



Hybrent SOP

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Version History

Date	Version	Updated By:
06/30/22	1.0	Solounge Y. Bowen

Credentials

Signing In

- If you have a Hybrent account created and this is your first time signing in, below are the needed.
 - Link to Hybrent : [Link](#)
 - Username: **first name initial + last name**
 - Password: **hybrent**
 - This should prompt you to change your password
 - GreenHouse
- Greenhouse Onboarding Site : [Link](#)

Facility

New Vendor Adds

- Before proceeding with adding the vendor into Hybrent please assign the ticket to yourself and change the status of the ticket to “**Needs Approval**” so that you can set Sarah Kerin as an approver

To Be Reviewed ▾

Fulfill Request → FULFILLING REQUEST

Request Approval → **NEEDS APPROVAL**

Reject → REJECTED



Request Approval

Reporter
Michael Lee

Start typing to get a list of possible matches.

Linked Issues
causes

Issue
+
Begin typing to search for issues to link. If you leave it blank, no link will be made.

Assignee
Chinyere Ibeabuchi

Assign to me

Priority
Lowest

Labels
Begin typing to find and create labels or press down to select a suggested label.

Request participants

<p>Stores the users that are participants in Service Desk customer portal requests. This custom field is created programmatically and required by Service Desk.</p>

Approvers
Sarah Kerin x

Organizations

Stores the organizations that are associated with a Service Desk customer portal requests. This custom field is created programmatically and required by Service Desk.

Linked assets

Link assets to an issue. This custom field is created programmatically and required by Jira Service Desk.

Type of Hybrent Request
Add Supplier

Item Description

Supplier Phone Number

Request Approval Cancel

- Once you get the the approval you can proceed with adding into Hybrent
- For Vendor Adds, the Hybrent Team adds this for Kindbody
 - Contact: **Emma Knox**



-
- E-mail: `emma@hybrent.com`
 - Typically send a weekly email to Emma asking if the newest set of suppliers added to the vendors list to be added into Hybrent
 - This can take the Hybrent team approx ~ **1wk**
 - Currently KB and Hybrent team are using the [Org Master file](#) in the “**Vendors**” tab to keep track of all the listed vendors within Hybrent
 - Anyone who would like to submit a request/ticket for a vendor add can use the Hybrent Form and answers all of the questions needed to fill out the [Org Master file](#)
 - After entering the Org Master, upload the given W9 form & vendor form for the vendor and add it to the [W9 Folder](#) & [Vendor Form Folder](#)

Redirecting Vendor Add Tickets

- In some instances, users will submit an “Add Supplier” ticket without attaching the required W9. If you ever experience this, here is the recommended workflow.
 1. Complete the steps above in “New Vendor Adds”, and instead of closing the ticket reassign to (user name) will obtain the W-9 and Vendor Form, she will add it to the W-9 and Vendor Form Folders

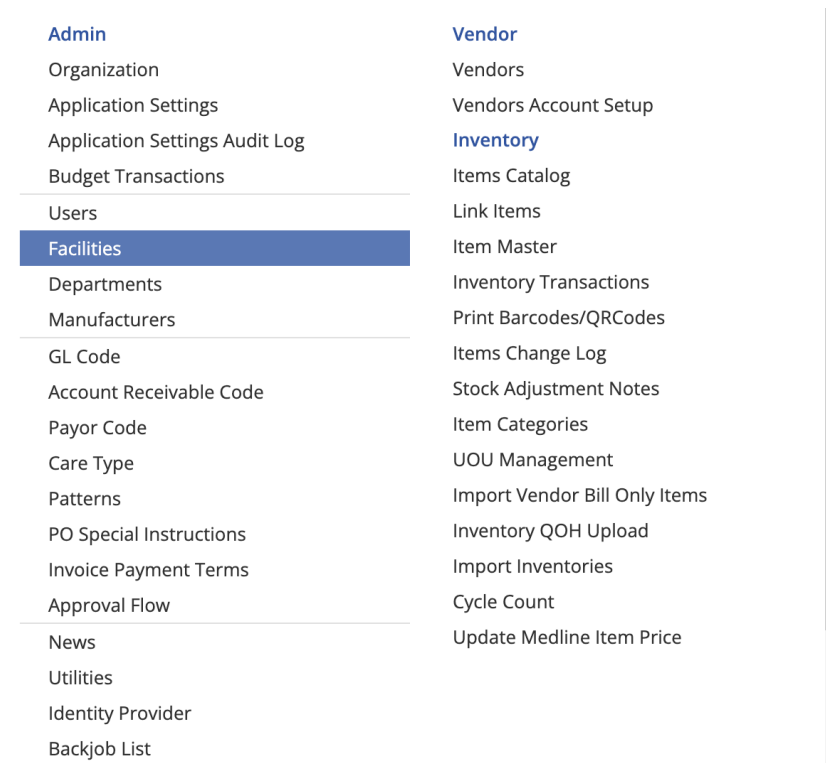
Vendor Account SetUp

1. Click on to the “**Admin**” tab and choose the “**Vendors Account Setup**” button
2. Proceed with selecting and searching for the desired vendor
3. Use the search facility box to enter the facility and click enter.
4. If the “**Account Number**” is blank you can refer to the [Vendor Account Number](#) sheet to see if there is anything for the desired vendor.
5. Anything that is set to **green** on the sheet has already been added to Hybrent



New Facility Setup

1. Click on to the “**Admin**” tab and choose the “**Facilities**” button



2. Click the “**Add**” button



Enter the required fields for the Facility Detail and the addresses

- Mnemonic - typically the name of the location
- Third Name: **Location |Kindbody Inc. : KBI Services, Inc.**
- License Count- set to “ 1 “
- Shipping Address - the new facility address



e. Invoice Address- **120 Fifth Avenue, Fifth Floor New York, NY 10011**

Facility Detail	Shipping Address	Invoice Address
Organization*	kindbody [kindbody]	
Mnemonic*	Atlanta	
Name*	Kindbody Atlanta	
Second Name	Atlanta	
Third Name	Atlanta Kindbody Inc. : KBI Services, In	
License Count*	1	
Use Logo	<input type="checkbox"/> NO	

3. Click the “**Save**” button



Import Bulk (Facilities, Dept, User, Patient)

1. Click on to the “**Admin**” tab and choose the “**Utilities**” button

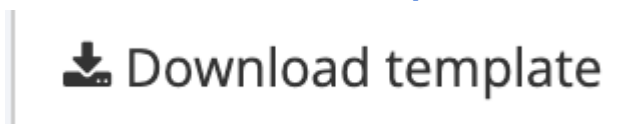


Admin	Vendor
Organization	Vendors
Application Settings	Vendors Account Setup
Application Settings Audit Log	Inventory
Budget Transactions	Items Catalog
Users	Link Items
Facilities	Item Master
Departments	Inventory Transactions
Manufacturers	Print Barcodes/QR Codes
GL Code	Items Change Log
Account Receivable Code	Stock Adjustment Notes
Payor Code	Item Categories
Care Type	UOU Management
Patterns	Import Vendor Bill Only Items
PO Special Instructions	Inventory QOH Upload
Invoice Payment Terms	Import Inventories
Approval Flow	Cycle Count
News	Update Medline Item Price
Utilities	
Identity Provider	
Backjob List	
System Tool	
Integration	
Hybrent Apis	

2. Select the “Go” button under “Import”



3. Click “the “Download template” button to receive the file



4. Fill in the template, click “Choose File” , and upload the file into Hybrent



Choose File

No file chosen

Upload

New Department Setup

5. Click on to the “**Admin**” tab and choose the “**Departments**” button

Admin	Vendor
Organization	Vendors
Application Settings	Vendors Account Setup
Application Settings Audit Log	Inventory
Budget Transactions	Items Catalog
Users	Link Items
Facilities	Item Master
Departments	Inventory Transactions
Manufacturers	Print Barcodes/QR Codes
GL Code	Items Change Log
Account Receivable Code	Stock Adjustment Notes
Payor Code	Item Categories
Care Type	UOU Management
Patterns	Import Vendor Bill Only Items
PO Special Instructions	Inventory QOH Upload
Invoice Payment Terms	Import Inventories
Approval Flow	Cycle Count
News	Update Medline Item Price
Utilities	
Identity Provider	
Backjob List	

6. Click the “**Add**” button

Add

7. Enter the required fields for the window



-
- a. Mnemonic - Typically the first two or three letters of the location name followed by a #
- i. **Billing= 15**
 - ii. **Clinical = 1**
 - iii. **Lab = 2**
 - iv. **Corporate = 5**
 - v. **Customer Experience = 7**
 - vi. **Engineering/Tech = 3**
 - vii. **Enterprise Sales = 9**
 - viii. **Facilities/Construction = 4**
 - ix. **Finance = 10**
 - x. **Marketing = 8**
 - xi. **People = 6**
 - xii. **Practice Ops = 13**
 - xiii. **Product = 11**

Facility*	<input type="text" value="Kindbody Atlanta"/>
Mnemonic*	<input type="text" value="ATL1"/>
Name*	<input type="text" value="Clinical"/>
Second Name	<input type="text"/>
Third Name	<input type="text"/>

8. Click the “**Save**” button



Save

New Facility Approval Workflow Setup

Click on to the “[Admin](#)” tab and choose the “[Approval Flow](#)” button

Admin

Organization
Application Settings
Application Settings Audit Log
Budget Transactions

Users

Facilities
Departments
Manufacturers

GL Code
Account Receivable Code
Payor Code
Care Type
Patterns
PO Special Instructions
Invoice Payment Terms

Approval Flow

News
Utilities
Identity Provider
Backjob List

Vendor

Vendors
Vendors Account Setup

Inventory

Items Catalog
Link Items
Item Master
Inventory Transactions
Print Barcodes/QRcodes
Items Change Log
Stock Adjustment Notes
Item Categories
UOU Management
Import Vendor Bill Only Items
Inventory QOH Upload
Import Inventories
Cycle Count
Update Medline Item Price

Click the “[Add](#)” button



Add

Enter the name of the new facility followed by linking the Facility

Name*

Kindbody Glenview V2

Facilities*

Kindbody Glenview V2

Vendors*

All Vendors

Click the “**Save**” button

Save

Search and select the “**Manage Flow**” button for newly added facility

Name

Kindbody Glenview V2

(1 Facilities)

Manage flow

Manage Facilities / Vendors



Click the “**Add Level**” button to set up the structure for this facility starting off with Level 1

Add Level

Once you add users to their correct level, click the caret dropdown and select “**Add Rule**” to add a limit to PO amounts. Always set the Cutoff time to **24 hrs**



- When setting up the approval flow, make sure that there is a person for the desired department in each level to avoid any stuck PO's
 - Use this [Approval Workflow Sheet](#) as a reference
- When creating a new workflow , make sure to add the following people for initial set up (screenshot added below)
 - Finance
 - Sarah Kerin
 - Facilities/Construction
 - Heather Mendell
 - Tim Ebervein
 - Brady Titus
 - Gregory Spires
 - Clinical
 - Jeannette Norris
 - Richie Altmanshofer
 - Craig Gladstone
 - Engineering/Tech
 - Amanda Mckeen
 - Sam Yunker



- Moises Castillo
- Richard Forsythe

Level 1	Level 2	Level 3	Level 4
<div><div>A</div><div>N/A amanda.mckeen@kindbody.com</div><div>Kindbody HQ Engineering/Tech Main Supply</div></div>	<div><div>R</div><div>N/A richie.altmanshofer@kindbody.com</div><div>Kindbody HQ Corporate Main Supply</div></div>	<div><div>R</div><div>N/A Richard.Forsythe@kindbody.com</div><div>Kindbody Flatiron Engineering/Tech Main Supply</div></div>	<div><div>S</div><div>N/A sarah.kerin@kindbody.com</div><div>Kindbody HQ Finance Main Supply</div></div>
<div><div>E</div><div>N/A emma.boockvar@kindbody.com</div><div>Kindbody HQ Facilities/Construction Main Supply</div></div>	<div><div></div><div>N/A sam.yunker@kindbody.com</div><div>Kindbody HQ Engineering/Tech Main Supply</div></div>	<div><div>H</div><div>N/A heather.dacorte@kindbody.com</div><div>Kindbody Flatiron Facilities/Construction Main Supply</div></div>	
<div><div>G</div><div>N/A glen.smith@kindbody.com</div><div>Kindbody HQ Facilities/Construction Main Supply</div></div>	<div><div>B</div><div>4158457239 brady.titus@kindbody.com</div><div>Kindbody Flatiron Facilities/Construction Main Supply</div></div>	<div><div>J</div><div>N/A jeannette.norris@kindbody.com</div><div>Kindbody Flatiron Clinical Main Supply</div></div>	
	<div><div>G</div><div>N/A gregory.spire@kindbody.com</div><div>Kindbody Flatiron Facilities/Construction Main Supply</div></div>		
	<div><div>T</div><div>N/A tim.ebervein@kindbody.com</div><div>Kindbody Flatiron Facilities/Construction Main Supply</div></div>		
	<div><div>C</div><div>N/A Craig.Gladstone@kindbody.com</div><div>Kindbody DC Clinical Main Supply</div></div>		



Users

User Approval Workflow

1. Click on to the “**Admin**” tab and choose the “**Approval Flow**” button

Admin

Organization
Application Settings
Application Settings Audit Log
Budget Transactions

Users

Facilities
Departments
Manufacturers

GL Code

Account Receivable Code

Payor Code

Care Type

Patterns

PO Special Instructions

Invoice Payment Terms

Approval Flow

News

Utilities

Identity Provider

Backjob List

Vendor

Vendors

Vendors Account Setup

Inventory

Items Catalog

Link Items

Item Master

Inventory Transactions

Print Barcodes/QRCodes

Items Change Log

Stock Adjustment Notes

Item Categories

UOU Management

Import Vendor Bill Only Items

Inventory QOH Upload

Import Inventories

Cycle Count

Update Medline Item Price

2. Search and select the “**Manage Flow**” button for desired facility that you would like to add the user to



Name

Kindbody Glenview V2

(1 Facilities)

[Manage flow](#)

[Manage Facilities / Vendors](#)



3. Select the “+” button in the correct level the user would be placed in



4. Enter the required fields and click the “**Save**” button



- When setting up the approval flow, make sure that there is a person for the desired department in each level to avoid any stuck PO's
- If you are unsure which Dept this person would belong to please this [Document](#) for reference



User Adds

1. Click on to the “**Admin**” tab and choose the “**Users**” button

Admin	Vendor
Organization	Vendors
Application Settings	Vendors Account Setup
Application Settings Audit Log	Inventory
Budget Transactions	Items Catalog
Users	Link Items
Facilities	Item Master
Departments	Inventory Transactions
Manufacturers	Print Barcodes/QRcodes
GL Code	Items Change Log
Account Receivable Code	Stock Adjustment Notes
Payor Code	Item Categories
Care Type	UOU Management
Patterns	Import Vendor Bill Only Items
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Identity Provider	
Backjob List	

2. Click the “**Add**” button



3. Enter in the required fields in the “**User**” tab



User	User Access	Item Catalog Access	PO Alerts	Vendor Access	Notification Access
------	-------------	---------------------	-----------	---------------	---------------------

Name*	<input type="text" value="Solounge Bowen"/>				
Employee Number*	<input type="text" value="1"/>				
Nickname*	<input type="text" value="sbowen"/>				
Email*	<input type="text" value="sbowen@kindbody.com"/>				
Phone	<input type="text"/>				
Facility*	<input type="text" value="Kindbody HQ"/>	<input data-bbox="1024 898 1073 932" type="button" value="+"/>			
Department*	<input type="text" value="Engineering/Tech"/>	<input data-bbox="1024 968 1073 1001" type="button" value="+"/>			
Inventory*	<input type="text" value="Main Supply"/>	<input data-bbox="1024 1037 1073 1071" type="button" value="+"/>			
Joining Date	<input type="text" value="01/16/2022"/>				<input data-bbox="1084 1106 1117 1140" type="button" value="📅"/>
Status	<input data-bbox="623 1167 708 1201" type="button" value="Active"/>				

4. Click the “**Vendors Access**” tab and click onto the three dot icon following by “**Select All**” button, this will cause all the vendors to appear



Select all



Add User



User User Access Item Catalog Access PO Alerts Vendor Access Notification Access

'PMB" Pacific Magazine Billing, LP x 120 Partners LLC x 1260 Santa Monica Medical Plaza, LP x
16 EAST 40 REALTY LLC x 3005 Peachtree NE Owner LLC x 333 Rentals LLC x 3M Medical x
4Imprint, INC. x 618/314 Metro East Mobile Notary x A Joy Films LLC x A-Arrow Lock & Key Co. x
A-LIGN Compliance and Security Inc x AAB PROFICIENCY TESTING SERVICE x Able Services x
Absolute Pest Inc. x ABW Medical LLC x Accent x Accurate Document Destruction Inc. x
Accurate Repro Inc x Acertitude x ACF Tech Consulting LLC x Active Wellness, LLC x
Admiral Courier x ADP, Inc. x AdvaGenix International LLC x
Advanced Environmental Services, Inc. x Advanced Resources x Advantage Business Equip. x
Advocate Good Samaritan Hospital x Advocate Good Shepherd Hospital x
Advocate IMMC Medical Staff Fund x Advocate Lutheran General Hospital x Aero-Med LTD x
AeroMed Technologies x Aetna Felt Corp. x Affordable Signs & Lighting x AIRCLEAN SYSTEMS x
AIRGAS USA x Alchemy Web Marketing x Alissa Alter x All County Electric Llc x
Allan Industries Inc. x Allen Consulting Inc. x Alliant Insurance Services, Inc. x
Alpha Cleaning Company x Alpha Graphics x ALSCO INC x Alternative Source Medical x
Altorfer Industries, Inc. x AMAZON x Amber Lopez x Ambius x

5. Click the “**Notification Access**” tab and adjust accordingly



User
User Access
Item Catalog Access
PO Alerts
Vendor Access
Notification Access

Event	Mobile Push	Email Notification	Web Notification
Purchase Order Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Confirmation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Shipped	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
QOH Less Than Par Level	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Template Schedule Create PO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Rejected	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Initiated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Updated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Received	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Rejected	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Add News	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice Threshold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

6. Click the “**Save**” button



7. When you create a user’s new account , a pop up window will appear asking to update facility access and you can click “**Yes**”

● Leave the following fields as is:

- **User Access**
- **Item Catalog Access**
- **PO Alerts**



User Facility Access

1. Click on to the “**Admin**” tab and choose the “**Users**” button

Admin	Vendor
Organization	Vendors
Application Settings	Vendors Account Setup
Application Settings Audit Log	Inventory
Budget Transactions	Items Catalog
Users	Link Items
Facilities	Item Master
Departments	Inventory Transactions
Manufacturers	Print Barcodes/QRCodes
GL Code	Items Change Log
Account Receivable Code	Stock Adjustment Notes
Payor Code	Item Categories
Care Type	UOU Management
Patterns	Import Vendor Bill Only Items
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News	Update Medline Item Price
Utilities	
Identity Provider	
Backjob List	

2. Search for the desired user and click the caret dropdown and select “**Update Facility Access**”



Edit Details

Update Facility Access

Change Password

3. Click the “**Assign Access**” or “**Remove Access**” button

Remove Access

Assign Access

4. Click the three dots to then select the desired facility you wish to update.

Select Facilities



5. If assigning access the set up should look like this.



Vios Aurora

☐ Select all

Orders <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>	PO Shipment Notification <input checked="" type="checkbox"/>
Receive PO <input checked="" type="checkbox"/>	Activity Report <input checked="" type="checkbox"/>	PO Invoice Notification <input type="checkbox"/>
Edit PO <input type="checkbox"/>	Top Items Purchased <input checked="" type="checkbox"/>	Order Template <input checked="" type="checkbox"/>
Delete PO <input type="checkbox"/>	Current Cost By Account <input type="checkbox"/>	Add Order Template <input checked="" type="checkbox"/>
Can See Price <input checked="" type="checkbox"/>	Current Items By Status <input type="checkbox"/>	Edit Order Template <input checked="" type="checkbox"/>
Can Change Receive Date <input checked="" type="checkbox"/>	Monthly Value Of Purchase Order By Ship to Location <input type="checkbox"/>	Delete Order Template <input type="checkbox"/>
Shop <input checked="" type="checkbox"/>	Monthly Variance by Ship to Location <input type="checkbox"/>	Use Order Template <input checked="" type="checkbox"/>
Punchout <input type="checkbox"/>	Cost By GL <input type="checkbox"/>	Invoice <input type="checkbox"/>
Manage Inventory <input checked="" type="checkbox"/>	Distributor Compliance <input type="checkbox"/>	Shipments <input checked="" type="checkbox"/>
Scanout <input checked="" type="checkbox"/>	Price Change Report <input type="checkbox"/>	Service PO <input checked="" type="checkbox"/>
Inventory Cycle Count <input checked="" type="checkbox"/>	Inventory Adjustment Report <input type="checkbox"/>	Add Item <input checked="" type="checkbox"/>
Inventory Physical Count Worksheet <input checked="" type="checkbox"/>	Items Ordered Report <input checked="" type="checkbox"/>	Edit Item <input checked="" type="checkbox"/>
Inventory Transfer <input type="checkbox"/>	Top Vendors Report <input type="checkbox"/>	Kit Template <input type="checkbox"/>
Add Item <input type="checkbox"/>	Contract Compliance Report <input type="checkbox"/>	Scan Out Template <input type="checkbox"/>
Edit Item <input type="checkbox"/>	Price Discrepancy Report <input type="checkbox"/>	Medline Consignment Count <input type="checkbox"/>
Delete Item <input type="checkbox"/>	Item Expiring Report <input type="checkbox"/>	
Scan In <input checked="" type="checkbox"/>	Case Costing Report <input type="checkbox"/>	
Update Medline Item <input type="checkbox"/>	PO History Report <input type="checkbox"/>	
	Purchase Order Log <input type="checkbox"/>	
	Implant Log <input type="checkbox"/>	
	Real Time Inventory Report <input type="checkbox"/>	
	Purchase Report <input type="checkbox"/>	
	Spend Per Vendor Report <input type="checkbox"/>	
	Items Below Par Level Report <input type="checkbox"/>	
	Backordered Or Rejected Items Report <input type="checkbox"/>	
	Items Invoice Status Report <input type="checkbox"/>	
	Items Received Report <input type="checkbox"/>	
	PO Receive Status Report <input type="checkbox"/>	
	Invoice Status Report <input type="checkbox"/>	
	Scanned Out Items Report <input type="checkbox"/>	
	Freehand Items Report <input type="checkbox"/>	
	Project Report <input type="checkbox"/>	
	Standard Billing Report <input type="checkbox"/>	
	Comprehensive Inventory Transaction report <input type="checkbox"/>	
	Usage report <input type="checkbox"/>	



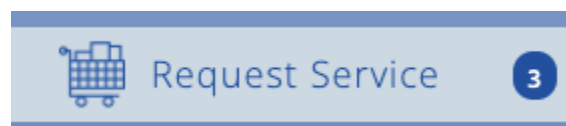
Purchase Orders

Creating a P.O.

1. Click onto “[Shop](#)”
2. Confirm that you are shopping for the correct facility
3. Begin searching for the desired vendor
4. Use the search field to add items into your cart
5. Once all of items are in your cart you can proceed to “[Generate PO](#)”

Creating a Service P.O.’s

1. Click into “[Request Service](#)”



2. Click the “[Vendors](#)” button and select the desired vendor
3. Begin searching for the item in the “[Add Service](#)” search field.

A screenshot of a web application's 'ADD SERVICE' search field. The search bar contains the text 'cdw'. Below the search bar, two search results are displayed. The first result is 'CDW SHIPPING COST \$51.09' with a list price of '\$51.09 / OTHER' and a quantity of '1'. The second result is 'CDW SHIPPING COST \$83.65' with a list price of '\$83.65 / OTHER' and a quantity of '1'. To the right of the search results is a 'Request Service' button. Below the search results, there is a 'Total Price' section and a checkbox labeled 'Use my PO #'.

ADD SERVICE:	cdw
CDW SHIPPING COST \$51.09	
CDW	
CDW51.09	LIST PRICE: \$51.09 / OTHER
N/A	- 1 +
CDW SHIPPING COST \$83.65	
CDW	
CDW83.65	LIST PRICE: \$83.65 / OTHER
N/A	- 1 +

Request Service

Total Price

Use my PO #



4. If the item is not there, then you can click the mini caret next to the search field to "Add New Service"

A screenshot of a web application interface. At the top left, the text 'ADD SERVICE:' is in blue. To its right is a white search input field with the placeholder text 'Search item'. To the right of the search field is a small barcode icon and a grey square button with a white downward-pointing triangle (a mini caret). Below the search field, a dropdown menu is open, showing two options: 'Add New Service' in a blue bar with white text, and 'Refresh' in a white bar with grey text.

5. From there you'd insert the following into the window:
 - Description Name
 - SKU #
 - The UOM is typically "EA"
 - Duration: Is set for one time if that is the frequency
 - Price '
6. Once you've added all of the items needed within the PO, you can click "**Request Service**" then the a window for generating a PO will appear and from that window choose "**Print PO**" followed by clicking "**Generate PO**". At this point you'd be able to get the PO number to send to AP

A screenshot of a web application dialog box titled 'Generate Service PO'. The dialog has a close button (an 'X' icon) in the top right corner. Inside the dialog, there are two radio buttons: 'Send PO PDF to vendor email id' and 'Print PO'. The 'Print PO' option is selected, indicated by a blue dot. Below the radio buttons, there is a line of text: 'After approval you would get an email of PO, that you can print and send to vendor.' At the bottom right of the dialog, there are two buttons: a blue 'Generate PO' button and a white 'Cancel' button with a grey border.

Receive Only P.O.s

6. Click onto “ **Shop**”
7. Confirm that you are shopping for the correct facility
8. Begin searching for the desired vendor
9. Use the search field to add items into your cart
10. Once all of the items have been added, click the “**Receive Only**” checkbox

☒ Receive Only

11. Proceed to “**Generate PO**”



Fixing Unapproved/ Stuck P.O.'s

1. Sometimes some P.O.'s can get in a “stuck” state due to the following reasons:
 - a. The person who submitted the P.O. is not placed in the facility's approval workflow
 - b. The person is not set for the correct department in the approval workflow and it needs to be updated
 - c. There may not be anyone in the same department and in each level to approve that person's P.O.
2. Once this has been resolved, the should go into the next process immediately.

To avoid any stuck PO's refer to [User Approval Workflow](#)

Items

New Item Adds

Regular

3. Click on to the “[Admin](#)” tab and choose the “[Items Catalog](#)” button



Admin

Organization
Application Settings
Application Settings Audit Log
Budget Transactions

Users

Facilities

Departments

Manufacturers

GL Code

Account Receivable Code

Payor Code

Care Type

Patterns

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Hybrent Apis

Vendor

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Vendors Account Setup

Inventory

Items Catalog

Link Items

Item Master

Inventory Transactions

Print Barcodes/QRcodes

Items Change Log

Stock Adjustment Notes

Item Categories

UOU Management

Import Vendor Bill Only Items

Inventory QOH Upload

Import Inventories

Cycle Count

Update Medline Item Price

4. Click on the caret dropdown and select “**Add Item**” button

Add Item

Add Link Item

Map Facility Items

5. Enter in the following fields while in the “**Item Detail**” tab: Description, Mfr Number, Categories, GL Code, Consumption Type



Item Detail
Vendors

Description*
Hydrogen Peroxide High-Level Disinfectant Revital-Ox® RESERT® RTU Liquid 4 Liter Container Max

Alias

Mfr Number*
788959_EA

Manufacturer*
Dental and Medical Supplie

Notes

Lot # Tracking
No

Expiration Tracking
No

Serial # Tracking
No

Qty in Stock
0

Active
Active

Implant
No

GL Code
Cost of Goods Sold -PC : Supplies & Other Clinical Costs : Clinical Supplies : Clinical Supplies

Categories
Clinical Supplies

CPT Code

HSPC Code

Ordering Type*
General

Is Consumable
Yes

Item Type
Inventory

GTIN

Ar Code
select

Is Billable
Yes

Consumption Type*
Piece

Bin Location

6. Click into the “**Vendors**” tab and click “**Add Vendor**” button

Add Vendor

7. Enter in the following fields while in the “**Vendors**” tab: Vendor Name, SKU, UOM, Qty in UOM, Qty in each

Is Active	Vendor Name *	SKU *	UOM *	Qty in UOM *	Qty in each *	Min Order Qty.	
<input checked="" type="checkbox"/>	Dental and▼	788959_E	CS ▼	1 Each	1 Piece ▼	0	▼

Manage custom UOU

8. Click the “**Save**” button and a popup will appear asking if you would like to map the prices to other facilities. Select “**Yes**” button



Save

9. Click on the “**More Options**” dropdown and select “**Map with all facility**” button

More Options ▼

Map with all facility

Change for mapped facilities

10. Enter the Purchase Price and click the “**Map All**” button

Map with all facilities

Purchase Price

98.16

Patient Price

Stock Status

N/A

Discount type

No Discount

Max order qty.

Max monthly order qty.

Min order qty.

0

Map All

Cancel

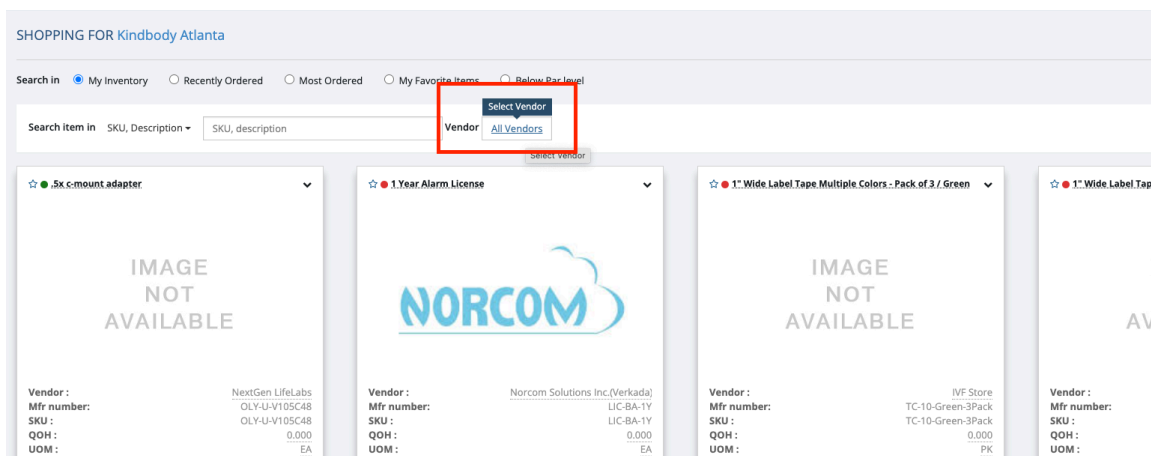


Punchout

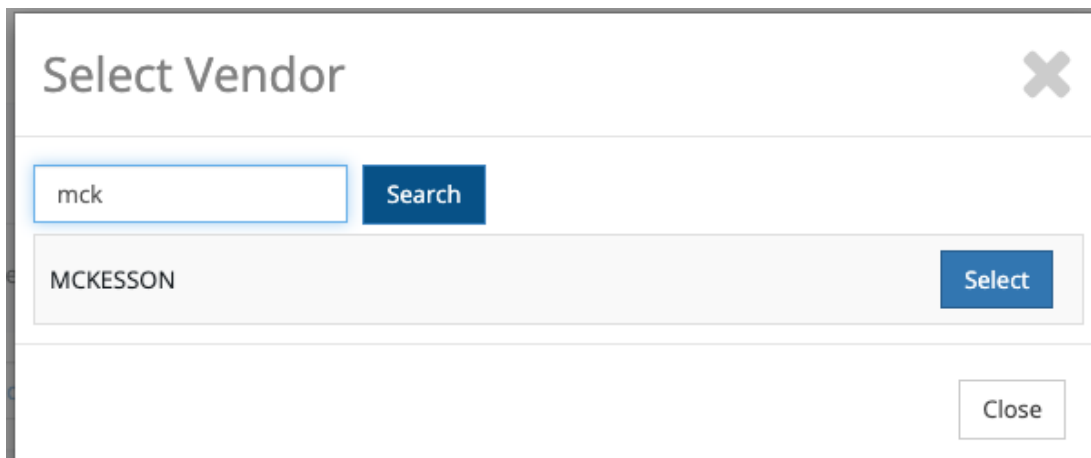
1. Click on to the “**Shop**” tab and choose the location you would like to add the item to



2. Click the “**All Vendors**” button and select the desired vendor.



3. Once you have selected the vendor , it will take you back to the original screen. There you would click the “**Search on Vendor Site**” button and it will redirect the screen





4. While you are on the vendor site you can search for the product and add it to the cart

McKESSON Search All Products

Home Products Orders Lists Support Resources Hello Punchout User #70563918 KBI SERVICES DBA KINDBODY

Working Cart

Account #58412104 KBI SERVICES INC
120 5TH AVE FL 5
NEW YORK, NY 10011-5638

Ship To #70563918 KBI SERVICES DBA KINDBODY
3005 PEACHTREE RD NE STE 100
ATLANTA, GA 30305-2214

0 items total \$0.00

1145301 Qty ☐ Quick Add Sort Recent Cart

Item #	Description	Manufacturer	Mfr #	UOM	Price	Qty	Total	Save	Delete/Edit
There are no items in your cart									

Customers like you regularly use these products

Add Item #1145301 MAGNESIUM SULFATE, SYR 50% 4MEQ/ML 10ML D/S

Ships directly from the manufacturer. Additional shipping charges may apply.

HEALTHFIRST #1000390


Quantity

UOM EA/1 \$40.73

Comment Comments are not seen by drivers, customer service or at the warehouse.

Notice - This item is not returnable

Image **Specifications** **Features**



Cart entry

Keying in
Within the 10 min
we'll attempt to
add the item to the
cart.

Detailed item
When the 'Q' item
is added to the cart,
the item will be
added to the cart.

5. Once you have all of the items needed within your cart, you can proceed to Punch Out. Your screen will be redirected with the items and its information preloaded into Hybrent



Cart #126471688 - PUNCHOUT CART

[Contact Your Account Manager](#)

Account #58412104 KBI SERVICES INC
120 5TH AVE FL 5
NEW YORK, NY 10011-5638

Ship To #70563918 KBI SERVICES DBA KINDBODY
3005 PEACHTREE RD NE STE 100
ATLANTA, GA 30305-2214

1 item totals \$40.73

All Items (1)		Drop-Ship (1)	Reorder Guide				Help	Print			
#	<input type="text"/>	Qty	ADD ITEM	<input type="checkbox"/> Quick Add	Sort	<div>Recent</div>	Cart	DELETE	SUSPEND	PUNCHOUT	More Options...
Item #	Description		Manufacturer	Mfr #	UOM	Price	Qty	Total	Save	Delete/Edit	
1145301	MAGNESIUM SULFATE, SYR 50% 4MEQ/ML 10ML D/S		HEALTHFIRST	1000390	EA/1	\$40.73	1	\$40.73			EDIT
Ships directly from the manufacturer. Additional shipping charges may apply.											

Notice - This item is not returnable



Your punch-out process completed, all checked out items added to your Hybrent Cart.

Redirecting to Hybrent Cart!

If does not redirect automatically within 10 seconds, please close this tab and go back to Hybrent Cart and refresh it to place order.

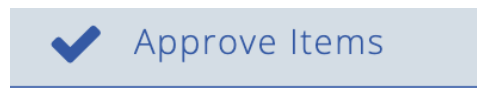
Bulk Items

- For Bulk Item Adds, the Hybrent Team adds this in for Kindbody
 - Contact: **Emma Knox**
 - E-mail: emma@hybrent.com
 - This can take the Hybrent team apprx ~ **1wk**
- Currently KB and Hybrent team are using the [Item Master](#) as a template
- Once completed, you can send a file to Emma of the items needed to be added



Item Approval

1. Click onto the “**Approve Items**” tab to see the list of items needing to be approved



2. Click the “**Approve**” button next to the item

Item Name ^	Vendor ^	SKU ^	UOM ^	Price ^	
RECYCLING FEE 15" TO LESS THAN 35"	CDW	654810	EA	\$5.00	Approve

3. Enter in the following fields while in the “**Item Detail**” tab: Description, Mfr Number, Categories, GL Code, Consumption Type

Item Detail Vendors

Description* RECYCLING FEE 15" TO LESS THAN 35"

Alias

Mfr Number* 654810 Manufacturer* CDW ...

Notes

Lot # Tracking No

Expiration Tracking No

Serial # Tracking No

Qty in Stock 0 Active Active

Implant No

GL Code Computers and IT Equipment : Computers & IT Eq - Cost

Categories Non-Clinical Equipment- IT

CPT Code

HSPC Code

Ordering Type* General

Is Consumable Yes

Item Type Inventory

GTIN

Ar Code select

Is Billable No

Consumption Type* Piece

Bin Location



- Click the “**Save**” button the item has now been approved

Backordered Items

If you are unsure on how to distinguish if an item is Backordered you can consider the following:

- For Manual Items:
 - Possibly have to contact the vendor for confirmation If the status of the items appears as “N/A”, contacting the vendor’s representative for further confirmation would be recommended
- For Punchout items:
- When you go into "Shop" and search for the item the “Status” will let you know
- When you proceed with an item in a cart it'll show a red font for the Backordered

CART FOR Kindbody Atlanta

ADD ITEM: [Generate PO](#)

Department: Clinical

Generate for: [All Vendors](#)

#	SKU	QOH	QTY	UOM	Stock Status	Price	Total Price
<div>▼ MCKESSON</div> <div><input type="checkbox"/> High Priority <input type="checkbox"/> Receive Only <input type="checkbox"/> Use my PO # Special Instructions</div>							
1.	🔍 🔍 🔍 🔍 SPONGE, UNIV N/S 2X2.4PLY L.F (200/PK 40PK/CS) 481051	0.000	<div><div>1</div></div>	CS	N/A	\$132.44	\$132.44
2.	🔍 🔍 🔍 🔍 Collection Set, Bld Safety Luer Adpt 23px3/4" (50/bx) 222269	0.000	<div><div>1</div></div>	BX	Back Ordered	\$63.30	\$63.30
3.	🔍 🔍 🔍 🔍 STARTER KIT, HEMOGLOBIN AIMSTRIP 1081649	0.000	<div><div>1</div></div>	EA	N/A	\$315.00	\$315.00
4.	🔍 🔍 🔍 🔍 CANNULA, NASAL GAS SAMP 7" O2/CO2 FML ADLT (25/CS) 999490	0.000	<div><div>2</div></div>	CS	N/A	\$55.46	\$110.92
5.	🔍 🔍 🔍 🔍 TOWEL, PROF 3PLY WHIT 13X18 (500/CS) 682700	0.000	<div><div>1</div></div>	CS	N/A	\$12.71	\$12.71
6.	🔍 🔍 🔍 🔍 Vein Lite, Ems Pro 743046	0.000	<div><div>1</div></div>	EA	N/A	\$496.12	\$496.12



SHOPPING FOR [Kindbody Atlanta](#)

Search in ☒ My Inventory ☐ Recently Ordered ☐ Most Ordered ☐ My Favorite Items

Search item in SKU, Description ▼ Vendor

☆ [Collection Set, Bld Safety Luer Adpt 23gx3/4" \(50/bx\)](#) ▼

IMAGE NOT AVAILABLE

Vendor : MCKESSON
Mfr number: 367283
SKU : 222269
QOH : 0.000
UOM : BX
Status : **Back Ordered**
Price : \$69.50

- 1 +

Mapping Facility/ Update Prices

1. Click on to the “[Admin](#)” tab and choose the “[Items Catalog](#)” button



2. Search for the desired item followed by selecting the “**Map Facility/ Update Price**” button
3. Click on the “**More Options**” dropdown and select “**Map with all facility**” button
4. Enter the Purchase Price and click the “**Map All**” button

Map Facility Items With Other Facilities

1. Click on to the “**Admin**” tab and choose the “**Utilities**” button
2. Click “**Go**” under “**Sync/Map items from one facility to other facilities.**”
3. Select the “From Facility” and the “To Facility” and click “**Map**”

Adding An Image to an Item

1. Click on to the “**Admin**” tab and choose the “**Items Catalog**” button

Admin	Vendor
Organization	Vendors
Application Settings	Vendors Account Setup
Application Settings Audit Log	Inventory
Budget Transactions	Items Catalog
Users	Link Items
Facilities	Item Master
Departments	Inventory Transactions
Manufacturers	Print Barcodes/QRCodes
GL Code	Items Change Log
Account Receivable Code	Stock Adjustment Notes
Payor Code	Item Categories
Care Type	UOU Management
Patterns	Import Vendor Bill Only Items
PO Special Instructions	Inventory QOH Upload
Invoice Payment Terms	Import Inventories
Approval Flow	Cycle Count
News	Update Medline Item Price
Utilities	
Identity Provider	
Backjob List	
System Tool	
Integration	
Hybrent Apis	



2. Search for the desired item followed by selecting the “[Edit Item](#)” button

Edit Item

3. Click on to the “[Vendors](#)” tab followed by the the caret next to the item and choose “[Manage Images](#)”.

Item Detail **Vendors**

Add Vendor

Is Active	Vendor Name *	SKU *	UOM *	Qty in UOM *	Qty in each *	Min Order Qty.
<input checked="" type="checkbox"/>	MCKESSON▼	440343	CS ▼	200l Each	1 Piece ▼ Manage custom UOU	0

Add Quick Code

Add Cross Walk Id

Manage Images

UPC Code

Barcode

Alternate Barcode

4. You can select the file you which to upload and once it loads, You successfully imported.

Manage Images for 440343

	<div>Choose File No file chosen</div>	<div>Remove</div>
IMAGE NOT AVAILABLE	<div>Choose File No file chosen</div>	<div>Remove</div>



FAQ's

- **“ I am trying to purchase these items from the vendor and I am getting a mapped error. How do I fix this?”**
 - Use the [Vendors Account Number file](#) for reference when mapping.
 - In the “ [Vendors Account Setup](#)” tab search for the vendor and facility name that the user is experiencing issues with and enter the Account Number. Click “[Save](#)”
- **“This item is no longer available with this vendor, can you please remove from Hybrent?”**
 - Search for the item and instead of deleting it, just set it to inactive within the “[Edit Item](#)” button.
- **“None of Hybrent items are showing in the newest facility that was added, can you add those items for that site?”**
 - You can go into the “ [Items Catalog](#)” and click the caret dropdown and select “[Map Facility Items](#)” and chose the facility you'd like to map
- **“ I need to create a Service PO for a service that will be done to our lab. However, they are not on the vendor list yet. How do I get them added?”**
 - Use the Hybrent Form to submit a [Add Supplier Ticket](#)