

# Adding Inventory

1. From the **Home** screen, go to **Operations** → **Inventory** → **Search Product Inventory**. The **Search Product Inventory** screen displays.

2. Click **Add New Item**.

The screenshot shows the 'Search Product Inventory' interface. It includes a navigation menu at the top with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The search filters are organized into sections: 'Search Location' (All, State, Agency, Clinic), 'Inventory Product ID', 'Inventory Product Name', 'State Inventory Number', 'Expiration Date', 'Inventory Type', 'Item ID', 'Item Name', 'Manufacturer Number', 'Inventory Status', and 'Search Type' (Serialized, Non-Serialized, Only Low Inventory). Below the filters are two empty tables for 'Inventory Search Results (Products)' and 'Inventory Search Results (Items)'. At the bottom, there are buttons for 'Add To Results By Scan', 'Add New Item' (circled in red), and 'Cancel'. The footer shows 'Online Version 0.50.196.14605 60026', 'CL2 - Shenandoah Valley Medical System', and 'TAB 100%'.

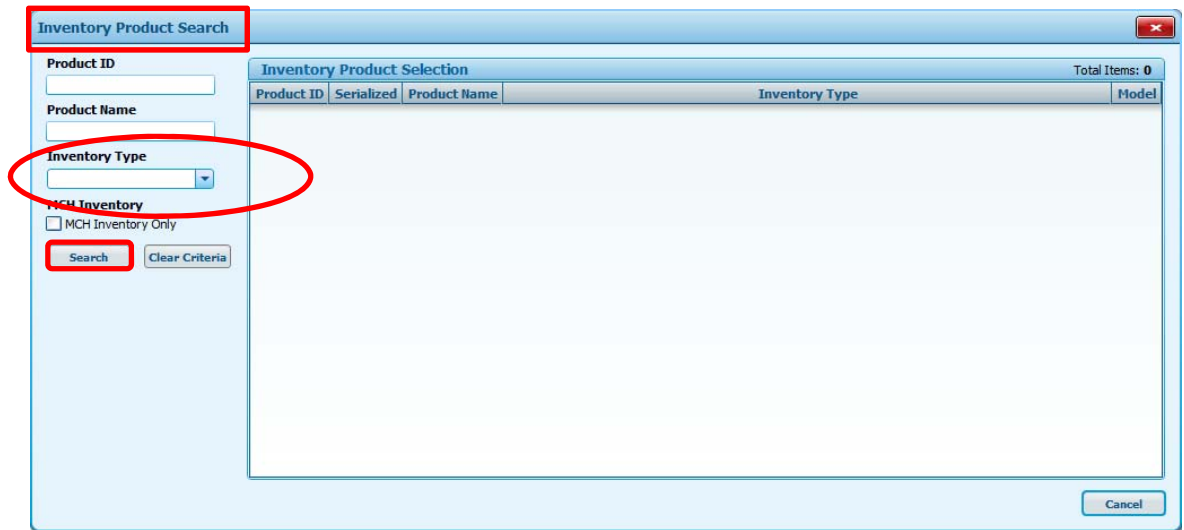
3. The **Add New Inventory Item** screen displays.

4. Click **Location** button (🔍) to search for and select your current clinic location if needed.

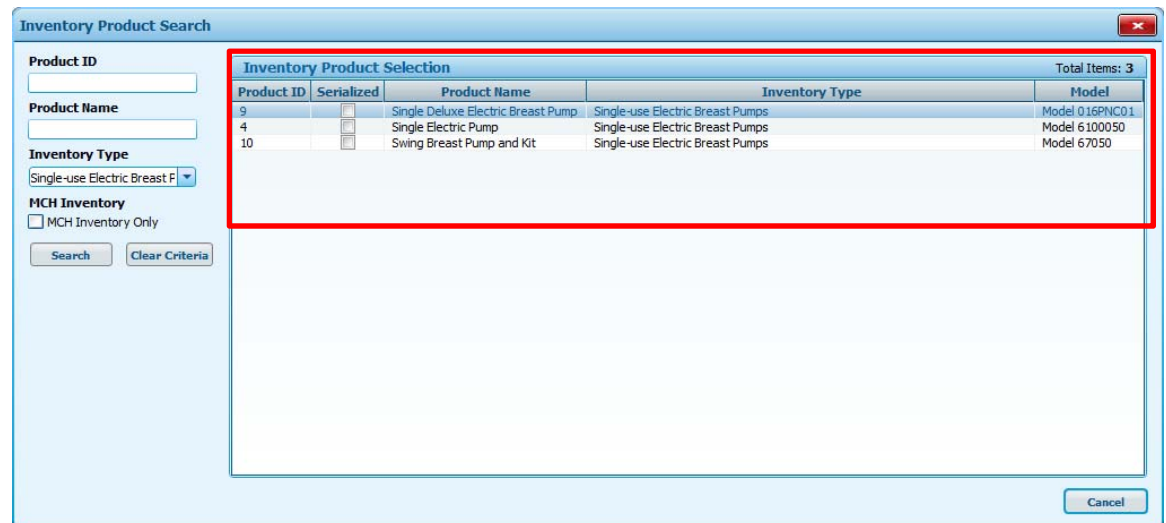
5. Click **Choose Inventory Product** button (🔍) to search for and select a product.

The screenshot shows the 'Add New Inventory Item' interface. It includes the same navigation menu as the previous screen. The main area features two buttons at the top: 'Location' (circled in red) and 'Choose Inventory Product' (circled in red). Below these are sections for 'Serialized Item' and 'Select Item Entry Method' (Single Item, Multiple Item). The 'Serialized Item' section contains fields for 'Item ID', 'Inventory Item Status' (On Hand), 'Expiration Date', 'Item Name', 'Manufacturer Number', 'Date Added To Inventory' (1/31/2013), and 'State Inventory Number'. There are also 'Scan Barcode' and 'Print Barcode' buttons. At the bottom, there are 'Save' and 'Cancel' buttons. The footer shows 'Online Version 0.50.196.14605 60020', 'CL2 - Shenandoah Valley Medical System', and 'TAB 100%'.

6. The **Inventory Product Search** screen displays.
7. Select an **Inventory Type** from the options in the dropdown box.
8. Click **Search**.



9. The **Inventory Product Selection** grid refreshes and displays the result of the search.
10. Double-click the desired product listed in the grid.



11. The **Add New Inventory Item** screen refreshes and displays the selected product.
12. Complete additional information for the product in the item details section. The item details section on the Add New Inventory Item screen displays differently for **non-serialized** and **serialized** items.

**Add New Inventory Item**

**Location**  
CL2 - Shenandoah Valley Medical System

**Product ID** 9      **Product Name** Single Deluxe Electric Breast Pump      **Inventory Type** Single-use Electric Breast Pumps

**Non Serialized Item**

**Item Name** ★ Single Deluxe Electric Breast Pump      **Expiration Date**      **Date Added To Inventory** 1/31/2013

**Quantity** ★      **Manufacturer Number**

For a non-serialized item, the **Non Serialized Item** group box contains the item details.

- Update the **Item Name** if necessary.
- Entering an **Expiration Date** is not required.
- Enter the **Quantity**.
- Enter or update the serial number in the **Manufacturer Number** field if necessary.

For a serialized item, the **Serialized Item** group box contains the item details.

- Select either the **Single Item** or **Multiple Item** radio button under **Select Item Entry Method** as necessary.
- Entering an **Expiration Date** is not required.
- Update the **Item Name** if necessary.
- Enter the serial number in the **Manufacturer Number** field.
- Enter the Fixed Asset Tag Number in the **State Inventory Number** field.

**Add New Inventory Item**

**Location**  
CL2 - Shenandoah Valley Medical System

**Product ID** 8      **Product Name** Lactina Plus Breast Pump      **Inventory Type** Multi-use Breast Pumps

**Serialized Item**

**Select Item Entry Method**  
 Single Item     Multiple Item

**Item ID**      **Inventory Item Status** On Hand      **Expiration Date**

**Item Name** ★ Lactina Plus Breast Pump      **Manufacturer Number** ★      **Date Added To Inventory** 1/31/2013      **State Inventory Number** ★

Out for Maintenance

Scan Barcode    Print Barcode

13. Click **Save**. The **Search Product Inventory** screen refreshes and displays a status message indicating success.

# Searching for Existing Inventory

- From the **Home** screen, go to **Operations** → **Inventory** → **Search Product Inventory**. The **Search Product Inventory** screen displays.
- Under **Search Location**, select your agency or clinic location.
- Complete one or more of the following:
  - Enter an **Inventory Product Name**.
  - Enter a **State Inventory Number**.
  - Select an **Inventory Type**.
  - Enter an **Item ID**.
  - Enter an **Item Name**.
  - Enter a **Manufacturer Number**.
- Click **Search**.

- The **Inventory Search Results (Products)** and **Inventory Search Results (Items)** grids refresh and display the results of the search.

Inventory Search Results (Products)					Inventory Search Results (Items)				
Inventory Product ID	Inventory Product Name	Total on Order	Reorder Point	Total on Hand	Item ID	Item Name	State Inventory Number	Status	Quantity
8	Lactina Plus Breast Pump	14	40	30	57	Lactina Plus Breast Pump	100	Issued	1
11	EBT Card	0	40	126	58	Lactina Plus Breast Pump	101	Issued	1
12	ID Card	40	40	-2	59	Lactina Plus Breast Pump	102	Issued	1
24	Farmers Market Booklet	28	40	25	60	Lactina Plus Breast Pump	103	Issued (Reserved)	1
40	Demo SK Product	0	50	20	61	Lactina Plus Breast Pump	104	Issued (Reserved)	1
					62	Lactina Plus Breast Pump	105	Issued (Reserved)	1
					63	Lactina Plus Breast Pump	106	Issued	1
					64	Lactina Plus Breast Pump	107	Issued	1
					67	Lactina Plus Breast Pump	110	Maintenance	1
					68	Lactina Plus Breast Pump	111	Issued	1
					69	Lactina Plus Breast Pump	112	On Hand	1

# Disposing of Inventory

1. On the **Search Product Inventory** screen, perform a search if necessary.
2. Double-click a product listed within the **Inventory Search Results (Products)** grid. The items associated to the selected product display in the **Inventory Search Results (Items)** grid.

**Search Inventory Product Inventory**

Search Location:  All  State  Agency  Clinic  
 065-01 - New Hanover

Inventory Product ID: \_\_\_\_\_ Inventory Product Name: \_\_\_\_\_ State Inventory Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Inventory Type: \_\_\_\_\_  
 Item ID: \_\_\_\_\_ Item Name: \_\_\_\_\_ Manufacturer Number: \_\_\_\_\_ Inventory Status: \_\_\_\_\_

Search Clear Criteria

**Inventory Search Results (Products)** Total Items: 43

	Inventory Product ID	Inventory Product Name	Total on Order	Reorder Point	Total on Hand
<input type="checkbox"/>	64	Breast Shell System	0	0	3
<input type="checkbox"/>	65	Disposable Bra Pads	0	0	3
<input type="checkbox"/>	66	Disposable Bra Pads-Sample 4 pack	0	0	3
<input type="checkbox"/>	67	Cotton-Washable Pads	0	0	3
<input type="checkbox"/>	68	Disposable Pads	0	0	3

Selected Row Details: Order Transfer

**Inventory Search Results (Items)** Total Items: 1

	Item ID	Item Name	State Inventory Number	Status	Quantity
<input type="checkbox"/>	40	Disposable Pads		On Hand	3

Selected Row Details: Issue Reserve Dispose Return Items

3. Select the check box associated to an item within the **Inventory Search Results (Items)** grid.
4. Click **Dispose**.

**Inventory Search Results (Items)** Total Items: 1

	Item ID	Item Name	State Inventory Number	Status	Quantity
<input checked="" type="checkbox"/>	40	Disposable Pads		On Hand	3

Selected Row Details: Issue Reserve **Dispose** Return Items



5. The **Dispose Inventory Items** screen displays
6. Update the quantity in the **Quantity to Dispose** column of the **Inventory Items to Reserve** grid as necessary.
7. Enter or select the **Disposition Date**.
8. Select the **Disposition Reason**.
9. Enter **Comments** as necessary.
10. Click **Dispose**.

**Dispose Inventory Items**

Item ID	Item Name	State Inventory Number	Status	Quantity	Quantity to Dispose
40	Disposa Pads		On Hand	3	2

Disposition Date: 7/9/2013  
Disposition Reason: Damaged

Comments: child opened by accident

Dispose Cancel

11. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity**.

**Inventory Search Results (Products)** Total Items: 43

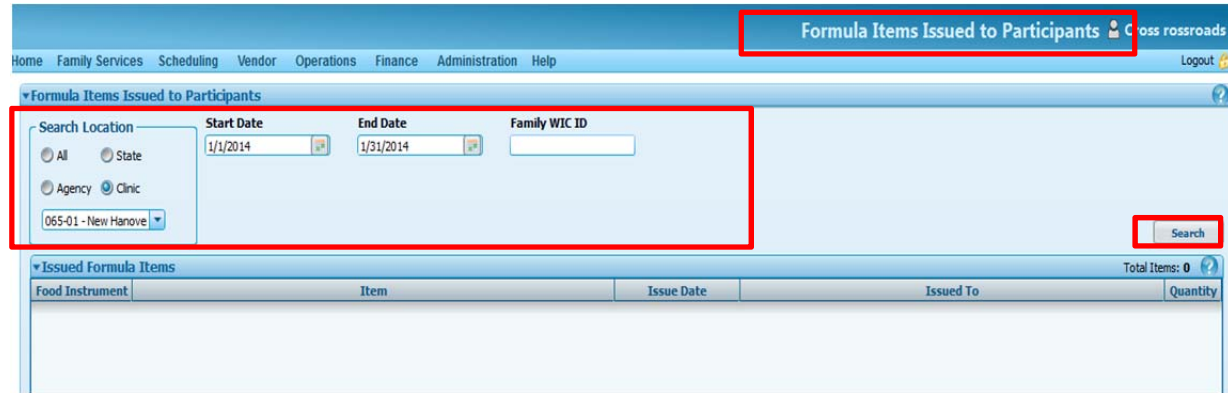
Inventory Product ID	Inventory Prod	Total on Order	Reorder Point	Total on Hand
64	Breast Shell System	0	0	3
65	Disposable Bra Pads	0	0	3
66	Disposable Bra Pads-Sample 4 pack	0	0	3
67	Cotton-Washable Pads	0	0	3
68	Disposable Pads	0	0	1

**Inventory Search Results (Items)** Total Items: 1

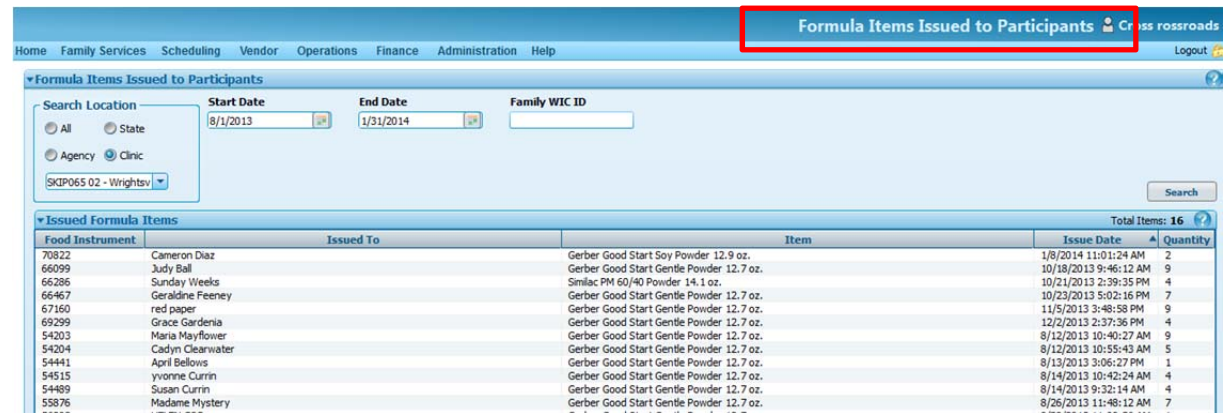
Item ID	Item Name	State Inventory Number	Status	Quantity
40	Disposable Pads		On Hand	1

# Searching for Formula Items Issued to Participants

1. From the **Home** screen, go to **Operations** → **Inventory** → **Issued Formula Items**. The **Formula Items Issued to Participants** screen displays.
2. Under **Search Location**, select your agency or clinic location.
3. Complete information in one or more of the following to filter the list of results displayed in the **Issued Formula Items** grid:
  - **Start Date**
  - **End Date**
  - **Family WIC ID**
4. Click **Search** to perform a search.



5. The **Issued Formula Items** grid refreshes and displays records matching the search criteria specified under **Formula Items Issued to Participants**. The Issued Formula Items grid displays the Food Instrument number, Item, Issue Date, participant name and quantity for each formula item issued that matches the search criteria.



Note: You may click on a column header to sort the items in the grid. You may click and hold on a column header, then drag and drop columns of information to reorganize the order of the columns in the grid.