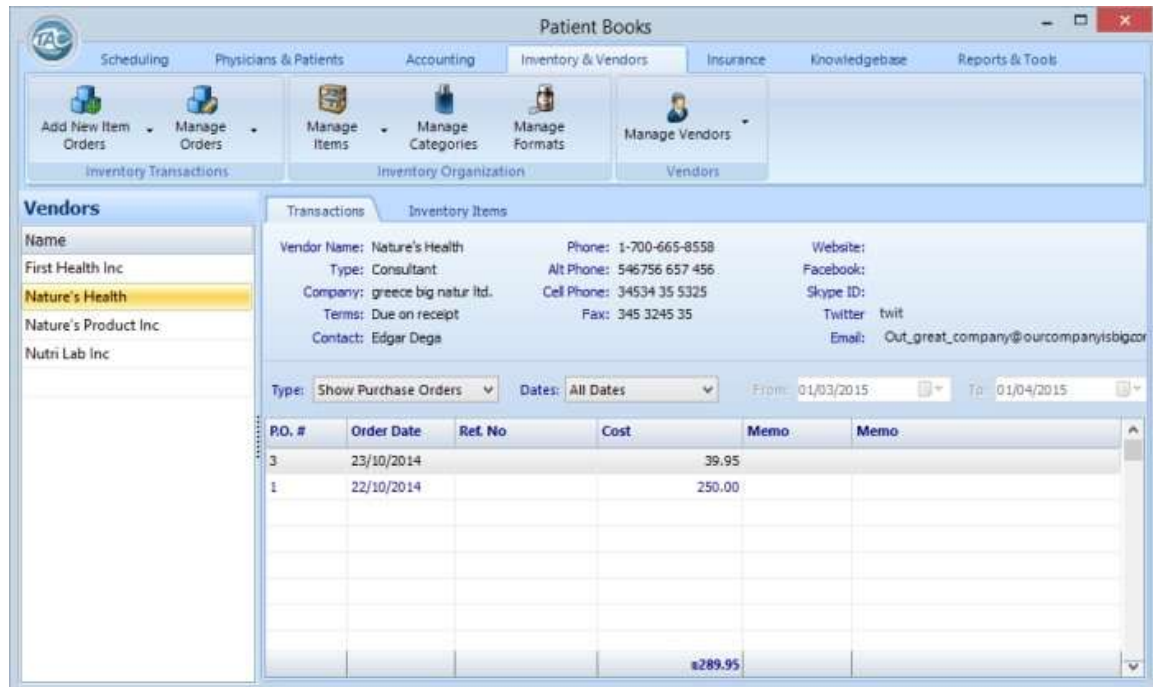


Inventory

The inventory and vendors window provides the ability to create purchase orders, receive items, generate payment forms, add or edit vendor's information and inventory items, and also keep track of stock costs and sales.



To the left of the window the vendors are listed with their contact information (when selected). It is possible to add, edit or delete a vendor by using the Manage Vendors button from the top toolbar, or right-click over a vendor's name from the list.

The transaction tab on the right contains a table that lists each selected vendor's transactions. The type of the listed transactions can be selected from the Type box. It will filter the requested type in the time frame of the selected option in the Date box and calendars.

Show Purchase Orders: lists all of the purchase orders that were created for the selected vendor inside the chosen date period.

Show Received Orders: lists all of the received orders from the selected vendor inside the chosen date period. It is possible to receive items based on an earlier PO or from a scratch empty form.

Show Payments: lists all of the payments that were paid to the selected vendor inside the chosen date period. Payments can be created against an earlier received order form.

Use the Manage Orders button on the top toolbar to edit or delete received orders or PO.

A purchase order is created whenever there is a need to inform a vendor about required items. Later it is possible to receive items from the vendor based on that purchase order. It is,

however, possible to use the receive items form without creating a purchase order. When creating a purchase order or receive items forms, the following window will be used:

Item	Description	Qty	Unit Price	Tot Price	Category	Format
B12 500 MCG	my purchase notes	45	14.95	672.75	Vitamins	Bottles
Oregano Essential Oil	Get the green bottles	50	34.95	1,747.50	Herbs	Powder
				\$2,420.25		

When creating a purchase order, no inventory quantity adjustments will be made or any balance changes. These will happen only when actually receiving the ordered items from the vendor.

When actually receiving items from a vendor you want to use the receive items option. It is possible to either create the receive items form from a previously created purchase order, or create it from scratch. It is also possible to use the 'receive and pay' option which enables you to mark items as received and pay for them with the same form.

When receiving items (or receiving and paying), PatientBooks registers it as a received items transaction. The received items are then added into the existing stock, increasing the on-hand quantity, and adjusting the average cost of the item.

Inventory Items tab: the other view option in the main inventory window is managed by clicking on the Inventory Items tab. This will present a table with a complete list of items in the clinic's inventory. The items can be sorted by any column. Clicking on the header of any column sorts the list in an ascending order related to that column, for example, by Code, by Name, by number of items on hand, etc. A second click will sort that column in a descending order.

Patient Books

Scheduling Physicians & Patients Accounting **Inventory & Vendors** Insurance Knowledgebase Reports & Tools

Add New Item Orders Manage Orders Manage Items Manage Categories Manage Formats Manage Vendors

Inventory Transactions Inventory Organization Vendors

Vendors Transactions Inventory Items

Name	Code	Item Name	OnHand	Cost	Av. Cost	Sale	Markup	Margin	Taxed	Tax %	Format	Category	Asset Val	Retail Val
First Health Inc	1 VT-122345	B12 500 MCG	30	14.95	14.95	19.99	33.71	25.21	No	0.00	Herbe		448.50	599.70
Nature's Health	2 VT-22001	Biotin 5 MG	35	24.49	24.49	39.99	63.29	38.76	Yes	7.50	Bottles	Patent	857.15	1399.65
Nature's Product Inc	3 CC-12345	C-1000 Complex	1	10.00	20.00	20.00	100.00	50.00	Yes	0.00			20.00	20.00
Nutri Lab Inc	4 AA-99999	Coughsoff	26	30.00	30.00	59.95	99.83	49.96	No	0.00	Bottles	Patent	780.00	1558.70
	5 AX-55613	Oregano	21.33	34.95	49.95	50.00	43.06	30.10	No	0.00	Powder	Herbe	1065.43	1066.50
	6 CH-11001	Qing Wen Bai Du	24	12.50	12.50	15.59	24.72	19.82	No	0.00	Other	Moxa	300.00	374.16
	7 VT-66135	Vitamin A 10000	0	22.00	22.00	33.00	50.00	33.33	No	0.00			0.00	0.00
	8 VT-0002A	Vitamin B+	10	25.00	30.16	49.95	99.80	49.95	No	0.00	Bottles	Vitamins	301.60	499.50
	9 VT-0055B	Vitamin C	24	19.90	19.90	24.95	25.38	20.24	Yes	7.50	Powder	Vitamins	477.60	598.80
	10 VT-07899	Vitamin D3 5000	3	15.00	5.00	25.99	73.27	42.29	Yes	10.00	Capsules	Herbe	15.00	77.97
	11 CH-225-99	Zhen Zhu An	0	10.00	10.00	15.00	50.00	33.33	Yes	6.50	Powder	Moxa	0.00	0.00
	12 CH-23234	Zhi Zi Dou Chi	15	25.00	24.85	35.00	40.00	28.57	No	0.00	Capsules	Formulas /	372.75	525.00
													\$4,638.0	\$6,719.98

Use the Manage Items button from the top toolbar, or right-click over an item in the Inventory Items table, to create, edit or delete an inventory item:

Add/Edit Inventory Item

Item Name: Biotin 5 MG **Date Added:** 18/03/2015

Item Category: Patent Formula **Code:** VT-22001

Format: Bottles **Reorder point:** 10

Purchase Information

Preferred vendor: Nature's Health

Cost: 24.49

Description on Purchase Transaction:

Sales Information

Sales Price: 39.99

Rate (%): 7.50 Taxed

Description on Sales Transaction:

Price inc. Tax: 42.99

When creating or editing an inventory item, it is possible to enter the various item's information, such as name and code, and also the cost price and sales price. This information will be inserted automatically when selling this item, filling an invoice for a patient, etc.

The small icons next to the category and format boxes can be used to add new categories and formats, or delete existing one. It is also possible to add or edit and delete categories and formats from the Manage Categories and Manage Formats buttons in the top toolbars of the main inventory window.

Adjust Quantity on Hand: PatientBooks automatically adjusts your inventory quantities after every purchase and sale. If you need to manually adjust the quantity, due to loss of items, etc, it is possible to do so from the Adjust Quantity on Hand option. The option is available by right-clicking an item in the Inventory Items table, or from the Manage Items button on the top toolbar.

When you adjust a quantity, PatientBooks assumes that the average cost of the item remains the same and adjusts the value accordingly.