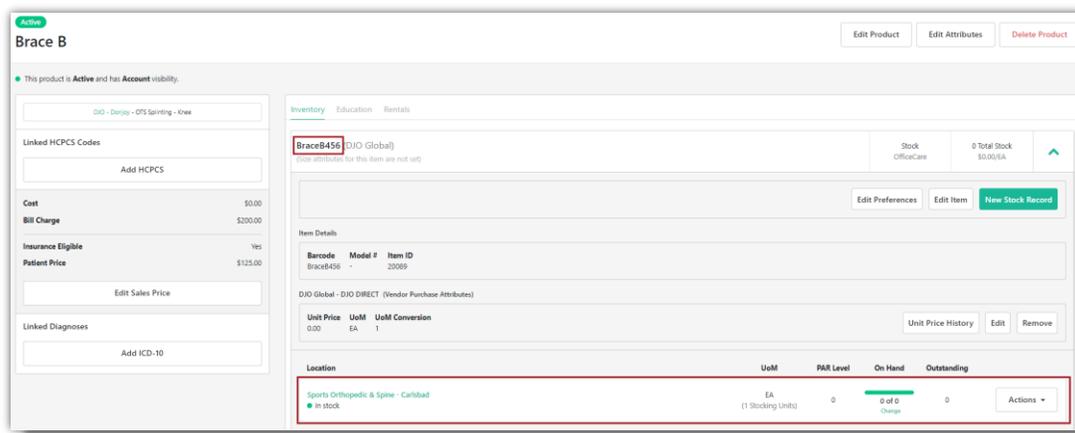


MANAGING REPLACEMENT ITEMS

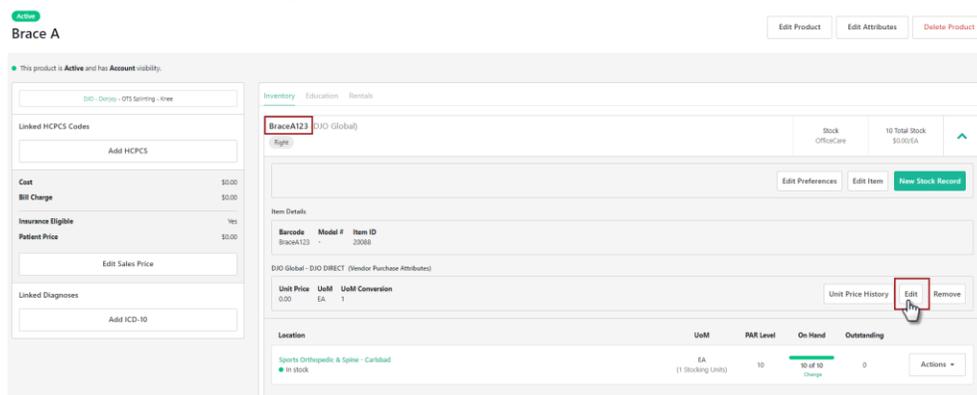
The new feature called Replacement Items was built to accommodate the need to use up one product and order another product in its place. This feature can be used for any of the following use cases: a product is no longer being manufactured and a new product needs to be ordered to replace it, a product is being phased out by a specific provider to be replaced with a new product, long-term backorders or replacing a product from one vendor with the same or different product from a different vendor. The key to this feature is the Par Level being automatically updated when a Restock is created so it doesn't have to be manually modified on each the products. Submit a Help Ticket if any assistance is needed to ensure products are set up correctly.

Products With the Same Vendor & UOM is One

In this example Brace A needs to be replaced by Brace B and they are both supplied by the same Vendor and the UOM (Unit of Measure) is Each and One. To start, the replacement product (Brace B) needs to be created, the Vendor added, and a Stock Record created for the same Inventory Location as the product being replaced. The Par Level and On-hand values should be set at zero.



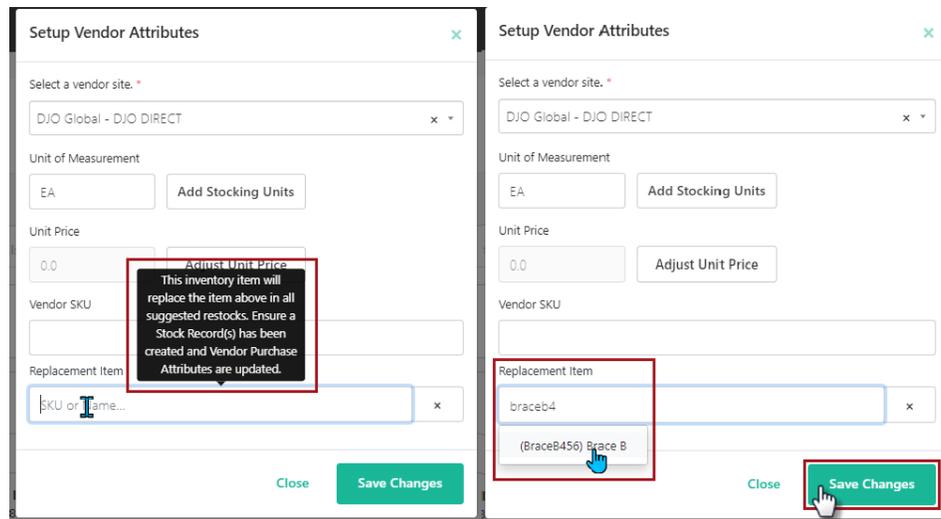
Once the replacement product has been created and set up (see Create a New Product article in the Help Center), navigate to the product being replaced (Brace A in this example). **Click on the Vendor Edit button.**



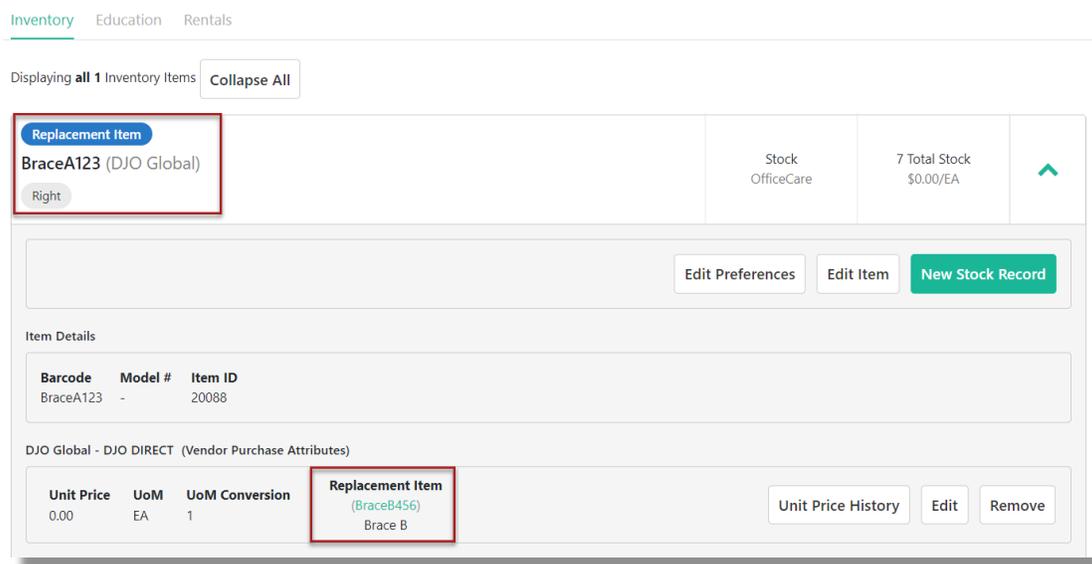
MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is One (Continued)

In the Vendor Attributes modal a new field labeled 'Replacement Item' will now appear. Hovering over the field shows a tooltip reading *This inventory item will replace the item above in all suggested restocks. Ensure a Stock Record(s) has been created and Vendor Purchase Attributes Update.* This is a search field to locate the SKU for the replacement product (Brace B). If a Stock Record does not exist for the replacement product, the product will not show in the search. Once the correct replacement product has been found, select it, and **click Save Changes** to the modal.



Once the Replacement Item has been linked to the product being replaced, the product page for Brace A will show a Replacement pill above the Item/SKU and the replacement item SKU and name will appear on the Vendor Purchase Attribute line. Clicking on the replacement item will take you to the product's show page with that item expanded.

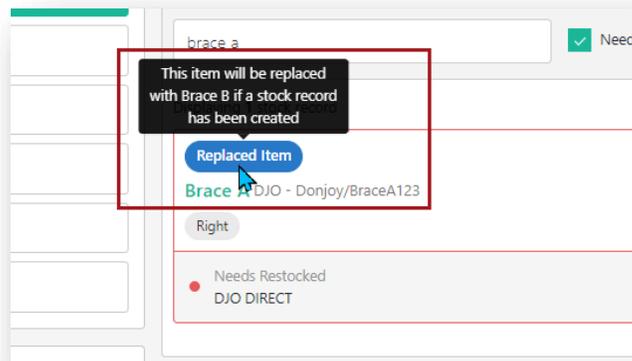


MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is One (Continued)

Once the Replacement Item product has been added to the product being replaced, any time the product being replaced (Brace A) is dispensed the system will automatically recommend a restock for the Replacement Item (Brace B).

In this example, Brace A was dispensed to a patient. When viewing Brace A on the Stock by Item tab in the Inventory Location, a blue pill labeled Replaced Item is visible indicating it will be replaced by a different item. Hovering or clicking on the pill shows a tooltip *This item will be replaced with Brace B if a stock record has been created*.



After dispensing Brace A to the patient, the On-hand decremented and the Quantity Needed is now 1. The Par Level stays static at 10.

Active Sports Orthopedic & Spine - Carlsbad Edit Location

Restock 5 Items

- Manual Restock
- View All Restocks
- View/Add Usage
- Inventory Counts
- Download Stock

Inventory Settings

Stock by Item Incomplete Restocks

brace a Needs Restock Reset

Displaying 1 stock record

Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace A DJO - Donjoy/BraceA123	EA	10	9 of 10	0	1

Right

Needs Restocked
DJO DIRECT

Add to Transfer Actions

MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UoM is One (Continued)

Clicking the Restock X button opens the Restock Form where Brace B is now visible. A blue pill labeled Replacement Item indicates it is replacing another product.

ct.

Hovering over or clicking the blue Replacement Item pill shows a tooltip reading *Brace B is replacing 1 unit of Brace A*. The On-hand + Outstanding Quantity bar has been removed and an informational tooltip reads *Brace B is replacing 1 unit of Brace A*.

Click the Create 1 Restock button to create the restock order.

MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is One (Continued)

As soon as the Replacement Item is on a Created restock the Par Levels of both items are automatically adjusted depending on the value of the Quantity Needed.

In the example below, a quantity of 1 was needed of Brace B to replace Brace A. Upon Creation of the Restock, the Par Level of Brace A decreased by 1 and the Par Level of Brace B increased by 1. This functionality makes it so no suggested restocks for Brace A will show until the On-hand level drops below the new Par Level of 9. Brace B's Par Level will continue to increase as Brace A's decreases. Comparing the two products, the Par Levels will add up to the Par Level originally set on the product being replaced.

Stock by Item Incomplete Restocks

brace Needs Restock

Displaying all 4 stock records

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace A DJO - Donjoy/BraceA123 Right DJO DIRECT	EA	9	9 of 9	0	0
Brace B DJO - Donjoy/BraceB456 DJO DIRECT	EA	1	0 of 1	1	0

Buttons: Add to Transfer, Actions, Nothing to Transfer, Actions

The Check In process for replacement items works the same as any other product.

Check In 74265 Vendor DJO DIRECT
Restock for Sports Orthopedic & Spine - Carlsbad

Search/Scan Item

Sports Orthopedic & Spine - Carlsbad 1 Item

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Previously Checked In (UoM)	Previously Cancelled (UoM)	Quantity Open (UoM)	Quantity to Check In (UoM)
Brace B DJO - Donjoy	BraceB456	EA (1 Stocking Units)	1 of 1	0	0	1	1 Max: 1 EA

Buttons: Cancel, Check In

MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is One (Continued)

The replacement item (Brace B) stock record is updated to show the 1 item checked in.

Stock by Item Incomplete Restocks

brace Needs Restock

Displaying all 4 stock records

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace A DJO - Donjoy/BraceA123 Right	EA	9	9 of 9	0	0
DJO DIRECT				<input type="button" value="Add to Transfer"/>	<input type="button" value="Actions"/>
Brace B DJO - Donjoy/BraceB456	EA	1	1 of 1	0	0
DJO DIRECT				<input type="button" value="Add to Transfer"/>	<input type="button" value="Actions"/>

Products With Different Vendors & UOM is One

The process for ordering replacement item products from a different vendor than the product being replaced is no different than the above process. The key is to ensure that the replacement item vendor is correctly set up. In this example Brace C using vendor McKesson is being replaced by Brace D using vendor DJO Direct.

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace C DJO - Donjoy/BraceC789	EA	10	9 of 10	0	1
Needs Restocked McKesson DJO				<input type="button" value="Add to Transfer"/>	<input type="button" value="Actions"/>
Brace D DJO - Donjoy/BraceD890	EA	0	0 of 0	0	0
DJO DIRECT				<input type="button" value="Nothing to Transfer"/>	<input type="button" value="Actions"/>

When the Restock X button is clicked, the replacement item's vendor will be visible, not the vendor of the product being replaced. In the below example Brace D is showing up under the new vendor DJO Direct.

Restock From Order

All products should be ordered directly from a vendor.

DJO Global - DJO DIRECT

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (each)	Order Quantity (each)	Unit Price	Ext Price
Brace D is replacing 1 units of Brace C Brace D DJO - Donjoy	BraceD890	EA (1 Stocking Units)	0	1	1	0.00	0.00

SKU or Name:

Select Vendor Site

Total Price: 0.00
Free Shipping Threshold: \$250.00
\$250.00 Unit Free Shipping

MANAGING REPLACEMENT ITEMS

Products With Different Vendors & UOM is One (Continued)

When the restock is Created the same Par Level adjustments occur.

Replaced Item Brace C DJO - Donjoy/BraceC789		UoM EA	PAR 9	On Hand 9 of 9	Outstanding 0	Qty Needed 0
McKesson DJO		<input type="button" value="Add to Transfer"/> <input type="button" value="Actions"/>				
Brace D DJO - Donjoy/BraceD890		UoM EA	PAR 1	On Hand 0 of 1	Outstanding 1	Qty Needed 0
DJO DIRECT		<input type="checkbox"/> Nothing to Transfer <input type="button" value="Actions"/>				

Products With the Same Vendor & UOM is Greater Than One

The process to order replacement items in cases or boxes follows the same process. The only difference is what happens to the Par Levels once the restock is created for the replacement item. In this example, Brace E with a UOM of 10 (per case) is being replaced by Brace F with a UOM of 10 (per case).

Replaced Item Brace E DJO - Donjoy/BraceEUOM-10		1 CS = 10 Stocking Units CS 10		On Hand 9 of 10	Outstanding 0	Qty Needed 1
Needs Restocked DJO DIRECT		<input type="button" value="Add to Transfer"/> <input type="button" value="Actions"/>				
Brace F DJO - Donjoy/BraceFUOM-10		1 CS = 10 Stocking Units CS 0		On Hand 0 of 0	Outstanding 0	Qty Needed 0
DJO DIRECT		<input type="checkbox"/> Nothing to Transfer <input type="button" value="Actions"/>				

When the Restock X button is clicked the replacement item is visible, Brace F in this example. The UOM for the replacement item will be displayed so it's clear the order will include X number of cases and the quantity in each case.

Restock From Order

All products should be ordered directly from a vendor.

DJO Global - DJO DIRECT Remove Vendor Site

Product	Item #	UoM	On Hand - Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Unit Price	Ext Price
Replacement Item Brace F 10 - Donjoy	BraceFUOM-10	CS (10 Stocking Units)	0	(10 Stocking Units) 1	1	0.00	0.00

SKU or Name:

Select Vendor Site:

Total Price: 0.00
Free Shipping Threshold: \$250.00
\$250.00 Until Free Shipping

MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is Greater Than One (Continued)

Once the Restock is Created the Par Levels of each product are automatically adjusted. The difference in this scenario is **the Par Level will either be decreased or increased by the UOM value, not the quantity needed**. In this example, the Par Level of Brace E decreased by 10 (UOM) and Brace F increased by 10 (UOM) setting the Par Level of Brace E to zero. This way, the product being replaced can continue to be dispensed and another suggested restock will not be suggested unless the Par Level is greater than the UOM value.

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace E DJO - Donjoy/BraceEUOM-10	CS	0	9 of 0	0	0
DJO DIRECT	Add to Transfer Actions				
Brace F DJO - Donjoy/BraceFUOM-10	CS	10	0 of 10	10	0
DJO DIRECT	Nothing to Transfer Actions				

Products With the Same Vendor & UOM is Greater Than One and Does Not Match

The process to order replacement items in cases or boxes follows the same process. The only difference is what happens to the Par Levels once the restock is created for the replacement item. In this example, Brace G with a UOM of 10 (per case) is being replaced by Brace H with a UOM of 5 (per case).

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace G DJO - Donjoy/BraceGUOM-10	CS	10	9 of 10	0	1
DJO DIRECT	Add to Transfer Actions				
Brace H DJO - Donjoy/BraceHUOM-5	CS	0	0 of 0	0	0
DJO DIRECT	Nothing to Transfer Actions				

When the Restock X button is clicked the replacement item is visible, Brace H in this example. The UOM for the replacement item will be displayed so it's clear the order will include X number of cases and the quantity in each case. In this example the replacement product is ordered in cases of 5.

Restock From Order

* All products should be ordered directly from a vendor.

DJO Global - DJO DIRECT Remove Vendor Site

Product	Item #	UoM	On Hand - Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Unit Price	Ext Price
Brace H BIO - Donjoy	BraceHUOM-5	CS (5 Stocking Units)	0 (5 Stocking Units)	5 (5 Stocking Units)	1	0.00	0.00

SKU or Name:

Select Vendor Site: Add Vendor Site

Total Price: 0.00
Free Shipping Threshold: \$250.00
\$250.00 until free shipping

Cancel Create 1 Restock

MANAGING REPLACEMENT ITEMS

Products With the Same Vendor & UOM is Greater Than One and Does Not Match (Continued)

Once the Restock is Created the Par Levels of each product are automatically adjusted. The difference in this scenario is **the Par Level will either be decreased or increased by the UOM value, not the quantity needed**. In this example, the Par Level of Brace G decreased by 5 (UOM) and Brace F increased by 5 (UOM) which is the UOM of the replacement product. This way, the product being replaced can continue to be dispensed and another suggested restock will not be suggested until the on-hand of Brace G reaches 4.

Replaced Item Brace G DJO - Donjoy/BraceGUOM-10		UoM	PAR	On Hand	Outstanding	Qty Needed
DJO DIRECT		CS	5	9 of 5	0	0
Brace H DJO - Donjoy/BraceHUOM-5		UoM	PAR	On Hand	Outstanding	Qty Needed
DJO DIRECT		CS	5	0 of 5	5	0

Special Considerations

Visibility of the Replacement Item

The replacement item for Brace A, Brace B in this example, will not show on the Stock by Item tab under Needs Restock. The only time the replacement item, Brace B, becomes visible is when it has a Quantity Needed value.

Stock by Item Incomplete Restocks		<input type="checkbox"/> Needs Restock <input type="button" value="Reset"/>				
Displaying stock records 1 - 10 of 12 in total						
Replaced Item Brace A DJO - Donjoy/BraceA123		UoM	PAR	On Hand	Outstanding	Qty Needed
DJO DIRECT		EA	5	2 of 5	0	3
Needs Restocked DJO DIRECT		<input type="button" value="Add to Transfer"/>		<input type="button" value="Actions"/>		
Brace B DJO - Donjoy/BraceB456		UoM	PAR	On Hand	Outstanding	Qty Needed
DJO DIRECT		EA	0	0 of 0	0	0
		<input type="button" value="Nothing to Transfer"/>		<input type="button" value="Actions"/>		

Phase Out or Obsolete Replacement Items

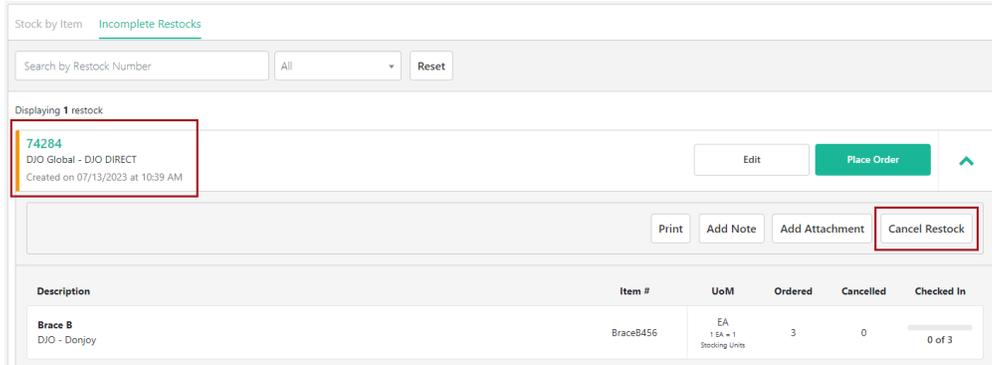
The Phase Out and Obsolete pills will still be visible on the Restock Form if the replacement product has been flagged with either status.

DJO Global - DJO DIRECT							Remove Vendor Site
Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Unit Price	Ext Price
Replacement Item Phase Out Brace B DJO - Donjoy	BraceB456	EA (1 Stocking Units)	0	3	3	0.00	0.00

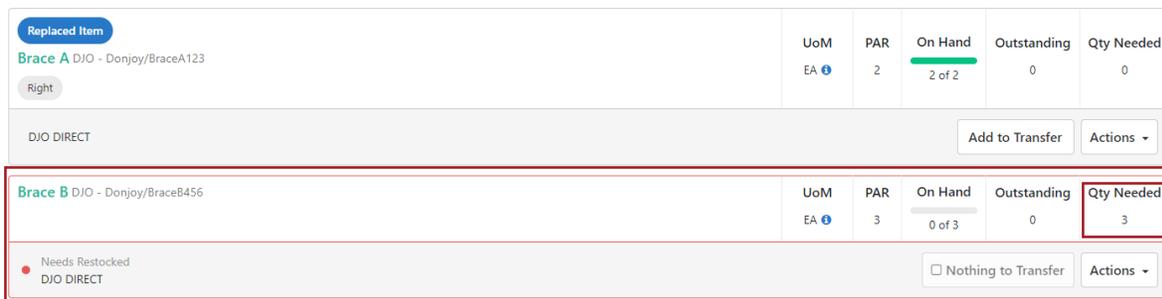
MANAGING REPLACEMENT ITEMS

Canceling Restocks

If a Created restock needs to be cancelled, and it includes a replacement item, the cancellation will work as expected. However, the replacement item, Brace B, will show a Quantity Needed value on the next Restock generated. In this example, Brace B on Restock 74284 is being cancelled.

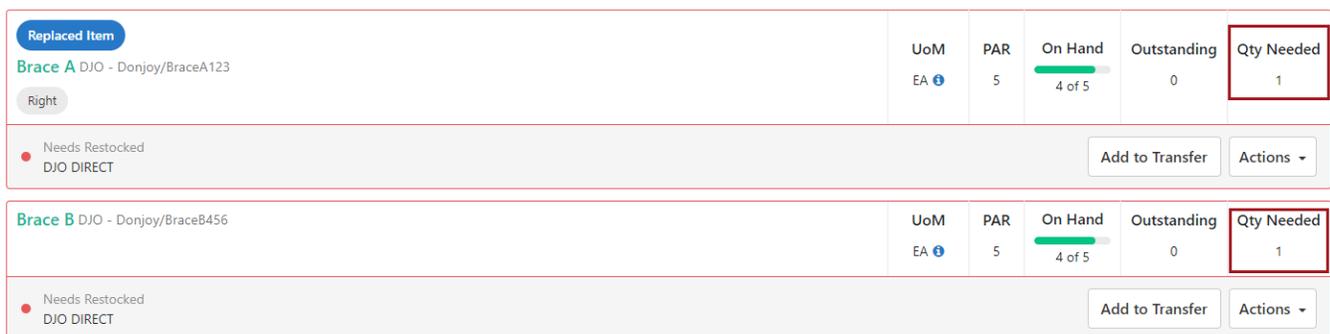


After Restock 74284 is cancelled, the Quantity Needed shows up under Brace B instead of Brace A. Clicking the Restock X button will show Brace B, but not as a replacement item. This happens because the Par Levels were adjusted as soon as the Restock was created.



Product Being Replaced and Replacement Item Need Restocked

If both products in the replacement process need restocked, the Restock process can be completed as usual. In this example both Brace A & Brace B need 1 item restocked.



MANAGING REPLACEMENT ITEMS

Product Being Replaced and Replacement Item Need Restocked (Continued)

Upon clicking the Restock button, both line items appear on the Restock Form. Proceed by Creating the restock.

Restock From Order

All products should be ordered directly from a vendor.

DJO Global - DJO DIRECT Remove Vendor Site

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Unit Price	Ext Price
Replacement Item Phase Out Brace B DJO - Donjoy	BraceB456	EA (1 Stocking Units)	0	1	1	0.00	0.00
Phase Out Brace B DJO - Donjoy	BraceB456	EA (1 Stocking Units)	4 of 5	1	1	0.00	0.00

SKU or Name...

Upon creation, both line items are combined into one line item for transmission to the vendor.

74285
DJO Global - DJO DIRECT
Created on 07/13/2023 at 10:55 AM

Edit Place Order

Print Add Note Add Attachment Cancel Restock

Description	Item #	UoM	Ordered	Cancelled	Checked In
Brace B DJO - Donjoy	BraceB456	EA 1 EA = 1 Stocking Units	2	0	0 of 2

Inventory Transfers

If products being replaced are added to an Inventory Transfer and not all of the on-hand quantity is being transferred, the Par Level will not automatically adjust. In this example, a quantity of 2 of 4 of Brace A are being transferred.

Reports Admin

Locations / Sports Orthopedic & Spine - Carlsbad

Carlsbad Edit Location

Stock by Item Incomplete Restocks

brace Needs Restock Reset

Displaying stock records 1 - 10 of 17 in total

Replaced Item	UoM	PAR	On Hand	Outstanding	Qty Needed
Brace A DJO - Donjoy/BraceA123 Right	EA	4	4 of 4	0	0
Brace B DJO - Donjoy/BraceB456	EA	6	4 of 6	2	0
Brace C DJO - Donjoy/BraceC789	EA	9	9 of 9	0	0

Items to Transfer

BraceA123
Brace A

Max: 4

From Sports Orthopedic & Spine - Carlsbad

Transfer To:
Sports Orthopedic & Spine - Vista

Cancel Transfer Place Transfer

MANAGING REPLACEMENT ITEMS

Inventory Transfers (Continued)

After the transfer, Brace A's on-hand decreases by 2 and is suggesting a restock of 2, because the Par Level did not decrease upon transfer. If these 2 items do not need to be replaced with Brace B, then adjust the Par Level of Brace A down by the quantity transferred.

Replaced Item Brace A DJO - Donjoy/BraceA123 Right		UoM EA	PAR 4	On Hand  2 of 4	Outstanding 0	Qty Needed 2
Needs Restocked DJO DIRECT			<input type="button" value="Add to Transfer"/>		<input type="button" value="Actions"/>	

Inventory Locations Restocking From a Warehouse

If the Inventory Location is set up to replenish product from a Warehouse location, the replacement item process has been disabled. Only Restocks being sent to a Vendor will show the replacement item on the Restock Form page.