

# Serenity Smile Designs

2020

Inventory Control Assistant Manual



# Inventory Control Assistant

- ✓ An ordering assistant should be organized, efficient, and always looking for ways to save money. They should understand there is a fine line between ordering in large quantities to save money and ordering too much that will sit in the back and expire before getting used.
- ✓ To run an efficient dental practice, we need functioning equipment and adequate supplies. Inventory control is integral to a smooth-functioning dental office. This creates a calm, flowing work environment and eliminates the stress of a missing component.
- ✓ It is important to note that inventory control involves communication between all team members; it's not merely one assistant's responsibility.



# Roles and Responsibilities (1/3)



## Have one person, and only one person, in charge of ordering.

- This person should be organized, efficient, and always looking for ways to save money.
- They should understand there is a fine line between ordering in large quantities to save money and ordering too much that will sit in the back and expire before getting used.



## Utilize Zen Supplies/perform routine inventory checks.

- Zen Process web-based platform manages inventory and ordering of dental supplies. Everything is in one place; a single point of reference for inventory control, ordering, and budgeting.
- Utilize the documentation system located on the supplies door, in which employees write the name of the product when it's getting low, indicating that it is time to reorder.
- Establishing a routine of inventory control allows it to be reviewed periodically during the month.



## Keep the rooms stocked and supplies organized.

- There should be some organization to the supply area in each room. Have the entire inventory labeled and documented. This makes it easy for anyone to know what goes where when they are putting away supplies or looking for something specific.
- Also, keeping the rooms fully stocked will aid staff in knowing how much product is in the back, so that it becomes clear when it is time to order again.



# Roles and Responsibilities (2/3)



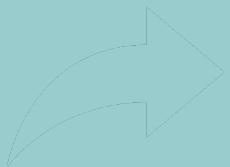
## Save money by planning ahead.

- Don't wait until the last minute to reorder supplies that are low. Most suppliers will offer free delivery or a lower bulk cost if you order with no rush or at high quantities. On the other hand, having to pay a rush delivery to get supplies in time for a scheduled procedure is obviously not a cost-saving approach. By planning ahead for upcoming procedures and ordering in plenty of time, you will save money in shipping and rush fees.



## It pays to be loyal.

- Building a relationship with a dental supply company and giving them a significant amount of business will allow them to help you out when you need it in many ways.
- When your office orders enough with one company, they will make sure to work with you a little more to get you specials on price, help you with a loaner when a piece of equipment goes down, and many other things.

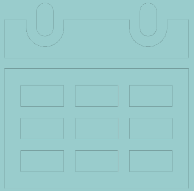


## Go directly to the manufacturer.

- Sometimes the manufacturer of the actual supply can get you a better deal or offer than if you work with a dental supply distributor.
- Get in contact—and stay in contact—with all the representatives of the manufacturers used by your office so you can work with them directly when it makes sense.



# Roles and Responsibilities (3/3)



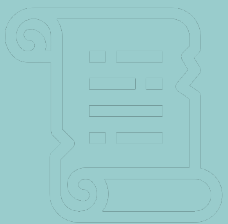
## Know which times are the best time to buy.

- There are certain times of year when companies run the best specials or deals. Knowing these times and holding your purchases until then will allow you to take advantage of those extra savings.
- This is also a good time to plan for the future by purchasing a little extra, if it makes sense, to hold you over until the next time this deal is offered.



## Watch supply spending, but not so much that it's a detriment to your office.

- A good inventory control assistant always should watch spending with dental supplies. However, don't spend a lot of time trying to save a few cents on gloves, when instead you could be spending time with the patients in the office.



## Check for expired products.

- Another reason for inventory assessment is to check for expired products. As we assume dental supply companies will send us the freshest product available, we may have a short time usage for particular products.
- It's best to clean out supplies not used in a timely manner.

# Zen Supplies (1/2)

## Zen Supplies



Zen Supplies is a web-based platform which manages inventory and ordering of dental supplies. They combine the advantage of having everything in one place and having a single point of reference for inventory control, ordering, and budgeting.

## Create an account and link your suppliers



Zen is connected to our dental license, address, team members and our current distributors. Zen will verify each individual distributor and will alert us of any red flags. When distributors are verified you can start placing orders.

## Review your custom Inventory list



Zen will create your custom Inventory List, so all you have left is organize the products into compartments and add min/max QTYS

# Zen Supplies (2/2)

## Process Orders with Confidence



Zen allows you to review your entire order to make sure it's within the budget and products are price-competitive. Select other vendors based on shipping time and reviews from other Zen members. When you are ready simply select "Proceed to Checkout" and all orders are processed by Zen.

## Track and Verify Orders as the shipments arrive



Use Zen to track your order's status, verify as shipments arrive and manage any backorder items. If you need to return an item, select an item and we will process return label for you.

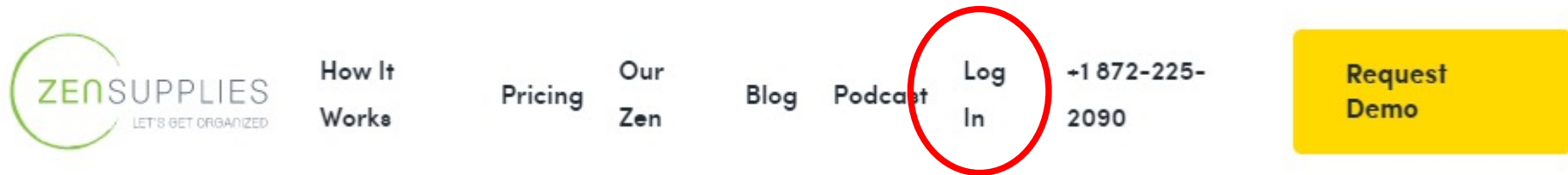
## Control Budget with personalized attention



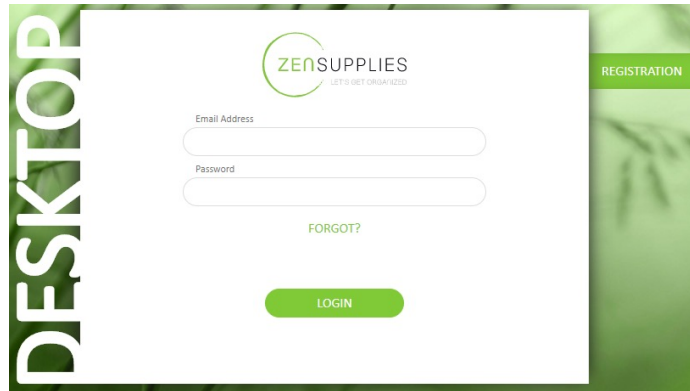
Our team will provide personalized monthly reports on spending habit and help guide your team on areas for improvement.

# Logging onto Zen Supplies

1. Open Google Chrome and type ZenSupplies.com into the address bar.
2. The home screen appears.
3. Click “Log In.”



4. Zen’s log in screen appears.



5. Type in our email and password and click **Login**.





# Login Information for Zen Supplies

Login:  
madisonantonelli@gmail.com



Password:  
Taylor189\*

# Dashboard

1

Review your custom inventory. Manage QTYS and access MSDS. Remember if you can't find a product in inventory - add from **Dental catalogs**

If all your quantities are accurate use **Restock Inventory** to place order

If you would like to create an order "Amazon" style by selecting products into your shopping cart - use **Quick order**

To take **Full Advantage** of Zen Team - Verify ALL orders

ZEN

- Dental Catalogs
- My Inventory
- Restock Inventory
- Quick Order
- Orders
- Reports

Always keep an eye of the **remaining budget**

All orders **combined here** for approval:  
- Restock inventory  
- Quick order  
- Office supplies

Access your **personal settings**:  
- E-mail  
- Password

Access the **practice settings**:  
- Budget settings  
- Users  
- Credit card  
- Distributors

5 latest orders - to access all recent orders select **More** or click **Orders** in the left side menu

If you purchased products directly from a supplier do not worry about your budget - use **Out of ZEN** to track these orders

ZEN

ZEN OUT

Budget: \$3,040.62

Start typing product name, order or product number

0 ORDERS FOR APPROVAL	\$4,915 SPENT THIS MONTH	+ CREATE ORDER	CATALOGS	BUDGET SETTINGS
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LATEST ORDERS

No latest orders yet.





OUT OF ZEN

No out of zen orders yet

**ZEN** DEMO DENTAL  
Budget remaining: \$3,200.00

**INVENTORY LIST (14)** ADD/EDIT Filter/Sort

**ALL** DISPOSABLES DR. AWESOME PRODUCTS DR. NOT SO AWESOME STORAGE HALLWAY STORAGE HYGIENE  
MOST USED PRODUCTS ORTHO TREATMENT +

IMAGE	NAME	DISTRIBUTOR	STORAGE
<input type="checkbox"/>	 #0.016 Royal H.A Ultra Thermal Wire Upper Pack of 100 <small>By ORTHODENTALS</small> #0.016 Royal H.A Ultra Thermal Wire Upper Pack of 100	Benco Dental	1 storage
	<b>RETAIL PRICE</b> \$88.79 <b>ESTIMATED CLIENT PRICE</b> \$80.00	<b>LOCK PRODUCT</b> <input type="checkbox"/> <b>SEND OUT QTY</b> <input type="checkbox"/>	
<input type="checkbox"/>	 #1 Chrometal Polish Black <small>By Yoon Medical</small> Chrometal burnishing agent #1 is used to pre-buff chromium and other precious restals. Removes scratches Produces a smooth finish	Benco Dental	2 storages
	<b>RETAIL PRICE</b> \$21.49 <b>ESTIMATED CLIENT PRICE</b> \$20.00	<b>LOCK PRODUCT</b> <input type="checkbox"/> <b>SEND OUT QTY</b> <input type="checkbox"/>	
<input type="checkbox"/>	 #1 Kingsley Type Scrapers Carbon Steel <small>By Great Lakes Orthodontics</small> For fine scraping study models, removing small bubbles, and detailed shaping.	Benco Dental	2 storages
	<b>RETAIL PRICE</b> \$13.39 <b>ESTIMATED CLIENT PRICE</b> \$11.00	<b>LOCK PRODUCT</b> <input type="checkbox"/> <b>SEND OUT QTY</b> <input type="checkbox"/>	
<input type="checkbox"/>	 #1 Success Injection System Flask Kit <small>By Dentsply Ltd</small> The gold standard of resins, the high-pressure Success Injection System drives resin into a closed flask to deliver precise adaptation of the model...	Benco Dental	1 storage
	<b>RETAIL PRICE</b> \$486.99 <b>ESTIMATED CLIENT PRICE</b> \$350.00	<b>LOCK PRODUCT</b> <input type="checkbox"/> <b>SEND OUT QTY</b> <input type="checkbox"/>	<span>Leave a Message</span>

Number of products in your ZEN Inventory

Click + to create/add storages (product lists)

Your Custom price, or Client Price

Filter/sort your list based on multiple criteria

Assign products to Storages

ZEN ZEN OUT 🔔 ? 🛒 🌐 👤

🔍 Start typing product name, vendor or product number Budget: \$3,040.62

**INVENTORY LIST (7)** 📁 ADD/EDIT Filter/Sort

ALL CEMENT CROWN & BRIDGE DISPOSABLES DR. DAVID'S FAVS ENDO FILES HYGIENE IMPLANTS  
IN HOUSE LAB INVISALIGN ORTHO PERIO SAFETY STERILIZATION WHITENING WIRES X-RAY ZOOM

**100% Cotton Nonwoven Sponges – Nonsterile, 4" x 4", 2l**  
★★★★★  
Richard Dental Cotton Co.  
100% Cotton Nonwoven Sponges – Nonsterile, 4" x 4", 2000/Pkg  
Patterson Dental

REQUIRED:  ON HAND:  1 Storage

Sub-Package QTY

**BeeSure Saliva Ejectors – 100/Pkg**  
★★★★★  
Cranberry  
BeeSure® Saliva Ejectors feature fixed, soft tips with smooth edges for patient safety and comfort.  
Patterson Dental

REQUIRED:  ON HAND:  1 Storage

Sub-Package QTY

**Braided Cotton Rolls – 2000/Case**  
★★★★★  
Crosstex  
Crosstex® Braided Cotton Rolls are made from 100% short fiber cotton and bound by thin strands of polyester filament.  
Patterson Dental

REQUIRED:  ON HAND:  2990 1 Storage

Sub-Package QTY

Chat

For product tracking assign QTYs to each product:

- Req QTY - how much of the product you need to have to be fully stocked
- QTY on hand - how much of the products actually have on hand
- Sub-Package QTY means you will track the product by the individual unit vs. the box

The screenshot shows the 'ZEN' interface for 'RESTOCK INVENTORY'. A search bar at the top contains the text 'Start typing product name, order or product number'. The budget is listed as '\$3,040.62'. The main section is titled 'DISPOSABLES' and contains three items:

Product	Supplier	Required Qty	Qty On Hand	Order Qty
BeeSure Saliva Ejectors – 100/Pkg Cranberry	Patterson Dental \$6.80 (Per 1 Item)	15	3	12
Patterson Combination HVE Aspirator Tips – 100/Pkg Patterson Dental Supply	Patterson Dental \$5.85 (Per 1 Item)	13	5	8
CwiWipes 1.6" x 6.75" wipes, canister of 160 Kerr TotalCare	Patterson Dental \$14.15 (Per 1 Item)	18	6	12

At the bottom, the 'ESTIMATED TOTAL' is \$333.59, and 'LEFT THIS MONTH' is \$3,040.62. A 'SEND ORDERS FOR APPROVAL' button is visible at the bottom right.

Zen will notify if the products is currently being shipped to avoid extra ordering

Simply the difference between Required QTY and QTY on-hand

Send to approval (for Assistants) or Approve (for Managers/Doctors)

Use Restock Inventory to have Zen build your order based on what you have used.

5

ZEN

DEMO DENTAL

Budget remaining: \$3,200.00

CREATE QUICK ORDER Filter/Sort

ALL DISPOSABLES DR. AWESOME PRODUCTS DR. NOT SO AWESOME STORAGE HALLWAY STORAGE  
HYGIENE MOST USED PRODUCTS ORTHO TREATMENT

**K1 Chrometal Polish Black**  
MAN: Pates Method  
DSTX: Senso Dental  
**contents:**  
Chrometal burnishing agent K1 is used to pre-buff chromium and other precious metals. Removes scratches. Produces a...

Client Price: **\$20.00**

**Lidocaine 2% EP1 1:50 D...**  
MAN: Septodont  
DSTX: Senso Dental  
**contents:**  
Lidocaine with 2% Epinephrine Injection, USP 1:50,000 Box of 50

Client Price: **\$40.00**

ADD

© ZenSupplies.com Leave a Message

Create Quick order by simply adding products from your inventory to a cart

Once all products are added - Review Shopping cart

Adjust QTY and select ADD

# Price Comparison and Approval

6

Last time products was purchased

Adjust quantities of the order

Zen savings based on the options selected above

Budget left to process this order

**ZEN** ZEN OUT

Start typing product name, order or product number Budget: \$3,040.62

RESTOCK APPROVAL **QUICK ORDER APPROVAL**

ALL STORAGE FROM INVENTORY EXACT MATCH LOWEST PRICE

Product	Quantity	From Inventory	Exact Match	Lowest Price
<b>Relyx Luting Plus Value Pack, 8.5 g, 3/Box, 3535</b> by: 3M Medical Products CREATED BY: Adam Hensley REQUIRED 5 ON HAND 5	1	\$214.16 Daily Dental ⬆ 5 Free (1 Day)	\$212.84 Dental City ⬆ 5 \$0.99 (3-4 Days)	\$212.84 Dental City ⬆ 5 \$0.99 (3-4 Days)
<b>100% Cotton Nonwoven Sponges – Nonsterile, 4" x 4", 2000/Pkg</b> by: Richmond Dental Cotton Co. CREATED BY: Adam Hensley REQUIRED 1 ON HAND 1	1	\$176.15 Patterson Dental ⬆ 4 Free (1 Day)	\$108.59 Dental Health Products, Inc. ⬆ 0 Free (5-6 Days)	\$176.15 Patterson Dental ⬆ 4 Free (1 Day)
<b>BeeSure Saliva Ejectors – 100/Pkg</b> by: Coarberry CREATED BY: Adam Hensley REQUIRED 15 ON HAND 3	1	\$6.80 Patterson Dental ⬆ 4 Free (1 Day)	\$2.80 Dental City ⬆ 5 \$0.99 (3-4 Days)	\$2.80 Dental City ⬆ 5 \$0.99 (3-4 Days)

Estimated Total: \$214.16 Show More

Estimated Total: \$176.15 Show More

Estimated Total: \$6.80 Show More

CURRENT SAVING \$0 (0%) Saved

ESTIMATED TOTAL COST: \$397.11  
LEFT THIS MONTH: \$3,040.62  
\* SALES TAXES NOT INCLUDED

PROCEED TO CHECKOUT

Products selected from inventory

Exact same product sold by different (or the same) supplier

**Lowest price option** - same product (or similar) manufactured by another company and sold by the same/less expensive distributor.  
- If the same as Inventory - usually means your price is the lowest  
- select Show more to see other options available

# Order / Shipment Verification

7

Once packages start arriving its important to **Verify every single order.**  
- Even if you are still waiting for the package - make sure to open an order and mark it as Backorder or missing

For purchases made out of Zen but related to dental supplies budget - use Out of Zen

Periodically check **Estimated Delivery** to know when to expect delivery from Distributors

**Monitor Payments in Zen:**  
- By distributor - distributor is charging you directly. Usually it's either they have your credit card on file or bill you with 30 days term  
- CC on File - means Zen was able to process credit card on file. Not all distributors are flexible and allow us to process the payments on your behalf

The screenshot shows the ZEN DEMO DENTAL interface. At the top, it displays 'Budget remaining: \$3,200.00'. Below this, there are tabs for 'LATEST ORDERS', 'ORDERS HISTORY', 'FREE GOODS', and 'OUT OF ZEN'. The 'LATEST ORDERS' tab is active, showing a table of orders. The table has columns for PO#, ORDER TYPE, DATE, ITEMS, DISTRIBUTOR, TOTAL, PAYMENT TERMS, STATUS, MORE, and ESTIMATED DELIVERY. Two orders are listed under the heading '2018 June':

PO#	ORDER TYPE	DATE	ITEMS	DISTRIBUTOR	TOTAL	PAYMENT TERMS	STATUS	MORE	ESTIMATED DELIVERY
022148-1	Restock Inventory	06-27-2018	3	Benco Dental	\$390.00	By Distributor	Confirmed	[icon]	06-29-2018
021989-1	Quick Order	06-26-2018	2	Benco Dental	\$356.38	By Distributor	Partially Verified	[icon]	06-26-2018

Below the table, there is a section for 'OUT OF ZEN ORDERS' with a plus sign icon. A message box below this section states 'No out of zen orders yet'. The interface also includes a sidebar with navigation options: Dental Catalogs, My Inventory, Restock Inventory, Quick Order, Office Supplies, Orders, and Reports. At the bottom, there is a footer with '© ZenSupplies.com' and a 'Leave a Message' button.



ZEN ZEN OUT Budget: \$2,640.51

Start typing product name, order or product number

Show Invoice Details

UPLOAD FILE & INVOICES

VERIFY ORDER

ALL PRODUCTS

ALL STORAGE	ORDERED QTY	ARRIVED QTY	PRICE	ACTIONS & STATUS
100% Cotton Nonwoven Sponges – Nonsterile, 4" x 4", 2000/Pkg 8406-0029	1	0	\$176.15	<input checked="" type="checkbox"/> <input type="checkbox"/> B <input type="checkbox"/> R <input type="checkbox"/> X
BeeSure Saliva Ejectors – 100/Pkg 8058-0012	1	0	\$6.80	<input checked="" type="checkbox"/> <input type="checkbox"/> B <input type="checkbox"/> R <input type="checkbox"/> X

ADD PRODUCTS ADD FREE GOODS

Show Activity ESTIMATED TOTAL: \$182.95

Using iPad access web browser, log in in Zen and verify orders from iPad.  
- Then you can take a picture of the invoice or a packing slip from an iPad

It will be super helpful if you:  
- Upload/scan invoices at the verification  
- Update your client pricing if there are discrepancies.

If the order arrived correctly you can select "Verify Order"

Once you received all products and select green button - make sure to select VERIFY

Select One of the Options:  
- ✓ If product arrived  
- B for back ordered items  
- R is for Request Return Label, we will email you the return label for, you just put it on the box it came in



ZEN ZEN OUT ? 🛒 ⚙️ 👤

Start typing product name, enter or product number Budget: \$2,995.52

- BACK**
- Full System Overview
  - Most Frequently Asked
  - Settings Overview
  - Dashboard**
  - Dental Catalogs
  - My Inventory
  - Restock Inventory
  - Quick Order
  - Office Supplies
  - Orders
  - Reports
  - Free Goods
  - ZenOut
- schedule time with our team
- 872-225-2090
- Download Simple Checklist

## Dashboard Overview



## How to customize Shortcut Tiles and how to set them up?



Use Help button and access Video Tutorials

Chat is the most popular way to get help from a Zen Expert

Call direct line to one of our team members



# Dental Supply Companies Contact and/or Login Information (1/9)

Ultradent

Rep: Lisa Sabatine

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- Cell: (609) 412-5811
- Best form of contact is texting

Hiossen

Rep: Joel

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- Cell: (856) 952-5635
- Best form of contact is calling

Kettenbach

Rep: Serkan Uluturk

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- Email: [s.uluturk@kettenbachusa.com](mailto:s.uluturk@kettenbachusa.com)
- Best form of contact is email



# Dental Supply Companies Contact and/or Login Information (2/9)

American Dental Rep:

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- Phone: (800) 331-7993

Benco Dental Rep: Chris Gray

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- Cell: (800) 462-3626 x
- Best form of contact is calling

Darby Dental Supply Rep: Kevin

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- Phone: (866) 309-9471 x1017
- Login: 524serenity
- PW: b8eqa5



# Dental Supply Companies Contact and/or Login Information (3/9)

## Dexis Platinum Rep:

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- Account #2290952
- Login: Lisa Work
- PW: supply1

## Dental City Rep:

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- Login: Serenitysmiledesigns@gmail.com
- PW: serenitysupply

## Amazon Rep:

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- Login: Serenitysmiledesigns@gmail.com
- PW: Serenity4095!



# Dental Supply Companies Contact and/or Login Information (4/9)

Ebay

Rep:

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- Login: Serenitysmiledesigns@gmail.com
- PW: Serenity4095!

Garrison

Rep:

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- Login: Serenitysmiledesigns
- PW: 524Dogwood!

Top Quality Gloves

Rep:

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- Topqualitygloves.com
- Login: Serenitysmiledesigns@gmail.com
- PW: 123glove



# Dental Supply Companies Contact and/or Login Information (5/9)

Henry Schein Rep: Analiz Aquino

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- [Henryscheindental.com](http://Henryscheindental.com)
- Cell: (609) 304-7264
- Login: drerik
- PW: Supply123

Henry Schein Rep: Carolena (Inside Sales)

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- Phone: (800) 372-4346 x2228505
- Phone: (800) 707-5678

Implant Direct Rep:

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- [Implantdirect.com](http://Implantdirect.com)
- Login: DrerikM@gmail.com
- PW: implant



# Dental Supply Companies Contact and/or Login Information (6/9)

Ivoclar Vivadent Rep: Jennifer DeProspo

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- Cell: (609) 230-2262

Parkell Rep:

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- Parkell.com
- Login: Serenitysmiledesigns@gmail.com
- PW: supply123

Patterson Dental Supply Rep: Dave Giordano

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- Cell: (856) 906-3104
- Pattersondental.com
- Login: serenitysmiledesigns@gmail.com
- PW: lisasupply1





# Dental Supply Companies Contact and/or Login Information (7/9)

## Pearson Dental Rep:

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- Pearsondental.com
- Account #96789
- PW: 524dogwood

## Picasso Rep:

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- Amdlasers.com
- Login: Serenitysmiledesigns@gmail.com
- PW: laser123

## Practicon Rep:

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- Phone: (800) 959-9505



# Dental Supply Companies Contact and/or Login Information (8/9)

Safco

Rep:

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- Account #123569
- Login: Serenitysmiledesigns@gmail.com
- PW: supply123\*
- PIN: 5751

Sterngold

Rep:

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- Login: drerik  
PW: 524dogwood

TScan

Rep:

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- Tekscan.com/store
- PW: tooth123



# Dental Supply Companies Contact and/or Login Information (9/9)

Great Lakes Dental  
Technologies

Rep:

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- [www.greatlakesdentaltech.com](http://www.greatlakesdentaltech.com)
- Login: SerenitySmileDesigns@gmail.com
- PW: Serenity4095!

Rep:

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Rep:

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# Supplies We Purchase From Select Vendors

## Hiossen

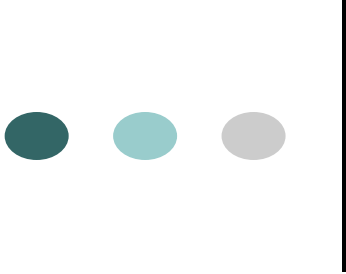
- Bone
- Glycolon sutures

## Kettenbach

- Impression material
- Futarfast
- Mucopren
- Tips and syringes for impression material

## Great Lakes Dental Technologies

- Retainer/whitening tray material



Specific Dates if/when Applicable for  
Purchasing