Inventory control and ordering become manageable, consistent, and cost-effective when we:

(1) know what percentage of operating costs is made up of dental supplies.
(2) understand the current state of the practice’s ordering and inventory situation.
(3) integrate new logical and efficient ordering and inventory systems into the practice.
(4) utilize technological advancements to streamline ordering, manage inventory, and minimize errors.

This course will help dental team members identify the problems and complications that result from disorganized ordering and inventory practices, and introduce a new ordering and supply inventory protocol and system. With this knowledge, dental teams will be able to apply practical methods to create a structured and predictable approach to managing their inventory and supply ordering.

What do you feel are the biggest challenges for restructuring the inventory and ordering processes in your practice?

1. ____________________________
2. ____________________________
3. ____________________________
4. ____________________________
5. ____________________________

Learning & Practical Objectives

After completing this course and using this workbook, the attendee should be able to:

1. Explain the frequent problems many practices experience with inventory control and ordering.
2. Identify the changes necessary to implement a new inventory and ordering system.
3. Describe the tag system and the technologies and techniques related to it that can increase practice efficiency.
Inventory & Ordering Overview

What is Inventory Control?

**Definition of Inventory Control**

- Managing the supply, storage, and accessibility of items to ensure an adequate supply without excessive oversupply.
- Ideal inventory control maintains a steady expense level, since it is predicated on predictable supplies ordering on a regular basis.
- However, inventory control must also be flexible to account for changes, such as practice growth, utilization of new products, and staff transitions.

**Objective of Inventory Control**

- To maintain an appropriate level of necessary supplies and products so that consistently excellent levels of patient care and service can be delivered in a timely manner.

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**Many practices experience inventory inconsistencies because:**

- Multiple team members are authorized to order supplies.
- There is a lack of communication among team members in between placing orders.
- No protocol for inventory control or supplies ordering is in place.
- Excessive shipping costs accrue from frequent and/or last-minute rush orders.

**Practice Overhead Estimates**

Ideally, inventory should comprise between 6% and 12% of a practice's costs.
Inventory & Ordering Overview

The Costs of Oversupply and Undersupply

Dental inventory expenses include the purchase prices of the items; cost of personnel placing, tracking, and stocking the order; and carrying or storage costs. When these variables are not in the ideal balance (i.e., oversupply or undersupply), the total cost of dental inventory increases, diminishing profit margins, the potential for staff salary increases, and practice growth. Oversupply depletes cash, takes up storage space, and wastes materials when they expire prior to use. Undersupply, however, can potentially cost the practice much more. Without essential supplies, the practice may be unable to perform a procedure, resulting in lost patients and business, as well as the non-financial costs of on-going patient pain, untreated dental disease, and dissatisfied patients.

<table>
<thead>
<tr>
<th>Problems Caused By Inventory Oversupply</th>
<th>Problems Caused By Inventory Undersupply</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Diminishes cash flow</td>
<td>• Inability to perform certain procedures</td>
</tr>
<tr>
<td>• Takes up storage space</td>
<td>• Decreases patient comfort and satisfaction</td>
</tr>
<tr>
<td>• Wastes expired materials</td>
<td>• Greater costs for unexpected ordering and shipping</td>
</tr>
</tbody>
</table>

Without an inventory and ordering system in place that is stringently followed, oversupply and undersupply can ultimately impact a practice’s profit margins.

Does your practice experience oversupply or undersupply situations? □Yes □No

Please explain: ____________________________________________
_________________________________________________________
_________________________________________________________
_________________________________________________________

What are some steps that you and/or your practice could take to improve inventory control and ordering in your practice?

_________________________________________________________
_________________________________________________________
_________________________________________________________
_________________________________________________________
Organizing Your Inventory Control & Ordering System

Assessing the Current Condition of Your Inventory

Successful inventory control begins with assessing the current situation and evaluating the strengths and weaknesses of a practice's existing inventory control and ordering system. This includes determining the current overhead percentage for supplies, identifying who is in charge of the ordering process, and ascertaining if there is a system already in place. If the purchasing percentage is outside of the ideal range and/or the practice repeatedly experiences oversupply or undersupply complications, a new system may be necessary to reestablish the inventory and ordering process.

Use the following questionnaire to assess the current condition in your practice for controlling inventory and ordering necessary supplies.

Inventory Control Evaluation Questionnaire

1. Dental supplies comprise what percentage of operating costs?
   a. 5-10%  c. 16-20%
   b. 11-15%  d. 20+

2. Have we ever run out of certain clinical supplies?  ☐ Yes ☐ No

3. Have we ever had to throw away excess supplies because they were past their expiration date?  ☐ Yes ☐ No

4. How many staff members are authorized to order new supplies?

5. Who is responsible for ordering new supplies when our inventory is low?

6. Who is responsible for unpacking and storing our supplies when they arrive?

7. Are all of the inventoried supplies located together in a convenient location?  ☐ Yes ☐ No

8. Is there a protocol for ordering frequently used supplies?  ☐ Yes ☐ No

   If yes, describe the protocol: ______________________________________________________

9. What are the strengths and weaknesses of the protocol?____________________________________

10. Is there a system for determining when new supplies must be ordered?  ☐ Yes ☐ No

11. Would a new system be helpful in managing inventory control and ordering?  ☐ Yes ☐ No

   Please explain:____________________________________________________________________
Organizing Your Inventory System

How to Organize and Categorize your Supply Closet

Comprehensive organization, along with the cooperation of the entire dental team, is essential to improving ordering predictability and efficiency. The first change a practice needs to make is to store all products in one location and ensure that operatories only have working stock. Utilizing a common storage area, the supplies should be organized according to the most frequently used items in easy-to-reach areas, and the rest of the supplies grouped by procedure.

Frequently Asked Questions about Centralized Inventory

**Q: I am the only team member who uses these supplies. Why can’t I store them in my operatory?**
**A:** Many team members may feel as if they are the only ones who use the supplies. However, centralizing the product inventory location helps track how much product the practice actually and consistently uses.

**Q: I go through a lot of a certain item. Can’t I store extra in my operatory?**
**A:** Although team members may request extra supplies in their own operatories, the centralized product inventory system ensures that supplies are not wasted.

**Q: Can our office use multiple inventory locations?**
**A:** Some of your inventory must be stored in separate locations (i.e., the refrigerator, sterilization room, etc.). However, the majority of supplies should be stored in a centralized area and conveniently organized.

Tip:
Smaller items can be stored in bins or totes to help consolidate and contain them.
Establishing an Inventory Control Protocol

The “Tag” System

Once the supplies are centrally located, an inventory system can be implemented in order to control inventory reordering. One of the most popular and systematic approaches to inventory control is the “tag” system. The tag system maintains ordering regularity by utilizing designated minimum inventory and order quantities. A tag is then labeled for each product and secured to each of the minimum inventory amounts using a rubber band. When the product with the tag is used, the team member places the tag on the order hook or in a reorder file.

The Tag System Protocol

1. Create a tag for every product, identifying the minimum inventory amount and the reorder quantities on the back of the item’s tag.

2. Secure the tag to the minimum inventory amount using a rubber band.

3. When the product with the tag is used, the team member must place the tag on the reorder hook and/or in the reorder file.

4. On the product-ordering day, collect the tags from the ordering hook and/or the reorder file, and use the tags’ reorder quantities to create the order.

5. When the order is received, restock the items, placing the new supplies behind the existing inventory to ensure that the products are properly rotated.

Tip:
Many manufacturers will supply your office with a complete set of inventory tags for the products you have purchased from them.
Hiring a Supply Coordinator

The Role of the Supply Coordinator

Although a practice may authorize multiple team members to order supplies, it is recommended that one or as few people as necessary do the ordering to create a more systematic approach. One method for accomplishing this is to create a job description for a supply coordinator and have clinical team members apply for the role as a separate position. With a staff member dedicated to ordering and maintaining inventory, the practice can reinforce the importance of inventory control and help integrate the new system into place.

Is there someone in your practice who is designated and trained for inventory control and ordering? □ Yes □ No

Notes: ____________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

If No, what impact do you think having one person responsible for inventory control and ordering could make in the organization of your practice? ________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

What qualities do you think are important in a supply coordinator? ________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

Supply Coordinator Responsibilities

• Organize the inventory
• Determine appropriate minimum inventory amounts and reorder quantities
• Reorder supplies
• Restock and verify inventory when shipments arrive

By assigning one team member to complete the entire ordering and inventory stocking process, a practice’s supplies and inventory can be easily and consistently monitored and maintained. If a product is constantly being ordered, or if a product is frequently expiring on the shelves, the supply coordinator can then make the appropriate adjustments.
Hiring a Supply Coordinator

Sample Supply Coordinator Job Description

Note: When creating a new position for the supply coordinator, allocate a specific amount of time per week or month for inventory control and ordering. This helps ensure that the team member's clinical duties are covered during this time.

Position Title: Supply Coordinator

Employee Status: Non-Exempt

Reports To: The Supply Coordinator reports to the dentist and/or the office manager or office administrator.

Job Summary: The Supply Coordinator supports, as necessary, other staff members to ensure the quality of patient care and keeps the back office supplies, products, and equipment in excellent working condition.

Qualifications: To perform this job successfully, an individual must be able to satisfactorily perform each essential duty as listed below.

Essential Duties:
• Orders clinical supplies; ensures the most cost-effective vendors are being used.
• Maintains inventory system for supplies.
• Develops relationships with vendors.
• Checks supply invoices and follows up on discrepancies.
• Balances monthly supply billing statements.
• Opens and verifies supply shipments.
• Updates inventory log.
• Organizes physical inventory of supplies.
• Communicates with doctor on the status of supplies and expenses.

Knowledge/Skills/Abilities:
• Ability to maintain composure and professionalism when exposed to stressful situations.
• Knowledge of English composition, grammar, spelling, and punctuation.
• Skilled in the use of standard office equipment, including: telephones, calculators, copiers, fax, computers, and computer software (MS Excel, Word, Practice Management software).
• Ability to engender trust from dentists, co-workers, and patients.
• Ability to work cooperatively with management, staff, and patients.
• Ability to prioritize, organize, and complete tasks in a timely and independent manner.
• Ability to accept constructive criticism.
• Ability to understand and follow written and verbal instructions.
• Ability to collect data, establish facts, draw valid conclusions, and maintain confidentiality.
• Ability to communicate and express thoughts and ideas competently.
• Ability to quickly grasp relevant concepts regarding duties and responsibilities.

Education/Experience:
• High school diploma or equivalent
• Minimum of three year(s) relevant experience in the dental profession

Special Requirements/Certifications/Licenses:
• Valid X-ray certificate
• CPR & first aid certificate
• American Dental Assistants Association (ADAA) / Respective state dental assistants association membership

Physical and Environmental Requirements:
• May be required to lift up to 25 lbs.
• May be required to roll a 90-pound anesthesia machine and a full 35-gallon drum of expended chemicals on wheels from one area to another.
• May be required to physically assist drowsy patients after anesthesia.
• Active movement throughout the day: sitting, walking, standing, squatting, bending, stooping, reaching, etc. (not a sedentary position).
• Vision: close vision, color vision, peripheral vision, depth perception, and ability to adjust focus.
• Hearing: able to satisfactorily communicate with patients, dentist, and other staff members to ensure that verbal communication is clearly understood, particularly during emergency situations.
• Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or operate equipment.
• May be required to administer CPR.
• Occasional exposure to toxic or caustic chemicals and radiation.
• Exposure to moderate noise levels.
• Exposure to hectic, fast-paced, high anxiety environments.
Streamline Inventory Control & Ordering

Challenges with Team Member Integration

When implementing any new system into the dental practice, team member participation and support is very important to its success. However, challenges do exist. Many team members may not see a problem with the current inventory and ordering process. Others may be upset if their ordering authorization is being revoked. By understanding the perspectives of many team members, dentists can better explain the benefits of the new system and answer team member questions.

## Common Team Member Misunderstandings

<table>
<thead>
<tr>
<th>Team Member Misunderstandings</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Team members are afraid that the product(s) they love using won't be available when they need it/them.</td>
<td>Do you utilize your own system in your operatory because you are afraid of running out of supplies?</td>
</tr>
<tr>
<td>• So, they have their own tags in their operatories, not realizing that there is enough working inventory.</td>
<td>What reservations do you have toward a centralized and streamlined inventory control and ordering system?</td>
</tr>
<tr>
<td>• Team members believe they need their own personal tag system because they are the only ones that use something.</td>
<td>Are there products that you feel are necessary to keep extra quantities of in your operatory?</td>
</tr>
<tr>
<td>• Yet, with investigation, it’s realized that others in the practice sometimes use the same product without them knowing it.</td>
<td>What challenges exist from stockpiling supplies in individual operatories?</td>
</tr>
<tr>
<td>• Some products are only ordered and stocked for one or two dentists and are not centrally located.</td>
<td>Are there products that you feel are unnecessarily ordered or stocked at your practice?</td>
</tr>
<tr>
<td>• If another dentist wanted to use the same item, it would not be available to them.</td>
<td>Is it an easy process to try new materials within your practice?</td>
</tr>
</tbody>
</table>

What is your greatest concern about implementing a centralized and stringent inventory control and ordering system into your practice?
Streamline Inventory Control & Ordering

What Team Members Need to Know

As an integral part of inventory control and ordering, team members must trust that the new system will ensure that there is sufficient inventory and working stock in the practice. All team members must be trained in how the system works, including the importance of recognizing when they need to pull tags and where to place them. Many of the steps in the inventory control and ordering system rely on the consistency of dental team members in following the protocol and procedures.

Team members need to know how the tag system works.

Describe in your own words the tag system:


Team members need to know their roles and responsibilities in the tag system.

Describe your role and responsibilities in the tag system (i.e., operatory working stock, reordering supplies, etc.):


Team members need to trust the system.

What aspects of the tag system are most challenging for you?


The Ordering Process
Introducing Technology & Inventory Control and Ordering Software

New technology and software can enhance inventory control, increasing productivity and reducing the time it takes to order and monitor new inventory. Fully integrated products (e.g., Aruba eZ, Henry Schein Dental) harness the power of practice management style software programs to track inventory and simplify the reordering process.

Options for Placing Orders

Through a Sales Representative
- Advantages: One-on-one relationship with purchasing assistant; tracks history; reduces purchasing costs; available for questions about products
- Disadvantage: Diminishes opportunity to compare costs; time consuming to call for every order

Call Customer Service
- Advantages: Convenient; available for questions about products
- Disadvantage: Difficult to remember all of the product numbers and quantities

Online Purchases
- Advantages: Simple; straight forward
- Disadvantages: Requires research to compare costs; must input quantities and find product numbers

Software Management
- Advantages: Automated system; reduces purchase costs; convenient
- Disadvantage: Requires some time for installation and orientation

Simplifying the Ordering Process with Aruba eZ and Scanner Technology

- Used in conjunction with online ordering or inventory control and ordering software, scanner technology provides a quick and efficient way to reorder supplies.
- The Aruba eZScan scanner from Henry Schein Dental is a portable key-chain-sized scanner that conveniently works with the website or Aruba eZ software.
- It automatically inputs product information into the online shopping cart, along with the previously reordered quantity.
- With Aruba eZ, there is no guesswork or time spent deciding quantities of products to order, when to order, or how long it will take for the supplies to arrive.
- The system’s customizability enables practices to take control of the supply inventory and create a systematic, functional, and efficient approach to gain the ideal balance of supplies.

Looking at the Aruba eZScan in Practice

1. Gather the tags from the reorder hook.

2. Using the Aruba eZScan scanner, scan the tags and then simply connect the scanner to the computer.

3. If using the Henry Schein Dental website, go to the My Order page and click to upload the order.

4. If using the Aruba eZ inventory management software, click on the scanner icon at the top right of the order section of the screen.

5. The items will then be directly imported into the shopping cart on either the website or software.

6. To update the quantity, simply edit any of the quantities after the items are imported.
The Ordering Process

Setting Up Inventory Minimums and Reorder Quantities

Determining the minimum inventory quantities and ordering amounts can be challenging, since materials and supplies are used at different frequencies and have varied expiration dates. The minimum inventory amount should ensure that the practice has enough of the product for about two weeks, guaranteeing sufficient time for ordering, shipping, and stocking.

Goal of Inventory Control
To achieve an ideal balance between maintaining necessary inventory and curtailing overhead expenses.

Tips for Determining Appropriate Inventory Quantities
- Minimums should be based on your practice’s normal product consumption average and normal delivery timeframe.
- Some items may not need a minimum quantity in the supply area because you order them so frequently.
- It can be helpful to label the shelves with the item number and description for easy restocking.
- Inventory control software, such as Aruba eZ, can be helpful in determining your practice’s minimum inventory requirements and reorder quantities.

Examples of How to Calculate Minimum Inventory Quantities and Reorder Amounts from Henry Schein Dental

Example 1:
- Used 60 cans of Caviwipes in 12 months
- Average monthly use = 5 cans
- Henry Schein has price rates on 1 can or 12 cans
- Metrex offers 1 can free with purchase of 12
- Set Minimum Stock = 2 cans

Option A: Minimize inventory by setting reorder quantity to 5.
Option B: Maximize savings by setting reorder quantity to 12.

Example 2:
- Used 260 boxes of Criterion small gloves in 12 months
- Average monthly use = 21 boxes
- Henry Schein price breaks on 1 box, 10 boxes, or 20 boxes
- Set Minimum Stock = 2 or 3 boxes

Option A: Minimize inventory by setting reorder quantity to 12.
Option B: Maximize savings by setting reorder quantity to 20.

Example 3:
- Used 21 cans of Septocaine anesthetic in 12 months
- Average monthly use = 2 cans
- Henry Schein price breaks on 1 can or 10 cans
- Set Minimum Stock = 1 can

Option A: Minimize inventory by setting reorder quantity to ______.
Option B: Maximize savings by setting reorder quantity to ______.

Example 4:
- Used 36 boxes of Sterilization Pouches in 12 months
- Average monthly use = 3 boxes
- Henry Schein prices breaks on 1 box or 6 boxes
- Set Minimum Stock = 1

Option A: Minimize inventory by setting reorder quantity to ______.
Option B: Maximize savings by setting reorder quantity to ______.

Your Turn… Calculate Minimum Inventory Quantities and Reorder Amounts
Repeat this technique for all of the items in your supply storage areas.

Example 3—Option A (2) and Option B (10); Example 4—Option A (3) and Option B (6)
## Inventory Control & Ordering in Practice

### Helpful Reminders

Without a system and protocol in place, there is no way to control the inventory process and minimize the impact on profit margins. Thus, it behooves dental practices to integrate and implement ordering protocols and systems that ensure the appropriate quantities and supplies are consistently available.

<table>
<thead>
<tr>
<th><strong>DO</strong></th>
<th><strong>DON’T</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Have some flexibility and team member cross-training to ensure that supplies can be purchased during absences or transitions.</td>
<td>Authorize all team members to order dental supplies and materials.</td>
</tr>
<tr>
<td>Delegate ordering and inventory responsibilities to select practice team members.</td>
<td>Reorder items that have not yet reached their minimums.</td>
</tr>
<tr>
<td>Encourage team members to participate in the process and feel ownership of it.</td>
<td>Use the eye-ball method to determine supply minimums or reorder quantities.</td>
</tr>
<tr>
<td>Maintain a 15- to 30-day supply of most items in the supply area.</td>
<td>Consider the lag time between order and delivery when determining order day.</td>
</tr>
<tr>
<td>Encourage team members to follow the tag system protocol.</td>
<td>Keep more than working stock in your operatory.</td>
</tr>
</tbody>
</table>

### Suggested Reading

## Inventory Control & Ordering in Practice

### Expected Improvements

After implementing an inventory control and ordering system, practices should be able to reduce their supply overhead and inventory to between 6% and 8%. In addition to reduced overhead, this type of approach can help to improve cash flow, organize storage space, reduce excess material waste, and enable team members to understand which supplies and how many of them are needed.

### Eliminate Unnecessary Supplies

- Without tracking the movement of supplies, some items can be stocked and reordered without actually being used.
- By implementing a new system, practices can monitor and determine what supplies are unnecessary to the practice’s operations.

### Are there any supplies that you have noticed your practice keeps in its inventory but doesn’t use?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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</table>

If yes, what are they?

### Compare Similar Items

- By organizing and grouping the inventory by frequently used items and procedures, the supply coordinator can determine if the practice is ordering multiple brands of one item.
- Using this information and the opinions of the other dental team members, the supply coordinator can compare costs, uses, and advantages of each item to determine if they are both or all necessary.

### Does your practice stock multiple brands of a specific item?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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</table>

If yes, are they all necessary?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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</thead>
</table>

Please explain:

### Introduce New Products

- New products are constantly being introduced to the market and a disorganized inventory system can present challenges when integrating new products into a practice.
- Sometimes too much of a product is ordered, it doesn’t perform as expected or not enough is ordered, and it is never fully integrated into the reordering cycle and not available when it is needed.
- Either way, a systematic approach to inventory and ordering ensures that each product is appropriately tracked and monitored so that cost-effectiveness and availability are maintained.

### How does your practice integrate new products into use?

### What are the challenges or advantages to this method?

<table>
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<tr>
<th>Yes</th>
<th>No</th>
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</table>

Inventory Control & Ordering in Practice

Putting it All Together: How Inventory Control & Ordering Work

Disorganized and arbitrary inventory control and ordering lead to unnecessary practice overhead, wasted supplies, and loss of profit. Implementing a fully integrated inventory system not only improves profit margins, but also increases communication among team members and facilitates a more convenient and efficient ordering protocol. With the help of a software-based tag inventory system, dental practices can streamline the ordering process, promote organization, and regulate inventory expenses.

The Predictable Cycle of Inventory Control and Ordering

Key: SC = Supply Coordinator  TM = Team Member
On Monday Morning...

Now that you have a complete understanding of how disorganized inventory, oversupply, undersupply, and unsystematic ordering can negatively impact the practice, its profit margins, and growth, what aspects of how your practice handles inventory control and ordering—or your own role in these procedures—can you improve upon? What are some challenges that you see your practice facing when making these changes? In what ways do you think that your practice will benefit by implementing an inventory control and ordering system? Use the table below to outline goals that will help you and your practice integrate a systematic and organized approach to inventory control and supply ordering.

<table>
<thead>
<tr>
<th>Areas for Improvement in Your Practice:</th>
<th>Areas for Improvement in Your Own Role:</th>
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<table>
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<tr>
<th>Challenges for Your Practice:</th>
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<td>1. ____________________________</td>
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<td>2. ____________________________</td>
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<table>
<thead>
<tr>
<th>Challenges for Yourself:</th>
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<td>1. ________________________</td>
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<td>2. ________________________</td>
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<td>3. ________________________</td>
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</tbody>
</table>

Solutions: ______________________________________

Goals of Inventory Control and Ordering within Your Practice:

Acknowledgement

Contemporary Product Solutions would like to thank all the practice management experts who, over the years, have shared so much expertise to perfect our knowledge and practice of inventory control and supplies ordering.

About Contemporary Product Solutions

Contemporary Product Solutions conducts comprehensive lectures and hands-on training for the entire dental team (dentists, dental assistants, hygienists, front desk associates, and dental laboratory) in all areas of dental practice. Each year, Contemporary Product Solutions and its team conduct hundreds of education courses throughout the country and internationally at dental society meetings, specialized continuing education events, and other professional training programs.

Owned by Shannon Pace Brinker and her husband Erik Brinker, Contemporary Product Solutions is committed to delivering clinically relevant education and training that is up-to-date, evidence-based, and beneficial for the entire practice. For information about upcoming Contemporary Product Solutions courses, please call 1-888-259-9754, or visit www.contemporaryproductsolutions.com.