Practice Tools Series

The Dental Practice
Ordering System

A practical guide to getting your consumable ordering under control - once and for all.

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Why ordering goes wrong in dental practices

Most dental practices don't have a formal system for managing consumable ordering. Stock is ordered reactively - when something runs out, someone notices and raises the alarm. This leads to a predictable set of problems that cost the practice money, time, and unnecessary stress.

The most common problems

- Stock expiring in the cupboard - products that are rarely used sit at the back of the shelf and go out of date before anyone realises. RC prep is a classic example: it takes so long to get through one bottle that it's often already expired by the time you reach the stockpile.
- Ordering on urgency - running out of something mid-month means placing an urgent order with express delivery costs on top. This happens repeatedly throughout the year and adds up significantly.
- Multiple delivery fees every month - instead of one consolidated monthly order with one delivery fee, practices often end up placing three, four, or five separate orders. Each one carries its own freight charge.
- Five clinicians using five different products - when every dentist has their own preferred composite, bond, or prophy paste and there is no managed approach, you end up with a stockroom full of half-used products that never get properly rotated.
- No clear ownership - when ordering is everyone's responsibility, it becomes no one's responsibility. Things slip through the cracks, stock levels are inconsistent, and nobody has a complete picture of what's actually needed.
- Wasted time chasing small savings - having a staff member on a $35-an-hour wage spend 20 minutes on hold to negotiate a $5 discount on one item makes no economic sense. There are smarter ways to save on consumables.

THE BOTTOM LINE
All of these problems are fixable with one clear system, one responsible person, and a monthly process that takes less time than you think.

The one-person ordering role

The single most important change a practice can make is designating one person to own the ordering process. Not two people. Not the whole team. One person.

This person - let's call them the Ordering Person - is responsible for:

- Conducting the monthly stocktake of core items
- Placing the monthly consolidated order
- Maintaining the master product list and supplier contacts
- Managing back orders and following up with suppliers
- Adding wish list items when the budget has been reached
- Escalating high-value requests for approval

The Ordering Person does not need to be a senior team member. In many practices this role sits with a dental assistant or practice administrator who has good attention to detail and a methodical approach. What matters is that the role is clearly defined, the person has the right tools, and everyone else in the practice respects the process.

A NOTE ON CLINICIAN PREFERENCES

Clinicians will often have strong preferences about the products they use. This is completely valid - clinical preference matters. The Ordering Person's role is not to override clinical choices but to manage them sensibly. Where multiple clinicians use different versions of the same product, a conversation about standardising where possible can significantly reduce your stock complexity. Where standardising isn't appropriate, the master product list tracks each variant as a separate line item so nothing gets missed.

The three-tier authority system

Clear authority levels prevent two problems: things being ordered without approval, and things not being ordered because nobody was sure who could approve them. The three-tier system solves both.

Tier 1 - Standard orders (Ordering Person's authority)

The Ordering Person has full authority to order anything within the monthly budget. No additional approvals needed. This covers the vast majority of day-to-day consumable ordering and keeps the process moving without bottlenecks.

Tier 2 - The wish list

When the monthly budget has been reached, non-urgent items go on the wish list rather than being ordered immediately. The wish list is not a rejection - it is a deferral. These items are reviewed at the start of the next ordering cycle and ordered when budget allows. This protects the practice's cash flow without losing track of what has been requested.

Tier 3 - High-value approval

Any item above a set threshold - for example, $500 or $1,000, whichever your practice decides - requires approval from the Practice Manager or Practice Owner before it is ordered. The threshold amount is for your practice to determine based on your budget and the type of items you typically purchase. The key is that the threshold is clearly communicated and consistently applied.

Tier	What it covers	Who approves
1	Standard consumables within monthly budget	Ordering Person - no additional approval needed
2	Non-urgent items when budget is reached - wish list	Deferred to next ordering cycle - reviewed by Ordering Person
3	High-value items above your set threshold	Practice Manager or Practice Owner approval required

The monthly ordering process

The monthly ordering process should be consistent, quick, and low-stress when you have the right tools in place. Here is how it works.

Step 1 - The monthly stocktake

At the start of each ordering cycle, the Ordering Person works through the Core Monthly Checklist in the Excel template. This is a list of 15 to 20 high-velocity items that get used every month - things like disposable cups, prophy brushes, gloves, disinfectant, and sterilisation pouches. A physical count of each item is recorded in the 'On hand' column.

The status column in the spreadsheet will update automatically based on what you enter. Items flagged as Order, Low, or Out of stock get added to the order. Items showing OK are left alone.

Step 2 - Check the back order tracker and wish list

Before placing the order, check whether any back-ordered items have arrived or need following up, and review the wish list to see whether there is budget to include any deferred items this cycle.

Step 3 - Place the consolidated order

Place one order per supplier, not one order per product. Consolidating into a single monthly order per supplier means one delivery fee per supplier rather than multiple. Where possible, place all orders on the same day so deliveries arrive together and are easier to check in.

Step 4 - Check in the delivery

When the delivery arrives, check it against the order and update the spreadsheet. Note any items that are back-ordered or missing so they can be tracked. File or store the invoice according to your practice's accounts process.

The physical sticker system

Not every product needs to be stocktaked monthly. For products that are used infrequently or in small quantities - like RC prep, certain impression materials, or specialty composites - a physical sticker on the container itself is a much simpler solution.

The sticker system works like this: when a new container or pack is opened or placed into storage, a sticker is applied that tells anyone who sees it exactly when to reorder. The Ordering Person checks these during the monthly stocktake and adds anything flagged to the order.

The sticker options

Reorder when 1/4 remaining	For products where you want to stay well ahead - slow-moving items or those with long lead times.
Reorder when half remaining	For items where you want a moderate buffer.
Reorder when 3 units left	For items stored in multiples, such as cartridges or syringes.
Reorder when 5 units left	For items with higher minimum order quantities.
Reorder when 1 unit left	For items that are rarely used and take a long time to get through.
Do not reorder - order on demand	For products that expire before being used if kept in stock. RC prep is the classic example. These are ordered only when a specific case requires them.

The sticker templates are included in Tab 4 of the Excel template. Print them on A4 label sheets (6-up) and laminate if they will be stored in wet areas. Write the supplier name and product code on each sticker before applying it to the container.

Building a smarter supplier relationship

The goal is to have as few supplier relationships as possible, be genuinely loyal to those suppliers, and use that loyalty to negotiate better terms - rather than constantly shopping around for marginal price differences.

Why fewer suppliers is better

- One consolidated order per supplier means fewer delivery fees.
- A single point of contact at each supplier means faster resolution when things go wrong.
- Consistent ordering volume gives you genuine leverage when negotiating loyalty discounts or free delivery thresholds.
- Less time spent managing supplier relationships across the team.

How to approach loyalty discounts

Rather than having a staff member spend time calling suppliers to negotiate item-by-item discounts, approach your key suppliers once a year to negotiate a standing loyalty discount based on your annual spend. This is a much better use of everyone's time and generally results in a better outcome.

You can also negotiate free delivery above a certain order value, which is another reason why monthly consolidated ordering works in your favour over frequent small orders.

How to add new rows to the Excel template

This section is important. The Excel template uses dropdown menus and automatic colour coding in the Status column. If you simply type into an empty row at the bottom of a section, the dropdown and colour coding will not carry across automatically. Follow these steps to add new rows correctly.

Adding a new product to any section

1. Click on the last existing product row in the section you want to add to.
2. Right click on the row number on the left side of the screen and select Insert Row Below. This creates a blank row in the right position within the section.
3. Click on the row above your new blank row to select the entire row, then press Ctrl+C (or Cmd+C on Mac) to copy it.
4. Click on your new blank row and press Ctrl+V (or Cmd+V on Mac) to paste. This brings the dropdown options, the colour coding, and the Total formula across into the new row.
5. Type your new product details over the pasted data - product name, supplier, quantities, and unit cost. The formatting and formula will stay in place.

WHY THIS MATTERS

The Status column dropdowns and colour coding are applied as data validation and conditional formatting rules in Excel. These rules apply to specific cell ranges. When you insert a row within that range and copy from an existing row, the rules extend to the new row automatically. If you type into a row outside the defined range, the rules do not apply.

Deleting a row you no longer need

Right click the row number on the left side of the screen and select Delete Row. Do not just clear the cell contents - deleting the row keeps the spreadsheet tidy and maintains the integrity of any formulas that reference row ranges.

Getting started

Here is the recommended order for setting up this system in your practice:

6. Open the Excel template and read the Start Here tab before making any changes.
7. Update Tab 3 - Supplier Contacts with your actual supplier names, account numbers, rep names, and contact details.
8. Work through Tab 1 - Core Monthly Checklist and replace the example products with the 15 to 20 items your practice orders most regularly. Update the unit costs and reorder levels to reflect your actual stock.
9. Work through Tab 2 - Master Product List and add any additional products that need tracking beyond the core monthly items. Set the reorder trigger for each one.
10. Print the sticker templates from Tab 4, laminate if needed, and apply them to your containers.
11. Designate your Ordering Person, walk them through the system, and set your monthly ordering date.

ONE LAST THING

The best ordering system is the one that actually gets used. Keep it simple, keep it consistent, and review it once a year to make sure it still reflects how your practice operates. If you have questions or would like support implementing this system in your practice, reach out to us at info@dentalbusinessmastery.com.au