

Release Notes

New Features & Enhancements

- ★ **Icons:** VisionPro with a New Look. New Icons & New Menu
- ★ **Report:** End of Day: Added two new sections a) Credits Applied b) Insurance Claimed
- ★ **Invoices:** Ability to print the Payment Date on Invoice.
- ★ **V Codes:** Ability to specify V-Codes or Item codes for all Inventory items. Add new system preference to print the V-Codes on the Invoices.
- ★ **Lab Order Status:** Added a functionality to automatically complete the lab order if an Invoice is marked complete.
- ★ **Convert Lab Order to Invoice:** Ability to convert the stand alone lab order into an Invoice.
- ★ **Purchase Order:** Ability to edit the quantity on the Purchase order screen. The user can now modify the quantity of an item even after selecting the items from selection screen.
- ★ **E-Mail Attachments:** Ability to email Patient attachments.
- ★ **E-Mail RX:** Ability to email Patient prescriptions.
- ★ **E-Mail Invoice from lookup:** Ability to email Patient Invoice from the lookup screen.
- ★ **Support Subscription:** Ability to check number of days support left with VisionPro.
- ★ **Calendar Time Slot:** Ability to define a default time slot for Calendar. Added a new system preference to define a time slot of 5, 6, 10, 15, 30 or 60 minutes for calendar appointments.
- ★ **Calendar Non-Patient Appointments:** Ability to save patient's cell phone number.
- ★ **Calendar Tool-Tip:** Ability to show all Patient Phone numbers in tool tip.
- ★ **Purchase Order Item Search:** Ability to find purchase order containing certain item.
- ★ **Company Logo on Double Invoice:** Increased the company logo size to match the invoice size.
- ★ **Patient Chart Email:** Changed the background color of E-mail field to make it more prominent.
- ★ **Spectacle Order Return:** Ability to return the individual item or return the entire spectacle order. The user can return the items of from Spectacle Order even if the Invoice or Lab Order is marked complete.
- ★ **Contact Order Return:** Ability to return the individual item or return the entire contact order.
- ★ **Export Inventory to excel :** Ability to export all of your inventory items including Frames, Lens, Contact lens, Lens Treatments, Services & Accessories into an excel spreadsheet.
- ★ **Export Patients:** Added a new functionality within Marketing section to export selected or all patients into an excel spreadsheet.

- ★ **Patient Labels:** Added new features at various sections of the application to print patient labels including Recall & Marketing Letter section. This will allow the business to create marketing letters for the selected patients and an ability to print their labels at the same time.
- ★ **Lab Order Template:** Added a new lab order template with the patient details info. Added place holders on the lab order for Lab Order tracking number and Final Inspection.
- ★ **Invoice Numbering:** Ability to start the Invoice from a specific number. This feature allows the business to continue using the invoice numbers sequence from old system.
- ★ **Marketing Query:** Added following new query filters in marketing letter and promotion section:
 - Age Range
 - Invoice Date Range
 - Recall Date Range
 - Birthday Date Range
 - Patient Total Sale Range
 - Frame Brand Sold
 - Lens Brand Sold
 - Treatments Sold
 - Doctor
- ★ **Import:** Ability to import Inventory V-Codes & Supplier UPC Code for all Inventory items. Ability to import **Lens Treatments & Services** into VisionPro.
- ★ **Cancel Return Order:** Ability to cancel the return order. Selecting this option will automatically revert the inventory quantity.
- ★ **Marketing Email Attachments:** Added a new feature to send attachments along with our marketing letter and promotions.
- ★ **Return Order - Supplier Invoice References:** Added a new feature to attach multiple supplier Invoice numbers to the return order items with click of a button. The user can now select the supplier's Invoice Numbers from within the item history to attach it to the return order item.
- ★ **Letter Template Undo and Redo buttons:** Added Undo and Redo buttons in marketing letter editor toolbar.
- ★ **Inventory Search by V-Code/Item Code:** Ability to search the items by V-Codes/Item Codes.
- ★ **Product Category on Invoice:** Added a new system preference to show or hide the product category on the Invoice receipt print out.
- ★ **Customizable Inventory Types Labels:** Added a new system preference which will allow the business to display customizable labels for Frames, Lens, Contact Lens, Accessories, Lens Treatments and Services. The user can now even customize the label in any language e.g. French, Spanish etc.
- ★ **Contact Lens Color:** Ability to change the color of contact lens in contact lens order form.
- ★ **Reports:** Additional reports have been added in report section. Following is the list of reports that have been added in this version:
 - Enhancements
 - a) **Insurance Invoice Summary:** Ability to filter on Insurance company.
 - b) **End of Day:** Ability to filter on User
 - c) **Summary Report:** Ability to filter on User

New Reports
Sales & Payments

- End of Day (EOD) (**New Sections**)
- End of Day Items Sold (**Redesigned**)
- Detailed Invoice sales (**New**)

Inventory

- Contact lens Orders (**New**)
- Spectacle Orders (**New**)
- Best Selling (**New**)
- Worst Selling (**New**)

User / Employee

- Appointments (**New**)

Practice Analysis

- New Patient Seen (**New**)
- Detailed Profit (**New**)

★ **Patient Order**

VisionPro has added a new feature that will keep track of all the items that needs to be ordered. This module of VisionPro will track all the Frames, Lens and Contact Lens items that needs to be ordered from their respective suppliers. Given below are the benefits and features of patient order module:

- Order Frames, Lens and Contact Lens
- Track your orders with custom status.
- Ability to mark the items BACK ORDERED
- Updates the inventory automatically as soon as the order is received
- Update the profit calculation for individual order based on the supplier cost
- Print **Patient Order Slips** with supplier, account info and other required details to send it to the supplier
- Ability to print, email and fax single or multiple orders to supplier
- Ability to export orders into an excel sheet

★ **Lab Orders Lookup by Tray:** Ability to search the lab order by tray number.

★ **Supplier UPC:** Ability to store and search on supplier UPC codes across the entire applications including Inventory, Invoice, Physical Count, Purchase Order, Return Order & Transfer Order sections.

★ **Physical Count Tool Tip:** Ability to show inventory properties e.g. Frame Color, Color Code etc. in the Tool Tip when performing the physical count.

★ **Physical Count by Supplier & Brand:** Ability to perform Physical Count for the selected Supplier or a Brand.

★ **Split Commission on Invoice:** Added a new feature that will allow the business to specify the user when selling an item in an Invoice. This will track sale and commission on the basis of each item sold. This will allow the business to split the commission of one sale between multiple users.

★ **Security on Discounts and Promotions:** Ability to define the security access on Invoice Discounts and Promotions to group of employees. With this the business can authorize certain employees who can apply discounts and promotions on the Invoice.

★ **Thermal Receipt:** Visionpro had added a new Invoice template to allow you to print the Invoice on an

80mm wide thermal receipt printers. You can use any thermal receipt printer. For further info on where to buy kindly contact VisionPro Team.

- ★ **Keyword search for Frame and Lens in Spectacle Order:** Added an ability to type the frame model or lens description directly on spectacle order screen to perform the selection. By hitting the enter key on keyboard will select the item automatically. If exact match is not found the system will open a selection screen with matched frame or lens for selection.
- ★ **Glasses & Contact Lens Recommendations:** Added a new functionality to record the doctor's recommendation on the Glasses and contact lens RX screen. This will be used to dispense Lens or Contact Lens by the sales person by selecting the "Show Recommendation" checkbox when doing the selection.
- ★ **Physician to Doctor:** Replaced the keyword Physician by Doctor in the entire application.
- ★ **Doctor Or Optician Name:** When adding a new Doctor or Optician, either the First Name or the Last Name is mandatory.
- ★ **Patient Details:** Rearrange the fields to make it more readable.
- ★ **Glasses RX Types:** Ability to categorize the RX into Standard Rx, Distance Rx, Reading Rx or Multifocal Rx.
- ★ **Suppliers:** Supplier Type selection has been made mandatory.
- ★ **Spectacle Order Treatments:** Redesigned the treatments selection screen under Spectacle Order to match with rest of the selection screen. This screen will now provide an ability to select quantities, Tax and User when adding the treatment to the spectacle order.
- ★ **Lens Treatments:** Ability to delete Lens Treatment under Lens Treatment section.
- ★ **Frame Inventory Properties:** Rearranged the Frame properties for better usability.
- ★ **Barcode Labels:**
 - a) Updated all the labels to work out of the box with Datamax E-Class Mark III Printer
 - b) Added barcode and other frame properties to print on 5167 label
 - c) Added TT345 and TT361 labels i.e. Dumbbells and Rat Tail style labels
 - d) Standardize all the barcode labels to display specific information.
- ★ **Patient Lookup by Date of Birth:** Added date of birth search criteria on patient lookup screen.
- ★ **Return Reason on Invoice:** Added a system preference to show / hide the return reason on the Invoice.
- ★ **Company Website:** Ability to enter longer website URL's with special characters

Issues

- ✓ **Invoice Discount %:** Getting an error when giving Invoice Discount in percentage
- ✓ **Supplier Cost and Landing Cost security in Purchase Order Tooltip:** Added a security on the tool tip so that user cannot view Supplier Cost and Landing Cost of an Item if the user does not have Read access to the cost prices.
- ✓ **Workdesk > Inventory > Barcode** link was broken. The user was unable to open the Barcode Label Screen from Inventory Icon on the Workdesk
- ✓ **City, Province & Country:** Ability to edit the cities, province and country information of core data was not working for the city other than the company city.
- ✓ **Prism value on Spectacle Lab Order:** The Prism values under Rx section was not printing on the lab order.
- ✓ **Pending Payments Report:** Modified the report to not include the invoices with Used Insurance Credit.
- ✓ **Error Report:** Ability to send the error report manually was not working.
- ✓ Relation option in Patient Chart has been renamed to Relationship.
- ✓ Selecting the Cancel button when Returning the item in an Invoice will not return an item.
- ✓ **Patient Labels:** Removed the extra space between name and address.
- ✓ The user was unable to return the items in a Contact Lens Order.
- ✓ Under Spectacle Order, Rx was not getting refreshed when selected again from the RX selection screen.
- ✓ Company Website has been moved above the solid line on the Invoice Printout.