

SUPPLY ORDERS

Creating Supply Orders doesn't have to be **SCARY!**

Once you've set up Supply Inventory, follow these easy steps to create and manage Supply Orders in Open Dental



INITIAL SETUP

Before creating Supply Orders, make sure Suppliers, Supply Categories, and Supplies have been set up.

TRACK SUPPLIES NEEDED

As staff notice supplies running low or a need for a certain supply, they can quickly add it to the *Supplies Needed* list.

SELECT ORDERS

Click Orders from the Supply Inventory window to open the Supply Orders list.

SELECT A SUPPLIER

Select an existing Supplier from the drop down list. If the Supplier is not in the drop down, they must be added before creating an order.

CREATE A NEW ORDER

Click +New Order to add a pending order to the Order History list.

ADD SUPPLIES

Click +Add to add Supplies to the Supplies on One Order list. Reference the *Supplies Needed* list for supplies staff have noted as low.

EDIT ORDER DETAILS

Once the order has been placed, double-click the order from the Supply Orders list to input the *Date Placed*, *Placed By*, *Shipping Charge*, and *Notes*.

MARK THE ORDER RECEIVED

Once the order has been received by your office, double-click the order from Order History and enter the *Date Received* and any additional *Notes*.

CLEAR OUT SUPPLIES NEEDED

Once your order has been received, make sure to delete any items from the *Supplies Needed* so they are not re-ordered.

