Stock level management

Last Modified on 22/07/2024 9:51 am AEST

Stock levels are automatically updated as stock is used in clinical encounters. However, there are times when you will want to make a manual stock adjustment, for example, if a vaccine vial was broken or a dose unused.

Manual stock adjustments

To manually adjust stock:

1. Go to Zedmed's **Management** tab.
2. Select **Stock Management.**

   The **Stock Management** UI will open in your web browser (Chrome).
3. Locate the row for the product or sub-product.
4. Select the **+** or **-** icon in the **Current Stock** column.

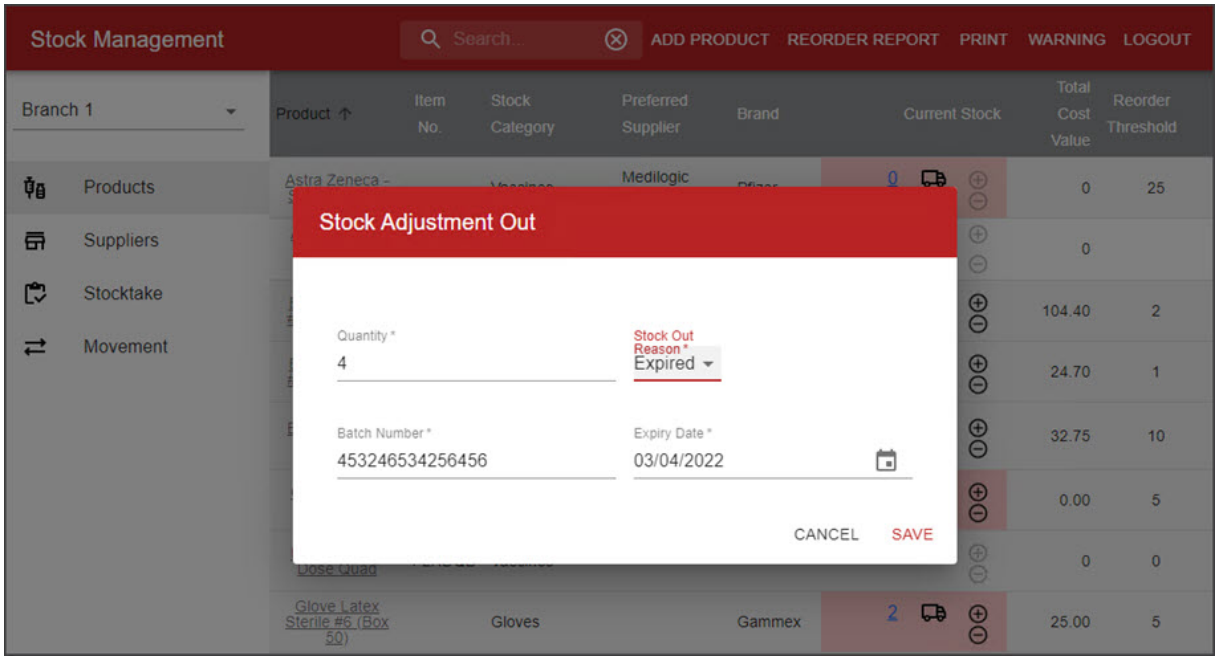
   + Opens the **Stock Adjustment in** screen that is used to increase stock.

   - Opens the **Stock Adjustment out** screen that is used to decrease stock.
5. Use the **Stock In Reason** / **Stock Out Reason** drop-down to select a reason for the adjustment.

   To add a custom reason, see the Stock Management Setup guide Movement Reasons section.
6. In the **Quantity** field, enter a number for the adjustment. Do not enter + or - in this field.
7. Enter the correct **Batch Number** and **Expiry Date**. These must match the correct pair of **Batch Number** and **Expiry Date** used when the stock was added to the system.

   To check the batch number or expiry date, select the product then select the **Stock History** tab.
8. Select **Save** to make the adjustment.

> **Note**: If a batch number is required, select the product's **Current Stock** number to open the **Edit Product** screen. This will default to the **Product Details** tab, which will show the **Batch Number** of each batch of stock received.



Expired stock

Some vaccine vials are split into doses (sub-products), and the vaccine (vial) can expire the day it's opened, leading to multiple doses being lost from multiple vials each day. These will require manual stock adjustments out, and the adjustments need to be entered by Batch Number / Expiry Date if the Vaccine has Batch Number / Expiry Date ticked as a requirement in the Product details.

To monitor or review these adjustments, select the **Movement** menu and use the **Reason** filter to show the **Stock Out Reason**.

Stock Movement reporting

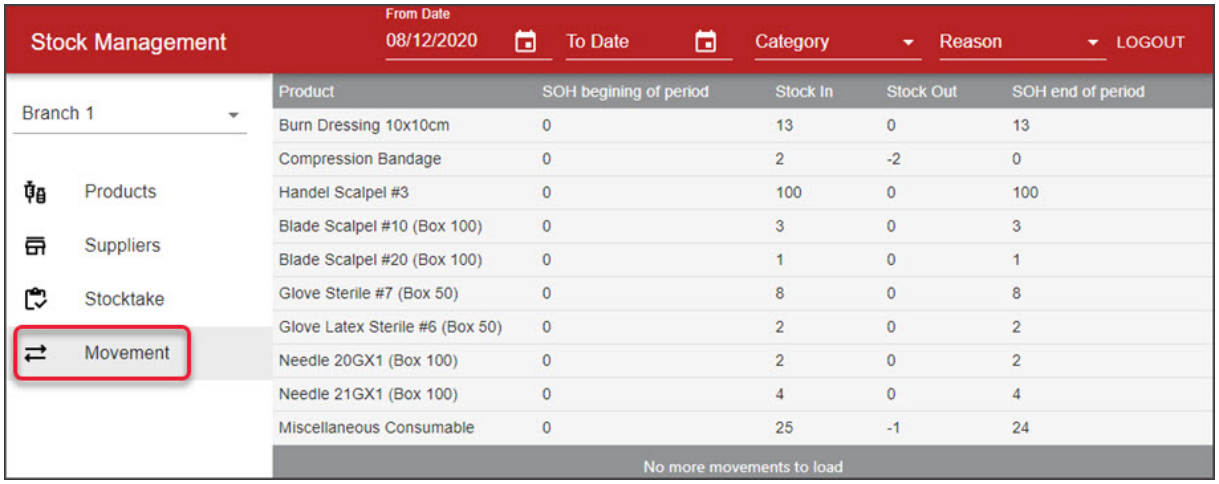
Stock Management allows you to view stock movements and filter those movements by date range, product category and reason using the **Movement** screen.

To view stock movement:

1. Select **Movement** on the left menu.

   Your stock movements will be displayed.
2. Use the **From Date** and **To Date** fields to set the period you would like to view the stock movements for.

   You can use the **Category** and **Reason** field to filter the results displayed.



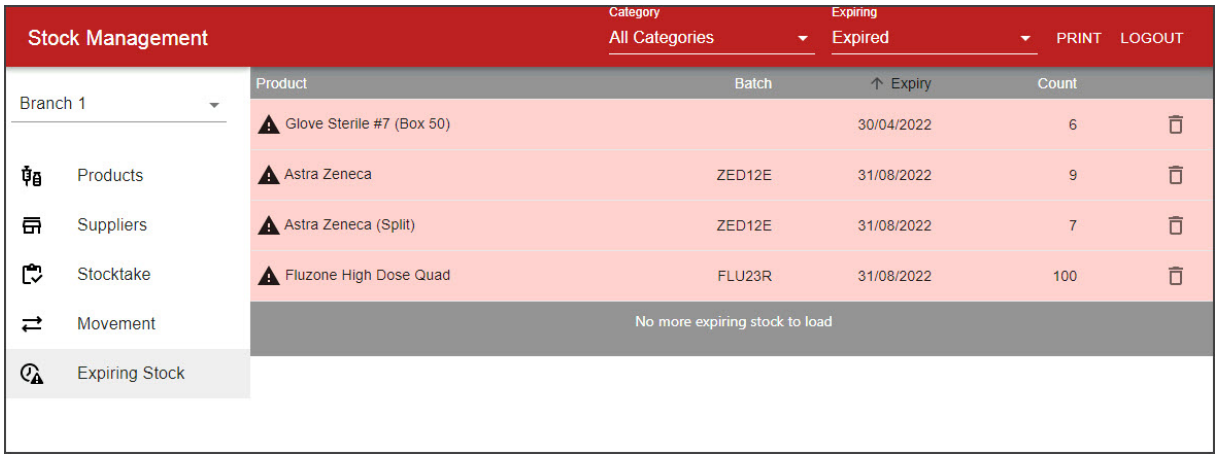
Expiring Stock management

Stock Management allows you to view a batch of stock that has expired or is about to expire and remove it with an automatic stock adjustment.

To view Expiring Stock:

1. Select **Expiring Stock** on the left menu.

   Any Expired Stock will be displayed by default.
2. Review and manage expiring stock as follows:
   - Use the **Category** drop-down to filter the products shown.
   - Use the **Expiring** drop-down and select **2, 7** or **14 days** to view stock that is due to expire.
   - Use the **Delete** icon to remove the expired or expiring batch or stock. This will automatically process a stock adjustment with the reason **Expired**.
3. Use the **Print** option to show the expiring stock report and print it or save it as a PDF.



Perform a stocktake

Perform a stocktake using Zedmed Stock Management's dedicated stocktake screen. Enter your stock count results for each product, produce a stocktake report then use the Finalise button to automatically adjust the stock of each product to the correct levels.

To perform a stocktake using Stock Management:

1. Go to Zedmed's **Management** tab.
2. Select **Stock Management.**

   The **Stock Management** UI will open in your web browser (Chrome).
3. Select **Stocktake** on the left menu.
4. Select **Start Stocktake.**

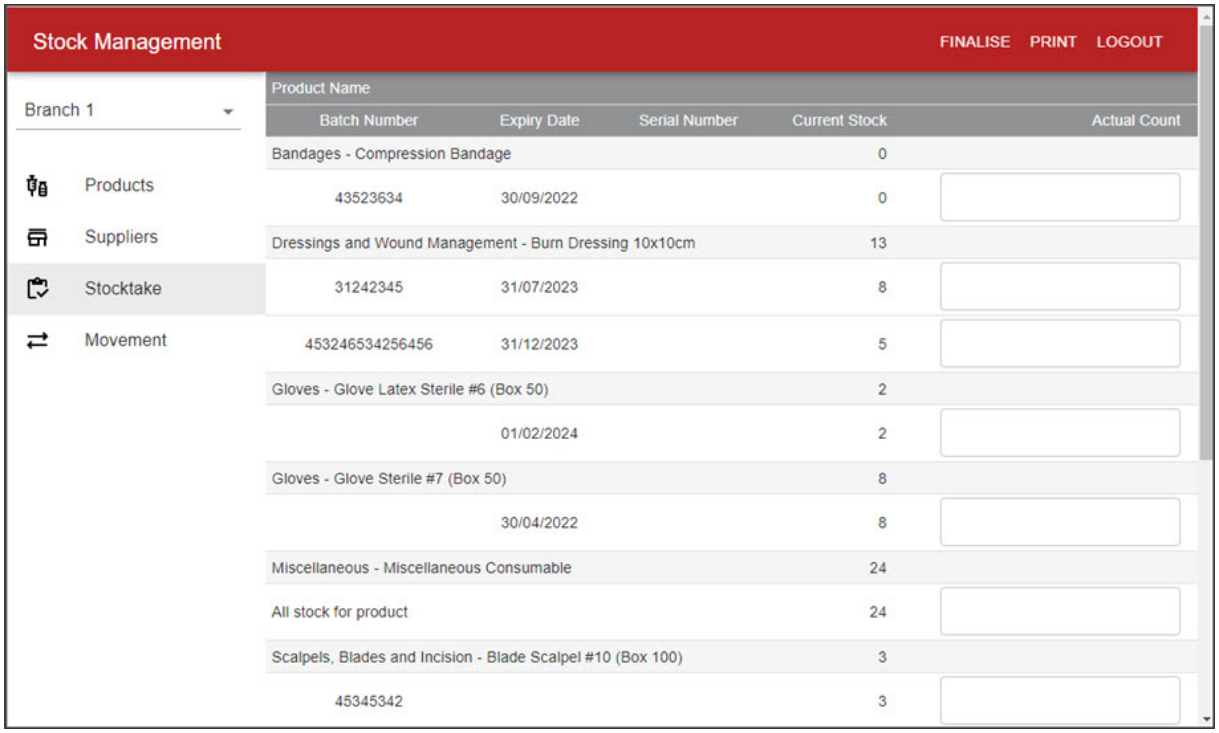
   The stocktake screen will open with a list of all products, current stock and entry fields for the stock count.
5. Follow the practice's stocktake process and count the products.

   Considerations:
   - Products with batch numbers should be counted per batch.
   - Count products in groups based on the **Actual Count** field.
   - Sub-products like doses in a vial are supported and counted.
   - 0 stock will show if there's been a stock adjustment for the item, and will still show in case there's unrecorded stock.
6. Add the counts into the fields provided.

   Stock counts must be entered for all products. You won't be able to finalise the stocktake if there are empty **Actual Count** fields.
7. Select **Print** if you want to print the report, or select the download icon on the print page to save it as a PDF.
8. Select **Finalise** when you're ready to finalize the stocktake.

   This will adjust your stock levels to match the actual stock and cannot be undone.
9. Select **Continue** to confirm.

   You will now go back to the Stock Management screen and all stock will reflect the correct stock levels from the count.

   Any adjustments to the products will be reflected in the products **Stock History** tab as **Reason** - **Stocktake**.

   To view a product's history, select it to open the **Edit Product** screen and select the Stock History tab.