

What's New in OIO – please note that these screen shots are for Multiple Offices OIO but much of the information pertains to single office as well.

Exciting News!!! – Add items to existing PO's, edit supply names and send records to excel from Edit/Fill, keep order screen separate by office, send Invoice information to **QuickBooks** – and much more!

Preferences: Please refer to a, b & c below.

a. Under the Multiple Office tab, “Enable Ordering as a Single Office” allows Multiple Office Users to keep their Order Screen separated for each office independently of the other offices. It is explained fully in the Ordering Section #3.

b. This option to update prices was previously automatically assumed. We have added a preference to tell OIO to update your supply screen prices (or not if unchecked) when prices are changed in the Post Orders received screen. **Please make sure you check to see that it is on if you want to map price changes back to the supply screen** for future orders of each supply.

c. “Upload Barcodes by Employee ID” is explained in the Barcode Section - #6. The reason we added it is to allow scans to be kept separate for each individual office (Multiple Office Users). Note that Employee ID's are set in the Employee list on the record for each individual employee. A default office for each employee is also required.

1. **Supply Screen:**

a. We have added the ability to print barcode labels directly from the supply screen. Choose your supply, Click on the “Print Barcode Label” button. A pop up will bring you to the label printing screen where you can preview or print, using whatever printer option you choose.

Supply

Supply Item: Clorox Germicidal Spray 32oz

Find Supply: Find Catalog#

Alternate Supplier Save

Comments

Category: Chemicals

Supplier: Benco Dental

Account #

Phone: 1-800-Go-BENCO

Local Phone

Chart Of Accounts: Dental Supplies

Storage 1 - 2: Not Specified

Departments: Sterilization

Promise Date: 10/17/2011

Barcode: OIO601

MSDS Link

Show MSDS

Image

Link To Image

Appliance: Can Have Color

All or Individual Barcode Labels

Suppliers: All

Storage Area: All

Categories: All

Departments: All

Offices:

Product Groups: None Selected

Supply Item Description: Clorox Germicidal Spray 32oz

Printers: Lexmark 7600 Series (USB)

Label Type: Sheet Feed (5163) (C2163 A4)

Continuous Feed (Dymo 30573)

Barcode Only (5160) (C2160)

Barcode Only (Dymo 30321)

Supply Names Only (Avery 5160)

Skip Avery Label #: 0

Start Label Number: 1

Print Storage 2 instead of Catalog #:

Include Storage 2 In List:

Print Sequenced Labels:

Number Of Labels: 1

MSDS Labels:

Asset Labels:

Print Barcode Label

Print Report

Restore All Preview Report OK

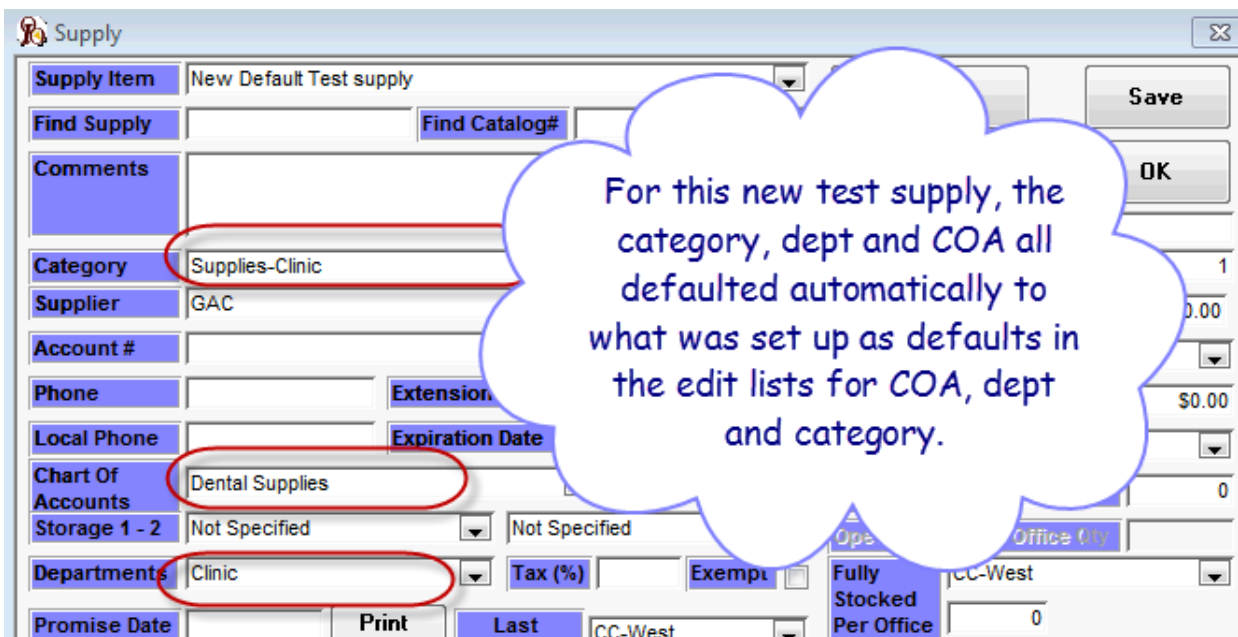
- b. In conjunction with the Dept, COA and Category lists, we have created the ability to choose a "Default" setting for these parameters so new supplies you add will automatically default to your chosen Dept, COA or Category:

Add A New Category or Delete an Existing One

Categories: Supplies-Clinic

Set As Default Category

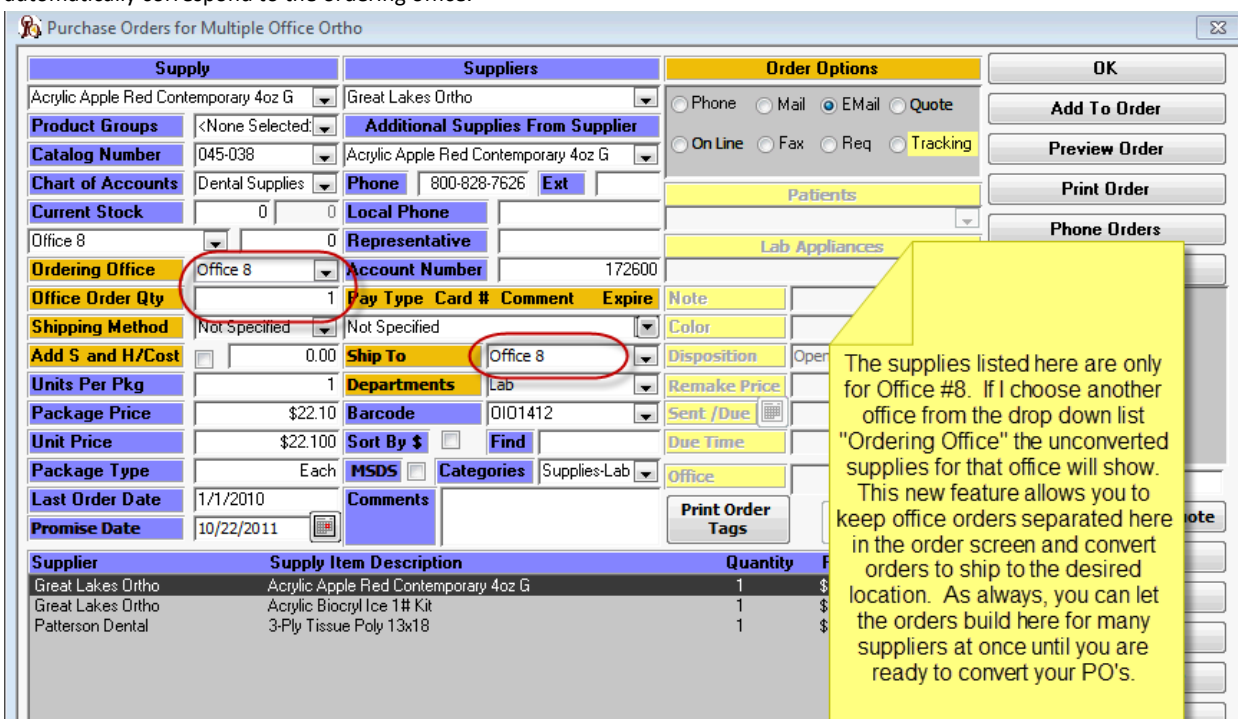
Print Delete Entry OK



2. **Order Screen:**

- a. You can limit the Order screen to orders for one office at a time. This is done by first setting up the preference under the “Multiple Offices” tab as discussed in section #1 – Preferences. You will be warned to make sure your shipping addresses are tied to your offices correctly by checking the ship to addresses/offices. You will also need to finalize (convert) any existing orders in the Order Screen before you start using this new option.

Once you have set the preference for Single Office Ordering, you will see only that office’s open orders and the ship to address will automatically correspond to the ordering office.



- b. We have changed the order in which supplies appear on the Purchase Order so that it is easier for the Supplier Reps to place your orders. The supplies now appear in Catalog number order:

Order Type E Mail

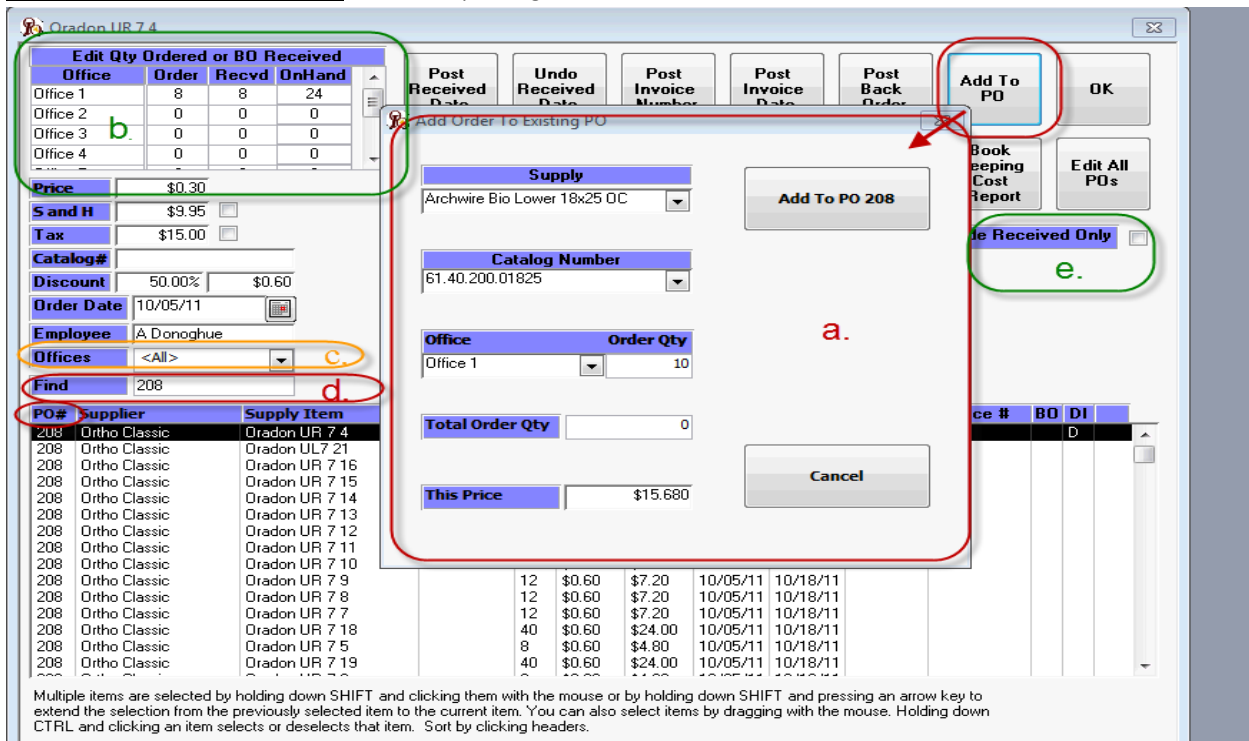
Payment Method All

Ordered By S Rosen

Department Records

Line #	Catalog #	Description	Qty	Unit Price	Pkg Price	Sub Total
1	040-016	Acrylic Biocryl Resin Clear	2 Each	\$0.00	\$0.00	\$0.00
2	045-038	Acrylic Apple Red Contemporary 4oz G	1 Each	\$22.10	\$22.10	\$22.10
3	047-001	Acrylic Biocryl Ice 1# Kit	1 Each	\$41.61	\$41.61	\$41.61
4		Shipping and Handling				\$0.00
5		Tax				\$5.26
PO Totals			4			\$68.97

3. **Post Orders Received Date Screen:** See corresponding "a."-"e." on screen shot below.



- By popular demand, we have added the ability to add items to an existing PO. This is very useful for times when the Rep calls and asks if you want to add something that is on special or if you forgot an item on the PO in OIO. Just highlight one line of the PO# you wish to add a supply to, click on the "Add to PO" button, scroll to the item you want and office you want it for, and enter the quantity. A new line item will be added to the existing PO that you highlighted.
- The Edit Box for Ordered and Backordered quantities are now consolidated in the Multiple Office version of OIO. We have added a column to show the On Hand Quantity for any highlighted supply item as well. The On Hand column amounts are for information only and cannot be edited.
- The Post Received list can now be sorted by a single office or all offices orders together. Note that if an ordered supply has quantities for more than one office on a PO, that supply item line will appear when any office that contains an order for the supply is chosen from the drop down.

- d. We have improved the find box so that you can limit the list to only those line items that correspond to your find choice. In this case we clicked on the PO section of the header bar and then typed 208 into the find field. (Note that you must first click the column you wish to search on the header bar to set up the search criteria). Only items on PO#208 now appear in the edit box. This find field also works well with finding all items on a particular invoice, one supplier or one supply. You can also sort column information such as received date, etc. by clicking on any field column once (high to low, A-Z) twice (low to high Z-A).
- e. There is a new check box that allows you to view only items that have already been posted as received. You will need to click on "Edit all PO's" after checking this box.
- f. New check boxes allow you to obtain separate editable line items for tax and S&H records:

- g. The Bookkeepers Report will now show COA totals by Office to help break down costs by office.

Multiple Office Ortho

Purchase Orders

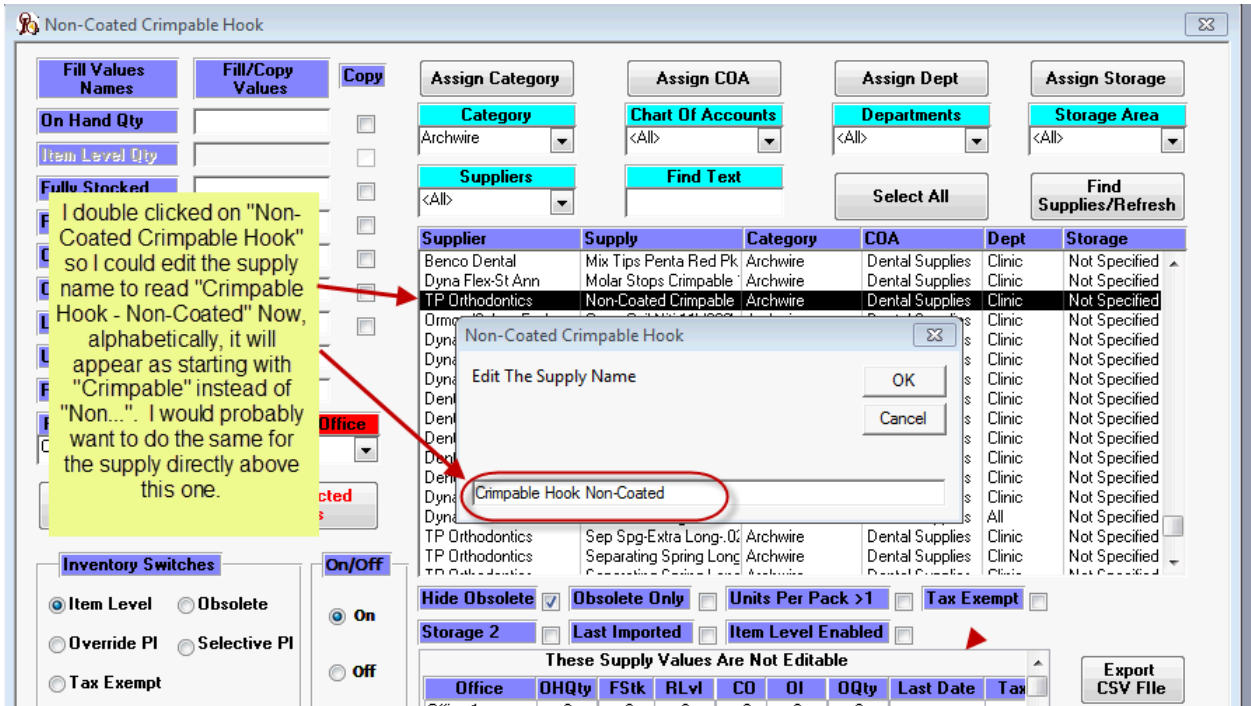
Supplier	Supply	Catalog #	PO #	Received	QTY	Discount	FX Price	Price	Tax Exempt	Taxable	Sub Total		
Dyna Flex-St Ann	Bite Stick-Star Tip Sterilizable	1425-03	193		30			\$9.00	\$0.00	\$270.00	\$270.00		
Dyna Flex-St Ann	Alginate Kromopan Pouch	1552	193		80			\$8.20	\$0.00	\$656.00	\$656.00		
										Office 1 Office Sub Totals	\$0.00	\$926.00	\$926.00
Dyna Flex-St Ann	Alginate Kromopan Pouch	1552	193		80			\$8.20	\$0.00	\$656.00	\$656.00		
										Office 2 Office Sub Totals	\$0.00	\$656.00	\$656.00
Dyna Flex-St Ann	Bite Stick-Star Tip Sterilizable	1425-03	193		30			\$9.00	\$0.00	\$270.00	\$270.00		
										Office 3 Office Sub Totals	\$0.00	\$270.00	\$270.00
										Dental Supplies COA Sub Totals	\$0.00	\$1,852.00	\$1,852.00
										Invoice Sub Totals	\$0.00	\$1,852.00	\$1,852.00
Dyna Flex-St Ann	S and H				1			\$9.95	\$0.00	\$0.00	\$9.95		
										Office 1 Office Sub Totals	\$0.00	\$0.00	\$9.95
										S and H COA Sub Totals	\$0.00	\$0.00	\$9.95
Dyna Flex-St Ann	Tax				1			\$152.79	\$0.00	\$0.00	\$152.79		
										Office 1 Office Sub Totals	\$0.00	\$0.00	\$152.79
										Tax COA Sub Totals	\$0.00	\$0.00	\$152.79
										Invoice Sub Totals	\$0.00	\$0.00	\$162.74
										Totals	\$0.00	\$1,852.00	\$2,014.74

Note that S&H and Tax default to the "home" office (#1) if there are multiple office orders but would be designated as the ordering office if all the PO items were for only one office.

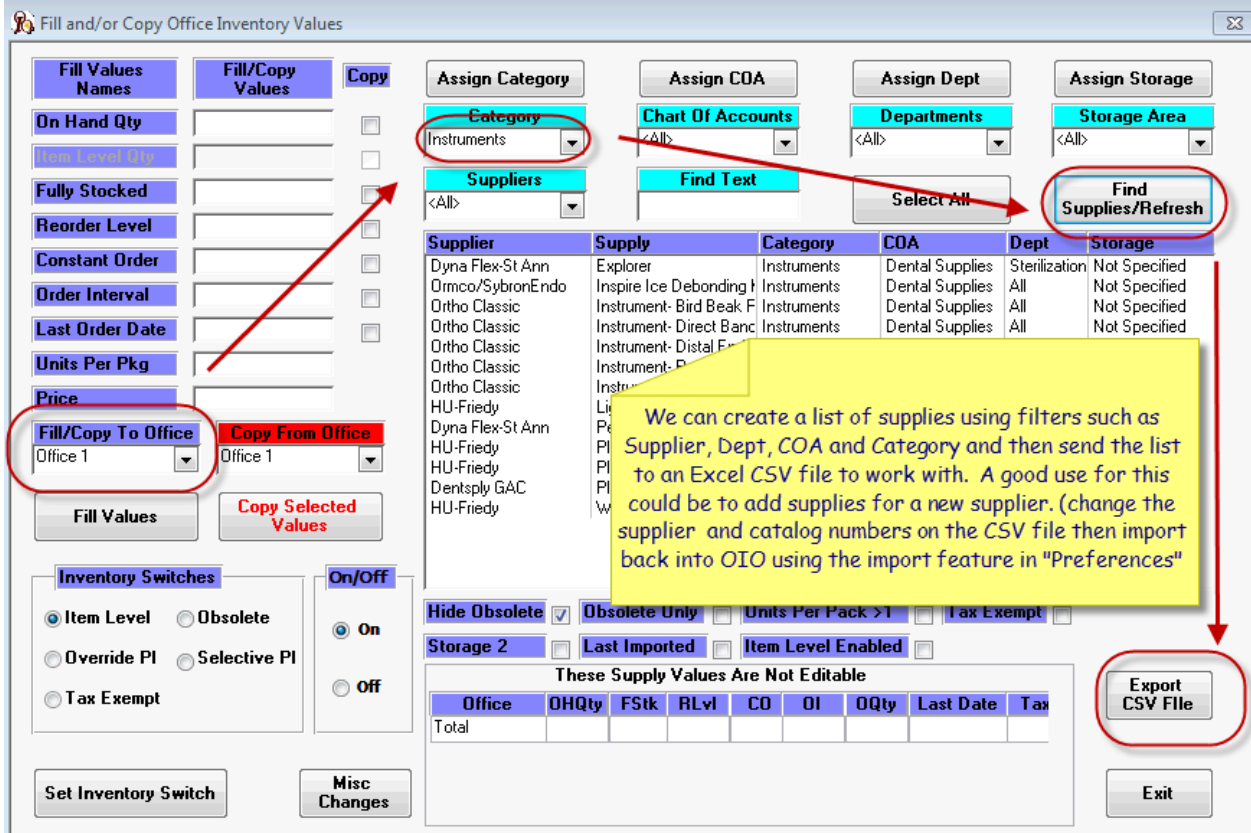
4. **Edit/Fill Screen:**

a. OIO now gives you the ability to edit supply names in Edit/Fill Screen:

Choose a supply, double click on it and OIO will Pop Up a screen that will allow you to edit the name of the supply. Name editing can still be done in the Supply screen as well, but editing would be easier here in Edit/Fill, especially if you have a lot of supplies to edit.



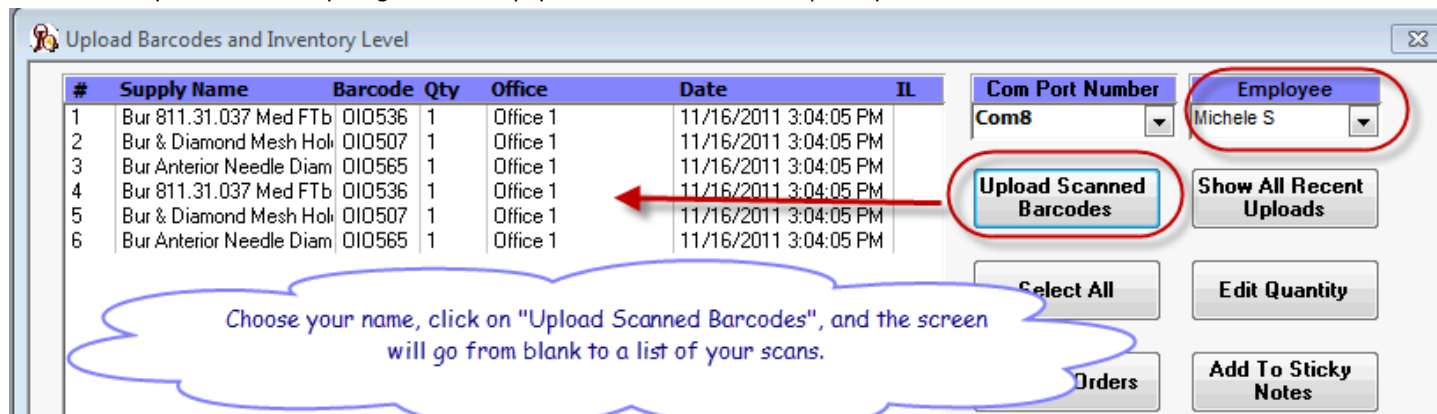
b. New Export To CSV file:



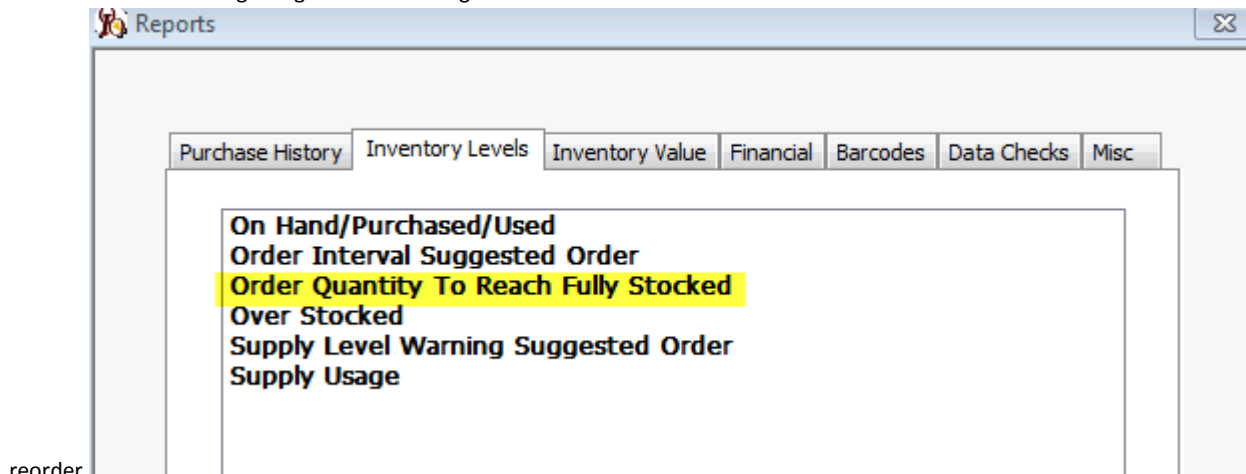
This is the resulting CSV file:

	A	B	C	D	E	F	G	H	I	J	K
1	Supplier	Supply	Catalog#	OnHand	OpenBox	ReOrder	FullyStock	Reg	OrderInte	LastOrderI	Office
2	Dyna Flex-St An	Explorer	1003503	9	0	0	0	0	0		Office 1
3	Ormco/SybronE	Inspire Ice Debonding Kit	803-0205	0	0	0	0	0	0		Office 1
4	Ortho Classic	Instrument- Bird Beak Pliers Premium Virg	60.91.340.30314	95	0	0	0	0	0	9/11/2011	Office 1
5	Ortho Classic	Instrument- Direct Band Removing Plier Sti	60.91.380.03356	7	0	0	0	0	0	9/11/2011	Office 1
6	Ortho Classic	Instrument- Distal End Safety Cutter Slim P	60.91.110.25503	44	0	0	0	0	0	9/11/2011	Office 1
7	Ortho Classic	Instrument- Posterior Band Remover Prem	60.92.380.01019	17	0	0	0	0	0	9/11/2011	Office 1
8	Ortho Classic	Instrument- Weingart Utility Plier Premiun	60.91.300.05023	17	0	0	0	0	0	9/11/2011	Office 1
9	HU-Friedy	Ligature Cutters	678-106	0	0	0	0	0	0		Office 1
10	Dyna Flex-St An	Perioprobe		0	0	0	0	0	0		Office 1
11	HU-Friedy	Plier Band Removing	678-207	0	0	0	0	0	0		Office 1
12	HU-Friedy	Plier Bird Beak (H)	678-304	0	0	0	0	0	0		Office 1
13	Dentsply GAC	Plier Bracket Positioner	ODG88002	0	0	0	0	0	0		Office 1
14	HU-Friedy	Weingart Slim	678-202	0	0	0	0	0	0		Office 1
15											
16											

5. **Barcode Upload:** Some offices that are Multiple Office Users and have scanners in each office have had the problem that scans for different offices were done at the same time and got mixed up with each other. Follow these steps if you wish to upload by employee/office.
 - a. Go to Preferences and choose "Upload Barcodes by Employee ID" (Middle purple section R side near bottom)
 - b. Go to each employee in the employee list and make sure they are assigned a default office (if not already assigned).
 - c. When you click on "Upload Barcodes and enter the upload screen you will either see:
 1. If you are using the OIO permissions and "Log In" functions your scan will automatically default to the person logged into OIO.
 2. OR – if you do not use Log in permissions, when you upload your scans the screen will be blank. You will need to go to the employee drop down list and choose your name. Once you do, click on the upload barcodes button and your scans will appear with your office already assigned. As always you can edit the office and quantity if desired.



6. **Reports:** We have added two new reports, (a) to assist with ordering for Perpetual Inventory systems and (b) to help you manage your On Hand Inventory Report.
 - a. A new report under the Inventory Levels tab, "**Order Quantity to Reach Fully Stocked**" will help offices that use the Perpetual Inventory method recognize not only what items are at or below reorder level now, but what items will soon be there – in case you want to order items that are getting close to needing



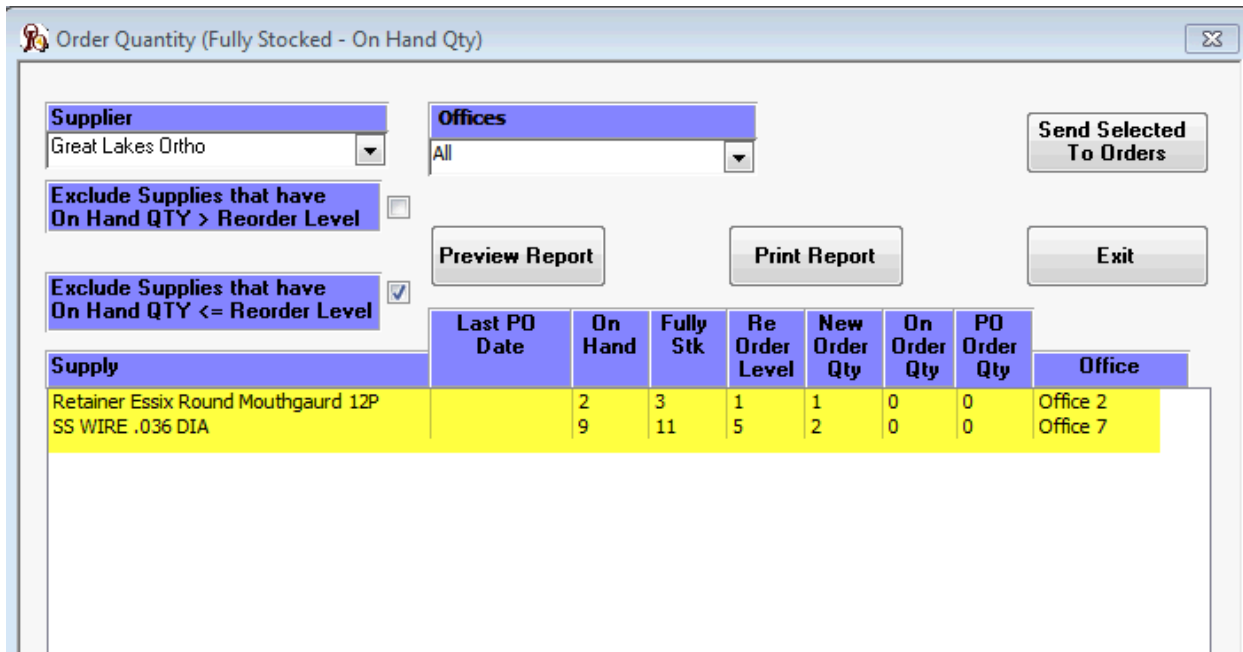
This report can be used in conjunction with the "Supply Level Warning Report" or even in lieu of it so that you can determine what your ordering needs are – and then send right to the order screen (by highlighting the supplies you want to send and then clicking the "Send Selected to Orders" button). Note that if you are using the new Preference "Ordering by Single Office" you can only send to orders for one office at a time and will need to filter the report by choosing an office before you click on "Send to Orders". You can "Exclude supplies that have an on hand quantity that is greater than the reorder level or ones that have an on hand quantity that is less than the reorder level - i.e. supplies that would appear on the "Supply Level Warning Suggested Order". The report must be used one supplier at a time. The first screen shot below shows all the supplies from Great Lakes Ortho with their corresponding values.

Supply	Last PO Date	On Hand	Fully Stk	Re Order Level	New Order Qty	On Order Qty	PO Order Qty	Office
Bur Carbided Cross Cut .040 Taper		1	2	1	1	0	0	Office 3
Flux 2 OZ GL0430	9/11/2011	4	10	5	6	0	0	Office 7
Polymer Rainbow Resin		0	1	0	1	0	0	Office 2
Retainer Essix Round Mouthguard 12P		2	3	1	1	0	0	Office 2
Retainer Essix Round Mouthguard 10P		1	3	1	2	0	0	Office 2
Retainer Essix Round Mouthguard 2mm/125i		1	3	1	2	0	0	Office 2
Retainer Essix Round Mouthguard 2mm/125i		1	3	1	2	0	0	Office 2
Solder Silver .040		21	50	25	29	0	99	Office 2
Solder Silver .040	9/24/2011	14	50	20	36	0	60	Office 3
SS WIRE .036 DIA		9	11	5	2	0	0	Office 7
SS Wire .040 Dia	8/19/2011	0	12	3	12	0	11	Office 3
SS Wire .040 Dia	9/23/2011	3	10	5	7	0	14	Office 7

In this next screen shot you can see what happens when we exclude supplies that have a qty > reorder level. Note that the two items highlighted in yellow above do not show up because their on hand qty exceeds their reorder level:

Supply	Last PO Date	On Hand	Fully Stk	Re Order Level	New Order Qty	On Order Qty	PO Order Qty	Office
Bur Carbided Cross Cut .040 Taper		1	2	1	1	0	0	Office 3
Flux 2 OZ GL0430	9/11/2011	4	10	5	6	0	0	Office 7
Polymer Rainbow Resin		0	1	0	1	0	0	Office 2
Retainer Essix Round Mouthguard 10P		1	3	1	2	0	0	Office 2
Retainer Essix Round Mouthguard 2mm/125i		1	3	1	2	0	0	Office 2
Retainer Essix Round Mouthguard 2mm/125i		1	3	1	2	0	0	Office 2
Solder Silver .040		21	50	25	29	0	99	Office 2
Solder Silver .040	9/24/2011	14	50	20	36	0	60	Office 3
SS Wire .040 Dia	8/19/2011	0	12	3	12	0	11	Office 3
SS Wire .040 Dia	9/23/2011	3	10	5	7	0	14	Office 7

We could also choose to look at this report without supplies that have a quantity on hand that is less than the reorder level. Note that it now only shows those two items we highlighted on the first version of this report – i.e. those that are already over the reorder level qty:



An example of the same information on the Supply Level Warning Report appears below:

SUPPLY LEVEL WARNING REPORT

Multiple Office Ortho

Supplies that the current inventory is below the reorder level... Supplier=Great Lakes Ortho

Supplier Name	Great Lakes Ortho						
Supply Item Description	Last Order	Current Stock	Reorder @	Fully Stkd	Order Qty	Office	
Bur Carbided Cross Cut .040 Taper	1/1/2010	1.0	1	2	1	Office 3	
Flux 2 OZ GL0430	1/1/2010	4.0	5	10	6	Office 7	
Polymer Rainbow Resin	1/1/2010	0.0	0	1	1	Office 2	
Retainer Essix Round Mouthguard 10P	1/1/2010	1.0	1	3	2	Office 2	
Retainer Essix Round Mouthguard 2mm/125	1/1/2010	1.0	1	3	2	Office 2	
Retainer Essix Round Mouthguard 2mm/125	1/1/2010	1.0	1	3	2	Office 2	
Solder Silver .040	9/21/2011	14.0	20	50	36	Office 3	
Solder Silver .040	9/21/2011	21.0	25	50	29	Office 2	
SS Wire .040 Dia	1/1/2010	3.0	5	10	7	Office 7	
SS Wire .040 Dia	1/1/2010	0.0	3	12	12	Office 3	

This is the Supply Level Warning Report for Great Lakes Ortho. Note that the information is the same as the new "Order Quantity to Reach Fully Stocked" Report with the option "Exclude Supplies that have Qty on Hand > Reorder Level"

b. Under the Tab Inventory Value there is a new report named, **"On Hand Inventory Extended"**. This report will allow you to filter the information about what stock you have on hand. This report will only be valid for offices using the Perpetual Inventory Method as others are not reducing stock as used so the stock quantity on hand will not be accurate. In the example below The supplier is Darby and the report is set up to show only items with fully stocked and reorder levels greater than zero.

On Hand Inventory
✕

Supplier
Darby Dental

Category
 All

Departments
 All

Offices
 All

Obsolete Options

- Show Not Obsolete
- Show Obsolete Only
- Show Obsolete and Not Obsolete

Include Zero Price

Only On Hand Quantity=0

Only On Hand Quantity>0

Only Fully Stocked=0

Only Fully Stocked>0

Only Reorder Level=0

Only Reorder Level>0

Only Order Interval=0

Only Order Interval>0

Multiple Office Ortho

Current On Hand Inventory filtered by Supplier=Darby Dental, No Obsolete Supplies, Fully Stocked>0, Reorder Level>0

Supply Item	Supplier	Office Name	Category	Catalog Number	Fully Stkd	Reorder Level	Order Interval	Price	On Hand	Total	
Alginate Kromopan 100 1lb pouch											
	DarbyDental	Office 2	Supplies-Cli	9655000	20	10	0	\$7.85	46	\$361.10	
									Supply Totals	46	\$361.10
Cavicide Disinfectant Wipes Gal											
	DarbyDental	Office 2	Chem icals	9541200	12	6	0	\$6.63	0	\$0.00	
									Supply Totals	0	\$0.00
Cavicide Gallon											
	DarbyDental	Office 2	Chem icals		12	6	0	\$28.95	2	\$57.90	
	DarbyDental	Office 4	Chem icals		4	2	0	\$28.95	2	\$57.90	
									Supply Totals	4	\$115.80
Caviwipes- Darby											
	DarbyDental	Office 4	PPE/Univers	9541206	120	60	0	\$6.63	68	\$450.84	
	DarbyDental	Office 7	PPE/Univers	9541206	70	20	0	\$6.63	70	\$464.10	
	DarbyDental	Office 2	PPE/Univers	9541206	120	60	0	\$6.63	27	\$179.01	
	DarbyDental	Office 5	PPE/Univers	9541206	60	30	0	\$6.63	102	\$676.26	
	DarbyDental	Office 3	PPE/Univers	9541206	72	36	0	\$6.63	0	\$0.00	
									Supply Totals	267	\$1,770.21
Elastics Hook Attacher Plastic pk/1											
	DarbyDental	Office 2	Supplies-Cli	401800	10	5	0	\$12.51	0.0	\$0.00	
									Supply Totals	0	\$0.00

7. **NEW!!! Export Invoices to QuickBooks Add-On: - Additional Fee \$599.00**

After posting your PO's received and assigning a supplier invoice number, you can now export the information right into your QuickBooks Accounts Payable. The Feature will not only save a great deal of time entering invoices into QuickBooks, it will help you verify that your OIO reports are accurate and correspond to your QuickBooks financial reports.

Edit Qty Ordered or BO Received

Office	Order	Recvd	OnHand
Office 1	4	4	4
Office 2	0	0	0
Office 3	0	0	2
Office 4	0	0	0

Price: \$23.37
 Sand H: \$15.95
 Tax: \$28.68
 Catalog#: 085-032
 Discount: None
 Order Date: 09/20/11
 Employee:
 Offices: <All>
 Find:

Buttons: Post Received Date, Undo Received Date, Post Invoice Number, Post Invoice Date, Post Back Order, Add To PO, OK, Set Item As Coupon, Show Drop Shipments, Show Back Orders, Show Discounts, Print Storage Report, Book Keeping Cost Report, Return To Open Orders, Delete PO Item, Show QB Exports, QB Export Report, Export QBs File, Include Received Only, Exclude QB Exports.

QuickBooks Export File & Report buttons appear once the module is activated.

PO#	Supplier	Supply Item	Catalog#	Qty	Price	Total	Ordered	Promise	Received	Invoice #	BO	DI	QB
145	Great Lakes Ortho	Bur Acrylic Bur	085-032	4	\$23.37	\$93.48	09/20/11	10/11/11	09/09/11	GL145			
145	Great Lakes Ortho	Bur Taper .045	085-034	4	\$22.06	\$88.24	09/20/11	10/11/11	09/09/11	GL145			
145	Great Lakes Ortho	SS WIRE .036 DIA	265-037	8	\$2.34	\$18.72	09/20/11	10/11/11	09/09/11	GL145			
145	Great Lakes Ortho	SS Wire .040 Dia	265-038	64	\$2.30	\$147.20	09/20/11	10/11/11	09/09/11	GL145			
144	Great Lakes Ortho	Curing Light w/o Meter	190-120	6	\$1,550.00	\$9,300.00	09/20/11	09/06/11	09/06/11				
143	Great Lakes Ortho	Curing Light w/o Meter	190-120	2	\$1,550.00	\$3,100.00	09/20/11	09/06/11	09/06/11				

The Bookkeepers report shows PO 145 breakdowns below:

Multiple Office Ortho

Purchase Orders

Supplier	Supply	Catalog #	PO #	Received	QTY	Discount	FX Price	Price	Tax Exempt	Taxable	Sub Total	
Great Lakes Ortho	SS Wire .040 Dia	265-038	145	9/9/2011	64			\$2.30	\$0.00	\$147.20	\$147.20	
Great Lakes Ortho	SS WIRE .036 DIA	265-037	145	9/9/2011	8			\$2.34	\$0.00	\$18.72	\$18.72	
Great Lakes Ortho	Bur Taper .045	085-034	145	9/9/2011	4			\$22.06	\$0.00	\$88.24	\$88.24	
Office 1 Office Sub Totals										\$0.00	\$254.16	\$254.16
Dental Supplies COA Sub Totals										\$0.00	\$254.16	\$254.16
Great Lakes Ortho	Bur Acrylic Bur	085-032	145	9/9/2011	4			\$23.37	\$0.00	\$93.48	\$93.48	
Office 1 Office Sub Totals										\$0.00	\$93.48	\$93.48
Lab Supplies COA Sub Totals										\$0.00	\$93.48	\$93.48
Great Lakes Ortho	.S and H		145	9/9/2011	1			\$15.95	\$0.00	\$0.00	\$15.95	
Office 1 Office Sub Totals										\$0.00	\$0.00	\$15.95
S and H COA Sub Totals										\$0.00	\$0.00	\$15.95
Great Lakes Ortho	.Tax		145	9/9/2011	1			\$28.68	\$0.00	\$0.00	\$28.68	
Office 1 Office Sub Totals										\$0.00	\$0.00	\$28.68
Tax COA Sub Totals										\$0.00	\$0.00	\$28.68
GL145 Invoice Sub Totals										\$0.00	\$347.64	\$392.27
Totals										\$0.00	\$347.64	\$392.27

This is the QuickBooks invoice that was imported as an "IIF" file thru QuickBooks Utilities: Note that the "Class" in Quickbooks allows you to break out costs by office.

Enter Bills

Previous Next Save Find History Attach

Bill Credit Bill Received

Bill

Vendor Great Lakes Ortho Date 10/11/2011

Address Ref. No. GL145

Amount Due 392.27

Terms Bill Due 11/10/2011

Memo OIO PO # = 145

Expenses	\$392.27	Items	\$0.00		
Account	Amount	M.	C.	Billable?	Class
60110 · Lab Supplies	93.48				Office 1
60100 · Dental Supplies	254.16				Office 1
60100 · Dental Supplies:Shipping/hand	15.95				Office 1
60100 · Dental Supplies:Tax	28.68				Office 1

If you are interested in purchasing this add-on for QuickBooks integration, please contact FoxFales at 941-480-9440 to set up an online session to help you set up OIO COA's to correspond with your QBooks chart of accounts and to teach you how to use the functions.