

Set up your inventory

Put your shelves into Aminova once: your categories, your suppliers, every item and how many you have. From then on, the counts keep themselves.

Setup guide · For Owners, Managers · aminova.health/university/inventory-setup

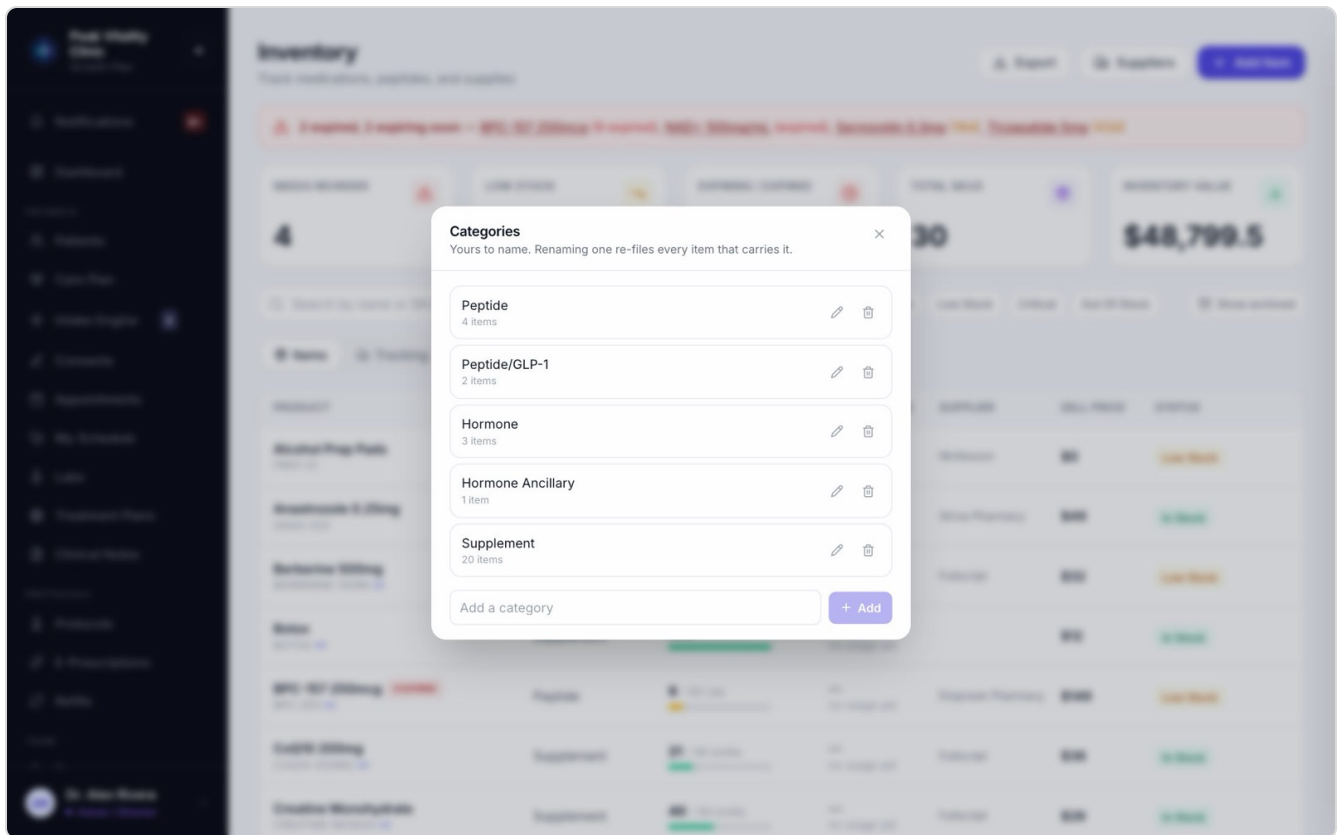
1. WHAT YOU ARE SETTING UP

Inventory keeps one count for each thing on your shelves: vials, pens, supplements, supplies. It warns you when something runs low or is about to expire, and it orders more from your suppliers.

Setting it up means telling it what you stock and how many you have today. Owners, managers and physicians can do this. Anyone else needs **Approve operations queue** switched on for their role in Settings → Roles & Permissions.

2. NAME YOUR CATEGORIES

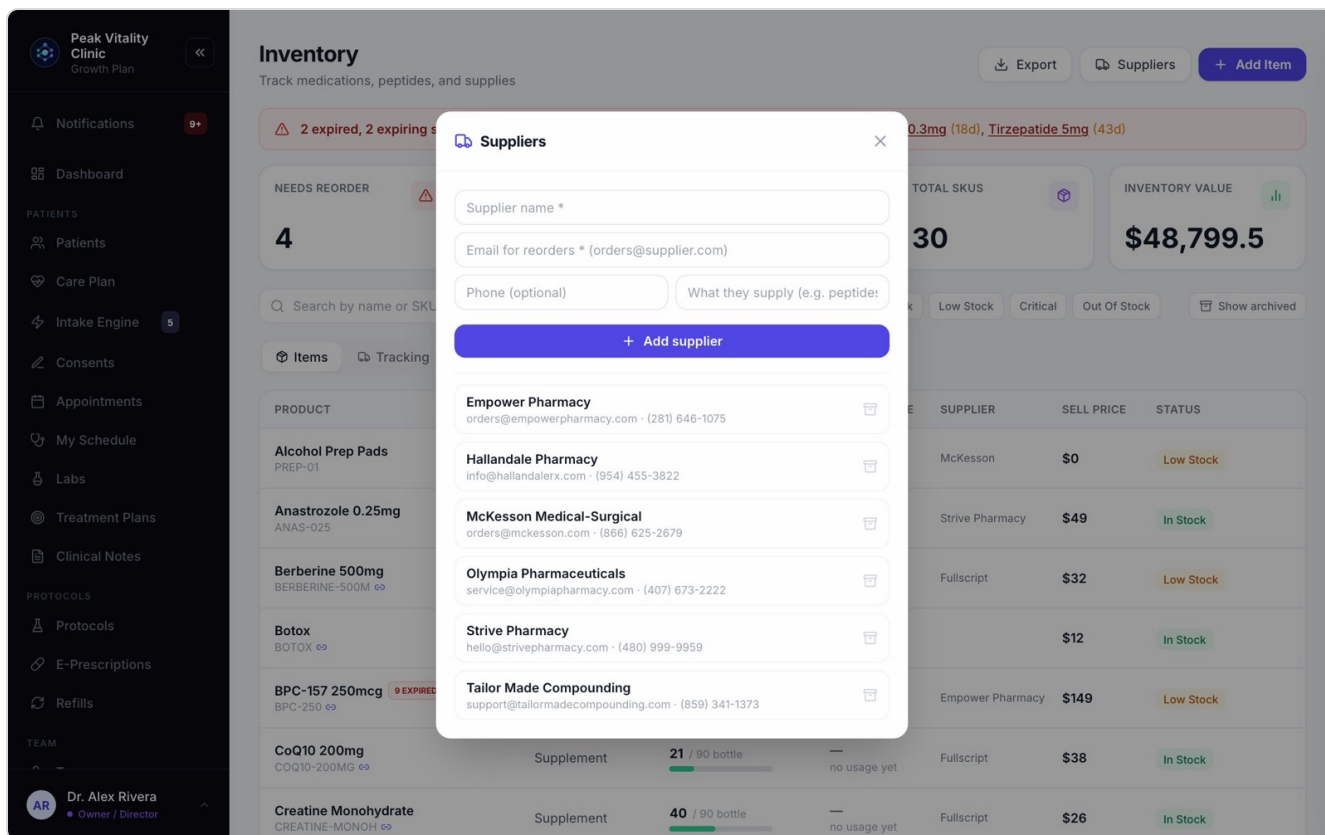
1. Go to **Inventory** in the sidebar.
2. Click **Manage**, beside the category menu.
3. Type a name in **Add a category** and press **Add**. Use the pencil to rename one, or the bin to delete one.
4. Renaming a category moves every item in it along with it.



Categories: yours to name, add and rename.

3. ADD YOUR SUPPLIERS

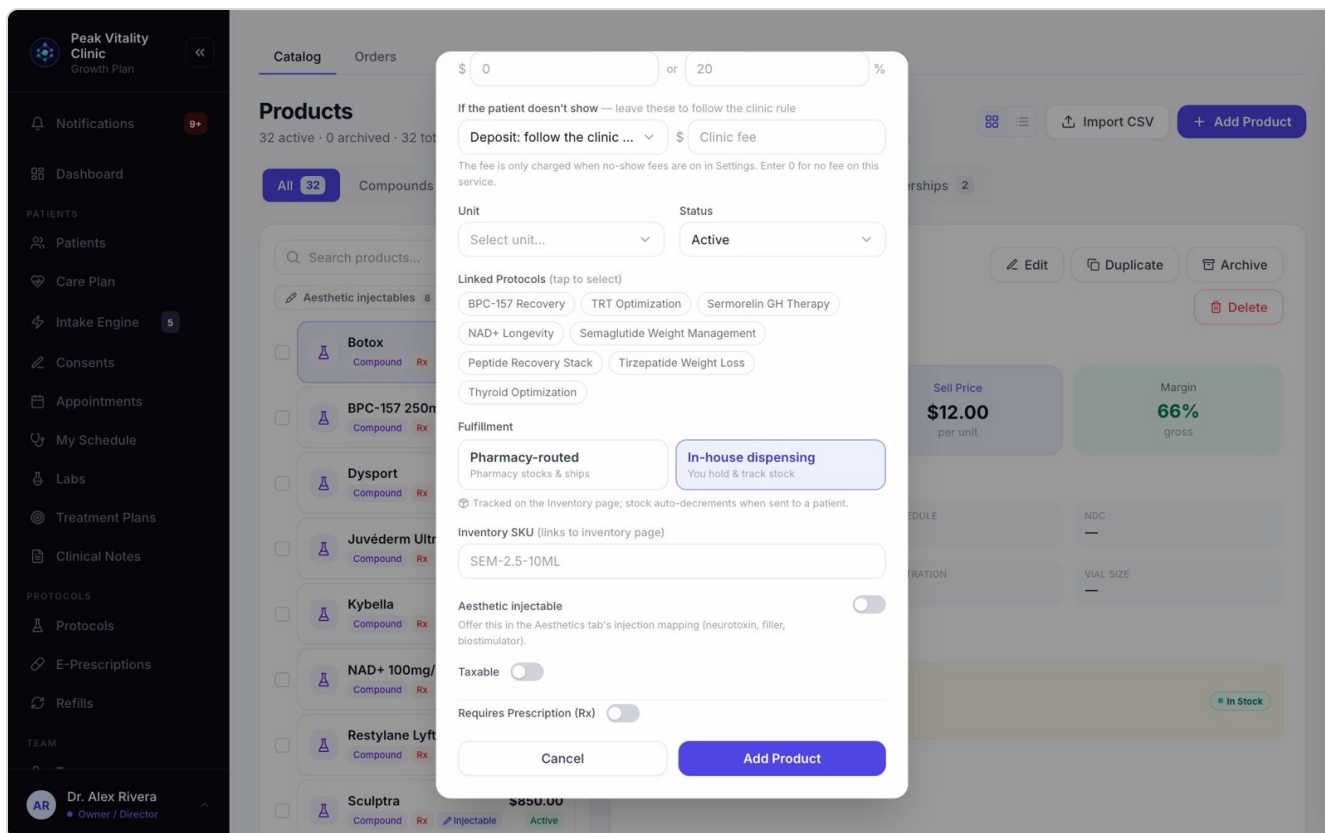
1. Click **Suppliers** at the top of Inventory.
2. Type the **Supplier name** and the **Email for reorders**. Both are needed: a reorder is emailed to that address.
3. Add a phone and what they supply if you like.
4. Press **Add supplier**. Do this for each one.



Suppliers: each one's name and the email reorders go to.

4. STOCK YOUR IN-HOUSE PRODUCTS

1. Most of what you stock is also something you sell. Go to **Products** and open each one you keep on your own shelf.
2. Click **Edit**. Under **Fulfillment**, choose **In-house dispensing**, and pick its **Unit**.
3. Save it. It now has its own row on the Inventory page, linked to the product.
4. Supplements are set to in-house on their own.

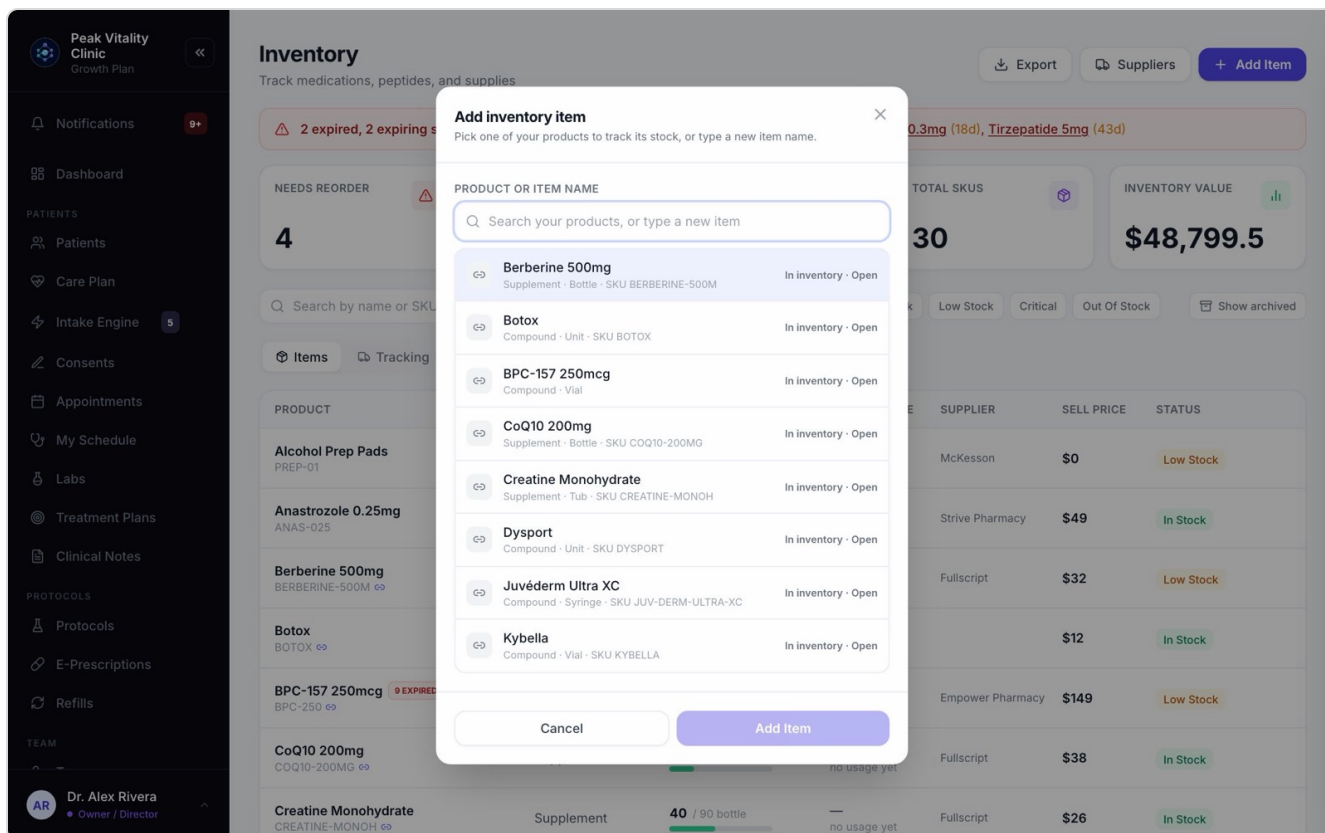


In-house dispensing: you hold the stock, so Inventory tracks it.

Tip. Pharmacy-routed products are not counted. The pharmacy holds that stock, not you.

5. ADD EVERYTHING ELSE

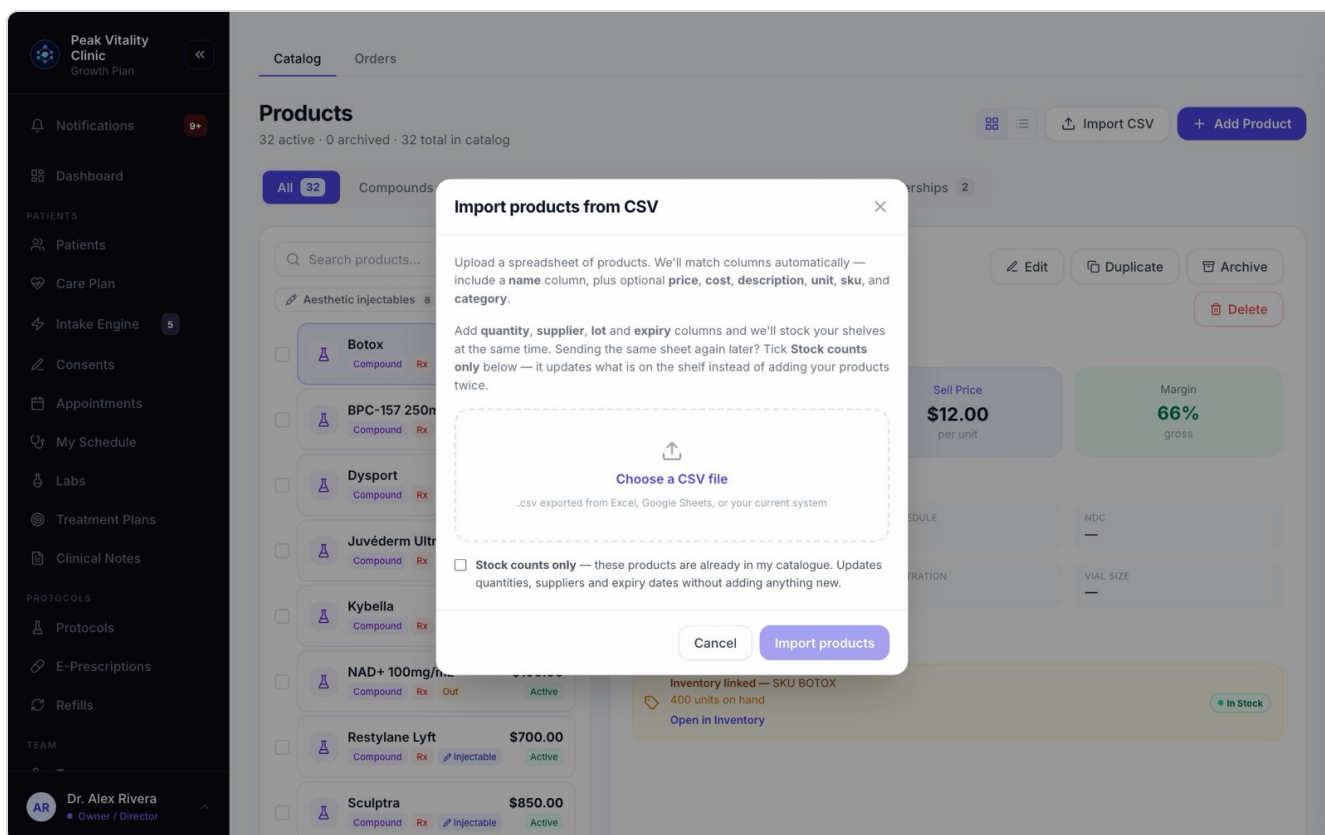
1. On Inventory, click **Add Item**.
2. Start typing. Pick a product to track it, or pick **Create new item** for a supply you don't sell, like gloves.
3. Choose the **Category** and the **Unit**. If yours isn't listed, pick **Custom...** and type it.
4. Type the **Initial Stock**: how many you have right now. Set the **Reorder Point**, the count that means it is time to order more.
5. Press **Add and link** or **Add Item**.



Add Item: pick a product, or type a new item's name.

6. OR BRING IN A WHOLE LIST

1. Have your stock in a spreadsheet already? Go to **Products** and click **Import CSV**.
2. Include a name column, plus quantity, supplier, lot and expiry columns.
3. Press **Choose a CSV file** and check the preview. Importing adds the products and stocks the shelves in one go.
4. Already imported your products? Tick **Stock counts only** so only the counts change.



Import CSV: your products and your stock counts, from one sheet.

7. SET WHEN TO REORDER

1. On Inventory, click an item to open it.
2. Hold your mouse over **Max Stock**, click the pencil, and type the most you like to keep. A reorder then fills you back up to it.
3. Check **Cost / Unit (\$)** and **Sell Price (\$)** the same way.
4. The reorder point you set decides the warnings. At or below it is **Low Stock**. At half of it, **Critical**.

Peak Vitality Clinic
Growth Plan

Inventory
Track medications, peptides, and supplies

Export Suppliers Add Item

2 expired, 2 expiring soon — BPC-157 250mcg (9 expired), NAD+ 100mg/mL (expired), Sermorelin 0.3mg (18d), Tirzepatide 5mg (43d)

NEEDS REORDER 4 LOW STOCK 4 EXPIRING / EXPIRED 4 TOTAL SKUS 30 INVENTORY VALUE \$48,799.5

Search by name or SKU... All Categories Manage All In Stock Low Stock Critical Out Of Stock Show archived

Items Tracking 2

PRODUCT	CATEGORY	STOCK LEVEL	MONTHLY USE	SUPPLIER	SELL PRICE	STATUS
Alcohol Prep Pads PREP-01	Supplement	7 / 80 box	— no usage yet	McKesson	\$0	Low Stock

Alcohol Prep Pads
PREP-01 - Supplement

Not linked to a catalog product. Give a product the SKU PREP-01 to link it.

DEA schedule Not controlled

Current Stock	Max Stock	Container Size	Cost / Unit (\$)	Sell Price (\$)	Item-level Expiry
7 box	80 box	Not set	4	0	May 2028

LOTS / BATCHES (earliest expiry depleted first)

No lots recorded. Lots are created when stock is received.

RECENT MOVEMENT

No recent movement recorded.

Anastrozole 0.25mg

An item, opened: its count, max stock, cost and price.

8. ITEMS YOU DRAW FROM

A 30 mL vial is used a little at a time. Count it in mL, and set its **Container Size**: 30 mL per vial. The count stays in mL, and a delivery can be entered as vials.

Set it in **More details** when you add the item, or in the **Container Size** box on the open item.

9. RECORD THE LOTS YOU HAVE

1. Open an item. Under **Lots / Batches**, click **Add lot**.
2. Type the **Lot number** from the box, how many are in that lot, and the expiry.
3. Press **Save lot**. The count doesn't change. This only labels stock that is already there.
4. Do this for each lot on the shelf. The lot that expires first is then used first, and expiry warnings are right.

10. MARK CONTROLLED SUBSTANCES

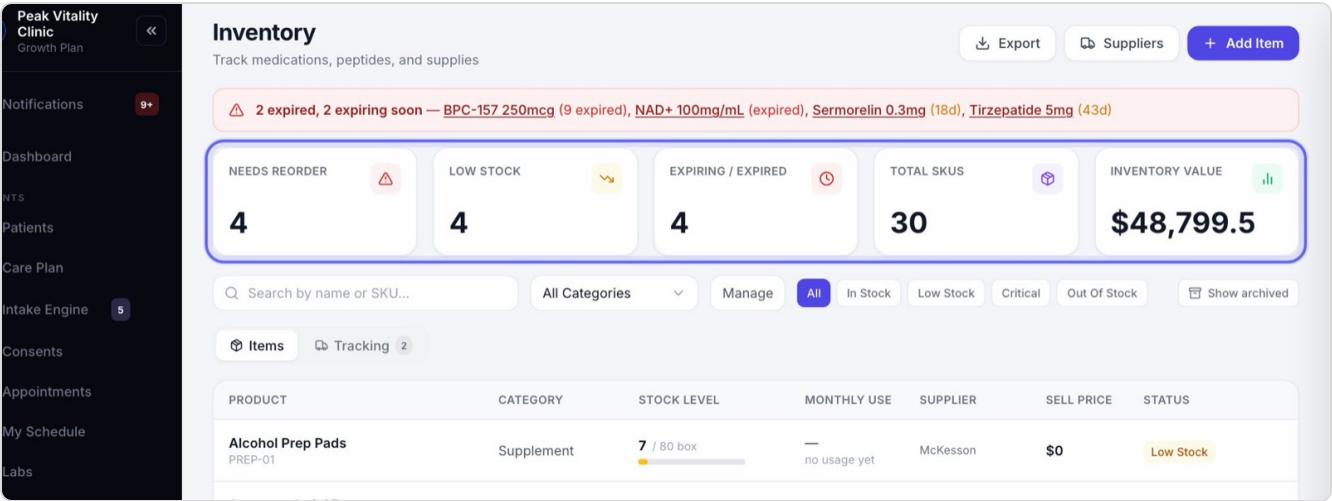
For anything scheduled, set the **DEA Schedule** when you add it, or on the open item. Its opening count is written into its controlled-substance record.

From then on its count can't be typed in. It moves each time it is given, dispensed, wasted or received, and each of those is written into the record.

Tip. Its lots are recorded when you receive a purchase order for it, not with Add lot.

11. CHECK IT'S DONE

- 1. **Total SKUs** at the top should match how many things you stock.
- 2. **Inventory Value** is what your shelves cost you. It should look about right.
- 3. **Needs Reorder** and **Low Stock** show what to order first. Open one and press **Reorder**.



Your numbers at the top of Inventory, once everything is in.

12. FROM HERE ON

You don't count by hand anymore. Stock goes up when you receive an order, and comes down when it is given, dispensed or sent to a patient.

The Inventory and dispensing manual explains each of those.