

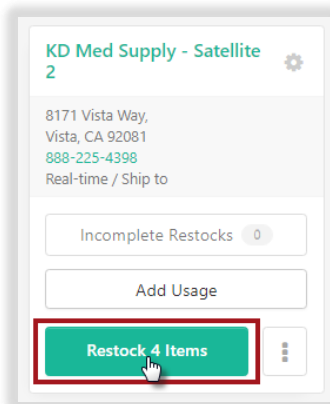
OVERVIEW OF WAREHOUSE FUNCTION

The Warehouse function allows accounts to efficiently process inventory from a main Warehouse to a Satellite location associated within the account.

1. **Processing Restock Orders at a Satellite Location**
2. **Processing Restock Orders at the Warehouse Location**
3. **Checking in a Warehouse Order at a Satellite Location**
4. **Managing Short Shipments at Warehouse Location**
5. **Ordering Direct from a Vendor at a Satellite Location**

1. Processing Restock Orders at a Satellite Location:

A Satellite Location can place an order to the Warehouse by selecting the Restock button on the Inventory Location page.



A list of the products to be ordered will display. The quantity available in the Warehouse is visible and the order quantity may be adjusted if needed. After the order has been reviewed, the restock is generated by selecting the “Create 1 Restock” button.

Restock From
KD Med Supply - Main

4 Items to replenish

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Warehouse Qty	
AirSelect Standard DIO - Aircast - Color: Chartrouise, Size: Small	01EF-S	EA (1 Stocking Units)	0 of 5	5	5	995	✕
AirSelect Standard DIO - Aircast - Size: Medium	01EF-M	EA (1 Stocking Units)	0 of 5	5	5	995	✕
AirSelect Standard DIO - Aircast - Size: Large	01EF-L	EA (1 Stocking Units)	0 of 5	5	5	995	✕
AirSelect Standard DIO - Aircast - Size: XLarge	01EF-XL	EA (1 Stocking Units)	0 of 5	5	5	995	✕

Select Vendor Site Add Vendor Site

Cancel

OVERVIEW OF WAREHOUSE FUNCTION

Once the order is placed an Awaiting Delivery message is displayed indicating the order is now pending at the Warehouse.

Note: Restocks can be cancelled by the Satellite or Warehouse location up until the time they are Pulled by a User in the Warehouse.

73961
 KD Med Supply - Satellite 2
 Created on 03/07/2022 at 11:44 AM

Ordered

Delivered

 Checked In

Awaiting Delivery

✓

2. Processing Restock Orders at the Warehouse Location:

The Warehouse Inventory location will display a Satellite Restocks button in addition to the Incomplete Restocks button currently associated with the Warehouse orders. To process orders received from Satellite select Satellite Restocks to display all pending Satellite orders.

KD Med Supply - Main

View Warehouse Info

Satellite Restocks 2
 Incomplete Restocks 0

Add Usage

Restock 0

A. The first step at the Warehouse to process a Satellite order is **Pull**.

73961
 KD Med Supply - Satellite 2
 Created on 03/07/2022 at 11:44 AM

Ordered
 Pulled
 Transferred
 Delivered
 Checked In

Pull

✓

Once Pull is selected, the Warehouse is able to preview the requested product and quantities for each order. Select the Set to Requested to auto-populate all requested quantities or manually adjusted quantities requested.

KD Med Supply - Satellite 1 2 Items

Set to Requested

Product	Item #	UoM	Quantity Available to Pull (UoM)	Quantity Requested to Pull (UoM)	Quantity to Pull (UoM)
AirSelect Standard DJO - Aircast - Size: Large	01EF-L	EA (1 Stocking Units)	995	2	0 Requested: 2 EA
AirSelect Standard DJO - Aircast - Color: Chartruese, Size: Small	01EF-S	EA (1 Stocking Units)	995	1	0 Requested: 1 EA

Cancel

Pull

OVERVIEW OF WAREHOUSE FUNCTION

- B. The second step at the Warehouse to process a Satellite is **Transfer**. Once the product is pulled and packed the Warehouse selects Transfer to decrement inventory from the Warehouse.

73961 0/3 checked in
KD Med Supply - Satellite 2
Created on 03/07/2022 at 11:44 AM

Ordered Pulled Transferred Delivered Checked In

Transfer

- C. The Final step at the Warehouse to process a Satellite order is **Deliver**.

73961 0/3 checked in
KD Med Supply - Satellite 2
Created on 03/07/2022 at 11:44 AM

Ordered Pulled Transferred Delivered Checked In

Deliver

3. Checking in a Warehouse Order at a Satellite Location

After the order has been processed and delivered, the order will remain under the Satellite tab in the Warehouse location until the Satellite location completes the **Check-In**.

73961 0/3 checked in
KD Med Supply - Satellite 2
Created on 03/07/2022 at 11:44 AM

Ordered Delivered Checked In

Check In

For the Satellite location, click **Check In** to view all products on the order. If all quantities and products were shipped and received, select Set All to Max and Check In. If a partial shipment was received each product can be manually adjusted to the quantity received and Check In. The order will remain open until all items have been Checked In.

KD Med Supply - Satellite 1 2 Items

Set All to Max

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Previously Checked In (UoM)	Quantity Open (UoM)	Quantity to Check In (UoM)
AirSelect Standard DJO - Aircast - Size: Large	01EF-L	EA (1 Stocking Units)	3 of 5	0	2	0 Max: 2
AirSelect Standard DJO - Aircast - Color: Chartruese, Size: Small	01EF-S	EA (1 Stocking Units)	4 of 5	0	1	0 Max: 1 EA

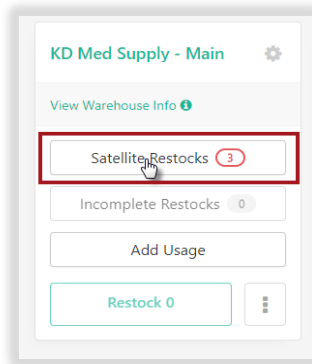
Cancel Check In

OVERVIEW OF WAREHOUSE FUNCTION

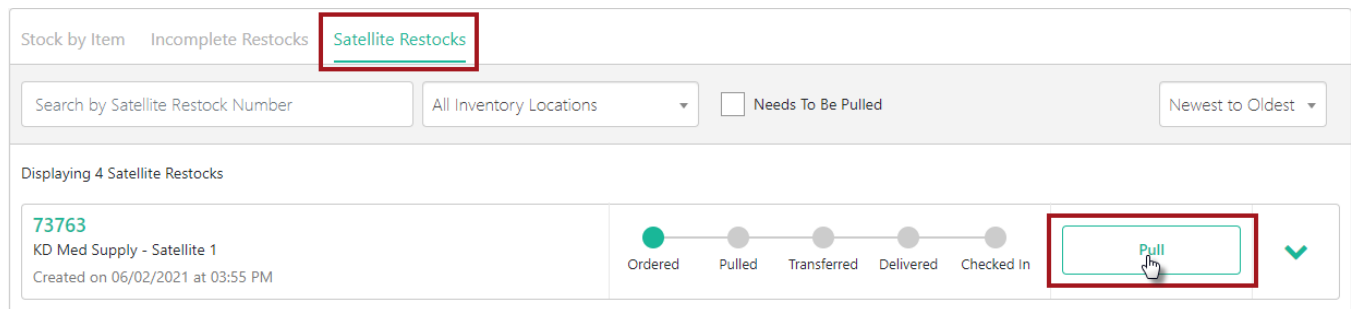
4. Managing Short Shipments at Warehouse Location

If the Warehouse is unable to fulfill the quantity requested from the Satellite location, the Warehouse can adjust the Quantity to the amount available. These quantity adjustments are completed when the restock is Pulled.

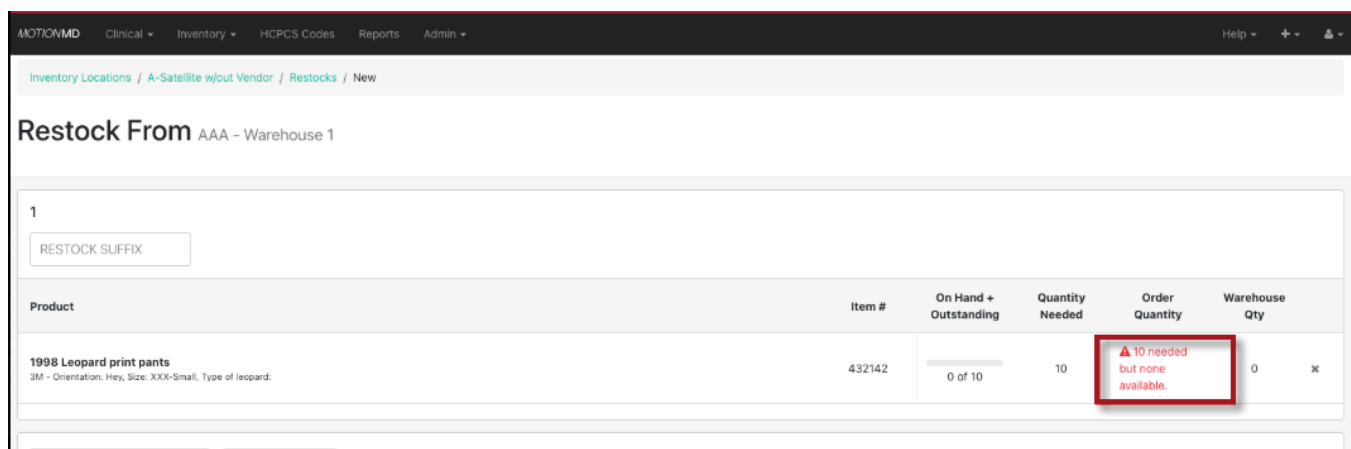
Select Satellite **Restocks** button from the Warehouse location.



Select the **Pull** button on the PO# for the Satellite location.



The Warehouse User can view the quantity available to pull from the Warehouse. If the quantity requested is greater than the quantity available, an error message will show.



OVERVIEW OF WAREHOUSE FUNCTION

The User can manually adjust the quantity prior to processing and pulling the order.

KD Med Supply - Satellite 3 4 Items Set to Requested

Product	Item #	UoM	Quantity Available to Pull (UoM)	Quantity Requested to Pull (UoM)	Quantity to Pull (UoM)
AirSelect Standard DJO - Aircast - Size Large	01EF-L	EA (1 Stocking Units)	0	5	0 <input type="text"/> Requested: 5
AirSelect Standard DJO - Aircast - Size Medium	01EF-M	EA (1 Stocking Units)	990	5	5 <input type="text"/> Requested: 5
AirSelect Standard DJO - Aircast - Color: Charhouse, Size: Small	01EF-S	EA (1 Stocking Units)	989	5	5 <input type="text"/> Requested: 5
AirSelect Standard DJO - Aircast - Size: Large	01EF-XL	EA (1 Stocking Units)	990	5	5 <input type="text"/> Requested: 5

Cancel Pull

After decreasing any stock quantities to be shipped by the Warehouse when it's Pulled, the PO is then processed through the remaining steps of Transfer and Deliver. Upon Check-In of the order at the Satellite location, the quantity received will automatically reflect the adjustment made by the Warehouse.

In the example below, the Warehouse only shipped 2 of the 5 requested. The User at the Satellite location will only see quantity 2 to Check In on the PO.

Check In 73761
Restock for KD Med Supply - Satellite 2 on 06/01/2021

Scan Item #

KD Med Supply - Satellite 2 2 Items Set All to Max

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Previously Checked In (UoM)	Quantity Open (UoM)	Quantity to Check In (UoM)
Air-Stirrup DJO - Aircast - Quantity: 1 PK, Size: Universal	02E	EA (1 Stocking Units)	4 of 4	0	4	0 <input type="text"/> Max: 4
AirSelect DJO - Aircast - Size: Large	01EF-L	EA (1 Stocking Units)	2 of 5	0	2	0 <input type="text"/> Max: 2

Cancel Check In

The remaining quantity of 3 will then appear in the Pending Restocks to be ordered once the next PO is generated for the Satellite location

Active KD Med Supply - Satellite 2 Edit Location

Restock 1 Items

Manual Restock

View All Restocks

View/Add Usage

Inventory Counts

Download Stock

Stock by Item Incomplete Restocks

Search... ☒ Needs Restock Reset

Displaying 1 stock record

Item	UoM	PAR	On Hand	Outstanding	Qty Needed
AirSelect Happy Don't Edit DJO - Aircast/01EF-L Large	EA	5	2 of 5	0	3

Needs Restocked

Add to Transfer Actions

OVERVIEW OF WAREHOUSE FUNCTION

5. Ordering Direct from a Vendor at a Satellite Location

When the Warehouse is out of stock or low on stock for an item, a Satellite location can be set up with the option to place an order directly with a vendor.

Generate the restocks for the items pending at the Satellite location. To the left of each SKU listed, Users will have the option to select the Convert to Vendor Order button for each product as needed. Once complete, select Create Restock to place the order direct to the vendor.

Restock From

KD Med Supply - Satellite 1

1 Items to replenish

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Warehouse Qty	
AirSelect Standard DIO - Aircast - Size: Medium	01EF-M	EA (1 Stocking Units)	0 of 10	10	<input type="text" value="10"/>	990	<div>Convert to Vendor Order</div>

Select Vendor Site

Add Vendor Site

Cancel

Create 1 Restock

ACO Med Supply - ACO Med Supply

Remove Vendor Site

Product	Item #	UoM	On Hand + Outstanding (Stocking Units)	Quantity Needed (UoM)	Order Quantity (UoM)	Unit Price	Ext Price	
AirSelect Standard DIO - Aircast - Size: Large	01EF-L	EA (1 Stocking Units)	3 of 5	2	<input type="text" value="2"/>	0.00	0.00	<div>×</div>

SKU or Name...

Q

Total Price: 0.00

Free Shipping Threshold: \$250.00

\$250.00 Until Free Shipping

Select Vendor Site

Add Vendor Site

Cancel

Create 1 Restock