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Getting Started

To access PharmaClik, you must launch your Web browser and type the following information in the address bar: https://www.clients.mckesson.ca

This brings you to the PharmaClik login page. Enter your Username and Password, and click Login to launch the PharmaClik homepage. You are ready to begin.

Click Contact Us to view McKesson Canada Customer Service numbers.
A - Discover your Home Page, *in brief...*

### Sections of the Home Page

1- The Search Field

- Search the Complete Catalog or the Home Health Care section. Search by product description, DIN, item #, Vendor Name, AIG, GTIN, Generic Number, etc. and let the search engine suggest matching products.

2 - Missing Narcotic Signatures

- Click to view how many Narcotic invoices need to be signed.

3 - Orders ready to sign

- Click to view and sign your Narcotic orders, after they have been marked as verified by a technician.
A - Discover your Home Page, *in brief...*

4 - Orders, Returns, Finance, Catalog and Services

Click the **orange double arrows** to hide or unhide the menu. This menu is visible on the Home Page. On all other pages it will be visible by clicking the **blue double arrows**. Note: For wide screen resolution the menu is displayed left-hand side. For smaller resolution the menu is displayed in the upper left-hand side in a breadcrumb style like shown here.

- Provides access to Order Management, Order Management Archive, Upload orders, Back-Order Management, Pre-Booking Management, Promotion List, Template Management and Create Order.

- Create returns, obtain approval via the web, review return policies and be informed of any product recall.

- Review past invoices, sign narcotic invoices, download invoice information to your management inventory system and access statistics on past purchases.

- Export and download the catalog, view clearances, manage your retail prices and display any product family group or Private label catalog information.

- Provides access to Patient Care Services and Specialty Community Network (formerly named Specialty Care).

5 - Inbox, Messages and My Profile

- The **Inbox** link provides access to all functionalities related to messaging. View received, sent messages, send messages and contacts for received/sent messages.
  - Read the latest messages sent to your attention, by clicking the **blue subject line**.
  - Clicking on the latest message will also provide access to all messaging options.

- Click the **My Profile** link to access your account(s) information, preferences, User and password Management.
A - Discover your Home Page, *in brief...*

5- Help, Logoff, Account folder, Shopping Cart and Current Order.

To end your PharmaClik session correctly, you should always use the log off icon of PharmaClik located in the upper right corner of your PharmaClik Home Page.

- Clicking [X] of your Web browser closes your window and terminates your session, **but does not log you off** and your session remains valid for the next 20 to 30 minutes. If you try to open a new PharmaClik session within this time, the system may lock the order you were working on.

### Help

- At any time during your session, you can access definitions, detailed explanations and much more by clicking on the Help link located in the upper right corner of the screen. This User Guide will be displayed. Click your topic of interest in the table of content to the left to view detailed information including a general description of the sections, fields and abbreviations definitions, as well as explanations of various search tools.

- The account folder provides access to all the accounts for your PharmaClik user name. Select the one you wish to work with by clicking the dropdown menu.

- The shopping cart indicates how many items you have in the current and active order and provides access to your order summary.

- Current Order indicates the order number (and PO number if required) with which you are currently working. This field could also indicate Select an Order if you do not have any current order.
6 - Pre-book, Clearance, Items under Allocation and New Products

- **Pre-book** provides access to Pre-book beginning or ending this week.

- Click **Clearance** to discover items cleared with a lower price.

- Click **Items Under Allocation** to view items under restricted quantities.

- **New Products** provides access to newly offered products. Click the magnifying glass to view additional details and the shopping cart to order.

7 - Product Availability Notices (bottom of Home Page)

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Notification Date</th>
<th>Availability Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>635201</td>
<td>ADVIL CHILD BLUE RASBERRY 100ML</td>
<td>2014-05-08</td>
<td>2014-05-16</td>
</tr>
</tbody>
</table>

- Monitor product availability by creating your own availability tracking list for products back in stock and once displayed on your Home Page click the shopping cart to add items to an order.

- Click  🗑️  to delete the product from the list.
B- Searching the Catalog

Use the search field to search the catalog from any Pharmaclik page.

The search field provides a multitude of different combinations to search the catalog. Enter a value as proposed in the search field, i.e.: Product Name, DIN, Vendor Name, Item number or a description. Select the Catalog you wish to search for and let the engine do the rest!

Click the dropdown arrow next to All and search the entire catalog with All. Click Item Number or Customer Product Number to search specifically for the entered value. Enter any of the suggested possibilities such as Product Name, and click the Magnifying glass or press Enter on your keyboard to obtain the list of matching products.

The search engine suggests different matching possibilities. There is no need to type an entire description, for example.
A pre-filtering tool, **Your selections**, is available in all search views providing the ability to automatically display **Active** or **In Stock** items.

Unselecting the Active filter will display all status items.

1. Narrow your search results by clicking one of the categories in the filters.
   Click a specific filter to return to the complete search results. Select and unselect categories as required.

   **Note:** For smaller screen resolution, click the orange arrows to display filtering options.

The two automatic search filters (Active and In Stock) may be customized in **My Profile > Preferences > Filtering options.**
Priority Indicator Filter

From the search results page, customers part of a voluntary program can now filter search results by the Priority Filters. This indicates an unauthorized product in the voluntary program.

To order your priority products:

1. From the search results page, click one of the Priority Filters to narrow your results to the priority products in your voluntary program.

   Notice the number of search results has been narrowed down to 15. Once the filter has been selected, the list of priority products is displayed.

2. You can also use the priority item filters to filter results based on priority level. They are located lower down in the list of filters.

   Note: The filters can be used separately or together.
Priority Indicator Filter (continued)

3. Click the expand/collapse icon to display the priority.

You can also click the magnifying glass icon to view additional details.

Product details will indicate the inventory level and allow you to add the item to your shopping cart.

4. Click the shopping cart icon to order the priority product of your choice.
1. Click anywhere on a line to display additional details, or click again to hide the information, OR click the magnifying glass to obtain further additional details:

On the **Pricing** page, valuable information, such as retail price, your retail price structure, regular price, specials, and promotions can be displayed.

The **Product Info** page displays the item information such as the form of the item, for example, 'liquid'. It also identifies if the item’s drug schedule, measurement information, vendor information, etc.

The **Classifications** page displays the generic name of the item, if applicable, the therapeutic class details, active ingredients and dosage.

The **Additional Information** page displays Health Canada Information, such as recall information or notice on the item.

**Suggestions**

The right of the page displays alternate similar item suggestions for products. This will be valuable information when certain products are not in stock.
1. Click (Quick Add) to add the product to your current order or create a new order by following the prompts from Pharmaclik.

Click to display a warning message. In this example the warning displays: ‘This product has less than 6 months of shelf life’. Please make the habit of displaying messages before ordering to avoid ordering discontinued products. Such products are displayed to inform our customers of recently discontinued products.

The small icons located on top of the Vendor column provide additional product information. Hover over the icon for icon description.

When displayed, click to view the image of the product. Other pictures of the product may be available when clicking the additional details for the product.

4 - More Search Results

1. Click a number or an arrow to display more search result pages.
**5 - Search Views**

**View 1: Basic**

The **Basic** view is displayed below. By clicking the view drop-down menu, various search views may be selected. Each view will provide additional information to what is displayed in the Basic view.

**Note:** The last view selected will automatically reappear when re-accessing PharmaClik.

**View 2: With Customer Product #**

The **Customer Product #** view pertains only to customers who use customer product numbers in their establishments. Two additional columns will be displayed in the search results: **Customer Product #** and **Price**.

**Note:** The Price column will reflect the best price available; however, it may differ upon confirmation of the order.
View 3: With Price

The Price view will display two additional columns, one for indicators and another for the price.

Note: The Price column will reflect the best price available; however, it may differ upon confirmation of the order.

View 4: More Details

The More Details view will provide more detailed information over two lines for each result. The second line for each entry will display any applicable indicators as well as the vendor name.

Note: The Price column will reflect the best price available; however, it may differ upon confirmation of the order.
**Expand / Collapse**

Two arrows, which appear next to the number of search results, provide the option to expand or collapse the search results.

Expand  Collapse

When the search results are collapsed the items will be listed without showing additional information.

- The arrows next to each item will appear like this:

```
   Item #
```

```
  67819
  711663
  27106
  731000
  713115
```

However, when they are expanded additional information will be displayed as shown below.

The arrows next to each item will appear like this:

```
   Item #
   DIN/NPN
description
   C/A
   Status
   Inventory
```

<table>
<thead>
<tr>
<th>Item #</th>
<th>DIN/NPN</th>
<th>Description</th>
<th>C/A</th>
<th>Status</th>
<th>Inventory</th>
</tr>
</thead>
<tbody>
<tr>
<td>67819</td>
<td>2273381</td>
<td>AMLODIPINE TB 10MG 100 APO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>711663</td>
<td>2297493</td>
<td>AMLODIPINE TB 10MG 100 CO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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5 - Search Views (continued)

View 5: Thumbnail

The Thumbnail view now includes the **Vendor name** for each result.

6 - New Products

New products are displayed in the **lower right-hand side** of the **Home page**.

- Click the **orange arrow** to display the next new product.
- Click the **shopping cart** to order the product or click the **magnifying glass** to display additional details.
- Click **View Detailed List** to display the complete list of new products.
The new version of Pharmaclik is designed to simplify the ordering process by enabling the ordering functionality on multiple pages. Wherever you see a shopping cart, you can create a new order or add products to an existing order.

1. Creating a new order

1. Step one (1) for creating an order can be performed with five (6) methods.

   - **Method 1**
     The Home Page, by clicking on the shopping cart of a new product.

   - **Method 2**
     The Search Results page by clicking Quick Add.

   - **Method 3**
     In the item additional details page, by clicking Add items.

   - **Method 4**
     In the item additional details page, by clicking on the shopping cart for one of the suggestions.

Continued on next page
**Method 5**

By clicking the **Select an Order** in the upper right corner of the PharmaClik page:

The **Select an Order** dialog box is displayed.

1. Click **Create Order**.

The **PO** field is displayed.

2. Enter the **PO number** or a **name** to identify your order (optional).

3. Click **Create Order** to create your order.

The **Item Order Detail** window is displayed.

4. Enter the order **quantity** and change the **modality** if required.

5. Click **Add item** to continue.

The **Order Summary** is displayed. You have two choices:

6. Click **Close** to continue ordering, OR

   Click **Order Details (Checkout)** to transmit your order.

   *(See **Order Checkout** process to transmit your order.)*

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The upper right-hand side of PharmaClik will indicate that a current order is unsaved.

4. To add products to the current unsaved order, search the catalog (See section B) or click the Shopping Cart to go to Order Details screen to use the Quick Add feature.

5. Click Quick Add.

6. Add the products by entering the item or GTIN # and the quantity required. Add as many items as up to 300. The window will automatically be enlarged to allow adding additional products.

7. Click Add items. To transmit your order you will now have to checkout the order. (See Order Checkout process to transmit your order.)
This indicates your new order has been created, is active and it is your current order. You may continue adding products as you wish.

2 - Continue adding products

Click to continue adding products to your order, or perform another search to locate a desired product and click the shopping cart to add the product to the order.

Perform steps 5 to 7 on the previous page to continue.

Continued on next page
The checkout process is the order transmission process where verification and review takes place. Through this process, you will have the opportunity to verify warnings, such as being notified for non-returnable items.

To proceed to checkout, go to **Order Details (Checkout)**. There are two (2) methods to go to **Order Details**:

**Method 1**

1. **While in your order and having added the last product**, click **Order Details** from the **Order Summary** window **OR** from the home page click the **shopping cart** and **Order Details (Checkout)**.

**Method 2**

1. **While doing other tasks** in PharmaClik and, you wish to transmit your open order. Click **Menu** on the left-hand side of any window to open the menu. Hover over **Orders** and click **Order Management**

From the **Order Management** window, select your open order and click the **magnifying glass** to display **Order Details**.
Trick: Products can be added to an order while proceeding to checkout. Click \[\text{Quick Add}\] to proceed. The Quick Add menu is displayed.

Enter the item or the GTIN # and quantity and click \[\text{Add Item}\]. Enter the number of desired items and keep on adding products up to 300. The window will automatically enlarge to permit continuing adding products.

Click \[\text{Checkout}\] either at the top or the bottom of the Order Details screen.

You are entering the Ordering Checkout Process.
If the **Items Validation** screen is displayed, there are errors that need to be corrected.

1. Click to display the error message.

2. Proceed as indicated in the error message. In this example, the product should be deleted by clicking on the trash button, as the product is no longer available.

3. Click **Continue Checkout**

**NOTE:** If more than one error occurred on the same product, PharmaClik displays the **Items Validation** screen again after clicking **Continue Checkout**. Process errors as indicated above.
If your Pharmacy is part of a Voluntary Program which include narcotics, when ordering such products, some suggestions may be provided during the checkout process. If this is the case, the following screen will be displayed:

1. Click the **warning sign** to display the message.
2. Click **Continue Checkout** to continue to the next step.

The **Order Review** screen is displayed. Through this process, you will have the opportunity to verify alerts. Note you can click **Continue Checkout** if you do not wish to take action on the warnings.

1. Click the **filters** to display the products by category.
2. Proceed to modifications if required. Repeat step 1 to verify any **warning** and take action as required.
3. Click **Continue Checkout** either from the top or bottom of the screen.
The purpose of the **Warning Review** screen is to ensure all warnings and Custom warnings are reviewed prior to final checkout. If your account is set for customized warnings, they will be displayed in this screen if the maximum quantity or maximum amount is exceeded.

1. Click the different **Warnings** and **Custom Warnings** (if you have set some in your account info), to display the related products.

2. Change the **quantities** or **units** if required.

3. Click 🗑️ if you wish to delete a product or click 🪐 to view additional details or suggestions for a product. Note: after verifying, click **Order Details** to go back to the final checkout screen, your active filters or Custom warnings will remain.

4. Click 🔄 Continue Checkout to continue to the next step.
All narcotic orders require a pharmacist’s signature.

Therefore the signature screen will be displayed as shown:

At this point you have two options: Sign or Cancel.

1. The pharmacist can sign the order by typing the digital signature in the signature field and clicking **Sign**, OR
2. Click **Cancel** the order remains **Open**, and will be **placed** in the list of orders in the **Order Management** menu. The order will remain accessible from the **Order Management** menu. To sign, go to **Order details** and complete the Order checkout process.

After signing the order, the Order confirmation message will be displayed as shown in the above screenshot.

Your order has been successfully submitted and placed in the Order Management screen.

Once the order has been confirmed through the checkout process, the **Current Order** button will be replaced by the **Modify** button.
If the account chosen originally for an order was not the good one, it is now possible to change it while in the checkout process.

1. Click the **account dropdown** menu to select the proper account for this order.

2. Click [Continue Checkout](#).

3. Click **OK**.

PharmaClik returns to the Order Management page and displays this message indicating the original order was deleted and that a copy of this order was created for the other account.

4. Select the **proper account** for the order, in the upper right-hand side of the screen.

PharmaClik will display the Order Management for the account selected.

5. Click ![Continue Checkout](#) to proceed to checkout as usual.
Click the double arrows to the left of any screen and hover over Orders. Click Order Management.

Once in the Order Management menu, all of your orders are displayed.

To modify orders (change quantities, add or delete items), click the magnifying glass. Note: Delivery code and PO # can only be modified on Open orders.

1. Click any filter category to narrow search results.
2. Click the magnifying glass to view order details.

From this screen you can Delete or Copy your order by clicking the appropriate button.

3. To modify or send your order, click Checkout.
2 - Order Management - View / Delete / Modify / Copy / Archive orders

Modifications on orders are allowed when the order status is appropriate for modification.

Order status:

Open: The order was created but has not been transmitted. You need to click the magnifying glass and click Checkout to transmit it to McKesson Canada.

Modified: When the status is Modified, you must click the magnifying glass and click Checkout to transmit your order to McKesson Canada.

Confirmed: The order has been received by McKesson Canada and can still be modified if required. Click the magnifying glass and click Checkout to modify your order.

Closed: The order has been received and processed by McKesson Canada. At this stage, an order can no longer be modified.

Archived: The order has been archived by the user and can be found in the Archived Orders menu.

1. To modify an order click the magnifying glass and start by reviewing the order details. (add products, change quantities, delete products).

2. Click Checkout to modify or delete your order.

From this point you will be completing the check out process. For detailed instructions, go to Order Checkout Process.

To archive closed orders from the Order Management page, click the file.

3 - Order Management - Archive

This feature allows you to view the archived orders.

Click the double arrows to the left of any screen and hover to Orders and, click Order Management Archive.

Once in the Order Management Archive menu, all your archived orders are displayed.
4 - Upload Orders

This feature allows you to upload orders to Pharmaclik.

Click the double arrows to the left of any screen and hover to Orders and, click Upload Orders.

1. Click Browse to locate the file on your PC. Clicking on “Browse” opens a window asking customer to choose file for upload.

2. Locate file and click Open.

3. Click Upload Orders.

IMPORTANT: Only shows default file path for user even for multiple accounts under same username.
The Order appears in PharmaClik Warning Checkout screen.

4. Review the order and warnings.

5. Click **Continue Checkout** to submit order to McKesson. NOTE: The order file does not automatically get renamed to a back up file.

Customer **must** locate the file on their computer after uploading and **must** rename it to a **.bak** extension.

Note:
- If the order files are named medis.ord by a 3rd party and the customer misses this step, the new medis order file can append to the old one and customer can get both new and old orders.
- If the order files have unique name (e.g. PO123.ord, PO124.ord) and the customer misses this step, they could accidently pick an older PO and upload an old order.
- Some 3rd parties have function to append or delete the old medis.ord before uploading new file.

6. Locate file and right click on it.

7. Click **Rename** and rename it with **.bak** extension.
Duplicate Order Notification

If the same order is uploaded within 14 days, the customer will see a screen similar to below:

Order is considered the same if:

- The first 140 characters of the order file match an older upload
- The order file contains a match for account number and PO number

1. Select Yes.
2. Click Continue to continue to order checkout.

NOTE: Clicking “No” from the process drop down box will cancel the upload.

Sorting orders

When orders are uploaded, it may be helpful to sort them in the same order they were uploaded and this new feature will help manage orders and ease up the verification process.

Click the double arrows to sort the order in the same sequence as originally input in the uploaded file.

Note: If the file was split on upload because of errors, the sequence may show missing numbers.
Web Services Ordering

Customer uses 3rd party Webservices ordering to create the order files. Once the order is created, an order file is automatically sent to PharmaClik. The user will find this order in Order Management. The order will have an Open status.

1. Click View Additional Details to proceed to checkout.

2. Click Checkout to submit the order.
# 5 - Back Order Management

This feature allows the user to view items backordered the day after the order has been processed by McKesson Canada. You can modify the quantities or remove the products from your back order list.

**Click the double arrows to the left of any screen and hover over Orders. Click Back Order Management.**

1. Click **Print** to print the list of items in your back order list.
2. Modify the quantity of the back order product by **overwriting** the number in the **Qty** field.
3. Click the checkbox listed in the **Del** column to delete the back order item from your list.
4. Click **Save** to save all modifications.
5. Click **any product** to view additional details.

**Click Close to go back to the list of back orders.**
6 - Pre-Booking Management

This feature allows the user to manage all Pre-book orders. There are 2 ways to access this function:

Option 1

Click the double arrows to the left of any screen and hover over Orders. Click Pre-Booking Management.

Option 2

Click the Pre-book directly on the Home Page.

The Pre-Booking Management page will be displayed.

1. Enter a McKesson Canada Promotion # in the search field and click the magnifying glass.
2. Click the McKesson Promotion # to display additional details.

3. Click one of the options to print in a preferred format or to export to excel.
4. Click the dropdown menu to sort by Item #, Vendor Name, Product Family Group, Description, Section or Description/Ord Qty.
5. Enter the Position at information.
6. Click Search to display the information as preferred. OR
7. Click Modify Order to modify your Pre-book order (see next page for modifications).
The next fields are available for modifications:
1. Enter your **PO Number** to change the identification of your Pre-book order if required.
2. Click **Save**.
3. Enter a the **From (current) and To (new) shipping date** or select them by **clicking** on the **calendar** icon. (Optional feature depending on account settings)
4. Click **Save**.
5. Enter a **quantity** or **overwrite** the **quantity** in the Ord Qty field.
6. Click the **Del** checkbox if you would like to delete the product form the Pre-book order.
7. Click **Save all** to keep all your modifications.
7 - Promotion List

This feature allows the user to manage promotions.

Click the double arrows to the left of any screen and hover over Orders. Click on Promotion List.

The default display is the current list of Promotions.

1. You may select the promotion type: Current or History.
2. To find a promotion related to a specific item, Enter an item #.
3. Click if you have made changes to the default display.
4. Click the magnifying glass to display the list of products in the promotion.

Follow the steps in the Pre-Booking Management section to continue.

8 - Template Management

This feature provides the ability to create orders from order templates which can be reused indefinitely. Templates are managed from the Template management menu.

Templates are created from existing orders.

1. To create a template, display the Order Details screen and click Copy as Template to create your template.

Once created you will have access to managing them: modify quantities and/or selling units, add a product (line), delete a product (line), view product information.
F – Orders ready to sign

View directly from the Home Page, all orders marked as verified by a technician at your location and requiring a pharmacist’s signature to be processed by McKesson Canada.

1. Click the magnifying glass to go to order details.

2. Click Checkout

3. Go to Order Checkout Process which outlines steps for Narcotic Signature.

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G - Returns

This feature allows the user to verify the status of a returned product or review/print the status of all requests for credit (RFC). It also allows to modify or delete an request for credit. Statuses of RFC’s can be:

**Open:** An RFC is created locally on customer’s computer and has not yet been sent for pre-authorization to McKesson Canada.

**Waiting for Authorization:** Depending on the return policy, a customer’s RFC may require pre-authorization from McKesson Canada. If so, this message will be displayed.

**Ready:** McKesson Canada has accepted the RFC from customer. The RFC form may be printed at this point and customer must enclose it with the goods to return to McKesson Canada.

**Ready/Printer:** McKesson Canada has accepted the RFC and the customer has been assigned a claim number. It also indicates that the customer has printed the RFC form.

**Processed:** McKesson Canada has received the returned goods.

**Credited:** Indicates the credit for returned goods has been applied to the customer’s account. The details of a credited return can be viewed for 14 days

**Deleted:** If a RFC gets deleted by the customer, the status becomes “Deleted”.

**Note:** Customers must wait for the RFC to be credited to their account before deleting it, unless they want to cancel the return. If McKesson deletes a return for customer in PharmaClik, the status will be “Deleted by McKesson”.

1 - Return Management

After clicking Return Management, the following page is displayed.

1. Enter a RFC # and click Search to view additional details.
2. Enter item # returned and click the magnifying glass. You may select the Status as required.
3. Click Create Return to create a new return for a product.
   **Note:** Always verify the return policy before creating a new return.

4. Click Refresh at any time to display a refreshed status of all RFCs.
5. Click to modify the RFC.
6. Click to delete the RFC.
7. Click the I to view information.
2 - Create Return

The following screen will be displayed.

1. Select a **reason code** in the dropdown menu.
   **Note:** different information may be required depending on the selected reason code.

2. This field may vary depending on the selected reason code. Enter required information such as: **Inv #** (Invoice), **Lot #** and **Exp date MMYY** (Expiry date), **item # invoiced not received**, **Qty** (quantity) and **U** (unit).

3. Enter the **Item #, GTIN or DIN** and click the **magnifying glass**. Select the item from the result dropdown.

4. Enter the **Quantity** for the specific item to return.

5. Click **Add**.

System may ask for the **Invoice #**. (Optional depending on the reason code - not displayed here)

**Note:** This will be the invoice number for when the item was originally purchased.

Repeat the above steps to continue to add items to the RFC.

6. Click on **“Validate”** to confirm the RFC and to view the estimated value of the credit.

7. Click on **“Accept & Send”** to send request to McKesson Canada for a pre-authorization.
   The confirmation screen indicates the creation of the RFC at that point.

8. Print the RFC by clicking and attach it to the appropriate merchandise to send it to McKesson Canada.
3 - Modify Return

This function allows the user to delete a Request for Return, delete lines, print the Request for Credit (RFC) form or add products (lines) to the request.

1. Select a **reason code** in the dropdown menu if you wish to add more products to return.
   Note: different information may be required depending on the reason code selected.
   A second field may be displayed and will vary depending on the reason selected. Enter required information: such information may be **Inv #** (Invoice), **Lot #** and **Exp date MMYY** (Expiry date), **item # invoiced not received**, **Qty** (quantity) and **U** (unit).
2. Enter **Item #**.
3. Enter **Quantity** for the specific item to return.
4. Click **Add**.

Repeat steps 1 to 4 for each item you wish to modify.
5. Click the check box under the **Del column** if you wish to delete a line item on the RFC.
6. Click **Save**.
7. Click **“Validate”** to confirm the RFC and to view the estimated value of the credit.
   **NOTE**: The validate button changes to **Accept and Send**.
8. Click **Accept and Send** to send your RFC.

The confirmation screen indicates the modification of the RFC at that point.

9. Print the RFC by clicking 📝 and attach it to the appropriate merchandise to send it to McKesson Canada.

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4 - General Policy

This section allows the user to view General Return Policies classified by reason code and also to review general information about returns.

Click the double arrows to the left of any screen and hover over Returns. Click General Policy.

The following screen will be displayed.

Click any of the reason codes to review the return policy.

5 - Detailed Policy

Click the double arrows to the left of any screen and hover over Returns. Click Detailed Policy.

The following screen will be displayed.

1. Select the Return Reason.
2. Click Display Detailed policy to view the details.
This section allows the user to view all products that were recalled by Manufacturers.

Click the **double arrows** to the left of any screen and hover over **Returns**. Click **Recalls**.

The following screen will be displayed.

1. Click the **magnifying glass** to view the details for the recall.

2. Click **Back to Recalls** to return to the list of recalls.

3. Click **Back to Policies** to view the Policies details.

4. Click **Print** to print the Recall information.
H - Finance

The Finance menu will let the user access a variety of financial features such as:

**Invoice History:**  Search, display and print your past invoices and credit notes.

**Missing Narcotic Signature:** Browse through a list of narcotic invoices, which must be signed by the pharmacist.

**Invoices Download:**  Download information on your invoices in a point-of-sale (POS) or a pharmacy application.

**Statement History:**  Search for a specific statement, view and print it or browse through your list of past statements.

**Statistics:**  Generate various statistical reports.

### 1 - Invoice History

Click the double arrows to the left of any screen and hover to Finance and, click **Invoice History**.

The following screen will be displayed.

1. Enter an Invoice # to view a precise invoice.
2. Enter a P.O.# to view a precise PO.
3. Enter or select a From date in the pop-up calendar.
4. Enter select a To date in the pop-up calendar.
5. Click **Search**.

The invoice is displayed in PDF format. By hovering to the bottom right side of the invoice, the below menu is displayed enabling printing, saving and enlarging to full screen.

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2 - Use of Digital Signature Document

The "Use of Digital Signature for Controlled Drug and Narcotic Ordering and Receipts" document

With the Electronic Invoice Signature feature, licensed pharmacists and authorized practitioners were prompted to accept a copy of the "Use of Digital Signature for Controlled Drug and Narcotic Ordering and Receipts" document (subsequently referred to as ‘the Document’) at first log in, after the feature was enabled.

The Document is intended for pharmacists and practitioners only, and it is displayed immediately after the user enters their username and password.

When prompted, the Document requires an immediate electronic acceptance in accordance with the terms and conditions and must be renewed annually. The pharmacist or licensed practitioner must carefully read the terms and conditions, and click I agree to proceed to PharmaClik’s Welcome Page. The pharmacist/practitioner who disagrees with these terms and conditions will be redirected to the logon page. In other words, the pharmacist must agree to these terms and conditions to proceed to order.

3 - Missing Narcotic Signatures

PharmaClik’s Home Page displays the list of outstanding invoices to be signed. It indicates how many invoices are pending signatures.

Note: All PharmaClik users that have access to your account number and are authorized to view or sign the Missing Narcotic Signatures will see the reminder message on the Welcome Page.

If some of your users are not authorized to the Missing Narcotic Signatures, please refer to your pharmacy User Manager to be granted access.

Click the double arrows to the left of any screen and hover over Finance. Click Missing Narcotic Signatures OR click View details directly from the Missing Narcotic Signatures section.
After clicking the **Missing Narcotic Signatures - View** button, PharmaClik displays the list of invoices for controlled substances that are pending. The invoices are sorted by account # and in the following order: invoices verified by an employee presented top of the list, followed by invoices with the least recent to the most recent date. It is important to pay attention to the **Date** column.

The display of the **Missing Narcotic Signatures** page will be different for pharmacists/practitioners than for the other employees, since only a pharmacist or practitioner is authorized to sign the invoices for controlled substances.

**Pharmacists or Practitioners**

1. Click **View** to display a copy of the invoice in PDF format (optional).
2. Select the invoices to sign by placing a checkmark in the **sign** column.
3. Click **Update Selected**.
4. A menu will pop up asking you to enter your credentials. Enter your **logon and password**.
5. Click **Confirm logon password**.
6. Review the invoiced items listed on this page against the items received. **Note:** **Trans #** is the invoice number preceded by the letter I (I for Invoice).
7. If everything is accurate, enter your **digital signature**, and
8. Click **Sign** to complete the narcotic invoice signature.

PharmaClik will return to the list of invoices. The signed invoices are no longer displayed.
Notes:

- It is recommended that the pharmacist keep a record of invoices that have been signed via PharmaClik rather than paper copies.
- If there is any error with the narcotic order or invoice, **DO NOT SIGN** the invoice via PharmaClik. You must immediately contact McKesson Canada Customer Service and follow the instructions of the Qualified Person in Charge (QPIC).

Other Employees

The following section describes the Missing Narcotics Invoices section as seen by an employee other than the pharmacist or practitioner.

An employee may view the invoices and notify a pharmacist that the invoices have been reviewed and require signature, but they cannot sign the invoice.

1. Select the invoices that have been reviewed by selecting the appropriate checkbox **Review** column.
2. Click **Update Selected** to notify the pharmacist that a signature is required.

PharmaClik will return to the list of invoices. The name of the user that reviewed the invoices will appear in the **Reviewed By** column.

**Note:** If you incorrectly notified the pharmacist of an invoice to be signed, place a checkmark in the **Undo Reviewed** column and click **Update Selected**. PharmaClik will return to the list of invoices and the name of the user no longer appears in the **Reviewed By** column.

The review of the narcotic invoice by an employee other than the pharmacist/practitioner is optional. The pharmacist/practitioner’s action of electronically signing the invoice is not conditional to the invoice having been previously reviewed.
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4 - Invoice Download

PharmaClik allows users to download invoices to a POS/PPS system. This acts as a repository system and therefore eases management and accounting operations.

Click the double arrows to the left of any screen and hover over Finance Click Invoice Download.

When clicking Invoice Download the following page is displayed:

1. Select the file format.
2. Click Download to download the invoice. The invoice will download to the bottom left toolbar of the web browser.
3. Click invoice.dat from bottom left toolbar to import and save it.

5 - Statements History

Click the double arrows to the left of any screen and hover over Finance. Click Statements History.

The following page will be displayed:

1. Enter a From date and To date or pick the date from the calendar by clicking on the calendar icon.
2. Click Search to display the statements for the selected dates.
3. Click View to view any Statements History

The statement is displayed in PDF format. By hovering to the bottom right side of the statement, the above menu is displayed enabling printing, saving and screen enlarging.

6 - Statistics

Click the double arrows to the left of any screen and hover over Finance. Click Statistics.

The following page will be displayed. The default report selection is By Product.

1. Select any form of report from the list as required.
2. Type in the From and To date or select the date from the calendar
3. Select the report format.
# Catalog

This section provides access to exporting and downloading the catalog, view clearances and manage your Retail prices.

## 1 - Export Catalog

Click the **double arrows** to the left of any screen and hover to Catalog and, click Export Catalog.

1. Click **Generate** to download the catalog.

Once you have generated the catalog, you have to wait before it downloads. The status indicates the catalog has been generated.

2. Click **Refresh** to verify if you can download the catalog you have generated.

3. Click **Download** to download the catalog to your computer. Once downloaded, click the icon displayed in the bottom left corner of the PharmaClik Export catalog page.

4. Click **Trash** if you wish to delete the catalog. **Note:** This icon will only be displayed after 7 days.
2 - Clearance

View the current clearance offers in this section.

Click the **double arrows** to the left of any screen and hover to **Catalog** and, click **Clearance**.

**OR**

Click **View Details** directly on the Home.

1. Click **any product** to display additional details.
2. Click the **Quick Add** icon to add the product to one order or start a new order.

This feature provides access to managing your retail price structure by product group or by product number.

![Clearance screenshot]

3 - Retail Price Management

Users are able to view or modify the price structure of specific products, view or modify the Price Sticker Service (PSS) options and view, add and delete exceptions with this feature.

Click the **double arrows** to the left of any screen and hover to **Catalog** and, click **Retail Price Management**.
When clicking on Retail Price Management this window is displayed. There are three methods to manage the exceptions and modify the price of items.

Exceptions can be managed by:
1. Enter an item # and click Manage Exceptions.
2. Select a product family group from the drop down menu and, select a Product Family subgroup if you wish to display your Retail Price structure for this Product family group and click Go.
3. Select all, if you wish to view the complete list of your Retail Price Structure and exceptions and click Go.

In this example, the complete list is displayed because the user chose to select all.

4. Click to view the exceptions in your retail price list. The list is displayed (see next page).

The default sort display is by description.
1. Sort the list by Item# if you prefer.
2. Click Go to obtain your preferred sorting display.
3. Click to modify the price.

Continued on next page
4. Overwrite the Forced rate (%) OR the Forced Price ($).
5. Click the calculator icon to calculate the price and verify if you have entered the proper value for the required price.
6. Click the diskette to save the modifications.
7. Click the garbage can to delete the exception.

4 - Family Group

Click the double arrows to the left of any screen and hover over Catalog. Click Family Group.

1. Click in the ‘Select a product family group’ field and make a selection.
2. Click in the ‘Select a product family subgroup’ field and make a selection.
3. Click the magnifying glass to display your list of products.

The list of products is displayed:
J - Items under allocation

This section provides access to the list of products placed under allocation by vendors.

Click any of the suppliers to view the list of products for this Supplier.

1. Click the magnifying glass to display Item Additional Details.

K - Management Functions

The upper right corner of the Home Page or any page provides access to a variety of functions:

1. The Inbox and Messages provides access to all functionalities related to messaging. View received, sent messages, send messages and contacts for received/sent messages.

2. Click the My Profile link to access your accounts information, preferences, User and password Management.

3. At any time during your session, you can access definitions, detailed explanations and much more by clicking on the Help link located in the upper right corner of the screen.

4. The folder provides access to all the accounts for your pharmacy. Select the one you wish to work with by clicking the dropdown menu.
1 - Inbox and Messages

View received, sent messages, send messages and contacts for received/sent messages.

Click Inbox or one of the messages in the Messages section to access your inbox.

Note the number of messages in the Inbox (3) indicator. This indicates you have received three (3) messages.

When clicking on one of the messages in the messages section, the number of messages in the Inbox (2) has diminished from three to two because you are accessing one of the messages.

1. Click anywhere on the message line to display the content.

2. Click Reply to answer the message.
3. Click Delete to delete the message.
4. Click Back to go back to the first screen.

Continued on next page
1. Click **Contacts** to display the list of your McKesson Canada contacts.

2. Click **Send Message** to send a message to this contact. This feature is available with all contacts.

**2 - My Profile - Account(s) Info**

My Profile provides access to all information related to your profile: Preferences, Change Password, user Management and Change Signature. (previously located in the Management section)

Click **Account(s) Info** to access information about all your accounts for your pharmacy.

Continued on next page
1. Click the magnifying glass to display the account’s information.

2. Enter your Order Customized Warnings in this section:
   - Maximum quantity: Enter a maximum quantity per line.
   - Maximum amount: Enter the maximum spend amount per line.

3. Click Save. PharmaClik returns to the previous page. OR if you are not editing the customized warnings:
4. Click Back to account list to return to the previous page.
Preferences provides access to your user information.

Click **Preferences** to access your information.

1. Select your preferences from the different dropdown menus:
   - The **default account** which you will be working with most of the time (if you have more than one account).
   - The **language**.
   - Select **Yes** or **No**, whether you would like for the enter key to react as the tab key.
   - How many **items** you would like displayed when searching.

2. Select your **ordering options** by placing a check mark in your desired ordering options if you would like for PharmaClik to:
   - Check duplicate ordered product.
   - Wait for confirmation when sending order. This will enable the order to remain on Order confirmation screen after final checkout.
   - Show the smallest unit.
   - Split invalid items upon upload.

3. Select your **Filtering options**. By default, these filtering options are always selected:. If you wish you may remove the selected filtered options from your search results.
   - Active status as default product search result
   - Inventory in stock as a default product search result

4. Click **Save** to keep your modifications.
Change Password provides access to changing your user password.

Click **Change Password** to access your information.

1. Enter the following:
   - Your **Current password**
   - The **New password** you would like. The password must contain letters and digits.
   - Confirm the **New password** you would like.
2. Click **Save**. PharmaClik displays a confirmation message.
This function allows the user to consult the list of users for his/her account(s), edit or delete user profiles, reset user passwords, create a user profile.

Click **User Management** to access this functionality.

The list of users for your account is displayed.

1. Click **Create user** to add a new user to your account.

2. Enter the information:
   - First name.
   - Last name.
   - Username.
   - User type.

3. Click **Next**.

4. Click **Select all customer accounts** or select the account by placing a checkmark in the appropriate box.

5. Click **Next**.
6. Select the **functions** this new user will access.
7. Select the **language**.
8. Create the **password** for this new user.
9. Click **Save** to complete the creation of the user.

**Modifications**

1. Click **Edit** to modify the profile. Follow steps 4 to 9 in the **New user** section.
2. Click **Delete** to delete the user.
3. Click **Reset password** to reset the user’s password.
This functionality provides access to changing your Pharmacist digital signature used to sign Narcotic orders and Narcotic invoices.

Click **Change Signature** to access this feature.

1. Enter your **Old signature** in the designated field.
2. Enter your **New signature** in the designated field.
3. Enter your **New signature** in the **Again** field.
4. Click **OK** to save your modifications.