Inventory Management

IMPROMED®

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Inventory Overview

Below is an outline identifying the order or process of managing your inventory. This guide covers the steps to setup screens, reports, and the Inventory module.

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Inventory Category Setup

The Inventory module uses categories to organize all inventory items. Each inventory item that is added to the Impromed program must be placed in an inventory category. Properly categorizing inventory allows to better track inventory cost-to-profit ratio.

Creating an Inventory Category

From the Desktop:

1. Click ![icon] > **Setup > Inventory > Inventory Categories**. The Setup Inventory Categories dialog box opens.
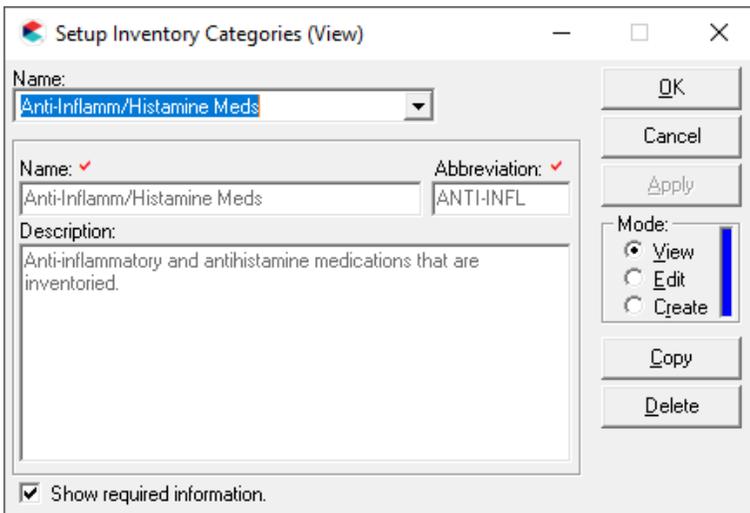
2. Click **Create** for Mode.
3. Enter a **Name** for the inventory category.
4. Enter an **Abbreviation** for the inventory category.
5. Enter a **Description** for the inventory category.
6. Click **Apply** to save the new inventory category and keep the dialog box open, or click **OK** to save the inventory category and close the dialog box.

The inventory categories are assigned to each inventory item.

Setup Products and Inventory Items

Creating Product Items

The following is going to walk operators through editing or creating a product item (invoice item). Product Items are maintained using the Setup Products dialog box.

1. Click > **Setup > Products > Product Items**.

2. Click the **Create** mode button.

3. Select or enter all of the appropriate information on the **General** tab.

   a. Enter a **Product Name**. *When adding products to Estimates/Invoices/Compliance Lists/ Treatment Plans, this is the name that is displayed.*

   b. Enter a **Product Code**. *Can be used to find your products.*

   c. Enter a **Product BarCode**. *If you are using scanners, place the UPC code here.*

   💡 **If you want to use a BarCode scanner to add items to an invoice, this is where you can place the UPC of the item.**

d. Enter a **Unit of Measure**.

e. Enter any desired **Comment**(s), up to 50 characters.

> **Labeling products with a comment provides advanced functionality for selecting products using the Product Spreadsheet.**

f. Click **Product Category** drop-down arrow to assign the product to a product category. *Product Categories are going to be the most detailed grouping of products as well as the most used by Impromed operators. A few examples are Antibiotics, Dentistry, Vaccinations, Surgery - Reconstructive, etc.*

g. Click the **Profit Center** drop-down arrow to assign the product to a profit center. *Profit Centers are considered the broadest grouping of products. Some examples of profit centers are Pharmacy, Surgery, Boarding, Laboratory, etc.*

h. Click the **Product Type** drop-down arrow to assign the product to a product type. *Product Types can be anything as a grouping of products, product types can be similar to the following: Professional Services, Foods, Injectables, etc.*

i. Click the **Discount Type** drop-down arrow to select a discount type. *Discount types are components of discounts. Each discount is made up of at least one discount type.*

j. If desired, click the **Treatment Plan** drop-down arrow to assign the product to a treatment plan section. *Section Names allow operators to have their own Treatment Plan categories for items added.*

> **It is also possible to rename the treatment plan sections from this area by clicking Rename, entering the new name for each portion of the plan, and clicking OK.**

k. Click the **Sale Tax** drop-down arrow to apply a sales tax when the product is invoiced.

l. Click the **Internal Usage Sales Tax** to apply a fee for product usage by staff.

> **Products can have both Sales and Internal Usage Sales Taxes applied. Impromed automatically calculates each tax depending on the product pricing.**

m. Set the desired **Preferences** to assign to this product item.

1) If the client is Tax Exempt, select **The Sales Tax is Not applied if the client is Tax exempt**.

2) To allow discounts, select **Discounts may be applied to the price of this product**.

3) To invoice the product as $0, select **The Selling Price of the $0.00 is allowed for this product**.

4) To have the product print on the invoice, select **This product will be printed on the Invoice**.

5) To have the product print on the estimate, select **This product will be printed on the Estimate**.

6) To force operators to choose a patient before the product may be added to an invoice, select **Requires a patient to be selected**.

7) To view the product within the current business, select **Available for use at this practice**.

n. Select whether properties of the product may be changed when **Adding** or **Modifying** the product. *This means that operators may or may not change the values when adding or modifying products in Estimates, Invoicing, Treatment Plans, and Compliance Lists*.

o. Select any **Additional Action** to invoke when this product is added to an invoice.

1) To prompt the operator to enter prescription label information and print a prescription label for the product, select **Generates a New Prescription Item**.

2) To prompt the operator to select a surgery object to link the product to and places a Service History object in the patient medical record, select **Link to an existing Medical Records Surgery Item**.

3) To prompt the operator to select a radiograph object to link the product to and places a Service History object in the patient medical record, select **Link to an existing Medical Records Radiograph Item**.

4) To set the product quantity equal to the product timer used either in the Boarding, Treatment Plan, or Invoices, select **Quantity is determined by the Product Timer**.

5) To set the product quantity equal to the number of days in the reservation, select **Quantity is determined by the # of days in the Boarding Reservation**.

4. Select or enter all of the appropriate information on the **Pricing** tab.

a. Use the **Inventory Name** drop-down arrow to associate the product with an inventory item.

b. Enter the **Quantity** to remove from inventory for each single unit sold.

Example: If you are selling canned dog food, some client's might purchase a single can or they might purchase the whole case. Impromed can handle both in multiple ways, one of which suites your business' needs. When you receive inventory, you want to make sure that you receive it according to how you are going to sell it so when configuring your quantity to remove, your inventory will be subtracted correctly. You can have a single product for your canned dog

food, therefore, the quantity to remove would be 1. This means that if a client purchases a case of canned dog food, your staff needs to enter the quantity of 24 when invoicing. You can have multiple products removing inventory from one inventory item. This means that you can have a product for a single can of dog food, and a product for a case of canned dog food. One product would be set to remove 1 and one would be set to remove 24. When invoicing, your staff would then choose the appropriate product for the quantity of the purchase.

    c. Enter the **Base Cost (For Pricing)** figure.

    d. Enter the **Round final Selling Price**. *This rounds up the price.*

    e. Set the quantity **Decimal** value.

If you are using a liquid item which could be used in 0.5 milliliters or 0.25 milligrams, you will need to enter at least 1 or 2 for the Number of Decimals.

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    f. To **Multiply the Minimum Price by the Selling Quantity** select the option.

Example: Let's say the item is $15 normal price, $10 minimum price, $10 base cost. If you give someone a 50% employee discount , the item would be $7.50, but rounded up to $10 because of the minimum price. However, if they buy 4 of them, the price would be $30 (4 X 7.50). If they have that box checked however, the price would be $40 (4 X minimum price of $10) and would save them the $10 loss. It has the same effect as invoicing 4 separate products.

    g. Select if the **Price remains fixed when the product Unit cost changes**.

        1) If **NO**, manually set the markup. *This automatically sets the Unit Price.*

        2) If **YES**, manually set the unit price. *This automatically sets the Markup.*

    h. Each product may have up to five quantity discounts. The discount is based on a quantity that is less than or equal to the value entered. Enter the high value for the discount range to create.

Example: If the first discount is for 6 to 10 units, enter a value of 10.

    i. Set the markup or unit price for the invoice and low estimate price depending on the selection in step e.

    j. Set the markup or unit price for the high estimate price.

    k. Repeat steps **h - j** for the next quantity discount if necessary.

    l. To apply a **Temporary Discount**, set the discount percentage.

    m. To set a **Minimum Price**, set the dollar amount.

    n. To apply a **Packaging Fee**, set the dollar amount.

    o. To set a default **Quantity**, set the quantity.

5. Select all of the appropriate information on the **Employees** tab. *Allows a business to have products invoiced by specific employees.*

6. Enter all of the appropriate information on the **Notes** tab. *Allows product notes and withdrawl values to be entered as defaults for each product.*

7. Enter all of the appropriate information on the **Images** tab. *Allows images to be associated with products.*

8. Select all of the appropriate information on the **Patients** tab. *Allows product restrictions to limit what patients the product may be invoiced to.*

9. Enter all of the appropriate information on the **Info** tab. *Allows general information about the product to be added.*

10. Select or enter all of the appropriate information on the **Treatments** tab. *Allows for treatment plan defaults to be established.*

11. Click **Apply** to save the changes and keep the dialog box open or click **OK** to save the changes and close the dialog box.

Using the Product Spreadsheet

The Product Spreadsheet allows operators to modify the properties of several Products, Inventory Items, or Bundle Components at once. The instructions provided here are designed to help in the process of making mass changes to products, inventory, and bundle items. However, it is possible to go into this sheet and change items individually. Simple double-click on the setting to alter, and make the appropriate change.

1. Click > **Setup > Products > Product Spreadsheet.**

2. Click the tab containing the items to modify (**Products, Bundle Components, Inventory**).

3. Select the items to modify using the **Selection Options** and clicking **GO**.

4. From the **Actions** list, select the action to perform to modify the selected items, then click **GO**.

5. Click **Apply**. The selected items are modified.

6. Click **OK**.

> 📄 If you discover that you have made an error while attempting to make changes to your products, do NOT press Apply or attempt to make corrections. Click Cancel and then reopen the Product Spreadsheet and begin again.

Creating Inventory Items

Impromed maintains two separate lists for inventory items and products. Inventory items are items that are received from vendors. Products are items that are sold to clients. Physical products that are sold and services that are administered are both referred to as "products" in the Impromed program. Once an inventory item is created, it must be linked to a product so that each time the item is sold, it is removed from your on-hand inventory.

1. Click ⬡ > **Setup > Inventory > Inventory Items**.
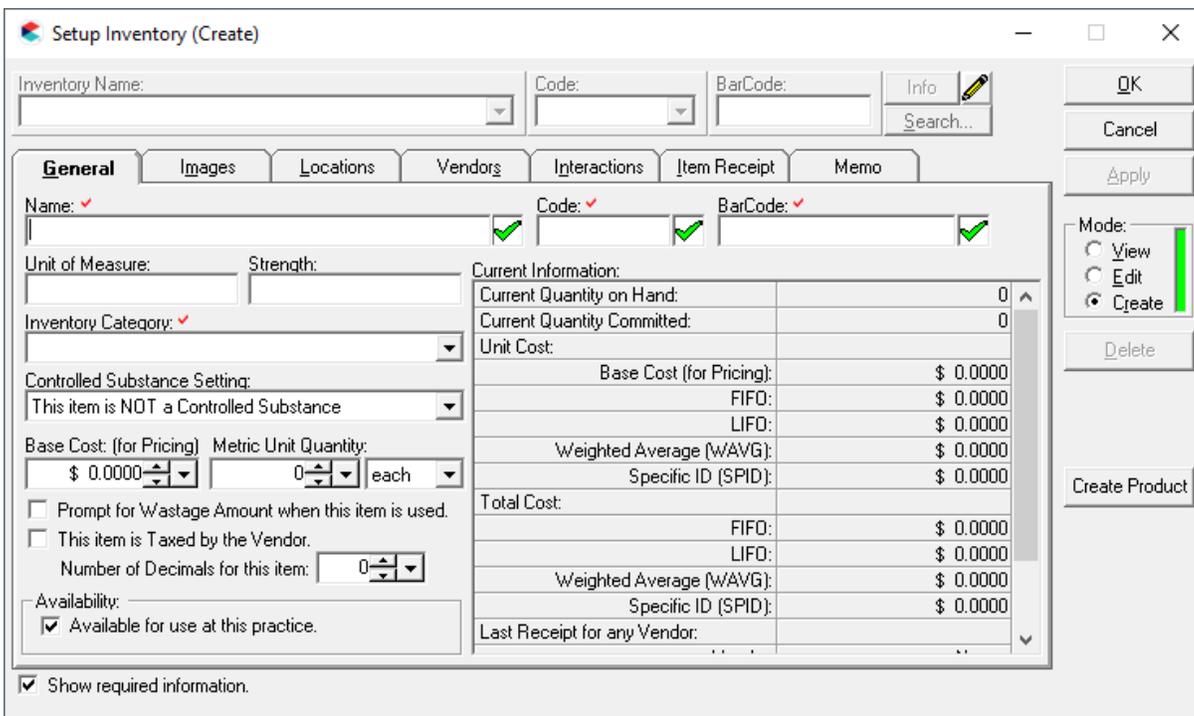
2. Click the **Create** mode button.

3. Select or enter all of the appropriate information on the **General** tab.

   a. Enter a **Name**.

   b. Enter a **Code**.

   c. Enter a **BarCode**, if necessary.

d. If appropriate, enter a **Unit of Measure**.

e. If appropriate, enter a **Strength**.

f. Click the **Inventory Category** drop-down arrow to select the appropriate category for the item.

g. If this is a controlled substance, click the **Controlled Substance Setting** drop-down arrow to enter which schedule to use.

h. Enter the **Base Cost**. *Base cost is a value that is used as the basis for calculating the item's selling price. It is not necessarily the cost paid for the item by the business.*

i. If appropriate, enter a **Metric Unit Quantity**.

j. Check box **Prompt for Wastage Amounts**, when necessary.

When this Inventory Item is used, you will be prompted for a wastage amount. If a quantity of 5 is administered to the animal, and 3 of it is wastage, they are NOT added together for a total of 8. The quantity removed from your system is 5.

k. If you are charged tax by your vendor, select **This item is Taxed by the Vendor**.

l. Set the **number of decimals** for this item.

m. Set the **business availability** for this item.

4. Enter all of the appropriate information on the **Images** tab. *Allows images to be associated with inventory items.*

5. Enter all of the appropriate information on the **Locations** tab. *Each inventory item may be stored in one or more designated inventory storage locations. Each storage location where items are kept can be set up with independent quantity and reorder levels. Storage locations can be associated with an inventory item when the item is first created, or by editing the item.*

a. Click **Modify**. *The Setup Location dialog box opens.*

b. Click **Edit** for mode.

c. Using the **Storage Location** drop-down list, choose a Storage Location to modify.

d. Set the **Maximum Level** value. *The Maximum Level is the largest amount of the Inventory item to have on hand.*

e. Set the **Reorder Level** value. *The Reorder Level is the level at which to contact the distributor about purchasing more of the item in order to insure there are always items in stock.*

f. Set the **Safety Level** value. *The Safely Level is a number slightly lower than the Reorder Level. The Safety Level is used as a warning that the stock of the inventory item in question is almost totally depleted.*

g. Set the **Reorder Quantity** value. *The Reorder Quantity is the amount of the item used to reorder so as not to go over the maximum level.*

h. If this item is being stored at more than one location, click **Apply** to save the changes.

i. Repeat for each additional location where this item will be stored.

j. Click **OK**.

6. Enter all of the appropriate information on the **Vendors** tab. *Allows vendors to be associated with inventory items.*

7. Enter all of the appropriate information on the **Interactions** tab. *Allows interactions to be set for warnings to appear when a conflict may arise during invoicing when the inventory item is linked to products.*

8. Enter all of the appropriate information on the **Item Receipt** tab.

a. Using the **Employee** drop-down, choose the employee creating the inventory item.

b. Using the **Vendor** drop-down, choose the vendor who shipped the item or the most commonly used vendor.

c. Enter the item's **NDC (National Drug Code) Number,** if appropriate.

d. Enter the item's **Expiration Date**.

e. Double-click the **Quantity on Hand** for each Storage Location and enter the current amount.

9. Enter all of the appropriate information on the **Memo** tab. *Allows general information about the inventory item to be added*.

10. Click **Apply** to save the changes and keep the dialog box open.

11. The **BarCodes** tab can associate multiple bar codes to the same inventory item. *This also has effects on invoicing these inventory items when scanning bar codes (if scanners are used) because any of the associated bar codes will pull up this inventory item.*

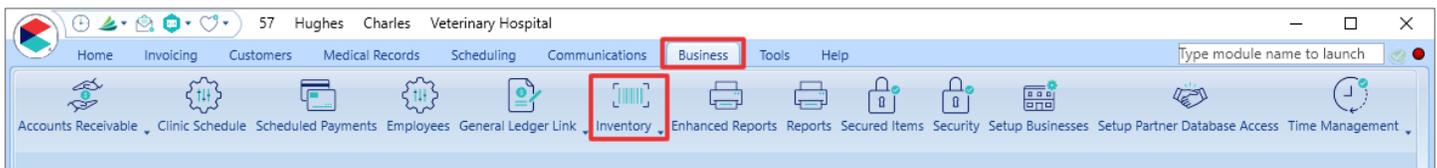12. Click **OK** to save the changes and close the dialog box.

Inventory Module

Using Impromed to maintain inventory can save a business time and money. The Inventory module includes tools for creating and tracking purchase orders, receipt of items, items returned to vendors, viewing purchase history, adjusting base cost of items, and maintaining a want list for re-ordering inventory items.

The module also includes options for managing inventory at multiple storage locations for single or multiple businesses. The system can be set up to display various inventory alerts when inventory quantities are reduced or increased outside of specified levels. It also allows for several methods for pulling stock from inventory, as well as calculating the cost of inventory, and recognizing committed inventory.

Most businesses follow basic rules to help manage their inventory. In most cases, the actual use of the inventory items is completely different than the method used to calculate the cost of inventory for accounting purposes. Most businesses rely on the placement of the inventory items to help determine which inventory items are sold at any given time.

The Inventory screen contains several tabs for accessing different module functions. Each of these tabs can be secured to restrict their use.

Two ways to open the Inventory module: click the **Business** tab on the Ribbon and click **Inventory**.

Or, click > **Modules > Inventory**.

The Inventory Module opens as shown on the following page.

Purchase Orders

On the Purchase Orders tab in the Inventory module, you can view purchase orders by business and/or vendor. Purchase orders can be filtered from Display by choosing All, Only Open, Only Closed, or Intelligent Inventory.

When All purchase orders are displayed, note the Status (ST) icon:

⬤ - Open purchase orders

🔴 - Closed purchase orders

🟡 - Open purchase orders from Intelligent Inventory

🔴 - Closed purchase orders from Intelligent Inventory

Unresolved Items - if a purchase order has a red highlight in the Unresolved Items column, these are purchase orders with items that have not been linked to an item in Impromed.

Creating a Purchase Order

Create a purchase order for use with any distributor that is set up in the vendor list. If the distributor has not been added to the vendor list, add it before a purchase order is created.

1. On the **Purchase Orders** tab in the Inventory Module, select a vendor to create a purchase order for using the **Vendor Name** drop-down list.

2. Click **Add**.

3. Choose a **Contact Name** from the drop-down list, if necessary.

4. Select the **Employee Maintaining this Purchase Order** using the drop-down list.

5. Change the **Date Ordered**, if necessary.

6. Enter the **Estimated Arrival Date**.

7. Enter the **Vendor's P.O. Number**, if necessary.

8. Enter the **Shipping cost**, if applicable.

9. Enter the **Tax**, if applicable.

10. Click **Maintain**.

11. Select an **Inventory Item**.

12. Enter the **Vendor Product Name, NDC Number, Catalog Number, and Manufacturer Lot Number**, if necessary.

13. Enter any **Notes** that are necessary.

14. Enter the **Qty (Quantity) Ordered**.

15. Enter the **Units Per Package**.

Example: You have just ordered 4 cases of dog food, with 24 cans in each case. The number of Packages would be 4. The number of Units Per Package would be 24.

16. Enter the **Purchase Cost**.

17. Click **Apply**.

18. Repeat to add each additional item to order.

19. When all items have been added to the purchase order, click **Close**.

20. Click **Exit**.

Printing a Purchase Order

The Inventory module also makes it easy to email, export, preview, and print individual purchase orders.

1. Click the purchase order to print from the list.
2. Click **Print**.

Receipt of Items

When inventory items are delivered to a business, they are "received" into inventory. All open purchase orders that contain inventory items that have not yet been received are listed on the **Receipt of Items** tab of the Inventory module. It is also possible to receive inventory items for which there is no purchase order on record.

Quick Receipts with a Purchase Order

1. Click the **Receipt of Items** tab. *A list of open purchase orders will appear.*
2. Check **Quick Receipts**.

3. Double-click the purchase order containing the items to receive. *The following appears:*

4. If the Purchase Order has been completely filled, click **Receive All**. If all information is unchanged from your original PO, skip to step 11. Otherwise, proceed to step 5.

5. Double-click **Units** and enter the amount of each inventory item. A Unit is the smallest amount of any item that can be received. In the case of a bottle of pills, one pill is considered a Unit.

6. Double-click **Units Per Pkg** and enter the amount of each inventory item. In the case of a bottle of pills, one bottle considered a Package. So if there were 50 pills in the bottle, you would put the number 50 in this field.

7. Double-click **Packages** and enter the amount of each inventory item. In the case of a bottle of pills, one bottle is considered a Package.

Example: If you say that you have 3 Packages, and 5 Units Per Pkg, the Units box will automatically state that you have 15 Units (3 x 5 = 15). This can be an important time-saver if you enter in the number of Packages, and the number of Units Per Pkg, the total number of Units should appear without any mathematical calculation on your behalf. This applies to all the boxes.

8. Double-click **Unit Cost** and enter the amount of each inventory item.

9. Double-click **Pkg Cost** and enter the amount of each inventory item.

10. Enter **Tax**, if available. *Taxable items need to be configured if values cannot be entered.*

11. Double-click **Total Cost** and enter the amount of each inventory item.

12. If multiple storage locations exist, double-click the Distributed Quantity box(es) and enter the amount of each inventory item.

13. Enter the cost of **Shipping**.

14. Change the **Date Ordered** and **Date Received** as necessary.

15. Click **Apply Changes**.

16. Choose an **Employee Name** from the drop-down menu.

17. Click **Update**.

18. Click **Complete Receipt**.

> **Even if you have not received all the items on your purchase order, it is necessary to click Complete Receipt in order to add the currently received items into your inventory. If you have received 15 packages and are still awaiting delivery of 35 more, those 35 packages will remain on the PO after you complete the receipt.**

19. Change the **New Base Cost,** if necessary.

20. Place a check next to the **Current Base Cost, Most Current Receipt (Unit Cost) or Most Current Receipt (Prorated Unit Cost)** as necessary.

21. Click **OK**.

Manual Receipts without a Purchase Order

1. Click the **Receipt of Items** tab.

2. Click **Add**. *The Select Receipt Vendor dialog box opens.*

3. Select the **Vendor** to receiving inventory items from using the Vendor Name drop-down.

4. Select the appropriate vendor **Contact Name** using the Contact Name drop-down

5. Click **Next**. *The dialog box opens and the system assigns the next available purchase order number to the receipt.*

6. Select an **Inventory Item**.

7. Click **Add Item**.

8. Repeat steps **6-7** to add each additional item.

9. Click **Next** when all items have been added.

10. Select an **Employee** using the Employee Maintaining this Receipt drop-down.

11. Change the **Date Ordered**, if necessary.

12. Change the **Date Received**, if necessary.

13. Enter the **Vendor's P.O. Number**, if necessary.

14. Click **Receive Items**.

15. Verify the **Vendor Product Name** is correct.

16. Enter the **Catalog Number**, if necessary.

17. Enter the **Manufacturer Lot Number**, if necessary.

18. Enter the **NDC Number**, if necessary.

19. Enter the **Expiration Date**.

20. Enter the number of **Packages**, and the **Units per Package**.

Examples: You have just received 4 cases of dog food, with 24 cans in each case. The number of Packages would be 4. The number of Units Per Package would be 24. The total cost would be the cost, to you, of all four cases. Impromed will calculate the number of total Units (96) for you, and determine the Unit Cost for you as well. If you paid $96 for the four cases of food, it will determine for you that you paid $1 per can.

21. The **Unit** is always how the product is sold. *If you sell pills per pill, the bottle is the Package and the Unit is the pill. However, if you sell an entire bottle of pills, then the box the bottles came in is the Package, and the Bottles become the Unit.*

22. Enter the **Total Cost**.

> **The Base Cost is a figure determined by management that is used as a basis to calculate the product selling price. The Base Cost is not necessarily equal to the actual cost of the inventory item.**

23. Distribute the items to the proper storage locations by double-clicking in the cell(s), typing the Distributed Quantity to each storage location, then pressing enter. *You must distribute all units that are being received. If you have only one storage location, this will happen automatically.*

24. Click **Next**.

25. Repeat to receive each additional item. *When all items have been received the Receipt Tax and Shipping dialog box opens.*

26. Enter amounts for **Shipping** and **Tax**. *Taxable items need to be configured if values cannot be entered.*

27. Click **Finish**. *The Adjust Base Cost pop-up appears.*

> **You may select to print, preview, send, email or export a Receipt of Items document.**

28. Choose a **New Base Cost** by double-clicking on the box and typing in a cost, or by placing a check next to one of the following items:

a. **Current Base Cost**: The item will continue to use the same Base Cost.

b. **Most Current Receipt** - Unit Cost: The Base Cost of the item will become the Base Cost from the most current Receipt of Items.

c. **Most Current Receipt** - Prorated Unit Cost: The Base Cost of the item will become the Base Cost from the most current Receipt of Items, but will also add in the cost of tax and shipping.

29. To change the minimum price of the Product connected to this Inventory Item, so that the Minimum Price and the Base Cost are identical, select **Set Product Min. Price To New Base Cost**.

30. Click **OK**.

Adjustments

Each time inventory items are received from a vendor, or a product is invoiced to a client, the inventory level is automatically adjusted accordingly. There may be times, however, when inventory levels need to be adjusted manually to reflect the actual inventory stock.

The adjustment feature allows the inventory quantities in the computer system to match the physical inventory quantities. This feature also makes it easy to move inventory from one storage location to another storage location.

1. Click the **Adjustments** tab. *This can also be opened from the View Inventory tab.*

2. Select the **Business** from the drop-down list, if necessary.

3. Select the **Inventory Item** to adjust.

4. Select the **Storage Location** using the drop-down.

> 💡 **The Out of Stock Bin is the storage location to choose when there are negative numbers that need to be adjusted.**

5. Select an **Employee** using the Employee Adjusting this Inventory Item drop-down.

6. Double-click in the **New QTY On Hand** cell for the lot to adjust.

7. Enter the adjusted quantity.

8. Update the **Unit Cost,** if necessary.

9. Enter any **Adjustment Notes**.

10. Moving inventory between businesses can be completed by following the steps in Move Inventory.

11. Click **Apply** to save the changes.

Return to Vendor

When inventory items need to be returned to a vendor, the quantity that you are returning must be entered into the Inventory module. By entering the quantity to return, inventory levels are automatically adjusted.

> **If Impromed doesn't see that you have any of the Inventory Items you are attempting to return on hand (i.e. the Inventory Item has a quantity of 0 or below) the system will not allow you to return the item.**

1. Click the **Return to Vendor** tab.
2. If multiple businesses exist, click the Practice Name drop-down arrow and select the **Business** returning the inventory item.
3. Select the **Vendor** to return inventory to using the Vendor Name drop-down.
4. Select an **Employee** using the Employee Returning Items drop-down.
5. Click **Maintain List**. *The Maintain Items to Return to Vendor dialog box opens.*
6. Select the **Inventory Item** to return.
7. Enter the **Quantity (Qty) to Return**.
8. Enter a reason for returning the item.
9. Click **Apply**.
10. Impromed will generate a **Packing Slip** to return to the vendor.

> **You may select to print, preview, send, email or export a Return to Vendor document.**

11. To create labels for the items being returned, click **Print Labels**.
12. Click **Apply**.

Purchase History

The Purchase History tab, in the Inventory module, displays the purchase history for items received into inventory through Impromed. By choosing your business and selection criteria, the purchase history is displayed accordingly.

View Inventory

The View Inventory tab, in the Inventory module, displays inventory items as selected using the desired range and criteria. On this tab you also have the option to Adjust Base Cost, Adjust Inventory, Print the Grid, Print Labels, View Lots, and View Purchase History. Once in this view, you can click on the column headings to view the inventory items in a different sort order.

1. Click on the **View Inventory** tab.
2. Select a **Practice Name** if a multi-business hospital.
3. Choose to **select** the **View Range By Inventory Name, Inventory Code,** or **Inventory Category**.
4. Enter the items to view using **Selection Criteria**.
5. Click **Refresh Grid**.
6. Change the sort order of items displayed by clicking on the appropriate column header.
7. You can select an item then click a button to adjust the base cost, adjust the inventory, print labels, view lots, or view purchase history. Or, click **Print Grid** for a printed copy of the inventory items displayed.

Adjust Base Cost

There are several factors that figure into the price a client is charged for product. The cost paid by the business, mark-up, packaging fees, taxes, and discounts all figure into the final product price. One of the values that is used to set a product price is the base cost. Base cost is a dollar value that is set by management and is used to calculate the cost of a product item to the veterinary business. The base cost of a product can be set up from the Setup Inventory and Setup Product dialog boxes. Once base cost is set up for an inventory or product item, it can also be adjusted from the Inventory module.

1. Click the **Adjust Base Cost** tab.
2. Select an **Inventory Item**.

3. Choose your **New Base Cost** by double-clicking on the box and typing in a cost, or by placing a check next to one of the following items:

- **Current Base Cost**: The item will continue to use the same Base Cost.

- **Most Current Receipt (Discounted)**

  ◊ **Unit Cost**: This will display the business' discounted unit cost that comes over from the distributor via Intelligent Inventory.

  ◊ **Prorated Unit Cost**: This will display the business' discounted prorated unit cost that comes over from the distributor via Intelligent Inventory.

- **Most Current Receipt**

  ◊ **Unit Cost**: The Base Cost of the item will become the Base Cost from the most current Receipt of Items.

  ◊ **Prorated Unit Cost**: The Base Cost of the item will become the Base Cost from the most current Receipt of Items, but will also add in the cost of tax and shipping.

4. To change the minimum price of the Product connected to this Inventory Item, so that the Minimum Price and the Base Cost are identical, select **Set Product Min. Price To New Base Cost**.

5. Click **Apply**.

Want List

The Want List is a way to have Impromed tell what should be ordered based on the levels inventory items are setup with. The Want List uses the Maximum, Safety, and Reorder levels, as well as the Reorder quantity to determine what needs to be ordered. To set these up please visit Inventory Items Setup. The Want List is a per business list that can be manipulated from any business.

When the quantity of an inventory item on hand drops below its reorder level, Impromed displays a "Re-Order Warning" message alerting operators this item needs to be reordered.

For easy inventory ordering, the Inventory module allows inventory items to be added to the Want List. The Want List maintains a running list of items that need to be reordered. When it is time to order the items on the want list, Impromed can automatically create purchase orders for the items being ordered.

In addition, you can also add any item you wish to reorder, regardless of whether the item has reached its reorder level, making this the quickest and easiest method of generating a Purchase Order.

There are two ways to use the Want List:

- **Click Reorder All** - Compiles a list of inventory items to order based on the levels and quantities setup in the Inventory Items Setup screen. The following message appears:

    ◊ **Include Items with a Reorder Level of zero** - Allows an operator to include items that have a reorder level of zero currently setup.

    ◊ **Include Items with a Reorder Quantity of zero** - Allows an operator to include items that have a reorder quantity of zero currently setup.

- **Click Add** - Allows any operator to add to the Want List manually as needed.

Once all of the items are on the list the vendor column is filled in based on the last vendor from whom the item was purchased. If the vendor column is empty or to order from a different vendor for any item the operator can use the drop down menu to select a vendor.

Columns in the Want List:

- **Put on a P.O.?** - This column of check boxes allows item(s) that should be pushed through to Purchase Orders to be selected. This is used in correlation with the Create P.O.s button.

- **Inventory Name** - Displays the name of the inventory item.

- **Inventory Code** - Displays the code of the inventory item.

- **Qty On Hand** - Displays the current quantity on hand for the inventory item.

- **Units On Order** - Pulls the quantity that may already be on existing purchase orders.

- **Units To Order** - Displays the quantity to order that is calculated based how the item is setup.

- **Qty Per Pkg** - Displays the quantity that is in one package, for example, a bottle of pills can contain 500 pills this would mean that the quantity per package is 500.

- **Pkgs To Order** - Displays how many packages should be ordered, for example, you need 1000 pills and each bottle holds 500 - the operator would order 2 packages.

- **Vendor** - Displays the last known vendor that the item was purchased from.

The following buttons can be used in the Want List:

- **Print Labels-Checked** - Prints an inventory label for any item currently selected in the Want List.

- **Print Labels - List** - Prints an inventory label for all items currently in the Want List.

- **Print Grid** - Prints the grid as the operator sees it on screen.

- **View Lots** - Shows the operator the quantities on hand for the storage locations that house the selected item.

- **View Purchase History** - Shows the operator the purchase history for the selected item.

- **View Locations** - Shows the operator what levels and quantities are currently setup per location for the selected item.

- **Inventory Adjustments** - Allows the operator to adjust the selected inventory item while on the want list.

- **Remove One** - Takes the selected inventory item and lower the Units to Order by the quantity it was last received, usually by unit or package.

- **Delete Item** - Removes the selected item from the list.

- **Clear List** - Clears the entire list (manually added items as well as compiled items).

- **Create P.O.'s** - Takes any selected inventory item(s) and create purchase order(s) based on the vendor.

- **Delete Checked** - Removes all selected items from the list.

- **Check All Items** - Selects all inventory items in the want list.

- **Check Specific** - Allows the operator to select items based on the vendor.

- **Uncheck All Items** - Deselects all inventory items in the want list.

Creating P.O.'s using the Want List

💡 **If any item on the Want List has a quantity to order of zero the item will not transfer to a purchase order.**

1. Select a **Business** from the Practice Name drop-down if you're set up for multiple businesses.

2. Select the **Inventory Item** to add to the Want List.

3. Click **Add**. *The item is added to the list*

💡 **If you wish for Impromed to generate a list of all Inventory Items that have reached their reorder level, click Reorder All, and these items will appear.**

4. Adjust the values for the **Units To Order, Qty Per Package,** and **Packages To Order** by double-clicking in each cell and entering the amount.

5. Select a **Vendor** from the drop-down list. *Otherwise, Impromed will automatically select the last vendor the item was ordered from.*

6. To add items to a Purchase Order, select **Put on a P.O.?**.

7. When all items that need to be ordered are added to the want list, click **Create P.O.'s**.

8. Select the **Employee Name** from the dialog box that opens.

9. Click **Create**. *The purchase orders will be added to the Purchase Orders tab, and removed from the Want List.*

Inventory Reports

Inventory Reports allows operators to gather information on inventory items, purchase orders, and items received. Operators will have the option to print any of these reports for all inventory items or select specific items. Operators can also print multiple businesses at once or a single business. All of these reports can be exported from the preview screen to either Microsoft™ Excel® or Adobe PDF files for future access or manipulation.

Back Ordered Items Report
The Back Ordered Items Report displays any item on a purchase order where only some items have been received while others are still waiting to be received from the selected vendor. For example, if there are 10 items on a receipt and only 4 are received the other 6 are considered back ordered. Purchase orders must be created for items to appear in this report.

Inventory Adjustments
The Inventory Adjustments Report may be used to verify shelf quantities against Impromed or to verify items are pulled from inventory properly when being invoiced. Many businesses use this report when the physical quantity on hand does not match Impromed.

Inventory Adjustments - Move Inventory
The Inventory Adjustments Report may be used to verify shelf quantities against Impromed when items are moved between businesses or storage locations. Many businesses use this report when the physical quantity on hand does not match Impromed.

Inventory Adjustments by Type
The Inventory Adjustments Report may be used to verify shelf quantities against Impromed or to verify items are pulled from inventory properly when being invoiced. Many businesses use this report when the physical quantity on hand does not match Impromed. This report is categorized by the Adjustment Type used.

Inventory Category Totals
The Inventory Category Totals Report reflects the amount of inventory a business has on hand for the selected year. Most businesses give this report to their accountants for tax purposes.

Inventory Category Totals Report - FIFO

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
EQ Office Visits/New Clients	Ov EQ	0.0000	$ 0.0000			
EQ Anesthesia Services	AN EQ	0.0000	$ 0.0000			
EQ Dental Services	Dent EQ	401.0000	$ 5,488.4300	Total For 2008	2.0000	$ 26.5400
EQ Injectables	Inj EQ	21,402.6600	$ 7,135.7400	Total For 2008	1.0000	$ 23.8300
EQ Inventory - In Hospital Use	Inv	11,399.0000	$ 1,824.3635	Total For 2008	0.0000	$ 0.0000
EQ Laboratory Services	Lab EQ	(1.0000)	$ 36.1800	Total For 2008	0.0000	$ 0.0000
EQ Medications	Med EQ	1,915,151.5000	$ 16,778.5192	Total For 2008	5.0000	$ 167.0000

Inventory Category Totals Report - LIFO

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
EQ Office Visits/New Clients	Ov EQ	0.0000	$ 0.0000			
EQ Anesthesia Services	AN EQ	0.0000	$ 0.0000			
EQ Dental Services	Dent EQ	401.0000	$ 5,488.3600	Total For 2008	2.0000	$ 26.6800
EQ Injectables	Inj EQ	21,402.6600	$ 5,190.2419	Total For 2008	1.0000	$ 23.8300
EQ Inventory - In Hospital Use	Inv	11,399.0000	$ 1,831.7506	Total For 2008	0.0000	$ 0.0000
EQ Laboratory Services	Lab EQ	(1.0000)	$ (4.2200)	Total For 2008	0.0000	$ 0.0000
EQ Medications	Med EQ	1,915,151.5000	$ 13,087.0084	Total For 2008	5.0000	$ 167.0000

Inventory Category Totals Report - Specific ID

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
EQ Office Visits/New Clients	Ov EQ	0.0000	$ 0.0000			
EQ Anesthesia Services	AN EQ	0.0000	$ 0.0000			
EQ Dental Services	Dent EQ	401.0000	$ 5,488.4300	Total For 2008	2.0000	$ 26.5400
EQ Injectables	Inj EQ	21,402.6600	$ 7,135.7400	Total For 2008	1.0000	$ 23.8300
EQ Inventory - In Hospital Use	Inv	11,399.0000	$ 1,830.5335	Total For 2008	0.0000	$ 0.0000
EQ Laboratory Services	Lab EQ	(1.0000)	$ 36.1800	Total For 2008	0.0000	$ 0.0000
EQ Medications	Med EQ	1,915,151.5000	$ 16,778.5192	Total For 2008	5.0000	$ 167.0000

💡 **Impromed highly recommends running all Inventory Reports using the Specific ID where it can be selected. This gives you the most accurate and to-date information on your inventory.**

Inventory Category Totals Report - Weighted Average

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
EQ Office Visits/New Clients	Ov EQ	0.0000	$ 0.0000			
EQ Anesthesia Services	AN EQ	0.0000	$ 0.0000			
EQ Dental Services	Dent EQ	401.0000	$ 5,488.0058	Total For 2008	2.0000	$ 26.5400
EQ Injectables	Inj EQ	21,456.6600	$ 5,006.7864	Total For 2008	1.0000	$ 23.8300
EQ Inventory - In Hospital Use	Inv	11,399.0000	$ 1,944.4761	Total For 2008	0.0000	$ 0.0000
EQ Laboratory Services	Lab EQ	(1.0000)	$ 11.1540	Total For 2008	0.0000	$ 0.0000
EQ Medications	Med EQ	1,915,407.5000	$ 15,769.9837	Total For 2008	5.0000	$ 167.0000

Inventory Count Sheet

The Inventory Count Sheet is designed for staff to easily count and verify the physical quantity on hand matches Impromed's quantity on hand.

Inventory Expiration Report

The Inventory Expiration Report lists any inventory item that has an expiration date based on the selected report options as described below.

EXPIRATION DATE	ITEM CODE	DESCRIPTION	PRACTICE ID	LOT ID	STORAGE LOCATION	NDC NUMBER	VENDOR NAME	QTY ON HAND
03/01/2000	425	Comprehensive Profile	0	52	Default Storage Location	- -	CSC High Plains	12
01/31/2001	2830	Ophthalmic - Triple Antibiotic Ointment	0	46	Default Storage Location	- -	VHA	12
03/02/2002	2451	Acepromazine Inj 10mg/ml /ml	0	1	Default Storage Location	- -		526
	4501	Alcohol Isopropyl gal (70%)	0	1	Default Storage Location	- -		15
	434	ALT (SGPT)	0	1	Default Storage Location	- -		1,021
	3772	Aminophylline 250 mg 10cc Inj.	0	1	Default Storage Location	- -		7
	2215	Ampicillin Inj 250mg/ml	0	1	Default Storage Location	- -		4,700
	402	Amylase	0	1	Default Storage Location	- -		33

Inventory Information Export
The Inventory Information Export is used to export inventory purchase history to a third party software package. The third party software package can forecast future inventory purchases from the imported comma separated value file. Currently the only third party software package available for this export is from Vanguard Software Corporation.

Inventory Lots by Storage Location
The Inventory Lots By Storage Location Report prints a listing of inventory items with each lot for that item within a storage location.

Inventory Lots Report
The Inventory Lots Report prints a listing of inventory items with each lot for that item.

Inventory Status Report
The Inventory Status Report lists all selected inventory items with the total quantity on hand, total cost, and prorated total cost. The total cost is the quantity on hand multiplied by the unit cost. The prorated total cost is calculated the same way, but using the prorated unit cost from the lot, which includes shipping and tax paid for the item.

Inventory Usage
The Inventory Usage report breaks down the quantity sold and/or the cost of items for the last five years based on the cost method selected when printing.

Outstanding Purchase Orders
The Outstanding Purchase Orders report lists any purchase order that is still open.

OverStock Report
The OverStock Report gives the current information of what is ordered and what is on hand along with the storage location levels that each business has set up.

Purchase History - Receipts
The Purchase History - Receipts Report prints a list of inventory items that were received into Impromed from a purchase order for the selected date range.

Purchase History By Inventory Item
The Purchase History By Inventory Item Report prints a list of inventory items that were received into Impromed from a purchase order for the selected date range.

Purchase History By P.O. Number
The Purchase History By P.O. Number Report prints a list of inventory items that were received into Impromed from a purchase order for the selected date range and sorts the list by purchase order.

Purchase History By Vendor
The Purchase History By Vendor Report prints a list of inventory items that were received into Impromed from a purchase order for the selected date range and sorts the list by vendor.

ReOrder Report
The ReOrder Report determines what a business should order based on the storage location levels that have been setup. The items selected are determined by the total quantity on hand versus the reorder level, however, the quantity on hand and the reorder quantity cannot be greater than the maximum level.

ReOrder Report By Storage Location
The ReOrder Report By Storage Location determines what a business should order based on the storage location levels setup and will sort based on the storage location.

ReOrder Report By Vendor
The ReOrder Report By Vendor Report determines what a business should order based on the storage location levels setup and allows operators to select specific vendors to reorder inventory from.

Returns to Vendor
The Returns to Vendor Report lists any inventory items returned to the vendors for the selected date range.

Storage Locations
The Storage Locations Report lists each selected storage location with the total cost of inventory. The report then totals all locations together for a total cost.

Vendor Purchase History By Category
The Vendor Purchase History By Category Report lists inventory items that were purchased from a vendor and is sorted by category name.

Vendor Statistics
The Vendor Statistics Report totals the cost of items purchased from vendors per quarter for the last 5 years. A yearly total is also calculated for each vendor.

Want List
The Want List report will print the want list from the Inventory Module.

Physical Inventory Count

Inventory Count Sheet

The Inventory Count Sheet is designed for staff to easily count and verify the physical quantity on hand matches Impromed's quantity on hand. When this report is printed, it provides the inventory name, inventory code, quantity on hand, count, unit of measure, and bar code for the selected items. In the count column operators can write the quantity to be reentered at a later time. If a business is using bar code scanners, when going to make the adjustment in Impromed they can simply scan the bar code for the item to be adjusted.

1. Click > **Modules > Reports**.
2. Expand **Inventory Reports**.
3. Select **Inventory Count Sheet**.
4. Click **Print**. *A dialog box containing print defaults for the selected report opens.*
5. Choose the **Practice(s)** to include.
6. Select **Inventory Category** to Print By.
7. Print one category at a time.
8. Click **OK**.

Inventory Item Listing

The Inventory Item Listing is designed for staff to easily see items, their base cost, and the quantity on hand at a glance. When this report is printing, it provides the inventory code, inventory name, unit of measure, number of decimals, base unit cost, controlled substance, and quantity on hand.

1. Click > **Modules > Reports**.
2. Expand **Setup Reports** > **Setup Inventory Reports**.
3. Select **Inventory Item Listing**.
4. Click **Print**. *A dialog box containing print defaults for the selected report opens.*
5. Choose the **Practice(s)** to include.
6. Select **Inventory Category** in the Category Range to Print.
7. Print one category at a time by selecting the Starting and Ending as the same category.
8. Click **OK**.

Adjusting Your Inventory

Each time inventory items are received from a vendor, or a product is invoiced to a client, the inventory level is automatically adjusted accordingly. There may be times, however, when inventory levels need to be adjusted manually to reflect the actual inventory stock.

The adjustment feature allows the inventory quantities in the computer system to match the physical inventory quantities. This feature also makes it easy to move inventory from one storage location to another storage location.

1. Click > **Modules > Inventory**.

2. Click the **Adjustments** tab. *This can also be opened from the View Inventory tab.*

3. Select the **Business** from the drop-down list, if necessary.

4. Select the **Inventory Item** to adjust.

5. Select the **Storage Location** using the Storage Location drop-down.

> **The Out of Stock Bin is the storage location to choose when there are negative numbers that need to be adjusted.**

6. Select an **Employee** from the Employee Adjusting this Inventory Item drop-down arrow.

7. Double-click in the **New QTY On Hand** cell for the lot to adjust.

8. Enter the adjusted quantity.

9. Update the **Unit Cost,** if necessary.

10. Enter any **Adjustment Notes**.

11. Click **Apply** to save the changes.

INVENTORY MANAGEMENT

Intelligent Inventory

Intelligent Inventory, LLC is designed to eliminate virtually all of the manual data entry common in inventory management and replace it with a simple, intuitive solution. Intelligent Inventory, through a partnership with your inventory distributors, transfers your data into your software in the form of a purchase order. When the order arrives, a few clicks of the mouse receipts the order, updates your quantities, updates your cost and pricing, and you are on your way to your next task. Here is how it works:

1. Place the **Order** any way you want. Intelligent Inventory is not an ordering program, it is a fulfillment program.

2. The **Distributor** fills the order and sends the data to you via Intelligent Inventory. You can review the order from your software, check on backorders, and monitor the status of the order.

3. When the order arrives, process the **Receipt**. Verify the packing slip is correct. Once verified, click **Complete Receipt** to finish processing the order.

4. Once the receipt is completed, your **Cost/Pricing** is displayed for review.

The current list of Distributors that work with Intelligent Inventory include:

- Covetrus®
- Midwest Veterinary Supply

Register with Intelligent Inventory

Before Impromed can process purchase orders from Intelligent Inventory, the practice must register with Intelligent Inventory, LLC and setup the Gateway service. The Gateway service is the form of communication used between Intelligent Inventory and the Impromed program.

1. Open a Web browser.

2. Go to www.intelligentinventory.com.

3. Click **Register**.

4. Fill in any required information.

5. Click **Submit**. *A screen will display with your Gateway account number and username. Make note of that information plus your password. It will be needed when setting up the Intelligent Inventory Gateway Manager.*

A support ticket will automatically be created and Impromed Support will be contacting you to make an appointment to finish the configuration of Intelligent Inventory.

Intelligent Inventory Purchase Orders

To "create" a Purchase Order, all that is necessary is to call, fax, create an order online, or otherwise contact the Distributor for whom Intelligent Inventory is already configured in Impromed, and the Purchase Order will appear in the clinic's Inventory Module.

You can also choose to use the Covetrus Closed Loop Ordering to generate Purchase Orders as well.

Closed Loop Ordering with Purchase Orders

1. From the **Inventory Module**, click **Add**.

2. Click **Maintain** to add items to the purchase orders.

3. Select the inventory items you wish to order, adjust the quantities, and click **Apply** to add each item to the purchase order.

4. When finished click **Close**.

5. When ready to place the order, click the **Submit Order** button. Once everything is linked and verified, click **Submit Order**. Then click **OK** to send the order to the Covetrus Shopping Cart.

6. Click **Continue** when the order is verified. Any promotions will be displayed, if any apply. Click **Proceed** to finalize the order. Click **Submit Order** when finished to submit the order in its entirety.

7. When the order has been shipped and the business receives it, continue to Receipt of Items.

Using Closed Loop Ordering with the Want List

With the Inventory Module open, click the **Want List** tab. Select an inventory item and click **Add**.

When all items are added to the Want List and the quantities are set, click **Submit Order**.

> 💡 **The Vendors column (which is not shown above) needs to be assigned to Covetrus for the item to be transferred to the Shopping Cart.**

Once everything is linked and verified, click **Submit Order**. Then click **OK** to send the order to the Covetrus Shopping Cart.

When the order has been shipped and the business receives it, continues to Receipt of Items.

Resolving Unresolved Inventory Items

Purchase Orders that have a number with a red background in the cell of the Unresolved Items column contain items that need to be resolved (i.e. linked) an Impromed Inventory Item. Resolving the purchase orders with these unlinked items can be accomplished by clicking on the POs Needing Attention button.

The Unresolved Intelligent Inventory Purchase Orders screen will display a list of all purchase orders that have items that need to be resolved.

To resolve these items:

1. Double-click or highlight these items and click the **Resolve** button.
2. Select the **Name** or **Code** boxes to select the inventory item from the drop-down which matches the distributor item.
3. Click **Save Changes**.

Receipt of Items

This is the main screen for Receipt of Items. Using the Ribbon:

1. Click **Business > Inventory**.
2. Click the **Receipt of Items** tab.
3. Receive items from a purchase order.
   - Double-clicking on an *Intelligent Inventory Purchase Order* will take you directly to screen that will allow you to receive the items into inventory.

⚠️ *If all items on the Purchase Order need to be resolved, a prompt will be displayed telling you to do so. If any of the items on the Purchase Order are already linked, those items will appear on the receipt screen. Any items on a purchase order that still need to be resolved will not be available to be received.*

Once the items are resolved, they will show up to be received. If items for a purchase order are received when there are still items that need to be resolved, the purchase order will not be closed. Only when all items are linked and received in full will the Purchase Order be closed.

   - Another method of receiving items from a Intelligent Inventory Purchase Order is by clicking the Intelligent Inventory button on the right-hand side of the screen.

◊ Purchase Orders may be selected from this screen by double-clicking a Purchase Order or highlighting a Purchase Order and clicking the **Receive** button. Doing this will take you to the following screen:

The Receive Intelligent Inventory Purchase Order Items screen will only contain items from the purchase order that are linked and ready to be received.

The values in the columns of this grid default to the values that came from the Distributor's web site.

> **If for some reason those values are zero, the cells will have a red background color. These zero quantity values will have to be modified to a positive value before the Complete Receipt button will be enabled.**

4. Once everything is verified to be correct, the **Complete Receipt** button can be pressed to save the receipt to Inventory.

> ⚠ *If the Complete Receipt button is disabled, it may be that one of the items requires an NDC number and/or currently has an invalid NDC number.*
>
> *The Tax prompt in the lower right hand corner of the screen may be disabled if there are not any items on the PO that are taxable by the distributor.*

5. After electing to complete the receipt, the following screen will be displayed.

6. The operator needs to enter the **Employee Name** of the employee that is receiving the items into the inventory.

7. Select a **Print Option** for printing the receipt.

8. Click **Update**.

> **If there are any items that need to be resolved for the Purchase Order, they will be printed on the receipt in a separate section.**

Maintaining Product Links

Creating product links are done at the time each purchase order is received. However, in the event a link must be modified, you can do so in the Maintain Catalog Link dialog box.

From the Ribbon:

1. Click on **Business > Inventory > Vendors**.
2. Select the **Vendor**.
3. Click **Edit** for **Mode**.
4. Click the **Intelligent Inventory** tab.
5. Click **Maintain Catalog Link**.

In the Intelligent Inventory Catalog Link screen, the operator is able to link items that have been previously purchased from the distributor to inventory items within Impromed.

6. Double-clicking or pressing **Enter** in either the **Name** or **Code** column will display an Inventory Selector. This Inventory Selector allows the operator to select the Inventory Item from within the Impromed database.
7. Click **Apply** to save changes to the selected inventory item and close the screen.
8. Click **OK** on the Intelligent Inventory Catalog Link to close.