

WhatPill 1.2, Tutorial 4 - Inventory Fields

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(tutorial 4 of 10)

Topics covered:

- Inventory Fields and Screen

Accessing Inventory:

To follow in step with this tutorial select Vitamin category "Ginkgo Biloba", and the top brand-price (when sorted by cost): "Then", purchase "2: 60x60mg". If your sample data isn't "fresh", you should regenerate it now from WhatPill's menu option, "Regenerate Sample Data", found under submenu option "Sample Data", found under WhatPill's Config menu off the main display screen. From WhatPill's main display screen, you can go straight to the inventory fields for the current brand-price by clicking on the inventory button:



As you saw in the previous tutorial, this same button appears on the main edit screen for the brand-price fields -- you can access inventory from there too. Below is a diagram of WhatPill's inventory fields edit/display screen (top and middle sections rendered gray for the sake of printing):

how this screen was brought up

Category

Brand, purchase, price

Clears Inventory

Stop/Go control

Help

Inventory Fields Screen

Save

Abort

If you're using "fresh" sample data, you should see pretty much the same numbers on your screen as shown in the above figure, except the actual dates will be different. That is, you should have about 71 days before running out, but your actual date of run-out and your "AsOf" date will be adjusted to when you last refreshed the sample data.

This screen, like the main brand-price edit screen covered in the previous tutorial, is also divided into three sections. We'll talk about each section now in order, top-down:

Top Section (blue background): How invoked and brand-price identification:



Top Section - Brand Display and how invoked

These fields just identify the brand-price you're looking at. But notice the "Access Inventory Fields" subtitle to the screen: this subtitle can take on any of three different values, depending on how the inventory fields screen was brought up:

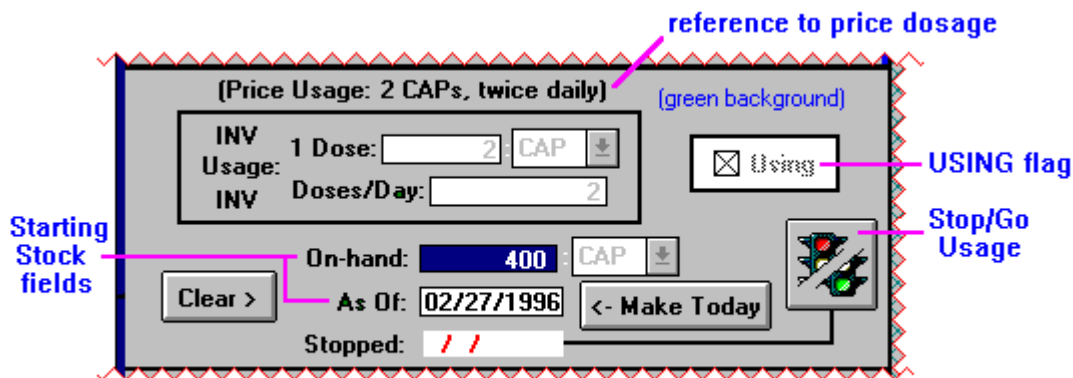
Access Inventory Fields (user clicked on Inventory Button)

USE Stopped, Verify/Adjust Inventory (Stop/Go Button from main display)

USE Resumed, Verify/Adjust Inventory (Stop/Go Button from main display)

We'll explain about the latter two towards the end of this tutorial.

Middle Section (green background): Inventory fields and control buttons:



Middle Section - Inventory Fields & Controls

At the top of this section is a parenthetical stating what the current price dosage is. Price dosage is used for all the calculated comparison costs, you remember, and was accessed from the main brand-price edit screen covered in the previous tutorial. Below it, surrounded by a box, are the three fields for setting the inventory dosage. The inventory fields are used by WhatPill to calculate your runout dates for stock on hand and for creating orders to extend your supplies. They are ignored unless inventory is present (On-hand is > 0). The inventory dosage fields are the exact same kind of fields you saw under the price dosage:

"1 Dose" and **Units** drop-down: set to quantity taken at one time

"Doses/Day": set to number times per day dosage is taken

Everything said about these fields under setting the Price Dosage applies to the Inventory dosage fields, and won't be repeated here. Remember that the units drop-down will only show units of the same type as the Bought Units setting, whether Pill, Weight, Volume, or Length, and if Pill, it will be frozen at the same pill type selected under Bought Units. Remember also that as long as the product of the two entries truly reflects your average daily dosage, WhatPill's calculations of runout dates, etc will be true.

The first thing you may notice on this screen is that the Inventory Dosage fields are all disabled. They are grayed out, and you can't access them. That is because there is inventory entered for this brand-price, and the date of entry ("As Of") was before today (a month ago, in

fact). WhatPill can't allow you to play around with the inventory dosage willy-nilly while stock is entered, because this is what tells her what your stock on hand today is. She forces you to adjust the "starting stock" fields so that they are for today (or in the future), before she will allow you to adjust the inventory dosage. There's a special button ("Make Today") for doing this in a snap, and we will show how it works a little later, but first let's take a look at all the fields and controls on this section in detail:

On-Hand: All WhatPill needs to track your inventory is a starting stock amount and your average daily usage. The starting stock amount is defined by the "On-Hand" and "As Of" fields. On-Hand has two fields, a quantity and a units drop-down, which you are familiar with. In this sample, we see 400 capsules were the starting stock on-hand amount. (The units is disabled because the type of units is Pill, as explained under "Bought Units" in the discussion of WhatPill's main edit screen for brand-prices.)

As Of: Date the On-Hand amount was put in use. Note that this date is a "morning" date, before any of the stock is consumed. In this screen shot, 2/27/1996 (your sample date will be different) was the starting date for this inventory, meaning that you started taking the dosage amount (4 capsules a day here) on this day.

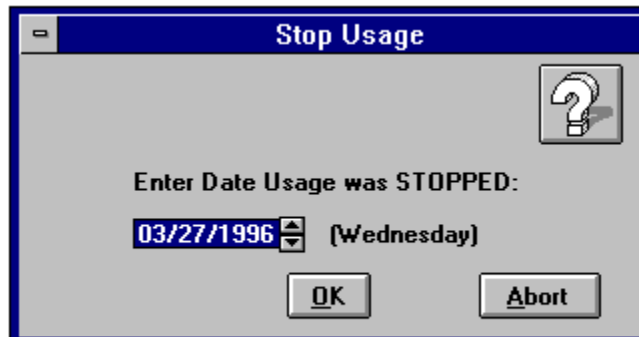
WhatPill allows you to adjust these two fields at will. You may wish to plug in some different values for the date and the 400 amount, seeing how the below calculated fields change, right now. Remember you can triple-click within the fields to select all that's currently in there, in preparation for entering a brand new value from scratch. Or you can just position the text cursor by clicking where you want it and using the normal **Delete**, **backspace** and number keys to set a field to what you want. You must exit the field (**tab** or **Enter**) before the calculated values will be refreshed, of course. Note that if you put in a future date for "AsOf", the inventory dosage fields become enabled. But put all fields back to their original values before going on here...

Stopped: You can't enter directly into this field, you may have noticed. It's set or cleared by using the **Stop/Go** control button. Sometimes you start taking a supplement but then decide to stop taking it for awhile. This field allows WhatPill to handle this with aplomb. The presence of a date in this field means that you stopped taking the supplement on that date (as of the morning of the date, before any pills would have been taken).



— **Stop/Go button**

Let's try this out right now. Have the "On-Hand" and "As Of" fields as they were when you first brought up this screen (400 capsules for "On-Hand" and a month ago for the "AsOf" date). Click on the **Stop/Go** control button. You'll see the below screen popup:



Date confirmation, Stopping Usage

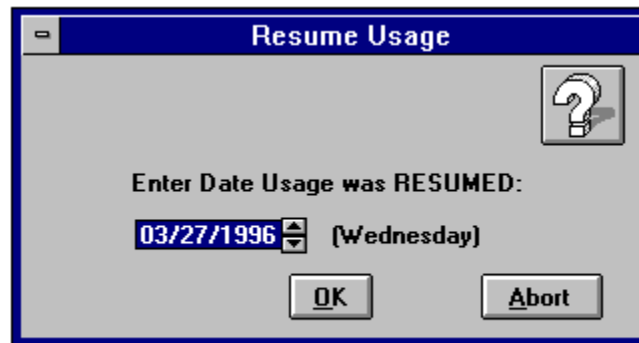
WhatPill knows you're stopping because the Stopped date was empty when you clicked on the **Stop/Go** control. WhatPill needs to know when you stopped taking the supplement. This is the date the morning of which you

stopped, before you would have taken any pills. The default is today's date, which you can over-write by just typing in a different date (remember to type two digits for the month and the day and don't type the "/"), or use the steppers to adjust the given date up or down. The day of week appears to the right of the date's entry field to help you.

Let's pretend you stopped taking it 3 days ago. Click on the little down-arrow of the stepper control 3 times so the date reads 3 days ago (in the screen shots for this tutorial, this will be 3/24/1996, but with your refreshed sample data, it will be whatever date was three days ago from today's date). Before you click on **OK**, notice what the calculated value "Today's On-Hand:" reads (you can still see it on the inventory screen immediately below this popup: it's 284. Now click on **OK** and see how the date was stuffed in the Stopped field. But also notice that "Today's On-hand:" now reads 296. After all, you stopped 3 days ago, that means $3 \times 4 = 12$ capsules WhatPill originally thought you had taken were not taken, so you have 12 more than your original 284. You will also see that the "# days before running out:" is at 74 now instead of 71. The "Date of Run-out:" is now blank, since it's meaningless for stopped inventory.

The original starting stock amount and date are unaltered - all WhatPill needs is the stopped date and everything else can be calculated. As long as the stopped date is present, your inventory will remain at 296 capsules. The dosage fields are still frozen, for the same reason as before.

Let's see what happens now when we resume usage. This is done with the same **Stop/Go** control button. Click on it now and see this popup come up:



Date confirmation, resuming usage

WhatPill sees that a stopped date was present, so she knows you're resuming usage now. She needs to know the date (morning again, before any pills taken) when you started back up on the supplement. Again, the default date is today's date. Let's pretend we started back

up today, so just leave the resume date as it is and click on **OK**. When the popup goes away, you will see:

The screenshot shows a control panel for a supplement. At the top, there are fields for '1 Dose: 2 CAP' and 'Doses/Day: 2'. A 'Using' checkbox is checked. Below these are 'On-hand: 296 CAP' and 'As Of: 03/27/1996'. A 'Stopped' field contains '//' and a '<- Make Today' button is visible. At the bottom, a 'Calculated values' section shows 'Today's On-hand: 296 CAPs', 'Date of Run-out: 06/09/1996', and '# days before running out: 74'. A traffic light icon is also present on the right side.

After resuming with today's date (3-27-96)

Note what has happened: WhatPill has made the "As Of" date the resume date, and replaced the "On-hand" value with the 296, the value left after we had stopped usage. In other words, she's "jumped the gap" of our stopped interval, not losing any tally, and has a new start point for all future inventory calculations. The stopped field is empty again, indicating we are now taking the supplement at the specified dosage.

Note also that the dosage fields are now enabled. This is because our resume date was today. If we had use yesterday as our resume date, the dosage fields would still be disabled, for the reason stated earlier. In the calculated values below, you still see the 296 CAPs for today's on-hand, and the 74 days before running out (since we resumed today, there hasn't been a day's passage yet which would reduce them), but we now have the date of run-out as well, since we're no longer stopped.

Since the dosage fields are now enabled, you might want to play with their values a little, seeing how the bottom section's calculated values are immediately updated and refreshed for each change you make in your daily dosage level.

The 'Using' checkbox is checked. A pink line connects it to the 'U' column in the table below.

Brand	U	From	G	Purchase
Then	X	HH	&	2: 60x60mg
Then		HH		240x60mg

USING flag: If you've been paying attention you will have noticed that the state of this flag changed when, in the examples above, we put in a stopped date. Note that the field is disabled -- you can't set it directly by clicking on it. It is always disabled when there is inventory present (On-Hand > 0), as the presence or absence of a "Stopped" date solely determines it's setting in this case: if a stopped date is present, then it's cleared, indicating that the supplement is not being taken. If the stopped date is empty, then it's set (checked), indicating that this supplement is "in-use". You can see the state of this flag in the main screen Prices browse under field title "U". There will be an "X" there if it's set.

Note: If there is no inventory, then this control is enabled, and you will be able to set its state by clicking on it. However, in the case where there is no inventory, you would not need to bring up the inventory screen to change it's state -- you could just click on the **Stop/Go** button that is on WhatPill's main control screen with the desired brand-price current. Clicking on **Stop/Go** for a brand-price having no inventory merely toggles the state of the using flag.

However, when you click on the **Stop/Go** button from WhatPill's main control screen with


a current brand-price that has inventory, WhatPill will throw up the Inventory screen, and prompt you with the date confirmation prompt of exactly when you stopped/resumed your usage. After dealing with the date confirmation prompt, WhatPill will leave you with the Inventory Screen up so you can check things out. You can either **Save** or **Abort** from the Inventory screen, depending if you want to confirm your changes or not. This is the other way mentioned above that the inventory screen can be invoked, where the subtitle to the screen will read either:

USE Stopped, Verify/Adjust Inventory or
USE Resumed, Verify/Adjust Inventory

Why have a USING flag? The only reason for the USING flag is that I thought some people might want to use WhatPill for price comparisons and listing the supplements they are taking in some of the reports, but not wanting to bother with entering and tracking their inventory. (Some of the reports will list brand-prices with no inventory along with brand-prices with current inventory if the USING flag is set for them). As long as you enter inventory for the supplements you are using, you can forget about having to set this flag -- it will be automatic.

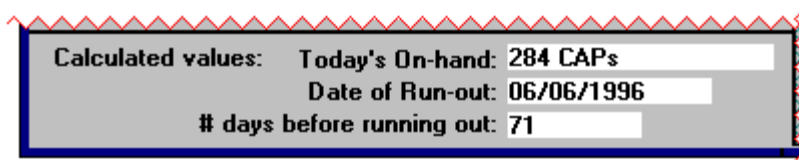
 — **Clear Inventory button**

Just a fast way to clear all the inventory fields. When inventory has lapsed (runout) and you don't intend to renew it, this will clear the fields instantly.

 — **Make Today button**

Usually the need to use this control is because you're changing the dosage level on a supplement you are currently taking. Since WhatPill will not allow you to adjust the inventory dosage with inventory present unless the "As Of" date is today or in the future (she'd lose her tally if she did), this operation is not all that rare. Just click on the button at any time (you can use it to enter today's date when entering new inventory too). WhatPill will take what you see in the bottom section's calculated values of "Today's On-hand:" and stick that in the starting stock "On-Hand:" field, and put today's date in the "As Of" field. If a stopped date was present when you clicked on "Make Today", it is carried over as well, but is also set to today's date. Once "As Of" is today, you can adjust the dosage levels as much as you like.

Bottom Section (gray background): **Calculated fields:**



Calculated values: Today's On-hand: 284 CAPs
Date of Run-out: 06/06/1996
days before running out: 71

Bottom Section - calculated values

We've already covered these fields pretty much in talking about the entry fields and controls. They are calculated fields only -- you don't enter into them. They are refreshed instantly upon change of any field in the middle section.

Today's On-hand: tells you how much of the particular brand-price you now have on the shelf. (As of this morning, before you took anything for the day.)

Date of Run-out: gives the date that this supplement will run out on. Any time there is a "Stopped" date present, this date is meaningless and will be blank here. This date can be in the past if the inventory has lapsed.

days before running out: tells you in days how much time you've got before you're out of it. Unlike the above field, this value still has meaning if there is a stopped date: it's the number of day's use you'd get if you were to resume usage of the supplement. This value can be negative, in the case of lapsed inventory, telling how many days you've gone without the supplement.

Right-Hand Screen Controls:



— Help



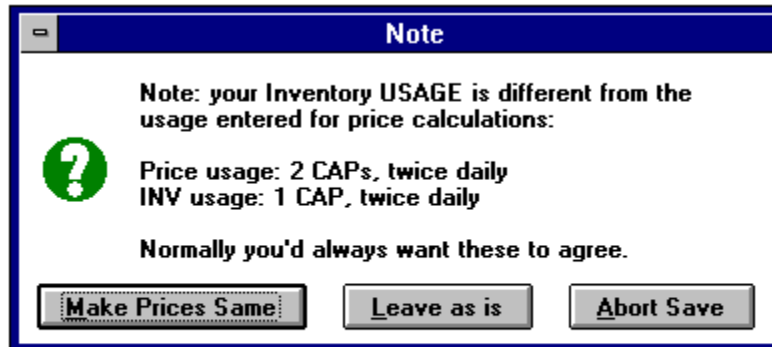
— Save



— Abort

These are self-explanatory by now, I hope. On-screen concise help text is available with the "Help" button. Use "Save" to save all your fields. Use "Abort" to quit, leaving all fields as they were when the screen was originally invoked.

When you **Save** from the Inventory Screen with inventory entered, WhatPill checks what you have for the Inventory usage against what the Price usage is set at. Normally you'll always want these to agree. If they are found to be different, WhatPill will prompt you with something similar to:



Upon Saving from Inventory Screen, if Inventory usage differs from Price usage

You can elect to leave them different, but unless there's a very good reason to do so (I can't think of one myself), you should click on "Make Prices Same". This will automatically bring the price usage in line with what you're actually taking, so that all comparison cost calculations will now reflect your true usage of this supplement. By the way, if you do click on "Make Prices Same", and WhatPill has to change the price dosage "1 Dose" amount, WhatPill checks the potency entry and if it's non-zero, will prompt you with a message saying you need to fix the potency entry now that the "1 Dose" value has changed. (Remember potency is defined per Dose).

Entering New Inventory on top of old -- two scenarios:

If you just purchased more of a particular brand-price for which you already have inventory entered into the program, all you need do is add the newly acquired amount to the existing On-hand quantity. Since all quantity fields in WhatPill handle arithmetic expressions, you can click just right of the last digit of the current on-hand amount (in the starting stock "On-Hand" field) and type "+" followed by the quantity just purchased (as long as what you add on is in the same units!). Upon exiting the field (by hitting **Enter** or **tab**), the summation will be made and you'll see the new on-hand amount and the calculated fields seen below will now reflect the new run-out dates and days to go. If you want for some reason the "As Of" date to reflect when the On-hand quantity was last updated, you could click on "Make Today" before adding on the new inventory (or after).

If you have just purchased a brand-price of a category for which you have current inventory for a different brand-price, and you want to wait until you finish up on the old brand-price before beginning to use the new, you can do one of two things:

- a) enter the new brand-price inventory with today's date as the "As Of" date, but enter also a "Stopped" date of today's date as well. So it's in there, waiting. When the old brand runs out, all you have to do is resume the new brand from WhatPill's main control screen (by clicking on the **Stop/Go** control with the new brand-price current).

b) enter the new brand-price inventory with a future "As Of" date, that date being the run-out date of the old brand-price. When the old brand runs out, you can always make any adjustments necessary to the new brand's "As Of" date, due to the old brand not running out exactly when WhatPill predicted (as happens when you skip a dose or two over time).

Lapsed Inventory

When Inventory runs out on a brand price, it will come up listed under "Lapsed Inventory" in the In-Use Report (qv) and on the alerts function. Normally, you'll want to clear the inventory fields of a Brand-Price once it's run out and you're not going to renew it. But if you are going to renew it, it's best to leave the lapsed inventory in the fields, so it will continue to list under "Lapsed Inventory" in reports and in WhatPill's Alerts feature (so you will continue to be reminded that you need to get it).

That's it! -- no more to learn about WhatPill's inventory fields and how she tracks your stock. Look around the sample data now and edit various brand-price's inventory fields to make these new concepts clear to you. In the next tutorial we will look at both the Inventory Report and the In-Use Report (among others), which should further clarify your understanding of WhatPill's treatment of inventory.

End, tutorial 4