



RevolutionEHR

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RevolutionEHR Release Notes

5.4.6 – Barcode Scanning

Abstract

Enhancements to Inventory for the 5.4.6 release, including Barcode Scanning, Label Printing, and SKU Generation.

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1. Overview

The inventory enhancements described in this document will improve business processes for tracking and selling inventory. Through the use of barcode scanners and labels, practices will be able to lookup items, add items to orders, and add items to invoices with greater accuracy and speed. The new functionality will also lay the groundwork for future inventory enhancements, such as inventory reconciliation.

2. Barcode Scanning

2.1 Overview

This feature will allow for using a barcode scanner to scan a barcode on a physical item, which will trigger a specific action in RevolutionEHR. When a barcode is scanned, the system will search the UPCs of Products along with the UPCs and SKUs of Physical Inventory Items. If exactly one Product or Physical Inventory Item is found, the item will be selected. If multiple or no records are found, the system will display an error message.

Everywhere the barcode scanning feature is implemented, you will see a text field labeled "Find by Barcode" or "Add by Barcode" depending on the action that will occur. Before scanning a barcode, make sure that your cursor is focused in that field by clicking inside of it. By default, RevolutionEHR will focus your cursor on the barcode text field automatically when you open the screen, but if another action has been taken in the screen prior to scanning you will need to refocus your cursor in the barcode field.

If you do not have a barcode scanner, you will still have the option to type the barcode digits into the text field and hit the Enter key (or click the corresponding "Find" or "Add" button). This will perform the same action as scanning a barcode with a barcode scanner.

2.2 Hardware

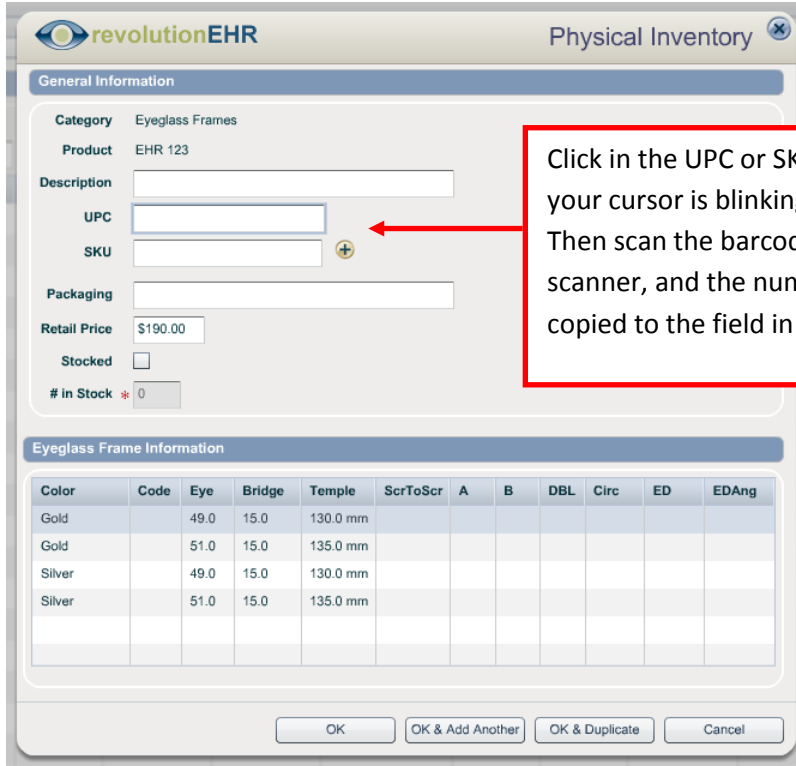
Almost every barcode scanner will be compatible with RevolutionEHR. Review the user manual for your barcode scanner to make sure that:

1. The scanner is in "keyboard wedge" mode and
2. The scanner outputs the "Enter" or "Return" key after each scan.

2.3 Adding UPC or SKU numbers to Inventory items

To use your scanner to find a Product or Physical Inventory item, a UPC or SKU must already exist in RevolutionEHR for that item. This can be done by typing the UPC or SKU number into the appropriate field, or the number can be added using your barcode scanner. This should be done when adding a new item but can also be updated for existing items.

With the appropriate Product or Physical Inventory item open, focus your cursor in the UPC or SKU field and scan the barcode for the item. This will copy that code into RevolutionEHR and reduce transcription errors that can occur when manually entering numbers:



Physical Inventory

General Information

Category: Eyeglass Frames
 Product: EHR 123
 Description:
 UPC:
 SKU:
 Packaging:
 Retail Price: \$190.00
 Stocked:
 # In Stock: 0

Eyeglass Frame Information

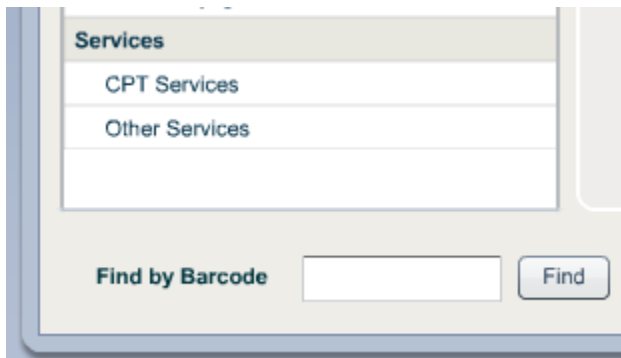
Color	Code	Eye	Bridge	Temple	ScrToScr	A	B	DBL	Circ	ED	EDAng
Gold		49.0	15.0	130.0 mm							
Gold		51.0	15.0	135.0 mm							
Silver		49.0	15.0	130.0 mm							
Silver		51.0	15.0	135.0 mm							

Buttons: OK, OK & Add Another, OK & Duplicate, Cancel

Note: If you are adding a Physical Inventory Item to an Eyeglass Frame product that was *imported*, the UPC will automatically be added based on the import data from FramesData.

2.4 Using your scanner to lookup items in Inventory

On the main screen in the Inventory Module in the bottom left, there is a new field called "Find by Barcode". When you first open the Inventory Module, this field will display your cursor focused in the field, allowing you to scan/enter a barcode immediately.



Services

- CPT Services
- Other Services

Find by Barcode:

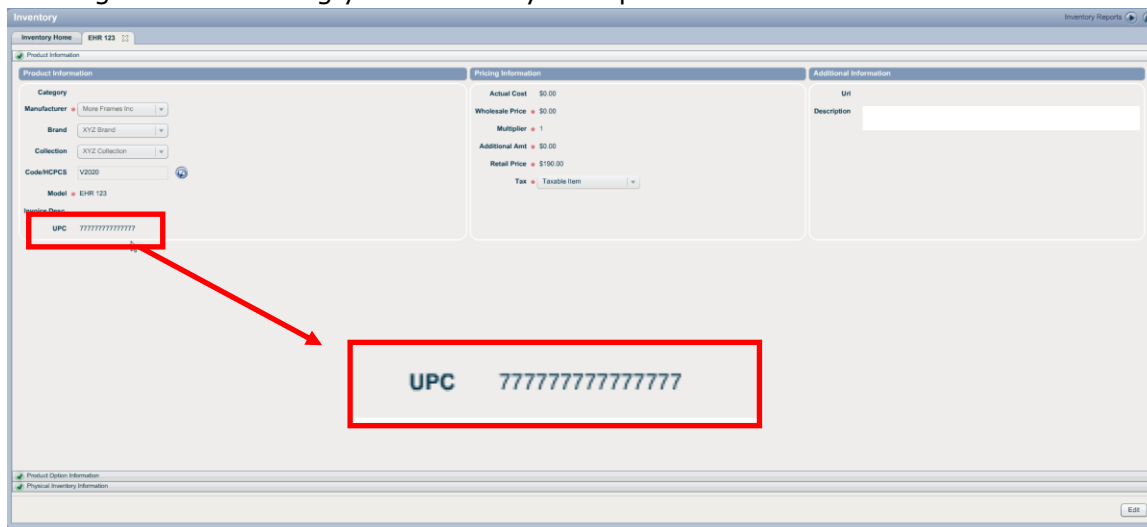
If a single matching Product is found, the system will open the Product tab for the matching Product. If the match is a Physical Inventory Item, the system will also expand the

“Physical Inventory Information” slider and select the item with the UPC or SKU matching the scanned barcode.

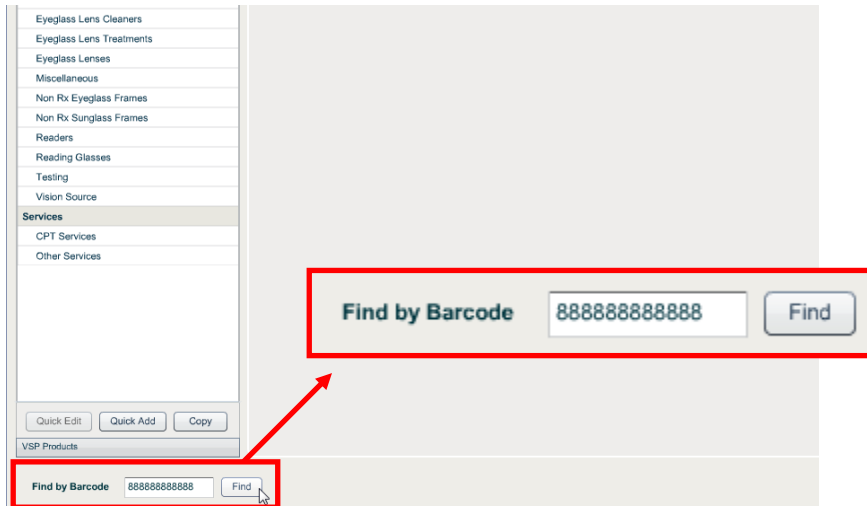
Matching Product:



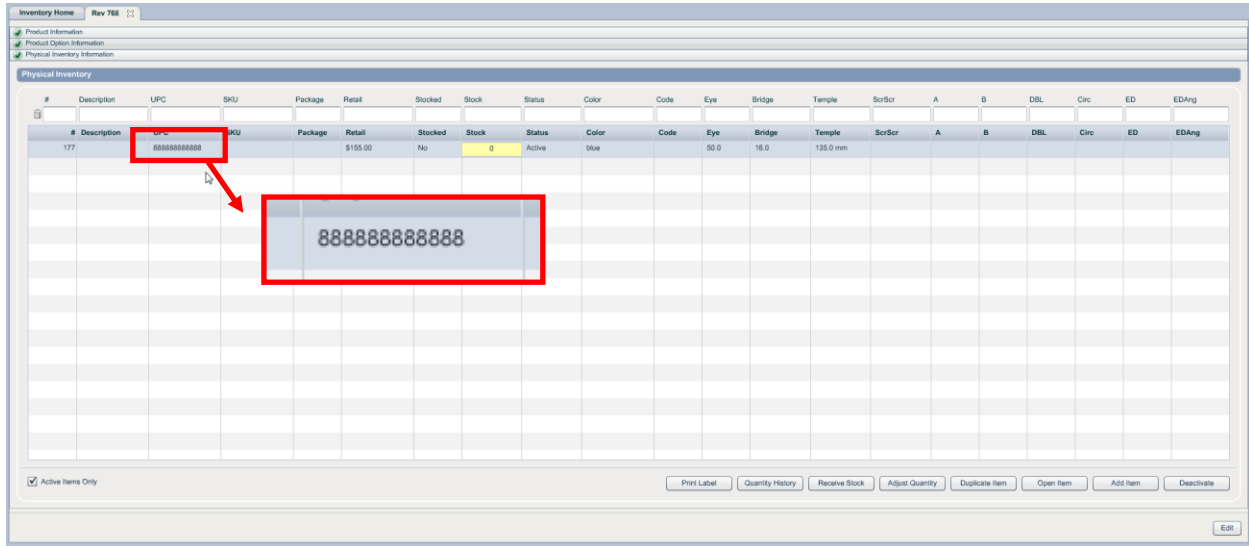
Clicking “Find” or hitting your Enter key will open:



Matching Physical Inventory Item:

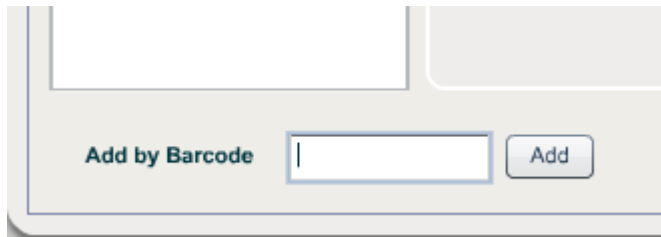


Clicking "Find" or hitting your "Enter" key will open:



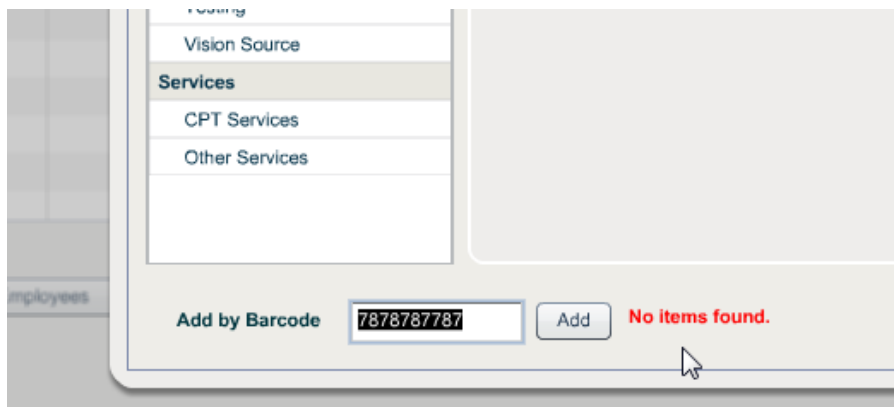
2.5 Adding Items to an Invoice

Your barcode scanner may now be used to add items to an Invoice. With the invoice open, click the "+" button to add an item as you normally would. When the *Select Product Item* window appears there will be a new field for "Add by Barcode" at the bottom.



Your cursor will be focused in that field as soon as the screen appears, allowing you to scan/enter a barcode immediately. After scanning/entering a barcode, the matching item will be added to the invoice and the barcode field will be cleared, allowing you to enter/scan the next item. In this manner, you can add multiple items to an invoice in succession.

If no matching Product or Physical Inventory exists in your Product Catalog, an error message will appear:

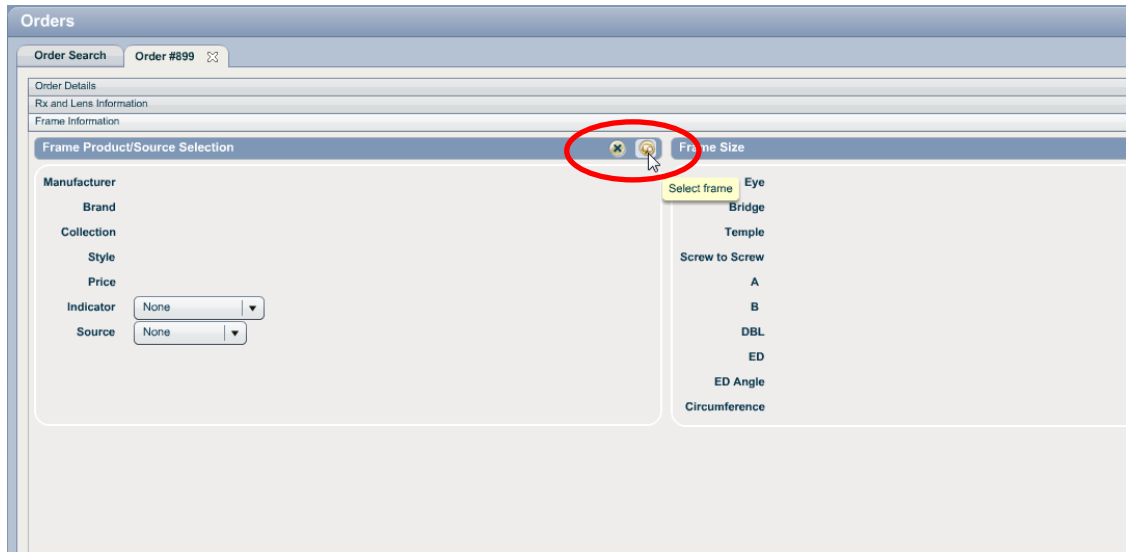


2.6 Add Items within an Order

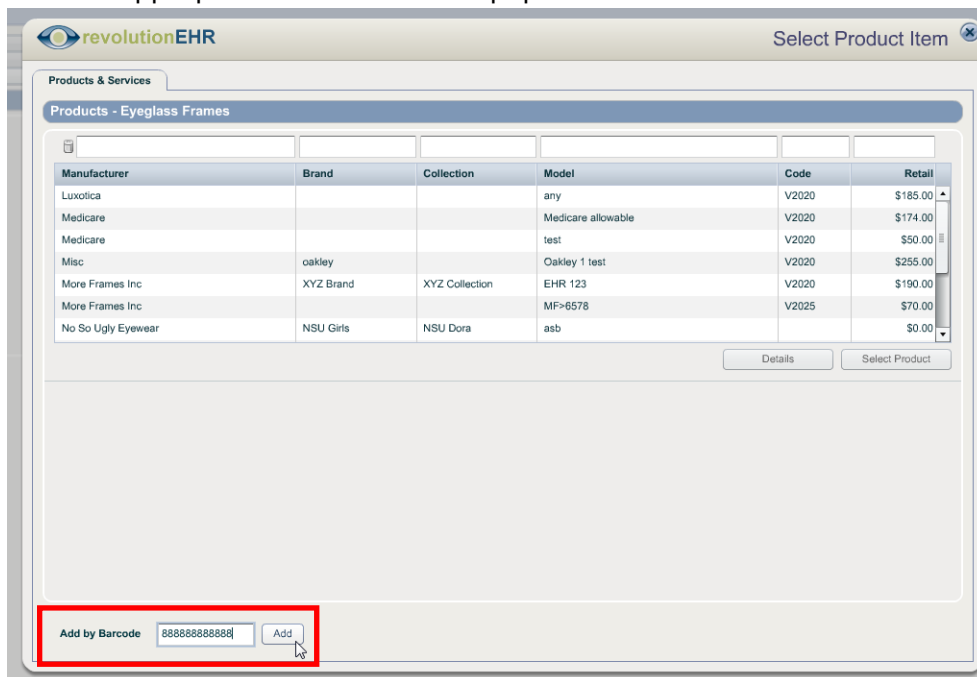
Just like adding an item to an invoice, the barcode scanner may now be used to look up and add items to an order. The most common use would be for the frame, but can be used for eyeglass lenses and lens treatments.

To add an item to your order using the scanner, first click the look up button to the right of the appropriate field. In the example below we will be looking for an Eyeglass Frame:

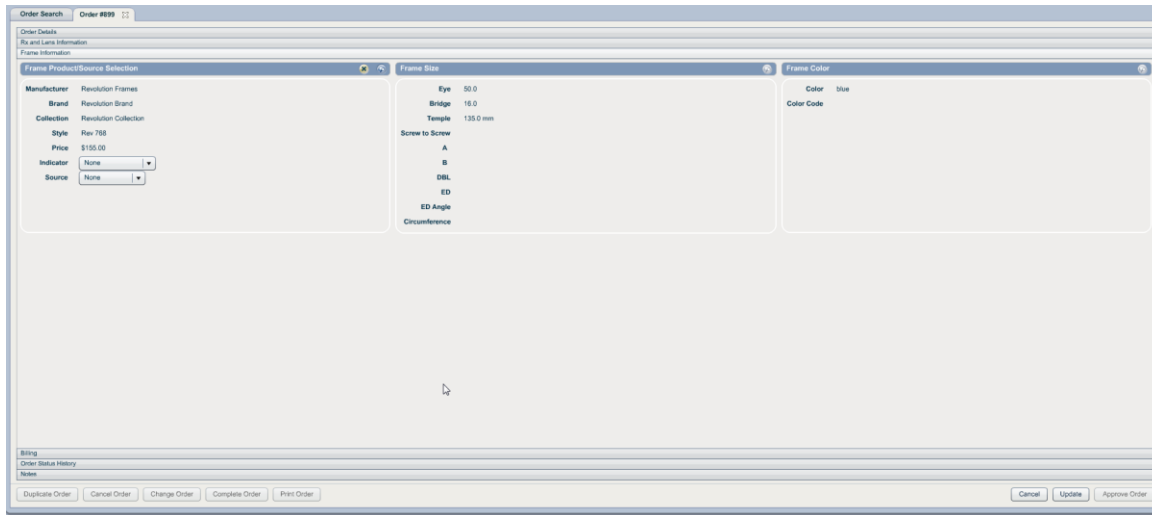
Click the Look Up button:



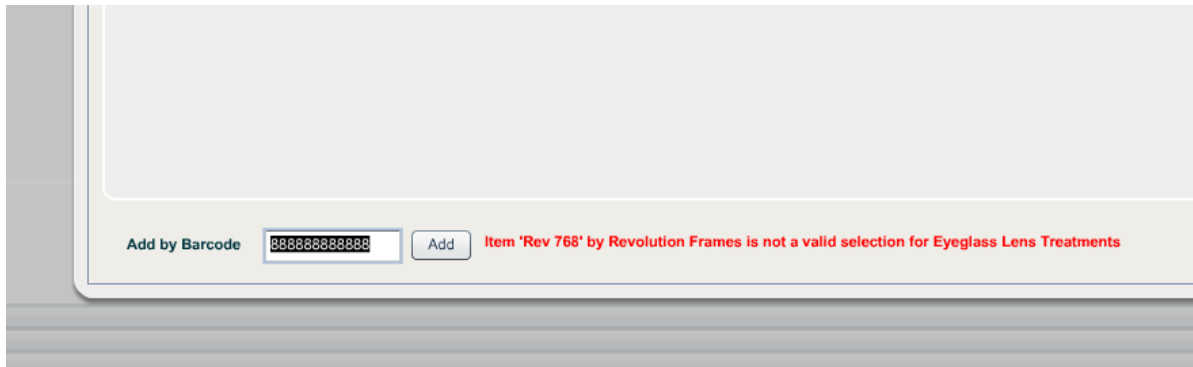
Your cursor will be focused in the "Add by Barcode" field in the bottom left. Simply scan and the appropriate number will be populated.



Click "Add" or hit your "Enter" key and the item will be added to the order:



The system will only add a scanned item if it matches the type of item expected in the section where you clicked the Lookup Item button. For example, you may not scan a frame item when adding a lens item to the order. If this is done accidentally, the system will display an error message notifying you that the item you scanned is not valid for the selection.



3. Label Printing

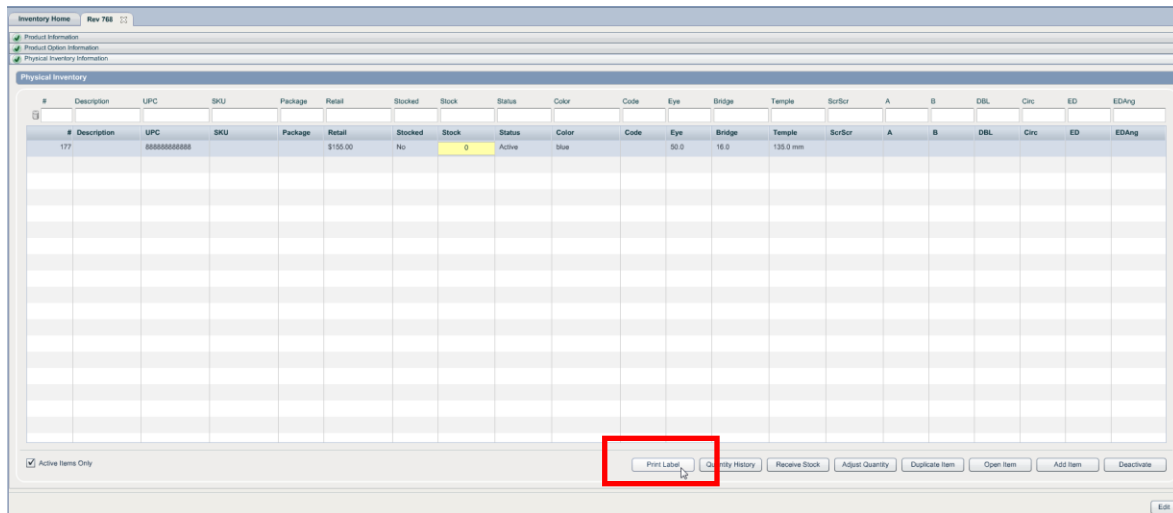
3.1 Overview

This feature will allow for printing labels with product item information and barcodes. Several formats will be provided with this release. If you have a need for an unsupported label format, please contact RevolutionEHR with your request. Future label formats will be incorporated based on demand.

3.2 Print Individual Label

To print a label for a Physical Inventory Item, open the appropriate Product in the Inventory Module, and click on the "Physical Inventory Information" slider.

Single click on the appropriate Physical Inventory Item to select, and click the new "Print Label" button below the items list.

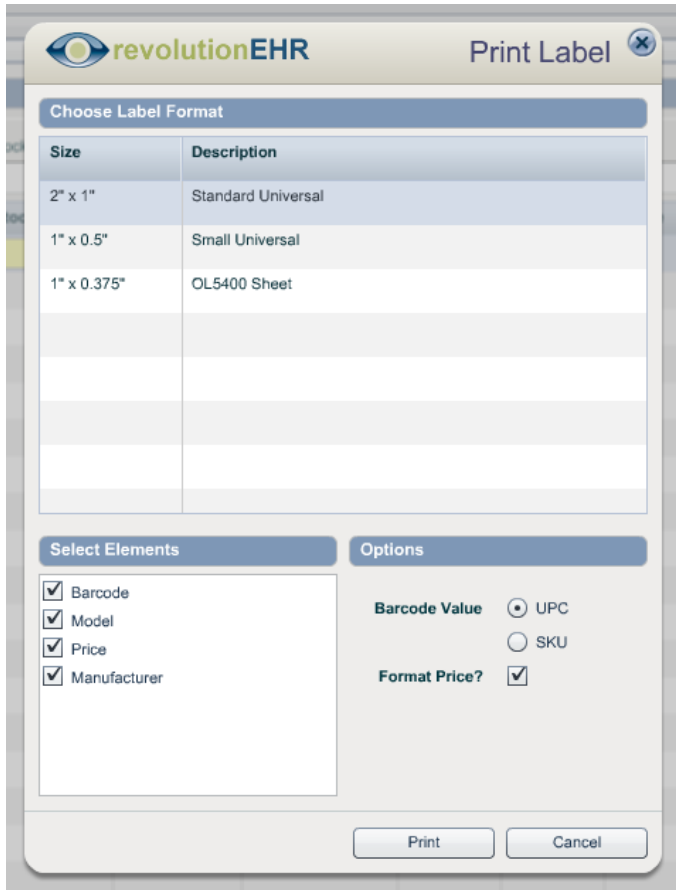


The "Print Label" window will appear.

Choose a label format. Each label format has different elements that can appear on the label. Select each element that you wish to appear on the label.

If you selected the "Barcode" element, you may specify which barcode value to use, either UPC or SKU.

If you selected the "Price" element, you may specify whether to format the price. A formatted price will appear as \$1,200.50. The same price without formatting will appear as 120050.



Size	Description
2" x 1"	Standard Universal
1" x 0.5"	Small Universal
1" x 0.375"	OL5400 Sheet

Select Elements

- Barcode
- Model
- Price
- Manufacturer

Options

Barcode Value UPC SKU

Format Price?

Print Cancel

3.2 Print Single Label on a Sheet

Some label formats are made for sheets of labels printed on Letter size paper. For these formats, you will see "Row" and "Column" fields under "Options". Specify the row and column numbers to determine where the label should be printed. For example, if you want to print the label four rows down and two columns across, specify 4 for "Row" and 2 for "Column".


Print Label ✕

Choose Label Format

Size	Description
2" x 1"	Standard Universal
1" x 0.5"	Small Universal
1" x 0.375"	OL5400 Sheet

Select Elements

Barcode
 Model
 Price

Options

Barcode Value UPC
 SKU

Format Price?

Row

Column

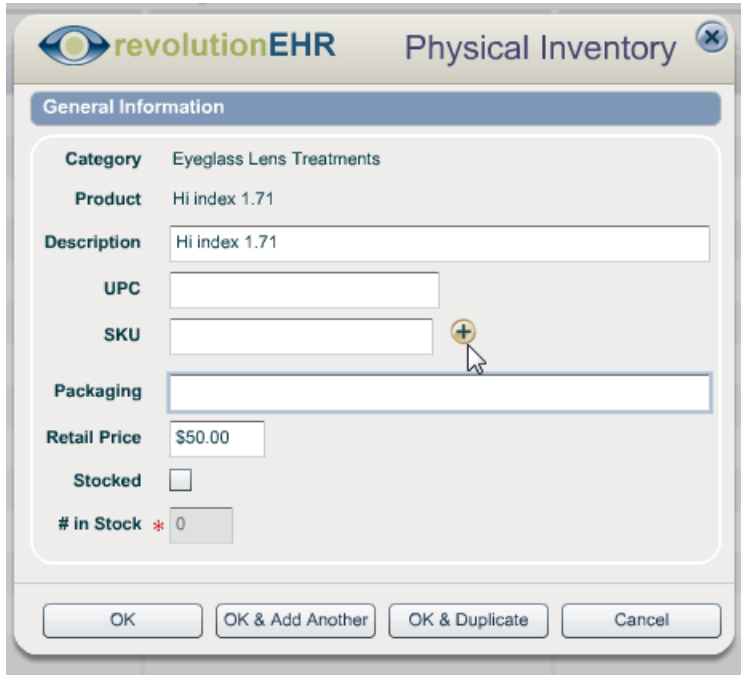
4. SKU Generation

4.1 Overview

This feature will allow for generating sequential SKUs for tracking Physical Inventory. SKUs start at 1000 and are unique per practice location. It is recommended to keep SKUs under 6 digits to accommodate printing small barcode labels. This feature provides a quick and reliable method of doing so.

4.2 Generate SKU

A SKU can be created for any Physical Inventory Item. Open the appropriate Product in the Inventory Module, and click on the "Physical Inventory Information" slider. Open the appropriate physical inventory item. To generate a SKU, click the new "+" button next to the SKU field in the Physical Inventory Window:



revolutionEHR Physical Inventory

General Information

Category Eyeglass Lens Treatments

Product Hi index 1.71

Description Hi index 1.71

UPC

SKU

Packaging

Retail Price \$50.00

Stocked

in Stock * 0

OK OK & Add Another OK & Duplicate Cancel

A unique SKU will be generated and added automatically:



revolutionEHR Physical Inventory

General Information

Category Eyeglass Lens Treatments

Product Hi index 1.71

Description Hi index 1.71

UPC

SKU 1002

Packaging

Retail Price \$50.00

Stocked

in Stock * 0

OK OK & Add Another OK & Duplicate Cancel

Note that the new SKU will not be saved unless you click the "OK" button. If you clicked the "+" button by accident and want to revert to the previous SKU, simply click "Cancel".