



# Intelligent Inventory Integration



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# Table of Contents

Intelligent Inventory Integration.....	3
What is Intelligent Inventory? .....	3
Workflow Overview.....	3
Which Inventory Companies Utilize Intelligent Inventory?.....	3
Initial Setup.....	3
Intelligent Inventory Gateway Service Installation.....	5
Advanced Options .....	5
Closed Loop Ordering .....	6
Starting the Gateway Services .....	6
Cross-Referencing Items.....	7
Inventory List .....	7
Change Item Window.....	7
Import Purchase Order Window.....	8
Placing Items to Order .....	8
Receiving Items .....	9

# Intelligent Inventory Integration

## What is Intelligent Inventory?

Intelligent Inventory is a cloud-based service that provides assistance to veterinary practices in managing their inventory. Intelligent Inventory greatly reduces the amount of time spent processing purchase orders and provides an immediate impact on product pricing, inventory control, and inventory accuracy.

## Workflow Overview

The normal workflow for AVImark clinics will be as follows:

- ✓ Clinic places an order with vendor using their normal ordering process (i.e. fax, phone, e-mail, etc.)
- ✓ Vendor ordering system uploads the purchase order information to the Intelligent Inventory servers.
- ✓ The Intelligent Inventory servers push the purchase order data down to the appropriate clinic and is received by the Intelligent Inventory Gateway software installed at the clinic.
- ✓ The Intelligent Inventory Gateway manager software will download the purchase order and store it as an XML file in the Purchase Order folder on the AVImark server computer.
- ✓ AVImark is then notified when a new purchase order is added to the folder and an alert is presented to the appropriate users depending on the configuration.
- ✓ Any of the users who are setup to process purchase orders will be able to launch the Purchase Order Import screen where they will be able to review the purchase orders and import them if desired.
- ✓ Any problems with the import process will be reported to the users with messages on the action that will need to take place.
- ✓ At this point, the purchase order is ready for the receiving process which will be performed when the product arrives at the clinic for delivery.

## Which Inventory Companies Utilize Intelligent Inventory?

The following inventory distribution companies utilize Intelligent Inventory for ordering.

- ✓ Henry Schein
- ✓ Midwest Veterinary Supply

## Initial Setup

Clinics wishing to utilize the Intelligent Inventory integration within AVImark will need to do the following:

- ✓ Register for an account at [www.intelligentinventory.com](http://www.intelligentinventory.com) to obtain a Gateway Account ID and credentials for using the site and connecting to the Gateway to retrieve purchase orders.
- ✓ They will also need their account numbers with participating distributors.



*Please be aware of the distinction between your Gateway account ID (the ID that identifies you to Intelligent Inventory) and your distributor account ID (the ID that identifies you to Henry Schein or Midwest).*

## **Intelligent Inventory Services Menu**

Intelligent Inventory options can be accessed from two separate areas within AVImark: Client Information Display and Inventory List.

- ✓ From the CID, select **Services | Intelligent Inventory** to view the options.
- ✓ From the Inventory List, select **RX Cross-reference**.

### **Additional Options**

- ✓ From **Change Inventory | Pharmacy** tab, right-click within the **Pharmacy Company Codes** area.
- ✓ **Get Inventory Items**—This option will update the distributor's inventory and performs the manual retrieval of data that occurs automatically when the Catalog Update takes place.
- ✓ **Review Purchase Orders**—Opens the window displaying all available Purchase Orders containing items needing to be mapped to AVImark items and imported.
- ✓ **Website**—Launches the Intelligent Inventory site from within AVImark.
- ✓ **Set Auto Process Computer**—Using this option on an AVImark workstation, will designate that workstation as the computer to be used for processing communications between AVImark and Intelligent Inventory.
- ✓ **Configure**—Holds the practice inventory management system (PIMS) account number, Gateway User Name, Gateway Password and Practice ID.

### **Order of Setup**

Below is the order the services and options should be performed before utilizing Intelligent Inventory:

1. Install the IIGateway Service.
2. Set Advanced Options.
3. Review Item Code Company table.
4. Enter Intelligent Inventory Credentials.
5. Edit the distributor information.
6. Start the IIGateway Service.
7. Set Auto Process Computer.
8. Run the Get Inventory Items utility.

## Intelligent Inventory Gateway Service Installation

This Intelligent Inventory Gateway Service will receive and store all purchase orders in the appropriate folder designated by the AVImark administrator.

1. Run the IntelligentInventory.exe self extractor to extract the contents into the AVImark folder. This will create an IntelligentInventory subfolder within AVImark containing 12 files.
2. Run the Run Me.bat file to install the IIGatewaySvc.

### Advanced Options

Enter the keyword of "Intelligent Inventory":

- ✓ **Auto Process Incoming Purchase Orders**—When set to True: This option will allow all Purchase Orders to be imported to the AVImark Inventory Purchase Order list automatically, provided all distributor items contained on that Purchase Order are mapped to an AVImark item.
- ✓ **Computer GUID to Auto Process Intelligent Inventory POs**—This will display the computer GUID for the workstation designated by having run the "Set Auto Process Computer".
- ✓ **Days Before Next Auto Catalog Update (0 = do not auto run)**—The number entered here will update the distributor's inventory automatically at the given day interval, unless the interval is zero.
- ✓ **Last Catalog Update**—Date the last update took place
- ✓ **Run Purchase Order Monitor**—This runs a purchase order monitoring utility on the Auto Process Computer to monitor incoming purchase orders from Intelligent Inventory.

## Closed Loop Ordering

To place orders on the Henry Schein Animal Health website from within AVImark, enter the keyword of "shopping" in **Advanced Options** and enter the following information:

- ✓ **Account Number**—Enter in your Henry Schein Billing Account number.
- ✓ **Password**—Enter in your password that is used to access the HenryScheinVet.com website.
- ✓ **Sequence Number**—This number is the three digit number at the end of your Billing Account number.
- ✓ **User Name**—Enter in the user name that is used to access the HenryScheinVet.com website.

### **Review "Item Code Company" Table**

Go to System Tables to ensure the Item Code Company table is present after the update and check there are vendors entered within this table for Henry Schein and Midwest.

### **Enter Intelligent Inventory Credentials**

Access the Configure window from the CID by selecting **Services | Configure**. This window contains all of the vendor account information for the Intelligent Inventory integration. The information below is received from Intelligent Inventory in an email:

- ✓ PIMS Account Number
- ✓ Gateway User Name
- ✓ Gateway Password
- ✓ Practice ID — Auto-populated from Gateway Service.
- ✓ Distributor Configuration - This contains all of the distributor information. This information will need to be set up by the user based on vendor used. Utilize the+, E, and - to the right of the configuration window to add(+), edit (E), and remove(-) distributors from the grid.
  - o Distributor# — This is the vendor number as listed within System Tables.
  - o Account# — This is the account number that is supplied to the user by the vendor.

## Starting the Gateway Services

This Intelligent Inventory Gateway Service will receive and store all purchase orders in the appropriate folder designated by the AVImark administrator. This will need to be run manually the first time utilizing Intelligent Inventory. After this initial start the program will continuously run on the computer designated as the server.

To manually start the service from the Start Menu, type **Services** to locate the IIGateway Service then right-click | **Start**.

### **Setting the Auto Process Computer**

Go to the workstation you would like to set as the Auto Process computer. This is going to be the computer that communicates and auto processes incoming Intelligent Inventory purchase orders. It will also need to be a computer that is on the internet and has a stable, and preferably, high speed connection. Once in AVImark on that computer, go to **Services | Intelligent Inventory | Set Auto Process Computer** to set.

## Run the "Get Items" Utility

To access the Get Items utility program go to **Services | Get Inventory Items** from the CID. This program will pull a list of all vendors and adds them to the Item Code Company table in System Tables. It also pulls a list of items available from each vendor. This allows the user to cross-reference items in their inventory list with the selected vendor list.

## Cross-Referencing Items

There are three areas within AVImark where users can cross-reference or "map" distributor item codes to existing AVImark item codes. This will link the vendor item code and name to the item contained within the AVImark Inventory List.

### Inventory List

1. To access this option open the Inventory List window and select **RX Cross-reference | Intelligent Inventory**.

When selecting this option a confirmation message may display alerting you that the "Inventory Catalog has not been updated in XXX days".



*This message is informing you that the inventory vendor inventory catalog has not been updated in the days indicated. This is done automatically by setting the Advanced Option of Days Before Next Auto Catalog Update (0 = do not auto run). You can also view the last catalog update from within Advanced Options by viewing the Last Catalog Update option default value. If you would like to update the inventory catalog manually select Services (menu), Intelligent Inventory, Get Inventory Items from the CID.*

2. When clicking yes to this message, the Select Intelligent Inventory Distributor window will display. Within this window you will select the default vendor you would like to place your orders from.
3. AVImark will then load the appropriate vendor inventory list allowing the user to associate the correct vendor item with the AVImark item.
4. Simply match the inventory item to the item contained in the drop-down list.

### Change Item Window

1. Go to the Change Item window of an inventory item and select the **Pharmacy** tab.
2. Within the Pharmacy Company Codes grid **right-click | New**.
3. In the New Item Code window use the **Company** drop-down to select the appropriate vendor this item is associated with then within the **Code** drop-down select the matched inventory item for that vendor and click **OK**. This will then display the vendor's item information within the Change Item window.

## Import Purchase Order Window

1. From the CID go to **Services | Intelligent Inventory | Review Purchase Orders**.
2. In the Import Purchase Orders window, select a purchase order under the **POs to process** area. This will display the purchase order details to the right. Any items highlighted in **yellow** need a cross-reference linked.
3. To link an item simply double-click on the highlighted line or utilize the Rx Items button to select from the inventory list.



*Purchase Orders beginning with N indicate a New Order, and those beginning with U indicate an update to an existing Purchase Order. If you attempt to Import a purchase order with a U prefix and haven't yet released the equivalent N order yet, you will receive this warning: "Warning. Could not update this PO. Be sure released PO exists." When you Import the New and corresponding updated order, they will be merged as one order in the AVImark Purchase Order window for receiving.*

- ✓ If you have an item that you do not wish to cross-reference to an AVImark item, you can right-click on that item and mark it as a non-inventoried item.

## Placing Items to Order



*This feature only works with Henry Schein Animal Health.*

1. Open the **Inventory List**, and either place items to order on a **Needs List** or on a **Purchase Order**.
2. From either window, at the top, select **Henry Schein Animal Health** to open their website to place an order.



## Receiving Items

Once the distributor item codes are associated to AVImark item codes, the system will automatically import Intelligent Inventory purchase orders.

Upon opening AVImark on the workstation set as the Auto Process computer, users could be prompted with a Catalog items prompt. This workstation will also display an Intelligent Inventory Monitor window in the lower-right corner of the screen indicating the number of purchase orders ready for review.

Purchase orders that contain a complete list of AVImark/Intelligent Inventory cross-referenced items will be automatically imported to the AVImark Inventory List where they can be received/receipted as a typical AVImark generated purchase order.

1. To find this list, open the **Inventory List** and select **File | Order | Choose**. This will display the list of imported purchase orders.
2. To receive the items into the AVImark Inventory List, either **right-click | Select** or double-click on the appropriate order.
3. Within the Purchase Order select **Order | Receive**.
4. The following informational message will then appear informing you that the received quantity has been set to the quantity ordered.
5. Click **OK** and make any necessary adjustments.
6. Select **Order | Receive** again to complete the receipting process.
7. Enter the appropriate information the click **Continue** to complete the order.

The received items will be updated in the AVImark Inventory to indicate the item was received. These areas include:

- o On Hand Quantity
- o Purchase History
- o Last PO
- o Average Cost information
- o Bar Codes
- o NDC



*One area that will not be updated is Expiration Date information.*