

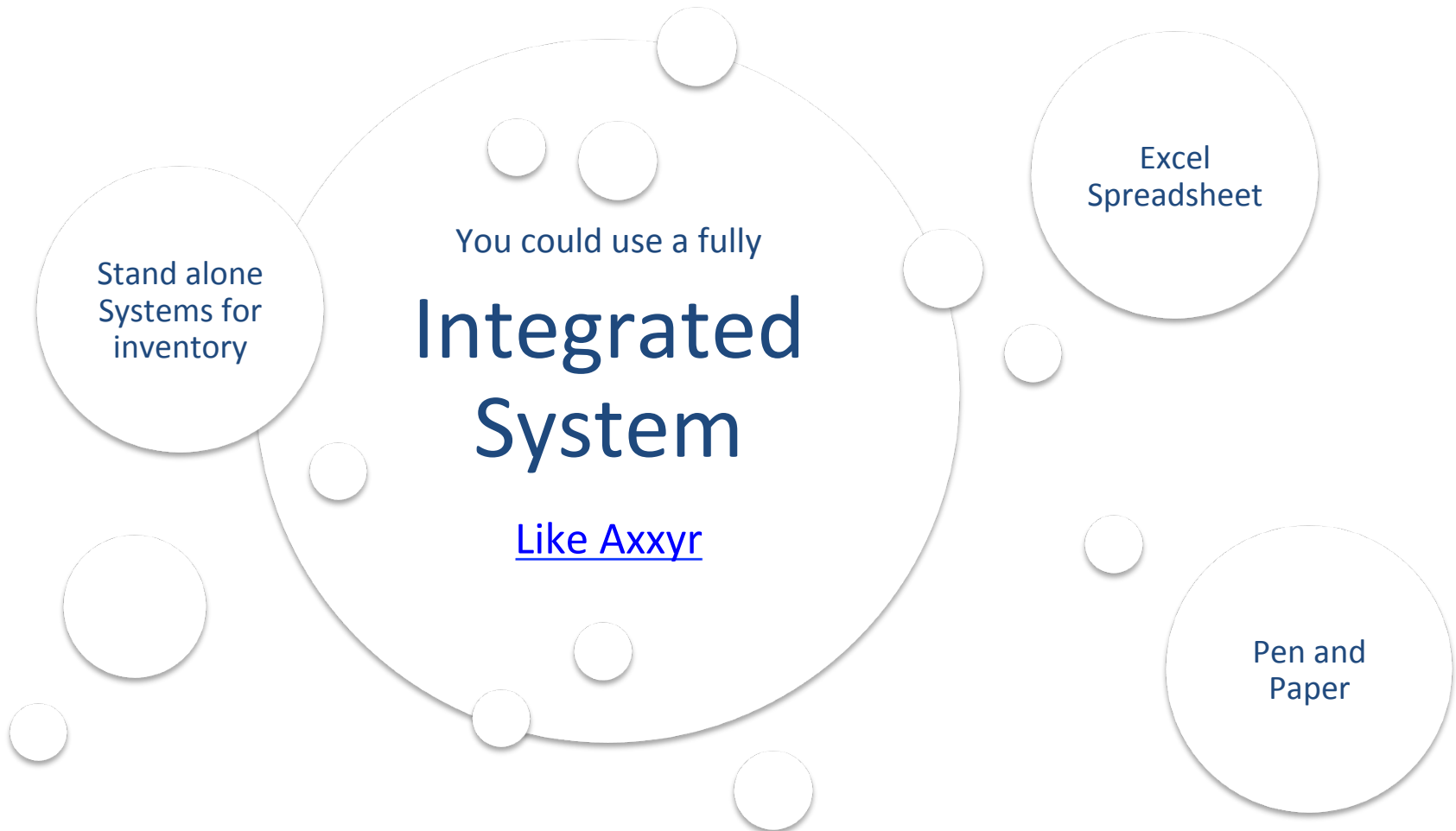
# Easy Inventory Setup

Using Excel



Axxyr Medical Systems Inc.

# Inexpensive Method to Manage Your Inventory



# Do It With Excel

Here is How Fast

F

- **Open Blank Excel**

A

- On first tab create columns for inventory

S

- On second tab create list of items and suppliers

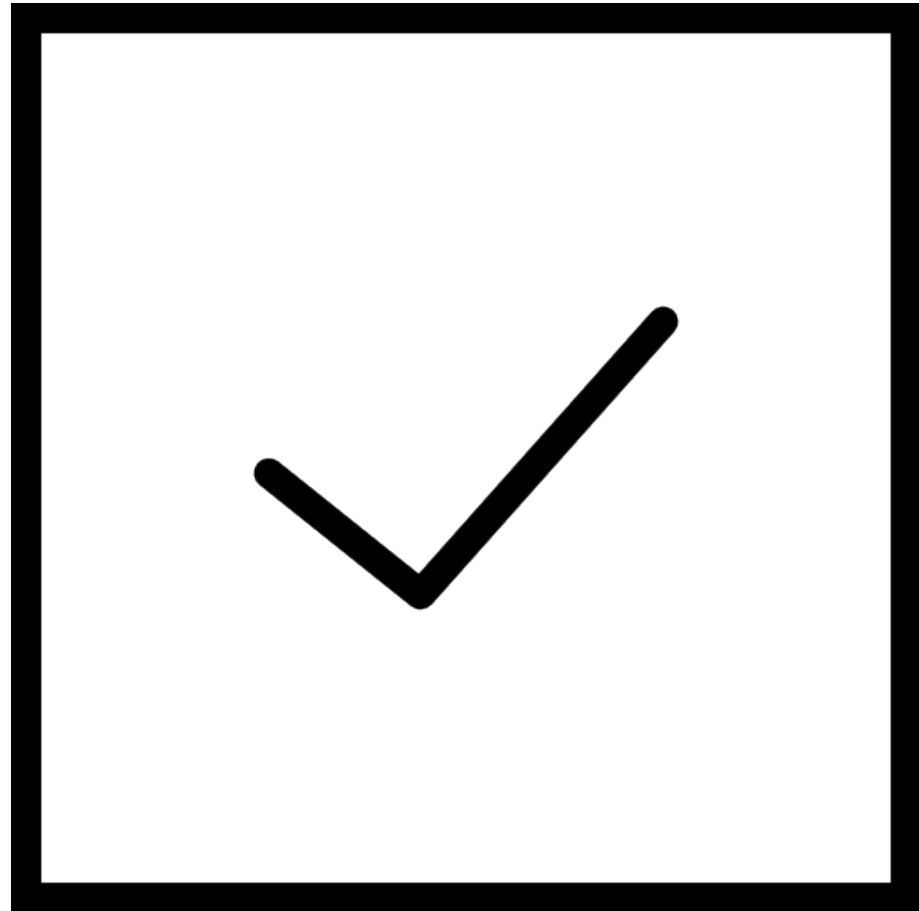
T

- Link the two sheets

# Now for the Screenshots

## Steps 1 to 9

Note that we assume some familiarity with Excel for this explanation.



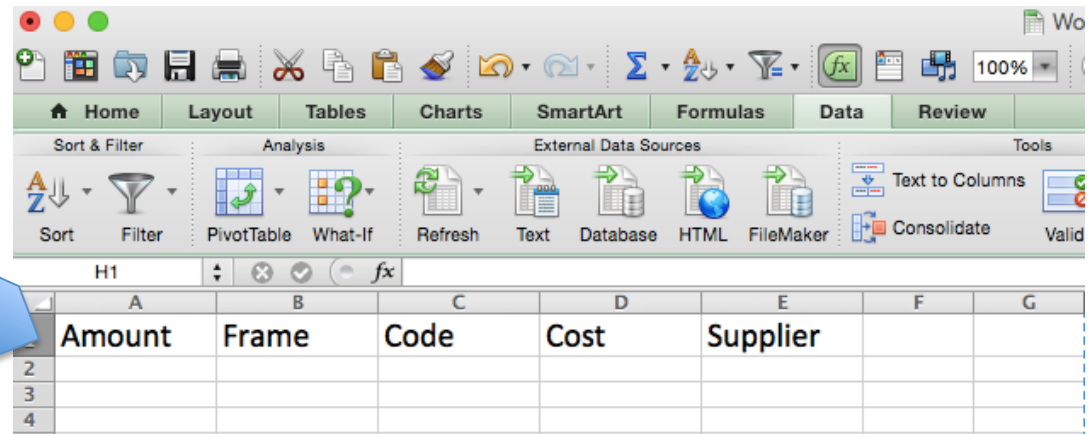
# Screenshots: 1

First open a blank Excel spreadsheet

Type in the headings that you would like to use for tracking inventory.

Change the name of sheet 1 to a name you would like such as “Inventory”

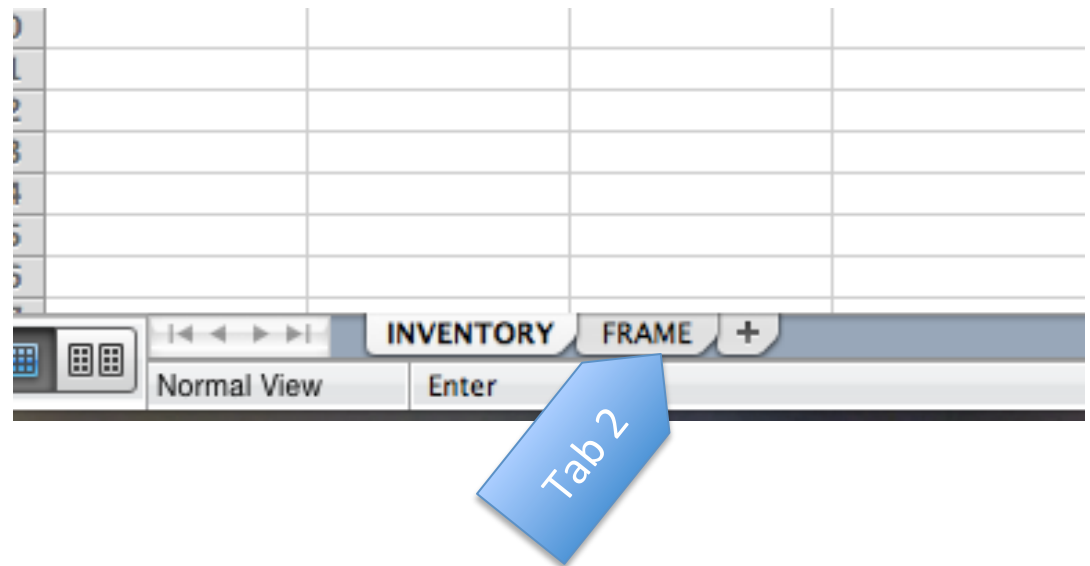
headings



# Screenshots: 2

Next click on the “+” sign at the bottom and rename the second page

We chose to call this tab “Frame” but you can call it anything



# Screenshots: 3

Click the new tab “Frame” and open

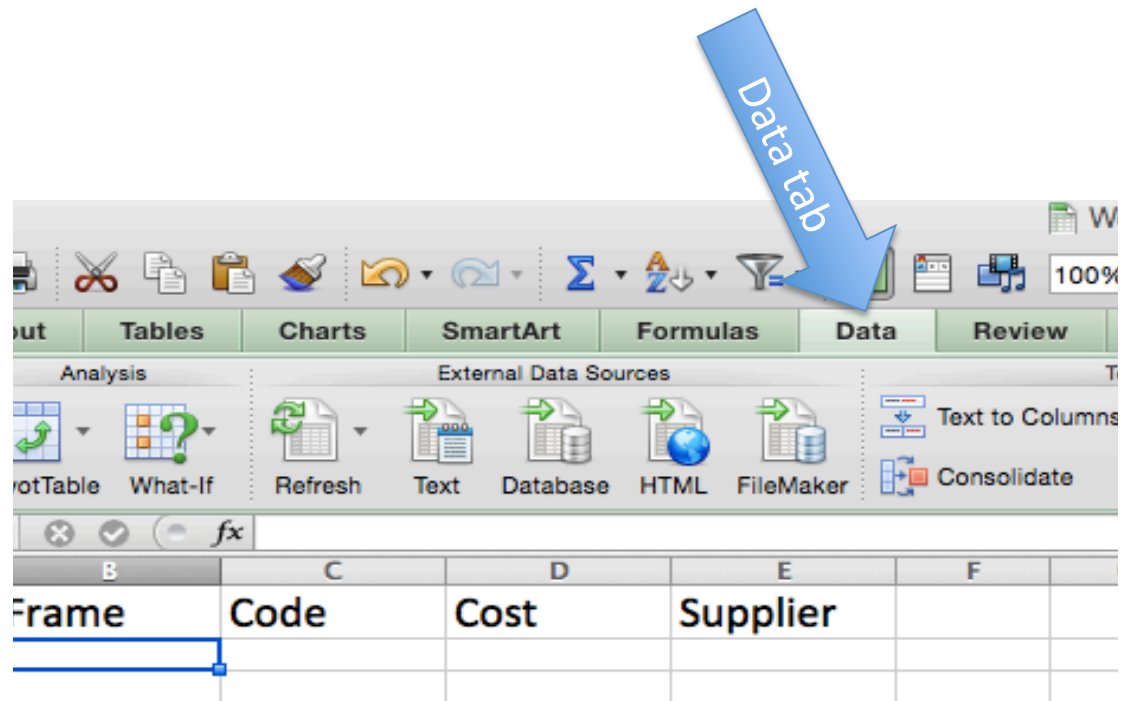
This is a blank sheet and we will create values. In this case we are creating the frame, code, cost and supplier and filling in some information.

	A	B	C	D
1	Frame	Code	Cost	supplier
2	Calvin Klein	CK0101	\$50	Kal Wholesale
3	Gucci	GU0001	\$200	Pat inc.
4	Gucci	GU0002	\$100	eyeglasses.com
5	Gucci	GU0003		
6	Gucci	GU0004		
7	Hugo Boss	HB0101		
8	Hugo Boss	HB0202		
9	Hugo Boss	HB0303		
10	Hugo Boss	HB0404		
11	Jimmy Choo	JC6748		
12	Kate Spade	KS0202		
13	Kate Spade	KS2345		
14	Kate Spade	KS3333		
15	Kate Spade	KS4556		
16	Nike	N00099		
17	Oakley	OX3102		
18	Oakley	OX3111		
19	Oakley	OX3125		
20	Oakley	OX5038		
21	Oakley	OX5038		
22	Polo	PO5454		
23	Polo	PO7676		
24	Polo	PO9898		
25	Polo	PO9999		
26	Ray Ban	RB2354		
27	Vera Wang	VW2345		

# Screenshots: 4

Now to link the two sheets

Go to the first sheet  
“Inventory” and  
select data tab on  
top







# Screenshots: 6

On the Same sheet “Inventory”

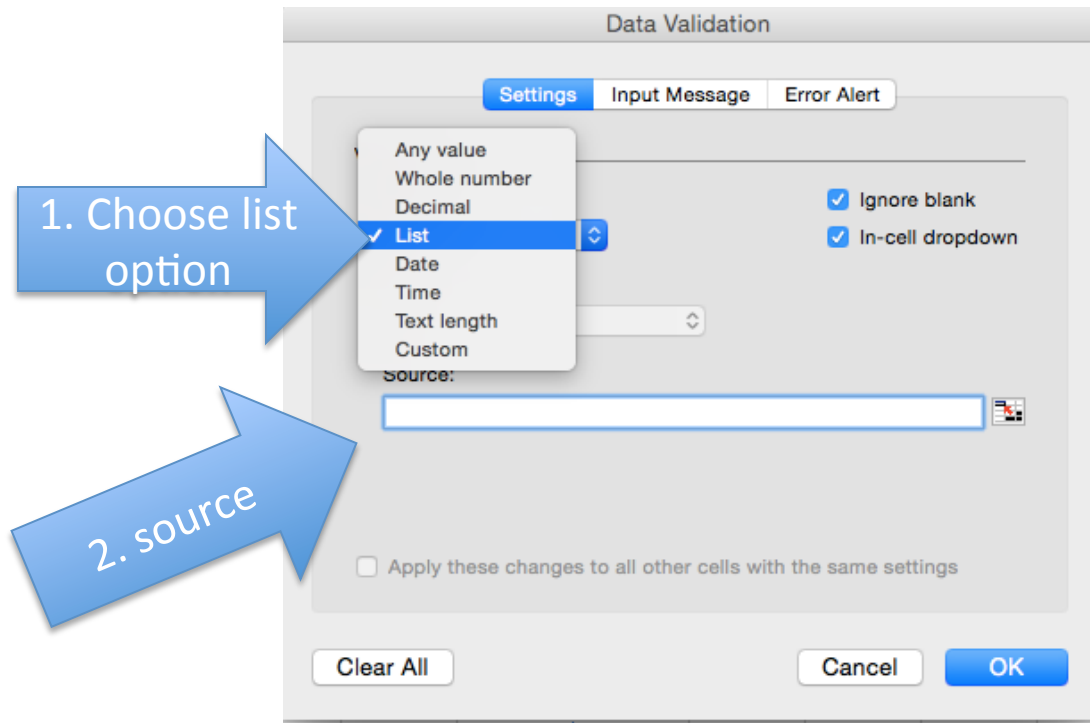
Click on “Validate”  
and choose  
“validate data”  
The pop up box  
appears....

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. A blue arrow points to the 'Validate' button in the 'Data Tools' group. The 'Data Validation' dialog box is open, displaying the 'Settings' tab. The 'Validation criteria' section is set to 'List', and the 'Source' is set to '=FRAME!\$A\$2:\$A\$27'. The 'Ignore blank' and 'In-cell dropdown' options are checked. The background spreadsheet shows an 'Inventory' table with the following data:

Frame	Code	Cost	supplier
Calvin Klein	CK0101	\$50	Kal Wholesale
Gucci	GU0001	\$200	Pat inc.
Gucci	GU0002	\$100	eyeglasses.com
Gucci	GU0003		
Gucci	GU0004		
Hugo Boss	HB0101		
Hugo Boss	HB0202		
Hugo Boss	HB0303		
Hugo Boss	HB0404		
Jimmy Choo	JC6748		
Kate Spade	KS0202		
Kate Spade	KS2345		
Kate Spade	KS3333		
Kate Spade	KS4556		
Nike	N00099		
Oakley	OX3102		
Oakley	OX3111		
Oakley	OX3125		
Oakley	OX5038		
Oakley	OX5038		
Polo	PO5454		
Polo	PO7676		
Polo	PO9898		
Polo	PO9999		
Ray Ban	RB2354		
Vera Wang	VW2345		

# Screenshots: 7

In the popup box select “list”



The cursor will then automatically go to the next box “source”

# Screenshots: 8

Almost done...

Click on Tab 2: "Frame" and highlight cells under "frame" Column A2:A27 on our sheet. The values will automatically fill out in the "source" box. Click OK. The first page "Inventory" is now back.

Workbook1

Search in Sheet

Home Layout Tables Charts SmartArt Formulas Data Review

Sort & Filter Analysis External Data Sources Tools Group & Outline

Sort Filter PivotTable What-If Refresh Text Database HTML FileMaker Validate Remove Duplicates Group Ungroup

A2

	A	B	C	D
1	Frame	Code	Cost	supplier
2	Calvin Klein	CK0101	\$50	Kal Wholesale
3	Gucci	GU0001	\$200	Pat inc.
4	Gucci	GU0002	\$100	eyeglasses.com
5	Gucci	GU0003		
6	Gucci	GU0004		
7	Hugo Boss	HB0101		
8	Hugo Boss	HB0202		
9	Hugo Boss	HB0303		
10	Hugo Boss	HB0404		
11	Jimmy Choo	JC6748		
12	Kate Spade	KS0202		
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17	Oakley	OX3102		
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21	Oakley	OX5038		
22	Polo	PO5454		
23	Polo	PO7676		
24	Polo	PO9898		
25	Polo	PO9999		
26	Ray Ban	RB2354		
27	Vera Wang	VW2345		

Data Validation

Settings Input Message Error Alert

Validation criteria

Allow: List  Ignore blank  In-cell dropdown

Data: between

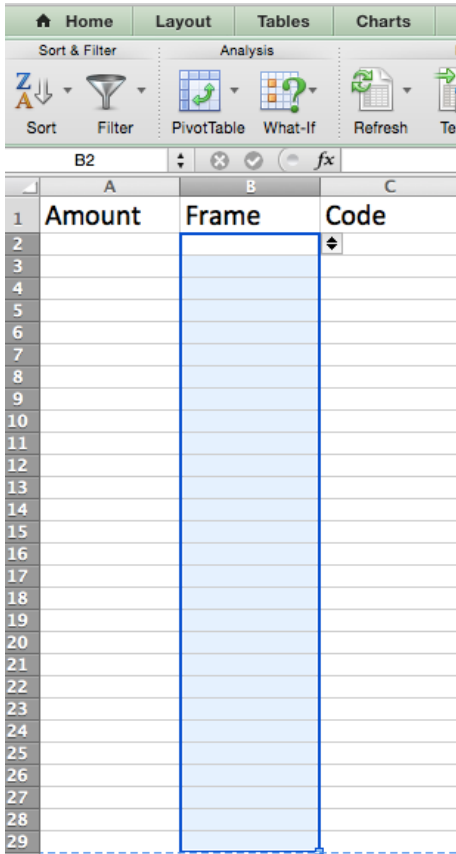
Source: =FRAME!\$A\$2:\$A\$27

Apply these changes to all other cells with the same settings

Clear All Cancel OK

# Screenshots: 9

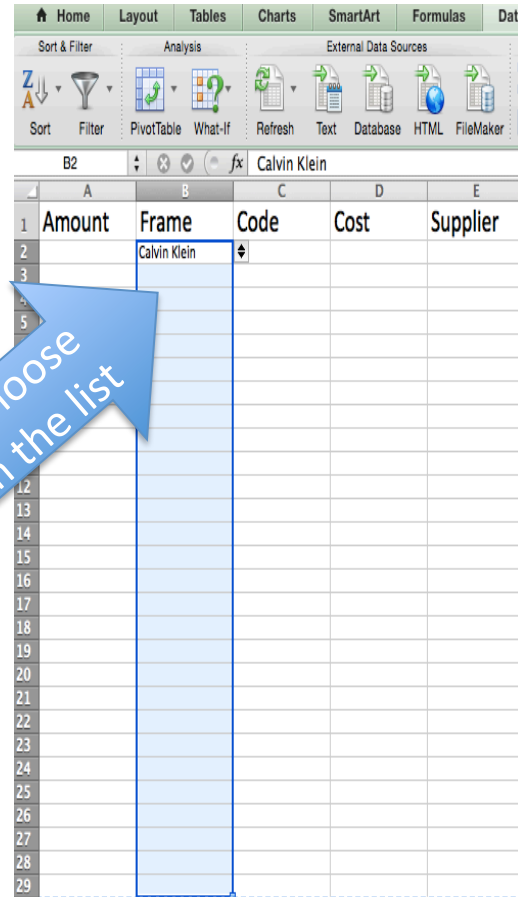
Ok Finished!



This screenshot shows the Excel ribbon with the 'Home' tab selected. The 'Sort & Filter' group is active, showing options for Sort, Filter, PivotTable, What-If, and Refresh. The spreadsheet below has three columns: 'Amount' in column A, 'Frame' in column B, and 'Code' in column C. Row 1 contains the headers. The 'Frame' column is highlighted in light blue, indicating it is selected.

	A	B	C
1	Amount	Frame	Code
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
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28			
29			

The rows under frame is now formatted to pick from a list

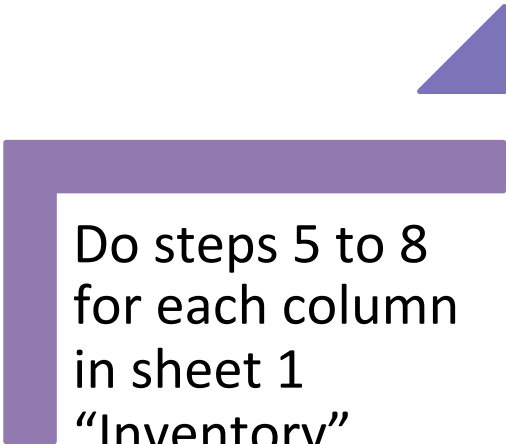


This screenshot shows the same spreadsheet as the previous one, but with a dropdown menu open in the 'Frame' column of row 2. The menu lists 'Calvin Klein' as the selected item. The ribbon is visible at the top, showing the 'Home' tab and various tool groups.

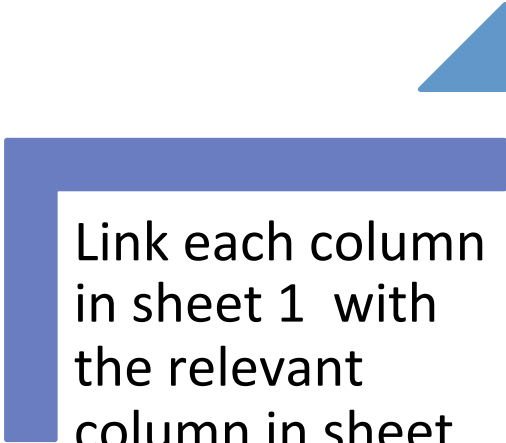
	A	B	C	D	E
1	Amount	Frame	Code	Cost	Supplier
2		Calvin Klein			
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
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29					

# Repeat

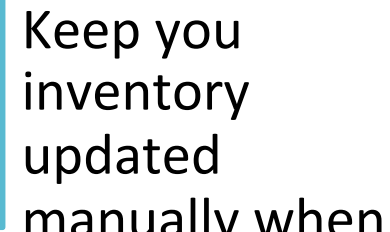
Follow steps 5 to 8



Do steps 5 to 8  
for each column  
in sheet 1  
“Inventory”



Link each column  
in sheet 1 with  
the relevant  
column in sheet  
2 “Form”



Keep you  
inventory  
updated  
manually when  
items are sold.

# When Inventory is too large

for the Future

- Using Excel in this manner is great for starting out and budget is tight.
- Once you are ready for a system that frees up your time and handles inventory, billing, dispensing, appointments and more seamlessly then email [Axxyr](mailto:info@axxyr.com) or call us at 416 855 6888.
- Let us help you get organized

# For More Information

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