

DESKTOP: MANAGE SUPPLY ORDERS (PERPETUAL INVENTORY)

Supply orders are usually created based on item usage, adjustments or a scheduled supply order generation process.

If a manual intervention is required, create a supply order for the specific location and item.

Follow the steps below to create, modify and approve supply orders for perpetual inventory.

CREATE SUPPLY ORDER

1. After launching the **Supply Orders** resource, select **Create**.
2. Confirm, modify, or define the order **Source Location**, **Destination Location**, **Item**, **Order Quantity** and **UOM**.
3. Set the replenishment as **Critical >Yes** and select **Continue**.
4. Select **Submit** to send supply order.

MODIFY REORDER GROUP SCHEDULE

1. After launching the **Reorder Groups** resource, search and retrieve the reorder group.
2. Select the **arrow** to bring up details for the reorder group.
3. Select **Schedules** and confirm or modify the schedule rule as needed, including recurrence, schedule date, hour, and date.
4. Select **Save**.

CREATE SUPPLY ORDER BY LOCATION

1. After launching the **Locations** resource, enter the search criteria for the hospital and the location you want to generate the supply order for.
2. Select **Search**.
3. Select the **Multi-Row Action** button.
4. Select the **Generate Supply Order** action.

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MODIFY ORDER QUANTITY

1. After launching the **Supply Orders** resource, set the **Order Status** as "1-New". Select **Search**.
2. Double-click the **Order Quantity** field.
3. Adjust the **Order Quantity**.
4. Select the **checkmark** to confirm the change.

APPROVE INDIVIDUAL SUPPLY ORDER

1. After launching the **Supply Orders** resource, set the **Order Status** as "1-New". Select **Search**.
2. Select **View Record Details**.
3. Set the **Approved** flag to "Yes".
4. Select **Save**.

APPROVE MULTIPLE SUPPLY ORDERS

1. After launching the **Supply Orders** resource, set the **Order Status** as "1-New". Select **Search**.
2. Select both orders by selecting the **checkbox**.
3. Select the **Use Selected Fields as Criteria for Action** icon and choose the **Update Fields** action.
4. Select the **Approve** field from the Maintainable Fields dropdown and click **Add**.
5. Select the **Set Value To** field from the Approved dropdown and set the value to "Yes"
6. Select **Submit**.

QUESTIONS?