



How to Setup AVImark Inventory



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Revised July 11, 2019

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Setting up Inventory

Although the help text explains what each field in the Change Item window is for, what might not be obvious is the important relationship between certain fields and the Measure of the item. Following these instructions when setting up your inventory will assure that the correct relationship between the fields noted in **bold** is correctly maintained. There are examples at the end of the text to show how various items should be set up.

1. After selecting the category for the new item, right-click on the right side of the window and click **New**. Assign a code and description for the new item.
2. Select the **Measure** of the Item. The measure is how you dispense or sell the item.
3. Click the **Purchasing** tab. You will get a message that reads "Selecting the Purchasing tab requires a new Item to be saved first. Save the Item now? Click **Yes**."
4. Enter the **Order Pack**. The Order Pack is the minimum amount of the measure that you can order.
5. Enter the **Order Quantity**. This is the quantity that you usually order and it must be equal to or a multiple of the Order Pack.
6. Enter the **Order Point**. This is the minimum amount of the measure that you want to keep on hand and it can be any amount or 0.

When an item reaches or goes below the Order Point, the item will be displayed in **red** in the inventory list. When the item is placed on a purchase order, the item will be displayed in **blue**.

7. Click on the **General** tab and enter the **On Hand** quantity. This is the total amount of the measure you have on hand.
8. Enter the cost for the Order Pack in the **Package Cost** field.

Once you click in, or tab to, another field, you'll notice that the Cost field now displays the 'per measure' cost automatically. The program has divided the Package Cost by the Order Pack quantity to arrive at the per measure cost.

There are several other cost type fields that you will not enter data into to but you should know what they are for.

The **Markup Unit** and **Markup Pkg Cost** fields on the General tab: If you use the purchase order function, AVImark will automatically maintain these amounts as the highest cost you have ever paid for the item.

The **Average Unit Cost** and **Average Pkg Cost** fields on the Purchasing tab: If you use the purchase order function, the program will maintain this field as your current cost plus any costs incurred by purchasing the item such as shipping, taxes and handling fees that you specify upon receipt.

Once you've completed setting up the new item and click **OK** on the Change Item window, AVImark will copy the Cost value into the Markup Unit Cost and Average Unit Cost fields. It will copy the Package Cost into the Markup Pkg Cost and Average Pkg Cost fields, too.

You will likely want to add appropriate action codes, a markup percent, price, and perhaps fill in some of the other fields.

Examples

Example 1:

An item is sold or dispensed by the cc. The minimum amount you can order is one bottle of 100 cc's for \$25.00 and you currently have 1 ½ bottles on hand. You want to keep ½ bottle on hand and order 2 bottles at a time.

Measure = cc

Order Pack = 100 (the minimum amount of cc's you can order)

Order Qty = 200 (a multiple of the order pack)

Order Point = 50 (the amount of cc's you want to keep on hand)

On Hand = 150 (1 ½ bottles equals 150 cc's)

Package Cost = 25.00 (the cost for one bottle of 100 cc's)

Example 2:

An item is sold or dispensed by the tablet. It comes 6 tablets to a card and there are 10 cards in a box. The minimum you can order is one box for \$75.00 and you currently have 3 cards on hand. You want to keep one card on hand and order 2 boxes at a time.

Measure = tablet

Order Pack = 60 (6 tablets per card x 10 cards = 60 tablets in box) Order Qty = 120 (two boxes of 60 tablets)

Order Point = 6 (one card of 6 tablets)

On Hand = 18 (three cards of 6 tablets each)

Package Cost = 75.00 (cost for one box of 60 tablets)

As you can see from each example, all fields are consistent with the measure of the item.