# VisionPro POS

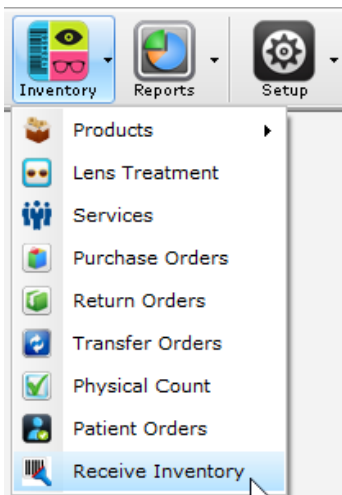**Version 15.01.01**

Release Notes

New Features & Enhancements

★ **Global Payment (X-Charge) Payment processing**: VisionPro payment processing interface allows our customer to process all major credit card and debits card from within the application. This will allow our customers to process the payment fast and securely using X-Charge payment gateway.

★ **Gift Cards:** VisionPro is introducing a new module which enables you sell Gift Cards to your clients. You will have an option to either use pre-printed gift card or print on paper using regular printer. You clients can now purchase a gift card for their friend and family which can be redeemed at any time towards any purchase.
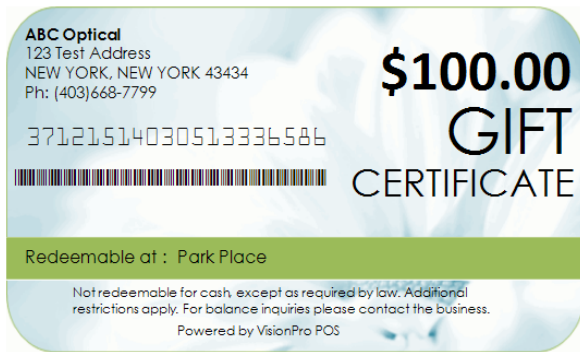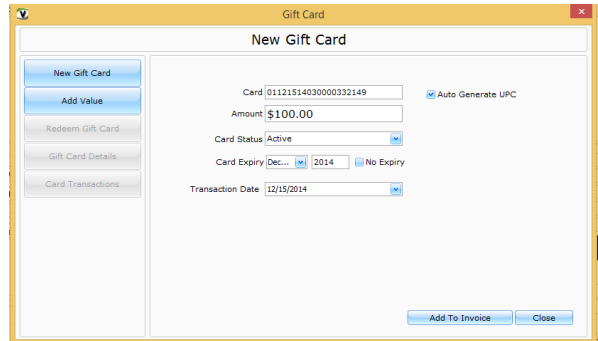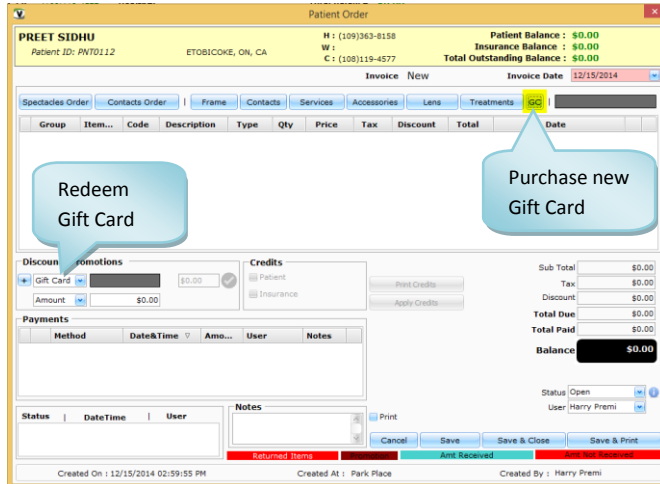
★ **Receive Inventory:** Ability to receive inventory items directly without creating Purchase Orders. With this module the business can receive all existing and new inventory items including Frame, Lens, Contact lens & Accessories.

★ **Visual Acuity:** Ability to store Visual Acuity values with and without Rx in either feet or meters. The business can even recode the Chart used and mark all the values to "Normal" if required.

★ **Login Screen:** VisionPro login screen has a New Look with bigger fields and fonts. The business will all receive important notifications related to their account upon login.
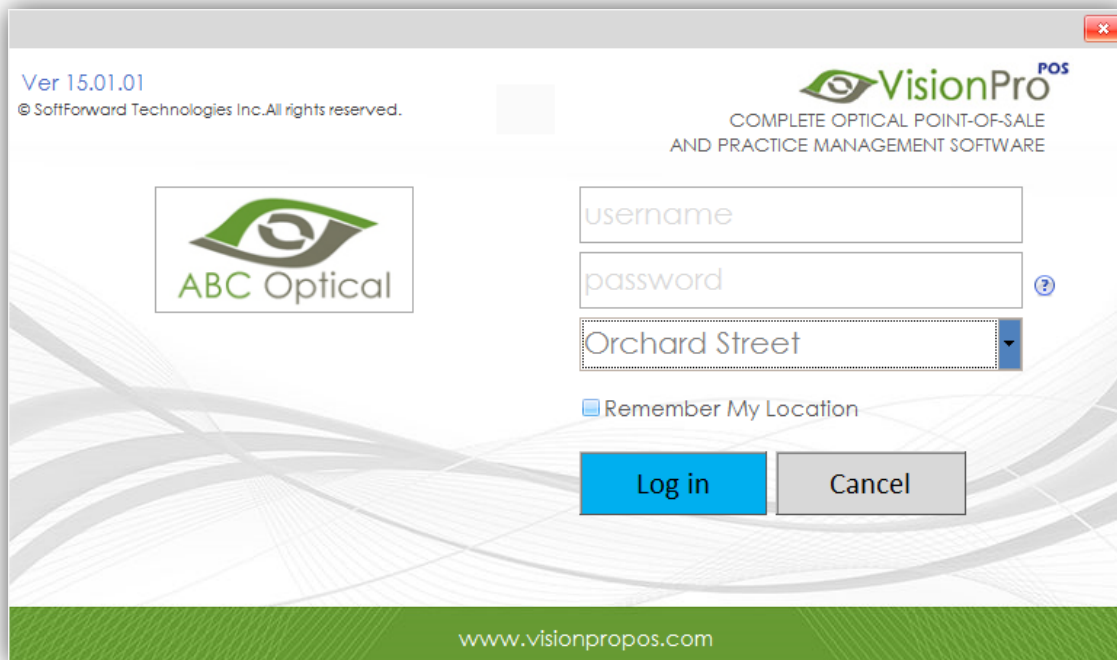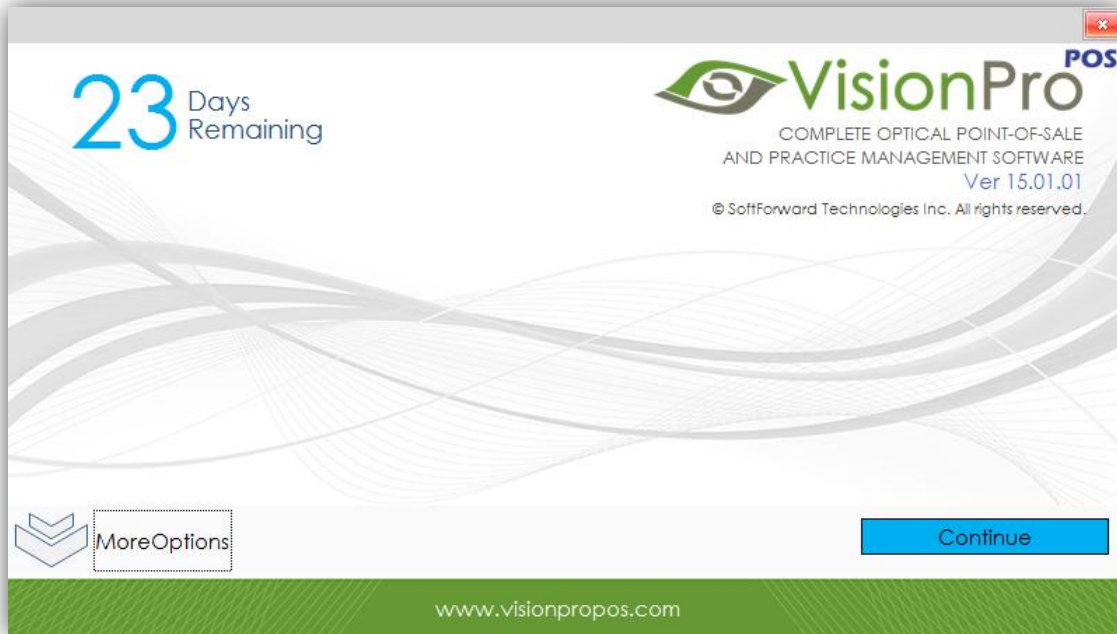
★ **Scheduler**: Ability to block a time range for a user and define user availability by settings various criteria's.

Setup > Users > Edit User > Account Information > **Block User Availability** > Add

★ **Inventory Multi-Edit** : Ability to select multiple Inventory items and update Supplier, Brand, Markup Multiplier, Item Discount (amount or percentage), List Price and Quantities of the selected items.

★ **Inventory Item Discount / Sale:** Ability to set discounts for an individual inventory item in either amount or percentage. The discount will be automatically selected and applied on the invoice.

★ **Transfer Patient:** Ability to transfer a Patient from one location to other. The patient demographics will be transferred over to other location but the previous sales will not be effected and will remain same for the previous location. The other location will be able to see the entire history of that patient.

★ **Transfer Orders Enhancements:** Visionpro will now have an ability to track quantities of the transfer order items along with their reason and status of individual item. You can also generate a report based on number of different criteria's. Visionpro will also add a transaction in the item history section for that item recording when it was transferred and when it was received.

★ **Spectacle Order Rx type Auto-calculation:** Ability to automatically calculate and convert a Standard Rx to Reading, Distance or Computer Rx while adding the Rx to a Spectacle Order.

★ **Quick Sale PO Frame:** Ability to add Material, Color, Color code, Rim type and Shape while entering a Patient owned frame in Quick Sale.

★ **Received Barcodes:** Ability to print barcodes only for received items in a Purchase order.
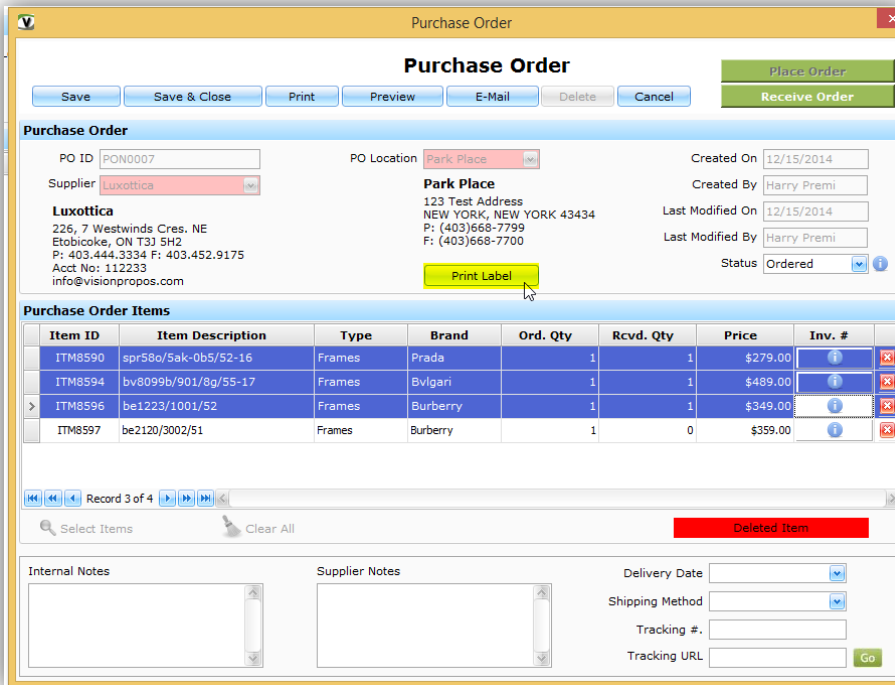
★ **Email Log:** Ability to keep a log of all outgoing emails.
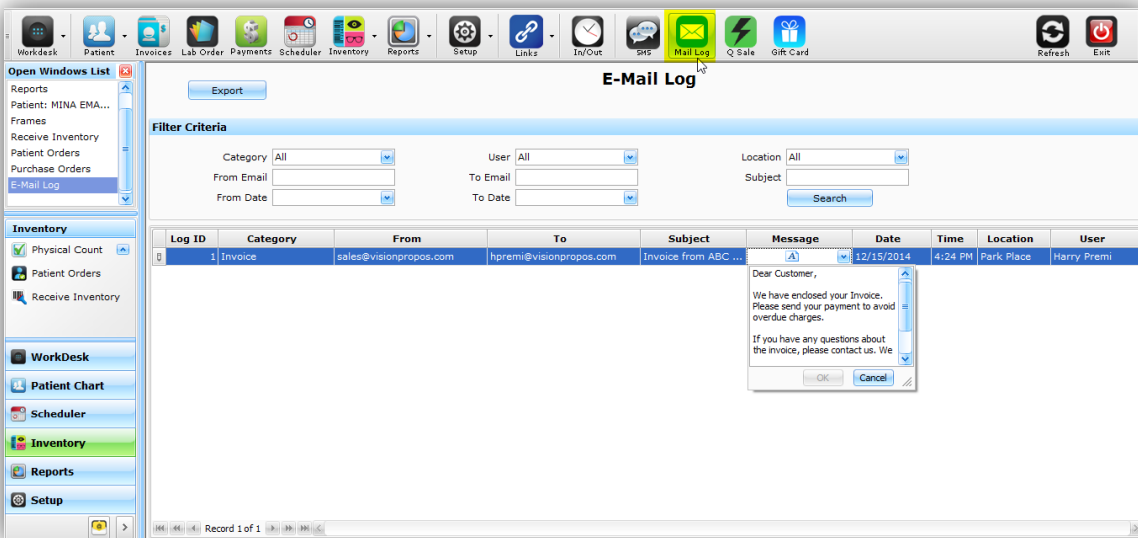
★ **Lens Group:** Added a Lens Group field to Lens Inventory.

★ **Invoice Notes:** Ability to print the notes entered by a user on the Invoice Report.

★ **Rx Auto-calculation:** Ability to disable auto-calculation of DPD, NPD for OD, OS and OU under System Preferences.

★ **Rx Selection:** Ability to filter and select a Rx by Rx type while creating a Spectacle Order.

★ **Email Address Alert:** Ability to show an alert if the user tries to save New Patient information without adding Email address.

★ **Mobile Number Alert:** Ability to show an alert if the user tries to save New Patient information without adding Mobile Number.
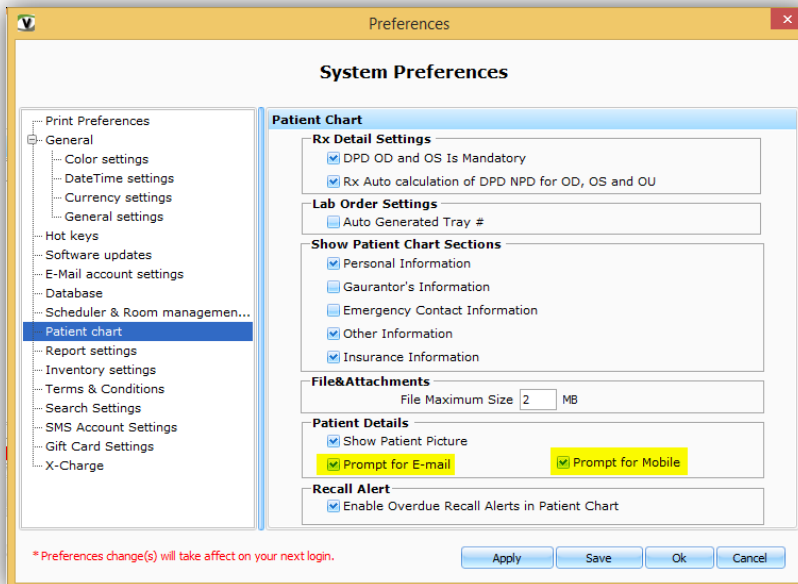
★ **Promotion Edit:** Ability to edit a Promotion amount while applying it in an invoice. Ability to define security rights to grant a user permission to edit a Promotion amount.

★ **Barcodes List price with or without tax:** Ability to print list price on the barcodes including tax amount or excluding tax amounts.
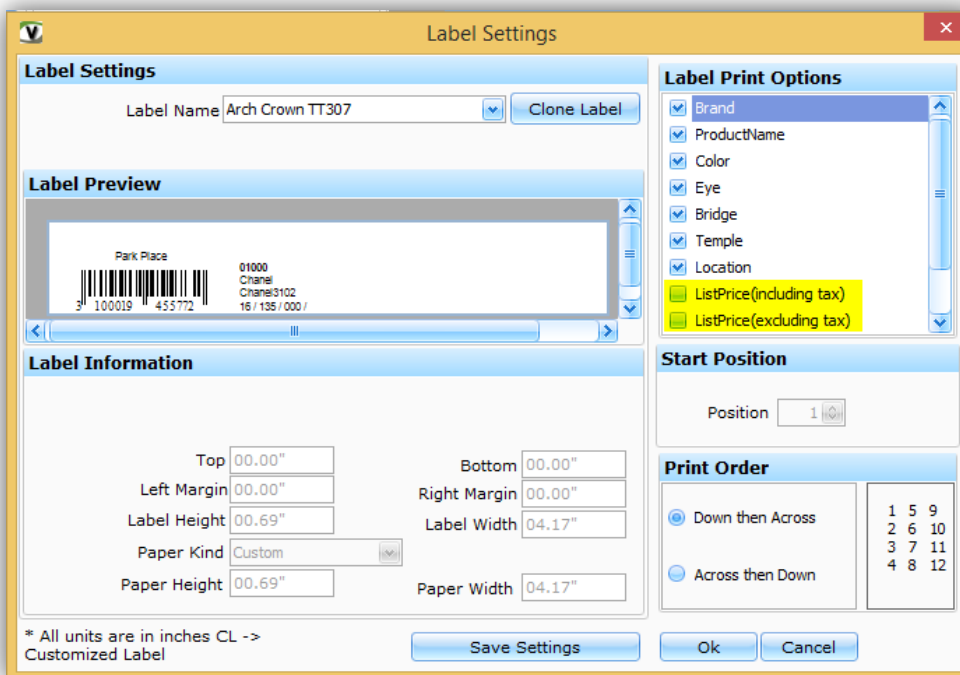
★ **Lab Order SMS:** Ability to send a text message to clients from Lab Orders lookup screen when their order is ready for pick-up.

- ★ **Undo a Void:** Visionpro will allow users who has rights to undo an invoice. This will reverse the VOID action on the invoice. *Note: All the X-Charge payments will not be reversed.*
- ★ **Rx Label:** Ability to print a Rx on a small Patient Label size paper. This is a great feature if you would like to print the Rx on patient label and stick it to the back of your business card or on the Invoice.
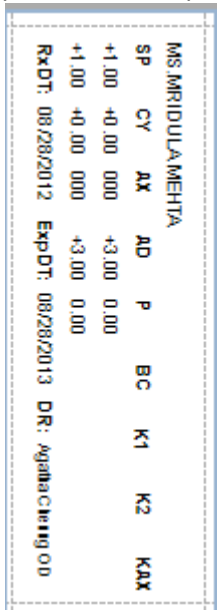
- ★ **Product Security:** Ability to define security rights for adding and editing inventory items in VisionPro.

- ★ **Payment Notes:** Added 'Notes' field in Patient and Insurance Payments section. Ability to print notes entered in End of Day reports.

- ★ **Date Override:** Ability to define security rights to grant a user permission of changing dates for Invoices, Lab Orders, Items and Payments.

- ★ **Customize Labels:** Ability to customize various label names in VisionPro according to user requirements. Eg: OD, OS, OU can be changed to R, L, B in patient Rx section.

- ★ **Manual Physical Count:** Ability to search an inventory item from grid view and add each individual frame one by one.

- ★ **Email Subject:** Ability to set a subject for each email that goes out from VisionPro.

- ★ **Company Logo:** Ability to limit the size of Company logo.

- ★ **SMS Templates:** Added few default SMS templates.

- ★ **Import:** Ability to check Eye, Bridge, Temple and Frame Color code when checking for duplicates while importing frames.

- ★ **Void Print Preview:** Ability to show a void status and void reason on a voided invoice print report.

- ★ **Tray Label Template:** Added a new Tray Label template.

- ★ **Email from Lab Orders:** Ability to send an email to Patients from Lab Orders lookup screen to notify them for pick-up.

- ★ **Patient Age in Lab Order report:** Added a System Preference to show or hide Patient Age in Lab Order Print report.

- ★ **Edit Contacts Rx:** Ability to edit Rx in Contact Lens order.

- ★ **Patient Chart from Invoice Lookup:** Ability to open a Patient Chart directly from Invoice lookup screen.

★ **Reports**: Additional reports have been added in report section. All the reports have been redesigned making them compact and printer friendly.

Following is the list of reports that have been added and enhanced in this version:

New Reports & Enhancements

Patient Chart

- Account Statement **(New)**

Sales & Payments

- Insurance Invoice Detailed **(New)**

- End of Day Items - Returned **(New)**

- Gift Card - Transactions **(New)**

- End of Day - Invoices **(Redesigned)**

- Invoices Sales Summary **(Redesigned)**

- Sales Summary **(Redesigned)**

- Payments Received **(Redesigned)**

- Pending Payments **(Redesigned)**

- Insurance Invoice Summary **(Redesigned)**

Inventory

- Transfer Order Report **(New)** - Ability to generate a report based on locations, date range, status, reason, item status, item ID, item description and user.

- Inventory Count **(Enhanced)** - Ability to filter by Frame Group. Ability to show Cost Price of Inventory items. Ability to show Supplier and Brands according to the Inventory type selected.

- Inventory Audit **(Redesigned)**

Practice Analysis

- New Patient Seen **(Enhanced)** - Ability to show Home Phone, Work Phone, Mobile Phone numbers along with Email address.

- Patient Referrals **(Redesigned)**

- Profit Summary **(Redesigned)**

- Monthly Estimates **(Redesigned)**

★ **Inventory Picture:** Ability to show the item picture on Selection screen, under Inventory Lookup, Invoices and Orders.
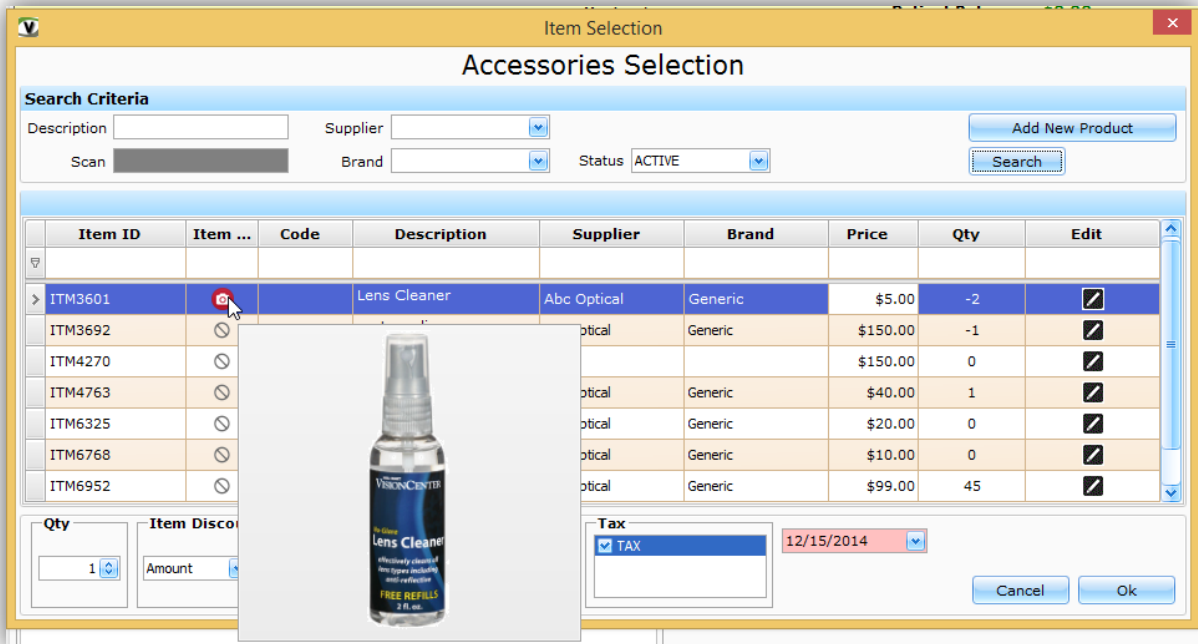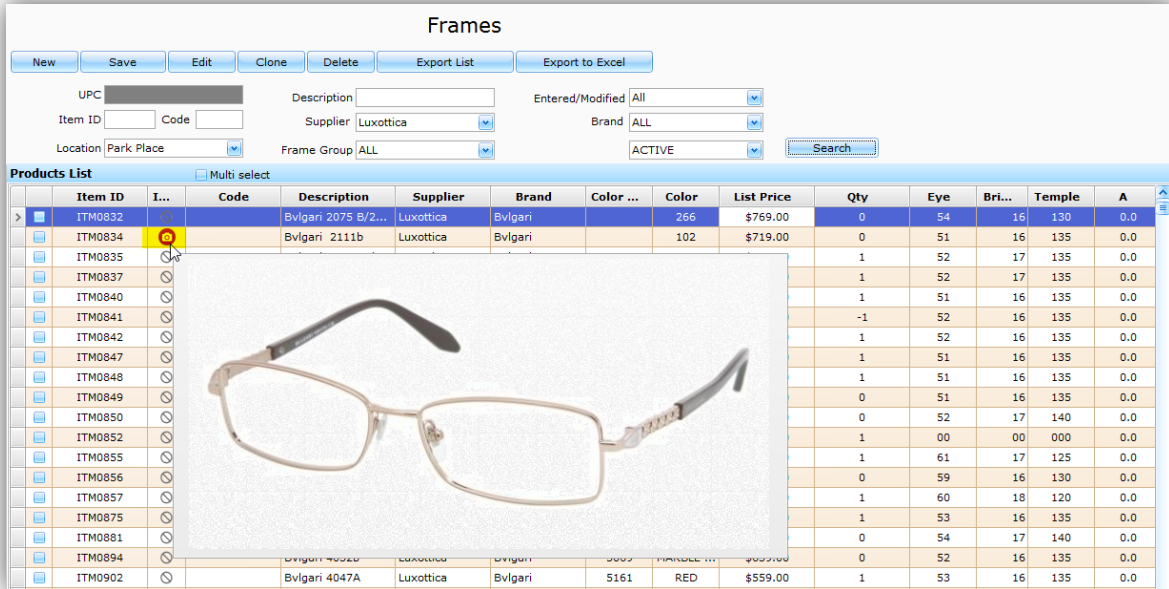
★ **Edit Time Slot:** Ability to edit time slot of a user and also to export the time slot of users.

★ **Clear SMS Log:** Added a System Preference to define a period to keep the SMS log after which it gets deleted.

★ **Scan & Add item:** Ability to add an item in Purchase Order, Return Order and Transfer order by scanning it.

★ **Supplier by Type:** Ability to lookup for Supplier by Supplier Type.

★ **Count of Trial Contacts:** Added a System Preference to choose whether to maintain an inventory count of trial pair of contact lens or not.

★ **Invoice Lookup by Patient ID:** Ability to lookup for an Invoice using Patient ID.

★ **TT364 Font Size:** Increased the font size for TT364 Barcode label.

★ **Services:** Remove Return button for Services in an Invoice.

★ **Service Promotion:** Ability to create a Promotion for all or specific service.

★ **Patient Orders:** Ability to receive Partial quantity of items in a Patient Order and then later receive remaining items.

★ **Patient Age:** Ability to show Patient Age in tool-tip on Lab Order lookup screen.

★ **Delete Purchase Order Items:** Ability to delete the items in a Purchase Order even after the order has been placed. Ability to strike the items and mark them deleted without removing from the list, for auditing purposes.

★ **Price on Lab Order Report:** Ability to show or hide item prices in a lab order report.

Issues

✓ **Patient Appointments:** Ability to select the logged in location for showing the patient appointments.

✓ **Invoice Details:** Created On, Created At and Created By showing last date modified instead of created information.

✓ **Print Appointments:** Clicking on Print Appointments under Scheduler will show only the available users for the selected location.

✓ **Insurance Refund:** Applying an insurance refund while voiding an Invoice does not give an error.

✓ **Date Modified:** Updates Date Modified field for an Inventory item when its Physical Count is done.

✓ **Date Time modified:** Updates Date Time modified whenever a user updates an Inventory item from anywhere in the application.

✓ **DOB Verification:** While importing Patients, verification will throw an error if the Date of Birth is, for eg. 01/01/1900

✓ **Schedular Default Time slot:** Schedular will now pick the time slot from System Preferences.

✓ **Deceased Date:** Checking the deceased checkbox in a Patient Chart will not ask for deceased date.

✓ **Email Import:** Checks for a valid email address while importing.

✓ **Object Reference error:** Does not show an Object Reference error when the computer is not connected to internet.

✓ **Frame Bridge error:** Does not give an error message when entering incorrect bridge value for a frame under Spectacle Order.

✓ **Patient Label:** Showing Patient age on a Patient label printed from a Patient Chart.

✓ **Supplier Brands:** On Lens treatment lookup, Suppliers and Brands populating correctly in the drop-downs.

✓ **Return reason:** Return order reason is getting saved for Lens treatments.

- ✓ **Chart Number:** Special characters are allowed while entering Chart number in a Patient chart.

- ✓ **Sold Quantity:** Creating a Spectacle or Contact order and then converting it into an Invoice will not double the quantities of the items.

- ✓ **Restore selection:** Selecting Restore option directly selects the Restore radio button.

- ✓ **Labels Item Number:** Item No. showing on all label types.

- ✓ **Services:** Quantity field is enabled for Services in Quick Sale.

- ✓ **Lab Order Report:** Showing only the items related to the respective spectacle order on the lab order print report.

- ✓ **Product Security:** User who does not have access to Product Add and Edit will not be able to save the item in Inventory grid.

- ✓ **Invoice security:** User who does not have write access for Invoice under Patient Chart will not be able to open, edit or save an invoice.