

EPIC TRAINING



Manage Stock
Quick Start Guide

HOUSTON
Methodist[®]
LEADING MEDICINE



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Update Stock Levels Manually

To enter a level adjustment that isn't tied to a particular purchase order:

1. Open the **Inventory** activity for the location where you want to update balances.
2. Click **Update Balances**.
3. Select the reason for the update.
4. If it's not selected automatically, select how to update balances:
 - Increase stock**
 - Decrease/waste stock**
 - Set stock level**
5. Scan the NDC barcode or manually select an inventory item in the **Inventory item** field.
6. Enter a value in the corresponding field, the label for which depends on the selection you made in step 4:
 - Increase balance by**
 - Decrease balance by**
 - Set balance to**
7. Confirm that the calculated new total balance is correct and click **Update** to show information about the update in the report at the bottom of the activity.

Return Stock When Receiving a Purchase Order

If you need to send items back to a supplier and don't want to manually update balances for returned items, document those returns alongside the received shipment.

1. After you receive a shipment, open the inventory request.
2. From the **Receive Shipment** menu on the **General** tab, open a new return to the supplier.
3. Select a reason for the return on the **Return** tab.
4. Either scan the items you're returning or enter the quantities manually in the **Retr** column.
5. Print a list of items to return and click **Send Shipment** to automatically update balances for the returned items.



You can document returns at any point after a shipment has been received, even if the request is closed.