COMPLEX PRODUCTS

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WHAT IS A COMPLEX PRODUCT?

A complex product is a product that is a collection of two or more items (products or services). An example of a complex product is a gift basket made up of a number of products like a shampoo, conditioner and body lotion.

In Hairlink^{SQL} there are four different types of complex products, Kitset, Surgery Macro and Other. The complex product type will usually determine the product's **'EMBEDDED PROPERTIES'**. The user is then able to define the product's **'USER-DEFINED PROPERTIES'**. The embedded and user defined properties together determine the behaviour of the product at billing.

There are several standard terms that are used throughout this document:

- **Master:** This is the name given to the complex product header. This is the name used in all searches when retrieving a complex product for billing.

- **Component:** Components are items that make up the complex products. These items are created individually after which they can to be used in any complex product.

- **Embedded Properties:** These are complex product properties that are embedded into the product type, as dictated by the program, and cannot be modified by the user. The user may be able to "see" some of these properties once a complex product "type" has been selected.

- **User-Defined Properties:** These are settings within the complex product type that the user is able to control. The user-defined properties are available once the complex product type has been selected. Not all functions will be available on all complex product types.
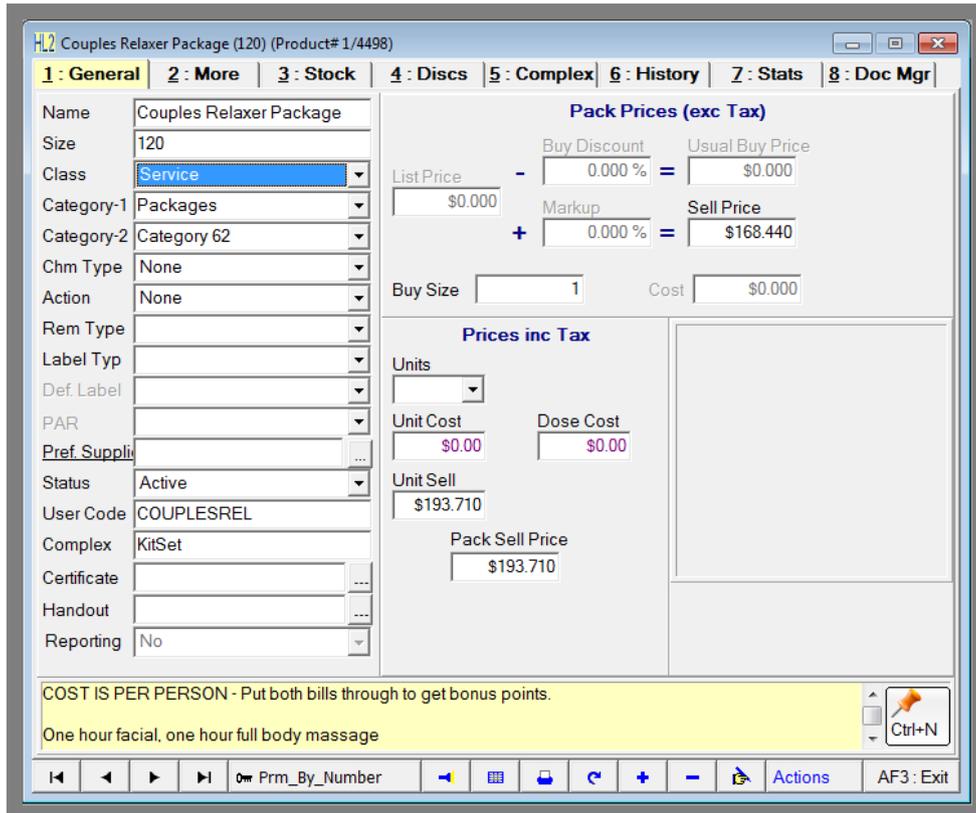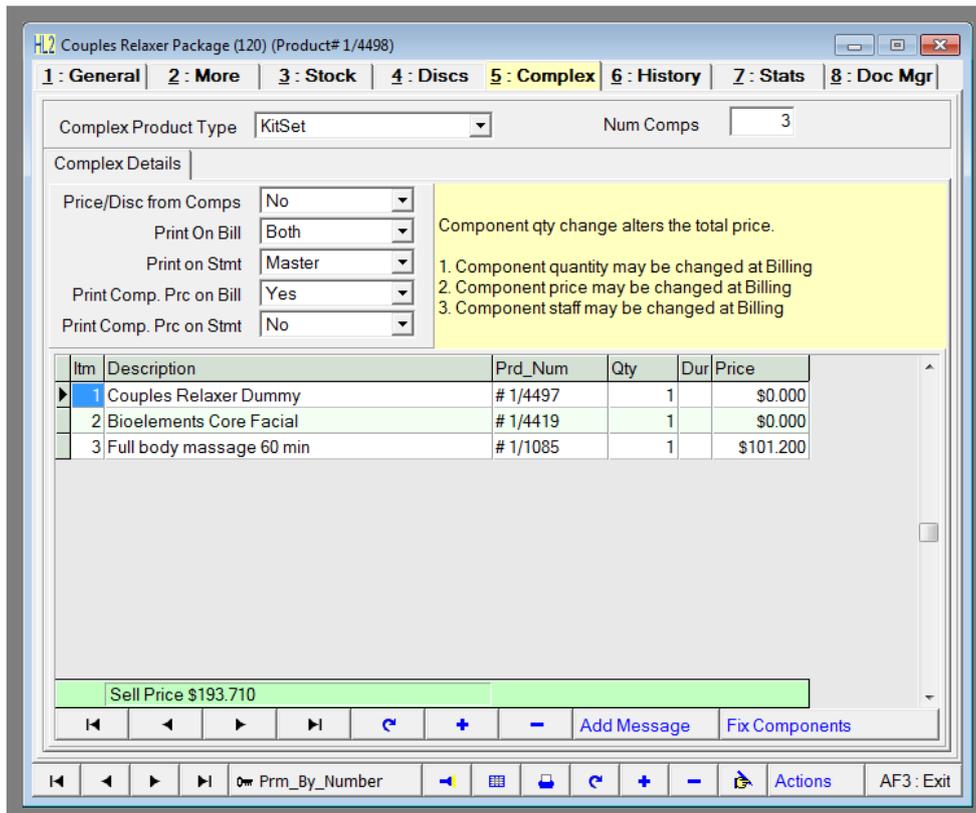
Fig. 5 - 1

Fig. 5 - 2

COMPLEX PRODUCT TYPES

Kitset

'KITSET' is a complex product type that is made up of a number of other products where the Master price **adjusts** when any component attribute is modified on the bill (i.e. Quantity and/or price).

Embedded Properties

- Master quantity may be changed, which will then scale the components.
- Master price may be changed which will then scale the components
- Master may be discounted which will then adjust the component price by same percentage
- Component quantity may be changed which will then re-calculate the original total master price based on the user-defined properties for price calculation.
- Component price may be changed which will then re-calculate the original total master price based on the user-defined properties for price calculation.
- Component may be discounted which will then re-calculate the original total master price based on the user-defined properties for price calculation.
- Only the components affect inventory control.
- Only the components affect sales analysis.
- Component staff members can be changed.
- Deletion of components is not allowed.

User-defined Properties

- Select to print Master only, Master and all components, or just the components.
- The price calculation method is user selectable. It can be fixed by the user to be the pack sell price of the master product, or it can be made to calculate from the sum of the components automatically.
- Printing of component prices on the bill and statement is user-selectable.

Typical & Recommended Use

The KITSET complex product type should be used where the user wants to bill out procedures to reflect exact incurred costs. Other uses include the "bundling" of products that are sold either at a pre-determined price or as the sum of the components. Changing the quantity of the "bundle" will automatically scale the price and the quantities. Some examples are as follows:

Example 1: A procedure is set up to cost $200.00. It is set up with, say, 10 items and the price **IS NOT** calculated from components but is set by the user to $200.00. At billing time, the user modifies the quantity and/or prices of some of the components to reflect actual usage. **The master price CHANGES** and will dynamically re-calculate other component prices to reflect correct weightings.
Example 2: A procedure is set up with, say 10 items and the price **IS** calculated from components. At billing time, the user modifies the quantity and/or price of some of the components to reflect actual usage. **The master price CHANGES accordingly.**
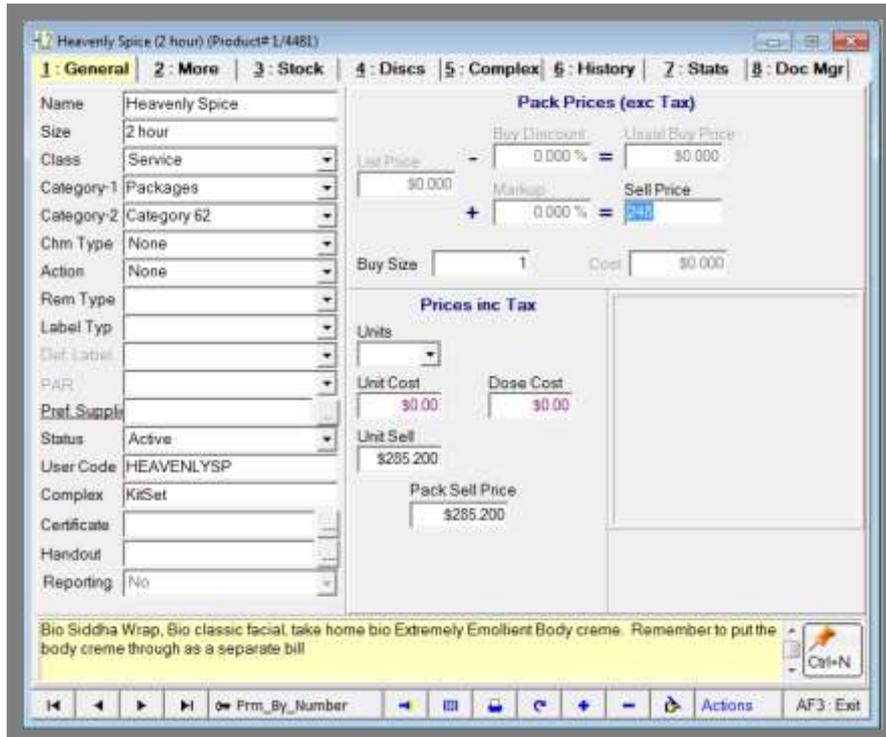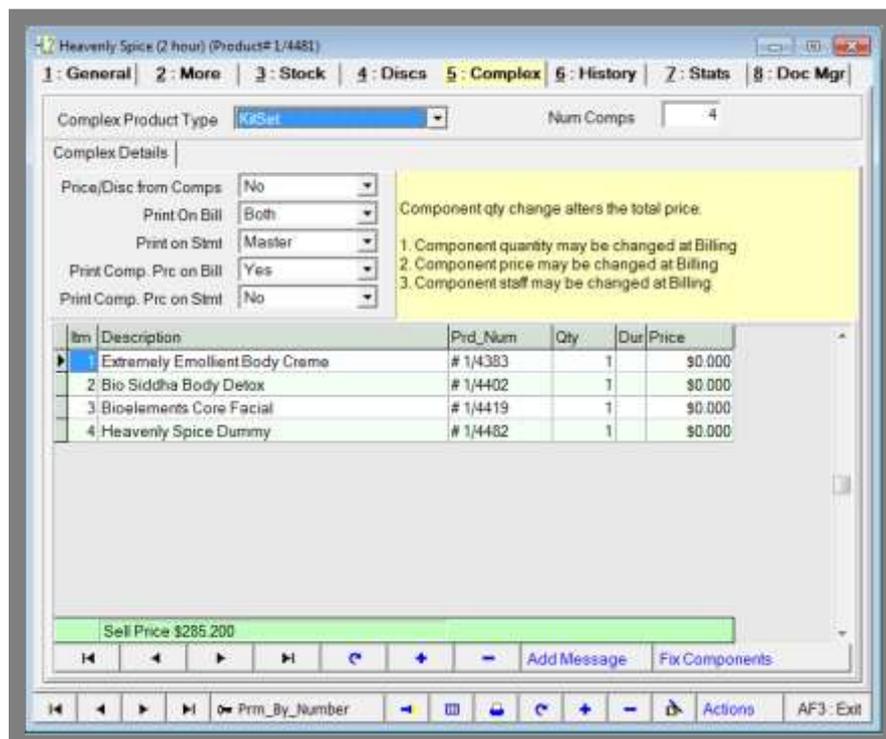
Fig. 5 - 3

Fig. 5 - 4

Surgery

A **'SURGERY'** is a complex product type that is made up of a number of other products where the Master price **remains static** when any component **quantities** are modified. Master price will change if component prices are modified.

Embedded Properties

- Master quantity may be changed on the bill; components will scale accordingly.
- Master price may be changed at billing; components will scale accordingly.
- Master may be discounted at billing, which re-scales components.
- Component quantity may be changed but will not affect master price (main feature).
- Component price may be changed - this will affect the master price.
- Component may be discounted - this will affect the master price.
- Only the components affect inventory control.
- Only the components affect the sales analysis.
- Component staff members can be changed.
- Deletion of components is not allowed.

User-defined Properties

- Can print Master only, Master and all components, or just the components.
- The price calculation method is user selectable. It can be fixed by the user, or it can be made to calculate from the sum of the components automatically.
- Printing of component prices on the bill and statement is user-selectable.

Typical & Recommended Use

Example 1: A particular surgery is quoted at $200.00. The surgery is set up with, say 10 items and the price **IS NOT** calculated from components but is set by the user to $200.00. At surgery time, the user modifies the quantity of some of the components to reflect actual usage. The master price **DOES NOT** change. It re-calculates component prices to reflect the correct distribution. The inventory stays correct, the client "sees" a fixed price regardless of product usage. All sales analysis to the components is true and correct.

Example 2: A surgery is set up with, say 10 items and the price IS calculated from components. At surgery time, the user modifies the quantity of some of the components to reflect actual usage. The master price **DOES NOT** change. All sales analysis to the components is true and correct.

Example 3: In either of the above cases, if the user decides to change or discount the component prices - the master price will vary accordingly.

> **NOTE:** This complex product is designed to be used for fixed price surgery where item usage may vary but the price to the client has to remain the same. The main purpose is to record the correct amount of materials used and update the inventory accordingly.
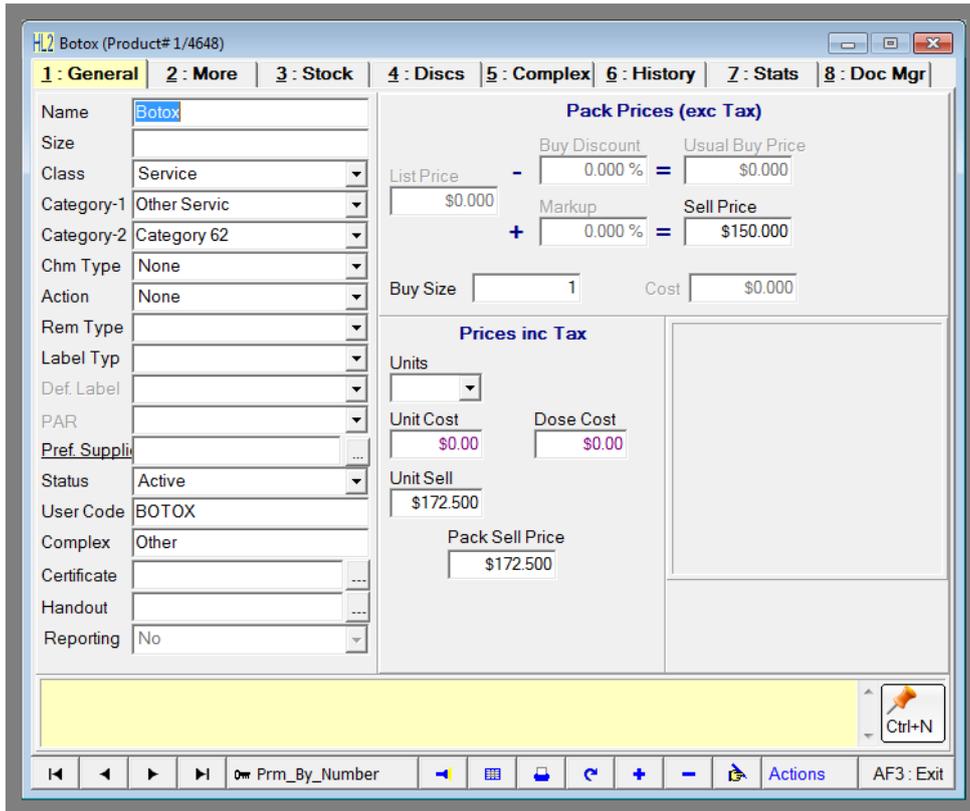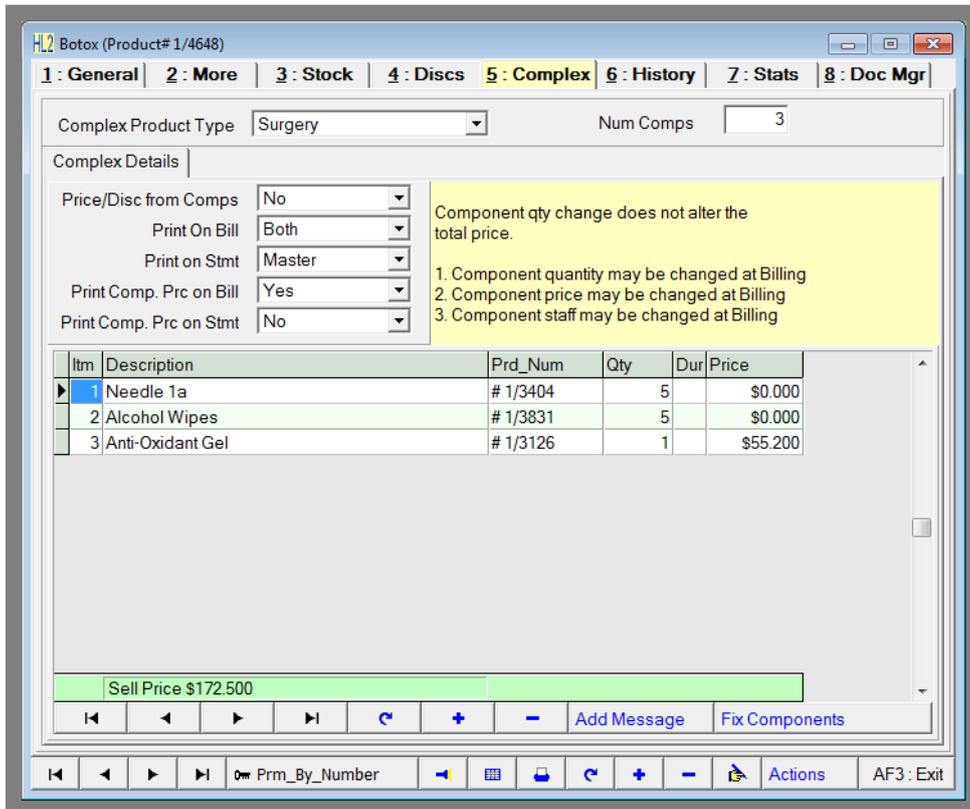
Fig. 5 - 5

Fig. 5 - 6

Macro

A **'MACRO'** is a complex product type that is made up of a number of components that simply populates the billing screen as if the items were entered manually by the user.

Embedded Properties

- Master does not get printed
- All other options irrelevant

User-defined Properties

- None

Typical & Recommended Use

The macro is used where a number of items need to populate the billing screen as if typed in one by one by the user. All items are then editable as required.
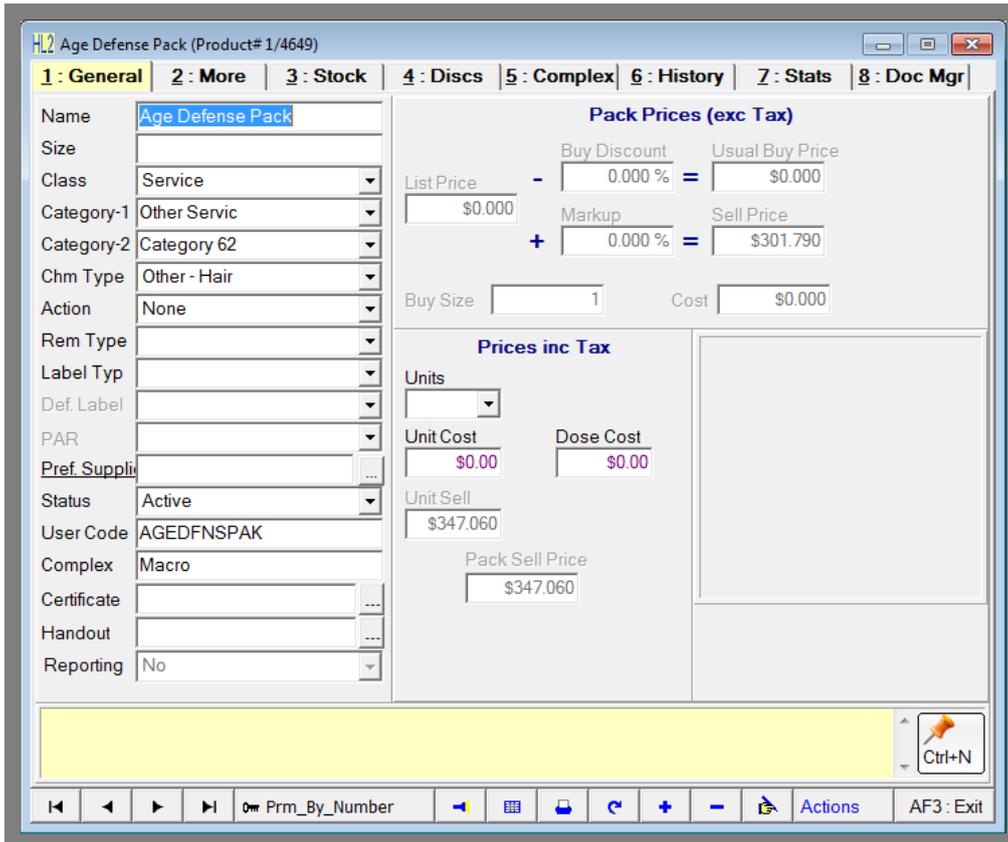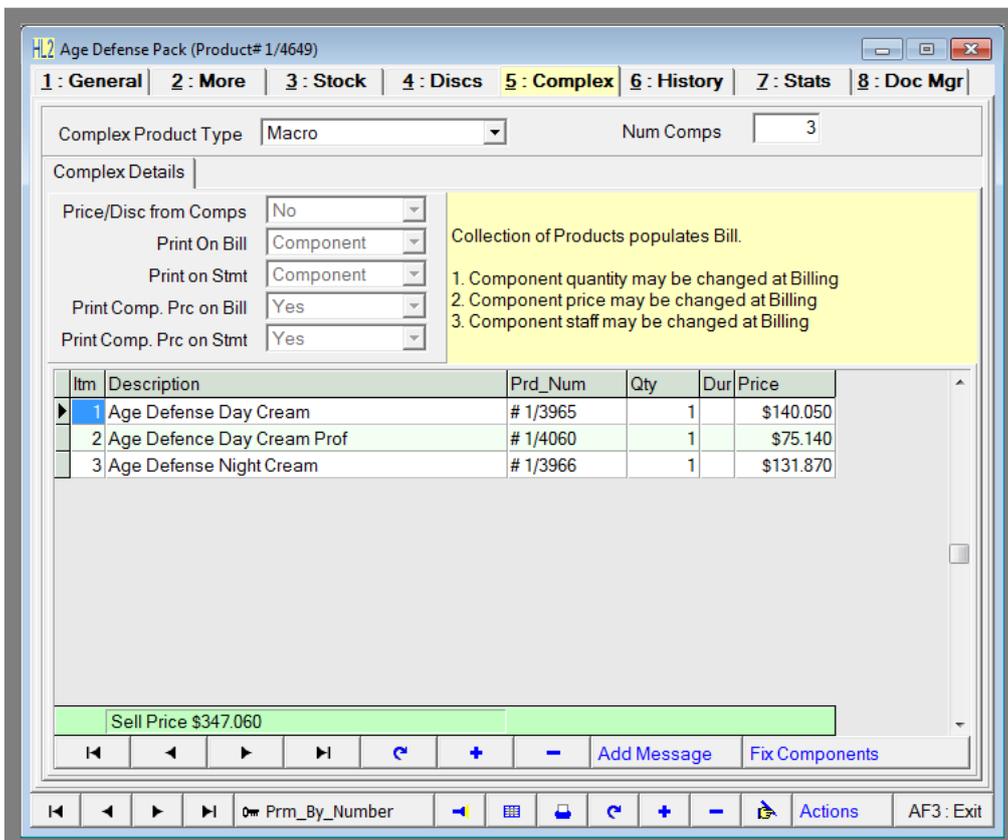
Fig. 5 - 7

Fig. 5 - 8

Other

An **'Other'** is a complex product type that is made up of a number of other products where the Master price **remains static** when any component **quantities** are modified. Master price will change if component prices are modified.

Embedded Properties

- Master quantity may be changed on the bill; components will scale accordingly.
- Master price may be changed at billing; components will scale accordingly.
- Master may be discounted at billing, which re-scales components.
- Component quantity may be changed but will not affect master price (main feature).
- Component price may be changed - this will affect the master price.
- Component may be discounted - this will affect the master price.
- Only the components affect inventory control.
- Only the components affect the sales analysis.
- Component staff members can be changed.
- Deletion of components is not allowed.

User-defined Properties

- Can print Master only, Master and all components, or just the components.
- The price calculation method is user selectable. It can be fixed by the user, or it can be made to calculate from the sum of the components automatically.
- Printing of component prices on the bill and statement is user-selectable.

Typical & Recommended Use

Example 1: A particular surgery is quoted at $200.00. The surgery is set up with, say 10 items and the price **IS NOT** calculated from components but is set by the user to $200.00. At surgery time, the user modifies the quantity of some of the components to reflect actual usage. The master price **DOES NOT** change. It re-calculates component prices to reflect the correct distribution. The inventory stays correct; the client "sees" a fixed price regardless of product usage. All sales analysis to the components is true and correct.

Example 2: A surgery is set up with, say 10 items and the price IS calculated from components. At surgery time, the user modifies the quantity of some of the components to reflect actual usage. The master price **DOES NOT** change. All sales analysis to the components is true and correct.

Example 3: In either of the above cases, if the user decides to change or discount the component prices - the master price will vary accordingly.

Special Notes for Complex Products

- It is very important to realise that any drug used as a component in a complex product will ignore the dispensing fee. If a dispensing fee is required, it may be added separately as a line within that complex product if allowed (eg. Surgery, Kitset).

- A special advanced feature in the HAIRLINK^{SQL} database will automatically "trigger" a price re-calculation on complex products if one of the components has a price change. This applies to re-distributions as well as straight out recalculations.

- Finally, it is very important to note that Complex products should be set up after thorough consideration and consultation. Once set up, and used in a bill, complex products (except Macros) SHOULD NOT be changed to any other product type. Complex products should be marked as **'Inactive'** if they are no longer used.

COMPLEX PRODUCT MAINTENANCE

Creating a New Complex Product

1. Decide which type of complex product you are going to create.

2. Click on the **'Product'** button.

3. This will display the goods and services search window.

4. Click on the **'F7: New'** button.

5. This will bring up the product profile selection form. Select which profile you wish to use and click on **'F12 :Accept'**.

6. Once you have selected a profile the product record will be opened.

7. Enter any relevant information into the product record and then save it by clicking on the red tick button. If you have chosen **'Drug'** as the class you will automatically be prompted to create a complex product with a hidden dispensing fee.

8. Click on the **'Complex'** tab.

9. Select the type of complex product you wish to create in the **'Complex Product Type'** field.

10. Please refer to the next section **'How to Add a Component to a Complex Product'** for information on adding a complex product.

How to Add a Component

1. Open the Master complex product you wish to add components to.

2. From the product record click on the **'Complex'** Tab.

3. Ensure the **'Complex Product Type'** field is filled correctly for the type of complex product you are creating.

4. To add a component, click the plus button **'+'**, immediately below the list of components.

5. The Goods and Services search window will now be displayed. Search for the item you wish to insert as a component.

6. After each entry, click on the tick button, immediately below the list of components, to save the component.

7. When all components have been added, click on the tick button in the very bottom right hand corner of the product record.

How to Remove a Component

1. Click on the **'Product'** button.

2. Search for and open the master complex product you wish to remove a component from.

3. From the product record click on the **'Complex'** Tab.

4. Select the component you wish to remove by <u>**single left clicking**</u> on it with the mouse.

5. To delete the selected component, click the minus button **'-'**, immediately below the list of components.

6. A prompt will appear to confirm the deletion, select **'Yes'**.

7. The component will not be removed from the list but will turn yellow to indicate that it has been deleted.

8. After each deletion, to save the change click on the tick button at the bottom of the window.

How to Change a Component of a Complex Product

The **'Change Component'** function is provided to change components of a complex product. For example you may need to replace the component **'Example Shampoo'** with **'EG Shampoo'**.

1. Click on the **'Product'** button.

2. Search for and open the master complex product you wish to change.

3. From the product record click on the **'Complex'** tab.

4. To change a component click on the **'Change Component'** button.

5. Select **'Yes'** to the prompt to confirm.

6. Search for the product you wish to add.

7. Once you select a product the new item will be displayed in the list of components in place of the old entry.

How to Change the Pricing

There are two ways to change the price of a complex product. Where the price is changed from depends on if the **'Price/Disc from Comps'** is set to **'Yes'** or **'No'**.
If the **'Price/Disc from Comps'** is set to **'YES'** then the actual sell price for the complex product will be calculated from the prices of the individual components. You will need to open each of the components product records, by double left clicking on the component, and then change the unit sell price. After changing the prices you will then need to click on the **'Fix Components'** button on the master product's complex tab to update the price to the total of the components.

If the **'Price/Disc from Comps'** is set to **'NO'** then the sell price for the complex product will be obtained from the 'General' tab of the Master product record under **'Unit Sell Price'**.