



# **Business Operations**

## **Supplies On Hand**

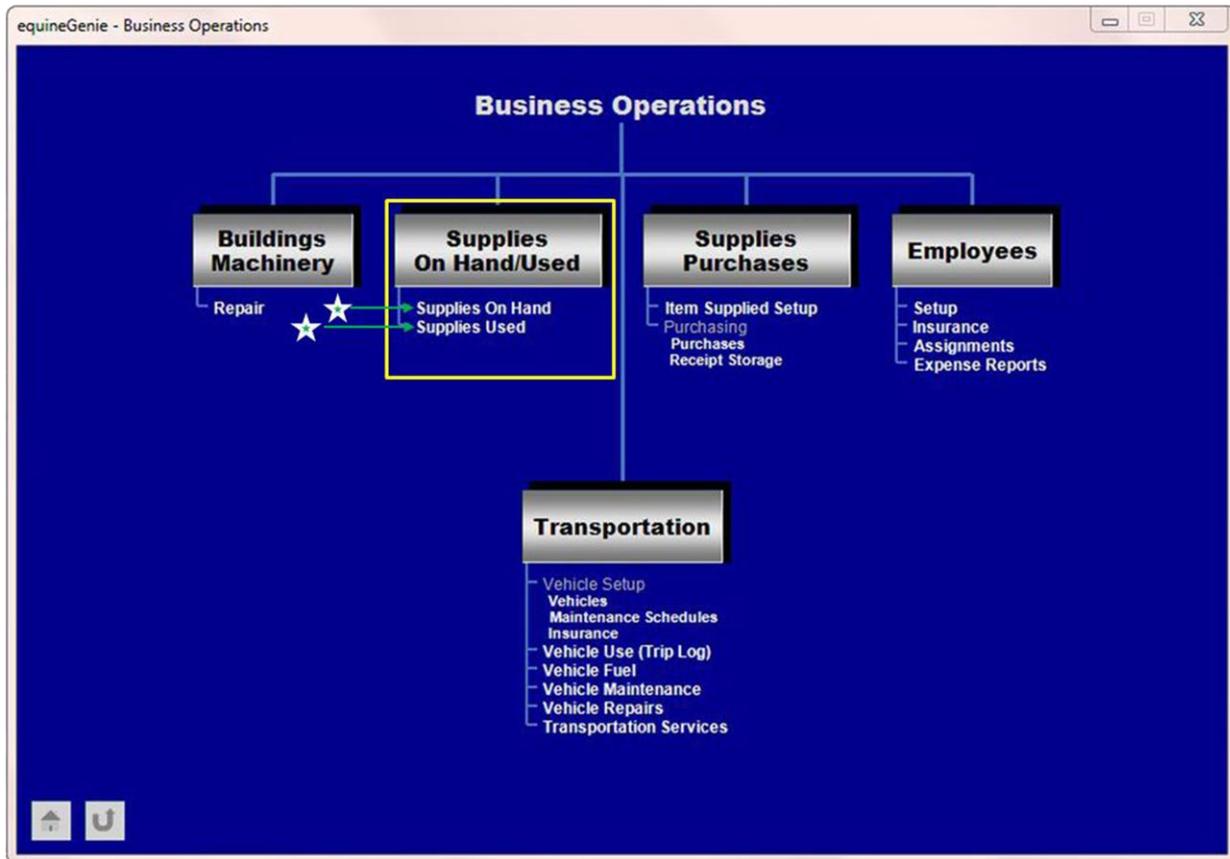
## **Supplies Used**

# Business Operations – Inventory Management

## Table of Contents

Business Operations – Supplies On Hand..... 3  
Business Operations – Supplies Used..... 5

Mouse Over and Click on a content subject to go to that subject



## Business Operations – Supplies On Hand

Path: Home: Business Operations: Supplies On Hand Used: Supplied On Hand

**There is a prerequisite required. At least one supplied item must have been entered on the Items Supplied Setup screen. Path – Home: Business Operations: Items Supplied Setup**

**Think/Plan before you take an inventory of your supplies on hand! You need to think about the locations where your supplies are stored. You need to think about how your supplies are stored to avoid shrinkage (Waste and spoilage). Inventory waste is the same as burning up your cash.**

**Note: You can take an inventory before your purchase an inventoried item through equineGenie. However, the unit of measure and unit cost will not be displayed until an item is purchase through equineGenie.**

① **Enter** the Date that the supply is being inventoried by selecting the date from the calendar icons or entering the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy).

② **Select** the Item that is being inventoried (counted) from the Select Item dropdown.

**Note:** The items that are displayed in the Select Item dropdown are the items that you entered on the Items Supplied Setup screen. *Path – Home: Business Operations: Items Supplied Setup*

③ If the selected item to be counted was purchase through equineGenie the item’s unit of measure and its unit cost will be displayed.

- ④ **Select** the location of the item to be counted from the Enter / Select Item's Location dropdown. A new location can be added by selecting [New Location] from the Enter / Select Item's Location dropdown and then clicking in the Enter / Select Item's Location dropdown and entering the items name.
- ⑤ **Enter** the count of the selected item from the selected location in the Quantity / Location box.
- ⑥ **Select** the '**GREEN Count Complete**' button to enter or update the item's on hand count in the selected location.

**Note:** equineGenie automatically adds each location count together to get the selected item's total on hand count.

- ⑦ If the item being counted is stored in more than one location another location can be counted by selecting **Multiple Locations Same Item**. Selecting the **Multiple Locations Same Item** will enter and clear the previous count and location so the item can be counted in another location.
- ⑧ equineGenie displays the selected item's inventory information and any changes in count and value since the item was last inventoried.
- ⑨ **Select Enter before leaving the Business Operations – Supplies On Hand screen.**
- ⑩ **Selection** of the '*View Supplies On Hand*' will enable the supplies on hand to be viewed, exported and/or printed.
- ⑪ **Selection** of the '*View Supplies On Hand By Location*' will enable the supplies on hand in each designated location to be viewed, exported and/or printed.

**Information:** Many more supplies on hand reports are available in the Executive Summary: Business Summary section. *Path – Home: Executive Summary: Business Summary: Supplies/On Hand.*

[Return to the Table of Content](#)

## Business Operations – Supplies Used

**There is a prerequisite required. At least one supplied item must have been entered on the Items Supplied Setup screen. Path – Home: Business Operations: Items Supplied Setup**

**Think/Plan before you remove an item's quantity from your supplies on hand!**

**Note: Once a quantity for a selected item is removed that item's quantity will be reduced by the quantity removed. You will need to purchase more of the item to increase the items quantity on hand or take an inventory to reset the quantity on hand!**

The screenshot shows the 'equineGenie Business Operations - Supplies Used' window. On the left, under 'Supplies Used/Removed', there are fields for 'Date' (1), 'Select The Item Used / Removed' (2), 'Item Quantiti' (3), 'Unit of Measure:' (4), and 'Another Item' (5). On the right, under 'Supplies Used Comments', there is a text area and an 'Enter' button (6). A yellow popup window is overlaid on the bottom right with the text 'Popup And Red Flag equineGenie Notes'.

① **Enter** the Date that the item's quantity is being deducted from by selecting the date from the calendar icons or entering the date format set in your windows operating system. (mm/dd/yyyy or dd/mm/yyyy).

**Note:** The Supplies Used screen can also be displayed as a result of the **Supplies Used?** button being selected on another screen.

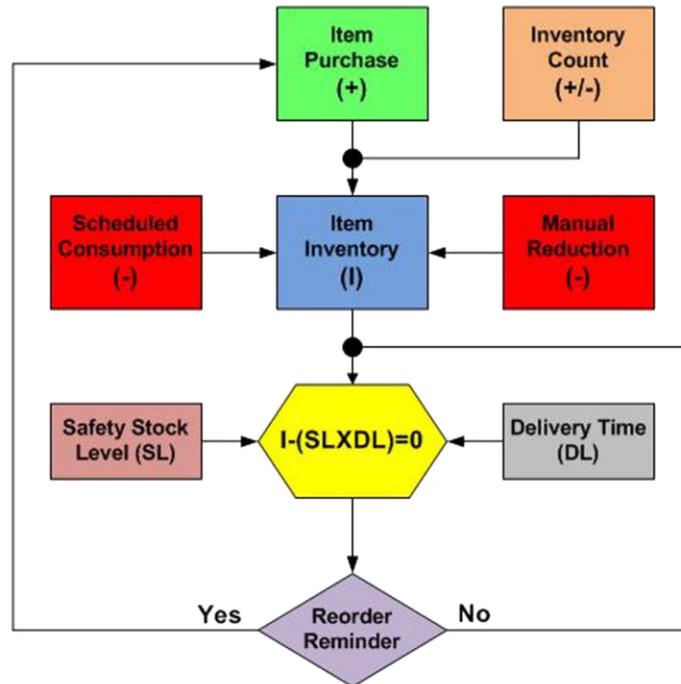
② **Select** the item that was used or whose quantity needs to be reduced from the Select The Item Used / Removed dropdown.

**Note:** The items displayed in the Select The Item Used / Removed dropdown are the items setup on the Items Supplied Setup screen. *Path – Home: Business Operations: Supplies Purchases: Item Supplied Setup*

- ③ **Enter** the quantity of the item selected from the Select The Item Used / Removed dropdown that was used or whose inventory needs to be reduced.
- ④ The **Unit of Measure** of the selected item is displayed.
- ⑤ Another item can be selected by selecting **Another Item**. Selecting **Another Item** will reduce the inventory of the previous item by the entered quantity, clear the quantity and unit of measure so the next item can be selected and its inventory reduced.

**Note: If an item had a safety stock level entered when the item was setup on the Item Supplied Setup screen, and the item's quantity is reduced on the Supplies Used screen, equineGenie will automatically reset the reorder trigger to match the required safety stock and the item's supplier delivery lead-time.**

### Inventory use and Reorder Cycle



- ⑥ **Select Enter** before leaving the Business Operations – Supplies Used screen.

**Information:** Many more supplies on hand reports are available in the Executive Summary: Business Summary section. *Path – Home: Executive Summary: Business Summary: Supplies/On Hand.*

[Return to the Table of Content](#)