## **Adding Inventory**

- 1. From the **Home** screen, go to **Operations**  $\rightarrow$ Inventory -> Search Product Inventory. The Search Product Inventory screen displays.
- 2. Click Add New Item.

							Search	h Product Inventory	S FRAN	K RIZZO
Home Family Services Sch	neduling <u>V</u> endor <u>Operation</u>	is F <u>i</u> nance <u>A</u> dministrat	tion <u>H</u> el	lp					1	Logout 👸
• Search Inventory Produ	uct Inventory									0
Search Location	Inventory Product ID Item ID	Inventory Product Name Item Name	State I Manufa	nvent	ory Number r Number	Expiration Dat	te Itus	Inventory Type	Search Ty Serialize Non-Ser Only Lov	<b>pe</b> d ialized w Inventory
Toventory Search Resu	lts (Products)	Total Items		To To	ventory Se	earch Results (	Items)	Searc	h Clea	ar Criteria
Inventory Product ID	Inventory Product Name	Total Reorder 1 on Order Point of	fotal on Hand		Item ID		Item Name	State Inventor Number	Y Status	Quantity
Esterted Bow Details					alactad Bou	- Dotaile				
Order Transfer					Issue	Reserve	Dispose		Re	turn Items
Add To Results By Scan								Add Ne	w Item	Cancel
Online Version 0.50.196.14605	60026	CL2 - Shenandoah	Valley M	edical	System			ТАВ 🤤	100%	

- 3. The Add New Inventory Item screen displays.
- 4. Click **Location** button ( ) to search for and select your current clinic location if needed.
- 5. Click Choose Inventory Product button ( to search for and select a product.

							Add New Inve	entory Item 🎽 FRANK RE
е	Eamily Services	<u>S</u> cheduling	Vendor	<u>Operations</u>	Finance	Administration	n <u>H</u> elp	Log
dd	New Inventory	Item						
	Location		>					
	State:- Crossroad	ds WIC						
2	Choose Invento Nothing Selecter	ory Product d	>					
_	2							
Se	rialized Item							
Se	elect Item Entry M	ethod						
0	Single Item 🔘 Mul	tiple Item						
It	em ID		entory Iten Hand	n Status	Expiration	Date		
		UII	iunu		0	11 <sup>10</sup>		
It	em Name 🚖	Mar	ufacturer I	lumber 🚖	Date Addee	To Inventory	State Inventory Number	r 🚖
C					1/31/2013			Scan Barcode Print Barcode
	Out for Maintenance	e						
-								
								Save Can

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- 6. The Inventory Product Search screen displays.
- 7. Select an **Inventory Type** from the options in the dropdown box.
- 8. Click Search.

Inventory Product Search			×
Product ID	Inventory Product Selection		Total Items: 0
Product Name	Product ID Serialized Product Name	Inventory Type	Model
Inventory Type			
NCH Inventory			
MCH Inventory Only			
Search Clear Criteria			
	<u> </u>		
			Cancel

- 9. The **Inventory Product Selection** grid refreshes and displays the result of the search.
- 10. Double-click the desired product listed in the grid.

entory Product Search				
duct ID Inventor	y Product S	election		Total Items: 3
Product ID	Serialized	Product Name	Inventory Type	Model
duct Name 9		Single Deluxe Electric Breast Pump	Single-use Electric Breast Pumps	Model 016PNC01
4		Single Electric Pump	Single-use Electric Breast Pumps	Model 6100050
entony Type		Swing Breast Pump and Kit	Single-use Electric Breast Pumps	Model 67050
entory Type				
gle-use Electric Breast F 💌				
H Inventory				
MCH Inventory Only				
Search Clear Criteria				Garred

- 11. The **Add New Inventory Item** screen refreshes and displays the selected product.
- 12. Complete additional information for the product in the item details section. The item details section on the Add New Inventory Item screen displays differently for **non-serialized** and **serialized** items.

For a non-serialized item, the **Non Serialized Item** group box contains the item details.

- Update the **Item Name** if necessary.
- Entering an **Expiration Date** is not required.
- Enter the **Quantity**.
- Enter or update the serial number in the Manufacturer Number field if necessary.

For a serialized item, the **Serialized Item** group box contains the item details.

- Select either the Single Item or Multiple Item radio button under Select Item Entry Method as necessary.
- Entering an **Expiration Date** is not required.
- Update the Item Name if necessary.
- Enter the serial number in the **Manufacturer Number** field.
- Enter the Fixed Asset Tag Number in the **State Inventory Number** field.

Add New Inventory Item			â
CL2 - Shenandoah Valley Med	dical System		
Product ID Product N 9 Single Delu	<b>ame</b> uxe Electric Breast Pump	Inventory Type Single-use Electric Breast Pumps	
Non Serialized Item			
Item Name 🚖	Expiration Date	Date Added To Inventory	
Single Deluxe Electric Breast Pump		1/31/2013	
Quantity 🚖	Manufacturer Number		

Location				
CL2 - Shenandoał	h Valley Medical System			
Product ID 8	Product Name Lactina Plus Breast Pump	Inventory Type Multi-use Breast Pumps		
erialized Item				
Select Item Entry Me	ethod			
🖲 Single Item 🔵 Multi	iple Item			
ltem ID	Inventory Item St On Hand	atus Expiration Date		
item ID	Inventory Item St On Hand	atus Expiration Date		
item ID item Name 🚖	Inventory Item St On Hand Manufacturer Num	atus Expiration Date	ry 🛛 State Inventory Number 🚖	

13. Click Save. The Search Product Inventory screen refreshes and displays a status message indicating success.

## **Searching for Existing Inventory**

- From the Home screen, go to Operations → Inventory → Search Product Inventory. The Search Product Inventory screen displays.
- 2. Under **Search Location**, select your agency or clinic location.
- 3. Complete one or more of the following:
- Enter an Inventory Product Name.
- Enter a **State Inventory Number**.
- Select an Inventory Type.
- Enter an Item ID.
- Enter an Item Name.
- Enter a Manufacturer Number.
- 4. Click Search.

			Search Pro	duct Inventory	FRANK RIZZO
Home Family Services Scheduling Vendor Operations	Finance Administration Help				Logout 😚
Search Inventory Product Inventory					0
- Search Location Inventory Product ID In All State Agency Clinic	ventory Product Name State In em Name Manufac	ventory Number Expiration	n Date Inve	entory Type	earch Type ] Serialized ] Non-Serialized ] Only Low Inventory Clear Criteria
Inventory Search Results (Products)	Total Items: 0 🕢	• Inventory Search Resu	lts (Items)		Total Items: 0
Inventory Product ID Inventory Product Name	Total Reorder Total on Order Point on Hand	Item ID	Item Name	State Inventory Number	Status Quantity
E Selected Row Details		Selected Row Details     Issue Reserve	Dispose		Return Items
Add To Benetic Bu Care		LUGGC RESERVE		Codd News	Them Count
Online Version 0.50.196.14605 60026	CL2 - Shenandoah Valley Med	dical System 🔡			

5.	The Inventory Search Results (Products) and
	Inventory Search Results (Items) grids refresh
	and display the results of the search.

• Inv	entory Search Resul	ts (Products)		Total Ite	ms: 5 🕜	• Inv	ento	ry Searc	h Results (Items)		Total I	Items: 48 🤇	2
	Inventory Product ID	Inventory Product Name	Total on Order	Reorder Point	Total on Hand			Item ID	Item Name	State Inventory Number	Status	Quantity	
	8	Lactina Plus Breast Pump	14	40	30		0	57	Lactina Plus Breast Pump	100	Issued	1	
	11	EBT Card	0	40	126		0	58	Lactina Plus Breast Pump	101	Issued	1	
	12	ID Card	40	40	-2		0	59	Lactina Plus Breast Pump	102	Issued	1	
	24	Farmers Market Booklet	28	40	25		0	60	Lactina Plus Breast Pump	103	Issued (Reserved)	1	
	40	Demo SK Product	0	50	20		0	61	Lactina Plus Breast Pump	104	Issued (Reserved)	1	
							0	62	Lactina Plus Breast Pump	105	Issued (Reserved)	1	
							0	63	Lactina Plus Breast Pump	106	Issued	1	
							0	64	Lactina Plus Breast Pump	107	Issued	1	
							0	67	Lactina Plus Breast Pump	110	Maintenance	1	
							0	68	Lactina Plus Breast Pump	111	Issued	1	
							0	69	Lactina Plus Breast Pump	112	On Hand	1	•
▶ Sel	ected Row Details					▶ Sele	ecter	Row De	tails				
0	rder Transfer					I	isue	Re	serve Dispose			Return Iten	15

## **Disposing of Inventory**

- 1. On the **Search Product Inventory** screen, perform a search if necessary.
- Double-click a product listed within the Inventory Search Results (Products) grid. The items associated to the selected product display in the Inventory Search Results (Items) grid.

<b>▼Sea</b>	rch Inventory Produ	ct Inventory												0
Sea	arch Location ———	Inventory Pr	oduct ID	Inve	ntory Pro	duct Na	me	State	e Invent	ory Number	Expirat	tion Date	Inven	tory Type
© 06	All State Agency Clinic 5-01 - New Hanove	Item ID		Item	Name		]	Man	ufacture	r Number	Invent	ory Status		
▼Inv	entory Search Resul	ts (Products)		Total It	ems: <b>43</b>	0	Inve	entor	ry Sear	ch Results	(Items)	Search	Total Ite	ms: 1
	Inventory Product ID	Inventory Proc	Total on Order	Reorder Point	Total on Hand				Item IC	Item N	ame	State Inventory Number	Status	Quantity
	64	Breast Shell System	0	0	3			0	40	Disposable P	ads		On Hand	3
	65	Disposable Bra Pads	0	0	3									
	66	Disposable Bra Pads-Sample 4 pack	0	0	3									
	67	Cotton- Washable Pads	0	0	3									
	68	Disposable Pads	0	0	3	R								
Sele	ected Row Details						Sele	cted	Row De	tails		<u></u>	_	
0	Transfer						155	ue	R	serve	Dispose		Re	turn Items

- 3. Select the check box associated to an item within the **Inventory Search Results (Items)** grid.
- 4. Click Dispose.

<b>TINV</b>	ento	ry Searc	h Results (Items)		Total Ite	ms: 1 🕜
		Item ID	Item Name	State Inventory Number	Status	Quantity
	0	40	Disposable Pads		On Hand	3
Sele	cted	Row Det	ails			
Is	sue	Res	Berve Dispose	]	Re	turn Items

- 5. The **Dispose Inventory Items** screen displays
- 6. Update the quantity in the **Quantity to Dispose** column of the **Inventory Items to Reserve** grid as necessary.
- 7. Enter or select the **Disposition Date**.
- 8. Select the **Disposition Reason**.
- 9. Enter **Comments** as necessary.
- 10. Click Dispose.

isbo	se Inve	ntory Item	IS				
In	ventory	Items to D	Dispose			otal Items: 1	Disposition Date \star Disposition Reason 🖈
	Item ID	Item Name	State Inventory Number	Status	Quantity	Quantity to Dispose	7/9/2013 Damaged
×	40	Disposa Pads		On Hand	3	2	Comments
							× crossroads4 New 7/9/2013. 51 P
Se	lected Ro	w Details					Child opened by accident

11. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity**.

<ul> <li>Inventory Search Results (Products).</li> </ul>			Total Items: 43 🕢			Inventory Search Results (Items)			Total Items: 1 🕜				
	Inventory Product ID	Inventory Proc	Total on Order	Reorder Point	Total on Hand	Π			Item ID	Item Name	State Inventory Number	Status	Quantity
	64	Breast Shell System	0	0	3			0	40	Disposable Pads		On Hand	1
	65	Disposable Bra Pads	0	0	3								
	66	Disposable Bra Pads-Sample 4 pack	0	0	3								
	67	Cotton- Washable Pads	0	0	3								
	68	Disposable Pads	0	0	1								
▶ Sele	Selected Row Details					▶Selected Row Details							
0	Order Transfer						sue	Res	serve Dispose	]	Re	turn Items	

## **Searching for Formula Items Issued to Participants**

- From the Home screen, go to Operations → Inventory → Issued Formula Items. The Formula Items Issued to Participants screen displays.
- 2. Under **Search Location**, select your agency or clinic location.
- 3. Complete information in one or more of the following to filter the list of results displayed in the **Issued Formula Items** grid:
- Start Date
- End Date
- Family WIC ID
- 4. Click Search to perform a search.
- 5. The **Issued Formula Items** grid refreshes and displays records matching the search criteria specified under **Formula Items Issued to Participants**. The Issued Formula Items grid displays the Food Instrument number, Item, Issue Date, participant name and quantity for each formula item issued that matches the search criteria.

Note: You may click on a column header to sort the items in the grid. You may click and hold on a column header, then drag and drop columns of information to reorganize the order of the columns in the grid.

			Formula Items Issued to Participants 🔒	oss rossroads					
Home Family Services Scheduling	Vendor Operations Finance Administ	stration Help		Logout 😚					
*Formula Items Issued to Participants									
Search Location Star All State Agency Olinic 065-01 - New Hanove	t Date End Date 2014 🗊 1/31/2014 🗭	Family WIC ID		Search					
vIssued Formula Items Total Items: 0 🕢									
Food Instrument	Item	Issue Date	Issued To	Quantity					

			Fo	rmula Items Issued to Participants 🛔 Cr iss rossroad
e Family Services	s Scheduling Vendor Oper	rations Finance Adminis	stration Help	Logout
Formula Items Iss	ued to Participants			
Search Location - All State Agency Clinic SKIP065 02 - Wrights	Start Date 8/1/2013	End Date	Family WIC ID	Search
*Issued Formula 1	Items			Total Items: 16 🦿
Food Instrument		Issued To	Item	Issue Date A Quantit
70822	Cameron Diaz		Gerber Good Start Soy Powder 12.9 oz.	1/8/2014 11:01:24 AM 2
56099	Judy Ball		Gerber Good Start Gentle Powder 12.7 oz.	10/18/2013 9:46:12 AM 9
6286	Sunday Weeks		Similac PM 60/40 Powder 14.1 oz.	10/21/2013 2:39:35 PM 4
56467	Geraldine Feeney		Gerber Good Start Gentle Powder 12.7 oz.	10/23/2013 5:02:16 PM 7
57160	red paper		Gerber Good Start Gentle Powder 12.7 oz.	11/5/2013 3:48:58 PM 9
9299	Grace Gardenia		Gerber Good Start Gentle Powder 12.7 oz.	12/2/2013 2:37:36 PM 4
54203	Maria Mayflower		Gerber Good Start Gentle Powder 12.7 oz.	8/12/2013 10:40:27 AM 9
54204	Cadyn Clearwater		Gerber Good Start Gentle Powder 12.7 oz.	8/12/2013 10:55:43 AM 5
54441	April Bellows		Gerber Good Start Gentle Powder 12.7 oz.	8/13/2013 3:06:27 PM 1
54515	yvonne Currin		Gerber Good Start Gentle Powder 12.7 oz.	8/14/2013 10:42:24 AM 4
54515 54489	yvonne Currin Susan Currin		Gerber Good Start Gentle Powder 12.7 oz. Gerber Good Start Gentle Powder 12.7 oz.	8/14/2013 10:42:24 AM 4 8/14/2013 9:32:14 AM 4