# 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

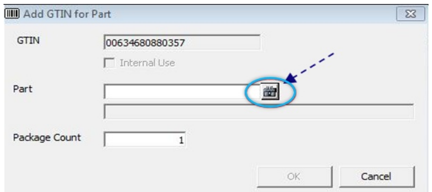
Barcodes can be used to open parts, order parts, receive parts, and perform physical inventories. Before using any of these features any part barcode you wish to scan must be bound to the associated part in SedonaOffice.

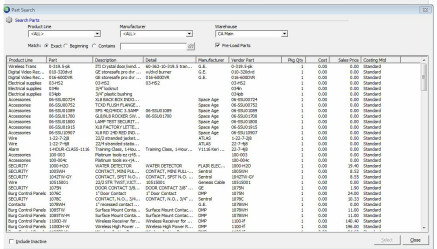
### Binding Barcodes to Parts

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.

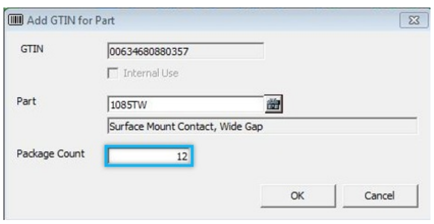
To bind a barcode to a part:

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.



4. 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.

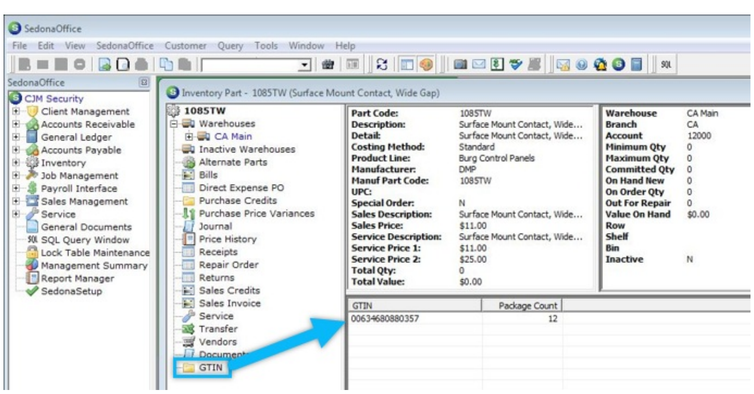



5. Select OK and the barcode will be bound to the selected part. If there are multiple vendors on a part you may save a different GTIN's for each vendor.

# 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.



# Creating Purchase Orders

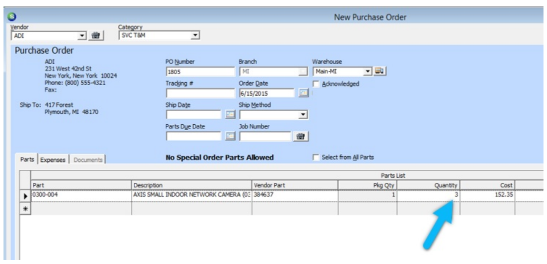
If you scan a barcode while creating a new purchase order the system will automatically add the scanned part to the PO. To do this:

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.



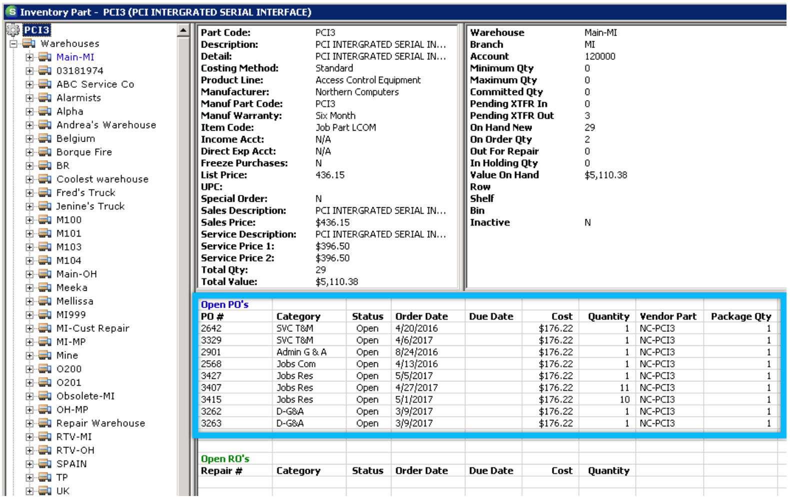

# Receiving Parts

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:

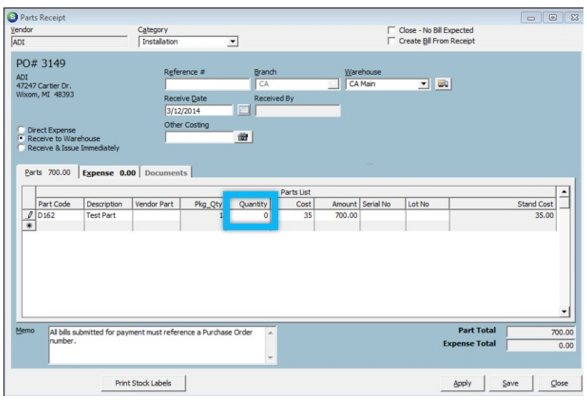
1. Scan the barcode of the part or package you are receiving. This will bring up the part in SedonaOffice and the open purchase orders list will display.
2. Find the associated PO, right click on it, and select Receive PO.

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.

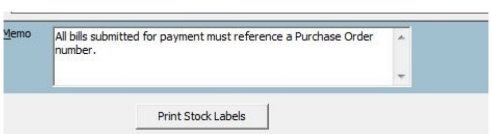



3. Manually set the Quantity to zero for all parts on the receipt.

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.



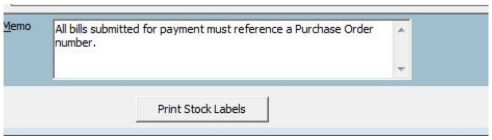

5. If you would like to print stock labels for individual parts select the Print Stock Labels button on the bottom left of the receipt. The system will print one label for each part, and/or one label for each item in a package.



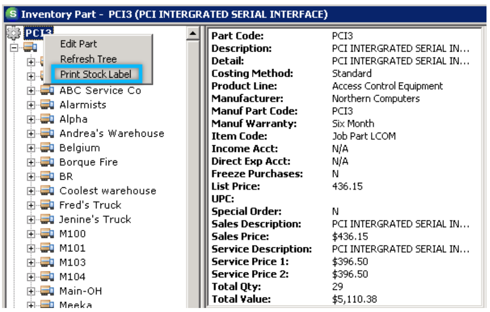

## Printing Stock Labels

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.

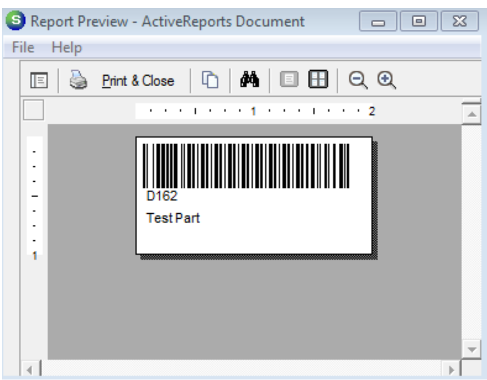
To print stock labels from an inventory receipt, open the receipt and click the Print Stock Labels button near the bottom left:




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

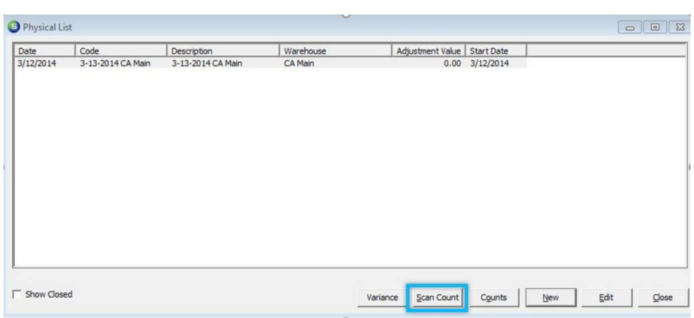



## Physical Inventory

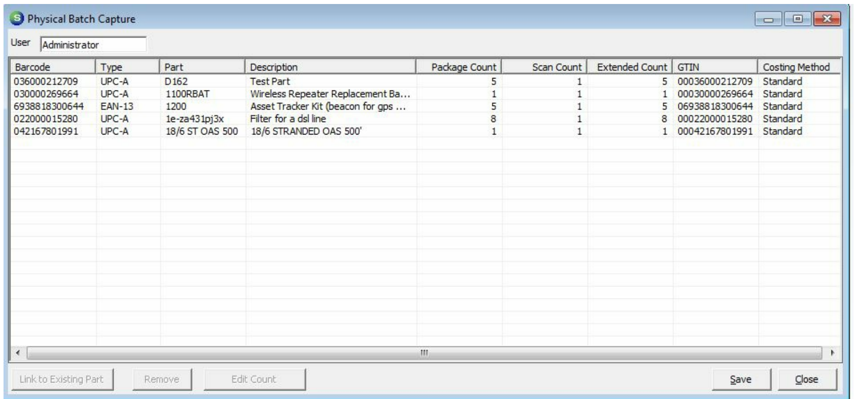
SedonaBarcode makes physical inventories easier by allowing users to create Scan Counts instead of manually printing and entering counts on sheets.

To perform physicals with SedonaBarcode:

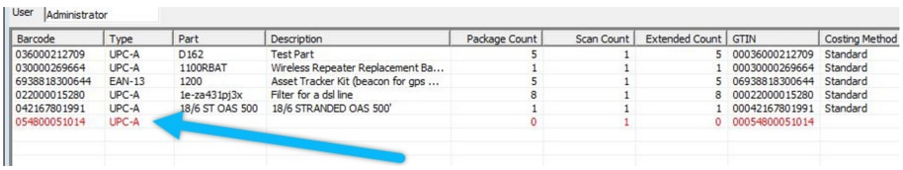
1. Within SedonaOffice navigate to Inventory - Physical Inventory/Adjustments.
2. From the physical inventories screen, select Scan Count from the bottom list of buttons.



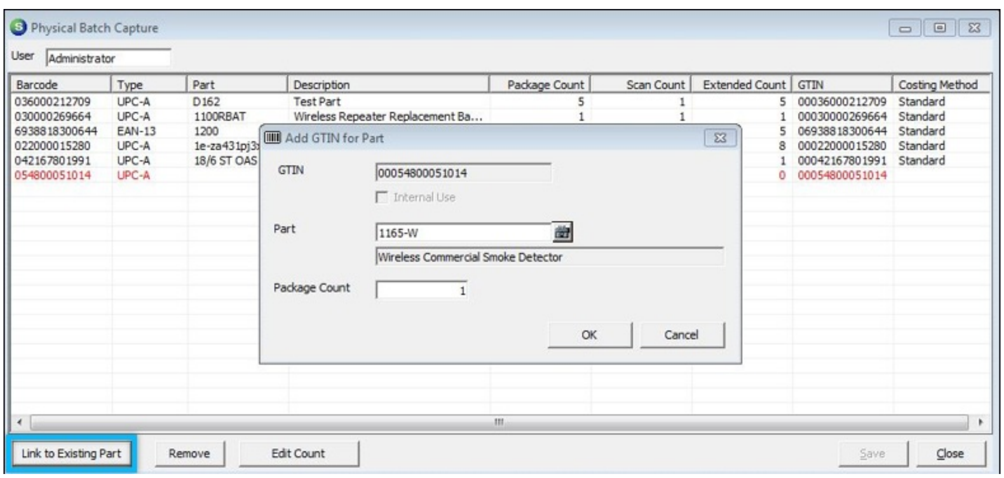
1. The Physical Batch Capture window will open. Walk through your warehouse with your barcode device and scan the parts for your physical inventory. Each part scanned will appear in the Physical Batch Capture window. The quantity of each part will equal the number of items you scanned for that part.



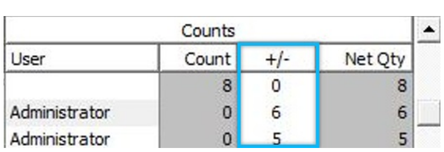

4. If you scan a barcode that is not already linked to a part in SedonaOffice the part will still appear in the Physical Batch Capture window. It will show highlighted in red to indicate that it needs to be tied to a SedonOffice part.




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.




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.



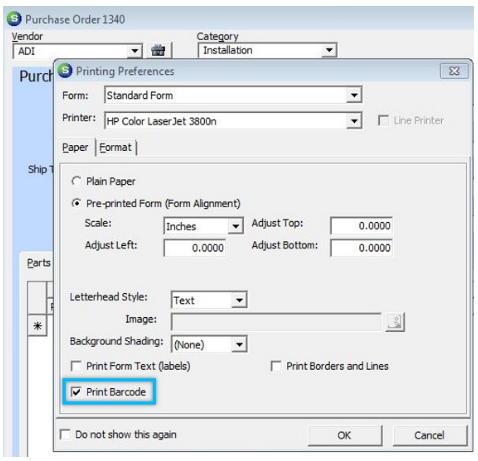
# Barcodes on Forms

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.

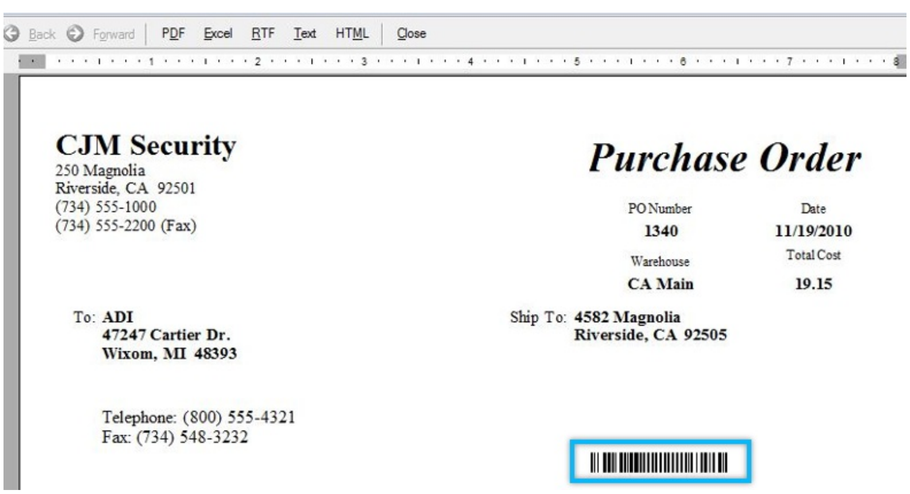
## Purchase Orders

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.

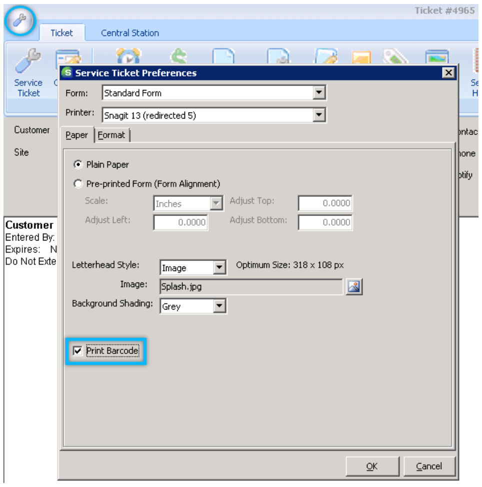



3. Print the purchase order. If you scan the printed barcode SedonaOffice will automatically open the associated PO.

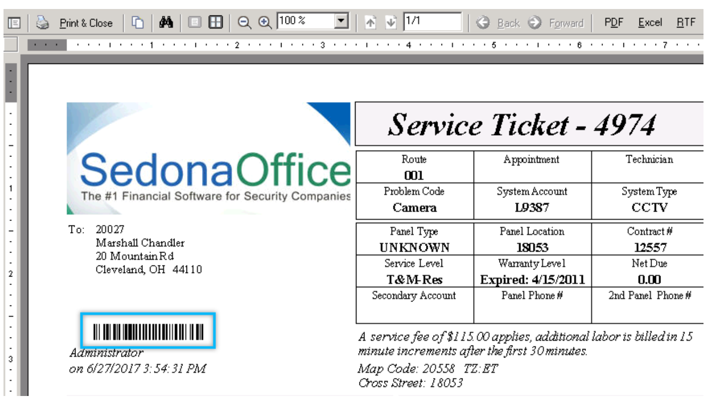
## Service and Inspection Tickets

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.

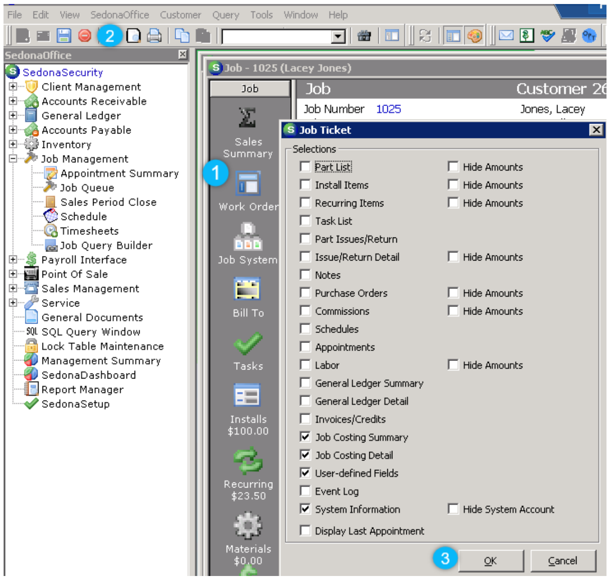



3. Print the service/inspection ticket. If you scan the printed barcode SedonaOffice will automatically open the service module and the associated ticket.

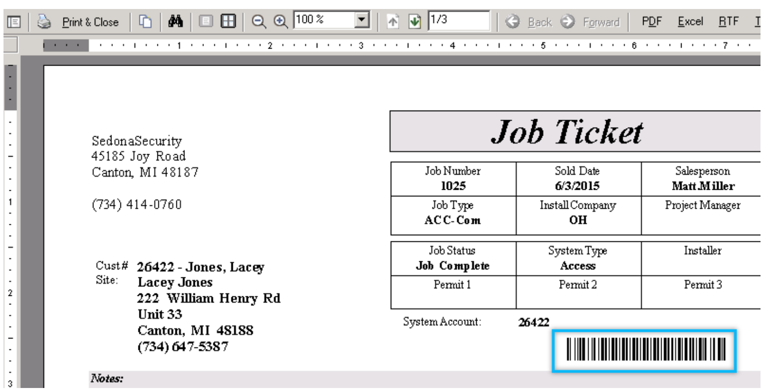
## Job Tickets

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.

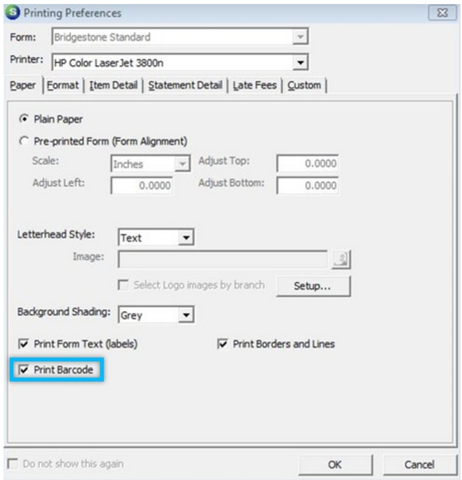



4. Print the job ticket. If you scan the printed barcode SedonaOffice will automatically open the associated job.

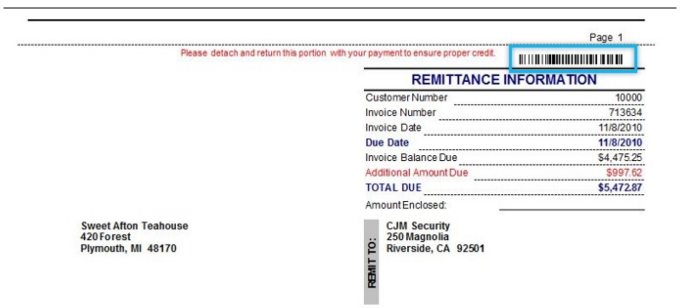
## Invoices

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.




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

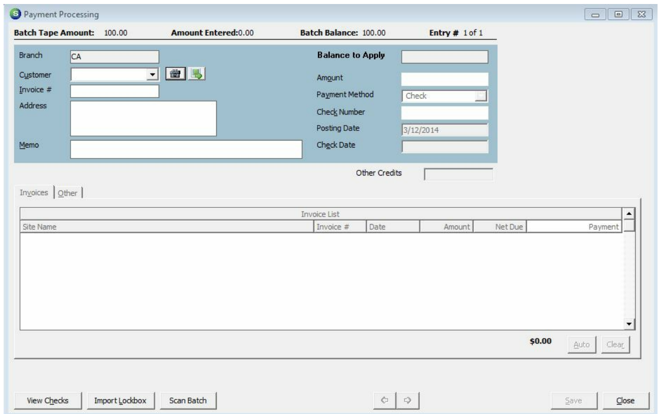
## Payment Processing

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:

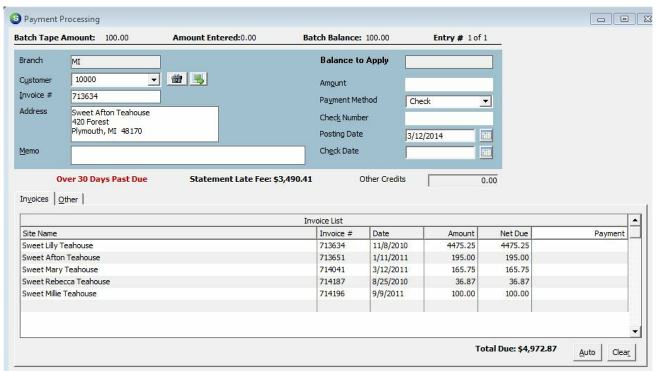
1. Navigate to Accounts Receivable – Payment processing.
2. Select new to create a new payment processing batch. Add the basic batch info and save.
3. Highlight the batch and select Enter Payments.
4. From the blank check screen scan the barcode on the invoice remittance stub.

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

Before barcode scan:



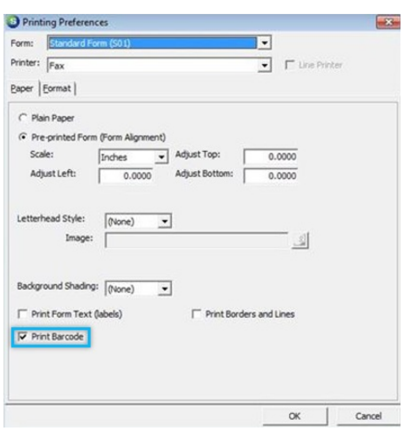

After barcode scan:



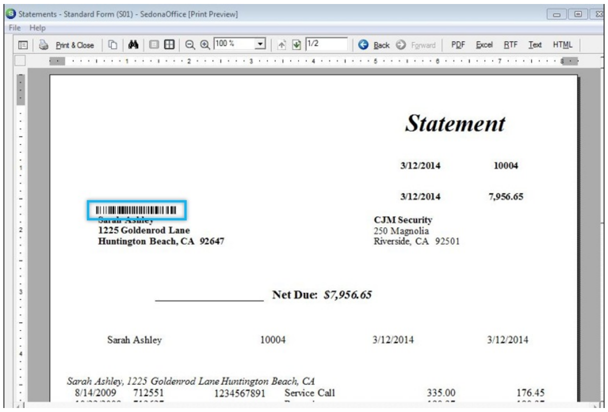

## Statements

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.




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




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