

ArbiMed User Manual

Revision 2

What Do You Want to Do?

Set Up	1
Create Orders, Scan In Items, or Scan Out Items	29
Update Product Details	97
View Reports and Data	109

Table of Contents

Set Up	1
Basics.....	1
Log In to ArbiMed	1
Dashboard	2
Set Company Information	2
Create Additional Location	5
Create Users.....	6
Create Basic User Profile	6
Define User Privileges.....	7
Create Products	8
Create a Product Using Bulk Upload	8
Add Product from ArbiMed Catalog	10
Manually Create a New Product	11
Stage 1: Set Basic Details.....	11
Stage 2: Set Advanced Details	15
Edit Manually Created Products	17
Print Barcodes for Non-Dose Items.....	18
Print One Product	18
Print Multiple Products.....	19
Create Other Elements	21
Create Custom Fields	21
Create Doctor or Staff Member	23
Create Departments	24
Create Suppliers.....	24
Create Categories.....	25
Create Patients	26
Create Patients in Bulk	26
Create Individual Patient	27
Create Orders, Scan In Items, or Scan Out Items	29
Create Orders.....	29

Create Purchase Orders	29
Create Sample Orders	33
Create Specialty Order.....	36
Create Replacement Orders	40
Order Replacement Dose	43
Approve Orders.....	46
Scan In Items.....	48
Receive Orders.....	48
Print Dose Barcodes After Receiving	50
Partially Receive Orders.....	51
Receive Initial Shipment(s)	51
Receive Final Shipment.....	52
Print Barcodes for Doses	54
Add Inventory on Stock Room.....	55
Scan Out Items	57
Reserve Items.....	57
Unreserve Items	58
Dispense Non-Dose Items	60
Undispense Non-Dose Items	61
Dispense Doses.....	62
Undispense Doses	65
Dispense to Walk-In Customers (Point of Sale Order)	66
Create Duplicate Point of Sale Order	69
Dispense or Reserve Using Bill of Materials	71
Stage 1: Create Bill of Materials	72
Stage 2: Assemble Kits.....	73
Stage 3: Scan Out Kits.....	75
Disassemble Kits.....	79
Dispense Items With Preference Cards	82
Other Functions	86
Transfer Non-Tracked Items	86

Transfer Tracked Items.....	88
Transfer Doses	90
Remove Doses.....	92
Option 1: Remove Dose Without Ordering Replacement	93
Option 2: Remove Dose and Order Replacement	94
Update Product Details.....	97
Update Multiple Products	97
Custom Bulk Update.....	97
Accept EDI Price Changes.....	98
Update PAR Levels.....	99
Update Single Product.....	100
Update Product Details: Overview	100
Update Purchase Price	101
Update Packages.....	102
Create New Shelves	105
Create New Lots	106
Update PAR Levels.....	107
View Reports and Data.....	109
Reports Overview	109
Dose-Related Reports	110
Search Dose.....	110
Doses In Shelves	111
Current Dose Inventory	112
Dose Transactions	113
Undispense Doses	113
Print Barcodes for Tracked Doses.....	114
Dose Removal Report	116
Cost, Quantity, and Profit Reports.....	117
Cost to Profit Ratio	117
Product Cost Total By Doctor.....	118
Product Cost By Supplier.....	118

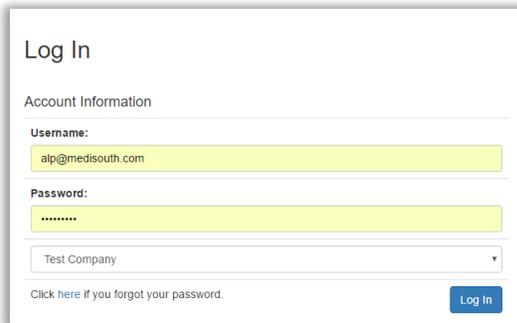
Profit By Doctor.....	119
Profit By Supplier.....	119
Quantity By Doctor.....	120
Quantity By Supplier.....	120
Other Reports.....	121
Transaction History.....	121
Search for Transactions.....	121
Undispense Non-Dose Item.....	122
Undispense Dose.....	122
Remove Dose.....	124
Inventory History.....	127
Top Consumed Items.....	128
Slow Moving Report.....	129
PAR Levels Report.....	129
Order Items.....	130
Product Dispense By Location.....	134
Patient Transactions.....	135
Gross Sales By Item.....	136
Point of Sale COGS.....	136
MTD Cumulative Sales Report.....	137
Custom Reports.....	137
Reserved Items List.....	139
Search Patient List.....	139

Set Up

Basics

Log In to ArbiMed

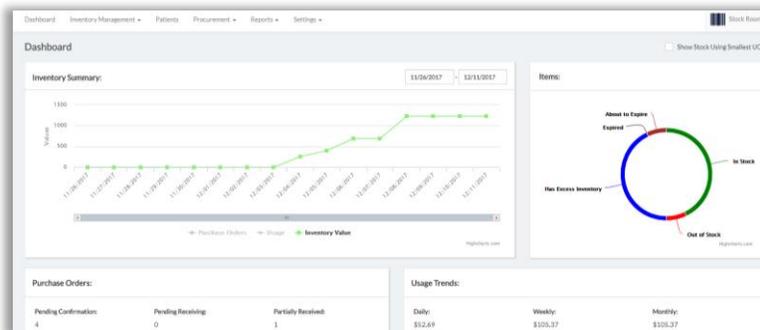
1. Go to <https://app.arbimed.com>, enter your Username and Password, and click **Log In**



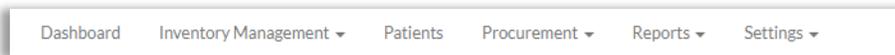
The image shows a web form titled "Log In". It includes a section for "Account Information" with fields for "Username" (containing "alp@medisouth.com"), "Password" (masked with dots), and a dropdown menu for "Test Company". There is a "Log In" button and a link for "Click here if you forgot your password."

- If you have two different accounts with the same username and password, a drop down list will appear. Select the account you wish to use.

2. Dashboard page will appear



Notice the Top Menu, which lists different modules you can access in ArbiMed



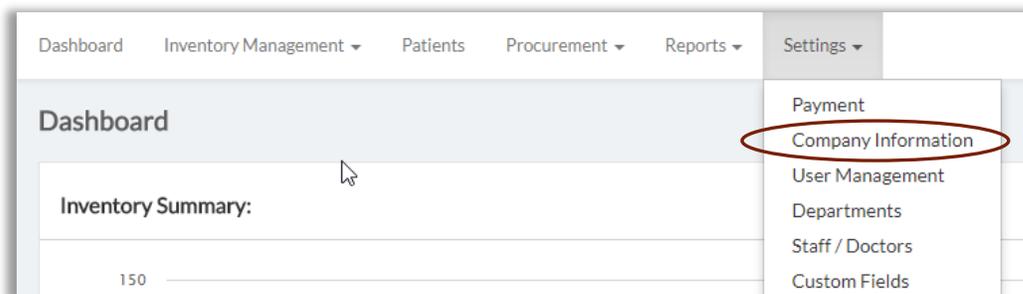
Dashboard

The ArbiMed Dashboard provides important information, including:

- Inventory Summary – Daily inventory value, purchase orders, and item usage
- Purchase Predictions – System suggests what you may need to order
 - a. Click button **Click to Review**
 - b. Select Supplier. Products will be displayed as follows:
 - White rows need to be ordered
 - Grey rows do not
 - Red rows need more information
- Purchase Orders – Shows different order categories, including those requiring your approval
- Inventory Values – Up to the minute, broken down by supplier
- Expiring Products:
 - Expiring Stock column shows:
 - Red box – Is Expired
 - Orange box – Will expire in 60 days

Set Company Information

1. Go to Top Menu and click **Settings**, then **Company Information**



Company Information screen appears

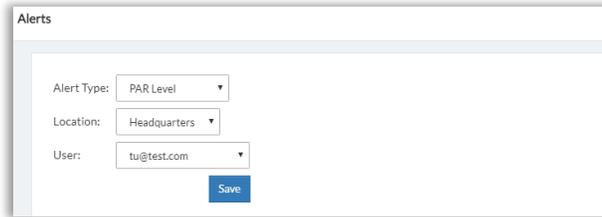
The image shows two side-by-side web forms. The left form is titled 'Company Settings' and contains various configuration options such as 'Company Name', 'Accounting Method' (with a dropdown menu), 'Default Margin Percentage', and several checkboxes for user management and inventory control. The right form is titled 'Location Address' and contains fields for 'Name', 'Contact Person', 'Address Line 1', 'Address Line 2', 'Country', 'State', 'City', 'Zip Code', 'Phone', 'Fax', 'Expiration Date', and 'URL'. Both forms have a 'Save' button at the bottom right.

2. Go to left and complete fields:

- Company Name
- Accounting Method – Select FIFO or LIFO
- Default Margin Percentage – Sets default retail price for all items (e.g. DMP of 1.15 gives a 15% profit margin)
- Inactivity Logout
- Require Customer Names For Prescribed Items – makes name required if product requires prescription
- Require Department For Scan Out
- Require Staff / Doctor Selection For Scan Outs
- Require Pricing Information for Product Update & Stock Room Operations – Recommended leave this unchecked during Setup; you can activate it later after setting all product prices
- Inactivity Timeout In Seconds
- Logout Stock Room Users when inactive
- Logout All Users when inactive
- Enable Patient Database – creates a list of patients so you can see their transaction history and easily scan items out to them
 - **After checking this box you need to logout and log back in
- Enable Track By – when you receive ordered items – allows you to serialize items received from purchase order, and to print unique barcodes for them. You will select the unit of measure to track during order receiving (see [Receive Orders](#))
- Enable Optional PO Approval Functionality – allows you to:
 - require purchase order approval from users you specify (see [Create Users](#))
 - require certain products to be approved when being ordered

Important: If a purchase order has one product requiring approval, then the entire order will require approval

3. Email & Alert Settings: Lets you specify emails to receive various system alerts
 - a. Click Email & Alert Settings
 - b. Popup appears



- c. Set Alert Type, Location, and User
 - d. Click **Save**
4. Location Address: The physical address where you will store and dispense inventory. When you first log in to ArbiMed, the default Location is "Headquarters". Complete the fields as needed, and note the following:
 - Expiration Date Cut-off Days – Number of days before expiration that alerts begin on PAR Levels Report (see [PAR Levels Report](#))
 - PAR Level - Days to Cover: Number of business days' worth of adequate stock (according to PAR Levels) that you want to maintain – Set as appropriate for your office
(For more information on PAR Levels, see [Manually Create a New Product / Stage 2: Set Advanced Details](#) / Item 2 PAR Level)
 - Send Price Change Alerts To – Email address for staffer to be informed of price changes made to products (see [Edit Manually Created Products](#))

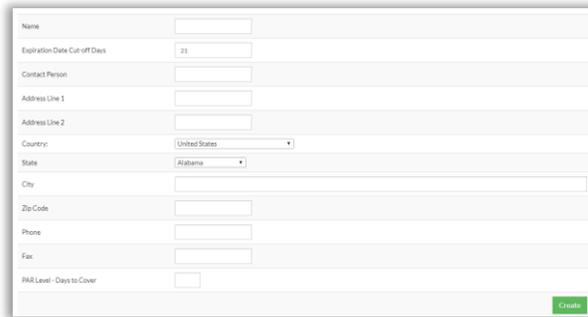
5. Click **Save Changes**

Create Additional Location

You can also create additional locations:

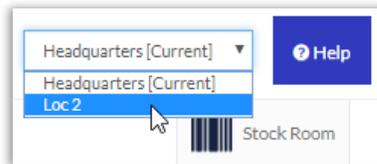
1. Go to Top Menu and click **Settings**, then **Company Information**
2. Scroll down, go to lower right and click **Create New**

Create New Location popup appears



3. Complete fields as needed, then click **Create**
4. Close popup, then go to upper right and click the Location Selection Menu (next to Help button)

Your new location is now an option:



5. Select the new location, and begin building its Inventory List (see [Create Products](#)). This will allow you to conduct transactions (Receive, Dispense, Transfer etc.) for the location.

Create Users

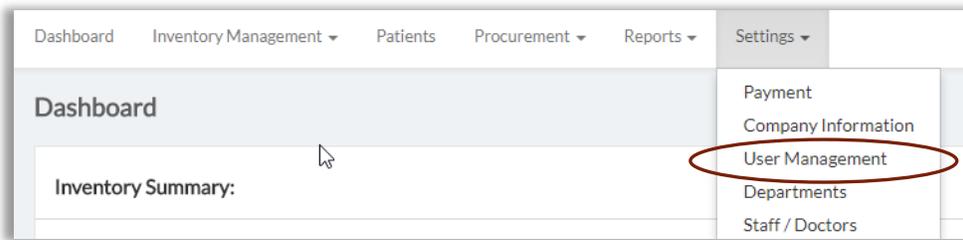
You can create system users and define their system privileges

Create Basic User Profile

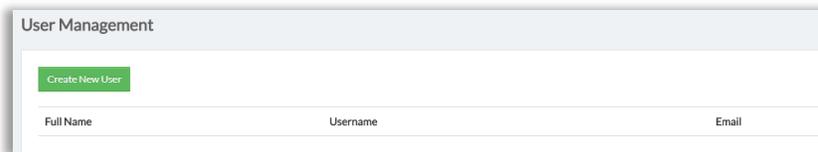
1. Go to the upper right and use the drop-down menu to select the physical address where the user will exist



2. Go to Top Menu, click **Settings**, then **User Management**

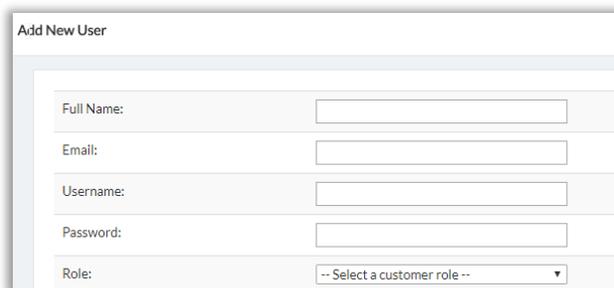


User Management page appears



3. Click **Create New User**

Add New User popup appears



4. Complete fields as desired. Note the following:

- Email – to recover a password
- Username and Password can be anything you choose
- Role – Select as appropriate:
 - User – can access all system functions, but cannot change company, product, or system settings
 - Customer Admin – can view and edit all information in the system
 - Stock Room – can only access Dashboard and Stock Room. On Stock Room can only scan items in and out

5. Click **Create**

Edit User popup appears

Full Name: Enable Advanced Roles

Username:

Email:

Password:

Role:

Location: Headquarters Loc 2

User Barcode:

Can Approve Purchase Orders:

Send Expiring Item List:

Send PAR Level Report:

Define User Privileges

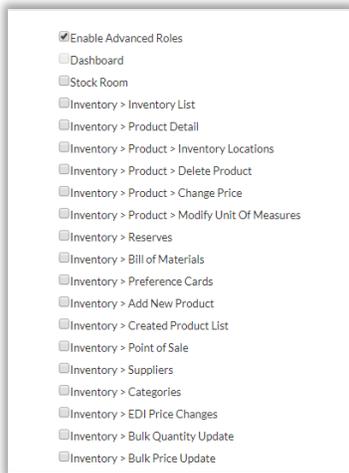
On Edit User popup (see previous) you can give additional privileges to users defined as “User” and “Stock Room”

1. If desired, change or select:

- a. Location (physical business address)
- b. Can Approve Purchase Orders
- c. Send Expiring Item List
- d. Send PAR Level Report

2. Go to upper right and check Enable Advanced Roles

System module list appears



3. Check the modules you want this user to access
4. Click **Save Changes**
System gives Success message
5. Close popup, and User Management screen will show new user



6. To modify user, click **Edit**.
To delete user, click **Delete**

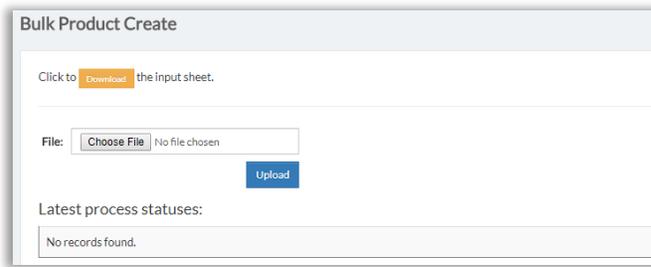
Create Products

To purchase and dispense products, you first need to create your product database, also called the Inventory List. You will do this by creating products in one of three basic ways:

- Bulk Upload
- Add from ArbiMed catalog
- Manually Create a New Product

Create a Product Using Bulk Upload

1. Go to Top Menu, click **Inventory Management**, then **Bulk Product Creation**
Bulk Product Create screen appears



2. Click **Download** to obtain the ArbiMed standardized Input Sheet

3. Go to your computer and open the Input Sheet

Note explanatory row:

Add To Other Locations	Supplier Name	Category	Description
Y or N. Required	Supplier name or empty	Category or empty	Product description.

4. Complete Input Sheet:

Important: Do not change sheet format

- a. Populate fields (required fields marked in red)
- b. Provide UPC code. If not, system will create one at upload
- c. Indicate desired Unit of Measure and pricing

For example, to create a Case of 10 Boxes, where each Box costs \$14 and contains two actual units of the product (called "Each"), you would complete the sheet as follows:

Unit Of Measure	Is Purchasing Package	Package Price	Sub Unit Of Measure	Sub Unit Of Measure Quantity
Case	N		Box	10
Box	Y	14	Each	2
Each	N			

- Box is purchasing package, so Is Purchasing Package is "Y" and Package Price is "14"
- Box has "Each" as Sub Unit of Measure, and Sub Unit of Measure Quantity is "2"
- "Each" is the smallest possible package, so it has no Sub Unit of Measure or Quantity

5. Upload Input Sheet:

a. Click **Choose File**

Pop-up will appear displaying files on your computer

b. Locate the input sheet, highlight it with your mouse, then press Enter on your keyboard

File name will appear in File Upload box.

c. Click **Upload**

System may require up to 15 minutes to process

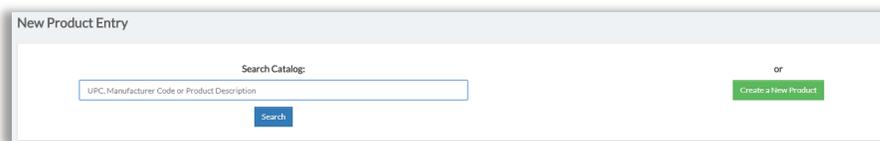
- o Product(s) can now be viewed in Inventory List, with zero units. To add units, it is recommended you create purchase orders and then scan them in from the orders (see [Create Orders](#) and [Receive Orders](#))
- o To access Inventory List, go to Top Menu, click **Inventory Management**, then select **Inventory List**

Add Product from ArbiMed Catalog

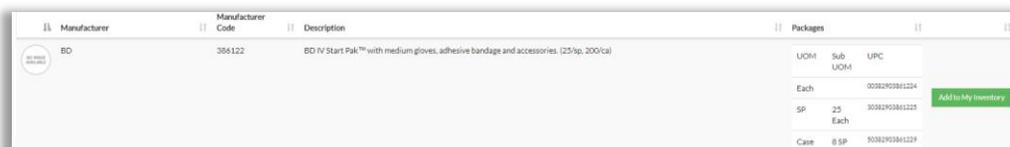
You can search the ArbiMed catalog to add products with preset details

Important: Some details for products added this way cannot be changed later
For this reason it is recommended you [Manually Create a New Product](#)

1. Go to Top Menu, click **Inventory Management**, then **Create New Product**
New Product Entry screen appears



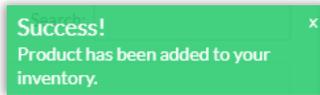
2. Click in Search Catalog box and provide UPC, Manufacturer Code, or Product Description; then click **Search**
System displays matching item(s)



Manufacturer	Manufacturer Code	Description	Packages
BD	386122	BD IV Start Pak™ with medium gloves, adhesive bandage and accessories, (25/tp, 200/Cal)	UOM: Sub UOM Each 00382903861224 SP 25 30382903861225 Case 8 SP 30382903861224

3. Click **Add to My Inventory**

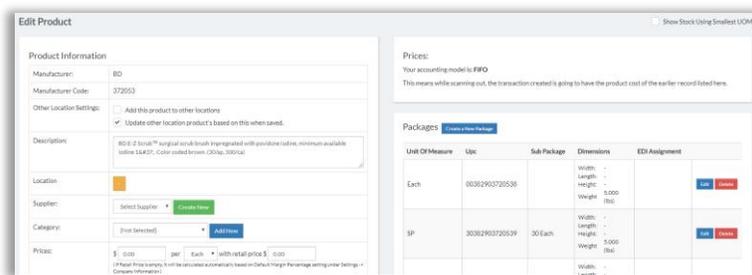
System gives Success message



4. Go to Top Menu, click **Inventory Management**, then **Inventory List**

5. Locate the product, and click 

Edit Product screen appears



6. Set fields as needed. (Please see below: [Manually Create a New Product/ Stage 2: Set Advanced Details](#))

Important: Prices will be 0 by default. Set as desired

Manually Create a New Product

This process has two stages:

Stage 1: Set Basic Details

Stage 2: Set Advanced Details

Stage 1: Set Basic Details

1. Go to Top Menu, click **Inventory Management**, then **Create New Product**

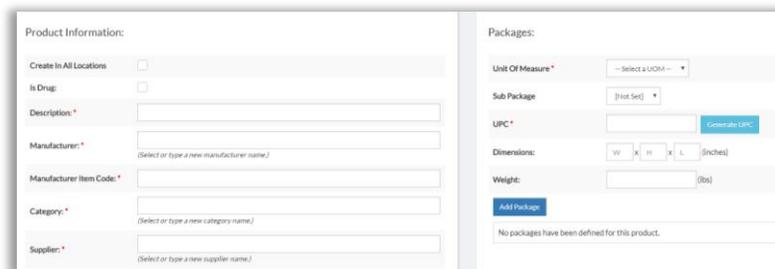
New Product Entry screen appears



The screenshot shows the 'New Product Entry' search interface. It features a search bar with the placeholder text 'UPC, Manufacturer Code or Product Description' and a blue 'Search' button. To the right of the search bar, there is an 'or' label and a green 'Create a New Product' button.

2. Click **Create a New Product**

First Screen appears



The screenshot displays the 'Product Information' and 'Packages' sections of the form. The 'Product Information' section includes fields for 'Create in All Locations', 'Is Drug', 'Description*', 'Manufacturer*', 'Manufacturer Item Code*', 'Category*', and 'Supplier*'. The 'Packages' section includes 'Unit Of Measure*', 'Sub Package', 'UPC*', 'Dimensions' (W, H, L in inches), and 'Weight'. A blue 'Add Package' button is visible, and a message states 'No packages have been defined for this product.'

3. Go to the left and complete fields. Required fields have a red asterisk (*)

4. Rename Shelf Location

- Shelves and lots are used to store inventory. Shelves are the parent storage element and can have Lots as a subcategory
- When you create a product, system dispenses a default shelf name of “-,” but it is recommended you rename it to something more useful
- Note: Elsewhere, the term “Location” refers to the physical business address where you are receiving and dispensing inventory (see [Set Company Information](#))

5. Define packages

- a. First, define the smallest package
 - i. Unit of Measure – Select as desired (for example, “Each”)
 - ii. UPC – Scan / type in, or click **Generate Barcode**
 - iii. Dimensions and Weight (Optional)
 - iv. Click **Add Package**

System shows new package

Unit Of Measure	Sub Package	UPC	Dimensions	Weight	
Each	-	MS4458C6BMS		---	Delete

b. Then, define the next largest package

For example, if the smallest package is Each, the next level could be Box, which would contain the "Eaches"

- i. Unit of Measure – Select as desired
- ii. Select Sub Package (recommended)

Unit Of Measure *	Box
Sub Package	[Not Set]
UPC *	Each

iii. If you set Sub Package, also set Sub Package Count (required)

Unit Of Measure *	Box
Sub Package	Each
Sub Package Count *	20

- iv. UPC – Scan / type in, or click **Generate Barcode**
 - v. Dimensions and Weight (Optional)
 - vi. Click **Add Package**
- System shows new package

Unit Of Measure	Sub Package	UPC	Dimensions	Weight	
Each	-	MS4458C6BMS		---	Delete
Box	20 Each	MS7F97C2CMS		---	Delete

c. Finally, if desired, you can create another level of package (for example, “Case”) to make a common package hierarchy of Each-Box-Case, as so:

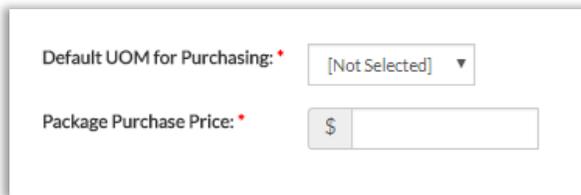
Unit Of Measure	Sub Package	UPC
Each	-	MS4458C6BMS
Box	20 Each	MS7F97C2CMS
Case	16 Box	MS005EA67MS

d. If you wish to delete a package, click **Delete**. Note that:

- If you delete a package that is a sub unit of a greater package, you will delete that greater package as well
- If you delete the smallest package in a hierarchy, you will delete the entire hierarchy as well. For instance, in the graphic above, if you delete Each, you will delete Box and Case as well.

6. Set pricing for the main purchasing package

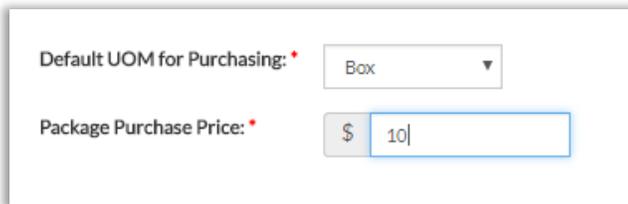
a. Go to lower right to pricing fields:



Default UOM for Purchasing: * [Not Selected] ▼

Package Purchase Price: * \$

b. Set Default UOM for Purchasing and Package Purchase Price

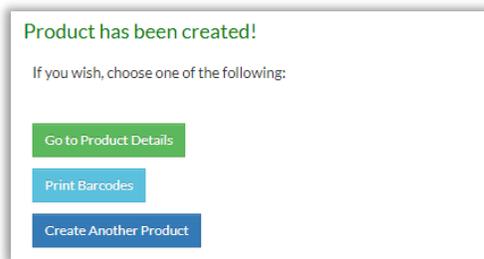


Default UOM for Purchasing: * Box ▼

Package Purchase Price: * \$ 10|

7. Click **Create Product**

System gives Success message



8. Click **Go to Product Details**

Edit Product Screen appears

Product Information

Manufacturer: A AND D HEALTHCARE
 Manufacturer Code: 123123
 Add this product to other locations
 Update other location product's based on this when saved
 Description: Bandage 3
 Location: [Orange Box]
 Supplier: McKesson
 Category: Home Health/Extended Care
 Price: \$ 10.00 per Box with retail price \$ 11.50
 Current Inventory: 10 Each
 Expiration Date Required: []

Prices:
 Your accounting model is FIFO
 This means while scanning out, the transaction created is going to have the product cost of the earlier record listed here.

Inventory Count	Unit Price	Price For The Current UOM	Total Value	Create Date
0 Each	\$0.500000	10.00	\$0.00	12/08/2017 6:56:24 PM

Packages:

Unit Of Measure	Upc	Sub Package	Dimensions	EDI Assignment
Each	MS4458C68MS		Width: - Length: - Height: - Weight: -	[Edit] [Delete]
Box	MS797C2CMS	20 Each	Width: - Length: - Height: - Weight: -	[Edit] [Delete]
Case	MS005A47MS	10 Box	Width: - Length: - Height: - Weight: -	[Edit] [Delete]

Stage 2: Set Advanced Details

1. Complete fields. Note in particular:

- Other Location Settings – Refers to physical addresses where you will store and manage inventory. Check the boxes (recommended):
 - Add this product to other locations
 - If other locations are to store this product, the product name must be associated with (“added to”) those locations
 - Checking this box will “add” the product name to those locations
 - Product will have no units, until units are transferred in (see [Other Functions](#)) or received from orders (see [Receive Orders](#))
 - Update other location product's based on this when saved – propagates any changes made on this page to this product's record at the other addresses
- Location – Refers to shelves and lots. Click orange box, then create new shelves/lots as desired
- Retail Price – Confirm this is correct

- Is Dose – Check box if your system build supports Dose Tracking, and you want to activate it for this product
Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking
- Product Prefix – Required if you checked Is Dose. Used to create dose numbers
- Approved ICD Codes for Billing – Required if you checked Is Dose. Provide as needed. Use base codes with no modifiers. Or type All
- Usage Warning Days (recommended) – Gives alert if you try to assign item twice to patient within this period
- Requires PO Approval – Check this to require Purchase Order approval when item is on the order

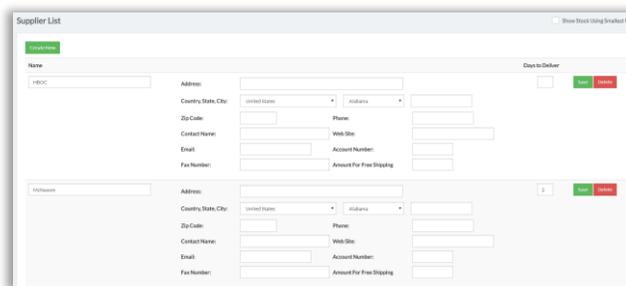
Important: Even if you check this box, Sample / Specialty / Replacement orders with this item will not require approval, because those order types do not have prices (see [Create Orders](#))

- Required For Scan Out – Checked fields will be required to be populated on Stock Room when scanning out this product

2. PAR Level – These settings help the system track product usage and generate purchase reminders (see [Dashboard Overview](#))

- Exclude from PAR Level – product won't be managed by PAR Levels
- Minimum Stock Level – if greater than estimated future usage, will be [PAR Levels Report](#) ("PLR") Suggested Purchase Quantity
- Maximum Stock Level – if less than estimated future usage, will be PLR Suggested Purchase Quantity
- Minimum Purchase Quantity – ensures PLR purchase suggestions are correct
- Number of Days for Receiving – default is 0. To change, click the link **Click here to change**

a. New browser tab appears



b. Locate supplier, then set Days to Order to desired number

c. Click **Save** for that supplier, then close the tab

d. Screen refreshes and shows new Number of Days for Receiving

3. When finished, click **Update Product**

Product can now be viewed in Inventory List, with zero units

To add units, it is recommend you Receive them from a Purchase Order (see [Receive Orders](#))

4. At this point you can also print product barcodes (see below: [Print Barcodes for Non-Dose Items](#))

Edit Manually Created Products

If you wish can edit your manually created products

Two simple ways are from the Inventory List, or from the Created Products List (for other methods, see [Update Product Details](#))

From Inventory List:

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Find your product and click 
3. Edit product as needed, then click **Update Product**

From Created Products List:

1. Go to Top Menu, click **Inventory Management**, then **Created Products**
2. Find product and click **Edit**
3. Edit product as needed, then click **Update Product**

Print Barcodes for Non-Dose Items

If you wish you can print product barcodes

There are two main methods: One product at a time, or multiple products at once

Note: This process is for Non-Dose Items. To print barcodes for Doses, see [Print Barcodes for Doses](#)

Print One Product

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**

Inventory List screen appears

		Mf. Code	Manufacturer	Cost	Cost UOM	Description
<input type="checkbox"/>	  	1621	3M	\$0.00	Box	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE
<input type="checkbox"/>	  	76ss	A AND G PHARMACEUTICALS	\$3.00	Dose	Drug456
<input type="checkbox"/>	  	24sk	AB7 INDUSTRIES	\$2.00	Each	XT Bandages



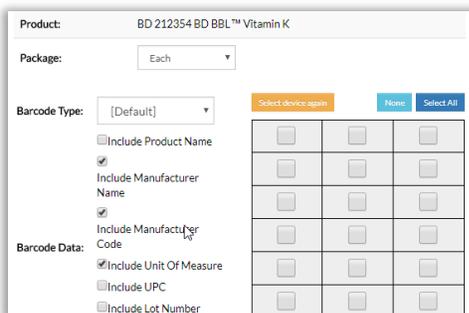
2. Find product, then click

Print Barcode popup appears



3. Set Package, and click **Standard Printer (Pdf)**

Barcode formatting popup appears



- On the right is the print grid. Click each space you want filled
For instance, if you click:



The print sheet will look like:



- Set the other fields as you wish
- Scroll down and click **Print**
System will download barcode sheet to your computer
- Print sheet

Print Multiple Products

- Go to Top Menu, click **Inventory Management**, then **Inventory List**
Inventory List appears

	Mf. Code	Manufacturer	Cost	Cost UOM	Description
<input type="checkbox"/>	1621	3M	\$0.00	Box	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE
<input type="checkbox"/>	7685	A AND G PHARMACEUTICALS	\$3.00	Dose	Drug456
<input type="checkbox"/>	12345	A G MARIN PHARMACEUTICAL	\$2.00	Box	Lot Test Bandages

2. Check the boxes for the products to print

<input checked="" type="checkbox"/>	  	212354	BD	\$10.00	Each	BD BBL™ Vitamin K
<input checked="" type="checkbox"/>	  	PZN2297381	COVIDIEN	\$25.00	Box	TELFA ADHESIVE ISLAND DRESSING

3. Go up and click **Print Barcode for Selected**

Select packages popup appears

Mf. Code	Description	Packages (Select All)
212354	BD BBL™ Vitamin K	<input type="checkbox"/> Each <input type="checkbox"/> SP
PZN2297381	TELFA ADHESIVE ISLAND DRESSING	<input type="checkbox"/> Box <input type="checkbox"/> Case <input type="checkbox"/> Each

4. Check the packages you want to print

Description	Packages (Select All)
BD BBL™ Vitamin K	<input checked="" type="checkbox"/> Each <input type="checkbox"/> SP
TELFA ADHESIVE ISLAND DRESSING	<input checked="" type="checkbox"/> Box <input checked="" type="checkbox"/> Case <input type="checkbox"/> Each

System will produce one barcode for each selected product-package combination

In this example:

Vitamin K	Each
Telfa Dressing	Box
Telfa Dressing	Case

5. Click **Next**

Barcode sheet will open in new browser tab



6. Print sheet

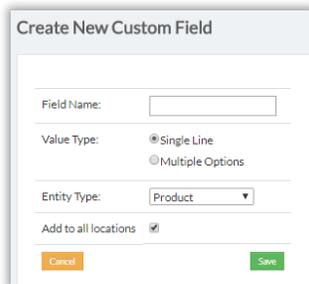
Create Other Elements

Create Custom Fields

You can add custom fields for products and use them for reporting and searching

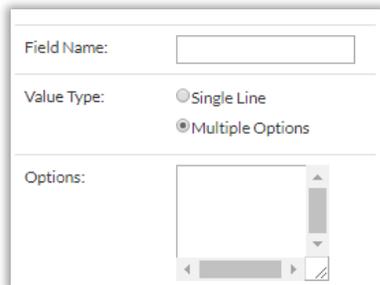
1. Go to Top Menu, click **Settings**, and select **Custom Fields**
2. Click **Add New**

Create New Custom Field screen appears



3. If you want field to have multiple options to choose from, set Value Type to "Multiple Options"

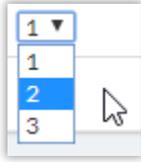
Screen refreshes and show:



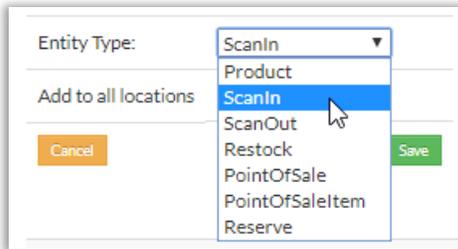
- a. Click in box with scroll arrows and type field options, each one on a new line.
For example:



After the field is created, the system will display these options as a drop down menu:

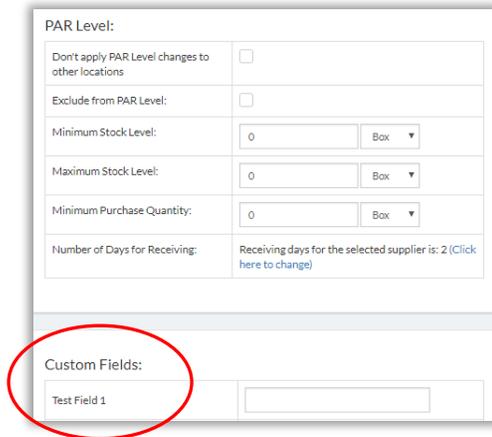


4. Set Entity Type to determine which system screens display the field



For example:

- If you set Entity Type to “Product,” the field will appear on the Edit Product screen, at the bottom left:



- If you set Entity Type to “Scan In,” the field will appear on the Stock Room page on the right, when you scan an item to Add:

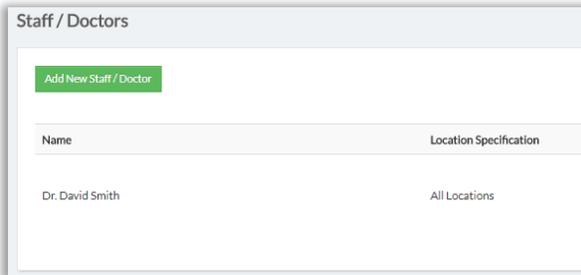


5. Click **Save**

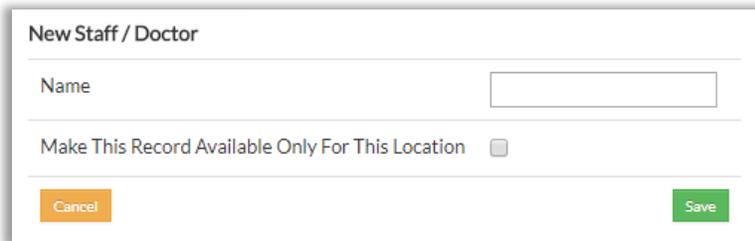
Create Doctor or Staff Member

Doctors or Staff can be created and then linked to various functions, such as item dispensing (see [Scan Out Items](#))

1. Go to Top Menu, click **Settings**, then **Staff/Doctors**
Staff/Doctors screen appears

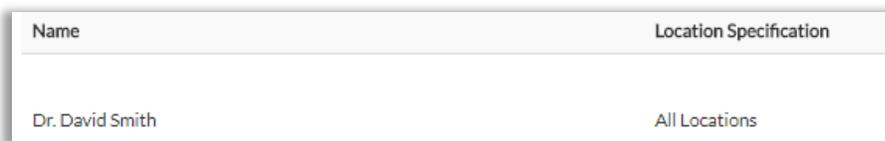


2. Click **Add New Staff/Doctor**
New Staff/Doctor fields appear



The screenshot shows a form titled "New Staff / Doctor". It has a "Name" label followed by an empty text input field. Below that is a checkbox labeled "Make This Record Available Only For This Location" which is currently unchecked. At the bottom left is an orange "Cancel" button and at the bottom right is a green "Save" button.

3. Provide Name
 - If desired check Make This Record Available Only For This Location
4. Click **Save**
System shows new staff/doctor



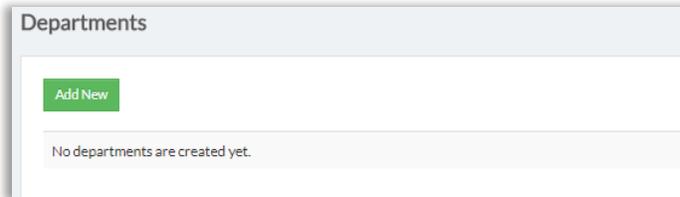
The screenshot shows the "Staff / Doctors" screen after saving. The table now has two rows. The first row is "Dr. David Smith" under "Name" and "All Locations" under "Location Specification". The second row is empty.

5. To edit staff/doctor, click **Edit**,
To delete staff/doctor, click **Delete From This Location**, or **Delete From All Locations**

Create Departments

Create a department to use in scanning items and reporting

1. Go to Top Menu, click **Settings**, then select **Department**
Departments screen appears



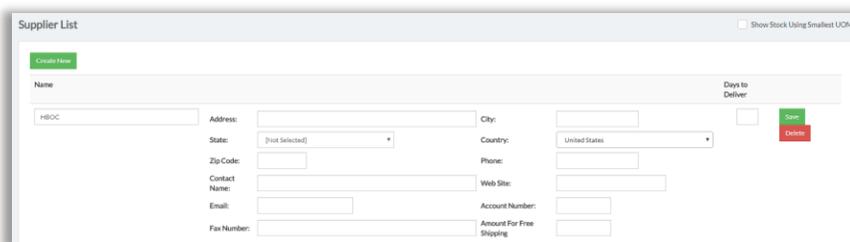
2. Click **Add New**, complete fields, then click **Save**
Department screen appears and shows new department

Department Name	Location
Dept 2	Headquarters

3. To edit department, click **Edit**
To delete department, click **Delete**

Create Suppliers

1. Go to Top Menu, click **Inventory Management**, then **Suppliers**
Supplier List screen appears

A screenshot of a "Supplier List" form. The form has a header with a "Create New" button and a checkbox for "Show Stock Using Smallest UCM". Below the header, there are several input fields: "Name" (with "HBOC" entered), "Address", "City", "State" (a dropdown menu showing "[Not Selected]"), "Country" (a dropdown menu showing "United States"), "Phone", "Web Site", "Email", "Account Number", "Fax Number", and "Amount For Free Shipping". There are also "Save" and "Cancel" buttons on the right side of the form.

2. Click **Create New**

Popup appears



A form for entering supplier information. The fields are: Supplier Name, Address, Country (dropdown menu showing 'United States'), State (dropdown menu showing 'Alabama'), City, Zip Code, Phone, Contact Name, Web Site, Email, Account Number, Fax Number, Amount For Free Shipping, and Days to Deliver (checkbox). There are 'Save' and 'Cancel' buttons at the bottom right.

3. Type Supplier Name
4. Input other fields as desired
5. Click **Save**

Create Categories

1. Go to Top Menu, click **Inventory Management**, then **Categories**
Categories screen appears



A screen titled 'Categories'. It features a text input field with an 'Add' button next to it. Below the input field is a table with the following content:

Category Name
Drugs
GLUCOSE TEST STRIPS

2. Click in text box and enter desired category name, then click **Add**
Screen refreshes and shows new category

Create Patients

If you want to track patient item usage and other information, you will need to create those patients here.

In addition, if your system build supports dose tracking, and you want to use Specialty Orders to order doses for certain patients, then to dispense those doses you will need to create the patients here and assign those drugs to them.

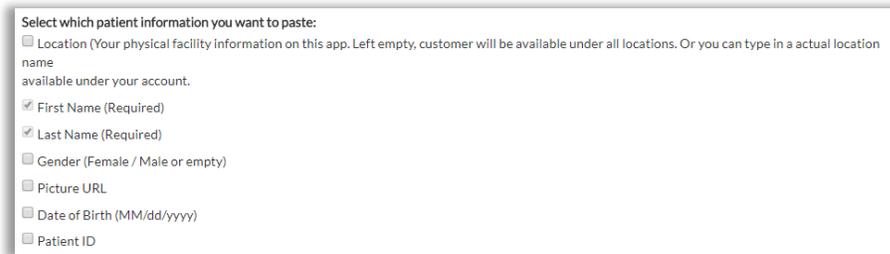
Only dosed drugs can be assigned; non-dose items cannot be assigned

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Create Patients in Bulk

1. Go to Top Menu and click **Patients**
2. Click **Create Patients in Bulk**

Popup appears

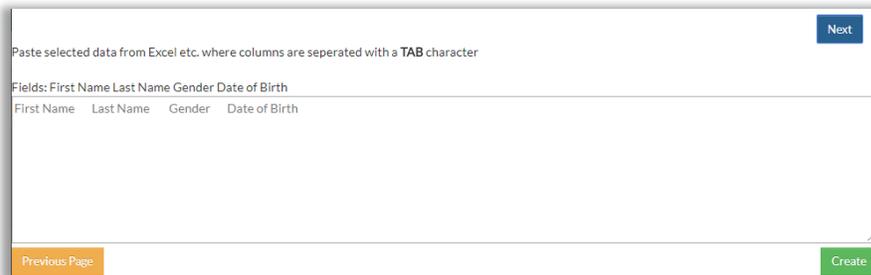


Select which patient information you want to paste:

- Location (Your physical facility information on this app. Left empty, customer will be available under all locations. Or you can type in a actual location name available under your account.)
- First Name (Required)
- Last Name (Required)
- Gender (Female / Male or empty)
- Picture URL
- Date of Birth (MM/dd/yyyy)
- Patient ID

3. Check desired fields, then click **Next**

Input box appears



Paste selected data from Excel etc. where columns are seperated with a **TAB** character

Fields: First Name Last Name Gender Date of Birth

First Name	Last Name	Gender	Date of Birth
------------	-----------	--------	---------------

Previous Page Create

- a. Copy data from Excel and paste into a text (.txt) file
- b. Then copy contents of text file and paste into box here

Data will be automatically tab-delimited

4. Click **Create**

System gives Success message, and popup closes

5. To view patient, populate Search field and click Search

Create Individual Patient

1. Go to Top Menu and click **Patients**

2. Click **+New Patient**

Popup appears

Location: [All Locations] ▾

Assigned Products

+Add Multiple Products

Manufacturer Manufacturer Code

Save

3. Complete left-hand fields as needed, then click **Save**

4. Go to right and click **+Add Multiple Products**

Popup appears

Inventory List

Supplier: [Not Selected] ▾ Inventory Location: [All] ▾ New Stock Exp. Date Required +Add Multiple Products

Clear Search

Quick Filter: _____

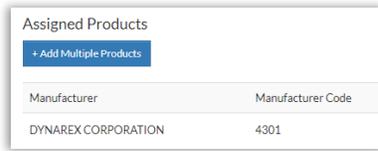
MI Code	Manufacturer	Cost	Cost UOM	Description	Supplier	In Stock	Total Value
1421	3M	\$5.00	Box	TEGADEX™ TRANSPARENT DRESSING FIRST AID 37X42	Mickelson	0	\$0.00
123123	A AND O HEALTHCARE	\$7.00	Box	Bandage-3	Mickelson	3 Box	\$21.00
8432	A AND O MELLAND WELDING SUPPLY CO	\$1.00	Dose	Jan Test 3 product	Mickelson	1 Dose	\$1.00
786	A AND O PHARMACEUTICALS	\$3.00	Dose	Drug456	Mickelson	1 Bottle	\$150.00
12345	A G MARRIN PHARMACEUTICAL	\$1.00	Box	Lot Test Bandages	Mickelson	1 Box	\$1.00
246	ABT INDUSTRIES	\$2.00	Each	KT Bandages	Mickelson	1 Box, 45 Each	\$58.00
3567	AB2 INDUSTRIES	\$1.00	Each	Ulcerin-20	Mickelson	0	\$0.00

USE LEFT-CLICK TO ITEMS

5. Use search fields or scroll down to find desired product(s)

6. Click check box for the product(s), then click **Use Selected Items**

System shows product(s) as added

A dialog box titled "Assigned Products" with a blue button labeled "+ Add Multiple Products". Below the button is a table with two columns: "Manufacturer" and "Manufacturer Code". The table contains one row with the values "DYNAREX CORPORATION" and "4301".

Manufacturer	Manufacturer Code
DYNAREX CORPORATION	4301

7. Click **Save**

Create Orders, Scan In Items, or Scan Out Items

Create Orders

ArbiMed allows you to create four types of product Orders:

- Purchase Orders – may require approval
- Sample Orders – for free samples
- Specialty Orders – for items that seller will bill to patient insurance
- Replacement Orders – for free items to replace current ones

Important:

- Only Purchase Orders have prices and will require approval if they include products that require approval (see [Manually Create a New Product](#) / Stage 2: Set Advanced Details / Requires PO Approval)
- In contrast, Sample, Specialty and Replacement orders are free and never require approval, even if they include such products

Create Purchase Orders

Set Up Order

1. Go to Top Menu and click **Procurement**, then **Purchase Orders**
Purchase Order screen appears

Purchase Orders Show Stock Using Smallest UOM

Create New Order Create New Blanket Order

PO Number: ME Code:

From Date: To Date:

Supplier: [All] Status: [All Pending]

Clear Search

Legend:
Pending
Awaiting Approval
Placed
Partially Received
Completed

2. Click **Create New Order**

Add New Purchase Order screen appears

Supplier: --

PO Number: 010318-004

Type: Purchase Order
Regular Purchase Order that enables you to add & receive items and gets closed whenever all items have been received.

Requires Approval From: PO Approve User Group (1)

Patient:

Create Purchase Order

3. Complete fields:

- Supplier – required
- PO Number – system-generated, but you can change it
- Type – Leave as “Purchase Order”
- Requires Approval From – provide name of Approver (see [Create Users](#))

4. Click **Create Purchase Order**

Edit Purchase Order screen appears

Location: Headquarters

Type: Purchase Order

Supplier: McKesson PO Number: 010318-004 Order Status: Creating

Notes

Save Order

Invoice Number: Invoice Number

Confirmation Number: Confirmation Number

Place Order With Confirmation Code Manually

Quick Add Via Item Lookup (IPC) Quick Lookup Add New Product Add Replacement Dose

5. Go to lower right and click **Add New Product**

Popup appears

Search: UPC: Supplier: McKesson

Create New Product Search Cancel

Inventory Products

	MI Code	Manufacturer	Description	In Stock	Supplier	Location
Add to Order	76ss	A AND G...	Drug456	2 Dose	McKesson	Headquarters
Add to Order	RP 100?	Douglas...	Melatonin 1 mg	10 Dose	McKesson	Headquarters

6. Click in Search box, type product name, and press Enter;
Or, click in UPC box and scan UPC

System shows search result

	Mf. Code	Manufacturer	Description	In Stock
Add to Order	PZN2297381	COVIDIEN	TELFA ADHESIVE ISLAND DRESSING	2 Case, 7 Box, 24 Each

7. Click **Add to Order**

System shows product details

NO IMAGE AVAILABLE	Mf. Code:	PZN2297381	Manufacturer:	COVIDIEN
	Product Name:	TELFA ADHESIVE ISLAND DRESSING		
	Specs:		Price:	\$25.00 per Box 25 Each / 8 Box / Case
	Supplier:	McKesson	In Stock:	2 Case, 7 Box, 24 Each
Location:	Cabinet 2			
Quantity:	<input type="text"/>	ETA:	<input type="text"/>	
Price (per Package): \$	<input type="text" value="0"/>	Package:	<input type="text" value="Box"/>	

8. Enter Quantity (required) and set other fields as desired, then click **Add to Order**

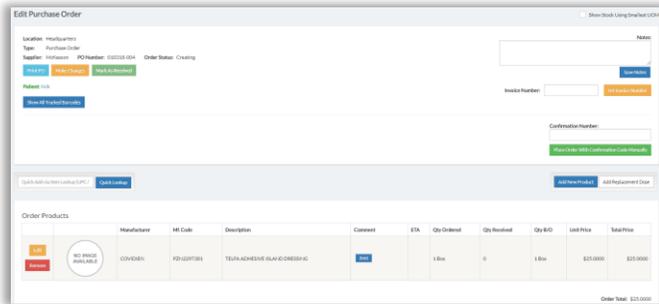
Changing Prices:

If you change Price (per Package) and click **Add to Order**, system will ask if you are sure

- If you click **Ok**, this will be the new price for the item for all transactions going forward
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears



Screen shows your product at the bottom

Order Products	Manufacturer	ME Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/O
	COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING			1 Box	0	1 Box

2. If you wish:

- Click **Edit** to set product ETA, or to change quantity, package or price
- Click **Remove** to remove a product
- Add other products, or search other suppliers
- Type Notes (optional) and click **Save Notes**
- Type Invoice Number (suggested) and click **Set Invoice Number**

3. Next:

If order does not require approval:

- a. Provide Confirmation Number (suggested)
- b. Click button **Place Order With Confirmation Code Manually**, then **Ok**
- c. Screen refreshes, and button you clicked is now faded
**This confirms order has been created
- d. If you wish:
 - Click **Send Fax** to fax a copy of the order
 - Click **Print PO** to print the order, which you can use for Receiving (see [Receive Orders](#))

e. If you go to Purchase Orders screen, you will see order listed

010318-004	Purchase Order	McKesson	Headquarters	Order_Placed	1 Box of PZN2297381
------------	----------------	----------	--------------	--------------	---------------------

Or, if order requires approval:

- Provide Confirmation Number (suggested)
- Click the button **Send PO to [x] for approval**, where [x] is the approving person or group you chose when you set up this order (see [Set Up Order](#))
- Screen refreshes, and button will be replaced by message:
“Awaiting approval from [x]”
- Order will not be created until approval received (see [Approve Orders](#))
- If you go to Purchase Orders screen, you will see this order in red:

Type	Supplier	Location	Status	Items	Create Date	Received Date
010318-006	Purchase Order	McKesson	Headquarters	AwaitingApproval	1 Dose of RP 100	2018-01-03

Status is “Awaiting Approval”

Create Sample Orders

You can use a Sample Order to order free samples

Set Up Order

- Go to Top Menu and click **Procurement**, then **Purchase Orders**
Purchase Order screen appears

The screenshot shows the 'Purchase Orders' screen with a search filter area. It includes buttons for 'Create New Order' and 'Create New Blanket Order'. There are input fields for 'PO Number', 'MI Code', 'From Date', and 'To Date'. There are also dropdown menus for 'Supplier' (set to '[All]') and 'Status' (set to '[All Pending]'). There are 'Clear' and 'Search' buttons. On the right side, there is a legend with colored squares corresponding to order statuses: Pending (grey), Awaiting Approval (red), Placed (blue), Partially Received (yellow), and Completed (green). A checkbox for 'Show Stock Using Smallest UOM' is also visible in the top right corner.

- Click **Create New Order**

Add New Purchase Order screen appears

Add New Purchase Order

Supplier: --

PO Number: 010318-001

Type: Purchase Order
Regular Purchase Order that enables you to add & receive items and gets closed whenever all items have been received.

Requires Approval From: PO Approve User Group [1]

Patient:

Create Purchase Order

3. Complete fields

- Supplier – required
- PO Number – system-generated, but you can change it
- Type – Set as “Sample Order”
- Patient (optional)

4. Click **Create Purchase Order**

Edit Purchase Order screen appears

Edit Purchase Order

Location: Headquarters

Type: Sample Order

Supplier: McKesson PO Number: 010318-001 Order Status: Creating

View Order Order Changes Mark As Received View Notes

Patient: null

Invoice Number: Confirmation Number:

Play Order With Confirmation Code Manually

Quick Add via Item Lookup (UPC) Quick Lookup Add New Product Add Replacement Close

5. Go to lower right and click **Add New Product**

Popup appears

Search: UPC: Supplier: McKesson

Create New Product Search Cancel

Inventory Products

ME Code	Manufacturer	Description	In Stock	Supplier	Location
76ss	A AND G...	Drug456	2 Dose	McKesson	Headquarters
RP 100?	Douglas...	Melatonin 1 mg	10 Dose	McKesson	Headquarters

Add to Order Add to Order

6. Click in Search box, type product name, and press Enter;
Or, click in UPC box and scan UPC

System shows search result

	Mf. Code	Manufacturer	Description	In Stock	Supplier
Add to Order	RP 100	Douglas...	Melatonin 1 mg	16 Dose	McKesson

7. Click **Add to Order**

System shows product details

NO IMAGE AVAILABLE

Mf. Code: RP 100 Manufacturer: Douglas Laboratories
Product Name: Melatonin 1 mg
Specs:
Supplier: McKesson Price: \$3.00 per Dose Dose
Location: In Stock: 16 Dose

Quantity: ETA:
Price (per Package): \$ Package:

[Add to Order](#)

8. Enter Quantity (required) and set other fields as desired, then click **Add to Order**

Changing Prices:

If you change Price (per Package) and click **Add to Order**, system will ask if you are sure

- If you click **Ok**, this will be the new price for the item for all transactions going forward
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears

Confirmation Number:

[View Order with Confirmation Code History](#)

Order Products

	Manufacturer	Mf. Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/D	Unit Price	Total Price
	Douglas Laboratories	RP 100	Melatonin 1 mg	Add	1 Dose	0	1 Dose		\$0.000	\$0.000

Order Total: \$0.000

Product you chose is at bottom:

Order Products											
		Manufacturer	MI Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/O	Unit Price	Total Price
Edit	Remove		Douglas Laboratories	RP 100	Melatonin 1 mg	Bill	1 Dose	0	1 Dose	\$0.0000	\$0.0000

Order Total is \$0, since this is not a Purchase Order

2. If you wish:

- Click **Edit** to set product ETA, or to change quantity, package or price
- Click **Remove** to remove a product
- Add other products, or search other suppliers
- Type Notes (optional) and click **Save Notes**
- Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**

Screen refreshes, and button is now faded

This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see [Receive Orders](#))

Create Specialty Order

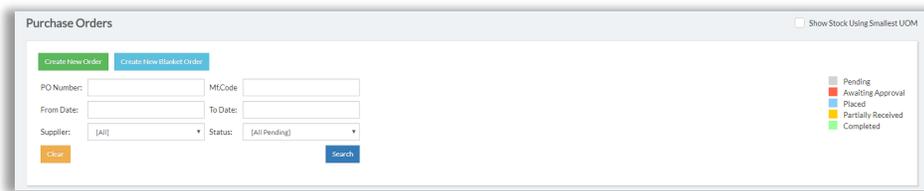
You can create an order for special items as needed for a particular patient

These items are billed to patient insurance, and so will not incur charges

Set Up Orders

1. Go to Top Menu and click **Procurement**, then **Purchase Orders**

Purchase Order screen appears

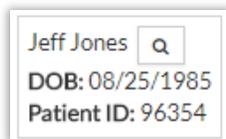


2. Click **Create New Order**

Add New Purchase Order screen appears

3. Complete fields

- Supplier – required
- PO Number – system-generated, but you can change it
- Type – Set to “Specialty Order”
- Patient – **Required**
 - a. Provide name or ID number of Patient to receive this item
 - b. System provides name box



- c. Click name box to select patient

4. Click **Create Purchase Order**

Edit Purchase Order screen appears

a. Go to Notes field and type as needed

b. Click **Save Notes**

5. Go to lower right and click **Add New Product**

Popup appears

Search: UPC: Supplier: McKesson Search Cancel

Create New Product

Inventory Products

	Mf. Code	Manufacturer	Description	In Stock	Supplier	Location
Add to Order	76ss	A AND G...	Drug456	2 Dose	McKesson	Headquarters
Add to Order	RP 100?	Douglas...	Melatonin 1 mg	10 Dose	McKesson	Headquarters

6. Click in Search box, type product name, and press Enter;

Or, click in UPC box and scan UPC

System shows search result

	Mf. Code	Manufacturer	Description	In Stock	Supplier
Add to Order	RP 100	Douglas...	Melatonin 1 mg	16 Dose	McKesson

7. Confirm, then click **Add to Order**

System shows product details

NO IMAGE AVAILABLE

Mf. Code: RP 100 Manufacturer: Douglas Laboratories

Product Name: Melatonin 1 mg

Specs:

Supplier: McKesson Price: \$3.00 per Dose Dose

Location: In Stock: 16 Dose

Quantity: ETA:

Price (per Package): \$ Package: Dose ▼

Add to Order

8. Enter Quantity (required) and set other fields as desired, then click **Add to Order**

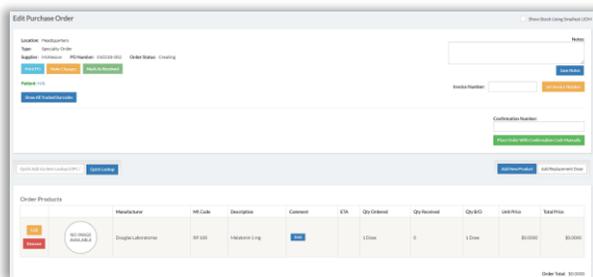
Changing Prices:

If you change Price (per Package) and click **Add to Order**, system will ask if you are sure

- If you click **Ok**, this will be the new price for the item for all transactions going forward
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears



Product you chose is at bottom:

		Manufacturer	ME Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/O	Unit Price	Total Price
Edit	Remove		Douglas Laboratories	RP 100	Melatonin 1 mg	Edit	1 Dose	0	1 Dose	\$0.0000	\$0.0000

Order Total is \$0, since this is not a Purchase Order

2. If you wish:

- Click **Edit** to set product ETA, or to change quantity, package or price
- Click **Remove** to remove a product
- Add other products, or search other suppliers
- Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**

Screen refreshes, and button is now faded

This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see [Receive Orders](#))

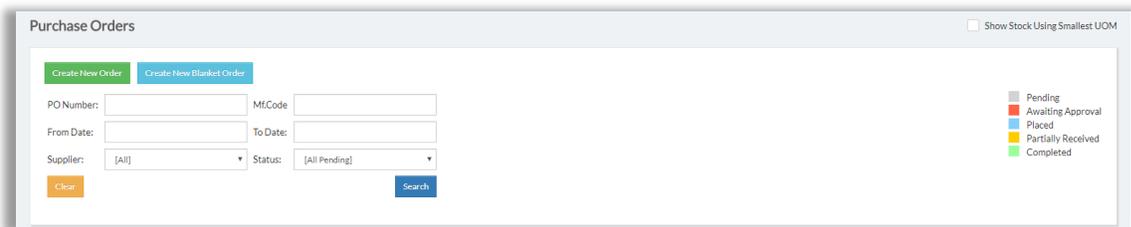
Create Replacement Orders

You can use a Replacement Order to order free replacement items

Set Up Order

1. To create a Purchase Order, go to Top Menu, click **Procurement**, and select **Purchase Orders**

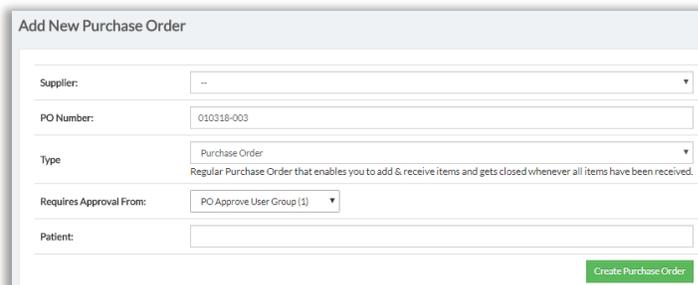
Purchase Order screen appears



The screenshot shows the 'Purchase Orders' screen. At the top left, there are two buttons: 'Create New Order' (green) and 'Create New Blanket Order' (blue). Below these are input fields for 'PO Number', 'MfCode', 'From Date', and 'To Date'. There are also dropdown menus for 'Supplier' (set to '[All]') and 'Status' (set to '[All Pending]'). A 'Clear' button is on the left and a 'Search' button is on the right. On the far right, there is a legend with five colored squares: grey for 'Pending', red for 'Awaiting Approval', blue for 'Placed', yellow for 'Partially Received', and green for 'Completed'. A checkbox labeled 'Show Stock Using Smallest UOM' is located in the top right corner.

2. Click **Create New Order**

Add New Purchase Order screen appears



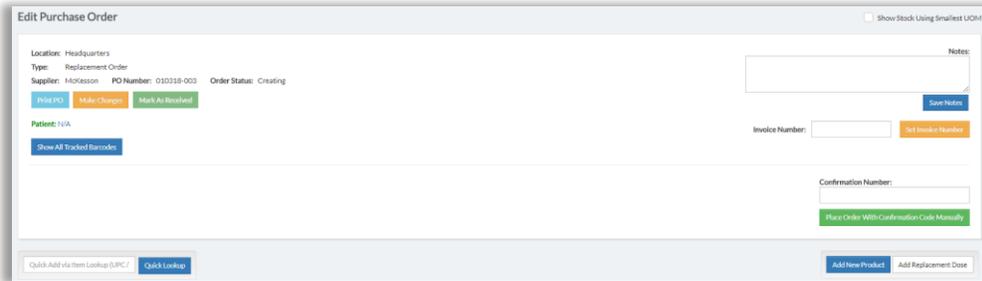
The screenshot shows the 'Add New Purchase Order' screen. It features several input fields: 'Supplier' (a dropdown menu with '--' selected), 'PO Number' (containing '010318-003'), 'Type' (a dropdown menu with 'Purchase Order' selected and a description below: 'Regular Purchase Order that enables you to add & receive items and gets closed whenever all items have been received.'), 'Requires Approval From' (a dropdown menu with 'PO Approve User Group (1)' selected), and 'Patient' (an empty text field). A green 'Create Purchase Order' button is located at the bottom right.

3. Complete fields

- Supplier – required
- PO Number – system-generated, but you can change it
- Type – Set as “Replacement Order”

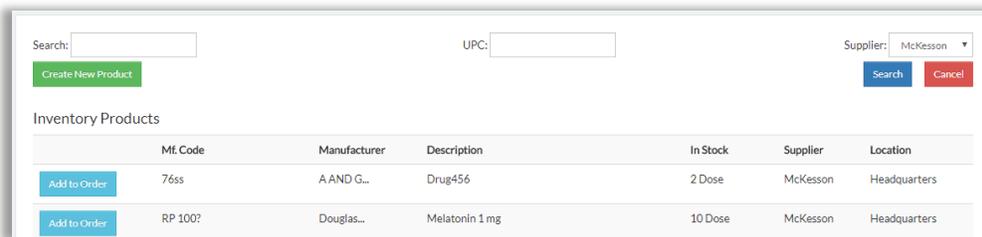
4. Click **Create Purchase Order**

Edit Purchase Order screen appears



5. Go to lower right and click **Add New Product**

Popup appears



6. Click in Search box, type product name, and press Enter;

Or, click in UPC box and scan UPC

System shows search result

	Mf. Code	Manufacturer	Description	In Stock	Supplier	Location
Add to Order	RP 100	Douglas...	Melatonin 1 mg	16 Dose	McKesson	Headquarters

7. Click **Add to Order**

System shows product details

NO IMAGE AVAILABLE	MF Code:	RP 100	Manufacturer:	Douglas Laboratories
	Product Name:	Melatonin 1 mg		
	Specs:			
	Supplier:	McKesson	Price:	\$3.00 per Dose Dose 16 Dose
	Location:		In Stock:	
Quantity:	<input type="text"/>	ETA:	<input type="text"/>	
Price (per Package): \$	<input type="text" value="0"/>	Package:	Dose	<input type="button" value="Add to Order"/>

8. Enter Quantity (required) and set other fields as desired, then click **Add to Order**

Changing Prices:

If you change Price (per Package) and click **Add to Order**, system will ask if you are sure

- If you click **Ok**, this will be the new price for the item for all transactions going forward
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
 - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
 - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears

Order Products	Manufacturer	MF Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/C	Unit Price	Total Price
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Douglas Laboratories	RP100	Melatonin 1 mg			1 Dose	0	1 Dose	\$3.0000	\$3.0000

Product you chose is at the bottom:

Order Products	Manufacturer	MF Code	Description	Comment	ETA	Qty Ordered	Qty Received
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Douglas Laboratories	RP 100	Melatonin 1 mg	<input type="button" value="Edit"/>		1 Dose	0

Order Total is \$0, since this is not a Purchase Order

2. If you wish:
 - Click **Edit** to set product ETA, or to change quantity, package or price
 - Click **Remove** to remove a product
 - Add other products, or search other suppliers
 - Type Notes (optional) and click **Save Notes**
 - Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**
Screen refreshes, and button is now faded
This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see [Receive Orders](#))

Order Replacement Dose

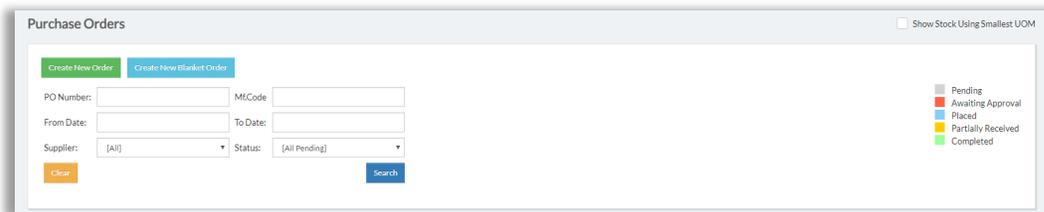
If your system build has Dose Tracking, you can order a dose to replace one that has been Dispensed or Reserved; or one still in stock that is no longer usable

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

You can order a Replacement Dose as part of any order type (Purchase, Sample, Specialty, or Replacement)

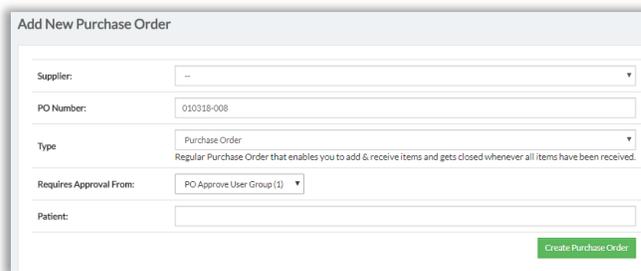
Important: Ordering a replacement dose will not delete the old dose from the Inventory. To order a replacement dose and delete the old dose at the same time, use the Remove Dose feature in Transaction History report (see [Remove Doses](#))

1. Go to Top Menu, click **Procurement**, and select **Purchase Orders**
Purchase Order screen appears



2. Click **Create New Order**

Add New Purchase Order screen appears

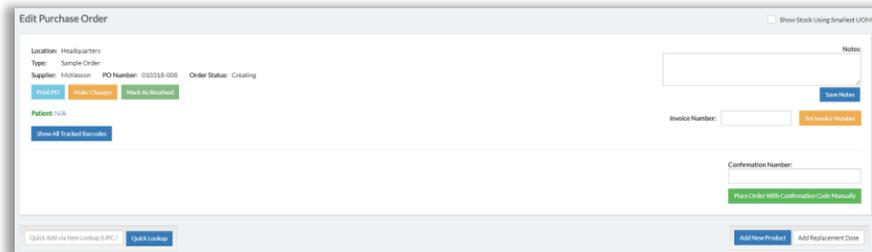


3. Complete fields:

- Supplier – required
- PO Number – system-generated, but you can replace this with any number you wish
- Type – set as desired
- Requires Approval From – only for Purchase Orders – provide name of Approver

4. Click **Create Purchase Order**

Edit Purchase Order screen appears



5. Go to the right and click **Add Replacement Dose**

Popup appears

Add a Replacement Dose ✕

Dose Number:

Add Dose

This will NOT delete the old dose from inventory.
To Delete a dose and add a replacement dose
please use "Remove Dose" button in Transaction History report.

6. Click in box Dose Number, then:
 - a. Scan /type in Dose Number of dose being replaced
 - b. Click **Add Dose**

System provides Success message and returns to Edit Purchase Order screen

Edit Purchase Order Show Stock Using Smallest UOM

Location: Headquarters
 Type: Sample Order
 Supplier: InChesson PO Number: 010318-005 Order Status: Creating

Print PO
Make Change
Add to Backlog

View All Stock Records
Invoice Number: Get Invoice Number

Confirmation Number: Place Order With Confirmation Code Message

Quick Add to Item Lookup (LPC) Quick Lookup
Add New Product Add Replacement Dose

Order Products	Manufacturer	MF Code	Description	Comment	ETA	Qty Ordered	Qty Received	Qty B/O	Unit Price	Total Price
Edit Remove	Douglas Laboratories	RP 100	MELATONIN 1 mg Replacement for JFF53758	Add		1 Dose	0	1 Dose	\$0.0000	\$0.0000

Dose you ordered is at the bottom, marked "Replacement," with the number of the dose being replaced

	Manufacturer	Mf. Code	Description
Edit Remove	Douglas Laboratories	RP 100	Melatonin 1 mg Replacement for JFF53758

7. Add other replacement doses as needed
8. Add non-replacement-dose products as needed (process is same for any order type; for an example, please see [Create Purchase Orders: Set Up Order, Steps 5-8](#))

9. Next:

If this is a Sample, Specialty, or Replacement Order; or if this is a Purchase Order, and the product does not need approval:

- a. If desired, provide Confirmation Number
- b. Click **Place Order With Confirmation Code Manually**, then **Ok**
- c. Screen refreshes, and button you clicked is now faded
**This confirms order has been created

Of, if this a Purchase Order, and the product requires approval:

- a. If desired, provide Confirmation Number
- b. Click button **Send PO to [x] for approval**, where [x] is the approving person or group you chose in Step 3
- c. Screen refreshes, and button is replaced by message:
"Awaiting approval from [x]"
Order will not be created until approval received (see below)

Remember: Ordering a replacement dose does not delete the old dose if it is still in stock. To order replacement dose and delete the old dose at the same time, see

[Remove Doses](#)

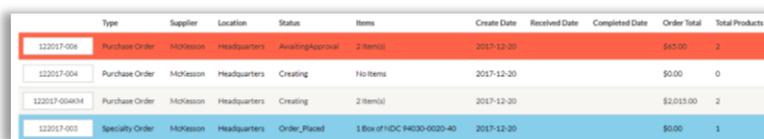
Approve Orders

If you are an Approver, you can approve orders as follows:

1. Go to Top Menu and click **Procurement**, then **Purchase Orders**

Purchase Order screen appears

Orders requiring approval will be in Red



Type	Supplier	Location	Status	Items	Create Date	Received Date	Completed Date	Order Total	Total Products
122017-006	Purchase Order	McKesson	Headquarters	Awaiting approval	2 Item(s)	2017-12-20		\$61.00	2
122017-004	Purchase Order	McKesson	Headquarters	Creating	No Items	2017-12-20		\$0.00	0
122017-004034	Purchase Order	McKesson	Headquarters	Creating	2 Item(s)	2017-12-20		\$2,015.00	2
122017-003	Specialty Order	McKesson	Headquarters	Order Placed	1 Box of H/DIC 94030-0020-40	2017-12-20		\$0.00	1

2. Do one of the following:

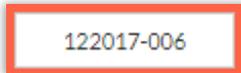
To reject the order:

Click **Cancel**, then **Ok**

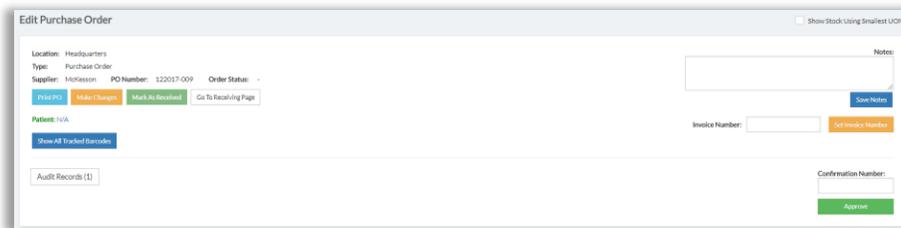
OR

To approve the order:

- a. Go to the left and click the order number box



- b. Edit Purchase Order Screen appears



- c. Go to right and provide Confirmation Number if desired
- d. Click **Approve**, then **Ok**

Approve button is replaced with a faded green button

**This means order has been Approved

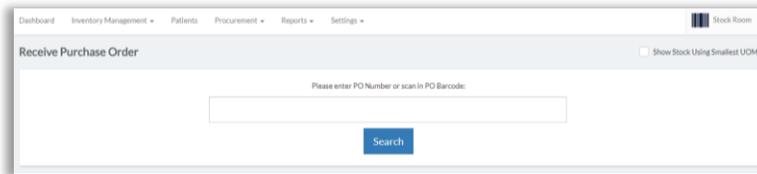
Scan In Items

Receive Orders

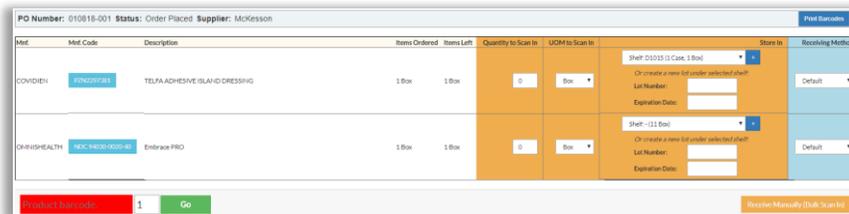
Receiving orders is the recommended way to add items to your inventory

The process is the same for all orders (Purchase, Sample, Specialty, or Replacement)

1. Go to Top Menu, click **Procurement**, and select **Receive Order**
Receive Purchase Order screen appears



2. Click in large search field and type order number **Or**, scan bar code found on paper copy of order
3. Click **Search**
Receive Order Details Screen appears



Alternate Method:

- a. Go to Top Menu, click **Procurement**, and select **Purchase Orders**

Purchase Order screen appears, with existing orders at the bottom

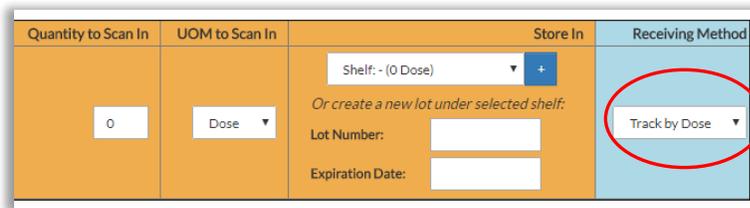
Type	Supplier	Location	Status	Items	Create Date	Received Date	Completed Date	Order Total	Total Products	B/O Products	Patient
120717-003	Purchase Order	McKesson	Headquarters	Order_Placed	1 Box of PZN2297381	2017-12-07		\$25.00	1	1	Cancel Receive
120717-002	Purchase Order	McKesson	Headquarters	Creating	1 Box of PZN2297381	2017-12-07		\$25.00	1	1	Cancel

- b. Use search fields to locate the order you wish to receive, then click **Receive** button
Receive Order Details Screen appears

4. Provide for each line item:

- a. Quantity to Scan In (required)
- b. Shelf – Set as desired, or click  to create new shelf
- c. Lot Number (optional)
- d. Expiration Date (recommended – enables system to track expiration dates and suggest reorders (see [Dashboard Overview](#)))
- e. Receiving Method – Set as desired, if you wish to track items

- Tracked items receive a unique ID number and can be Dispensed or Reserved individually (see [Dispense Non-Dose Items](#) and [Reserve Items](#))
- If your system build supports Dose Tracking, and the item is a product for which you indicated “Is Dose” (see [Manually Create a New Product](#)), then the item will be considered a Tracked Dose, and Receiving Method will be already set to “Track by Dose”

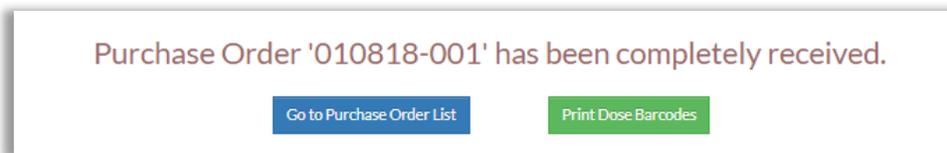


Quantity to Scan In	UOM to Scan In	Store In	Receiving Method
0	Dose	Shelf: - (0 Dose) + <i>Or create a new lot under selected shelf:</i> Lot Number: <input type="text"/> Expiration Date: <input type="text"/>	Track by Dose

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

- If item is Replacement Dose (see [Order Replacement Dose](#)), then Receiving Method is already set to “Track by Dose”. The reason is the new dose is replacing a Tracked Dose, so it also must be tracked

5. When finished, click **Receive Manually (Bulk Scan in)**, then **Ok**
Success screen appears



Purchase Order '010818-001' has been completely received.

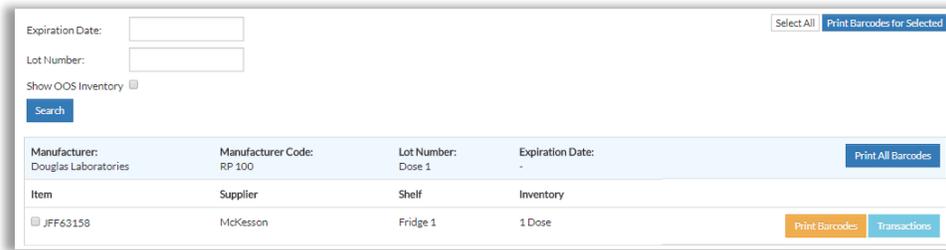
[Go to Purchase Order List](#) [Print Dose Barcodes](#)

- The button  pertains to Tracked Doses

If you received Tracked Doses it is recommended you print dose barcodes now (see next)

Print Dose Barcodes After Receiving

1. System is showing Success screen (see above)
2. Click button **Print Dose Barcodes**
3. Popup appears



Expiration Date: Select All Print Barcodes for Selected

Lot Number:

Show OOS Inventory

Manufacturer:	Manufacturer Code:	Lot Number:	Expiration Date:	<input type="button" value="Print All Barcodes"/>
Douglas Laboratories	RP 100	Dose 1	-	
Item	Supplier	Shelf	Inventory	
<input type="checkbox"/> JFF63158	McKesson	Fridge 1	1 Dose	<input type="button" value="Print Barcodes"/> <input type="button" value="Transactions"/>

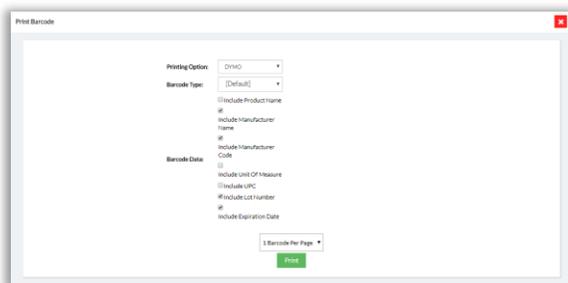
4. Under column Item, check the box for dose(s) to print



Item
<input checked="" type="checkbox"/> JFF63158

5. Click **Print Barcodes**

Popup appears



Print Barcodes

Printing Option:

Barcode Type:

Include Product Name
 Include Manufacturer Name
 Include Manufacturer Code

Barcode Data:
 Include Unit Of Measure
 Include UPC
 Include Lot Number
 Include Expiration Date

6. Set / check fields as desired, then click **Print**

Browser will download print pdf. Open it, and you will see barcode(s)

- System provides one barcode per dose
- Barcode format is “[Dose Tracking Number] – [Order Number]”:



7. You can also print Dose Barcodes from the Inventory List (see [Print Barcodes for Doses](#)) or from the Doses in Shelves report (see [Doses in Shelves](#))

Partially Receive Orders

ArbiMed lets you scan in part of an order, and later scan in the remaining part
Each part is called a “Shipment”

There are two main stages:

1. Receive Initial Shipment(s)
2. Receive Final Shipment

Receive Initial Shipment(s)

1. On Receive Order Details Screen (see above), set Quantity to Scan In and UOM to Scan In for product(s) for first Shipment

Mnf.	Mnf. Code	Description	Items Ordered	Items Left	Quantity to Scan In	UOM to Scan In	Store In
OMNISHEALTH	NDC:94930-0020-40	Embrace PRO	1 Box	1 Box	1	Box	Shelf: - (10 Box) + Or create a new lot under selected shelf: Lot Number: <input type="text"/> Expiration Date: <input type="text"/>
COVIDIEN	PZN:2297381	TELFA ADHESIVE ISLAND DRESSING	1 Box	1 Box	0	Box	Shelf: D1015 (5 Box) + Or create a new lot under selected shelf: Lot Number: <input type="text"/> Expiration Date: <input type="text"/>

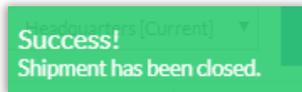
2. Set other fields as needed, and click **Receive Manually (Bulk Scan-In)**, then **OK**
Screen refreshes to show received item in green
Status is “Partially Received”

Mnf.	Mnf. Code	Description	Items Ordered	Items Left	Quantity to Scan In	UOM to Scan In	Store In
OMNISHEALTH	NDC: 94030-0020-40	Embrace PRO	1 Box	0 Box			
COVIDIEN	P2N2297381	TELFA ADHESIVE ISLAND DRESSING	1 Box	1 Box	0	Box	Shelf: D1015 (5 Box) Or create a new lot under selected shelf: Lot Number: <input type="text"/> Expiration Date: <input type="text"/>

Note: If you Partially Receive units of one line item, system will not show a green row but rather the unit count change. For instance, if you order two units of a product, then Receive only one of them, the screen will show:

Items Ordered	Items Left	Quantity to Scan In	UOM to Scan In
2 Dose	1 Dose	0	Dose

- Go down and click **Close Shipment**, then **OK**
System gives Success message



- Repeat above steps to receive additional shipment(s)
- If any Shipment includes Tracked Dose(s), it is recommended you print dose barcodes now (see [Print Dose Barcodes After Receiving](#), beginning with Step 2)

Receive Final Shipment

- Click **Go to Purchase Order List** and locate order:



Blue "Shipments" button indicates some items received



2. To receive rest of order:

a. Click **Receive**

Receive Order Details Screen appears as before
Item(s) already received shown in green row

Mnf.	Mnf. Code	Description	Items Ordered	Items Left	Quantity to Scan In	UOM to Scan In
OMNISHEALTH	NDC 94030-0020-40	Embrace PRO	1 Box	0 Box		
COVIDIEN	PZN2297381	TELFAADHESIVE ISLAND DRESSING	1 Box	1 Box	0	Box

b. Complete fields as desired

c. Click **Receive Manually (Bulk Scan-In)**, then **OK**

3. To review Shipment Numbers:

a. Click **Go to Purchase Order List**

b. Set Status to "Completed," then click **Search**

c. Locate the order, which will appear as follows:

PO Number	Purchase Order	Supplier	Headquarters	Status	Item(s)	Date
122917-004	Purchase Order	McKesson	Headquarters	Completed	2 Item(s)	2017-12-29

d. Go to right and click **Shipments**

Popup appears

Shipment #	Status	Received Date
122917-004-1	Closed	2017-12-29
122917-004-2	Closed	2017-12-29

Shipment # is unique for each shipment, and is composed of the order number with a different suffix (-1, -2 etc.) for each shipment

e. Click a Shipment #, and you can see the product(s) received

Shipment Products				
	Manufacturer	Mf. Code	Description	Quantity Scanned
	OMNISHEALTH	NDC 94030-0020-40	Embrace PRO	1 Box

Print Barcodes for Doses

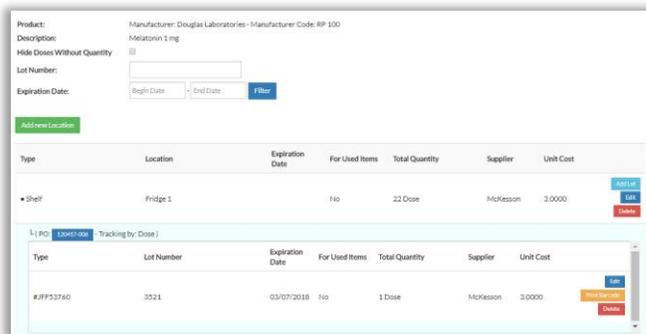
If your system build has Dose Tracking, you can print dose barcodes from the Inventory List

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

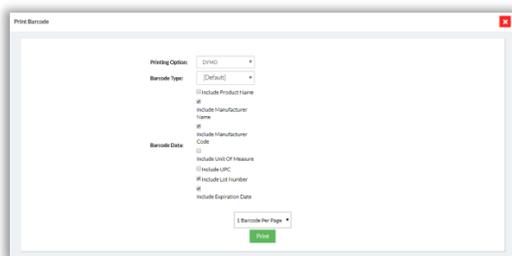
1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
 2. Search for desired product, then go to right to In Stock column and click box
- Example:



Dose stock appears



3. Locate dose to print, then go to right and click **Print Barcode**
- Print popup appears



4. Set / check fields as desired, then click **Print**
- Browser will download print pdf, which you can print

Add Inventory on Stock Room

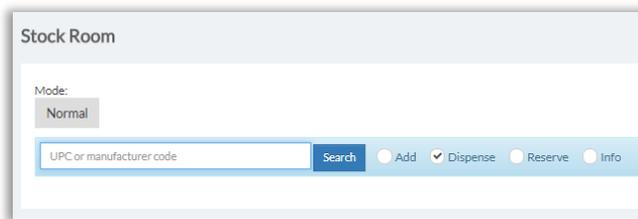
It is recommended that you add items to the inventory by using the Receive Orders process (see [Receive Orders](#)), but if necessary you can still add solo items to the Inventory

If your system build supports Dose Tracking, you can only add tracked doses by Receiving Orders

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Top Menu, to the upper right, and click **Stock Room**

Stock Room screen will appear

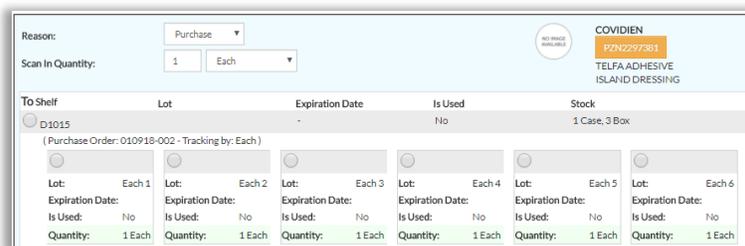


2. Click the **Add** circle
3. Click in Search box and scan UPC;

Or, type product name, and click small info box that appears:



System will display product details



4. Set Scan-In Quantity and Unit of Measure (drop-down menu)

The screenshot shows a software interface with the following elements:

- Reason:** A dropdown menu set to "Purchase".
- Scan In Quantity:** A text input field containing "1" and a dropdown menu set to "Each". This entire field is circled in red.
- Table:** A table with columns: "To Shelf", "Lot", "Expiration Date", and "Is Used".
 - Row 1: "D1015", "-", "No".
 - Row 2: "(Purchase Order: 010918-002 - Tracking by: Each)".
 - Row 3: Four columns, each with a radio button.
 - Row 4: "Lot: Each 1", "Lot: Each 2", "Lot: Each 3", "Lot: Each 4".
 - Row 5: "Expiration Date:", "Expiration Date:", "Expiration Date:", "Expiration Date:".

5. Click **Scan In**

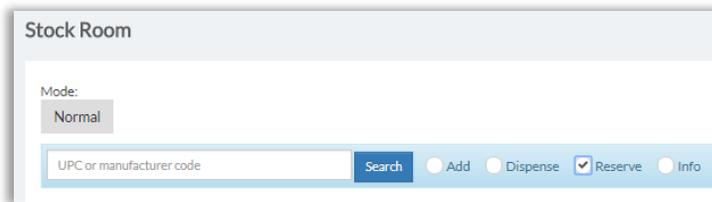
Scan Out Items

Scan-Out comprises two functions: Dispense and Reserve

Reserve Items

ArbiMed allows you to reserve (set aside) items to certain individuals. These items will be removed from the Inventory.

1. Go to upper right of screen, click **Stock Room**, and click the **Reserve** circle

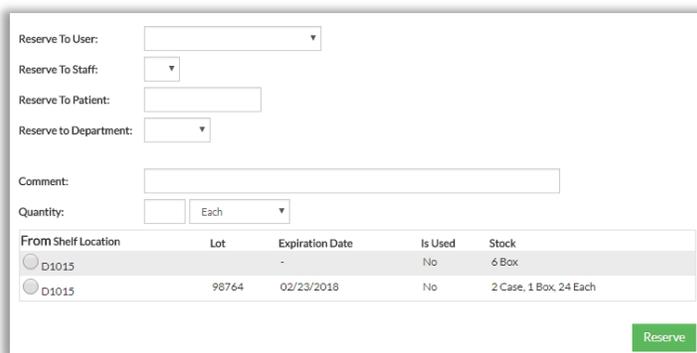


The screenshot shows the 'Stock Room' interface. At the top, it says 'Mode: Normal'. Below that is a search bar with the placeholder text 'UPC or manufacturer code'. To the right of the search bar are five radio buttons: 'Add', 'Dispense', 'Reserve', and 'Info'. The 'Reserve' radio button is selected.

2. Click in Search field and scan UPC or Dose Tracking Number;
Or, type product name, and click small info box that appears:



Product stock details appear



The screenshot shows the 'Reserve To User' form. It has several dropdown menus for 'Reserve To User', 'Reserve To Staff', 'Reserve To Patient', and 'Reserve to Department'. There is a 'Comment' text field and a 'Quantity' field with a dropdown set to 'Each'. Below the form is a table with the following data:

From Shelf Location	Lot	Expiration Date	Is Used	Stock
<input type="radio"/> D1015		-	No	6 Box
<input type="radio"/> D1015	98764	02/23/2018	No	2 Case, 1 Box, 24 Each

A green 'Reserve' button is located at the bottom right of the form.

3. Complete fields as follows:

- a. Complete "Reserve To" fields as needed
- b. Indicate Quantity and Package
- c. Click circle for From Location (if reserving a Tracked Dose (see [Receive Orders](#), Step 2) click the circle for the Dose)

4. Click **Reserve**

System will give Success message

Item has been removed from Inventory and cannot be Dispensed

Unreserve Items

Two methods are available:

- Use Reserved Items List
- Use Stock Room

Use Reserved Items List:

1. Go to Top Menu and click **Inventory Management**, then **Reserved Items**

Reserved Items appear

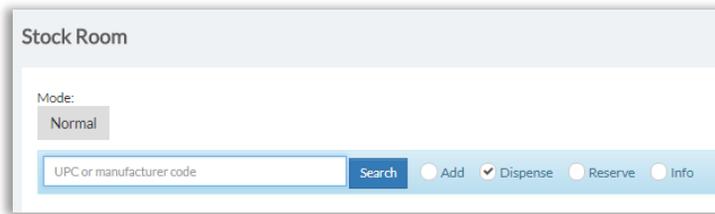


Manufacturer	Manufacturer Code	Description	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From	Reserve Date	Reserved By	Comment	Reserved Quantity	Value	
DYNAREX CORPORATION	4301	Cotton Tipped Applicators	-	-	-	Jeff Jones	4301 (New)	12/11/2017 12:41:24 PM	Jeff Chou (jeffchou@chou-pl.com)		1 Box	\$3.10	Scan Back

2. Locate item, then click **Scan Back** to move it back into Inventory

Use Stock Room:

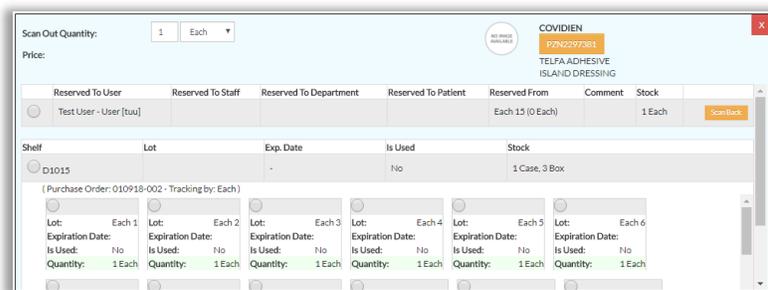
1. Go to upper right of screen and click **Stock Room**



2. Leave Dispense circle selected
3. Click in Search field and scan UPC or Dose Tracking Number;
Or, type product name, and click small info box that appears:



Product stock details appear



Screen also shows currently reserved unit(s)

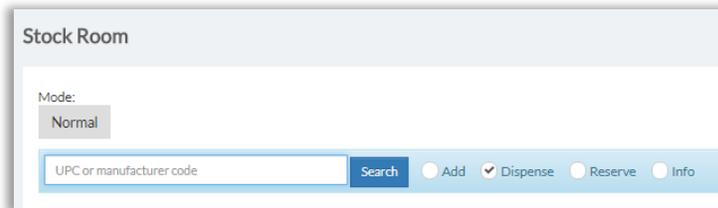
	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From	Comment	Stock
<input type="radio"/>	Test User - User [tuu]				Each 15 (0 Each)		1 Each

(In this graphic "Each 15" is the name of the lot the item was reserved from;
at this point the lot contains 0 units)

4. Click circle for unit(s) to Unreserve; then click **Scan Back**, and **Ok**
System gives Success message

Dispense Non-Dose Items

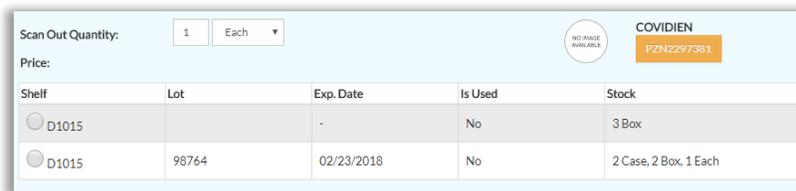
1. Go to the upper right of the screen, and click **Stock Room**
Stock Room screen will appear, with Dispense as default option



2. Click in Search field and scan UPC;
Or, type product name, and click small info box that appears:

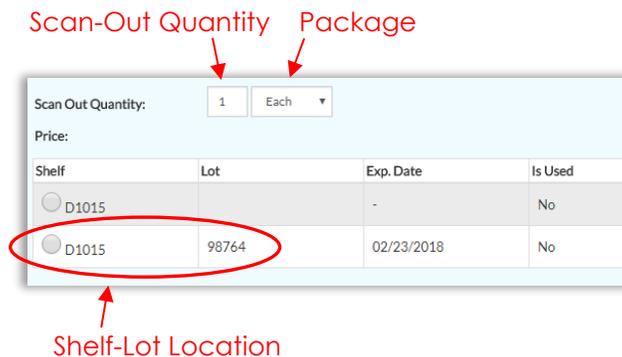


System will display in-stock units



Shelf	Lot	Exp. Date	Is Used	Stock
<input type="radio"/> D1015		-	No	3 Box
<input type="radio"/> D1015	98764	02/23/2018	No	2 Case, 2 Box, 1 Each

Note the fields:



3. Select Scan-Out Quantity, Package, and Shelf-Lot Location
4. Go to right and complete optional fields:
 - Reason (Usage or Adjustment)
 - Doctor
 - Department
 - Customer/Patient
5. Click **Dispense**, and System will confirm:

Product stock decreased by 1 Each. Was: 2 Case, 5 Box, 1 Each --- Now: 2 Case, 5 Box

Undispense Non-Dose Items

1. Go to Top Menu and click **Reports**, then **Transaction History**
2. Populate search fields, then click **Search**

System displays transactions

- Red means "Scanned Out"
- Green means "Scanned In"

Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	\$0.0000	\$1.0524	-1 Box	2 Case, 6 Box, 1 Each	\$0.0000	(\$26.3100)	02/23/2018
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	\$1.0000	\$1.0524	1 Box	2 Case, 7 Box, 1 Each	\$25.0000	\$26.3100	02/23/2018

3. Locate transaction you want, then click  to open the row
4. Click 

Popup appears

5. Click **Cancel Transaction**, then **Ok**
System gives Success message
6. Close popup

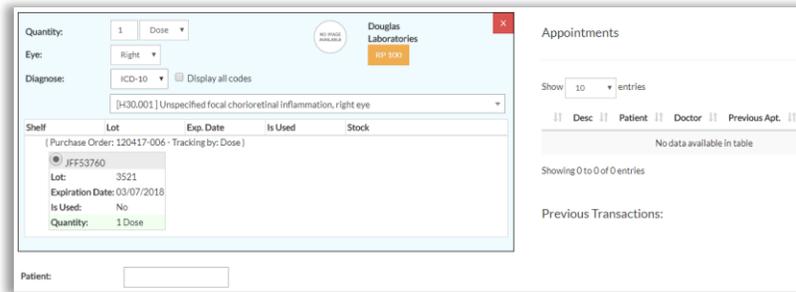
Dispense Doses

If your system build has Dose Tracking, you can Dispense tracked doses (see [Receive Orders](#))

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to upper right, and click **Stock Room**
Stock Room screen will appear
Dispense is default option

2. Click in Search box and scan / type in dose tracking number, then click **Search**
Dose information appears



3. Go to Diagnosis and select ICD code. If necessary, check Display all codes, and use drop-down to change ICD 10, 9 etc.

4. Now indicate patient receiving dose

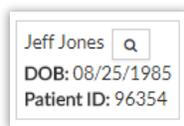
Important: Patient Name is **required** for doses received from specialty orders;

The name here must match the name on the order (see [Create Specialty Orders](#): Set Up Order)

The drug must also be assigned to the patient in the Patient List (see [Create Patient List](#))

Option 1:

- a. Click in Patient box and scan patient number; or type patient name
System provides small info box

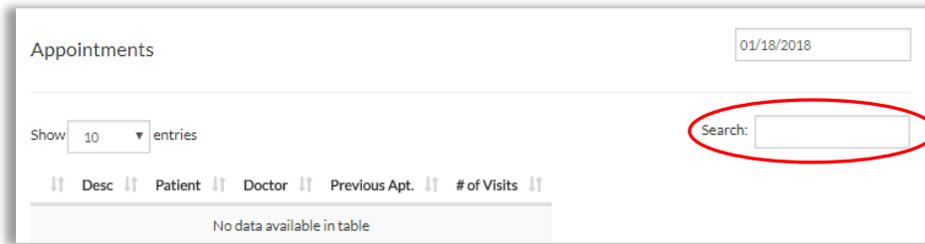


- b. Click the box
- c. Patient is now chosen

OR

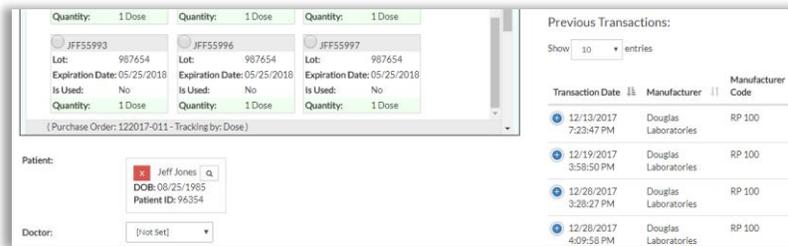
Option 2:

- a. If you have practice management software integration with ArbiMed, go to right to Appointments section, and use Search box to find an appointment



- b. System returns results
- c. Select correct appointment with patient
- d. Patient is now chosen

5. System shows patient details



System also provides patient's previous transaction detail

Transaction Date	Manufacturer	Manufacturer Code	Quantity	UOM	Reason	Doctor
12/13/2017 7:23:47 PM	Douglas Laboratories	RP 100	1	Dose	Usage	Dr Smith
12/19/2017 3:58:50 PM	Douglas Laboratories	RP 100	1	Dose	Usage	null

6. Review or set other fields as needed, then click **Dispense Dose**

System gives confirmation

Product stock decreased by 1 Dose. Was: 13 Dose --- Now: 12 Dose

- a. Note: When you click **Dispense Dose**, system may ask for confirmation based on product's Usage Warning Days (see [Manually Create a New Product](#))

Requires Approval ✖

This patient has one or more previous treatment(s) on the same eye.
Please confirm and type approval description if you want to continue.

Manufacturer	Manufacturer Code	Eye	Transaction Date
Douglas Laboratories	RP 100	Right	December 28th 2017, 9:28:27 AM

Approval notes (Required)

Confirm

Assign Dose

- b. If this happens, type Approval notes (Required), check Confirm, then click **Dispense Dose**

Undispense Doses

- Go to Top Menu and click **Reports**, then **Dose Transactions**

Dose Transactions screen appears

Dose Transactions

Start Date: <input type="text" value="05/30/2018"/>	End Date: <input type="text" value="02/06/2018"/>
Eye: <input type="text" value="All"/>	Dose: <input type="text"/>
Doctor: <input type="text" value="All"/>	ICD: <input type="text"/>
PD Number: <input type="text"/>	User: <input type="text" value="All"/>
Manufacturer Code: <input type="text"/>	Is Unassigned: <input type="text" value="Not Unassigned"/>
Expiration Date: <input type="text"/>	Lot Number: <input type="text"/>
Purchase Order Type: <input type="text" value="All"/>	

Headquarters
Search

- To locate the dose, populate search fields and click **Search**

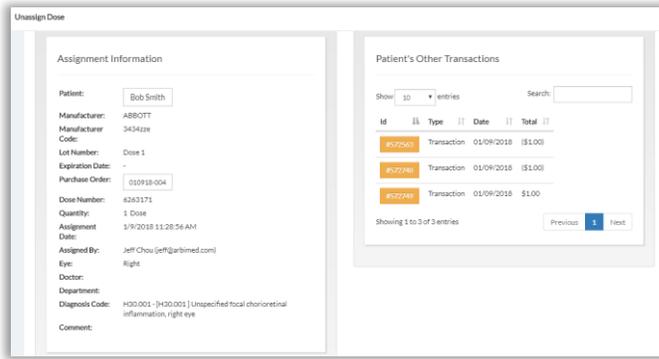
Matching dose(s) appear

Treatment Date	Patient Name	Patient ID	Manufacturer	Manufacturer Code	Product Name	Dose	Lot	Expiration Date	Purchase Order	Purchase Order Type	Eye Treated	Diagnoses Treated For	Doctor	Location	Is Unassigned
1/9/2018 11:28:56AM	Bob Smith	1165588	ABBOTT	3434ze	Drug123	02A3371	Dose 1		030918120X	Sample Order	Right	H30.001 - Unspecified focal choroidretinal inflammation, right eye	Headquarters		No

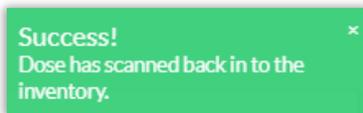
- Go to right, to column Is Unassigned and click the box "No"

(Depending on screen resolution, you may have to first click to open dose record)

Popup appears



- Confirm details and click **Unassign Dose & Scan Back In**, then **Ok**
System gives Success message

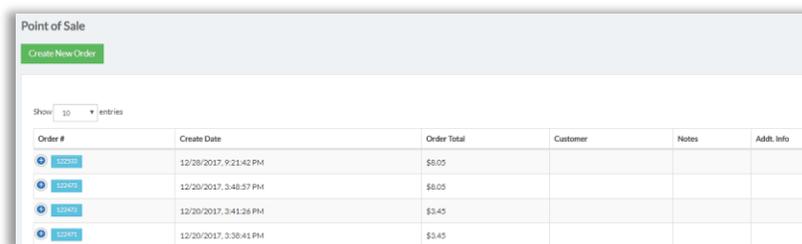


- Close popup

Dispense to Walk-In Customers (Point of Sale Order)

You can dispense items to Walk-In customers, and also print them a packaging slip

- Go to Top Menu, click **Inventory Management**, then **Point of Sale**
Point of Sale screen appears



- Click **Create New Order**
Popup appears

Name:

Address:

Products:

Scanned Out	Item	Cost	Item Retail Price	Total Retail Price	Qty	UOM	Scan Out From
Total:							
Scan a barcode here. <input type="button" value="Add Multiple Items"/>							

Notes:

Settings: Scan out products from the current location Show Prices

3. Add items by doing one of the following:

Add One Item:

- Click in box Scan a barcode here and scan barcode
- Item is added to order

Products:

	Scanned Out	Item	Cost	Item Retail Price	Total Retail Price	Qty	UOM
<input checked="" type="checkbox"/>	N	1621 TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE	\$0.0000	<input type="text" value="\$0.0000"/>	\$0.0000	<input type="text" value="1"/>	<input type="text" value="Box"/>

OR

Add Multiple items:

- Click **Add Multiple Items**

Popup appears

<input type="checkbox"/>	212354	BD	\$10.00	Each	BD BBL™ Vitamin K	McKesson	1 Each	\$10.00
<input type="checkbox"/>	PZN2297381	COVIDIEN	\$25.00	Box	TELFA ADHESIVE ISLAND DRESSING	McKesson	2 Case, 4 Box, 24 Each	\$524.00
<input type="checkbox"/>	1075538	DERMA SCIENCES	\$0.00	Box	NIUTRAMAX CHILDREN'S CHARACTER ADHESIVE BANDAGES 1075338		0	\$0.00
<input type="checkbox"/>	RP 100	Douglas Laboratories	\$3.00	Dose	Melatonin 1 mg	McKesson	16 Dose	\$48.00
USE SELECTED ITEMS								

- Check the items you want

	Mf. Code	Manufacturer	Cost	Cost UOM	Description
<input checked="" type="checkbox"/>	1621	3M	\$0.00	Box	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE
<input checked="" type="checkbox"/>	76ss	A AND G PHARMACEUTICALS	\$3.00	Dose	Drug456
<input type="checkbox"/>	12345	A G MARIN PHARMACEUTICAL	\$2.00	Box	Lot Test Bandages

USE SELECTED ITEMS bar turns dark

<input type="checkbox"/>	8883	AB7 INDUSTRIES	\$2.00	Bottle	Vitamin D2	McKesson	2 Bottle	\$4.00	
<input type="checkbox"/>	asdfjkl	AB7 INDUSTRIES	\$5.00	Bottle	DS Drug	HBOC	2 Bottle	\$10.00	
<input type="checkbox"/>	3434226	ABBOTT	\$10.00	Dose	Drug123	McKesson	9 Dose	\$90.00	

USE SELECTED ITEMS

- c. Click **USE SELECTED ITEMS** bar
Items are added to order

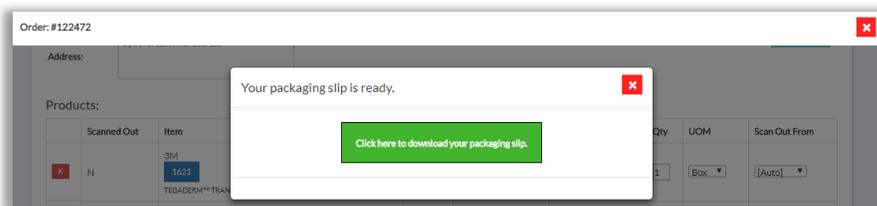
Products:

	Scanned Out	Item	Cost	Item Retail Price	Total Retail Price	Qty	UOM
<input checked="" type="checkbox"/>	N	1621 TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE	\$0.0000	<input type="text" value="\$0.0000"/>	\$0.0000	<input type="text" value="1"/>	<input type="text" value="Box"/>
<input checked="" type="checkbox"/>	N	7655 Drug#56	\$3.0000	<input type="text" value="\$3.4500"/>	\$3.4500	<input type="text" value="1"/>	<input type="text" value="Dose"/>

4. If you wish:
- Provide customer Name and Address
 - Provide Notes
 - Leave box checked for Scan out products from the current location to ensure items will be removed from Inventory
 - Leave box checked for Show Prices

5. Click **Create**

Slip Ready popup appears



Note Order Number at upper left



6. Click the button **Click here to download your packaging slip**
System opens new tab in your browser

This is the packaging slip, which you can print

Test Company 2		
Order #: 122472		
Order Date: 12/20/2017		
Quantity	Product Details	Price
1	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE(1621) (Box)	\$0.00
1	Drug456(76ss) (Dose)	\$3.45
		\$3.45

7. Close New Order popup

Point of Sale screen shows new Walk-In order you created

Note order number at left



Create Duplicate Point of Sale Order

For your convenience, you can use an existing order as a template for a new order:

1. Go to Top Menu, click **Inventory Management**, then **Point of Sale**

Point of Sale screen appears

The screenshot shows the 'Point of Sale' interface. At the top left, there is a 'Create New Order' button. Below it, there is a 'Show' dropdown menu set to '10' entries. A table lists the following orders:

Order #	Create Date	Order Total	Customer	Notes
122593	12/28/2017, 9:21:42 PM	\$8.05		
122472	12/20/2017, 3:48:37 PM	\$8.05		

2. Locate order to duplicate and click , then click **Duplicate**

Popup appears

Scanned Out	Item	Cost	Item Retail Price	Total Retail Price	Qty	UOM	Scan Out From
<input type="checkbox"/>	AB7 INDUSTRIES 8883 Vitamin D2	\$2.0000	\$2.3000	\$2.3000	1	Bottle	Shelf: 1 (▼)
<input type="checkbox"/>	AB7 INDUSTRIES 8884 D3 Ong	\$5.0000	\$5.7500	\$5.7500	1	Bottle	Shelf: 1 (▼)

Total: \$8.00

Notes:

Settings:
 Scan out products from the current location
 Show Prices

3. If you want to add additional products, scan barcode or click **Add Multiple Items**

4. Complete fields as you wish:

- Provide customer Name and Address
- Provide Notes
- Leave box checked for Scan out products from the current location to ensure items will be removed from Inventory
- Leave box checked for Show Prices

5. Scroll down and click **Create**

System gives Success message, and popup now shows packaging slip ready

Order: #122607

PRODUCTS:

Scanned Out	Item	UOM	Scan Out From
<input checked="" type="checkbox"/>	AB7 INDUS 8883 Vitamin D2	Bottle	Shelf: 1 (▼)
<input checked="" type="checkbox"/>	AB7 INDUS 8884 D3 Ong	Bottle	Shelf: 1 (▼)

Dioullas Laboratories

Your packaging slip is ready.

[Click here to download your packaging slip.](#)

Note new Order Number at upper left

Order: #122607

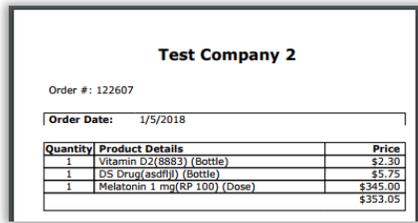
PRODUCTS:

Scanned Out	Item
<input checked="" type="checkbox"/>	AB7 INDUS 8883 Vitamin D2

Your pack

6. Click the button **Click here to download your packaging slip**

System provides slip in new tab in your browser, which you can print



Test Company 2		
Order #: 122607		
Order Date: 1/5/2018		
Quantity	Product Details	Price
1	Vitamin D2(8883) (Bottle)	\$2.30
1	DS-Orus(asdfij) (Bottle)	\$5.75
1	Melatonin 1 mg(SP 100) (Dose)	\$345.00
		\$353.05

7. Close popup

Point of Sale screen shows new Walk-In order you created

Note order number at left



Dispense or Reserve Using Bill of Materials

A Bill of Materials ("BOM") is a set of recipes that can be used to form a kit of items. A BOM is listed in the Inventory as a single item, and kits are listed as units of the BOM.

Kits can be scanned out for Dispense or Reserve, and when that happens they subtract their items from the Inventory.

Using a BOM involves three stages:

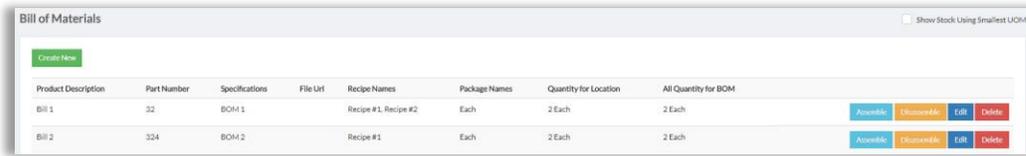
Stage 1: Create BOM

Stage 2: Assemble Kits

Stage 3: Scan Out Kits

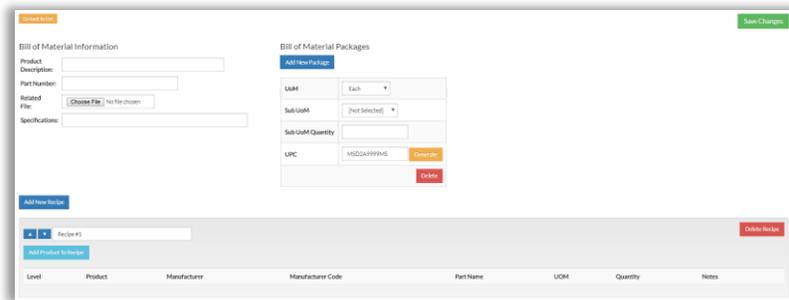
Stage 1: Create Bill of Materials

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
Bill of Materials screen appears



Product Description	Part Number	Specifications	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM				
Bill 1	32	BOM 1		Recipe #1, Recipe #2	Each	2 Each	2 Each	Assemble	Disassemble	Edit	Delete
Bill 2	324	BOM 2		Recipe #1	Each	2 Each	2 Each	Assemble	Disassemble	Edit	Delete

2. Click **Create New**
Create New Bill of Materials screen appears



Bill of Material Information

Product Description:

Part Number:

Related File: No file chosen

Specifications:

Bill of Material Packages

UOM:

Sub UOM:

Sub UOM Quantity:

LPC:

Add New Recipe

Recipe #1

Level	Product	Manufacturer	Manufacturer Code	Part Name	UOM	Quantity	Notes
-------	---------	--------------	-------------------	-----------	-----	----------	-------

3. Provide:
 - Description (just like with a product)
 - Part Number (functions in the system like Manufacturer Number does for a product)
4. Default recipe is Recipe #1. Edit this name if you wish, then add products to the recipe as follows:
 - a. Click **Add Product to Recipe**

Manufacturer Code search box appears



Manufacturer Code:

- b. Provide manufacturer code or product name, then click **Search**
Product info appears

Manufacturer Code:	8883	Search
Manufacturer	Manufacturer Code	Product Description
AB7 INDUSTRIES	8883	Vitamin D2

5. Go to right and click **Select**, and then:
 - a. Specify UOM and Quantity

Important: UOM and Quantity define the makeup of the groups, that is, the ratios of items making up the groups.
 - b. Provide Part Name (recommended) and Notes if desired
 - c. Provide additional products by clicking **Add Product to Recipe** and repeating these steps a-e
6. Go up to Bill of Materials Packages section and note the default is "Each." This is the unit of measure for each group created with this BOM. If you wish you can change this and/or create other levels of packaging
7. Click **Save Changes**

System gives Success message
8. Repeat these steps if you wish to create additional Recipes

Stage 2: Assemble Kits

Now that you have set up a Bill of Materials and created Recipe(s), use a Recipe to assemble Kits:

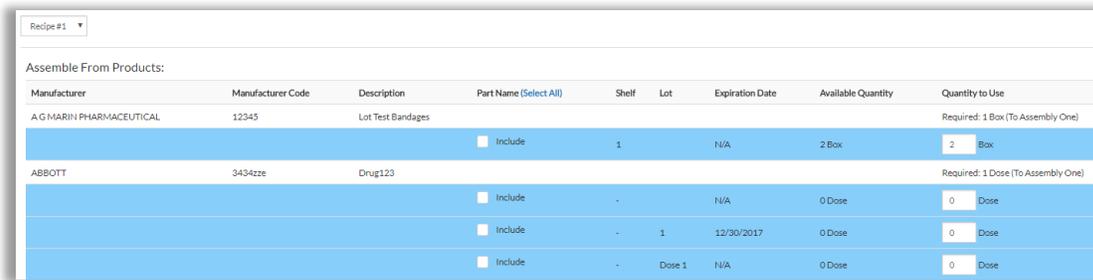
1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
2. Locate BOM you created (in this case, Bill 2)

Create New							
Name	Part Number	Description	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM
Bill 1	32	BOM 1 for test		Recipe #1, Recipe #2	Each	5 Each	5 Each
Bill 2	324	test		Recipe #1	Each	0 Each	0 Each

"0 Each" means this BOM currently has no kits

3. Go to right and click **Assemble**

Screen shows your recipe, and also the shelf-lot locations from which to obtain items for the kit



Assemble From Products:									
Manufacturer	Manufacturer Code	Description	Part Name (Select All)	Shelf	Lot	Expiration Date	Available Quantity	Quantity to Use	
A G MARIN PHARMACEUTICAL	12345	Lot Test Bandages	<input type="checkbox"/> Include	1		N/A	2 Box	2	Box
Required: 1 Box (To Assemble One)									
ABBOTT	3434zze	Drug123	<input type="checkbox"/> Include	-		N/A	0 Dose	0	Dose
Required: 1 Dose (To Assemble One)									
			<input type="checkbox"/> Include	-	1	12/30/2017	0 Dose	0	Dose
			<input type="checkbox"/> Include	-		Dose 1	N/A	0	Dose

4. Next:

- a. If you created multiple recipes for this BOM, use Recipe drop-down menu to select a recipe
- b. Check “Include” for the shelves/lots from which to pull Recipe ingredients
- c. For checked shelves/lots, indicate Quantity to Use

5. Scroll down and click **Calculate**

Counting bar appears that tells you how many kits you can make



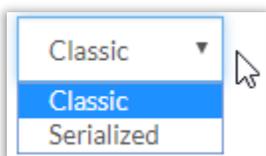
In this example, a maximum of three kits can be made

6. Drag the button to indicate how many kits you want to assemble

For instance, to make three kits, you would set the button to “3”:



7. Under Assembly Mode, select “Classic” or “Serialized”



- Serialized – Lets you create a unique barcode for each kit; replace items within the kit; and create expiration date alert for kit items.
- Classic – Lets you to build kits and track their inventory without inner item distinction.

8. Click **Choose**, then **Ok**

System gives Success message



9. Go to upper left and click **Go back to List**

Bill of Materials screen appears

Column Quantity for Location shows "3 each" for your BOM, because you just created 3 groups

Name	Part Number	Description	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM
Bill 1	32	BOM 1 for test		Recipe #1, Recipe #2	Each	5 Each	5 Each
Bill 2	324	test		Recipe #1	Each	3 Each	3 Each

If you go to Inventory List, you can locate your BOM

			324	Test Company 2	\$0.00	BOM 2 for test
--	--	--	-----	----------------	--------	----------------

Screen will show it has 3 kits



Stage 3: Scan Out Kits

Once you have formed kits, you can scan them out for Dispense or Reserve

Dispense Kits

1. First, copy your BOM's UPC:

- a. On Bill of Materials screen, locate your BOM and click **Edit**
Bill of Material Information screen appears

- b. Go to upper right, to Bill of Material Packages section, and highlight and copy the UPC code

Alternate Method:

Go to Inventory List, find the BOM and copy its UPC

2. Next, go to Stock Room
 - a. Paste UPC into Search field
Small info box appears



- b. Click the box
BOM details appear

Scan Out Quantity: Each

Price: NO IMAGE AVAILABLE 32 Test Company 2

Shelf	Lot	Recipe	Exp. Date	Is Used	Stock
<input type="radio"/> Recipe #1 (Default)		Recipe #1	-	No	1 Each
<input type="radio"/> Recipe #2 (Default)		Recipe #2	-	No	2 Each

Under column Stock, the term "Each" refers to kit(s) that you created for each Recipe

Shelf	Lot	Recipe	Exp. Date	Is Used	Stock
<input type="radio"/> Recipe #1 (Default)		Recipe #1	-	No	1 Each
<input type="radio"/> Recipe #2 (Default)		Recipe #2	-	No	2 Each

3. Click the circle for a Recipe, then set Scan Out Quantity
4. Go to right and complete other fields, then click **Dispense**
System confirms Dispense

Product stock decreased by 1 Each. Was: 3 Each --- Now: 2 Each

Reserve Kits

1. First, copy your BOM's UPC:
 - a. On Bill of Materials screen, locate your BOM and click **Edit**
Bill of Material Information screen appears

Level	Product	Manufacturer	Manufacturer Code	Part Name	UOM	Quantity	Notes
+	Cotton Tipped Applicators	ETHWANE CORPORATION	4301		Each	1	
+	Chng123	ABBOTT	3424se		Each	1	

- b. Go to upper right, to Bill of Material Packages section, and highlight and copy the UPC code

Bill of Material Packages

Add New Package

UoM: Each

Sub UoM: [Not Selected]

Sub UoM Quantity:

UPC: MSF5E3DCCMS Generate

Alternate Method:

Go to the Inventory List, find the BOM and copy its UPC

2. Next, go to Stock Room
 - a. Select Reserve
 - b. Paste UPC into Search field
- Small info box appears



- c. Click the box, and BOM details appear

Reserve To User:

Reserve To Staff:

Reserve To Patient:

Reserve to Department:

Comment:

Quantity: Each

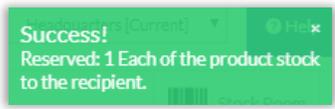
From Shelf Location	Lot	Recipe	Expiration Date	Is Used	Stock
<input type="radio"/> Recipe #1 (Default)		Recipe #1	-	No	1 Each
<input type="radio"/> Recipe #2 (Default)		Recipe #2	-	No	2 Each

Reserve

Under column Stock, the term "Each" refers to kit(s) that you created using each Recipe

Stock
1 Each
2 Each

3. Click the circle for a Recipe
4. Complete other fields, then click **Reserve**
System gives Success message



Disassemble Kits

To disassemble a kit, do the following:

Disassemble Classic Kits

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
2. Locate BOM, then click **Disassemble**

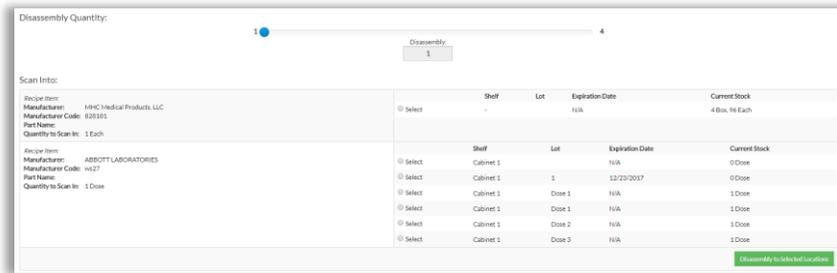
Disassemble screen appears

Recipe & Location To Disassemble:					
	Recipe	Shelf Location	Lot	Expiration Date	Stock
Select	Recipe #1	Recipe #1 (Default)		N/A	0 Each
Select	Recipe #2	Recipe #2 (Default)		N/A	4 Each

On the right under Stock you can see how many kits currently exist for a given recipe
In this case, four groups exist for Recipe #2

Stock
0 Each
4 Each

3. Now imagine we want to disassemble two kits for Recipe #2
 - Click **Select** for Recipe #2
 - Disassembly Quantity screen appears



4. Drag the button to indicate how many kits (in this case, 2)

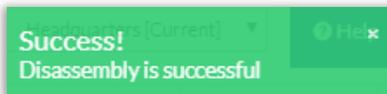


5. Select the shelf-lot locations that should receive back the kit items



6. Click **Disassembly to Selected Locations**

System gives Success message



Disassembly screen appears



Screen shows recipe with lower Stock count (in this case, 2, since $4 - 2 = 2$)

Stock
0 Each
2 Each

Disassemble Serialized Kits

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**

Bill of Materials screen appears

Product Description	Part Number	Specifications	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM	
Bill 2	324	BOM 2		Recipe #1	Each	3 Each	3 Each	Serialized Inventory
Bill 1	32	BOM 1		Recipe #1, Recipe #2	Each	1 Each	1 Each	

2. Locate desired BOM, then click **Serialized Inventory**

Popup appears

Kits

Recipe #1

KIT92799

KIT92805

3. Locate Kit to disassemble, then click its ID number (example: KIT92799)

Kit contents appear

KIT92799

Add Item to Kit

Manufacturer Code: 12345	Manufacturer Code: 3434zze
Manufacturer: A G MARIN PHARMACEUTICAL	Manufacturer: ABBOTT
Description: Lot Test Bandages	Description: Drug 123
Expiration:	Expiration:
Lot:	Lot:
Inventory Count: 1	Inventory Count: 1
Remove Put Inventory Back to Shelf	Remove Put Inventory Back to Shelf

4. Locate item to delete, then click one of the following:
 - **Remove** – Deletes item from this Kit and from Inventory
 - **Put Inventory Back to Shelf**
 - Puts the item back in the product inventory count
 - System will create a “Disassembly” shelf to receive the item
5. If desired, click **Add Item to Kit** to add a new item
6. Close popup, and refresh screen

Dispense Items With Preference Cards

For your convenience, you can create a special bar code (preference card) that can be used repeatedly to scan out certain combinations of products

Stage 1: Create Preference Card

1. Go to Top Menu, click **Inventory Management**, then **Preference Cards**

Preference Cards screen appears

Name	Description	Locations	Doctor / Staff	# of Products
Card1	test	Headquarters	All	2

2. Click **+New**

Create Preference Cards screen appears

3. Complete fields:

- Name (required)
- Description
- Location (required)
- Dispensed to Following (Doctor/Staff) (required)

4. Click in Inventory field and provide UPC, manufacturer code or product name

Small info box appears



5. Click the box

Product fields appear

Order	Image	Category	Product	Quantity	Usage Type	Notes
1	NO IMAGE AVAILABLE	-	COVIDIEN PZN2297381	0 Each ▼	Scan Out ▼	
Reorder						

6. Enter Quantity (required) and set other fields as you wish

7. Add more items as needed, then scroll down and click **Save Changes**

Use Preference Card to Dispense Items

1. Go to Top Menu, click **Inventory Management**, then **Preference Cards**

2. Locate desired card and click  to open its row

System shows buttons



3. Click **Print**, and browser opens pdf you can print. For example:

Preference Card - Card1
test

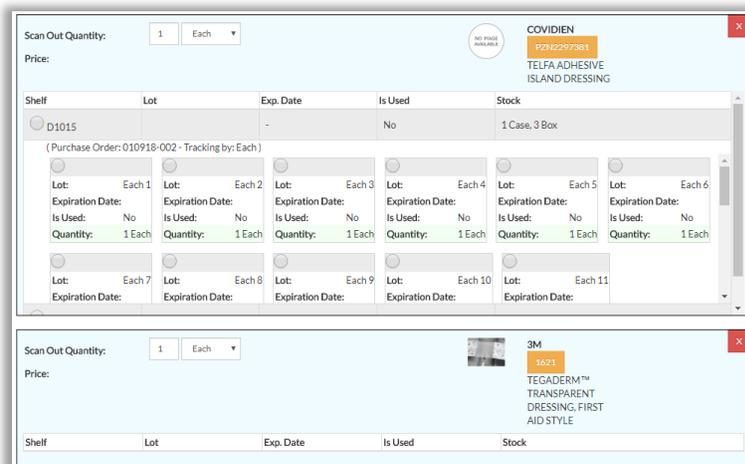
Doctor:
Patient:
Date:
Notes:

Manufacturer	MF Code	Description	Default Qty.	Used Qty.	Notes
COVIDIEN	P2N2297381	TELFA ADHESIVE ISLAND DRESSING	1 Each		
3M	1621	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE	1 Each		



4. Print pdf, then go to Stock Room and scan it for Dispense

Preference Card items appear, with Quantity and Unit of Measure set according to Card



Scan Out Quantity: 1 Each

Price:

COVIDIEN
P2N2297381
TELFA ADHESIVE ISLAND DRESSING

Shelf	Lot	Exp. Date	Is Used	Stock
D1015		-	No	1 Case, 3 Box

(Purchase Order: 010918-002 - Tracking by: Each)

Lot: Each 1	Lot: Each 2	Lot: Each 3	Lot: Each 4	Lot: Each 5	Lot: Each 6
Expiration Date:					
Is Used: No					
Quantity: 1 Each					
Lot: Each 7	Lot: Each 8	Lot: Each 9	Lot: Each 10	Lot: Each 11	
Expiration Date:					

Scan Out Quantity: 1 Each

Price:

3M
1621
TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE

Shelf	Lot	Exp. Date	Is Used	Stock
-------	-----	-----------	---------	-------

5. Make changes if necessary:
 - a. Adjust Quantity and/or Unit of Measure
 - b. Click  to remove items
 - c. Add additional items by scanning or typing UPC, or typing product name

6. Go to right and populate Reason, Doctor etc. as needed

7. Click **Dispense**
Items are scanned out of Inventory

Other Functions

Transfer Non-Tracked Items

You can transfer non-tracked items:

- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see [Manually Create a Product / Stage 2: Set Advanced Details / Step 1 / Other Location Settings / Add this product to other locations](#))

1. Go to Stock Room and click Add circle
2. Click in Search field and scan UPC;

Or, type product name, and click small info box that appears:

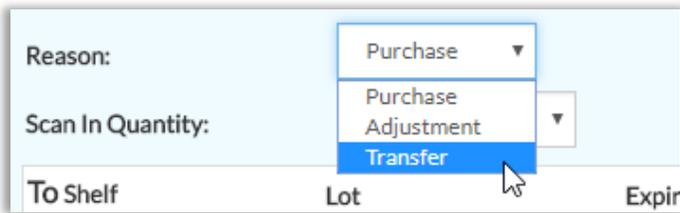


Product stock appears

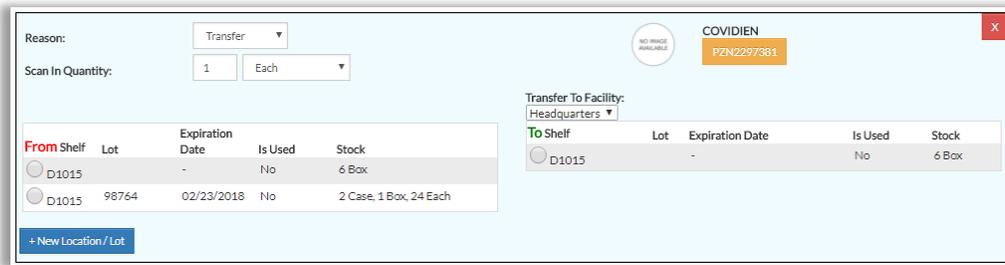
A screenshot of a software interface showing product stock. At the top, 'Reason:' is set to 'Purchase' and 'Scan In Quantity:' is '1 Each'. The product is identified as 'COVIDIEN PZN2297381'. Below is a table with columns: 'To Shelf', 'Lot', 'Expiration Date', 'Is Used', and 'Stock'. There are two rows of data. A '+ New Location / Lot' button is at the bottom left.

To Shelf	Lot	Expiration Date	Is Used	Stock
<input type="radio"/> D1015		-	No	6 Box
<input type="radio"/> D1015	98764	02/23/2018	No	2 Case, 1 Box, 24 Each

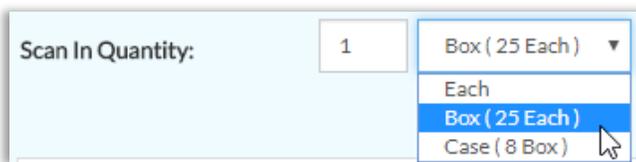
3. If you wish to add additional items, repeat Steps 2-3
4. For each product, do the following:
 - a. Set Reason to "Transfer"



Screen will display Transfer functions

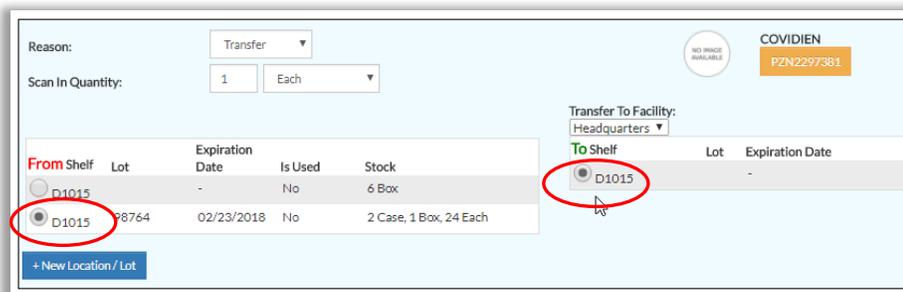


b. Set Scan In Quantity and Unit



c. Set Transfer To Facility

d. Click the circles for From and To shelf-lots



5. Click **Scan In**

Screen refreshes and confirm Transfer

Transfer Tracked Items

You can transfer non-tracked items:

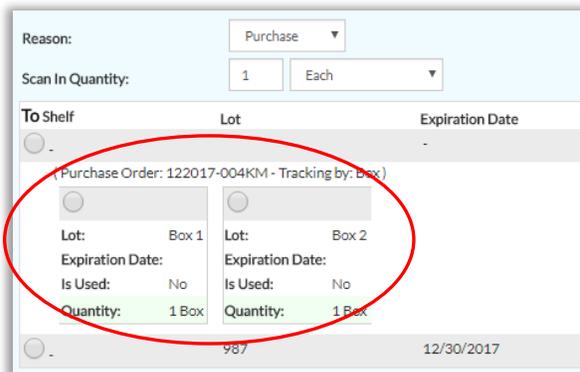
- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see Manually Create a Product / [Stage 2: Set Advanced Details](#) / Step 1 / Other Location Settings / Add this product to other locations)

1. Go to Stock Room and click Add circle
2. Click in Search field and scan UPC;

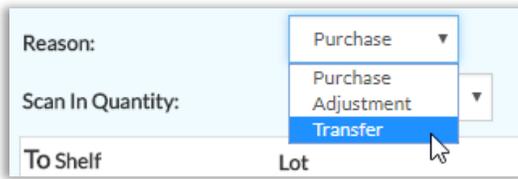
Or, type product name and click small info box that appears



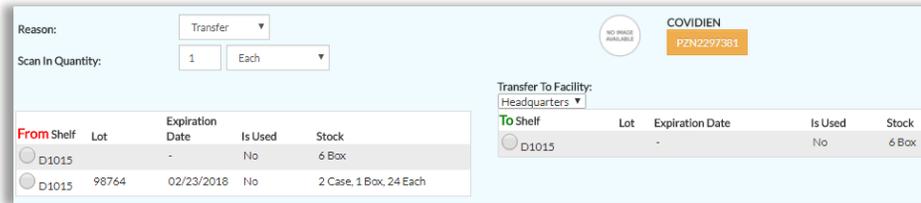
Product stock will appear, showing tracked items



3. If you wish to add additional items for Transfer, repeat Step 2
4. For each product to Transfer, do the following:
 - a. Set Reason to "Transfer"



Screen will display Transfer functions

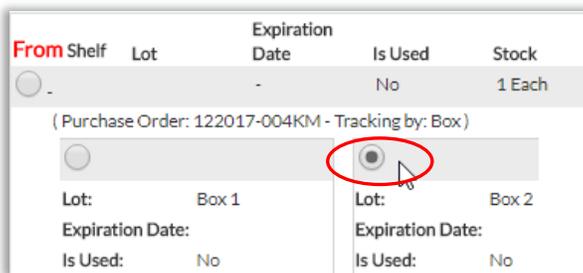


b. Set Scan In Quantity and Package



c. Select Transfer To Facility (the physical address to receive the item)

d. On the left, click the circle for the item you want to transfer:



e. On the right, click the circle for destination shelf-lot



Note: From Lot will automatically transfer to destination shelf

5. Click **Scan In**

Screen refreshes and confirms Transfer

Transfer Doses

If your system build has Dose Tracking, you can transfer doses

- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see [Manually Create a Product / Stage 2: Set Advanced Details / Step 1 / Other Location Settings / Add this product to other locations](#))

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

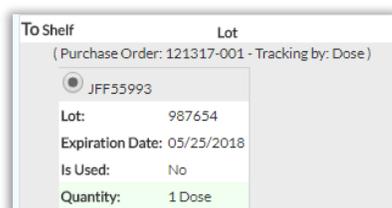
1. Go to Stock Room and click Add circle
2. Click in Search field and scan / paste / type in dose number



Alternate Method:

*You can also type in product name, and system will pull up product
However, this method only lets you transfer one dose at a time*

3. Click **Search**, and dose will appear



4. If you wish to add additional doses, repeat Steps 2-3

Doses will appear together:

Reason: Purchase
Scan In Quantity: 1 Dose
To Shelf Lot
(Purchase Order: 121317-001 - Tracking by: Dose)
● JFF55991
Lot: 987654
Expiration Date: 05/25/2018
Is Used: No
Quantity: 1 Dose
+ New Location / Lot

Reason: Purchase
Scan In Quantity: 1 Dose
To Shelf Lot
(Purchase Order: 121317-001 - Tracking by: Dose)
● JFF55993
Lot: 987654
Expiration Date: 05/25/2018
Is Used: No
Quantity: 1 Dose
+ New Location / Lot

5. For each dose, do the following:

a. Set Reason drop down menu to "Transfer"

Reason: Purchase
Scan In Quantity: 1 Dose
To Shelf Lot Expir

Screen displays Transfer functions

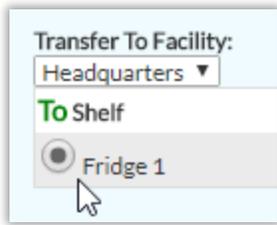
From Shelf Lot Expiration Date Is Used Stock
(Purchase Order: 121317-001 - Tracking by: Dose)
● JFF55991
Lot: 987654
Expiration Date: 05/25/2018
Is Used: No
Quantity: 1 Dose

Transfer To Facility:
Headquarters
To Shelf Lot Expiration Date Is Used Stock
● Fridge 1 - No 1 Dose

The From lot will be created under destination shelf automatically.
+ New Location / Lot

b. Select Transfer To Facility (the physical address to receive the dose)

c. Click circle for the destination shelf / lot



6. Click **Scan In**

System gives Success message

Remove Doses

“Remove” refers to deleting from the Inventory a dose that is damaged, expired or otherwise not fit for use.

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Important: Remove is not the same Scan Out, in which the dose is dispensed to a recipient

Doses are removed on the Transaction History Report. In addition, you can remove a dose and create an order for its replacement at the same time. Removed doses can be viewed on Dose Removal Report (see [Dose Removal Report](#)).

To Remove a Dose:

1. Go to Top Menu and click **Reports**, then **Transaction History**
2. Click in Search field and scan or type in dose tracking number, then press Enter
System displays dose record

Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
Douglas Laboratories	RP 100	Melatonin 1 mg	\$3.0000	\$3.4500	1 Dose	12 Dose	\$3.0000	\$3.4500	03/07/2018	JFF53756 Shelf: - Lot: 3521	12/4/2017 4:40:32 PM

- Click  to open the row, then click **Remove Dose**
Popup appears

Manufacturer: Douglas Laboratories
 Manufacturer Code: RP 100
 Lot Number: 987654
 Expiration Date: 05/25/2018
 Purchase Order: 121317-001
 Quantity: 1 Dose

Remove Reason:

Eligible for Replacement

- Select Remove Reason
- Choose one:
 - Option 1: Remove Dose without ordering replacement
 - Option 2: Remove Dose and order replacement (see further below)

Option 1: Remove Dose Without Ordering Replacement

- Provide Comments (required)
- Click **Remove Dose**, then **Ok**
System gives Success message
- Close popup, and Transaction History screen refreshes

4. If you decide later to undo the removal, go to [Dose Removal Report](#) and follow the process there (see [Dose Removal Report](#))

Option 2: Remove Dose and Order Replacement

1. Click the box next to **Eligible for Replacement**

Option boxes appear



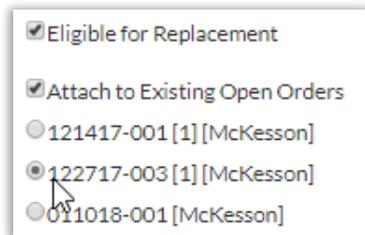
Eligible for Replacement
 Attach to Existing Open Orders Create a New Order

2. Choose one:

- Method 1: Attach to Existing Open Order
- Method 2: Create a New Order

Method 1: Attach to Existing Open Order

- a. Click **Attach to Existing Open Order**
- b. Click circle for order to attach to



Eligible for Replacement
 Attach to Existing Open Orders
 121417-001 [1] [McKesson]
 122717-003 [1] [McKesson]
 011018-001 [McKesson]

- c. Provide Comments (required)
- d. Click **Remove Dose & Attach to PO**, then **Ok**
Dose is now removed from available Inventory

Important: If you now cancel the purchase order, the dose is still removed from Inventory

- e. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number

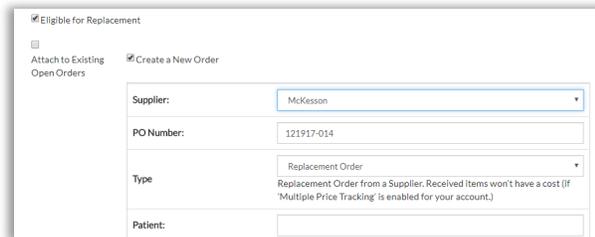


- f. Click **Place Order With Confirmation Code Manually** (or click **Send PO to ___ for approval**, if order is Purchase Order)
- g. If you decide later to undo the removal, go to [Dose Removal Report](#) and follow the Unremove process there (see [Dose Removal Report](#))

Method 2: Create a New Order

- a. Click **Create a New Order**

Order fields appear



- b. Set/populate fields:
- Supplier (required)
 - Type – default is Replacement Order. Change if desired
 - Patient
 - Comments (required)
- c. Click **Remove Dose & Attach to PO**, then **Ok**
Dose is now removed from available Inventory

Important: If you now to cancel the purchase order, the dose is still removed from Inventory

- d. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number

- e. Click **Place Order With Confirmation Code Manually** (or click **Send PO to ___ for approval**, if order is Purchase Order)
- f. If you decide later to undo the removal, go to [Dose Removal Report](#) and follow the Unremove process there (see [Dose Removal Report](#))

Update Product Details

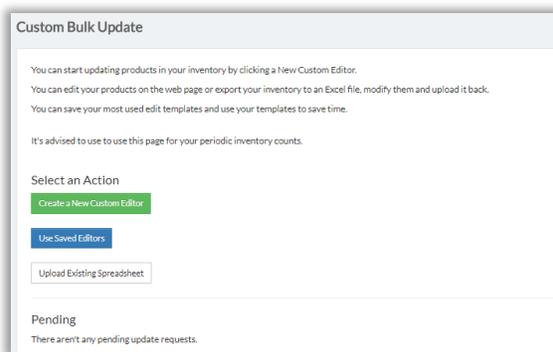
Update Multiple Products

Custom Bulk Update

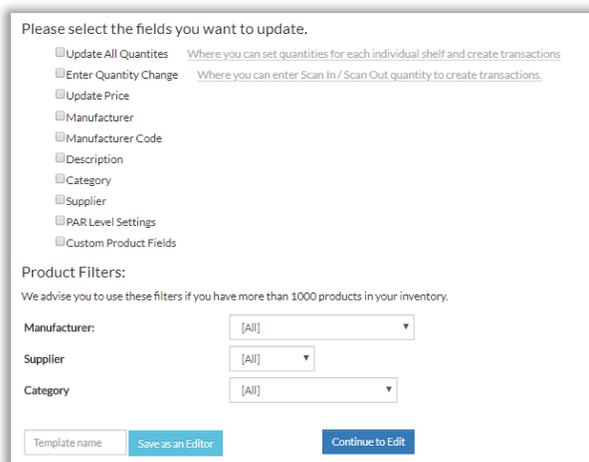
You can edit many items at once using Custom Bulk Update:

1. Go to Top Menu, click **Inventory Management**, then select **Custom Bulk Update**

Custom Bulk Update Screen appears



2. Click **Create a New Custom Editor**, and fields appear



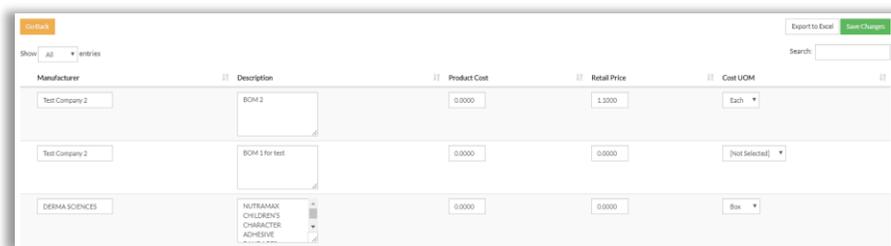
3. Check fields to update, then go down to Product Filters section and set filters

*Optional: To save these selections as a convenient template for future bulk updates, provide Template Name and click **Save as an Editor**. Template will only save selections on this screen.*

4. Click **Continue**

Live System Screen appears with the fields you selected

Important: This is the live system. Any changes saved here will actually change the system



5. Make changes, then click **Save Changes**

System gives Success message

Accept EDI Price Changes

Suppliers may notify ArbiMed of changes to their EDI order pricing. You can review these changes and decide whether the system should accept them

Note: To set up EDI Integration, please speak to your ArbiMed sales associate

To review and possibly accept EDI Price Changes:

1. Go to Top Menu, click **Inventory Management**, then **EDI Price Changes**

EDI Price Changes Screen appears with recent supplier price changes

2. Review the changes, and:

- If you want to accept them, check **Accept**, then click **Update My Prices**
- If you don't want to accept them, do nothing

Important: If you don't accept the changes, EDI orders for these products to that supplier will not be processed

Update PAR Levels

You can update PAR Levels for multiple products at once:

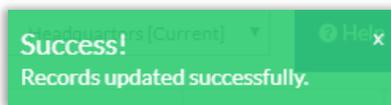
1. Go to Top Menu and click Settings, then PAR Levels
Update PAR Level Settings screen appears

Manufacturer	MF Code	Supplier	Description	Stock	Minimum Stock Level	Maximum Stock Level	Minimum Purchase Quantity	Exclude from PAR Level
ZM	5621	McKesson	TEGADERM™ TRANSPARENT DRESSING FIRST AID STYLE	0 Each	0 Box	0 Box	0 Box	<input type="checkbox"/>
A AND D HEALTHCARE	122123	McKesson	Bandage 3	3 Box	1 Box	4 Box	1 Box	<input type="checkbox"/>
A AND E MILLAND WELDING SUPPLY CO	8452	McKesson	Jan Test 1 product	1 Dose	0 Box	0 Box	0 Box	<input type="checkbox"/>
A AND G PHARMACEUTICALS	79ss	McKesson	Drug 56	1 Bottle	0 Bottle	0 Bottle	0 Bottle	<input type="checkbox"/>

2. Use search fields or scroll down to find products to update

3. Make desired updates, then click **Update All**

System gives Success message

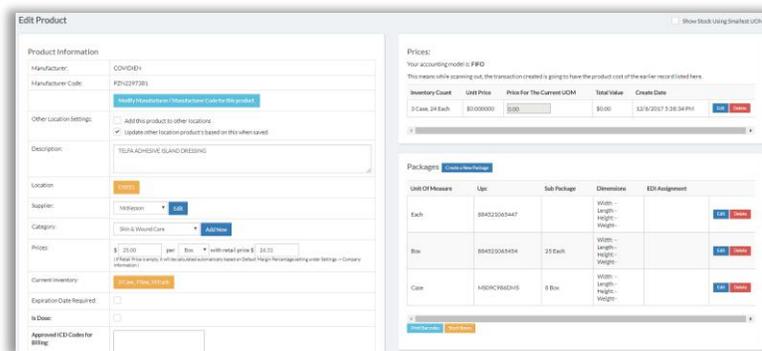


Update Single Product

Update Product Details: Overview

In general, you can update product details as follows:

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Find product and click 
Edit Product Screen appears



Inventory Count	Unit Price	Price for the Current UOM	Total Value	Create Date
3 Case, 24 Each	\$1000000	\$90	\$6,000	12/9/2017 3:38:34 PM

Unit Of Measure	Uom	Sub Package	Dimensions	EDI Assignment
Each	88432063447		Width: Length: Height: Weight:	EDI EDI
Box	88432063454	23 Each	Width: Length: Height: Weight:	EDI EDI
Case	11020000426	3 Box	Width: Length: Height: Weight:	EDI EDI

3. Edit product as needed, then click **Update Product**

Alternate Method:

You can also edit manually created products from the Created Products List:

- a. Go to Top Menu, click **Inventory Management**, then **Created Products**
Created Products List appears
- b. Find product and click **Edit**
- c. Edit product as needed, then click **Update Product**

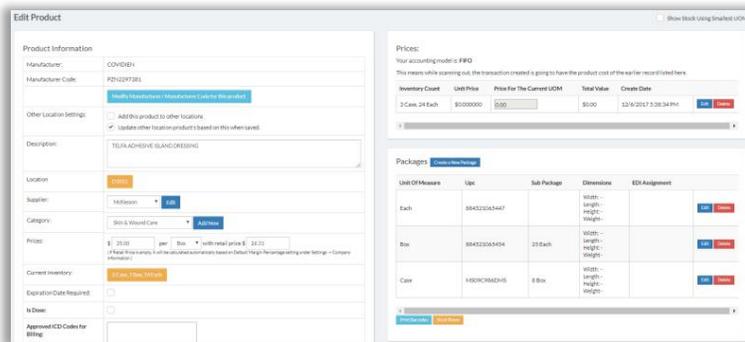
Update Purchase Price

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Locate item and click 

Alternate Method:

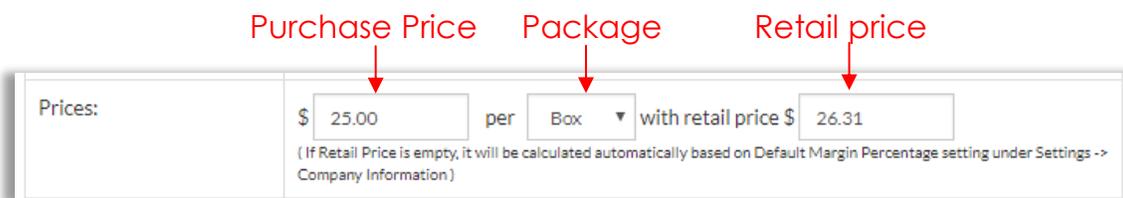
- a. Go to Top Menu and click **Inventory Management**, then **Created Products List**
- b. Find product and click 

Edit Product Screen appears



The screenshot shows the 'Edit Product' interface. On the left, there's a 'Product Information' section with fields for Manufacturer (CONDEN), Manufacturer Code (F21222782), Description (THERM ADHESIVE ISLANDCREATING), Location, Supplier, Category, Price (\$ 25.00 per Box), Current Inventory, and Expiration Date. On the right, there's a 'Prices' section with a table showing 'Inventory Cost', 'Unit Price', 'Price For The Current UCM', 'Total Value', and 'Create Date'. Below that is a 'Packages' table with columns for 'Unit Of Measure', 'Unit', 'Sub Package', 'Dimensions', and 'EDI Assignment'. The 'Prices' table has one row: '3 Case, 24 Each' with 'Unit Price' \$1000000, 'Price For The Current UCM' \$000, 'Total Value' \$300, and 'Create Date' 12/9/2017 7:38:34 PM.

3. Go to lower left to Prices row and note the fields:



The close-up shows the 'Prices' section with the following text: '\$ 25.00 per Box with retail price \$ 26.31'. Red arrows point from the labels 'Purchase Price', 'Package', and 'Retail price' to the respective input fields. Below the input fields, there is a note: '(If Retail Price is empty, it will be calculated automatically based on Default Margin Percentage setting under Settings -> Company Information)'.

- a. Update Purchase Price and Package as needed
 - b. Be sure also to update Retail Price
System will not automatically update unless field is blank
4. Click **Update Product**, and New pricing is saved

Under FIFO accounting, this means that:

- New units scanned in will be assigned the new price
- Old units scanned in with the old price will still scan out with the old price

Example:

You set price at \$1 per Each, and then go to Stock Room and scan in an Each
If you return to Edit Product screen, the Prices box will show:

Inventory Count	Unit Price	Price For The Current UOM	Total Value	Create Date		
1 Each	\$1.000000	1.00	\$1.00	12/6/2017 6:10:13 PM	Edit	Delete

Now suppose you change the price to \$2, and scan in another Each
Prices box will now show:

Inventory Count	Unit Price	Price For The Current UOM	Total Value	Create Date		
1 Each	\$1.000000	1.00	\$1.00	12/6/2017 6:10:13 PM	Edit	Delete
1 Each	\$2.000000	2.00	\$2.00	12/6/2017 6:16:32 PM	Edit	Delete

Only the second item is assigned the new price

Update Packages

1. Access Edit Product Screen:

- Go to Top Menu, click **Inventory Management**, then **Inventory List**
- Locate item and click 

Alternate Method:

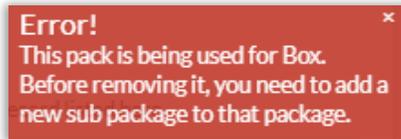
- Go to Top Menu and click **Inventory Management**, then **Created Products List**
- Find product and click 

Edit Product Screen appears

The screenshot shows the 'Edit Product' interface. On the left, the 'Product Information' section includes fields for Manufacturer (COVIDIEN), Manufacturer Code (PZI2297381), Other Location Settings, Description (TEFIA ADHESIVE ISLAND DRESSING), Location (Distro), Supplier (McKesson), Category (Skin & Wound Care), Prices (\$ 25.00 per Box), and Current Inventory (17000 - 7 New, 141 Job). On the right, the 'Prices' section shows a table with columns: Inventory Count, Unit Price, Price For The Current UOM, Total Value, and Create Date. Below this is the 'Packages' section with a table:

Unit Of Measure	Uqc	Sub Package	Dimensions	EDI Assignment
Each	884321065447		Width - Length - Height - Weight -	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Box	884321065404	25 Each	Width - Length - Height - Weight -	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Case	M529C1862H5	8 Box	Width - Length - Height - Weight -	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

2. To delete a package, go to Packages section, locate package, then click **Delete**
 - a. If you delete a package that is a sub unit of a greater package, system will give Error Message
 - b. For instance, in the graphic above, if you were to delete Each, system would say:



- c. This means you must specify a new sub package for Box
 - d. To do so, go to Box and click **Edit**, choose a new sub package, then click **Update**

3. To create a package, click **Create a New Package**
Popup appears

The screenshot shows the 'Create a New Package' popup form. It includes the following fields and controls:

- Unit Of Measure: [Not Set] (dropdown)
- Sub Package: [Not Set] (dropdown)
- Sub Package Quantity: [] (text input)
- Uqc: [] (text input) with a **Generate Barcode** button
- Length: [] (text input)
- Width: [] (text input)
- Height: [] (text input)
- Weight: [] (text input)
- Save** button (green)

- a. Select Unit of Measure
 - b. Select Sub Package (recommended)

Unit Of Measure:

Sub Package:

- [Not Set]
- Box
- Case
- Each

Sub Package Quantity:

Upc:

c. If you set Sub Package, you must also set Sub Package Count

Unit Of Measure:

Sub Package:

Sub Package Quantity:

d. Scan / type in UPC, or click **Generate Barcode**

e. If you wish, provide Dimensions and Weight

f. Click **Save**

System shows new package

Unit Of Measure	Upc	Sub Package
Each	884521065447	
Box	884521065454	25 Each
Case	MS09C986DMS	8 Box
Gross	MS38A2367MS	10 Case

4. When done updating packages, click **Save**

Create New Shelves

When you create a new product, the system will dispense a default Shelf as “-”. You can change this while creating the product, or you can do it now, as follows:

Important: In this process, Shelves are referred to as “Locations,” but elsewhere in the system “Location” refers to the physical business address where you are receiving and/or dispensing products (see [Set Company Information](#), Step 3)

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Go to Search field, type product name, and press Enter
(Use other query fields as needed)

Screen shows product

Mf. Code	Manufacturer	Cost	Cost UOM	Description	Supplier	In Stock
asdfjil	AB7 INDUSTRIES	\$5.00	Bottle	DS Drug	HBOC	1 Bottle

3. Go to column In Stock and click square showing in-stock units:

1 Bottle

Popup appears

Product: Manufacturer: AB7 INDUSTRIES - Manufacturer Code: asdfjil
Description: DS Drug
Hide Doses Without Quantity
Lot Number:
Expiration Date: Begin Date End Date

Type	Location	Expiration Date	For Used Items	Total Quantity	Supplier	Unit Cost	
• Shelf	-		No	1 Bottle	HBOC	5.0000	<input type="button" value="Add Lot"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

In column Location, screen shows existing default shelf “-”

Type	Location
• Shelf	-

4. Click **Add New Location**

New Inventory Location popup appears

Product: Manufacturer: AB7 INDUSTRIES - Manufacturer Code: asdfjl
Description: DS Drug
Shelf Location:
Used:
Inventory Count: 0 [Not Set]

5. Complete fields:

- Shelf Location – Name the new shelf
- Inventory Count
- Inventory Count Package (the drop down menu) - Required

6. Click **Create**

Inventory Locations screen appears displaying the new shelf

Type	Location	Expiration Date	For Used Items	Total Quantity
• Shelf	-		No	0 Dose
Type	Location	Expiration Date	For Used Items	Total Quantity
• Shelf	Cabinet 1		No	0 Dose

Create New Lots

You can create lots as subdivisions for any shelf

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Go to Search field, type product name, and press Enter
(Use other query fields as needed)

Screen shows product

Mf. Code	Manufacturer	Cost	Cost UOM	Description	Supplier	In Stock
asdfjl	AB7 INDUSTRIES	\$5.00	Bottle	DS Drug	HBOC	1 Bottle

3. Go to column In Stock and click square showing in-stock units:

1 Bottle

Popup appears

Product: Manufacturer: AB7 INDUSTRIES - Manufacturer Code: asdfij
Description: DS Drug
Hide Doses Without Quantity:
Lot Number:
Expiration Date: Begin Date: End Date: Filter

Add new Location

Type	Location	Expiration Date	For Used Items	Total Quantity	Supplier	Unit Cost	
• Shelf	-		No	1 Bottle	HBOC	5.0000	<input type="button" value="Add Lot"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

4. Scroll down and find desired shelf

5. Click **Add Lot** and complete the fields

For Lot Number, you can set an expiration date

6. Click **Create**

Screen shows Shelf with the new Lot

Type	Location	Expiration Date	For Used Items	Total Quantity
• Shelf	Cabinet 1		No	0 Dose
↳ (Lot)	1	12/23/2017	No	0 Dose

Update PAR Levels

From time to time you may want to update PAR Levels to better reflect product usage trends in your practice or facility

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**

2. Locate product and click 

Edit Product screen appears

3. Go to lower left to PAR Level box

4. Complete fields as desired:

- Exclude from PAR Level – Check this box if you do not want PAR Level to apply to this product
- Minimum Stock Level – will be PAR Level Report's Suggested Purchase Quantity, if it is greater than future sales estimate
- Maximum Stock Level – will be PAR Level Report's Suggested Purchase Quantity, if it is less than future sales estimate
- Minimum Purchase Quantity – Set this to supplier minimum quantity, to ensure PAR Level Report's Suggested Purchase Quantity matches

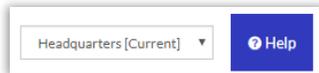
5. Go to right and click **Update Product**

View Reports and Data

Reports Overview

Various reports are available. Many have the same data viewing features:

- To change location, go to upper right and use drop-down menu:



- Click arrows icons to sort fields:



- Click  to view more details , click  to close
- Click  to edit details
- Button menu:



- **Copy** means system will copy the entire report table, which you can then paste where you choose
- **CSV** means system will create a Comma Separated Value file, which will download automatically to your computer
- **Show/Hide Columns** lets you hide or show selected columns from the report. These settings will be preserved even if you close the browser

Dose-Related Reports

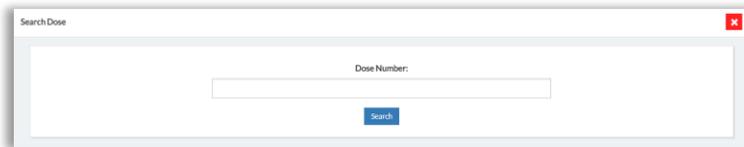
Search Dose

If your system build has Dose Tracking, this report lets you query and view information for tracked doses

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

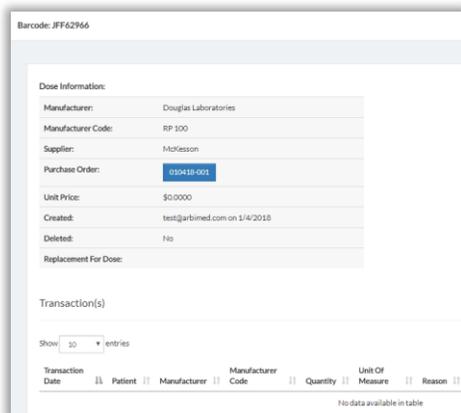
1. Go to Top Menu, click **Inventory Management**, then **Search Dose**

Popup appears



2. Provide Dose Number, then click **Search**

System provides dose details



Dose Information:	
Manufacturer:	Douglas Laboratories
Manufacturer Code:	RP 100
Supplier:	McKesson
Purchase Order:	010418-001
Unit Price:	\$0.0000
Created:	test@arbiMed.com on 1/4/2018
Deleted:	No
Replacement For Dose:	

Transaction(s)

Show 10 entries

Transaction Date	Patient	Manufacturer	Manufacturer Code	Quantity	Unit Of Measure	Reason
No data available in table						

3. Go to Purchase Order row and click box

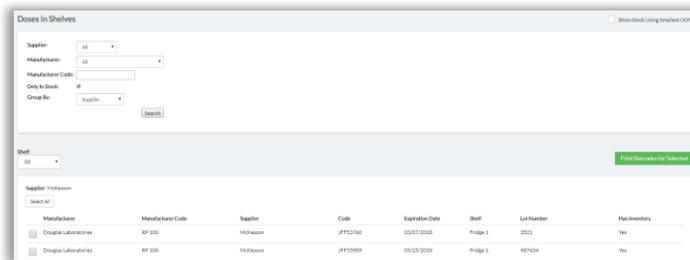
System will show original purchase order, and from there you can print Dose Barcodes; process is same as with Dose Transactions Report (see Dose Transactions: [Print Barcodes for Tracked Doses](#))

Doses In Shelves

If your system build supports Dose Tracking, this report lets you view and print Dose Barcodes

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Top Menu, click **Inventory Management**, then **Doses in Shelves** Report screen appears



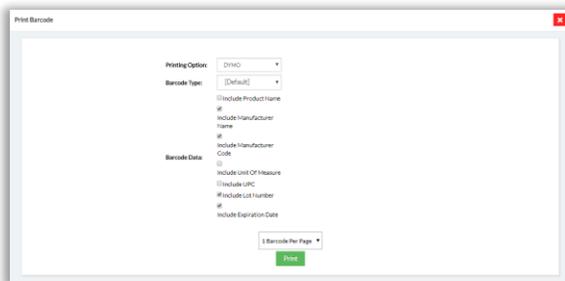
2. Populate search fields, including Shelf, then click **Search**
System shows results

Manufacturer	Manufacturer Code	Supplier	Code
<input type="checkbox"/> Douglas Laboratories	RP 100	McKesson	JFF53760

The column Code is the Dose Number

3. Check the box for the dose(s) to print, then go to right and click **Print Barcodes for Selected**

Print popup appears



4. Set / check fields as desired, then click **Print**
5. Browser downloads barcode pdf, which you can print

Current Dose Inventory

If your system build has Dose Tracking, this report shows quantities of tracked doses in your Inventory

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Top Menu and click **Reports**, then **Current Dose Inventory**

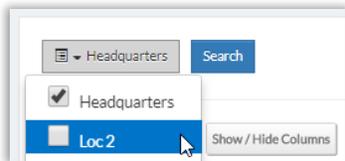
Report screen appears



Service Location	Inventory Site	Item Name	Reorder	Purchased	Sample	Specialty
Headquarters	-	BD BBL™ Vitamin K	0	1	0	0
Headquarters	-	Melatonin 1 mg	0	14	3	2
Headquarters	-	Embrace PRO	0	4	0	0
Headquarters	-	Cotton Tipped Applicators	0	2998	0	0
Headquarters	-	Drug123	0	3	0	0
Headquarters	1	Drug123	0	2	0	0

- Service Location = Physical address where you receive and dispense items
- Inventory Site = Shelf

2. Use drop-down menu to change Service Location if needed



3. Go to right to Search box and type Item Name, Service Location, or Inventory site
Screen will automatically show search results

Dose Transactions

If your system build supports Dose Tracking, this report shows dose transaction history, and also allows you to Undispense doses and print dose barcodes

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Undispense Doses

1. Go to Top Menu and click **Reports**, then **Dose Transactions**
Report screen appears

Dose Transactions

Start Date: 12/18/2017
End Date: 01/08/2018
Eye: All
Doctor: All
PO Number:
Manufacturer Code:
Dose: #F55190
HCD:
User: All
Is Unassigned: Not Unassigned
Search

2. Populate search fields, then click **Search**
Matching transaction(s) appear

Treatment Date	Patient Name	Patient ID	Manufacturer	Manufacturer Code	Product Name	Dose	Lot	Expiration Date	Purchase Order	Purchase Order Type	Eye Treated	Diagnoses Treated For	Doctor	Location	Is Unassigned
1/9/2018 11:28:56 AM	Bob Smith		ABBOTT	34342e	Drug123	6261371	Dose 1		010918-004	Sample Order	Right	H30.001 - Unspecified focal chorionretinal inflammation, right eye		Headquarters	No
1/8/2018 10:32:53 AM	Jeff Jones	96354	Douglas Laboratories	8P 100	Melatonin 1 mg	#F52360	3521	3/7/2018	120417-005	Purchase Order	Right	C69.31 - Malignant neoplasm of right choroid	Dr. David Smith	Headquarters	No

3. Go to column Is Unassigned and click "No" box
Popup appears

Assignment Information

Patient: Bob Smith
Manufacturer: ABBOTT
Manufacturer Code: 34342e
Lot Number: Dose 1
Expiration Date: -
Purchase Order: 010918-004
Quantity: 1 Dose
Assignment Date: 1/9/2018 11:28:56 AM

Patient's Other Transactions

Show 10 entries Search:

Id	Type	Date	Total
#572563	Transaction	01/08/2018	(\$1.00)
#572348	Transaction	01/08/2018	(\$1.00)
#572349	Transaction	01/08/2018	\$1.00

Showing 1 to 3 of 3 entries Previous 1 Next

4. Scroll down and click **Unassign Dose & Scan Back In**, then **Ok**
System gives Success message

Print Barcodes for Tracked Doses

1. Go to Top Menu and click **Reports**, then **Dose Transactions**
Report screen appears



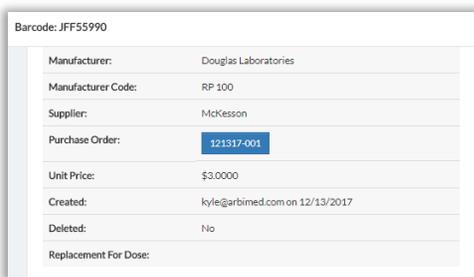
2. Populate search fields, then click **Search**
Matching transaction(s) appear

Treatment Date	Patient Name	Patient ID	Manufacturer	Manufacturer Code	Product Name	Dose
12/28/2017 10:09:58 AM	Jeff Jones	96354	Douglas Laboratories	RP 100	Melatonin 1 mg	JFF55990

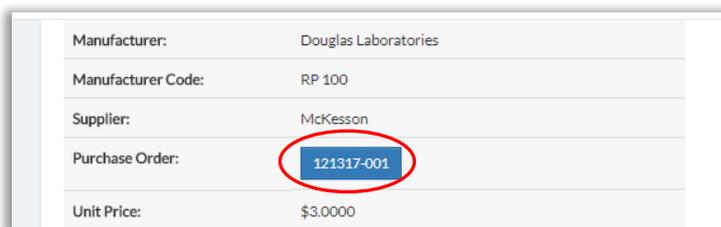
3. Go to column Dose and click box containing Dose Number

JFF55990

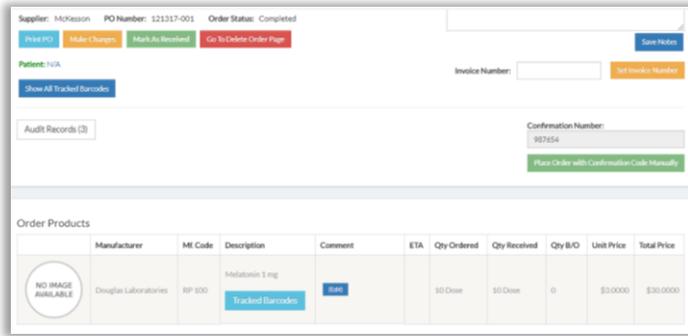
Dose Info Popup appears



4. In grey table at top, go to row **Purchase Order** and click box showing the order number



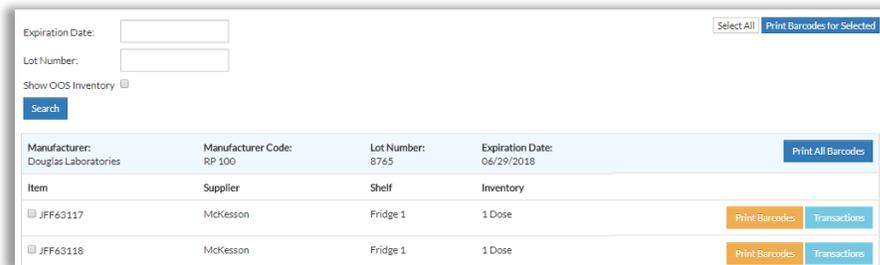
Order details appear



5. Locate tracked dose product and click **Tracked Barcodes**

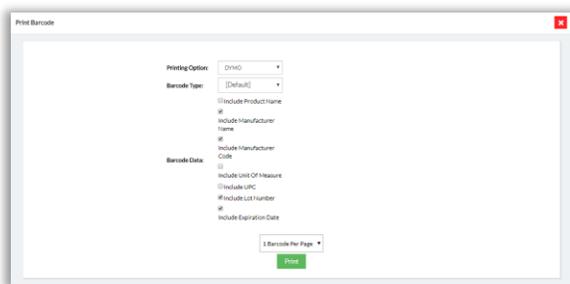


Popup appears with Dose Numbers



6. Check the boxes for the doses to print, then go to upper right and click **Print Barcodes for Selected**

Print popup appears



7. Check or uncheck fields as desired, then click **Print**

8. Browser downloads barcode pdf, which you can print

Dose Removal Report

If your system build has Dose Tracking, this report shows removed doses, and also allows you to edit and cancel the Removal. For more information on Dose Removal, see [Remove Doses](#))

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Top Menu and click **Reports**, then **Dose Removal Report** Report appears

Location Name	Manufacturer	Manufacturer Code	Product Name	Dose Number	Dose Type	Purchase Order	Transaction	Barcode	Date Removed	Removed By
Headquarters	Douglas Laboratories	RP 100	Melatonin 1 mg	JFF6796	Sample Order	010418-001	571375	MS1D2274FMS	1/4/2018 10:07:32 PM	
Headquarters	Douglas Laboratories	RP 100	Melatonin 1 mg	JFF6797	-		571373	MS1D2274FMS	1/4/2018 10:07:18 PM	

2. Populate search fields, then click **Search**
System returns search results

Location Name	Manufacturer	Manufacturer Code	Product Name	Dose Number	Dose Type	Purchase Order	Transaction	Barcode	Date Removed
Headquarters	Douglas Laboratories	RP 100	Melatonin 1 mg	JFF57979	Purchase Order	122017-011	567071	MS1D2274FMS	1/10/2018 5:16:30 PM

3. To view dose's transaction history, go to Dose Number column and click box
4. To view dose's original order, go to Purchase Order column and click box
5. To Unremove a dose, go to right and click **Edit**
Popup appears

Edit Dose Removal

Dose Number:

Reason: Damaged

Comment:

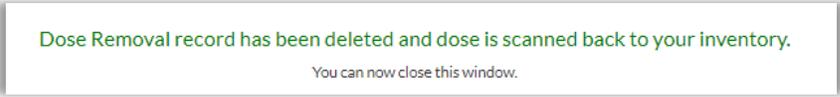
User:

Date:

Scan Dose Back In

6. Review information, then click **Scan Dose Back In**

System gives Success message



Dose is now returned to available Inventory

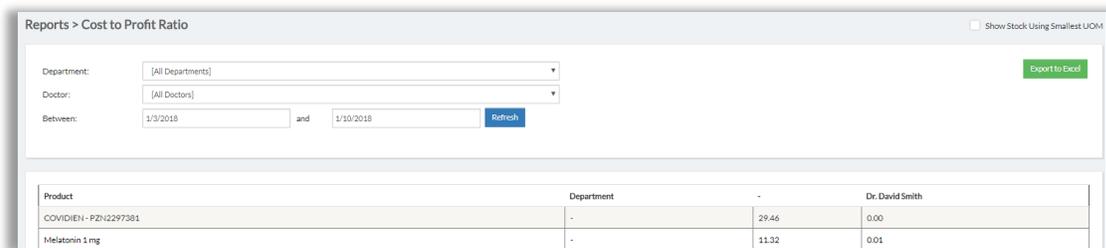
7. Close popup, then refresh screen

Cost, Quantity, and Profit Reports

Cost to Profit Ratio

1. Go to Top Menu and click **Reports**, then **Cost to Profit Ratio**

Report screen appears



Reports > Cost to Profit Ratio Show Stock Using Smallest UOM

Department: [All Departments]

Doctor: [All Doctors]

Between: 1/3/2018 and 1/10/2018

Product	Department	-	Dr. David Smith
COVIDIEN-P2N12297381	-	29.46	0.00
Melatonin 1 mg	-	11.32	0.01

2. Data is for default search field settings:

- All Departments
- All Doctors
- Start Date one week before current date

3. Set fields as desired, then click **Refresh**

Product Cost Total By Doctor

1. Go to Top Menu and click **Reports**, then **Product Cost Total By Doctor**
Report screen appears

Product	Department		Dr. David Smith
COVIDIEN - PZH2297381	-	(\$175.00)	\$0.00
Melatonin 1 mg	-	(\$3,300.00)	\$3.00

2. Data is for default search field settings:
 - All Departments
 - All Doctors
 - Start Date one week before current date
3. Set fields as desired, then click **Refresh**

Product Cost By Supplier

1. Go to Top Menu and click **Reports**, then **Product Cost By Supplier**
Report screen appears

Total	HBOC	McKesson	Total
COVIDIEN - PZH2297381	\$0.0000	\$175.0000	\$175.0000
Melatonin 1 mg	\$0.0000	\$3297.0000	\$3297.0000

2. Data is for default Start Date one week before current date
3. Set Start Date as desired, then click **Refresh**

Profit By Doctor

1. Go to Top Menu and click **Reports**, then **Profit By Doctor**

Report screen appears

Product	Department		Dr. David Smith
COVIDIEN - PZI (2297381)	-	(\$9.17)	\$0.00
Melatonin 1 mg	-	\$188.10	\$342.00

2. Data is for default search field settings:

- All Departments
- All Doctors
- Start Date one week before current date

3. Set fields as desired, then click **Refresh**

Profit By Supplier

1. Go to Top Menu and click **Reports**, then **Profit By Supplier**

Report screen appears

Total		HBOC	McKesson	Total
COVIDIEN - PZI (2297381)	\$0.0000	\$0.0000	\$-9.1700	\$-9.1700
Melatonin 1 mg	\$0.0000	\$0.0000	\$530.1000	\$530.1000
AB7 INDUSTRIES - addf()	\$0.0000	\$0.7500	\$0.0000	\$0.7500
AB7 INDUSTRIES - 8883	\$0.0000	\$0.0000	\$-2.0000	\$-2.0000

2. Data is for default Start Date one week before current date

3. Set Start Date as desired, then click **Refresh**

Quantity By Doctor

1. Go to Top Menu and click **Reports**, then **Quantity By Doctor**
Report screen appears

Product	Unit	Dr. David Smith	Total
Lot Test Bandages	0 Box	0 Box	0 Box
Drug123	0 Dose	0 Dose	0 Dose

2. Data is for default search field settings:
 - All Departments
 - All Doctors
 - Start Date one week before current date
3. Set fields as desired, then click **Refresh**

Quantity By Supplier

1. Go to Top Menu and click **Reports**, then **Quantity By Supplier**
Report screen appears

Product	Unit	Supplier	Total
COVIDIEN - P212297381	0 Each	HBIOC	7 Box
Melatonin 3 mg	0 Dose	McKesson	10 Dose
ABT INDUSTRIES - 449FJ	0 Bottle		1 Bottle
ABT INDUSTRIES - 8883	0 Dose		1 Dose
OMNISEALTH - NDC 14030-0020-40	0 Box		2 Box

2. Data is for default Start Date one week before current date
3. Set Start Date as desired, then click **Refresh**

Other Reports

Transaction History

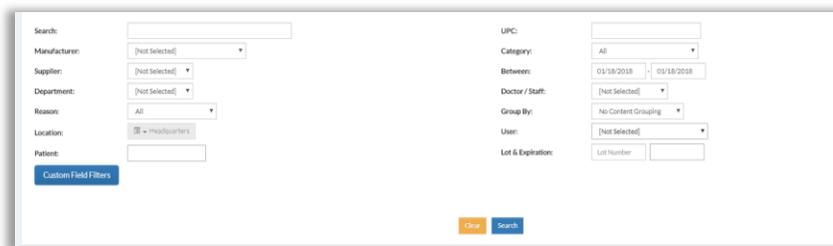
This report shows Scan In or Out activity, and also you to Undispense items. It also allows you to Undispense and remove doses, if your system build has Dose Tracking

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Search for Transactions

1. Go to Top Menu and click **Reports**, then **Transaction History**

Report screen appears



2. Populate Search box with product name, dose number or manufacturer code; or populate other search fields as desired

3. Click **Search**

System displays transactions

Manufacturer	MT Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	\$0.0000	\$1.0524	-1 Box	2 Case, 6 Box, 1 Each	\$0.0000	(\$26.3100)	02/23/2018
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	\$1.0000	\$1.0524	1 Box	2 Case, 7 Box, 1 Each	\$25.0000	\$26.3100	02/23/2018

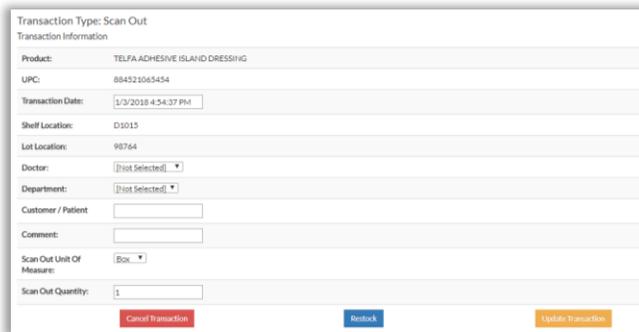
- Red means "Scanned Out"
- Green means "Scanned In"
- To view record details, click 

Undispense Non-Dose Item

1. Search for transactions (see above), locate transaction you want, then click  to open the row

2. Click 

Popup appears



Transaction Type: Scan Out
Transaction Information

Product:	TELFA ADHESIVE ISLAND DRESSING
UPC:	884521065454
Transaction Date:	1/3/2018 4:54:37 PM
Shelf Location:	D1015
Lot Location:	98764
Doctor:	[Not Selected]
Department:	[Not Selected]
Customer / Patient:	
Comment:	
Scan Out Unit Of Measure:	Box
Scan Out Quantity:	1

3. Click **Cancel Transaction**, then **Ok**

System gives Success message

4. Close popup

Undispense Dose

1. Search for Transactions (see above), locate transaction you want, then click  to open the row

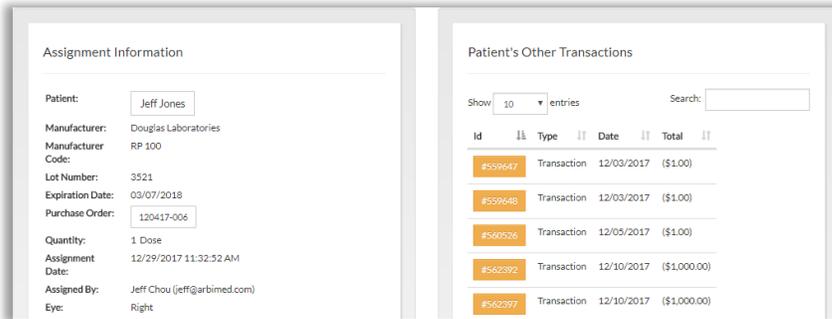
Screen shows:



Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
 Douglas Laboratories	RP 100	Melatonin 1 mg	\$3.0000	\$3.4500	-1 Dose	14 Dose	(\$3.0000)	(\$3.4500)	03/07/2018	JFF53760 Shelf: - Lot: 3521	12/29/2017 11:32:52 AM

2. Click **Unassign Dose**

Popup appears



3. Scroll down and provide Comments (required)

4. Click **Undispense Dose and Scan Back In**, then **Ok**

System gives Success message

5. Close popup, and screen refreshes and shows a green row for the dose, indicating "Scan In" (i.e. dose now returned to Inventory)

Manufacturer	Mf.Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
Douglas Laboratories	RP 100	Melatonin 1 mg	\$3.0000	\$3.4500	1 Dose	17 Dose	\$3.0000	\$3.4500	03/07/2018	JFF53760 Shelf: - Lot: 3521	1/3/2018 5:10:28 PM
Douglas Laboratories	RP 100	Melatonin 1 mg	\$3.0000	\$3.4500	-1 Dose	14 Dose	(\$3.0000)	(\$3.4500)	03/07/2018	JFF53760 Shelf: - Lot: 3521	12/29/2017 11:32:52 AM

The red row still exists as a record of the Dispense (note date and time on the right)

Remove Dose

“Remove” refers to deleting from the Inventory a tracked dose that is damaged, expired or otherwise not fit for use.

Important: Remove is not the same Scan Out, in which the dose is dispensed to a recipient

You can remove a dose and create an order for its replacement at the same time. Removed doses can be viewed on Dose Removal Report (see [Dose Removal Report](#))

To Remove a Dose:

1. Go to Top Menu and click **Reports**, then **Transaction History**
2. Click in Search field and scan or type in dose tracking number, then press Enter
System displays dose record

Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
Douglas Laboratories	RP 100	Melatonin 1 mg	\$3.0000	\$3.4500	1 Dose	12 Dose	\$3.0000	\$3.4500	03/07/2018	JFF53756 Shelf: - Lot: 3521	12/4/2017 4:40:32 PM

3. Click  to open the row, then click **Remove Dose**
Popup appears

Manufacturer: Douglas Laboratories
Manufacturer Code: RP 100
Lot Number: 987654
Expiration Date: 05/25/2018
Purchase Order: 121317-001
Quantity: 1 Dose

Remove Reason:

Eligible for Replacement

4. Select Remove Reason

5. Choose one:

- Option 1: Remove Dose without ordering replacement
- Option 2: Remove Dose and order replacement (see further below)

Option 1: Remove Dose Without Ordering Replacement

1. Provide Comments (required)
2. Click **Remove Dose**, then **Ok**
3. System gives Success message. Close popup, and Transaction History screen refreshes
4. If you wish to undo the removal, go to Dose Removal Report and follow the Unremove process there (see Dose Removal Report)

Option 2: Remove Dose and Order Replacement

1. Click the box next to **Eligible for Replacement**

Option boxes appear



Eligible for Replacement
 Attach to Existing Open Orders Create a New Order

2. Choose one:

- Method 1: Attach to Existing Open Order
- Method 2: Create a New Order

Method 1: Attach to Existing Open Order

- a. Click **Attach to Existing Open Order**
- b. Click circle for order to attach to



Eligible for Replacement
 Attach to Existing Open Orders
 121417-001 [1] [McKesson]
 122717-003 [1] [McKesson]
 011018-001 [McKesson]

- c. Provide Comments (required)
- d. Click **Remove Dose & Attach to PO**, then **Ok**
Dose is now removed from available Inventory

Important: If you now cancel the purchase order, the dose is still removed from Inventory

- e. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



- f. Click **Place Order With Confirmation Code Manually** (or click **Send PO to ___ for approval**, if order is Purchase Order)
- g. If you wish to undo the removal, go to Dose Removal Report and follow the Unremove process there (see [Dose Removal Report](#))

Method 2: Create a New Order

- a. Click **Create a New Order**

Order fields appear

- b. Set/populate fields:
 - o Supplier (required)
 - o Type – default is Replacement Order. Change if desired
 - o Patient
 - o Comments (required)

- c. Click **Remove Dose & Attach to PO**, then **Ok**
Dose is now removed from available Inventory

Important: If you now cancel the purchase order, the dose is still removed from Inventory

- d. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



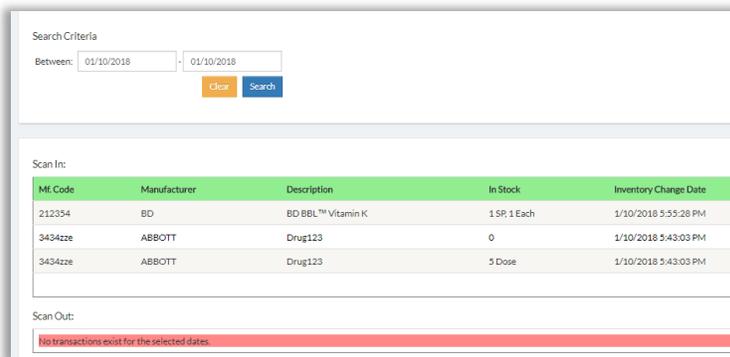
- e. Click **Place Order With Confirmation Code Manually** (or click **Send PO to ___ for approval**, if order is Purchase Order)

- f. If you wish to undo the removal, go to Dose Removal Report and follow the Unremove process there (see [Dose Removal Report](#))

Inventory History

This report shows basic inventory change history, and allows date-range searching

1. Go to Top Menu and click **Reports**, then **Inventory History**
Report screen appears



MI Code	Manufacturer	Description	In Stock	Inventory Change Date
212354	BD	BD BBL™ Vitamin K	1 SR, 1 Each	1/10/2018 5:55:28 PM
3434zze	ABBOTT	Drug123	0	1/10/2018 5:43:03 PM
3434zze	ABBOTT	Drug123	3 Dose	1/10/2018 5:43:03 PM

As elsewhere, green indicates "Scan In," and red indicates "Scan Out"

2. Set date range to search, then click **Search**

System returns results

Mf. Code	Manufacturer	Description	In Stock	Inventory Change Date	Inventory Change Amount	Price
212354	BD	BD BBL™ Vitamin K	1 SR, 1 Each	1/10/2018 5:55:28 PM	1 SP	\$100.00
3434zze	ABBOTT	Drug123	0	1/10/2018 5:43:03 PM	9 Dose	\$2,097.00
3434zze	ABBOTT	Drug123	5 Dose	1/10/2018 5:43:03 PM	9 Dose	\$90.00
RP 100	Douglas Laboratories	Melatonin 1 mg	18 Dose	1/9/2018 8:55:59 PM	16 Dose	\$4,800.00
32	Test Company 2	BOM 1	2 Each	1/9/2018 8:21:04 PM	2 Each	\$0.00

Items in purple have no price

Top Consumed Items

This report shows average consumption, current stock and current stock values for products in Inventory. Average consumption can be calculated Daily, Weekly, Monthly and Yearly.

1. Go to Top Menu and click **Reports**, then **Top Consumed Items**

Report screen appears

Manufacturer	Mf. Code	Description	Avg. Cons.	Current Stock	Current Stock Value	
DYNAREX CORPORATION	4301	Cotton Tipped Applicators	1 Pouch, 15 Each	2 Box, 9 Pouch, 98 Each	\$2,020.59	Product Details
COVIDIEN	P2H297381	TEFLA ADHESIVE BLAND DRESSING	2 Each	3 Case, 5 Box, 24 Each	\$751.00	Product Details

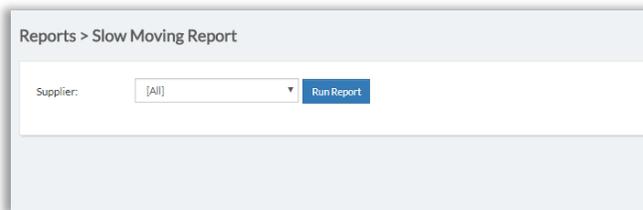
2. Set search fields, then click **Search**
3. To edit item details:
 - a. Go to right and click **Product Details**
 - b. Make changes and click **Update Product**

Slow Moving Report

This report shows in-stock products that are slow to be Dispensed or Reserved

1. Go to Top Menu and click **Reports**, then **Slow Moving Report**

Report screen appears



2. Select Supplier, then click **Run Report**

Data appears

MI Code	Description	Current Stock Level	Open PO Quantity	Open SO Quantity	Quantity Available	Daily Avg.Sales	Restocking UOM
McKesson							
212354	BD BBL™ Vitamin K	1 SP, 9 Each	0	0 Each	1 SP, 9 Each	0 Each	Each
24sk	XT Bandages	5 Each	0	0 Each	5 Each	0 Each	Box
3434zze	Drug123	6 Dose	0	0 Dose	6 Dose	0 Dose	Dose
4301	Cotton Tipped Applicators	4 Box	0	0 Each	4 Box	0 Each	Box
828181	Easy-Touch Safety Lancets	5 Box, 1 Each	0	0 Each	5 Box, 1 Each	0 Each	Box

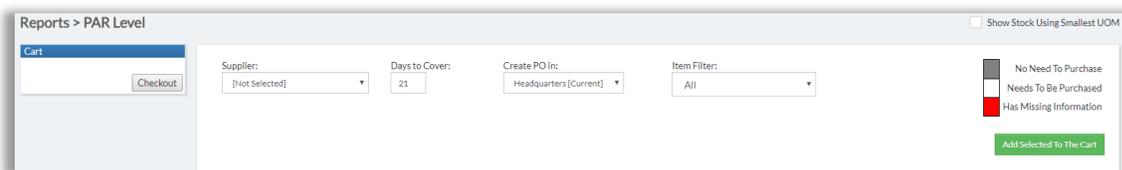
3. To view data for another supplier, select their name and click **Run Report**

PAR Levels Report

This report calculates real-time estimated item usage and estimated future usage, then tells you how much to order. The report also lets you order items.

1. Go to Top Menu and click Reports, then **PAR Levels Report**

Report screen appears



2. Select Supplier

System displays items



- Grey = No Need to Purchase
- White = Needs to be Purchased
- Red = Missing Information
 - Click **Expand** to review, then go to Inventory List and edit product

3. If you wish, set Item Filter to the color code you want to see

Order Items

The PAR Levels Report also lets you order items

To order items, choose one:

- Option 1: Add Multiple Items to Order
- Option 2: Add Single Item to Order

Option 1: Add Multiple Items to Order

1. White rows are already checked; uncheck if desired
2. To add additional items, check the box for the item you wish to add. For example:



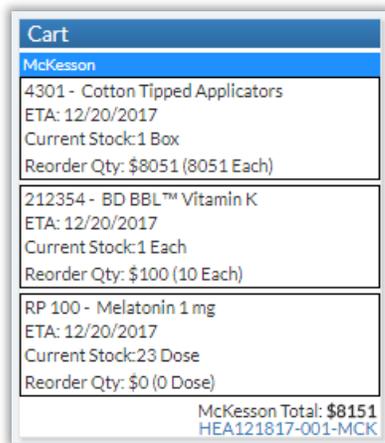
3. Click **Add Selected to the Cart**

All checked items are added to Cart (upper left)

4. Add other items as needed. If desired, search other suppliers

5. Click **Checkout**, then **Ok**

Cart appears showing item(s) with Order Number



← Order Number

If ordering from multiple suppliers, system will create a different order for each one

6. If you ordered Grey items, they will not have quantities

To add quantities:

- Go to Top Menu, click **Procurement**, then **Purchase Orders**
- Locate the order, open it, and provide the quantities
- Place order

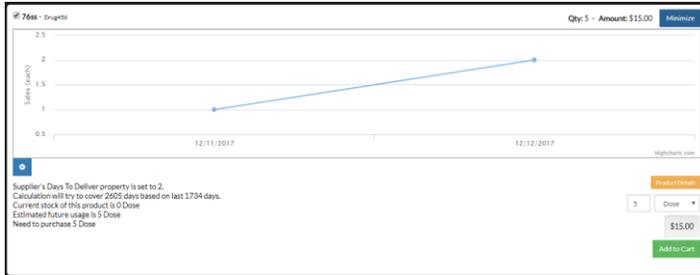
Option 2: Add Single Item to Order

You can order white row and grey row items

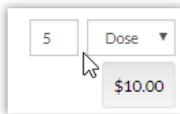
Order White Row Item

1. Locate item to order and click **Expand**

Item detail appears

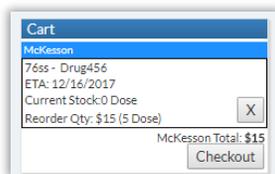


2. Go to lower right and adjust quantity and package if necessary



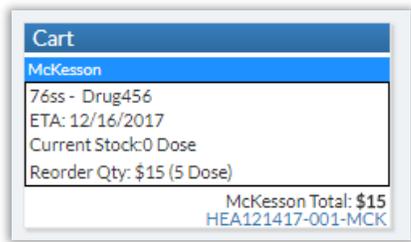
3. Click **Add to Cart**

Item appears in Cart at upper left



4. Add other items as desired
5. When ready, click **Checkout**, then **Ok**

Cart appears showing item(s) with Order Number



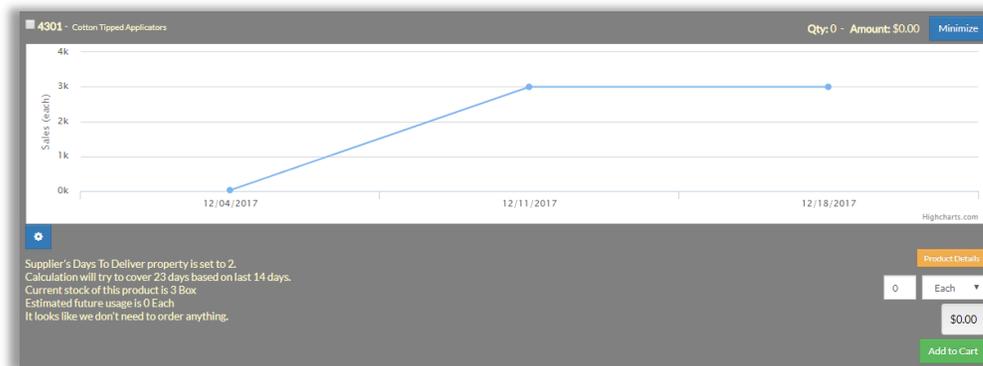
← Order Number

If ordering from multiple suppliers, system will create a different order for each one

Order Grey Row Item

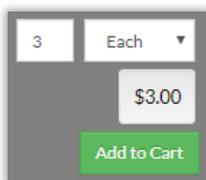
1. Locate item to order and click **Expand**

Item detail appears



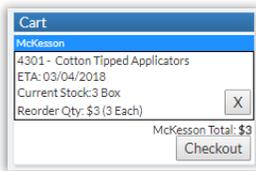
2. Select package; then click in quantity box and enter desired amount, and press Enter

System calculates total quantity cost



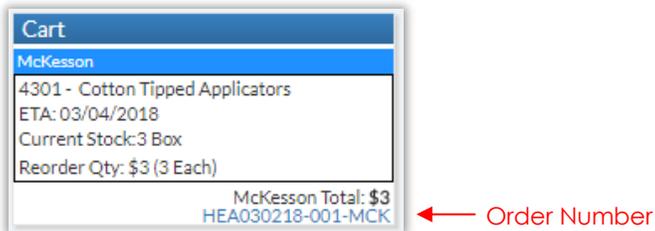
3. Click **Add to Cart**

Item appears in Cart at upper left



4. Add other items as desired
5. When ready, click **Checkout**, then **Ok**

Cart appears showing item(s) with Order Number

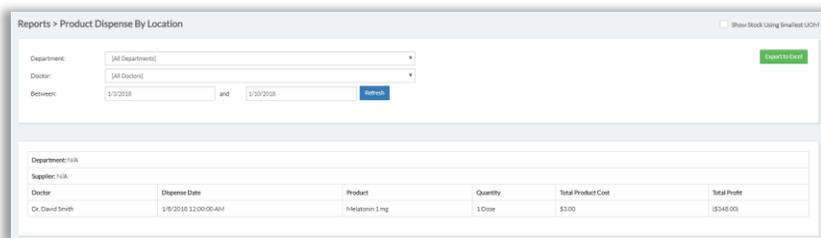


If ordering from multiple suppliers, system will create a different order for each one

Product Dispense By Location

1. Go to Top Menu and click **Reports**, then **Product Dispense By Location**

Report screen appears



2. Data is for default search field settings:
 - All Departments
 - All Doctors
 - Start Date one week before current date
3. Set fields as desired, then click **Refresh**

Patient Transactions

1. Go to Top Menu and click **Reports**, then **Patient Transactions**
Report screen appears

Customer / Patient	Comment	Doctor	Department	Category	Manufacturer	MC Code	Description	Shelf	Lot	Expiration Date	Quantity	Transaction Date
Jeff Jones		Dr. David Smith	N/A	Drugs	Douglas Laboratories	BP 100	Melatonin 1 mg	Fridge 1		3/7/2018 12:00:00 AM	1 Dose	1/8/2018 10:32:53 AM

2. Data is for default search field settings:
 - All Departments
 - All Doctors
 - All Categories
 - Start Date one week before current date
3. Set fields as desired, then click **Refresh**
4. To search on custom fields, click **Custom Field Filters**, populate fields, then click **Refresh**
(For more information on custom fields, please see [Create Custom Fields](#))

Gross Sales By Item

1. Go to Top Menu and click **Reports**, then **Gross Sales By Item**

Report screen appears, displaying data for current date

Description	Manufacturer	Manufacturer Code	Units Sold	Dollar Value	Retail Value
Drug456	A-AND G PHARMACEUTICALS	7660	3 Dose	3,000,000	10,330,000
D5 Drug	AB7 INDUSTRIES	asdfj	3 Bottle	15,000,000	17,230,000

2. Set fields as desired, then click **Refresh**

Point of Sale COGS

This report shows product wholesale and retail pricing for Point of Sale ("Walk-In") customer sales (see [Dispense to Walk-In Customers](#))

1. Go to Top Menu and click **Reports**, then **Point of Sale COGS**

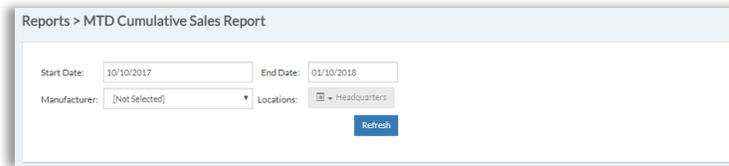
Report screen appears, displaying data for current date

Order Id	Create Date	Manufacturer	Manufacturer Code	Product Description	UPC	Quantity	Unit Of Measure	Is Scanned Out	Total Cost	Retail Price	Customer Name	Customer Address	Order Notes
122607	1/5/2018 1:42:17 PM	AB7 INDUSTRIES	8883	Vitamin D2	MSBCC7FAH4S	1	Dose	Yes	\$2.00	\$2.30			
122607	1/5/2018 1:42:17 PM	AB7 INDUSTRIES	asdfj	D5 Drug	MSF2BA1A4H5	1	Bottle	Yes	\$3.00	\$3.75			

2. Set fields as desired, then click **Refresh**

MTD Cumulative Sales Report

1. Go to Top Menu and click **Reports**, then **MTD Cumulative Sales Report**
Report screen appears

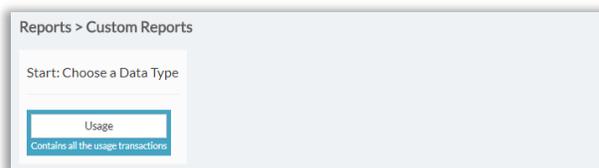


2. Set fields as desired, then click **Refresh**

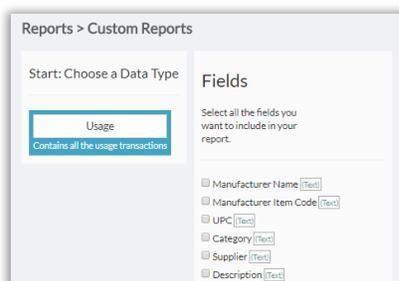
Custom Reports

You can build custom reports to view specific data as desired

1. Go to Top Menu and click **Reports**, then **Custom Reports**
Custom Report Screen appears



2. Click **Usage**
Fields appear



3. Check the boxes for desired Fields

4. Scroll down and click **Next > Filters**

Filters and other options appear

The screenshot shows a configuration panel with three sections: 'Filters', 'Group By', and 'Settings'. The 'Filters' section contains a list of fields with checkboxes: Manufacturer Name, Manufacturer Item Code, Text Search, UPC, Category, Supplier, Expiration Date, Shelf Location, Lot, Inventory Change Date, Department, Location, Staff, Reason, Changed By, and Customer. The 'Group By' section contains checkboxes for UPC, Description, and Unit Cost. The 'Settings' section includes a 'Trim Dates By:' dropdown menu and a 'Separate Data Into Different Tables By:' dropdown menu. A 'Preview' button is located at the bottom.

5. Select options / set fields as desired, then click **Preview**

System provides drop-down menus for chosen Filters

This screenshot shows the same configuration panel as above, but with 'Manufacturer Name' and 'Manufacturer Item Code' selected in the 'Filters' section. The 'Manufacturer Name' dropdown menu is set to '[All]'. The 'Manufacturer Item Code' dropdown menu is empty. The 'Group By' and 'Settings' sections are also visible.

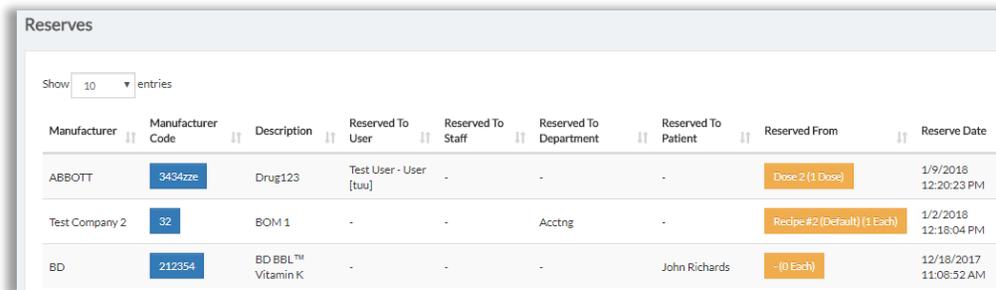
6. Set drop-down menus, then click **Run Report**

System returns data

UPC	Description	Unit Cost
00382902123545	BD BBL™ Vitamin K	10
00382902123545	BD BBL™ Vitamin K	10
00382902123545	BD BBL™ Vitamin K	3

Reserved Items List

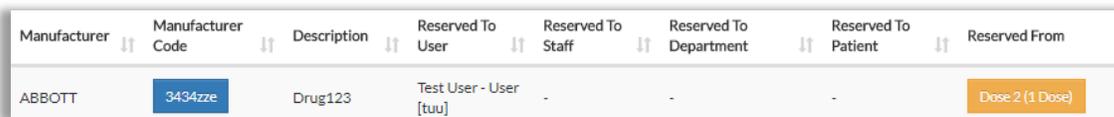
1. Go to Top Menu and click **Inventory Management**, then **Reserved Items** Report screen appears



The screenshot shows a web interface titled "Reserves". At the top, there is a "Show 10 entries" dropdown. Below is a table with the following columns: Manufacturer, Manufacturer Code, Description, Reserved To User, Reserved To Staff, Reserved To Department, Reserved To Patient, Reserved From, and Reserve Date. The table contains three rows of data.

Manufacturer	Manufacturer Code	Description	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From	Reserve Date
ABBOTT	3434zze	Drug123	Test User - User [tuu]	-	-	-	Dose 2 (1 Dose)	1/9/2018 12:20:23 PM
Test Company 2	32	BOM 1	-	-	Acctng	-	Recipe:#2(Default) (1 Each)	1/2/2018 12:18:04 PM
BD	212354	BD BBL™ Vitamin K	-	-	-	John Richards	(0 Each)	12/18/2017 11:08:52 AM

2. Click in Search box and search on patient, drug etc.
System shows matching record



The screenshot shows a single row from the Reserves table, highlighting the search results for the first row in the previous screenshot.

Manufacturer	Manufacturer Code	Description	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From
ABBOTT	3434zze	Drug123	Test User - User [tuu]	-	-	-	Dose 2 (1 Dose)

- To view product details, click box in column Manufacturer Code
- To view origin Shelf, click box in column Reserved From
- If you wish to Scan Back item to Inventory, click **Scan Back**

Search Patient List

In addition to reports, you can also view patient transactions and other data in the Patient List database

1. Go to Top Menu and click **Patients**
Patient List screen appears

Patient List

+ New Patient Create Patients in Bulk

Location: [All Locations] ▼

Search: jeff

Include Deleted

Search

- Click in Search box and scan in patient number, or type patient name; then click **Search**

Patient record appears at bottom

	First Name	Last Name	Gender	DOB	Patient Identifier
 	Jeff	Jones	Male	08/25/1985	96354

- Click **Details** (depending on your screen resolution, you may have to first click )

Patient Details popup appears, with Usage History on the right

Location: Headquarters

First Name: Jeff

Last Name: Jones

Sex: Male

Picture: 

Date of Birth: 08/25/1985

Patient ID: 96354

SSN:

Phone:

Assigned Products

Manufacturer	Manufacturer Code
DYNAREX CORPORATION	4301

Usage History:

Id	Type	Date	Total	
#569505	Transaction	12/29/2017	(\$1.00)	JFFS3760
#568745	Transaction	12/28/2017	(\$1.00)	JFFS3759

- If you want to edit the record, click **Edit**

Popup appears

Location: Headquarters ▼

First Name: Jeff

Last Name: Jones

Gender: Male ▼

Picture: Choose File No file chosen

Date of Birth: 08/25/1985

Patient ID: 96354

Assigned Products

+ Add Multiple Products

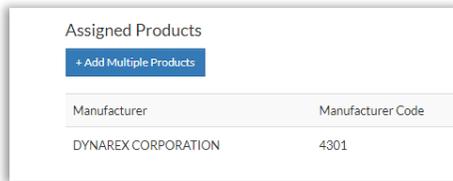
Manufacturer	Manufacturer Code
--------------	-------------------

5. Here you can Assign additional products to patient:

a. Click **+Add Multiple Products**

b. Select products, then click **Use Selected Items**

Popup shows selected Product



Manufacturer	Manufacturer Code
DYNAREX CORPORATION	4301

6. Update other fields as needed, then click **Save**