

## TO BUY STOCK

Click on blue 'Buy Stock' tab.

**To search for an item:** type in first few letters of 'Product name' box and click 'Find'.

**To shortlist:** look through search results. Click 'TAG' button alongside any items of interest then click 'Add to shortlist' button, at the bottom of the search results.

**To identify stock location and contact:** click on 'PRODUCT NAME' in the search results or click on 'CONTACT' in 'Shortlisted Items'.

**To change quantity required** (from the amount offered for sale): click on 'Shortlisted Items', click on the 'QTY' box next to the 'PRICE' column and amend the quantity to the number required then click on 'Update Shortlist' button.

**To change the offer price:** click on 'Shortlisted Items', click on 'PRICE' box of item to make an offer on. Type in your offer price per pack or unit and click 'Update Shortlist' button. If the price is not in a box it is 'fixed' and cannot be changed by the buyer.

**To make an offer:** having amended price or quantities, if desired, click on the 'OFFER' tickbox alongside any items in your shortlist that you want to offer on and click 'Update Shortlist'.

**To remove an item from your shortlist:** click on the 'BIN' tickbox alongside any item you want to remove then click on 'Update Shortlist'.

**To withdraw an offer:** from the 'BUY STOCK' menu click on 'Buying Transactions in Progress'. Click on 'View & Change Order' for the appropriate order and click on 'WITHDRAW OFFER' button alongside items to be withdrawn then on 'Update'. This can only be done before the seller approves the offer. If the offer has been approved contact the seller directly using 'Contact Details'.

**To acknowledge receipt of goods:** from the 'BUY STOCK' menu click on 'Buying Transactions in Progress', any orders sent to you will be listed with a red action button saying 'Goods Arrived?' alongside. Click on this button then on 'RECEIVED' button alongside each item that has been received and also 'Post and Packing'. Click 'Update'.

**To contact the seller:** you can email, phone or write. Contact details can be found on all order detail screens, by clicking on a selected product name or clicking on 'email owner' button on various screens. (Contact details are only shown to other registered Rxchange users).

**To view invoice:** you can view an invoice after the seller has triggered an invoice. Click the 'Buying Transactions in Progress' screen, click the 'Pay order?' button. This

will detail the order including products and post and packing. Click on green 'View invoice to be paid' bullet. The full invoice is detailed including payments already received.

**To pay:** agree payment method with the seller. It is possible to run an account on the Rxchange system between two parties to be settled at a later date. To use Pay Pal you will need to set up an account with them directly.

## **TO ADD STOCK TO YOUR LIST TO SELL**

Click on 'SELL STOCK'.

**To add stock:** click on 'Add New Stock' then on 'Product name'. Type in the name then click through the fields to enter more details and click the 'Add Stock' button when the information is complete. Information requested in bold type must be filled in, other details are not mandatory but helps to avoid queries.

**To add products not in the database:** enter all the product details in the relevant fields and click 'Add Stock'. A message will appear below the 'Product name' asking you to clarify the product is correct. Ensure the product is spelt correctly then click on 'Add to list' and 'Add Stock'.

**To set a fixed price:** enter all the product details including 'Price per pack (Nett)' and click on 'Fixed price'. When all details have been entered click 'Add Stock'. The price can be fixed at zero (0.00) if you wish to give the stock at no charge.

**To set a markup:** enter all the product details including 'Price per pack (Nett)'. At the 'Publishing restrictions' options click in the 'Markup price' box to select when the markup should be applied. Tab to type in 'Markup by' percentage then click 'Add Stock'. Markup is by percentage of the 'Price per pack (Nett)'.

**To set a discount:** enter all the product details including 'Price per pack (Nett)'. At the 'Publishing restrictions' options click in the 'Discount price' box to select when the discount should be applied. Tab to type in 'Discount by' percentage then click 'Add Stock'. Discount is by percentage of the 'Price per pack (Nett)'.

**To restrict who I sell to:** enter all the product details, at 'Publishing restrictions' options click in 'Publish to all Rxchange users' box. Select when the stock should be published to – this can be never – and then click 'Add Stock'.

**To remove trading restrictions:** enter all the product details, at 'Publishing restrictions' options click in 'Publish to all Rxchange users' box. Select 'Publish now' and click 'Add Stock'.

**To set up a trading partner list:** click on red 'YOUR ACCOUNT' tab. Under 'Trading Partners' heading click on 'Contact us to update your Trading partner list'. This will take you to an email link to send your partner information to be activated. This information cannot be edited online.

**To view stock you have listed for sale:** click on yellow 'SELL STOCK' tab, from the menu click on 'Items You Have Listed For Sale'.

**To edit stock you have listed for sale:** click on 'Items You Have Listed For Sale' from the 'SELL STOCK' menu, select the item from the list and click on its 'PRODUCT NAME'. This will take you into the screen to edit any details. When you have finished click on 'Update stock' button.

**To delete stock you have listed for sale:** click on 'Items You Have Listed For Sale' from the 'SELL STOCK' menu, select the item from the list and click in the 'BIN' tickbox alongside the item. Click on 'Delete selected'.

**To view product lines expiring in a set time:** click on 'Items You Have Listed For Sale' from the 'SELL STOCK' menu. Look down the page to find 'Items expiring shortly', click in 'Expiring within ...' box to select the timeframe then click 'Go'. If no report is produced then there are no entries for that timeframe.

**To view expired product lines report:** click on 'Items You Have Listed For Sale' from the 'SELL STOCK' menu. Look down the page to find 'Items that expired', click in 'Expired within last ...' box to select timeframe then click 'Go'. If no report is produced then there are no entries for that timeframe.

**To view previously completed or withdrawn orders:** click on yellow 'SELL STOCK' tab, then from the menu click on 'Sales History'. 'Completed orders' summaries will be listed. Click on 'VIEW DETAILS' alongside an order summary to view the details of that transaction.

## TO SELL STOCK

**To accept or reject an offer:** when an offer has been made to you a red bar will show 'To Do' on the homepage. Click on 'To Do' to go straight through to 'Sales Transactions In Progress' and click on the red 'Approve or Reject' button. Click on either 'Accept' or 'Reject' button against the product offer then click 'Update' button. You can also access 'Sales Transactions In Progress' by clicking the yellow 'SELL STOCK' tab.

**To change the quantity to be sent, before dispatch:** click on the red 'To Do: ? order You must send' bar on the Home page. Click on the red 'Send goods' button for the relevant order, click in the 'QTY' box alongside the item and amend as required. When complete click 'SENT' and 'Update'.

**To add Postage and Packing:** click on 'Sales Transactions In Progress' then click on the red 'Send goods' button for the relevant order and scroll down to click in and amend 'Postage & Packing costs'. Ensure that the number of units in 'QTY' for 'Post And Packing' is correct and press return.

**To ship goods:** physical dispatch of goods is the responsibility of the seller. To notify the buyer that goods are in transit and enable invoicing click on the red 'To Do: n order You must send' bar on the Home page. Click on the red 'Send goods' button next to the order in the 'Sales Transactions In Progress' screen. Add any agreed 'Postage and Packing costs' and any shipping notes or references. Click 'SENT' tickbox alongside all relevant items to be sent and 'Post and Packing' then click 'Update'. To enclose a delivery note with the goods click on the bullet 'View 'open' delivery note then 'Print' at the top right of the page.

**To view the value of a sent order:** click on the 'SELL STOCK' tab. Click on 'Sales Transactions In Progress' and the system will list summaries of orders sent where payment has not been confirmed as completed. To view the detail of any order click on 'View Order'. 'Sales History' will list orders where payment has been confirmed as made.

**To invoice on Rxchange:** invoicing will default to 'Invoice when the goods are received' in the screen for 'Items that you must send'.

**To invoice at the time the goods are sent:** click on the 'Invoice now' button, below 'Postage and Packing' and click on the 'SENT' tickbox alongside all items that are being sent, including the 'Post and Packing' tickbox and then click 'Update'.

**To invoice after the goods have been received:** the system will default to this setting. When the buyer has confirmed arrival of the goods, click the red 'To Do: 1 order You may invoice' bar on the Home page. Click the red 'Create invoice' button alongside the order, click on the 'INVOICE' tickbox alongside all items to be invoiced then click 'Update'. To review the invoice click on the bullet 'View invoice to be paid'. The invoice can be printed off to file or forward by clicking 'Print' in the top right of the page.

**To contact the buyer:** the buyer can be contacted by email, phone or letter according to the details supplied via the Rxchange interface. Contact details can be found on order and invoice screens.

**To run an account between two parties:** items must be confirmed as sent by the seller and received by the buyer via the Rxchange interface. The buyer does not complete payment to the seller straight away and leaves the payment as due until a later date. Under 'Sales Transactions In Progress' the seller's screen will show 'Orders you can invoice' and a transaction summary with a red 'Create invoice' button. As long as no action is taken the account will continue running and auto balance according to each transaction between the parties until such time an invoice is sent by whichever party is in credit and the account paid by that in debit. The account will revert to zero as long as all payments are confirmed as made.

**To run an account between more than two parties:** email Rxchange support with the details of the parties to be traded between and a 'Partner Trading' facility can be set up.