


Z Office Quick Guide

help.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

Receive Order Manually

Create New Stock Group | Print List | Auto Set Received Qty's | Receive | Receive Selected | Save | Close |
 Clear Rec Qty's | Set GST Flag to Cur |

Receive Order Manually

Order No: 0 Notes: Manually Received Order
 Status: NEW
 Supplier: test1
 Invoice No: 1234 Date: 18/05/2018 Freight: \$0.00 GST
 Add Line: + test Find:
 Contains Name PDE # Barcode

Filter Invoice No: ALL
 Tote No: ALL

Hide Additional Details

Stock Lines	Add	Remove	Copy	View Stock	Remove GST	Mark Bonus	Set Calc Prices	Set Curr Prices	1 Lines Selected 3 Stock Lines						
PDE #	Name	Ord (C)	Rec (C)	Rec Ex (C)	Exp Cost Ex (C)	WS1 (C)	Last (U)	Cost (U)	MUp %	GST	Sell	Invoice No	Tote No	Total	Labels
test1	*	6	6	\$16.00	\$552.00	\$552.00	\$2.00	\$2.00	50.00	Y	\$3.30	1234		\$96.00	Default
test2	*	6	6	\$3.00	\$71.00	\$71.00	\$3.00	\$9.00	1.01	Y	\$10.00	1234		\$18.00	Default
test3		6	6	\$33.00	\$0.00	\$0.00	\$33.00	\$33.00	50.00	F	\$49.50	1234		\$198.00	Default

Stock Name: test1
 Last Inv: \$2.00 New Inv: \$2.00
 Curr Cost: \$2.00 New Cost: \$2.00
 Curr GP: 33.33 New GP: 33.33
 Curr Sell: \$3.30 New Sell: \$3.30
 Curr MUp: 50.00 New MUp: 50.00
 Dept MUp: 0.00
 Curr GST: Y New GST: Y
 CTN Size: 8
 Ord Qty (U): 48 Rec Qty (U): 48
 Discountable
 Ethical
 Display Desc
 Block at Till

Stock Line Order Notes:

Invoice Totals:
 Total ex GST: \$312.00
 GST Total: \$11.40
 Total Inc GST: \$323.40

Receive | Receive Selected | Print | Print Selected | Save | Close

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
3. Double-click one of the reports you wish to run

