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.

This guide will introduce you to the key things you need to know to implement IDEXX SmartOrder at your practice.

**Prerequisites:**

- You need to be familiar with the inventory feature and have it set up in your Cornerstone system. You should also be familiar with the process of running inventory reports.
  - If you haven’t started using inventory, we recommend the [Cornerstone Coach: Initiating Inventory Management](#) course. For more information, click the link or call your IDEXX Cornerstone Sales Representative at 1-800-283-8386.
- You need to have an account with MWI and have online ordering activated.
  - Contact your MWI representative to setup an MWI account (if your practice does not have one) and to activate online ordering. To contact your MWI representative, visit [mwivet.com](http://mwivet.com) or call 1-888-562-3405.
- To connect IDEXX SmartOrder with the MWI online inventory ordering system, you must complete a one-time setup to enter your account information in Cornerstone and to agree to the terms and conditions of use for MWI.
- You’ll need Internet Explorer® 7 or higher on each workstation and a consistent, high-speed Internet connection. (Internet Explorer does not need to be your default browser.)

**Setting up the IDEXX SmartOrder inventory solution**

**Assign items to vendor information—before you order**

To use IDEXX SmartOrder, you need to assign (link) Cornerstone inventory items you order to the vendor’s ID numbers for those items. The most efficient way to prepare for IDEXX SmartOrder is to assign 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 the process of assigning vendor item IDs (SKUs) to these Cornerstone inventory items.

1. Create a list of the inventory items you use most frequently:
   - If you have been ordering from mwivet.com, you can run a report at mwivet.com that shows all the items you have ordered, for either a set period, or in total. For further instructions, contact your MWI representative at [mwivet.com](http://mwivet.com) or call 1-888-562-3405.
   - In Cornerstone, run one or both of the following reports:
     - **Inventory—Purchase History**, which shows what you’ve purchased for a specific period:
       - Sort by item description.
     - **Inventory—Vendor Information**.
b. Set the report range by date, and select beginning period and ending period to cover a year.

c. Click Preview.

d. Select Save as, then select .csv and click OK.

e. Open the file in a spreadsheet program like Microsoft Excel, and filter and sort by vendor, and then by item quantity.

   o **Inventory—Receipt Report**, which shows vendor and purchase history for a specific period:
     a. Sort by vendor by receipt.
     
     b. Set the report range by date, and select a beginning period and ending period to cover one year.
     
     **Note**: If you have been purchasing items from MWI, you may want to add an additional range to filter by vendor name.

     c. Click Preview.

     d. Select Save as, then select .csv and click OK.

     e. Open the file in a spreadsheet program like Microsoft Excel, and filter and sort by item quantity.

2. On the menu bar, select Lists > Invoice Item.

3. To limit the list to inventory items, select **Inventory items** and clear all the other check boxes in the **Include** area.

   or:

   To search for a specific item, select **Description** or **Item ID** in the **Search by** area, and fill in the corresponding box in the **Invoice item information** area.

4. For each item that you want to assign:

   a. Select the invoice 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, press F2 or double-click to select from a list.

     **Note**: Verify that the **Primary** field for this item line has a green check mark, and click the field if it isn’t already checked—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.

     **Note**: If you created a Product Purchase 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, on the **Inventory** tab, 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 4 until you’ve assigned 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 whether or not you have assigned the item to an MWI vendor item ID.

   **Note**: 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 bar, select the line for MWI, and click Edit. If you make any changes, click Save.
Assign an item to vendor information—while ordering

We recommend that you set up most of your invoice items before you order, but you can also assign (match) additional items while ordering.

When you are creating a purchase order, if an invoice item is not assigned to an MWI vendor item ID in Cornerstone, that line is highlighted with a yellow background and an alert message appears. Use the following process to add a vendor Item ID from the Create Purchase Order window or the Purchase Order View window.

1. Double-click the item’s description. The Suggested Item List dialog box opens.
   The items that are the closest match to the description for the Cornerstone invoice item are highest in the list.
2. If the list is too large or you are unable to locate the appropriate item, edit the Description field to make it more precise, and click Search again.
   Tip: Including a specific measurement can help to narrow your search results.
3. Select the appropriate MWI item ID match for the Cornerstone invoice item.
4. Click OK to close the Suggested Item List dialog box. You return to the window where you started.
5. The MWI vendor item ID is applied to the Cornerstone item. This item will now be available for online ordering from Cornerstone in the future.

Reassign an item when vendor information changes

Occasionally, a vendor may change the SKU (ID number) it uses for an item. When this happens, the item will be highlighted. To update the SKU assignment:

1. Follow steps 2–5 in the “Assign items to vendor information—before you order” process above.
2. When you reach step 4.d., type the new SKU in the Vendor item ID box.

Using the IDEXX SmartOrder inventory solution

IDEXX SmartOrder work flow overview

1. Begin by creating a purchase order from either the Purchasing Work List or Purchase Order List windows.
   Note: Many of the inventory windows have been updated in Cornerstone 8.3 with a new look and feel, including new labels and text, sort options and show/hide column settings for displaying invoice item grids.
2. Place your order.
3. Track the status of the order on the Purchase Order List window.
4. When the order arrives:
   a. Open the purchase order in Cornerstone and receive it.  
      **Note:** If the order was placed outside of Cornerstone, Cornerstone tracks it as an external (unmatched) order. We recommend reconciling external orders so that you can use them within the IDEXX SmartOrder work flow. (See the next section for details.)
   b. Review the order for completeness and update statuses on the purchase order accordingly.
   c. Post.

**Reconciling orders you place outside of Cornerstone (unmatched orders)**

IDEXX SmartOrder also lets you track orders that you place with MWI without using Cornerstone. This kind of external order is listed in the Cornerstone software as an unmatched purchase order. We recommend that you reconcile the external 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 search results table.
   
   All invoice items that display **unmatched** in the Inventory Item ID field must be assigned (matched) to Cornerstone inventory item IDs for the order to be reconciled and created. If all items are assigned, go to step 4.

3. For each unmatched item, do the following:
   - If you know the item ID, double-click the appropriate inventory item line in the **Line items for...** table, and type the item ID in the **Inventory Item** box. Go to step 4.
   - If you don’t know the item ID:
     a. Double-click the appropriate inventory item line in the **Line items for...** table, and then 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.  
        **Tip:** Select MWI in the **Vendor** drop-down list to see only MWI items.
     c. If the item you want is in results, select it and click **Select**. The Search for Inventory Item window closes. Continue with step 4.
     d. If the item you want is not in the results, click **Add an item** at the bottom of the window.
     e. Fill in the **Item ID**, **Description**, **Classification**, and **Unit of Measure** boxes.
     f. Leave the **Vendor** and **Vendor Item ID** boxes empty.
     g. Click **Save**. This item now appears in the search results table above.
     h. Select the item in the search results table and click **Select**. The Search for Inventory Item window closes.

4. On the Unmatched Purchase Orders window, press **TAB** to save the ID in the **Inventory Item** field.
5. When you have assigned all line items to Cornerstone inventory items, click **Save**. The Unmatched Purchase Orders window closes. A pop-up window informs you that the purchase order has been created and lists the purchase order number.
6. Click **OK**, 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.

**Note:** 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 orders.

You have two options:

- Reconcile the external order so that you can receive against it, and delete or close the original Cornerstone purchase order (on the Purchase Order List window). In most cases, this is the preferred option, because the external order reflects the items that were actually ordered.
  
  **Note:** If an order has a status of **Not sent**, you can delete it. If the order has a status of **Sent**, closing it will cancel the order.

- Use the original Cornerstone Purchase Order to receive against and post. If you typically reconcile external orders, delete the external order (on the Unmatched Purchase Orders window) because it is now a duplicate.

**FOR MORE INFORMATION**

- For detailed information about electronic inventory ordering, see the **Inventory > Electronic Inventory Ordering** section of the Cornerstone® Help.
- To access the snippet online demonstrations directly, and to access additional snippets about inventory, go to idexxlearningcenter.com.
- To contact your MWI representative, visit [mwivet.com](http://mwivet.com) or call 1-888-562-3405.