USING THE INVENTORY MANAGEMENT SPREADSHEET

EFFECTIVE COST CONTROL

WHY DO WE CARE ABOUT MANAGING INVENTORY?

- Working capital
  - Inventory is product that can’t be billed to a patient
  - Money is “tied up” in inventory
- Overstock hazards
  - Products can wear out or expire
  - Damaged or stolen product
  - Storage space
  - More difficult to count
- Avoiding stockouts
  - Impact on patients

Item Number	Description	Vendor	Stock Check Date	Number In Stock	Reorder	Qty Above/Below Reorder
TNSGCWGC00PRI	GuttaCore for W1G-PRI	Dentsply				
RIBTIPS	Mix Intra Oral Tips	Dentsply				
PROLUBE	Prolube	Dentsply				
RIBBON	Ribbon RCT Sealer	Dentsply				
VOS301216	Vortex Orifice Opener 30.12/16	Dentsply				
WGLARGE25	WaveOne Gold Large 25mm	Dentsply				
WGLARGE31	WaveOne Gold Large 31mm	Dentsply				
WGMEDIUM21	WaveOne Gold Med 21mm	Dentsply				
WGMEDIUM25	WaveOne Gold Med 25mm	Dentsply				
WGMEDIUM31	WaveOne Gold Med 31mm	Dentsply				
WGPRIME21	WaveOne Gold Primary 21mm	Dentsply				
WGPRIME25	WaveOne Gold Primary 25mm	Dentsply				
WGPRIME31	WaveOne Gold Primary 31mm	Dentsply				
WGSMALL21	WaveOne Gold Small 21mm	Dentsply				
568713	Accudent Syringe Material	Goetze				
568712	Accudent Tray Material	Goetze				
575295	Advance Temp C&B Refill A1	Goetze				
575296	Advance Temp C&B Refill A2	Goetze				
552855	Alcohol Isopropyl 70% Gal	Goetze				

This is the date you counted the item. All items do not have to be counted on the same day!

INVENTORY FIELDS

Item Number	Description	Vendor	Stock Check Date	Number In Stock	Reorder	Qty Above/Below Reorder
TNSGCWGC00PRI	GuttaCore for W1G-PRI	Dentsply				
RIBTIPS	Mix Intra Oral Tips	Dentsply				
PROLUBE	Prolube	Dentsply				
RIBBON	Ribbon RCT Sealer	Dentsply				
VOS301216	Vortex Orifice Opener 30.12/16	Dentsply				
WGLARGE25	WaveOne Gold Large 25mm	Dentsply				
WGLARGE31	WaveOne Gold Large 31mm	Dentsply				
WGMEDIUM21	WaveOne Gold Med 21mm	Dentsply				
WGMEDIUM25	WaveOne Gold Med 25mm	Dentsply				
WGMEDIUM31	WaveOne Gold Med 31mm	Dentsply				
WGPRIME21	WaveOne Gold Primary 21mm	Dentsply				
WGPRIME25	WaveOne Gold Primary 25mm	Dentsply				
WGPRIME31	WaveOne Gold Primary 31mm	Dentsply				
WGSMALL21	WaveOne Gold Small 21mm	Dentsply				
568713	Accudent Syringe Material	Goetze				
568712	Accudent Tray Material	Goetze				
575295	Advance Temp C&B Refill A1	Goetze				
575296	Advance Temp C&B Refill A2	Goetze				
552855	Alcohol Isopropyl 70% Gal	Goetze				

INVENTORY FIELDS

The number in stock on the day you counted. Unopened packages should be entered as the quantity in the package. Many items can be estimated (such as a partial box of gloves).

Only count items in storage, not in use at chairs.

Item Number	Description	Vendor	Stock Check Date	Number In Stock	Reorder	Qty Above/Below Reorder
TNSGCWGC00PRI	GuttaCore for W1G-PRI	Dentsply				
RIBTIPS	Mix Intra Oral Tips	Dentsply				
PROLUBE	Prolube	Dentsply				
RIBBON	Ribbon RCT Sealer	Dentsply				
VOS301216	Vortex Orifice Opener 30.12/16	Dentsply				
WGLARGE25	WaveOne Gold Large 25mm	Dentsply				
WGLARGE31	WaveOne Gold Large 31mm	Dentsply				
WGMEDIUM21	WaveOne Gold Med 21mm	Dentsply				
WGMEDIUM25	WaveOne Gold Med 25mm	Dentsply				
WGMEDIUM31	WaveOne Gold Med 31mm	Dentsply				
WGPRIME21	WaveOne Gold Primary 21mm	Dentsply				
WGPRIME25	WaveOne Gold Primary 25mm	Dentsply				
WGPRIME31	WaveOne Gold Primary 31mm	Dentsply				
WGSMALL21	WaveOne Gold Small 21mm	Dentsply				
568713	Accudent Syringe Material	Goetze				
568712	Accudent Tray Material	Goetze				
575295	Advance Temp C&B Refill A1	Goetze				
575296	Advance Temp C&B Refill A2	Goetze				
552855	Alcohol Isopropyl 70% Gal	Goetze				

INVENTORY FIELDS

Once we can establish a pattern of usage (i.e. 10 boxes of gloves per month), we can set a reorder point.

If you wish to do this, I will help you.

Item Number	Description	Vendor	Stock Check Date	Number In Stock	Reorder	Qty Above/Below Reorder
TNSGCWGC00PRI	GuttaCore for W1G-PRI	Dentsply				
RIBTIPS	Mix Intra Oral Tips	Dentsply				
PROLUBE	Prolube	Dentsply				
RIBBON	Ribbon RCT Sealer	Dentsply				
VOS301216	Vortex Orifice Opener 30.12/16	Dentsply				
WGLARGE25	WaveOne Gold Large 25mm	Dentsply				
WGLARGE31	WaveOne Gold Large 31mm	Dentsply				
WGMEDIUM21	WaveOne Gold Med 21mm	Dentsply				
WGMEDIUM25	WaveOne Gold Med 25mm	Dentsply				
WGMEDIUM31	WaveOne Gold Med 31mm	Dentsply				
WGPRIME21	WaveOne Gold Primary 21mm	Dentsply				
WGPRIME25	WaveOne Gold Primary 25mm	Dentsply				
WGPRIME31	WaveOne Gold Primary 31mm	Dentsply				
WGSMALL21	WaveOne Gold Small 21mm	Dentsply				
568713	Accudent Syringe Material	Goetze				
568712	Accudent Tray Material	Goetze				
575295	Advance Temp C&B Refill A1	Goetze				
575296	Advance Temp C&B Refill A2	Goetze				
552855	Alcohol Isopropyl 70% Gal	Goetze				

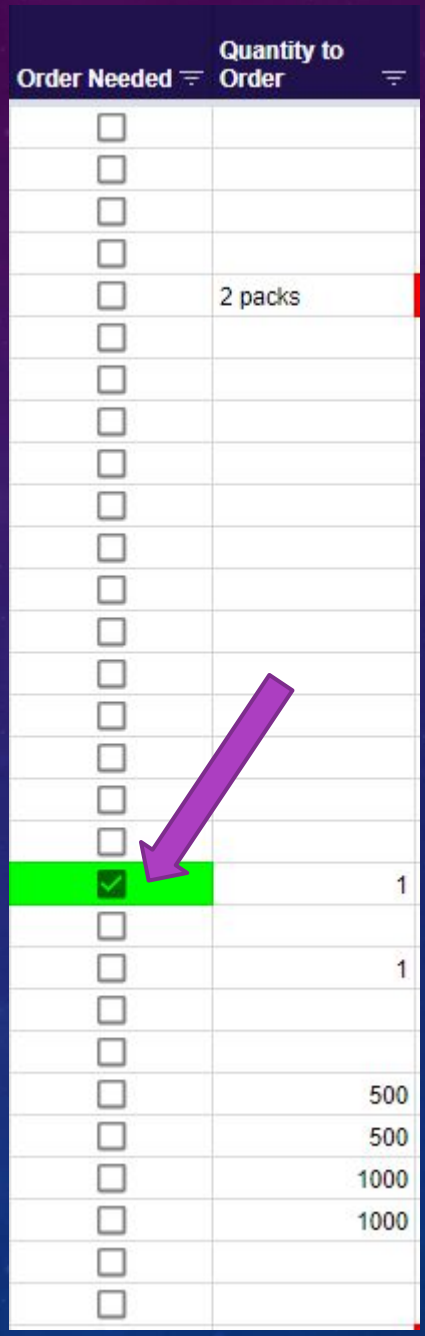
INVENTORY FIELDS

When your inventory reaches the reorder point, it is time to order. This is an automatic calculation that shows you whether you are above or below your reorder point. If you frequently go below your reorder point before your next order, we need to reset the reorder point.

If you wish to do this, I will help you.

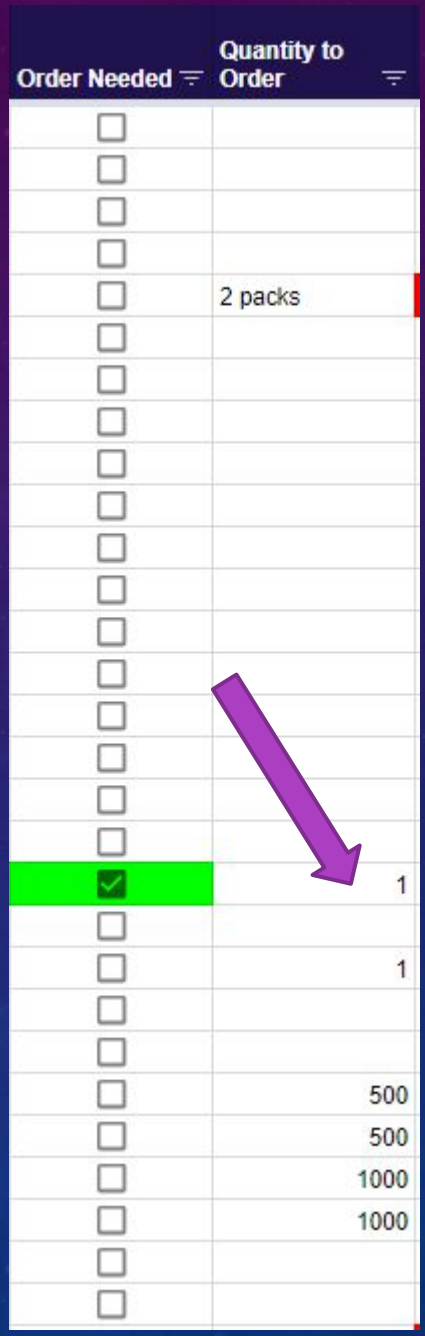
REQUESTING ORDERS

Whether or not you use the inventory fields, if you want to order an item, check the “order needed” box for the item. Note that the background turns green.



REQUESTING ORDERS

Put the quantity you want to order in this column.



RECEIVING ORDERS

When the order is placed, the “order needed” checkbox will be unchecked and the “on order” checkbox will be checked. Note the background turns red.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

When the order is placed, the date the order is placed will be entered in the “last order” column.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

The quantity ordered is entered as “eaches” (the total number of items, not packs or boxes).

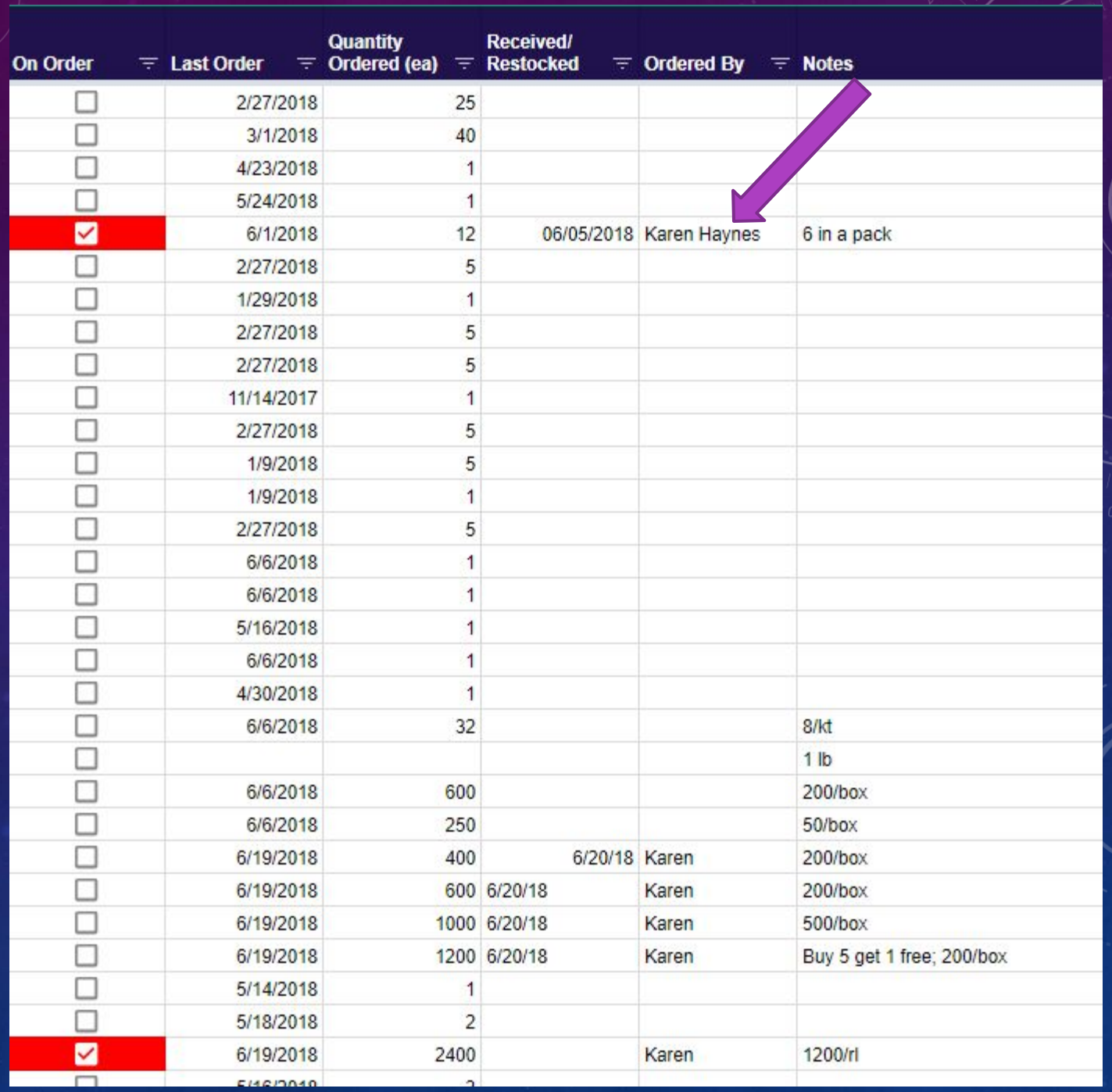
This may differ from the quantity requested due to previous order history order (if quantity requested appears to be more than a month’s worth) or if there is a special offer on that item.

Also, the product may be ordered from a different vendor (only exact same item, no substitutions) for cost savings or special offer availability.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

This is the name of the person who placed the order. This is who you should contact if you have any issues when you receive the order.



On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

When the order arrives, verify the item and quantity received. You can put the date, as shown here, or you can put your name, the quantity received, or any other information that is useful to your office.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

When the order arrives, if you receive the entire order, uncheck this box.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/ /2018	25			
☐	/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
☐					1 lb
☐	6/6/2018	600			200/box
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

RECEIVING ORDERS

If you do not receive your entire order, please make a note here as to the quantity that was missing. Do not uncheck the “on order” box. This will enable you to easily see if you’re still waiting on something so you don’t double-order.

On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
☐	2/27/2018	25			
☐	3/1/2018	40			
☐	4/23/2018	1			
☐	5/24/2018	1			
☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
☐	2/27/2018	5			
☐	1/29/2018	1			
☐	2/27/2018	5			
☐	2/27/2018	5			
☐	11/14/2017	1			
☐	2/27/2018	5			
☐	1/9/2018	5			
☐	1/9/2018	1			
☐	2/27/2018	5			
☐	6/6/2018	1			
☐	6/6/2018	1			
☐	5/16/2018	1			
☐	6/6/2018	1			
☐	4/30/2018	1			
☐	6/6/2018	32			8/kt
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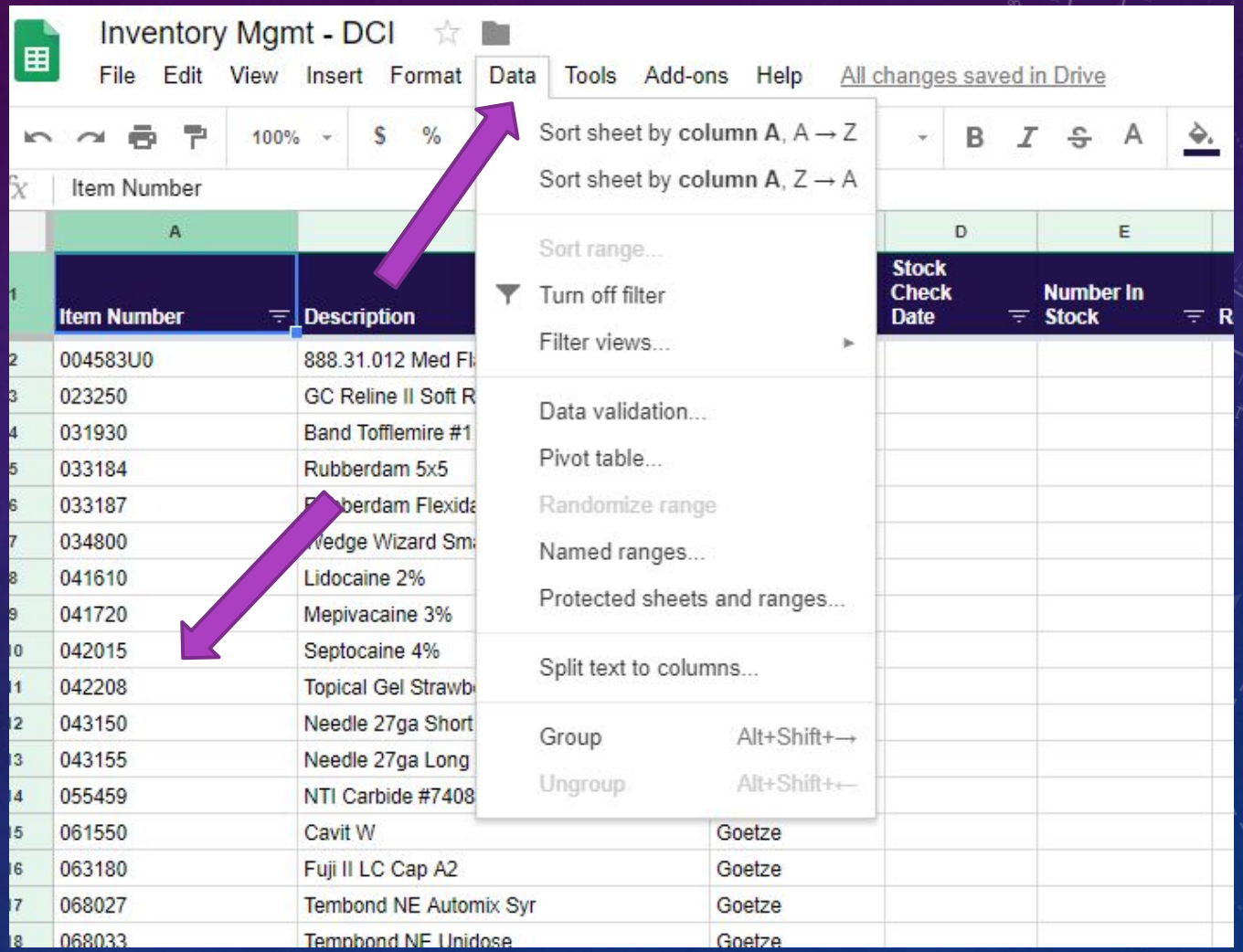
☐	6/6/2018	250			50/box
☐	6/19/2018	400	6/20/18	Karen	200/box
☐	6/19/2018	600	6/20/18	Karen	200/box
☐	6/19/2018	1000	6/20/18	Karen	500/box
☐	6/19/2018	1200	6/20/18	Karen	Buy 5 get 1 free; 200/box
☐	5/14/2018	1			
☐	5/18/2018	2			
☑	6/19/2018	2400		Karen	1200/rl

TIPS AND TRICKS: SORTING

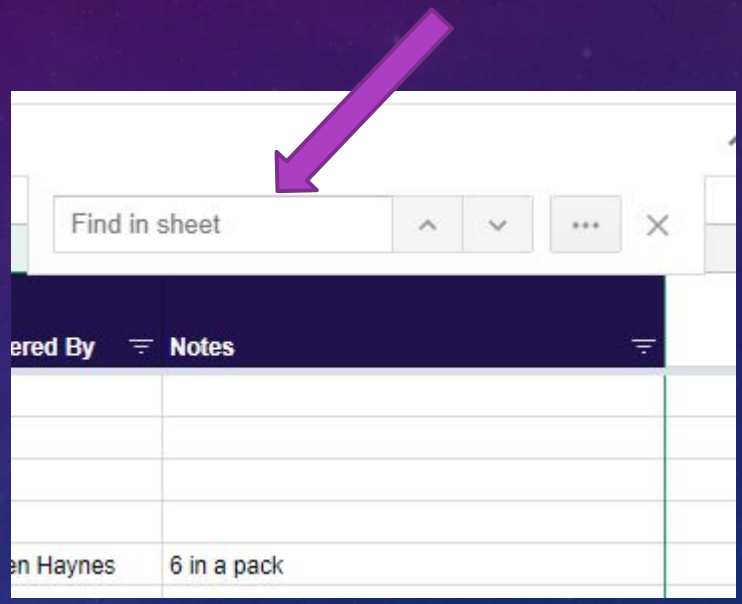
Let’s say you want to put all the items for each vendor together. Or you want to list all the items by description.

Click on data at the top of the worksheet. The first option is to sort the sheet by whichever column your cursor is in. So put your cursor in the column you want to sort by, then click on “sort sheet by column …”



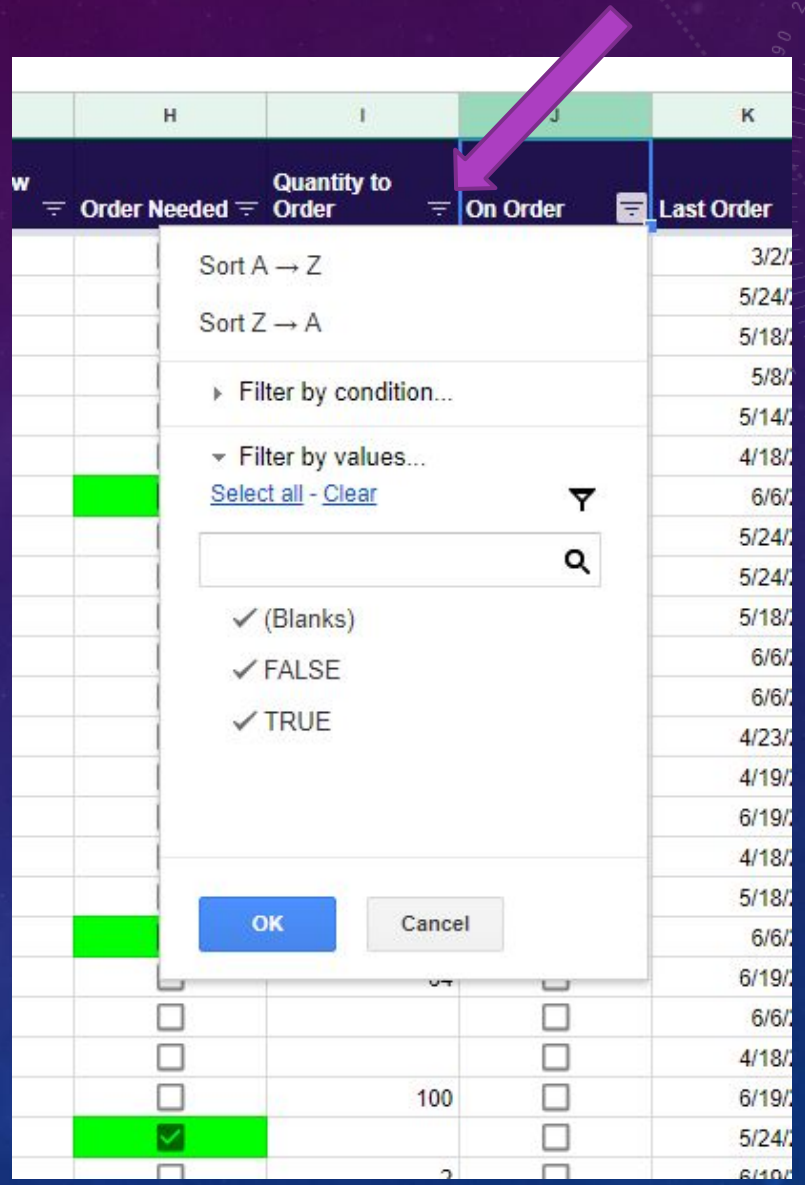
TIPS AND TRICKS: FIND

If you want to search for items by name or item number, type <Ctrl F> and this nifty little window pops up in the upper right corner of your spreadsheet, right above the “notes” column.



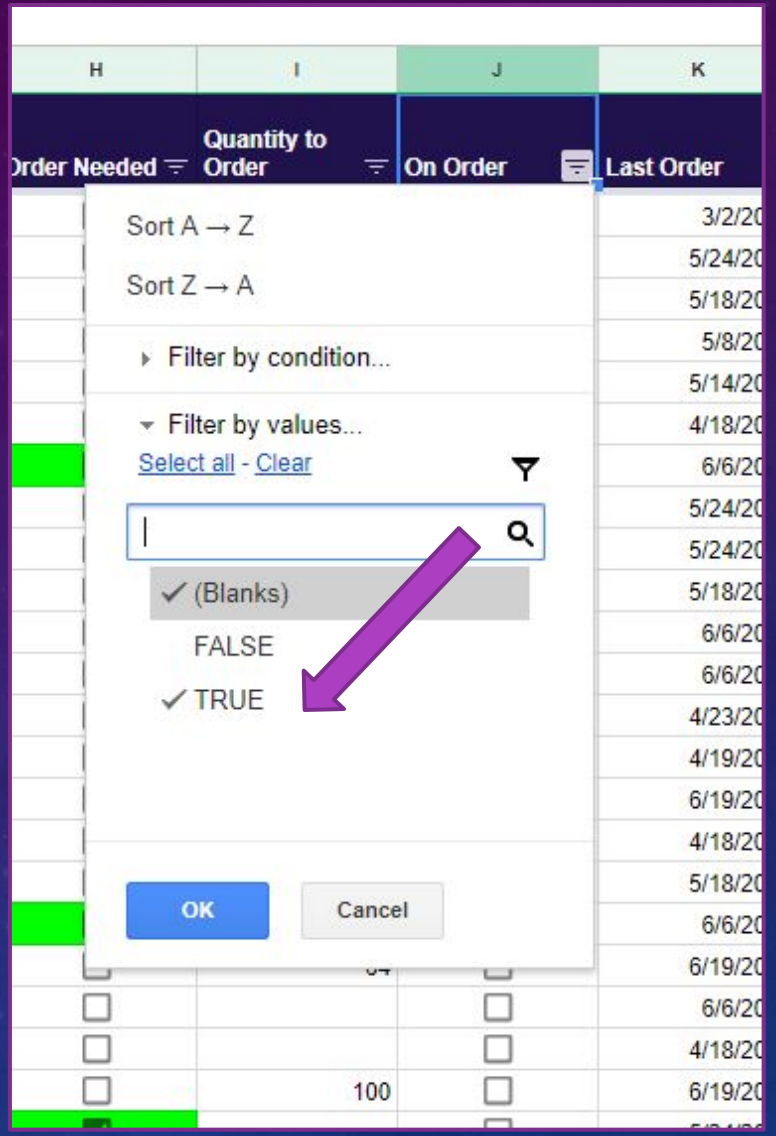
TIPS AND TRICKS: FILTER

To filter so you only see the items on order, click on the triangle in the corner of the “on order” column.



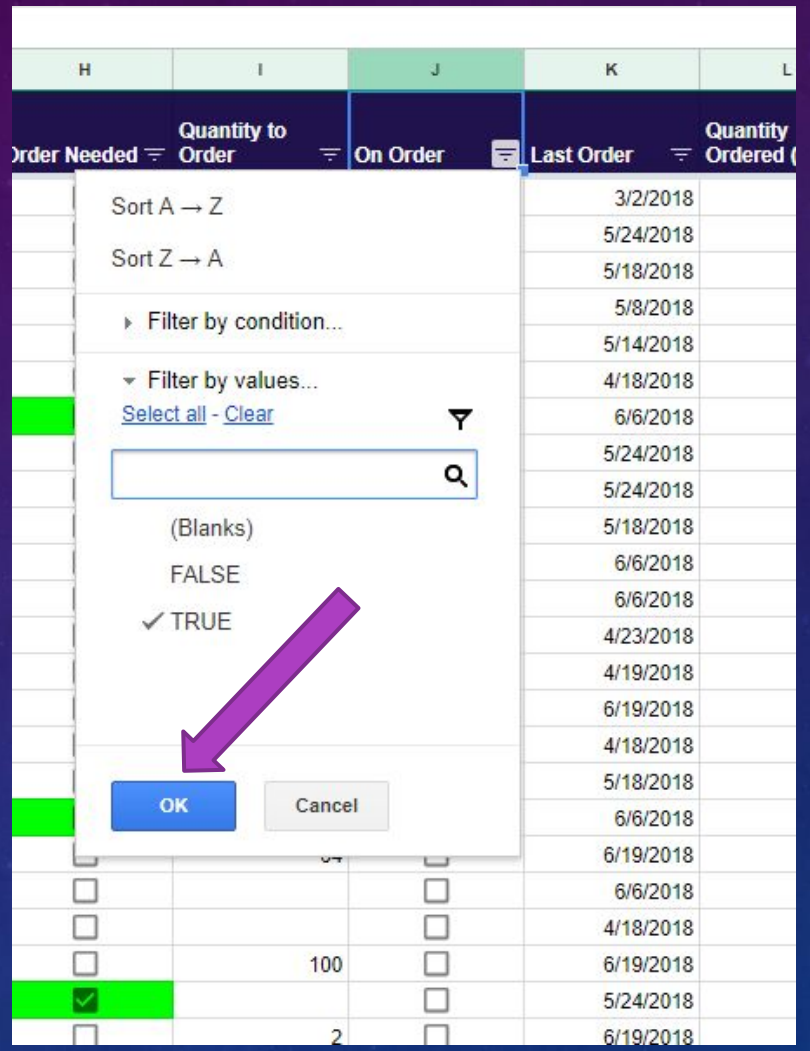
TIPS AND TRICKS: FILTER

Then select only the “true” value.



TIPS AND TRICKS: FILTER

Click on “OK”.

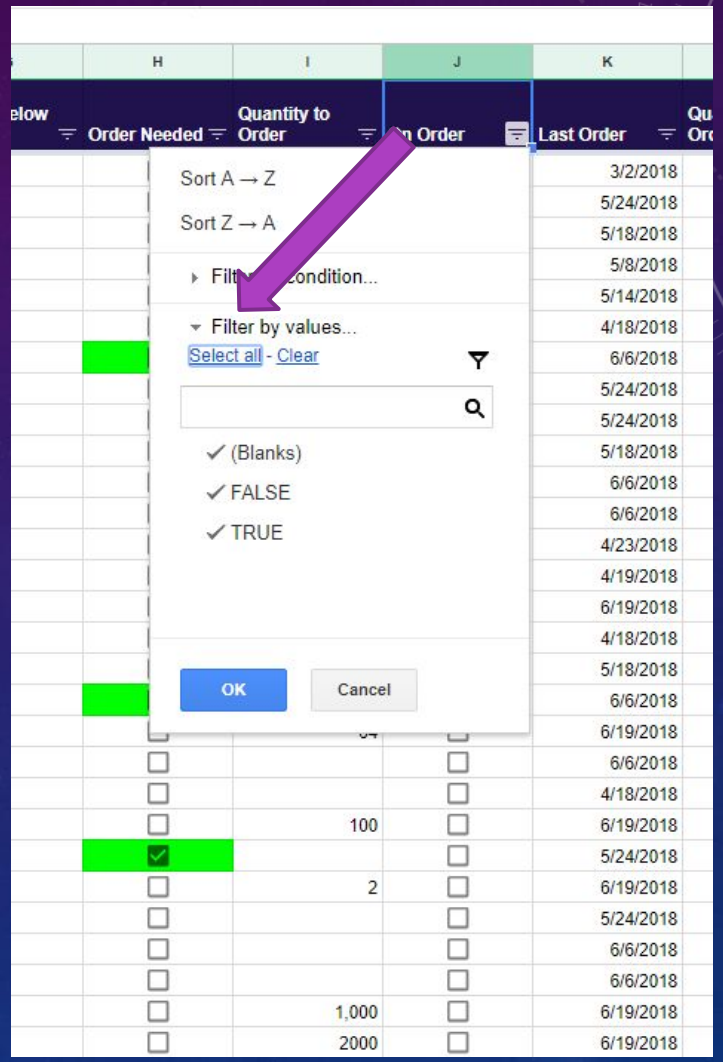


Item Number	Description	Vendor	Stock Check Date	Number In Stock	Reorder	Qty Above/Below Reorder	Order Needed	Quantity to Order	On Order	Last Order	Quantity Ordered (ea)	Received/ Restocked	Ordered By	Notes
VOS301216	Vortex Orifice Opener 30.12/16	Dentsply					☐	2 packs	☑	6/1/2018	12	06/05/2018	Karen Haynes	6 in a pack
191102	Barrier Film 4x6 Clear	Goetze					☐	2 boxes	☑	6/19/2018	2400		Karen	1200/rl
552112	Composite Flowable A1	Goetze					☐	6 syringes	☑	6/19/2018	6		Karen	2/pk
063180	Fuji II LC Cap A2	Goetze					☐	1 bx	☑	6/19/2018	48		Karen	48/box
566447	Half Chair Cover 27.5x24	Goetze					☐	250	☑	6/19/2018	225		Karen	225/box
195205	Mask Comfit White Earloop	Goetze					☐	5 box	☑	6/19/2018	250		Karen	Buy 4 get 1 free; 50/box
138862	Mix Tip Intraoral Yellow	Goetze					☐	1 pkg	☑	6/19/2018	100		Karen	100/bag
2288210	Septocaine 4%	Henry Schein					☐		☑	6/19/2018	100		Karen	50/box
1238468	Tempbond NE Unidose	Henry Schein					☐		☑	6/19/2018	50		Karen	50/pk
198360	Tray Cover 8x12 White	Goetze					☐	1,000	☑	6/19/2018	1000		Karen	1000/box
6405006	Cavicide 5 gal	Henry Schein					☐		☑	6/19/2018	2		Karen	2/pk
100-8502	Bur Carbide Surgical	Henry Schein					☐	25	☑	6/19/2018	25		Karen	5/pk
29167	Manual Torque Wrench Adapter	Nobel Biocare					☐	4 box	☑	6/19/2018	4		Karen	

TIPS AND TRICKS: FILTER

Only the items on order are listed.

TIPS AND TRICKS: FILTER

To see all items again, click on the filtering triangle, click on “select all”, and then OK.

You can filter on any column.