

STOCK MANAGEMENT

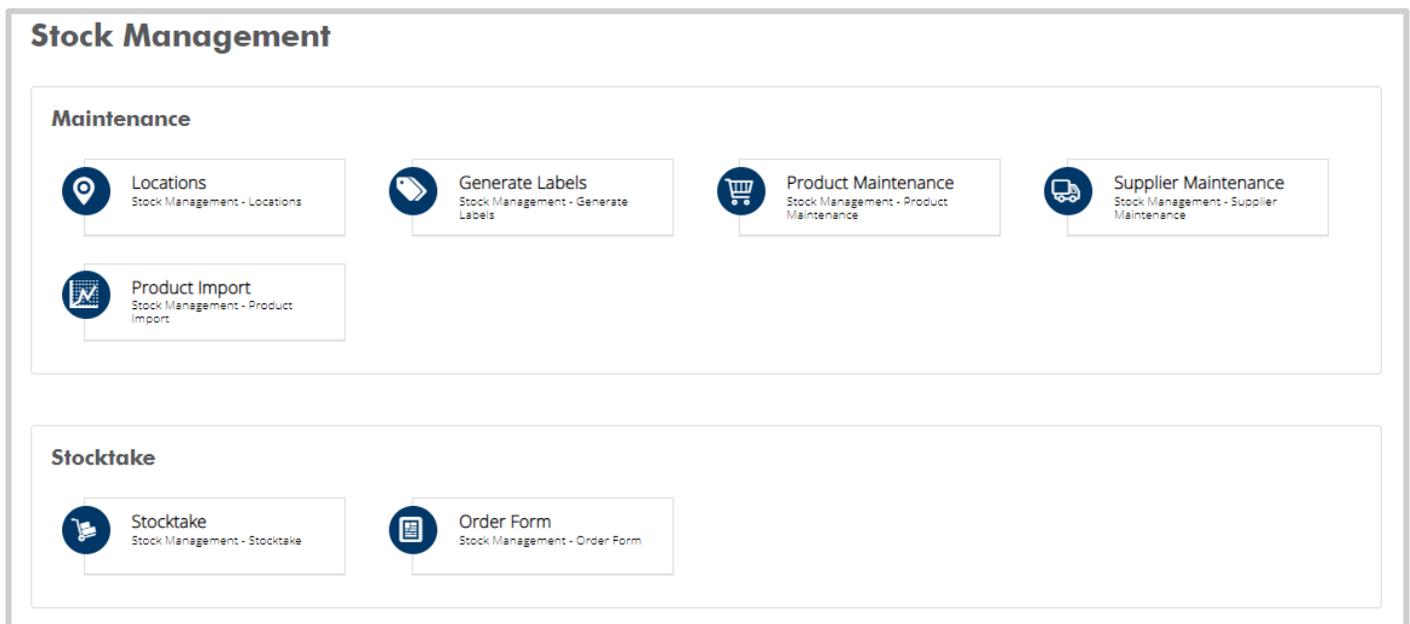
BY SSS AUSTRALIA

TABLE OF CONTENTS

MENU	1
SETTING UP YOUR STOCK MANAGEMENT	3
PREPARING THE STORAGE LOCATIONS	6
USING STOCK MANAGEMENT TO ORDER WITH OTHER SUPPLIERS.....	8
PERFORMING A STOCKTAKE.....	10
RAISING AN ORDER.....	13

MENU

The stock management menu screen is accessible through your dashboard once **Stock Management** has been activated on your account. It is comprised of two sections – maintenance and stocktake.



Maintenance

The maintenance section of the Stock Management dashboard is for maintaining stock locations, products, and suppliers.

- **Locations:** this is where you can add, remove, and maintain your stock locations and the inventory contained within them.
- **Generate Labels:** this is where you can create location labels for all your inventory. This allows you to conduct stocktakes utilising a barcode scanner, clearly labels your inventory storage locations so products are clearly identifiable, and their spots are clearly defined.

- Product Maintenance: this is where you can set maximum order quantity for your products. You can also add new products from suppliers other than SSS Australia.
- Supplier Maintenance: if you use Stock Management to maintain products and order products from other suppliers, you can manage those suppliers in this section.
- Product Import: you can use product import to upload your inventory and locations to the Stock Management tool quickly and easily.

Stocktake

The stocktake section of the Stock Management dashboard is where you go to conduct your stocktakes, and generate orders based off your stocktakes.

SETTING UP YOUR STOCK MANAGEMENT

You can set up your Stock Management tool utilising a CSV import, or manually setting up your locations and adding your products.

The first step in the process, regardless of which method you use, is to organise your inventory storage, decide on your desired shelf quantities so you can assign your reorder point, and label your storage areas so they are identifiable. Your SSS Australia Personal Account Manager can assist you through this process.

Locations

Decide how you would like to organise your locations. There are two levels of locations that are available to be utilised to organise your inventory. Think about how you might use the two levels to best organise your facility. We suggest setting up your locations by room, then within that, setting up the storage locations within the room.

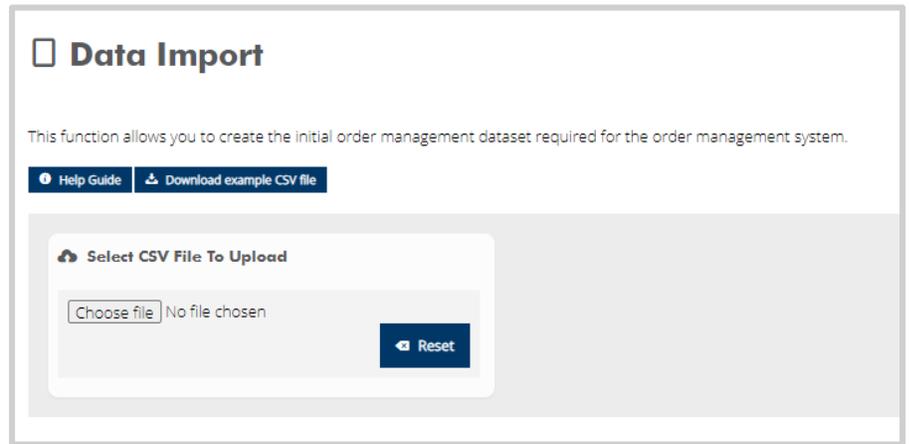
Treatment Room	Cupboard 1
	Cupboard 2
	Drawer 1
Doctor's Room 1	Cupboard 1
	Drawer 1
	Drawer 2

Product Import

Download: [Product Import Template](#)

By utilising the product import functionality to set up your Stock Management tool, you are able to set up your locations, load in your product lists, assign your reorder point (shelf quantity) and generate your label print queue.

This is the fastest method to set up your stock management tool.



Location	Sub Location	Product Code	Description	Reorder Point	Supplier	Generate Label
LEVEL 1	HALL CUPBOARD	1343475	Gammex Latex Powdered Gloves Sterile Size 8	3		yes
LEVEL 1	STERI ROOM	1183380	Multigate Sontara Mediclean All Purpose Towels 35 x 30cm	8		yes
LEVEL 1	STOCK ROOM	1401203	Glucose Solution 5% 500ml Viaflo	1		yes
MEDICATION	MEDICATION	1084963	Panadol Colour Free Suspension Strawberry 200ml 1-5 Years RD	1		yes
MEDICATION	MEDICATION	1263712	Panadol Child Colour Free Drops 20ml 1mth to 1 yr RD	1		yes

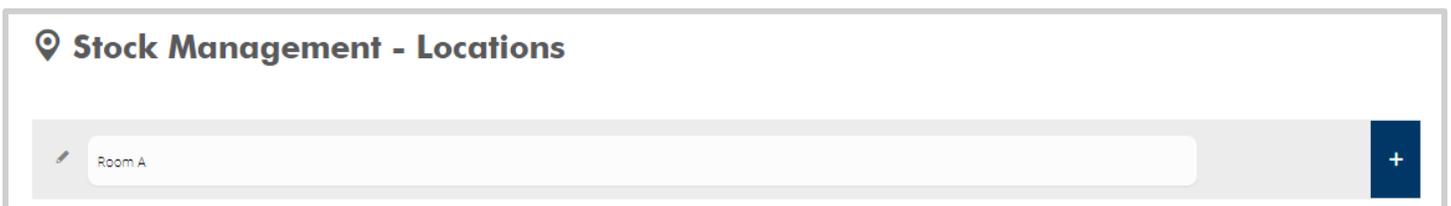
Simply download the attached product import template and fill in with your product locations and information. You can speed up this process by downloading your 6-month order history from your SSS Australia [reports dashboard](#).

Manual Set Up

Once you have decided on how you will manage your locations, you can go ahead and create them.

Step 1: Create Level 1 Location

To do this, simply type the name of the location into the field, and hit the blue + button on the right-hand side:



Step 2: Create Level 2 Locations that fall under level 1

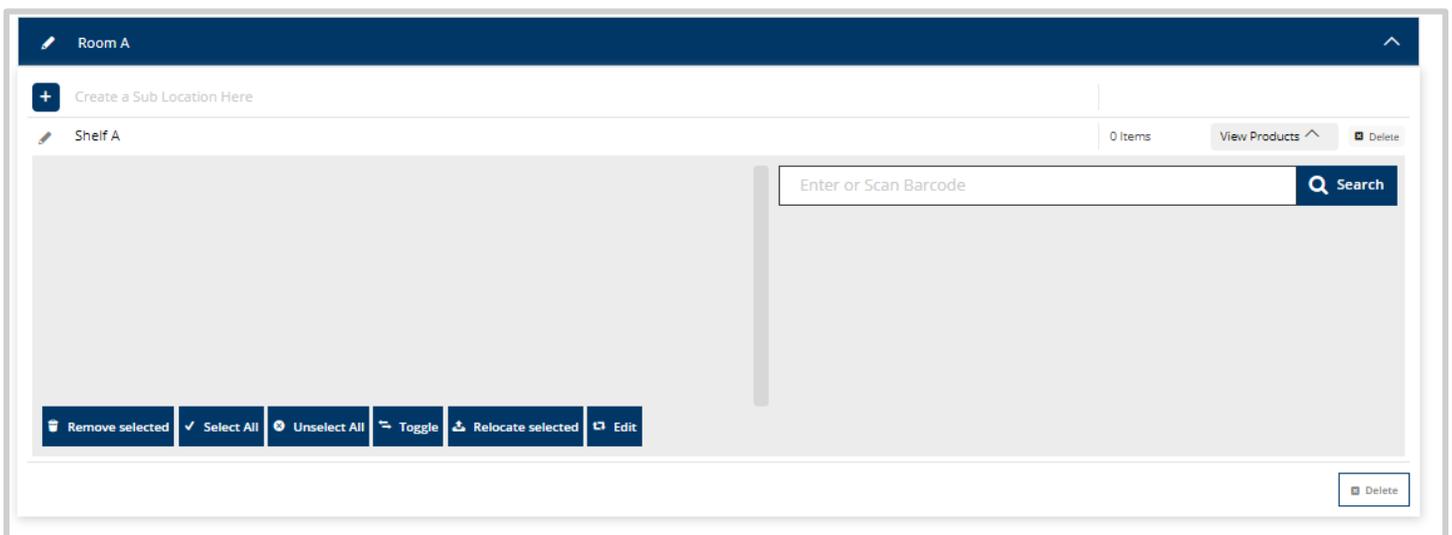
Once again, simply type the sub location name and click the save icon:



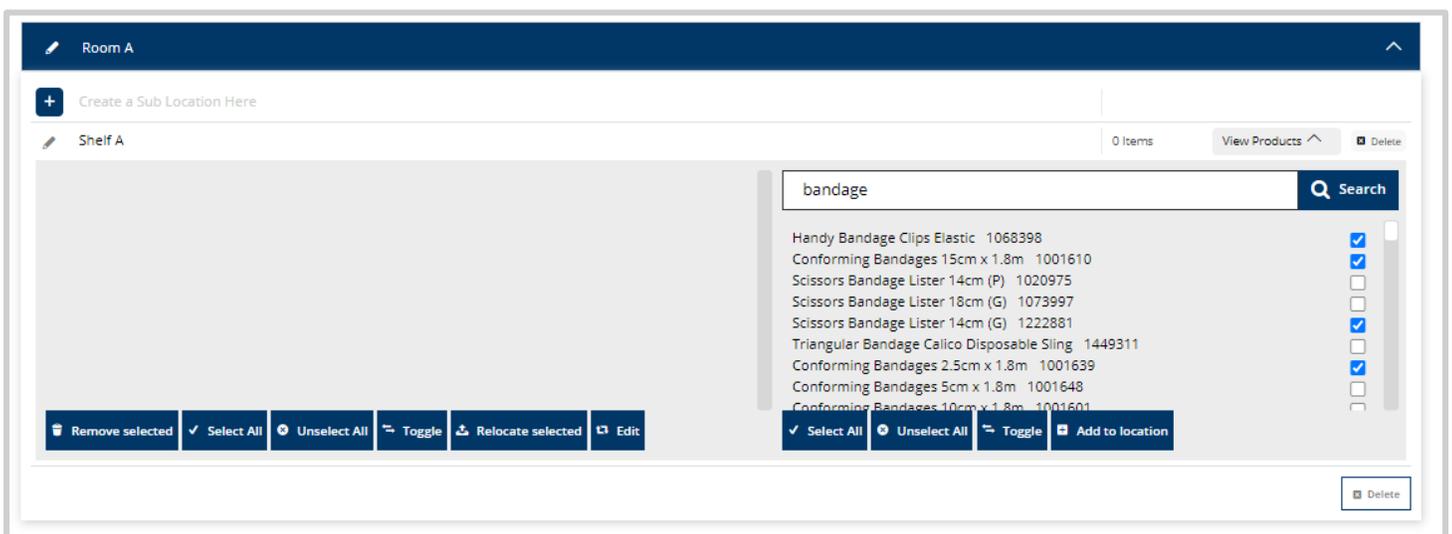
You can repeat this for as many Locations and Sub Locations you require.

Step 3: Add Products

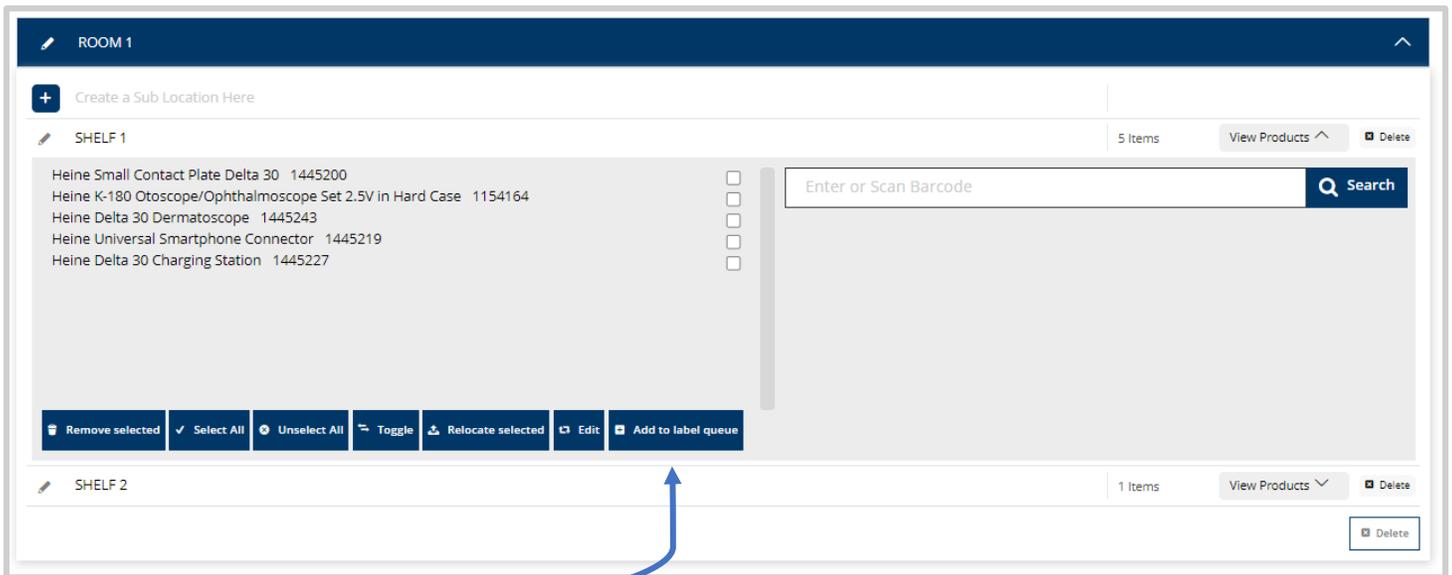
Once you have a sub location set up, you can begin to add products by clicking the "View Products" drop down and revealing the product management widget:



Just enter the SSS Australia item number or search for the product in the "Enter or Scan Barcode" field and select the product/s you would like to add to the location, then hit "add to location."



When you add your selected products to your location, it will then look like this:



Generate Labels

Once you have added a product to a location, you can then add products to the label queue. Simply select all the products you would like to print a label for, then hit "Add to Label Queue".

Once you have created all your locations and added all your products to the label queue, you can move forward to printing your labels.

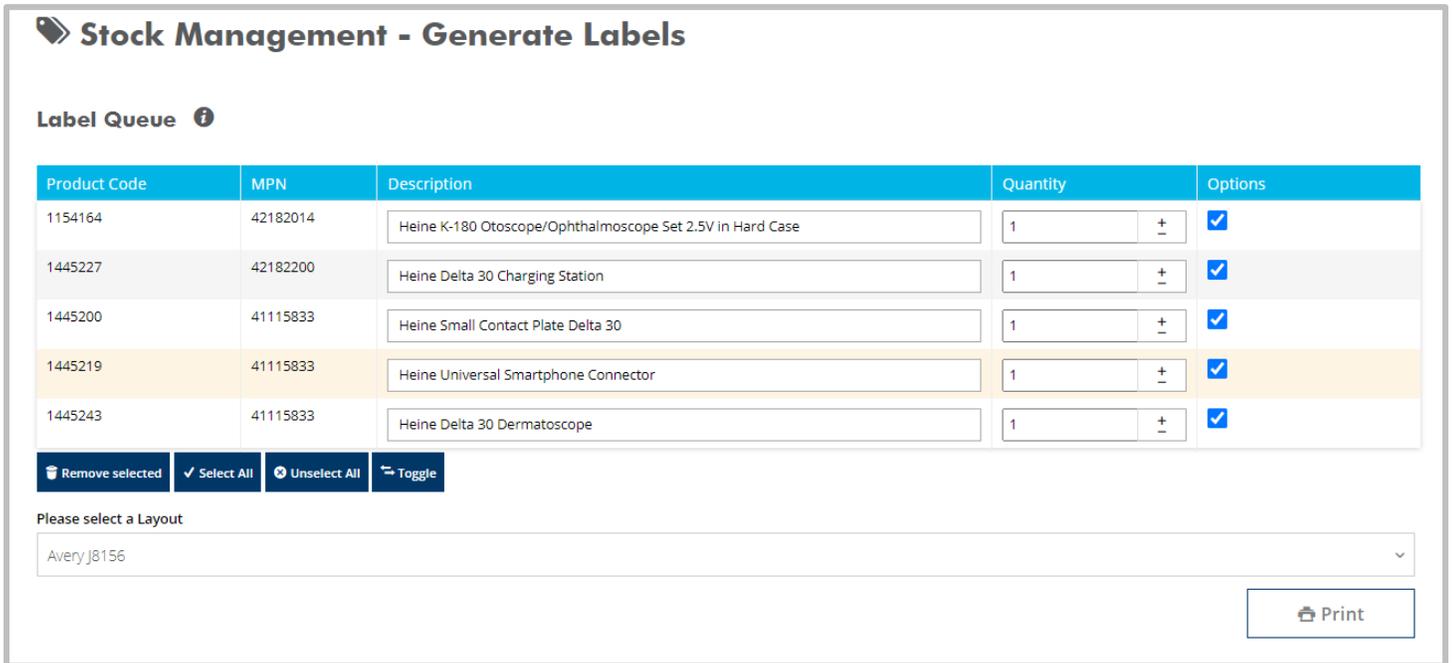
PREPARING THE STORAGE LOCATIONS

Now that your stock system is set up, you can move on setting up your physical inventory storage.

Print Labels

After you have added all your products to the label queue while you were setting up your stock management, you can now go to print your labels. From the main menu, select [Generate Labels](#). You should see your list of products.

Select the products you would like to print a label for, choose your label size, and hit print.



Stock Management - Generate Labels

Label Queue ⓘ

Product Code	MPN	Description	Quantity	Options
1154164	42182014	Heine K-180 Otoscope/Ophthalmoscope Set 2.5V in Hard Case	1	<input checked="" type="checkbox"/>
1445227	42182200	Heine Delta 30 Charging Station	1	<input checked="" type="checkbox"/>
1445200	41115833	Heine Small Contact Plate Delta 30	1	<input checked="" type="checkbox"/>
1445219	41115833	Heine Universal Smartphone Connector	1	<input checked="" type="checkbox"/>
1445243	41115833	Heine Delta 30 Dermatoscope	1	<input checked="" type="checkbox"/>

Please select a Layout

Avery J8156

Standard label: Avery J8156

<https://www.averyproducts.com.au/product/quick-peel-address-labels-sure-feed-936060>

Print your labels out and affix them to your inventory locations within your facility.

Set Your Stock Levels

To raise orders off the back of completing a stocktake, you will need to set your “max order quantity”. This is done in the [Product Maintenance](#) section of stock management. Simply navigate to Product Maintenance, scan the barcode or search for the product you are dealing with, hit edit, and then input the maximum order quantity. Make sure you save changes before moving on to the next product.

Stock Management - Product Maintenance

ADD NEW PRODUCT



1154164



Both



Search

Showing 1 result(s) for search term 1154164

1154164 Heine K-180 Otoscope/Ophthalmoscope Set 2.5V in Hard Case Edit

Active

Save Changes

Cancel Edit

Product Description:
Heine K-180 Otoscope/Ophthalmoscope Set 2.5V in Hard Case

Maximum Order Quantity: + -

Product Managed By: Supplier

GST Free: No

Product Code: 1154164 / 42182014

Unit of Measure: Each

Supplier	Unit Price Ex	Unit Price Inc	Options
Please Select	<input type="text" value="0"/>	<input type="text" value="0"/>	≡+ Add

SSS Australia 745.45 820.00

Remove Selected Save

The maximum order quantity should be the quantity of that item you would like to keep on the shelf, or your par level. When you complete your stocktake, and have on hand less than this quantity, the stock management tool will add the deficit to your order. Do not worry, before your order is placed, you will be able to edit your order quantities.

USING STOCK MANAGEMENT TO ORDER WITH OTHER SUPPLIERS

SSS Australia's stock management tool allows you to add other suppliers' products so you can include them in your stocktakes and even generate PDF and CSV orders.

Add Other Suppliers

From the main menu, go to [Supplier Maintenance](#), then just add your suppliers by giving them a supplier code and description, then hit the blue plus.

Stock Management - Supplier Maintenance

Use this screen to create / update your own supplier information

OM Office Max +

office Search

Showing 1 result(s) for search term office

Supplier Code:	ow	Description:	Office Works	<input checked="" type="checkbox"/>
----------------	----	--------------	--------------	-------------------------------------

Add Non-SSS Australia Products

Once you have added your other suppliers in the supplier maintenance section, you can add the products. From the main menu, go to [Product Maintenance](#). At the top there is an option for you to add a new product. Simply hit the blue plus sign to drop down the add new product widget:

ADD NEW PRODUCT +

Product Code: 123456

Manufacturer Part Number: 987644

Product Description: A4 White Paper Reams

Maximum Order Quantity: 10 ±

Unit Of Measure: Each

GST Free: No

Fire Hazard:

Refrigerate:

Rotation Required:

Partial Count Required:

Active:

Save Changes

Cancel Edit

Suppliers

Supplier information is available in Edit Mode

Once you have saved your new product, you will then need to search for that product and edit it to add the supplier:

1234567 x Both Search

Showing 1 result(s) for search term 1234567

1234567 A4 White Paper Reams Edit

Once you have opened the product for editing, you will be able to add the supplier and the pricing information. Make sure you hit the blue ADD button before saving:

Showing 1 result(s) for search term 1234567

1234567 A4 White Paper Reams Edit



Product Description:
A4 White Paper Reams

Maximum Order Quantity: 10 GST Free: No

Product Code: 1234567 / 987644 Product Managed By: User

Unit of Measure: Each

Supplier	Unit Price Ex	Unit Price Inc	Options
Office Works	10	11.00	=+ Add

x Remove Selected Save

- Fire Hazard
- Refrigerate
- Rotation Required
- Partial Count Required
- Active

Save Changes

x Cancel Edit

Once you had added the products from other suppliers, you will then be able to add them to your locations, print labels for them, and include them in your stocktakes.

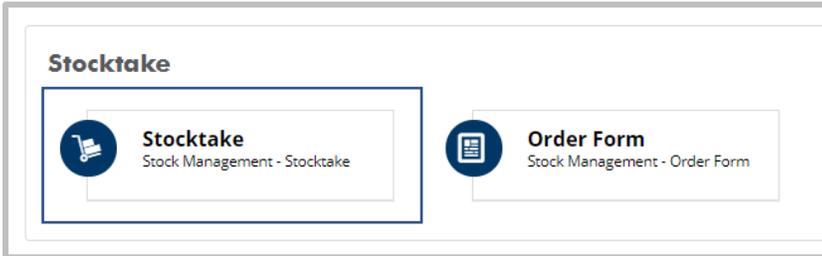
PERFORMING A STOCKTAKE

Once your Stock Management Tool is set up and operational, you will then be ready to complete your first stocktake.

We recommend using a barcode scanner to assist you in the process of conducting your stocktakes. It will make the process much quicker, and much more accurate, however it is not necessary.



Example: [POS-mate Barcode Scanner \\$199 from OfficeWorks](#)

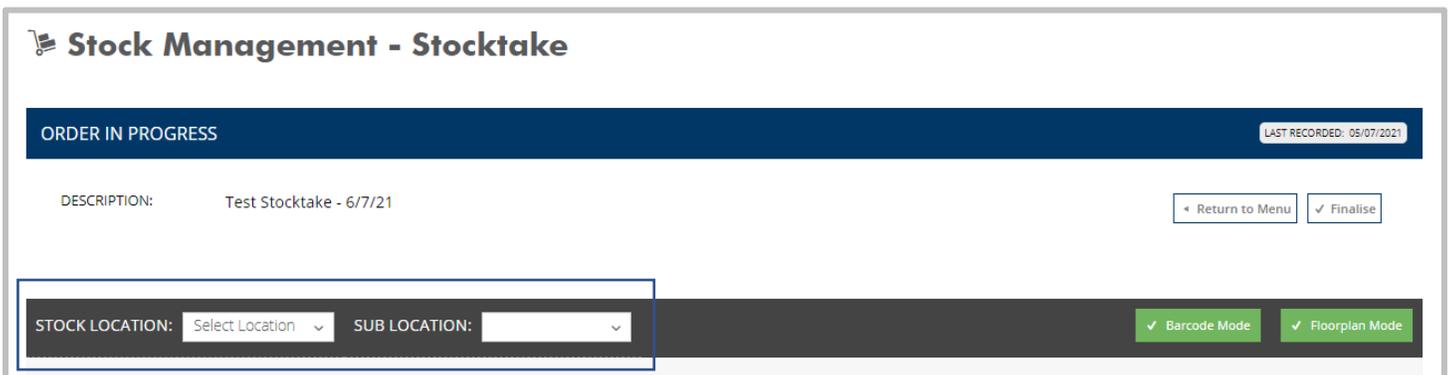


To start your stocktake, select the Stocktake option from your main menu.



Name your Stocktake and click start stocktake.

You now can work through your stock locations and sub locations one by one to perform your stock counts.



You have two options for how you conduct your count: barcode mode or floorplan mode. If you are using a barcode scanner, we recommend using barcode mode, however if you are not using a barcode scanner, floorplan mode would be better for you.

Barcode Mode

STOCK LOCATION: ROOM 1 SUB LOCATION: SHELF 1

✓ Barcode Mode ✓ Floorplan Mode

LAST SCANNED PRODUCT

STATUS: Ready. Please Scan The Item...

Scan Barcode

Scan barcode here

Product:

Product Description:

Product Quantity: 1

Clear

Save

When using barcode mode, you can either:

- Scan the barcode of the item you are counting the number of times equal to how many of that product you set in have in stock, or
- Scan the barcode of the item you are counting once, then type the product quantity and press save.

Floorplan Mode

STOCK LOCATION: ROOM 1 SUB LOCATION: SHELF 1

✓ Barcode Mode ✓ Floorplan Mode

PRODUCTS IN CURRENT LOCATION:

Edit Floorplan

Heine Small Contact Plate Delta 30

W.A LED Macroview & Coaxial Set with L-ion Handle & Charger

SSS AUSTRALIA MEDICAL SUPPLIES

A4 White Paper Reams

Heine K-180 Otolaryngoscope/Ophthalmoscope Set 2.5V in Hard Case

Heine Delta 30 Dermatoscope

Heine Universal Smartphone Connector

MPN: 41115833 CODE: 1445200 SUPPLIER: SSS Australia UNIT: Each

MPN: 42182014 CODE: 1364960 SUPPLIER: SSS Australia UNIT: Each

MPN: 987644 CODE: 1234567 SUPPLIER: Office Works UNIT: null

MPN: 42182014 CODE: 1134164 SUPPLIER: SSS Australia UNIT: Each

MPN: 41115833 CODE: 1445243 SUPPLIER: SSS Australia UNIT: Each

MPN: 41115833 CODE: 1445219 SUPPLIER: SSS Australia UNIT: Each

20

Save

Heine Small Contact Plate Delta 30

MPN: 41115833
CODE: 1445200
SUPPLIER: SSS Australia
UNIT: Each

20

Save

In floorplan mode, simply input your stock counts for each product and press save. In floorplan mode, you can also reorder the products using the 'Edit Floorplan' button.

Regardless of which count style you are using, when you finish counting in a location, simply move on to your next location:

STOCK LOCATION: ROOM 1 ▾ SUB LOCATION: SHELF 1 ▾

Select Location

SHELF 1

SHELF 2

7

✓ Finalise

When you have finished counting all locations, return to the top of the page and select

If you have not counted all stock in all locations, the stock management system will give you an overview highlighting where you have not counted:

Missed something?					
Location	Sub Location	Total Products	Counted	Outstanding	Option(s)
ROOM 1	SHELF 1	7	1	6	View
ROOM 1	SHELF 2	1	0	1	View
ROOM 2	SHELF 1	2	0	2	View
ROOM 2	SHELF 2	2	0	2	View
ROOM 3	SHELF 1	3	0	3	View
ROOM 3	SHELF 2	4	0	4	View

Cancel Review

You will then need to view by location, or you can choose to review the whole list of uncounted items. If you want to leave those products uncounted, just continue through and confirm you want to continue with some products uncounted.

RAISING AN ORDER

Once you have completed a stocktake, you will then be able to raise orders off the back of this count. You can do this through either the Order Form or through the Stocktake screen. Simply hit the  button on the stocktake you are wanted to raise your orders from.

On this screen you can edit the supplier, the max stock level, and the amount you want to order on this order. Be careful when editing the max stock level because this will update that product's par level indefinitely. If you just want to change how many of an item you are ordering on this order, do so using the order qty field.

Don't forget to consider items that are supplied in box, pack or carton quantities may still require an order be placed against them depending on how many units you have on hand. If a "partial count" is required for the item, you will see this icon: 



Once you are happy with your order quantities, click

i Order Quantity is calculated initially based on the difference the pre-set stock level (how many you want to keep on hand) and Stock Count in the selected order

i Order Quantity can be overwritten by adjusting the Order Quantity entry box

Sort  Shows first product scanned first

Description	Product Code	Supplier	Stock On Hand	Location	Sub Location	Max Stock Level	Back Order*	Order Qty	Unit Price	Line Amount	
Heine Universal Smartphone	1445219	SSS Australia	1	ROOM 1	SHELF 1	6	0	5	99.00	\$495.00	
W.A LED Macroview &	1364960	SSS Australia	1	ROOM 1	SHELF 1	3	0	2	799.50	\$1,599.00	
W.A LED Macroview &	1364960	SSS Australia	1	ROOM 1	SHELF 2	3	0	2	799.50	\$1,599.00	
Pregnancy Test Innovacon HCG	1289373	SSS Australia	1	ROOM 2	SHELF 1	1	0	0	39.20	\$0.00	
Nitrasoft Nitrile Powder Free	1434241	SSS Australia	1	ROOM 2	SHELF 1	4	0	3	45.00	\$135.00	
W.A D566 Sphygmomanomet	1222101	SSS Australia	1	ROOM 2	SHELF 2	3	0	2	165.10	\$330.20	
W.A ProBP 2000 Digital BP Device	1407821	SSS Australia	1	ROOM 2	SHELF 2	2	0	1	227.85	\$227.85	
Prepswab S&N Remove Wipes	1092769	SSS Australia	1	ROOM 3	SHELF 1	2	0	1	26.05	\$26.05	
Surgical Face Mask Ear Loop 3	1430807	SSS Australia	1	ROOM 3	SHELF 1	3	0	2	12.50	\$25.00	
Povidone Iodine Swabs 60 x 33mm	1327208	SSS Australia	1	ROOM 3	SHELF 1	1	0	0	15.05	\$0.00	
Medstock Fabric Island Dressing 7	1384406	SSS Australia	1	ROOM 3	SHELF 2	1	0	0	19.70	\$0.00	
Medstock Silicone Foam Dressing	1384716	SSS Australia	1	ROOM 3	SHELF 2	1	0	0	17.41	\$0.00	

SHOWING 1 TO 19 OF 19



TOTAL PRODUCTS:
TOTAL 1 PAGE(S)





All prices shown are exclusive of GST

If you have products from multiple suppliers included in your order, you will see all of the suppliers and the order values listed.

Current order: **Test Stocktake - 7/7/21**

Supplier Name	Order Value	Options
SSS Australia	\$6,139.72	Create Order
Office Works	\$99.00	Create Order

[← Review order quantity / price](#)

Raising your SSS Australia Order

All you need to do to raise your SSS Australia order is hit the create order button.

Then to continue, simply click the copy items to cart button. If you currently have items in your cart, you will be able to place that order on hold for you to access later. You can find orders on hold in your [dashboard here](#).

Your order will be transferred to your shopping cart. You will have your last chance to make amendments to the order here. If your organization utilizes order approvals, you can include notes to your approver on the line items, plus add other products using fast order entry.

Continue through the checkout as you normally would and place your order.

Current order: **Test Stocktake - 7/7/21**

[← Back To Suppliers](#)

Create Order For SSS Australia

You have selected to create an order for supplier SSS Australia

Orders for this supplier will be added to your web order directly and you can checkout as normal.

The order reference will be set to the name of the order Test Stocktake - 7/7/21

All location information will be added to the order as a note line to make this easier for unpacking

NB: Any items in your existing cart will be placed on hold

[Copy Items to Cart](#)

Raising your order with other suppliers

For suppliers other than SSS Australia, you will be able to download your order in CSV or PDF format.

Create PDF Or CSV Orders For Third Party Suppliers

Chosen Supplier: Office Works

Download Format

[CSV](#)

[PDF](#)

When you select CSV, the download will look like this:

	A	B	C	D	E	F
1	ProductCode	Description	Quantity	UnitDescription	UnitPrice	ExtendedPrice
2						
3	1234567	A4 White Paper Reams	10	Each	10	100

The CSV option would be great for suppliers that allow for CSV order upload.

When you select PDF, you will be able to add information like Order Reference, Deliver to name and address, Delivery Instructions, Contact name and Contact phone, so the PDF can serve as a purchase order. The final PDF will look like this:

Purchase Order Form

PURCHASE ORDER: 123456

Deliver to:
Test Person
123 Fake Street
Fake Suburb Test 1234

Supplier Information:
Supplier Code: OW
Supplier Name: Office Works

Contact: Test **Phone:** Test **Date:** 05/Jul/21 **Page:** 1 of 1

Product Code	Description	Quantity	Unit	Unit Price (ex GST)	Extended Price (ex GST)
1234567	A4 White Paper Reams	10	Each	\$10.00	\$100.00

Delivery instructions:
Test

Total **\$100.00**
All prices are exclusive of GST