

McKesson Purchase History Reports

How to Download a Purchase Report from McKesson

In order to add McKesson purchase data to the Narcotics Reconciliation Module you are required to download a report from the McKesson platform– this can be accomplished by accessing the Narcotics and Controlled Substances Report.

To begin, ensure that you are logged into the McKesson platform with an account that has permission to access reports, and navigate to the Finance tab on the left-hand side of the page.

Upon clicking the Finance tab, you will see a drop-down list of account options- click on the Statistics option at the bottom of the list.

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Upon selecting this option, you will be given the option to select a report- upon choosing the Narcotics and Controlled Substances option at the bottom of the list, you are able to filter your results according to date range.

By Product By Vendor By Product Family Group - Top 100 By Product Family Group - Comparative	From (yyyy-mm-dd)	1 🗃 To 2022	2-01-10	
Sales Tax Generic Products Products by Therapeutic Class Narrotic and Controlled Substances			O View 🖲	xport to Ex Build Repo

Select the appropriate date range, then choose the 'Export to Excel' option and click 'Build Report'.

The report will usually go into the downloads, or you may be prompted to save the report.

Home / Statistics / Narcotic and Controlled Substance Orders Returns Finance Catalog	
Select a report By Product By Vendor By Product Family Group - Top 100 By Product Family Group - Comparative Sales Tax Generic Products Products by Therapeutic Class Narcotic and Controlled Substances	Calendar periods From 2021-10-01 To 2022-01-01 So View Export to Excerned Suid Report
report.xls 2.xls	Show all

You will go back to iApotheca and then 'Upload File', you can 'Choose File' to open your desktop to search for the report, or you will be able to drag and drop the report from your downloads.

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Once the report has been uploaded, you will see a confirmation screen.

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