Z Office Quick Guide

Nelp.zsoftware.com.au/hc/en-us/articles/360026989491-Z-Office-Quick-Guide

Z Office is used to manage stock, customer accounts and run reports. This guide aims to cover the basic functions of the Z Office program. Please note, certain parts of the program may be different depending on your staff permissions.

To open Z Office

- 1. Double-click the Z Office icon

on the desktop

- 2. Click your name in the Login screen
- 3. Enter your PIN and press Enter

Managing stock

To search for and edit stock

- 1. Go to Z Office > Stock > Manage Stock
- 2. Enter the product name, PDE or barcode into the search bar and press Search
- 3. Double-click the stock you wish to edit to open up the stock card
- 4. Make any necessary changes
- 5. Press Save

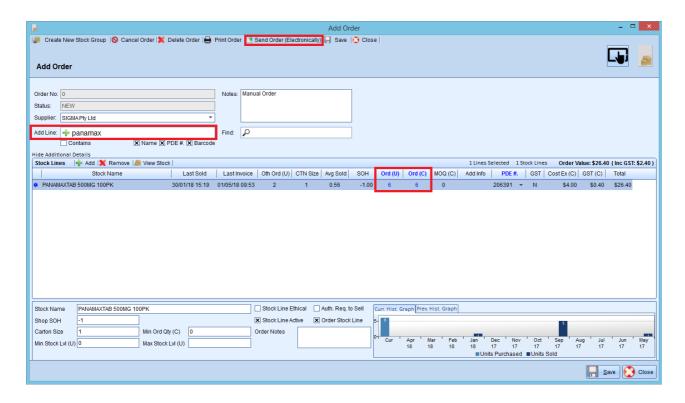
To create new stock

- 1. Go to Z Office > Stock > Add New Stock Line
- 2. Enter in all the necessary stock information
- 3. Press Save

Creating Orders

To create an order manually

- 1. Go to Z Office > Orders > Add New Order > Create Manually
- 2. Select the Supplier
- 3. Scan or search for the product you wish to order in the Add Line field
- 4. Adjust the order quantity under Ord (U) or Ord (C). Ord (U) is the quantity in units and Ord (C) is the quantity in cartons
- 5. Press Save to save the order if you wish to come back to it later
- 6. Press Send Order (Electronically) if you have PharmX set up for that supplier
- 7. Press Print Order Sheet / Mark as Sent to print an order sheet to send to the supplier



To create an order from a template

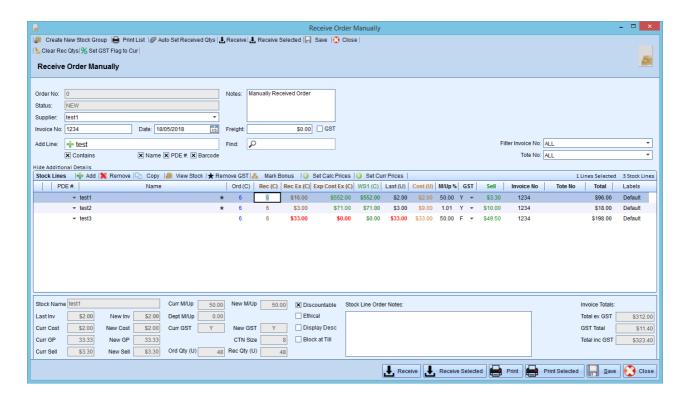
- 1. Go to Z Office > Orders > Add New Order > Create From Order Template
- 2. Select from an existing template or Use Blank Template
- 3. Edit the order details, order type, order options and stock filters
- 4. Press Generate Order
- 5. Press Save to save the order if you wish to come back to it later
- 6. Press Send Order (Electronically) if you have PharmX set up for that supplier
- 7. Press Print Order Sheet / Mark as Sent to print an order sheet to send to the supplier

See Manage Order Templates for more information.

Receiving orders

To receive an order manually

- 1. Go to Z Office > Orders > Receive Order Manually
- 2. Select the supplier, enter the invoice number, date and any notes if necessary
- 3. You can enter the freight charge if applicable and tick the GST field if GST is included
- 4. Scan or search for the product you wish to receive in the order in the Add Line field
- 5. Enter the quantity received in cartons in the Rec (C) column
- 6. Enter the cost per carton in the Rec Ex (C) column
- 7. Repeat steps 4-6 until you have added everything from the invoice
- 8. Press Save to save the invoice if you wish to come back to it later
- 9. Press Receive to enter the invoice into the system and adjust the stock



To receive an order through PharmX

- 1. Go to Z Office > Orders > Manage Orders
- 2. Press Search to bring up all orders and invoices that have yet to be received (you can change the filter for order status and date range)
- 3. Double click the order you wish to receive (Invoices that come through PharmX will normally have status Invoice Attached)
- 4. Check through the invoice to make sure the Rec (C) and Rec Ex (C) are correct
- 5. Press Save to save the invoice if you wish to come back to it later
- 6. Press Receive to enter the invoice into the system and adjust the stock

Managing customer profiles

- 1. Go to Z Office > Customers > Manage Customers
- 2. Enter the patient's surname and first name into the search bar and press Search
- 3. Double-click the customer you wish to edit
- 4. Edit any necessary fields
- 5. Press Save

Checking a debtor account balance

- 1. Go to Z Office > Customers > Manage Customers
- 2. Enter the customer's surname and first name into the search bar and press Search
- 3. Double-click the customer the account is linked to
- 4. Go to the Accounts tab
- 5. Double-click the account (you can also press the Print Statement button)

Running a report

- 1. Go to Z Office > Reports > Manage Reports
- 2. Press Search