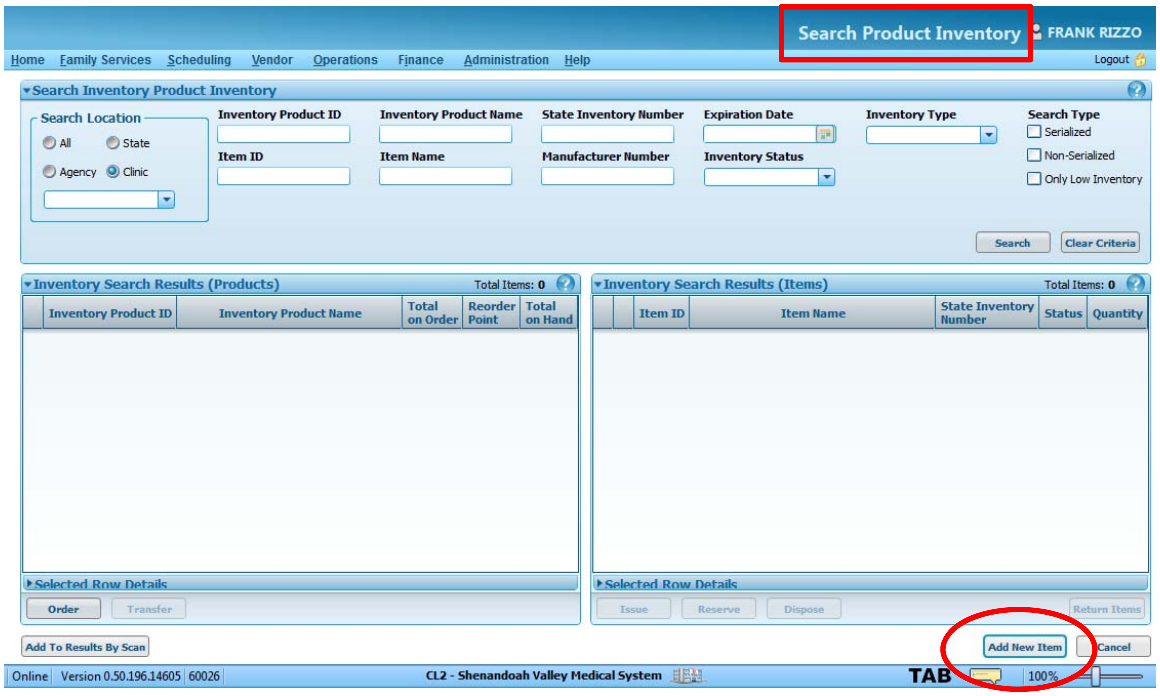
Adding Inventory

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

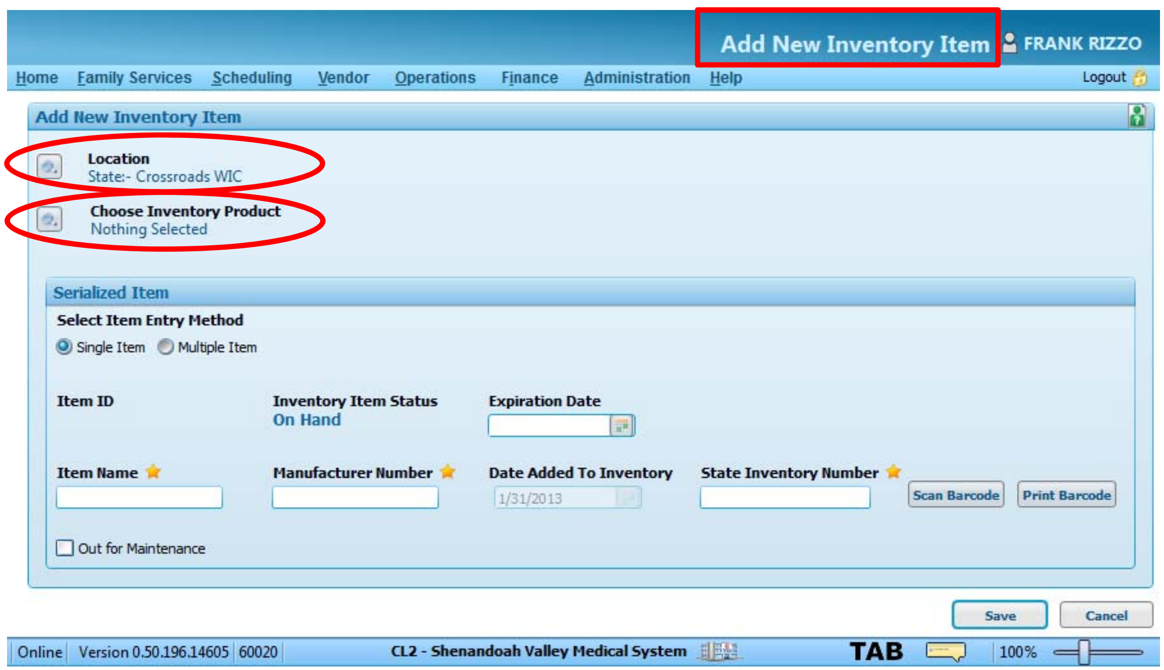
2. Click **Add New Item**.



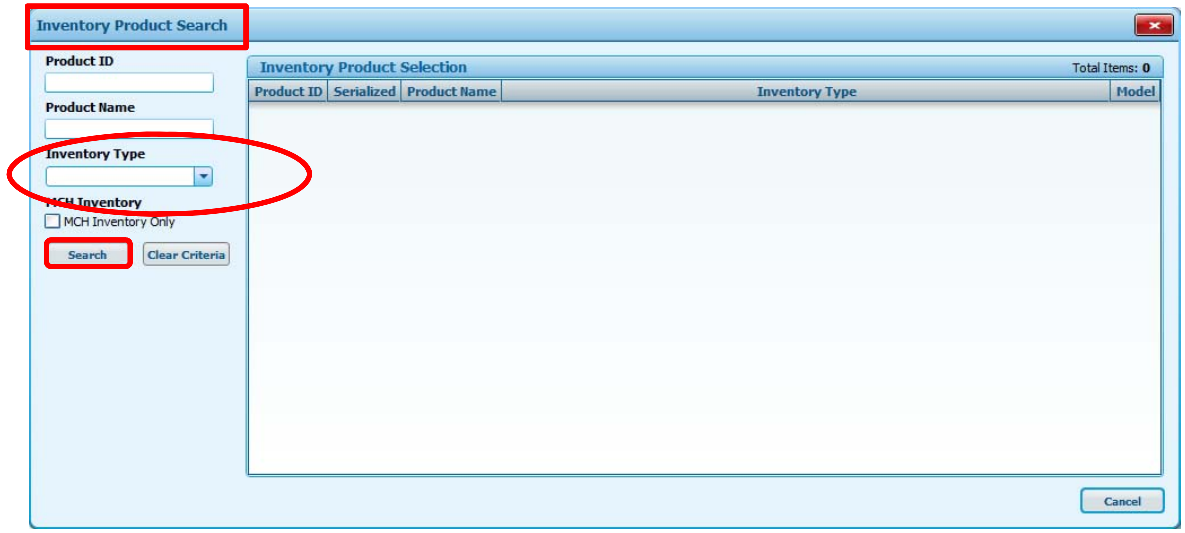
3. The **Add New Inventory Item** screen displays.

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

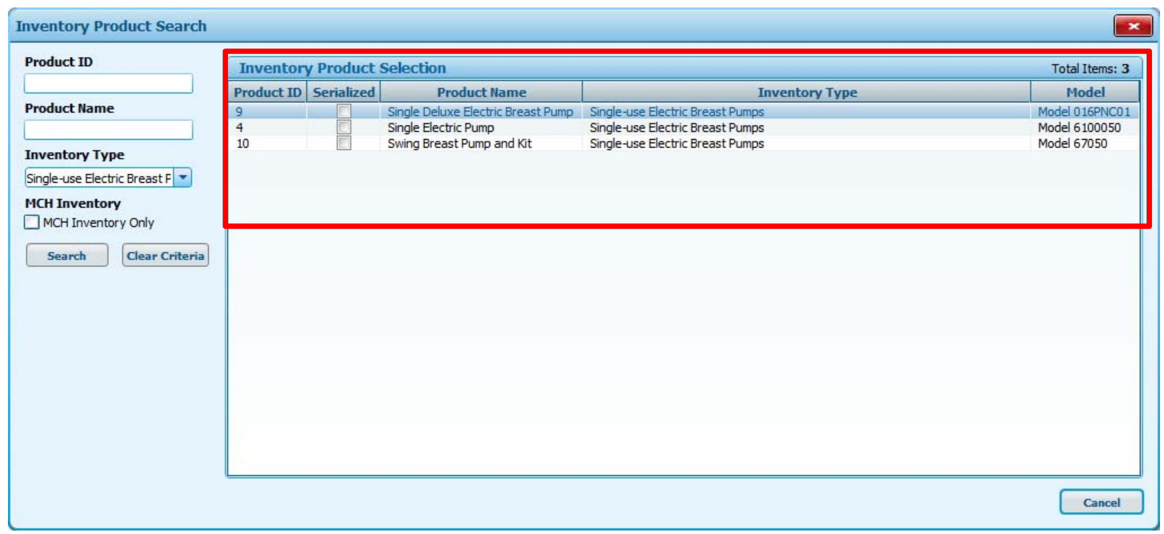
5. Click **Choose Inventory Product** button ( ) to search for and select a product.



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

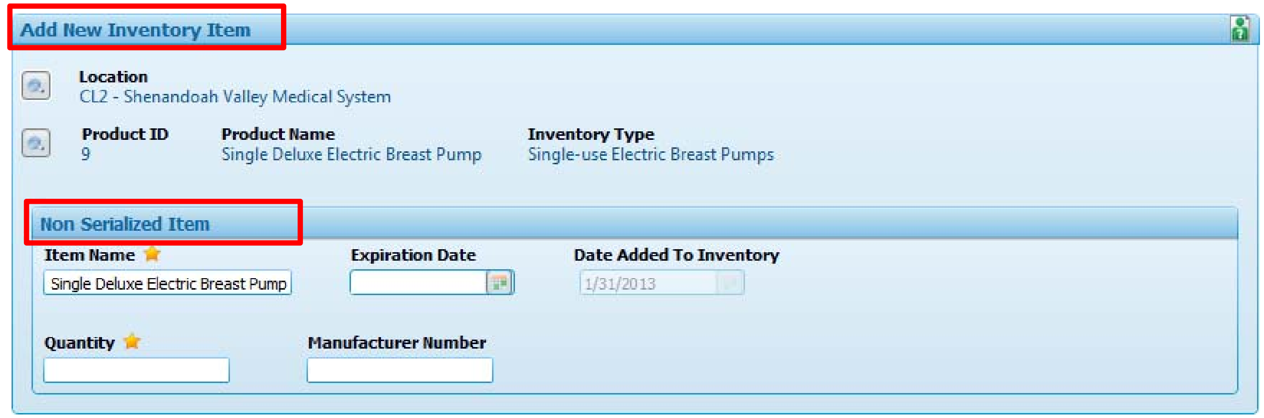


9. The **Inventory Product Selection** grid refreshes and displays the result of the search.
10. Double-click the desired product listed in the grid.



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.

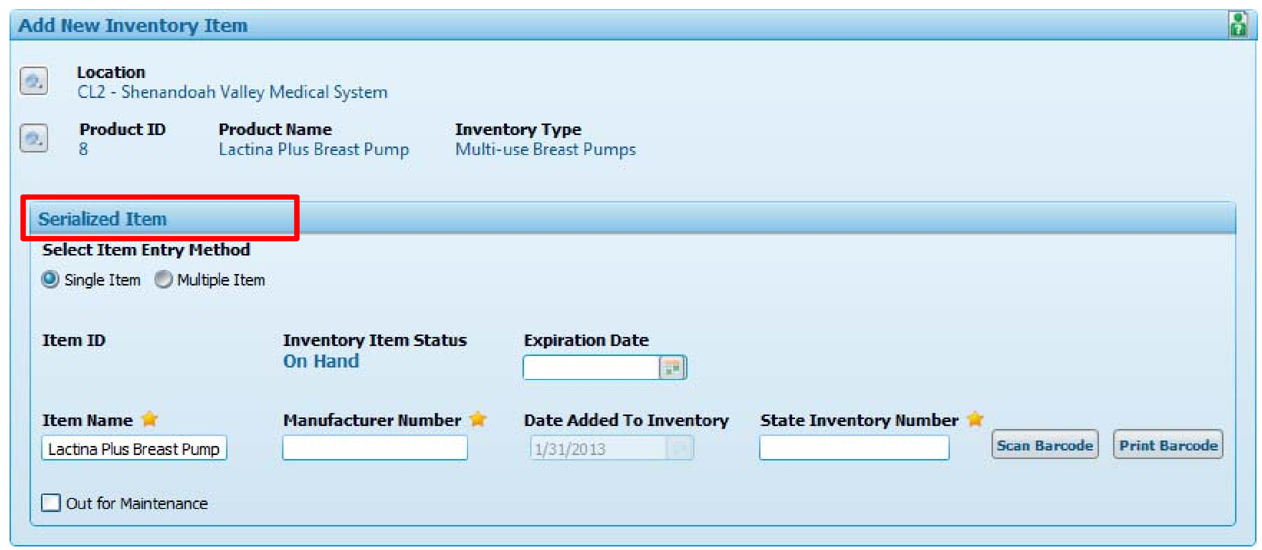


For a non-serialized item, the **Non Serialized Item** group box contains the item details.

- 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.



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

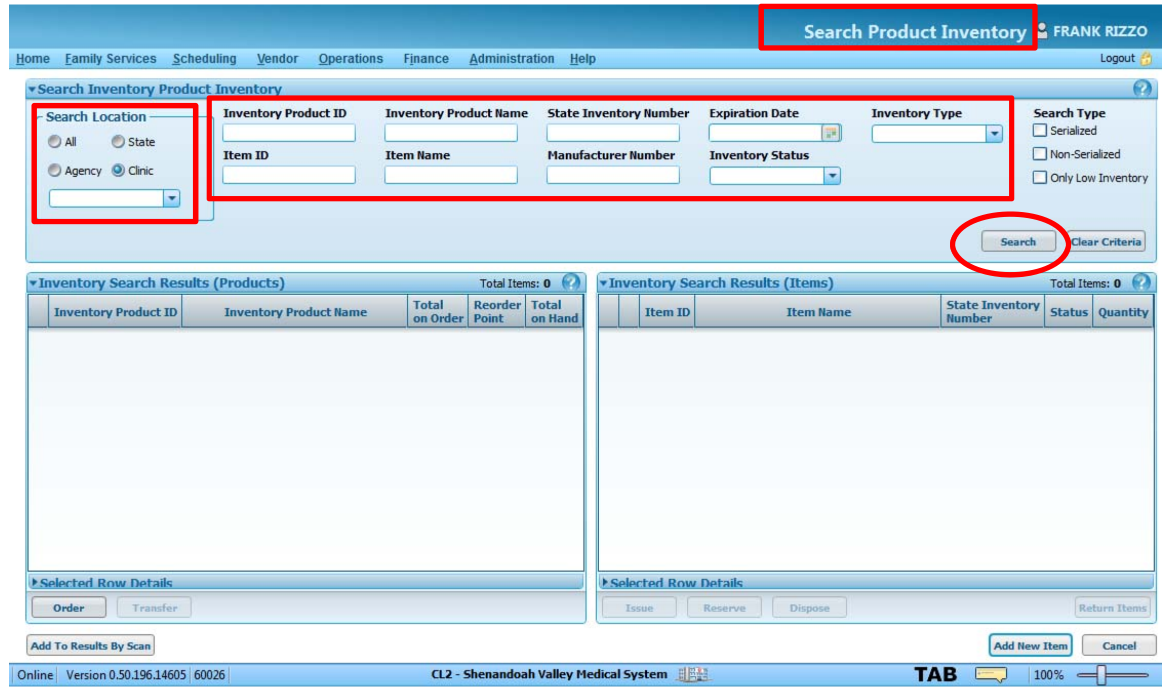
Searching for Existing Inventory

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

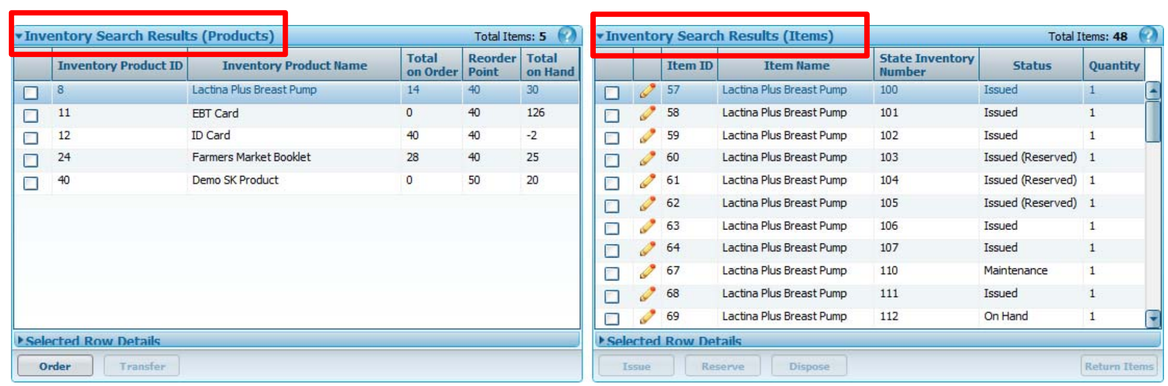
2. Under **Search Location**, select your agency or clinic location.

3. 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**.

4. Click **Search**.



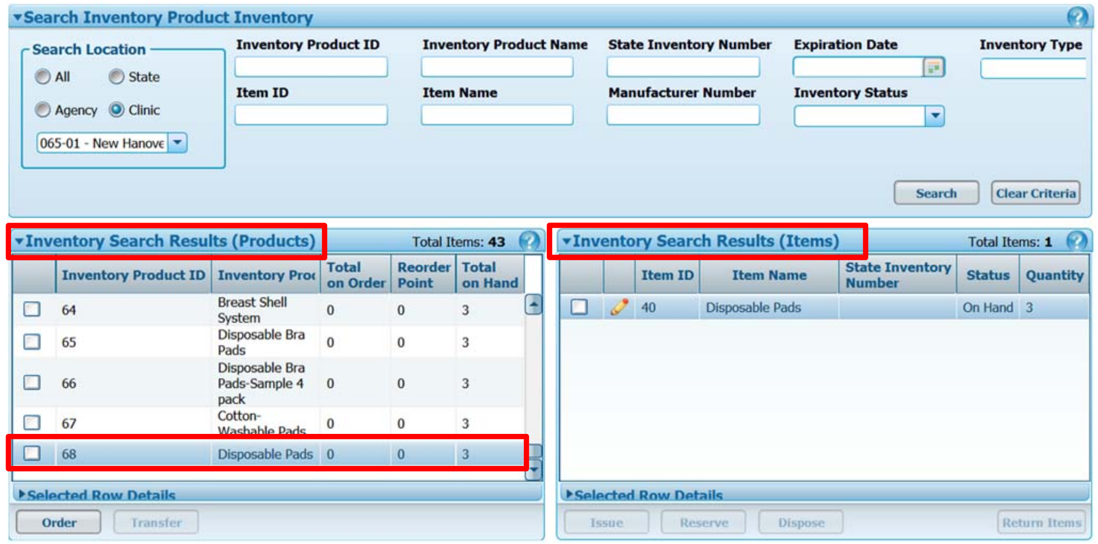
5. The **Inventory Search Results (Products)** and **Inventory Search Results (Items)** grids refresh and display the results of the search.



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.



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

4. Click **Dispose**.

5. The **Dispose Inventory Items** screen displays

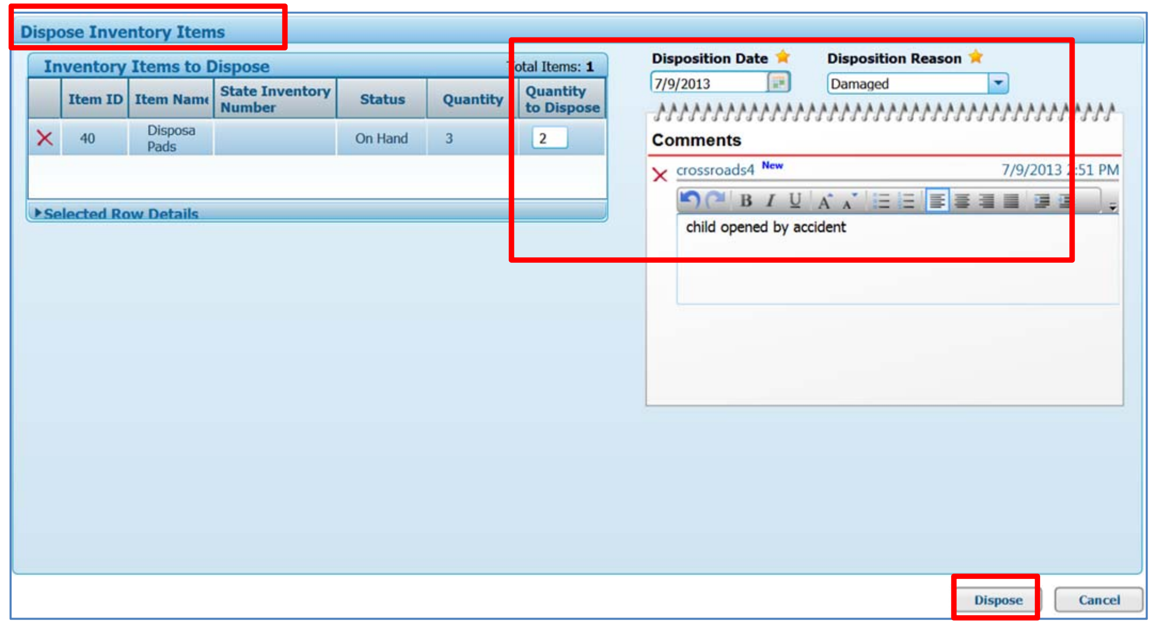
6. Update the quantity in the **Quantity to Dispose** column of the **Inventory Items to Reserve** grid as necessary.

7. Enter or select the **Disposition Date**.

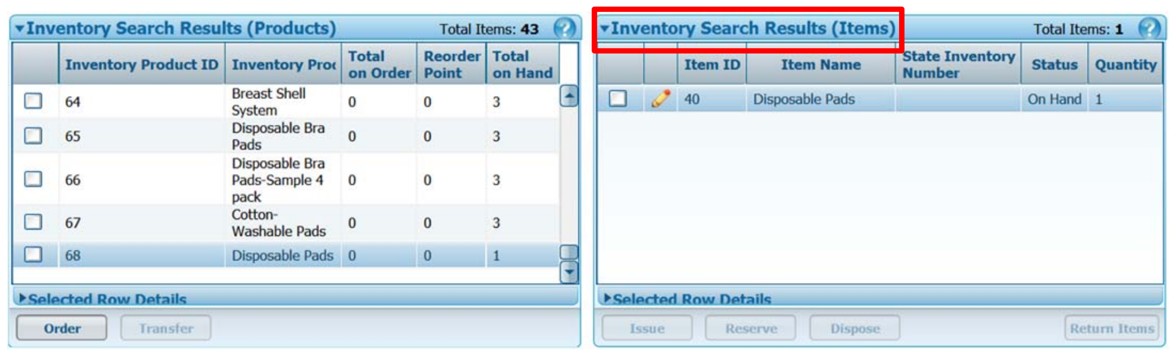
8. Select the **Disposition Reason**.

9. Enter **Comments** as necessary.

10. Click **Dispose**.

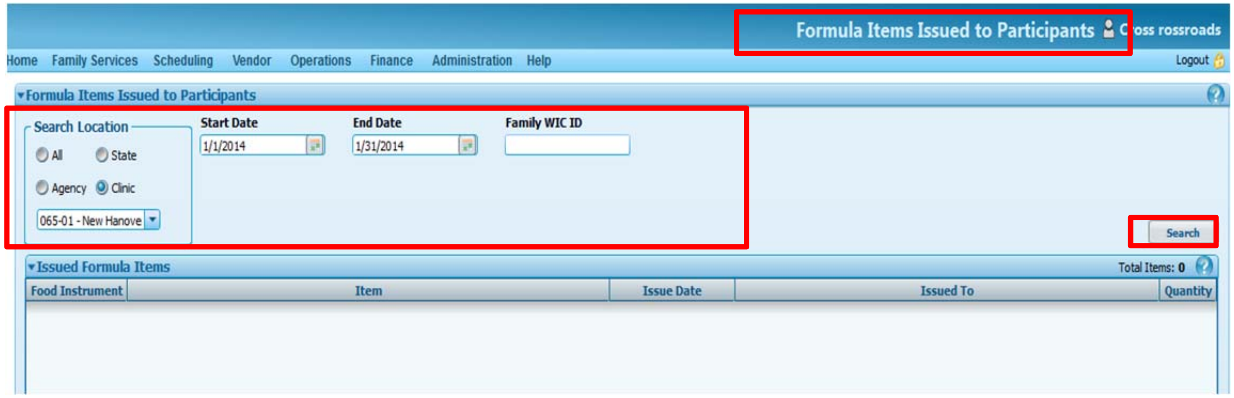


11. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity**.



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.