IDEXX Cornerstone*
Initiating Inventory Management

8.3 *Participant Workbook*

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IDEXX Computer Systems

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Initiating Inventory Management

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Introduction

Introduction to Initiating Inventory Management

Course Description

During this course, inventory managers from practices that are just starting inventory management for the IDEXX Cornerstone* Practice Management System will learn basic inventory management capabilities, be introduced to a decisions and setup checklist, and then learn how to complete basic purchase, receipt, and other important inventory transactions in their real practice data files or the training files.

Prerequisites

- The current version of the Cornerstone* software installed at the practice.
- Decision to use Cornerstone single location inventory.
- Access to the inventory feature, which means inventory security has been turned on for inventory management staff.
- Invoice item setup knowledge and experience, including how to maintain classifications and subclassifications.
- Knowledge of basic inventory management processes outside of Cornerstone, such as efficient physical counts, properly receiving inventory, and communication among inventory management staff.
- If your practice is using IDEXX SmartOrder* electronic inventory ordering with MWI® Veterinary Supply integration, you must establish an account with MWI at mwivet.com, set up electronic inventory ordering in Cornerstone, and have a consistent, high-speed Internet connection. For more information about setting up IDEXX SmartOrder, see “IDEXX SmartOrder* Inventory Solution” on page 63.

Getting Started

Throughout this training, you may be working in your own practice’s database.

As you participate in this course, it is most effective if you are working at a Cornerstone workstation so that you can follow along in the participant workbook and complete the exercises.

Training Content

Content of the course includes:

- Getting Started Phases and Setup
- Purchase
- Receive
- Deplete/Adjust/Move
- IDEXX SmartOrder* Inventory Solution

These icons are used throughout the training to provide additional information:

Important Information: Provides critical information about the topic or procedure. Read this information carefully.

Note: Provides additional information about the topic or procedure.

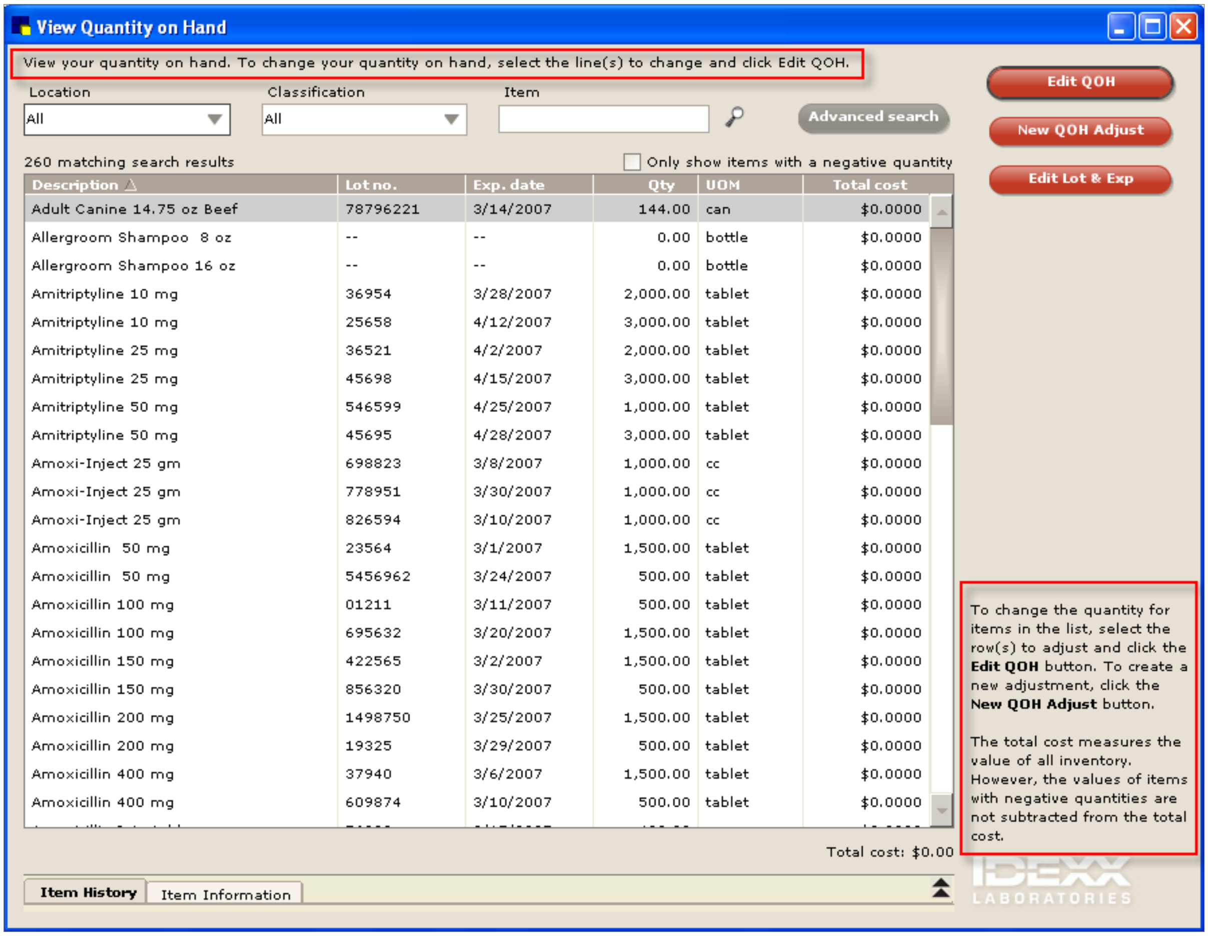
Tip: Provides helpful information about the topic or procedure.

When you see this image placed below a lesson name, it indicates that video snippets are available online at idexxlearningcenter.com for topics related to this lesson.

Getting Help

On Window Help/Information

Instructional information can be found under the window title and in the lower right-hand corner of many of the inventory windows.



Cornerstone Reference Resources

There are three reference resources for you to access if you have questions while using Cornerstone. Cornerstone Help can be accessed within the Cornerstone software. The *Cornerstone Administrator's Manual* and *Cornerstone User's Manual* are available from icons located on your desktop or from the Start menu. The IDEXX Cornerstone Customer Support Center is a website designed to provide you with general information for questions you may have, including training materials, and it is accessible through Cornerstone or any Internet browser.

Using Cornerstone Help

You can access Cornerstone Help in three ways:

- Press F1 for content-specific help.
- Click the **Help** button on the toolbar.
- Select **Help** on the menu bar and select either **Contents** or **Search For Help On**.

You can also view Help text that displays on the left side of the status bar.

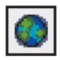
Using Cornerstone Administrator's Manual and Cornerstone User's Manual

The *Cornerstone Administrator's Manual* and *Cornerstone User's Manual* are accessed through the Cornerstone Program menu. Use the manuals to supplement your learning, gain additional information on a topic, or help answer questions you have in the future.

To access either manual, select **Start > All Programs > Cornerstone > Manuals**.

Online Cornerstone Customer Support Center

You can access the support center 24 hours a day, 7 days a week, 365 days a year:

- Select **Cornerstone > Help > Support Center**.
- Click the **Support Center** button  on the toolbar.
- Type cornerstonehelp.com in any Internet browser

Getting Started: Phases and Setup

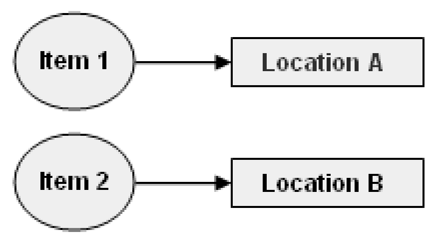
Phase 1: Understand Basic Workflow and Unique Capabilities

Cornerstone inventory management has the following unique capabilities that allow you to reach your desired level of total inventory cost, profit margins, turnover, and accurate quantities:

- Follows a basic inventory management work flow of purchase, receive, and deplete.
- Single location inventory tracking whereby one invoice item is tracked at one location (i.e., Invoice Item A at Location 1, Invoice Item B at Location 2) or multi-location inventory tracking whereby one invoice item is tracked at more than one location (i.e., Invoice Item A at Location 1 and Invoice Item A at Location 2).
- Ability to order by Want List and/or Suggest List.
- Key reports, such as the Cost of Goods Sold Report.

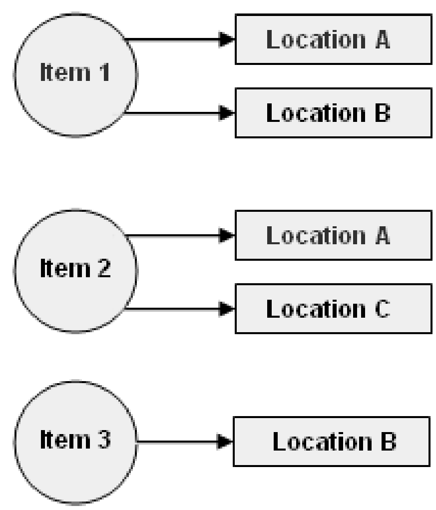
Single Location Per Invoice Item

Single Location



Multi-Location Per Invoice Item

Multiple Locations



Phase 2: Decisions and Setup Before Invoice Item Information

View a snippet online demonstration

<table>
<tr><th></th><th>Checklist Item</th><th>Explanation</th></tr>
<tr><td>☐</td><td>1. Pick a beginning category (Classification or Subclassification)</td><td>For a manageable project, select one classification or subclassification to begin tracking inventory quantities on hand. A recommended classification is food. It is straightforward for a beginner to set up and count.</td></tr>
<tr><td>☐</td><td>2. Set initial inventory security</td><td>Turn on security for staff who are responsible for inventory management setup. Use the M/O column found in “Inventory Security Settings” in the appendix.</td></tr>
<tr><td>☐</td><td>3. Review and move items within category</td><td>Evaluate/move invoice items within these classes/subclasses, if needed.

Print the Invoice Item Setup Report for this category: Reports > Invoice Item > Invoice Item Setup Report. Select the range of Class ID or Subclass ID.

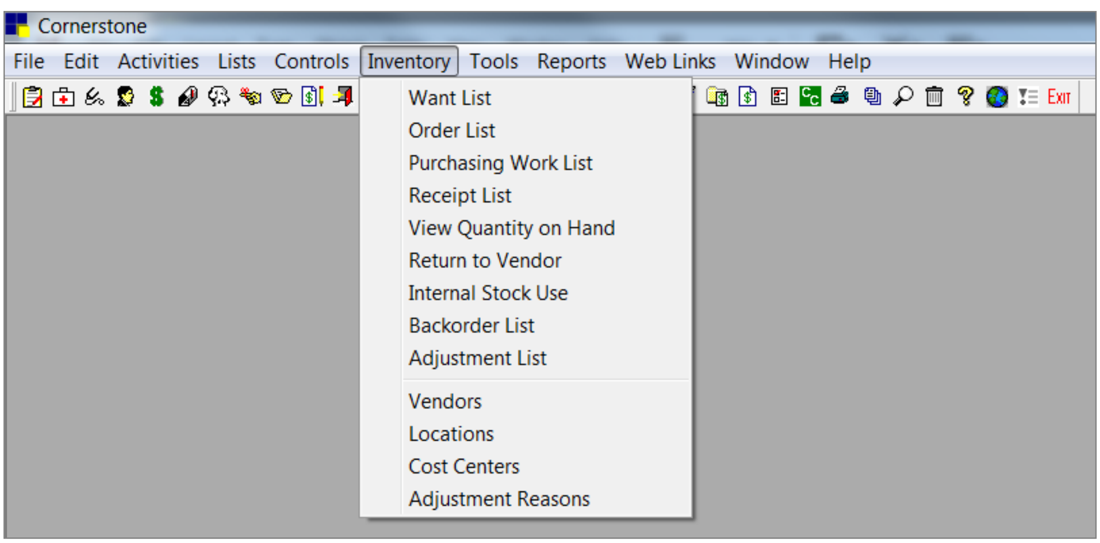
Some of the items may need to be changed from service to inventory. Some items might not belong here and you’ll need to move to another classification or subclassification.</td></tr>
<tr><td>☐</td><td>4. Review and set up units of measure for category</td><td>Identify the normal buy and minimum sell quantities for chosen category.

<table><tr><th>Item Examples</th><th>Buy</th><th>Minimum Sell</th></tr><tr><td>Injectables</td><td>Vial</td><td>CC</td></tr><tr><td>Heartworm</td><td>Box</td><td>Package</td></tr><tr><td>Heartworm</td><td>Box</td><td>1 Dose</td></tr></table>
Review and set up units of measure under Controls > Units of Measure.</td></tr>
<tr><td>☐</td><td>5. Set up vendors for category</td><td>Collect vendors and information for this category: Vendor name, address, website, contact name, contact phone #, contact email address. Set up under Inventory > Vendors. See “IDEXX SmartOrder* Inventory Solution” on page 63 if your practice is using that feature. Additional setup is required.</td></tr>
<tr><td>☐</td><td>6. Set up locations for category</td><td>Set up the locations where this category is kept (Inventory > Locations). You can print various reports by location, such as the Inventory Counts Report, and provide that location report to individual staff members for physical counts.</td></tr>
</table>

	Checklist Item	Explanation
☐	7. **Make lot and expiration date tracking decision** for chosen category	Make a management decision and choose one of the four tracking options: ☐ Track neither lot nor expiration date but only quantities ☐ Track lot number along with quantities ☐ Track expiration date along with quantities ☐ Track lot number and expiration date, along with quantities Use this decision criteria: • Staff will need to enter or select the level of inventory detail you set at any of the consumption windows: (Patient Visit List, Whiteboard, Prescription, Rabies, or Invoice). • Cornerstone allows staff to enter a lot and expiration date on the fly at consumption (Patient Visit List, Whiteboard, Prescription, Rabies, or Invoice), which means they could enter an invalid option and it would need to be corrected. • A manually entered lot/expiration date will require a manual correction by inventory staff, even if the manually entered info is correct or the result will create a negative QOH for those items. You can print the Invoice Item Sales Information for a specific lot number to see a list of clients that purchased an item with a given lot number. tip Use the Inventory Audit Report to see all lot numbers on items invoiced to patients.

Access Inventory Management

Access Inventory from the IDEXX Cornerstone* Practice Management System menu bar.

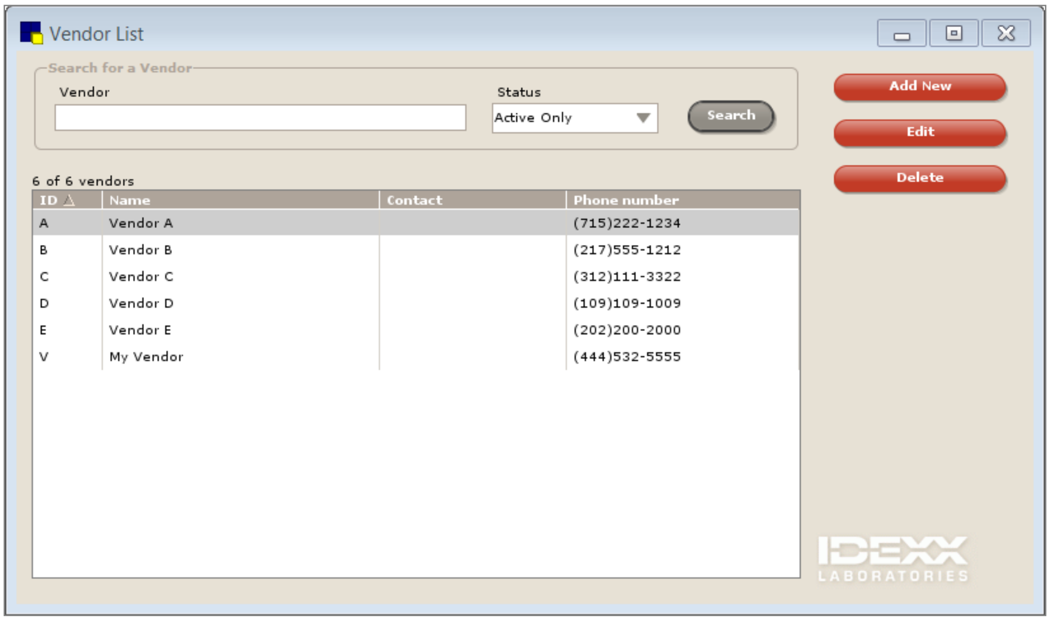


Set Up Vendors, Locations, Cost Centers, and Units of Measure

Vendor List Overview

View a snippet online demonstration

To open the Vendor List window, select **Inventory > Vendors**. The Vendor List displays active vendors used by the practice to place orders, receive inventory, and return inventory. From the Vendor List window, add new vendors, edit existing vendors, and delete unused vendors.



The **Search for a Vendor** area includes the following fields:

- **Vendor** box: Type the beginning letters or the full name of a vendor.

  tip The **Vendor** box is not case sensitive. Use the % sign followed by a combination of letters to find any vendor whose name contains the combination. Searches cannot be performed on vendor IDs.

- **Status** list: Select the status of the vendor. Choices include **All**, **Active Only**, or **Inactive Only**.

Adding a New Vendor

View a snippet online demonstration

The Vendor List window displays active vendors set up by the practice.

To add or edit vendor information:

1. On the menu, select **Inventory > Vendors**.
2. Click **Add New**.

   To modify an existing vendor, select the vendor and click **Edit**, or double-click the vendor in the list.

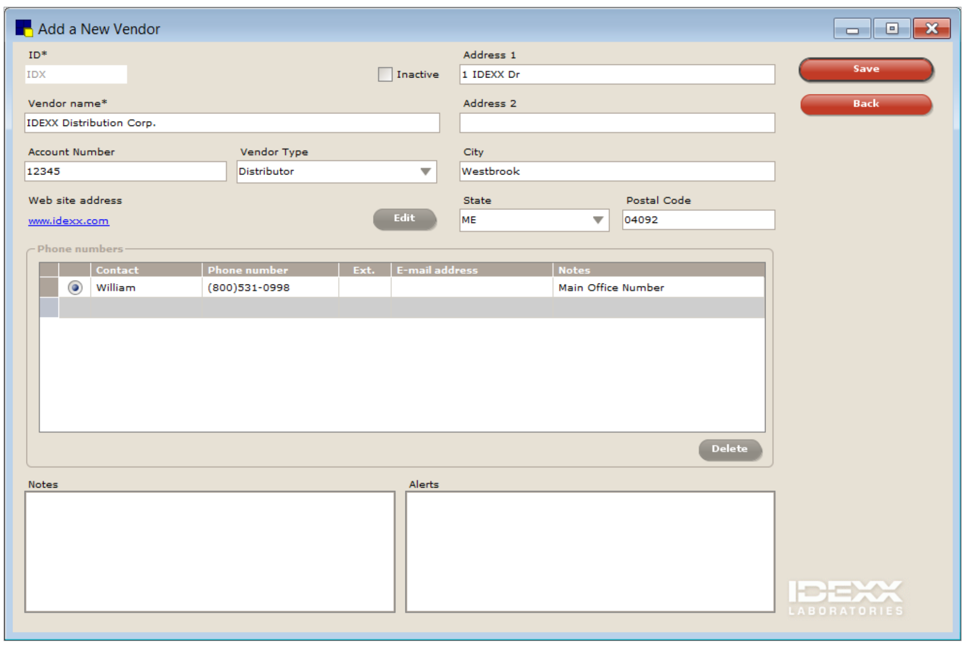
   Fields marked with an asterisk (*) are required.

3. In the **Vendor** name box, type the vendor's name.

4. In the **Account Number** box, type the account number.
5. From the **Vendor Type** list, select the type of vendor.
6. In the **Web site address** box, type the URL for the vendor's website. Click **Edit** to make any changes to a website address.
7. In the address boxes, type the vendor's address.
8. In the **Phone numbers** area, enter the vendor's phone number information.
9. Click **Save**.
10. Close the Vendor List window.

When looking for a specific vendor, enter information in one or more of the criteria fields provided and click **Search**. Vendors that match the criteria display on the Vendor List.

Vendors that have been used previously may be inactivated but not deleted.



Adding a Location

View a snippet online demonstration

More than one location can be set up by the practice for tracking inventory. Each inventory item can be assigned to one location. Examples of locations include room names, room numbers, shelf numbers, reception areas, stockrooms, trucks, refrigerators, lock boxes, kennels, and controlled substance cabinets.

- At least one location is required if your practice wants to track the quantity on hand of inventory items.
- If you have Central Storage as a location and if you intend to have only one location for all inventoried items, skip this lesson.
- You can receive only inventory items (regardless of QOH tracking status) into inventory (not service, group, dispensing, or pick items).

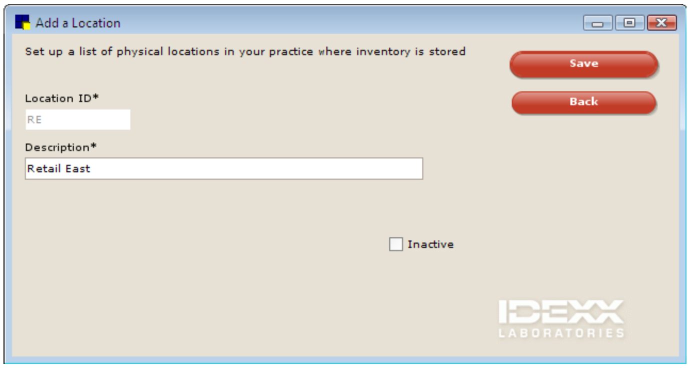
Locations can be deleted if not used or inactivated if no longer used and items are moved out of the location.

To add or edit location information:

1. On the menu, select **Inventory > Locations**.
2. Click **Add New**.

   To modify an existing location, select the location and click **Edit**, or double-click the location in the list.

3. In the **Location ID** box, type a unique ID for the location.
4. In the **Description** box, type the name of location.
5. Click **Save**.
6. Close the Locations List window.



Adding a Cost Center

tip View a snippet online demonstration

Inventory items that are consumed by the practice but not invoiced to the clients can be depleted from inventory using the Internal Stock Use window. A cost center is required in order to track and report the cost of the items used internally. Some examples of cost centers include expired products, laboratory supplies, and treatment supplies.

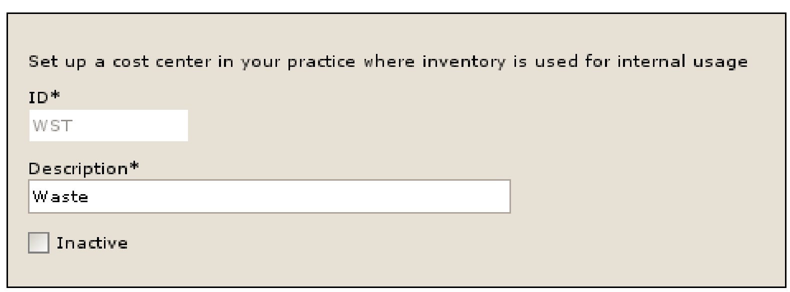
Use this method rather than invoicing a practice account, which negatively impacts your average invoice metrics.

To add or edit a cost center:

1. On the menu, select **Inventory > Cost Centers.**
2. Click **Add New**.

   To modify an existing cost center, select the cost center and click **Edit**, or double-click the cost center in the list.

3. In the **ID** box, type an ID.
4. In the **Description** box, type a description.
5. Click **Save**.
6. Close the Cost Centers List window.



Adding an Adjustment Reason

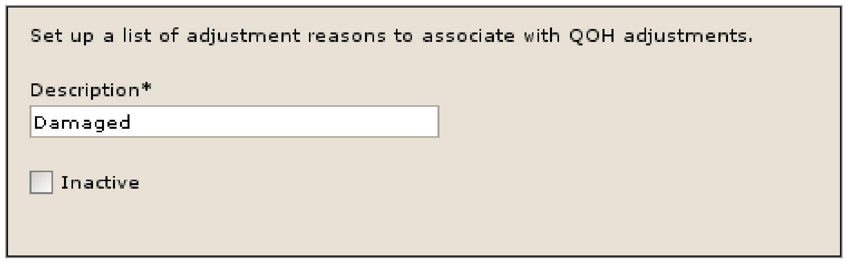
View a snippet online demonstration

Adjustment reasons are used to explain why a quantity on hand , expiration date, or lot number adjustment was performed for an inventory item. This information can be tracked using the Inventory—Adjustment Report.

To add or edit an adjustment reason:

1. On the menu, select **Inventory > Adjustment Reasons**.
2. Click **Add New**.

   To modify an existing adjustment reason, select the adjustment reason and click **Edit**, or double-click the adjustment reason in the list.



3. In the **Description** box, type a description.
4. Click **Save**.
5. Close the Adjustment Reasons List window.

Creating or Modifying Units of Measure

Units of measure (UOM) are used to set the selling and buying units for inventory items. Units of measure appear on client invoices, estimates, and various item, sales, and inventory reports.

To add or edit a unit of measure:

1. On the menu, select **Controls > Units of Measure**.
2. Click **New**.

   To modify an existing unit of measure, select the unit of measure and click **Update**, or double-click the unit of measure in the list.

3. In the **Description** box, type a description.
4. Click **OK**.
5. Close the Invoice Item Units of Measure window.

   Units of measure that are associated with an invoice item cannot be deleted.

Phase 3: Invoice Item Information Changes—Mass and Single Changes

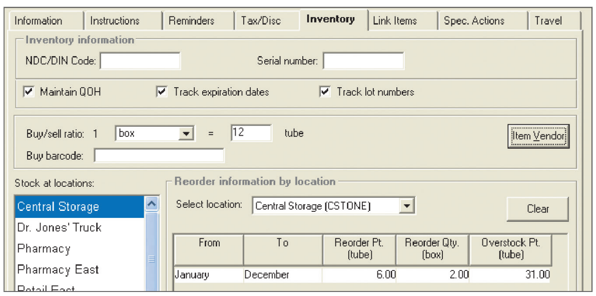
Single Changes—Maintain QOH

View a snippet online demonstration

To update inventory information for an invoice item:

1. On the menu, select **Lists > Invoice Item**.
2. Select an item and click **Update**, or double-click the item in the list.
3. On the **Info** tab, in the **Type** area, confirm the (sell) unit of measure. Confirm the information in the **Classification** and **Pricing** areas.

   tip Best practice is to use the auto calculate price feature with the markup percentage or the margin dollar amount set to update client prices when receiving inventory at a higher cost.
4. Click the **Inventory** tab.



5. Complete the following fields, if applicable:
   - **NDC/DIN Code**—Enter the NDC (National Drug Code) or DIN (Drug Identification Number).
   - **Serial number**—Enter the serial number for this item.
   - **Maintain QOH**—To maintain quantity on hand for this item, select the **Maintain QOH** check box. If your practice is using Cornerstone* inventory, you may find it useful to maintain quantity on hand (QOH) for various items.

     When the **Maintain QOH** check box is selected, other fields on this tab become active:

     tip When turning on expiration date or lot number tracking for first time, and existing inventory is already listed, it is advisable to immediately update the current QOH with expiration date and lot number information. (Update from the View Quantity on Hand window.)
   - **Track expiration date**—Select the check box if you want to track expiration dates.

     Expiration dates can be tracked only if the QOH is being maintained for this item.
   - **Track lot numbers**—If you want to track lot numbers select the check boxes for **Track lot numbers**.

     Lot numbers can only be tracked if the QOH is being maintained for this item.
   - **Buy/sell ratio**—Select the buy/sell ratio from the list. If your purchase and selling unit of measures are different, select the buy UOM and select the number of sell UOM included in each buy UOM; i.e., I box = 12 tubes.

     The sell UOM is set up on the **Information** tab. In the **Reorder information by location** area, the UOM in the **Reorder Qty.** column will update to reflect the buy UOM. The UOMs in the **Reorder Pt.** and **Overstock Pt.** columns display the sell UOM.

     tip If items are bought in various quantities (e.g., if an item is purchased in a bottle of 250 or 500 tablets, set the buy/sell ratio to 1 tablet = 1 tablet).

- **Buy barcode**—You can enter a buy barcode if the buy and sell numbers for the buy/sell ratio are different. If the numbers are the same (e.g., 1 box = 1 box; 1 tube = 1 dose) a buy barcode cannot be listed. Barcodes are optional.
- **Stock at location**—Select the location where you will stock this item.

  Locations are unique to each practice and are set up at **Inventory > Locations.**

  The number in the Overstock Pt. column must be at least 1 greater than the number of vials in the **Reorder Pt.** column, plus the number of vials ordered in the **Reorder Qty.** column.

  tip
  - To determine the minimum overstock point value, add the reorder point plus the reorder quantity. Be sure to convert the reorder quantity to individual units when adding. For example, if the reorder point is 3 cans, and the reorder quantity is 1 case (24 cans), then the minimum overstock point would be 28 (3 + 24 + 1).
  - To establish seasonal reorder points, click the month in the To column and select a different month. Cornerstone will automatically complete the next line for From column with the month following the one selected in the To column.
- **Item Vendor** button—Select the **Item Vendor** button to enter information about the vendors for this item on the Item Vendor Information window, and then click **OK** to save the information and close the window.

  If your practice uses IDEXX SmartOrder* electronic inventory ordering, you must ensure that invoice items are associated with the vendor MWI® Veterinary Supply. See “Adding Vendor Item IDs for Matching Inventory Items in Cornerstone” on page 66.

6. On the **Link Items** tab, list any QOH tracking inventory items and the appropriate quantities that will be depleted from inventory as a result of the sale of this item.
7. On the **Travel** tab, select any travel sheets that this item should be listed on.
8. On the **Special Actions** tab, select an applicable action, such as **Prescription Label** or **Print Document**.
9. When the information regarding the setup of the inventory item is complete, click **OK** to save.

Single Changes—Special Buy/Sell Scenarios

View a snippet online demonstration

There are times when you may need to purchase different quantities of a product or want to sell the product in varying amounts. You will need to decide how to set them up for inventory.

Example #1: Flea/tick or heartworm prevention

These products can be set up in two ways. The optimal method to set up this type of item is to sell it per dose. This will ensure the staff always enters the number of doses the client is purchasing so correct inventory counts are maintained.

Item	Buy/Sell Ration
Heartgard®	1 carton = 60 doses
Heartgard	1 carton = 10 packages

If the buy/sell ratio is set as 1 carton = 60 doses, you can still sell the doses with quantity price breaks.

Quantity	Amount	Markup %
Base	14.35	.00
6.00	11.60	.00
12.00	10.80	.00
.00	.00	.00

Example #2: Tablets that come in different sized bottles

There are times when you purchase products in varying quantities. Determine which buy/sell ratio is the most appropriate to allow your staff to invoice the item while at the same time allow you to efficiently manage invoice quantities. There are two methods you can use:

Item	Buy/Sell Ration
Deramaxx® 25mg	1 tablet = 1 tablet
Deramaxx 25mg	1 bottle = 90 tablets

Mass Changes

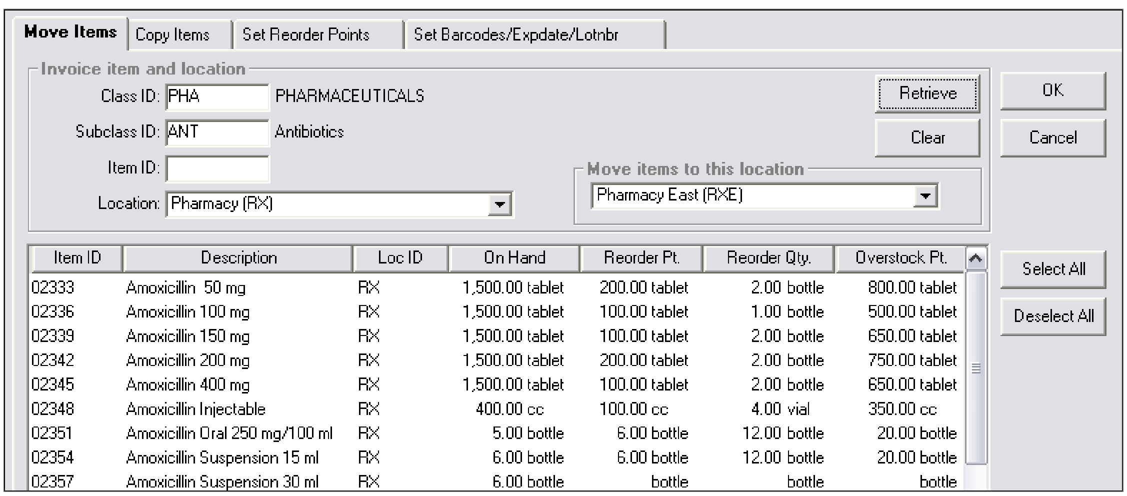
Moving Items

View a snippet online demonstration

It is very important to *make a backup* before you make any changes. You'll be reminded to do this.

You can use the **Move Items** tab on the Inventory Setup window to move an invoice item's reorder information and quantity on hand from one location to another.

tip If initiating the use of additional locations, this tool is the best method to "move" items from a single location (Central Storage) to new locations (e.g., refrigerator, controlled substance cabinet, food room, etc.), using item classifications.



Item ID	Description	Loc ID	On Hand	Reorder Pt.	Reorder Qty.	Overstock Pt.
02333	Amoxicillin 50 mg	RX	1,500.00 tablet	200.00 tablet	2.00 bottle	800.00 tablet
02336	Amoxicillin 100 mg	RX	1,500.00 tablet	100.00 tablet	1.00 bottle	500.00 tablet
02339	Amoxicillin 150 mg	RX	1,500.00 tablet	100.00 tablet	2.00 bottle	650.00 tablet
02342	Amoxicillin 200 mg	RX	1,500.00 tablet	200.00 tablet	2.00 bottle	750.00 tablet
02345	Amoxicillin 400 mg	RX	1,500.00 tablet	100.00 tablet	2.00 bottle	650.00 tablet
02348	Amoxicillin Injectable	RX	400.00 cc	100.00 cc	4.00 vial	350.00 cc
02351	Amoxicillin Oral 250 mg/100 ml	RX	5.00 bottle	6.00 bottle	12.00 bottle	20.00 bottle
02354	Amoxicillin Suspension 15 ml	RX	6.00 bottle	6.00 bottle	12.00 bottle	20.00 bottle
02357	Amoxicillin Suspension 30 ml	RX	6.00 bottle	bottle	bottle	bottle

Inventory items can be moved to active or inactive locations; however, inventory items can be depleted only from active locations.

To move reorder information and quantity on hand:

1. On the menu, select **Tools > Invoice Items Setup**.

   When the backup warning message appears, click **Yes** (if necessary, first make an appropriate backup).

2. Click the **Move Items** tab.
3. Enter the search criteria and location information.
4. Click **Retrieve**.
5. Select the items for which you want to move reorder information and quantity on hand.

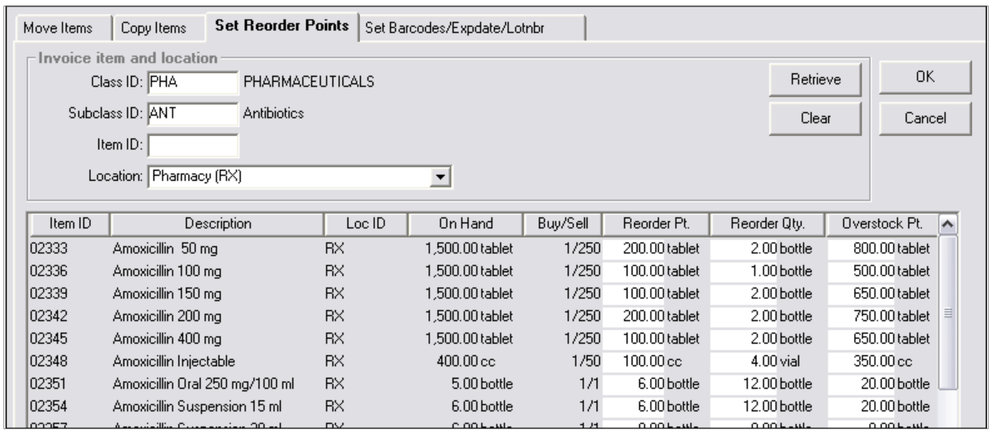
6. Click **OK**.
7. A message window lists the quantities of items saved and/or items with errors. Click **OK** to close the window.

    If the system encounters errors in the process of moving items, it indicates the number of errors and directs you to the Inventory—Setup Error Report.

Setting Reorder Points

The **Set Reorder Points** tab on the Invoice Item Setup window allows you to set reorder points for multiple items at one time. You will learn how to set multiple reorder points for a specific location.

This window displays only those items that are set to track quantity on hand. Care should be taken to ensure buy/sell ratios are correct prior to setting reorder points.



To change the reorder point, reorder quantity, and overstock point for an item:

1. On the menu, select **Tools > Invoice Item Setup**.

    When the backup warning message appears, click **Yes** (if necessary, first make an appropriate backup).

2. Click the **Set Reorder Points** tab.
3. Enter the search criteria and location information.
4. Click **Retrieve**.
5. Set the new reorder points, reorder quantities, and overstock points for the selected items.
6. Click **OK**.
7. A message window will display the quantities of items saved and/or items with errors. Click **OK** to close the window.

    If the overstock point is less than the reorder point plus the value of the reorder quantity plus one, a message displays. Change the numbers and quantities appropriately and continue.

8. Click **OK**.
9. A message window lists the quantities of items saved and/or items with errors. Click **OK** to close the window.

    If the system encounters errors in the process of moving items, it indicates the number of errors and directs you to the Inventory—Setup Error Report.

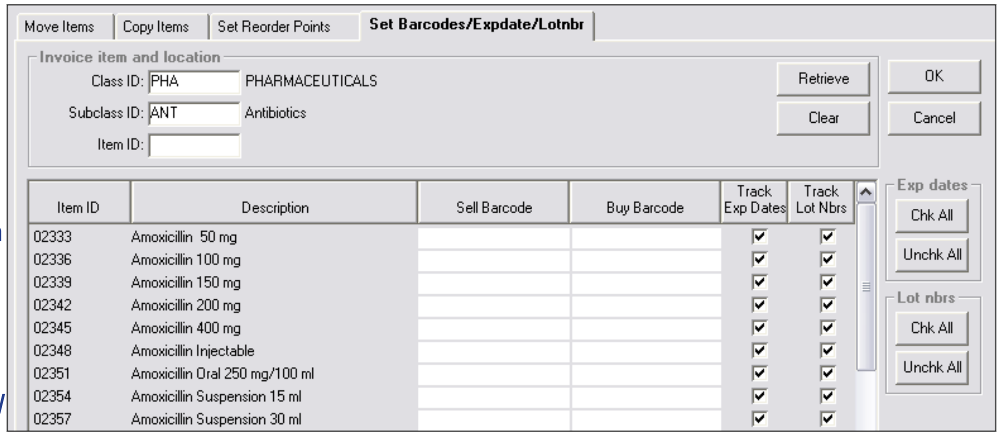
    tip After QOH tracking and buy/sell ratios are set up for an inventory item, use the Invoice Item Setup tool (**Tools > Invoice Item Setup**) to set reorder points and expiration date/lot number tracking.

Setting Barcodes, Expiration Dates, and Lot Numbers

View a snippet online demonstration

Use the **Set Barcodes/Expdate/Lotnbr** tab on the Invoice Item Setup window to set buy and sell barcodes, as well as set invoice items to track expiration dates and lot numbers. You can set barcodes, expiration dates, and lot numbers for a specific location or multiple locations.

Access the **Set Barcodes, Expiration Dates and Lot Numbers** tab by selecting **Tools > Inventory Setup >** select **Set Barcodes/Expdate/Lotnbr** tab.



tip

- The **Expiration Date** check box must be selected on items for which you will track expiration dates. To update a single item's expiration date check box, go to **Lists > Invoice Item >** select an item **>** select **Inventory** tab.
- To update multiple item expiration dates, go to **Tools > Invoice Item Setup >** select **Set Barcode/Expdate/Lotnbr** tab.
  - Initially, when one or more items have been marked to track expiration dates, a message will display asking if you want your existing expiration dates copied into inventory where dates are available.
  - If expiration dates have been changed on any of the invoice items prior to opening the Invoice Item Setup window and making changes, those invoice item expiration dates will remain unchanged.
- When turning on expiration date or lot number tracking for first time, and existing QOHs are already listed, it is advisable to immediately update the current QOH with expiration date and lot number information. (Update from the View Quantity on Hand window.)
- It is important that your staff knows how to correctly complete the task of inventory verification if the expiration date and/or lot number do not readily appear. This is done by double-clicking in the location or lot number field of inventory details window.

To add a buy and sell barcode and track or remove the expiration date/lot number for an item:

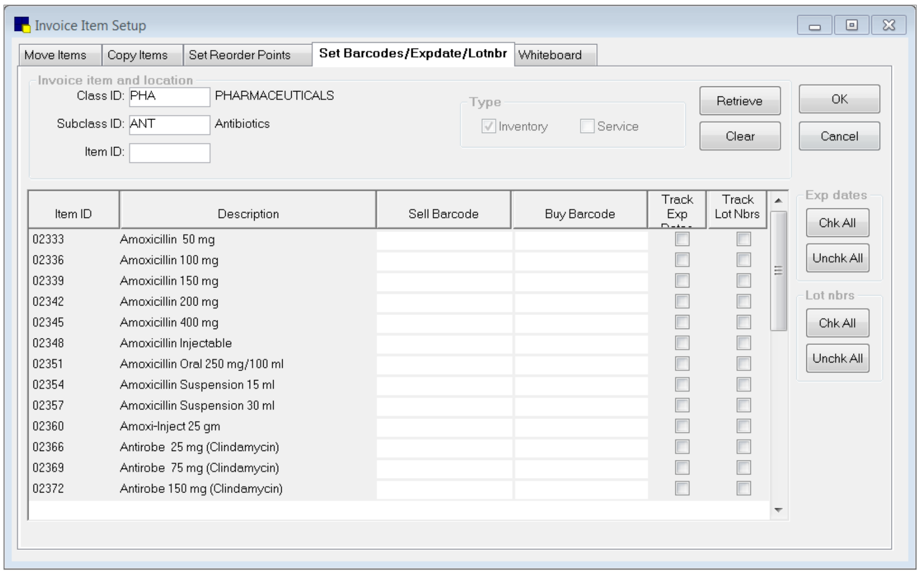
1. On the menu, select **Tools > Invoice Item Setup**.

   When the backup warning message appears, click **Yes** (if necessary, first make an appropriate backup).
2. Click the **Set Barcodes/Expdate/Lotnbr** tab.
3. A window displays a warning message: If you clear the **Track Exp Dates** check box for an item, all the expiration dates for the item will be lost. If you clear the **Track Lot Nbrs** check box for an item, all the lot numbers for the item will be lost. Read the warning and click **OK**.
4. Enter the search criteria.
5. Click **Retrieve**.
6. Enter the appropriate information for buy barcodes and sell barcodes, and then select or clear the check boxes to track lot numbers and expiration dates.
7. Click **OK**.

8. When the warning message (same as step 2) appears, click **Yes** after reviewing changed information.
9. A message window lists the quantities of items saved and/or items with an error (if applicable). Click **OK** to close the window.

For information about barcode readers, which can automatically scan and enter these barcodes for you, please contact IDEXX Computer Systems at 1-800-283-8386.

If the system encounters errors in the process of moving items, it indicates the number of errors and directs you to the Inventory—Setup Error Report.



Phase 4: Inventory Cleanup Procedures and Defaults

View a snippet online demonstration

Checklist—Invoice Item Counts and Costs

These instructions will assist you in the inventory clean-up procedure.

Task	Details
1. Review the Invoice Item Setup Report.	• Are there items that you no longer sell or that should be inactivated? • Are there items that are in the wrong classification?
2. Choose a class to begin working on (e.g., Food or Nutritional) and complete setup on each item in this class.	• **Information** tab—Set the correct selling unit of measure and pricing information. Be sure to include price breaks, as needed. • **Inventory** tab—Select the maintain QOH, buy/sell ratio, location, and set reorder information (reorder point, reorder quantity, overstock point). Select to track expiration dates and track lot numbers, as needed.
3. Receive any vendor invoices that have not been entered in Cornerstone.	• Enter receipts to ensure cost history is up-to-date prior to adjusting. This will ensure quantities will not be incorrect again after adjustments are made.
4. Print the Inventory—Counts Report for the class of items you setup.	• Use this report to do a physical count of your inventory items.
5. Using the count totals written on the Inventory-Counts Report, adjust your quantity on hand.	• Make adjustments using the View Quantity on Hand or Adjustment List windows. Adjust immediately after counting and before any other invoicing is completed.
6. Review the cost on hand of the inventory items adjusted. Adjust the average cost of each inventory item, as needed.	• View the inventory cost on hand in the View Quantity on Hand window. • Complete cost adjustments in the Adjustment List.
7. Repeat, starting at step 2, for another class.	• Begin by working on the item classes that have the most activity.

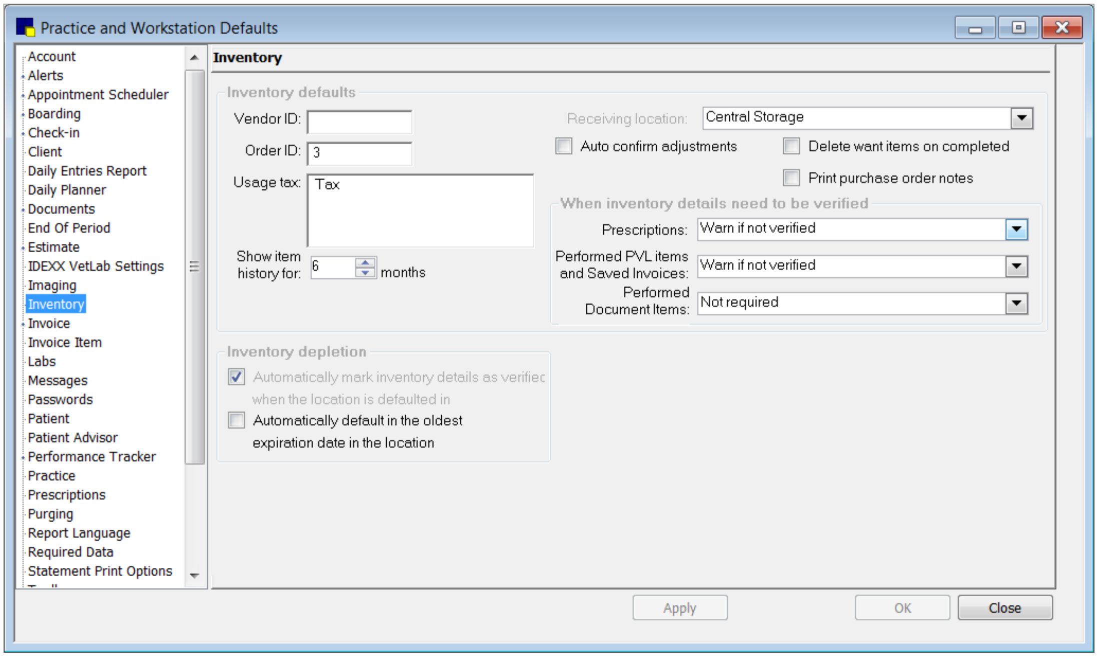
Practice Defaults

View a snippet online demonstration

If your practice uses IDEXX SmartOrder* electronic inventory ordering, see "IDEXX SmartOrder* Inventory Solution" on page 63 for additional setup information.

Setting the Inventory Defaults

To access the inventory default settings select **Controls > Defaults > Practice and Workstation > Inventory**.



The **Inventory defaults** area includes the following fields:

- **Vendor ID** box—The ID will automatically appear as the primary vendor in the Item Vendor Information window when setting up inventory information on invoice items.
- **Order ID** field—Enter a beginning number used to track purchase orders in Inventory. This is the number to begin numbering new purchase orders.
- **Usage Tax** box—Select each tax that applies to items used internally by the practice, if applicable.

  If the usage tax does not display on the list, set up the tax in **Controls > Taxes**.
- **Show item history for** box—Enter the number of months for which item history will display.

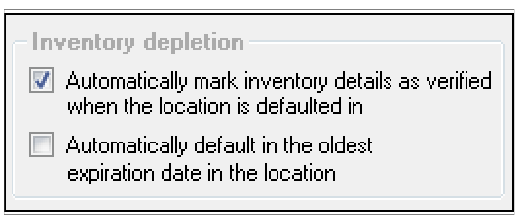
  tip Twelve months or more is recommended for the item history setting.
- **Receiving location** list—Displays the location at which items are received.
- Check boxes:
  - **Auto confirm adjustments**
  - **Delete want items on completed** (order)
  - **Print purchase order notes**

The **When inventory details need to be verified** area (for items tracking lot numbers and expiration dates) includes the following fields:

- **Prescriptions**— Inventory details are required for a prescription when you post an invoice; however, you can require inventory details earlier, when the prescription is created. From the list, select one of the following.
  - **Not required**—Do not require inventory details when the prescription is created.
  - **Warn if not verified**—Display a warning if inventory details are not filled in and verified when the prescription is created.
  - **Required**—Require staff to fill in inventory details and mark as verified when the prescription is created.
- **Performed PVL items and Saved Invoices**—Inventory details are required when you post an invoice; however, you can require inventory details earlier when you save the Patient Visit List (PVL) and invoices. From the list, select one of the following:
  - **Not required**—Do not require inventory details when the Patient Vist List (PVL) or invoice is saved.
  - **Warn if not verified**—Display a warning if inventory details are not filled in and verified when the PVL or invoice is saved.
  - **Required**—Require staff to fill in inventory details and mark as verified before they can save the PVL or invoice.
- **Performed Document Items**—You can specify what should happen if a staff member tries to send invoice items from a document (medical note or correspondence) to the PVL when inventory details have not been verified. From the list, select one of the following:
  - **Not required**—Do not require inventory details to be verified at the time that the invoice items are sent from the document to the PVL. (The inventory details would still need to be verified later on the PVL or invoice.)
  - **Warn if not verified**—Display a warning if inventory details are not filled in and verified at the time that the invoice items are sent from the document to the PVL. (The inventory details would still need to be verified later on the PVL or invoice.)
  - **Required**—Require staff to fill in inventory details and mark as verified before they can send invoice items from a document to the PVL.

Inventory Depletion Default Setting

For single location inventory, the inventory depletion setting default is **Automatically mark inventory details as verified when the location is defaulted in** and it cannot be changed.



You may still need to verify the depletion when you are tracking lot numbers and/or expiration dates for the invoice item.

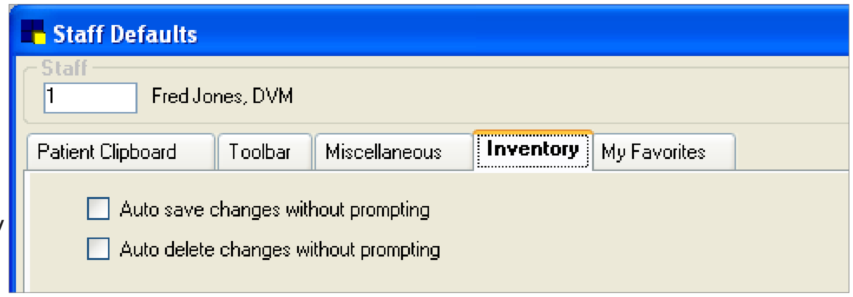
tip To display an alert to verify if the prescription quantity is one, select the **Warn user when quantity is 1** check box in the Prescriptions default settings (**Controls > Defaults > Practice and Workstation > Prescriptions**).

Staff Inventory Default Settings

View a snippet online demonstration

To review the default inventory information for the logged in staff member:

1. On the menu, select **Controls > Defaults > Staff**.
2. In the **Staff ID** box, enter the staff ID and press **Tab**, or double-click or press F2 to search for the staff member.
3. Click the **Inventory** tab.
4. Optional: Select the **Auto save changes without prompting** and/or **Auto delete without prompting** check boxes.
5. Click **Save** to save the settings.
6. Click **Print** to view a list of default inventory locations by staff, and then click **Cancel.**
7. Click **OK** to exit the Staff Defaults window.

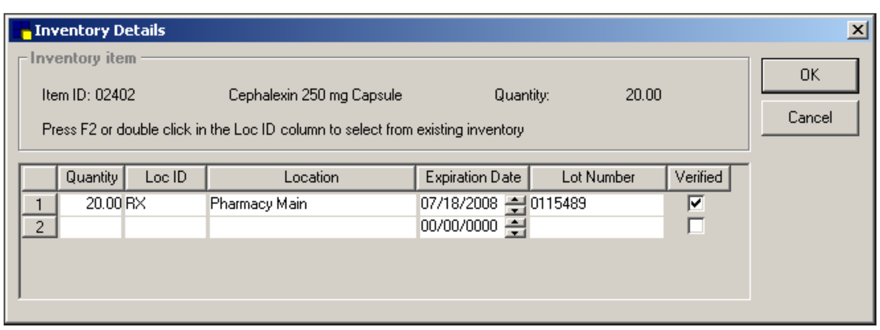


Communication and Training—Decision Making

Communicating the implementation of the new inventory process to your staff and careful decision making in the inventory setup process is important for your success in implementing Cornerstone inventory. View the Sample Inventory Communication Plan on the next page.

Depending on how you use the features in inventory, it may have an impact on how you use Cornerstone. If you plan to track lot numbers and expiration dates, you will be required to enter those prior to or during the invoice process. It is important to have a plan in place for communicating these lot numbers and/or expiration dates to the staff responsible for prescription labels and entering the charges on the Patient Visit List or invoice.

If expiration dates and lot numbers are manually entered during invoicing, it will result in negative quantities on hand (QOH) for the lot number that was manually entered and will have to be manually adjusted. Therefore, manually entering QOH is not recommended.



Sample Inventory Communication Plan

An inventory communication plan is a beneficial tool for staff members. Any employee who receives or uses tracked inventory will need to be prepared to enter inventory details (tracking information). The following sample memo can be used to communicate changes to your staff.

Memo

Date: January 1, 2013

To: Practice Staff

From: Practice Management Team

RE: New IDEXX Cornerstone Inventory Features

Dear Staff,

Memo Purpose

You will soon experience a new improved look, feel, and functionality in Cornerstone software related to inventory tracking. We want to prepare you for this, communicate the benefits, and provide you with action to take that will be necessary in order to achieve this new level of performance.

Benefits

The benefits to our practice are multifold. When inventory tracking is used for an invoice item, it could mean:

- Inventory in locations can be monitored and we'll be alerted when a certain location is low.
- If a product is recalled by the vendor, we'll be able to identify which clients were sold an invoice item with a specific lot number or expiration date in order to take proper action.

Your Action

We need your help to make this happen. Please take action in the following ways:

- Complete the training when prompted.
- When entering inventory information, either during purchasing or providing patient care, ensure the inventory information is entered accurately.
- Encourage and support others as they utilize inventory-related Cornerstone features.
- Consider operational changes that we may need to make and bring them to management's attention so proper procedures can be adjusted.

Our Actions Together

Together, we will review performance and make necessary adjustments to meet our patient care needs.

Sincerely,

Practice Management Team

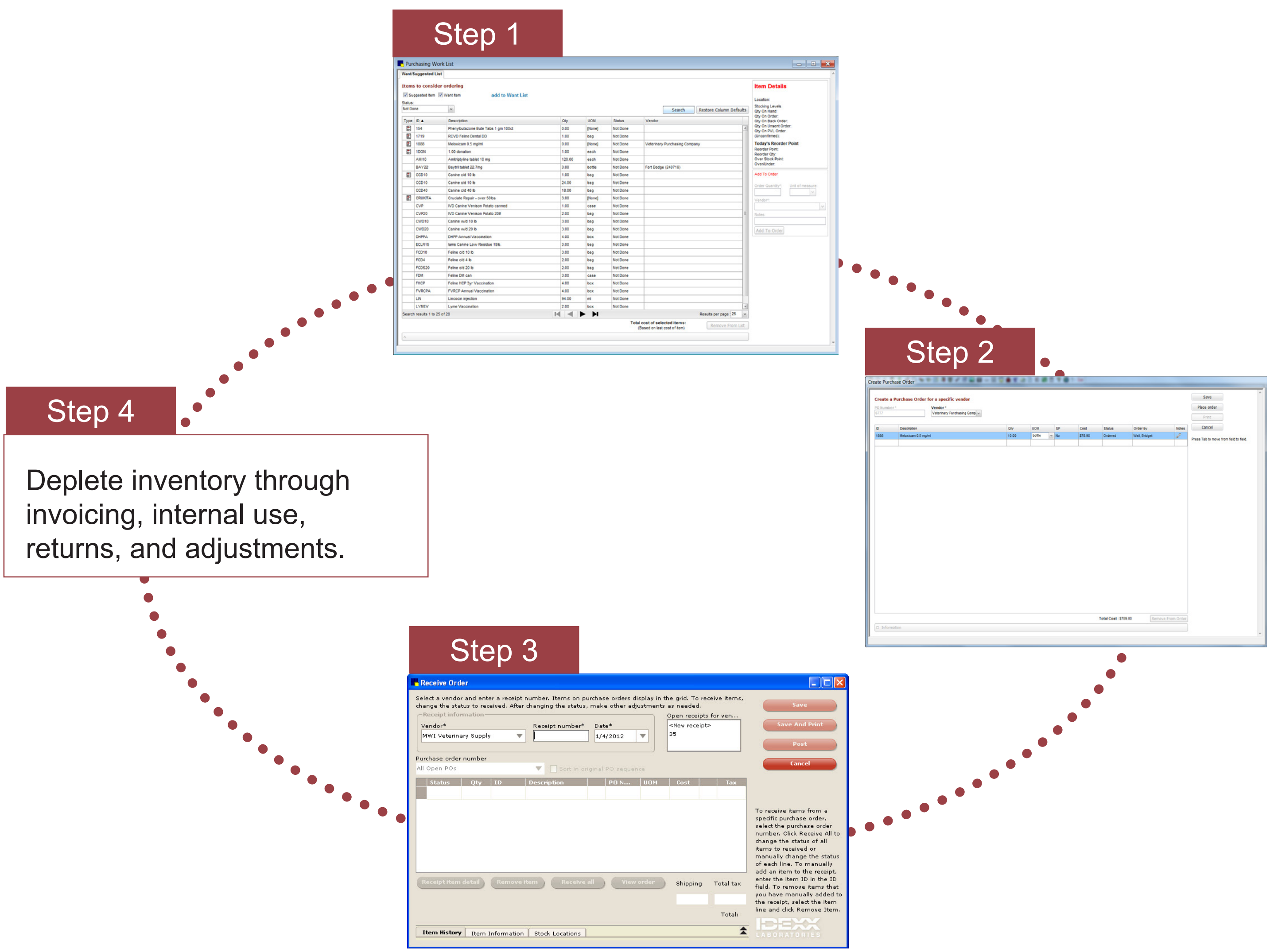
Phase 5: Deplete/Adjust/Move

The diagram below shows the inventory work flow. The numbered steps correspond to the diagram. For detailed information, see “Depletion, Quantity on Hand, and Cost Adjustments” on page 54.

The work flow includes the following steps.

1. Purchasing Work List
2. Purchase Order
3. Receive Order
4. Deplete
   - Invoicing (direct or indirect via linking)
   - Performed PVL or document Items
   - Internal stock use
   - Return to vendor
   - Adjustments

Inventory Work Flow Diagram



Purchase

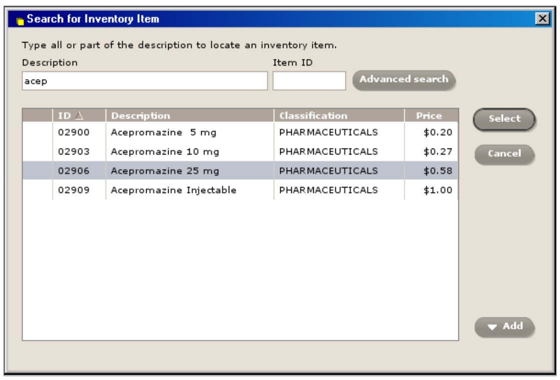
Searching for Inventory Items

Inventory Item Search Overview

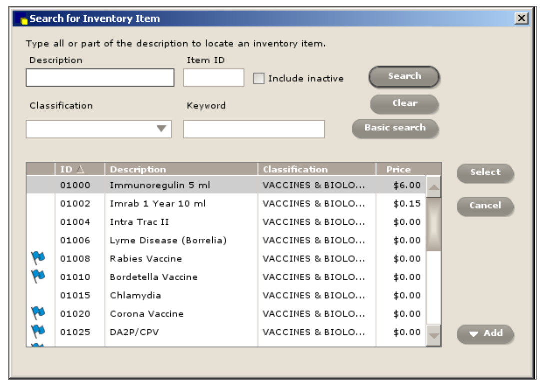
View a snippet online demonstration

The *Search* for Inventory Item window in the IDEXX Cornerstone* Practice Management System is used to search for and select items in Cornerstone inventory.

To access this window, press F2 or double click in one of the searchable item fields located throughout inventory or click the magnifying glass icon located next to the item box.



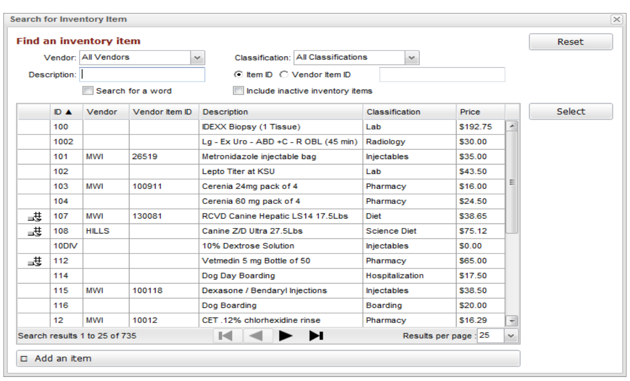
Basic Search for Inventory Item window



Advanced Search for Inventory Item window

If a flag icon displays next to an item, the item is marked to Maintain QOH.

When you access the Search for Inventory Item window from the Want List, the Create/Edit Purchase Order window, or the Purchasing Work List, the window is enhanced. Items marked to maintain QOH are indicated by . In addition, the search fields vary slightly on the different versions of Search for Inventory window.



Enhanced Search for Inventory Item window

Basic Search for an Inventory Item

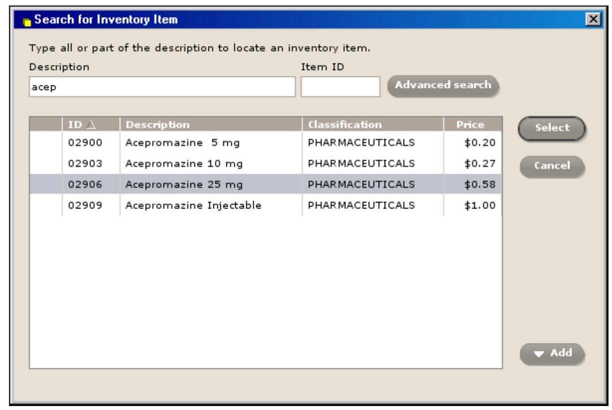
View a snippet online demonstration

To perform a basic search for an item from the View Quantity on Hand window.

1. On the menu, select **Inventory > View Quantity on Hand**.
2. In the **Item** box, press F2 or click the magnifying glass icon to open the Search for Inventory Item window.

3. Type the first few letters of the item you are searching for in the **Description** box.

   Any inventory items that match the search criteria display in the list.



4. Select the item you searched for.

   The blue flag indicates the items that are tracking quantity on hand.

5. Click **Select**. The item's description displays in the **Item** box.
6. Close all open windows.

When accessed from the Want List, Create/Edit Purchase Order, or Purchasing Work List windows, the enhanced Search for Inventory Item window opens. For more information, see "Inventory Item Search Overview" on the previous page and the procedure below.

Advanced/Enhanced Search for an Inventory Item

View a snippet online demonstration

To search for an item from the advanced or enhanced search window.

See the previous page for more information about advanced and enhanced search windows.

1. From the Search for Inventory Item window, click **Advanced** (this is not necessary for the enhanced window).

   tip Click **Clear** (advanced) or **Reset** (enhanced) to remove the current search criteria and begin a new search.

2. From the **Vendor** list (enhanced only), select the vendor.
3. Type all or part of the word in the **Description** box.
4. Type an item ID, or a portion of the ID, in the **Item** (advanced) or **Item ID** (enhanced) box. In the enhanced window, you can also opt to enter the vendor item ID in the **Vendor Item ID** box.
5. Select the **Include inactive** check box to include inventory items that have a status of inactive.
6. From the **Classification** list, select a class of items to search within.
7. Type an item ID, item description, or a portion of the ID or description in the **Keyword** box (advanced).
   OR
   Select the **Search for a word** check box to search using text in the **Description** box (enhanced).
8. Click **Search** (advanced). On the enhanced window, the search is conducted automatically.

Tasks for Creating a Purchase Order

View a snippet online demonstration

WANT/SUGGESTED LIST OVERVIEW

The **Want/Suggested List** tab on the Purchasing Work List window is used to display:

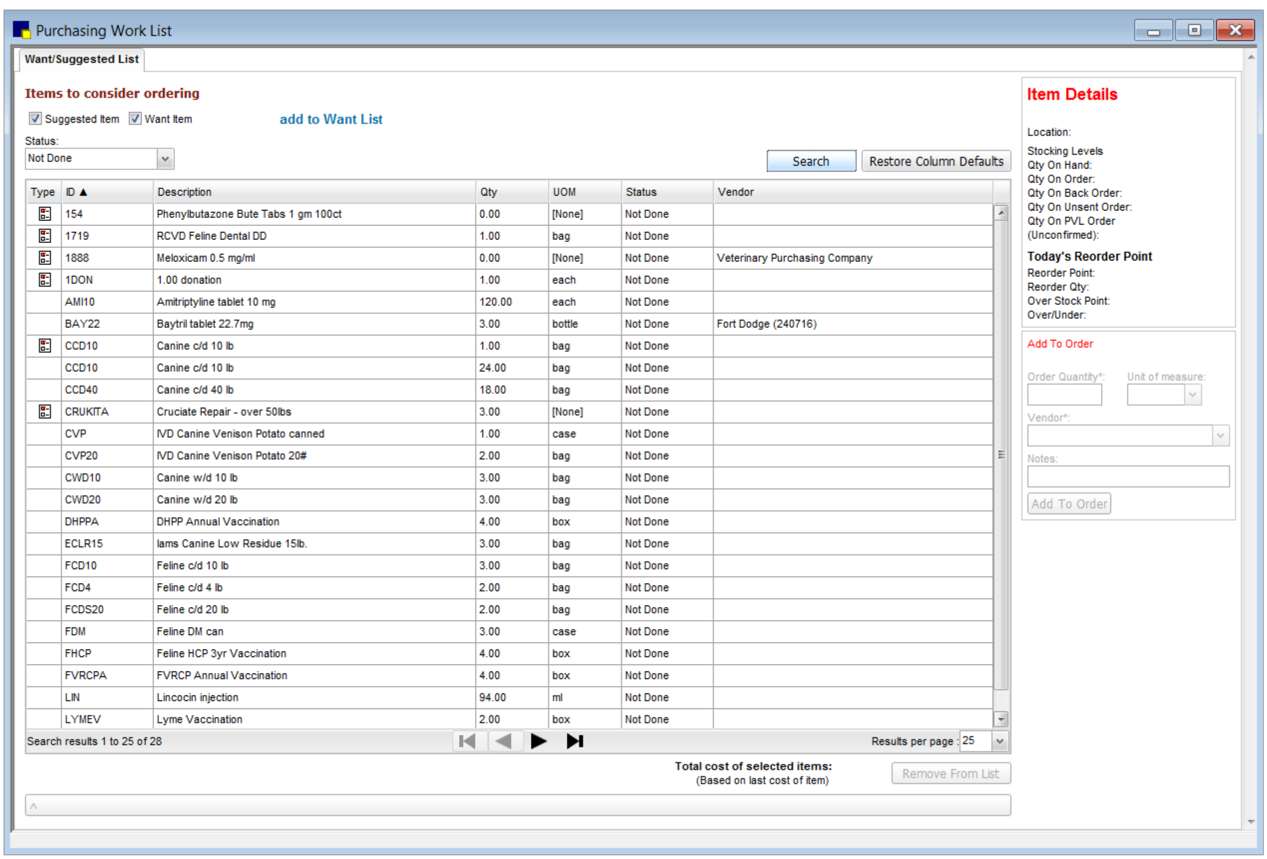
- Items that have been requested by employees (**Want item** check box selected).
- Items that are at or below the reorder point (**Suggested item** check box selected).

  Only Want List Items can be deleted from the **Want/Suggested List** tab.

When looking for specific items in the **Want/Suggested List** tab of the Purchasing Work List, select an option from one of the available criteria lists. Items requested that match the criteria display in the **Want/Suggested List** tab.

The **Want/Suggested** tab includes the following fields:

- **Status**—Select a status to view only items with the specified status. Options include **All Statuses**, **Not Done**, or **Completed (Want Items Only)**. The availability of completed items is based on inventory default settings.
- **Want item**—Select this check box to include items requested by staff on the Want List.
- **Suggested item**—Select this option to view items that are at or below the reorder points set up by the practice. Reorder points are set up on individual item records (go to **Lists > Invoice Item**, select the item and click **Update**, and then click the **Inventory** tab).



Adding Items to the Want List

View a snippet online demonstration

To add an item to the Want List:

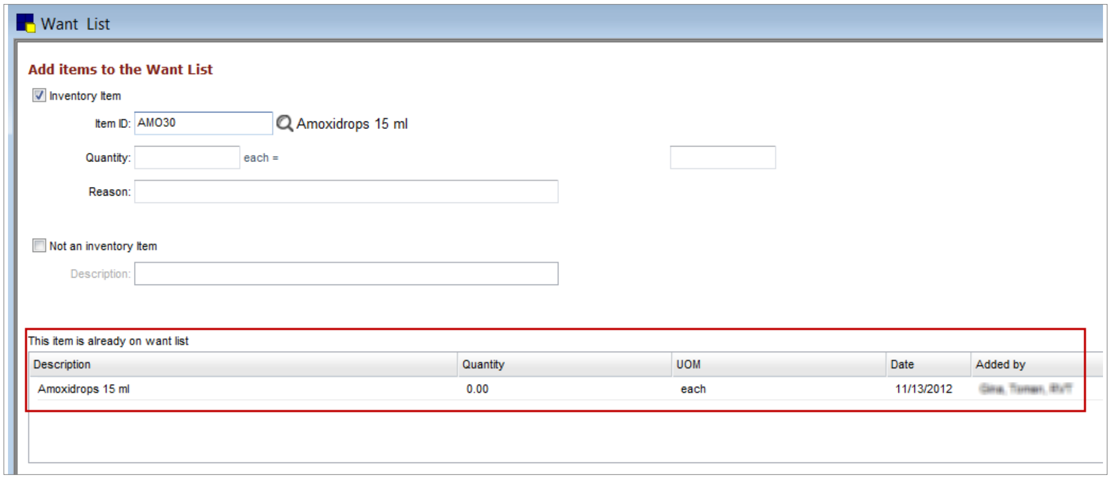
1. Select the **Want List** button on the toolbar.
2. If the item is an inventory item, select the **Inventory Item** check box. In the **Item ID** box, type the item ID, press F2, or click the magnifying glass icon to search for and select the item. In the **Quantity** box, enter the number of this item you want. Then, go to step 3.
   OR
   If the item is not an inventory item, select the **Not an Inventory Item** check box and type a description of the item in the **Description** box. Then, go to step 4.
3. In the **Reason** box, type a reason.
4. Click **OK**.
5. Repeat steps 2-4.
6. Click **Cancel** to close the window.

tip If you have appropriate security, you can view the list of items that users have placed on the Want List by selecting **Purchasing Work List** and view the Want List Report by selecting **Reports > Inventory > Want List Report**.

Items without an item ID code can be added to the Want List.

If an item ID is added more than once to the Want List, the list expands and shows who added it, the quantity added, and when it was added.

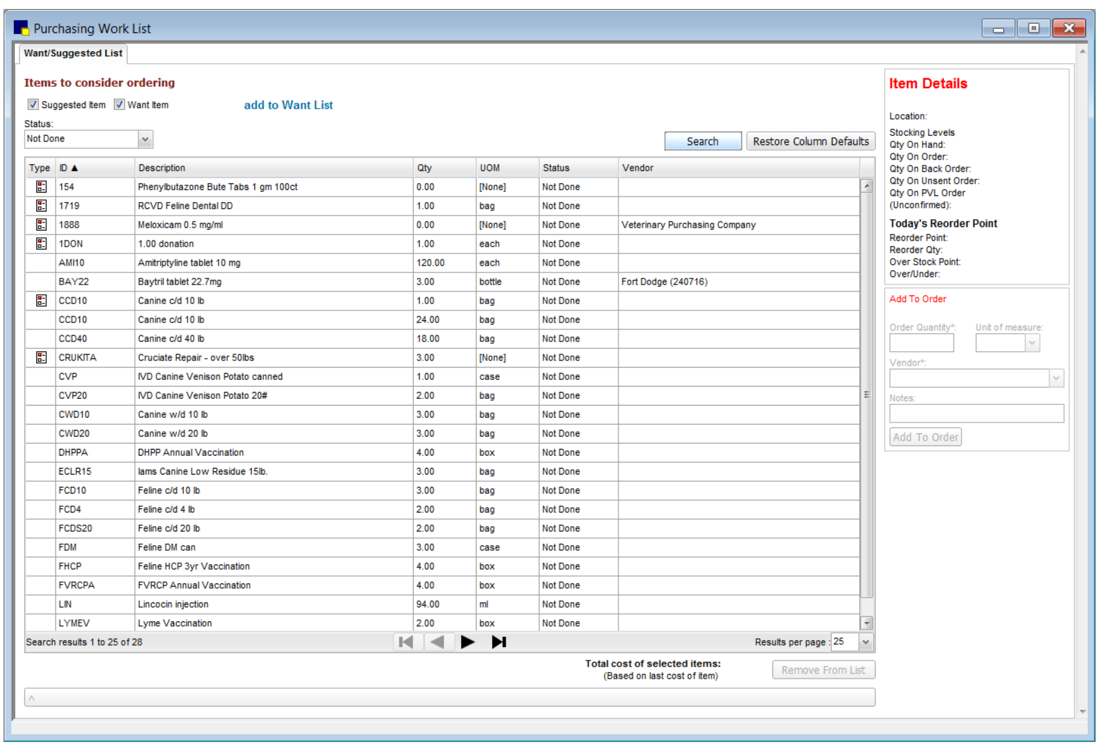
Details added to the **Reason** box appear on the Purchase Order window.



Purchasing Work List Overview

The Purchasing Work List window allows you to view items requested by staff and those suggested by the system, add items to a purchase order, and transfer items from one location to another location (only for multi-location setup). Open the window by selecting **Inventory > Purchasing Work List**.

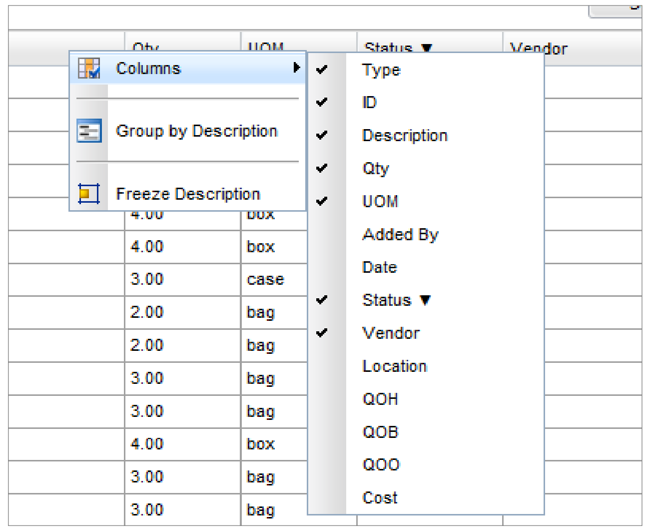
- On the **Want/Suggested List** tab, view items requested by staff or suggested by the system.
- The **Item Details** area displays general information for an item based on the location selected, including a link to sales information for a selected item on the Purchasing Work List.
- The **Add to Order** area is used to add one or more items to a purchase order.
- The **More Item Information For [item]** area includes detailed item information, history, and stock locations.
- The **add to Want List** link opens the Want List window.



Arrange Columns

View a snippet online demonstration

To arrange and add columns to the Purchasing Work List:



1. On the menu, select **Inventory > Purchasing Work List**.
2. Click **Search**.
3. Click the **Description** column header. The items are sorted in ascending order.
4. Click the **Description** column header again. The items are sorted in descending order.
5. Right click a column header and point to **Columns**. A list of columns displays.
6. Select a column that does not have a check mark next to it to add it.
   OR
   Select a column that does have a check mark next to it to remove it. This will remove the column from view.

These selections are based on user login. Once a selection is made by a user it will remain in that user's preferences.

tip Sort inventory windows by clicking on any of the column headers. On most inventory windows, each logged in user can add, remove, and arrange columns to suit their individual needs.

Deleting a Want List Item

View a snippet online demonstration

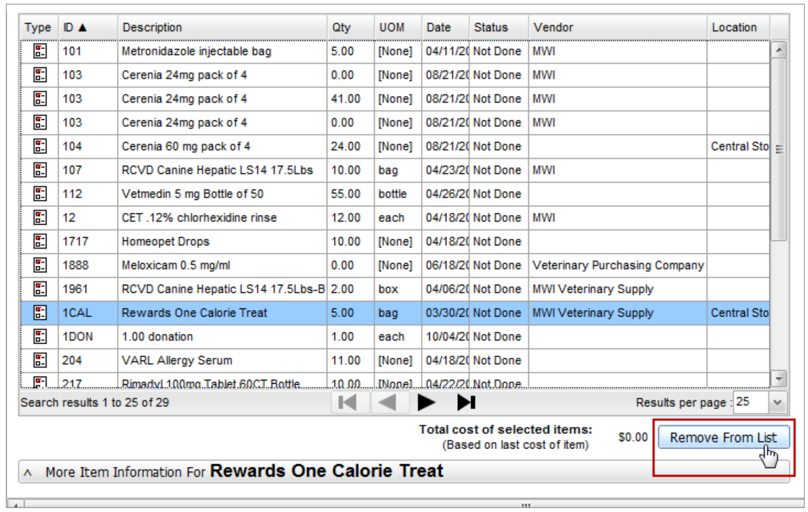
To delete an item from the Want List:

1. On the menu, select **Inventory > Purchasing Work List**.
2. Clear the **Suggested items** check box.
3. Click **Search**.
4. Select the item that does not need to be ordered and click **Remove from list**.
5. If the confirmation window appears, click **Yes**.
6. Close any open windows.

tip When selecting more than one item to delete, press the SHIFT key to select a consecutive group of items and the CTRL key to select nonconsecutive items on the list.

Adding an Item to a Purchase Order from the Purchasing Work List

View a snippet online demonstration



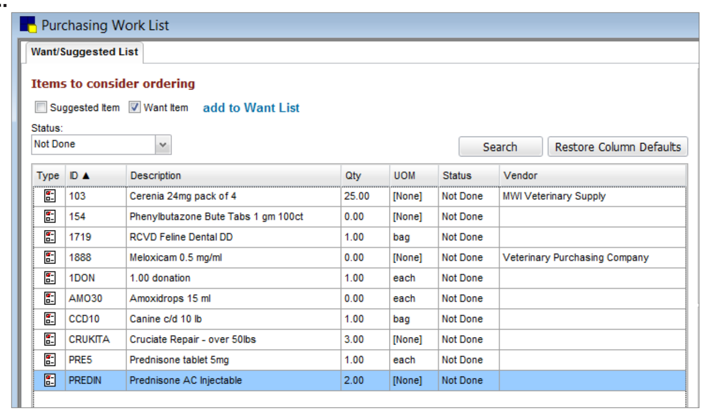
Using the Purchasing Work List, you can create purchase orders from the Want List, Suggested List, or the combination of the two lists. Additionally, you can manually enter them through **Inventory > Order List**.

The benefits of purchase orders are as follows:

- Serve as records of orders.
- Allow you to access information when confirming orders with a vendor.
- Allow you to manage discrepancies on large orders.
- Serve as a method to track back orders (you can't track through entering receipts only).

To create a purchase order from the Purchasing Work List window:

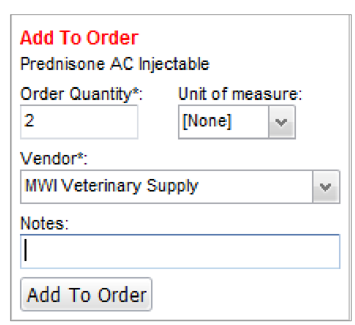
1. On the menu, select **Inventory > Purchasing Work List.**
2. If you want to create an order based only on the Want List, clear the **Suggested item** check box.
3. Select the item you want to add to the order.
4. In the **Add to Order** area, in the **Order Quantity** box, type the quantity.
5. Optional: Select the buying unit of measure for the product being ordered from the **Unit of measure** list.
6. From the **Vendor** list, select the vendor you are placing the order with.
7. Optional: Enter or update any notes about the order. You may see notes here based on tasks in a previous section.



8. Click **Add to Order** to create a new purchase order. The Create Purchase Order window opens.

   If a purchase order already exists for the vendor, the Edit Purchase Order window opens and the item will be added to the existing purchase order.

9. Enter a number in the **PO number** box and press **Tab**. The item is now listed on the purchase order.
10. Click **Save**.
11. Close the Purchasing Work List.



Adding an Item to the Want List from the Purchasing Work List

To quickly add an item to the Want List from the Purchasing Work List:

1. Click the **add to Want List** link.
2. Select the **Inventory item** check box or the **Not an inventory item** check box and complete the required information.
3. Click **OK**.

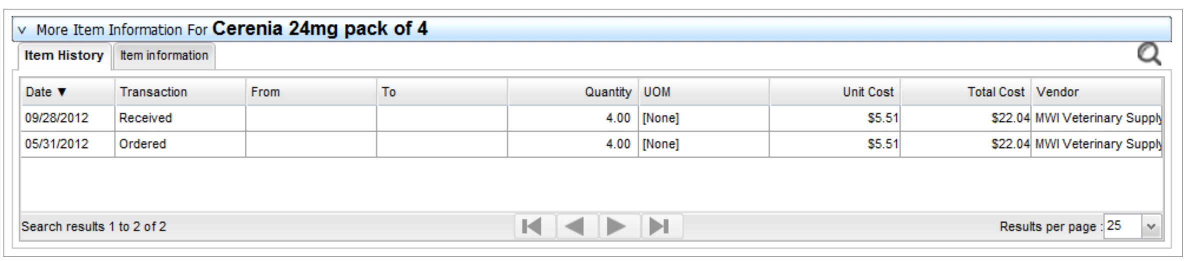
Viewing Item History and Item Information

View a snippet online demonstration

You can view item history and item information for items in inventory. The way you access this information is different for the different style inventory windows in the Cornerstone software.

To view item information from the Want List, Purchasing Work List, and Add or Edit Purchase Order List windows:

1. Search for and/or select an item, and then click the **Information for [item]** or **More Information For [item]** bar (located at the bottom of the window). The **Item History** tab displays.
2. Click the **Item Information** tab to view details about the item.
3. Click the **Item History** tab to view inventory information.
4. Click the **Information for [item]** or **More Item Information for [item]** bar to close the tabs.



tip If the item is not on an available list, click the magnifying glass on the **Item History** or **Item Information** tab to search for and select the item.

To view item information from the View Quantity on Hand and Receive Order windows:

1. Search for and select an item, and then click the **Expand** button (located in the lower right area of the window). The **Item History** tab displays.
2. Click the **Item Information** tab to view details about the item.
3. Click the **Collapse** button to minimize the tabs.

tip If the item is not on an available list, click the magnifying glass on the **Item History** or **Item Information** tab to search for and select the item.

Item Details Overview

The **Item Details** area of the Purchasing Work List window displays stocking levels and reorder point information for an item selected in the Purchasing Work List.

Item information includes:

- **Item ID/Description**—The selected item's ID and description display when it is selected within any of the Purchasing Work List tabs.
- **Location**—View location of item.

Stocking Levels information includes:

- **Qty on hand**—The quantity currently available.
- **Qty on order**—The amount currently on a placed purchase order.
- **Qty on back order**—The amount currently on back order.
- **Qty on unsent order**—The amount currently on a saved, but not placed, purchase order.
- **Sales History**—Click the link to view the Sales History window for this item. This window displays the sales history for the last three years and includes year-to-date and month-to-date totals.

Today's Reorder Point information includes:

- **Reorder point**—The reorder point for a single, selected location.
- **Reorder qty**—The recommended amount to order when the reorder point is reached.
- **Overstock point**—The overstock point of the item.
- **View Details**—If seasonal reorder point information exists for the item, a link will be available.

Viewing Quantities on Hand

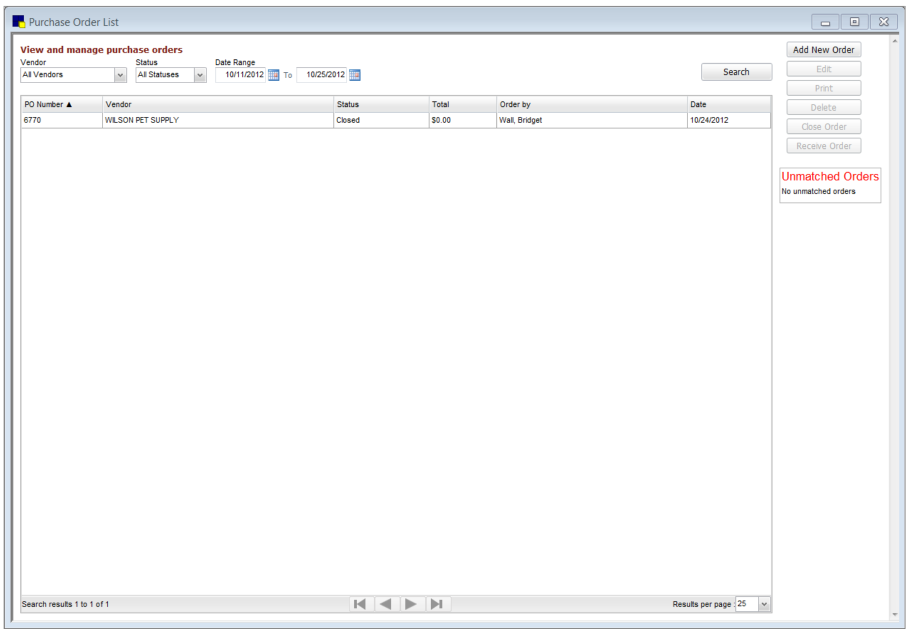
To view quantity on hand, select **Inventory > Purchasing Work List**. You can search within want or suggested items, or both, by selecting the appropriate check boxes and clicking **Search**. After you select an item from the list you can view the quantity on hand information in the **Item Details** area.

Purchase Order List Overview

View a snippet online demonstration

Use the Purchase Order List window to track items on order with vendors and orders that have been partially received from vendors within the Cornerstone* system.

To access the Purchase Order List, select **Inventory > Order List**. The Purchase Order List window automatically displays orders managed by staff/management within the past two weeks.



When looking for specific purchase orders, enter information in one or more of the criteria fields in the **View and manage purchase orders** area and click **Search**.

tip Sort inventory windows by clicking on any of the column headers. Each logged in user can add, remove, and arrange columns to suit their individual needs.

The **View and manage purchase orders** area includes the following fields:

- **Vendor**—Select a vendor to view purchase orders for the specified vendor only.
- **Status**—Select the status of the order. Options include **All Statuses**, **Closed**, **Not sent**, **Partial**, **Sent**, and **Sent online** (if applicable).
- **Date Range**—The range two weeks prior to the current system date appears in the boxes. If necessary, enter different dates.

The Purchase Order List includes the following columns:

- **PO Number**—The purchase order number.
- **Vendor**—The vendor the order was placed with.
- **Status**—The status of the order. Options include **Not sent**, **Sent**, **Partial**, and **Closed**. A **Sent-Online** status is available for orders placed using IDEXX SmartOrder*.
- **Total**—The total cost of the order.
- **Order by**—The name of the staff member who was logged in at the time the order was initially entered.

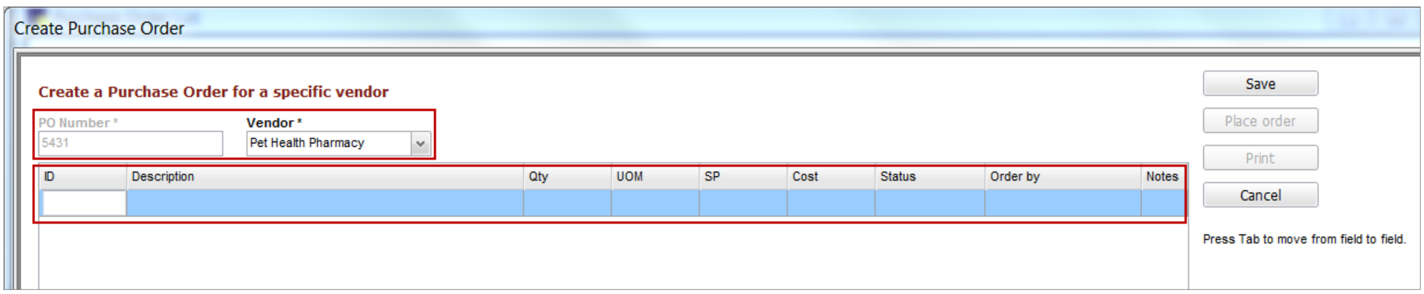
- **Date**—The last date the order was worked on.

tip A **Not sent** status indicates an order has been saved but not placed. This is useful if more items will be added to the order at a later point. A **Sent** (or **Sent-Online** for IDEXX SmartOrder*) status indicates the order is ready for the vendor and has been placed. A **Partial** status indicates the practice has received some of the items on the placed order from the vendor. A **Closed** status indicates the order was manually closed by the practice (this usually indicates the order was canceled) or that all items were received (this automatically closes the order).

Purchase Order Overview

View a snippet online demonstration

To open the Purchase Order window, select **Inventory > Order List**. Click **Add New Order** to open the Create a Purchase Order window or click **Edit** to open the Edit a Purchase Order window.



The Purchase Order window includes the following fields:

- **PO Number**—A purchase order number is a unique number that is used to track each order entered in inventory.
- **Vendor—**Select the vendor with whom the order will be placed.

The Purchase Order window includes the following columns:

- **ID**—The item ID of the product to be ordered.
- **Description**—The name of the item to be ordered. This can be manually changed but when printing the purchase order the original description displays.
- **Qty**—The total amount of the item to be ordered based on UOM. If the buy/sell ratio is set for the item and unit is changed to the selling unit, the quantity is calculated according to the ratio.
- **UOM**—The unit of measure for the item being ordered; default is the buy UOM.
- **SP**—SP indicates special price. If the item will be purchased at a special price, select **Yes** from the list. The item's vendor cost will not update when received which, in turn, will not affect the item markup. Examples of items purchased at special cost include free samples and promotional items.
- **Cost**—The unit cost of the item being ordered.
- **Extended Cost**—The total cost of the item ordered which is unit cost multiplied by quantity ordered. This is a hidden column.

  The total cost of the order is displayed at the bottom of the window.

- **Status**—The status of the item being placed on an order. Options include **Ordered** and **Backordered**.
- **Order by**—Lists the name of the staff member who is currently logged in.
- **Notes**—General information pertaining to the item being ordered.
- **Back Ordered**—The quantity back ordered, if applicable. This is a hidden column.
- **Canceled—**The quantity canceled, if applicable. This is a hidden column.

- **Received—**The quantity received, if applicable. This is a hidden column.
- **Special offers—**Displays any special offer information when using IDEXX SmartOrder* electronic inventory ordering. This is a hidden column.
- **Track—**For orders placed using IDEXX SmartOrder, displays tracking information. This is a hidden column.

For IDEXX SmartOrder* users, fulfillment and support information displays when placing orders online through MWI® Veterinary Supply.

An asterisk (*) indicates a required field. If the field is left blank or the information in the field is a duplicate of another entry, a message will display.

Creating Purchase Orders

View a snippet online demonstration

To create a new purchase order:

1. On the menu, select **Inventory > Order List**.
2. Click **Add New Order**.
3. In the **PO Number** box, press Tab or type an order number.

   The Cornerstone software provides a sequential number based on inventory defaults. You can also enter a number provided by your vendor.
4. From the **Vendor** list, select the vendor you're placing the order with.
5. In the invoice item grid, in the first ID field, type the item ID, or double-click or press F2 to search for and select the item.
6. In the **Quantity** field, type the quantity.
7. Optional: Change the unit of measure. The buying unit of measure automatically displays. Change the buying unit of measure if you are ordering a nonstandard quantity.
8. Optional: If this is an item being purchased at a special price that shouldn't affect the item markup or vendor cost, select **Yes** from the list in the **SP** column.
9. Optional: Enter the unit cost of the product, if known. The last cost entered for the item will automatically appear in the cost field.

   Any inventory item can be ordered, regardless of QOH tracking status.

   tip Ensure the cost entered matches the UOM on the purchase order.
10. Verify the status is Ordered.
11. Optional: Click the **Note** icon and type any notes.
12. Continue placing the rest of items on your purchase order.
13. Click **Save** to save to be able to return to the order and edit it or click **Place Order**. The Order List window displays the new order.
14. Close all open windows.

Creating a Purchase Order with IDEXX SmartOrder* Electronic Inventory Ordering

Before you create a purchase order with IDEXX SmartOrder*, read "IDEXX SmartOrder* Inventory Solution" on page 63 for important set up and use information.

To create an electronic inventory purchase order:

1. On the menu, select **Inventory > Order List**.
2. Click **Add New Order**.
3. In the **PO Number** box, press Tab or type an order number.
4. From the **Vendor** list, select **MWI Veterinary Supply** or your practice-specific associated vendor for MWI as the vendor.
5. In the invoice item grid, in the first **ID** field, type the item ID, or double-click or press F2 to search for and select the item to order.

   Once an item has been entered in the grid, Cornerstone performs a real-time check to verify the following:
   - Item has a matching MWI vendor item ID
   - Ordered item quantity is available
   - Item cost
   - Any available quantity discounts

   An invoice item line marked "Back order" displays if the item is on back order with the selected vendor. Contact MWI directly to check on expected date of availability.
6. A link for the MWI fulfillment and support terms of sale is displayed on the right side of the Purchase Order window. Click the link to review the order. A link where you can review MWI's terms and conditions is also available.
7. Click **Place Order**.

When you place an order through IDEXX SmartOrder, the order is sent to MWI for fulfillment. MWI is fully responsible for fulfillment of your order, including providing customer support related to your order.

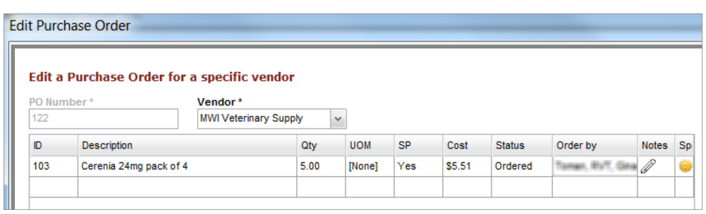
If you have a credit card on file at MWI and are set up to be billed by credit card, you will be billed when you place the order. You will not be able to pay by credit card when you receive the order.

Modifying a Purchase Order

To modify a purchase order:

1. On the menu, select **Inventory > Order List**.

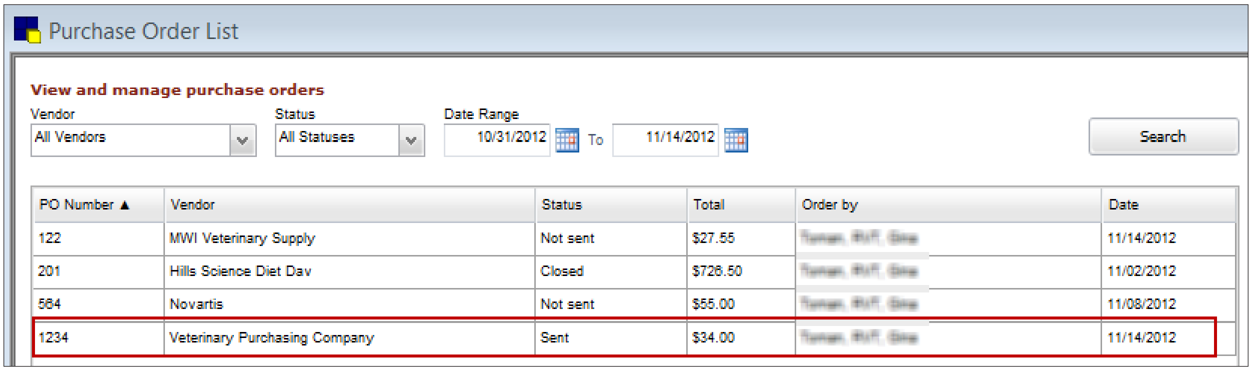
   The Order List displays orders placed within the last two weeks. Change the dates if necessary.
2. Select an order that has a status of **Not sent** or **Sent** (or **Sent-Online** if you used IDEXX SmartOrder*).
3. Click **Edit**.



4. Make any changes to the order by entering the new information. You can update quantity, cost, special price (SP), unit of measure, add items to the order, or remove items from the order.

5. Click **Save** or **Place Order**.

   The Purchase Order List window displays the purchase order with a status of Sent.



6. Close the Purchase Order List window.

Special Purchase Scenarios—Rabies Vaccines, Heartworm, Flea/Tick Prevention

There are times when you will need to purchase items in quantities that are different than your buy/sell ratio. For those types of items, it is recommended to complete the following steps:

1. On the Create/Edit Purchase Order window, select and enter the inventory item.
2. Change the unit of measure to the selling unit of measure.
3. Enter the order quantity, keeping in mind the unit of measure.
4. Enter the item's cost, if available, keeping in mind the unit of measure.

By entering the purchase in this way, you will be able to determine when an item has been ordered and received in the nonstandard quantity.

When receiving the item, you will need to ensure the cost is entered as the selling unit's cost.

Receive

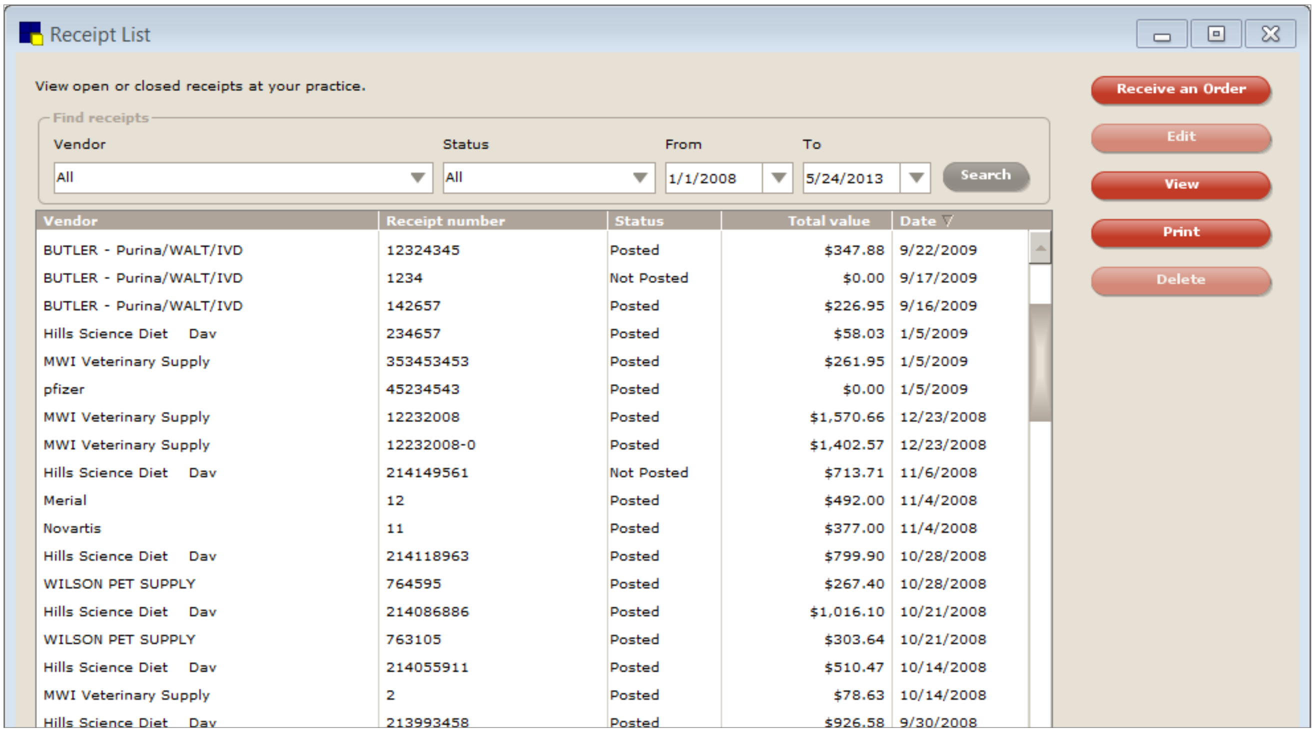
Receipt Management

Receipt List Overview

View a snippet online demonstration

Open the Receipt List window by selecting **Inventory > Receipt List.** The Receipt List window automatically displays received orders entered in the past two weeks and is sorted by date.

tip Sort inventory windows by clicking on any of the column headers. Each logged in user can add, remove, and arrange columns to suit their individual needs.



When looking for a specific received order, enter information in one or more of the criteria fields provided in the **Find receipts** area and click **Search**. Receipts that match the selected criteria display in the Receipt List window.

The following fields are available in the **Find receipts** area:

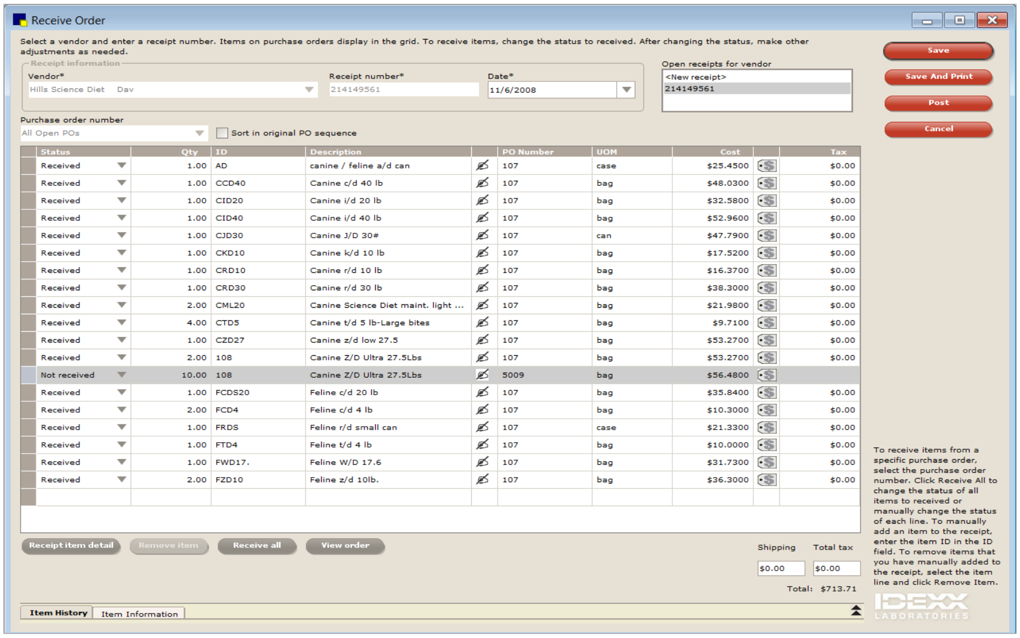
- **Vendor**—View receipts for a specific vendor only.
- **Status**—View receipts with a specific status (**All**, **Posted**, and **Not Posted**).
- **From**—The two weeks prior to the current system date displays in the field. To find receipts on or after a certain date, type a beginning date or click the arrow and select a date from the calendar.
- **To**—The current system date displays in the field. If necessary, type an ending date or select a date from the calendar.

Receive Order Overview

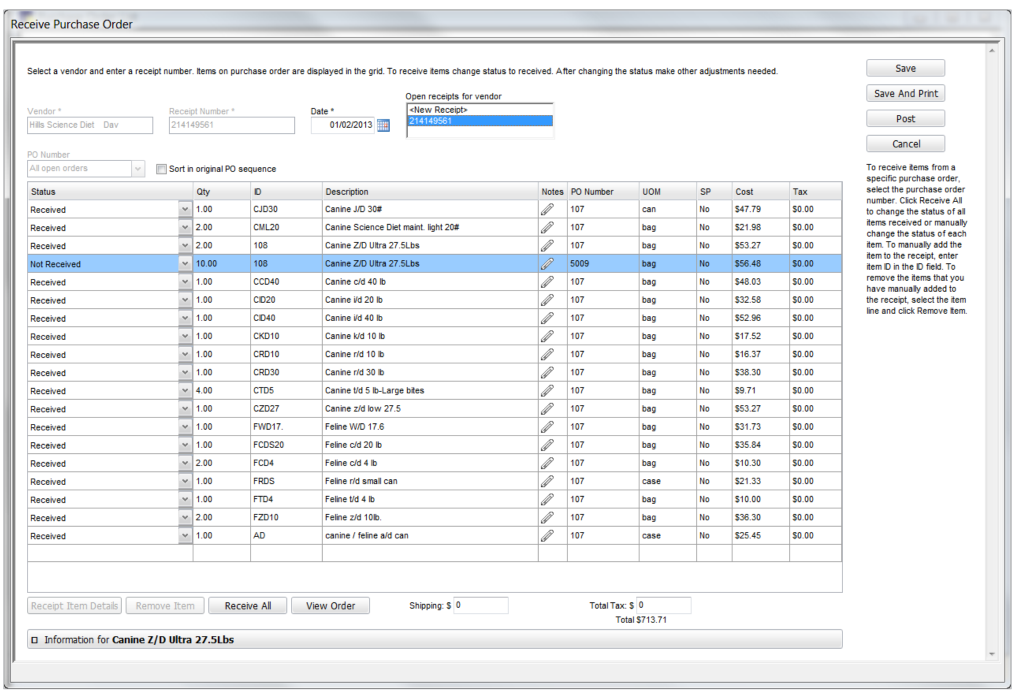
View a snippet online demonstration

For IDEXX SmartOrder* users, an order automatically changes its status to Received once it is received and entered into the Cornerstone software at the practice. For more information, see “Receiving Electronic Inventory Orders” on page 69.

To open the Receive Order window from the Receipt List window, click **Receive an Order**, **Edit**, or **View**.



To open the Receive Order window from the Purchase Order List window, click **Receive Order**.



The Receive Order window includes the following fields:

- **Vendor—**Select the vendor from whom the items are being received.
- **Receipt number**—Enter the invoice or packing slip number provided by the vendor.
- **Date**—This is the date the shipment is received. The current system date will automatically display but can be changed if necessary.
- **Open receipts for vendor**—If you have any open, unfinished receipts for this vendor, they will display here. To finish one of these receipts, select the receipt from the box.
- **Purchase order number**—Select an order to find the items on a specific purchase order.
- **Sort in order PO sequence**—Select this check box to sort in PO sequence.
- **Shipping**—Enter any shipping charges that apply.
- **Total tax**—Enter the total amount of tax that applies to the shipment. If entering tax for the individual items on the receipt, the total for all line items is calculated and displays in the field.
- **Total**—View the total cost of the items on the receipt. This total should match the total provided by the vendor on the invoice or packing slip.

The Receive Order window includes the following columns:

- **Status—**The status of the item on the receipt. Options include **Ordered**, **Received**, **Backordered**, and **Cancelled**.
- **Qty—**The total quantity for the item placed on the purchase order, based on the unit of measure.
- **ID—**The item ID of the product placed on a purchase order.
- **Description**—The name of the item placed on a purchase order.
- **PO Number**—The purchase order number.
- **Note**—A note added to the line item. Click the icon to view the note.
- **UOM**—The buying unit of measure for the item.
- **Cost**—The unit cost of the item.
- **Special Price/SP**—If the item is purchased at a special price, the icon displays. As a result, the item's vendor cost will not update. It will still figure into the average cost.
- **Tax**—The individual tax that applies to the item (if applicable).

You can sort columns by clicking on the column headers, as well as add or remove columns as needed.

In Cornerstone, tracked cost is based on the Cost field only. Even if shipping and taxes have been entered into their respective fields, they do not calculate into the inventory cost on hand or cost of goods sold.

The Receive Order window includes the following buttons:

Receipt item detail is used to enter additional information for an item, including the locations at which the item is being received, lot numbers, and/or expiration dates. Items in red on the Receive Order window require this information be entered. If the information is not entered, the receipt cannot be posted.

Remove item is used to remove a manually added item. In other words, if an item wasn't on the original purchase order, but you now have an item to receive, you would manually add it on the Receive Order window, which creates a manually added item. Select the line to remove and click **Remove Item**.

To remove an item that is listed on the receipt but originated from the purchase order, select **Cancelled** from the **Status** list.

Receive all is used to change the status of all items on the receipt to Received.

View order is used to look at the purchase order for the item. Select the item and click **View order**. The View Purchase Order for [Vendor name] window displays the detailed information for the order. Click **Back** to return to the Receive Order window.

Save is used to save, but not post, the receipt on the Receive Order window. Because the receipt has not been posted at this point, staff can still open the receipt and work on the on it. QOH and cost information are not updated.

Save and Print is used to print a receipt. Click **Save and Print** and the Inventory—Receipt Report window displays the current details of the receipt. Preview, print, or save a copy of the receipt, and then click **Back** to return to the Receive Order window.

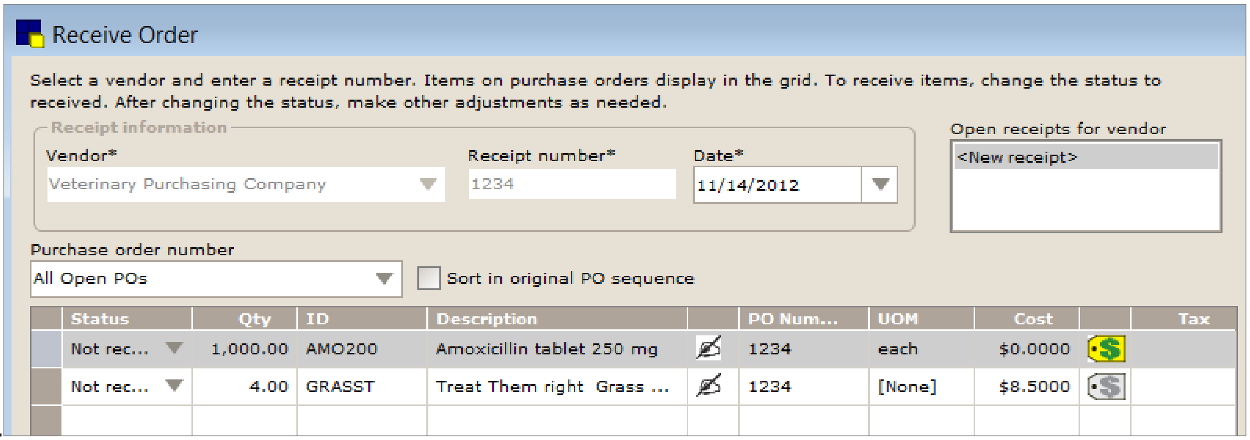
Post is used to process a completed receipt. When you click **Post**, the Change Prices window displays each item being received. Make any necessary changes to the pricing information for the items and click **Post**. QOH and cost information are updated and items are received into the correct locations.

Cancel is used to discontinue a receipt. When you click **Cancel**, if the confirmation window appears, click **Yes**. The Receipt List window opens.

Adding a New Receipt—Receive Order

To create a receipt with multiple items:

1. On the menu, select **Inventory > Receipt List**.
   The Receipt List window displays existing receipts entered in the last two weeks.
2. Click **Receive an Order**. The Receive Order window opens.
3. From the **Vendor** list, select the vendor from which items are being received. If there are open receipts for the vendor, they will display in the **Open receipts for vendor** box.
4. Type the invoice or packing slip number provided by the vendor in the **Receipt number** box and press **Tab**. This number must be unique for the vendor. If the number entered is a duplicate, a message will display.
5. Enter a receipt date in the **Date** box or accept today's date. Items on the purchase order will display in the grid.
6. Click in the **Status** box and select **Received**, **Canceled**, or **Backordered** from the list.
   If further information is required (such as lot number and expiration date) the line will display in red.
   If entering a receipt only (with no associated purchase order), **Canceled** and **Backordered** are not available in the **Status** box.



7. Adjust the receipt information for the items in the Receive Order columns. Change the quantity, UOM, and cost to match your vendor invoice. You will not receive ALL of the items on the original purchase order.
8. Click **Receipt Item Details** to add the details (lot numbers and expiration dates), if needed.
9. Click **Done**. You will return to the Receive Order window. If some items did not arrive in the shipment, they will remain on the order and no details will be filled in
10. Click **Save** or **Post**. The Receipt List window displays the new receipt with a status of Not Posted.

For information about receiving an order using IDEXX SmartOrder*, See "Receiving Electronic Inventory Orders" on page 69.

Saved receipts can be updated or changed, but the items will not be received into inventory. Posted receipts are final and items are then transferred into inventory.

If multiple lot numbers and/or expiration dates were received, copy the line first then add the lot numbers and expiration dates appropriately.

Posting receipts with some items still back ordered or not received changes the status on order list to partial, but does update the quantity on hand for the items received.

Items that appear in black do not require lot number or expiration date information. Items that appear in red DO require lot number and/or expiration date information. Fields that must be filled in contain a red "(?)" in the field. Additional items added to a receipt sourced from a purchase order will also appear in red text.

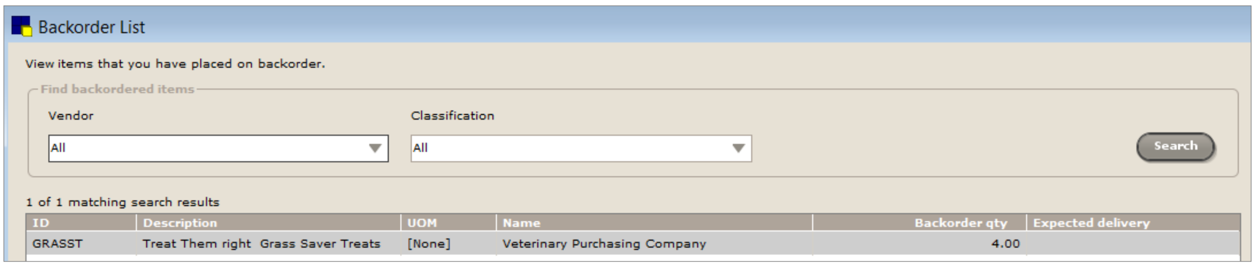
Backorder List Overview

View a snippet online demonstration

This lesson highlights the Backorder List. Back ordering can only be used if purchase orders are entered.

To open the Backorder List, select **Inventory > Backorder List**. Back orders appear on the list if an item placed on a purchase order has a status of back order or if the item is placed on back order when it is received. The quantity of back ordered items on this list may be modified or the back ordered item may be canceled.

To narrow the list of items, enter criteria in any of the fields in the **Find backordered items** area and click **Search**.



Find backordered items area fields include:

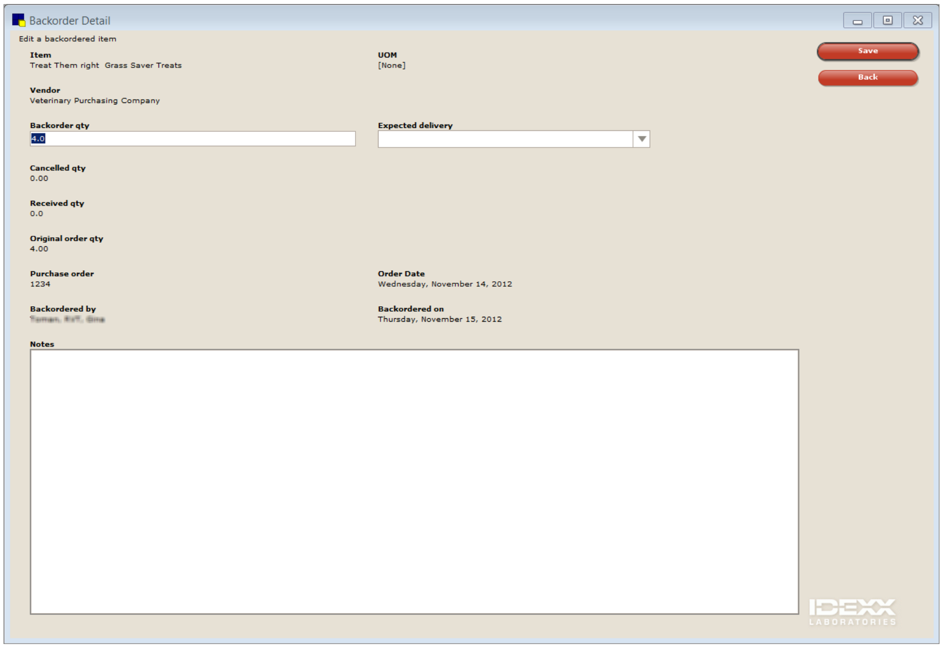
- **Vendor** list: View a list of back orders for a specific vendor.
- **Classification** list: View a list of back orders for a specific classification.

Editing a Back Ordered Item

View a snippet online demonstration

To edit a back ordered item:

1. On the menu, select **Inventory > Backorder List**.
2. Select the back ordered item to edit.
3. Click **Edit Backorder**.
4. Optional: In the **Backorder qty** box, enter a new quantity on backorder. The **Cancelled qty**, **Received qty**, and **Original Order qty** fields are up**dated to reflect the changes.**
5. **Optional: In the** Expected delivery box, type a date or click the arrow to display a calendar and choose a date the item is expected to be delivered.
6. Optional: In the **Notes** box, type (or add) a note pertaining to the back ordered item.
7. Click **Save**.
8. Close the Backorder List window.

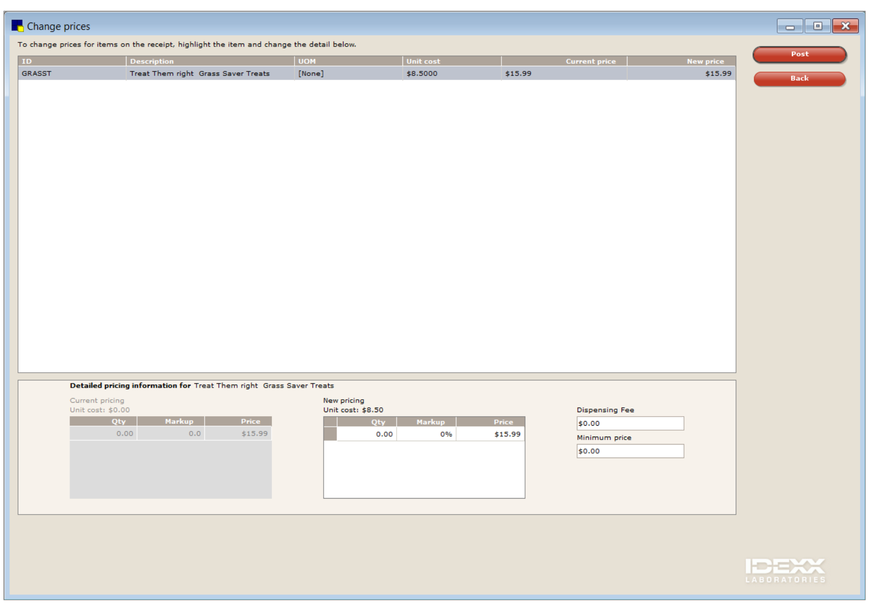


Posting Inventory Receipts

[View a snippet online demonstration]

To post an inventory receipt:

1. On the menu, select **Inventory > Receipt List**.
2. Click **Receive an Order**.
3. Select the vendor and press **Tab**.
4. Select the receipt.
5. Click **Post**. The Change prices window opens.



tip Cornerstone doesn't require you to complete anything on this window, but at a minimum you should review the new pricing to ensure your receipt entry was accurate and is not causing an inaccurate new price.

6. Optional: To change price information, select the item on the **Change prices** list. The current and new pricing information for the item displays in the **Detailed pricing information for [Name of Item]** area.

   The new pricing unit cost equals the cost of the item that appears on the Receive Order window. When receiving an item with more than one unit cost, the highest cost becomes the new unit cost. You may enter new markup information for the item to calculate a new price for the item or enter a new price to calculate the markup of the product.

   Prices will not change if the item isn't set to auto calculate price (**Lists > Invoice Item**) and have a markup percentage or markup dollar amount entered.

7. Optional: Enter a dispensing fee for the item in the **Dispensing Fee** box.
8. Optional: Enter a minimum price for the item in the **Minimum price** box.
9. Click **Post**. The quantity on hand and cost information for each item is updated and the items are received into the correct location. The Receipt List window displays the posted receipt.
10. Close the Receipt List window.

Deplete/Adjust

Depletion, Quantity on Hand, and Cost Adjustments

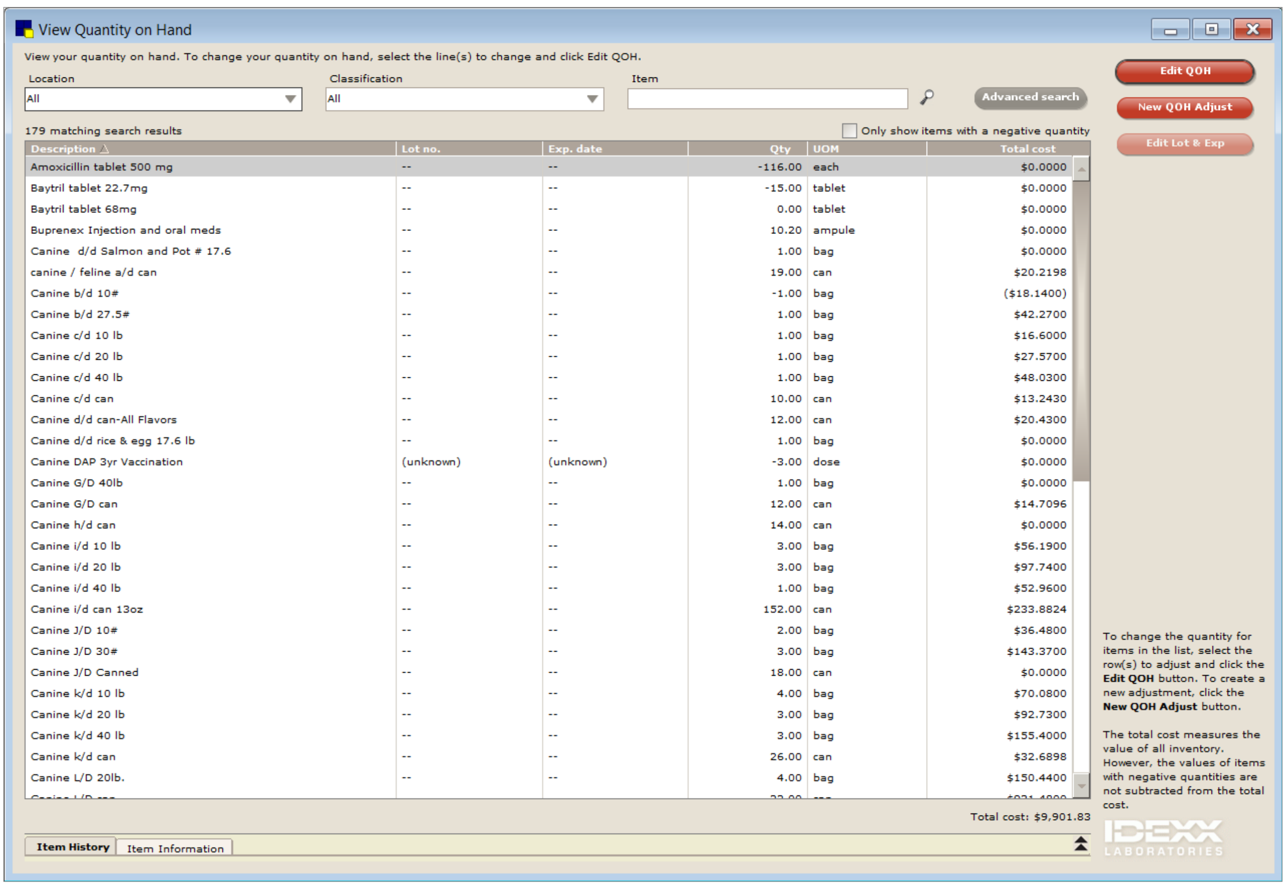
View Quantity on Hand Window

View a snippet online demonstration

To access the View Quantity on Hand window, select **Inventory > View Quantity on Hand**. The View Quantity on Hand window displays all items marked to maintain quantity on hand.

tip Sort inventory windows by clicking on any of the column headers. On most inventory windows, each logged in user can add, remove, and arrange columns to suit their individual needs.

To narrow the list of items, enter criteria in the available fields and click **Search**.



Items with quantity on hand of zero will automatically be removed from this window after 14 days. There is no way to remove those items from the window without turning off quantity on hand tracking. However, call Cornerstone Support at 1-800-283-8386 to have a technician perform a setting modification so that items with a zero QOH will be removed after one day.

When quantity on hand is edited for an item that is tracking expiration date and/or lot numbers, it will create multiple listings in the View Quantity on Hand window.

tip Review this window for negative quantities on hand on any items. Then review its cost. If a cost adjustment is needed, make the adjustment under **Inventory > Adjustment List**.

Edit a Quantity on Hand

View a snippet online demonstration

Quantity on Hand and Expiration Date Adjustments

Adjustments to the quantity on hand (QOH) for an inventory item are generally made due to a physical count of inventory, damaged or expired products, and entry errors.

- **Edit QOH** is used to adjust the existing quantity on hand for an item that appears on the View Quantity on Hand list.
- **New QOH Adjust** is used to adjust the quantity on hand for an item that does not have a QOH listed and does not appear on the View Quantity on Hand list.
- **Edit Lot and Exp** can be used to adjust lot numbers and expiration dates for existing QOH.

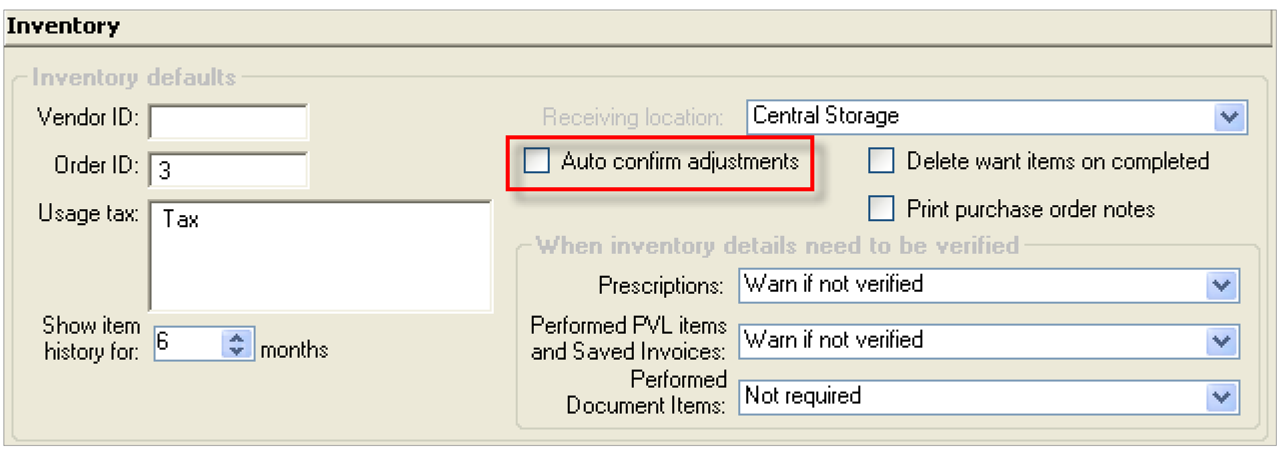
There are two methods to adjust expiration dates found on the View Quantity on Hand window:

- Use the **New QOH Adjust** window.

  When using this method, after the adjustment you will notice two lines on the View Quantity on Hand window. One for the new entry and one with the old expiration date. The old expiration date will disappear from the list in 14 days

- Use the **Edit Lot and Exp** window.

tip If the **Auto confirm adjustments** check box is not marked under **Controls > Defaults > Practice and Workstation > Inventory**, then you will need to confirm the entry under **Inventory > Adjustment List** before it will display on the View Quantity on Hand window.



New QOH Adjust

1. On the menu, select **Inventory > View Quantity on Hand**. The View Quantity on Hand window displays all items marked to display quantity on hand.
2. Click **New QOH Adjust**.
3. In the **Item** box, type the first few letters of the item you are searching for and click **Search**. A list of items that matches the criteria appears.
4. Optional: Select the location of the item to adjust from the **Location** list.
5. If tracking, enter an expiration date for the item in the **Expiration** date box.

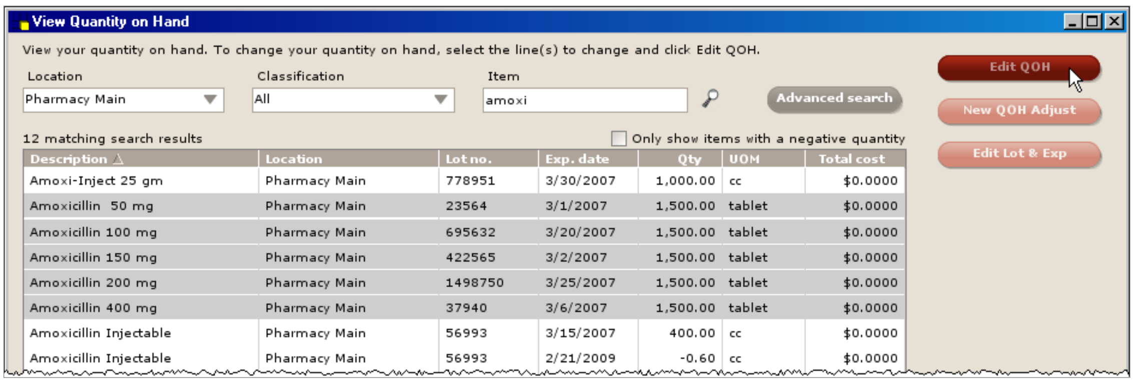
6. If tracking, enter a lot number for the item in the **Lot number** box.
7. Enter the new quantity on hand in the **Actual** box. The **Change** box will show the change in quantity.
8. From the **Adjustment reason** list, select the reason the adjustment was made.
9. Click **Save.**

tip Entering a number in either the **Actual** box or the **Change** box will cause the other box to populate with the quantity modification.

Editing QOH

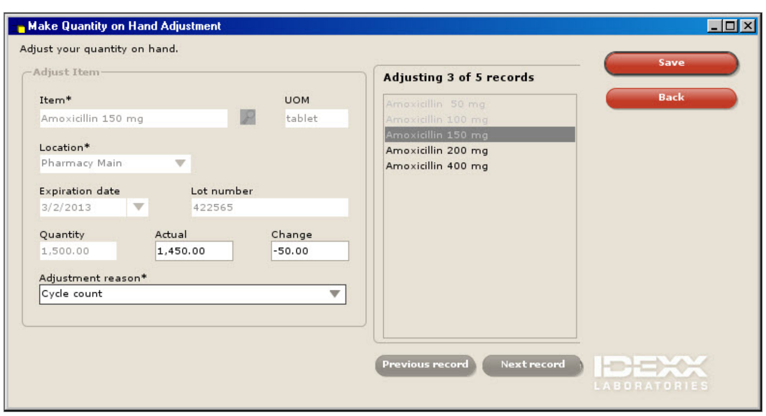
View a snippet online demonstration

1. On the menu, select **Inventory > View Quantity on Hand**. The View Quantity on Hand window displays all items marked to display quantity on hand.



2. Optional: Click **Advanced Search** to enter additional information.
3. Optional: Select the location of the item to adjust from the **Location** list.
4. In the **Item** box, type the first few letters of the item you are searching for and click **Search**. A list of items that matches the criteria appears.
5. Select one or more items to adjust and click **Edit QOH**. To select multiple items from the list, press the CTRL key to select nonconsecutive items and the SHIFT key to select consecutive items.

   The Make Adjustment window displays the items. The first item is selected.



6. Enter the new quantity on hand in the **Actual** box. The **Change** box will show the change in quantity.
7. From the **Adjustment reason** list, select the reason the adjustment was made.
8. Continue making adjustments for each item selected by selecting **Next Record** or **Previous Record**.

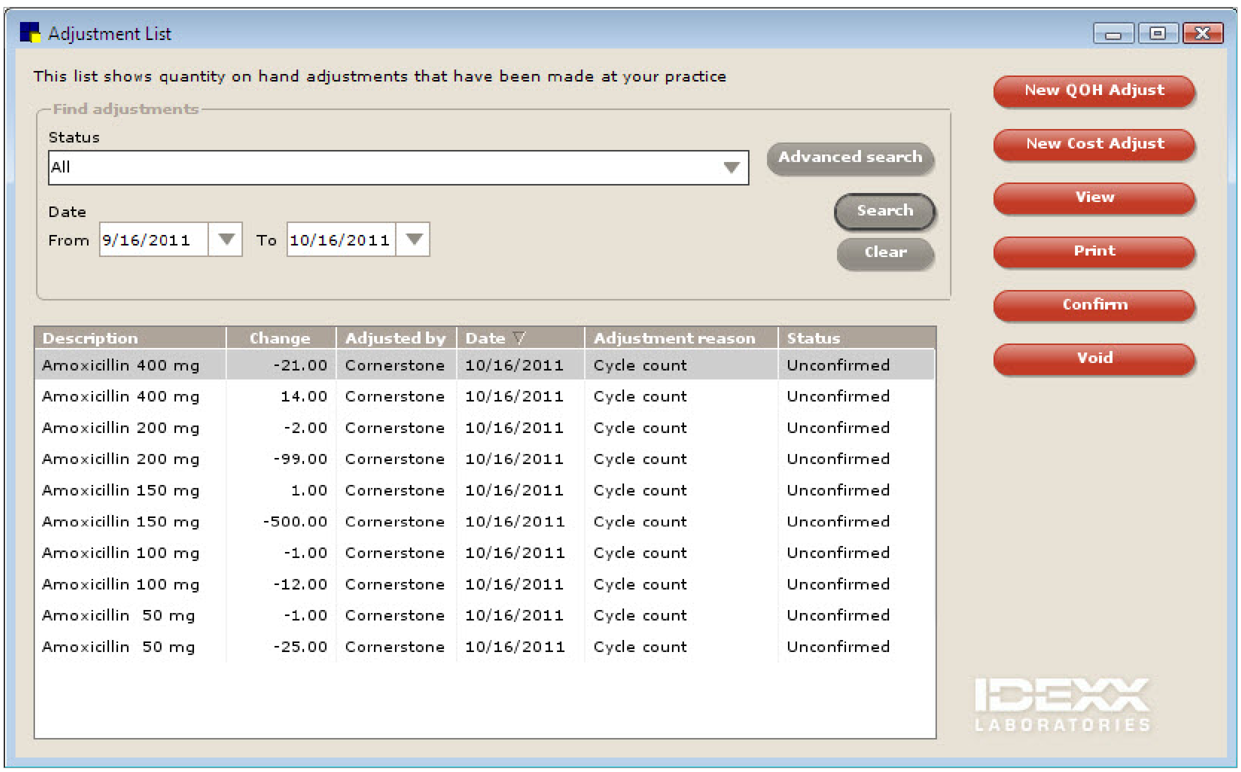
9. Click **Save**.
10. Close the View Quantity on Hand window.

Adjustment List Overview

View a snippet online demonstration

To open the Adjustment List window, select **Inventory > Adjustment List**. The Adjustment List displays all adjustments processed in the View Quantity on Hand window. To narrow the list of items, enter criteria in any of the fields in the **Find adjustments** area while performing a basic or advanced search and click **Search**.

If practice defaults are not set to auto confirm quantity on hand or expiration date adjustments, each adjustment performed by other staff members in the View Quantity on Hand window will display on the Adjustment List with an Unconfirmed status. Unconfirmed adjustments can be confirmed or voided.



Adjust Quantity on Hand from Adjustment List

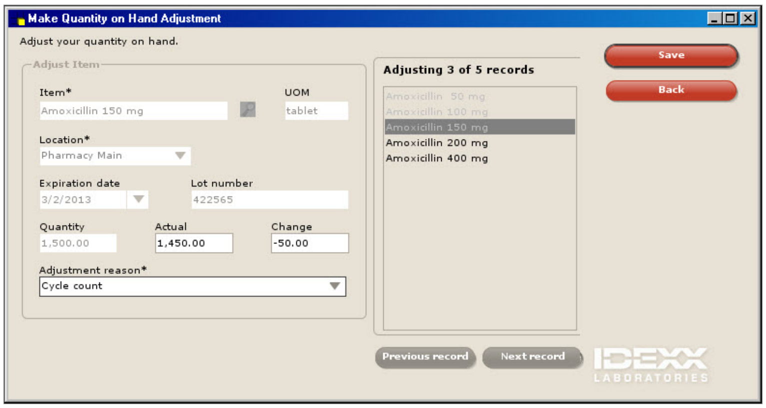
New Quantity on Hand (QOH) Adjustment

View a snippet online demonstration

To adjust the quantity on hand for an inventory item:

1. On the menu, select **Inventory > Adjustment List**. The Adjustment List window opens.
2. Click **New QOH Adjust**. The Make a Quantity on Hand Adjustment window opens.
3. In the **Item** box, double-click or press F2 to search for and select the item that needs a quantity on hand adjustment.

4. If tracking, select or enter the expiration date for the item in the **Expiration date** box.
5. If tracking, select or enter the lot number for the item in the **Lot number** box.
6. Enter the new quantity on hand in the **Actual** box. The adjusted quantity displays in the **Change** box.
7. Select a reason the adjustment was made from the **Adjustment reason** list.
8. Click **Save**.
9. Close the Adjustment List window.



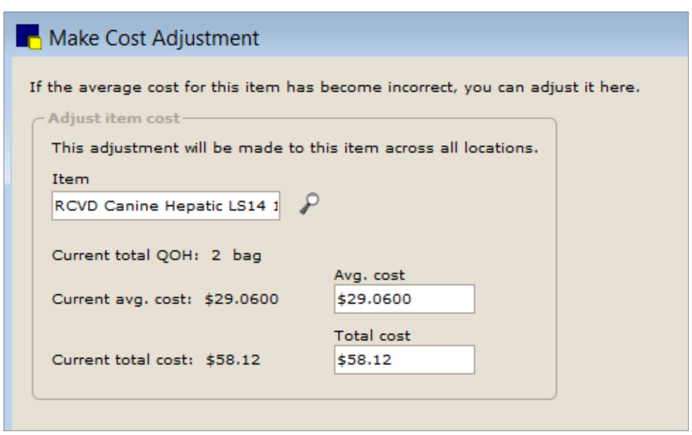
Adjust Vendor Cost of Item

View a snippet online demonstration

Be sure your quantity on hand amounts are correct *before* you make an adjustment.

To adjust the cost of an inventory item:

1. On the menu, select **Inventory > Adjustment List**. The Adjustment List window opens.
2. Click **New Cost Adjust**. The Make Cost Adjustment window opens.



3. Search for and select the inventory item that needs a cost adjustment.
4. In the **Avg. cost** box, enter the average cost of the product. Or, in the **Total cost** box, enter the total cost of the product.

   The total cost is calculated and displays in the **Current total cost** field. As an alternative, you can also enter the total cost to automatically calculate average cost.

5. Click **Save**.

Other Depletion Activities: Patient Visit List, Whiteboard, Invoice, Returns, Internal Use, and Voids

It is important to understand how inventory quantities are depleted from Cornerstone.

- **Patient Visit List**—The Patient Visit List depletes inventory quantities only when the item has been performed and inventory details have been verified.
- **Electronic Whiteboard**—When treatments are completed on the Whiteboard window, inventory items are performed and there is an opportunity to verify inventory details. These charges are transferred to the Patient Visit List.
- **Invoice**—Inventory quantities are depleted on saved and posted invoices when the inventory details are verified.
- **Returns and Internal Use**—When returns and internal use are performed, QOH is updated.
- **Voids**—Inventory is updated when invoices and prescriptions are voided.

Voiding Prescriptions and Invoices

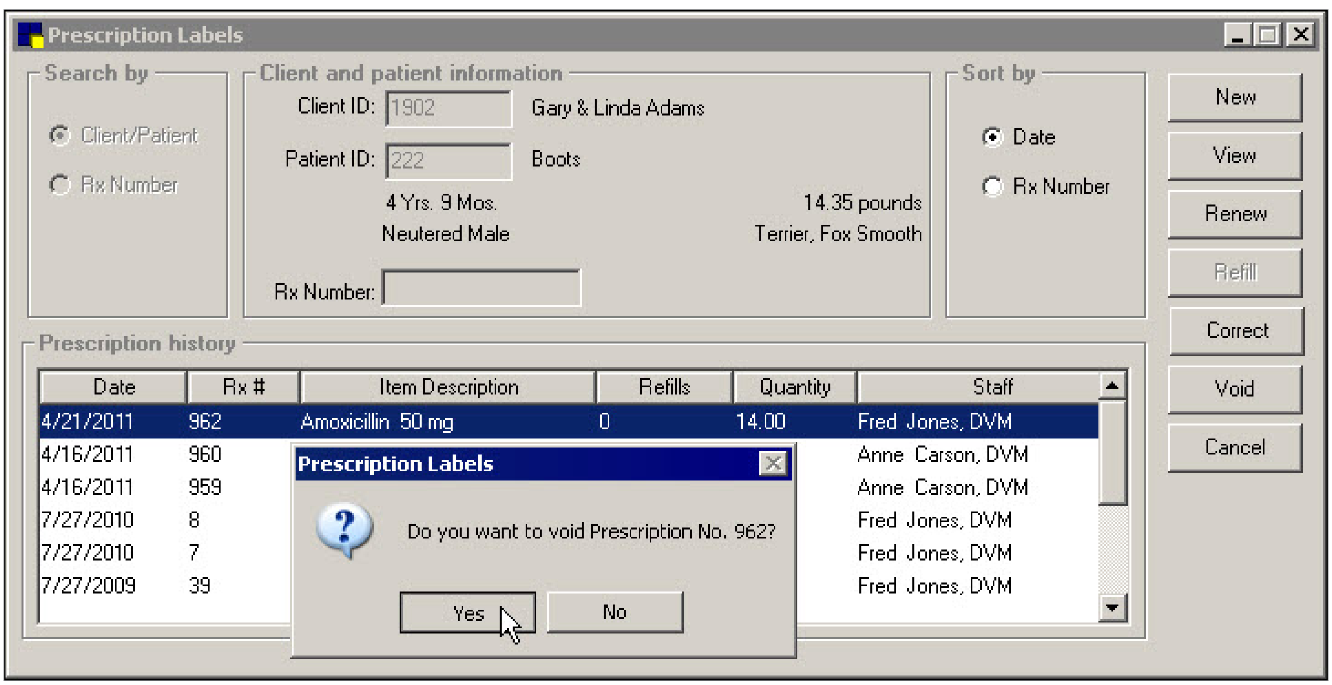
Voiding Prescriptions

Voiding a prescription does three things:

- The prescription is voided and hidden in the patient's medical record (unless the **Hide voided items** check box is cleared).
- The quantity of the items is added back into inventory.
- The charge is deleted from the Patient Visit List.

When you void a prescription after it is transferred from the Patient Visit List to the invoice or after the invoice is posted, the QOH is not updated.

Use this feature when returning prescriptions to the shelf that have not been picked up by your client.

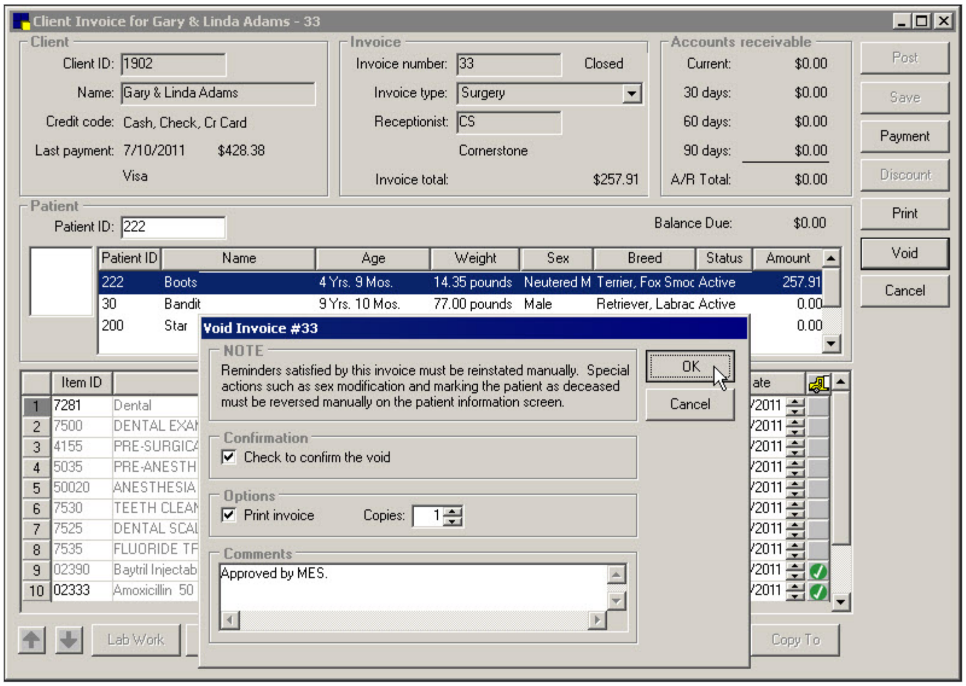


tip When using the Patient Visit List and declining an item to history, using the blue PVL line to record "client did not pick up prescription" is a best practice option for patient record documentation and for returning inventory to stock. Voiding the prescription would be the next step.

Voiding Invoices

Voiding an invoice reverses all charges on the invoice and returns the quantity of the inventory items to inventory stock. If there are payments attached to the invoice, you will be asked if you want to reverse them.

Voiding does not reverse any special actions that were completed (e.g., sex modification, mark as deceased, etc.) or reminders updated during the invoicing process.

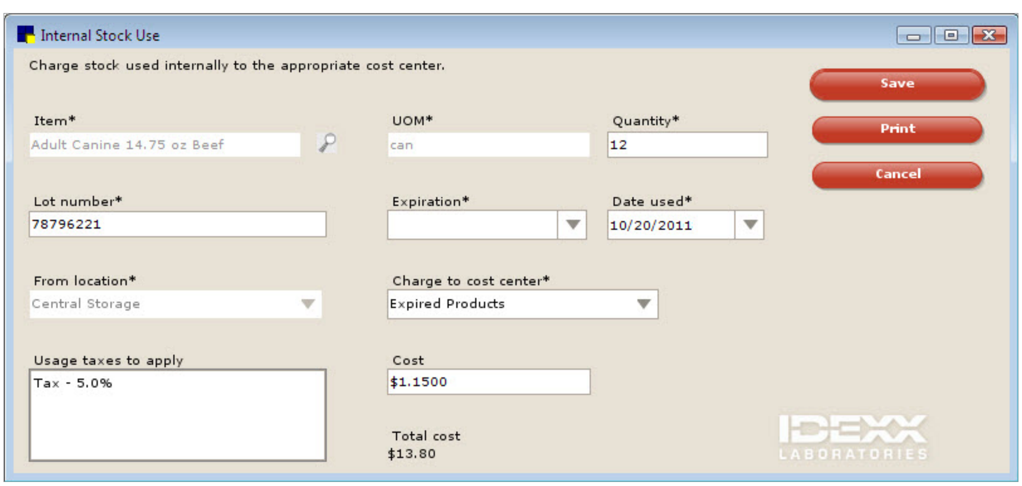


Deplete Internal Stock

[View a snippet online demonstration]

Use the Internal Stock Use window to track the revenue of doing business in the different aspects of the practice. This is used to track the cost of items that are used internally and are not invoiced.

To open the Internal Stock Use window, select **Inventory > Internal Stock Use**.



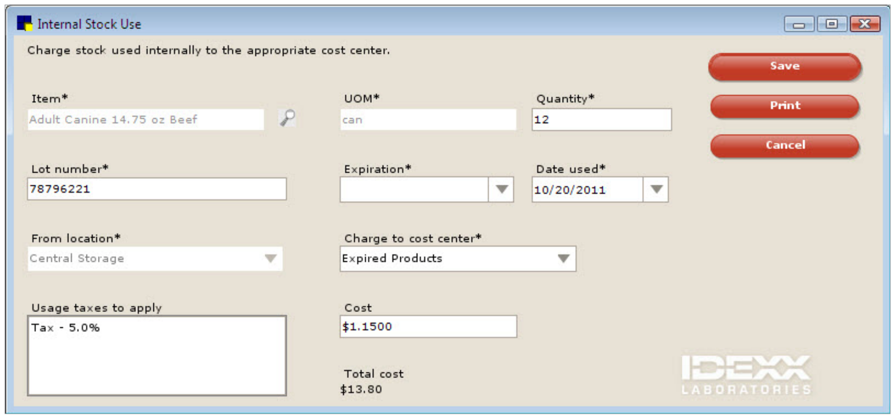
tip Internal stock usage is considered complete when saved. An adjustment is required to reverse it.

To perform an internal stock transaction:

1. On the menu, select **Inventory > Internal Stock Use**.

   This is for internal tracking of QOH items only.

2. In the **Item** box, search for and select the item to deplete.
   The UOM box automatically displays the selling unit of measure for the item. The Cost box displays the average cost of the item if tracking quantity on hand; or the last received cost if the item is not marked to maintain quantity on hand. The Total cost box displays the cost multiplied by the quantity entered.
3. In the **Quantity** box, enter the quantity to remove from stock.



4. In the **Lot number** box, if tracking, enter the lot number of the item being depleted.
5. In the **Expiration** box, if tracking, enter the expiration date of the item being depleted.
6. In the **Date used** box, enter a date the item was removed from inventory. If a date confirmation window displays, select **Yes**.
7. From the **Charge to cost center** list, select the cost center that will be charged for the item.
8. Optional: From the **Usage taxes to apply** list, select the usage taxes that apply to the item.
9. Optional: In the **Cost** box, modify the unit cost.
10. Click **Save** to process the depletion and close the window. To preview or print the report, click **Print**.

Internal Stock Use buttons include:

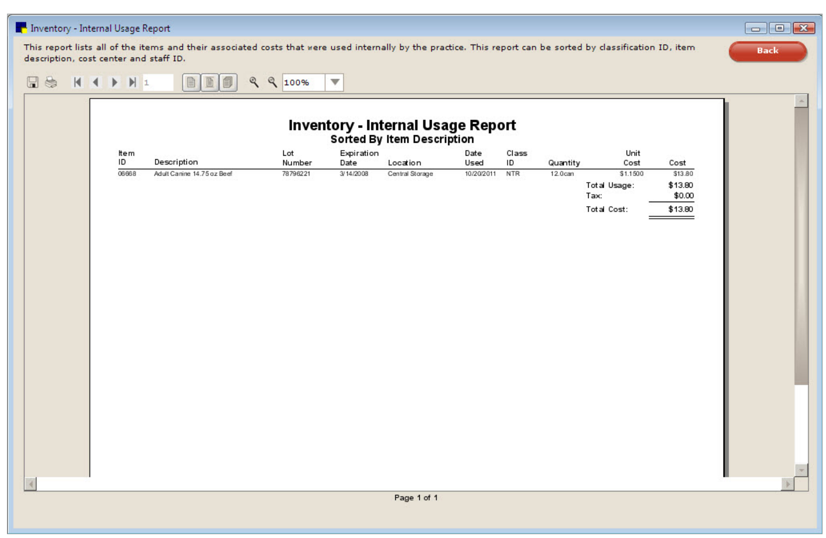
Save is used to process the depletion of stock for items used internally by the practice.

Print is used to access the Inventory—Internal Usage Report. Click **Print**, select sort order and range information, and then decide whether to preview, print, or save the report. Click **Back** until the Internal Stock Use window appears.

Cancel is used to discontinue an internal use of stock depletion.

Internal Usage Report

1. Click **Print** to view the range screen.
2. Click **Preview** to view the report.
3. Click **Back** twice to get back to the Internal Stock Use window.
4. Close the Internal Stock Use window.

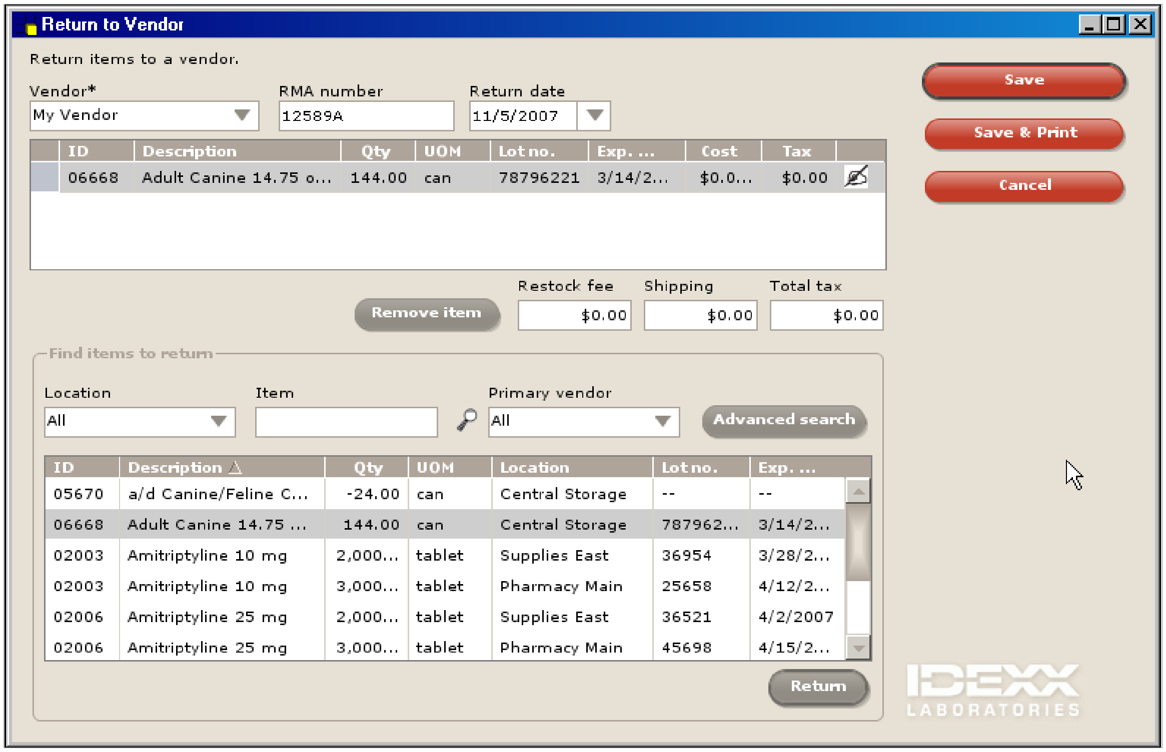


RETURN TO VENDOR

The Return to Vendor window contains several fields, a list of QOH tracking items to be returned to the vendor, and a **Find items to return** area used to search for and select items that need to be added to the list of returns. To access this window select **Inventory > Return to Vendor**.

View a snippet online demonstration

It is only possible to return only those items that are marked to maintain QOH.



To return an item to the vendor:

1. On the menu, select **Inventory > Return to Vendor**.
2. From the **Vendor** list, select the vendor the inventory items will be returned to.
3. Optional: Type the return merchandise authorization (RMA) number provided by the vendor in the **RMA number** box.
4. Optional: Select or enter a return date in the **Return date** box.
5. Search for and select items to return in the **Find items to return** area.
6. Select the items and click **Return**.
7. Optional: Adjust the return information for the items in the **Return to Vendor** columns.

   The UOM is in sell units. Cost entered by the Cornerstone system is the last paid vendor cost.

8. Click **Save**.

IDEXX SmartOrder* Inventory Solution

IDEXX SmartOrder* Electronic Inventory Ordering

IDEXX SmartOrder* electronic inventory ordering in Cornerstone* 8.3 creates a more efficient inventory work flow with real-time online inventory ordering through MWI® Veterinary Supply.

Using the IDEXX SmartOrder connection, orders placed within Cornerstone receive real-time inventory status updates and pricing updates from MWI. Order tracking is provided once MWI has processed an order and as orders are shipped. In addition, Cornerstone automatically recognizes the receipt of the shipment.

Benefits of IDEXX SmartOrder include:

- **Ordering from within your practice management system**—The order process is within your work flow so you do not have to switch among multiple systems to place or track an order.
- **Real-time pricing details**—When you place an order, cost for that item is displayed in the purchase order. In addition, when quantity discount opportunities are available, a notification is visible in the SP (Special Pricing) column of the purchase order.
- **Immediate notification of item availability**—You will know right away if items are on back order.
- **Item status updates**—Orders can be tracked from the time they're placed to the time they arrive at the practice.
- **Automated electronic receipt of items**—As ordered items arrive at the practice, receipts automatically fill with the appropriate information for quick and easy processing.

Setting Up Electronic Inventory Ordering with MWI Veterinary Supply

For IDEXX SmartOrder to connect to the MWI online inventory ordering system, you must complete a one-time setup to specify your account information and agree to the MWI terms of sale. This will allow you to send and receive orders from MWI without needing to log in to their website for each online transaction.

You must have an account set up with mwivet.com to use IDEXX SmartOrder. If you do not have an account set up, contact your MWI representative.

- New MWI customers must contact MWI to set up your account and activate online ordering with mwivet.com. If you do not have an account set up, contact your MWI representative.
- Existing MWI customers can use their current MWI customer number to activate electronic inventory ordering in Cornerstone, but you must also contact MWI to enable online ordering through MWI.

There is a $99 annual service fee for IDEXX SmartOrder; however, this fee will be waived by MWI for any practices that place annual orders totaling $5,000 or more directly through the IDEXX SmartOrder inventory ordering system within Cornerstone. The annual tracking period will begin on the date that you activate IDEXX SmartOrder within Cornerstone.

To use the service, you must:

- Have or establish an account with MWI at mwivet.com.
- Set up electronic inventory ordering in Cornerstone and accept the MWI terms of agreement.
- Have a consistent, high-speed Internet connection and Internet Explorer® 7 or later installed on each workstation.

Login/Password Management Settings

Only an administrator can set up and modify electronic inventory ordering with IDEXX SmartOrder.

1. Select **Lists > Practice**. The Practice List window opens.
2. With your practice name selected, click **Update** (or double-click the practice). The Practice Information window opens.
3. In the **Login/Password Management** area, select **Vendor—MWI Veterinary Supply** from the **Account Information for** list.
4. From the **Associated Cornerstone Vendor** list, select the practice-specific vendor associated with MWI to use for this service.
5. In the **Customer Number** text box, enter your practice's MWI customer number. You can find this information on your mwivet.com account.
6. Select the **Enable Online Ordering** check box.
7. A pop-up window displays the terms and agreement. Review the terms and click **Accept** to activate the service.
8. When you are notified that activation was successful, click **OK**.
9. Click **Test** to verify that you have a working Internet connection and valid login information for accessing the vendor's online ordering system.

   In the Practice Information window, the user acceptance, date/time stamp, and a link to the MWI terms and agreement is displayed when online ordering is enabled.

Linking Item IDs to Vendor Information

You need to link the Cornerstone inventory items you'll order most often to the vendor's ID numbers for those items. The most efficient way to prepare for IDEXX SmartOrder is to link all the inventory items you order frequently from MWI.

The procedure below includes running a report to identify the items you've ordered over a one-year period, and linking these items to vendor IDs.

1. Create a list of the inventory items you use most frequently:
   - If you have been ordering from mwivet.com:
     a. Go to mwivet.com, click **Enter Store**, and log in to your account.
     b. From the **PRODUCT** menu, select **purchase product history**.
     c. To sort the list, click the column header for **12 Mo Sales** or **Tot**, pause, and click the header again.
     d. To export the list in the respective file format, click the **Excel®** icon or the **Acrobat®** icon.

   OR

   - In Cornerstone, run one or both of the following reports.
     - **Inventory—Purchase History Report**, which shows what you have purchased for a specific period:
       a. Sort by item description.
       b. Set the report range by date, and select the beginning period and ending period to cover a year.
       c. Click **Preview**.
       d. Save the report as a .csv file.
       e. Open the file in a spreadsheet program like Microsoft Excel, and filter and sort by vendor.
     - **Inventory—Receipt Report**, which shows vendor and purchase history for a specific period:
       a. Sort by vendor.
       b. Set the report range by date, and select beginning period and ending period to cover a year.

   c. Click **Preview**.
   d. Save the report as a .csv file.
   e. Open the file in a spreadsheet program like Microsoft Excel, and filter and sort by vendor.
2. On the menu, select **Lists > Invoice Item**.
3. To limit the list to inventory items, in the **Include** area, select **Inventory items** and clear all the other check boxes.

   OR

   To search for a specific item, select **Description** or **Item ID** in the **Search by** area, and complete the corresponding box in the **Invoice item information** area.
4. For each item that you want to link:
   a. Select the inventory item and click **Update**.
   b. On the **Inventory** tab, click **Item Vendor**.
   c. Fill in the **Vendor ID** box. If you don't know the ID, double-click or press F2 to select from a list.

      Make sure that there's a green check mark in the **Primary** field for this item line to indicate that this vendor will be the default for this item when you add it to the Purchasing Work List.

   d. Scroll horizontally to access the **Vendor item ID** field and enter the MWI SKU number for the item.

      If you created a Purchase Product History report from mwivet.com, you'll see this information in the SKU column. If you don't know the SKU number, consult mwivet.com or call your MWI representative.

   e. Click **OK** to close the Item Vendor Information window.
   f. On the Invoice Item Information window, make sure that the buy/sell ratio is appropriate for the buy unit of measure supplied by MWI.
   g. Click **OK** to close the Invoice Item Information window.
5. Repeat step 3 until you've linked all the invoice items on your list, and then click **Close** on the Invoice Item List window.
6. If you want to view a summary of your progress, run the Inventory—Item Vendor Information Report and filter the report to see only items where the vendor is MWI. This report shows each item you have set up with MWI and if you have linked the item to an MWI vendor item ID.

   For this report to run correctly, vendor contact information must be filled in on the Vendor Information window. To make sure this information has been set up, select **Inventory > Vendors** from the menu. Then, select the line for MWI and click **Edit**. If you make any changes, click **Save**.

Adding Vendor Item IDs for Matching Inventory Items

When adding items to a purchase order, if an invoice item is not recognized by MWI or if the invoice item does not have an associated MWI vendor item ID in Cornerstone, the invoice item line will display with a yellow background and an alert message box appears.

At this point, you may either remove the item from the order or double-click the item's description to open the Suggested Item List window and select a suggested MWI item ID match for the item.

On the Suggested Item List window, Cornerstone automatically populates the **Description** field with the invoice item's description in Cornerstone. Click **Search** to find any closely matching MWI item descriptions. If you are unable to locate a matching item, you can refine search terms or change the description to one or more words that may be recognizable and click **Search** again. If you select the MWI item as a match, the MWI vendor item ID is automatically applied to the Cornerstone item. This item will now be available for online ordering from Cornerstone in the future.

If you make a mistake mapping your item ID to the MWI item ID, you will not be able to reassign that MWI vendor item ID. To remove the incorrect mapping, select **Lists > Invoice Item** and search for the item. Click **Update**. On the Inventory tab, click **Item Vendor** and delete the vendor item ID on the grid.

Assigning Multiple Vendor Item IDs to a Single Inventory Item ID

You can set up multiple vendor item IDs for a single product as long as you use the same buy/sell ratio for each vendor item ID.

For example, you might have more than one vendor for amoxicillin 50 mg capsules. With both vendors, you buy in bottles of 50 capsules but sell individually. In this case, you could set up a vendor item ID for each vendor and link both vendor item IDs to the same inventory item ID.

	Buy	Sell	Example Inventory Item ID	Example Vendor Item ID
Vendor A	Bottle of 50	Single tablet	1001	204
Vendor B	Bottle of 50	Single tablet	1001	573

Adding a Vendor Item ID While Working with Inventory Orders

You can add a new invoice item when searching for an item on the enhanced Search for Inventory Item window available (see “Inventory Item Search Overview” on page 35). The enhanced Search for Inventory Item window includes Vendor and Vendor Item ID fields that provide a quick way to add the primary vendor/vendor item ID information for the item.

Occasionally, a vendor may change the ID number it uses for an item. When this happens, the item will be highlighted, and you should use the above process to link the item to a current vendor ID number.

tip Identify your frequently ordered items and link them to MWI invoice item IDs.

Tracking Electronic Order Statuses from Cornerstone

Order tracking features for electronic inventory orders allow you to:

- See when the status of an ordered item changes, indicating if the order was sent, if the vendor received the order successfully, etc.
  - If the order is received successfully by MWI, the status is **Sent—Online**.
  - If the order is not received by MWI, you will see a message asking you to complete the order offline, and the status is **Sent**. If this happens, you need to use another method to send the order, such as sending the order by fax or calling MWI.
- Track individual invoice items in the order by clicking the **Track** link. This link launches the associated website (USPS, UPS®, or FedEx®) to access tracking details. The link appears on the purchase order once MWI has completed processing and shipped the item.
- After submitting your order, you will receive a confirmation notice informing you that your order has been placed with your practice’s associated vendor for MWI, along with a confirmation number for use in the event you have to contact MWI. Write this number down for reference purposes, as it will not be available after the order is submitted.

Synchronization of Electronic Inventory Orders with MWI

If you are set up to use IDEXX SmartOrder with MWI online inventory ordering, Cornerstone checks MWI online orders to detect unmatched orders.

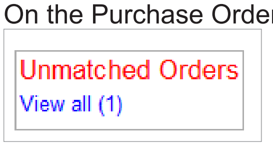
Unmatched orders are orders that were placed with MWI without using Cornerstone—for example, orders placed by phone or fax or by going directly to mwivet.com. When an MWI order does not match a purchase order in Cornerstone, the order does not appear in the table on the Purchase Order List window. However, you can view these orders in the Unmatched Orders area on the right of the Purchase Order List window, and use the following procedure to create matching purchase orders for them.

If the order was placed outside of Cornerstone, Cornerstone tracks it as an unmatched order. We recommend reconciling unmatched orders so that you can use them within the IDEXX SmartOrder work flow.

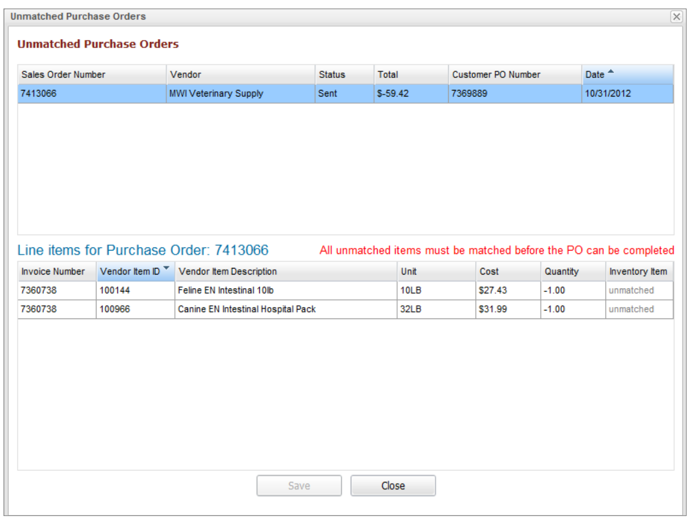
Reconciling orders you place outside of Cornerstone (unmatched orders)

We recommend that you reconcile the unmatched order—this creates a Cornerstone purchase order that you can receive against and post.

1. On the Purchase Order List window, click the **View all** link to open the Unmatched Purchase Orders window.



2. Select an order in the top grid. The invoice items on that order appear in the bottom grid.



3. Ensure all invoice items are linked to Cornerstone inventory item IDs (all items must be linked to reconcile and create the order). If all items are linked, go to step 5.
4. For any invoice item that does not have a Cornerstone inventory item ID associated with it, double-click the inventory line and do one of the following:
   - If you know the item ID, type the ID in the **Inventory Item** field.
   - If you don't know the item ID:
     a. Double-click the **Inventory Item** field.
     b. On the Search for Inventory Item window, type a description in the **Description** box. Possible item matches appear in the table below.
     c. Optional. If you need to add the item to your Cornerstone system, click Add an item at the bottom of the

window. Complete all information but leave the **Vendor** and **Vendor ID** boxes blank. Then, click **Save**.

d. Select the item in the table and click **Select**. The Search for Inventory Item window closes.

5. On the Unmatched Purchase Orders window, press TAB in the **Inventory Item** box to save the ID.
6. When you have matched all line items to Cornerstone inventory items, click **Save**. The Unmatched Purchase Orders window closes, and the purchase order appears on the Purchase Order List window.

   You can receive against this order and then post it, just like any other purchase order.

If you start a purchase order in Cornerstone but are unable to complete that order through IDEXX SmartOrder, and then you create a separate order for the same items outside of Cornerstone, you now have two purchase orders. You have two options:

- Reconcile the unmatched order so that you can receive against it, and delete the original Cornerstone purchase order (on the Purchase Order List window). In most cases, this is the preferred option, because the unmatched order reflects the items that were actually ordered.
- Use the original Cornerstone purchase order to receive against and post. If you typically reconcile unmatched orders, delete the unmatched order (on the Unmatched Purchase Orders window) because it is now a duplicate.

Synchronize an Order Started in Cornerstone but Completed Offline

tip The original purchase order has a lower purchase order number than the purchase order you just created through the synchronization process.

1. Click the **View all** link on the Unmatched Purchase Orders window.
2. If you know that the order listed is a duplicate, select it and click **Delete** to use the original purchase order.

   The original purchase order has a lower purchase order number.

   OR

   If you decide to synchronize the unmatched order, follow the instructions in the previous section.

   You must close the original purchase order in the Purchase Order List after you have synchronized the new unmatched order. To close an order, on the Purchase Order List, select the purchase order that was originally created for this order and click **Close Order**. The status changes to Closed. Then, click **Delete** to remove the original order from the Purchase Order List.

Receiving Electronic Inventory Orders

To receive an order:

1. On the menu, select **Inventory > Order List**. The Purchase Order List window opens.
2. Select the purchase order and click **Receive Order**.
3. Type the receipt number for your order in the **Receipt Number** box. The item list displays.
4. Review the order for completeness and update the status by either clicking **Receive All** or by selecting **Received** from the **Status** list for each item.
5. Missing order information (e.g., lot number) is in red text. You must update this information before you can post the order. Click **Receipt Item Details** to fill in the remaining fields.
6. Click **Post**.
7. In the Change Prices window, make any final adjustments and view the current and new pricing, if applicable.
8. When finished making any changes, click **Post**.

Inventory Reports

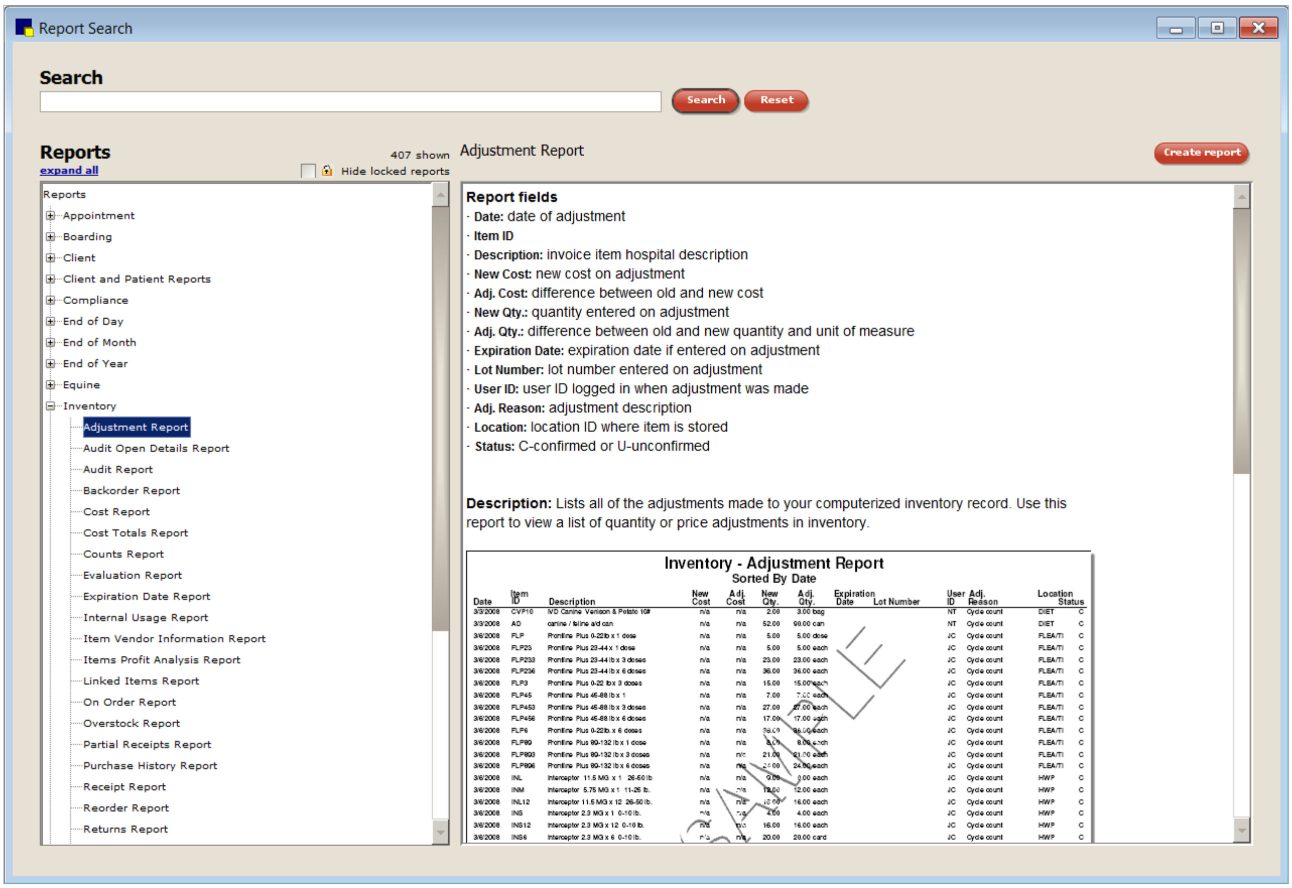
Printing Reports

Printing Reports Overview

[View a snippet online demonstration]

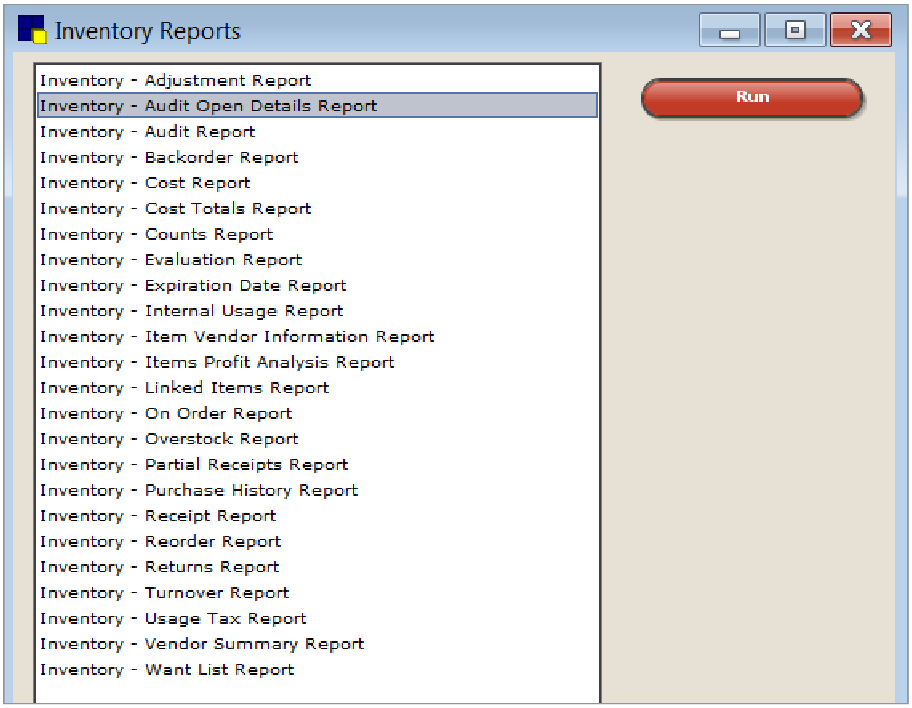
You can sort, filter, and then preview, print, or save inventory reports.

To open the Report Search window for inventory reports, select **Reports > Search for a Report > Inventory** or select **Reports > Inventory**.



In addition to the Inventory reports, an important report is the **End of Month > Cost of Goods Sold Report.**

Select the report to view a sample of the report and see a list of the report details. Click **Create report** to run the report.



Report buttons include:

Preview is used to view a report before printing or saving it.

Print Now is used to print the report immediately to the default printer.

Print is used when you want to choose which printer the report will print to.

Back is used to return to the Inventory Reports window.

Remove Range is used to clear the range information in the **Set report range** area of the window.

To preview an inventory report:

1. On the menu, select **Reports > Inventory**. The available reports are listed.
2. Select a report.
3. Click **Create Report**.
4. Click **Run**.
5. Optional: Click **Preview** to view the standard report or select an option from the **Sort by** list to narrow the results.
6. Optional: Specify the information displayed on the report by selecting range information in the **Set report range** area of the window.

- **Description** list: Select the information to display on the report.
- **Starting value**: Enter a starting value by which to narrow the report results. Press F2 to select from a list of options.
- **Ending value**: Enter an ending value by which to narrow the report results. Press F2 to select from a list of options.
- **And/Or** list: If the report is to include more than one search criteria, select **And** to include all the description ranges entered or select **Or** to include any of the description ranges entered.

tip Click **Remove Range** if the information entered within the **Set report range** area of the window is inaccurate. This will clear the fields.

7. Preview or print the report.
8. Click **Back** until you return to the Inventory Reports window.
9. Close the Inventory Reports window.

tip Reports can be saved as a .csv file then opened in a spreadsheet.

Creating Inventory Reports

[View a snippet online demonstration]

There are many useful inventory report available in the IDEXX Cornerstone* Practice Management System.

Report Title: Inventory—Adjustment Report

Report Description

The Adjustment Report lists all of the adjustments made to your computerized inventory record. Use this report to view a list of quantity or price adjustments in inventory.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

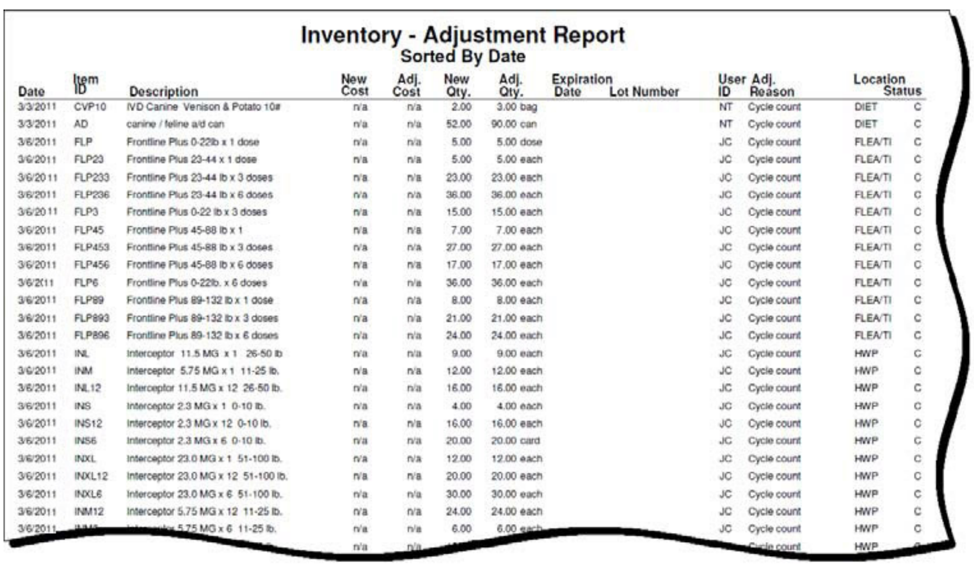
Sort Order	Range
• Date	• Adjustment Reason
• Item Description	• Date
	• Item Description

Report Fields

- Date: Date of adjustment.
- Item ID: The unique identifier for each invoice item.
- Description: Invoice Item hospital description.
- New Cost: New cost on adjustment.
- Adj. Cost: Difference between old and new cost.
- New Qty: Quantity entered on adjustment.
- Adj. Qty.: Difference between old and new quantity and unit of measure.
- Expiration Date: Expiration date if entered on adjustment.
- Lot Number: Lot number entered on adjustment.
- User ID: User ID logged in when adjustment was made.
- Adj. Reason: Adjustment description.
- Location: Location ID where item is stored.
- Status: C-confirmed or U-unconfirmed.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Adjustment Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Adjustment Report**.
5. Click **Run**.
6. On the Inventory—Adjustment Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.



Inventory - Adjustment Report
Sorted By Date

Date	Item ID	Description	New Cost	Adj. Cost	New Qty.	Adj. Qty.	Expiration Date	Lot Number	User ID	Adj. Reason	Location	Status
3/3/2011	CVP10	IVD Canine Venison & Potato 10#	n/a	n/a	2.00	3.00 bag			NT	Cycle count	DIET	C
3/3/2011	AD	canine / feline a/d can	n/a	n/a	52.00	90.00 can			NT	Cycle count	DIET	C
3/6/2011	FLP	Frontline Plus 0-22lb x 1 dose	n/a	n/a	5.00	5.00 dose			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP23	Frontline Plus 23-44 x 1 dose	n/a	n/a	5.00	5.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP233	Frontline Plus 23-44 lb x 3 doses	n/a	n/a	23.00	23.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP236	Frontline Plus 23-44 lb x 6 doses	n/a	n/a	36.00	36.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP3	Frontline Plus 0-22 lb x 3 doses	n/a	n/a	15.00	15.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP45	Frontline Plus 45-88 lb x 1	n/a	n/a	7.00	7.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP453	Frontline Plus 45-88 lb x 3 doses	n/a	n/a	27.00	27.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP456	Frontline Plus 45-88 lb x 6 doses	n/a	n/a	17.00	17.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP6	Frontline Plus 0-22lb. x 6 doses	n/a	n/a	36.00	36.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP89	Frontline Plus 89-132 lb x 1 dose	n/a	n/a	8.00	8.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP893	Frontline Plus 89-132 lb x 3 doses	n/a	n/a	21.00	21.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	FLP896	Frontline Plus 89-132 lb x 6 doses	n/a	n/a	24.00	24.00 each			JC	Cycle count	FLEA/TI	C
3/6/2011	INL	Interceptor 11.5 MG x 1 26-50 lb	n/a	n/a	9.00	9.00 each			JC	Cycle count	HWP	C
3/6/2011	INM	Interceptor 5.75 MG x 1 11-25 lb.	n/a	n/a	12.00	12.00 each			JC	Cycle count	HWP	C
3/6/2011	INL12	Interceptor 11.5 MG x 12 26-50 lb.	n/a	n/a	16.00	16.00 each			JC	Cycle count	HWP	C
3/6/2011	INS	Interceptor 2.3 MG x 1 0-10 lb.	n/a	n/a	4.00	4.00 each			JC	Cycle count	HWP	C
3/6/2011	INS12	Interceptor 2.3 MG x 12 0-10 lb.	n/a	n/a	16.00	16.00 each			JC	Cycle count	HWP	C
3/6/2011	INS6	Interceptor 2.3 MG x 6 0-10 lb.	n/a	n/a	20.00	20.00 card			JC	Cycle count	HWP	C
3/6/2011	INXL	Interceptor 23.0 MG x 1 51-100 lb.	n/a	n/a	12.00	12.00 each			JC	Cycle count	HWP	C
3/6/2011	INXL12	Interceptor 23.0 MG x 12 51-100 lb.	n/a	n/a	20.00	20.00 each			JC	Cycle count	HWP	C
3/6/2011	INXL6	Interceptor 23.0 MG x 6 51-100 lb.	n/a	n/a	30.00	30.00 each			JC	Cycle count	HWP	C
3/6/2011	INM12	Interceptor 5.75 MG x 12 11-25 lb.	n/a	n/a	24.00	24.00 each			JC	Cycle count	HWP	C
3/6/2011	[illegible]	[illegible] 5.75 MG x 6 11-25 lb.	n/a	n/a	6.00	6.00 each			JC	Cycle count	HWP	C
[illegible]	[illegible]	[illegible]	n/a	n/a	[illegible]	[illegible]			[illegible]	Cycle count	HWP	[illegible]

Report Title: Inventory—Audit Report

Report Description

The Audit Report is used as a reference when rekeying data if your system fails. IDEXX recommends using a filter when printing this report.

Lot numbers invoiced to patients and invoicing of linked items appear on this report.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

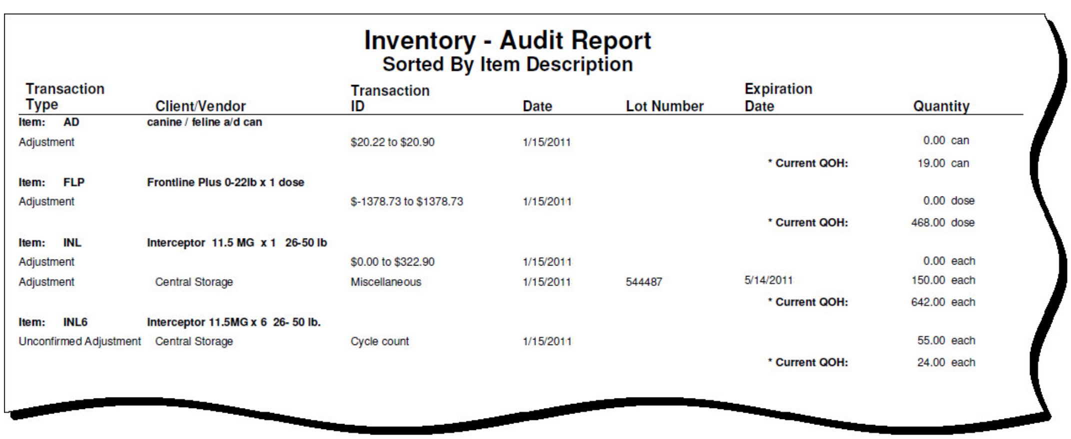
Sort Order	Range
• Item Description	• Date Range • Item Description • Item ID

Report Fields

- Item: Inventory item ID and hospital description.
- Transaction Type: Invoice, open invoice, adjustment, return and vendor, receipt and vendor, and internal usage and cost center.
- Client/Vendor: Vendor ID, Vendor name, and client last name.
- Transaction ID: Invoice number, receipt number.
- Date: Transaction date and time.
- Lot Number: Items lot number.
- Expiration Date: Item's expiration date.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Audit Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Audit Report**.
5. Click **Run**.
6. On the Inventory—Audit Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.



Inventory - Audit Report
Sorted By Item Description

Transaction Type	Client/Vendor	Transaction ID	Date	Lot Number	Expiration Date	Quantity
Item: AD	**canine / feline a/d can**					
Adjustment		$20.22 to $20.90	1/15/2011			0.00 can
					*** Current QOH:**	19.00 can
Item: FLP	**Frontline Plus 0-22lb x 1 dose**					
Adjustment		$-1378.73 to $1378.73	1/15/2011			0.00 dose
					*** Current QOH:**	468.00 dose
Item: INL	**Interceptor 11.5 MG x 1 26-50 lb**					
Adjustment		$0.00 to $322.90	1/15/2011			0.00 each
Adjustment	Central Storage	Miscellaneous	1/15/2011	544487	5/14/2011	150.00 each
					*** Current QOH:**	642.00 each
Item: INL6	**Interceptor 11.5MG x 6 26- 50 lb.**					
Unconfirmed Adjustment	Central Storage	Cycle count	1/15/2011			55.00 each
					*** Current QOH:**	24.00 each

Report Title: Inventory—Audit Open Details Report

Report Description

The Audit Open Details Report provides an itemized trail of items that have been marked as performed on the Patient Visit List but have not been posted on an invoice.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description	• Item Description • Item ID

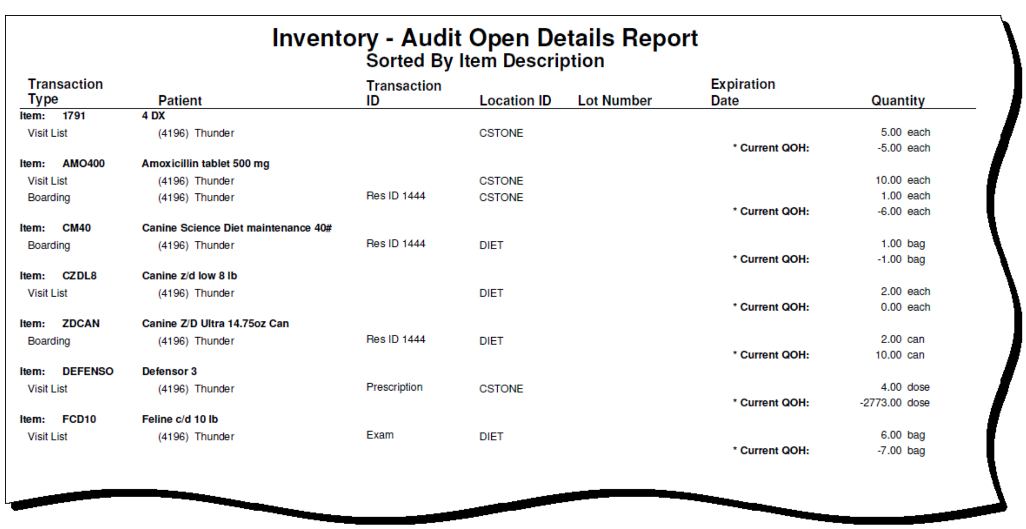
Report Fields

- Item: Inventory item ID and hospital description.
- Transaction Type: Visit list, boarding, open invoice.
- Patient: ID and name of patient.
- Transaction ID: Reservation ID, prescription, exam, or blank or PVL lines.
- Location ID: Items storage location ID.
- Lot Number: Items lot number.
- Expiration Date: Inventory items expiration date.
- Quantity: Quantity of the item involved in the transaction and unit of measure.
- Current QOH: Inventory items current quantity on hand.

tip Transaction types include performed invoice items on the Patient Visit List, boarding invoice items, boarding instruction items, and Patient Advisor exam items. To be included on the report, all items must have inventory details (location, expiration and/or lot number) included and verified.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Audit Open Details Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Audit Open Details Report**.
5. Click **Run**.
6. On the Inventory—Audit Open Details Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.


Inventory - Audit Open Details Report
Sorted By Item Description

Transaction Type	Patient	Transaction ID	Location ID	Lot Number	Expiration Date	Quantity
Item: 1791	**4 DX**					
Visit List	(4196) Thunder		CSTONE			5.00 each
					*** Current QOH:**	-5.00 each
Item: AMO400	**Amoxicillin tablet 500 mg**					
Visit List	(4196) Thunder		CSTONE			10.00 each
Boarding	(4196) Thunder	Res ID 1444	CSTONE			1.00 each
					*** Current QOH:**	-6.00 each
Item: CM40	**Canine Science Diet maintenance 40#**					
Boarding	(4196) Thunder	Res ID 1444	DIET			1.00 bag
					*** Current QOH:**	-1.00 bag
Item: CZDL8	**Canine z/d low 8 lb**					
Visit List	(4196) Thunder		DIET			2.00 each
					*** Current QOH:**	0.00 each
Item: ZDCAN	**Canine Z/D Ultra 14.75oz Can**					
Boarding	(4196) Thunder	Res ID 1444	DIET			2.00 can
					*** Current QOH:**	10.00 can
Item: DEFENSO	**Defensor 3**					
Visit List	(4196) Thunder	Prescription	CSTONE			4.00 dose
					*** Current QOH:**	-2773.00 dose
Item: FCD10	**Feline c/d 10 lb**					
Visit List	(4196) Thunder	Exam	DIET			6.00 bag
					*** Current QOH:**	-7.00 bag

Report Title: Inventory—Backorder Report

Report Description

The Adjustment Report shows all items on back order for your practice.

Sort Order and Range

Sort Order	Range
• Item Description • Vendor Name	• If sort order is by Item Description: Item Description, Item ID, Vendor Name • If sort order is by Vendor Name: Item Description, Item ID, Vendor Name

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: Invoice item hospital description.
- PO Number: Order ID.
- UOM: Order unit of measure.
- Original Quantity: Quantity ordered.
- Cancelled: Quantity canceled.
- Backordered: Quantity of items on back order.
- Expected: Available quantity to receive and unit of measure.
- Date Expected: Date the items are expected.
- Group: (only in sort options Vendor Name and Location Group)
- Vendor: Name of the vendor the item is back ordered with.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Backorder Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Backorder Report**.
5. Click **Run**.
6. On the Inventory—Backorder Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Backorder Report
Sorted By Item Description

Item ID	Description	PO Number	UOM	Original Quantity	Cancelled	Backordered	Expected	Date Expected	Vendor
FCD4	Feline c/d 4 lb	116	bag	4.00	0.00	4.00	4.00 bag		Butler Schein
FDM	Feline DM can	116	case	3.00	0.00	3.00	72.00 can		Butler Schein
GENS	Gentocin topical spray	116	each	3.00	0.00	3.00	3.00 each		Butler Schein
ECLR15	Iams Canine Low Residue 15lb.	116	bag	3.00	0.00	3.00	3.00 bag		Butler Schein
CVP20	IVD Canine Venison Potato 20#	116	bag	2.00	0.00	2.00	2.00 bag		Butler Schein
CVP	IVD Canine Venison Potato canned	116	case	1.00	0.00	1.00	24.00 can		Butler Schein
MORPHI	Morphine Injection	116	bottle	10.00	0.00	10.00	200.00 cc		Butler Schein

Report Title: Inventory—Cost Report

Report Description

Use the Cost Report to view the cost of QOH tracking inventory on hand.

The Inventory Cost Report does not contain items that have a zero or negative quantity or a negative cost.

Only items for which you track quantity on hand are included on this report.

A copy of this report is saved to the Cstone\Share folder when processing End of Year.

Sort Order and Range

Sort Order	Range
• Item Description	• Item Description
• Class ID	• Item ID
• Vendor Name	
• Location ID	
• Location Group	

Report Fields

- Item ID: The unique identifier for each invoice item.
- Item Description: The name of the invoice item (Hospital Description).
- Base Price: An item's Base Price. This is set up on the Information tab on the Invoice Item Setup window.
- Quantity on Hand: The amount of invoice item quantity on hand in inventory.
- Average Cost: The average cost of the inventory item. (Total cost, divided by total QOH for an item).
- Total Cost: Quantity purchased multiplied by unit cost.
- Markup/Margin: The markup or margin on invoice item.
- Last Date: The date the invoice item price was last changed.
- Purchase Unit Cost: The last purchase cost.
- Primary Vendor: The name of the invoice item's primary vendor.
- Location: The item's location.
- Group: The item's location group (only in sort option Location Group).
- Total: The sub-total of total cost for the current sort order grouping Class ID, Vendor, Location, or Location Group.
- Grand Total: Sum of the total cost.
- Class: The item's classification ID. (Only in sort option Class ID).
- Subclass ID: The total for each classification. (Only in sort option Class ID).
- Vendor: The vendor's ID. (Only in sort option Vendor Name).

(Continued on next page)

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Cost Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Inventory—Cost Report**.
5. Click **Run**.
6. On the Inventory—Cost Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Cost Report
Sorted By Item Description

Item ID	Description	Base Price	QOH	Average Cost	Total Cost	Markup / Margin	Last Purchase Date	Unit Cost	Primary Vendor	Location	Group
1867	Absolute Ethyl Alcohol 100%	$0.00	0.00 [None]	$0.0000	$0.00			$0.0000	MWI Veterinary	CSTONE	
ACE10	Acepromazine tablet 10 mg	$0.65	0.00 tablet	$0.0000	$0.00	0.00%		$0.0000	MWI Veterinary	PHARMAC	
AMO400	Amoxicillin tablet 500 mg	$0.95	-116.00 each	$0.0000	$0.00	150.00%	10/7/2010	$0.0000	MWI Veterinary	CSTONE	
1863	Anhydrous Theophylline- gm	$0.00	0.00 [None]	$0.0000	$0.00			$0.0000	MWI Veterinary	CSTONE	
ATROIN	Atropine Injectable	$1.83	0.00 cc	$0.0000	$0.00	0.00%		$0.0000	MWI Veterinary	CSTONE	
BAY22	Baytril tablet 22.7mg	$1.15	-15.00 tablet	$0.0000	$0.00	0.00%		$0.0000	MWI Veterinary	PHARMAC	
BAY68	Baytril tablet 68mg	$2.43	-4.00 tablet	$0.0000	$0.00	0.00%		$0.0000	MWI Veterinary	PHARMAC	
BUPREN	Buprenex Injection and oral meds	$0.00	10.20 ampule	$0.0000	$0.00		12/23/2011	$0.0000	MWI Veterinary	CONTROL	
CSAL20	Canine d/d Salmon and Pot # 17.6	$41.97	1.00 bag	$0.0000	$0.00	0.00%	12/23/2011	$0.0000	Hills Science	DIET	
AD	canine / feline a/d can	$1.41	19.00 can	$1.0642	$20.22	33.00%	1/5/2010	$1.0604	Hills Science	DIET	
K9ALIT	Canine Adult Light Small Bites 5 lb	$7.91	0.00 bag	$0.0000	$0.00	33.00%		$0.0000	Hills Science	DIET	
ADSM40	Canine Adult Small Bites # 20	$26.13	0.00 bag	$0.0000	$0.00	33.00%	8/12/2011	$19.6500	Hills Science	DIET	
CBD10	Canine b/d 10#	$24.13	0.00 bag	$0.0000	$0.00	33.00%	8/27/2011	$18.1400	Hills Science	DIET	
CBD27	Canine b/d 27.5#	$56.22	1.00 bag	$42.2700	$42.27	33.00%	9/30/2011	$42.2700	Hills Science	DIET	
CCD10	Canine c/d 10 lb	$22.08	1.00 bag	$16.6000	$16.60	33.00%	10/28/2011	$16.6000	Hills Science	DIET	
CCD20	Canine c/d 20 lb	$36.67	1.00 bag	$27.5700	$27.57	33.00%	9/30/2011	$27.5700	Hills Science	DIET	
CCD40	Canine c/d 40 lb	$63.88	1.00 bag	$48.0300	$48.03	33.00%	12/23/2011	$48.0300	Hills Science	DIET	
CCD	Canine c/d can	$1.76	10.00 can	$1.3240	$13.24	33.00%	10/21/2010	$1.3242	Hills Science	DIET	
CDD	Canine d/d can-All Flavors	$2.65	12.00 can	$1.7025	$20.43	33.00%	12/23/2011	$1.7025	Hills Science	DIET	
194	Canine D/D Duck and Potato 17.6lb	$41.97	0.00 bag	$0.0000	$0.00	33.00%	6/24/2011	$31.5600	Hills Science	DIET	
CDRE20	Canine d/d rice & egg 17.6 lb	$41.97	1.00 bag	$0.0000	$0.00	0.00%		$0.0000	Hills Science	DIET	
CSAL10	Canine D/D Salmon and Pot # 8	$20.57	0.00 bag	$0.0000	$0.00	33.00%		$0.0000	Hills Science	DIET	
K9DAP	Canine DAP 3yr Vaccination	$54.00	0.00 dose	$0.0000	$0.00			$0.0000	MWI Veterinary	CSTONE	
GD40	Canine G/D 40lb	$55.67	1.00 bag	$41.8600	$41.86	33.00%	3/4/2011	$41.8600	Hills Science	DIET	
GDCAN	Canine G/D can	$1.42	12.00 can	$1.2258	$14.71		10/28/2011	$1.2258	Hills Science	DIET	
CHD20	Canine h/d 20 lb	$36.55	0.00 bag	$0.0000	$0.00	0.00%		$0.0000	Hills Science	DIET	
CHD	Canine h/d can	$1.53	14.00 can	$0.0000	$0.00	0.00%		$0.0000	Hills Science	DIET	
CID10	Canine i/d 10 lb	$30.66	3.00 bag	$18.7300	$56.19	33.00%	12/23/2010	$18.7300	Hills Science	DIET	
[illegible]	[illegible]	$43.33	3.00 bag	$32.5800	[illegible]			$32.5800	Hills Science	DIET	

Report Title: Inventory—Cost Totals Report

Report Description

The Cost Totals Report shows the cost of inventory on hand summarized by item classifications.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Class ID	• Class ID

Report Fields

- Class ID: Invoice Item Classification ID.
- Description: Classification description (only in sort option Location Group).
- Description: The name of the Invoice Item (Hospital Description).
- Grand Total: Sum of total cost.
- Location: (only in sort options Location or Location Group)
- Location Total: Sub-total of total cost per location. (Only in sort options Location or Location Group)
- Group: (only in sort option Location Group)
- Group Total: Sub-total of total cost per group. (only in sort option Location Group)

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Cost Totals Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Cost Totals Report**.
5. Click **Run**.
6. On the Inventory—Cost Totals Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Cost Totals Report

Sorted By Class ID

Class ID	Description	Total Cost
DEN	DENTAL	$365.94
EQPHAR	EQUINE PHARMACEUTICALS	$760.50
EQSP	EQUINE SUPPLIES	$44.00
FLEA	FLEA/TICK PRODUCTS	$6.92
HEA	HEARTWORM PREVENTION	$3,052.05
LAB	LABORATORY	$1,609.24
NTR	NUTRITIONAL	$3,501.17
OPHTA	OPHTHALMIC PRODUCTS	$462.99
PHA	PHARMACEUTICALS	$9,480.74
PRS	PROFESSIONAL SERVICES	$252.15
PTS	PET SHOP PRODUCTS	$652.96
SKC	SKIN CARE	$9,955.09
SUP	SUPPLIES	$1,110.81
VAC	VACCINES & BIOLOGICALS	$2,731.15
VAS	VACCINATIONS	$45.08
	Grand Total:	**$34,030.79**

Report Title: Inventory—Counts Report

Report Description

Use the Counts Report to view the location of items in your inventory.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Location • Class ID	• If **Sort by** is Item Description: Class ID, Item Description, Item ID, Location • If **Sort by** is Location: Class ID, Item Description, Location • If **Sort by** is Class ID: Class ID, Item Description, Item ID

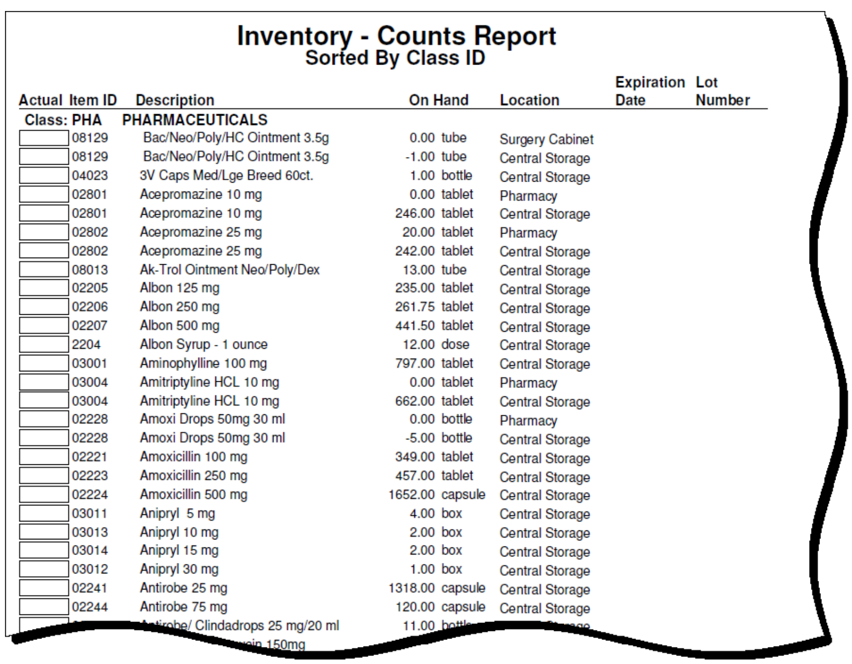
Report Fields

- Actual: A box to hand write current quantity on hand.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the Invoice Item (Hospital Description).
- On Hand: Current quantity on hand and unit of measure for item, item's location, expiration date or lot number.
- Location: Location of current items quantity.
- Expiration Date: Expiration date for current item quantity and location.
- Lot Number: Log number for current item quantity and location.
- Class: Invoice item classification ID and description (only in Sort option: Class ID).

tip The report lists the current quantity on hand for each item and provides a space to write the actual number of items physically available for each item.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Counts Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Counts Report**.
5. Click **Run**.
6. On the Inventory—Counts Report, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.



Inventory - Counts Report
Sorted By Class ID

Actual	Item ID	Description	On Hand		Location	Expiration Date	Lot Number
Class: PHA		PHARMACEUTICALS					
	08129	Bac/Neo/Poly/HC Ointment 3.5g	0.00	tube	Surgery Cabinet		
	08129	Bac/Neo/Poly/HC Ointment 3.5g	-1.00	tube	Central Storage		
	04023	3V Caps Med/Lge Breed 60ct.	1.00	bottle	Central Storage		
	02801	Acepromazine 10 mg	0.00	tablet	Pharmacy		
	02801	Acepromazine 10 mg	246.00	tablet	Central Storage		
	02802	Acepromazine 25 mg	20.00	tablet	Pharmacy		
	02802	Acepromazine 25 mg	242.00	tablet	Central Storage		
	08013	Ak-Trol Ointment Neo/Poly/Dex	13.00	tube	Central Storage		
	02205	Albon 125 mg	235.00	tablet	Central Storage		
	02206	Albon 250 mg	261.75	tablet	Central Storage		
	02207	Albon 500 mg	441.50	tablet	Central Storage		
	2204	Albon Syrup - 1 ounce	12.00	dose	Central Storage		
	03001	Aminophylline 100 mg	797.00	tablet	Central Storage		
	03004	Amitriptyline HCL 10 mg	0.00	tablet	Pharmacy		
	03004	Amitriptyline HCL 10 mg	662.00	tablet	Central Storage		
	02228	Amoxi Drops 50mg 30 ml	0.00	bottle	Pharmacy		
	02228	Amoxi Drops 50mg 30 ml	-5.00	bottle	Central Storage		
	02221	Amoxicillin 100 mg	349.00	tablet	Central Storage		
	02223	Amoxicillin 250 mg	457.00	tablet	Central Storage		
	02224	Amoxicillin 500 mg	1652.00	capsule	Central Storage		
	03011	Anipryl 5 mg	4.00	box	Central Storage		
	03013	Anipryl 10 mg	2.00	box	Central Storage		
	03014	Anipryl 15 mg	2.00	box	Central Storage		
	03012	Anipryl 30 mg	1.00	box	Central Storage		
	02241	Antirobe 25 mg	1318.00	capsule	Central Storage		
	02244	Antirobe 75 mg	120.00	capsule	Central Storage		
		Antirobe/ Clindadrops 25 mg/20 ml	11.00				

Report Title: Inventory—Evaluation Report

Report Description

Use the Evaluation Report to view information about each inventory item marked to maintain quantity on hand.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Class ID • Vendor Name	• If **Sort by** is Item Description: Class ID, Item Description • If **Sort by** is Class ID: Class ID, Item Description, Subclass ID • If **Sort by** is Vendor Name: Item Description, Vendor Name

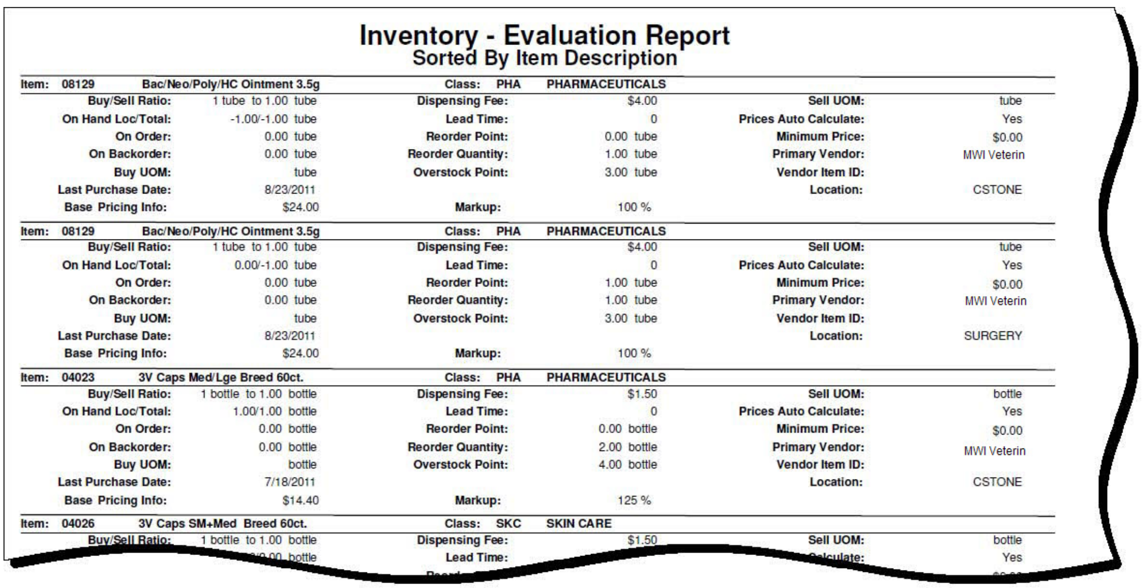
Report Fields

- Item: The unique identifier for each invoice item and the name of the invoice item (Hospital Description).
- Class: The unique identifier for each invoice classification and the name of the classification.
- Subclass: The unique identifier for each invoice subclassifications and the name of the subclassification (only in sort option Class ID).
- Buy/Sell Ratio: The unit of measure of how an item is bought in ratio to the unit of measure of how an item is sold. (i.e., 1 box = 12 tubes)
- Backorder: The total quantity of the item currently on back order.
- Buy UOM: The item's purchase unit of measure.
- Last Purchase Date: The date the item was last purchased.
- Base Pricing Info: An item's base price. This is set up on the Information tab on the invoice item setup window.
- Sell UOM: The unit of measure an item is sold at.
- Prices Auto Calculate: This field will indicate if an item's price is set to auto calculate.
- Minimum Price: The minimum price for which an item can be sold.
- Primary Vendor: The name of the invoice item's primary vendor.
- Vendor Item ID: The unique identifier for each vendor name.
- Location: Location of the item's information provided in this section of the report.
- On Hand Loc/Total: The total quantity of inventory on hand at the specified location and (1) the total quantity of inventory on hand at all locations.
- On Order: The total quantity of the item currently on order.
- Price Break Pricing Info: This field would provide any price break information and is only shown if used.
- Dispensing Fee: The item's dispensing fee.
- Lead Time: The amount of time to get the product in stock.
- Reorder Point: A point set, by the practice, for the item that will prompt the inventory manager it is time to reorder the invoice item.
- Reorder Quantity: A point set, by the practice, for the item that tells the inventory manager how much quantity of an item to reorder.
- Overstock Point: The overstock point is set, at a minimum, to be the Reorder Point + Reorder Quantity + 1.

(Continued on next page)

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Evaluation Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Evaluation Report**.
5. Click **Run**.
6. On the Inventory—Evaluation window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.



Inventory - Evaluation Report
Sorted By Item Description

Item: 08129	Bac/Neo/Poly/HC Ointment 3.5g	Class: PHA	PHARMACEUTICALS		
Buy/Sell Ratio:	1 tube to 1.00 tube	Dispensing Fee:	$4.00	Sell UOM:	tube
On Hand Loc/Total:	-1.00/-1.00 tube	Lead Time:	0	Prices Auto Calculate:	Yes
On Order:	0.00 tube	Reorder Point:	0.00 tube	Minimum Price:	$0.00
On Backorder:	0.00 tube	Reorder Quantity:	1.00 tube	Primary Vendor:	MWI Veterin
Buy UOM:	tube	Overstock Point:	3.00 tube	Vendor Item ID:	
Last Purchase Date:	8/23/2011			Location:	CSTONE
Base Pricing Info:	$24.00	Markup:	100 %		
Item: 08129	Bac/Neo/Poly/HC Ointment 3.5g	Class: PHA	PHARMACEUTICALS		
Buy/Sell Ratio:	1 tube to 1.00 tube	Dispensing Fee:	$4.00	Sell UOM:	tube
On Hand Loc/Total:	0.00/-1.00 tube	Lead Time:	0	Prices Auto Calculate:	Yes
On Order:	0.00 tube	Reorder Point:	1.00 tube	Minimum Price:	$0.00
On Backorder:	0.00 tube	Reorder Quantity:	1.00 tube	Primary Vendor:	MWI Veterin
Buy UOM:	tube	Overstock Point:	3.00 tube	Vendor Item ID:	
Last Purchase Date:	8/23/2011			Location:	SURGERY
Base Pricing Info:	$24.00	Markup:	100 %		
Item: 04023	3V Caps Med/Lge Breed 60ct.	Class: PHA	PHARMACEUTICALS		
Buy/Sell Ratio:	1 bottle to 1.00 bottle	Dispensing Fee:	$1.50	Sell UOM:	bottle
On Hand Loc/Total:	1.00/1.00 bottle	Lead Time:	0	Prices Auto Calculate:	Yes
On Order:	0.00 bottle	Reorder Point:	0.00 bottle	Minimum Price:	$0.00
On Backorder:	0.00 bottle	Reorder Quantity:	2.00 bottle	Primary Vendor:	MWI Veterin
Buy UOM:	bottle	Overstock Point:	4.00 bottle	Vendor Item ID:	
Last Purchase Date:	7/18/2011			Location:	CSTONE
Base Pricing Info:	$14.40	Markup:	125 %		
Item: 04026	3V Caps SM+Med Breed 60ct.	Class: SKC	SKIN CARE		
Buy/Sell Ratio:	1 bottle to 1.00 bottle	Dispensing Fee:	$1.50	Sell UOM:	bottle
	bottle	Lead Time:		Calculate:	Yes

Report Title: Inventory—Expiration Date Report

Report Description

Use the Expiration Date Report to view a list of inventory items that will expire before a specified date.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Location	• Class ID
• Item ID	• Expiration Date
• Item Description	• Item Description
• Class ID	• Item ID
	• Location

Report Fields

- Location: The unique identifier and the description for the location.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Class ID: The unique identifier for the classification of the invoice item.
- On Hand: The total amount of inventory of the invoice item in the location listed.
- Buy/Sell Ratio: The unit of measure of how an item is bought in ratio to the unit of measure of how an item is sold. (I.e. 1 box = 12 tubes)
- Total Value of Inventory: The total amount of all expired invoice items.
- Based on Last Cost: The total amount of all expired invoice items based on last cost.
- Based on Average Cost: The total amount of all expired invoice items based on the average cost.
- Expire Qty: The amount of inventory expired.
- Unit of Measure: The unit of measure of the expired quantity.
- Expiration Date: The invoice item's (product's) expiration date listed.
- Lot Number: The invoice item's (product's) lot number listed.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Expiration Date Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Expiration Date Report**.
5. Click **Run**.
6. On the Inventory—Expiration Date Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Expiration Date Report
Sorted By Location

Item ID	Description	Class ID	On Hand	Buy / Sell Ratio	Expire Qty	Unit of Measure	Expiration Date	Lot Number	Average Unit Cost	Total Cost
Central Storage		**CSTONE**								
02290	Duragesic Patch 25mcg	PHA	3.0	1 to 1	3.0	dose	6/30/2013	433637485	$0.0000	$0.00
						Total Value of Inventory for Central Storage				
						Based on Last Cost:				**$0.00**
						Based on Average Cost:				**$0.00**
Surgery Cabinet		**SURGERY**								
02290	Duragesic Patch 25mcg	PHA	1.0	1 to 1	1.0	dose	5/13/2013	3488654	$0.0000	$0.00
						Total Value of Inventory for Surgery Cabinet				
						Based on Last Cost:				**$0.00**
						Based on Average Cost:				**$0.00**
						Total Value of Inventory				
						Based on Last Cost:				**$0.00**
						Based on Average Cost:				**$0.00**

Report Title: Inventory—Internal Usage Report

Report Description

Use the Internal Usage Report to view all the items and their associated costs that were internally by the practice.

Only items for which you track quantity on hand are included on this report.

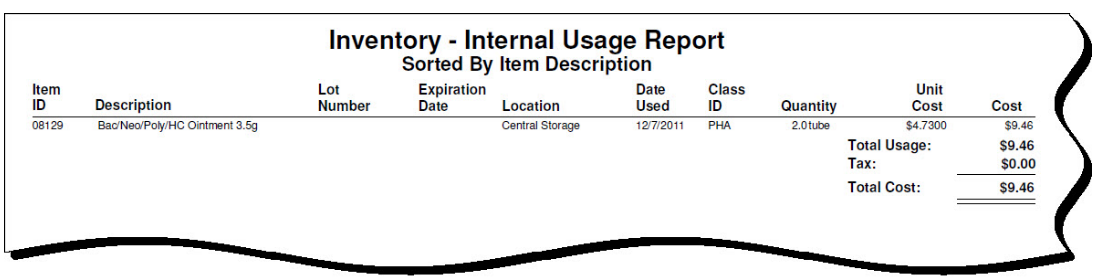
Sort Order and Range

Sort Order	Range
• Item Description • Class ID • Cost Center • Staff ID	• If **Sort by** is Item Description: Date, Item Description, Item ID • If **Sort by** is Class ID: Class ID, Date, Item Description, Item ID • If **Sort by** is Cost Center: Cost Center, Date, Item Description • If **Sort by** is Staff ID: Date, Item Description, Item ID, Staff ID

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Lot Number: The lot number, if applicable, of the item used internally.
- Expiration Date: The expiration date, if applicable, of the item used internally.
- Location: The location of the item used internally.
- Date Used: The date the item was used internally.
- Staff: The name and the staff's unique identifier. The staff who used / or removed the item from inventory for internal use (only in sort option Staff).
- Staff Usage: Cost of internal usage per staff (only in sort option Staff).
- Tax by Staff: Tax of internal usage per staff (only in sort option Staff).

Directions to Run the Report



Inventory - Internal Usage Report
Sorted By Item Description

Item ID	Description	Lot Number	Expiration Date	Location	Date Used	Class ID	Quantity	Unit Cost	Cost
08129	Bac/Neo/Poly/HC Ointment 3.5g			Central Storage	12/7/2011	PHA	2.0tube	$4.7300	$9.46
							Total Usage:		**$9.46**
							Tax:		**$0.00**
							Total Cost:		**$9.46**

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Internal Usage Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Internal Usage Report**.
5. Click **Run**.
6. On the Inventory—Internal Usage Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Report Title: Inventory—Items Profit Analysis Report

Report Description

Use the Items Profit Analysis Report to determine profitability of inventory items sold.

End of month must be processed twice and end of year once before data displays for the appropriate columns for this report. The data in this report corresponds to the date in the EOM Inventory Sales Report.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Class ID • Location ID • Revenue Center	• If **Sort by** is Class ID: Class ID, Item Description, Item ID • If **Sort by** is Location ID: Item Description, Item ID, Location ID • If **Sort by** is Revenue Center: Item Description, Item ID, Revenue Center

Report Fields

- Class: The unique identifier and description for the classification.
- Revenue Center: The unique identifier and description for each revenue center.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Month to Date—Frequency: Frequency sold this month. Frequency sales of the item.
- Month to Date—Sales: Quantity sold this month. Gross sales of the item (without taxes or discounts applied).
- Month to Date—Cost: Cost of the item sold this month.
- Month to Date—Profit: Profit of the item sold this month (sales minus cost).
- Year to Date—Frequency: Frequency sold this month. Frequency sales of the item.
- Year to Date—Sales: Quantity sold this year. Gross sales of the item (without taxes or discounts applied).
- Year to Date—Cost: Cost of the item sold this year.
- Year to Date—Profit: Profit of the item sold this year (sales minus cost).

tip Run and save/print the report prior to End of Year processing, as this report's totals update/clear at each End of Month/End of Year close.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Items Profit Analysis Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Items Profit Analysis Report**.
5. Click **Run**.
6. On the Inventory—Items Profit Analysis Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Items Profit Analysis Report
Sorted By Class ID

		Month to Date				Year to Date			
Item ID	**Description**	**Frequency**	**Sales**	**Cost**	**Profit**	**Frequency**	**Sales**	**Cost**	**Profit**
SUP	**SUPPLIES**								
09626	Buster Collar #25	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09627	Buster Collar #30	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
04256	Canine Pregnancy Test	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09621	Custom Care Collar #12	0.00	$0.00	$0.00	$0.00	9.00	$135.00	$0.00	$135.00
09623	Custom Care Collar #17	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09625	Custom Care Collar #23	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09624	Custom Care Collar #30	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09620	Custom Care Collar #8	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
08542	Feeding Tube 10 fr x 16	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
05934	Feeding Tube 14 fr x16	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09420	Feline FeLV + FIV Test	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09460	Feline Leukemia Test Kit	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
99998	General Health Profil 2test	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09423	Heartworm Test	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
01234	Home Again Chips	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09426	Parvo Test	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
99999	PresAnes Panel 4Test	0.00	$0.00	$0.00	$0.00	1.00	$0.00	$59.08	($59.08)
08667	Preventef Collars Feline	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
08666	Preventic Collars Canine	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
026130	Solu Delta Cortef 500mg 10ml	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
09932	Vicryl 7-0	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
VAC	**VACCINES & BIOLOGICALS**								
10444	Canine Lepto Vacine	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
01020	DA2ppvCv	0.00	$0.00	$0.00	$0.00	0.00	$0.00	$0.00	$0.00
[illegible]		0.00	$0.00	[illegible]	[illegible]	0.00	$0.00	$0.00	$0.00

Report Title: Inventory—Item Vendor Information Report

Report Description

Use the Item Vendor Information Report to view a list of vendors and associated information assigned to any inventory item through the Invoice Item List.

Sort Order and Range

Sort Order	Range
• Item Description	• Item Description
• Vendor Name	• Vendor Name

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Vendor: Name of the item's vendor and the vendor's unique identifier (only in sort option Vendor).
- Primary: Yes or No field. The item's primary vendor is marked Yes.
- Contact: The name of the Vendor's contact (only in sort option Vendor).
- Vendor Item ID: The vendor's unique identifier for each invoice item.
- Cost: Cost of the item.
- Date: Date the invoice item was last ordered.
- Lead Time: Number of days it normally takes to receive the item from the vendor after the order is placed.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Item Vendor Information Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Item Vendor Information Report**.
5. Click **Run**.
6. On the Inventory—Item Vendor Information Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Item Vendor Information Report
Sorted By Item Description

Item ID	Description	Vendor	Primary	Contact	Vendor Item ID	Cost	Date	Lead Time
05670	a/d Canine/Feline Can 5.5 oz	MWI Veterinary Supply	Yes			$0.74	11/13/2011	0 days
		MWI Veterinary Supply	Yes			$0.74	11/13/2011	0 days
		MWI Veterinary Supply	Yes	Tobie		$0.74	11/13/2011	0 days
09945	Acarexx otic	Webster Veterinary	No			$7.00	9/21/2011	0 days
		Webster Veterinary	No	Nancy		$7.00	9/21/2011	0 days
		Webster Veterinary	No	Ed Tucker		$7.00	9/21/2011	0 days
02801	Acepromazine 10 mg	Webster Veterinary	Yes			$0.10	8/9/2011	0 days
		Webster Veterinary	Yes	Nancy		$0.10	8/9/2011	0 days
		Webster Veterinary	Yes	Ed Tucker		$0.10	8/9/2011	0 days
		TW Veterinary Medical !	No	Ordering		$0.07	7/25/2011	0 days
		TW Veterinary Medical !	No	Fax		$0.07	7/25/2011	0 days
		TW Veterinary Medical !	No	Benjamin Weathers		$0.07	7/25/2011	0 days
02802	Acepromazine 25 mg	Butler Schein	No	Account		$0.17	8/15/2011	0 days
		Butler Schein	No	Jimmy Wilcox or		$0.17	8/15/2011	0 days
		Webster Veterinary	Yes			$0.19	8/4/2011	0 days
		Webster Veterinary	Yes	Nancy		$0.19	8/4/2011	0 days
		Webster Veterinary	Yes	Ed Tucker		$0.19	8/4/2011	0 days
		MWI Veterinary Supply	No			$0.15	5/24/2011	0 days
		MWI Veterinary Supply	No			$0.15	5/24/2011	0 days
		MWI Veterinary Supply	No	Tobie		$0.15	5/24/2011	0 days

Report Title: Inventory—Linked Items Report

Report Description

The Linked Items Report lists all the invoice items that have QOH tracking inventory items linked to them.

Sort Order and Range

Sort Order	Range
• Item Description	• Item Description • Item ID

Report Fields

- Item ID: The unique identifier for each invoice item of the invoice item that has an inventory item linked to it.
- Description: The name of the invoice item (Hospital Description) of the invoice item that has an inventory item linked to it.
- Linked Item ID: The unique identifier for each inventory item linked to the invoice item.
- Linked Item Description: The name of the inventory item linked to the invoice item.
- Quantity: Quantity of the inventory item linked to the invoice item.
- UOM: Unit of measure of the inventory item linked to the invoice item.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Linked Items Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Linked Items Report**.
5. Click **Run**.
6. On the Inventory—Linked Items Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Linked Items Report
Sorted By Item Description

Item ID	Description	Linked Item ID	Linked Item Description	Quantity	UOM
1011	CANINE BORDETELLA 1st VAC	01050	Intra Trac II/k-9 Bordettla	1.0	dose
1010	CANINE BORDETELLA BOOSTER	01050	Intra Trac II/k-9 Bordettla	1.0	dose
1040	CANINE DHLPPC ADULT	01021	DA2ppvLCv	1.0	dose
1041	CANINE DHPPC FIRST VAC	01020	DA2ppvCv	1.0	dose
1042	CANINE DHPPC SECOND VAC	01021	DA2ppvLCv	1.0	dose
1044	CANINE LEPTO BOOSTER	10444	Canine Lepto Vacine	1.0	dose
1111	CANINE LYMES DISEASE 1ST VAC	01057	Lyme Disease (Borrelia)	1.0	dose
1110	CANINE LYMES DISEASE VAC	01057	Lyme Disease (Borrelia)	1.0	dose
1120	CANINE PARVOVIRUS BOOSTER	01065	Parvo	1.0	dose
4256	CANINE PREGNANCY TEST {HOSP}	04256	Canine Pregnancy Test	1.0	each
1131	CANINE RABIES 1 YEAR	01077	Imrab 3 Rabies Vaccine	1.0	dose
1133	CANINE RABIES 3 YEAR	01077	Imrab 3 Rabies Vaccine	1.0	dose
2186	CHEM-PRESURGICAL SCREEN	99999	PresAnes Panel 4Test	1.0	each
EQBAI	EQ-Banamine Injection	EQBAN	EQ-Banamine	10.0	cc
EQPENI	EQ-Penicilin G Injection	EQ1955	EQ-Penicillin G	10.0	cc
EQROI	EQ-Rompun Injection	EQROM	EQ-Rompun	5.0	cc
1085	FELINE BORDETELLA BOOSTER	01147	Feline Bordatella	1.0	dose
1086	FELINE BORDETELLA FIRST	01147	Feline Bordatella	1.0	dose
1080	FELINE FIP BOOSTER	01035	FIP	1.0	dose
1081	FELINE FIP FIRST VAC	01035	FIP	1.0	dose
1082	FELINE FIP SECOND VAC	01035	FIP	1.0	dose
1095	FELINE FIV VACCINE #1	01137	Fel-O-Vax FIV	1.0	dose
1096	FELINE FIV VACCINE #2	01137	Fel-O-Vax FIV	1.0	dose
1097	FELINE FIV VACCINE BOOSTER	01137	Fel-O-Vax FIV	1.0	dose
4235	FELINE LEUKEMIA + FIV (HOSP)	09420	Feline FeLV + FIV Test	1.0	each
1060	FELINE LEUKEMIA BOOSTER	01055	Feline Felv Vac	1.0	dose
1061	FELINE LEUKEMIA FIRST VAC	01055	Feline Felv Vac	1.0	dose
4230	[illegible] TEST (HOSP)	09460	[illegible]	1.0	each
[illegible]	[illegible]	[illegible]	[illegible]	1.0	dose

Report Title: Inventory—On Order Report

Report Description

Use the On Order Report to view detailed order information for any inventory items currently on order.

Sort Order and Range

Sort Order	Range
• Vendor Name • Item Description • Class ID	• If **Sort by** is Vendor Name: Item Description, Vendor Name • If **Sort by** is Item Description: Item Description, Vendor Name • If **Sort by** is Class ID: Class ID, Item Description, Vendor Name

Report Fields

- Vendor: Name of the vendor the items are on order from (only in sort option Vendor Name).
- Class: The unique identifier and name of an item's classification (only in sort option Class ID).
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Quantity on Hand: The amount of invoice item quantity on hand in inventory.
- Quantity on Order: The amount of invoice item quantity on order.
- PO Number: Purchase order number.
- Order Date: The date of the purchase order.
- Lead Time: The amount of time it takes to get the order in stock.
- Group: The group the items belongs to.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **On Order Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **On Order Report**.
5. Click **Run**.
6. On the Inventory—On Order Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - On Order Report

Sorted By Vendor Name

Item ID	Description	Quantity On Hand	Quantity On Order	PO Number	Order Date	Lead Time	Group
Vendor: Wilson Pet Supply							
02129	Denosyl SD4 90mg 30 count	1.00 box	5.00 box	1146	8/22/2011	0 days	
Vendor: MWI Veterinary Supply							
02221	Amoxicillin 100 mg	599.00 tablet	50.00 tablet	1151	1/21/2011	0 days	
02006	Doxycycline 100MG	327.00 tablet	200.00 tablet	1151	1/21/2011	0 days	
01045	Immunoregulin 5 ml	0.00 cc	50.00 cc	1151	1/21/2011	0 days	

Report Title: Inventory—Overstock Report

Report Description

The Overstock Report displays a list of QOH tracking inventory items that are above their overstock point, according to reorder information set up at the practice and current QOH.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Class ID	• If **Sort by** is Item Description: Item Description • If **Sort by** is Class ID: Class ID, Item Description

Report Fields

- Class: The unique identifier and description of the classification (only in sort option Class ID).
- Location: The unique identifier and description of the location (only in sort option Location ID).
- Group: The description of the location group (only in sort option Location Group).
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- QOH: Quantity on hand of the item on overstock.
- Overstock Level: The amount set as an overstock level.
- Overstock Cost: The amount (cost) of the overstock level.
- Total Cost: Overstock level times overstock cost.
- Location: Location of the overstock items.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Overstock Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Overstock Report**.
5. Click **Run**.
6. On the Inventory—Overstock Report window, select the sort order.

Inventory - Overstock Report
Sorted By Item Description

Item ID	Description	QOH	Overstock Level	Overstock Cost	Total Cost	Location
05670	a/d Canine/Feline Can 5.5 oz	91.00	72.00 can	$14.04	$67.26	CSTONE
02801	Acepromazine 10 mg	246.00	151.00 tablet	$6.98	$18.08	CSTONE
02802	Acepromazine 25 mg	242.00	151.00 tablet	$17.26	$45.91	CSTONE
08644	Advantage Feline Orange <9lbs	31.00	19.00 pack	$240.32	$620.82	CSTONE
02224	Amoxicillin 500 mg	1652.00	751.00 capsule	$64.51	$118.28	CSTONE
03011	Anipryl 5 mg	4.00	3.00 box	$0.00	$0.00	CSTONE
02241	Antirobe 25 mg	1318.00	901.00 capsule	$99.87	$315.66	CSTONE
02242	Antirobe/Clindamycin 150mg	287.00	151.00 capsule	$79.80	$168.41	CSTONE
09600	Cat Carrier	46.00	17.00 each	$59.45	$94.30	CSTONE
02350	Cephalexin 250 mg	977.00	801.00 capsule	$20.38	$113.14	CSTONE
02811	Cimetidine oral/Tagament	18.00	13.00 ounce	$13.43	$48.34	CSTONE
07102	Cimetidine Tablets 200mg	193.00	126.00 tablet	$7.64	$22.02	CSTONE
02262	Clavamox 125 mg	241.00	200.00 tablet	$14.76	$86.77	PHARM
02260	Clavamox Drops	36.00	24.00 bottle	$64.19	$192.58	CSTONE
02260	Clavamox Drops	15.00	10.00 bottle	$26.75	$80.24	PHARM
09527	CNM Canine EN Can 12.50oz	137.00	94.00 can	$32.90	$104.82	CSTONE
05972	CNM Fel DM Canned 5.oz	54.00	25.00 can	$17.60	$32.78	CSTONE
09435	Cortrosyn	37.00	30.00 dose	$167.93	$887.63	CSTONE
09200	CREATINE SLIDES	158.00	50.00 each	$352.08	$515.08	CSTONE
02005	Dexamethasone 0.25mg	1055.00	751.00 tablet	$9.30	$32.28	CSTONE
02635	Drontal Plus Small Canine	101.50	76.00 tablet	$55.61	$221.35	CSTONE
0528	ENZA Feline Chews	26.00	24.00 each	$9.98	$129.74	CSTONE
08717	Epi-Otic Ear Solution 8 oz	16.00	13.00 bottle	$18.24	$97.26	CSTONE
100697	EQ-Amikacin 250mg per ml	33.00	20.00 cc	$104.00	$264.00	CSTONE
01035	FIP	80.00	75.00 dose	$41.57	$665.11	CSTONE
09640	Gentle Leader	11.00	10.00 each	$8.39	$92.34	CSTONE
09188		98.00	50.00 each	$119.36	$243.69	CSTONE
		26.00			$146.55	CSTONE

7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Report Title: Inventory—Partial Receipts Report

Report Description

The Partial Receipts Report lists orders that have been partially filled but remain open because some items on the order have not been received yet.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Vendor Name	• Date • Item Description • PO Number • Vendor Name

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Quantity Ordered: The amount of invoice item's quantity ordered.
- Quantity Received: The amount of invoice item's received on the receipt.
- Receipt Number: The receipt number of the order.
- Unit Cost: The unit of measure cost of each item.
- Vendor: The unique identifier and description for the vendor.
- PO Number: The Purchase order number.
- Date: The purchase order date.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Partial Receipts Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Partial Receipts Report**.
5. Click **Run**.
6. On the Inventory—Partial Receipts Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Partial Receipts Report
Sorted By Vendor Name

Item ID	Description	Quantity Ordered	Quantity Received	Receipt Number	Unit Cost
Vendor: WIL	**Wilson Pet Supply**				
PO Number: 1146	**Tuesday, August 22, 2006**				
02129	Denosyl SD4 90mg 30 count	5.00 box			
Vendor: MWI	**MWI Veterinary Supply**				
PO Number: 1151	**Thursday, January 21, 2010**				
01045	Immunoregulin 5 ml	200.00 cc	150.00 cc	r124	$0.12
02006	Doxycycline 100MG	200.00 tablet			
02221	Amoxicillin 100 mg	300.00 tablet	250.00 tablet	r124	$0.12

Report Title: Inventory—Purchase History Report

Report Description	Sort Order	Range
Use the Purchase History Report to view a list of past vendor transactions, including the receipt and return of inventory items, for the practice.	• Item Description • Class ID • Vendor Name • Vendor by Order • Vendor by Receipt	• If **Sort by** is Item Description: Date, Item Description, Item ID • If **Sort by** is Class ID: Class ID, Date, Item Description, Item ID • If **Sort by** is Vendor Name: Item Description, Vendor Name • If **Sort by** is Vendor by Order: Item Description, PO Number, Vendor Name • If **Sort by** is Vendor by Receipt: Item Description, Receipt Number, Vendor Name

Report Fields

- Item ID: The unique identifier for each invoice item and the name of the invoice item (hospital description).
- Date: Receipt date.
- Type: Type of invoice item (S, I, G, P).
- Quantity Purchased: Quantity and unit of measure.
- Unit Cost: The cost of the item's unit of measure.
- Total Cost: Quantity purchased multiplied by unit cost.
- Vendor: The name of the item's vendor.
- Subtotal: Sum of total cost per item.
- Total: Sum of all items total cost.
- Class: The unique identifier and description of a classification (only in sort option Class ID).
- Class Subtotal: Sum of total cost per Class ID (only in sort option Class ID).
- Vendor Name: The unique identifier and description of the vendor.
- Subtotal for Vendor: Sum of total cost per vendor (only in sort option Vendor Name, Vendor by Order and Vendor by Receipt).
- PO Number: Purchase order number (only in sort option Vendor by Order).
- Subtotal for PO Number: Sum of total cost per PO number (only in sort option Vendor by Order).
- Receipt Number: Receipt number and ate (only in sort option Vendor by Receipt).
- Subtotal for Receipt: Sum of total cost per receipt (only in sort option Vendor by Receipt).

(Continued on next page)

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Purchase History Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Purchase History Report**.
5. Click **Run**.
6. On the Inventory—Purchase History Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Purchase History Report
Sorted By Item Description

Date	Type		Quantity Purchased	Unit Cost		Total Cost	Vendor
02262		**Clavamox 125 mg**					
1/20/2011	Receipt		150.00 tablet	$0.3600		$54.00	Pfizer Animal Health
					Subtotal	$54.00	
02260		**Clavamox Drops**					
1/20/2011	Receipt		15.00 bottle	$5.3500		$80.25	Pfizer Animal Health
					Subtotal	$80.25	
01021		**DA2ppvLCv**					
1/21/2011	Receipt		5.00 dose	$3.0000		$15.00	Pfizer Animal Health
					Subtotal	$15.00	
02006		**Doxycycline 100MG**					
1/21/2011	Receipt		150.00 tablet	$0.0900		$13.50	Pfizer Animal Health
					Subtotal	$13.50	
0528		**ENZA Feline Chews**					
1/20/2011	Receipt		25.00 each	$4.9900		$124.75	Pfizer Animal Health
					Subtotal	$124.75	
0522		**ENZA K9 Chews Small**					
1/20/2011	Receipt		10.00 bag	$5.9900		$59.90	Pfizer Animal Health
					Subtotal	$59.90	
					Total:	$347.40	

Report Title: Inventory—Receipt Report

Report Description

Use the Receipt Report to view detailed information about items the practice has received.

Sort Order and Range

Sort Order	Range
• Vendor by Receipt	• Item ID • Receipt Date • Receipt Number • Vendor Name

Report Fields

- Vendor: The unique identifier and description of the vendor (only in sort option Vendor by Receipt).
- Location: The location the items will be received into (only in sort option Location by Receipt).
- Receipt: Receipt number, date and vendor (only in sort option Location by Receipt).
- Cost: Cost per smallest unit of measure.
- Tax: Tax sum per item, vendor.
- Total Cost: Quantity multiplied by cost.
- Special: * displays if item's cost was a special price.
- Shipping Charge: Shipping charge per receipt.
- Tax: Sum of tax per receipt.
- Total Cost: Quantity multiplied by cost.
- Subtotal: Sum of total cost.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (hospital description).
- PO Number: Purchase Order number.
- Quantity: Quantity and unit of measure received.
- Staff ID: Who received the order.
- Grand Total Shipping Charge: Sum of all shipping charges.
- Grand Total Tax: Sum of all taxes.
- Grand Total Cost: Subtotal, (+) plus grand total shipping charge, (+) plus grand total tax.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Receipt Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Receipt Report**.
5. Click **Run**.
6. On the *I*nventory—Receipt Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Receipt Report
Sorted By Vendor by Recpt.

Item ID	Description	PO Number	Quantity	Staff ID	Cost	Tax	Total Cost	Special
Vendor: PFI	**Pfizer Animal Health**							
Receipt: r1	**1/20/2010**							
02260	Clavamox Drops	1150	15.00 bottle	1	$5.3500	$0.00	$80.25	
02262	Clavamox 125 mg	1150	150.00 tablet	1	$0.3600	$0.00	$54.00	
0522	ENZA K9 Chews Small	1150	10.00 bag	1	$5.9900	$0.00	$59.90	
0528	ENZA Feline Chews	1150	25.00 each	1	$4.9900	$0.00	$124.75	
						Shipping Charge:	$0.00	
						Tax:	$0.00	
						Total Cost:	$318.90	
Receipt: r2	**1/21/2010**							
01021	DA2ppvLCv		5.00 dose	1	$3.0000	$0.12	$15.00	*
02006	Doxycycline 100MG		150.00 tablet	1	$0.0900	$1.55	$13.50	*
						Shipping Charge:	$0.00	
						Tax:	$1.67	
						Total Cost:	$30.17	
						SubTotal:	$347.40	
						Grand Total Shipping Charge :	$0.00	
						Grand Total Tax:	$1.67	
						Grand Total Cost:	$349.07	

Report Title: Inventory—Reorder Report

Report Description

Use the Reorder Report to view a list of inventory items, marked to maintain quantity on hand that are at or below their reorder points.

This report is equivalent to the Suggested list found on the Purchasing Work List window.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Vendor Name • Class ID • Location ID • Location Group	• If **Sort by** is Item Description: Item Description, Item ID • If **Sort by** is Vendor Name: Item Description, Item ID, Vendor Name • If **Sort by** is Class ID: Class ID, Item Description, Item ID

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (hospital description).
- Quantity on Hand: Amount of inventory on hand.
- Reorder Point: The point set by the practice as the point to reorder.
- Reorder Quantity: The amount of inventory set by the practice as the amount of inventory to reorder.
- Total Qty on Order: Total amount of inventory on order.
- Lead Time: The amount of time it would take to get an item from a vendor.
- Last Cost: The last cost of an item ordered.
- Primary Vendor: The item's primary vendor—the vendor the item is primarily ordered from.
- Location: The location the item is to be ordered into.
- Vendor: The unique identifier and description for the vendor (only in sort option Vendor Name).
- Class: The unique identifier and description for the classification (only in sort option Class ID).
- Location: The unique identifier and description for the location (only in sort option Location ID).
- Group: The description of an item's group (only in sort option Location Group).

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Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Reorder Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Reorder Report**.
5. Click **Run**.
6. On the Inventory—Reorder Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

tip This report contains the same information that displays on the Purchasing Worklist window.

Inventory - Reorder Report

Sorted By Item Description

Item ID	Description	Quantity On Hand	Reorder Point	Reorder Quantity	Total Qty On Order	Lead Time	Last Cost	Primary Vendor	Location
08129	Bac/Neo/Poly/HC Ointment 3.5g	-1.0	0.0tube	1.0tube	6.0tube	1. days	$12.00	Wilson Pet	CSTONE
08129	Bac/Neo/Poly/HC Ointment 3.5g	0.0	1.0tube	1.0tube	6.0tube	1. days	$12.00	Wilson Pet	SURGERY
02801	Acepromazine 10 mg	0.0	25.0tablet	12.0tablet	0.0tablet	1. days	$0.07	Wilson Pet	PHARM
02802	Acepromazine 25 mg	20.0	30.0tablet	20.0tablet	0.0tablet	1. days	$0.19	Wilson Pet	PHARM
08714	ADL Foaming Ear Cleaner 8oz.	3.0	6.0bottle	12.0bottle	0.0bottle	2. days	$6.90	Veterinary F	CSTONE
08643	Advantage Canine Blue over 55lbs	0.0	4.0pack	8.0pack	0.0pack	2. days	$24.59	MWI Veterir	PHARM
08640	Advantage Canine Green 0-10lbs	0.0	4.0pack	8.0pack	0.0pack	2. days	$22.86	MWI Veterir	PHARM
08642	Advantage Canine Red 21-55lbs	0.0	6.0pack	12.0pack	0.0pack	2. days	$23.73	MWI Veterir	CSTONE
08641	Advantage Canine Teal 11-20lbs	1.0	6.0pack	12.0pack	0.0pack	2. days	$23.15	MWI Veterin	CSTONE
08644	Advantage Feline Orange <9lbs	0.0	4.0pack	8.0pack	0.0pack	2. days	$19.50	MWI Veterin	PHARM
03004	Amitriptyline HCL 10 mg	0.0	150.0tablet	100.0tablet	0.0tablet	2. days	$0.02	Veterinary P	PHARM
02228	Amoxi Drops 50mg 30 ml	-5.0	4.0bottle	12.0bottle	0.0bottle	2. days	$4.75	Veterinary P	CSTONE
02228	Amoxi Drops 50mg 30 ml	0.0	2.0bottle	5.0bottle	0.0bottle	2. days	$4.75	Veterinary P	PHARM
08866	Bactoderm 15gr	1.0	1.0tube	1.0tube	0.0tube	2. days	$6.30	Wilson Pet	SURGERY
02265	Baytril 136mg	0.0	15.0tablet	8.0tablet	0.0tablet	2. days	$1.90	Wilson Pet	PHARM
02256	Baytril 22.7	0.0	150.0tablet	200.0tablet	0.0tablet	2. days	$0.41	Wilson Pet	PHARM
05874	c/d Canine Dry 10 lbs	-40.0	0.0bag	3.0bag	0.0bag	2. days	$0.00	MWI Veterin	CSTONE
05876	c/d Canine Dry 20 lbs	-19.0	0.0bag	3.0bag	0.0bag	2. days	$17.93	MWI Veterin	CSTONE
05842	c/d-s Feline Dry 10 lbs	-1.0	0.0bag	3.0bag	0.0bag	2. days	$15.25	MWI Veterin	CSTONE
10444	Canine Lepto Vacine	-123.0	25.0dose	25.0dose	0.0dose	2. days	$1.21	Wilson Pet S	CSTONE
02352	Cephalexin 500 mg	0.0	200.0tablet	300.0tablet	0.0tablet	2. days	$0.22	Wilson Pet S	PHARM
02351	Cephalexin Suspension	0.0	1.0bottle	1.0bottle	0.0bottle	2. days	$4.90	Wilson Pet S	PHARM
02262	Clavamox 125 mg	0.0	75.0tablet	210.0tablet	0.0tablet	5 days	$0.36	Pfizer Animal	CSTONE
02263	Clavamox 250 mg	0.0	50.0tablet	100.0tablet	0.0tablet	2. days	$0.61	Pfizer Animal	PHARM
[illegible]	[illegible]	20.0	75.0tablet	[illegible]	[illegible]	[illegible]	$0.88	Pfizer Animal	CSTONE

Report Title: Inventory—Returns Report

Report Description

The Returns Report lists all of the items that have been returned to a vendor.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Date • Vendor Name	• If **Sort by** is Date: Date, Item Description, Vendor Name • If **Sort by** is Vendor Name: Item Description, Item ID, Vendor Name

Report Fields

- Date: Return date of the invoice items.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (hospital description).
- Quantity Returned: The invoice item returned quantity and buy unit of measure.
- Cost: Cost per unit.
- Lot Number: The unique number assigned to an invoice item.
- Expiration Date: The invoice item's expiration date.
- Vendor: The vendor name to which the item is returned.
- Location: The location that the item was returned.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Returns Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Returns Report**.
5. Click **Run**.
6. On the Inventory—Returns Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Returns Report
Sorted By Date

Date	Item ID	Description	Quantity Returned	Cost	Lot Number	Expiration Date	Vendor	Location
1/21/2011	09527	CNM Canine EN Can 12.50oz	35.00 can	$0.7600			Butler Schein	Central Storage
1/21/2011	05921	CNM Feline CV 5.5oz Canned	10.00 can	$0.5270			Butler Schein	Central Storage
1/21/2011	05931	CNM Feline NF Canned	20.00 can	$0.5600			Butler Schein	Central Storage
1/21/2011	0547	CNM Feline UR 18#	1.00 bag	$20.0500			Butler Schein	Central Storage
1/21/2011	07652	Cytotec 100mcg	30.00 tablet	$0.9108			Medicine Shoppe	Central Storage
1/21/2011	04342	IVD Rabbit & Pea Can Feline	30.00 can	$0.9600			Butler Schein	Central Storage
1/21/2011	04341	IVD Rabbit & Potato Canine 10#	2.00 bag	$13.6400			Butler Schein	Central Storage
1/21/2011	04338	IVD Vension & Pea 8# Feline	1.00 bag	$18.1900			Butler Schein	Central Storage
1/21/2011	02102	Pediapred Oral Solution	14.00 cc	$0.2900			Medicine Shoppe	Central Storage
1/21/2011	07442	Revolution Feline 5-15lb (3PK)	11.00 package	$17.5000			Pfizer Animal Health	Central Storage
1/21/2011	02115	Rimadyl 25mg	100.00 tablet	$0.3900			Pfizer Animal Health	Central Storage
1/21/2011	07651	Sucralfate 1gm	15.00 tablet	$0.1500			Medicine Shoppe	Central Storage

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Report Title: Inventory—Turnover Report

Report Description

The Turnover Report helps track how many times inventory completes a cycle of being received or sold.

End of Month (EOM) must be processed to have date selections.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Class ID	• Beginning Period Date Processed • Ending Period Date Processed

Report Fields

- Class: The unique identifier and description of a classification.
- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (Hospital Description).
- Beg. QOH: The beginning quantity on hand for the item.
- Received: The quantity of items received into inventory.

tip
- Use the ratios to adjust purchase patterns and to help optimize cash flow.
- The ratio that displays is the amount of the item depletion divided by the item's average quantity on hand. The validity of the report depends on the accuracy of the QOH. If receipts, returns, and internal usage are not used correctly, the turnover ratio may not be accurate.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Turnover Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Turnover Report**.
5. Click **Run**.
6. On the Inventory—Turnover Report window, the sort order.

Inventory - Turnover Report
Sorted By Item Description
From: Sunday, July 30, 2006 9:19:45 PM To: Thursday, January 21, 2010 11:25:46 AM

Item ID	Description	Beg. QOH	Received	Adjusted	Returned	End QOH	Turnover
08129	Bac/Neo/Poly/HC Ointment 3.5g	-3.00	2.00	0.00	0.00	-1.00	-0.00
04023	3V Caps Med/Lge Breed 60ct.	1.00	0.00	0.00	0.00	1.00	0.00
04026	3V Caps SM+Med Breed 60ct.	2.00	0.00	0.00	0.00	2.00	0.00
05670	a/d Canine/Feline Can 5.5 oz	92.00	0.00	0.00	0.00	91.00	0.01
02801	Acepromazine 10 mg	246.00	0.00	0.00	0.00	246.00	0.00
02802	Acepromazine 25 mg	262.00	0.00	0.00	0.00	262.00	0.00
08714	ADL Foaming Ear Cleaner 8oz.	3.00	0.00	0.00	0.00	3.00	0.00
08643	Advantage Canine Blue over 55lbs	15.00	0.00	0.00	0.00	15.00	0.00
08640	Advantage Canine Green 0-10lbs	12.00	0.00	0.00	0.00	12.00	0.00
08642	Advantage Canine Red 21-55lbs	6.00	0.00	0.00	0.00	6.00	0.00
08641	Advantage Canine Teal 11-20lbs	9.00	0.00	0.00	0.00	9.00	0.00
08644	Advantage Feline Orange <9lbs	31.00	0.00	0.00	0.00	31.00	0.00
04520	Advantage Feline Orange <9lbs -6mo	10.00	0.00	0.00	0.00	10.00	0.00
08645	Advantage Feline Purple >9lbs	10.00	0.00	0.00	0.00	10.00	0.00
09455	Advantage Feline Purple>9lbs -6mo	5.00	0.00	0.00	0.00	5.00	0.00
04045	Advantage K-9 Blue >55lbs 6month	9.00	0.00	0.00	0.00	9.00	0.00
04046	Advantage K-9 Green <10lb 6month	10.00	0.00	0.00	0.00	10.00	0.00
04504	Advantage K-9 Red 21-55lbs 6month	6.00	0.00	0.00	0.00	6.00	0.00
04950	Advantage K-9 Teal 11-20lbs 6month	14.00	0.00	0.00	0.00	14.00	0.00
08013	Ak-Trol Ointment Neo/Poly/Dex	13.00	0.00	0.00	0.00	13.00	0.00
02205	Albon 125 mg	235.00	0.00	0.00	0.00	235.00	0.00
02206	Albon 250 mg	261.75	0.00	0.00	0.00	261.75	0.00
02207	Albon 500 mg	441.50	0.00	0.00	0.00	441.50	0.00
2204	Albon Syrup - 1 ounce	12.00	0.00	0.00	0.00	12.00	0.00
		3.00				3.00	0.00

7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Report Title: Inventory—Usage Tax Report

Report Description

Use the Usage Tax Report to show the cumulative amount of tax owed based on internal use.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Date	• Date
• Location Group	

Report Fields

- Group: Description of group (only in sort option Location Group).
- Tax Description: The description of the tax.
- Tax Percentage: The tax percentage of a given tax (tax description).
- Taxable Usage: The amount that is used internally that is taxable.
- Total Tax Amount: The amount of total tax based on the internal usage.
- Group Tax: The amount of total tax based on the group's (location) internal usage (only in sort option Group Location).
- Total Tax: Sum of total tax amount column.

tip Some states require practices to pay taxes on items used internally.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Usage Tax Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Usage Tax Report**.
5. Click **Run**.
6. On the Inventory—Usage Tax Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Usage Tax Report
Sorted By Date

Tax Description	Tax Percentage	Taxable Usage	Total Tax Amount
Kansas State Sales Tax	7.525	$2,285.62	$171.99
		Total Tax:	**$171.99**

Report Title: Inventory—Vendor Summary Report

Report Description

Use the Vendor Summary Report to view detailed information about the vendors that are set up.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

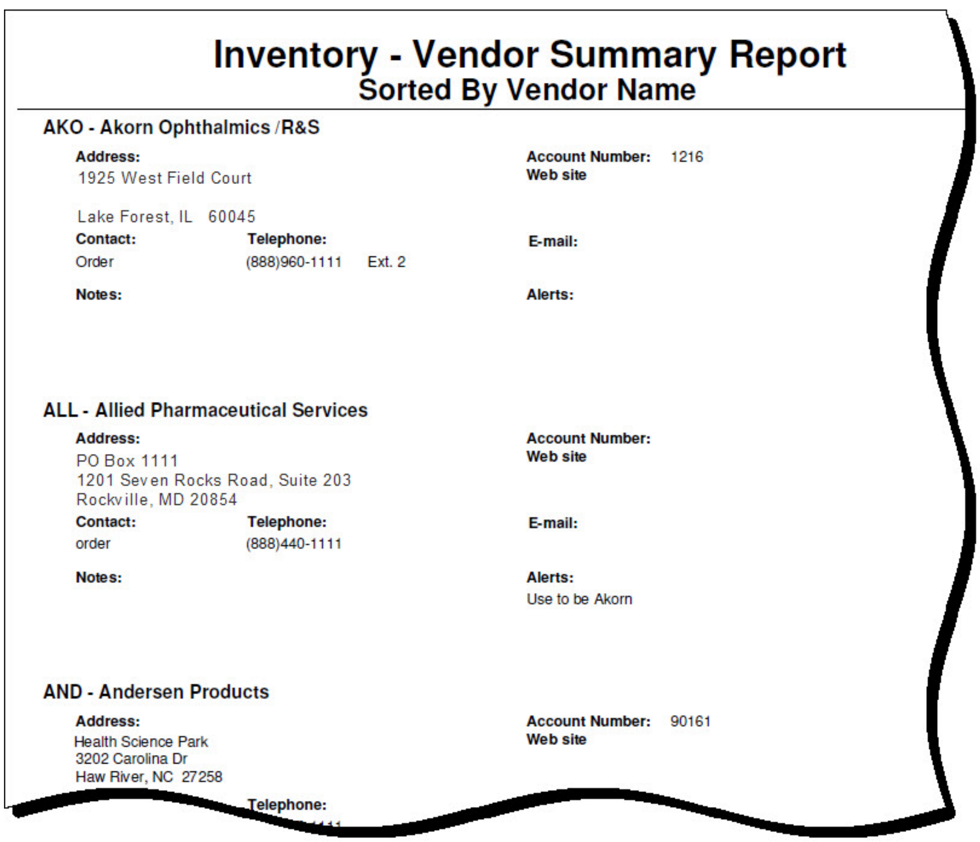
Sort Order	Range
• Vendor Name	• Vendor Name

Report Fields

- Vendor: The unique identifier and description of each vendor.
- Account Number: The vendor's account number.
- Website: The web site of the vendor.
- Contact: The company representative.
- Telephone: The vendor's telephone number.
- E-Mail: The vendor's email address.
- Notes: Any notes on the vendor.
- Alerts: Any alerts set for the vendor.

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Vendor Summary Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Vendor Summary Report**.
5. Click **Run**.
6. On the Inventory—Vendor Summary Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.



Report Title: Inventory—Want List Report

Report Description

Use the Want List Report to view details of items currently on the Want List.

Only items for which you track quantity on hand are included on this report.

Sort Order and Range

Sort Order	Range
• Item Description • Item ID • Primary Vendor	• If **Sort by** is Item Description: Item Description, Item ID, Status • If **Sort by** is Item ID: Item Description, Item ID, Status • If **Sort by** is Primary Vendor: Item Description, Status, Vendor Name

Report Fields

- Item ID: The unique identifier for each invoice item.
- Description: The name of the invoice item (hospital description).
- Group: The item's location group.
- Location: The item's location.
- Quantity on Hand: The item's current quantity on hand (only in sort option Primary Vendor).

Directions to Run the Report

1. On the menu, select **Reports > Inventory**.
2. On the Reports Search window, select **Want List Report**.
3. Click **Create Report**.
4. On the Inventory Reports window, select **Want List Report**.
5. Click **Run**.
6. On the Inventory—Want List Report window, select the sort order.
7. Optional: Select range, if applicable, by entering starting and ending values.
8. Click **OK**.

Inventory - Want List Report
Sorted By Item Description

Item Id	Description	Group	Location	Needed	Reason	Added by	Date	Status	Unit Cost	Total Cost
08129	Bac/Neo/Poly/HC Ointment 3.5g			4.0 tube		James, John		Not Done	$3.2800	$13.12
08642	Advantage Canine Red 21-55lbs			12.0 pack		James, John		Not Done	$23.7300	$284.76
01137	Fel-O-Vax FIV			49.0 dose		James, John		Not Done	$6.1500	$301.35
01147	Feline Bordatella			27.0 dose		James, John		Not Done	$3.0000	$81.00
99998	General Health Profil 2test			177.0 each		James, John		Not Done	$21.0750	$3,730.28
01077	Imrab 3 Rabies Vaccine			92.0 dose		James, John		Not Done	$0.9900	$91.08
01057	Lyme Disease (Borrelia)			101.0 dose		James, John		Not Done	$7.1500	$722.15
01065	Parvo			58.0 dose		James, John		Not Done	$1.2800	$74.24
02102	Pediapred Oral Solution			141.0 cc		James, John		Not Done	$0.2900	$40.89
99999	PresAnes Panel 4Test			54.0 each		James, John		Not Done	$54.5200	$2,944.08
07413	Sentinel White 51 - 100 #			13.0 packa		James, John		Not Done	$40.1000	$521.30
07412	Sentinel Yellow 26 - 50#			10.0 packa		James, John		Not Done	$34.5900	$345.90
	Widget			0.0	Saw in magazine -please	James, John	8/18/2011	Not Done		

Appendix

16 Steps to Inventory Setup

1. **Classifications/Subclassifications (Lists > Invoice Item Class)**
Classifications and subclassifications can be used to categorize invoice items to generate more specific information in reports, markup, or markdown entire groups of similar invoice items, narrow invoice item searches, and create pick lists to use in invoicing. Use this option to add or modify classification and subclassification information.
2. **Departing Instructions (Lists > Departing Instructions)**
Use departing instructions to explain the patient care after treatment, after surgery, or after administering medications or vaccinations. These educational paragraphs recommend needed services and advise when a return visit is necessary. Invoicing an item that has departing instructions linked will automatically print the departing instructions on the invoice.
3. **Prescription Instructions (Lists > Prescription Instructions)**
Setting up prescription instructions includes creating a list of instructions and then linking a specific instruction to an invoice item. You can link one (1) prescription instruction per invoice item.
4. **Units of Measure (Controls > Units of Measure)**
Units of measure are used to designate how invoice items are bought and sold.
5. **Price Change Reasons (Controls > Price Change Reasons)**
Use price change reasons to specify if invoice item prices can be changed. If prices can be changed, your practice can set up codes to track the reasons prices were changed.
6. **Vendor Setup (Inventory > Vendors)**
Set up vendors to manage the ordering source for inventory items, placed orders, and received orders. You can link vendors to an individual invoice item.
7. **Locations (Inventory > Locations)**
Use this feature to designate areas where inventory is being stored. Examples of locations include Pharmacy, Central Storage, Refrigerator A, and Refrigerator B.
8. **Cost Center (Inventory > Cost Centers)**
Use cost centers to track inventory costs associated with specific areas in your practice for items used within your practice but not invoiced. Examples of cost centers include boarding/kennel, lab supplies, expired drugs, breakage, and truck.
9. **Adjustment Reasons (Inventory > Adjustment Reasons)**
Adjustment reasons are used to track adjustments of quantity on hand (QOH) within inventory. Examples of adjustment reasons include broken, cycle count, free sample, unaccounted for, expired, and entry error.
10. **Inactivate Invoice Items Not Used (Lists > Invoice Item)**
Inactivating items not used by the practice will help keep your lists smaller and more pertinent. To inactivate an inventory or service, from the Invoice Item List locate the item and click **Update**. Inventory items must have the **Maintain QOH** check box cleared to be marked as inactive.
11. **Set up Inventory Items (Lists > Invoice Item)**
Setting up inventory items can take a substantial amount of time. Try to pick a category of inventory (e.g., canned foods or antibiotics) and complete the setup of those items. Setup includes buy/sell ratios, reorder information, and marking the item to maintain QOH for tracking purposes. Most of the details on inventory reports include QOH information.
12. **Link Inventory Items (Lists > Invoice Item)**
Inventory items can be linked to services or other inventory items. Linking items can be helpful when you do not want items listed separately on invoices. Examples of inventory items to link include canine and feline vaccination services (should have a dose of the appropriate vaccine linked) and the Heartgard® services (should have a Heartgard product linked).
13. **Receive Past Invoices (Inventory > Receipt List)**
Enter past invoices from the vendors to allow your facility to see receipt and cost history for the items.
Warning: DO NOT input past invoices after a physical count has been adjusted in the Cornerstone software, because receiving orders will add to the current quantity on hand.

14. **Cycle Count**
    Physically count the inventory items marked to maintain quantity on hand.
15. **Adjust Quantity on Hand, Cost, and/or Expiration Dates (Inventory > Adjustment List)**
    When you've completed taking a physical inventory, adjust the quantities on hand, cost, and expiration date information.
16. **Set Up IDEXX SmartOrder***
    Read the "IDEXX SmartOrder* Inventory Solution" on page 63 for set up information.

Inventory Security Settings

View a snippet online demonstration

Security access to inventory features in the IDEXX Cornerstone* Practice Management System should be set up before establishing inventory settings and working in inventory. Security for inventory is set in Cornerstone and can be located on the menu bar at **File > Security Setup**. In the following grid you will find a listing of all the inventory security settings, access suggestions, and the path to locate that feature. It is ultimately the practice's decision-maker who decides who has access to certain areas within the inventory features. (Key: GEN = General Login, REC = Receptionist, DR = Doctor, TECH = Technician, and M/O = Managers/Owners). For security settings to take effect, you will need to close out of Cornerstone and reopen.

This document contains suggested security setting for General Login (GEN), Receptionists (REC), Technicians (TECH), Doctors (DR), and Managers/Owners (M/O). However, it is ultimately the practice's decision-maker that decides who needs access to certain areas within Cornerstone, and IDEXX shall not be liable for any actions arising from those security decisions.*

Security settings in additional areas, such as Practice List security settings, must also be established.

Cornerstone Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Inventory	X	X	X	X	X	Inventory
Inventory—Adjustment List					X	Inventory > Adjustment List
Inventory—Adjustment Reason List					X	Inventory > Adjustment Reasons
Inventory—Adjustment Reason Maintenance					X	Inventory > Adjustment Reasons
Inventory—Backorder List					X	Inventory > Backorder List
Inventory—Backorder Maintenance					X	Inventory > Backorder List
Inventory—Cost Adjustment Maintenance					X	Inventory > Adjustment List > New Cost Adjustment
Inventory—Cost Center List					X	Activities > Inventory > Settings > Cost Centers
Inventory—Cost Center Maintenance					X	Inventory > Cost Centers
Inventory—History Purge					X	Tools > Inventory Purge
Inventory—Internal Stock Use					X	Inventory > Internal Stock Use
Inventory—Inventory Details	X	X	X	X	X	Various Locations: Invoice, PVL, Whiteboard, Prescriptions, etc.
Inventory—Inventory Reports					X	Reports > Inventory
Inventory—Item History and Item Information					X	Inventory > Item History and Item Information Tab
Inventory—Location Group List					X	Inventory > Location Group
Inventory—Location Group Maintenance					X	Inventory > Location Group
Inventory—Location List					X	Inventory > Locations
Inventory—Location Maintenance					X	Inventory > Locations
Inventory—Location Type List[1]	X	X	X	X	X	Inventory > Location Types
Inventory—Location Type Maintenance					X	Inventory > Location Types
Inventory—Order List					X	Inventory > Order List
Inventory—Order Maintenance					X	Inventory > Order List
Inventory—Purchasing Work List					X	Inventory > Purchasing Work List
Inventory—QOH Adjustment Maintenance					X	Inventory View Quantity on Hand
Inventory—Receipt List					X	Inventory > Receipt List

Cornerstone Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Inventory—Receipt Maintenance					X	Inventory > Receipt List
Inventory—Return to Vendor					X	Inventory > Return to Vendor
Inventory—Stock Transfer List					X	Inventory > Stock Transfer List
Inventory—Transfer Items					X	Inventory > Transfer Items
Inventory—Vendor List					X	Inventory > Vendors
Inventory—Vendor Maintenance					X	Inventory > Vendors
Inventory—View Quantity on Hand	X	X	X	X	X	Inventory > View Quantity on Hand
Inventory—Want List	X	X	X	X	X	Inventory > Want List

Cornerstone Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Inventory—Adjustment Report					X	Reports > Inventory > Inventory—Adjustment Report
Inventory—Audit Open Details Report					X	Reports > Inventory > Inventory—Audit Open Details Report
Inventory—Audit Report					X	Reports > Inventory > Inventory—Audit Report
Inventory—Backorder Report					X	Reports > Inventory > Inventory—Backorder Report
Inventory—Cost Report					X	Reports > Inventory > Inventory—Cost Report
Inventory—Cost Totals Report					X	Reports > Inventory > Inventory—Cost Totals Report
Inventory—Counts Report					X	Reports > Inventory > Inventory—Counts Report
Inventory—Evaluation Report					X	Reports > Inventory > Inventory—Evaluation Report
Inventory—Expiration Date Report					X	Reports > Inventory > Inventory—Expiration Date Report
Inventory—Internal Usage Report					X	Reports > Inventory > Inventory—Internal Usage Report
Inventory—Item Vendor Information Report					X	Reports > Inventory > Inventory—Item Vendor Information Report
Inventory—Items Profit Analysis Report					X	Reports > Inventory > Inventory—Items Profit Analysis Report
Inventory—Linked Items Report					X	Reports > Inventory > Inventory—Linked Items Report
Inventory—On Order Report					X	Reports > Inventory > Inventory—On Order Report
Inventory—Overstock Report					X	Reports > Inventory > Inventory—Overstock Report
Inventory—Partial Receipts Report					X	Reports > Inventory > Inventory—Partial Receipts Report
Inventory—Purchase History Report					X	Reports > Inventory > Inventory—Purchase History Report
Inventory—Receipt Report					X	Reports > Inventory > Inventory—Receipt Report
Inventory—Reorder Report					X	Reports > Inventory > Inventory—Reorder Report
Inventory—Returns Report					X	Reports > Inventory > Inventory—Returns Report

Cornerstone Reports Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Inventory—Setup Error Report					X	Report will automatically display when an error occurs.
Inventory—Turnover Report					X	Reports **>** Inventory **>** Inventory—Inventory Turnover Report
Inventory—Usage Tax Report					X	Reports **>** Inventory **>** Inventory—Inventory Usage Tax Report
Inventory—Vendor Summary Report					X	Reports **>** Inventory **>** Inventory—Inventory Vendor Summary Report
Inventory—Want List Report					X	Reports **>** Inventory **>** Inventory—Want List Report

Skill Assessment and Evaluation

Initiating Inventory Management
Skill Assessment

Practice Name: ____

Your Name: ____

Completion Date: ____

Instructions: After completing your training, please read each of the following skill assessment statements and evaluate your ability to perform each task in the IDEXX Cornerstone* Practice Management System.

Mark only one X for each skill statement.

	Can Perform	Can Perform but NOT Using	Cannot Perform	Not Applicable
Introduction				
1. I can access Help.				
2. I can locate Cornerstone reference manuals.				
3. I can access online customer support.				
Getting Started: Phases and Setup				
4. I can understand the inventory workflow.				
5. I can list inventory decisions that need to be made prior to invoice item inventory setup.				
6. I can access Cornerstone inventory.				
7. I can add/modify vendors.				
8. I can add/modify locations.				
9. I can add/modify cost centers.				
10. I can add/modify adjustment reasons.				
11. I can perform modifications to multiple inventory items at one time (reorder information, track expiration dates. or lot numbers).				
12. I can perform modifications to individual inventory items (buy/sell ratio, maintain QOH, reorder information, etc.).				
13. I can link vendor IDs to inventory items.				
14. I can maintain inventory defaults.				
Purchase				
15. I can add an item to the Want List.				
16. I can use the **Suggested Items** check box on the Purchasing Work List to view inventory items that need to be reordered.				
17. I can perform a basic search for an inventory item.				
18. I can perform an advanced search for an inventory item.				
19. I can arrange and adjust the columns on an Inventory window.				
20. I can view Item History and Item Information for an inventory item.				
21. I can delete an item from the Want List.				
22. I can use the Purchasing Work List to add an item to a purchase order.				
23. I can create a purchase order using the Order List.				
24. I can create an order using IDEXX SmartOrder*.				
25. I can modify a purchase order using the Order List.				

	Can Perform	Can Perform but NOT Using	Cannot Perform	Not Applicable
Receive				
26. I can add a new receipt.				
27. I can modify an inventory receipt.				
28. I can reconcile unmatched orders.				
29. I can edit a back ordered item.				
30. I can post an inventory receipt.				
31. I can return inventory to a vendor.				
Deplete/Adjust/Move				
32. I can edit quantity on hand.				
33. I can edit lot numbers and expiration dates.				
34. I can adjust quantity on hand for the Adjustment List.				
35. I can adjust the cost for an inventory item.				
36. I can deplete internal stock.				
Inventory Reports				
37. I can preview and print an inventory receipt.				

Results of the Skill Assessment

_____ Can perform

_____ Can perform but not using

_____ Cannot perform

_____ Not applicable

Please return this skill assessment using one of the following methods:

<u>Return this information to</u>:
Cornerstone Education Department at CornerstoneCoach@idexx.com.

<u>Mail this information to</u>:
IDEXX Laboratories
Attn: Cornerstone Education Department/Gina Toman
One IDEXX Drive
Westbrook, Maine 04092

Initiating Inventory Management Evaluation

We value your opinion! Tell us what you think about the
Cornerstone Initiating Inventory Management course.

Practice: ______________________________ Date: ________________

Trainer: ______________________________

Feedback received from you regarding the training is vital to our continued improvement.

Course Description

During this five-hour course, inventory managers from practices who are just starting Cornerstone inventory management will learn basic inventory management capabilities, be introduced to a decisions and setup checklist, and then learn how to complete basic purchase, receipt and other important inventory transactions in their real practice data files. Key training components are:

- Getting Started Phases and Setup
- Purchase
- Receive
- Deplete/Adjust/Move
- IDEXX SmartOrder*
- Inventory Reports

1. How likely would you be to recommend an IDEXX Cornerstone course to a friend or colleague?

1 Not Likely.. Likely 10

1	2	3	4	5	6	7	8	9	10
O	O	O	O	O	O	O	O	O	O

2. For us to better understand the opinions of our participants, please explain why you selected the rating above?

3. The prerequisites for this course are:

- The current version of Cornerstone installed at the practice.
- Basic Cornerstone navigation.

Indicate which participants were ready for, and met the prerequisites for, this course.
Please select all that apply.

O Our practice O All other practices O Some other practices

4. How was the length of the course?

- O Too short
- O Too long
- O Just right

Additional comments:

5. Referring to the items listed below, did we meet your expectations for the following:	**No** 1	2	3	4	5	6	7	8	9	**Yes** 10	N/A
The course content matched the course description.	O	O	O	O	O	O	O	O	O	O	O
The course materials were professional looking.	O	O	O	O	O	O	O	O	O	O	O
The course materials provided contained valuable content.	O	O	O	O	O	O	O	O	O	O	O
The trainer arrived well prepared and used appropriate examples.	O	O	O	O	O	O	O	O	O	O	O
The trainer used effective communication skills.	O	O	O	O	O	O	O	O	O	O	O
The trainer answered all of my questions effectively.	O	O	O	O	O	O	O	O	O	O	O
As a result of this course, we can expand our use of Cornerstone's features.	O	O	O	O	O	O	O	O	O	O	O
This course provided a good value for the cost.	O	O	O	O	O	O	O	O	O	O	O

Additional comments:

6. Did you follow along with the participant workbook during the course presentation?

- O **Yes**—I followed the workbook the majority of the time.
- O **No**—I didn't use the workbook.
- O **Sometimes**—I used the workbook some, but not most, of the time.

If **No** or **Sometimes**, why not?

7. **What was the most valuable aspect of this course?**

8. **What suggestions do you have for future revisions of this course?**

9. **Using the roles listed, count and record how many participants (from your practice) attended some or all of this course.** *If someone holds more than one of these roles, record their primary role only*.

Primary Roles	Number of participants with this primary role that attended this course
Veterinarian	
Technician or nurse	
Reception or client services	
Office, practice, or business manager	
Practice owner	
Other *(List role and record number)*	
Other *(List role and record number)*	

Thank you! We appreciate your feedback.

Testimonial Permission:

(Please check the box below)

☐ Please have an IDEXX Computer Systems representative contact me to discuss featuring my comments in promotional materials.

Please Print:

Your Name: ____________________

Practice Name: ____________________

Practice City, State: ____________________

Practice Telephone #: ____________________

Reminder: Please return this evaluation using one of the following methods:

Return this information to:
Cornerstone Education Department at CornerstoneCoach@idexx.com.

Mail this information to:
IDEXX Laboratories
Attn: Cornerstone Education Department/Gina Toman
One IDEXX Drive
Westbrook, Maine 04092

IDEXX LABORATORIES