

SedonaBarcode

10/18/2024 4:51 pm EDT

This Reference Guide is for use by SedonaOffice customers only. Its purpose is to provide an overview of the content contained within and is to be used for reference purposes only.

Overview

SedonaBarcode is an add-on module sold and provided by SedonaOffice. The module allows for direct scanning of parts to assist with assessing parts, ordering and receiving parts, and performing physicals. GS1 Standard barcoding schemes are supported, including UPC-A, UPC-E, EAN-8, EAN-12, EAN-13, and ITF encode GTIN-14.

The module can also assign bar codes to purchase orders, job and service tickets, invoices, and statements to assist with data entry.

SedonaBarcode must be purchased and activated before use. To get started with this module contact Support@SedonaOffice.com.

Barcode scanners must be purchased separately. For best compatibility we recommend "Symbol" brand scanners. The most commonly used models are Symbol (Motorola) models: LS2208 (hardwired version) and LS4278 (wireless version). All models must have a USB interface in order to connect to a SedonaOffice workstation. In some cases, the USB interface is an add-on accessory. The chosen scanner must also support OPOS (Motorola/Symbol has an OPOS driver that works with many of its scanners).

Inventory Part Barcodes

Barcodes can be used to open parts, order parts, receive parts, and perform physical inventories. Before using any of these features any part barcode you wish to scan must be bound to the associated part in SedonaOffice.

Binding Barcodes to Parts

SedonaOffice learns part barcodes as they are scanned. If you scan a barcode and the system doesn't recognize it will ask you to bind that barcode to an existing part. The part must already exist in inventory before the barcode is scanned. Once bound, the barcode will show under GTIN (Global Trade Item Number) on the part.

To bind a barcode to a part:

1. Log into SedonaOffice. There is no need to click on Inventory; SedonaBarcode will work straight from the SedonaOffice home screen.
2. Using your barcode scanner, scan the barcode on your package/part.



3. The 'Add GTIN for Part' window will appear. Click the binoculars and search for the part associated with the scanned barcode.

Add GTIN for Part

GTIN: 00634680880357

☐ Internal Use

Part: [Barcode Icon]

Package Count: 1

OK Cancel

- After selecting the correct part, enter the part's Package Count. For many parts the package count is simply one, but if multiple items come in a pack with a single barcode the number of items in that pack should be entered. For example, if you have 12 parts that come in a package with a single barcode on the box, enter 12 for the package count.

Add GTIN for Part

GTIN: 00634680880357

☐ Internal Use

Part: 1085TW Surface Mount Contact, Wide Gap

Package Count: 12

OK Cancel

- Select OK and the barcode will be bound to the selected part. If there are multiple vendors on a part you may save a different GTIN's for each vendor.

Opening Parts and Editing GTINs

Parts that have been bound to a barcode can be opened in SedonaOffice by scanning the part. From anywhere in SedonaOffice simply use your bar code scanner to scan the part. The part explorer screen for that part will automatically open.

Select GTIN from the bottom of the part tree and the barcode(s) associated with that part will display. Remember that if there are multiple vendors on a part there may be multiple GTINs listed. To Add, Edit, or Delete a GTIN right click anywhere in the right space on the right and these options will display.

SedonaOffice

File Edit View SedonaOffice Customer Query Tools Window Help

Inventory Part - 1085TW (Surface Mount Contact, Wide Gap)

Part Code: 1085TW
Description: Surface Mount Contact, Wide...
Detail: Surface Mount Contact, Wide...
Costing Method: Standard
Product Line: Burg Control Panels
Manufacturer: DWP
Manuf Part Code: 1085TW
Special Order: N
Sales Description: Surface Mount Contact, Wide...
Sales Price: \$11.00
Service Description: Surface Mount Contact, Wide...
Service Price 1: \$11.00
Service Price 2: \$25.00
Total Qty: 0
Total Value: \$0.00

Warehouse: CA Main
Branch: CA
Account: 12000
Minimum Qty: 0
Maximum Qty: 0
Committed Qty: 0
On Hand New: 0
On Order Qty: 0
Out For Repair: 0
Value On Hand: \$0.00
Row:
Shelf:
Bin:
Inactive: N

GTIN	Package Count
00634680880357	12

Creating Purchase Orders

If you scan a barcode while creating a new purchase order the system will automatically add the scanned part to the PO. To do this:

1. Go to Accounts Payable – Purchase Orders – New.

Note: The bar code scanner can be used anytime a new PO is created, even if it is not created from the AP purchase orders list.

2. Select a vendor if one did not already default in. A vendor must be selected before parts can be scanned.
3. Scan the barcodes for the parts needed on the PO. If you scan the same part multiple times it will increase the quantity of the part on the PO. For example, if you needed 3 of part 0300-004 you could enter 3 in part the quantity field, or you could scan the barcode for this part three times.

The screenshot shows the 'New Purchase Order' window. At the top, there's a 'Vendor' dropdown set to 'ACI' and a 'Category' dropdown set to 'SIC 7400'. Below this, the 'Purchase Order' section contains fields for 'PO Number', 'Branch', 'Warehouse', 'Trading #', 'Order Date', 'Ship Date', 'Ship Method', 'Parts Due Date', and 'Sub Number'. A 'No Special Order Parts Allowed' checkbox is also present. At the bottom, there's a table with columns: 'Part', 'Description', 'Vendor Part', 'Qty (Qty)', 'Quantity', and 'Cost'. The first row shows part '0300-004' with a quantity of 1. A blue arrow points to the 'Quantity' field for this part.

Part	Description	Vendor Part	Qty (Qty)	Quantity	Cost
0300-004	ACI SMALL INDOOR NETWORK CAMERA (S)	SH4637	1	1	182.35

Receiving Parts

When it is time to receive a PO the bar code scanner can be used to indicate how many of which parts were received.

To receive parts with a barcode scanner:

1. Scan the barcode of the part or package you are receiving. This will bring up the part in SedonaOffice and the open purchase orders list will display.
2. Find the associated PO, right click on it, and select Receive PO.

Note: This method is the fastest way to receive a PO using the barcode scanner, however the bar code scanner can be used anytime a receipt is created, even if it is not created from the part summary screen.

Inventory Part - PCI3 (PCI INTERGRATED SERIAL INTERFACE)

PCI3

Warehouses:

- Main-MI
- 03181974
- ABC Service Co
- Alarmists
- Alpha
- Andrea's Warehouse
- Belgium
- Borque Fire
- BR
- Coolest warehouse
- Fred's Truck
- Jenine's Truck
- M100
- M101
- M103
- M104
- Main-OH
- Meeka
- Mellissa
- M1999
- MI-Cust Repair
- MI-MP
- Mine
- O200
- O201
- Obsolete-MI
- OH-MP
- Repair Warehouse
- RTV-MI
- RTV-OH
- SPAIN
- TP
- UK

Part Code: PCI3
Description: PCI INTERGRATED SERIAL IN...
Detail: PCI INTERGRATED SERIAL IN...
Costing Method: Standard
Product Line: Access Control Equipment
Manufacturers: Northern Computers
Manuf Part Code: PCI3
Manuf Warranty: Six Month
Item Code: Job Part LCOM
Income Acct: N/A
Direct Exp Acct: N/A
Freeze Purchases: N
List Price: 436.15
UPC:
Special Order: N
Sales Description: PCI INTERGRATED SERIAL IN...
Sales Price: \$436.15
Service Description: PCI INTERGRATED SERIAL IN...
Service Price 1: \$396.50
Service Price 2: \$396.50
Total Qty: 29
Total Value: \$5,110.38

Warehouse: Main-MI
Branch: MI
Account: 120000
Minimum Qty: 0
Maximum Qty: 0
Committed Qty: 0
Pending XTRF In: 0
Pending XTRF Out: 3
On Hand New: 29
On Order Qty: 2
Out For Repair: 0
In Holding Qty: 0
Value On Hand: \$5,110.38
Row:
Shelf:
Bin: Inactive
N:

Open PO's

PO #	Category	Status	Order Date	Due Date	Cost	Quantity	Vendor Part	Package Qty
3242	SVC T&M	Open	4/20/2016		\$176.22	1	NC-PCI3	1
3329	SVC T&M	Open	4/6/2017		\$176.22	1	NC-PCI3	1
2901	Admin G & A	Open	8/24/2016		\$176.22	1	NC-PCI3	1
2568	Jobs Com	Open	4/13/2016		\$176.22	1	NC-PCI3	1
3427	Jobs Res	Open	5/5/2017		\$176.22	1	NC-PCI3	1
3407	Jobs Res	Open	4/27/2017		\$176.22	11	NC-PCI3	1
3415	Jobs Res	Open	5/1/2017		\$176.22	10	NC-PCI3	1
3262	D-S&A	Open	3/9/2017		\$176.22	1	NC-PCI3	1
3263	D-S&A	Open	3/9/2017		\$176.22	1	NC-PCI3	1

Open RO's

Repair #	Category	Status	Order Date	Due Date	Cost	Quantity
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3. Manually set the Quantity to zero for all parts on the Main receipt.

4. Scan the barcode for each part you are receiving. The quantity of each part on the receipt will update to match the parts scanned. If the part is a package including multiple items the receipt will show the number of *packages* in the quantity field.

Parts Receipt

Vendor: ADI
Category: Installation
Close - No Bill Expected:
Create Bill From Receipt:

PO# 3149
ADJ
47247 Carter Dr.
Watson, MI 48093

Reference #: CA
Branch: CA Main
Warehouse: CA Main

Receive Date: 3/12/2014
Received By:
Other Costing:

Direct Expense:
Receive to Warehouse:
Receive & Issue Immediately:

Parts: 700.00 **Expense:** 0.00 **Documents:**

Part Code	Description	Vendor Part	Plg Qty	Quantity	Cost	Amount	Serial No	Lot No	Stand Cost
D162	Test Part		0	35	700.00				35.00

Memo: All bills submitted for payment must reference a Purchase Order number.

Part Total: 700.00
Expense Total: 0.00

Print Stock Labels **Apply** **Save** **Close**

5. If you would like to print stock labels for individual parts select the Print Stock Labels button on the bottom left of the receipt. The system will print one label for each part, and/or one label for each item in a package.

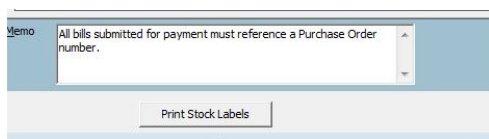
Memo: All bills submitted for payment must reference a Purchase Order number.

Print Stock Labels

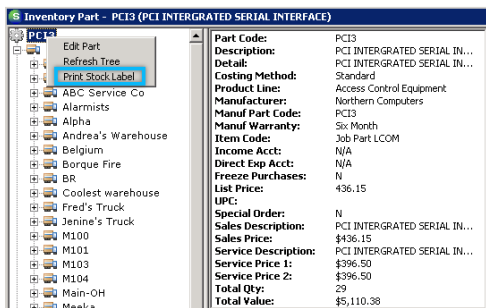
Printing Stock Labels

Stock labels can be printed from a PO receipt, or from the part summary screen. They were designed to be printed using Zebra Label printers. Parts that come in packages should have one label printed for each item in the package. Labeling individual items will assist with physicals where parts are counted individually, not by the package.

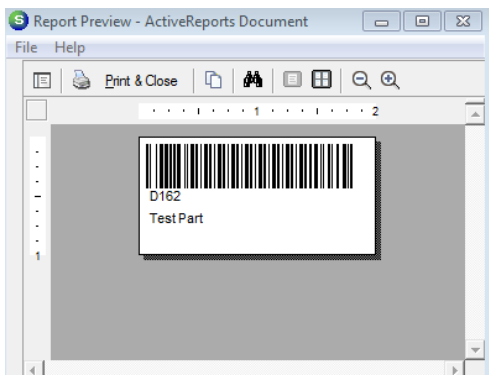
To print stock labels from an inventory receipt, open the receipt and click the Print Stock Labels button near the bottom left:



To print stock labels from the inventory part, open the part, highlight the part code, right click and select Print Stock Label:



Example Stock Label

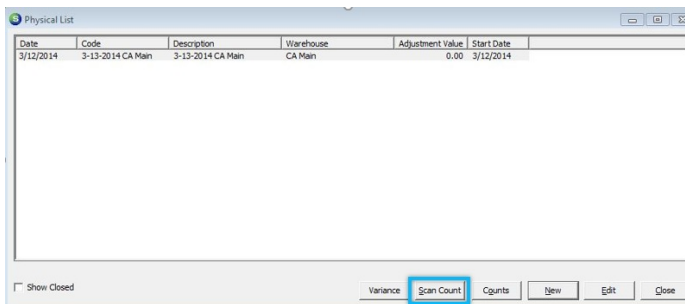


Physical Inventory

SedonaBarcode makes physical inventories easier by allowing users to create Scan Counts instead of manually printing and entering counts on sheets.

To perform physicals with SedonaBarcode:

1. Within SedonaOffice navigate to Inventory - Physical Inventory/Adjustments.
2. From the physical inventories screen, select Scan Count from the bottom list of buttons.



1. The Physical Batch Capture window will open. Walk through your warehouse with your barcode device and scan the parts for your physical inventory. Each part scanned will appear in the Physical Batch Capture window. The quantity of each part will equal the number of items you scanned for that part.

The Physical Batch Capture window displays a table with the following data:

Barcode	Type	Part	Description	Package Count	Scan Count	Extended Count	GTIN	Costing Method
036000212709	UPC-A	D162	Test Part	5	1	5	00036000212709	Standard
030000269664	UPC-A	1100RBAT	Wireless Repeater Replacement Ba...	1	1	1	00030000269664	Standard
6938818300644	UPC-A	1200	Asset Tracker Kit (beacon for gps ...	5	1	5	06938818300644	Standard
022000015280	UPC-A	1e-za431p3x	Filter for a dsl line	8	1	8	00022000015280	Standard
042167801991	UPC-A	18/6 ST OAS 500	18/6 STRANDED OAS 500'	1	1	1	00042167801991	Standard

Buttons at the bottom: Link to Existing Part, Remove, Edit Count, Save, Close.

4. If you scan a barcode that is not already linked to a part in SedonaOffice the part will still appear in the Physical Batch Capture window. It will show highlighted in red to indicate that it needs to be tied to a SedonaOffice part.

User Administrator								
Barcode	Type	Part	Description	Package Count	Scan Count	Extended Count	GTIN	Costing Method
036000212709	UPC-A	D162	Test Part	5	1	5	00036000212709	Standard
030000269664	UPC-A	1100RBAT	Wireless Repeater Replacement Ba...	1	1	1	00030000269664	Standard
6938818300644	UPC-A	1200	Asset Tracker Kit (beacon for gps ...	5	1	5	06938818300644	Standard
022000015280	UPC-A	1e-za431p3x	Filter for a dsl line	8	1	8	00022000015280	Standard
042167801991	UPC-A	18/6 ST OAS 500	18/6 STRANDED OAS 500'	1	1	1	00042167801991	Standard
054800051014	UPC-A			0	1	0	00054800051014	Standard

5. If your physical shows any red parts click on them in the list and select the Link to Existing Part button in the bottom left corner of the window. This will pull up the part search where you can search for and select the appropriate part. Bind the new bar code to the associated part following the same steps as when adding a brand new barcode.

The Physical Batch Capture window shows the same data as before, but the row for barcode 054800051014 is highlighted in red. A dialog box titled "Add GTIN for Part" is open, showing the following fields:

- GTIN: 00054800051014
- Internal Use: ☐
- Part: 1165-W
- Description: Wireless Commercial Smoke Detector
- Package Count: 1

Buttons at the bottom: Link to Existing Part, Remove, Edit Count, Save, Close.

6. After scanning all parts for the physical and binding any parts showing in red, simply select Save. The numbers from your count will be automatically added to the physical inventory Count column.
7. If any parts were forgotten, or edits need to be made the physical counts can still be manually edited. To do so highlight the physical in the physicals list and click the Counts button from the main inventory screen. Enter the needed changes in the +/- column.

Counts			
User	Count	+/-	Net Qty
Administrator	8	0	8
Administrator	0	6	6
Administrator	0	5	5

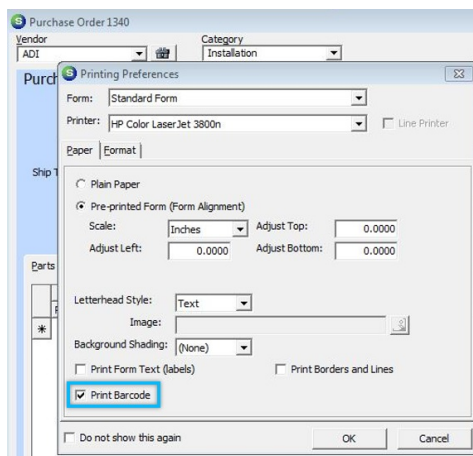
Barcodes on Forms

In addition to part barcodes, SedonaOffice can create barcodes for purchase orders, service/inspection tickets, jobs, invoices, and statements. These barcodes can be printed from SedonaOffice on the form itself, and then scanned into SedonaOffice later to automatically open that item and expedite data entry.

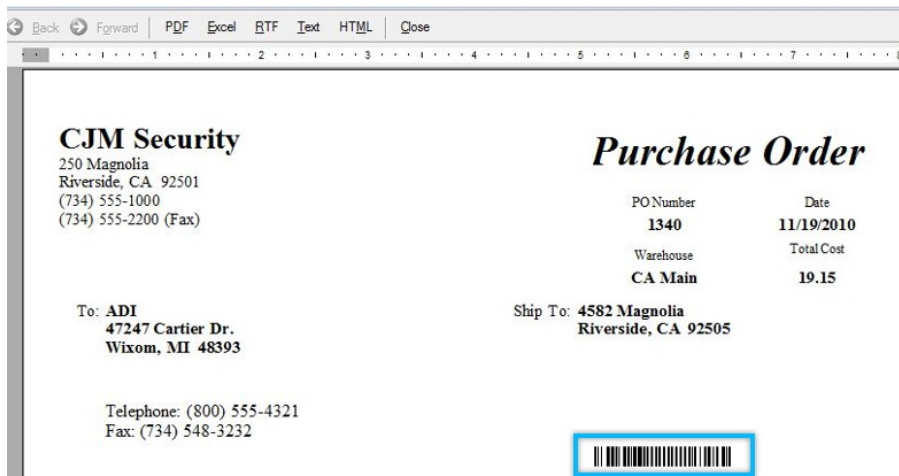
Purchase Orders

To print a barcode on a purchase order:

1. Open a purchase order and select the print preview button from the top icon bar of SedonaOffice.
2. In the printing preferences window, check the box for Print Barcode near the bottom of the first page. Then click OK.



SedonaOffice will assign a barcode to the specific PO you are printing, and print that barcode near the top right area of the form.



CJM Security
250 Magnolia
Riverside, CA 92501
(734) 555-1000
(734) 555-2200 (Fax)

Purchase Order

PO Number	Date
1340	11/19/2010
Warehouse	Total Cost
CA Main	19.15

To: **ADI**
47247 Cartier Dr.
Wixom, MI 48393

Ship To: **4582 Magnolia**
Riverside, CA 92505

Telephone: (800) 555-4321
Fax: (734) 548-3232

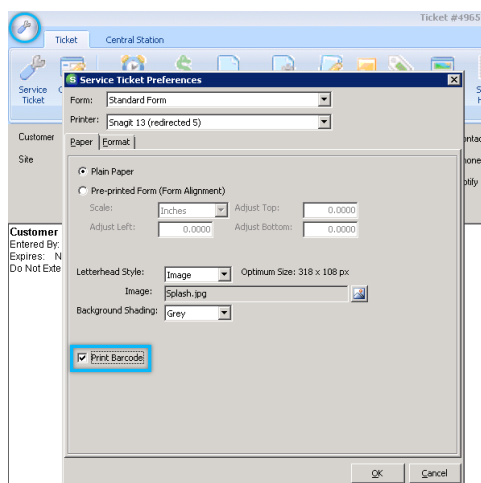


3. Print the purchase order. If you scan the printed barcode SedonaOffice will automatically open the associated PO.

Service and Inspection Tickets

To print barcodes on service or inspection tickets:

1. Open a service/inspection ticket. Click the wrench in the top left corner of the ticket and select Print to print the ticket.
2. In the printing preferences window, check the box for Print Barcode near the bottom of the first tab. Then click Okay.



SedonaOffice will assign a barcode to the service/inspection ticket and print that barcode in the top left section of the ticket.

SedonaOffice
The #1 Financial Software for Security Companies

To: 20027
Marshall Chandler
20 Mountain Rd
Cleveland, OH 44110

Administrator
on 6/27/2017 3:54:31 PM

Service Ticket - 4974

Route 001	Appointment System Account	Technician System Type
Problem Code Camera	L9387	CCTV
Panel Type UNKNOWN	Panel Location 18053	Contract # 12557
Service Level T&M-Res	Warranty Level Expired: 4/15/2011	Net Due 0.00
Secondary Account	Panel Phone #	2nd Panel Phone #

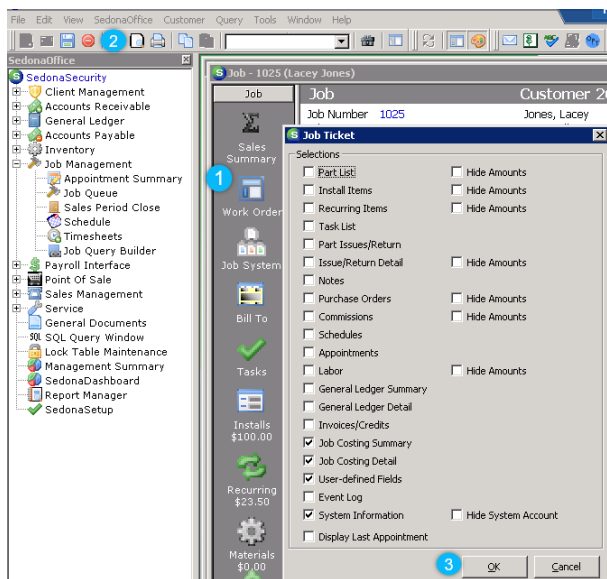
A service fee of \$115.00 applies, additional labor is billed in 15 minute increments after the first 30 minutes.
Map Code: 20558 TZ: BT
Cross Street: 18053

3. Print the service/inspection ticket. If you scan the printed barcode SedonaOffice will automatically open the service module and the associated ticket.

Job Tickets

To print barcodes on job tickets:

1. Open a job and navigate to either the Sales Summary or Work Order tab.
2. Select the Print Preview button in the top icon bar of SedonaOffice.
3. For job tickets there is no special check box for barcodes so simply click OK.



SedonaOffice will assign a barcode to the job and print that barcode in the top right area of the job ticket.

SedonaSecurity
45185 Joy Road
Canton, MI 48187
(734) 414-0760

Cust# 26422 - Jones, Lacey
Site: Lacey Jones
222 William Henry Rd
Unit 33
Canton, MI 48188
(734) 647-5387

Job Ticket

Job Number 1025	Sold Date 6/3/2015	Salesperson Matt Miller
Job Type ACC. Com	Install Company OH	Project Manager
Job Status Job Complete	System Type Access	Installer
Permit 1	Permit 2	Permit 3

System Account: **26422**

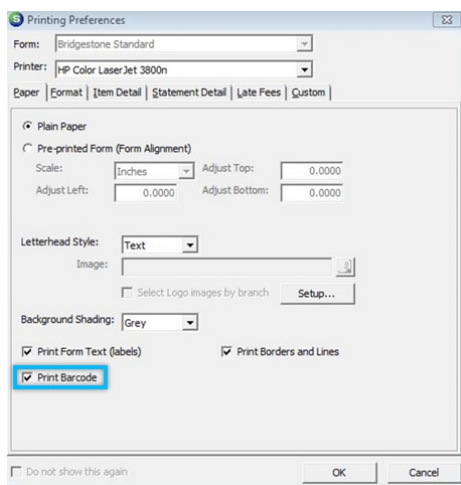
Notes:

4. Print the job ticket. If you scan the printed barcode SedonaOffice will automatically open the associated job.

Invoices

To print barcodes on customer invoices:

1. Open a customer invoice and click the print preview button in the top icon bar of SedonaOffice.
2. In the printing preferences window, check the box for Print Barcode near the bottom of the first tab. Then click Okay.



SedonaOffice will assign a barcode to the invoice and print that barcode with the remittance information near the bottom of the invoice.

Page 1

Please detach and return this portion with your payment to ensure proper credit.

REMITTANCE INFORMATION

Customer Number	10000
Invoice Number	713634
Invoice Date	11/8/2010
Due Date	11/8/2010
Invoice Balance Due	\$4,475.25
Additional Amount Due	\$97.62
TOTAL DUE	\$5,472.87

Amount Enclosed:

REMIT TO: CJM Security
250 Magnolia
Riverside, CA 92501

Sweet Afton Teahouse
420 Forest
Plymouth, MI 48170

3. Print the invoice. If you scan the printed barcode SedonaOffice will automatically open the associated invoice.

Payment Processing

If your customers send check payments with their remittance stub, the barcode on the remittance stub of the invoice can be scanned to assist with entry of the check payment. For this process:

1. Navigate to Accounts Receivable – Payment processing.
2. Select new to create a new payment processing batch. Add the basic batch info and save.
3. Highlight the batch and select Enter Payments.
4. From the blank check screen scan the barcode on the invoice remittance stub.

The system will automatically pull up the associated customer. You can then enter the check information and payment amount as normal.

Before barcode scan:

Payment Processing

Batch Tape Amount: 100.00 Amount Entered: 0.00 Batch Balance: 100.00 Entry # 1 of 1

Branch: CA

Customer: [dropdown]

Invoice #: [dropdown]

Address: [text box]

Memo: [text box]

Balance to Apply

Amount: [text box]

Payment Method: Check

Check Number: [text box]

Posting Date: 3/12/2014

Check Date: [text box]

Other Credits: [text box]

Invoices | Other |

Site Name	Invoice #	Date	Amount	Net Due	Payment

\$0.00

Auto Clear

View Checks Import Lockbox Scan Batch

Save Close

After barcode scan:

Payment Processing

Batch Tape Amount: 100.00 Amount Entered: 0.00 Batch Balance: 100.00 Entry # 1 of 1

Branch: MI

Customer: 10000

Invoice #: 713634

Address: Sweet Afton Teahouse
420 Forest
Plymouth, MI 48170

Memo: [text box]

Balance to Apply

Amount: [text box]

Payment Method: Check

Check Number: [text box]

Posting Date: 3/12/2014

Check Date: [text box]

Over 30 Days Past Due Statement Late Fee: \$3,490.41 Other Credits: 0.00

Invoices | Other |

Site Name	Invoice #	Date	Amount	Net Due	Payment
Sweet Lily Teahouse	713634	11/8/2010	4475.25	4475.25	
Sweet Afton Teahouse	713651	1/11/2011	195.00	195.00	
Sweet Mary Teahouse	714041	3/12/2011	165.75	165.75	
Sweet Rebecca Teahouse	714187	8/25/2010	36.87	36.87	
Sweet Mike Teahouse	714196	9/9/2011	100.00	100.00	

Total Due: \$4,972.87

Auto Clear

Statements

To print barcodes on statements:

1. Create a statement either through AR – Statements or by right clicking on the customer tree on the bill to address or Collections.
2. Whichever way you choose to create the statement, when the printing preferences window appears check the box for Print Barcode near the bottom of the first tab. Then click Okay.

Printing Preferences

Form: Standard Form (501)

Printer: Fax

Link Printer

Paper | Format |

Plain Paper

Pre-printed Form (Form Alignment)

Scale: Inches Adjust Top: 0.0000

Adjust Left: 0.0000 Adjust Bottom: 0.0000

Letterhead Style: (None)

Image: [text box]

Background Shading: (None)

Print Form Text (labels) Print Borders and Lines

☒ Print Barcode

OK Cancel

SedonaOffice will assign a barcode to the statement and print that barcode in the top left section of the statement.

Statements - Standard Form (S01) - SedonaOffice [Print Preview]

File Help

Print & Close

100 % 1/2

Back Forward PDF Email RTF Text HTML

Statement

 Sarah Ashley 1225 Goldenrod Lane Huntington Beach, CA 92647	<table style="width: 100%;"> <tr> <td style="text-align: right;">3/12/2014</td> <td style="text-align: right;">10004</td> </tr> <tr> <td style="text-align: right;">3/12/2014</td> <td style="text-align: right;">7,956.65</td> </tr> </table> CJM Security 250 Magnolia Riverside, CA 92501	3/12/2014	10004	3/12/2014	7,956.65
3/12/2014	10004				
3/12/2014	7,956.65				

Net Due: \$7,956.65

Sarah Ashley	10004	3/12/2014	3/12/2014
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Sarah Ashley, 1225 Goldenrod Lane Huntington Beach, CA			
8/14/2009	712551	1234567891	Service Call
		335.00	176.45

3. Print the statement. Since there is no 'edit form' for invoice in Sedona, scanning the statement's barcode will not open the associated statement. Instead, if you scan the printed barcode SedonaOffice will automatically open the associated customer.