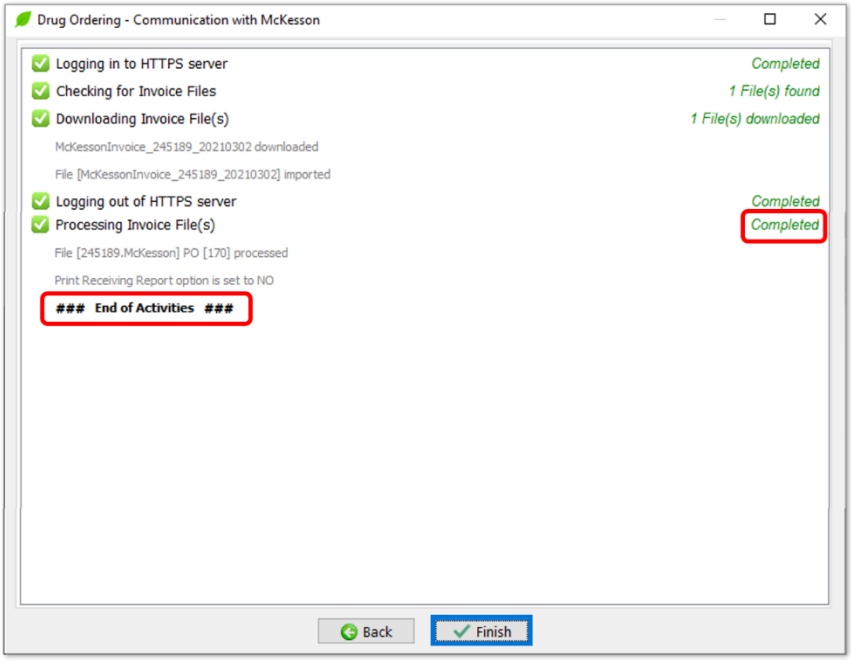
Select the invoice that needs to be received and click **Continue** to <u>process</u> the downloaded invoice files.



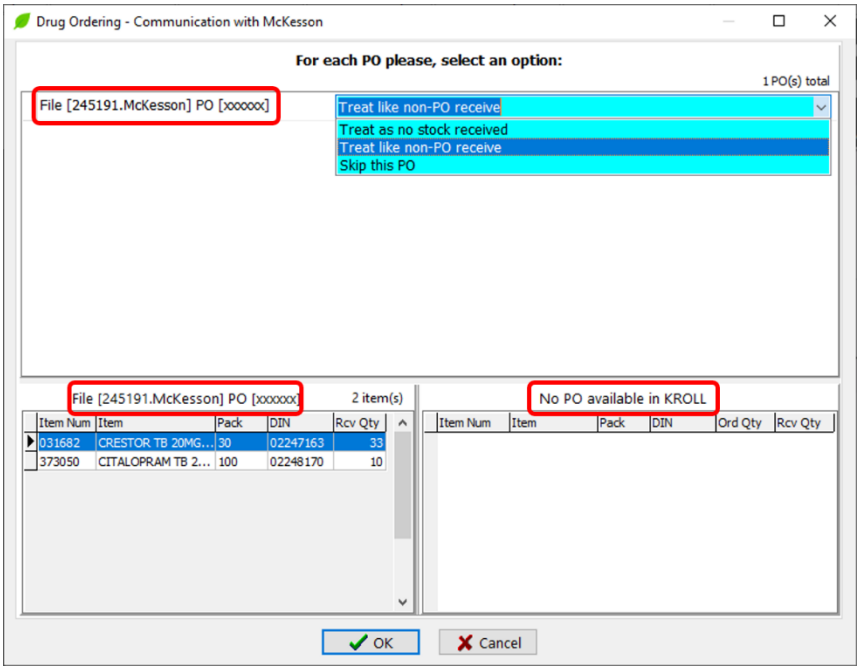



When the Processing Invoice File(s) task is complete, the status will show as Completed, and the information panel will show the message "### **End of Activities** ###." Two new buttons, Back and Finish, will appear at the bottom of the communication screen to indicate that communication has finished.

Click **Finish** or press **Enter** on the keyboard to close the communication screen. Click **Back** to start another communication with McKesson.



When the system does not find a matching PO in Kroll, you must decide what to do with the invoice. **This happens only for orders placed directly in Pharmaclik**. You will see a screen similar to the one below.




There are three options to choose from:

## Treat as no stock received

This option will receive the invoice file, taking into consideration that **no** equivalent PO exists in Kroll; however, on-hand quantities will **NOT be updated**; only catalog prices will be updated, if necessary. This option should be used when an order was placed outside of the Kroll system for items that do not have inventory and prices monitored within Kroll (e.g., OTC items).

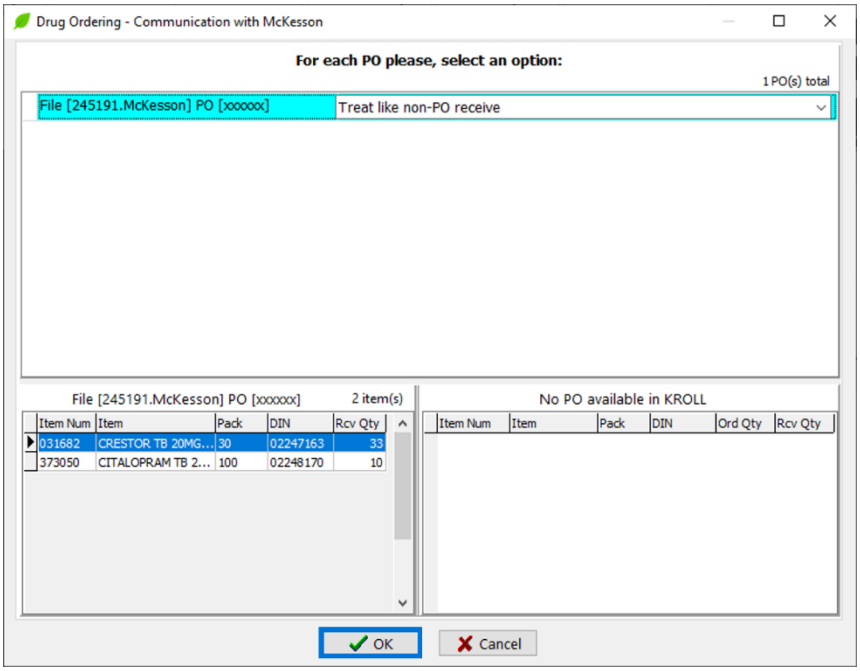
## Treat like non-PO receive

This option will receive the invoice file, taking into consideration that **no** equivalent PO exits in Kroll, and the process **will update** the on-hand quantity and prices for associated drug packs, if available. This option should be used when an order was placed outside of the Kroll system for items that have inventory and prices monitored within Kroll (e.g. an order placed directly on Pharmaclik).

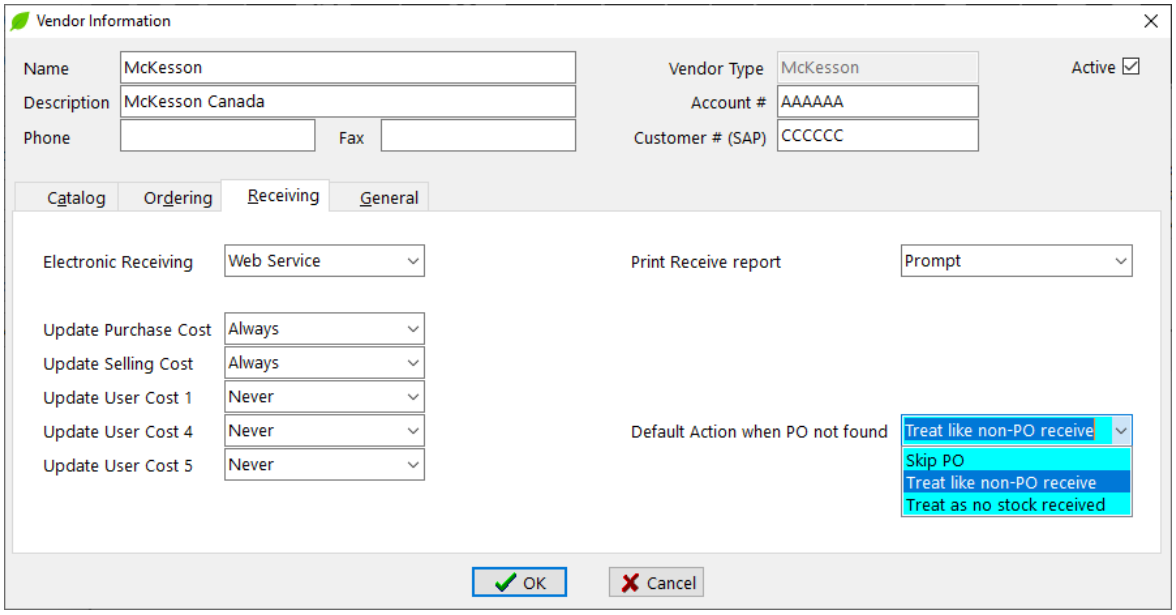
## Skip this PO

This option means the invoice file will not be processed and will be ignored. Please, read “Important Notes” section for more information.

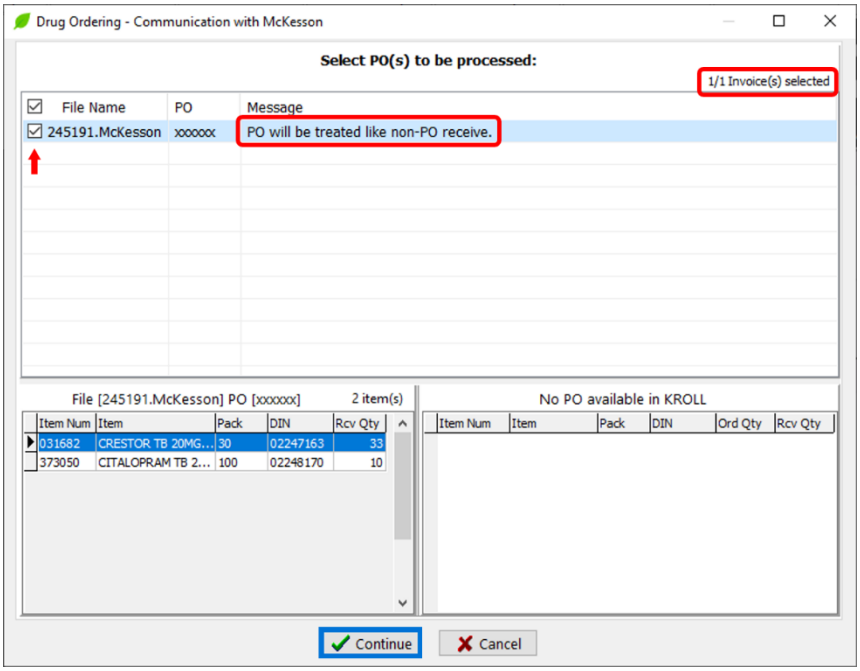
You can use the information displayed on the bottom panel's left grid to help you make the decision. Once the decision is made, click **OK** to continue.



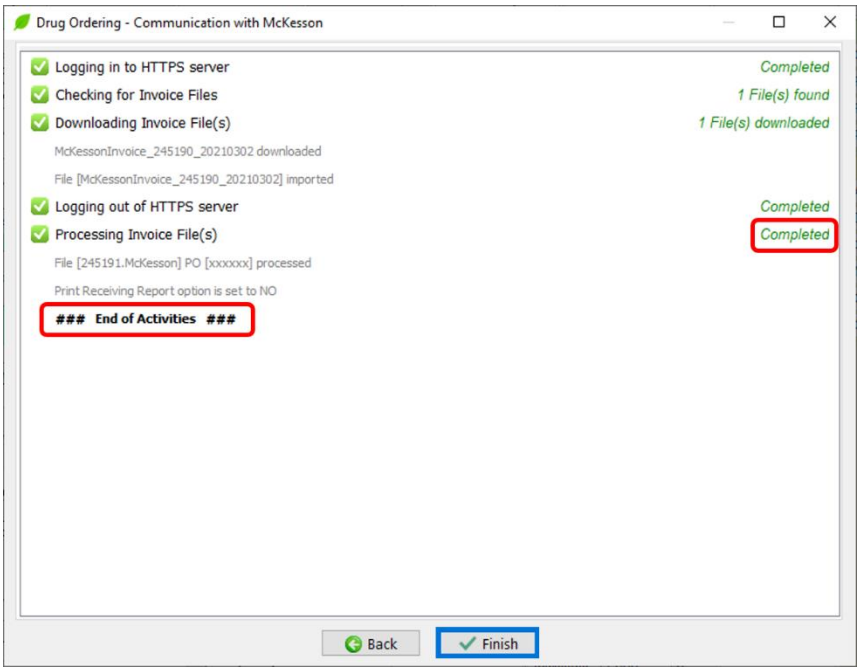

Note: To set a default action for this option, go to
Utilities > Drug Ordering > Edit Vendor List > McKesson > Receiving Tab.
and select the appropriate option from the “Default Action when PO not found” dropdown menu.



Select the invoice that needs to be received and click **Continue** to process the downloaded invoice files.

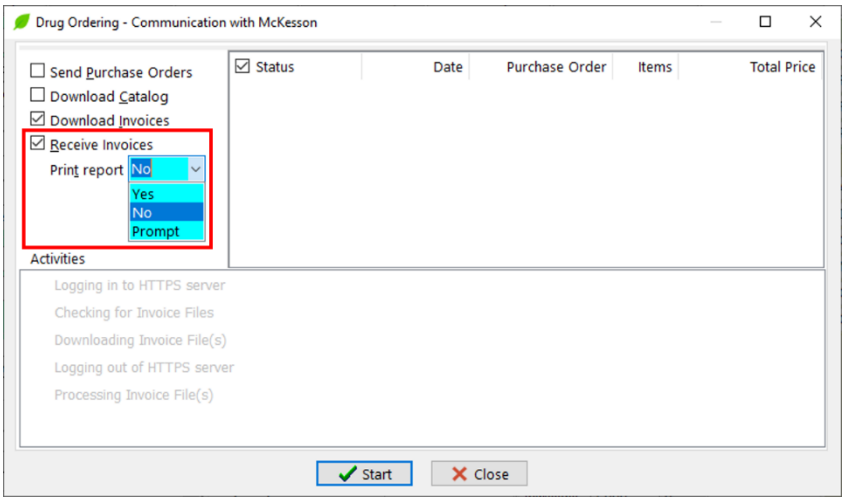



Click **Finish** or press **Enter** on the keyboard to close the communication screen. Click **Back** to start another communication with McKesson.

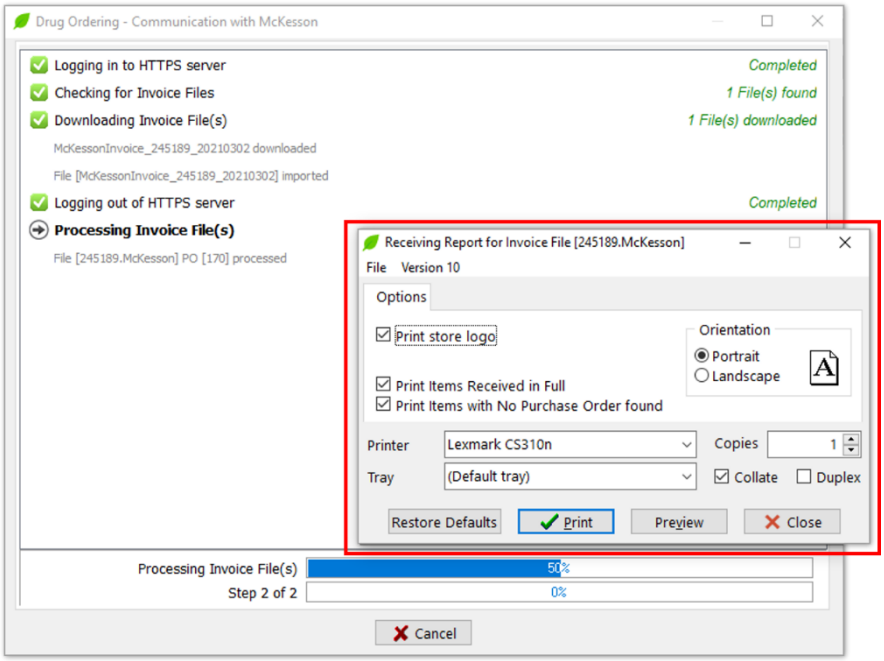


# Receiving Order Report

The Receiving Order Report is generated after the processing invoice file(s) task is complete. The report shows how many items were ordered and received, as well as the dollar amount invoiced. There are three options for printing the report:



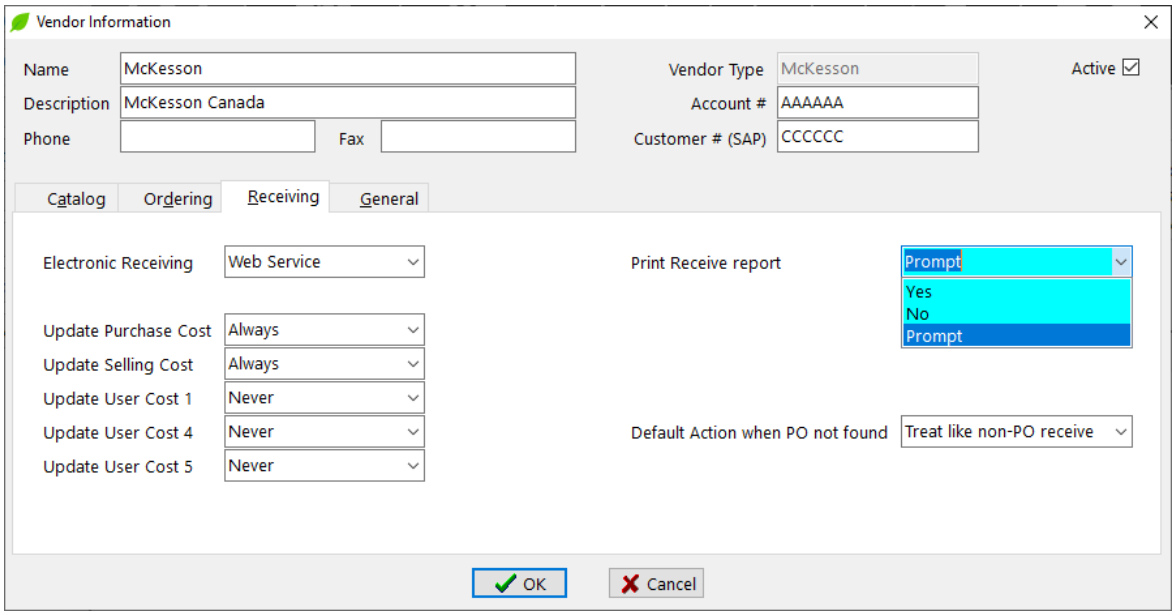

- No: The report will **not** be printed after the processing invoice file(s) task is complete.
- Yes: The report will be sent directly to the printer once the processing invoice file(s) task is complete.
- Prompt: The Receiving Order Report options screen will appear once the processing invoice file(s) task is complete. This screen allows you to configure report options before printing, previewing, or exiting the report.



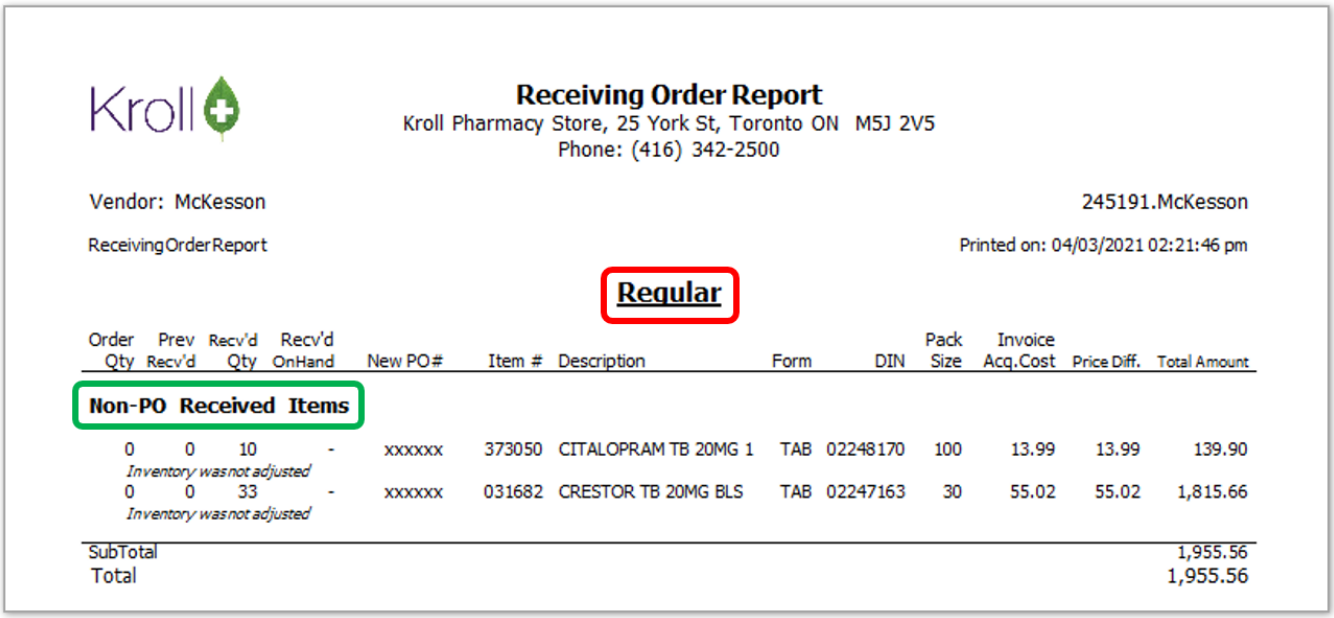
To set a default action for this option, go to

Utilities > Drug Ordering > Edit Vendor List > McKesson > Receiving

and select the appropriate option from the “Print Receive report” dropdown menu.




Depending on the content of the invoice, the Receiving Order Report can have one section (Regular or Narcotic) as illustrated below:



**Receiving Order Report**
Kroll Pharmacy Store, 25 York St, Toronto ON M5J 2V5
Phone: (416) 342-2500

Vendor: McKesson — 245191.McKesson

ReceivingOrderReport — Printed on: 04/03/2021 02:21:46 pm

**Regular**

**Non-PO Received Items**

| Order Qty | Prev Recv'd | Recv'd Qty | Recv'd OnHand | New PO# | Item # | Description | Form | DIN | Pack Size | Invoice Acq.Cost | Price Diff. | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0 | 0 | 10 | - | xxxxxx | 373050 | CITALOPRAM TB 20MG 1 | TAB | 02248170 | 100 | 13.99 | 13.99 | 139.90 |
| *Inventory was not adjusted* | | | | | | | | | | | | |
| 0 | 0 | 33 | - | xxxxxx | 031682 | CRESTOR TB 20MG BLS | TAB | 02247163 | 30 | 55.02 | 55.02 | 1,815.66 |
| *Inventory was not adjusted* | | | | | | | | | | | | |

SubTotal 1,955.56
Total 1,955.56

Or, the report may contain two sections (Regular and Narcotic), as illustrated below:

**Receiving Order Report**
Kroll Pharmacy Store, 25 York St, Toronto ON M5J 2V5
Phone: (416) 342-2500

Vendor: McKesson — 245189.McKesson

Receiving Order Report — Printed on: 04/03/2021 09:30:32 am

**Narcotics**

| Order Qty | Prev Recv'd | Recv'd Qty | Recv'd OnHand | New PO# | Item # | Description | Form | DIN | Pack Size | Invoice Acq.Cost | Price Diff. | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Items Received In Full** | | | | | | | | | | | | |
| 10 | 0 | 10 | 1000 | 170 | 785907 | BROMAZEPAM TB 6MG 10 | TAB | 02177188 | 100 | 14.88 | 13.75 | 148.80 |
| SubTotal | | | | | | | | | | | | 148.80 |
| Total | | | | | | | | | | | | 148.80 |

**Regular**

| Order Qty | Prev Recv'd | Recv'd Qty | Recv'd OnHand | New PO# | Item # | Description | Form | DIN | Pack Size | Invoice Acq.Cost | Price Diff. | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Items Received In Full** | | | | | | | | | | | | |
| 10 | 0 | 10 | 1000 | 170 | 114587 | GLYBURIDE TB 2.5MG 1 | TAB | 01913670 | 100 | 4.13 | 3.81 | 41.30 |
| SubTotal | | | | | | | | | | | | 41.30 |
| **Items Not Received** | | | | | | | | | | | | |
| 10 | 0 | 0 | - | 170 | 312256 | EPIVAL TB 125MG 100 | TAB | 00596418 | 100 | 34.07 | 34.07 | 0.00 |
| *Qty Shipped=0, Inventory was not adjusted, Catalog was not updated, Vendor Msg: Item Discontinued by Manufacturer* | | | | | | | | | | | | |
| SubTotal | | | | | | | | | | | | 0.00 |
| Total | | | | | | | | | | | | 41.30 |
| **Grand Total** | | | | | | | | | | | | **190.10** |

The subsections highlighted in green in the above image categorize the items in the report as follows:

- Items Received in Full: Order Qty = Previously Received + Received Quantity.
- Items Partially Received: Order Qty > Previously Received + Received Quantity.
- Over Received Items: Order Qty < Previously Received + Received Quantity.
- Items Not Received: Received Qty = 0.
- Non-PO Received Items: Items ordered outside of the Kroll system.
- No Stock Received Items: Items that are marked as received, but on-hand quantities were not updated in the Drug cards.
- Discontinued Items: Discontinued by the vendor.
- Items Canceled by Customer: Items that were ordered, but later canceled by the customer.
- Substitution: Items substituted by Vendor

# Important Notes:

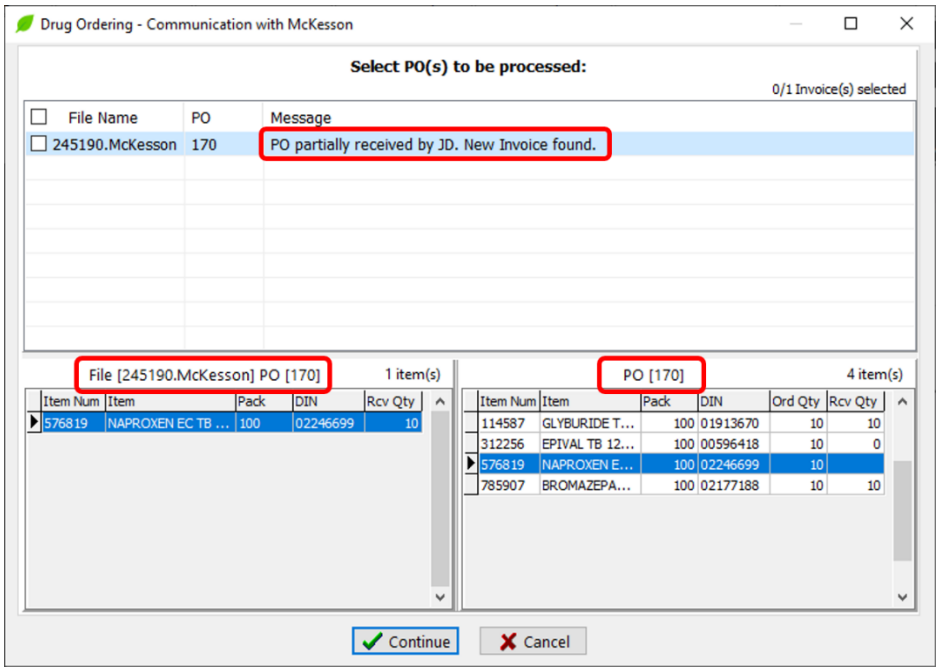
- Use always “Purchase Order” screen to track your orders

  Utilities > Drug Ordering > Purchase Order Receiving.

- Orders with status equal “Partially Received.”

  The order was placed in Kroll. The user did **NOT modify it** on Pharmaclik, like excluding an item or changing the order quantity to zero, causing a discrepancy between the two systems. In this case, Kroll system is waiting to receive more invoices related to that purchase order. Sometimes, McKesson takes 1 or 2 days to send electronic invoices for missing items on previous invoices.

  Here an example where the second invoice will close the purchase order in Kroll and change its status to “Received.”

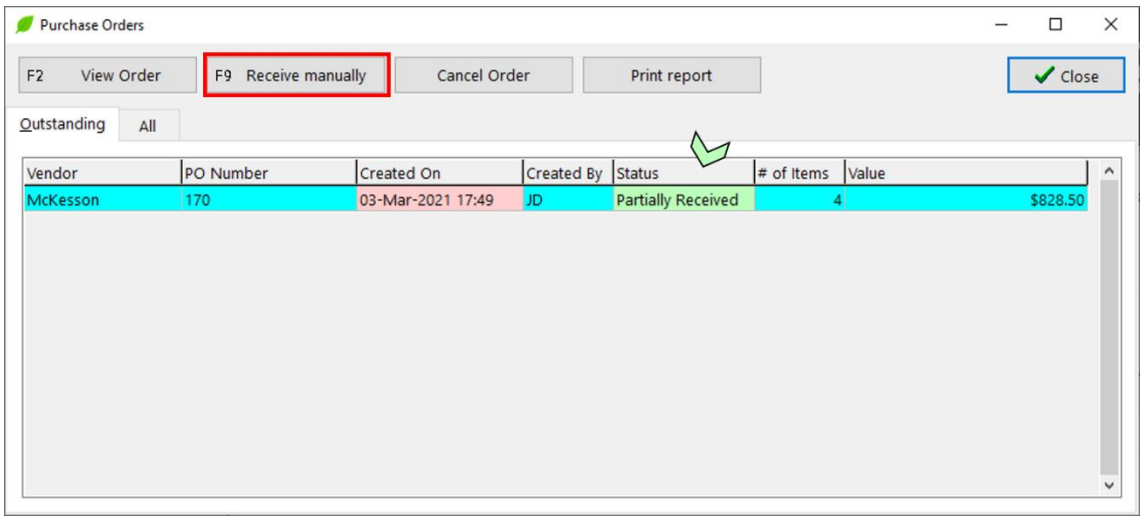



Note on the screen below that invoice 245190 contains the missing item 576819 (NAPROXEN). It is the only item received quantity (Rcv Qty column) equal blank on PO in Kroll (right grid).

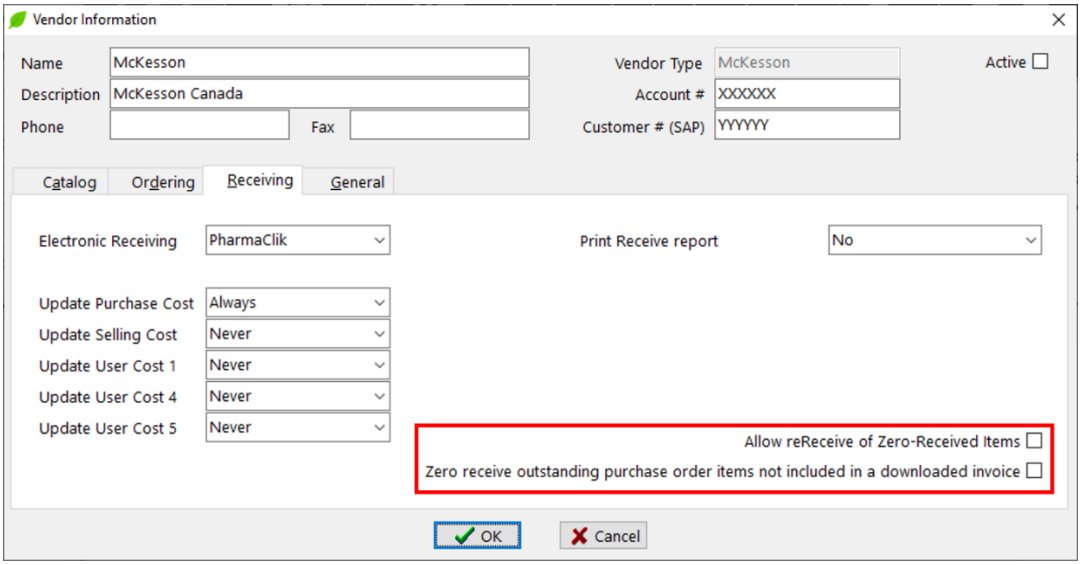
Also, note the message “*... PO partially received… New invoice found.”* indicating that the invoice is NOT the first invoice received related to PO 170.

- Orders with status equal “Partially Received.”

  The order was placed in Kroll., The user **DID modify it** on Pharmaclik, like excluding an item or changing the order quantity to zero. In this case, the user has to **manually receive** the PO by changing the shipped quantity to **0** on the modified items on Pharmaclik. McKesson does not include or generate invoices for items in Kroll order excluded on Pharmaclik.



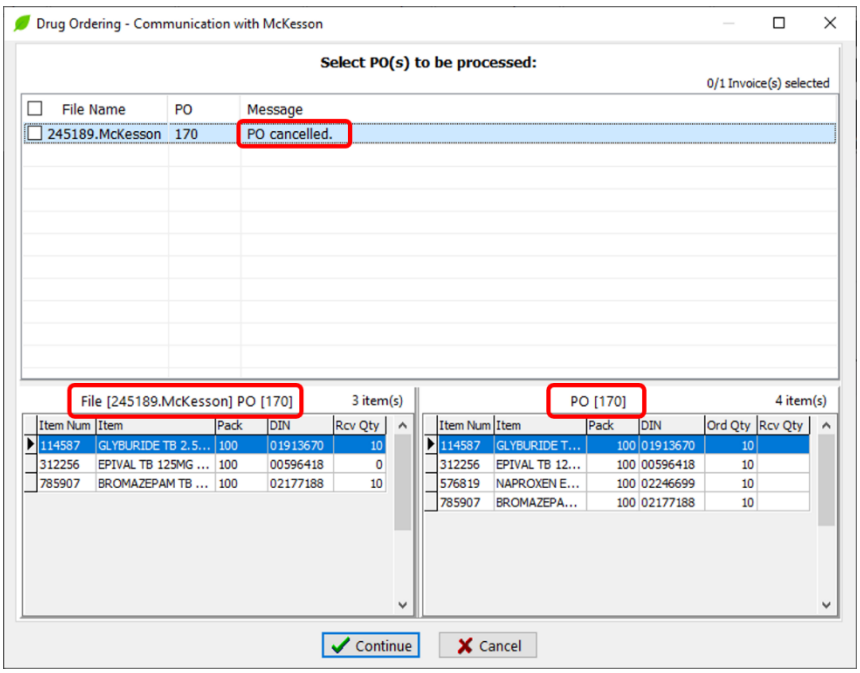

Note that McKesson Web Services functionality no longer has the below options.




- Allow reReceive of Zero-Received Items
- Zero receive outstanding purchase order items not included in a downloaded invoice

- Orders canceled locally only.

  User **DID NOT** delete the order in Pharmaclik, and the order was processed by McKesson. When an electronic invoice related to the canceled order is downloaded, the receiving process will allow you to decide if you want to receive it or not.

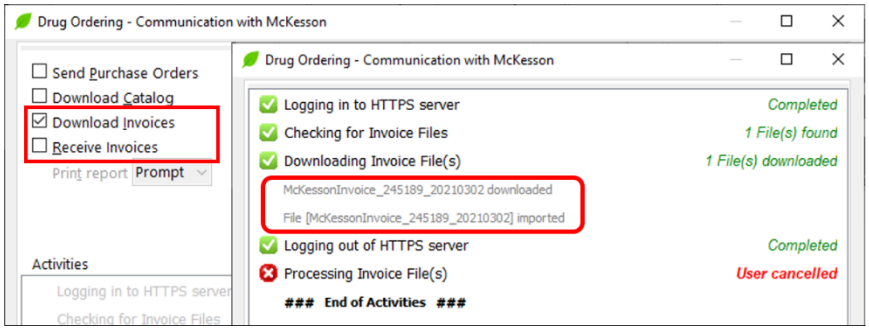



In the scenario above, even PO is canceled in Kroll, you should receive the invoice to allow the inventory to be adjusted.

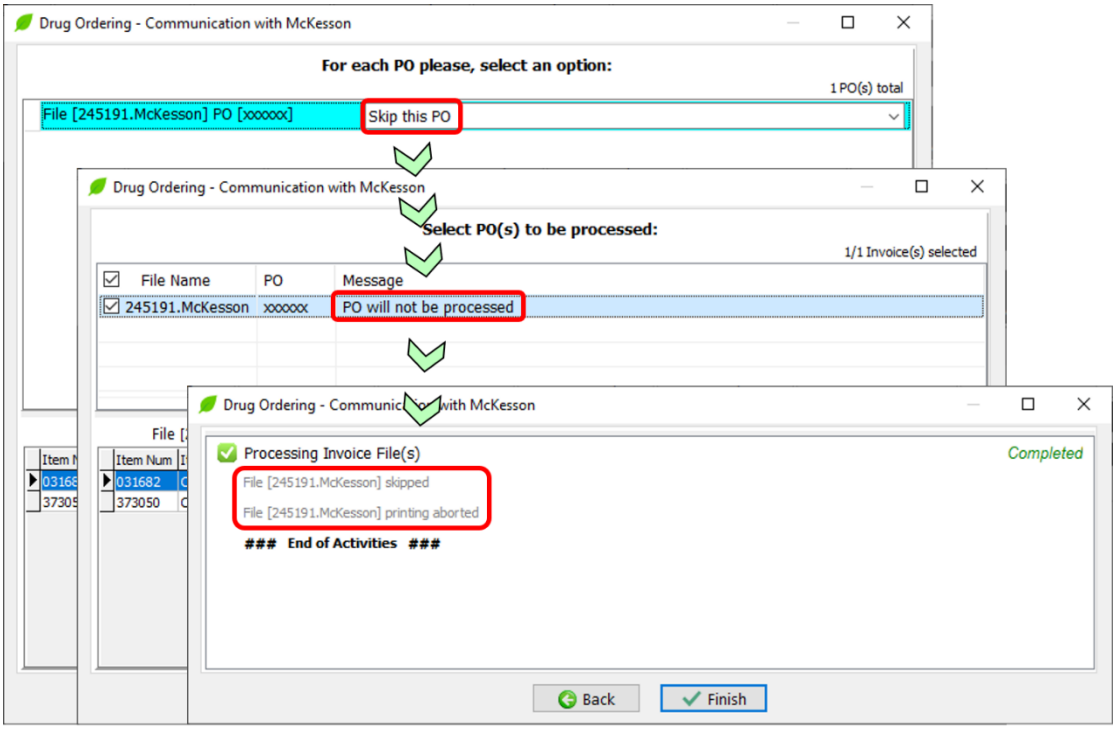
- Invoices NOT selected to be processed and invoices skipped.

  Downloaded invoices will always be imported into the database even when one of the scenarios below happens:

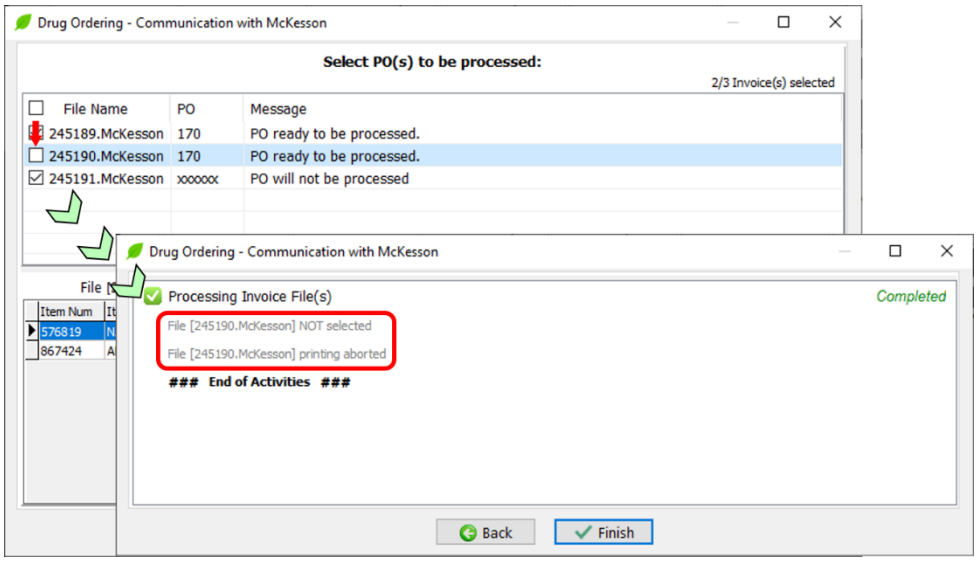
  1. "Receive invoices" option on the communication screen is not checked.
  2. The user cancelled the processing.



3. Invoices related to orders placed directly in Pharmaclik, the user chooses the option “Skip this PO”.



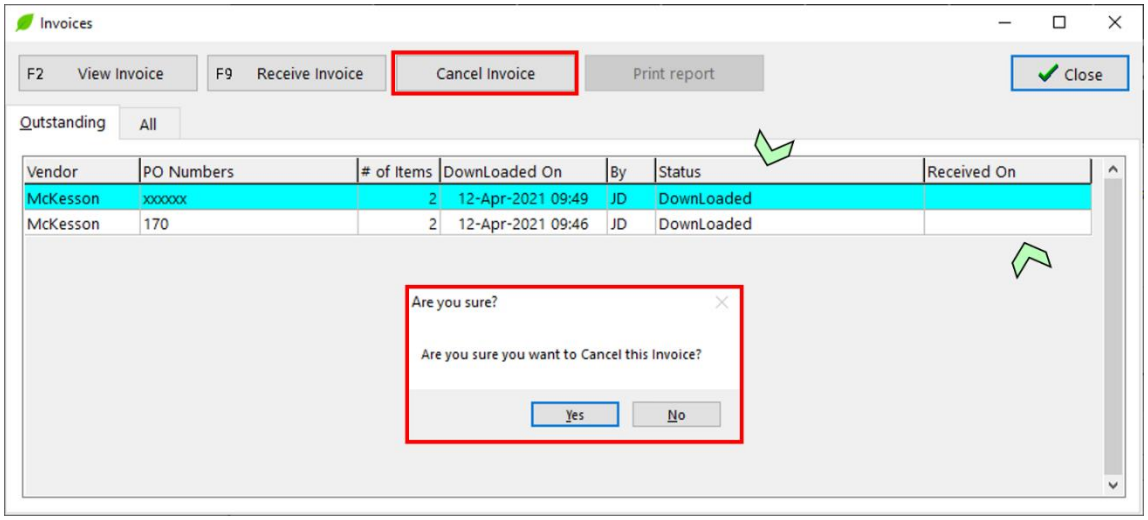

4. Invoices not selected to be processed by the user.




These invoices will appear again on McKesson's following communication until the user decides to process or cancel them.

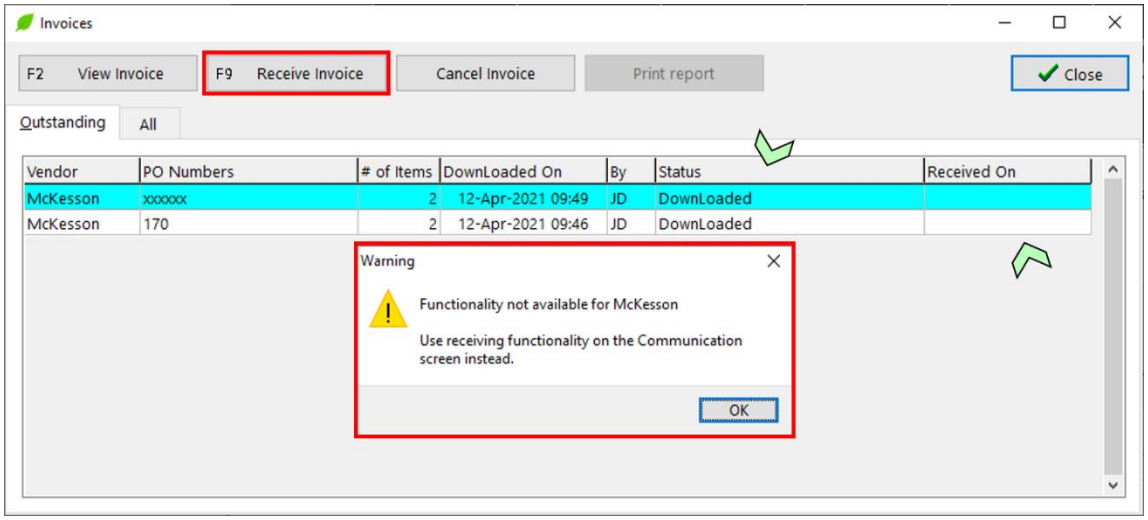
- Canceling invoices that should **NOT** be processed.

  Invoices downloaded but not received and for any reason should **not** be processed then must cancel them on the Invoices screen. Utilities > Drug Ordering > Electronic Invoice Receiving.
  Canceled invoices will NOT show up on McKesson's following communication.



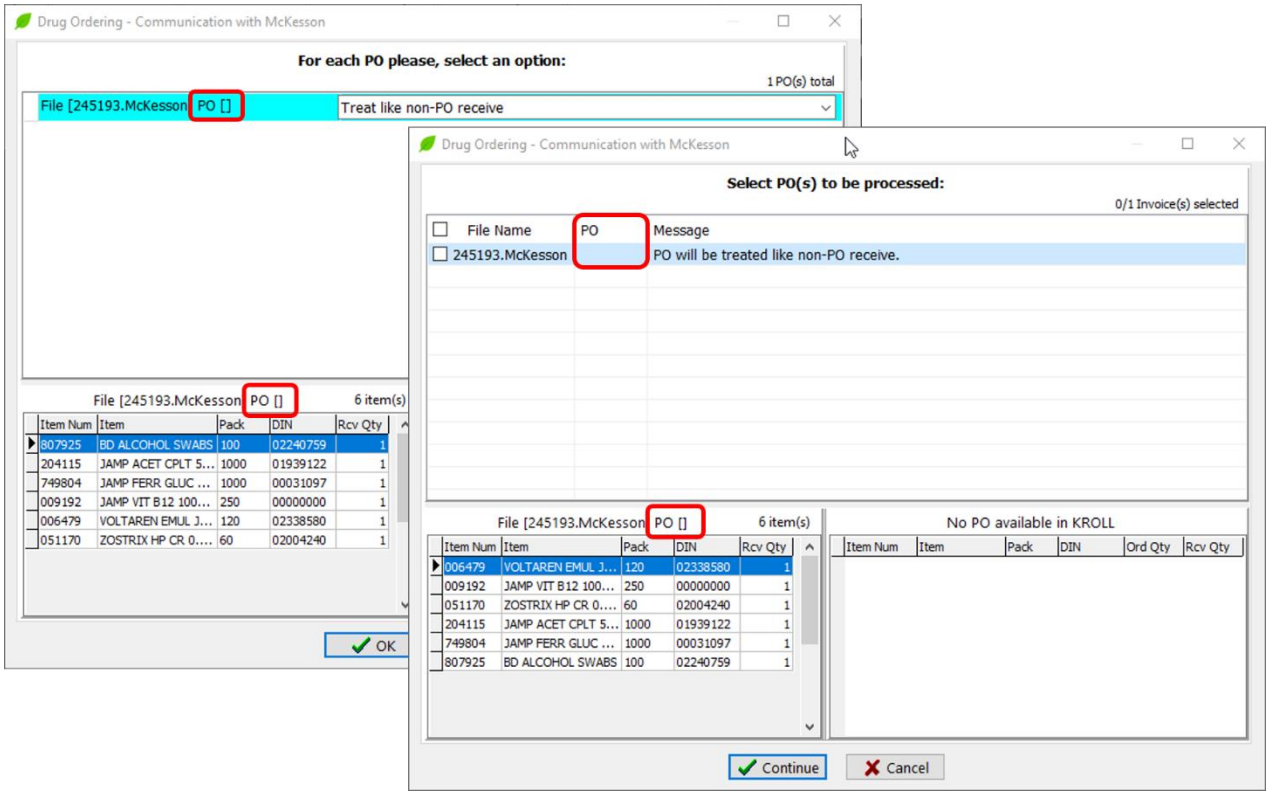

- Receiving is **NOT** allowed on the Invoices screen.

  You **must always** receive invoices using the communication screen instead.
  Invoices downloaded but not received will appear again on McKesson's following communication.



- Orders placed in Pharmaclik where user left the PO number (Purchase Order number) blank.

  Invoices related to that order will NOT show PO number on the communication screen. Kroll system will try everything that is possible to process these invoices when the user chooses to treat them as no stock received or a non-PO receive.




You should **NEVER** enter a blank PO number in Pharmaclik. Please, read “Placing an Order in Pharmaclik section”.