Central Supply Inventory Count, Adjust & Transfer

Count

1. Confirm location (always Central Supply)
2. Enter quantity (items in bin - take note of unit of measure.) and press Enter
   If UM has been opened, consider it expended.
3. Scan in (or enter product number) for item being counted and press Enter
4. Repeat until inventory is complete. Click X to exit

Adjust

- Only taken prior to Inventory Go Live
- Taken prior to Inventory Go Live and as needed afterwards

5. Confirm location (always Central Supply)
6. Click on elipses and choose adjustment code. Orders taken prior to Inventory Go Live but not received entered as Initial
7. Enter quantity in Input field and press Enter
8. Scan in (or enter product number) in Input field and press Enter
9. Repeat until complete and click X to exit

Transfer

10. Confirm location
11. Enter quantity
12. Scan in (or enter product number) for item being counted
13. Click X to exit
With requisition form in front of you:
1. Click on Inventory icon
2. Click on Order button
3. Select order type from drop-down
4. Type in vendor name (select from displayed options). Not case sensitive. Check for options after first letter.
5. Enter PO# For P-cards, enter PC & today’s date (e.g., PC060714). For multiple POs on the same day, add 01, 02, etc. on the end (e.g., PC06071401).
6. Type in product code. “Ensure packaging code is entered at the end of the string (e.g., -CS). Click on the elipses if you need to search for a product code.
7. Enter quantity
8. In the Comment section, enter note as to whom the order is for. Additional information as needed.
9. Enter Need by date
10. Enter unit cost if different from display
11. Click on folder with green + to add product to order list. Continue until all orders on requisition form are entered. If warned that the amount is more or less than order limits, click on Ordering Info. You can exceed the guidelines for now but inform Julie any time data or limits are incorrect.
   • To modify order, make necessary changes and click on the folder with the blue check.
   • To add additional orders to same PO#, click on the light bulb and add new information
12. Click X to exit order window

To make a correction, go to the Pending Order tab, search, and double-click on order to alter. Highlight the item to change, make the change, and click on the folder with the blue check before exiting.
Inventory Ordering - Central Supply

Central Supply Staff:
1. Select Pending Internal Orders tab
2. Refine order location and type as required
3. Click Search button
4. Double-click on selected product order
5. Research item and enter additional product info in the Comment field.

Central Supply Manager:
6. Open Maintenance - Inventory - Products
7. Click on folder with the green plus
8. Enter product details
9. Click OK to exit

Central Supply Manager:
Repeat 1-4 above to re-enter Inventory Order window
10. Click on Vendor ellipses
11. Click on folder with the green plus
12. Complete vendor details
13. Click OK to exit
14. Enter new product code
15. Click on folder with the blue check to save changes
16. Click X to exit
Inventory Receiving

1. Click on Receive button
2. Enter PO# (case sensitive). The product displays if the code is found. Make sure the product matches your invoice. Notice that product in the bottom table has not been filled or received.
3. Highlight product on displayed list if multiple items display
4. Enter quantity received and press enter
5. Item will display as having been filled and received
6. Click X to exit order window

Process backordered items received in a different shipment the same way.
Inventory Repacking

1. Click on Received tab
2. Set Date Range to today
3. Click on Search
4. Right mouse click on item to repack
5. Choose Repackage Product

Repackaging needs to be completed and entered in Inventory on the same day the item is entered as received.

6. Copy product number from Product Info - Product field
7. Paste product number in Repackaged Product - Product field
8. Change product number to reflect new product size (e.g., -CS to -BX)
9. Copy the number from the Total Items box to the Quantity box to auto generate then new cost per unit.
Pick and Fill

Printing a Pick List

1. Click on *Pending Internal Order* tab
2. Data From: Set to 7/1/14
3. Ordered By: Select clinic from drop-down
4. Press Search
5. Select an order to fill. Select multiple orders placed at the same time by holding down the shift key
6. Click on Pick List. This will send the pick list to the designated printer

The pick list accompanies the delivery. The receiver checks the pick list against received items. If correct, discard the pick list. If incorrect, document the discrepancy, both deliverer and receiver sign the pick list, and take the pick list to Julie Paist.

Fill

7. Click on Fill
8. Highlight correct order
9. Click *OK*, opening *Order Filling* window
10. Highlight order to fill and
11. Enter the quantity picked and press enter. Notice the quantity moves from *To Fill* to *Filled*
12. Click X to close window when done

If you exit with some orders not filled, a window will display asking if you’d like to backorder missing items. Click Yes.