# Table of Contents

1. Overview ................................................................................................................. 3  
   1.1 Terminology ......................................................................................................... 3  
2. Setup .......................................................................................................................... 3  
   2.1 Administration ..................................................................................................... 3  
3. Update in Bulk .......................................................................................................... 6  
   3.1 Selection Process ................................................................................................. 6  
   3.2 Properties ........................................................................................................... 8  
   3.3 Pricing Dropdown Menu Terminology ................................................................. 11  
   3.4 Explanation of Schedule Updates Terminology .................................................. 13  
   3.5 Pricing ................................................................................................................ 14  
4. Additional Details ..................................................................................................... 18  
   4.1 New Features ...................................................................................................... 18
1. Overview

Product Catalog management is the first phase of a larger enhancement. When all phases are complete, this feature will allow practices to easily manage products and services across locations, transfer inventory between locations, generate lists of items that need replenishment, and receive products with improved efficiency.

For single location practices, or practices that do not want to use a Distribution Center, this new feature still offers the benefits of update pricing and properties in bulk.

This document outlines the processes provided in Phase 1:
- Designate a Distribution Center and Subscriber locations
- Bulk updates to Product Properties
- Bulk updates to Product Pricing

1.1 Terminology
- **Distribution Center**: The practice location that will control the Product Catalog for locations designated as Subscribers.
- **Subscribers**: Locations within the practice that will have their Product Catalog controlled by the Distribution Center.
- **Calculated Retail Pricing**: The retail of any product using Calculated Retail Pricing will be equal to (Wholesale Price x Multiplier) + Additional Amount.
- **Manually Entered Retail Pricing**: Any product whose retail has been set manually without using Calculated Retail Pricing.

2. Setup

2.1 Administration

2.1.1 General – Practice Preferences

Inventory Management is a Practice Preference and can be enabled through Administration → General → Practice Preferences → Additional Preferences → Enable Inventory Management.

Once this setting has been enabled, logout of RevolutionEHR and log back in to see the new features associated with Inventory Management.
2.1.2 General - Locations

For practices with more than one location, RevolutionEHR now allows the ability to designate a location as a Distribution Center. Other locations may be set as Subscribers to the Distribution Center (see Terminology, section 1.1). Access Admin > General > Locations > (Open the practice location that will be the distribution center) > access the Inventory Distribution Center slider. Check the box beside “Location is a distribution center.” For the purpose of our example, notice we have named our practice “Main – DC.”

Once the box is checked, the right side of the screen will list all locations within the practice. For demonstration purposes, we have named the locations North-NS (non-subscriber) and South-S (subscriber). Move any location that should be designated as a subscriber to the “Distribution Center Subscribers” column by one of 3 ways: drag and drop; highlight location and click the < button; double arrows << will move all locations listed. The same process can be used to remove locations from the Distribution Center Subscribers list.
The subscriber location (South – S) is now under the “Distribution Center Subscribers” column. Our non-subscriber location remains under the Locations column. When all appropriate locations are set as subscribers, click ‘Update.’

2.1.3 Employee / Roles

The ability to Update Properties and Pricing is an Access Permissions setting that is User Role specific. By default the System Administrator role has these permission settings already enabled. To provide these permission settings to additional User Roles access Administration > Employee / Roles > User Roles > (choose a user role and open) > Click Edit > Click the arrow beside Inventory Module > Check the boxes beside either/both ‘Update Properties’ and ‘Update Pricing’ > Click ‘Update.’ Please Note: ‘View Inventory’ must also be checked.
3. Update in Bulk

3.1 Selection Process

3.1.1 Location selection

Access the Inventory module, and within the ‘Locations’ dropdown menu choose a location. This can be a non-Distribution Center location if the changes do not need to be pushed to subscribing locations. If the changes do need to be pushed to subscribing locations then the location selected must be the Distribution Center.

All changes made to products within the Distribution Center will automatically update the Product Catalog for the locations designated as subscribers to the Distribution Center. This applies to individual product changes and to bulk changes detailed in this user guide. **This does not apply to any Physical Inventory changes made at the distribution center level, including stocked quantity and pricing of the stocked item.**

**Important Note:** When a new product(s) is imported (this does apply to products added using the “Add Product” button), the new product will not be pushed out to the subscribing location(s) until a property and/or price for the product(s) is updated.

3.1.2 Product selection

Price and property updates can be applied to all products within a single category, or a subset of the selected product category. To create a subset use the filters displayed at the top of the grid. The filters available are Code, Sales Rep, Manufacturer, Brand, Collection, Model, Retail and Status. In addition, a new "Calculated Price Products Only" filter has been added at the bottom left of the screen. Checking this box will return a list of products that have a Calculated Retail Price. (See terminology, section 1.1)
1. Highlight a product category. All items within that category will be listed in the grid view.

2. To update a specific subset of the selected product category, type in the appropriate filter field found above the grid.

The number in parenthesis displayed in the buttons labeled ‘Update Properties’ and ‘Update Pricing’ will indicate how many products will be updated.
3.2 Properties

3.2.1 Update Properties

To select the products to be updated, ensure you have followed the information within sections 3.1.1 and 3.1.2. Once the list has been configured, click ‘Update Properties.’ The popup window for “Bulk Update Properties” will open.

Notice the options for “Bulk Update Properties” are derived from the properties available in the Product Information slider of a Product.

Check the box(es) to the left of Product Properties you would like to apply changes to, and click ‘Next.’ (In the example below, we have selected all product property options.)
Based on the product properties you have chosen to update, a popup window that includes the fields necessary to update those properties will open.

**Important Note:** If you need to change or clear your “Bulk Update Properties” selections, click 'Back' and uncheck/check the appropriate box(es).

Enter appropriate information to be updated.

1. **Product Status:** The radial button will always default to ‘Inactive.’ Change to ‘Active,’ if appropriate.
2. **Code/HCPCS:** Type the new code information.
3. **Invoice Description:** Text entered in this field will display as the description on an invoice.
4. **Sales Rep:** Use the dropdown menu to select the Sales Rep. The list of Sales Reps can be configured in Admin > Vendors / Partners > Sales Representative.

5. **Actual Cost:** Access the dropdown menu and choose the option that best meets your needs. See section 3.3 for explanation of dropdown menu options.

6. **Actual Cost Value:** Enter appropriate numeric value.

7. **Tax:** Use the dropdown menu to select the appropriate tax. If the tax name at the Distribution Center matches the tax name at the subscribing location(s), the selected tax will be added to all filtered products at the tax rate configured for that location. If the tax name does not match or no tax is configured at the subscribing location(s) then the system will create the selected tax name and rate for those location(s). Keep in mind, this new tax name/rate will be available after logging out and back in once the property change has been applied.

**Important Note:** With the exception of Actual Cost, any fields that are left blank will cause data to be removed from the products being updated. It is recommended that you never select a field for update if no changes are being made to that field. Actual cost cannot be left blank, a value must be entered.

After all information has been entered, click ‘Update Products.’

A ‘Success’ message will indicate your products will be updated.

### 3.2.2 Messaging

Your ‘Messages’ inbox within RevolutionEHR will receive two separate messages after every bulk update:

- First message: “Property Change Request Submitted.” This email will detail the changes you have submitted.
3.3 Pricing Dropdown Menu Terminology

In preparation for property and pricing updates, it is important to understand the dropdown menu options related to pricing changes. The following information defines each dropdown menu option.

3.3.1 To An Amount

The option of "To An Amount" allows the user to determine a new value. Regardless of the current pricing information, the new value entered will be the new amount applied to all selected products. In this example, the wholesale price will be updated to $50.00 for all selected products.
3.3.2 By An Amount

The option of “By An Amount” allows the user to determine how much more/less they want added/subtracted to the current value.

Example:
The current wholesale price is $60.00.

We are adding $10.00.

The new Wholesale will be $70.00. The new values will vary for each product depending on the starting value of each product.

3.3.3 To A Percentage

The option of “To A Percentage” allows the user to create a new value by using a percentage to alter the existing value. Enter a percentage under 100% to lower the value. Enter a percentage over 100% to increase the value.

Using our prior example with the wholesale price of $60.00, we will change the price to 90% of the current value.
Wholesale will be $54.00 -- $60.00 x 90% = $54.00

3.3.4 By A Percentage

The option of “By A Percentage” allows the user to create a new value by using a percentage to alter the existing value. Enter a positive percentage to increase the value. Enter a negative percentage to decrease the value.

Using our prior example with the wholesale price of $60.00, we will increase the price by 10%.

Wholesale will be $66.00 -- $60.00 + ($60.00 x 10%) = $66.00

Note: “To a Percentage” and “By a Percentage” can both be used to increase or decrease values using percentage. Which method you choose is a personal choice.

3.4 Explanation of Schedule Updates Terminology

As with the pricing dropdown menus, it is also important to understand the terminology used in Step 2-Schedule Updates:

- **Now**: Changes will available on the products usually within 1-4 hours.
• **Starting On:** Changes will be available on the date specified.

  ![Starting On](image)

• **From – To:** Changes will begin and run through the dates specified. In our example, values will be reset to their original value on 08/09/2015.

  ![From - To](image)

### 3.5 Pricing

#### 3.5.1 Update Pricing

To select the products to be updated, ensure you have followed the information within sections 3.1.1 and 3.1.2.

Once the list has been configured, click ‘Update Pricing.’ The popup window for “Bulk Update Pricing” will open. Notice in the screen image below, the default within “Retail Price” is “Calculate Retail Price.” The following instructions are for “Calculate Retail Price.”

1. Fill in the fields for any pricing option that needs to be updated. See section 3.3 for explanation of dropdown menu options. Note: It is not required to fill in all fields. Only those that need to be updated should be populated. (Notice, we do not change the ‘Additional’ amount.)
2. Click ‘Next.’

![Bulk Update Pricing](image)
3. Use the dropdown menu to determine the effective date of the changes and click ‘Next.’ See section 3.4 for further detail on dropdown menu options.

4. A pricing preview popup window will become available. Review the pricing changes you have made.

![Bulk Update Pricing](image)

The ‘Wholesale’ and ‘Multiplier’ were changed.

Retail has been calculated.

‘Additional’ was unchanged.
5. Hover your mouse over the ‘i’ icon for a detailed view of the original pricing information and the new modified changes.

6. If there is a specific item you do not want included on the pricing changes, click the red minus icon to remove that item. If all other pricing information is accurate, click ‘Update Products.’

7. After scheduling your changes, a ‘Success’ message similar to the one below will indicate when your changes will be updated.

8. You will receive two messages within your inbox, similar to the information we have reviewed for updating product properties. (Section 3.2.2.)
As previously mentioned, the default setting for “Retail Price” is “Calculate Retail Price,” however, the user has the option to “Manually Change Retail Price.” This setting will allow users to update the retail price for the selected items without using the system calculated retail price formula. If choosing this setting, the retail price field is required.

Screen image of product price before manual price change.

Screen image of product price after manual price change. Notice the prior pricing information (Actual cost, Wholesale Price, Multiplier, Additional Amount) has not changed – only the Retail Price has been updated.
4. Additional Details

4.1 New Features

4.1.1 Pricing History

The ability to view pricing history for products has been added. This new feature can be found in Inventory > Products > (open a product) > Product Information slider. Within the Pricing Information header, click on the new “Pricing History” icon.

The line-item highlighted in green is the current pricing information. The last column indicates if the retail price was calculated by the system. (“Calculated Retail Price” for definition see section 1.1.)

For ‘non-batch’ pricing changes, the Updated On and Effective Date will be the same. For ‘batch’ pricing changes, the Updated On date would be the date the pricing request was applied and the Effective Date is the date the requested price updates will take effect.