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SIS (Simple Inventory System)

Creating a More Efficient Process

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How would you like to???

- Simplify the laboratory's inventory process?
- Automate supply disbursement with a mini bar-code scanner?
- Reduce physical inventory frequency ?
- Reduce Emergency orders?
- Cut your lab's inventory tracking chores in half?



CARB
Eximer Reagents
Lot: 1234 Exp: 12/31/2007



* 4 7 5 0 1 . A *

Recv'd
12/30/2007
Rm A Bin 9



Objectives

At the conclusion of this session, you should be able to:

- **Describe the theory and operation of the SIS module**
- **Create a master inventory list with lot numbers and out-of-stock threshold levels**
- **Perform a physical inventory**
- **Create a shopping list**
- **Subtract items leaving and Add items into Inventory**



What SIS Does and Doesn't Do

- **Does ...**
 - Provide **daily** current Quantity On Hand
 - Print barcode labels (3 in 9 symbology)
 - Make a Shopping List of items to purchase
 - Manage lot numbers separately
 - Provide audit trail
 - EE11.2 allows cost information
- **Does not ...**
 - **Allow real-time inventory checkout**
 - The barcode scanner memory holds about 350 barcodes
 - **Daily** (or perhaps weekly), upload scanner memory to the computer
 - **Connect directly to an enterprise supply chain system**
 - **Use the bar codes already on the Vendors packaging**
- **Advantage: A low cost solution**
 - **minimal \$ in hardware and network infrastructure**

Inventory Flow chart

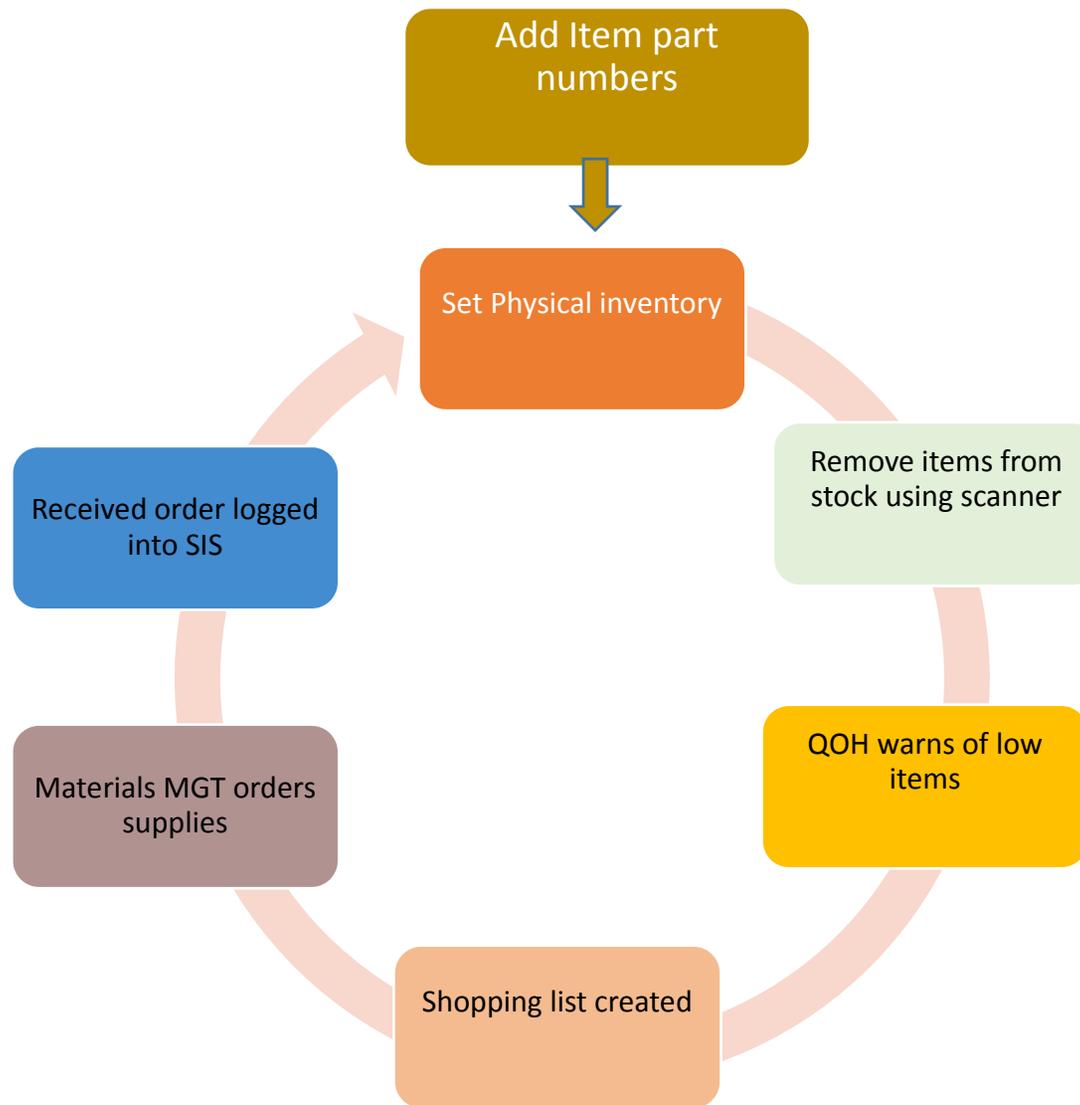
Three Key Counting Processes

- **Set Physical Inventory**
 - initially
 - Periodically to add new P/N or maintain the process
- **Subtract from Inventory**
 - when items are removed
 - use the bar code scanner
- **Add to Inventory**
 - when a shipment is received

Key Concepts

- **SIS is a separate program in the tools menu**
- **Key screens**
 - **Items**
 - **Quantity on hand (QOH)**
 - reflects physical inventory with additions and subtractions
- **Key lists - print or keyboard entry**
 - **Count sheets** to facilitate physical inventory
 - **Shopping lists** to manage incoming orders
 - **Barcodes** to manage item usage

Inventory Process Flow



The main item screen

SIS [Demo 1]

File Edit Search Utilities Help

Setup Items OOH Lists Print Scanner Clipboard Refresh Back

Master List of Inventory Items Mode: Edit Select Suppress repeating group name

Item Group	Item Name	Count Sheet	Part #	Has Lots	Min Qty	Max Qty	Standing Order Qty	Divisor	Active	Location	Vendor	Vendor Part #	Description
Eximer Rgt	ALBUMIN	1	8000000000	<input checked="" type="checkbox"/>	1	10			<input checked="" type="checkbox"/>	Shelf 1			
Eximer Rgt	ALT	1	809570	<input checked="" type="checkbox"/>	1				<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt		1	809571	<input type="checkbox"/>	1				<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt		1	809572	<input type="checkbox"/>	1				<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt		1		<input checked="" type="checkbox"/>	1				<input checked="" type="checkbox"/>				
Eximer Rgt		1		<input type="checkbox"/>	1				<input checked="" type="checkbox"/>				
Eximer Rgt		1		<input type="checkbox"/>	1	10			<input checked="" type="checkbox"/>				
Eximer Rgt	GGTP	1		<input type="checkbox"/>	1	10			<input checked="" type="checkbox"/>				
Eximer Rgt	GLU	1	809581	<input type="checkbox"/>	1	10			<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt	HDL		809582	<input type="checkbox"/>	1	10			<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt	FE		809750	<input type="checkbox"/>	7				<input checked="" type="checkbox"/>	Frig 1			
Eximer Rgt	CO2		809724	<input type="checkbox"/>	8				<input checked="" type="checkbox"/>				
Eximer Rgt	UCOC		809112	<input type="checkbox"/>	1	3			<input checked="" type="checkbox"/>				
Eximer Rgt	UPRO	1	809751	<input type="checkbox"/>	1	4			<input checked="" type="checkbox"/>				
Eximer Cal	SET . CAL	1	809604	<input type="checkbox"/>	1	3			<input checked="" type="checkbox"/>	frig 2			

Record 1 of 48

Select All Select None With selected items do Create a new list Go

04 Jan 2008 12:25:42 AM Latest transaction: P1 01 Jan 2008 13:25:02 Logged on as Administrator (Administrators)

Physical Inventory

- Create and print “Count Sheets”
- Count items and record differences
- Enter corrected counts into the SIS count sheet list and **Set as Physical Inventory**

Manual Count Worksheet									
Physical Inventory Count Sheet #1									
					Counted by: <u>wkcf</u>	Date: <u>9-22-08</u>	Time: <u>10:05</u>		
Eximer Reagents									
Item Name	Part Number	Lot	Expiration	Qty				Divisor	
CARB	47501.D	444444	01 Dec 2008	0	✓			3	
CARB	47501.C	333333	01 Sep 2008	0.7	✓			3	
CARB	47501.B	9999	02 Jun 2008	0.7	✓			3	
CARB	47501.A	1234	31 Dec 2007	0		2	0	3	
CARB	47501.E	555555	31 Jan 2009	5.7		4	2	3	
CEA	47502			2	✓			2	
CKMB	47503			2	✓			5	

Physical Inventory on screen count sheet List

CtSheet#1 (1): Physical Inventory Count Sheet #1											
Seq	Group	Item Name	Part Number	Lot Number	ExpDate	Vendor	Qty	Divisor	Unit Price	Total Price	
2	Eximer Reagents	CARB	47501.A	1234	8/14/2020	AAA	2	1	\$250.00	\$500.00	
2	Eximer Reagents	CARB	47501.B	9999	6/2/2020	AAA	1	1	\$250.00	\$250.00	
5	Eximer Reagents	CKMB	47503			BBB	1	1	\$300.00	\$300.00	
9	Eximer Reagents	CORT	47504			BBB	1	1	\$250.00	\$250.00	

Record 2 of 4

With this list do

- Add to inventory
- Add to inventory
- Subtract from inventory
- Set as physical inventory
- Clear Qty Column
- Print barcode labels
- Copy to clipboard

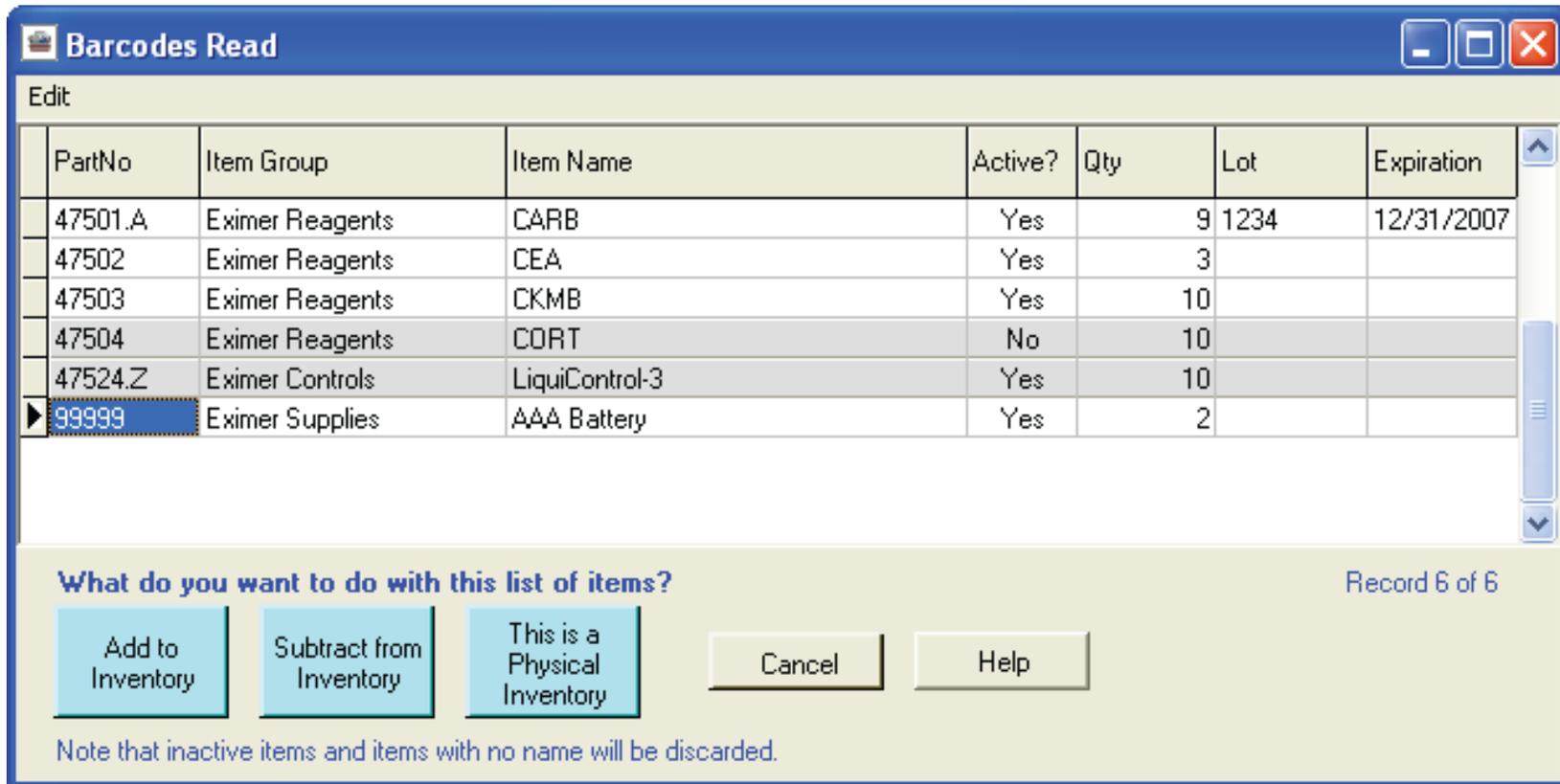
09 Jun 2015 12:44:18 PM Latest transaction: ADD 04 Oct 2007 12:56:59 Logged on as

The Checkout Process

- Place a checkout scanner in each storeroom in each storeroom
- Have employees scan items as they remove them
- Daily, upload data from scanners and Subtract from Inventory



Using the scanner



The screenshot shows a software window titled "Barcodes Read" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a menu bar with "Edit". The main area contains a table with the following data:

PartNo	Item Group	Item Name	Active?	Qty	Lot	Expiration
47501.A	Eximer Reagents	CARB	Yes	9	1234	12/31/2007
47502	Eximer Reagents	CEA	Yes	3		
47503	Eximer Reagents	CKMB	Yes	10		
47504	Eximer Reagents	CORT	No	10		
47524.Z	Eximer Controls	LiquiControl-3	Yes	10		
99999	Eximer Supplies	AAA Battery	Yes	2		

Below the table, there is a question: "What do you want to do with this list of items?" and a status indicator "Record 6 of 6". There are five buttons: "Add to Inventory", "Subtract from Inventory", "This is a Physical Inventory", "Cancel", and "Help". A note at the bottom states: "Note that inactive items and items with no name will be discarded."

Quantity On Hand (QOH)

- **Quantity On Hand (QOH) =**
 - Quantity counted at last physical inventory (PI)
 - + Sum of all items added since last PI
 - Sum of all items removed since last PI

QOH Screen

Inventory Status (QOH)				Mode: <input type="radio"/> Edit <input type="radio"/> Select			<input checked="" type="checkbox"/> Suppress repeating group name								
	Item Group	Item Name	Part #	Min Qty	Max Qty	Divisor	Last Physical Inventory		Net Add/Remove	Qty On Hand	By Lot	Standing Order Qty	Suggest Order		
							Date	Qty							
5	Excaliber Controls	LCHECK 3	47524	1	5	5	09 Oct 20...	12	-2	10	⊕		0		
13	Excaliber rgt	BUN	89895	1	5		19 Jul 2010	25		25	⊕		0		
1		CARB	47501	1	5	3	19 Jul 2010	20		20	⊕	0	0		
2		CEA	47502	1	5	1	19 Jul 2010		5	5	⊕	0	0		
3		CKMB	47503	1	5	3	19 Jul 2010		5	5			0		
4		CORT	47504	1	5	2	19 Jul 2010		5	5			0		
11		fsh	111555666	1	5		19 Jul 2010		5	5			0		
12		hcg	222463	1	20		19 Jul 2010		20	20			0		
▶ 18		T BILI	898976	1	6	2	19 Jul 2010		6	6	⊖		0		
								Last Physical Inventory							
				Lot Number		Expiration Date		Date		Qty		Net Add/Remove		Qty On Hand	
				▶ 898976.B		900233		30 Oct 2009		19 Jul 2010				0	
				898976.A		908616		30 Aug 2010		19 Jul 2010		6		6	
7		troponin	105698	1	7		19 Jul 2010		7	7	⊕		0		
15		TSH	5555566666	1	6	1	13 Apr 20...	0	6	6			0		

QOH Report

EP Evaluator®

Users Manual -- Data Innovations, Inc.

Inventory Status

Eximer rgt

PartNo	Item Name	Min Qty	Max Qty	Last Phys Inventory Date	Qty	Net Add/Remove	Quantity on Hand	Standing Order	Suggested Order
47501	CARB	4	10	02 Oct 2009	0	1	1	10	0
47502	CEA	2	10	02 Oct 2009	0	3	3	0	7
47503	CKMB	3	10	02 Oct 2009	0	7	7		3
47504	CORT	4	10	02 Oct 2009	0	0	0		10
5555566666	TSH	1	6	02 Oct 2009	0	1	1		5
898976	T BILI	2	6	02 Oct 2009	0	0	0		6

Eximer Controls

PartNo	Item Name	Min Qty	Max Qty	Last Phys Inventory Date	Qty	Net Add/Remove	Quantity on Hand	Standing Order	Suggested Order
47524	LCHECK 3	5	10	02 Oct 2009	0	4	4		6

Eximer Supplies

PartNo	Item Name	Min Qty	Max Qty	Last Phys Inventory Date	Qty	Net Add/Remove	Quantity on Hand	Standing Order	Suggested Order
99999	AAA Battery	1	3	02 Oct 2009	0	6	6	30	0

QOH: Suggested ordering

SIS [Example2]

File Edit Search Utilities Help

Setup Items QOH Lists Print Scanner Clipboard Refresh Back **Suggested Order = "Max" - QOH - Standing Order**

Inventory Status (QOH) Mode: Edit Select Suppress repeating group name

Item #	Item Group	Item Name	Part #	Min Qty	Max Qty	Divisor	Last Physical Inventory		Net Add/Remove	Qty On Hand	By Lot	Standing Order Qty	Suggest Order
							Date	Qty					
1	Eximer Reag...	CARB	47501	0	10	250	06 Jan 2007	3					0
2	Eximer Reag...	CEA	47502	0	10	10	06 Jan 2007	2					0
3	Eximer Reag...	CKMB	47503	0	10	500	06 Jan 2007	2					0
4	Eximer Reag...	CORT	47756	0	10	250	01 Jan 2007	2	-1	1	8		1
5	Eximer Reag...	CTNI	47505	0	10	500	06 Jan 2007	1		1	8		1
6	Eximer Reag...	DIG	47506	0	10	250	06 Jan 2007	5		5	8		0
7	Eximer Reag...	XXXXXXXXXX...	4750799999	0	10	500	06 Jan 2007	2		2	8		0
8	Eximer Reag...	FERR	47508	0	10	250	06 Jan 2007	10		10	8		0
9	Eximer Reag...	FOL	47509	0	10	500	06 Jan 2007	4		4	8		0
10	Eximer Reag...	FT4	47510	0	10	250	06 Jan 2007	1			8		1
11	Eximer Reag...	FSH	47511	0	10	500	06 Jan 2007	3			8		0
12	Eximer Reag...	LH	47512	0	10	300	06 Jan 2007	6			8		0
13	Eximer Reag...	PHENB	47513	0	10	50	01 Jan 2007	8	-8	0	8		2
14	Eximer Reag...	PHENTOIN	47514	0	10	250	01 Jan 2007	4	-4	0	8		2
16	Eximer Reag...	PROG	47515	0	10	50	06 Jan 2007	9		9	8		0
17	Eximer Reag...	PROL	47516	0	10	250	06 Jan 2007	2		2	8		0
18	Eximer Reag...	THCG	47723	0	10	250	06 Jan 2007	1		1	8		1
19	Eximer Reag...	T3	47518	0	10	400	01 Jan 2007	1	2	3	8		0

Record 1 of 85

Select All Select None With selected items do Create a new list Go

03 Jan 2008 6:59:18 AM Latest transaction: PI 06 Jan 2007 03:03:03 Logged on as Administrator (Administrators)

Yellow - Suggested order > 0

Red - QOH at or below "Min"

Shopping list on screen

- Modify quantities
- Add new lot numbers
- View total costs

ShopList (2): Shopping List											
Seq	Group	Item Name	Part Number	Lot Number	ExpDate	Vendor	Qty	Divisor	Unit Price	Total Price	
2	Eximer Reagents	CARB	47501			AAA	10	1	\$250.00	\$2,500.00	
5	Eximer Reagents	CKMB	47503					1	\$300.00	\$6,000.00	
9	Eximer Reagents	CORT	47504					1	\$250.00	\$7,500.00	
14	Eximer Supplies	AAA Battery	99999					1	\$150.00	\$6,000.00	

Print Barcode Label
Delete
Add New Lot

Shopping list for purchasing

EP Evaluator

Clinical Laboratory -- Kennett Community Hospital

Report organized by vendor
(if vendors defined), or by
Group if not

Shopping List Shopping list for vendor AAA

Long description for
purchasing dept.

AAA

ItemName	PartNumber	Qty	Description
CARB	47501	1	Carb Reagent, 250 Tests/Box
CEA	47502	2	CEA Reagent, 500 Tests/Box
AAABattery	99999	2	Battery, Size AAA (1cs=6bx=72bats)
Liquichek-3	B923[22]	1	BioRad, Liquichek, Tri-Level

Vendor part number, if defined

Shopping list for purchasing

EP Evaluator

Clinical Laboratory -- Kennett Community Hospital

Report organized by vendor
(if vendors defined), or by
Group if not

Shopping List Shopping list for vendor AAA

Long description for
purchasing dept.

AAA

ItemName	PartNumber	Qty	Description
CARB	47501	1	Carb Reagent, 250 Tests/Box
CEA	47502	2	CEA Reagent, 500 Tests/Box
AAABattery	99999	2	Battery, Size AAA (1cs=6bx=72bats)
Liquichek-3	B923[22]	1	BioRad, Liquichek, Tri-Level

Vendor part number, if defined

Shopping list for purchasing EE11.2

Simple Inventory System

EE 11.2.23 Webinar -- Community Hospital

Shopping List Shopping List

AAA

Part Num	Item Name	Description	Lot Num	Expiration	Qty	Unit Price	Total Price
47501	CARB	Carb Reagent, 250 Tests/Box			10	\$250.00	\$2,500.00
99999	AAA Battery	Battery, Size AAA (1cs=6bx=72bats)			40	\$150.00	\$6,000.00
Vendor Total							\$8,500.00

BBB

Part Num	Item Name	Description	Lot Num	Expiration	Qty	Unit Price	Total Price
47503	CKMB	CKmb reagent, 100 tests / box			20	\$300.00	\$6,000.00
47504	CORT	Cortisol reagent, 100 tests / box			30	\$250.00	\$7,500.00
Vendor Total							\$13,500.00
Grand Total							\$22,000.00

Receiving Inventory

- Using the shopping list
 - Print barcode labels
- Receive the Order
 - Attach labels to
 - Each item
 - A “clipboard”
 - Leftover labels = backorders
- Count received items and **Add to Inventory**
 - Scan the barcodes or
 - Use the shopping list



Tips and Tricks

setting up your SIS system

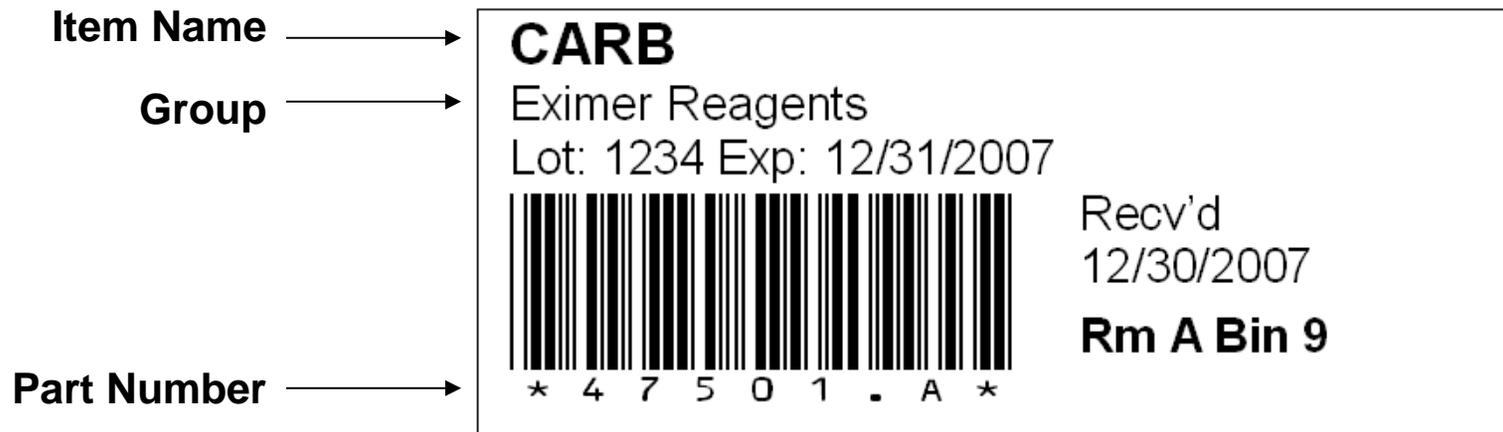
Navigational Roadmap

- **Starting SIS**
- **Key Screens**
 - Setup: connect barcode scanner
 - Items: define inventory items
 - QOH: current inventory status
 - Lists: make lists of items and quantities (e.g., shopping list, count sheet)
- **Reports**
- **Backup and Restore**

Demonstrate

Getting started

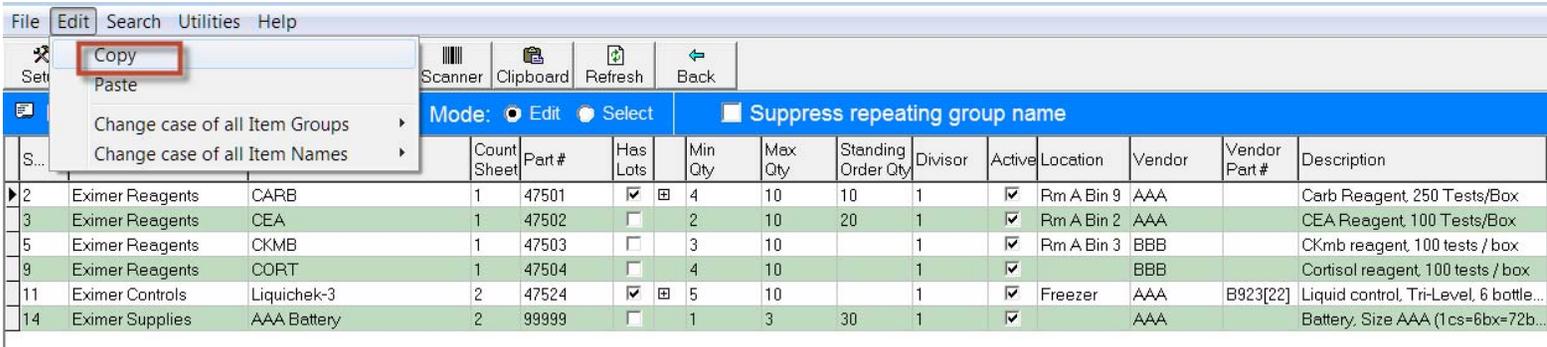
- **Define your items:**
 - Compile a list of inventory items,
 - Divide them into groups, and
 - Give them **short** (<=30 ch) names and part numbers – the labels may need to fit on small boxes



Entering your items: Master List of Inventory items

- Group name i.e. Reagents, controls, supplies
- Item name 30 chr.
- Entry of items in Edit Mode
 - Manually
 - INS key adds row above the highlight in same group
 - Enter after last line adds a row
 - Paste from Excel
 - Copy empty form to excel
 - Fill in and copy paste back to SIS
- Edit/ Select Toggle
 - Edit lets you change and update specific items.
 - Select lets you Do specific actions
 - Add to existing list
 - Delete
 - Print barcode labels (non expired)
 - Make active / inactive
 - Copy to the clipboard

Excel spreadsheet



ItemGroup	ItemName	CountSheet No	PartNo	HasLots	Min Qty	MaxQty	StandingQty	Divisor	Active	StdLocation	Vendor	VendorPart No	Description
Eximer Reagents	CARB	1	47501	Yes	4	10	10	1	Yes	Rm A Bin 9	AAA		Carb Reagent, 250 Tests/Box
Eximer Reagents	CEA	1	47502	No	2	10	20	1	Yes	Rm A Bin 2	AAA		CEA Reagent, 100 Tests/Box
Eximer Reagents	CKMB	1	47503	No	3	10		1	Yes	Rm A Bin 3	BBB		CKmb reagent, 100 tests / box
Eximer Reagents	CORT	1	47504	No	4	10		1	Yes		BBB		Cortisol reagent, 100 tests / box
Eximer Controls	Liquichek-3	2	47524	Yes	5	10		1	Yes	Freezer	AAA	B923[22]	Liquid control, Tri-Level, 6 bottles / box (2 of each level)
Eximer Supplies	AAA Battery	2	99999	No	1	3	30	1	Yes		AAA		Battery, Size AAA (1cs=6bx=72bats)

Defining items

- **Item Naming Examples**
 - **Good:** CARB (name) Eximer Reagents (group)
 - **Bad (*out of the catalog*):** Closure, Safety, Tainer Top, LAVENDER 10bags 10,000/cse [02-706-14]
- **30 char NAME, 16 char P/N - alphanumeric**
- **Longer Description names and (vendor) part numbers print on the Shopping list for purchasing. You can start with \$ price. (EE11.2 will have a separate price column)**
- **When all items are defined:**
 - **do an initial physical inventory**
 - **print barcode labels for existing stock**

Bar Codes with Lot Numbers

- Option on the print menu to include lot numbers

The image displays three barcode labels and a dialog box. The first label is for 'Liquichek-3' (Eximer Controls, Lot: 77777, Exp: 1/1/2008) with a barcode and the text 'Recv'd 2/10/2009 Freezer' and '* 4 7 5 2 4 . A *'. The second label is for 'Liquichek-3' (Eximer Controls, Lot: 66666, Exp: 2/2/2008) with a barcode and the text 'Recv'd 2/10/2009 Freezer' and '* 4 7 5 2 4 . C *'. The third label is for 'AAA Battery' (Eximer Supplies) with a barcode and the text 'Recv'd 2/10/2009' and '* 9 9 9 9 *'. The 'Print Barcode Labels' dialog box shows the printer set to 'Microsoft Office Document Image Writer', with checkboxes for 'Print Date Received' (2/10/2009), 'Print Lot Number', and 'Print Location' all checked. Under 'Number of Labels', 'One label for each item' is selected.

Items set up Tips

- **Create all group names first.**
 - Add one part number to each group
 - put items in the category (group) order you want to see on the count sheets.
 - Organize alphabetically or
 - Organize by group name with the lowest sequence number, and then by sequence number. You can change the sequence number using the up/down arrows   at the bottom of the screen.
 - Group name lowest req number
 - Item names in sequence order within the group.
 - Then group name with next lowest sequence number.

More Features

- **Items screen**
 - Sort by “Has lots” column
 - 30 character names
 - create shopping lists and count sheets from the QOH screen
 - **Set Sequence Order utility**
 - Arrange items in groups,
 - Change the group name for all items assigned to it,
 - Move items from one group to another.
 - tied to the security permission of "modify inventory items" which is only assigned to Administrators by default.
- **QOH screen**
 - produce a QOH report using a subset of selected items on the QOH screen.
- **Shopping lists**
 - The Shopping List Report includes Lot Number and Expiration Date columns.
 - non-expired lot numbers are shown on a separate report line
 - items with lots has a line with a blank lot number so users can write in a new lot number.

EE9.4 and higher

- **Barcode labels**
 - All of the Items in the Shopping list can have barcodes printed, with multiple barcodes printing for items with more than one non-expired lot.
 - No barcodes print for expired lots.
- **The File\Transaction Viewer shows the user login name who made a change, and which lot number**
- **Adding new lots**
 - Items screen: Add a new line in the items screen lot number popup by pressing enter on the last line
 - Shopping list: Right click in the lot number field on a shopping list when new inventory is received.
 - Cannot enter in count sheet
- **Utilities menu:**
 - 'Database Check' reveals potential setup problems on the Items screen that may result in some items missing on reports.
 - error count is displayed at the bottom of the Items screen, indicating that the DB Checker should be reviewed for errors.

First Time Physical Inventory: Using count sheets created in QOH screen

- **Create Master items list**
- **Switch to QOH**
- **Select All and “With Selected items Do”:**
 - **Set inventory to zero**
- **Create a new count list 2 ways in QOH screen**
 - **Dropdown list for selected items or**
 - **Icon toolbar “Lists”: Make count sheets**
- **Count sheets include all active items.**
 - **A count list created from Master items gives you blank quantities for first time inventories**
 - **A count list created from the LISTS menu gives you current quantities and space to write in corrected quantities**

Logisitics

- **Where to put the barcode label**
 - On the box?
 - On the storeroom shelf?
 - Have a clipboard of labels in the storeroom?
- **Do you want to count fractional boxes (“bottles”) or whole boxes?**
 - Check the box for “divisor” when subtracting bottles
 - Don’t check when adding Whole boxes to inventory
- **Do you want to keep track of lot numbers? Date received? Locations?**
- **You need a printer (preferably a laser printer) for printing bar code labels**

Security Options

- 1. Each department can have its own DB And its own security**
 1. Administrators – sets everything up
 2. Operators – day to day users
 3. Guests – Can look but not touch
- 2. Administrators: Add a new user(s) to serve as administrator.**
 - 1. Each database MUST have at least one administrator. WE recommend two.**
 - 2. Edit the default “admin” user and uncheck the Enabled box.**
 1. It won't be visible when it is disabled, but it will still be in the system.
 2. Do not delete admin or change its user name or administrative functions..
 3. By leaving the disabled admin account in the system, you can regain access to your database with a call to Data Innovations support if all your administrators lose (forget) their login information. (or get hit by a bus)
 - 3. Delete the “operator” account.**
 1. Add a new account for each user who will enter inventory transactions.
 - 4. Leave the guest account as-is.**
 1. Anyone can log in as guest, with no password, and see the data, but he/she can't edit it.

Case Study – SIS improved efficiency

- **The Chemistry department of a 150 Bed Hospital in the Bay area implemented SIS with bar code scanner within the last year.**
- **Formerly:**
 - They were recording purchases and disbursements using sticky notes and MS Excel.
 - Frequent stock outs and AdHoc ordering of supplies
 - Doing physical inventory weekly.
 - Time consuming and tedious tasks

Case Study: NOW

- **Staff can easily use the scanner to decrement stock.**
- **Physical inventory now done less than once per month**
- **Shopping lists manage ordering to planned events. – no emergency Ad Hoc ordering**
- **Inventory Tracking chores for this department have been cut in half both in lab and in materials management**

Starter Kit

- You may purchase an Inventory Starter Kit from Data Innovations for \$450
- Includes three Symbol CS1504 bar code scanners and a 100-sheet box of Avery 8460 Labels
- P/N: EE-G-BAR-SK01

Lists

- **Create from selections in Item Screen or QOH screen**
 - Select all, or make custom lists.
- **From the QOH screen**
 - Create a new list, ie. Count list, shopping list
 - Default quantities shown are suggested order quantities.
- **From the item screen.**
 - create a customized count sheet list only from item screen.
 - Default quantities are blank

FAQs

- **How do I handle partial orders received.**
 - Duplicate your shopping list and delete those items received. Use the new list to manage items as they trickle in.
- **My purchasing dept needs cost info. What do I do.**
 - Consider putting your cost info at the beginning of the full description line. EE11.2 will have cost info.
- **I want to put the same items in different locations.**
 - Consider calling a different location a different lot #
- **Vendor makes frequent part number changes.**
 - Add the new part numbers as soon as you know about it.
 - Don't be in a hurry to inactivate the old P/N.
 - Will old stock be scrapped?

For more Information

- **EE User's Guide chapter 33**
- **Context sensitive HELP**

Questions and Discussion



ee.datainnovations.com

802-658-1955