



Kohl & Frisch Purchase History Reports

Downloading a Purchase History Report in the Kohl & Frisch Platform

In order to add K&F purchase data to the Narcotics Reconciliation Module you are required to download a CSV report from the K&F platform– this can be accomplished by accessing the Purchase History Report.

To begin, ensure that you are logged into the Kohl & Frisch platform with an account that has administrative privileges, and navigate to the '**Account Management**' tab at the top of the page.

The screenshot shows the Kohl & Frisch platform interface. At the top, the logo for Kohl & Frisch Limited is displayed, along with the tagline "DELIVERING EXCELLENCE". Below the logo, there is a navigation menu with several tabs: "Ordering", "Account Management", "Returns", "Communication", "Program & Services", and "Links". The "Account Management" tab is highlighted with a red box. A dropdown menu is open under "Account Management", listing various options: "Account Balance", "Invoice/Credit Note Inquiry", "Account Statement", "Merchant Services Sales Report", "Tax Report", "Vendor Sales Reporting", "Employee Administration", "Customer Profile", "Purchase History Report", "NAF Outstanding", and "NAF Inquiry". The "Purchase History Report" option is highlighted with a red box. To the right of the navigation menu, there is a "LOGOUT" button. Below the navigation menu, there are several sections: "Pharmaceutical & Recalls", "Flyers, HealthOne, Pre-Books & Programs" (with a link to "PHARMACY SELECT FLYER.P6" and "Expires: Jan 01"), and "Messages & Store Services" (with a link to "NAF eSignature Customer Guide"). At the bottom of the page, there are two bullet points: "Use the Menu at the top to access Ordering, Returns and Account Management functions." and "To exit the system please click on 'Log Out'. Please do not leave your browser unattended when Logged in." There is also a link to "Web Instructional Videos". The bottom right corner of the page has the text "COAST TO COAST".

- Use the Menu at the top to access Ordering, Returns and Account Management functions.
- To exit the system please click on "Log Out". Please do not leave your browser unattended when Logged in.

• [Web Instructional Videos](#)

Upon clicking the Account Management tab, you will see a drop-down list of account options– click on the **'Purchase History Report'** option in the list.

The screenshot shows the 'Purchase History Report' interface for Kohl + Frisch. At the top, there is a navigation bar with 'Account Management' selected. The main form area contains the following elements:

- From Date:** A text input field containing '2021-10-20' with a '(YYYYMMDD)' label below it.
- To Date:** A text input field containing '2022-01-20' with a '(YYYYMMDD)' label below it.
- Search Filter:** A dropdown menu currently showing 'NARCOTICS'. Below it are radio buttons for 'Item Number', 'DIN/NPN', and 'UPC'.
- Format:** Radio buttons for 'Excel File' (selected) and 'PDF (Adobe)'.
- Report Type:** Radio buttons for 'Detail' (selected) and 'Summary'.
- Supplier and Product Type:** Two dropdown menus labeled 'Pick a Supplier' and 'Pick a Product Type', both currently blank.
- Submit:** A red button labeled 'Submit'.
- Footer:** A small logo for 'Adobe Acrobat Reader' with a note: 'This option requires that you have Adobe Acrobat Reader installed. Click on the image for a free download.'

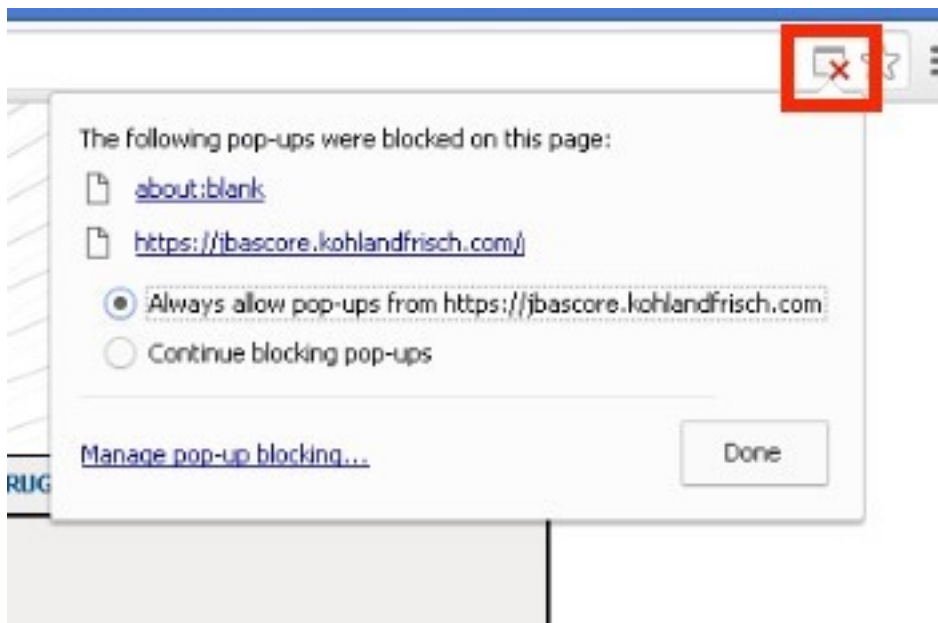
Select the appropriate date range (day of the last count/day of the most recent count)

Select 'Narcotics' (this will include controlled and targeted)

Pick a Supplier and Pick a Product Type will be left blank.

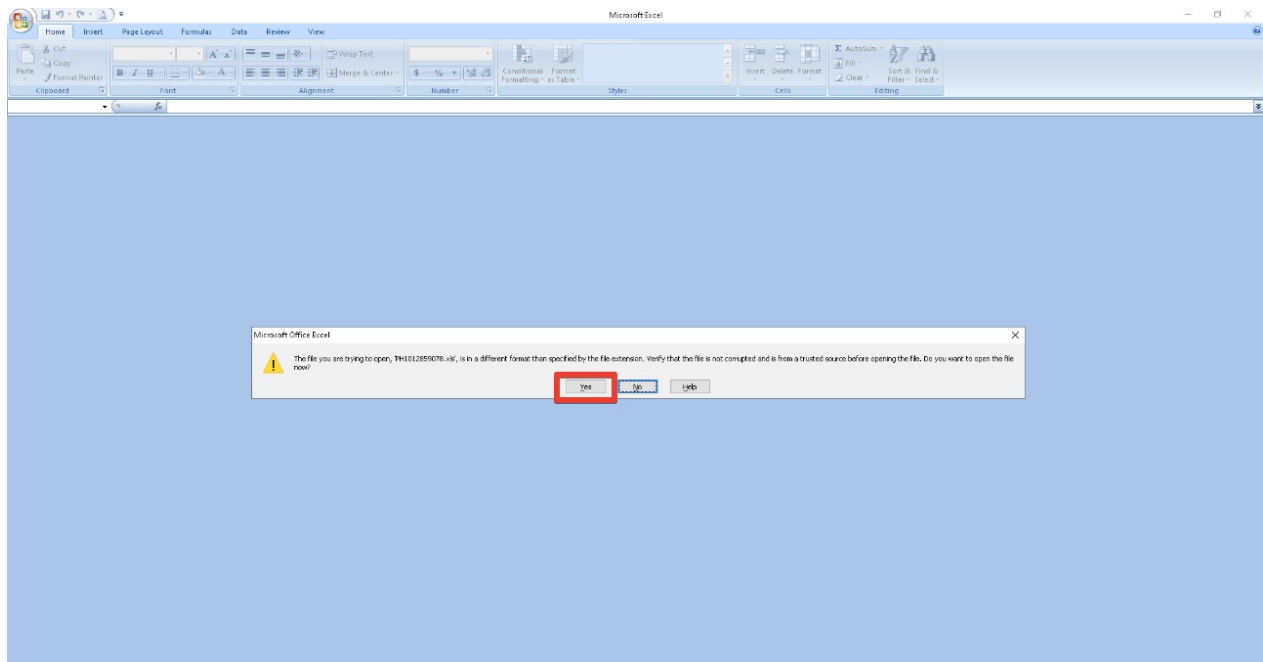
'Excel File and Detail' will be selected and then 'Submit'.

****NOTE: If nothing happens you may have a pop-up blocker set up.**

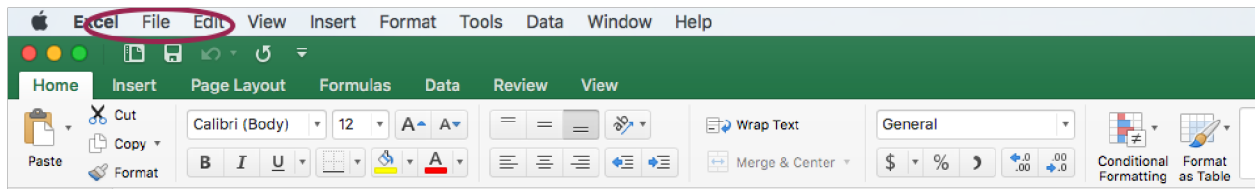


In Google Chrome you can turn off the pop up blocker by clicking here.

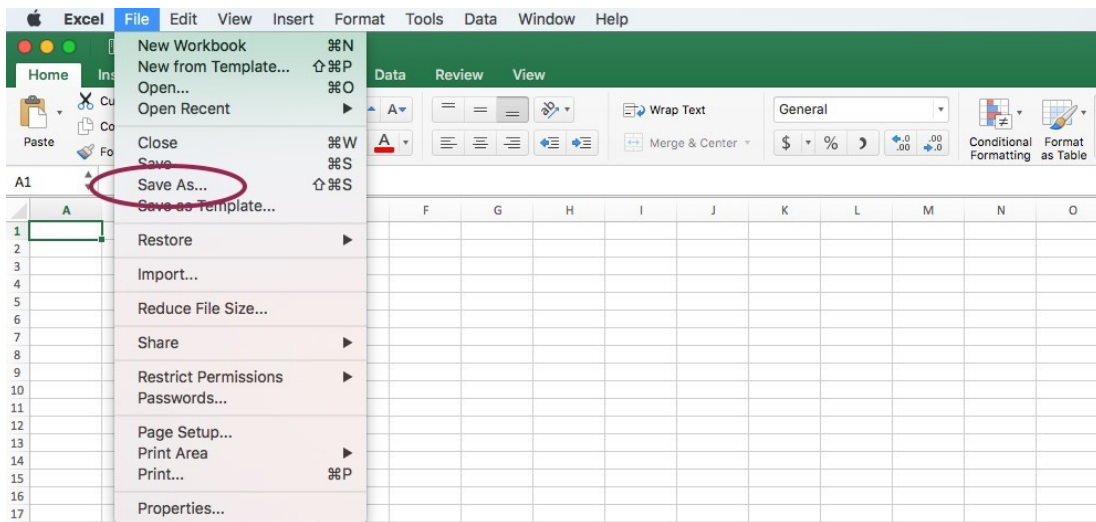
****NOTE: You now need to convert the file to CSV format- the report format that K&F exports is a format that the iApotheca platform is not readily able to read.**



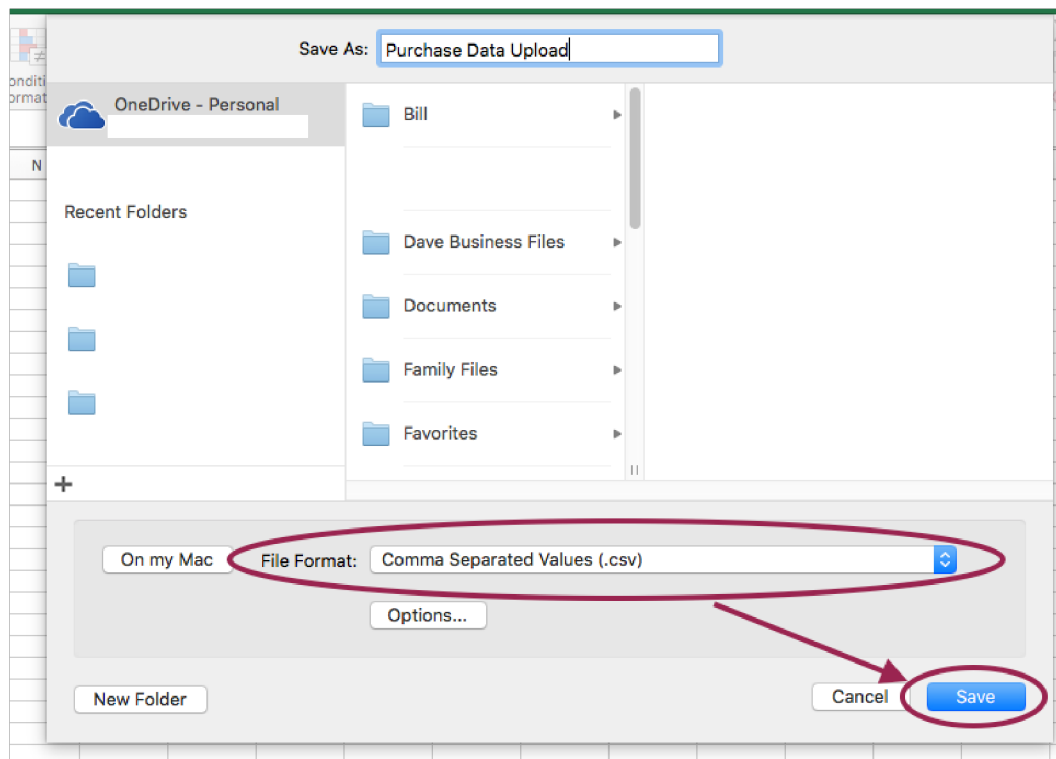
Once prompted by the download, we will open this report into Excel.



In order to convert a file to CSV format, you'll need to open the report in Excel and click the 'File' tab at the top left-hand side of the page.



Next, click the 'Save As...' option in the Excel Menu.



Choose the 'Comma Separated Values (.csv)' option in the File Format dropdown and save an accessible location on your computer, such as your desktop.

This may be listed as 'Comma Delimited (.csv)' on Windows.

You will go back to the iApotheca platform to 'Upload File'

iApotheca User

Inventory Counts

Start New Count

Title	Date	# ITEMS
Initial	Jan 26, 2022	1
Sample Count	Jan 13, 2022	0
Test	Jan 4, 2022	3

- Counts
- Purchase Records
- Dispensing Records
- Destruction Records
- Upload File**
- Help & Support
- Drug Management

Upload File

Choose File no file selected

Upload File

Here you will be able to 'Choose File' to browse your computer or you can drag and drop the file and 'Upload File'

If you experience any troubles with this guide, feel free to call 1 (800) 209-6052 or email support@iapothecca.com for assistance.