

kindbody

Hybrent SOP

Credentials	2
Signing In	2
Facility	2
New Vendor Adds	2
Vendor Account SetUp	3
New Facility Setup	3
Import Bulk (Facilities, Dept, User, Patient)	5
New Department Setup	6
New Facility Approval Workflow Setup	8
Users	11
User Approval Workflow	11
User Adds	13
User Facility Access	17
Purchase Orders	20
Creating a P.O.	20
Creating a Service P.O.'s	20
Receive Only P.O.s	22
Fixing Unapproved/ Stuck P.O.'s	22
Items	23
New Item Adds	23
Regular	23
Punchout	26
Bulk Items	29
Item Approval	30
Backordered Items	31
Mapping Facility/ Update Prices	32
Map Facility Items With Other Facilities	33
Adding An Image to an Item	33
FAQ's	34

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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

View workflow

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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

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 apprx ~ **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](#)

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- 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 [Jennifer Setyanto](#) . Jennifer 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

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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	

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

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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

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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. 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



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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/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	

6. Click the “**Add**” button



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**

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- 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



New Facility Approval Workflow Setup

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

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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/QR Codes
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 x

Vendors*

All Vendors ▼

Click the “**Save**” button

Save

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

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Name

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(1 Facilities)

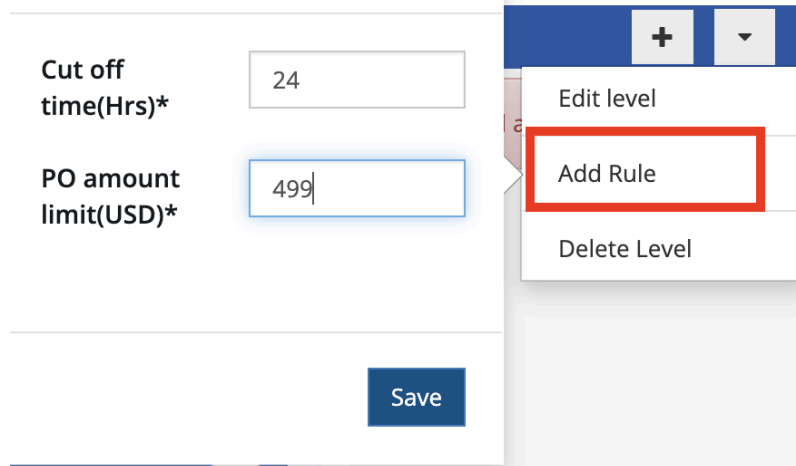
[Manage flow](#)

[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**
















The screenshot shows a form with two input fields: 'Cut off time(Hrs)*' with the value '24' and 'PO amount limit(USD)*' with the value '499'. Below these fields is a 'Save' button. To the right, a dropdown menu is open, showing three options: 'Edit level', 'Add Rule' (which is highlighted with a red box), and 'Delete Level'.

- 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

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- **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>Amanda McKeen</div> <div> N/A amanda.mckeen@kindbody.com</div> <div>Kindbody HQ Engineering/Tech Main Supply</div>	<div>Richie Altmanshofer</div> <div> N/A richie.altmanshofer@kindbody.com</div> <div>Kindbody HQ Corporate Main Supply</div>	<div>Richard Forsythe</div> <div> N/A Richard.Forsythe@kindbody.com</div> <div>Kindbody Flatiron Engineering/Tech Main Supply</div>	<div>Sarah Kerin</div> <div> N/A sarah.kerin@kindbody.com</div> <div>Kindbody HQ Finance Main Supply</div>
<div>Emma Boockvar</div> <div> N/A emma.boockvar@kindbody.com</div> <div>Kindbody HQ Facilities/Construction Main Supply</div>	<div>Sam Yunker</div> <div> N/A sam.yunker@kindbody.com</div> <div>Kindbody HQ Engineering/Tech Main Supply</div>	<div>Heather Mendell</div> <div> N/A heather.dacorte@kindbody.com</div> <div>Kindbody Flatiron Facilities/Construction Main Supply</div>	
<div>Glen Smith</div> <div> N/A glen.smith@kindbody.com</div> <div>Kindbody HQ Facilities/Construction Main Supply</div>	<div>Brady Titus</div> <div> 4158457239 brady.titus@kindbody.com</div> <div>Kindbody Flatiron Facilities/Construction Main Supply</div>	<div>Jeannette Norris</div> <div> N/A jeannette.norris@kindbody.com</div> <div>Kindbody Flatiron Clinical Main Supply</div>	
	<div>Gregory Spires</div> <div> N/A gregory.spires@kindbody.com</div> <div>Kindbody Flatiron Facilities/Construction Main Supply</div>		
	<div>Tim Ebervein</div> <div> N/A tim.ebervein@kindbody.com</div> <div>Kindbody Flatiron Facilities/Construction Main Supply</div>		
	<div>Craig Gladstone</div> <div> N/A Craig.Gladstone@kindbody.com</div> <div>Kindbody DC Clinical Main Supply</div>		

Users

User Approval Workflow

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

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

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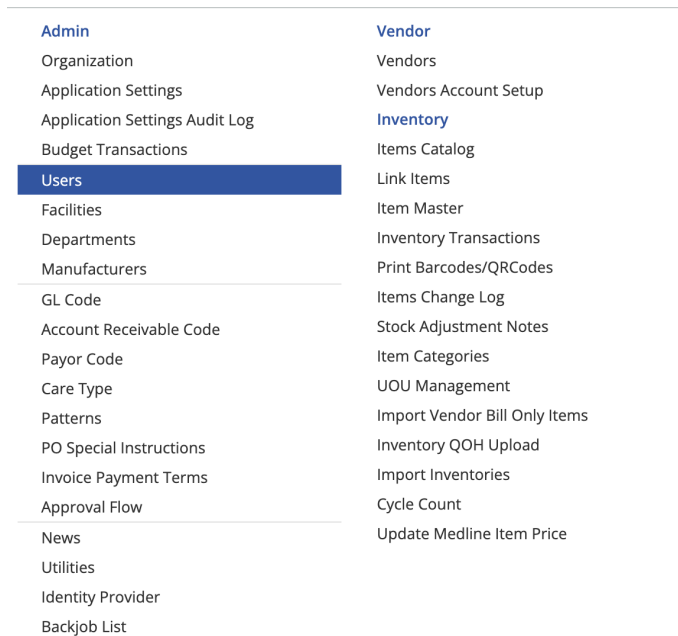
4. Enter the required fields and click the “**Save**” button



- 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



2. Click the “**Add**” button

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Add

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"/>				+
Department*	<input type="text" value="Engineering/Tech"/>				+
Inventory*	<input type="text" value="Main Supply"/>				+
Joining Date	<input type="text" value="01/16/2022"/>				
Status	<div>Active</div>				

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

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Add User



User

User Access

Item Catalog Access

PO Alerts

Vendor Access

Notification Access

'PMB" Pacific Magazine Billing, LP

120 Partners LLC

1260 Santa Monica Medical Plaza, LP

16 EAST 40 REALTY LLC

3005 Peachtree NE Owner LLC

333 Rentals LLC

3M Medical

4Imprint, INC.

618/314 Metro East Mobile Notary

A Joy Films LLC

A-Arrow Lock & Key Co.

A-LIGN Compliance and Security Inc

AAB PROFICIENCY TESTING SERVICE

Able Services

Absolute Pest Inc.

ABW Medical LLC

Accent

Accurate Document Destruction Inc.

Accurate Repro Inc

Acertitude

ACF Tech Consulting LLC

Active Wellness, LLC

Admiral Courier

ADP, Inc.

AdvaGenix International LLC

Advanced Environmental Services, Inc.

Advanced Resources

Advantage Business Equip.

Advocate Good Samaritan Hospital

Advocate Good Shepherd Hospital

Advocate IMMC Medical Staff Fund

Advocate Lutheran General Hospital

Aero-Med LTD

AeroMed Technologies

Aetna Felt Corp.

Affordable Signs & Lighting

AIRCLEAN SYSTEMS

AIRGAS USA

Alchemy Web Marketing

Alissa Alter

All County Electric Llc

Allan Industries Inc.

Allen Consulting Inc.

Alliant Insurance Services, Inc.

Alpha Cleaning Company

Alpha Graphics

ALSCO INC

Alternative Source Medical

Altorfer Industries, Inc.

AMAZON

Amber Lopez

Ambius

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

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[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**

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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
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	

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

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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.

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Vios Aurora		<input type="checkbox"/> 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"/>	
	PO Confirmation Notification <input checked="" type="checkbox"/>	

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Purchase Orders

Creating a P.O.

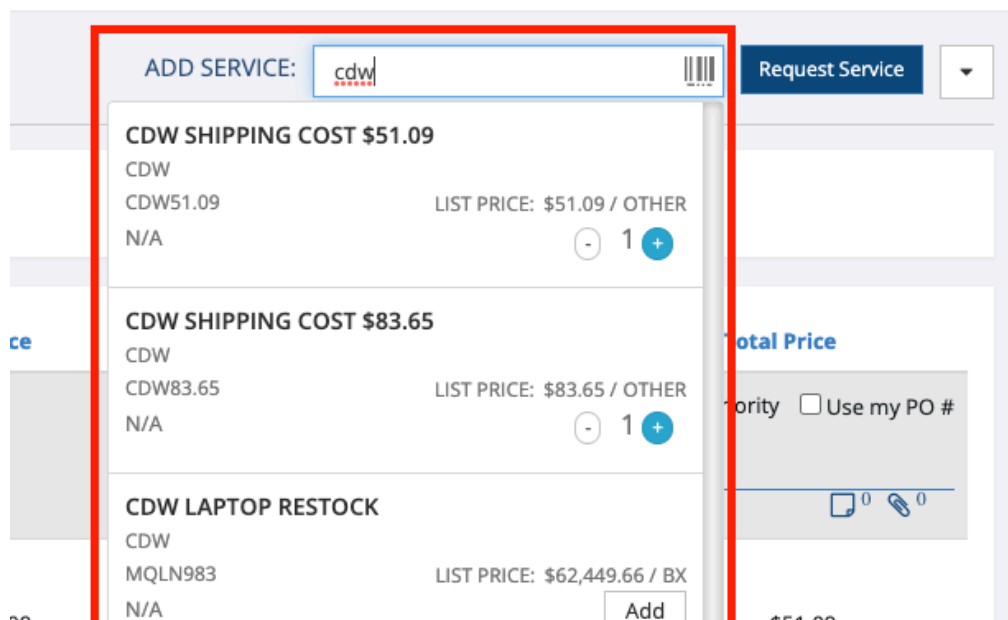
1. Click onto “[Shop](#)”
2. Confirm that you are shopping for the correct facility
3. Begin searching for the desired vendor
4. Use the search field to add items into your cart
5. Once all of items are in your cart you can proceed to “[Generate PO](#)”

Creating a Service P.O.’s

1. Click into “[Request Service](#)”



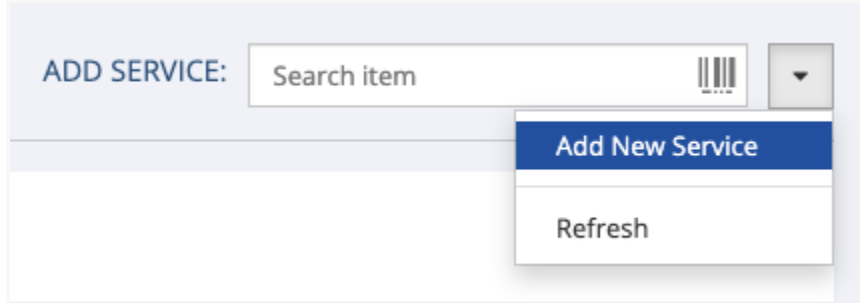
2. Click the “[Vendors](#)” button and select the desired vendor
3. Begin searching for the item in the “[Add Service](#)” search field.

A screenshot of a web application interface. At the top, there is a search bar labeled "ADD SERVICE:" with the text "cdw" entered. To the right of the search bar is a "Request Service" button. Below the search bar, a list of search results is displayed, enclosed in a red rectangular border. The results list contains three items: "CDW SHIPPING COST \$51.09", "CDW SHIPPING COST \$83.65", and "CDW LAPTOP RESTOCK". Each item has a "LIST PRICE" and a quantity selector (a minus button, a number "1", and a plus button). To the right of the results list, there is a "Total Price" section with a checkbox labeled "Use my PO #".

Item	Price	Quantity
CDW SHIPPING COST \$51.09	\$51.09 / OTHER	1
CDW SHIPPING COST \$83.65	\$83.65 / OTHER	1
CDW LAPTOP RESTOCK	\$62,449.66 / BX	1

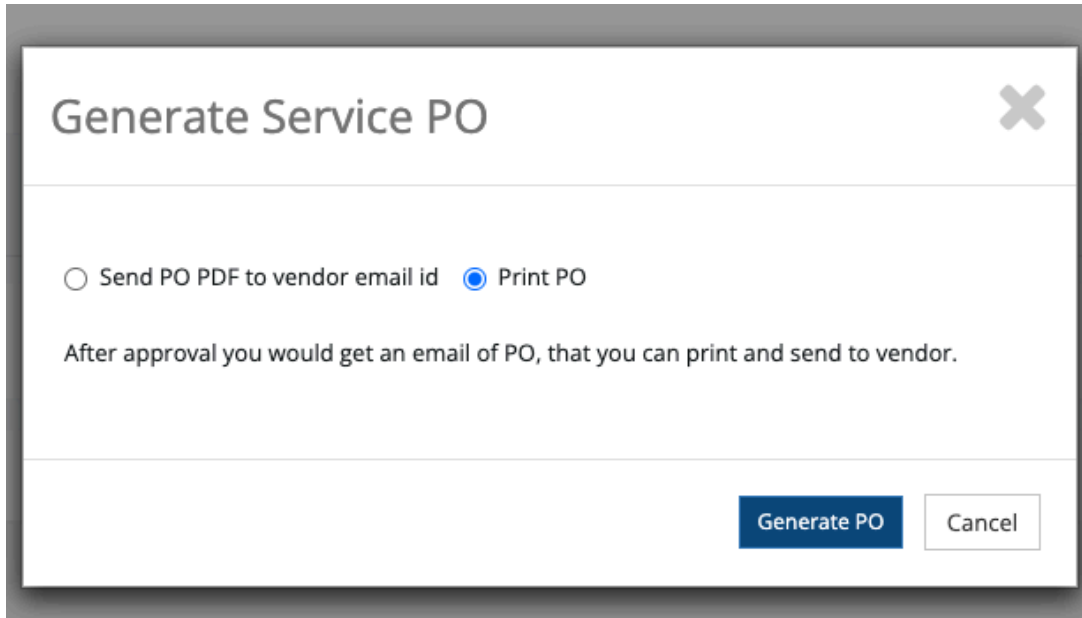
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4. If the item is not there, then you can click the mini caret next to the search field to "Add New Service"



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.

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Generate Service PO

☐ Send PO PDF to vendor email id ☒ Print PO

After approval you would get an email of PO, that you can print and send to vendor.

Generate PO Cancel

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

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- 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

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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	

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

kindbody

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

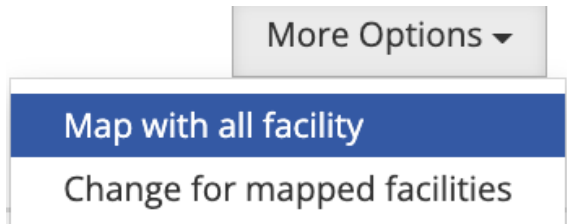
Manage custom UOU

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

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

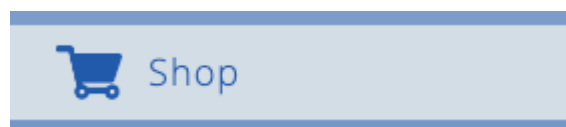


- Enter the Purchase Price and click the “**Map All**” button

A screenshot of a dialog box titled 'Map with all facilities' with a close button (X) in the top right corner. The dialog contains several input fields: 'Purchase Price' (with the value 98.14), 'Patient Price', 'Stock Status' (dropdown menu showing N/A), 'Discount type' (dropdown menu showing No Discount), 'Max order qty.', 'Max monthly order qty.', and 'Min order qty.' (with the value 0). At the bottom right, there are two buttons: 'Map All' (highlighted with a red box) and 'Cancel'.

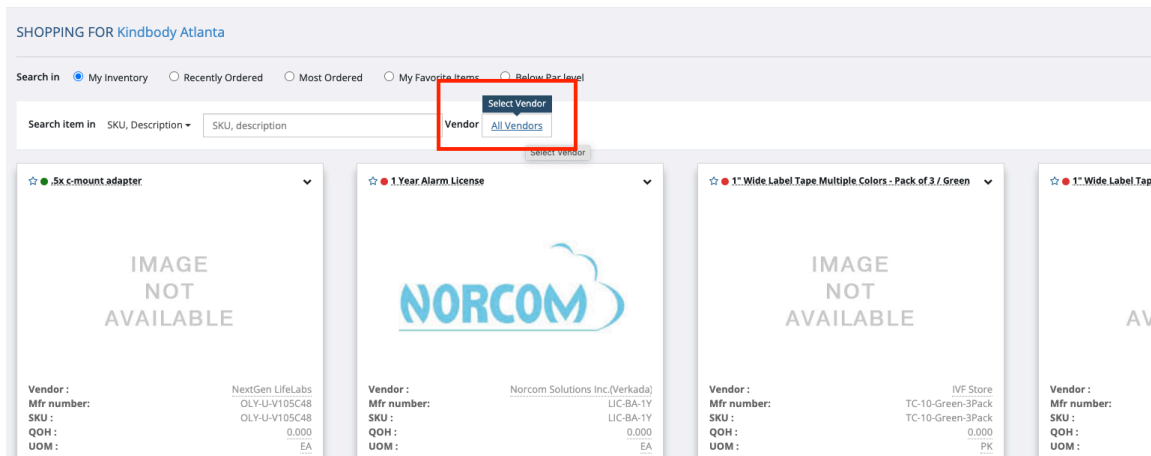
Punchout

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

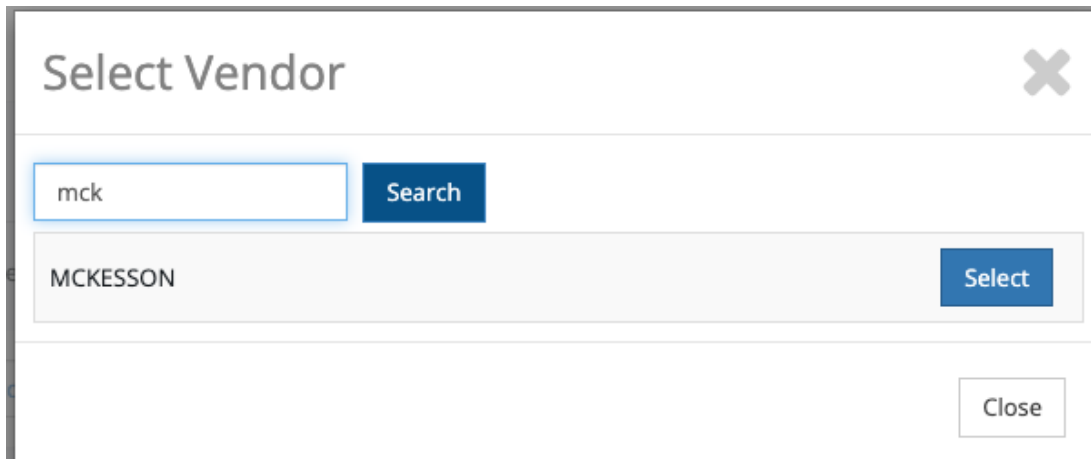


- Click the “**All Vendors**” button and select the desired vendor.

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- 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



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

kindbody

McKESSON

Search All Products

Q SEARCH

CART \$0.00 (0)

Home Products Orders Lists Support Resources

Hello Punchout User
#70563918 KBI SERVICES DBA KINDBODY

Working 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

0 items total \$0.00

All Items (0) Reorder Guide

Help Print

1145301Qty

ADD ITEM

☐ Quick Add

Sort Recent

Cart

DELETE

SUSPEND

PUNCHOUT

More Options...

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

Grifols Td Vaccin and Older

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



Go to Item Detail

ADD ITEM TO CART

CANCEL

- 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

kindbody

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](#)

#	Qty	ADD ITEM	<input type="checkbox"/> Quick Add	Sort Recent ▾	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

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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

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


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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><div><input type="checkbox"/> High Priority <input type="checkbox"/> Receive Only <input type="checkbox"/> Use my PO #</div><div>Special Instructions</div></div>							
1.	<div><div><div></div><div></div><div></div></div>SPONGE, UNIV.N/S,2X2.4PLY,LF,1000/PK,40PK/CS</div>	0.000	<div><div></div><div>1</div><div></div></div>	CS	N/A	\$132.44	\$132.44
2.	<div><div><div></div><div></div><div></div></div>Collection Set, Bld Safety Luer,Adpt,23px3/4", (50/bx)</div>	0.000	<div><div></div><div>1</div><div></div></div>	BX	Back Ordered	\$63.30	\$63.30
3.	<div><div><div></div><div></div><div></div></div>STARTER KIT, HEMOGLOBIN,AIMSTRIP</div>	0.000	<div><div></div><div>1</div><div></div></div>	EA	N/A	\$315.00	\$315.00
4.	<div><div><div></div><div></div><div></div></div>CANNULA, NASAL GAS SAMP, 7" O2/CO2 FML ADLT (25/CS)</div>	0.000	<div><div></div><div>2</div><div></div></div>	CS	N/A	\$55.46	\$110.92
5.	<div><div><div></div><div></div><div></div></div>TOWEL, PROF,3PLY,WHIT,13X18 (500/CS)</div>	0.000	<div><div></div><div>1</div><div></div></div>	CS	N/A	\$12.71	\$12.71
6.	<div><div><div></div><div></div><div></div></div>Vein Lite, Ems Pro</div>	0.000	<div><div></div><div></div><div></div></div>	EA	N/A	\$496.12	\$496.12

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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 :	BY
Status :	Back Ordered
Price :	\$65.50

- 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

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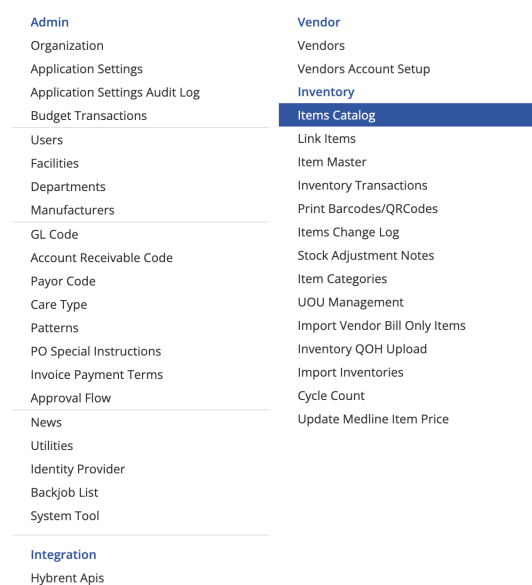
4. Enter the Purchase Price and click the “[Map All](#)” button

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



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





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

kindbody

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	200	Each	1	Piece	0	 
Manage custom UOU									

- 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

	<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Remove"/>
IMAGE NOT AVAILABLE	<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Remove"/>

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?”

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- 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](#)