



DLCPM Enterprise 2018

Inventory Management

User Guide

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What is DLCPM Inventory?

DLCPM Inventory is designed to track consumables (materials such as powder) and items or products sold which are not part of the manufacturing process (for example, an implant screw). The inventory system utilizes the two existing parts of DLCPM, namely Material and Products to build the inventory items. The inventory items are depleted in two ways:

1. If an inventory item is defined as a product, the inventory quantity is reduced nightly when the automation job runs based on products entered on invoiced cases.
2. A technician can check out an item defined as a material or consumable.

The DLCPM Inventory system also includes definitions for Vendors and Purchase Orders (PO). Labs may create a purchase order with desired Vendors and receive the PO to update their inventory count. The PO requests may be sent automatically to the Vendor as well.

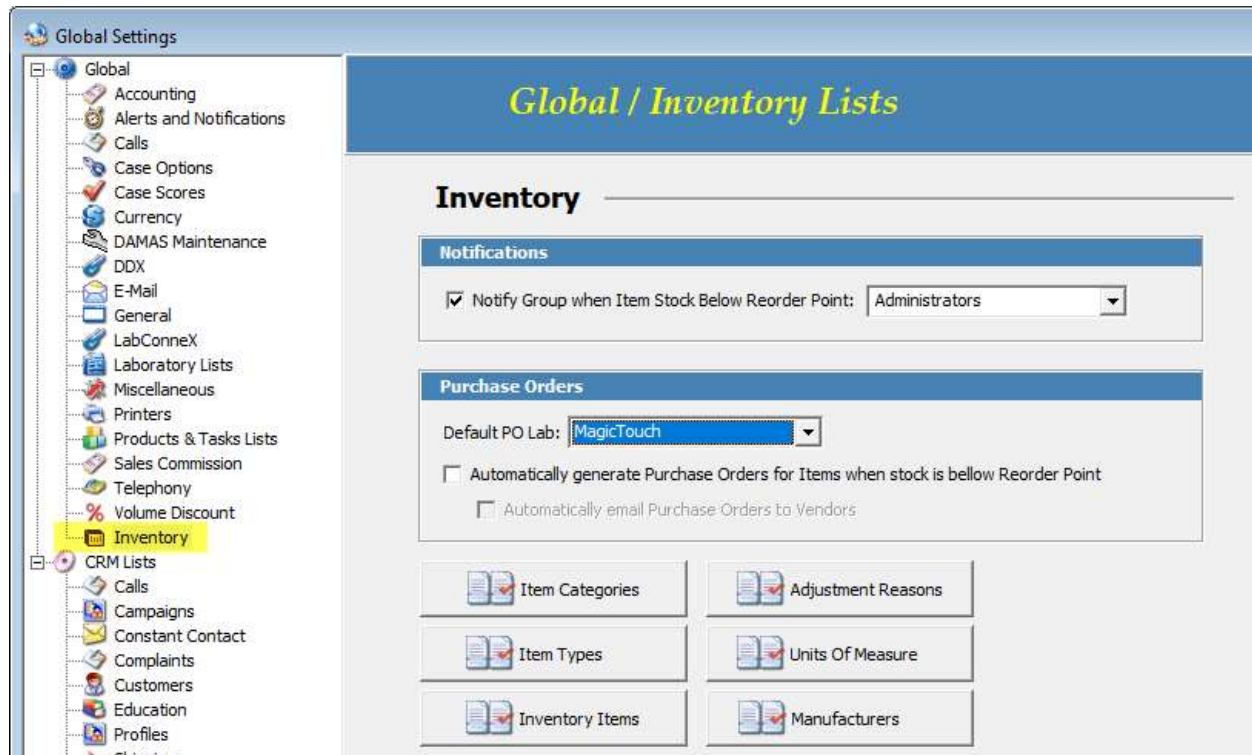
Here is a brief list of Inventory Features and Functions:

- Create list of Vendors
- Create inventory item list from existing Materials or Products
- Assign preferred Vendor for each Inventory item
- Generate and Receive Purchase Order(s)
- Email Purchase Order to Vendor manually or automatically each night
- Inventory Checkout for Technicians

Inventory Setup

(File > Global Settings > Inventory)

This section of the Global Settings is where you will configure all of the maintenance lists for Inventory. Each section must be completed with the appropriate selections and definitions.



Item Categories

(File > Global Settings > Item Categories)

The item categories can be used to group and organize the entries in your inventory items list.

Item Types

(File > Global Settings > Item Types)

In addition to the item category definition, it is also important to define an organized list of item types.

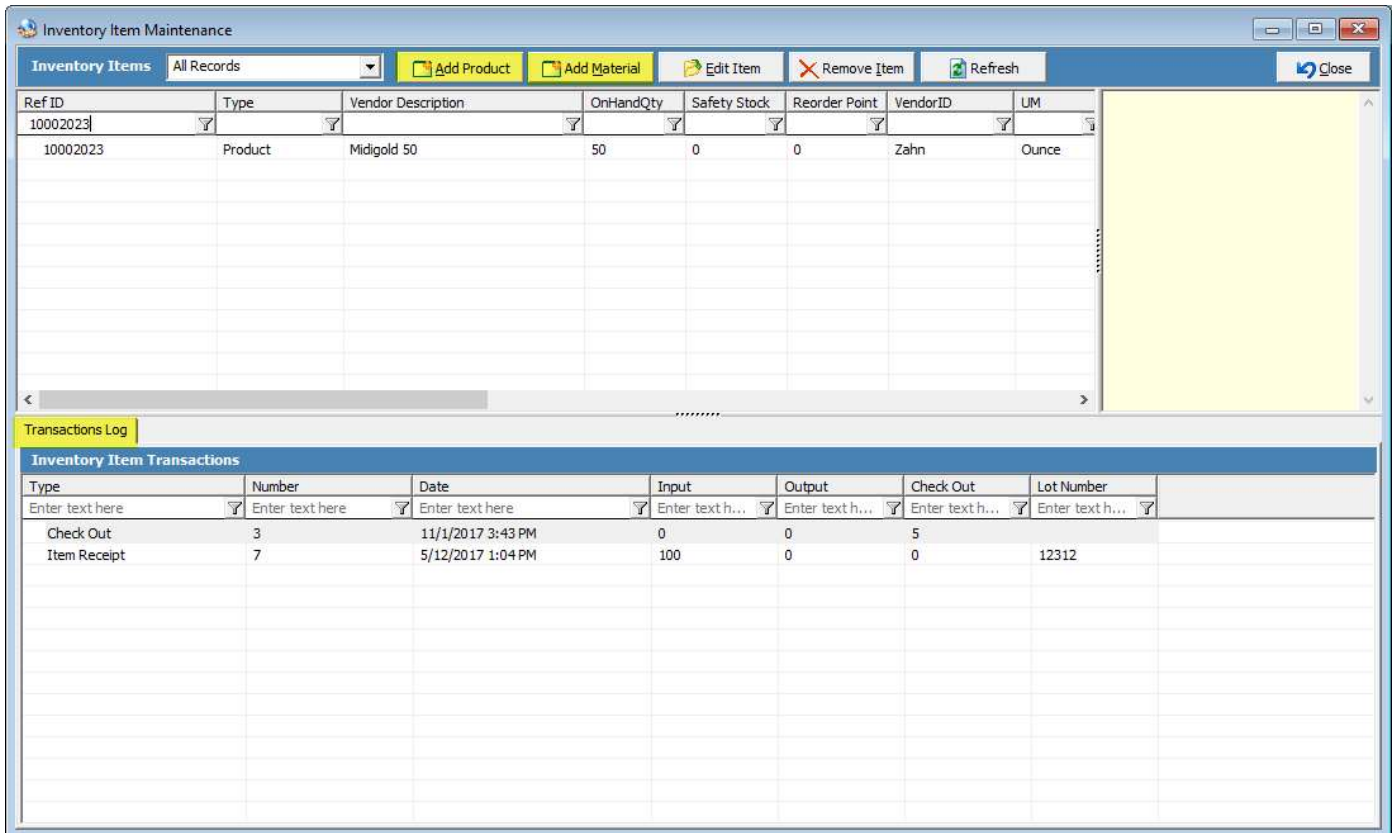
Please note: Both of the category and type definitions on inventory items are designed solely for lab organization and do not have a direct impact on the behavior of the inventory system.

Inventory Items

(File > Global Settings > Inventory Items)

An Inventory Item could be either a Product or Material. A product could be something that you sell, such as a Milling Block. A material would be an item that is used in making a product, such as gold or porcelain powder. All of the items defined in the item maintenance is what you will be able to keep record of by depleting or adjusting inventory amounts.

On this form there is also a tab called Transactions Log, which will log all activity for the selected inventory item. Each log will list the type of transaction, timestamp and if the inventory was increased or decreased. If an inventory item was checked out, a log will list on this tab as well.



The screenshot shows the 'Inventory Item Maintenance' window with the 'Transactions Log' tab selected. The window has a toolbar with buttons for 'Add Product', 'Add Material', 'Edit Item', 'Remove Item', 'Refresh', and 'Close'. The main area is divided into two sections: 'Inventory Items' and 'Inventory Item Transactions'.

Inventory Items Table:

Ref ID	Type	Vendor Description	OnHandQty	Safety Stock	Reorder Point	VendorID	UM
10002023	Product	Midigold 50	50	0	0	Zahn	Ounce

Inventory Item Transactions Table:

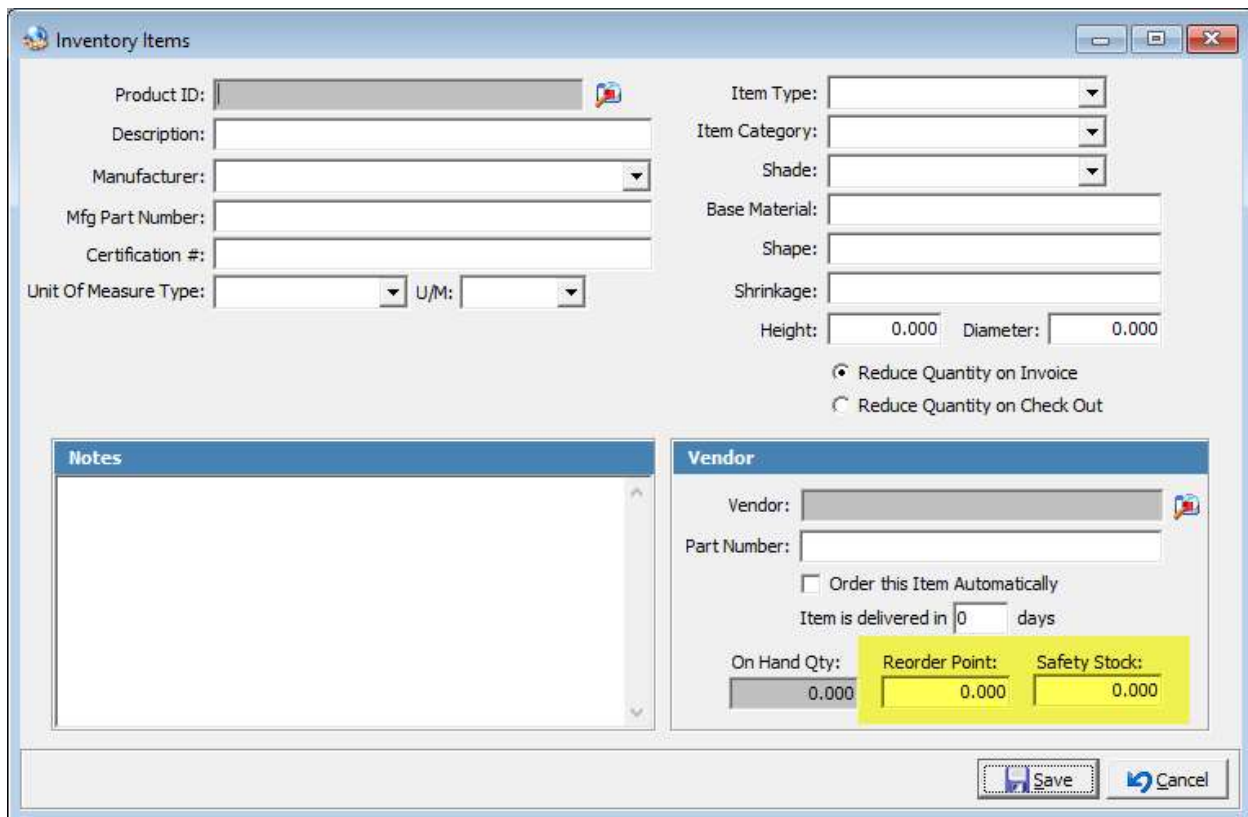
Type	Number	Date	Input	Output	Check Out	Lot Number
Check Out	3	11/1/2017 3:43 PM	0	0	5	
Item Receipt	7	5/12/2017 1:04 PM	100	0	0	12312

Reorder Point and Safety Stock for Inventory Item

(File > Global Settings > Inventory Items > Add/Edit Inventory Item)

When adding or editing inventory items in the inventory item maintenance list, it is important to configure all definitions and properties on the inventory item.

In the Vendor section, you can define both the Reorder Point and Safety Stock amounts.



The screenshot shows the 'Inventory Items' window with the following fields and sections:

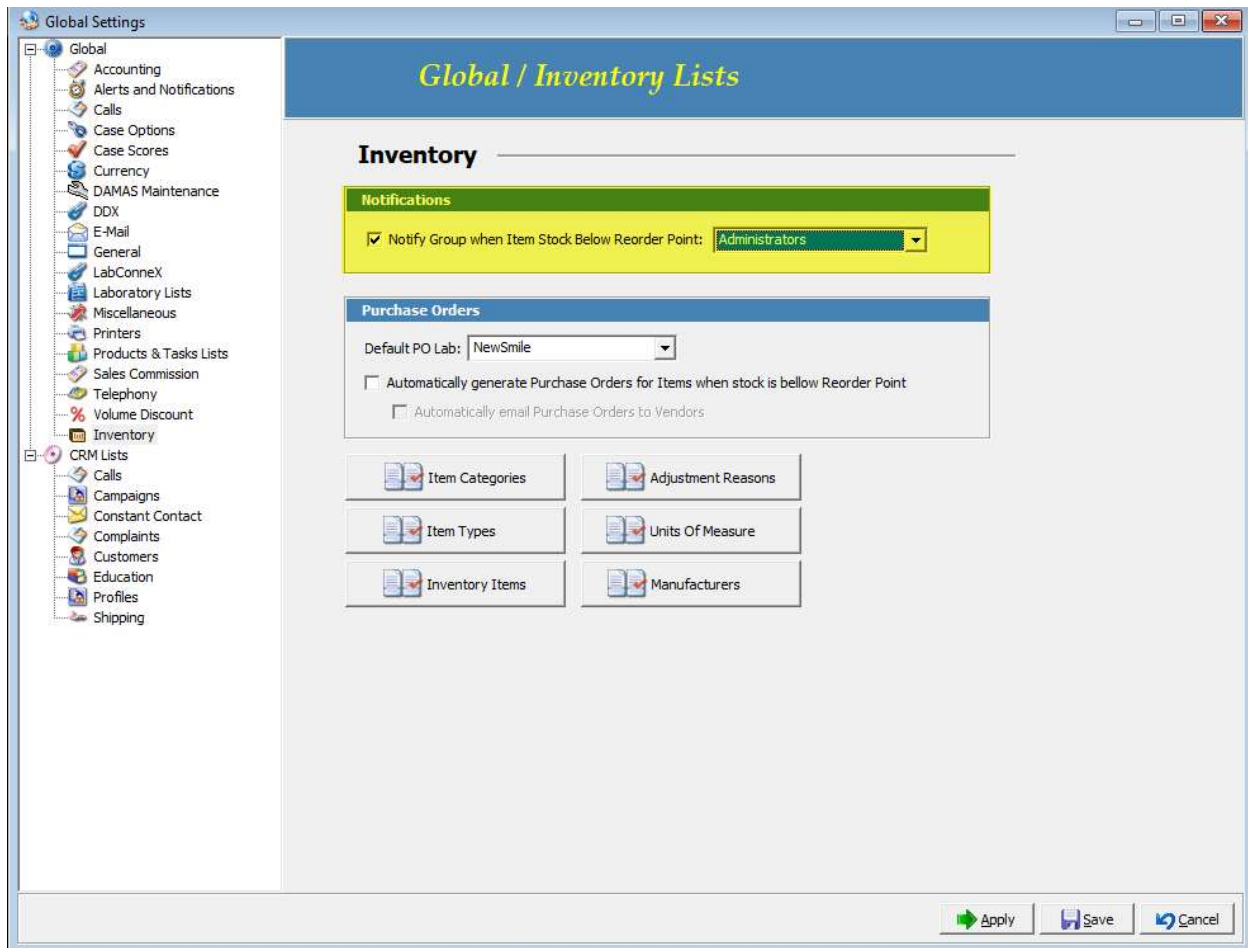
- Product ID:** [Text Field]
- Description:** [Text Field]
- Manufacturer:** [Dropdown Menu]
- Mfg Part Number:** [Text Field]
- Certification #:** [Text Field]
- Unit Of Measure Type:** [Dropdown Menu]
- U/M:** [Dropdown Menu]
- Item Type:** [Dropdown Menu]
- Item Category:** [Dropdown Menu]
- Shade:** [Dropdown Menu]
- Base Material:** [Text Field]
- Shape:** [Text Field]
- Shrinkage:** [Text Field]
- Height:** [Text Field] 0.000
- Diameter:** [Text Field] 0.000
- ☒ Reduce Quantity on Invoice
- ☐ Reduce Quantity on Check Out
- Notes:** [Text Area]
- Vendor:** [Text Field]
- Part Number:** [Text Field]
- ☐ Order this Item Automatically
- Item is delivered in [Text Field] 0 days
- On Hand Qty:** [Text Field] 0.000
- Reorder Point:** [Text Field] 0.000 (highlighted in yellow)
- Safety Stock:** [Text Field] 0.000 (highlighted in yellow)
- Save** [Button]
- Cancel** [Button]

The reorder point field is used to define the quantity of when you will need to reorder that inventory item. Additionally, located in the Inventory section of the Global Settings is a checkbox option which you can set if you would like to automatically generate a Purchase Order when the item quantity has reached the set reorder point.

The Safety Stock is a similar feature but is primarily used to alert users when an inventory item is running low. When the inventory item reaches the defined safety stock quantity, an alert will populate notifying the user that this item has reached or is below the set safety stock.

Please note: the reorder point must be equal to or less than the set safety stock.

In the Inventory Section of the Global Settings, there is a checkbox option and drop down menu to select for which users will be notified when the item is below the safety stock or reorder point.



The groups listed in this drop down menu are groups defined and configured in the System Admin Program. Users that are a member of the selected group will receive the following alert ePop message:



In order for these notifications to populate, the job located in the Job Management called *Generate Low Stock Inventory Notification* must be active.



Adjustment Reasons

(File > Global Settings > Adjustment Reasons)

If there are any manual adjustments that need to be made to inventory items, it is required to select a reason when adding an adjustment. On adjustments, you are able to increase or decrease the quantity of specific items.

Units of Measure

(File > Global Settings > Units of Measure)

For each inventory item that is defined in the items maintenance, you are able to set a unit of measure type. The list you define in the maintenance list for units of measure is what users will have to select from.

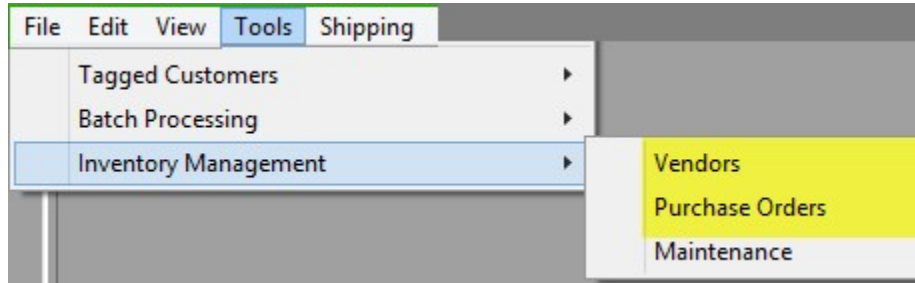
Manufacturers

(File > Global Settings > Manufacturers)

On each inventory item that is defined in the items maintenance list, you are able to keep record of manufacturer of that item, if applicable. The list you define in the manufacturers maintenance list is what users will have to select from.

Vendors & Purchase Orders

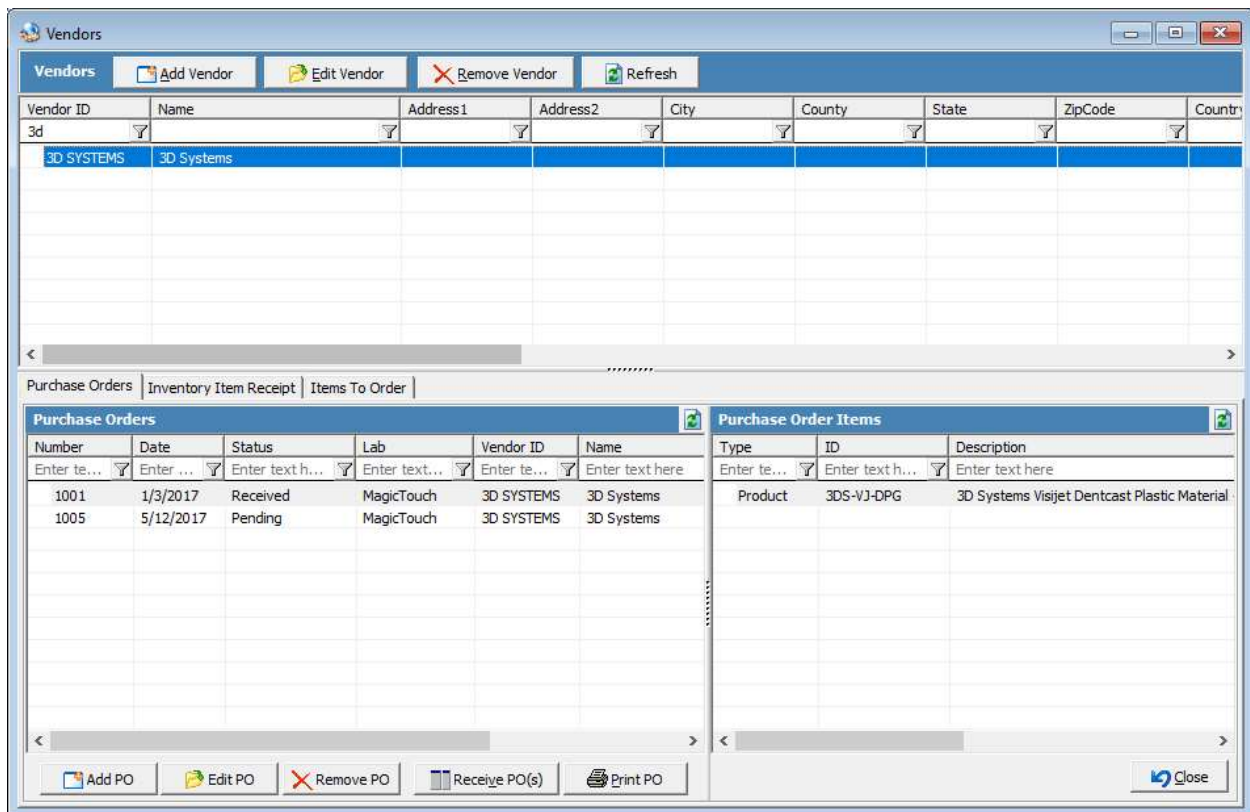
(Tools > Inventory Management)



Vendors

(Tools > Inventory Management > Vendors)

In the Vendors section of the Inventory Management menu is where you will define the Vendors which inventory items are ordered from. From the Vendors menu, you are able to add new vendors, or edit and remove an existing vendor. Within each selected vendor, you are able to generate Purchase Orders, Item Receipts and Inventory items to order.



Vendor ID	Name	Address1	Address2	City	County	State	ZipCode	Country
3d	3D Systems							

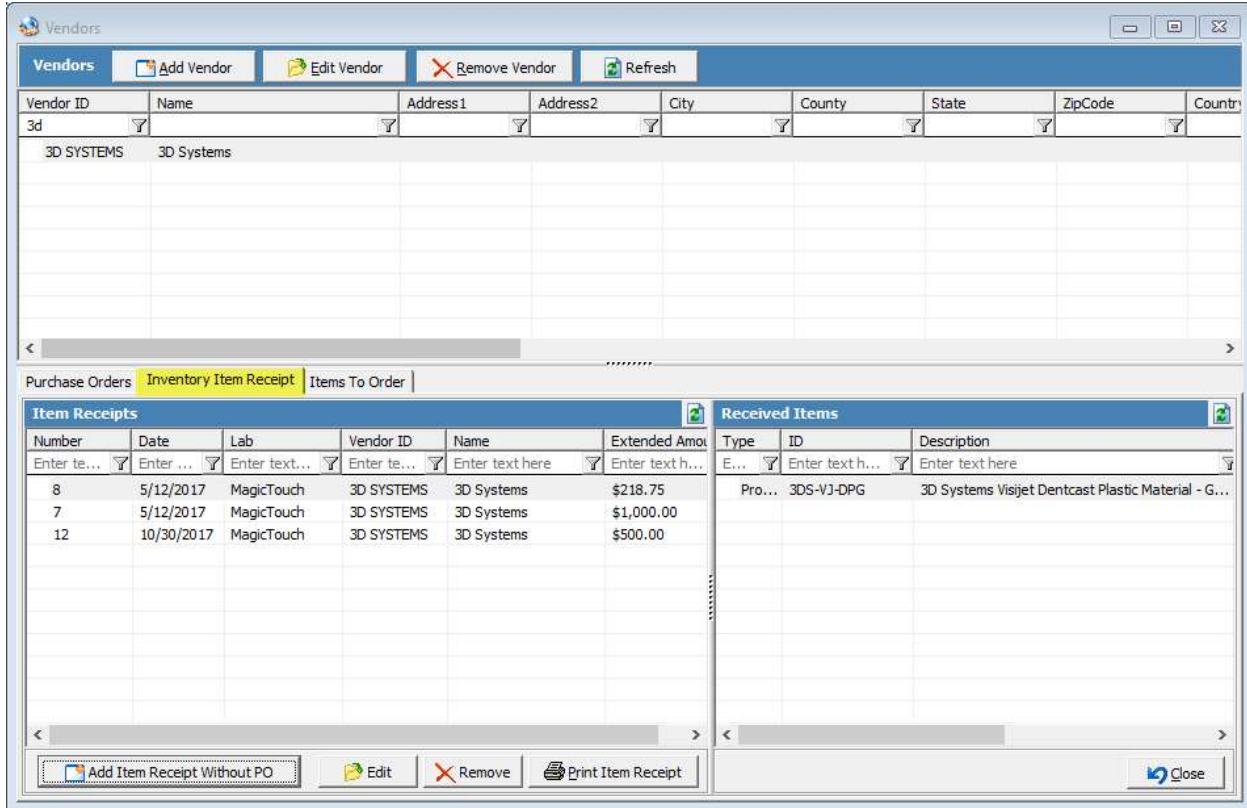
Number	Date	Status	Lab	Vendor ID	Name
1001	1/3/2017	Received	MagicTouch	3D SYSTEMS	3D Systems
1005	5/12/2017	Pending	MagicTouch	3D SYSTEMS	3D Systems

Type	ID	Description
Product	3DS-VJ-DPG	3D Systems Visijet Dentcast Plastic Material

Inventory Item Receipt

(Tools > Inventory Management > Vendors > Inventory Item Receipt)

The inventory item receipt tab allows for you to record inventory items under a specified vendor without reference to a purchase order.



The screenshot shows the 'Vendors' window with the 'Inventory Item Receipt' tab selected. The window is divided into two main sections: 'Item Receipts' and 'Received Items'.

Item Receipts Table:

Number	Date	Lab	Vendor ID	Name	Extended Amount
8	5/12/2017	MagicTouch	3D SYSTEMS	3D Systems	\$218.75
7	5/12/2017	MagicTouch	3D SYSTEMS	3D Systems	\$1,000.00
12	10/30/2017	MagicTouch	3D SYSTEMS	3D Systems	\$500.00

Received Items Table:

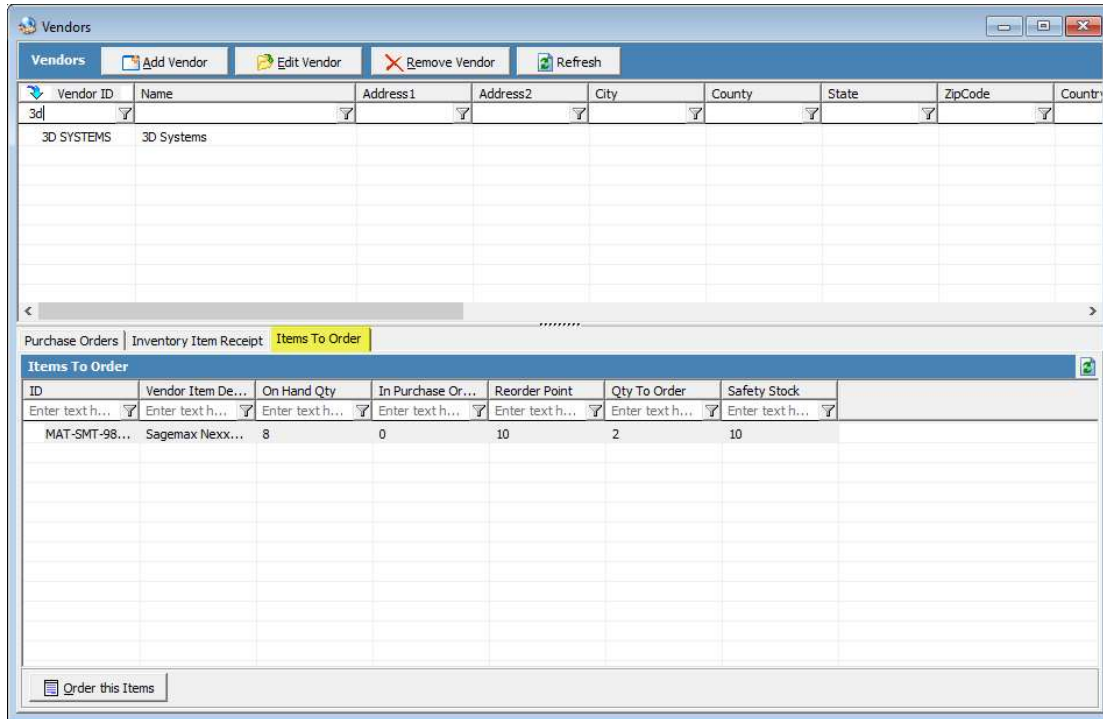
Type	ID	Description
Pro...	3DS-VJ-DPG	3D Systems Visijet Dentcast Plastic Material - G...

Buttons: Add Vendor, Edit Vendor, Remove Vendor, Refresh, Add Item Receipt Without PO, Edit, Remove, Print Item Receipt, Close.

Items To Order

(Tools > Inventory Management > Vendors > Items To Order)

The inventory items that are close to the reorder or safety stock quantity will display on the items to order tab. This will allow users to select the option to reorder those items.



Vendor ID	Name	Address1	Address2	City	County	State	ZipCode	Country
3d	3D SYSTEMS							

ID	Vendor Item De...	On Hand Qty	In Purchase Or...	Reorder Point	Qty To Order	Safety Stock
Enter text h...	Enter text h...	Enter text h...	Enter text h...	Enter text h...	Enter text h...	Enter text h...
MAT-SMT-98...	Sagemax Nexx...	8	0	10	2	10

Order this Items

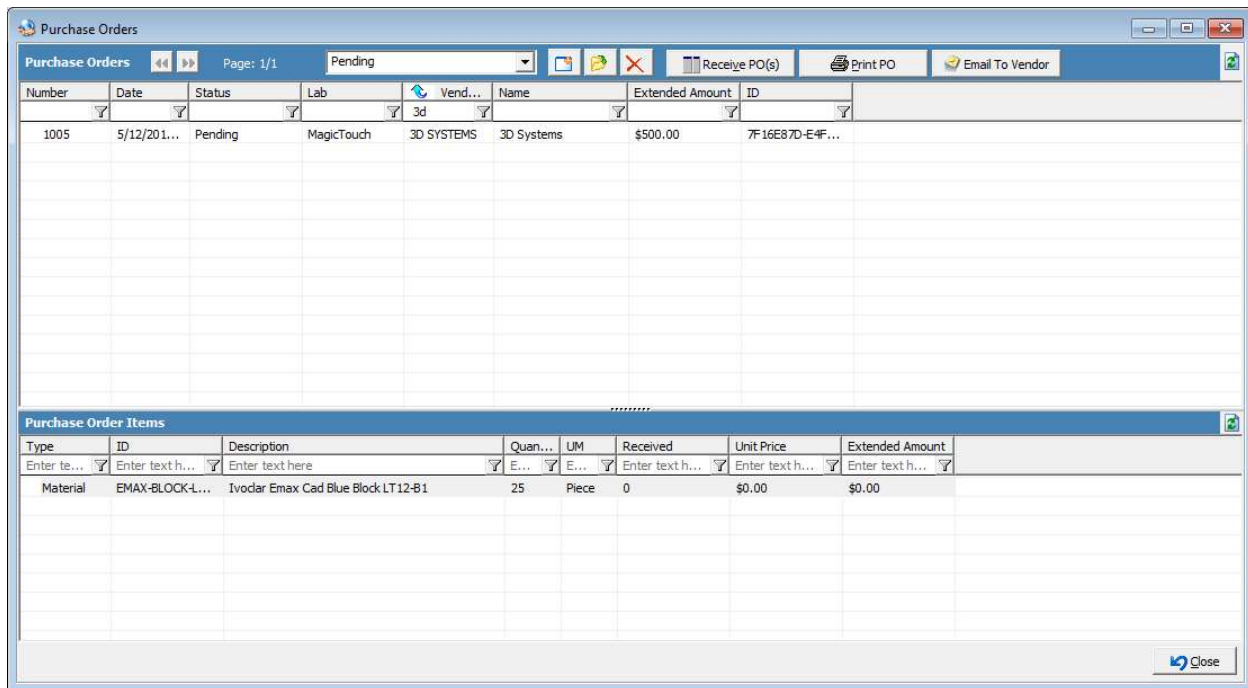
Purchase Orders

(Tools > Inventory Management > Purchase Orders)

The Purchase Orders module is used to manage all inventory purchase orders. When adding a purchase order, the purchase order number will automatically generate once the purchase order has been saved.

From this form, users may select to receive or print a purchase order.

Please note: Users are also able to Add, Receive, Edit, Remove, or Print Purchase Orders from the Vendors module as well.



The screenshot shows the 'Purchase Orders' window. At the top, there's a title bar and a menu bar with options like 'Receive PO(s)', 'Print PO', and 'Email To Vendor'. Below the menu bar is a table with columns: Number, Date, Status, Lab, Vend..., Name, Extended Amount, and ID. The first row shows a purchase order with Number 1005, Date 5/12/2011, Status Pending, Lab MagicTouch, Vend... 3d, Name 3D SYSTEMS, Extended Amount \$500.00, and ID 7F16E87D-E4F... Below this table is a section titled 'Purchase Order Items' with a table that has columns: Type, ID, Description, Quan..., UM, Received, Unit Price, and Extended Amount. The first row in this table shows a material item with Type Material, ID EMAX-BLOCK-L..., Description Ivoclar Emax Cad Blue Block LT12-B1, Quan... 25, UM Piece, Received 0, Unit Price \$0.00, and Extended Amount \$0.00. At the bottom right of the window is a 'Close' button.

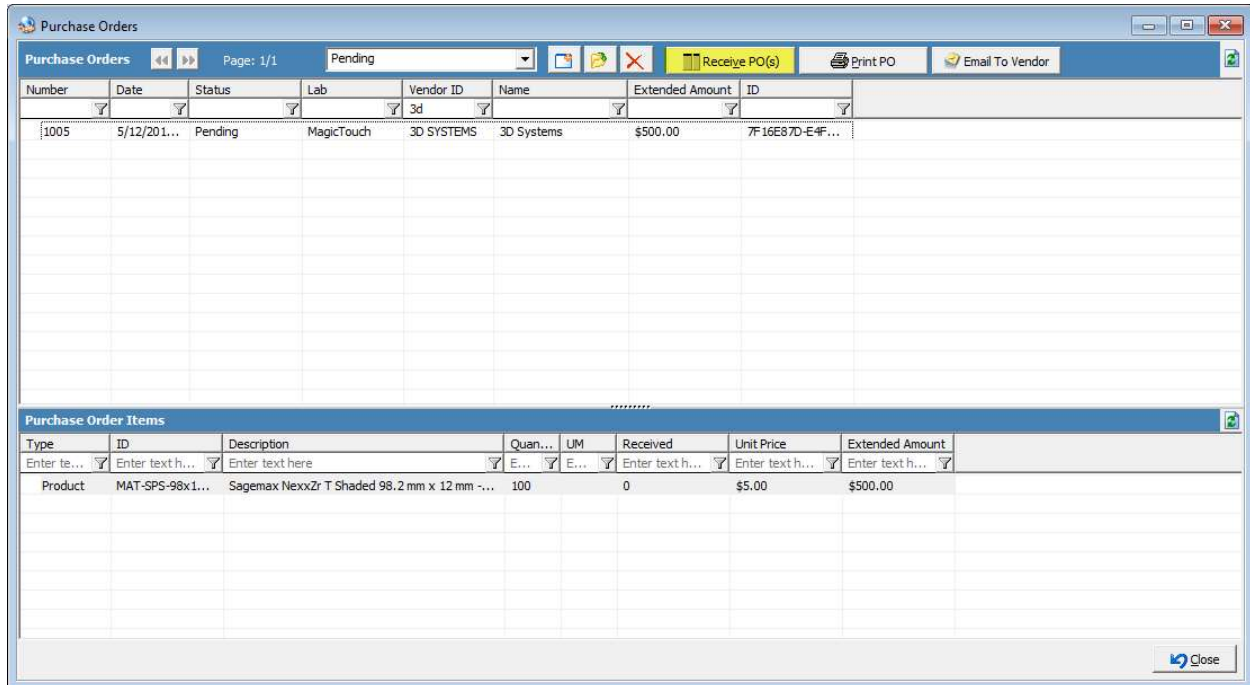
Number	Date	Status	Lab	Vend...	Name	Extended Amount	ID
1005	5/12/2011...	Pending	MagicTouch	3d	3D SYSTEMS	\$500.00	7F16E87D-E4F...

Type	ID	Description	Quan...	UM	Received	Unit Price	Extended Amount
Material	EMAX-BLOCK-L...	Ivoclar Emax Cad Blue Block LT12-B1	25	Piece	0	\$0.00	\$0.00

Receive Purchase Order

(Tools > Inventory Management > Purchase Orders > Receive PO(s))

In order to keep record of and mark a purchase as received from the vendor, you will select the option for Receive PO(s) from the toolbar. This will change the highlighted purchase order's status from Pending to Received. Multiple Purchase Orders may be received by using Shift+Click.



Number	Date	Status	Lab	Vendor ID	Name	Extended Amount	ID
1005	5/12/201...	Pending	MagicTouch	3d	3D Systems	\$500.00	7F16E87D-E4F...

Type	ID	Description	Quan...	UM	Received	Unit Price	Extended Amount
Product	MAT-SPS-98x1...	Sagemax NexxZr T Shaded 98.2 mm x 12 mm -...	100		0	\$5.00	\$500.00

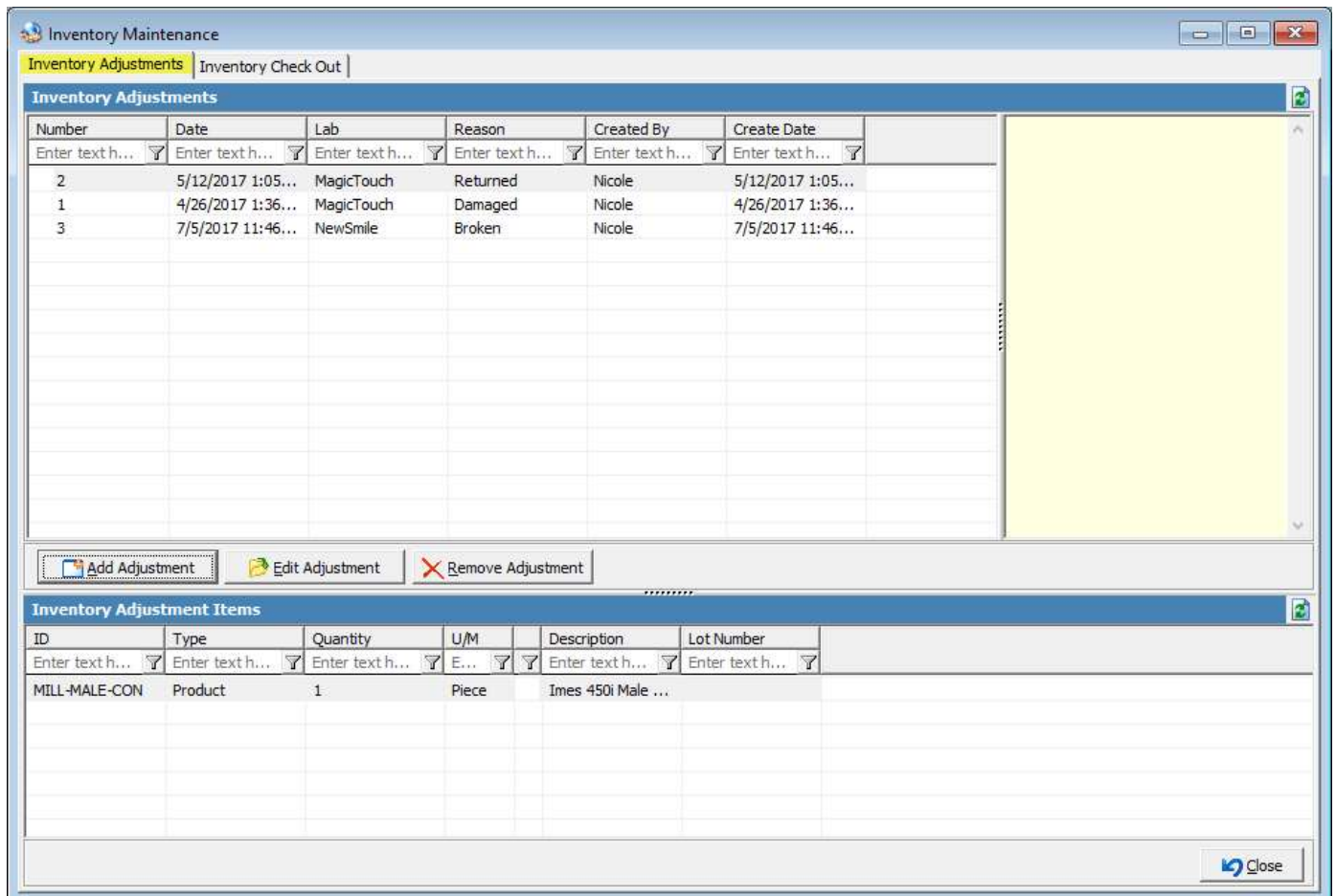
Inventory Maintenance

(Tools > Inventory Management > Maintenance)

Inventory Adjustments

(Tools > Inventory Management > Maintenance > Inventory Adjustments)

To manually adjust inventory levels, you will use the Inventory Adjustments tab found in the Inventory Maintenance module.



The screenshot shows the 'Inventory Maintenance' window with the 'Inventory Adjustments' tab selected. The window contains two main tables and a set of action buttons.

Inventory Adjustments Table:

Number	Date	Lab	Reason	Created By	Create Date
2	5/12/2017 1:05...	MagicTouch	Returned	Nicole	5/12/2017 1:05...
1	4/26/2017 1:36...	MagicTouch	Damaged	Nicole	4/26/2017 1:36...
3	7/5/2017 11:46...	NewSmile	Broken	Nicole	7/5/2017 11:46...

Inventory Adjustment Items Table:

ID	Type	Quantity	U/M	Description	Lot Number
MILL-MALE-CON	Product	1	Piece	Imes 450i Male ...	

Action Buttons: Add Adjustment, Edit Adjustment, Remove Adjustment

Close Button: Close

From this tab you can select to Add an adjustment and from the adjustment form it is important to select a reason for the adjustment and capture any notes related to this adjustment.

[illegible]

Within the add adjustments form, you will select to add an item and it is important to enter a lot number (if applicable) and select whether this adjustment will increase or decrease quantity of that item.

The screenshot displays the 'Inventory Adjustment' application interface. A modal dialog box titled 'Inventory Adjustment Items' is open in the foreground. This dialog contains the following elements:

- Item ID:** A text input field with a small icon to its right.
- Description:** A text input field.
- Lot Number:** A text input field.
- Quantity:** A text input field containing the value '1.000'.
- Quantity Adjustment:** Two radio buttons are present: 'Increase Quantity' (which is selected) and 'Decrease Quantity'.
- Buttons:** At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

In the background, the main 'Inventory Adjustment' window is visible. It includes:

- Fields:** 'Number' (with value '0'), 'Reason' (dropdown), 'Lab' (dropdown), and 'Date' (with value '10/30/2017').
- Notes:** A text area for additional notes.
- Table:** A table with columns 'ID', 'Type', and 'Quantity'. The first row contains the text 'Enter text h...' in each column.
- Footer:** A bar with 'Add Item', 'Edit Item', and 'Remove Item' buttons.

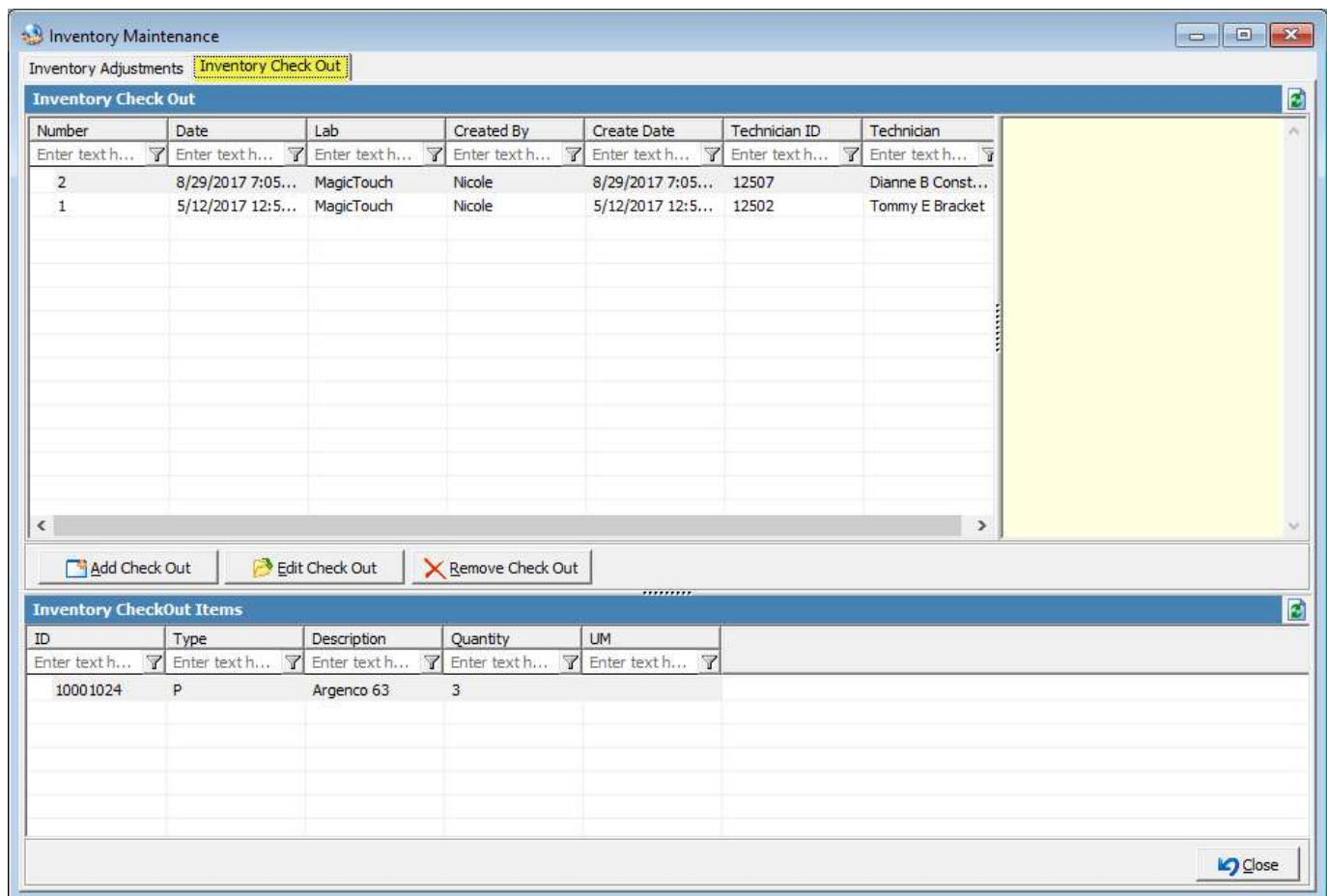
Inventory Check Out

(Tools > Inventory Management > Maintenance > Inventory Check Out)

When a technician uses items defined in inventory, the check out feature should be created to reflect the depletion of inventory. On each inventory item added into the item maintenance, the option for 'Reduce Quantity on Check out' must be checked in order to reduce the inventory on the item during check out.

Inventory Check Out logs are created from the Inventory Check Out tab within the Inventory Maintenance module.

Please note: In order for an inventory item to reduce using the check out feature, the property for 'Reduce Quantity on Check Out' must be set.



The screenshot shows the 'Inventory Maintenance' window with the 'Inventory Check Out' tab selected. The window contains two main sections: 'Inventory Check Out' and 'Inventory CheckOut Items'.

Inventory Check Out Table:

Number	Date	Lab	Created By	Create Date	Technician ID	Technician
2	8/29/2017 7:05...	MagicTouch	Nicole	8/29/2017 7:05...	12507	Dianne B Const...
1	5/12/2017 12:5...	MagicTouch	Nicole	5/12/2017 12:5...	12502	Tommy E Bracket

Below the table are three buttons: 'Add Check Out', 'Edit Check Out', and 'Remove Check Out'.

Inventory CheckOut Items Table:

ID	Type	Description	Quantity	UM
10001024	P	Argenco 63	3	

The window also features a 'Close' button in the bottom right corner.

Reducing Inventory on Invoicing

In addition to the adjustment and check out options, inventory can also deplete when cases are invoiced. On each inventory item added into the Item maintenance, the option for 'Reduce Quantity on Invoice' will reduce inventory for those products or materials that are on invoiced case.

When a product or material that is defined as an inventory item is entered on an invoiced case, the inventory for those items will reduce when the nightly automation job is run.

[illegible]

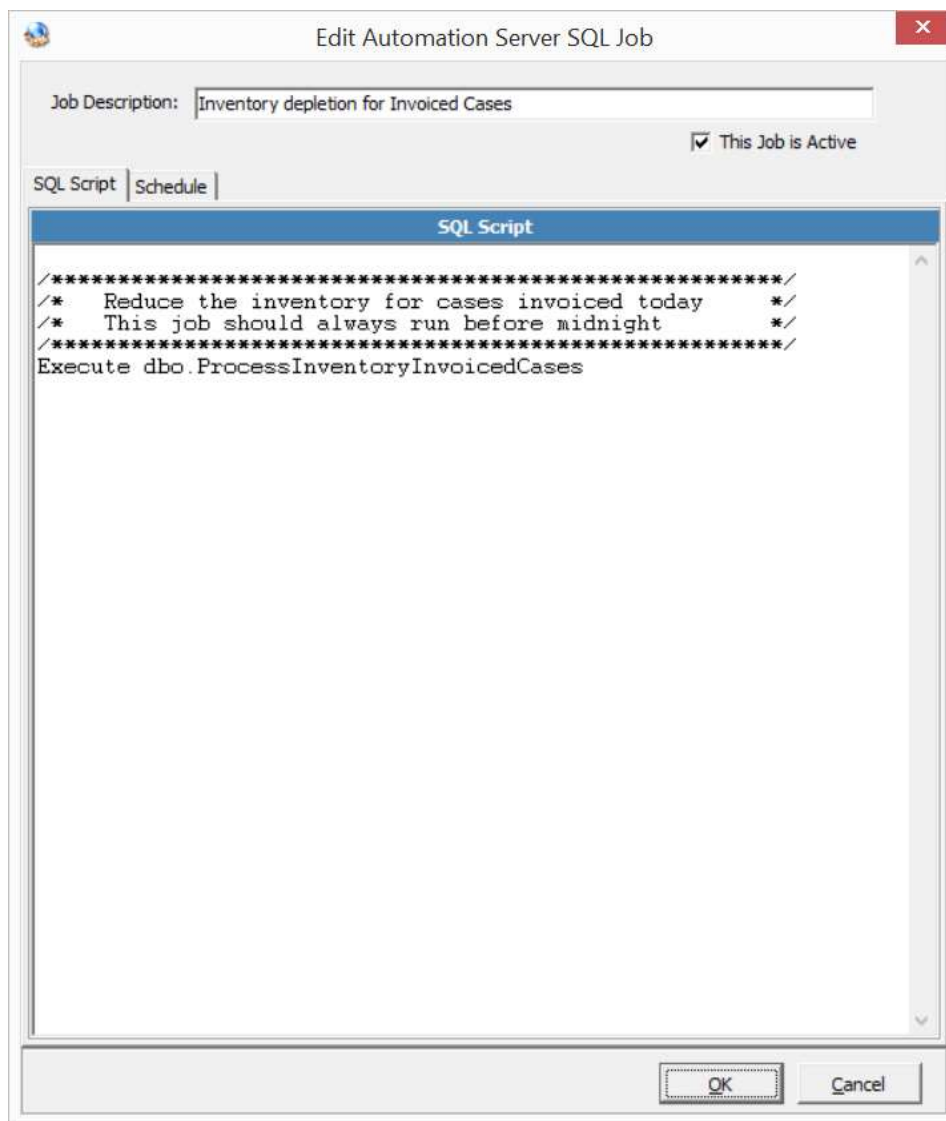
Please note: If users select to un-invoice a case with inventory items, this will not affect the inventory quantity for those items.

Inventory Depletion

(Automated Services > Job Management)

In the job management, there is an automated job called Inventory Depletion for Invoiced Cases. The schedule tab is where you will configure the frequency and other settings for the job to run.

By default, the job is set to run every day at 10:00 PM at the laboratories local time. The 'Start Job On' date should be set and the job will need to be marked as Active to follow this frequency.



Edit Automation Server SQL Job

Job Description:

☒ This Job is Active

SQL Script **Schedule**

Job Schedule

☐ Run only Once

☐ Run every minute(s)

☐ Run every hour(s)

☒ Run every day(s)

☐ Run every Week on

☐ Run every Month on

☐ Do not run this job on Weekends or Holidays

Start Job On:

At:

Discard Job Log after: days

OK Cancel

Please Note: This job is designed to reduce inventory for invoiced cases each day and should be scheduled to run before midnight each day. The Inventory Depletion for Invoice Cases job should not be scheduled to run during the day.