DIGITAL VISION

INVENTORY

LENS FRAMES MISC

Keeping it CLEAN!!!!

Josh Bingenheimer Joseph Callahan Kevin Chan Scott Prisbrey

INVENTORY OVERVIEW

As labs continue to become more of a one stop shop, inventory management has become more and more important. It used to just be all about lenses, everything else was just a miscellaneous headache to deal with.

Labs are dealing in frames and misc items to provide better service to the ECP's. In doing so it has become a very intricate part of the labs processes and setups.

The importance of maintaining a clean and correct inventory include:

- Utilizing lab specific functions as well as Combobulator setups
- Controlling cost
- Improving turn time and service levels
- Satisfying auditors
- Ease of use for employees, especially 'newbies'

INVENTORY OVERVIEW

DVI has worked very hard at expanding the various avenues in which you are able import data for inventory items for ease of use.

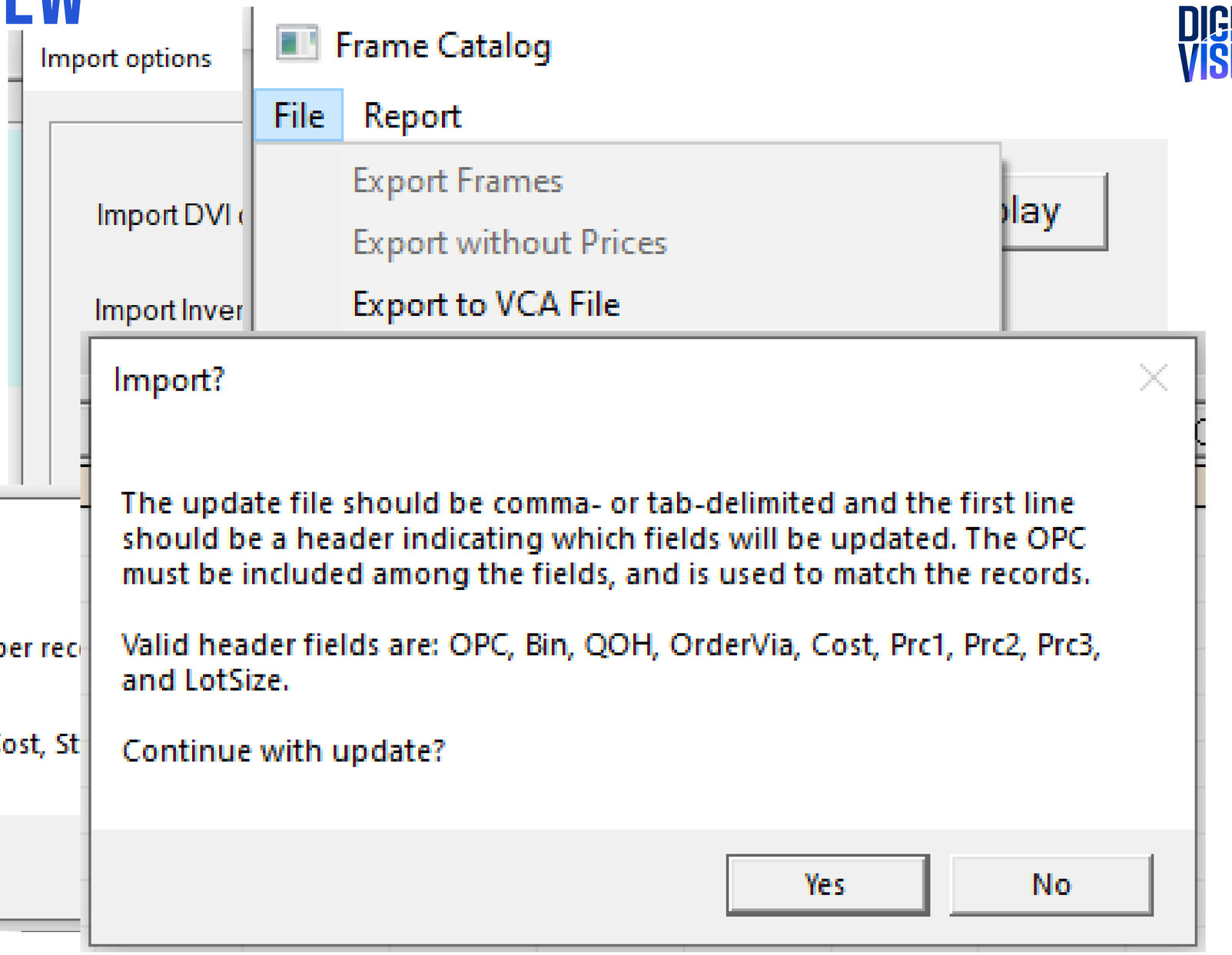
But wait, remember to……

- ✦ Manage your vendor list <2,3,5,5>
  - Import tool F5
  - Confirm backorder policies
  - Confirm Ordering logic for proper inventory levels
- ✦ Download Lens Data <5,2,1>
- ✦ Download Frame Data <5,2,1>

INVENTORY OVERVIEW

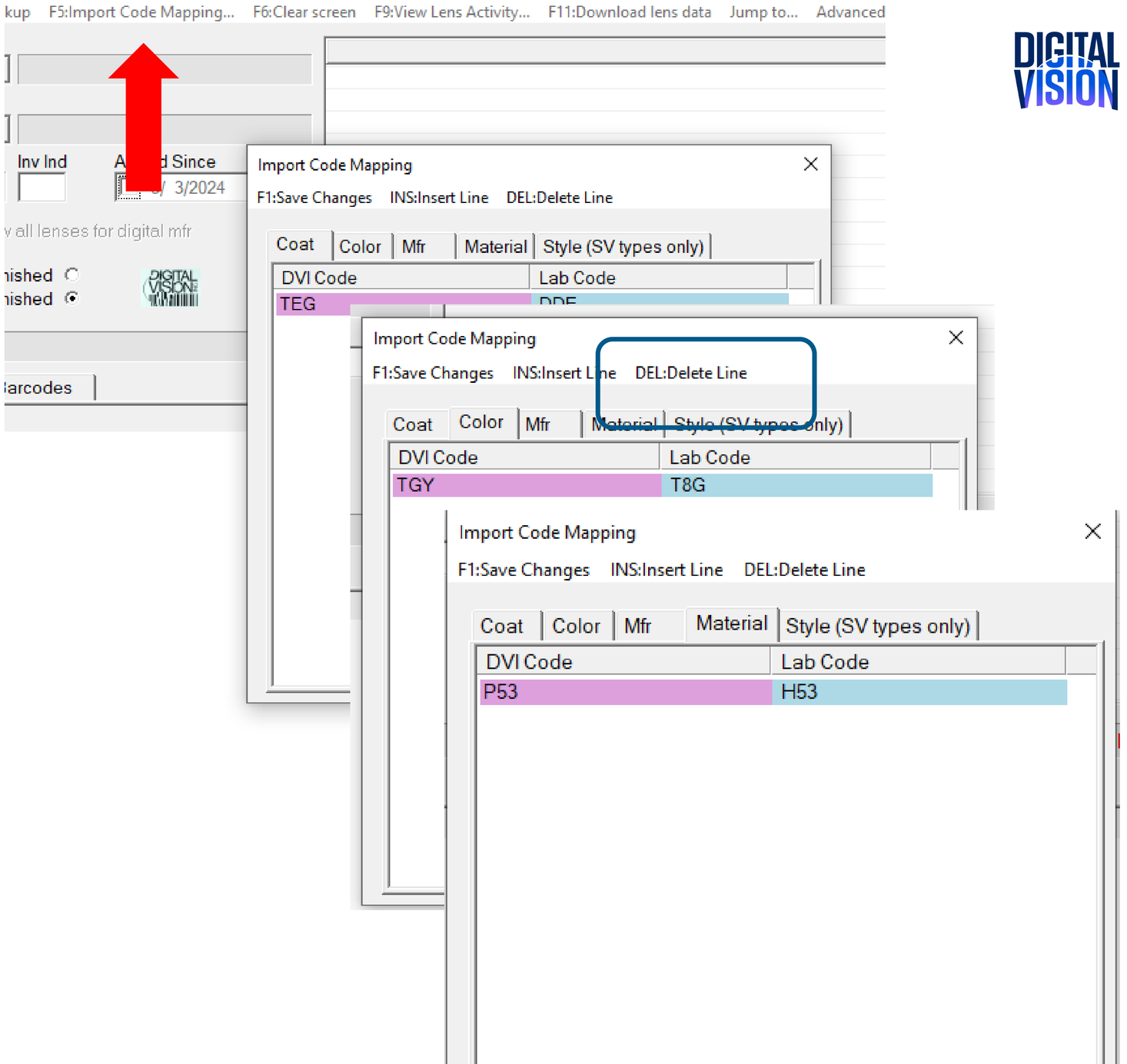
Avenues in which to import data, depending on type:

- Lens Inquiry <3,1,2>
- Frames Database <3,2,1,1>
- Misc item import
- Update from CSV



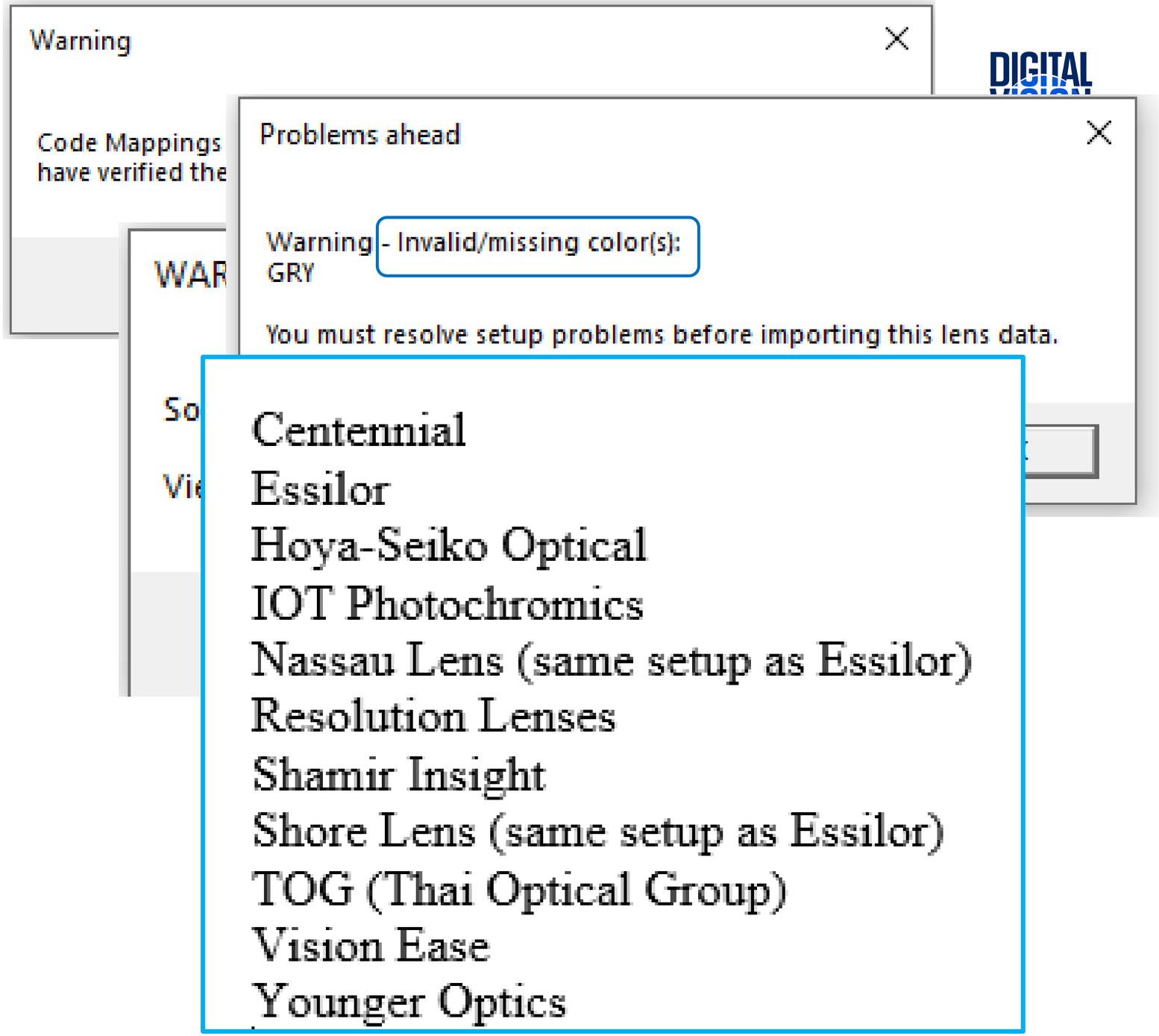
LENS SPECIFIC TOOLS

- Using the import code mapping from Lens Inquiry.
  - Be sure to review the saved setup before importing new products to avoid confusion
  - If it is a one-time map, then be sure to remove it after using it



LENS SPECIFIC TOOLS

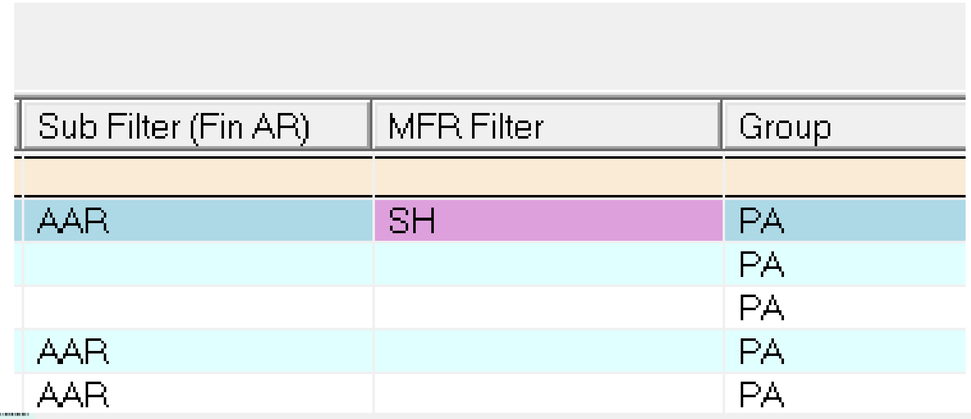
- DVI gives you as much heads up as possible both before and after importing.
- We also warn, when you are importing missing products from the <4823> menu
- Lens Cost importing
  - Handled in Lens Inventory Editor <363>
  - Verify if the cost in the file represents per unit or per pair before importing
  - Reuse the same file over and over as you add lenses to your inventory.
  - Costs can also come through Opticom

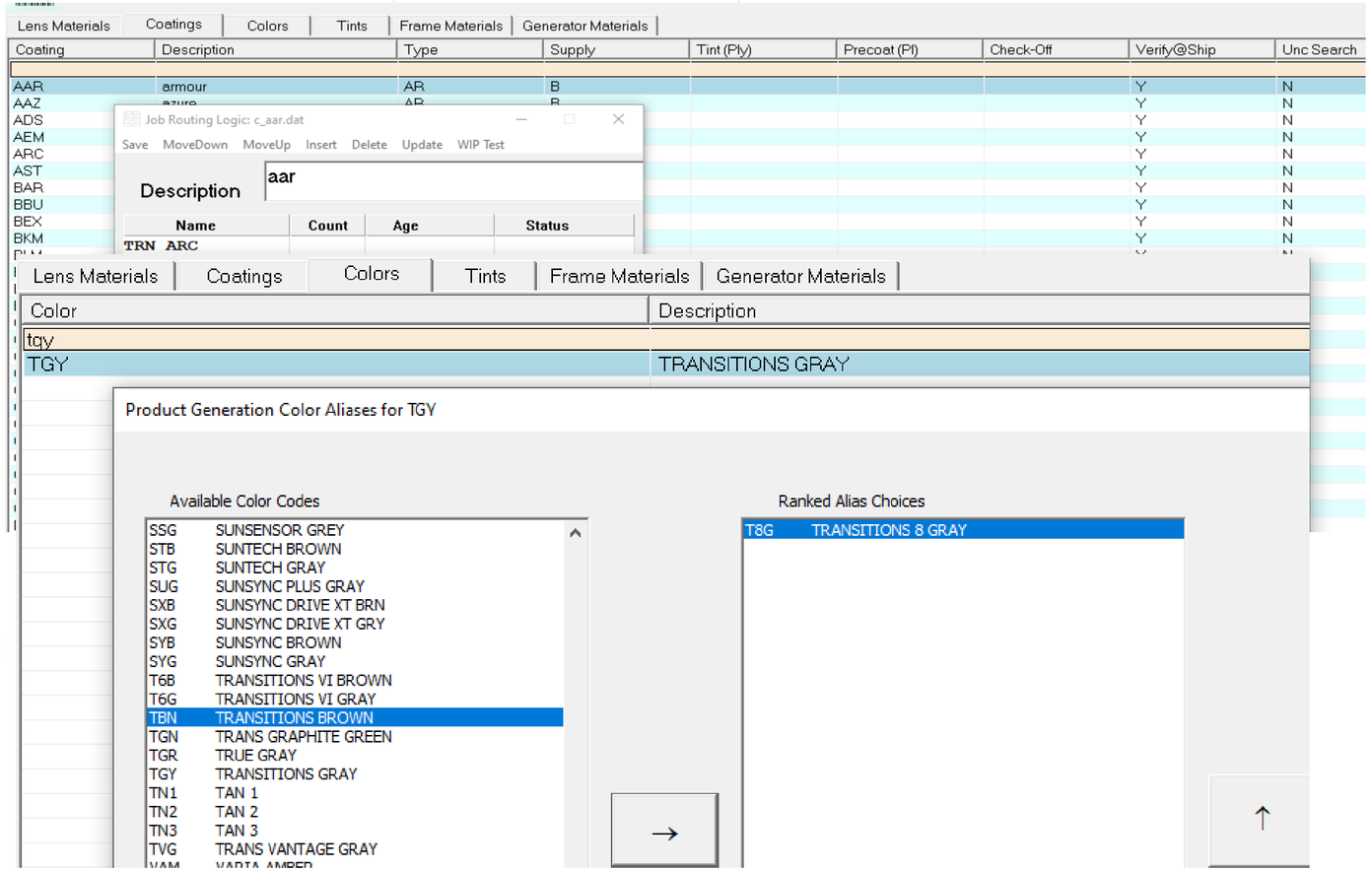


LENS SPECIFIC TOOLS

Other options in controlling your inventory

- Coat manufacturer filter
  - Used to put a coating onto a specified manufacturer's lenses
- Coat substitution
  - Used to point an ordered coat to a lab preferred coat
- Color aliasing
  - Used to point an ordered color to a lab preferred color
  - Useful for Transitions generation changes





INVENTORY ITEM RECOMMENDATIONS

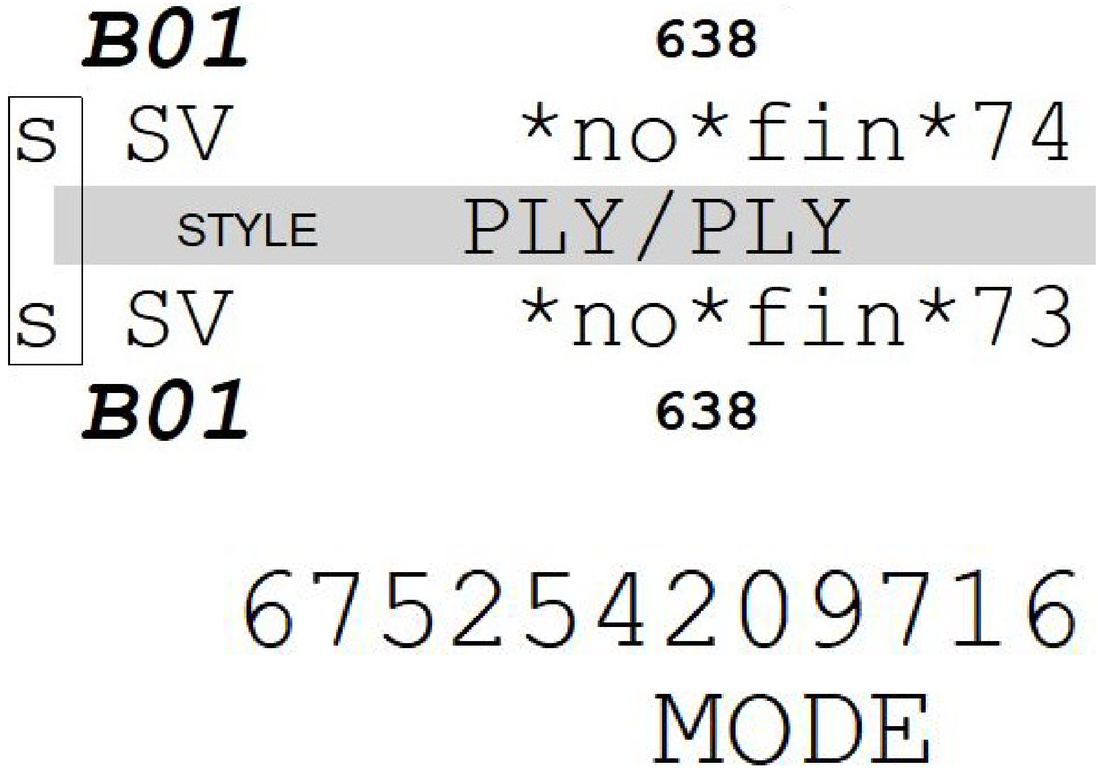
Frames, Lenses, Miscellaneous

- Items should have OPCs (lenses) or UPCs (frames and miscellaneous)
  - OPCs/UPCs are required for
    - Ordering via Opticom
    - Stockroom (lens and frames) logging and reconciliation
  - OPCs/UPCs make the cycle counting and physical inventory process much easier

WORKTICKET POINTERS

Frames and Lenses

- The last three digits of the OPC and the full UPC prints on the workticket
  - These fields are also available to print on various forms
  - Workticket also shows if a lens is in stock (s) or out of stock (o)
  - Lens bin number also prints



INVENTORY ITEM RECOMMENDATIONS

Frames, Lenses, Miscellaneous

- Items should have bin locations defined
  - Bin locations for frames and lenses also print on DVI worktickets and are an available field for labels
  - Bin locations are required for cycle counting
  - Bin locations help inexperienced employees find frames/lenses easier

BIN REPORT

Frames and Lenses

- Bin report shows the number of line items currently in bins
    - Shows the lab an uneven distribution of items
    - Analyzing the report can help a lab set up for successful cycle counting

Defined Bin Report - DVI Workshop 2024	
Bins (58)	Line Items
B01	2
B02	1
B03	9
B04	30
B05	23
B06	19
B07	43
B08	19

INVENTORY ITEM RECOMMENDATIONS

Frames and Lenses

- Bin locations can be set manually or using the Teach Bins feature location within the Inventory Editor <3,6,3> or <3,2,8,7,1> “Advanced” > “Teach Bins”

Teach Bins to Inventory Records

New bin: K05

OPC:

F/S	Mat	Style	MF	Sz	Col	Cot	Ind	Box...	Sph/...	Cyl/...	Stat	OPC-R	OPC-L	Bin
F	P	SV	ES	70	CLR	COT			+0.50	0.00	N	0214688608	0214688608	
F	P	SV	ES	70	CLR	COT			-7.75	0.00	N	0214692345	0214692345	
F	P	SV	ES	70	CLR	COT			-8.00	0.00	N	0214692360	0214692360	K05

CYCLE COUNTING

Frames, Lenses, Miscellaneous

- Items should be cycle counted on a daily basis
- The daily process should take no more than fifteen minutes
- The goal is to count a manageable amount of items a day, such as one shelf
- Accurate counts lead to better orders and save the lab money by avoiding costly short orders
- Variance reports provide a picture of areas that may need improvement
  - It is especially important to pay attention to large variances
- Full physical inventory counts can be done as needed
  - Often depends on variance percentage of cycle counts

INVENTORY REPORTS

Frames, Lenses

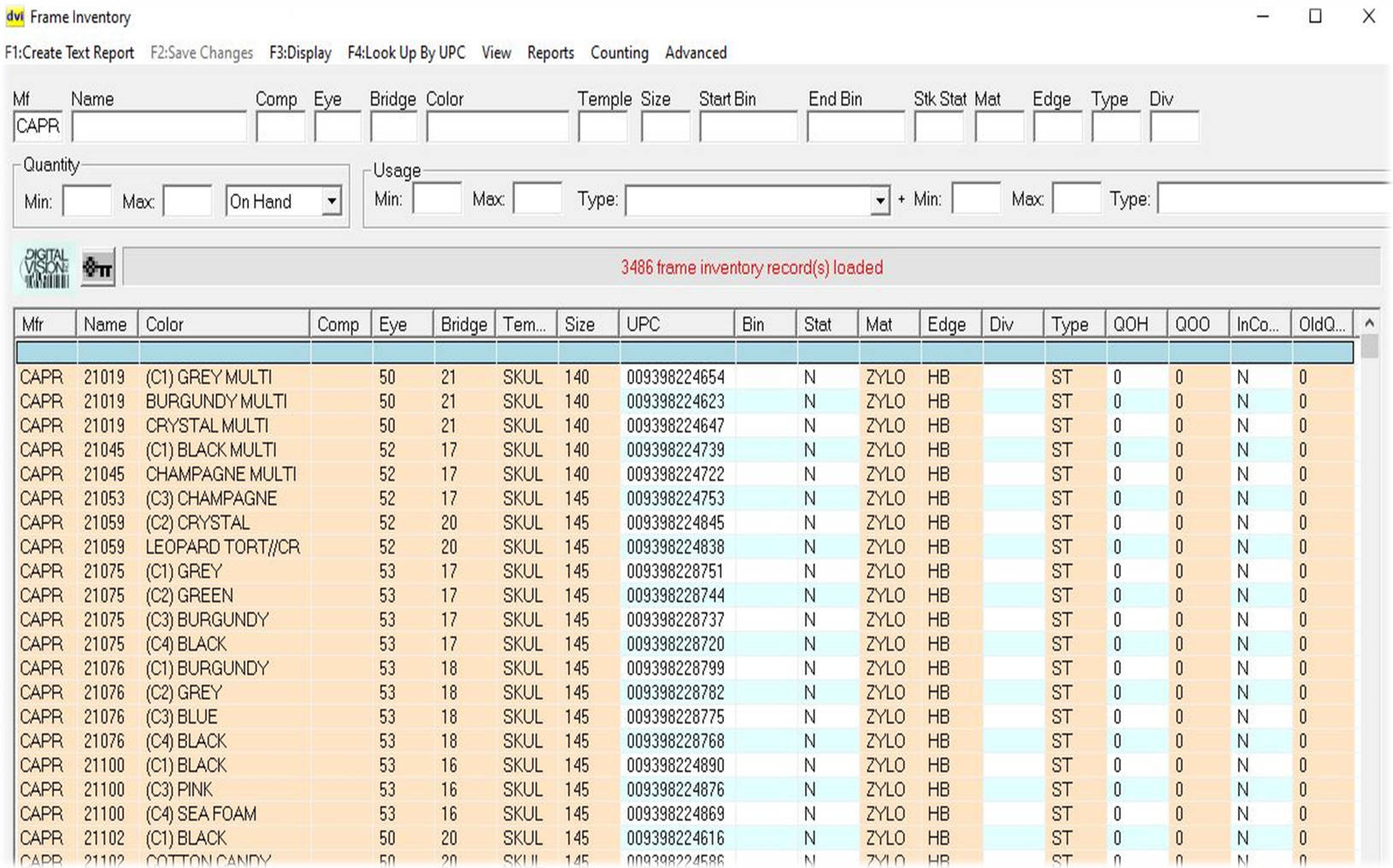
- Standard reports such as overstock/understock reports should be run to help fine tune what the lab's inventory
- For lenses, additional reports should be run such as:
  - Fill rate (lenses filled with stock inventory v. lenses filled via short orders)
    - Low fill rate percentage means that the lab should look to stock more of those lenses that are often being short ordered
  - Lens Anomalies (logged lenses without QOH)
  - Pick Errors (Instances at stockroom logging where an attempt was made to pick something other than the lenses that the software wanted to use)
    - May uncover unnecessary lens substitutions and training opportunities

INVENTORY EDITOR

Frames, Lenses, Miscellaneous

All of the Inventory Editor programs are now updated to use the Windows GUI (graphical user interface). Common features include:

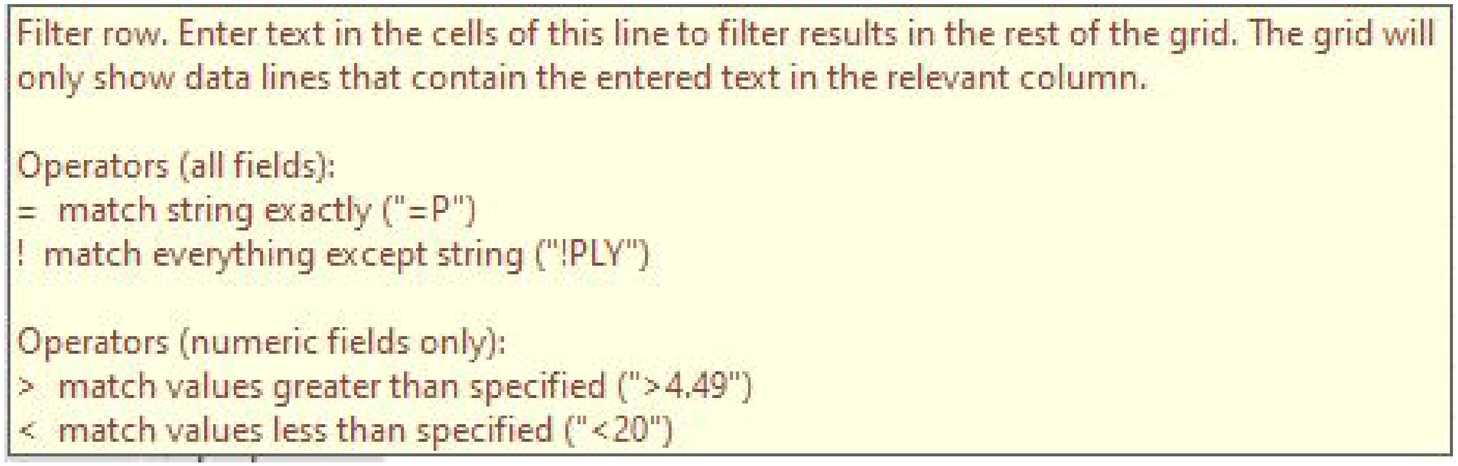
- Cycle counting
- Filter and search functions, including new cell math
- Export to Excel or text and update from CSV
- Right-click menu options (eg move/copy/delete records)
- Variance history



Mfr	Name	Color	Comp	Eye	Bridge	Tem...	Size	UPC	Bin	Stat	Mat	Edge	Div	Type	QOH	QOO	InCo...	OldQ...
CAPR	21019	(C1) GREY MULTI		50	21	SKUL	140	009398224654		N	ZYLO	HB		ST	0	0	N	0
CAPR	21019	BURGUNDY MULTI		50	21	SKUL	140	009398224623		N	ZYLO	HB		ST	0	0	N	0
CAPR	21019	CRYSTAL MULTI		50	21	SKUL	140	009398224647		N	ZYLO	HB		ST	0	0	N	0
CAPR	21045	(C1) BLACK MULTI		52	17	SKUL	140	009398224739		N	ZYLO	HB		ST	0	0	N	0
CAPR	21045	CHAMPAGNE MULTI		52	17	SKUL	140	009398224722		N	ZYLO	HB		ST	0	0	N	0
CAPR	21053	(C3) CHAMPAGNE		52	17	SKUL	145	009398224753		N	ZYLO	HB		ST	0	0	N	0
CAPR	21059	(C2) CRYSTAL		52	20	SKUL	145	009398224845		N	ZYLO	HB		ST	0	0	N	0
CAPR	21059	LEOPARD TORT//CR		52	20	SKUL	145	009398224838		N	ZYLO	HB		ST	0	0	N	0
CAPR	21075	(C1) GREY		53	17	SKUL	145	009398228751		N	ZYLO	HB		ST	0	0	N	0
CAPR	21075	(C2) GREEN		53	17	SKUL	145	009398228744		N	ZYLO	HB		ST	0	0	N	0
CAPR	21075	(C3) BURGUNDY		53	17	SKUL	145	009398228737		N	ZYLO	HB		ST	0	0	N	0
CAPR	21075	(C4) BLACK		53	17	SKUL	145	009398228720		N	ZYLO	HB		ST	0	0	N	0
CAPR	21076	(C1) BURGUNDY		53	18	SKUL	145	009398228799		N	ZYLO	HB		ST	0	0	N	0
CAPR	21076	(C2) GREY		53	18	SKUL	145	009398228782		N	ZYLO	HB		ST	0	0	N	0
CAPR	21076	(C3) BLUE		53	18	SKUL	145	009398228775		N	ZYLO	HB		ST	0	0	N	0
CAPR	21076	(C4) BLACK		53	18	SKUL	145	009398228768		N	ZYLO	HB		ST	0	0	N	0
CAPR	21100	(C1) BLACK		53	16	SKUL	145	009398224890		N	ZYLO	HB		ST	0	0	N	0
CAPR	21100	(C3) PINK		53	16	SKUL	145	009398224876		N	ZYLO	HB		ST	0	0	N	0
CAPR	21100	(C4) SEA FOAM		53	16	SKUL	145	009398224869		N	ZYLO	HB		ST	0	0	N	0
CAPR	21102	(C1) BLACK		50	20	SKUL	145	009398224616		N	ZYLO	HB		ST	0	0	N	0
CAPR	21102	COTTON CANDY		50	20	SKUL	145	009398224586		N	ZYLO	HB		ST	0	0	N	0

FILTER LINE CELL MATH [WSR]

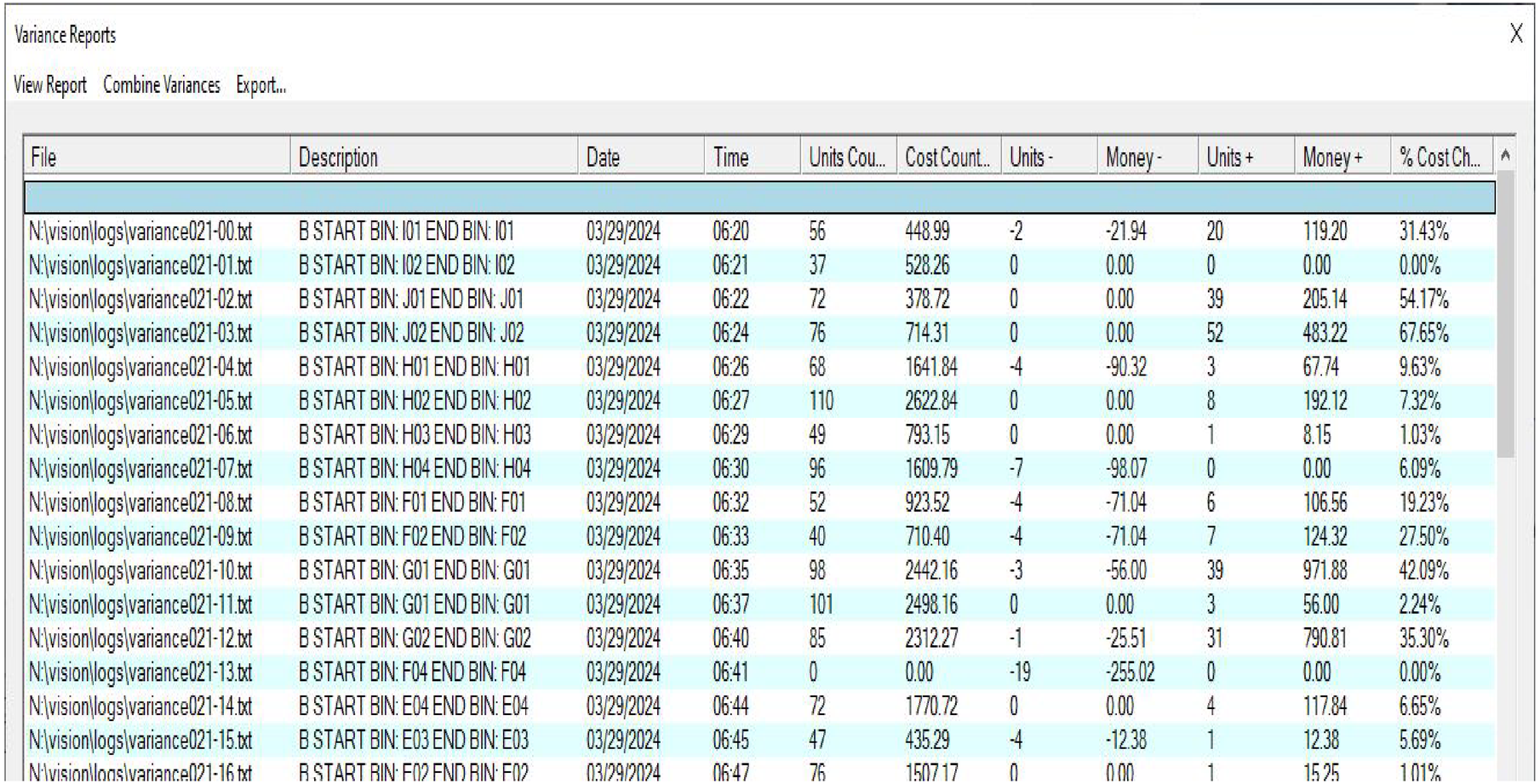
- New feature to help further fine tune usage of the filter lines
  - = - Exact string, eg =P to find only plastic material lens inventory items
    - Former way of using the filter lines would return everything with P in the material code, eg PLY, TPY, etc.
  - ! – Everything except the item specified, eg !P to find everything with the letter P in the material code except for P
  - > and < can be used for field in which the result can be numeric, eg QOH or usage



VARIANCE HISTORY

Frames, Lenses, Miscellaneous

- Collection of past variance reports (30 days)
- Allows labs to avoid printing or manually saving variance reports
- Filter lines allow the user to search for a specific bin, date or variance



File	Description	Date	Time	Units Cou...	Cost Count...	Units -	Money -	Units +	Money +	% Cost Ch...
N:\vision\logs\variance021-00.txt	B START BIN: I01 END BIN: I01	03/29/2024	06:20	56	448.99	-2	-21.94	20	119.20	31.43%
N:\vision\logs\variance021-01.txt	B START BIN: I02 END BIN: I02	03/29/2024	06:21	37	528.26	0	0.00	0	0.00	0.00%
N:\vision\logs\variance021-02.txt	B START BIN: J01 END BIN: J01	03/29/2024	06:22	72	378.72	0	0.00	39	205.14	54.17%
N:\vision\logs\variance021-03.txt	B START BIN: J02 END BIN: J02	03/29/2024	06:24	76	714.31	0	0.00	52	483.22	67.65%
N:\vision\logs\variance021-04.txt	B START BIN: H01 END BIN: H01	03/29/2024	06:26	68	1641.84	-4	-90.32	3	67.74	9.63%
N:\vision\logs\variance021-05.txt	B START BIN: H02 END BIN: H02	03/29/2024	06:27	110	2622.84	0	0.00	8	192.12	7.32%
N:\vision\logs\variance021-06.txt	B START BIN: H03 END BIN: H03	03/29/2024	06:29	49	793.15	0	0.00	1	8.15	1.03%
N:\vision\logs\variance021-07.txt	B START BIN: H04 END BIN: H04	03/29/2024	06:30	96	1609.79	-7	-98.07	0	0.00	6.09%
N:\vision\logs\variance021-08.txt	B START BIN: F01 END BIN: F01	03/29/2024	06:32	52	923.52	-4	-71.04	6	106.56	19.23%
N:\vision\logs\variance021-09.txt	B START BIN: F02 END BIN: F02	03/29/2024	06:33	40	710.40	-4	-71.04	7	124.32	27.50%
N:\vision\logs\variance021-10.txt	B START BIN: G01 END BIN: G01	03/29/2024	06:35	98	2442.16	-3	-56.00	39	971.88	42.09%
N:\vision\logs\variance021-11.txt	B START BIN: G01 END BIN: G01	03/29/2024	06:37	101	2498.16	0	0.00	3	56.00	2.24%
N:\vision\logs\variance021-12.txt	B START BIN: G02 END BIN: G02	03/29/2024	06:40	85	2312.27	-1	-25.51	31	790.81	35.30%
N:\vision\logs\variance021-13.txt	B START BIN: F04 END BIN: F04	03/29/2024	06:41	0	0.00	-19	-255.02	0	0.00	0.00%
N:\vision\logs\variance021-14.txt	B START BIN: E04 END BIN: E04	03/29/2024	06:44	72	1770.72	0	0.00	4	117.84	6.65%
N:\vision\logs\variance021-15.txt	B START BIN: E03 END BIN: E03	03/29/2024	06:45	47	435.29	-4	-12.38	1	12.38	5.69%
N:\vision\logs\variance021-16.txt	B START BIN: F02 END BIN: F02	03/29/2024	06:47	76	1507.17	0	0.00	1	15.25	1.01%

INVENTORY EDITOR

Frames, Lenses

- Unique features:
  - Frames and Lens only
    - Detailed view with usage history and ordering logic
    - Reports (activity log, cost summary, over/understock)
  - Frames only
    - Print inventory labels
  - Lens only
    - “Jump to” lens curve, shape, thickness and picklist information
    - Reports (Unbalanced and uncosted)
      - Unbalanced refers to items without pair quantity where there is a left/right difference

TAKING IN INVENTORY

Lenses, Frames, Miscellaneous

- Purchase Order Receival
- Packing Lists
- Manual Changes
- CSV Update/Import
- ASRS Synchronization

PURCHASE ORDER RECEIVAL

DIGITAL VISION

Lenses, Frames

- Opticom Receival
  - Rewritten for flexibility
  - Order of Operations
    - Exact match of “Reference PO” and item
    - Match merged item by original PO, item (optional)
    - Match item on vendor backorder (optional)
    - Prompt to add unmatched items to a new PO or refuse them
  - Option to receive against POs newer than reference

Opticom Shipment Manifest

Open shipment file...

Current Shipments | Received Shipments | All Shipments

MfgNumber	Vendor	OrderDate	ShipDate	QOrd	QShp	InPOs	InBOs	PO
0087732222	Essilor (Silor/Gentex)		04/26/24	0	19	N	N	ES2404250
0087751760	Essilor (Silor/Gentex)		04/29/24	0	2	N	N	ES2404251
0087717037	Essilor (Silor/Gentex)		04/26/24	0	501	N	N	

PACKING LISTS

Frames, Lenses, Miscellaneous

- Three main types:
  - Take from inventory (write-offs, returns)
  - Add to inventory (imports, cycle counts)
  - No effect on inventory (printouts, organization)
- Now a tab in the PO programs
- Can be created via barcode, manual entry, or CSV
- Feature: receive frame packing list against POs

CSV UPDATE/IMPORT

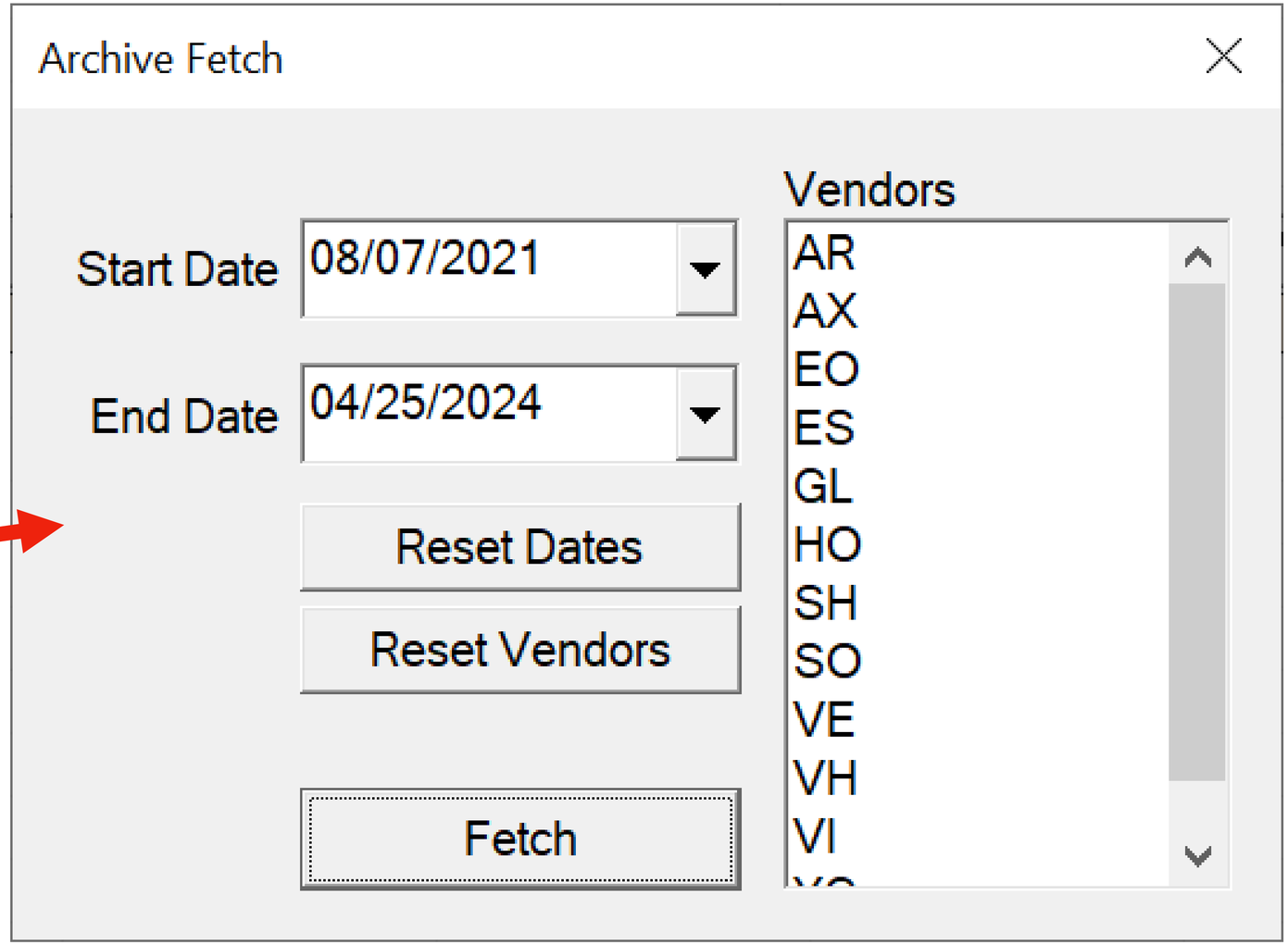
Frames, Lenses, Miscellaneous

- Import (Misc)
  - Mfr, Item, Desc, Bin, QOH, Cost, Price, Status, Division, InvCat
- Update (Lenses, Frames)
  - Barcode based
  - Useful for batch modifications
  - Lenses: Bin, QOH, Order-via, Cost, Price1, Price2, Price3, Lot Size
  - Frames: Bin, QOH, Division, Lot Size

PO FEATURES

Frames, Lenses, Miscellaneous

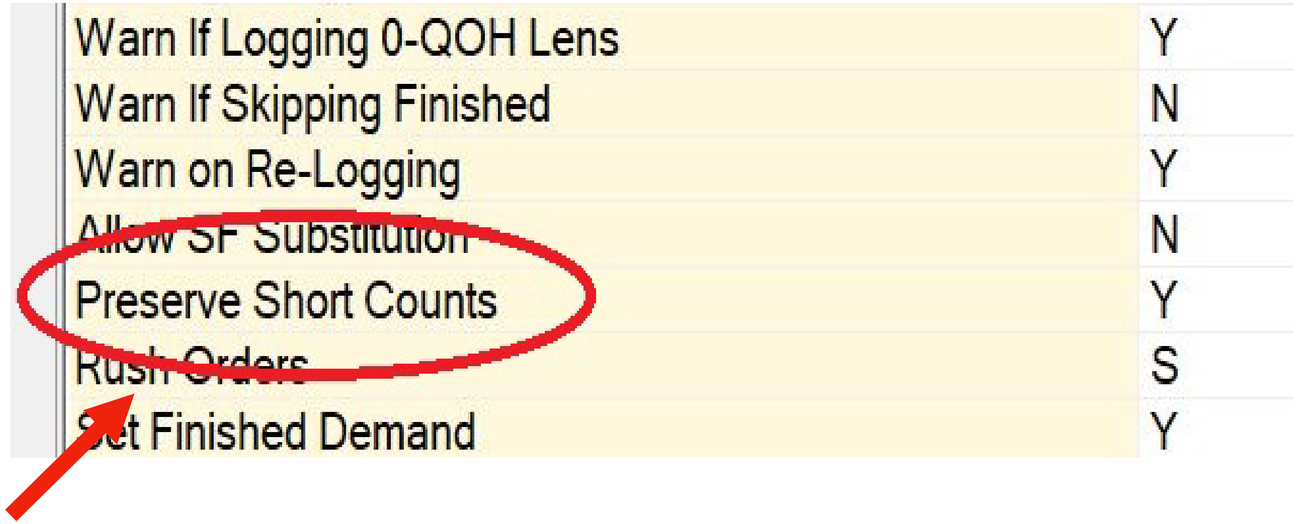
- View “Jobs Waiting for Order”
- Vendor order-audit tool
  - Global Optics lens order only
  - Split out missing items to a new PO
- View deleted POs
- Archive PO fetch dialog
- Report on all items/orders

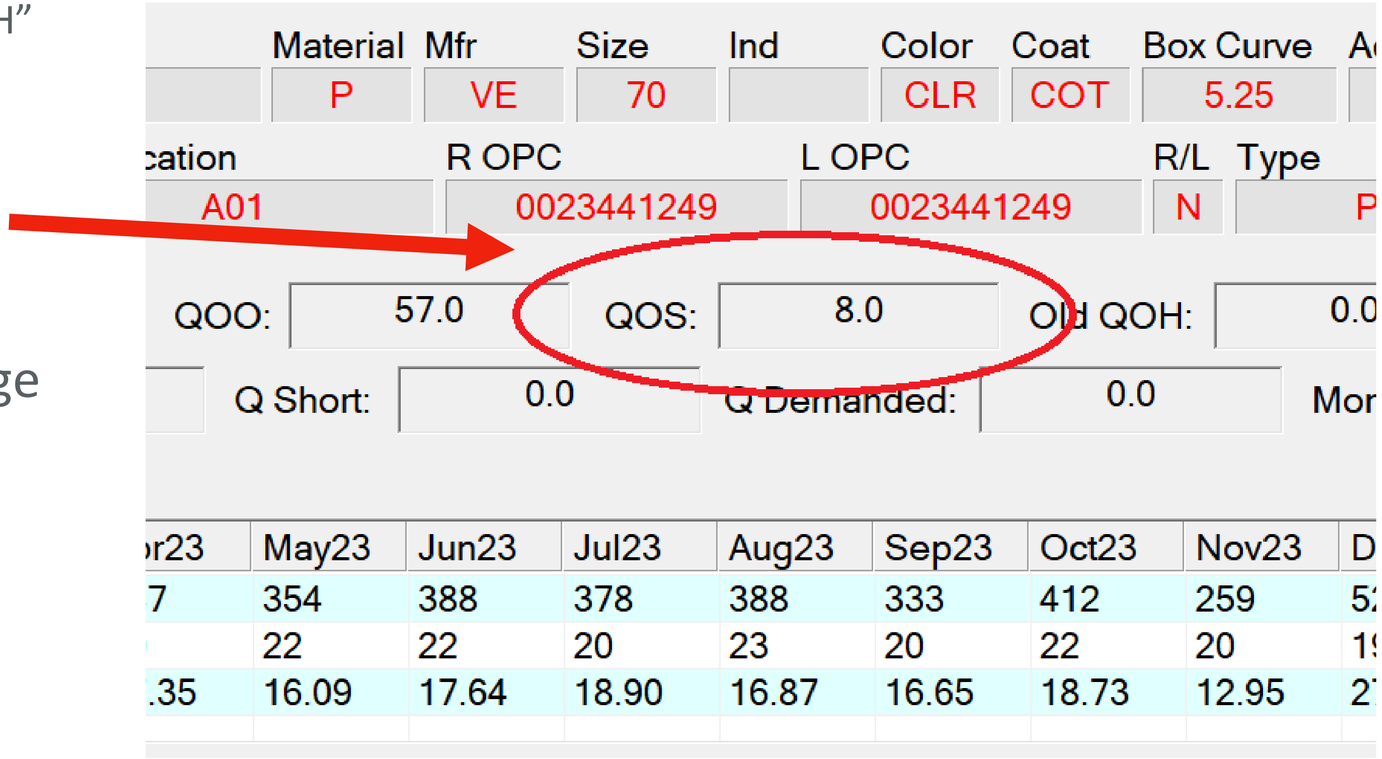


LENS INVENTORY

Developments

- New Option: Preserve Short Counts <4,8,1,1>
  - Handling for extended periods of “Negative QOH”
  - Clear it only at month-end
- New field: Quantity-on-Short-Order
  - Impacts perpetual inventory ordering
- Increased data size for counts and usage
  - Old Limit was 16,000 per OPC





INVENTORY MYSTERIES

Frames, Lenses, Miscellaneous

- Inventory activity log (L & F)
  - ~30 days on hand
  - Store your own at cycling
  - Formatted export
- PO logs
  - Order & Response
  - Shipment & Receiving
  - Item receiving detail
- Inventory net change
- PO Receiving record

ASRS SYNCHRONIZATION

Lenses, Frames

- Barcode based
- ASRS interfaces can export counts
  - Best practice: update daily
- Works like a cycle count:
  - Store Old QOH
  - Update new counts
  - Create Variance
  - Show mismatch items

ASRS INTERFACES

Automated Storage & Retrieval Systems

	Semi-Finish Lenses	Finished Lenses	Frames
Kardex	✓	✓	✓
RAX	✓		
Schneider AWS	✓	✓	✓

ASRS INTERFACES

ASRS Workflow

- RAX
  - Worktickets are printed and trayed up
  - Trays are scanned at machine entry
  - Robot retrieves items and places them in tray, unboxed.
  - Supports OMA/INF communication
  - Lenses automatically logged
- Kardex
  - Jobs are electronically submitted to the machine from the Combobulator
  - Lights direct human picker to correct bin location
  - Lenses/Frames automatically logged
- AWS
  - Jobs are electronically submitted to the machine from the Combobulator
  - Robot retrieves items and places them in tray, unboxed
  - Supports OMA/INF communication
  - Lenses/Frames automatically logged

ASRS INTERFACES

DVI CONFIGURATION

- DVI SETUP [4,8,1,1]
  - F8: Machinery

RAM Address	192.111.0.112
AWS Path	\VISION\LDS\SOM
Kardex Server Path	\\KARDEX\IMPORT\
AWS Mode	B

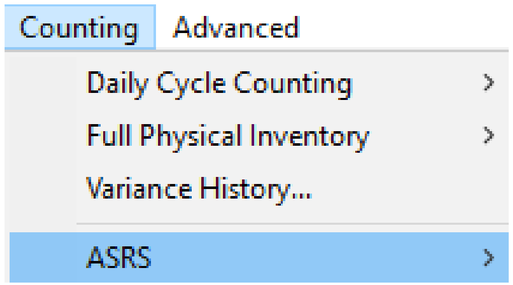
IP address of the RAM server, for RAX interface
Path to shared AWS data space, used to exchange jobs, pick status, and inventory updates
Path to root of shared Kardex data space, used to exchange jobs, pick status, and inventory updates
N=No AWS, L=Lenses only (SF and F), F=Frames only, B=Both lenses (SF and F) and frames,S=SF lenses only,A=SF lenses and frames

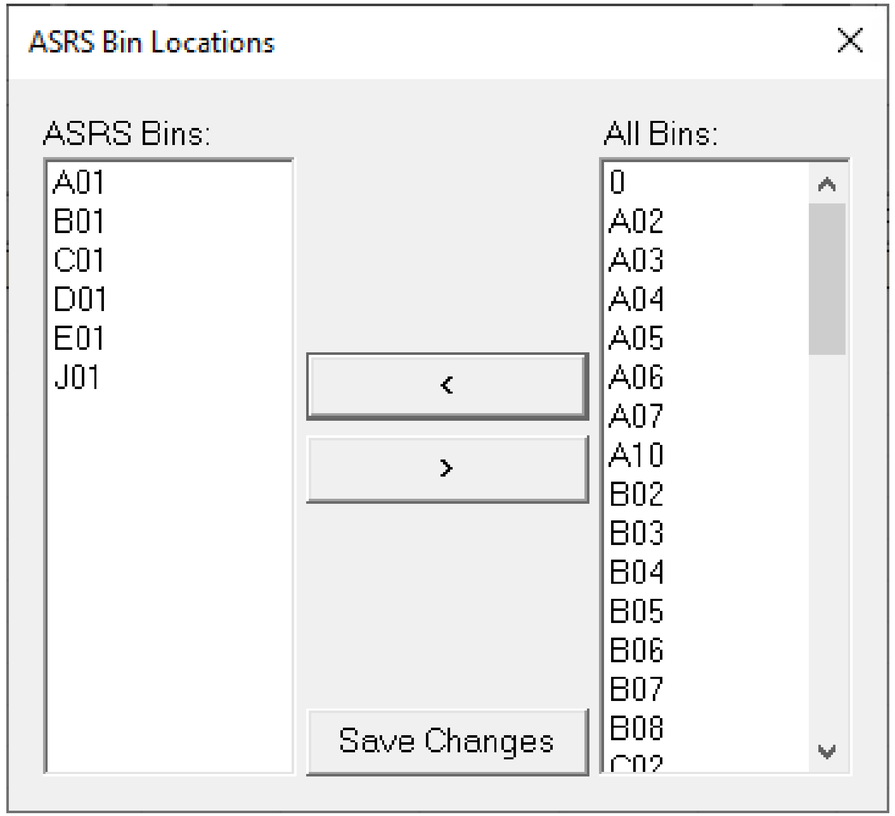
ASRS INTERFACES

ASRS Interfaces

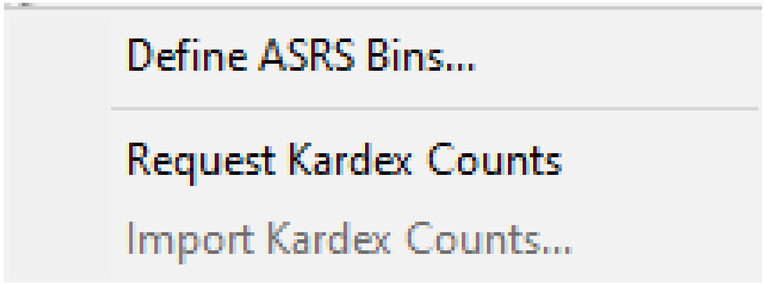
- Defining bin ranges tell the system which lenses are in the ASRS.

  -Define ASRS Bins from the Inventory Editors

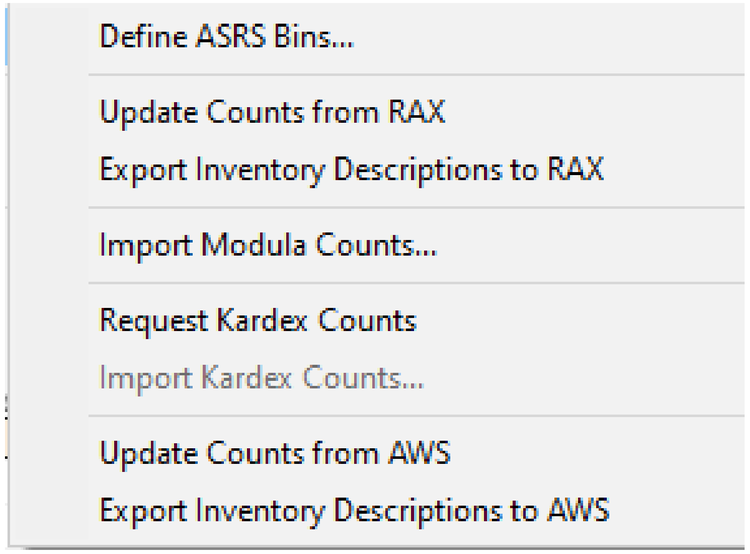




Frame Inventory Editor [3,2,8,7,1]



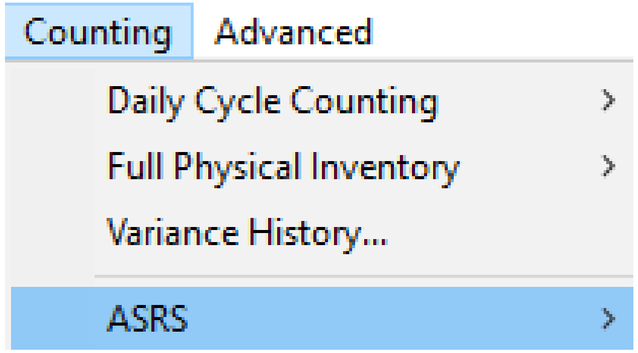
Lens Inventory Editor [3,6,3]



ASRS INTERFACES

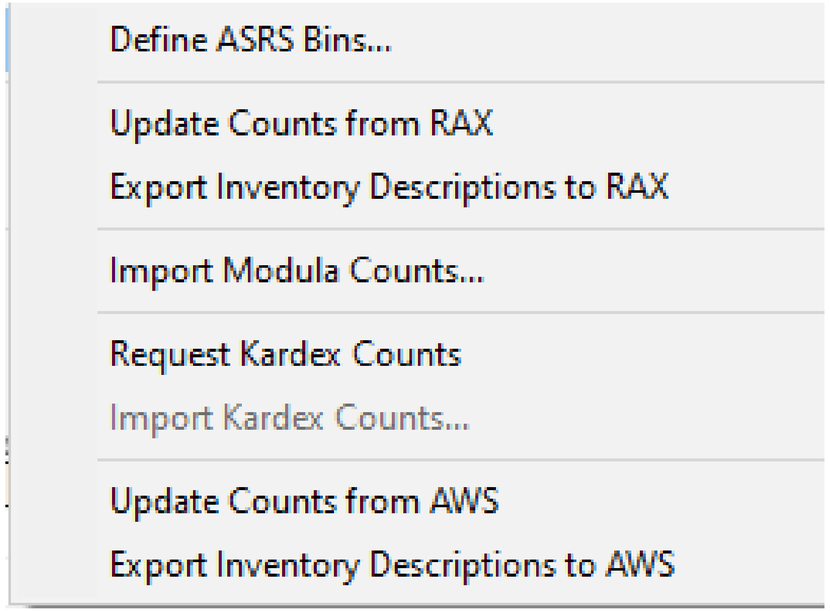
Counting and Export Features [wsr]

- Export Inventory Descriptions for Bins defined as an ASRS



- Update the DVI system with quantity's stored in the ASRS with variance reports

Lens Inventory Editor [3,6,3]



Frame Inventory Editor [3,2,8,7,1]

ASRS INTERFACES

Pass/Fail Statuses

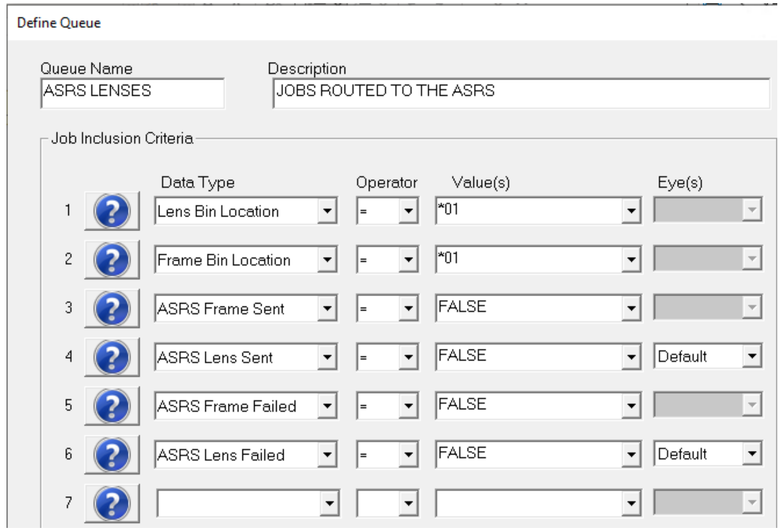
- View ASRS Statuses in Work In Process: [2,1] > F5 Rx Order [wsr]

Job Info	Value
Status	Invoiced
Status	Inspected
ASRS	Right Passed
ASRS	Left Passed
ASRS	Frame Passed
RFID	144599592532 3
Ordered Frame SKU	1312822

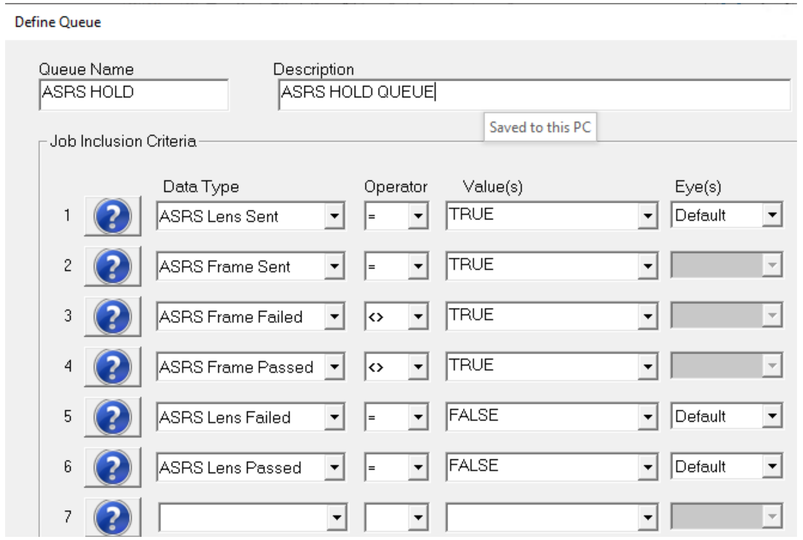
ASRS INTERFACES

Manage your ASRS with the Combobulator

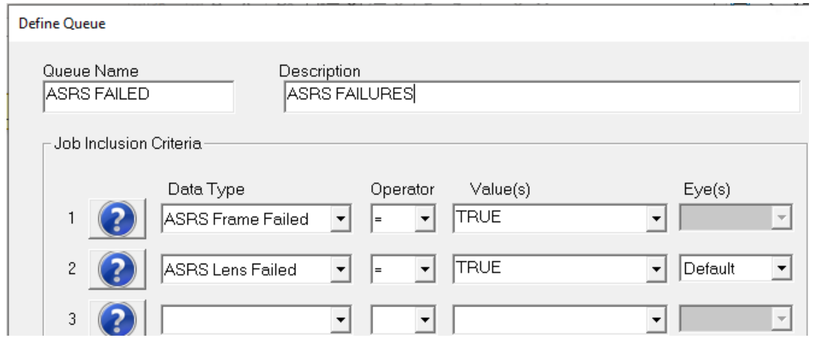
- Capture jobs that need to be routed to the ASRS



- Hold jobs until the ASRS confirms the item is available



- Isolate ASRS failures for operator review

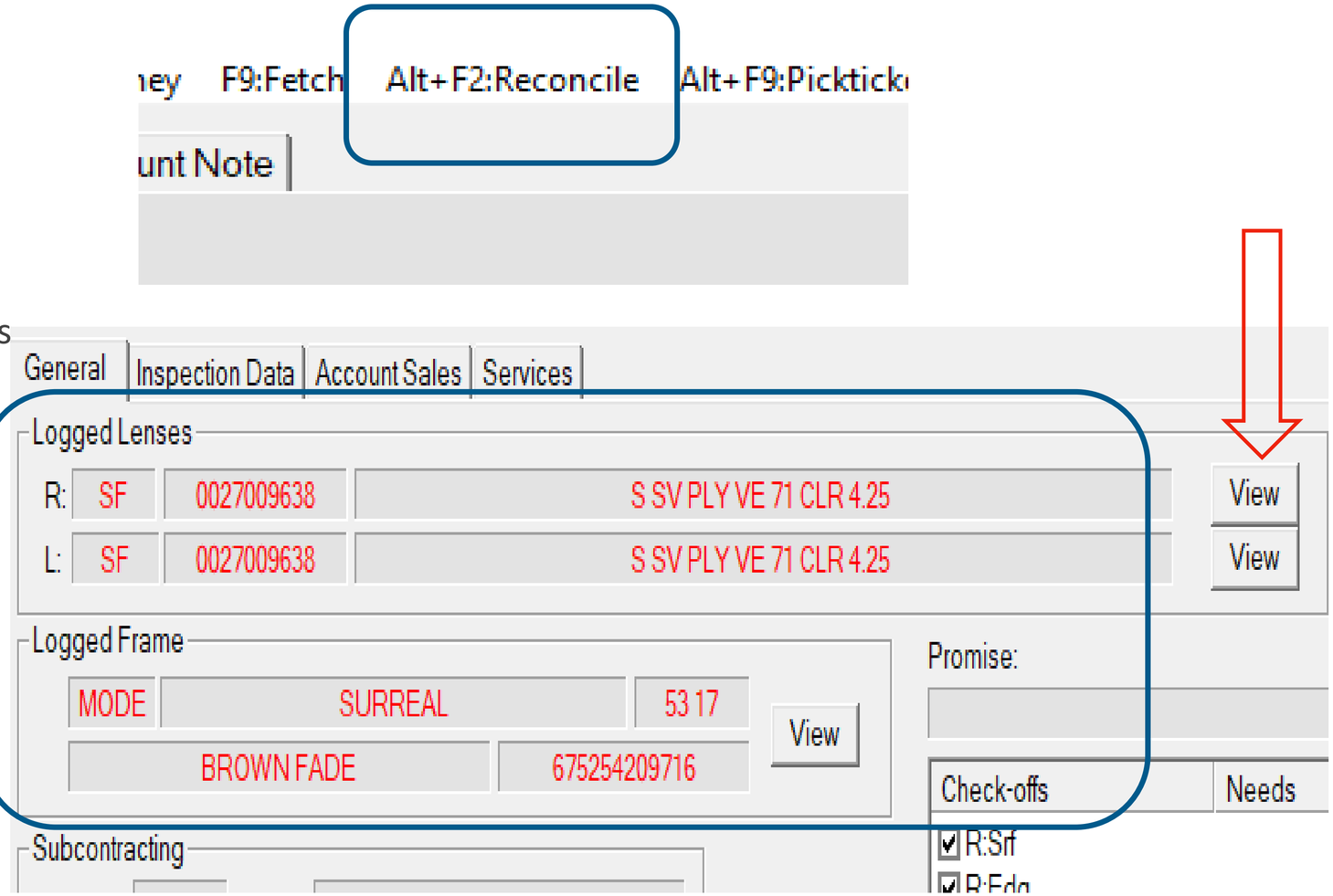


LOGGING / USING ITEMS

When it comes to units leaving the inventory there are several ways that the system can be used.

- ✦ Stock Room Logging – Rx orders for lenses and supplied frames.
- ✦ Packing lists
- ✦ Stock Order Processing
  - This is used for Lenses / Frames and/or Misc items
  - Use the reconciliation feature to ensure that the correct item is being supplied

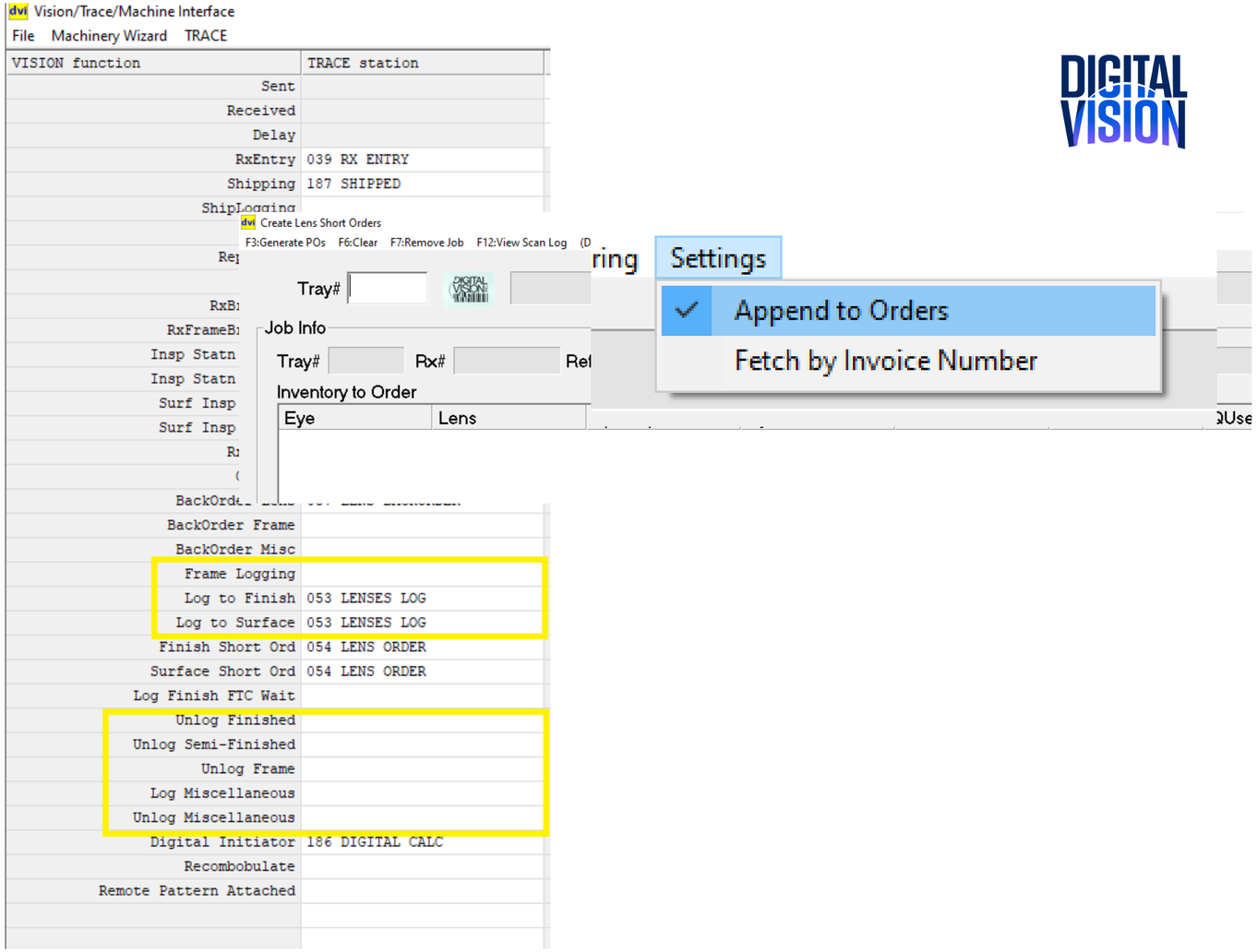
Account Inquiry gives you better visibility of the items that were logged, as well as the ability to jump to the picklist of the item that was logged.

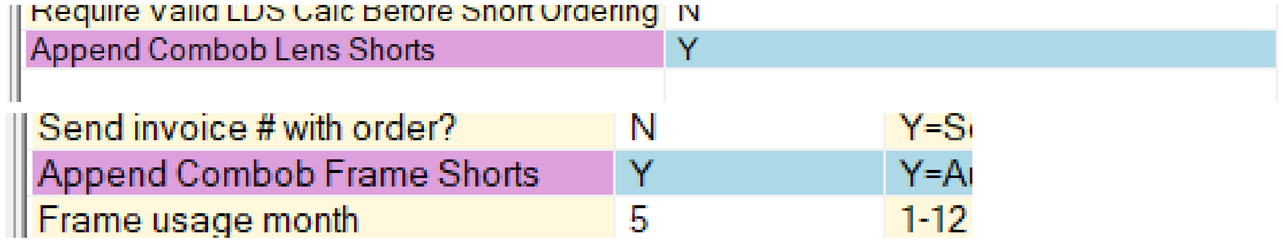


LOGGING / USING ITEMS

Reminders:

- Be sure to create and use TRACE Stations for logging and unlogging of all types.
  - <4,8,7> Station Map
- Lens and Frame short orders from the Combobulator can automatically be appended to any existing Short order that has been created for the same date.
  - Enable in <4,8,1,1>
- You have the ability to disable the question to append short orders to ‘like’ unsent short orders in the lens short order menu. <3,6,4>, **and** frame short order menu <3,2,8,4> Settings, Append To Orders.





LOGGING / USING ITEMS

Picklists and How They Interact With Your Lens Inventory

- Picklist statuses that especially affect lens inventory
  - All of these changes apply **in real time**
    - C – Change with Stocked
      - The next item within 2mm of the size that is Stocked will be re-ordered as a replacement
      - 2mm is the default but this can be adjusted in DVI Setup
      - When QOH reaches 0, the Change with Stocked item will be marked with a N – Non-stocked status and swapped
    - D – Discontinued
      - The next item within 2mm of the size that is Stocked will be re-ordered as a replacement
      - When QOH reaches 0, the Discontinued lens will be marked with a X – Do Not Pick status
- Warn if Logging 0-QOH Lens <4,8,1,1>
  - Option should be set to Y to avoid logging a lens that does not exist in your inventory
    - Can point to receival/cycle counting issues

INVENTORY MANAGEMENT

Transmitting Orders through Opticom

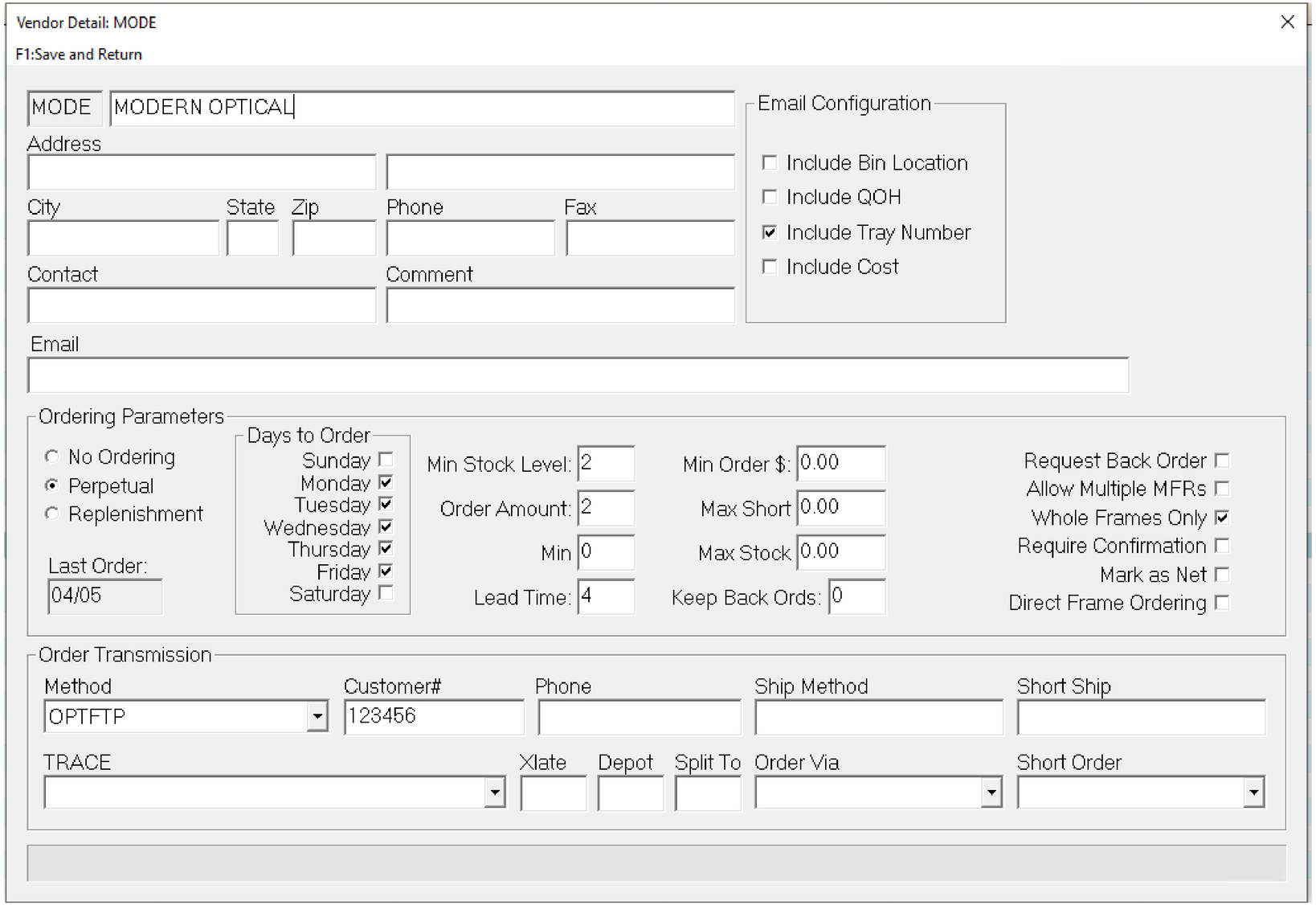
- Get the most out of your Frame UPC database and send purchase orders through Opticom with these manufacturers.
  - ASN receival available with Modern Optical.

- Avalon Eyewear
- Avulux
- Chlogan Eyewear
- Eight to Eighty Eyewear
- HILCO
- Karun US
- LTD Eyewear
- Nouveau Eyewear
- Modern Optical
- R3 Safety
- RLVNT
- Rochester Optical
- SafeVision by Hoya
- Titmus
- Zyloware

INVENTORY MANAGEMENT

Frame Vendor Setup

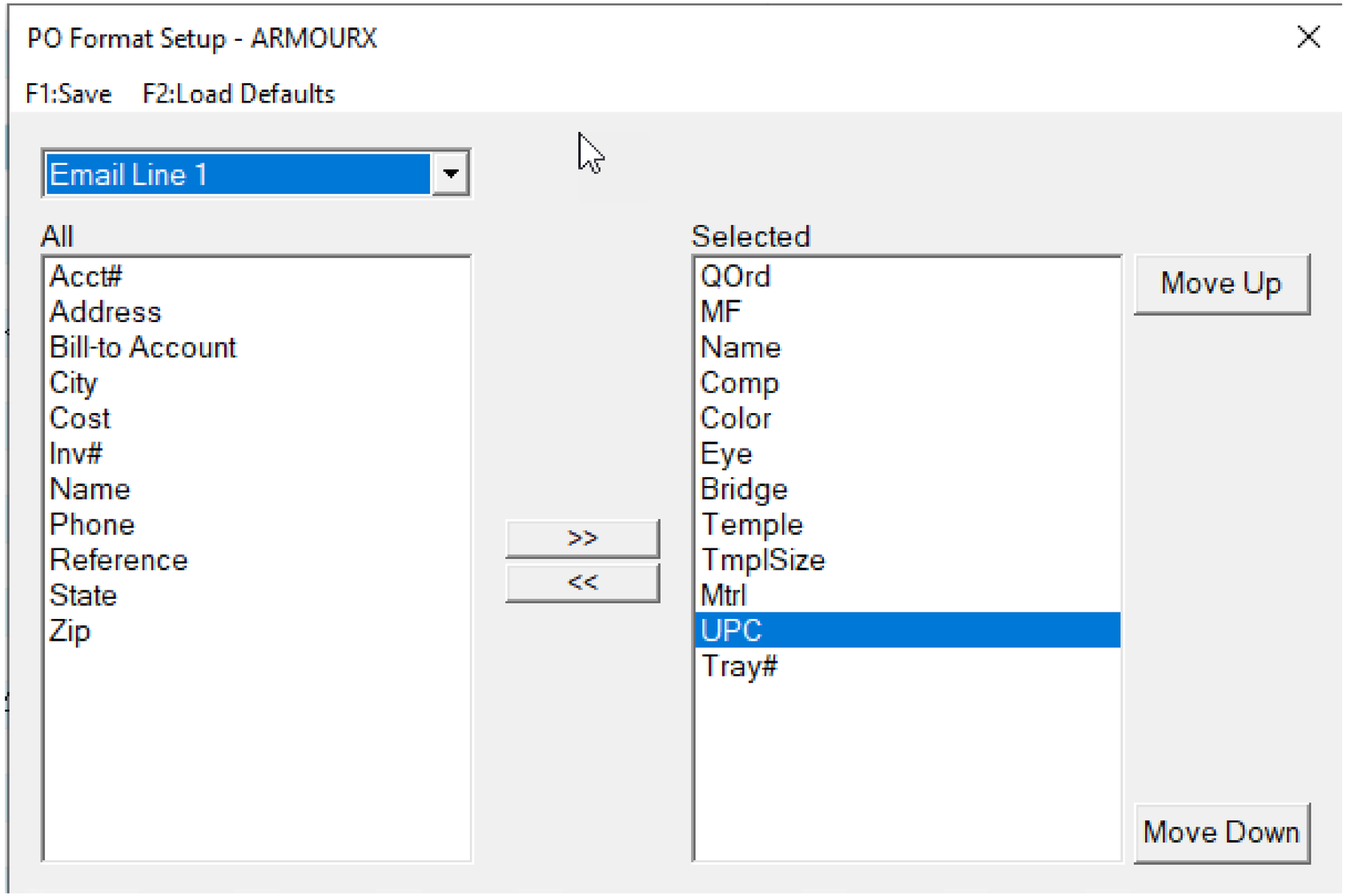
- Select a transmission method for your vendor
- Transmission Options
  - OPTFTP: Use for OPTICOM SFTP ordering.
  - CSVEMAIL: Use to create comma delimited emailed order file.
  - EMAIL: Orders will be emailed to vendor.



INVENTORY MANAGEMENT

Purchase Order Format Setup

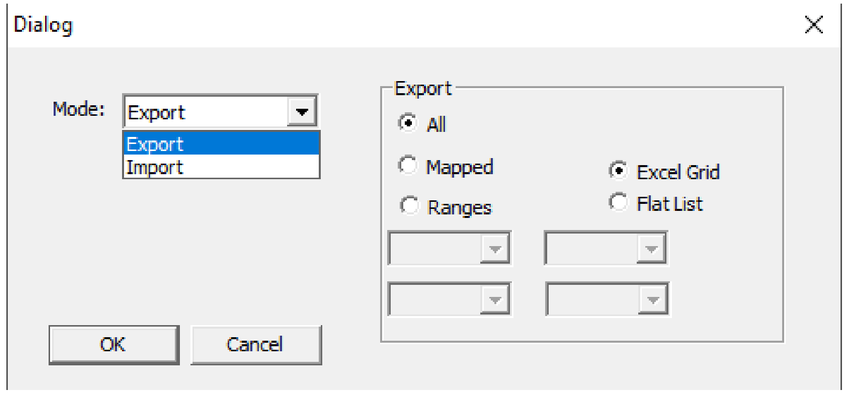
- Customize Email and CSV Email Purchase Orders to meet vendor requirements
  - Frame Manufacturers (3,2,1,4)
  - F9: PO Format…

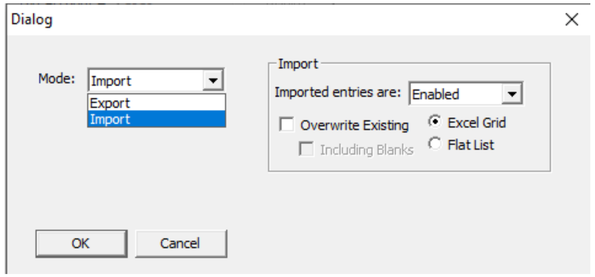


INVENTORY MANAGEMENT

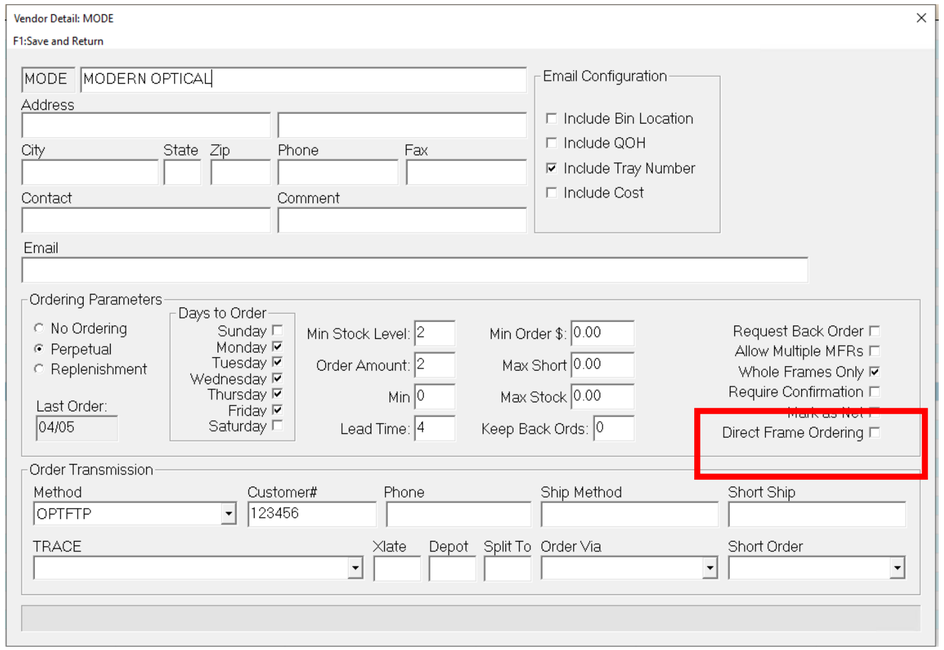
Frame Direct Ordering

- CSV import/export minimizes labor on account setup & maintenance (wsr)
  - Update Accounts (3,4,1,1)
    - Other Commands > Accounts Frame Vendor Mapping





- Set Vendor Profile to 'Frame Direct Ordering if billing is only for lab accounts (wsr)
  - Allows use of 'S' Frame status
- **Coming Soon:** Frame Direct Ordering through Opticom



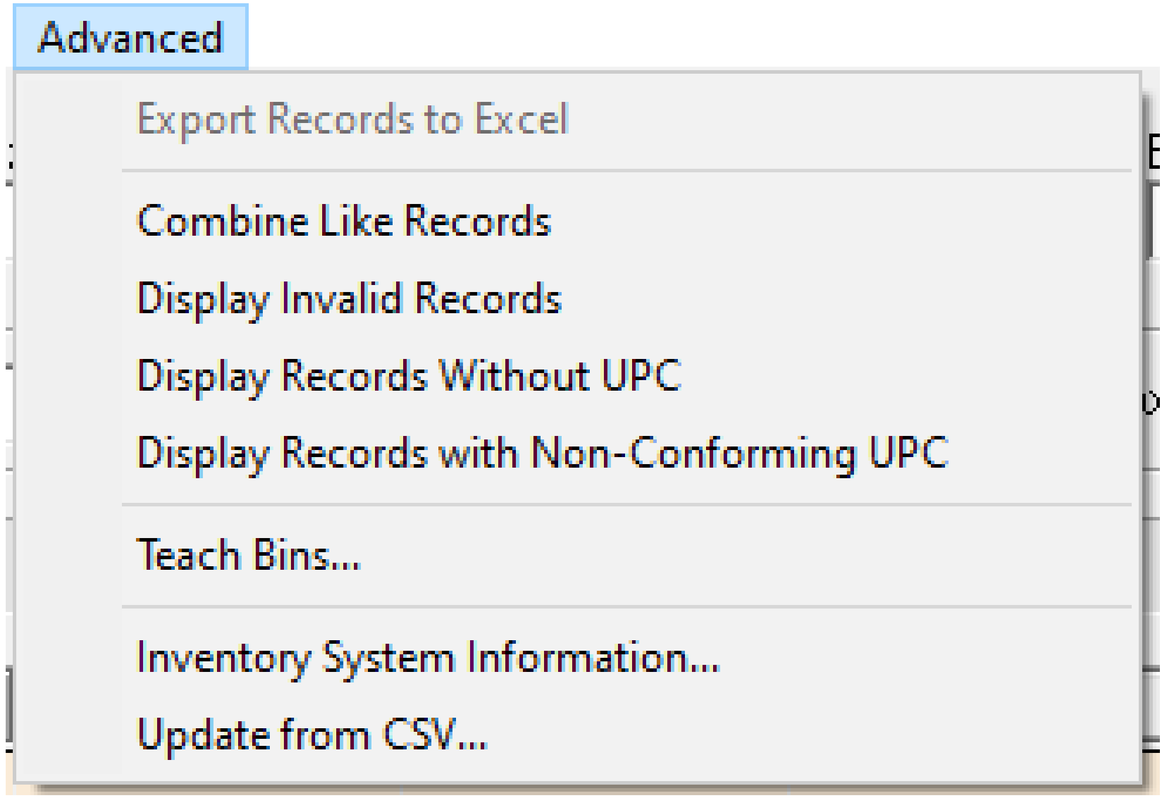
INVENTORY MANAGEMENT

Frame UPC Management

Frame Data Import.

- Import inventory records with a Tracing Points subscription
  - Frame Data [3,2,1,1] > F3: Catalog
    - If you don’t see the inventory you are looking for email Frames@thedvi.com for assistance.

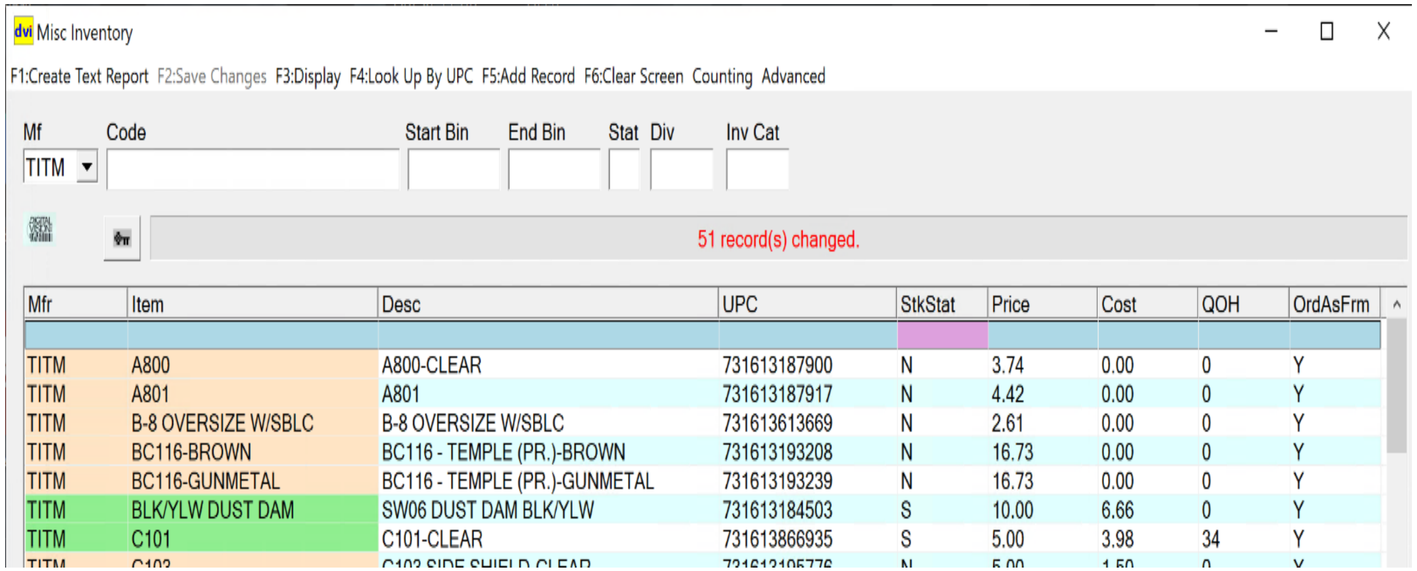
- Valid UPC and EAN barcodes are required for Opticom ordering
- Identify missing or incorrect UPC from the Frame Inventory Editor [3,2,8,7,1] > Advanced
  - Display Records without UPC
  - Display Records with Non-Conforming UPC

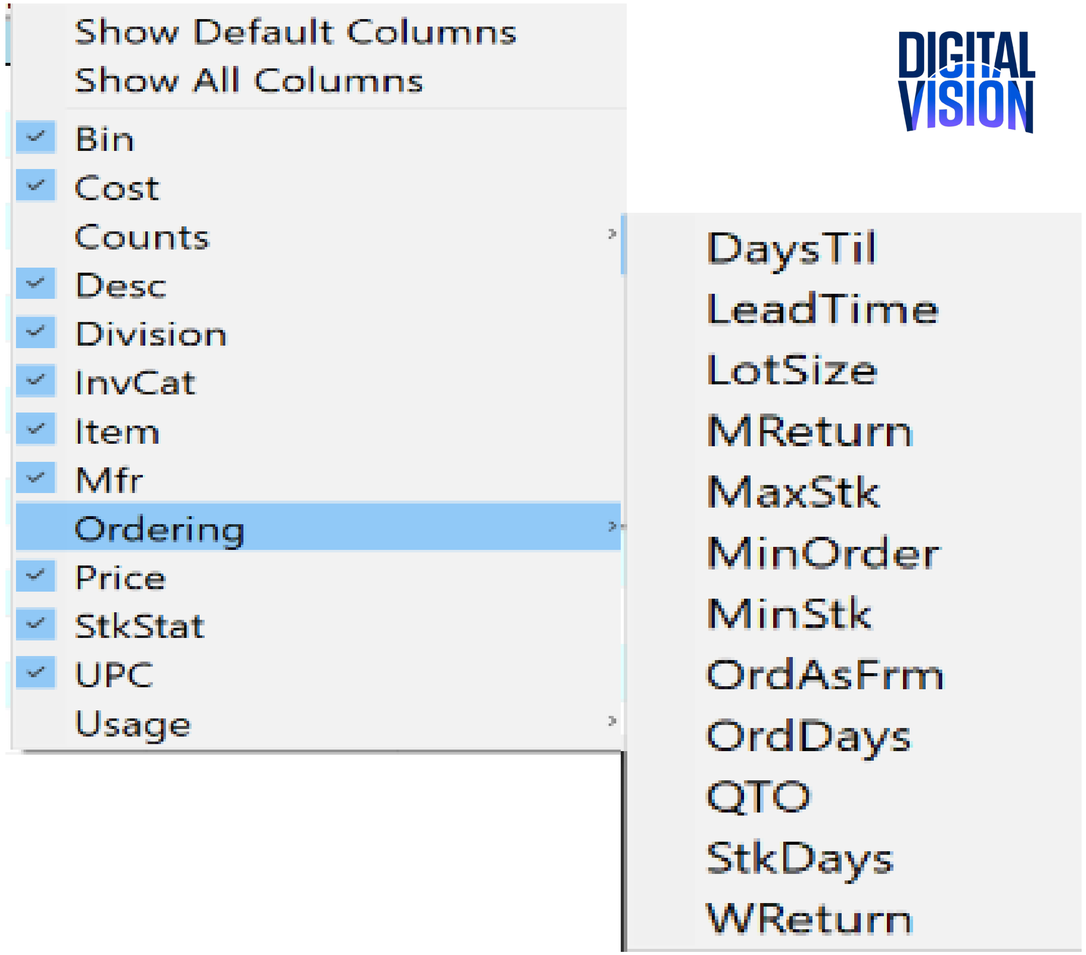


INVENTORY MANAGEMENT

Miscellaneous Inventory

- Mark misc items as ‘OrdAsFrm’ to combine with Frame purchase orders





- Vendor doesn’t need to have frames to generate frame PO’s for misc items.
  - Save on labor going between the two programs.

THANK YOU

Contact Digital Vision:

(503) 231-6606 | info@thedvi.com