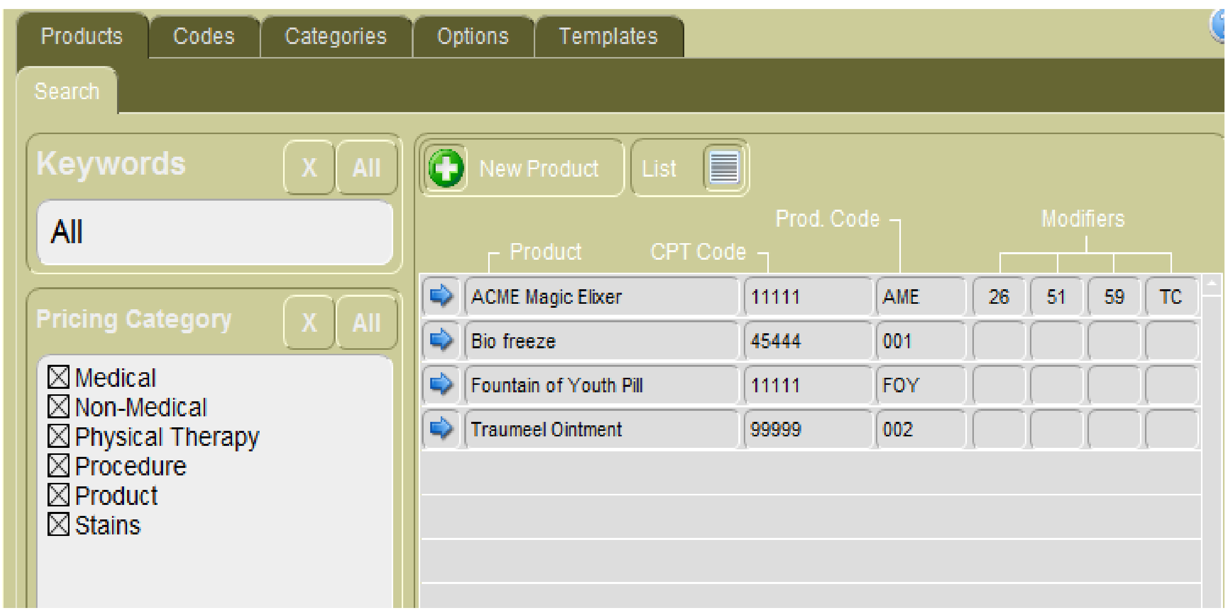
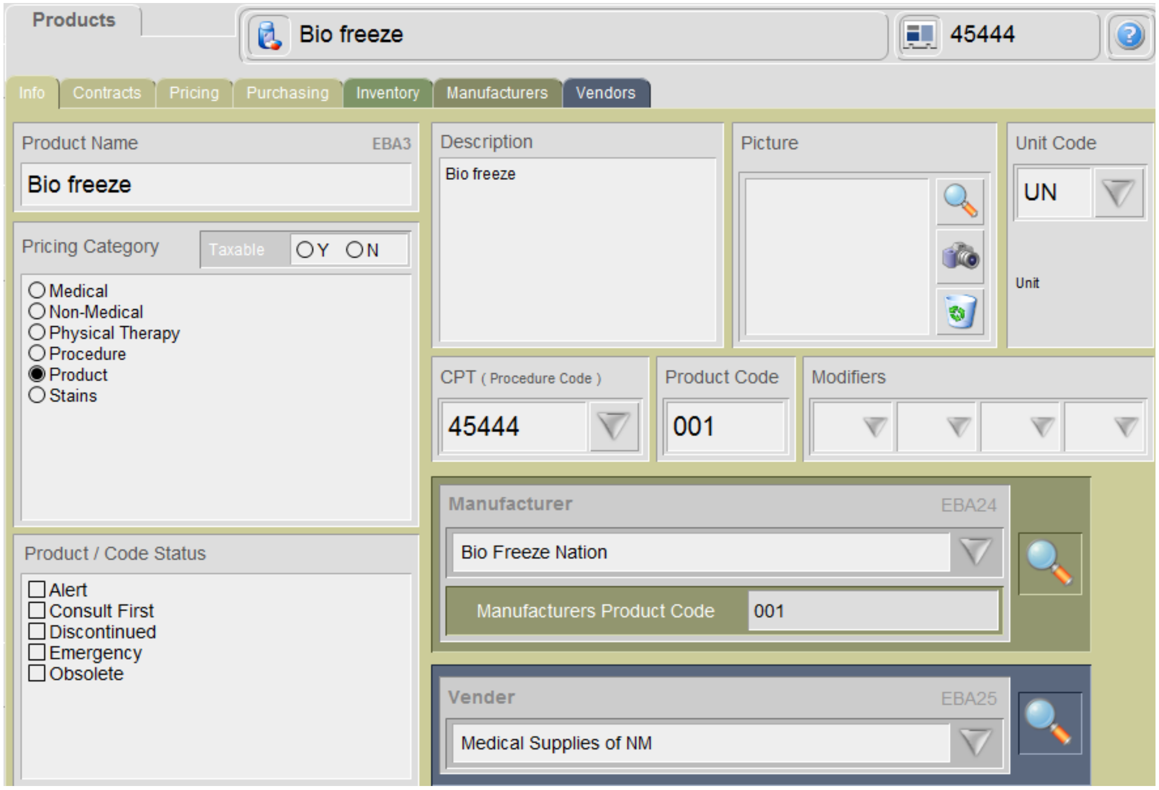
Products Entry Instructions

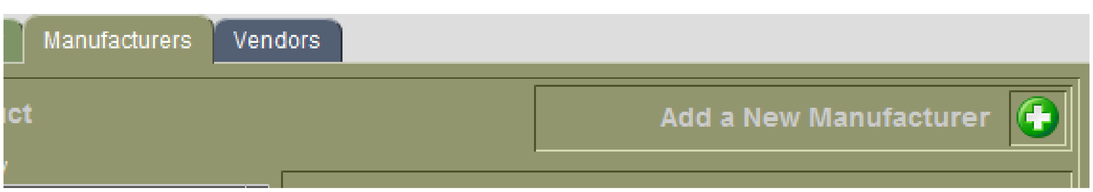
- Go to the **Libraries** menu and select the **Products** tab.
- First, do a search to be sure the product you are entering is not already in the library.
    - In the “Keywords” box, click “**All**”.
    - In the “Pricing Category” box click “**All**.”
    - Review the list to the right to see if the product is already entered
      If there are a lot of products, you can then refine your search by typing keywords into the “Keywords” search box.



- Once you are confident that your product is not already in the library, create a new product by clicking on the green plus sign labeled “**New Product**.”
- Enter the “Product Name.”
- Select a product “Pricing Category” (The list can be added to or modified in **Libraries** menu, **Category** tab.)
- Enter the “Product Code” and “Status”.

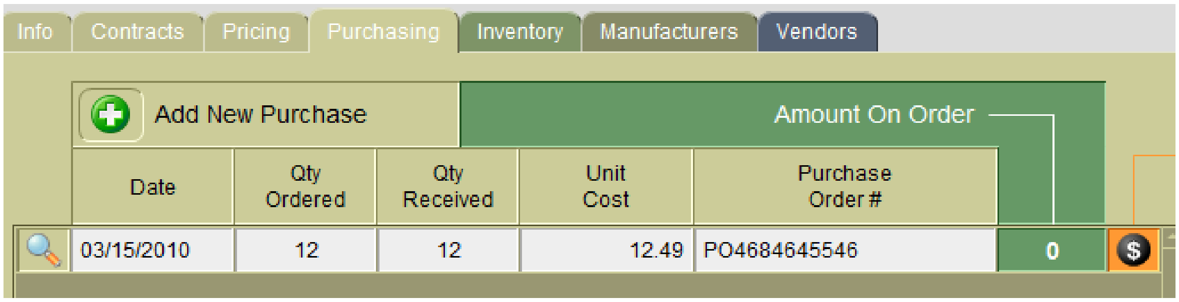


- Enter a “Description”.
- “Picture” is optional.
- Select a “CPT” code that properly and directly identifies the product.
- Enter the “Product Code” if the product has a specific code from the manufacturer to help identify it later for ordering, etc.
- Enter the “Unit Code” (UN Is classic).
- For “Manufacturer”, click on the down arrow and see if the manufacturer is in the list. If it is not in the list, go to the **Manufacturers** tab and click on the green plus sign labeled “**Add a New Manufacturer**”.

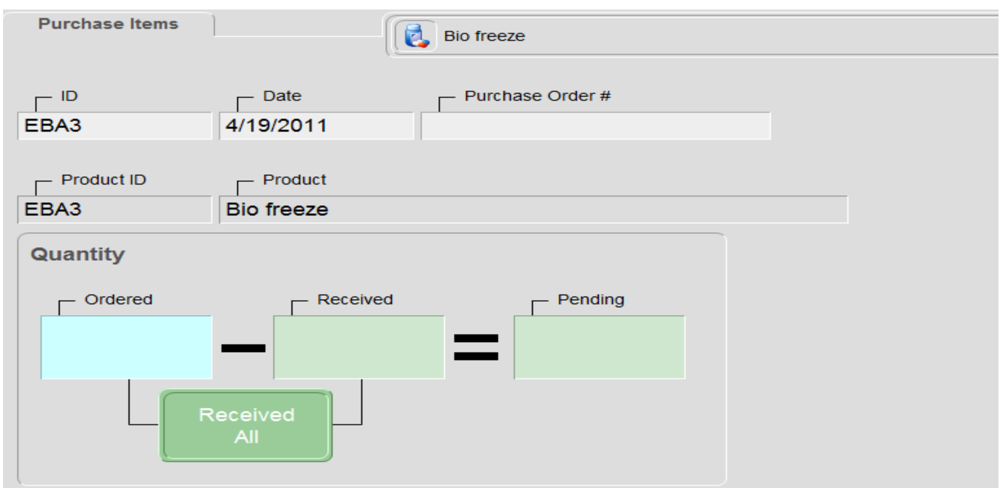


- Enter the manufacturer information. Then, return to the **Info** tab and the “Manufacturer” field will be filled in with the new manufacturer.

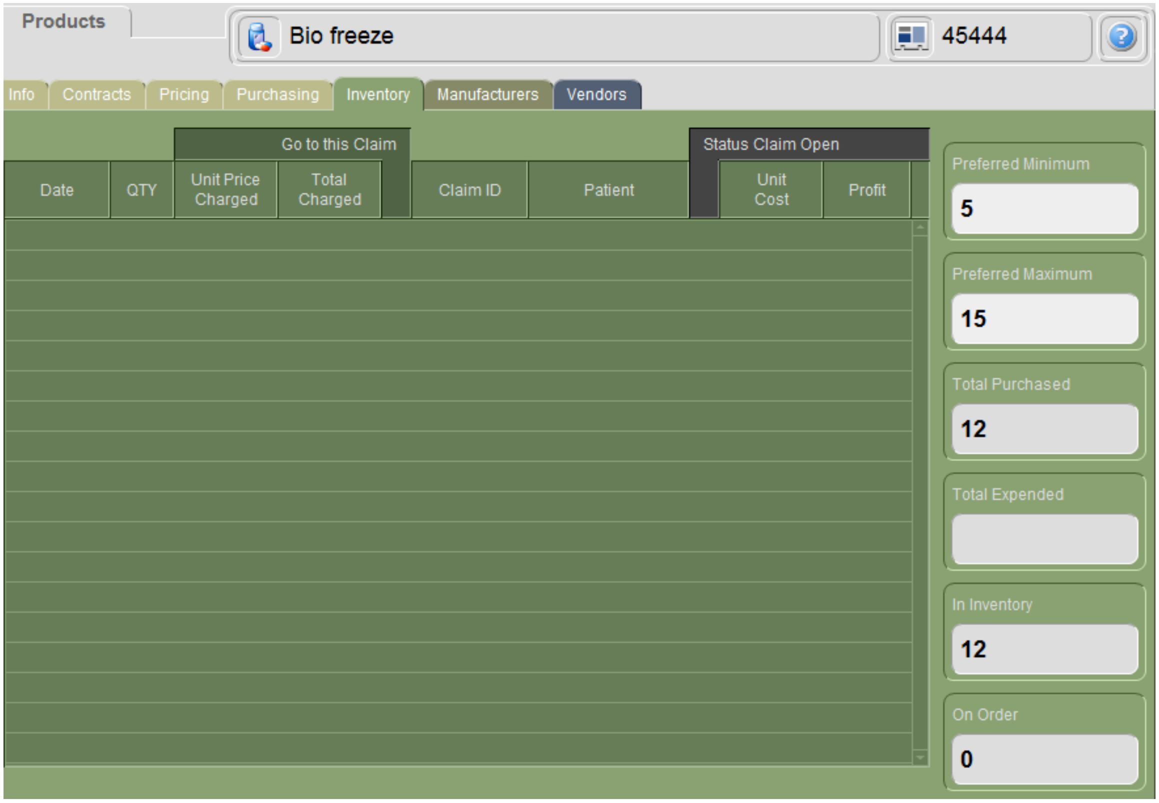
- Fill in the "Vendor" field (only if you have a Vendor to enter), choose the down arrow. If the Vendor you want is not in the list, go up to the **Vendors** tab and click the "**Add a New Vendor**" button. Enter the Vendor information. Then, go back to the **Info** tab. The "Vendor" field will be filled with the newly entered Vendor.
- When you are ready to place an order for the product, go to the **Purchasing** tab. Click the green plus sign labeled "**Add New Purchase**."



- Enter the correct purchase "Date", "Purchase Order #", "Quantity Ordered, "Quantity Received" and/or "Quantity Pending" to track inventory accurately.



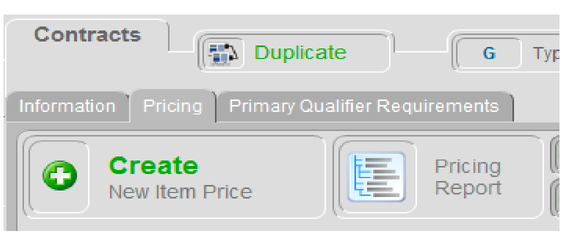
- Next, go to the **Inventory** tab to enter the "Preferred Minimum" and "Preferred Maximum", if applicable. This tab is used to track how much of the product is remaining, has been expended, and/or is on back-order; as well as to see all orders for the Product.



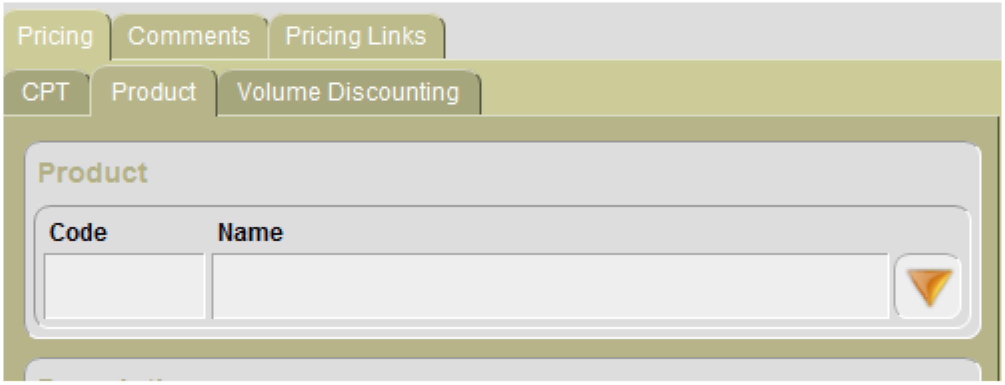
- Once the product is entered and/or ordered, the product and price need to be entered into a Contract.
  - Go to the **Contracts** menu.
  - Choose the contract you want to add the product to.

Contract Name	Type	Patient Plan Name	Expires
Default Bellevue Pathology Lab	G		12/31/2018
Default Medical Clinic of NM	G		12/31/2018
Medicare MCNM	GC		12/31/2018

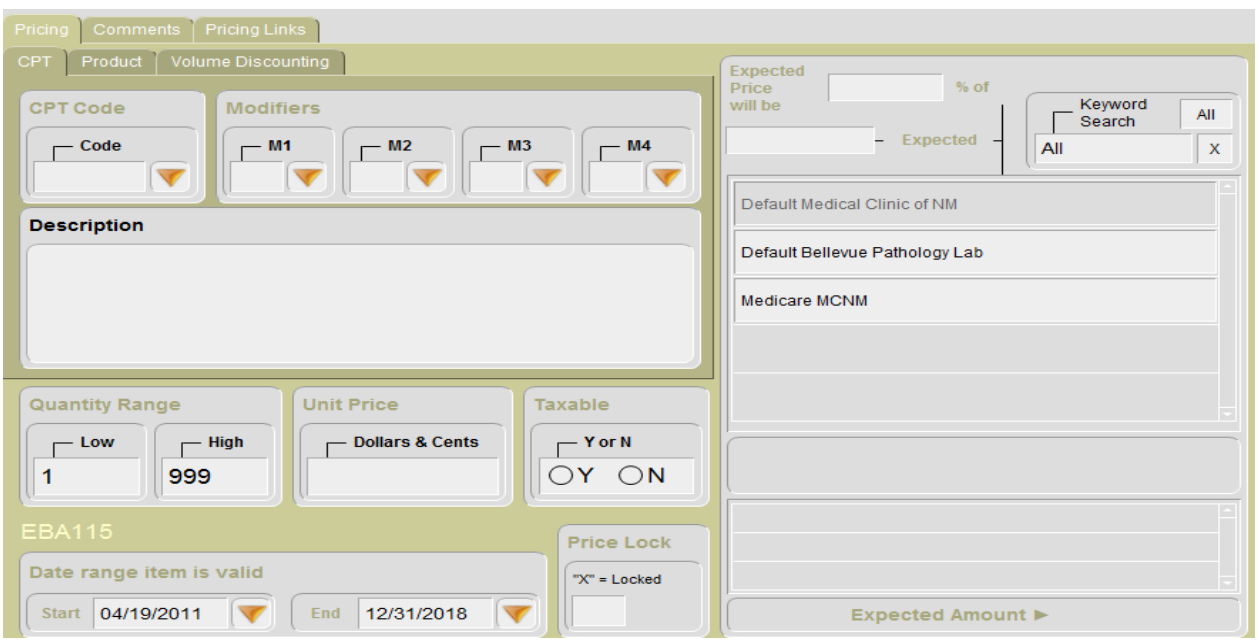
  - Go to the **Pricing** tab.
  - Click the green plus icon to labeled "**Create New Item Price**" to create a new price schedule for this contract.



- On the **Product** tab, choose the product you want from the list.

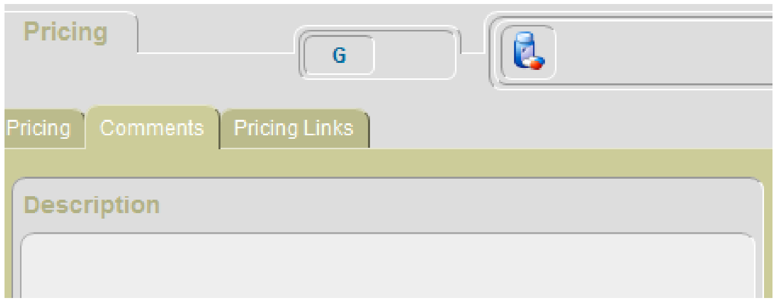


- On the **CPT** tab, add the correct CPT code and "Modifiers", "Quantity Range", "Unit Price", "Taxable", "Date range item is valid", "Price Lock" and "Expected Price" percentage, if applicable. Then, choose the correct contract from the list on the right side of the screen.



- If there is Volume discounting, go to the **Volume Discounting** tab and enter in the discount information.

- You can add comments on the **Comments** tab.



- The **Pricing Links** tab shows how the price is linked to the contract.