

Inventory

What is on your shelves, what is running low, and what is on order. Count stock, record lots, reorder from your suppliers and receive deliveries.

Page manual · For Owners, Managers, Providers · aminova.health/university/inventory

1. THE PAGE AT A GLANCE

Inventory is every item your clinic keeps on the shelf and how many are left. Your stock numbers sit across the top. Under them are the search and filters, two tabs, and your stock list.

Three buttons sit in the top right: **Export**, **Suppliers** and **Add Item**. Owners, managers and physicians can add or change stock. Other roles need **Approve operations queue** switched on for them in Settings.

Inventory
Track medications, peptides, and supplies

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
Anastrozole 0.25mg ANAS-025	Hormone Ancillary	40 / 90 bottle	no usage yet	Strive Pharmacy	\$49	In Stock
Berberine 500mg BERBERINE-500M	Supplement	9 / 90 bottle	no usage yet	Fullscript	\$32	Low Stock
Botox BOTOX	Supplement	400 / 100 unit	no usage yet		\$12	In Stock
BPC-157 250mcg BPC-250	Peptide	9 / 60 vial	no usage yet	Empower Pharmacy	\$149	Low Stock
CoQ10 200mg COQ10-200MG	Supplement	21 / 90 bottle	no usage yet	Fullscript	\$38	In Stock
Creatine Monohydrate CREATINE-MONOH	Supplement	40 / 90 bottle	no usage yet	Fullscript	\$26	In Stock

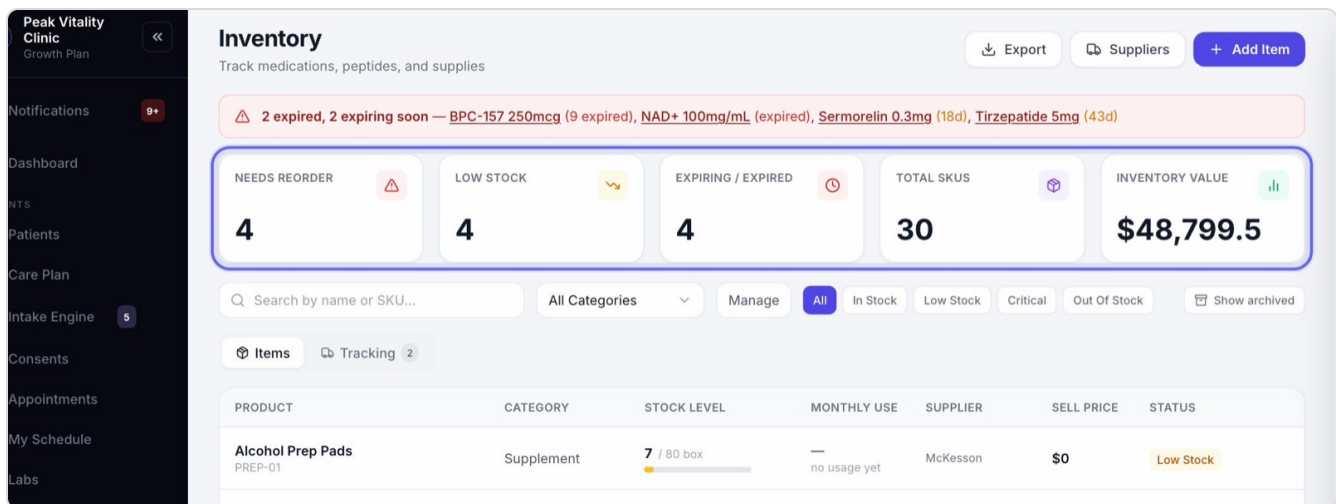
Inventory: the numbers on top, then your stock, one row per item.

2. STOCK AT A GLANCE

1. **Needs Reorder** counts items that are critical or out of stock.
2. **Low Stock** counts items at or below their reorder point.
3. **Expiring Soon** counts items with stock that expires in the next 60 days. When something has already expired, it reads **Expiring / Expired**.

4. **Total SKUs** is how many items you track. **Inventory Value** is what the stock on your shelves cost you.

5. Click **Needs Reorder** or **Low Stock** to show only those items. Click it again to show everything.



The five numbers across the top of Inventory.

3. THE EXPIRY WARNING

When stock is expiring or has expired, a colored bar appears above the numbers. It names each item and how many days it has left. Click a name to jump to that item.

The row itself carries a small tag too, like **exp 21d** or **EXPIRED**.

4. FIND AN ITEM

1. Type a name or SKU in the search box. The SKU is the short code for an item.
2. Use the menu beside it to show one category. **Manage** lets you add, rename or delete your categories.
3. Click **In Stock**, **Low Stock**, **Critical** or **Out of Stock** to show one level. **All** shows everything.
4. Items you archived are hidden. Click **Show archived** to see them again.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

PATIENTS

Patients

Care Plan

Intake Engine 5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

PROTOCOLS

Protocols

E-Prescriptions

Refills

TEAM

Dr. Alex Rivera
Owner / Director

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
Anastrozole 0.25mg ANAS-025	Hormone Ancillary	40 / 90 bottle	no usage yet	Strive Pharmacy	\$49	In Stock
Berberine 500mg BERBERINE-500M	Supplement	9 / 90 bottle	no usage yet	Fullscript	\$32	Low Stock
Botox BOTOX	Supplement	400 / 100 unit	no usage yet		\$12	In Stock
BPC-157 250mcg BPC-250	Peptide	9 / 60 vial	no usage yet	Empower Pharmacy	\$149	Low Stock
CoQ10 200mg COQ10-200MG	Supplement	21 / 90 bottle	no usage yet	Fullscript	\$38	In Stock
Creatine Monohydrate CREATINE-MONOH	Supplement	40 / 90 bottle	no usage yet	Fullscript	\$26	In Stock

Search, the category menu, and the stock level buttons.

Tip. Low means at or below the reorder point. Critical means at or below half of it.

5. YOUR STOCK

- The **Items** tab lists every item, one row each.
- Stock Level** is how many you have. With a max stock set, a bar shows how full the shelf is.
- Monthly Use** is how much you used, and about how many days it will last. It says **no usage yet** until stock starts moving.
- Supplier**, **Sell Price** and **Status** fill the rest of the row.
- A purple **reserved** tag means an approved treatment plan has already promised some of it to a patient. It is still on the shelf.

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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
Anastrozole 0.25mg ANAS-025	Hormone Ancillary	40 / 90 bottle	— no usage yet	Strive Pharmacy	\$49	In Stock
Berberine 500mg BERBERINE-500M	Supplement	9 / 90 bottle	— no usage yet	Fulscript	\$32	Low Stock
Botox BOTOX	Supplement	400 / 100 unit	— no usage yet		\$12	In Stock
BPC-157 250mcg BPC-250 9 EXPIRED	Peptide	9 / 60 vial	— no usage yet	Empower Pharmacy	\$149	Low Stock
CoQ10 200mg COQ10-200MG	Supplement	21 / 90 bottle	— no usage yet	Fulscript	\$38	In Stock
Creatine Monohydrate CREATINE-MONOH	Supplement	40 / 90 bottle	— no usage yet	Fulscript	\$26	In Stock
Dysport DYSPORT	Supplement	900 / 100 unit	— no usage yet		\$4.5	In Stock
HCG 5000IU HCG-5000	Hormone	120 / 100 mL	— no usage yet		\$0	In Stock
Juvéderm Ultra XC JUV-DERM-ULTRA-XC	Supplement	14 / 100 syringe	— no usage yet		\$650	In Stock
Kybella KYBELLA	Supplement	8 / 100 vial	— no usage yet		\$600	In Stock
Magnesium Glycinate 400mg MAGNESIUM-GLYC	Supplement	35 / 90 bottle	— no usage yet	Fulscript	\$28	In Stock
Methylated B-Complex METHYLATED-B-C	Supplement	40 / 90 bottle	— no usage yet	Fulscript	\$30	In Stock

Every item, with its stock level, use and status.

6. OPEN AN ITEM

1. Click a row. It opens right under itself.
2. The top line shows the item's SKU and category, and the product it is linked to. Click the product name to open it on the Products page.
3. Set the **DEA schedule** if it is a controlled substance.
4. The buttons are **Archive**, **Adjust Stock** and **Reorder**. A controlled substance has **Dispense / Waste** in place of Adjust Stock.
5. Below them are its lots, and its recent movement: what came in and what went out.

MONTHLY USE	SUPPLIER	SELL PRICE	STATUS
— no usage yet	McKesson	\$0	Low Stock

Archive

Adjust Stock

Reorder

Cost / Unit (\$)
4

Sell Price (\$)
0

Item-level Expiry
May 2028

Add lot

One item, opened, with its buttons on the right.

7. CHANGE A NUMBER

1. Hold your mouse over a box, like **Max Stock** or **Sell Price (\$)**, and click the pencil.
2. Type the new number. Press Enter to save, or Esc to stop.
3. You can change **Current Stock**, **Max Stock**, **Cost / Unit (\$)** and **Sell Price (\$)**. Items counted in mL or tablets also have **Container Size**, like 30 mL per vial.
4. A controlled substance's count can't be typed. It says **Moves with Dispense / Waste**.

Tip. Leave Max Stock empty if you don't want one. It then reads No max.

8. ADJUST THE COUNT

1. Click **Adjust Stock** on an open item, or the small sliders icon at the end of its row.

2. Pick why it changed: **Received Shipment**, **Waste / Disposal**, **Manual Correction** or **Returned to Supplier**. For a correction, choose + or –.
3. Type the **Quantity**. It shows the new count before you save.
4. For a shipment of vials, pens or mL, the **Lot Number** from the box is required. Add the **Lot Expiry** too.
5. Add a note if you like, then press **Apply Adjustment**.

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NEEDS REORDER 4

Search by name or SKU...

Items Tracking 2

PRODUCT

PRODUCT	USE	SUPPLIER	SELL PRICE	STOCK
Alcohol Prep Pads PREP-01		McKesson	\$0	
Anastrozole 0.25mg ANAS-025		Strive Pharmacy	\$49	
Berberine 500mg BERBERINE-500M		Fullscript	\$32	
Botox BOTOX			\$12	
BPC-157 250mcg 9 EXPIRED BPC-250		Empower Pharmacy	\$149	
CoQ10 200mg COQ10-200MG	Supplement	Fullscript	\$38	21 / 90 bottle
Creatine Monohydrate CREATINE-MONOH	Supplement	Fullscript	\$26	40 / 90 bottle

Adjust Stock Alcohol Prep Pads

ADJUSTMENT TYPE

+ Received Shipment - Waste / Disposal

± Manual Correction - Returned to Supplier

Direction: + - Current: 7 box

QUANTITY (box)

0

LOT NUMBER (optional)

e.g. LOT-240510-A

NOTES (optional)

Reason for adjustment...

Cancel Apply Adjustment

Adjust Stock: pick why the count changed, then how much.

9. LOTS AND EXPIRY

Lots / Batches lists each lot of the item: its number, how many are left, when it expires, and when it came in. The lot that expires first is used first.

Stock you counted in before you tracked lots can be labeled. Click **Add lot**, type the **Lot number**, how many are in it, and the expiry, then press **Save lot**. The count doesn't change.

Tip. A controlled substance's lots are recorded when a purchase order is received, so Add lot is not offered for it.

10. CONTROLLED SUBSTANCES

1. Open the item and click **Dispense / Waste**.
2. Pick the **Action: Dispensed, Wasted, Received or Adjusted**.
3. Type the quantity, and pick the lot. A receipt needs the lot number typed off the vial.
4. **Performed By** is always needed. **Witnessed By** is needed for waste.
5. Press **Record Entry**. It goes on the item's **Controlled-Substance Ledger** with the new balance.

11. REORDER

1. Open the item and click **Reorder**.
2. The **Order Quantity** is filled in for you: enough to reach max stock, or twice the reorder point if no max is set. Change it if you need to.
3. Add a note, then press **Create Order**.
4. If the item's supplier has an email saved, the order is emailed to them.

The screenshot displays the Peak Vitality Clinic inventory management system. A modal window titled 'Create Purchase Order' is open for the item 'Alcohol Prep Pads'. The modal includes a warning: 'This creates an ordered PO. Stock does not change until you mark the PO received.' It shows the current stock as 7 boxes, the supplier as McKesson, and the last ordered quantity as 73. The order quantity is set to 73, with a suggestion to reach the max stock. A notes field contains 'Rush order, special instructions...'. The modal has 'Cancel' and 'Create Order' buttons. The background shows the inventory list with columns for item name, stock, supplier, sell price, and status. The 'Alcohol Prep Pads' item is highlighted, showing a current stock of 7 boxes and a max stock of 80 boxes. The interface also shows a sidebar with navigation options like Notifications, Dashboard, Patients, Care Plan, Intake Engine, Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes, Protocols, E-Prescriptions, Refills, and Team.

Create Purchase Order: how many to order, and a note for the supplier.

Tip. Ordering doesn't change the count. Stock goes up only when you receive the order.

12. PURCHASE ORDERS

1. **Purchase Orders**, under your stock, lists every order with its supplier, items, total and status.
2. To add the supplier's tracking number, pick the carrier, type it, and click **Track**.
3. When the box arrives, click **Receive**. Type the lot number and expiry printed on each carton, then press **Receive**. The stock goes up.
4. **Cancel** cancels an order you no longer need.

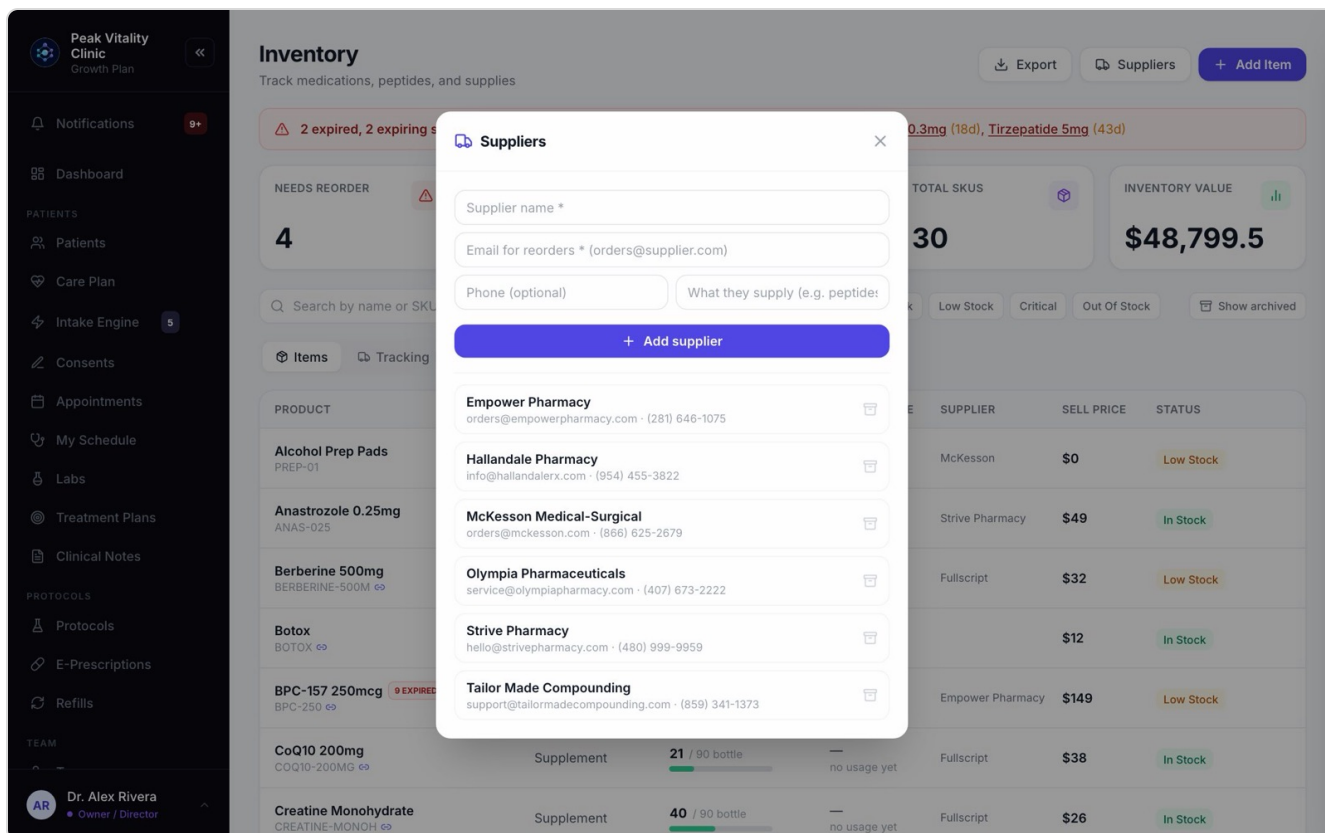
Purchase Orders Stock changes only when a PO is received

PO #	SUPPLIER	ITEMS	TOTAL	STATUS
PO-2026-0043	Olympia Pharmacy	Alcohol Prep Pads xundefi...	\$2,036.00	Draft
PO-2026-0042	Fullscript	Vitamin B12 1mg/mL xundefi...	\$1,468.00	Ordered
PO-2026-0041	Empower Pharmacy	NAD+ 100mg/mL xundefined, Syringes 23G ...	\$2,920.00	Received

Purchase Orders: Track, Receive or Cancel each open order.

13. SUPPLIERS

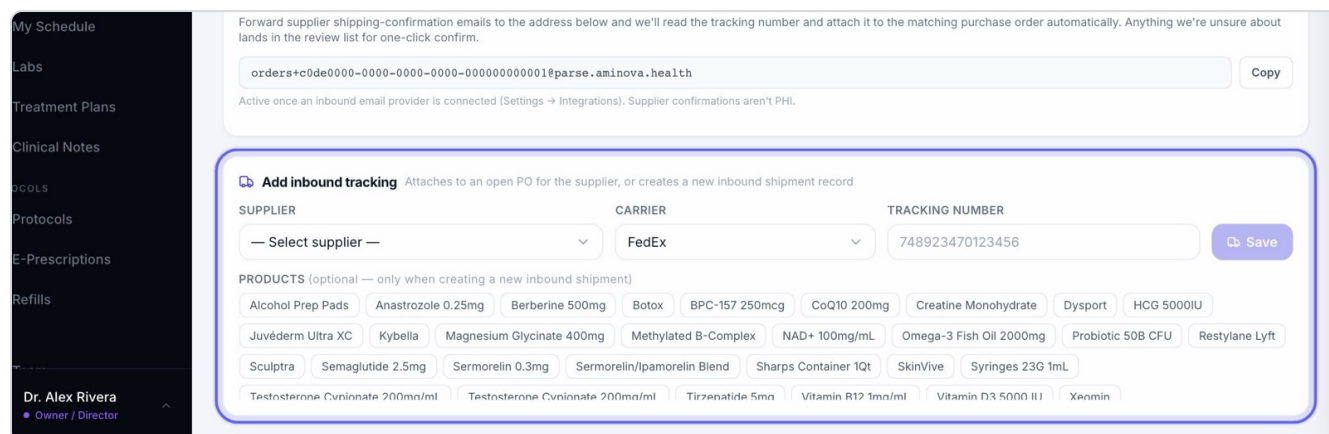
1. Click **Suppliers** at the top.
2. Type the supplier's name and the email reorders should go to. Both are needed. A phone and what they supply are optional.
3. Press **Add supplier**.
4. The box icon beside a supplier archives them.



Suppliers: who you buy from, and where reorders are emailed.

14. TRACK A DELIVERY

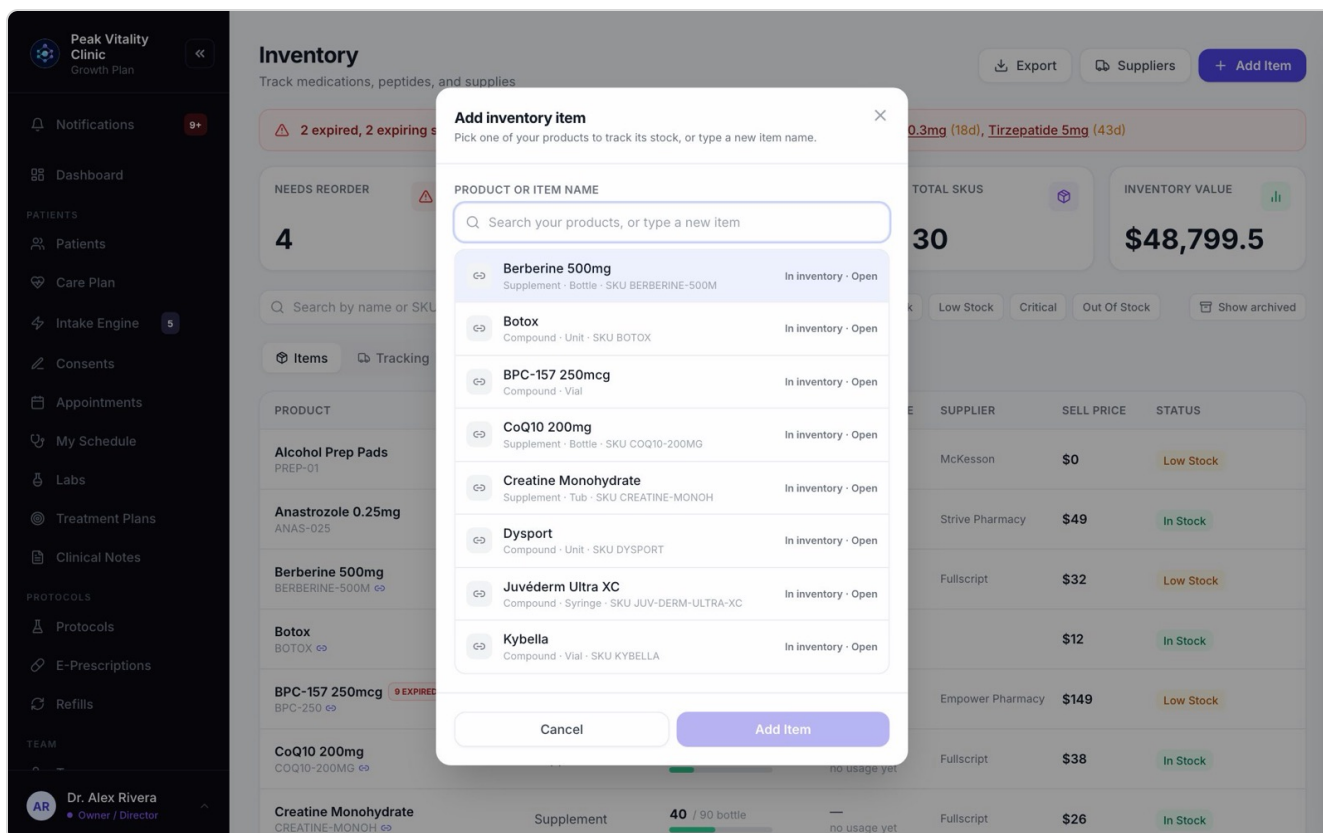
1. Open the **Tracking** tab.
2. Under **Add inbound tracking**, pick the **Supplier** and **Carrier** and type the **Tracking number**. Press **Save**.
3. It is added to that supplier's open order. If there isn't one, a new shipment is made, and you can tick the products in it.
4. **Inbound supplier shipments** lists every order with its tracking. Click a number to follow it on the carrier's site.



Tracking: attach a supplier's tracking number to a delivery.

15. ADD AN ITEM

1. Click **Add Item**.
2. Start typing. Pick one of your products to track its stock, or pick **Create new item** for something that isn't a product.
3. Choose the **Category** and **Unit**, and type the **Initial Stock** and **Reorder Point**.
4. **More details** holds the SKU, supplier, container size, max stock, prices, DEA schedule and expiry.
5. Press **Add and link** for a product, or **Add Item** for a new item.



Add inventory item: pick a product or type a new name.

Tip. A product that is already on the shelf opens its row instead, so nothing is counted twice.

16. EXPORT

Export downloads your whole stock list as a spreadsheet: counts, reorder points, monthly use, status, prices, value, expiry and supplier.