

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.

¥	Patient	Order		×			
PREET SIDHU Patient ID: PNT0112	ETOBLOOKE ON CA W:	(109)363-8158	Patient Balance : \$0.00 Insurance Balance : \$0.00				
	C:	108)119-4577 To Invoice New	otal Outstanding Balance : \$0.00 Invoice Date 12/15				
Spectacles Order Contacts Order	Frame Contacts Services	Accessories Lens	Treatments GC				
Group Item Code I	Description Type Qty Price	Tax Discount	Total Date				
						Gift Card	
Redeem			Purchase r	new		New Gift Card	
			Gift Card	New Gift	Card		
Gift Card				Add Val		Card 01121514030000332149	💌 Auto Generate UPC
Discoun romotions	Credits		Sub Total			Amount \$100.00	
+ Gift Card 💌	\$0.00 Patient	Print Credits	Tax	\$0.00	c	ard Status Active	
Amount \$0.00 Payments		Apply Credits	Discount Total Due	\$0.00 Gift Card D		ard Expiry Dec 💌 2014 No Expiry	
	me 🗸 Amo User Notes		Total Paid	\$0.00 Card Transa \$0.00	actions Transac	tion Date 12/15/2014	
			Balance	\$0.00			
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Status DateTime U	User	🔄 🔤 Print	User Harry F	remi 💌			
		Cancel Sa	save & Close S	ive & Print			
Created On : 12/15/2014 02:	Returned Items	Promotion An	Created By : Harry Prem	Received			Add To Invoice
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123 Test Address		641	00.00				
NEW YORK, NEW Y	ORK 43434	S1	00.00				
Ph: (403)668-7799							
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Notredeemab	: Park Place Defor cash, except as requi oly. For balance inquiries pley Powered by VisionPro PO	ase contact the b					

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.



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ITM6542	magical1-Ut/blue/46	Frames	Marchon Canada	Disney	\$0.00	\$0.00	\$125.00	1	44334-23			E
ITM7653	kanda ro324	Frames	Abc Optical	Generic	\$0.00	\$0.00	\$200.00	1	32432			E
ITM8460	ea9560/z6g/51-17	Frames	Safilo Canada	Emporio Armani	\$0.00	\$0.00	\$300.00	1	66546			Ð
ITM8600	5209/20/6050/52	Frames	COS	Silhouette	\$249.95	\$0.00	\$749.00	1	34342			E

★ 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.

												Glas	ses Rx					[Rx C	1.1]
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asses Rx																										
Recommen							ses Rx	Туре			oillar	y Distance			Visua	I Acuit		out R	×		Norm	al		w	/ith Rx	
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★ 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.

23 Days Remaining	COMPLETE OPTICAL POINT-OF-SALE AND PRACTICE MANAGEMENT SOFTWARE Ver 15.01.01 © SoftForward Technologies Inc. All rights reserved.
MoreOptions	Continue www.visionpropos.com
Ver 15.01.01 © SoftForward Technologies Inc.All rights reserved.	COMPLETE OPTICAL POINT-OF-SALE AND PRACTICE MANAGEMENT SOFTWARE
ABC Optical	username password Orchard Street
	Log in Cancel

* 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

V.		User Detail	s								
		User Det	ail	5							
New Save Save & Close	Delete	Cancel									
Personal Information	Accou	nt Information				Admin	Settings				
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Password •••••											
Confirm Password											
Security Question What town you w	rere born in? 💌										
Answer 123456 (If you forget your passwo	rd we will ack for the s	answer to your security									
(if you forget your passwo	ra we will dsk for the a	question.)									
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	Block user availability
	Block user availability
Save	Cancel
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	Location Park Place
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Range Of Rec	urrence
Start	12/15/2014 💌 💿 No end date
	12/15/2014 Send By
Recurrence P	attern
	Everyday
Daily	() Everyday
Dally	Every month of
	Every All 💽 Week on
Weekly	Monday 💌 Tuesday 💌 Wednesday 💌
	Thursday 🗹 🛛 Friday 🗹 Saturday 📃 Sunday 📃
Block messag	
	Lunch Time - not available

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22 23 24 25 26 27	10					
29 30 31	10 ^{AM}					
v 2015						
MTWTFS						
123						
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19 20 21 22 23 24						
26 27 28 29 30 31 2 3 4 5 6 7						
Today						
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Calendars						
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ppointments						

* 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.

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	New	Save		Edit Clon	e Delete	Export List	Expo	rt to Excel			
		UPC			Description		Entere	d/Modified A	.11	~	
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Pro	oducts	s List		💌 Multi select							
		Item ID	I	Code	Description	Supplier	Brand	Color	Color	List Price	Qty
		ITM0624	\otimes		Ye 712/100/46	Le Group Opti	you'S			\$289.00	-1
		ITM0628	\otimes		Ye 734/61/47	Le Group Opti	you'S			\$299.00	0
>		ITM0630	\otimes		Ye 743/100/47	Le Group Opti	you'S			\$289.00	1
		ITM0631	\otimes		DIT 5/15/52	Le Group Opti	you'S			\$329.00	0
Ĩ		ITM0633		- W	YE 747/100/51	Le Group Opti	you'S		BLK	\$359.00	
		ITM0634			Ye 748/158/51	Le Group Opti	you'S			\$429.00	
		ITM0635			Ye 750/15b/46	Le Group Opti	you'S			\$299.00	
		ITM0637			Ye 765/15/51	Le Group Opti	you'S		BRN	\$339.00	
		ITM0639			Ye 769/100/47	Le Group Opti	you'S		47	\$289.00	
		ITM0641			Ye 777/15/47	Le Group Opti	you'S			\$269.00	
		ITM0642			Ye 778/205/50	Le Group Opti	you'S			\$339.00	
		ITM0643			Ye 781/15/50	Le Group Opti	you'S			\$399.00	
		ITM0644			Ye 782/100/52	Le Group Opti	you'S			\$299.00	
		ITM0647			Ye 785a/100/56	Le Group Opti	you'S		56	\$298.00	
Ĩ		ITM0650			Ye 797/15B/51	Le Group Opti	you'S	GRN/BR	N	\$289.00	
		ITM0651			Ye 799/100/50	Le Group Opti	you'S		50	\$289.00	
		ITM0652			Ye 801/15B/48	Le Group Opti	you'S		BRN/GRN	\$359.00	
		ITM0653			Ye 803/15/50	Le Group Opti	you'S		50	\$469.00	
		ITM0655			Yp 024/15/43	Le Group Opti	YOUPI		43	\$209.00	
		ITM0656	\odot		001	Abc Optical	Generic		52	\$199.00	1
		ITM0657	\otimes		002/30/53-15	Abc Optical	Generic		53	\$199.00	1
		ITM0658	\otimes		003	Abc Optical	Generic		52	\$199.00	1
		ITM0659	\odot		004	Abc Optical	Generic		53	\$199.00	2
		ITM0660	0		005	Abc Optical	Generic		51	\$199.00	3



★ 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.

				F	rames				
New	Save	Save & Close	Delete	Cancel	Print Ba	rcode			
oduct Details	;								
Item I	D ITM0661	L]	Туре	Frames		Тах	_	
Model	# 006	4		Location	Park Place	~	📃 TAX(8.875%)		
			Suppl	lier Name	Fashion Excellent	•		Item Pic	ture
		*	Brand/		Fashion Excellent	•			
Cod	le]	Active spensable		d 📃		Browse	Clear
			Dis	spensable					
								Inventory 💌	
Stoc	k 📃		Supplier Cost	\$0.00	Last Ord	dered Nil		Qty On Order 0	
Reorder Lev	vel 0		Landing Cost	\$0.00	Last Rec	eived Nil		Qty On Hand 1	
Internal U	PC 306611	9454063	Markup Multiplier	0.00	Last	Sold Nil		Total Sold 0	
Supplier U	PC		List Price	\$199.00	Average	Cost \$0.00)	Patient Returned 0	
Item Discou	int 💲 💌	\$0.00	Profit	\$199.00		Spiff	0.00	Transfer Out 0	In
Frame Proper	ties Ite	m By Location	Item History						
Eye	16		Frame Color	Code			Model Style		
Bridge	140		Frame	Color 53			Description		
Temple	0		Lens Color	Code			Style New		
А	0.0		Lens	Color		Cou	nty Manufactured		
В	0.0		Product Group	name	×		Year Introduced	ecember 2014	
DBL	0		Frame Ma	terial 15	•	+ N	otes		1
	0.00		Frame S	Shape	•			~	
Circumference				Туре	•				
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			Age (Group	· · · · · · · · · · · · · · · · · · ·			*	
		2011 07:45:40 PM					On: 12/23/2011		

★ **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.

Fr	ame		•	L () Encl	osed	9	To Come		Frame V	Varranty	Sup. Inv	oice	Clear
	Supplier	·	Bra	nd		Materi	al	Color	CC	M	Iodel			Stock
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R	0.00	0.00	0.00	0.00		Eye	BRDG	Temp	А	в	ED	DBL	Rim Type	Shape
L	0.00	0.00	0.00	0.00					0.0	0.0	0.00			

★ Received Barcodes: Ability to print barcodes only for received items in a Purchase order.

Save & Close rder PON0007 Luxottica sa estwinds Cres. NE		Purchase view E-M ation Park Place Park Place 123 Test Ad NEW YORK	Aail Delete	C			
rder PON0007 Luxottica M ra aestwinds Cres. NE		ation Park Place Park Place 123 Test Ad	dress	c	reated On 12/15	/2014	
PON0007 Luxottica	PO Loca	Park Place 123 Test Ad	dress	C			
Luxottica	PO Loca	Park Place 123 Test Ad	dress	C			
a estwinds Cres. NE		123 Test Ad	dress		reated By Harry	Premi	_
estwinds Cres. NE							
			NEW YORK 43434	Last M	odified On 12/15	/2014	7
		P: (403)668 F: (403)668	-7799		odified By Harry		
e, ON T3J 5H2 44.3334 F: 403.452.9175		F: (403)668	-7700				- 0
		Print La				eu (
der Items			63				
Item Description	Туре	Brand	Ord. Qty	Rcvd. Qty	Price	Inv. #	
spr58o/5ak-0b5/52-16	Frames	Prada	1	1	\$279.00	1	
bv8099b/901/8g/55-17	Frames	Bvlgari	1	1	\$489.00	•	
be1223/1001/52	Frames	Burberry	1	1	\$349.00	0	1
be2120/3002/51	Frames	Burberry	1	0	\$359.00	6	1
	spr58o/5ak-0b5/52-16 4 bv8099b/901/8g/55-17 5 be1223/1001/52	Item Description Type spr58o/5ak-0b5/52-16 Frames bv8099b/901/8g/55-17 Frames b1223/1001/52 Frames	Item Description Type Brand 0 spr58o/5ak-0b5/52-16 Frames Prada 4 bv8099b/901/8g/55-17 Frames Bv/gari 5 be1223/1001/52 Frames Burberry	Item Description Type Brand Ord. Qty 0 spr580/5ak-0b5/52-16 Frames Prada 1 4 bv8099b/901/8g/55-17 Frames Bvlgari 1 5 be1223/1001/52 Frames Burberry 1	Print Label Print Label Print Label Item Description Type Brand Ord. Qty Rcvd. Qty 0 spr58o/5ak-0b5/52-16 Frames Prade 1 1 4 bv8099b/901/8g/55-17 Frames Bvgari 1 1 5 be1223/1001/52 Frames Burberry 1 1	Items Print Label Print Label Item Description Type Brand Ord. Qty Rcvd. Qty Price 0 spr580/5ak-0b5/52-16 Frames Prada 1 1 \$279.00 4 bv8099b/901/8g/55-17 Frames Bv/lgari 1 1 \$489.00 5 be1223/1001/52 Frames Burberry 1 1 \$349.00	Item Description Type Brand Ord. Qty Rcvd. Qty Price Inv. # 0 spr58o/5ak-0b5/52-16 Frames Prada 1 1 \$279.00 1 4 bv8099b/901/8g/55-17 Frames Bvlgari 1 1 \$4489.00 1 5 be1223/1001/52 Frames Burberry 1 1 \$349.00 1

Email Log: Ability to keep a log of all outgoing emails.

Workdesk	oices Lab Ord	er Payments Scheduler	Inventory - Reports - Setup	- R - N		le Gift Card			Refres	н Ш Ехіт
Open Windows List 🔯	_			E-M	ail Log					
Reports		Export								
Patient: MINA EMA Frames										
Receive Inventory	Filter Crite	ria								
Patient Orders =		Category All	(m)	User All		ocation All				
Purchase Orders										
E-Mail Log		From Email		Email		Subject				
		From Date	To To	Date 💌		Search				
Inventory										
Physical Count	Log ID	Category	From	То	Subject	Message	Date	Time Lo	ocation	User
Patient Orders	0 1	1 Invoice	sales@visionpropos.com	hpremi@visionpropos.com	Invoice from ABC	Dear Customer,	12/15/2014	4:24 PM Par	k Place Ha	rry Premi
WorkDesk Patient Chart Scheduler						We have endosed your Please send your paym overdue charges. If you have any question the invoice, please control OK	ent to avoid =			
Scheduler	166 66 4 Re	ecord 1 of 1) IN IN K								

- ★ 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.

	System Preferences		
Print Preferences	Patient Chart		
- Color settings	DPD OD and OS Is Mandatory		
···· DateTime settings	Rx Auto calculation of DPD NPD for OD, OS and OU		
Currency settings General settings	Lab Order Settings		
Hot keys Software updates E-Mail account settings Database Scheduler & Room managemen Patient chart Report settings Inventory settings Terms & Conditions Search Settings SMS Account Settings Gift Card Settings X-Charce	Show Patient Chart Sections Personal Information Gaurantor's Information Emergency Contact Information Other Information File&Attachments File Maximum Size 2 MB Patient Details Patient Details Potient Details Prompt for E-mail Prompt for Mobile		
A churge	Recall Alert Recall Alert Recall Alert		

- ★ **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.

<u>v</u>	Label Settings	
Label Settings		Label Print Options
Label Name Arch Crown TT307	Clone Label	Brand ProductName Color
Label Preview	4	 ✓ Eye ✓ Bridge
Park Place 01000 Chanel 3 100019 455772 16/35/000/	=	Temple Location ListPrice(including tax)
<[[Label Information		ListPrice(excluding tax)
		Position 1
Top 00.00"	Bottom 00.00"	Print Order
Left Margin 00.00" Label Height 00.69"	Right Margin 00.00" Label Width 04.17"	Down then Across 1 5 9 2 6 1
Paper Kind Custom Paper Height 00.69"	Paper Width 04.17"	Across then Down
* All units are in inches CL -> Customized Label	Save Settings	Ok Cancel

★ 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.

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- ★ 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.



Search Criteria								
Description		Supplier	•			A	dd New Product	
Scan		Brand	Status ACT	IVE 💌		Sea	rch	
Item ID	Item	Code Description	Supplier	Brand	Price	Qty	Edit	
₽	Item		Supplier	brand	Thee	44	Luit	_
ITM3601	<u>_</u>	Lens Cleaner	Abc Optical	Generic	\$5.00	-2		
ITM3692	0		ptical	Generic	\$150.00	-1		
ITM4270	\odot	1			\$150.00	0		
ITM4763	\odot		otical	Generic	\$40.00	1		
ITM6325	\odot		otical	Generic	\$20.00	0		
ITM6768	\odot		otical	Generic	\$10.00	0		
ITM6952	\otimes	VISIONCENTER	otical	Generic	\$99.00	45		
Qty It	em Disco			10/1	5/2014 💌			

- ★ 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 dropdowns.
- ✓ 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.