



# smartFLOW for sight™

First, you will need to be listed as one of the Contacts in Admin > General > Contacts. If your name appears in one of the drop-down fields within Contacts, you can proceed. If not, please select your name from one of the drop-down fields and save. If a change is made, you must logout and back in to see the update.

## **1. Enable Processor for SmartFlow**

- Admin > General > Location
- Open Location
- Click on Order Processing
- Select Enable beside SmartFlow
- Save

## **2. Opt into a Product Partner**

- Admin > RevolutionEHR Solutions > SmartFlow Partners
- Select Enabled beside your preferred SmartFlow Partner
- Save

### 3. Configuring the Location

You will need to enable the Processor for each location where you plan to place SmartFlow orders.

- Admin>Vendors/Partners>Contact Lens Suppliers
- Click the + button to add vendor if already listed (open)
- Beside Name type in the name of the vendor (if already listed go to next step)
- Select Vendor from External ID
- Save
- Click on Location Information tab
- + ADD
- Select Location from drop down
- Enter Account Number and External/Ship-To# and Save.

#### New Location Configuration



Location \*

Account #

External/Ship-To #

Username

Password

Cancel

Save

**\* External/Ship-To # will come from your vendor. Repeat these steps for each location.**

#### **4. Adding SmartFlow ID's**

If your contact lenses have been imported a SmartFlow ID will automatically be associated.

For any manually added contact lenses you will need to edit them in Inventory>Products to associate a SmartFlow ID

Click in the SmartFlow ID Tab and type the name of the lens and select the correct brand followed by save.

Once all steps have been completed you will want to log out of RevolutionEHR and back in before placing orders.

Details

Options

Inventory

## Product Information

Catalog Practice

Category Contact Lenses

Lens Type \*  Soft  RGP  Hybrid

Manufacturer \* Bausch and Lomb

Brand - Select Brand -

Collection - Select Collection -

Model \* BioTrue One day for AST

Code/HCPCS Search for HCPCS Code

SmartFlow ID Search for SmartFlow ID

Invoice Desc.

Sales Rep - Select Sales Rep -

Click in the SmartFlow ID Tab and type the name of the lens and select the correct brand followed by save.

Once all steps have been completed you will want to log out of RevolutionEHR and back in before placing orders.

## 5. Placing SmartFlow Orders & Batching

When creating an order, you will need to select SmartFlow as your processor, along with the vendor partner, your desired quantity, and the packaging.

**Supplier**

Processor

Name

Account #

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**Product Options**

<input type="checkbox"/> OD	<input type="text" value="1"/> Quantity	<input type="text" value="6 Lens Pack"/>	<input type="checkbox"/> OS	<input type="text" value="OS=OD"/>	<input type="text" value="1"/> Quantity	<input type="text" value="6 Lens Pack"/>
	<input type="text" value="Select Color"/>			<input type="text" value="Select Color"/>	<input type="text" value="Select Color"/>	

Those are the only required fields to approve and transmit the order. Once you click Transmit, your order has been sent.

For Batching, leave your SmartFlow orders in the Approved Status. When you are ready to submit, navigate to the Orders module.

Choose the appropriate filters to search for all Approved SmartFlow orders that are ready to submit to a certain vendor.

Click the checkbox to select your orders and then click on change status.

The pop up window will display your order numbers and ask you to change them from approved to transmitted. This will send all selected orders.

Here is a training video that will go over how-to batch:  
[https://www.youtube.com/watch?v=IhN1uO0J\\_2E&feature=youtu.be](https://www.youtube.com/watch?v=IhN1uO0J_2E&feature=youtu.be)