

Prescription Pad Design Forms

Overview

Introduction

In this tutorial, you will learn how to enter a standard Prescription Pad design form.

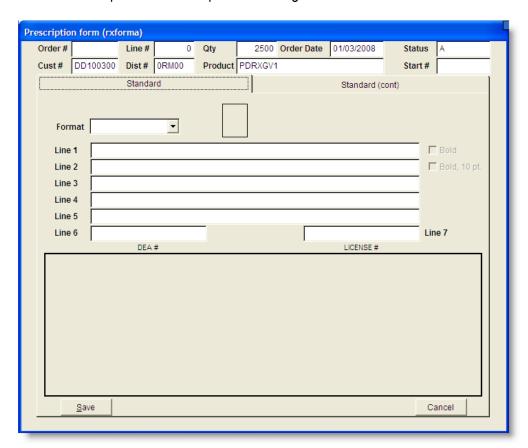
The electronic design form can only be used for the following standard prescription pad product codes:

- → PDRXGV1 Vertical 1-part [pad]
- → BKRXGV2 Vertical 2-part [book]
- → PDRXGH1 Horizontal 1-part [pad]
- → BKRXGH2 Horizontal 2-part [book]

If a custom prescription pad is required, you will need to complete a manual design form.

Prescription Pad Design Form

This is an example of the Prescription Pad design form:





Prescription Pad Design Form, cont.

Prescription Pad Design Form To enter a new Prescription Pad design form, follow the steps below.

Step	Action
1	Navigate to Contacts from the File menu in CMS by clicking on the Submenu title Contacts .
2	Using the mouse, Click on the method by which you will be searching for a contact to place an order.
	NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <u>Long Name</u> , or <u>Customer Number</u> .
3	Type the information you're looking for [Example: Phone number –area code not required]. Press Enter
4	Once the customer is highlighted in the customer list, press Enter .
5	 Enter the product number in the first field of the first line. Note: If you do not know the product number, enter the first few letters of the product code and press Enter to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press Enter. NOTE: If this is a repeat order, press F3 to select from the Detailed Order
	History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press Enter .
6	In the next field enter an N for new [only available on the customer's first order], R for repeat, or an A for an add-on sale.
7	In the Quantity field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

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Prescription Pad Design Form, cont.

Step	Action
8	TAB past the STK/Start # [these fields are not required on these orders].
9	OVR, use this field to over ride the set price or to use special or value pricing. OVR Codes M - Sell Price Override L - Laser Variable Pricing C - Price Override U - Universal X - 28% Off Next Imprint Order 8 - 588 Free Computer Checks
	Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting a value price option, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]
10	The % <percentage> field is used to give an additional discount for the item. NOTE: If using this field for additional discounting, it will reflect a full</percentage>
	discount in your commissions as well.
11	The Price field will fill automatically (unless M is in the OVR field in that case the price must be manually entered).
12	Add a recall date, CSR code, and any comments in the last three fields. NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.
13	For orders that require a design form the D at the end of the product line field will change to a T when the design form is created.
14	Press F9 to access the Design Form screens.
15	 Standard Screen: ➤ Format – Select from one of nine standard format options. When selecting an option, the imprint format will be displayed.

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Prescription Pad Design Form, cont.

Step	Action
16	Standard (cont.) Screen:
	 PDF Proof Required – If an electronic proof is requested, use the mouse to put a check mark in the box. Then click the appropriate button next to the option of who should receive the proof and enter the email address. Fax Proof Required - If a fax proof is requested, use the mouse to put a check mark in the box. Then click the appropriate button next to the option of who should receive the proof and enter the fax number.
	NOTE: When selecting the Dist email option, the address pre-populates with the email address on record for the distributor associated with this customer.
17	Press F10 to save the design form.
18	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
19	Press F10 to save the order and transmit.