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SUNIX Computer Consultants Pty Ltd

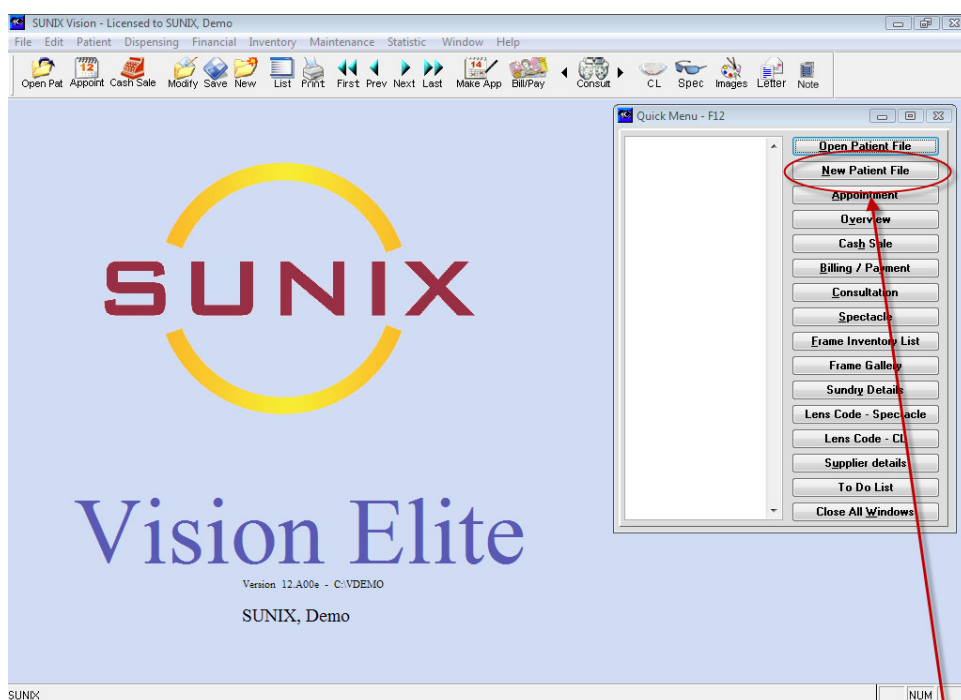
SUNIX has been developing and distributing practice management system since 1990. In the past 21 years, many updates have been released with many added new features and functionalities. SUNIX continues to be the leader in the industry. VISION is sold to over 1000 practices, and it has become the leading Optometric Practice Management System in Australia and New Zealand!

Chapter One

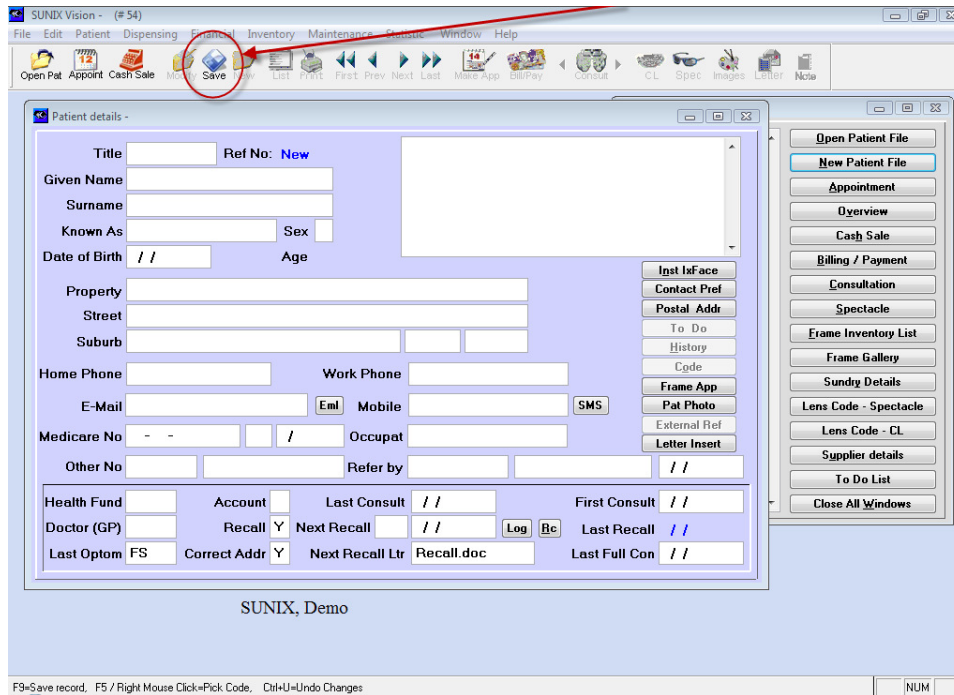
Introduction

Quick Tutorial

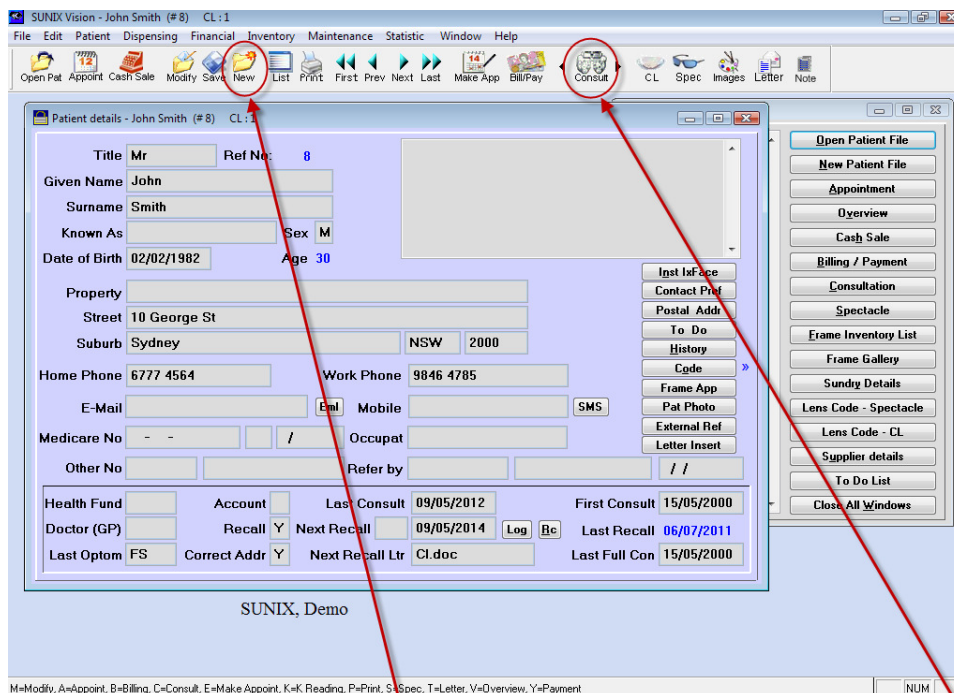
To enter a New Patient



1. From the **Quick Menu** at the right, single-left-click onto the button **New Patient File**.
2. Enter the patient's details (the name cannot be blank).
3. At any codes in Vision (e.g. Health Fund, Refer by), you can press **F5** or right-mouse-click to bring up the Pick List to Select.
4. When finish, press **F9** or single-left-click onto the **Save** button at the top to save.



To enter a Consultation for that patient



1. After the Patient Details screen is saved, single-left-click onto the **Consult** button at the top toolbar.
2. Single-left-click onto the **New** button at the top to select a Consultation screen layout, e.g. **Spectacle Consultation** or **Short Spectacle Consultation**, and then click **Create**.
3. Enter the consultation details including the top 2 lines and the 2 lines of the GI (Given) Rx and the Rx Note.

SUNIX Vision - John Smith (#8) CL:1

File Edit Patient Consulting Financial Inventory Maintenance Statistic Window Help

Open Pat. Appoint. Cash Sale Modify Save New List Print First Prev Next Last Make App Bill/Pay Consult CL Spec Images Letter Note

* Spectacle Consultation details: John Smith (#8)

Consult Date: 16/05/2012 Recall Letter: Recall doc: 10900 Optom: FS Age: 30 Billing: L
 Recall Date: 24 16/05/2014 Re Consult Item: 10900 PD: 60/50 Mono R: L

Symptom: Medication:

UVA R L OU History Allergy
 Cover D Cover N NPC cm Motility

Pupils: Ophthal: Biomec:

Rx R	Sphere	Cyl	Axis	VA	Add	Inter	L	Sphere	Cyl	Axis	VA	Add	Inter
Pr	+1.00							+2.00					
AU													
SU													
GI	+1.00	-0.25	175		+2.00			+2.00	-0.50	180		+2.00	

Rx Note: Multifocals Pinhole VA R L
 Pr Prism R H V L H V Heading Dist cm Near VA R L
 Gi Prism R H V L H V Diagnosis
 IOP R L @ Action
 IOP Method
 Pachymetry R L
 Adjust IOP R L
 Visual Field
 Col Vision
 VT
 xxx

Prev Rx Therapeutic Rx MIMS Overview K Read Inst InFace Code Drawing Letter Insert Binocular

- At any codes in Vision (e.g. Recall Letter), you can press **F5** or right-mouse-click to bring up the Pick List to Select.
- When finish, press **F9** or single-left-click onto the **Save** button at the top to save.

To enter a Spectacle for that patient

SUNIX Vision - John Smith (#8) CL:1

File Edit Patient Consulting Financial Inventory Maintenance Statistic Window Help

Open Pat. Appoint. Cash Sale Modify Save New List Print First Prev Next Last Make App Bill/Pay Consult CL Spec Images Letter Note

Patient details - John Smith (#8) CL:1

Title Mr Ref No: 8
 Given Name John
 Surname Smith
 Known As Sex M
 Date of Birth 02/02/1982 Age 30

Property
 Street 10 George St
 Suburb Sydney NSW 2000
 Home Phone 6777 4564 Work Phone 9846 4785
 E-Mail Eml Mobile SMS
 Medicare No / Occupat
 Other No Refer by /

Health Fund Account Last Consult 09/05/2012 First Consult 15/05/2000
 Doctor (GP) Recall Y Next Recall 09/05/2014 Log Re Last Recall 06/07/2011
 Last Optom FS Correct Addr Y Next Recall Ltr Cl.doc Last Full Con 15/05/2000

SUNIX, Demo

M=Modify, A=Appoint, B=Billing, C=Consult, E=Make Appoint, K=K Reading, P=Print, S=Spec, T=Letter, V=Overview, Y=Payment

- From the Patient Details screen, single-left-click onto the **Spec** button at the top toolbar. It will take you to the Spec screen with either blank record or the previous record (if any).

2. Single-left-click onto the **New** button at the top to select **New Spectacle Record**, and then click **OK**. Then the Given Rx and Rx Note from the latest Consultation record will come up automatically.
3. Then at Use, enter N (Near), D (Distance), M (Multifocals) etc. You can press **F5** or right-mouse-click to bring up the Pick List to Select. The Rx will get adjusted accordingly.
4. Enter the other Spectacle details such as Frame Code, Lens Code. You can press **F5** or right-mouse-click to bring up the Pick List to Select.
5. When finish, press **F9** or single-left-click onto the **Save** button at the top to save. You will be asked to **Create Billing Record**. Click **Yes** to create.
6. It will automatically create a Billing record

To enter Payment for that bill created

The screenshot shows the SUNIX Vision software interface. The main window displays the Billing details for John Smith. The top section contains fields for Billing Date (16/05/2012), Order No., Provider (FS), Service Date, Status (Entered), and Sale Type. Below this is a table with columns: By, Qty, Prod Code, Item No, Health Fund Description, Tax %, and Amount \$. The table lists items: Patient Opening Balance (0.00), Spectacle Frame (220.00), Fitting Of Lenses (20.00), and Multifocal Lenses + Hardcoat + Multicoat (400.00). At the bottom, there are summary fields: Patient Charges \$ 640.00, GST On Charges \$ 20.00, Medicare Billing \$ 0.00, Other Bulk Billing \$ 0.00, Payment on this Bill 0.00, Patient Closing Balance \$ 640.00, and Patient Overall Balance on 16/05/2012 640.00. A red circle highlights the 'New Payment F8' button.

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	1	OPT000009	110	Patient Opening Balance		0.00
P	1		FITTING	Spectacle Frame	10.00	220.00
PL	2	MVAL	512+652+662	Fitting Of Lenses		20.00
				Multifocal Lenses + Hardcoat + Multicoat		400.00

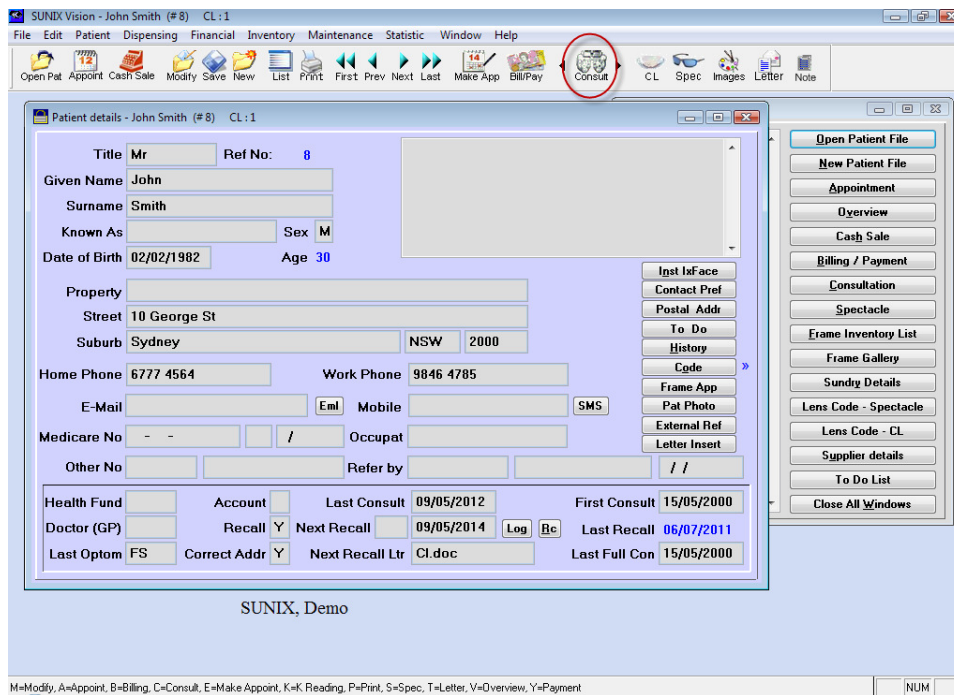
Patient Charges \$ 640.00
 GST On Charges \$ 20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
New Payment F8
 Payment on this Bill 0.00
 Patient Closing Balance \$ 640.00
 Patient Overall Balance on 16/05/2012 640.00

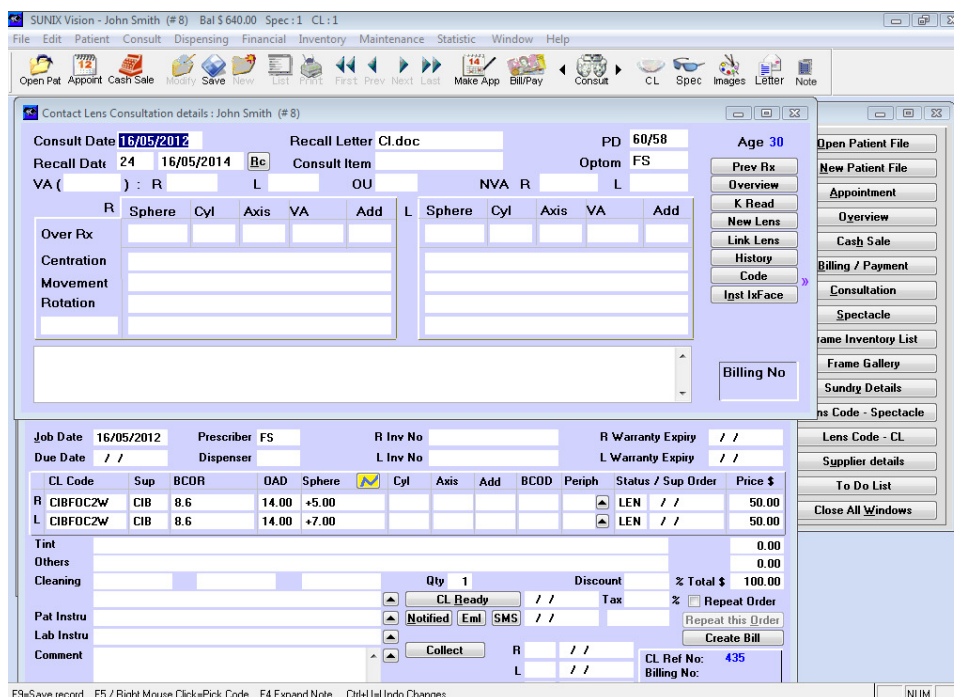
1. At the Billing record created, press **F8** or single-left-click onto the **New Payment** button near the bottom. Then select Cash, Visa etc
2. Enter the Total Payment and press Enter.
3. When finish, press **F9** or single-left-click onto the **Save** button at the top to save.

To enter a Contact Lens Consultation (with or without Order) for that patient

(For optometrists who is doing a contact lens fitting, delivery or aftercare consultation)



1. From the Patient Details screen, single-left-click onto the **Consult** button at the top toolbar. It will bring up a blank Consultation screen, or a previous Spectacle or Contact Lens Consultation record.
2. Single-left-click onto the **New** button at the top to select **Contact Lens Consultation & Order** or **Contact Lens Consultation Only**. Then click **Create**.



3. It will open 2 screens:
 - a CL Consultation screen (usually positioned at the top) - enter the consultation details such as Consult Item.
 - a CL Order screen (usually positioned at the bottom), enter the order details such as CL Code. You can press **F5** or right-mouse-click to bring up the Pick

- List. Highlight the lens you want and click the button **Select per Case** or **Select per Lens** at the bottom right hand side of the Pick List screen.
- When finish, press **F9** or single-left-click onto the **Save** button at the top to save. You will be asked to **Create Contact Lens Billing**. Click **Yes** to create.
 - A CL Billing will be created, and you can press either **F9** to save or **F8** for New Payment (refer to previous note on Payment).

To enter a Contact Lens Order for that patient (when there is no consultation)

- From the Patient Details screen, single-left-click onto the **CL** button at the top toolbar. It will take you to the CL Order screen with either blank record or the previous order (if any).

SUNIX Vision - John Smith (#8) CL:1

File Edit Patient Dispensing Financial Inventory Maintenance Statistic Window Help

Open Pat. Appoint. Cash Sale Modify Save New List Print First Prev Next Last Make App BillPay Consult CL Spec Images Letter Note

Patient details - John Smith (#8) CL:1

Title **Mr** Ref No: **8**

Given Name **John**

Surname **Smith**

Known As Sex **M**

Date of Birth **02/02/1982** Age **30**

Property

Street **10 George St**

Suburb **Sydney** NSW **2000**

Home Phone **6777 4564** Work Phone **9846 4785**

E-Mail Eml Mobile SMS

Medicare No - - / Occupat

Other No Refer by / /

Health Fund Account Last Consult **09/05/2012** First Consult **15/05/2000**

Doctor (GP) Recall **Y** Next Recall **09/05/2014** Log Bc Last Recall **06/07/2011**

Last Optom **FS** Correct Addr **Y** Next Recall Ltr **CL.doc** Last Full Con **15/05/2000**

SUNIX, Demo

M=Modify, A=Appoint, B=Billing, C=Consult, E=Make Appoint, K=K Reading, P=Print, S=Spec, T=Letter, V=Overview, Y=Payment

NUM

- Single-left-click onto either the **New** button at the top or the **Repeat this Order** button if you are repeating a particular order.

The screenshot displays the SUNIX Vision software interface. The top menu bar includes File, Edit, Patient, Consult, Dispensing, Financial, Inventory, Maintenance, Statistic, Window, and Help. The toolbar contains icons for Open Pat, Appoint, Cash Sale, Modify, Save, New, List, Print, First, Prev, Next, Last, Make App, Bill/Pay, Consult, CL, Spec, Images, Letter, and Note. The 'New' button is circled in red.

The main window is titled 'Patient details - John Smith (#8) Bal \$ 640.00 Spec: 1 CL: 1'. It contains fields for Patient details (Title, Ref No, Given Name, Surname, Known As, Sex, Date of Birth, Age, Property, Street, Suburb, NSW, 2000) and a right-hand sidebar with buttons for Open Patient File, New Patient File, Appointment, Overview, Cash Sale, Billing / Payment, Consultation, Spectacle, Frame Inventory List, Frame Gallery, Sundry Details, Lens Code - Spectacle, Lens Code - CL, Supplier details, To Do List, and Close All Windows.

The 'Contact Lens Order details: John Smith (#8)' window is open, showing a table of lens orders. The 'Repeat this Order' button is circled in red.

CL Code	Sup	BCOR	OAD	Sphere	Cyl	Axis	Add	BCOD	Periph	Status / Sup Order	Price \$
R CIBFOC2W	CIB	8.6	14.00	+5.00					LEN	//	50.00
L CIBFOC2W	CIB	8.6	14.00	+7.00					LEN	//	50.00

Below the table, there are fields for Tint, Others, Cleaning, Qty (1), Discount, % Total \$ (100.00), and buttons for CL Ready, Tax, Repeat Order, Repeat this Order, Create Bill, Collect, R, L, Replenish Date, CL Ref No (435), Billing No, and Bill Date.

At the bottom, a legend indicates: N=New, M=Modify, A=Appointment, B=Bill/Pay, D=Patient Details, E=Make Appointment, K=K Reading, P=Printing, S=Spectacle, V=Overview, Ctrl+F11=Cost, NUM.

3. Enter the order details such as CL Code. You can press **F5** or right-mouse-click to bring up the Pick List. Highlight the lens you want and click the button **Select per Case** or **Select per Lens** at the bottom right hand side of the Pick List screen.
4. When finish, press **F9** or single-left-click onto the **Save** button at the top to save. You will be asked to **Create Contact Lens Billing**. Click **Yes** to create.
5. A CL Billing will be created, and you can press either **F9** to save or **F8** for New Payment (refer to previous note on Payment).

Summary Usage

General Rule:

- Save the record if you need to do something else, even though you may not have finished entering the record yet. You can always finish it off by modifying it later on. This applies to all kinds of records except Billing or Payment record.
- For Billing or Payment record, try to finish it off first and save it before doing other things. It is best not to modify or delete any financial records because of taxation reason.
- Do not modify or delete a Billing or Payment record. Create a New record to reverse the entry instead.
- Close all records/windows as soon as you finish. Don't leave too many records/windows open. The goal is to always get back to the white entry screen.
- When you first bring up a screen. It is usually not ready for entry yet. The fields are grey in colour and the picture at the top left is a "lock". After clicking onto New or Modify (if there is already a record for modifying), the fields turn white and the picture turns to the Vision icon, indicating that it is ready for data entry.
- After typing data in a field, you must press Enter or Tab before Saving the record.

- At the top menu, extra options sometimes come up when you:
 - open a Consult record, a Consult menu will come up for extra options such as Create Billing
 - open a Frame record, a Frame menu will come up for extra options such as Adjust, Restock and Reports
 - open a Sundry record, a Sundry menu will come up for extra options such as Adjust, Restock and Reports

Summary Usage:

If you want to:	then, click onto
Exit out of Vision	File at the top menu, and then Exit; or the X button at top right corner of the Vision screen
Exit out of a record without saving it	File at the top menu, then Undo Changes to Record
Exit out of a record after saving	The X button at the top right corner of the record
Delete the record on the screen	File at the top menu, and then Delete Record
Save a record	Save button at the top toolbar; or press F9 on the keyboard
Bring up the windows that are open	Window at the top menu
Bring up a List of records	List button at the top toolbar
Bring up a selection of Codes to pick	Right mouse click on the field; or press F5
Go to Previous Record	Prev button at the top toolbar; or Press Page Up on the keyboard
Go to Next Record	Next button at the top toolbar; or Press Page Down on the keyboard

Initial Setups

Spectacle Lens codes

New installation of Vision Elite comes with a lot of lens codes with prices. To set up:

1. Go to Maintenance, then Lens Code Setup - Spectacle
2. Because there are a lot of codes (over 2000), they are originally marked with “N” for “Include in Picklist” so that you would not get such a huge list (unless you click “Show All”).
3. To customize your list, click onto the List button at the top toolbar. Then click onto “Show All” which will show all the codes
4. Select the one you want to show on the list. At “Include in Picklist”, change to “Y”
5. If you want to print barcode, at “Include in Barcode Listing”, also type in “Y”. the printout is sorted according to the “Price List Grouping”
6. If you do not like the code, you can change the Lens Code at the top of the screen. When you save the record, you will be asked whether to update, just click “Yes”.

Contact Lens codes

New installation of Vision Elite comes with a lot of CL codes with prices. To set up:

1. Go to Maintenance, then Lens Code Setup - Contact lenses
2. To set up your list, click onto the List button at the top toolbar.
3. For the ones you do not want to show on the list, untick the “Show” or change the “Include in Picklist” to “N”
4. For the ones you want to print barcode, at “Include in Barcode Listing”, type in “Y”
5. If you do not like the code, you can change the Contact Lens Code at the top of the screen. When you save, you will be asked whether to update, just click “Yes”.

Lens Extra (Tinting, Coating & Hardening)

To set up your list:

1. Go to Maintenance, then Lens Extra (Tinting, Coating & Hardening)
2. To set up your list, click onto the List button at the top toolbar.

Frames

1. Go to Inventory, then Frame Details
2. Click onto the New button at the top toolbar to enter new frame stock
3. If it is a new Supplier, you need to go to Maintenance – Supplier Details to create New one.

Sundries

1. Go to Inventory, then Sundry Details
2. Click onto the New button at the top toolbar to enter new sundry stock
3. If it is a new Supplier, you need to go to Maintenance – Supplier Details to create New one.

Stages of starting to use Vision

Please note that the followings are only a guideline on the stages of starting to use Vision. However, the stages may vary from practice to practice, and different practices may use Vision differently.

Stage 1:

- For all the patients coming for eye test now, use just the Patient's Details screen, entering details like Last Optom, Last Consult, Next Recall, Next Recall Letter and First Consult (if the patient is having a consultation today, the Last Consult date is today). In the beginning, you can do the entry after the patient has left. Later, you can try to enter the patient details straight into Vision while the patient is in the practice.

- In the Patient screen, you don't have to enter into every box. Just enter what you need at the top part of the screen and then go to Last Consult. You can press Space for today's date, - for going back one day and + for going forward one day. You can also save the record (by pressing F9) any time you like. You don't have to go to the last field before you can save it.
- In the mean time, do the setups under Maintenance, e.g the prices for:
 - Lens Code Setup - Spectacle
 - Lens Code Setup - Contact Lens
 - Lens Extra (Tinting, Coating & Hardening)
- In your free time, try to enter the stock under Inventory:
 - Frame details
 - Sundry details

Stage 2:

- All the tasks in Stage 1, as well as
- For some patients, not necessarily all, try to use the Consultation screen (after the patient has left the practice). At least enter the following details:
 - Consult Date & Consult Item
 - Recall Due & Recall Letter
 - Optom & PD
 - Given Rx (GI) & Rx Note

This information will be used for recalls, statistic and Spectacle Detail Screen.

- Once you start to use the Consultation screen, you do not need to enter the Last Optom, Last Consult, Next Recall and Next Recall Letter in the Patient screen any more, because this information from the Consult screen will update the ones in the Patient screen automatically.
- For some patients, not necessarily all, try to use the Spectacle screen (after the patient has left the practice). If the GI Rx and PD etc were entered in the Consult screen, they will get transferred into the Spectacle screen as soon as you click onto the "New Spectacle Record". The "Use" field will change the Rx, e.g. into near Rx etc.
- For some, not necessarily all, patients try to use the Spectacle screen (after the patient has left). *If Billing has already been entered before Spectacle record is entered, do not create another Bill/Pay from Spectacle again.* In the Spectacle screen, at least enter the details that generate charges, e.g.:
 - Frame (by using Frame Code or F5 if the frame is already in the computer)
 - Lens Code
 - Extras (if any)

This information will be used for creating Billing later.

Stage 3

- Similar to Stage 2, but try to create Billings and enter payments as well.
- Try to practice on more patients, so that you will be able to do the entry quickly. If a patient leaves a deposit or requires an account, the entry has to be done while the patient is still in the practice.

Stage 4:

- Everything in Stage 3, but try to use the Bill/Pay screen for all patients.
- In the mean time, try to do bulk billings like Medicare, Veterans etc.
- To set up a new Bulk Billing Account:
 1. In Bulk Billing Account under Financial, add a New account, e.g. AP for Australia Post.
 2. In Item No Details under Maintenance, set up item for the new Bulk Billing Accounts, e.g.

Paid By:	AP
Item No:	Screening
Description:	Screening Test
Amount:	\$21.40

Stage 5 (Parallel/Trial Run):

- Enter everything in Vision as well as your old manual system. You may only do this for a day or two.
- The day before the Parallel/Trial Run:
 1. check the Outstanding Accounts (under Financial) is correct and up-to-date:
 - For patients that are outstanding but not in the report, enter them in the Patient's Bill/Pay screen with the original billing or payment date;
 - For patients that are not outstanding but still in the report, delete their Payment and then Billing record.
 2. close the Banking
- At the end of the day, check the Banking figures between Vision and your old manual system. If they are the same, then you can proceed to Stage 6. Otherwise, do the Parallel Run for another day until all figures are correct.

Note:

- always check through the totals before closing a Banking or Bulk Billing

- if there are any mistake in data entry, fix it under the Patient's Bill/Pay, and then go back to Transaction under Banking or Bulk Billing (running the Transaction will re-calculate the totals)
- Close Banking at the time you want to do banking; and
Close Bulk Billing at the time you send the claim in (refer to Vision Manual on Bulk Billing).

Stage 6 (Official Change Over):

- Set a date to start the official change-over, preferably the beginning of a month.
- The day before the official change over,
 1. check the Outstanding Accounts (under Financial) is correct and up-to-date:
 - For patients that are outstanding but not in the report, enter them in the Patient's Bill/Pay screen with the original billing or payment date;
 - For patients that are not outstanding but still in the report, delete their Payment and then Billing record.
 2. close the Banking
 3. close all Bulk Billings, and mark "Outstanding" as "N".
 4. Print the Outstanding Accounts Report, as record.

Stage 7:

- You can try to use the Appointment (if you like).

When all 4 modules are being used:

- the Last Optom, Last Consult, Next Recall and Next Recall Letter in the Consult screen will update the ones in the Patient screen automatically,
- the Rx Date, Optom, PD, Given (GI) Rx and Rx note in the Consult screen will get transferred into the Spectacle screen as soon as you click onto the "New" in the Spectacle screen.
- the charges and details of the Spectacle and Contact Lens Order screen will be used to create Billing.

Quick Menu

The purpose of Quick Menu is to allow fast and easy access to commonly used screens or functions of the program. The left section of Quick Menu shows a list of patients opened since starting Vision. Double clicking onto a patient in the Quick Menu list will take you straight to the patient's record.

Buttons in the Quick Menu

Open Patient File

- This option allows you to search for a patient record from the database.
- A search can be done by:
 - ◆ Surname (only need to type the first few letters of the surname)
 - ◆ Reference number (each record in the database has a reference number associated with it)
 - ◆ First 3 letters of first name and first 3 letters of surname
 - ◆ Patient Date of Birth

New Patient File

- This opens a blank patient detail screen for entering a new patient

Appointment

- This option opens the Appointment Screen

Overview

- This options displays a summary of Spectacle, Contact Lens and Consultation records of the selected patient

Cash Sale

- This opens the Cash Sale screen for entering or looking up sales not related to any patients.

Billing/Payment

- This opens the Billing screen of the patient, where you can enter or just look up the Billing details of the patient

Consultation

- This opens the Consultation screen of the patient, where you can enter or just look up the Consultation details of the patient

Spectacle

- This opens the Spectacle screen of the patient, where you can enter or just look up the Spectacle details of the patient

Frame List

- This display a List of Frames, entered under Inventory – Frame Details.

Sundry details

- This opens the Sundry detail screen for entering new sundries, just looking up existing ones, checking the history, restocking, adjusting or reporting etc.

Lens Code

- To record information about Spectacle Lens codes and their corresponding Item numbers and prices.

Contact Lens Code

- To record information about Contact Lens codes and their corresponding Item numbers and prices and other details.

Supplier details

- For storing information about suppliers e.g. address, telephone numbers etc.

Optometrist/Doctor details

- For storing information about optometrist and dispensers in the practice (e.g. Provider Number) as well as ophthalmologists and doctors outside the practice.

To Do List

- It is a Task list reminding the staffs tasks that needs to be done.
- The tasks may or may not be related to a patient. The ones that are related to a patient are entered via the “To Do” button in the patient details screen. The ones that are not related to any patients are entered directly in the To Do List screen.

Close All Windows

- Closes all open windows.

Top Toolbar

The first group of buttons are functions not related to any particular patients:

Open Pat To open a previous patient.

Appoint To go to the Appointment screen.

Cash Sale To go to the Cash Sale screen.

The second group of buttons are functions for the record opened:

Modify To Modify the information of the record displayed.

Save To save updated screen.

New To add a new record.

The third group of buttons are features of the screen opened:

List Lists all invoices for patient

Print To print the Account/Receipt or Account Statements.

The fourth group of buttons are for going to different records of the screen:

First To go to first bill

Prev To go to the previous record.

Next To go to the next record.

Last To go to last record

The last group of buttons are related to the active patient:

Make App To make appointment for the patient

Bill / Pay To go to the Billing screen of the patient

Consult To go to the Consultation screen of the patient

Image To bring up old images (drawings or photographs linked) or create new ones for the patient

Letter To bring up old letters or create new ones for the patient

Spec To go to the Spectacle screen of the patient

Function Keys

Function keys are hot keys on the keyboard for special functions. The function can be executed by pressing the Function key on the keyboard. The general function keys in most screens are as follows:

Esc	To exit the screen
F5	To display a pick list of the current field for picking.
F9	To save the record displayed.

Screen Position & Size

Screens are re-positionable and re-sizable.

After you re-size a screen (the content appears to remain the same size), all you need to do is to close the screen and re-open it, the content will then be re-sized accordingly.

The screen position and size are set per Vision Login. In other words, you can have different size and position for different computers, e.g. a bigger screen for a computer with a bigger monitor and a smaller screen for a smaller monitor.

Vision Backup

Daily

- Exit out of SUNIX Vision on all the computers.
- At the Filserver,
 - insert the Daily USB into the computer (Monday USB for Monday, Tuesday USB for Tuesday etc);
 - if an Autoplay screen comes up, make sure the Drive Letter (e.g. E: F: etc) is the same as what the Vision Backup icon is for. Then close the Autoplay screen;
 - at the desktop, double-click onto the Vision Backup to USB icon (make sure it is the same Drive Letter as the one in the Autoplay screen);
 - a black screen will come up, then press any key to continue;
 - when finish, must check that:
 - the date of the backup file is the current date,
 - the size of the backup file is at least hundreds of thousands bytesthen press any key to close the screen;
 - at the System Tray at the far right of the bottom Taskbar, single-left-click onto the “Safely Remove Hardware” icon. Then single-left-click to eject the USB Drive (the same Drive Letter); and
 - only till the “Safe to Remove Hardware” message comes up, then you can remove the USB.

- At the same time you are doing the USB backup, walk to one of the Workstations (can be different workstations for different day of the week):
 - double-click onto the “Vision Backup to Workstation” icon;
 - a black screen will come up, then press any key to continue;
 - when finish, the black screen will close by itself

Monthly

(at the beginning of every month)

- Exit out of SUNIX Vision on all the computers.
- At the Filserver,
 - insert the Monthly USB into the computer (January USB for January, February USB for February etc) instead of the Daily ones; and
 - follow the USB Backup procedure as above.
- At one of the Workstations, follow the Workstation Backup procedure as above

Trouble-shooting

Important

Do not turn off the computer while in Vision.

But if there is a blackout, hardware or network problem while Vision is running, you must:

1. Exit out of Vision on all computers

2. Index Vision

Chapter Two

Patient Details

The Patient Details screen stores basic information about the patients, such as name, address, Medicare number etc. This screen can be opened either through Open Patient File on either the Quick Menu or the Patient Menu. The Patient Menu can be accessed by clicking onto Patient with the mouse.

Open Previous Patient

Open Patient File is used to search for a patient record. If a patient has been to the practice in the past, there are several ways to quickly find their details:

1. Surname / Reference

You can either type in the full surname or the first few characters of the surname and then press enter. If there is only one match, Vision will take you straight to that patient. If there are more than more match, a patient list in alphabetical order of the surname will be displayed with the first match highlighted.

Each patient record has a reference number associated with it. This can be seen on the patient record just next to the title. If you have a record card printed by Vision at the patient's last visit, the reference number will be printed on the card. Type in this number and press enter and the details for that patient will appear.

2. Given Name-Surname

A patient record can be referenced by the first 3 letters of the patient's first name and the first 3 letters of the patient's surname. It is only necessary to type the 6 letters: there is no need to type capitals or the hyphen. For example, to find "John Smith", just type "johsmi" and Vision will bring up John Smith's record in an alphabetic list of patient records. When you have the correct record, press enter and the record will appear. If there is no such record, Vision will bring up a list with the closest surname highlighted. For example, if you look for "Joe Citizen" and there is no record of this person in Vision, the list will appear with surnames closest to "Citizen" visible.

3. Date of Birth

A patient record can be referenced by the patient's date of birth. It is only necessary to type 6 numbers: there is no need to put the forward slash. For example, if the patient's date of birth is "01/01/1970", just type "010170" and the press enter. If there is no

patient with the date of birth 01/01/1970, then the list of patient records appears sorted by the year. For example, a record with date of birth 01/01/1971 may be highlighted and a record with a date of birth 01/01/1973 may be next on the list.

To display the list of patient records sorted in alphabetical order, press select. You can browse down the list using the up and down arrow keys or the Page Up and Page Down keys. Notice that in the bottom section of this screen displays details relating to the highlighted patient. Details such as address, contact numbers, age, date of birth, date of last consult and any outstanding amount are shown.

Clicking cancel will remove the list of patient records.

Clicking New Patient will allow you to enter a new patient record.

To Modify Previous Patient record

For Modifying a previous patient's record, just perform the following steps:

1. Select the required record by:
 - Using the List Option on the top Toolbar when a patient record is displayed.
 - Clicking onto Open Patient File
2. Double click anywhere on the screen with the mouse, or type M for Modify with the keyboard or click onto the Modify button.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the F5 function key can be used to display pick lists for certain fields.
6. After Modifying is finished, press F9 to save the record or click onto the Save button.
7. To exit from this screen back to the previous screen, just press Esc on the keyboard

New Patient

This option is for adding new patients into the database so that the patient details, consultation details etc. can be added. You can access this by selecting New Patient with the arrow key or by clicking on Patient and then New Patient. An empty Patient

Details screen will be displayed. The Patient Details screen stores basic information about the patients, such as name, address, Medicare number etc.

Add a New Patient record

For adding a new Patient record, just perform the following steps:

1. Click onto the New Patient file button at the Quick Menu or the New Patient option of the Patient Menu at the top. If a patient screen is already open, click onto the New button on the top Toolbar.
2. A new record will be displayed. The cursor will come down to the first field of the screen, ready for data entry.
3. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
4. During adding, the F5 function key can be used to display pick lists for certain fields.
5. After entry is finished, press F9 to save the record or click onto the Save button.
6. To exit from this screen back to the previous screen, just press Esc on the keyboard.

Fields in Patient Details screen

The fields are places where the actual data of the screens are stored. Some of the fields of the Patient Details screen are as follows:

Known As	This stores the nickname or the name the patient prefers to be called.
Property	This stores the property name, building name etc of the address, or the care-of person.
Other No	This stores any other reference number of the patient, e.g. Health Care Card Number, Practice Book Number etc.
Health Fund	This stores the code for the patient's health fund. A pick list can be displayed by pressing F5 and new codes can be added onto the list under Maintenance → Pick List.
Doctor (GP)	Optional – name of patients GP

Last Optom	This displays the code of the optometrist that performed the last consultation.
Account	Account rating – press F5 or right mouse click to pick list.
Recall	This indicates whether recalls should be sent to the patient (Y). Any recall codes other than "Y" will not generate recalls. This field defaults to "Y", which can be overwritten. A pick list can be displayed by pressing F5, and new codes can be added onto the list under Maintenance → Pick List.
Correct Addr	This indicates whether the address is correct (Y), or not (N). It defaults to "Y", which can be overwritten.
Last Consult	This is the date of the last consultation and will be displayed by the computer automatically if a consultation date is entered in the last consultation record.
Next Recall	This is the date when the next recall is due, and will be displayed by the computer automatically if a Next Recall Due date is entered in the last consultation record.
Rc	This field enables you to send extra recall letters to the patient. For example, if you wish to send the patient a letter three weeks after they pick up their spectacles to invite them to come back and have them adjusted, then you would enter the letter in this field. However, you leave the recall field set to the standard recall letter in two year's time.
Next Recall Letter	This is the type of recall letter that the next recall will be, and will be displayed by the computer automatically if a Next Recall Letter is entered in the last consultation record.
First Consult	<p>This is the date of the first consultation, and will be displayed by the computer automatically if:</p> <ul style="list-style-type: none">• a Consultation date is entered in the first consultation record, or• in the Patient Details screen, Last Consult date is entered and the First Consult was blank.
Last Recall	This is the date when the last recall was printed. It is displayed automatically by the computer once the recall is printed.
Last Full Con	Date of last full consultation. This field is in red if the last consultation is less than 2 years from today's date.
Note	On top right hand side of screen. This stores extra notes about the patient. It is a memo field which means there is unlimited space for data entry. It is the field on the top right hand side of the screen..

NOTE

For deceased patients, you should not delete their records. Also harddisk space is cheap, so you may as well just leave them there. All you need to do is to go to the Patient screen and change “Recall” at the bottom of the screen to “D” for “Deceased”. That way, no more recalls will go out to that patient. As a matter of fact, under “Recall”, the only code that will send out recalls are “Y” for “Yes”. Any other codes will not send out recalls.

Buttons in Patient Details Screen

Postal Address	To record a postal address.
To Do	This option allows the staff to make notes about tasks that need to be done for this particular patient at a later date. This will accumulate these tasks in the To Do List under Quick Menu.
History	To display a list of history records of the patient and for looking at and Modifying old history records or inserting new ones. The history records can be used for creating a patient list for sending newsletters.
Code	To display a list of Patient Code records of the patient and for looking at and Modifying old history records or inserting new ones. The Patient Code can be used for creating a patient list for sending newsletters.
Frame Approval	This is to record the frames the patient takes home for approval before purchase. Under Inventory, there are different Frame Approval reports. See Chapter Ten : Inventory Control for more details.
External No:	This option records any reference number, other than the reference number generated by Vision, such as book number etc.

Patient Photograph

In the Patient Details screen, upto 4 photographs can be attached to a patient, to help you to identify the patients or to help patients with frame selection. Both web-cam and digital cameras can be used. However, digital camera usually gives pictures of higher resolution which means the files size would be a lot bigger. Since patient photographs do not need to be high resolution, web-cam is more suitable for this purpose.

Setup

1. Take note of the default folder that your camera put the photographs in.
2. In SUNIX Vision, go to Maintenance - Default Parameters. At “Path to Patient Photo”, enter the default folder where your camera put the photographs (you can right click to bring up the Directories to select).

To attach a photograph:

1. Take a photo of the patient using the software that came with the webcam or digital camera.
2. Find the patient and then click onto the “Pat Photo” button at the right to select the patient’s photograph. *(To make it easier to identify which photo to select, click onto the “View Menu” button at the top right and select ‘Thumbnails’.)*
3. A small patient image will be displayed below the patient details screen. It is possible to attach up to four photos per patient.

Usage

- To enlarge the photograph, you can double-click onto the photograph, and the enlarged photographs can be put side by side for comparison. Also, the enlarged photograph can be further expanded by either clicking onto the “Maximize” button at the top right, or click-and-drag the corner of the window to make it larger.
- Unwanted photographs can be deleted by right-clicking onto the photograph at the bottom of the screen and then left-clicking “Delete this Image”.

Chapter Three

Appointment

This screen is for storing appointments, searching for patients, and can be used as a waiting list. An Appointment screen will be displayed, with the cursor at the bottom section of the screen.

If running Tablet PC, the appointment screen will automatically come up at the bottom of the screen instead of the top to fully utilise the whole screen area. (You need to be in Tablet mode before you start Vision, so Vision can detect it.)

Buttons in the Appointment screen

Prev F2	To go to the previous week.
This Week F3	To go back to this week.
Next F4	To go back to next week.
Move	To move an appointment to another time, day or optometrist (see notes on Move an Appointment).
Copy	To copy an appointment to another time, day or optometrist.
Insert	To insert an appointment.
Delete	If there is an appointment in the time slot, clicking the Delete button will delete the appointment
Calendar	To display a calendar for changing the screen to a different year or month. Clicking the arrows on the month will go to previous or next month; and clicking the arrows on the year will go to previous or next year.
F6 Find	To find the appointment(s) of a given patient.
Refresh	To repaint the Weekly Appointment Chart.
Undo	To undo an appointment if you have not already saved it. (If you have already saved the appointment used the delete button.)
Other	To bring up a menu for Create Empty Slot, Delete Empty Slot and Appointment Setup.

SMS To send an SMS to the patient of the highlighted appointment.

F7 Status To toggle the Status of an appointment. The time slot or appointment with different types of status will be displayed as different colours on the Weekly Appointment Chart and the Daily Appointment List. The different types of status and their corresponding colours are as follows:

Status	Meaning	Daily List
"Avai"	Available	Black
"Mayb"	May be available	Grey
"N/A"	Not Available	Grey
"Book"	Booked	Black
"Here"	Here	Red
Conf	Confirmed	Green
"Exam"	Examining	Blue
"Comp"	Complete	Grey

F8 Go To Patient If the patient of the appointment has not been searched before, pressing F8 will take you to the patient list for selecting (if he/she is a previous patient) or creating a record (if he/she is a new patient).

If the patient has already been searched or created, the Patient Reference Number will be displayed on the Appointment Details window. Then pressing F8 will take you straight to the patient record.

F9 Save To save the record displayed.

Make an Appointment

There are 2 ways of making an appointment for a patient:

Go from the Appointment screen to the Patient

1. Click onto the "Appoint" button from the top toolbar, or the "Appointment" button from the Quick Menu.
2. Select the optometrist by clicking onto the optometrist button; and/or select the day and time by clicking onto the Weekly Appointment Chart at the top left section, or the Daily Appointment List at the right section.
3. Type the appointment details in the Appointment Details window at the bottom left section.
4. When finished, click onto the Save button, or press F9 to save.

5. Then click onto the “Go to Patient” button or press F8. This will take you to the patient list:
 - If he/she is an existing patient, highlight the patient and click onto “Select Patient”. It will take you to that patient.
 - If he/she is not in the list, click onto “Create New Patient Record”. It will create a patient record with the patient’s name and phone number already there.

Go from the Patient screen to the Appointment

1. Go to the Patient Details screen of the patient you wish to make an appointment for.
2. Select the "Make App" button from the top right hand side of the screen. The Appointment screen will be displayed with the patient's name already in the bottom left Appointment Detail window.
3. Select the optometrist by clicking onto the optometrist button; and select the day and time by clicking onto the Weekly Appointment Chart at the top left section, or the Daily Appointment List at the right section, and/or select the appointment type using the F5 pick list.
4. Notes can be added onto the appointment and then save the appointment by either clicking onto the Save button, or pressing F9, or pressing Enter past the last field of the screen.

Move an Appointment

To move an old appointment to a different optometrist, time or day, just perform the following steps:

1. Click onto the appointment which needs to be moved.
2. Click onto the Move button. The appointment appearance will then changed from blue in white box to black in white box.
3. Select another optometrist by clicking onto the optometrist button; and/or select another day or time by clicking onto the Weekly Appointment Chart at the top left section, or the Daily Appointment List at the right section.
4. Click onto the Save button or press F9 and the appointment will then be moved to the new optometrist or time or day.

Modify a Previous Appointment

For Modifying a previous appointment, just perform the following steps:

1. Select the "Appoint" button from the Toolbar.
2. Click to the required appointment on the Weekly Appointment Chart or Daily Appointment List, the required appointment will be displayed in the bottom left Appointment Details window.
3. Modify the appointment details on the Appointment Details window.
4. When finished, click onto the Save button, or press F9 to save.

Setup Appointment for a New Optometrist

1. Go to Optometrist/Doctor/Dispenser's Details under Maintenance, create a New record for the new optometrist:
 - a. enter "Y" at the "Appointment (Y/N)" field near the bottom of the screen
 - b. select an "Appointment Colour" by pressing F5.
2. Go to Appointment Templates under Maintenance, create New Templates for that optometrist, by:
 - a. Click onto the "Create New Templates" button.
 - b. At "Optometrist", select the new Optometrist Code just created. (*Select **** for all optometrists*)
 - c. Enter the "Open At" time and "Close At" time.
 - d. Enter the "Duration".
 - e. Click onto the "Slot days". (*Do the days that have the same hours together*)
 - f. Click onto the "Create" button.
 - g. The list created will be displayed at the left hand side of the screen. Check to see if they are correct. If there is any mistake, you can edit by highlighting it and then click onto "Edit One Template". Or you can delete it by selecting "Delete One Template".
(*Note: If there are a lot changes to be made in the appointment templates, sometimes it may be easier to delete all of them and re-do them all. Just make sure you "Pack Appointment Templates" after deletion.*)
 - h. Repeat step a) to g) for other days or optometrists
 - i. When finished, press Close to exit
3. Go to the Appointment screen (e.g. by selecting Appointment in the Quick Menu)

- a. click onto the “Optom” button underneath the black weekly appointment screen. The Optometrist Display Combination screen will appear.
- b. Highlight the row or roster you want to modify and click Modify.
- c. Click onto the ↓ on right hand side of the box you want to change or set up. An optometrist list will appear. Select the new optometrist code from the list and then click OK.
- d. Then highlight the row or roster you want and click Select

Remove Appointment Setup of an Old Optometrist

1. Go to Appointment Templates under Maintenance, delete the templates for that optometrist by:
 - a. highlighting the one you want to delete at the template list and then clicking “Delete One Template”. Then repeat for every templates you want to delete;
or
Click onto “Delete Bulk Templates”. Select the optometrist and days and then click onto the “Delete” button.
 - b. The rectangular box in front of the template at the list will then turn black, indicating that the template has been deleted. (*Clicking onto the black box can clear or un-delete it.*).
 - c. When finish deleting (*all the ones you want to delete are marked black*), click onto “Pack Appointment Templates” to completely remove them off the list. (*Note: you must exit out of the Appointment screen in all computers before packing. Once deleted templates have been packed, you will not be able to undelete them anymore*)
 - d. When finished, press Close to exit.
2. Go to the Appointment screen (*Optional*)
 - a. Click onto the “Optom” button underneath the black weekly appointment screen. The Optometrist Display Combination screen will appear.
 - b. Highlight the row or roster you want to modify and click Modify.
 - c. Click onto the ↓ on right hand side of that optometrist. An optometrist list will appear. Select the blank one at the bottom of the list or replace it with a different optometrist. Then click OK.
 - d. Highlight the row or roster you want and click Select. That optometrist will disappear from the Appointment screen.

Note: Once an Optom Code been taken out of the “Optometrist Display Combination”, all appointments made for that optometrist, past or future, will NOT appear in the Appointment screen. Therefore, it may be wise to leave the old Optom Code in the Appointment screen for a little while for looking back old appointments, or at least after you move all his future appointments to another optometrist.

3. Go to Optometrist/Doctor's Details under Maintenance
 - a. Click onto List to select the optometrist
 - b. Modify to change the "Appointment (Y/N)" to "N".

Chapter Four

Billing/Payment

The Billing screen stores information about the Billing, Bulk Billing, credits etc of the patient, whereas the Payment screen stores Patient or Health Fund payments.

Billing

From the Patient Detail screen, click onto the "Bill/Pay" button at the top Toolbar. If the patient had Billing record(s) entered before, the last record will be displayed. If the patient has no records entered before, a blank Billing screen will be displayed.

Fields of Billing/Payment screen

The fields are places where the actual data of the screens are stored. To Modify the data of any field on the screen, just click onto the Modify button and then click onto the field you want to Modify.

Some of the fields of the Billing/Payment screen are as follows:

Billing Date	This will default to today's date. Press Enter to accept the displayed date, or type another date over it
Service Date	This is only used for for HIC Online, when the Consultation Service Date is different to the Billing Date.
Order No	This stores the Order Number of a VisionCare Billing or any other reference Order Number.
Billing No	This is a number allocated by the computer to each record and cannot be changed. When a new record is added, "New Record" will be displayed. After the record has been entered and saved by pressing F9, a Billing Number will be displayed
Status	This indicates whether the record is "Entered", or "Entered & Printer".
Hold Other Bulk Billing	A "Y" in this field holds the other bulk billing amount from going into the bulk billing section of the program (For example, the patient has not signed the form yet, and hence cannot be billed yet).

By

This indicates the paid "by" type:

1. Patient (P). The Patient charges can be sub-divided into Frame (PF), Lens (PL) or Sundries (PS).
 - If P is used, F5 can be used on "Item No" to display a Pick List for Patient Item Numbers.
 - If PF is used, F5 can be used on "Prod Code" to display a Pick List for frames.
 - If PL is used, F5 can be used on "Prod Code" to display a Pick List for lenses.
 - If PS is used, F5 can be used on "Prod Code" to display a Pick List for sundries.
2. Bulk Billing, e.g. Medicare (M), VisionCare(VC)
 - If M, VC or other bulk billing is used, F5 can be used on "Item No" to display a Pick List for the bulk billing Item Numbers (if it is set up in the Item Number Details of the Maintenance sub-menu).
 - New Bulk Billing Account or Paid By type can be entered under Bulk Billing Account of the Financial Menu.

Prod Code

This field is only used if Paid By type is "PF", "PL" "PC" or "PS". Press F5 on Prod Code will display a Pick List for:

- Frames if "By" type is "PF"
- Lens Codes if "By" type is "PL"
- Sundries if "By" type is "PS"

Item No

This stores the Item Number or Payment type. The Item Numbers are set up under the Item No Details of the Maintenance Menu (see notes on Maintenance). There are four ways to enter Item Numbers in.

1. Just type the Item No in.
2. Press F5 to display the corresponding Pick List for picking.
3. By entering the Prod Code in, the Item No will automatically displayed.
4. By creating the Billing record from the Spectacle Details screen, the item No will automatically be displayed.
If the bill is paid by (By) patient (P), the Item No Pick List will only show the ones that are paid by P; if it is paid by (BY) Medicare (M), the Item No Pick List will only show the ones that are paid by M, and so on.

Health Fund Description

This stores the health fund description of the sale item or consultation. It will automatically be displayed when a valid Item No or Prod Code is entered in.

Tax % GST amount

Amount This defaults to the amount corresponding to the Prod Code or Item No entered. Press Enter to accept the displayed amount or overwrite with another amount.

Patient Charges This shows the charges to the patient in the displayed record.

Medicare Billing This shows the Medicare bulk billing amount in the displayed record.

Other Bulk Billing This shows the bulk billing amount other than Medicare in the displayed record

Prev To go to the previous record.

Patient Closing Balance

This shows the closing balance up to the displayed record.

Last Payment F7 Shows details of previous payment received

New Payment F8 Allows you to enter details, i.e. cheque, or Modify card etc of new Payment.

Payment

To create a new Payment record:

1. From the Billing screen, click onto the New Payment button or press F8 (*There is no need to save the Billing record first. Clicking onto New Payment or pressing F8 will automatically save the Billing record for you.*)
2. Select the payment type
3. Enter the Total Payment (the Total Payment must be the same as the sum of the Payment Amount in the table)
4. Click onto Save or press F9

NOTE

If one cheque is payment for two or more patients, the appropriate amount allocated to each patient should be entered under each patient.

Modify Previous Billing/Payment record

For modifying a previous Billing Payment record, just perform the following steps:

1. Select the required record by clicking onto the "Prev" or "Next" button on the top Toolbar Bar, or pressing the PageUp or PageDown key on the keyboard.
2. Click the Modify button with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the F5 key can be used to display a pick list of options.
6. After modifying is finished, press F9 on the keyboard or click onto the Save button to save the record.
7. To exit from this screen back to the previous screen, just click onto the top 'X' of the Billing screen, or press Esc on the keyboard.

Note:

This function can be restricted by setting up via Login ID & Password under Maintenance. For better record keeping, it is not recommended to modify a bill once it has been saved. If a bill needs to be modified, it is better to Modify the old invoice and redo a new bill than to modify the old bill.

Cancellation

A.Financial

If the order has not been paid yet:

e.g.

Billing details - Graham Anderson (#1)

Billing Date : 01/01/2012 A0002524 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	1	OPT000010	110	Patient Opening Balance		0.00
				Spectacle Frame	10.00	220.00
PL	2	SVTRAN	212+632	SV Lenses + Tint		100.00

Patient Charges \$ 320.00
 GST On Charges \$ 20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill 0.00
 Patient Closing Balance \$ 320.00
 Patient Overall Balance on 16/05/2012 320.00

To cancel a Bill with no Payment

1. Go back to the original Bill to click onto the button **Reverse This Bill** and then click **Yes**.
2. A new Bill will be created with the Credits come up as negative, putting the balance back to zero:

Billing details - Graham Anderson (#1)

Billing Date : 16/05/2012 A0002590 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill A0002524

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	-1	OPT000010	110	Patient Opening Balance		320.00
				Spectacle Frame	10.00	-220.00
PL	-2	SVTRAN	212+632	SV Lenses + Tint		-100.00

Patient Charges \$ 0.00
 GST On Charges \$ -20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8

Payment on this Bill 0.00
 Patient Closing Balance \$ 0.00
 Patient Overall Balance on 16/05/2012 0.00

If the order has been paid partially or in full:

e.g.

Billing details - Graham Anderson (#1)

Billing Date : 01/01/2012 A0002524 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	1	OPT000010	110	Patient Opening Balance		0.00
				Spectacle Frame	10.00	220.00
PL	2	SVTRAN	212+632	SV Lenses + Tint		100.00

Patient Charges \$ 320.00
 GST On Charges \$ 20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill -120.00
 Patient Closing Balance \$ 200.00
 Patient Overall Balance on 16/05/2012 200.00

To cancel a Bill with Refund

1. Go back to the original Bill to click onto the button **Reverse This Bill** and then click **Yes**.
2. A new Bill of today's date will be created with the Credits come up as negative and Refund as positive, putting the balance back to zero:

Billing details - Graham Anderson (#1)

Billing Date : 16/05/2012 A0002603 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill A0002524

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	-1	OPT000010	110	Patient Opening Balance		200.00
				Spectacle Frame	10.00	-220.00
PL	-2	SVTRAN	212+632	SV Lenses + Tint		-100.00
RF			CASH	Refund by Cash		120.00

Patient Charges \$ 0.00
 GST On Charges \$ -20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8

Payment on this Bill 0.00
 Patient Closing Balance \$ 0.00
 Patient Overall Balance on 16/05/2012 0.00

To cancel a Bill without Refund

1. As you are cancelling a Bill with Refund, go back to the original Bill to click onto the button **Reverse This Bill** and then click **Yes**.
2. A new Bill of today's date will be created with the Credits come up as negative and Refund as positive.

- Then create a new Bill of today's date to re-enter the charges equivalent to the Refund amount.

Billing details - Graham Anderson (#1)

Billing Date : 16/05/2012 A0002604 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PL	2		212+632	Patient Opening Balance		0.00
				SV Lenses + Tint		100.00
P	1		FITTING	Fitting Of Lenses		20.00

Patient Charges \$ 120.00
 GST On Charges \$ 0.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8

Payment on this Bill 0.00
 Patient Closing Balance \$ 120.00
 Patient Overall Balance on 16/05/2012 120.00

- Click onto New Payment button to enter a Payment equivalent to the Refund amount, putting the balance back to zero.

Billing details - Graham Anderson (#1)

Billing Date : 16/05/2012 A0002604 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PL	2		212+632	Patient Opening Balance		0.00
				SV Lenses + Tint		100.00
P	1		FITTING	Fitting Of Lenses		20.00

Patient Charges \$ 120.00
 GST On Charges \$ 0.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8

Payment on this Bill -120.00
 Patient Closing Balance \$ 0.00
 Patient Overall Balance on 16/05/2012 0.00

B. Stock Control

For example, the original Spec record is as follows:

Spectacle details - Job No: 359, Graham Anderson (#1)

Job Date 01/01/2012 Spec Due 07/05/2012 @ Mon Lab Due 04/05/2012 Prev Rx

Job Type Status //

Dispenser DC Sale by

Rx: Date 23/04/2012 by FS

PD 60/56 Mono R 30 L 30

Use N Near

Rx	Sphere	Cyl	Axis	Add	Inter	H Prism	V Prism
Right	+1.00						
Left	+1.00						

Near only

Frame Code OPT000007 Gucci, 111, Silver, 48-18, 140 To Reorder \$ 220.00

Frame Size 48-18 Depth ED Type MM Other Fitting \$ Fr Discount \$

Lens Code	Lens Description (S = Stock, G = Grind)	Lens Size	Seg Siz	Seg Ht	OC Ht	Hor Decen	Ver Decen	BC	Lens Sup	Supplier Order Date	Lens Price \$
R SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00
L SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00

Extra 1 Lab to Apply \$

Extra 2 Lab to Apply \$

Extra 3 Lab to Apply \$

Others Lab to Fit \$

Lab Inst. Discount Reason Lens Discount \$

Overall Discount % Total \$ 320.00

Job Ready F6 // by GST

Notified F7 Eml SMS // Create Bill

Collected F8 // by

Follow Up // Bill A0002524

Advance Progressive Parameters E.Order

If the frame cannot be put back to stock

- modify the Sale price to the deposit amount received.

Spectacle details - Job No: 359, Graham Anderson (#1)

Job Date 01/01/2012 Spec Due 07/05/2012 @ Mon Lab Due 04/05/2012 Prev Rx

Job Type Status //

Dispenser DC Sale by

Rx: Date 23/04/2012 by FS

PD 60/56 Mono R 30 L 30

Use N Near

Rx	Sphere	Cyl	Axis	Add	Inter	H Prism	V Prism
Right	+1.00						
Left	+1.00						

Near only

Frame Code OPT000007 Gucci, 111, Silver, 48-18, 140 To Reorder \$

Frame Size 48-18 Depth ED Type MM Other Fitting \$ Fr Discount \$

Lens Code	Lens Description (S = Stock, G = Grind)	Lens Size	Seg Siz	Seg Ht	OC Ht	Hor Decen	Ver Decen	BC	Lens Sup	Supplier Order Date	Lens Price \$
R SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00
L SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00

Extra 1 cancellation fee Lab to Apply \$ 20.00

Extra 2 Lab to Apply \$

Extra 3 Lab to Apply \$

Others Lab to Fit \$

Lab Inst. Discount Reason Lens Discount \$

Overall Discount % Total \$ 120.00

Job Ready F6 // by GST

Notified F7 Eml SMS // Create Bill

Collected F8 // by

Follow Up // Bill A0002524

Advance Progressive Parameters E.Order

If the frame can be put back to stock

- modify the Sale price to the deposit amount received.
- Delete the Frame Code and it will automatically put the frame back in stock

Spectacle details - Job No : 359, Graham Anderson (#1)

Job Date 01/01/2012 Spec Due 07/05/2012 @ Mon Lab Due 04/05/2012 Prev Rx

Job Type Status //

Dispenser DC Sale by

Rx: Date 23/04/2012 by FS

PD 60/56 Mono R 30 L 30

Use N Near

Rx	Sphere	Cyl	Axis	Add	Inter	H Prism	V Prism
Right	+1.00						
Left	+1.00						

Near only

Frame Code Gucci, 111, Silver, 48-18, 140 To Reorder \$

Frame Size 48-18 Depth ED Type MM Other Fitting \$ Fr Discount \$

Lens Code	Lens Description (S = Stock, G = Grind)	Lens Size	Seg Siz	Seg Ht	OC Ht	Hor Decen	Ver Decen	BC	Lens Sup	Supplier Order Date	Lens Price \$
R SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00
L SVTRAN	S SV Transitions Stock 75mm	75							ESS	//	50.00

Extra 1 cancellation fee Lab to Apply \$ 20.00

Extra 2 Lab to Apply \$

Extra 3 Lab to Apply \$

Others Lab to Fit \$

Lab Inst. Discount Reason Lens Discount \$

Overall Discount % Total \$ 120.00

Job Ready F6 // by GST

Notified F7 Eml SMS //

Collected F8 // by Create Bill

Follow Up // Bill A0002524

Advance Progressive Parameters E.Order

HICAPs / Health Fund Payment

Set up HICAPS or Health fund Payment as a Direct Deposit Payment Type. Under Maintenance, go to Pick List, then Direct Deposit Payment Type. Enter in the Healthfunds, e.g.

Code	Description
MBF	Payment by MBF
HC	Payment by Hicaps

You only need to enter the popular ones, plus one miscellaneous one (e.g. HC) for all other non-popular ones.

Usage

After entering the bill, press F8 to bring up the New Payment screen. Then select the Healthfund from the list of Payment Type. After saving the Healthfund payment, if the patient is making a payment as well, press F8 for another New Payment.

Note

- As soon as the amount is entered in the Patient Payment screen, it is considered that you have already got the money, and you do not need to enter another payment in when you receive your Bank Statement.

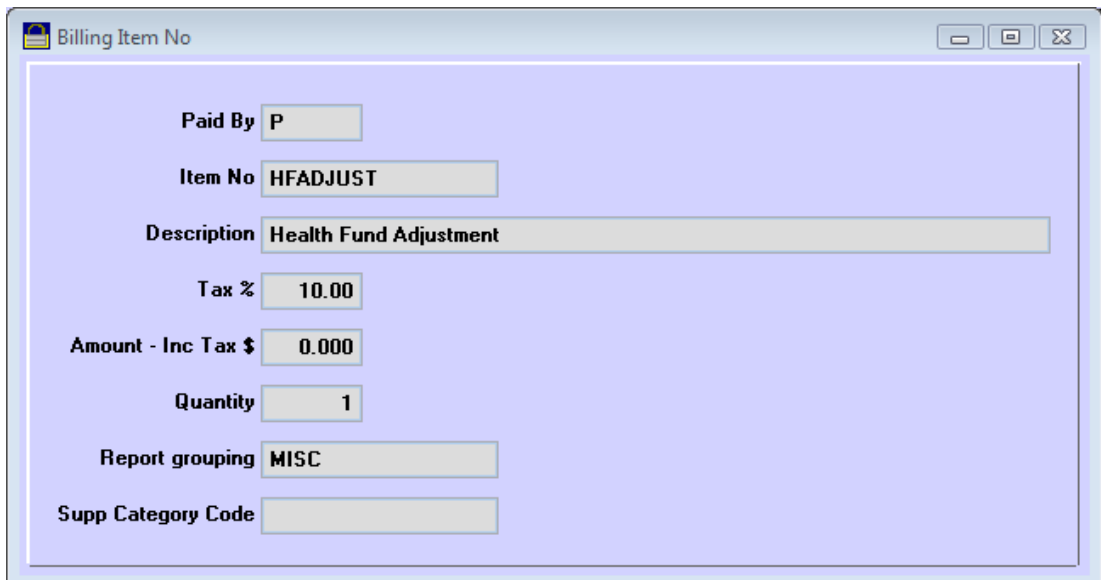
- If you want to mark off which payment has gone into your account, you can tick them off in Financial – Banking Reconciliation.

Refund for Health Fund Overpayment

A patient first left a deposit of an amount, which thought to be the gap between the charges and the Health Fund rebate. But when collecting the spectacles, it is found that the Health Fund is paying more than the balance of the bill.

Preliminary Setup

Go to Maintenance, then Item No Details to create the following new item:



The screenshot shows a software window titled "Billing Item No" with a light blue background. It contains several input fields with labels to their left:

- Paid By**: A text box containing the letter "P".
- Item No**: A text box containing "HFADJUST".
- Description**: A wide text box containing "Health Fund Adjustment".
- Tax %**: A text box containing "10.00".
- Amount - Inc Tax \$**: A text box containing "0.000".
- Quantity**: A text box containing "1".
- Report grouping**: A text box containing "MISC".
- Supp Category Code**: An empty text box.

For example

The original Bill is:

Billing details - Bob Davis (# 35)

Billing Date : 01/06/2012 A0002930 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	1		110	Patient Opening Balance		0.00
PL	2		212	Spectacle Frame	10.00	220.00
				SV Stock Lenses		100.00

Patient Charges \$ 320.00
 GST On Charges \$ 20.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill 0.00
 Patient Closing Balance \$ 320.00
 Patient Overall Balance on 11/06/2012 320.00

Thinking that the Health Fund will pay \$220, the patient leaves a deposit of \$100. But when collecting the spectacles, it is found that the Health Fund is actually paying \$250, not \$220.

Procedure

1. In order to accept a payment of more than the balance, you need to create a new bill for the extra amount (with Today's date):

Billing details - Bob Davis (# 35)

Billing Date : 11/06/2012 A0002941 Service Date : / / Sale Type

Order No : Status : Entered Sale By

Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
P	1		HFADJUST	Patient Opening Balance		220.00
				Health Fund Adjustment	10.00	30.00

Patient Charges \$ 30.00
 GST On Charges \$ 2.72
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill 0.00
 Patient Closing Balance \$ 250.00
 Patient Overall Balance on 11/06/2012 250.00

- Then enter the full Health Fund payment of \$250, leaving zero balance.
- To refund the patient, at the HFADJUST bill, click onto the “Reverse This Bill” button:

Billing details - Bob Davis (#35)

Billing Date: 11/06/2012 A0002941 Service Date: / / Status: Entered Sale Type: Sale By: Link this Discount/Rebate to Bill: Hold Other Bulk Billing: ☐

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
P	1		HFADJUST	Patient Opening Balance	10.00	0.00
				Health Fund Adjustment		30.00

Patient Charges \$ 30.00
 GST On Charges \$ 2.73
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill -30.00
 Patient Closing Balance \$ 0.00
 Patient Overall Balance on 11/06/2012 0.00

- A reversal bill will be created automatically. Then right-click at the Item No of the RF line (HC) to change the Refund method e.g. to Cash:

Billing details - Bob Davis (#35)

Billing Date: 11/06/2012 A0002946 Service Date: / / Status: Entered Sale Type: Sale By: Link this Discount/Rebate to Bill: A0002941 Hold Other Bulk Billing: ☐

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
P	-1		HFADJUST	Patient Opening Balance	10.00	0.00
RF			HC	Refund by Hicaps		30.00

Patient Charges \$ 30.00
 GST On Charges \$ 2.73
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Refund By

Code	Description
AX	Refund by American Exp
Bankcrd	Refund by Bankcard
Cash	Refund by Cash
Cheque	Refund by Cheque
DC	Refund by Diners Club
DDep	Refund by Direct Deposit
EFTPOS	Refund by EFTPOS
Master	Refund by Mastercard
Visa	Refund by Visa

Select
 New
 Modify
 Delete
 Cancel

0.00
 0.00
 0.00

Take Home Layby

Setup:

Go to Maintenance –Item No Details, Click onto New to enter as follows:

Usage:

For example, a patient buys a pair of spectacles and the original bill is:

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
PF	1		110	Patient Opening Balance		0.00
PL	2		212	Spectacle Frame	10.00	440.00
				SV Stock Lenses		360.00

Patient Charges \$	800.00	Last Payment F7	Payment on this Bill	0.00
GST On Charges \$	40.00	New Payment F8	Patient Closing Balance \$	800.00
Medicare Billing \$	0.00	Reverse This Bill	Patient Overall Balance on 14/09/2010	800.00
Other Bulk Billing \$	0.00			

The patient leaves a deposit of \$200 with a balance of \$600, and signs up for Take Home Layby.

A few days later, the practice receives a final payment from Take Home Layby of, e.g. \$501, which means a service fee of \$600 - \$501 = \$99 has been deducted off. To enter, you will:

1. Create a new Payment for the total patient owing of \$600 (of today's date).
2. Then create a new Bill for the service fee and a Refund of \$99 (of today's date):

Billing details - Florence Sun (# 2)

Billing Date : 15/09/2010 A0000099 Service Date : / / Sale Type
 Order No : Status : Entered Sale By
 Provider : FS Hold Other Bulk Billing : Link this Discount/Rebate to Bill

By	Qty	Prod Code	Item No	Health Fund Description	Tax %	Amount \$
P	1		THLB	Patient Opening Balance		0.00
				Take Home Layby Service Fee	10.00	-99.00
RF	1		DDEP	Refund by Direct Deposit		99.00

Patient Charges \$ -99.00
 GST On Charges \$ -9.00
 Medicare Billing \$ 0.00
 Other Bulk Billing \$ 0.00

Last Payment F7
 New Payment F8
 Reverse This Bill

Payment on this Bill 0.00
 Patient Closing Balance \$ 0.00
 Patient Overall Balance on 15/09/2010 0.00

So, in Banking, there will be a Payment of \$600 and a Refund of \$99, which is equivalent to a net Payment of \$501.

Chapter Five

Cash Sale

This option is for storing information about sales of goods to non-patients, patients that are not in the database, or when you just do not bother storing the record under the patient's billing. The goods can be items entered under Sundries in the Inventory, or miscellaneous items that are not recorded in the computer, such as spectacle chains. On the Tooobar, just click onto the "Cash Sale" option with the mouse. A Cash Sale screen will be displayed.

Fields of Cash Sale screen

The fields are places where the actual data of the screen is stored.
Some of the fields of the Cash Sale screen are as follows:

Receipt No	This is automatically generated by Vision and cannot be changed.
Date	This will default to today's date. Press Enter to accept the displayed date, or type over it with a new date.
Uncoded Item	This is for entering miscellaneous items that are not coded or recorded in the Inventory of the computer, e.g. spectacle chains.
Coded Items	This is for entering items that are coded or recorded in the Sundries of the Inventory. Type the code in, or press F5 to display a Pick List for picking.
Qty/Amount	The quantity will default to 1 and the amount will default to the price of one item. Press Enter to accept the default values, or type a new quantity in. Then the corresponding amount will be displayed.
Discount/Total	The Total Amount is calculated and displayed by the computer. Enter a Discount in and the Total Amount will get adjusted automatically, or vice versa.
Paid By	This stores whether the payment is made by cash (CASH), Cheque (CHEQUE), Bankcard (BANKCRD), Mastercard (MASTER), Visa Card (VISA), American Express (AX) or Diners Club (DC). Just type the Paid by code in or press F5 to display the Pick List for picking.

Banking

This indicates the Banking Number that the Cash Sale payment goes in.

Add New Cash Sale record

For adding a new Cash Sale record, just perform the following steps:

1. On the Main Toolbar, just click onto the "Cash Sale" option with the mouse. A Cash Sale screen will be displayed.
2. Click onto the "New" button at the top Toolbar.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. During adding, certain function keys can be used, e.g. F5 for pick list and F9 to save the record.
6. After entry is finished, press F9 on the keyboard or click onto the "Save" button to save the record.

Modify Previous Cash Sale record

For Modifying a previous Cash Sale record, just perform the following steps:

1. Select the required record by clicking onto the "List" button at the top Toolbar.
2. Click the "Modify" button with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, you can press. F5 for pick list.
6. After Modifying is finished, press F9 on the keyboard or click onto the "Save" button to save the record.

Cash Sale Refund

To refund someone (not one of the patients) who has previously purchased a Cash Sale item

If you want to put the item back into stock:

1. In the Cash Sale screen, choose New to create a new transaction record with today's date.
2. At the **Coded Items** section, press F5 and choose the relevant item from the pick list.
3. In the Quantity box (Qty), make sure the item is entered as a negative item (eg. -1 not 1). When you key enter, the item price should have a minus sign in front of it as well (ie -150.00) and the total will be a negative amount (ie. \$ -150.00).
4. In the Paid By box, choose the method of refund

If you are not going to put the item back into stock:

1. In the Cash Sale screen, choose New to create a new transaction record with today's date.
2. At the **Uncoded Item** section, type a description of the item being returned.
3. In the Amount box (Amount \$), enter the item price with a minus sign in front of it. Make sure the total at the bottom of the screen (Total \$) appears as a negative amount (ie. \$ -150.00).
4. In the Paid By box, choose the method of refund

Chapter Six

Financial Management

The Financial Menu is for entering all financial transactions as well as for running reports which relate to the financial side of the practice.

Banking

In Vision, Banking is calculated per period. In other words, banking can be done whenever you like, e.g. everyday, every three days or twice a day.

Fields of Banking screen

Cash Received, Cash Deposit

Cash Received is calculated by Vision. Cash Deposited is the amount of cash the actually gets deposited at the bank. The two can be different For example, if petty cash is set up to be deducted from banking (under Maintenance → Billing/Banking Details) they will be different figures.

Cheque Received, Cheque Deposit

Cheque Received and Cheque Deposit should be the same.

Credit Card Deposit, Direct Deposit into Bank

Credit Card Deposit shows the amount of the takings from credit card transactions. If the Credit Card is set up to direct transfer into the bank account (set up in the Billing/Banking Details under Maintenance), the Credit Card Deposit amount is the same as the Direct Deposit into Bank amount.

EFTPOS (include Credit Card)

This figure shows all the figures for EFTPOS transactions, including the credit card figures. In other words, all the transactions where cash was not received.

Buttons of the Banking screen

The buttons of the Banking screen are as follows:

Print Banking Reports

To print Deposit Slip and/or Transaction Listing and/or Banking Summary.

Transaction Listing

To display the list of payment transactions in the banking period.

Close Banking-Period

Closing a Banking period means that you are actually banking the money that is in the banking period. Once Banking is closed, subsequent payments will go into a new banking period.

NOTE

New payments always go to the current banking period. You can never put a new payment back to a banking period that is already closed (i.e. banked). Therefore, it is important to check through all banking transactions before you close the banking period.

Modify

To Modify the information of the displayed record.

Next

To go to the next banking period.

Prev

To go to the previous banking period. If the user is set up only to have access to the current banking only (see notes on Login Id under Maintenance), this option will be inactive.

List

To display a list of banking periods for selecting. If the user is set up only to have access to the current banking only (see notes on Login Id under Maintenance), this option will be inactive.

Procedure for Banking

1. Check through the Banking Transaction. To do this, go to Financial, then Banking. Vision will automatically open banking at the current banking period. Then click onto Transaction and check that all the transactions listed are correct and balance with the cheques, cash, credit card and EFTPOS “stubs” in the till.
2. If there is any discrepancy in any payment transactions, go to the Patient's Bill/Pay record and fix it up by Modifying the Billing/Payment record so that the correct transaction is recorded.
3. Go back to check through the Banking Transaction again
4. Only after everything matches, then Close Banking by clicking onto “Close-Banking-Period” in the Banking screen.

5. On the banking screen, modify the Cash Deposit field so that the amount of cash you are taking to the bank is recorded in that field.
6. Print 2 Deposit Slips and 1 Transaction Listing by clicking onto Print in the Banking screen and selecting them.
7. Take both Deposit Slips to the bank and the bank will stamp both of them. The bank will take one Deposit Slip and you will keep one, which is to be filed with the Transaction List.

NOTE

Make sure you check through the banking transactions before you closing the banking period. Once a banking period is closed, a user cannot Modify or delete any payment transaction from the closed banking period, unless he is set up as a Banking Supervisor under Login ID under Maintenance. (See notes under Maintenance for Login ID.)

MYOB Interface

Setups

Go to Billing / Banking Setup under Maintenance, click on the “Banking Export” button. Enter in the MYOB Account Numbers:

- Cheque Account for Account 1 is the MYOB Cheque Account, e.g. 1-1100
- Charges for Account 1 is the MYOB Account Number for the Sale Account, e.g. 4-1100.
- If Vision is setup with 2 banking Accounts, enter in the MYOB Account Numbers for the second Bank Account and the Sale Account as well.

To Export Banking Details from Vision

In Vision:

1. Go to Banking under the Financial menu.
2. Click “Export Banking Figures”
3. Enter in the Banking Period for exporting (you can press F5 or right-mouse click for the Pick List). Then click OK

For testing purpose, it is a good idea to export just one Banking to begin with.

A file MYOB.TXT will be created in the V2K folder. It contains the Banking figures for importing.

To Import Banking Details into MYOB

Important: You MUST backup MYOB before importing. This way, if the import fails or does not work properly, you can always restore the MYOB backup.

In MYOB:

1. Go to **File, Import Data** and then click on **General Journal Entries**
2. Select Format to **Comma-Seperated**
3. Select First Record to be **Data Record**
4. Click on the button **Continue**
5. Look into the V2K folder and double-click on the file **MYOB.TXT**
6. Click on the button **Match All** and then click on the button **Import**
7. The number of records imported will appear in the pop up windows.

You can then check the Journal entries created.

Bulk Billing Accounts

Bulk Billings are third party billings where patient charges are billed to a third party instead of the patient. In Vision, there are 2 types of Bulk Billing: Patient Rebate and Non-patient Rebate:

Non-Patient Rebate

If the department often pays for the full amount, and the patient rarely needs to pay for any part of it. This usually applies to departments paying for consultation fees, e.g. Medicare, Veterans Affairs Consultation (V) or departments for screening test etc

1. Go to Bulk Billing Accounts under Financial, enter a New record leaving "Patient Rebate" blank or "N". For example, "V" for Veterans-Consultation (which is already setup in Vision)

Account Code	V
Vision Description	Veterans - Consult
Patient Rebate	N

2. Go to Item No Details under Maintenance, enter records such as:

Paid By	V
Item No	10900
Description	Initial Consultation
Tax %	<i>(enter the Tax % if it is a taxable item)</i>
Amount – Inc Tax	\$50

Report Grouping

Consult

If the Item numbers and fees of the account are the same as another account whose item numbers are already set up, instead of setting them up all over again, you can set up to use the item numbers from a different account. To set up this way, go to Bulk Billing Account and enter “Use Item No from”. For example, the Veterans consultation item numbers and fees are the same as the Medicare ones. Then instead of setting all the items again, enter “M” for “Use Item No from” under Bulk Billing Accounts.

- After entering the Consultation Item Number in the Consultation screen, you can create a Consultation Billing by pressing Ctrl M for Medicare and Ctrl D for Veterans. (Alternatively, you can manually enter the consultation charge in the Billing screen.)

By	Item No	Health Fund Description	Amount \$
		Patient Opening Balance \$	0.00
V	10900	Initial Consultation	50.00
		Patient Closing Balance \$	0.00

The charge will go directly into the Bulk Billing Account rather than the patient. If required, you can print the “Bulk Billing Account” for that patient from the patient’s Billing screen.

- The billing amount will then be accumulated in Bulk Billing (not Banking), which you can print a “Tax Invoice / Statement” in Transaction of Bulk Billing/Payments (under Financial).

Note: If this Statement is to be printed, make sure the Item Number is not too cryptic. The Item Numbers have to be meaningful enough for the department to understand (e.g. Screening, not just S), because only the Item Number will get printed in this Statement.

Patient Rebate

If the department rarely pays for the full amount, and the patient often needs to pay for the gap. This usually applies to departments paying for spectacles.

- Go to Bulk Billing Accounts under Financial, enter a New record with “Patient Rebate” = “Y” e.g.

Account Code	SS
Vision Description	Spectacle Scheme
Patient Rebate	Y

Important:

Do not change a Bulk Billing Account from Non-Patient Rebate to Patient Rebate, or vice versa. Set up a new account with different account code instead.

2. Go to Item No Details under Maintenance, enter New records for rebates, e.g.

Paid By	SS	SS
Item No	FRAME	BF
Description	SS Rebate for Frame	SS Rebate for Bifocal Lenses
Tax %	10	0
Amount	\$33	\$50
Quantity	1	1
Report Group	FRAME	LENS

3. For Frames, go to Inventory, then Frame Details. If there are contract frames that are sold only at contract prices, just enter them at the contract prices. But if those frames can also be sold to normal patients at a higher price, enter them at the higher price for normal patients. In the Colour box, you can enter in the contract price as a note (e.g. Red SS55).
4. For Lenses, go to Maintenance, then Lens code Setup – Spectacle, click onto List to select a Lens Code that you will also sell as contract lenses. Then click New and select “New Spectacle Lens Code – Same details”. Make up a code beginning with a letter such as SS for (e.g. SSBFCR28). Change the Retail Price to what you will receive from SS. Leave the Item No as the normal health fund ones, e.g. 311, 312 etc.
5. For Extras, go to Maintenance, then Lens Extra for Tinting, Coating, Hardening and Case etc, Create codes beginning with a letter such as SS (e.g. SSTINT). Enter the charges to what you will receive from SS. Use the normal health fund Item numbers, e.g. 631, 632 etc. For spectacle case, e.g. Extra Code SSCASE, use Item number such as CASE (you can create this Item No in Maintenance – Item No Details with Report Grouping MISC)
6. Create a Spectacle record:
- For Frame, if a contract frame with normal sale price is selected, change the charge to the contract price by looking up the note after the frame colour.
 - For Lens Codes, select the SS lenscodes or normal codes depending on whether the patient is selecting contract lenses or normal lenses.
 - For Extras, also enter SS extra codes (if any)
 - Before saving the Spectacle record, making sure the Total Charge of the Spectacle record is the total charges that you will be receiving from both the Bulk Billing Department and the patient.
7. After saving the Spectacle record and create the Billing as usual, i.e. all amount charges to the patient first e.g.

By	Item No	Health Fund Description	Tax %	Amount \$
PF	110	Spectacle Frame	10	233.00
PL	312	Bifocal Lenses		50.00

8. Then, in the next line of the same bill, enter in the Bulk Billing Patient Rebate (SS), which will come up as negative figures. If the patient selects contract frame and contract lenses, the Rebate amounts will be exactly the same as the charges,

hence leaving a nil patient balance. If the patient select a non-contract frame or non-contract lenses, there will be a balance for patient to pay:

By	Item No	Health Fund Description	Tax %	Amount \$
PF	110	Spectacle Frame	10	233.00
PL	312	Bifocal Lenses		50.00
SS	FRAME	SS Rebate for Spectacle Frame	10	- 33.00
SS	BF	SS Rebate for Bifocal Lenses		- 50.00
Patient Closing			Balance \$	200.00

“Account Statement” can be printed from the patient’s Billing or Payment screen.

Important:

If the Patient Rebate is entered in a different bill to the bill where the original charges are, at the top right hand corner of the Bill of the Rebate, you must “Link this Discount/Rebate to Bill”, by entering the Billing Number of the original bill of the charge (You can press F5 or right-mouse click for the Pick List).

- The Rebate amount will then be accumulated in the Bulk Billing (not banking), which you can print a Tax Invoice / Statement in “Transaction” of Bulk Billing/Payment (under Financial).

Bulk Billing/Payment

This option is for storing both the Billing and Payment information of the Bulk Billing Accounts. On the Financial Menu, just click onto the Bulk Billing/Payment option with the mouse. The Bulk Billing/Payment screen will be displayed.

Buttons of the Bulk Billing screen

The buttons of the Bulk Billing/Payment screen are as follows:

Close-Period

Closing a Billing period means that you are actually sending the claims of the period to the relevant organisation. Once the Billing Period is closed, new Bulk Billing entries will go to a new period.

NOTE

New Bulk Billing entries always go to the current period. You can never put a new Bulk Billing entry back to a banking period that is already closed (i.e. sent). Therefore, it is important to check through all transactions before you close the period.

Payment	To bring up a payment screen for the displayed period, where you can add New payments, or Modify old payment records.
Transaction	To display the list of bulk billing transactions in the period.
MedClaim	Only for Medicare – electronic lodging of Medicare claim.

To send in a Bulk Billing

1. Click onto Financial. Then Bulk Billing/Payment and select the type of Bulk Billing.
2. Click onto the Transaction button to check if all the bills are correct (such as patient names, amount and GST). Then get out of the Bulk Billing Transaction screen
3. At the Bulk Billing screen, check the Total Billing amount and GST are correct and then click onto “Close Period”.

Optional: From the Bulk Billing Transaction screen, you can print the Tax Invoice / Statement of the list of bulk bills.

To enter a Bulk Billing Payment

1. Click onto Financial. Then Bulk Billing/Payment and select the type of Bulk Billing.
2. Click onto List or Prev to select the correct Bulk Billing Period.
3. Click onto Transaction to check if each payment amount is the same as the billing amount. If not, you need to go to the patient to adjust the amount first (refer to notes on Adjust Bulk Billing). If all the amounts in the Transaction are correct, exit out of the Transaction list.
4. Click onto Payment, and then New Payment. A Bulk Billing Transaction list will be displayed.

Important: When you are entering a new payment, always click “New Payment”, do not just “Modify” an old payment record.

5. In the list, tick the ones the payment is for, or click “Mark all Transactions as Paid” if the payment is for all transactions, or “Mark all Transactions as Paid for 1 Provider” if the payment is for all transactions of 1 provider.

Important: Only tick the transaction if the amount is the exact amount it is paid for. If not, you must go back to the patient to adjust the amount first (refer to notes on Adjust Bulk Billing). Do not just modify the amount in the Bulk Billing Transaction List.

6. Then click “Save Changes”. The total of the transactions ticked and their GST will be displayed in the Bulk Billing Payment screen.
7. In the Bulk Billing Payment screen, enter the Optometrist Code, Payment Type, Cheque No etc. Then Save. *(The default Payment Type, and the Bank and Branch of Cheque can be set up in Bulk Billing Account screen under Financial.)*

Adjusting Bulk Billing (Non-Patient Rebate)

On receiving payment from Medicare or Veterans Consultation, sometimes a patient’s claim is paid as a different Item, e.g. 10907 instead of 10900. The adjusting procedure is slightly different depending whether the claiming is manual or electronic:

For Manual or Non-electronic claims

(e.g. Veterans – Consult)

1. Under Financial, click onto Bulk Billing/Payment. For example, select V – Veterans Consult. Click onto Prev until you find the period that the cheque is paying for. Write down on a piece of paper what the Billing No is, e.g. B00123.
2. Go to find the patient. Then create a **NEW** Billing record with today’s date:

By	Qty	Item No	Amount \$
V	-1	10900	- 50.00
V	1	10907	30.00

After saving the Billing record, press Ctrl F12 to bring up a screen where you can change the Bulk Billing No to the old one you wrote down for **both entries**. Then save.

Because these 2 entries are both new ones with today’s date and no old bills are modified, the figures of old reports remain the same.

3. Go back to Financial, Bulk Billing/Payment and Veterans-Consult. Then click onto Prev to go to the period that the cheque is paying for. Click onto Payment and then New Payment. A list of transaction of this period will be displayed. You will find the patient you just changed now has 3 entries:

Old date	50.00
Today	- 50.00
Today	30.00

Tick the ones the cheque is paying for or click onto “Mark all transactions as Paid” if the cheque is paying for the whole lot. Then click onto “Save Changes” near the bottom of the screen. The Payment Amount will then be calculated in the Bulk Billing Payment screen. Click onto “Save” at the top Toolbar.

Just moving an entry from one bulk billing period to another period does not affect the figures of any old reports, because the original billing date and amount are not changed.

To Re-submit as Another Item with a Higher fee:

e.g. instead of accepting 10907, re-submitting as 10912

Go to find the patient. Create a **NEW** Billing record with today’s date:

By	Qty	Item No	Amount \$
V	-1	10907	- 30.00
V	1	10912	50.00

These 2 entries goes to the current period for submitting. The net value of his claim is \$20.00

Electronic Medicare Claims

- Under Financial, click onto Bulk Billing/Payment. Select M – Medicare. Click onto Prev until you find the period that the cheque is paying for. Write down on a piece of paper what the Billing No is, e.g. B00123.
- Go to find the patient. Then create a **NEW** Billing record with today’s date:

By	Qty	Item No	Amount \$
M	-1	10900	- 50.00
M	1	10907	30.00

After saving the Billing record, press Ctrl F12 to bring up a screen where you can change the Bulk Billing No. Change the Bulk Billing period number of **only the credit** entry (-50.00) to the old period number you wrote down on the piece of paper.

By	Item No	Amount \$	Bulk Billing No
M	10900	- 50.00	Old period
M	10907	30.00	Current period

3. Go back to Financial, Bulk Billing/Payment and Medicare. Then click onto Prev to go to the period that the cheque is paying for. Click onto Payment and then New Payment. A list of transaction of this period will be displayed. You will find the patient you just changed now has 2 entries that cancel off each other:

Old date	50.00
Today	- 50.00

Tick the ones the cheque is paying for or click onto “Mark all transactions as Paid” if the cheque is paying for the whole lot. Then click onto “Save Changes” near the bottom of the screen. The Payment Amount will then be calculated in the Bulk Billing Payment screen. Click onto “Save” at the top Toolbar.

4. In the current period, this patient should have one entry:

Today	30.00
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You can then re-submit this patient’s claim together with the new ones.

Note:

This method takes a little bit longer to enter. However, because no old record is changed, therefore, all reports of the old period will remain unchanged.

Alternate Method

This is an easier but NOT a proper “account” method. This is done by modifying the old item number for the claim and then transfer that claim with the modified item from the old period to the current period, where you can re-submit it together with the new claims:

- Under the Financial menu, click onto Bulk Billings & Payments. Then select Medicare.
- Go back to the Billing Period corresponding to the patient’s rejected claim.
- Click onto the Transaction button to bring up the list of claims for that period.
- Highlight the patient and click onto the “Modify Item-No” button to change the Item number and then save it.
- With the same patient still highlighted on the list, click onto the “Transfer Selected Entry to Current Period” button. Then click onto Yes to confirm the transfer.
- Close the Transaction screen. Go to the Current period and then click onto Transaction of the Current period. You will find the patient with the modified item in the list, which you can submit as usual.

Important:

Because the item number and fee of the original date has been changed, all Billing reports of that period would be changed as well. If you are on “Accrual” system, or if you have already run any billing reports for that period, you should NOT be using this method, instead you should use the first method by creating a new record and making a reversal entry.

Adjusting Bulk Billing Patient Rebate

This applies to Bulk Billing Accounts that are set up as Patient Rebate (in Bulk Billing Account under Financial, Patient Rebate = Y), possibly VJ – Veterans Jobs.

When the payment you receive turns out to be different to what you claimed. If you are not going to refund or ask the patient for the difference, as a general rule, you reverse the last one and re-bill a new one:

1. Under Financial, click onto Bulk Billing/Payment, select e.g. VJ. Click onto Prev until you find the period that the cheque is paying. Note down the Billing No, e.g. B00123.
2. Go to find the patient. Then create a **NEW** Billing record with today's date:

By	Qty	Item No	Health fund Description	Amount \$
PL	-2	212	Single Vision Stock Lenses	- 20.00
VJ	-1	OP02	VA Rebate for SV Stock Lenses - Near	20.00

Because normal rebate entries in the Patient's Billing screen are shown as negative, the reversal of a rebate becomes negative of a negative amount, therefore positive. After save, press Ctrl F12 to bring up the Bulk Billing Batch No screen to change the Bulk Billing Period to the old one you wrote down:

VJ	OP02	20.00	Old Period
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Because this is a new record with today's date and no old bills are modified, the figures of old reports remain the same. Just moving an entry from one bulk billing period to another period does not affect the figures of any old reports.

3. Then create another **NEW** Billing record with today's date:

By	Qty	Item No	Health fund Description	Amount \$
PL	2	222	Single Vision Grind Lenses	45.00
VJ	1	OP04	VA Rebate for SV Stock Lenses - Near	-45.00

After save, press Ctrl F12 to change the Bulk Billing Period to the old one as well:

VJ	OP04	- 45.00	Old Period
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- Go to Financial, Bulk Billing/Payment and Veterans-Jobs. Click onto Prev to go to the period that the cheque is paying for. Click onto Payment and then New Payment. A list of transaction of this period will be displayed. You will find the patient you just changed now has 3 entries:

Old date	OP02	20.00
Today	-OP02	- 20.00
Today	OP04	45.00

Tick the ones the cheque is paying or click “Mark all transactions as Paid” if it is paying for the whole lot. Then click onto “Save Changes” near the bottom of the screen. The Payment Amount will then be calculated in the Bulk Billing Payment screen. Click onto “Save” at the top Toolbar.

Barta Card

Set up

- Go to Financial - Bulk Billing Accounts, enter a New record:

Account Code	BA
Vision Description	Barta Card
Patient Rebate	Y

- Then go to Maintenance - Item No Details, enter the following New records for Barta:

Paid By	BA	BA	BA
Item No	FRAME	LENS	CL
Description	Barta Rebate for Frame	Barta Rebate for Lenses	Barta Rebate for CL
Tax %	10	0	0
Quantity	1	1	1
Report Group	FRAME	LENS	CL

Usage

- Enter a Spectacle record as usual, and then create the Billing as usual, i.e. all amount charges to the patient first:

By	Qty	Item No	Health Fund Description	Tax %	Amount \$
PF	1	110	Spectacle Frame	10	220.00
PL	2	312	Bifocal Lenses		80.00
PL	2	632	Lens Tinting		20.00

2. Then, in the next line of the same bill, enter in the Bulk Billing Rebate (BA), which will come up as negative figures. If the Barta card is paying for the whole bill, the Rebate amounts will be exactly the same as the charges, hence leaving a nil patient balance. If the Barta card is only paying for part of the bill, there will be a balance for patient to pay.

By	Qty	Item No	Health Fund Description	Tax %	Amount \$
PF	1	110	Spectacle Frame	10	220.00
PL	2	312	Bifocal Lenses		80.00
PL	2	632	Lens Tinting		20.00
BA	1	FRAME	Barta Rebate for Frame	10	- 220.00
BA	1	LENS	Barta Rebate for Lenses		- 100.00
Patient Closing				Balance \$	0.00

Note:

- Lens Add-ons such as tinting and coating can use "LENS" rebate.
- The Frame Rebate cannot be more than the Frame charge; CL Rebate cannot be more than the CL charge; and Lens Rebate cannot be more than the total Lens charges (including lens add-ons).

Important: If the Barta Rebate is entered in a different bill to the original bill where the charges are, then at the top right hand corner of the Bill of the Rebate, you must "Link this Discount/Rebate to Bill", by entering the Billing Number of the original bill of the charges (You can press F5 or right-mouse click for the Pick List).

3. "Account Statement" can be printed from the patient's Billing or Payment screen.
4. The Rebate amount will then be accumulated under Financial - Bulk Billing/Payment (not Banking). You need to close the Bulk Billing period regularly e.g. every 3 months, and go to "Transaction" to print a report of all the Barta you have collected.

Important: This is the figure you must report to ATO for Tax and GST even though you have not physically received the money.

Outstanding Accounts

This is a report of all outstanding amounts owing to the practice, including the amount from patients and bulk billings. Only Bulk Billing claims that are sent (i.e. Closed Bulk Billings) are included in this report, not the current ones that are not closed yet. The "Col" column indicates whether there is a pair of spectacles or contact lenses in the practice for the patient to collect. "Spec" indicates the patient has not collected the spectacles yet, and "CL" indicates the patient has not collected the contact lenses yet.

On the Financial Menu, just click onto the “Outstanding Accounts” option with the mouse. The Outstanding Accounts list will be displayed.

Petty Cash

Petty Cash Code

Code given by practice in order to break up petty cash payments e.g. PO = postage.

Petty Cash Entry

- **If Petty Cash is set up to be deducted from Banking**
(in Billing/Banking Details under Maintenance)
 1. No float is needed.
 2. Money is taken out from the day's takings and Petty Cash details to be entered in Vision
 3. In Banking: Cash Deposited = Cash Received - Petty Cash
 4. Only need to print a Petty Cash Summary Report by Petty Cash Code once a year for the whole financial year.
- **If Petty Cash is set up not to be deducted from Banking**
(in Billing/Banking Details under Maintenance)
 1. Start with a float (e.g. \$50.00).
 2. Money is taken out from the float and Petty Cash details to be entered in Vision.
 3. Petty Cash does not affect the Banking totals.
 4. Print a **Petty Cash Report** (by Date or by Code) for the period of time (e.g. once a week), whenever a cheque is written for the money spent.

NOTE

A cheque is written for the amount shown on the Petty Cash Report, i.e. the amount spent, not for the full amount of the float (not \$50). This way, the cheque amount plus the left-over float should always equal to the original float amount (\$50).

NOTE

Unlike Banking which you can close at anytime, Petty Cash Reports are full-day reports. Therefore, make sure the Petty Cash Reports are run either first thing in the morning (with a report End Day of the previous date) or last thing in the day (with a report End Day of today's date)

Petty Cash Report

The Petty Cash Report may be requested to either report

- Petty Cash transactions in order by date of entry
- Group by Expense Code ; or
- Summary by Expense Code

Expense

This screen is to be used for all expenses of the practice e.g. cash, credit cards, cheques etc.

In Expense screen, you can click onto the Print button at the top Toolbar for expense reports in Date order, Expense Group or Cheque Number.

Billing Item/Cash Sale Report

The Billing Item/Cash Sale Report shows the bills or invoices issued by the practice over the nominated period of time. It is sorted in Report Groupings set up for each items under Maintenance – Item No Details.

Billing Item Report by Provider

The Billing Item Report by Provider shows the bills or invoices issued by the practice for each Provider over the nominated period of time. It is sorted in Report Groupings set up for each items under Maintenance – Item No Details.

Medicare Billing Item Summary Report

The Medicare Billing Item Summary Report shows the breakdown of bulk billings for the nominated period of time. For each item number billed, the report shows the number of times it was billed, the overall percentage of times it has been used and the total amount billed for that item number.

Medicare Billing Item Report by Provider

The Medicare Billing Item Report by Provider shows the breakdown of bulk billings for the nominated period of time, grouped by the optometrists. For each item number billed, the report shows the number of times it was billed, the overall percentage of times it has been used and the total amount billed for that item number.

Billing Summary

The Billing Summary is a summary report of all billing for a specified period.

Billing Search by Item No

This search for Bills that contain the Item Number nominated.

Detail Payment Report

This shows the breakdown of the payment received by the practice during the nominated period of time. It is broken down into Report Groupings set up for each items under Maintenance – Item No Details

Payment Summary

This gives a summary of payments received during a specified period. It is broken down into Report Groupings set up for each items under Maintenance – Item No Details

Practice Summary - Weekly

This summary reports every aspects of the practice, including Incomes, Sales,. Petty Cash, number of Patients and no of Consultations. It shows figures for the 4 or 5 weeks of a month. The weeks run from Monday through to Sunday.

Practice Summary

This summary reports every aspects of the practice, including Incomes, Sales,. Petty Cash, number of Patients and no of Consultations for the nominated period of time.

Detail Billing/Payment Report

This report shows a listing of both the billing and payment records for the nominated period of time.

Deleted Billing/Payment Report

This is a report of Patient's Bill/Pay and Cash Sale records that are marked with "Status" as "Deleted".

NOTE

- If Bill/Pay/Cash Sale under Login Id is set up for N (users can only add New records) or E (users can add new or Modify old records), records will stay marked with "Status" as "Deleted" even after they are deleted by the user. The deleted records will show up in the Deleted Billing Report.
- If Bill/Pay/Cash Sale under Login Id is set up for R, records will be Removed after being deleted by the user. The deleted records will not show up in the Deleted Billing Report.

(See notes on Login Id & Password under Maintenance.)

Report Grouping Setup

The Report Grouping setups are very important in how the reports categorise the figures. Go to Maintenance, then Item No Details, make sure the Report Groupings are correct for all items. The Payment reports categorise the figures according to the Report Grouping of the Item Numbers:

Report Grouping in Maintenance	Grouping in Payment Reports
Consult	Consult
Frame	Frame
Lens	Lens
CL	CL
(anything else)	Misc

The Groupings "Sunglasses" and "Sundry" in the Payment reports come from Inventory.

Important:

- Do not have group called "Spec" which is neither Frame nor Lens.
- "Discount" has to be split up to "FDiscount" and "LDiscount"

Paid By	P	P
Item No	FDISCOUNT	LDISCOUNT
Description	Discount on Frame	Discount on Lens
Tax %	10	0
Report grouping	FRAME	LENS

- "Credit" etc also needs to be split into frame and lens.
- For Bulk Billing items, you also need to separate them into Frame and Lens.

- For better reporting, each group must contain either all taxable or all non-taxable items. Because any Report Groupings other than Consult, Frame, Lens and CL will go to "MISC", you need to make "MISC" either all taxable or all non-taxable. Therefore, if you want to make "MISC" all taxable, any non-taxable items must be grouped as "Consult", "Lens" or "CL".
- Because Tinting, Coating etc are non-taxable item, they should not be grouped as "Misc" which is taxable. They should be grouped as "Lens" instead.
- For taxable contact lenses such as non-prescription tinted contact lenses, they should not be grouped as "CL" which is non-taxable. They should be grouped as "MISC" instead.
- Similarly for taxable spectacle lenses such as non-prescription tinted lenses, they cannot be grouped as "Lens" which is non-taxable. They should be grouped as "MISC" instead.
- For Sundries, all items will go to the "Sundry" column unless the Sundry Group begins "CL" which will go to "CL", or "Lens" which will go to "Lens". Therefore, to make all amounts in the "Sundry" column taxable, you need to set up any non-taxable sundry items with a Sundry Group of either "CL" or "Lens". Taxable sundry items cannot have Sundry Group begin with "CL" or "Lens", which are non-taxable.

Business Activity Statement (BAS)

The Vision reports for filling in a Business Activity Statements (BAS) are:

GOODS AND SERVICES TAX (GST)

G1 & G3 (Total Sales & GST-free Sales)

If the GST Accounting method is "Cash"

- Financial

- Payment Summary (should also check Detail Payment Report)
 - G1 = Total Receipt (incl or excl GST)
 - G3 = Non-taxable Amount

If the GST Accounting method is "Accrual"

- Financial

- Billing Item / Cash Sale Report
 - G1 = Total Billing (incl or excl GST)
 - G3 = Items with no GST

G10 & G11 (Capital & Non-Capital Purchases)

- Financial
 - Expense Payment Reports
 - Summary Report by Group (should also check Detail Payment Report by Group)

PAYG INCOME TAX INSTALMENT

T1 (PAYG Instalment Income)

If the Income Tax Accounting method is “Cash”

- Financial
 - Payment Summary (should also check Detail Payment Report)
 - T1 = Total Receipt (excl GST)

If the Income Tax Accounting method is “Accrual”

- Financial
 - Billing Item / Cash Sale Report
 - T1 = Total Billing (excl GST)

Note: *All incomes (including Bank Interest, Share Dividend etc.) and all expenses (including Bank Fees etc.) should be entered in Vision so that they will be included in the reports for BAS.*

Year-end Reports

The Vision reports for your accounts are:

Banking

Banking Transaction, or Banking Transaction – Daily EFTPOS Breakdown
(*Note: All incomes including Bank Interest needs to be entered – as patients*)

Outstanding Accounts

Outstanding Account Summary (Taxable./ Nontaxable)
(*Note: this report can only be printed on the day, therefore MUST be printed on 30th June*)

Expense Payment

Detail Payment Report by Cheque No
(*Note:*

- *All expenses including Bank Fees needs to be entered*
- *If credit card is to be used instead of cheque, when paying the supplier, first enter the credit card type at “Cheque # / Payment Ref”, e.g. VISA. Then when paying the Credit Card, add the cheque number in front of the credit card type at the “Cheque # / Payment Ref”, e.g. 100045VISA)*

Inventory

Detail Frame Stock Report

Detail Sundry Stock Report

(Note: these report can only be printed on the day, therefore MUST be printed on 30th June)

Important

All the incomes and expenses must be reconciled under Banking Reconciliation against your Bank Statement to ensure all entries are correct. After reconciled, the Banking Reconciliation Report from Vision should be exactly the same as your Statement from the Bank.

End of Financial Year Procedure

Before the Last Day of Financial Year

1. Stocktake
 - It is recommended NOT to leave Stocktake till the last day of the financial year. Stocktake can be done a few days or weeks BEFORE.
 - After Stocktake, make sure you adjust stock quantity in Vision, so that the stock quantity in Vision is exactly the same as what is in the store. *(As long as you adjust the quantity, there is no need to keep a manual record of what you sold after the stocktake. On 30th June, all you need to do is to print a Detail Stock Report.)*
2. Trial run of all the reports that you will run on the last day of the Financial Year (see below) to make sure everything will work.

On the Last Day of Financial Year (after Closing)

1. Close Banking period
2. Close all Bulk Billing periods
3. Print Outstanding Account Report under Financial
4. Print Detail Stock Reports for Frames
5. Print Detail Stock Reports for Sundries
6. Print Supplier Invoice/Credit Summary Report under Financial (leave the Dates and Supplier Code blank)
7. Backup Vision. These backup disks should then be labelled and dated, put away and not to be re-used again.

Important:

You must print those reports on the last day of financial year (30th June), not afterwards, because you cannot backdate those reports.

Chapter Seven

Consultation

The consultation screens are for storing information about consultation details of a patient. There are 6 types of consultation screen:

- Customizable Consultation screen
- Spectacle Consultation (Version V2K)
- Spectacle Consultation (Version 5)
- Spectacle Consultation 2 (Version 5)
- Short Spectacle Consultation
- Contact Lens Consultation & Order

You can have as many consultation records for a patient as you want. All consultation records are stored together even if the consultation records are of different screen types.

The first Consultation screen is customizable to suite the way you do consultation: Fields can be moved around or taken out. SUNIX will do the customization for you, and we offer one free customization per Maintenance year

On the Toolbar at the top of the screen, just click onto the "Consult" option with the mouse, or type "C" on the keyboard. If the patient has consultation record(s) entered before, the consultation with the most recent date will be displayed. If the patient has no consultation records entered, a blank Spectacle Consultation screen will be displayed.

Once a consultation record is opened, a new Menu option will appear on the top of Vision, called Consult. This Menu allows you to open new spectacle and contact lens consultations and contact lens orders.

Spectacle Consultation

To start a new Spectacle Consultation, click with the mouse onto the Consult button and then New. Select the screen layout you want and a blank spectacle consultation record will appear.

NOTE

When you have finished the Spectacle Consultation, if you are going to dispense the spectacles to the patient, click onto the Spec button and then onto the New button to create a new spectacle order record. The prescription which is entered

in the Spectacle Consultation screen in the “GI” (given) fields will be automatically carried over into the Spectacle order screen.

Fields of Spectacle Consultation screen

You can bring up the Pick List of a field by pressing F5, right-mouse click or double-click. For a Tablet PC, you can also double-tap to bring up a Pick List. In a lot Pick Lists, multiple selection can be made at the same time.

Some of the fields of the Spectacle Consultation screen are as follows:

Consult Date This stores the date of the consultation and defaults to today's date. Press Enter to accept the date displayed, or type the desired date over it. Pressing Alt-C will cause the cursor to jump to the Consult Date field.

Consult Item This stores the Item Number or code of the consultation. Pressing F5 will bring up the pick list of consultation items.

Recall Date The second field here stores the date the recall is due. It defaults to a date which is calculated from the "Consult Date" and the "First Recall Period" set up from the Default Parameters of the Maintenance menu. Press Enter to accept the default Recall Due date, or type a new date over it. The first field stores the period of time when the next recall is due. For example, if the patient is to return in seven months, typing 7M will change the recall date to seven months from the consult date. Also, 1Y will change the date to a year from the consult date and 5W changes the date to five weeks from the consult date.

Medication / Allergy

Medication and Allergy default from the last consultation, and can then be modified if changed. The Allergy box will turn red if there is anything in it.

Pupils / Symptom / Ophthal / Biomicr

This stores information about the pupil reactions, symptoms, ophthalmoscopy and biomicroscopy. Each one of the tests can have up to four codes. F5 can be used to display a Pick List of the codes for picking. The description of the code is in the Pick List. Pressing Alt-P will take the cursor to the Pupils field.

More notes can be entered after the four codes. For symptoms, ophthalmoscopy and biomicroscopy, the note field is unlimited in space. The notes can be expanded by clicking onto the triangle next to the note with the mouse. After the notes are entered, press F9 to save and exit from the note screen.

Visual Field / Colour Vision

This stores information about the visual fields and colour vision tests. These fields are unlimited in space. The notes can be expanded by clicking onto the triangle next to the note with the mouse. After the notes are entered, press F9 to save and exit from the note screen.

Other tests (Blank fields)

The three lines after "Col Vision" are for other tests. Just type the test name in. The result of the test can be entered in the field to its right. These fields are unlimited in space. The notes can be expanded by clicking onto the triangle next to the note with the mouse. After the notes are entered, press F9 to save and exit from the note screen.

Rx

This stores information about the types of prescription, e.g. PR for "Previous Rx", SU for "Subjective Rx" and GI for "Given Rx". F5 can be used to displayed a list of Rx for Picking. For Tablet PC, Prescription Bars can be brought up by double-tapping on the Sphere, Cyl, Axis, VA, Add and Inter. You can enter in a prescription by just double-tapping onto the Prescription Bars

There is also a note box for every Rx, for information such as the date (or how old) and the use of the glasses or Rx.

Buttons in Spectacle Consultation screen

Buttons are hot keys for special functions during adding or Modifying. The function can be executed by just clicking onto the button by the mouse, or pressing the Function Key on the keyboard corresponding to the button. The buttons in the Spectacle Consultation screen are as follows:

Drawing

This allows the optometrist to enter diagrams of findings. There are several templates to choose from: external views of the eyes (R, L and both) and the fundus (R and L). To view a previous drawing, the drawing must be selected and Modify Previous Drawing clicked with the mouse.

Prev Rx

This display a list of previous Given Prescriptions for the patient. If "GI" or Given Rx is entered as an additional Given Rx, it will also get listed in the "Prev Rx". In other words, that extra Given Rx can be selected in the Spectacle screen via the "Prev Rx" button

Overview

To displayed a summary of the consultation, spectacle and contact lens records of the patient.

K Reading

To go to the K Reading screen.

SU to GI

To copy the Subjective Rx to the Given Rx.

History	To display a list of history records of the patient and for looking at and Modifying old history records or inserting new ones. The history records can be used for creating a patient list for sending newsletters.
Code	To display a list of Patient Code records of the patient and for looking at and Modifying old history records or inserting new ones. The Patient Code can be used for creating a patient list for sending newsletters.
Binocular	To display another screen for recording result of binocular test.

Drawings / Image

The Images button shows a listing of images associated with the selected patient record

To Add a New Drawing

1. Click on the Images button on the top Toolbar.
2. click on New Drawing with the mouse. A list of Drawing Templates appears.
3. Use the arrow keys or the mouse to select a drawing then press Enter or click on Select Drawing with the mouse.
4. A description for the drawing will appear which you can change if you wish.
5. To accept the name, click on OK.
6. Using the menu options on the left side of the screen, depict the clinical findings. If you do not know how to use Paint, refer to the Help file by clicking Help then Help Topics on the top menu of Paint.
7. When you have finished modifying the drawing, click File then Exit to close Paint. You will be asked to save the changes.

Contact Lens Consultation Only

(This shows just the top window of the Contact Lens Consultation & Order screen)



This window stores information about the consultation related to the contact lens displayed at the bottom window. In other words, this can be used for entering fitting, delivery or aftercare visits.

NOTE

You can have many consultation records for the same Lens Order record.

Fields of Contact Lens Consultation

The fields are places where the actual data of the screens are stored. Some of the fields of the Contact Lens Consultation window are as follows:

Consult Date	This stores the date of the consultation and default to today's date. Press Enter to accept the date displayed or type the desired date over it.
Consult Item	This stores the Item Number or code of the consultation.
Recall Date	This stores the date the recall is due. It defaults to a date which is calculated from the "Consult Date" and the "First Recall Period" set up from the Default Parameters of the Maintenance menu. Press Enter to accept the default Recall Due date or type a new date over it.
Notes	This can store information about any tests and their results. This field is unlimited in space. The information in this field can be scrolled up or down by clicking the  or  button on the scroll bar at the right.

Buttons in Contact Lens Consultation window

Buttons are hot keys for special functions during adding or Modifying. If the cursor is already in the screen, the function can be executed by just clicking onto the button by the mouse, or pressing the Function Key on the keyboard corresponding to the button. The buttons in the Contact Lens Consultation window are as follows:

Prev Rx	To display a list of the patient's previous Given Prescriptions.
Overview	To displayed a summary of the consultation, spectacle and contact lens records of the patient.
K Read	To go to the K Reading screen.
New Lens	To link the displayed Consultation record to a new Lens record.
Link Lens	A list of previous Lens records will be displayed for selecting. The selected Lens record will be linked to the displayed Consultation record.

History	To display a list of history records of the patient and for looking at and Modifying old history records or inserting new ones. The history records can be used for creating a patient list for sending newsletters.
Code	To display a list of Patient Code records of the patient and for looking at and Modifying old history records or inserting new ones. The Patient Code can be used for creating a patient list for sending newsletters.

Contact Lens Order Only

This window stores information about the contact lens repeat orders. It can be accessed by either clicking onto the CL button at the top toolbar, or through Consult - New - CL Order Only.

NOTE

Certain letters on the Contact Lens Order screen are underlined. By pressing Alt and the underlined letter, the cursor will jump to that field. eg. ALT-R →right CL Code, ALT- T → Tint etc.

Fields of Contact Lens Order window

The fields are places where the actual data of the screens are stored. Some of the fields of the Contact Lens Order window are as follows:

CL Ref No	Each Contact Lens Order is allocated a unique Reference Number by Vision.
Status/Order	<p>This indicates the status or order status of the lens. F5 can be used to display a Pick List for Picking. The date after the status (if any) indicates the date the order is placed to the Supplier. To enter today's date, press the spacebar. The different types of status are as follows:</p> <ul style="list-style-type: none">• CAS means per case Order• EOR means Exchange Order• LEN means per lens Order• NOR means New Order• TRI means Trial fitting• USE means In Use (i.e. the lens is an old lens) <p>If the Status is NOR or EOR and the date is blank, that means the lens has not been ordered from the supplier yet.</p>

Collect	This indicates whether the lens was collected (COL) or returned (RET) or being trialed (TRI) or being used (USE). The date after that indicates the date the lens was collected, returned, trialed or used.
Others	This stores information about other charges.
Cleaning	This stores information about the cleaning system of the lenses. The details can be entered in the first line and/or the 3 coded fields on the second line. F5 can be used to displayed a Pick List of Cleaning System codes for picking.
Pat Instru	Note of instructions given to patient.
Lab Instru	This stores the instructions to the laboratory or supplier, such as ASAP.
CL Ready	This indicates the date the contact lenses are ready for delivery. A blank date means the lenses are not ready yet.
Notified	This indicates the last time the patient was notified that the lenses are ready, and the number or times the patient has been notified. A blank date means the patient has not been notified.lens has not been ordered from the supplier yet.
Collect	This indicates whether the lens was collected (COL) or returned (RET) or being trialed (TRI) or being used (USE). The date after that indicates the date the lens was collected, returned, trialed or used.
Create Bill	To create bill for this order.

Contact Lens Consultation & Order

The Contact Lens screen is for storing information about contact lens consultations and orders. The screen consists of two windows: the Contact Lens Consultation in the top window and the Contact Lens Order in the bottom window. The two records on the two windows are linked to each other. The Consultation window stores information about the consultation for the lenses displayed at the bottom. The Lens Order window stores information about the lenses for the consultation displayed at the top.

Ordering of Contact Lenses

Any Contact Lens Order record with Status = CAS (per Case order), LEN (per Lens order) or EOR (Exchange Order) will be considered as an order. When you first enter an order, do not put in the Supplier Order Date. Then you can print the Order to Supplier (from the patient's Contact Lens Order screen). Once the order is printed, you will be asked "Have the lenses been ordered". Clicking to Yes will put today's date in the Supplier Order Date field, which will prevent double ordering the lenses again. But if you want to re-print the order, all you need to do is to empty the Supplier Order Date. Then, it will allow you to re-print.

If you do not want to order the lenses one at a time under the patient's Contact Lens Order screen, you can order them in groups from the Ordering list under Dispensing of the top menu. First leave the Supplier Order Date of the patient's Contact Lens Order screen blank. Any orders with a blank Supplier Order Date will show up in the Ordering list, where you can print all orders or one supplier's orders. Once the lenses are ordered, click onto the Yes button or press Y to mark down them off. Marking an order Yes will automatically put today's date in the Supplier Order Date field. Orders with a Supplier Order Date will not show up in the Ordering list next time you run the Ordering list.

Chapter Eight

Spectacle

The Spectacle screen is for storing information about spectacle details of the patient. Each record is for one pair of spectacles. You can have as many spectacle records for a patient as you want.

On the Toolbar at the top of the Patient Details screen, just click onto the "Spec" button with the mouse. If the patient had spectacle record(s) entered before, the record with the latest date will be displayed. If the patient has no spectacle records entered, a blank The Spectacle screen will be displayed. To start a new Spectacle record, just click onto the "New" button with the mouse.

As soon as the frame is entered or scanned in, it will be displayed the frame photograph if the frame has a photograph stored under Inventory - Frame Details.

Fields of Spectacle Details screen

The fields are places where the actual data of the screens are stored. Some of the fields of the Spectacle Details screen are as follows:

Job Date This will default to Today' Date. Press Enter to accept the date displayed or type over it with a different date.

Spec Due It is the date the spectacles are due for collection. It will default to a date which is calculated from the Order Date and the Spectacle Due default set up in the Default Parameters of the Maintenance menu. Press Enter to accept the displayed date or type over it with a different one.

Rx Date / Rx by / PD / Rx Comment (not labelled)

All these fields default from the last Spectacle Consultation. Type over with other data if needed.

Use This stores the uses of the spectacles:

D	Distance
N	Near
I	Intermediate
B	Bifocals
T	Trifocals
M	Multifocals

F5 can be used to display a Pick List of options.

Frame Code	<p>There are three ways of entering frame details in the Spectacle record:</p> <ol style="list-style-type: none">1. If a new frame is used and it is already in the database, just enter the Frame Code in, and the frame details will be displayed.2. If a new frame is used and it is already in the database, but you forgot or lost the Frame Code, just press F5 to search in the Pick List. Then, the frame details will be displayed.3. If a patient's own frame is used, skip the Frame Code, and just type the frame details in.
Lens Code	<p>This stores the code for the lens type and material used. Type the desired Lens Code in, or press F5 to display the Pick List for picking.</p>
Extra 1, 2, 3	<p>They are used for extras or add-ons such as tinting, coating, hardening etc</p>
Lens Sup	<p>This stores the supplier code for each lens. Type the code in or press F5 to display the Pick List for picking</p>
Order Date	<p>This stores the Order Date of the lenses. If there is no Order Date, that means the lenses are not ordered yet. There are two ways of putting the Order Date in:</p> <ol style="list-style-type: none">1. Mark the lens ordered in the "Ordering - Spectacle & Contact Lens" screen of the Dispensing menu (see notes on Dispensing).2. Just type the Order Date in the Spectacle Details screen.
Lens Price	<p>The Lens Price will be displayed automatically when the Lens Code is entered. Press Enter to accept it, or type another price over it.</p>
Discount, Total	<p>The Total will be calculated automatically. Press Enter to accept it or type over it with another price. Then, the Discount will be calculated automatically for the modified Total. Vice versa, enter the Discount in and the Total will be calculated automatically for the Discount.</p>
Billing No	<p>This stores the Billing/Payment No of the Billing record that is created from, or linked to the Spectacles.</p>

Buttons of Spectacle Details screen

The buttons of the Spectacle Details screen are as follows:

Prev Rx	This shows a list of all previous Given Prescriptions from the Consultation screen of the patient. When entering new spectacle or modifying old ones, you can select from this Prev Rx list for the Spectacle record.
Job Ready	<p>This indicates whether the job is ready for collection, and the date it is ready. If there is no Job Ready date, that means the job is not ready yet. There are 3 ways to mark the spectacle is ready:</p> <ol style="list-style-type: none">1. On the Dispensing Menu, in the Spectacle Ready screen, mark the job as ready.2. Click onto the "Job Ready" button on the Spectacle Details screen.3. Just type a date on the : "Job Ready" field of the Spectacle Details screen.
Notified	<p>This indicates the date the last time the patient was notified that the job is ready, and the number of times the patient has been notified. If there is no Notified date, that means the patient is not notified yet. There are two ways of marking the spectacles are notified:</p> <ol style="list-style-type: none">1. Increment the number of times the patient has been notified on the Spectacle Ready screen of the Dispensing Menu. Then Today's date will be used as the date of last notification.2. Click onto the : "Notified" button in the Spectacle Details screen.
Collected	<p>This stores the date when the patient collected their spectacles. If there is a no Collected date, that means the patient has not collected the spectacles yet. There are three ways to mark the spectacles are collected:</p> <ol style="list-style-type: none">1. Click onto the "Collected" button on the Spectacle Details screen.2. Click onto the "Collect Spectacle" button on the Spectacle Ready screen of the Dispensing Menu.3. just type a date on the "Collected" field of the Spectacle Details screen.
GST	Gives the breakdown of GST charged

Spectacle Printouts

The followings are printouts related to the Spectacle record:

Print Spectacle Record

This prints out a jobbing sheet for the practice. The jobbing sheet contains all the details entered into the Spectacle details screen, including Patient Phone number, prices and all Extras.

Print Lens Order

This option allows you to print a Lens Order to send to the Lab. This only contains information that the lab needs to know. There is no Patient Phone number nor prices. Only Extra that the lab is doing will show up in this printout.

Prescription

This prints the prescription for the Spectacle record. For example, if the Spectacle Record is a pair of readers, this option will only prints the Near Rx.

Purchase Order (Full details)

This prints the purchase order of the patient. It shows full frame and lens details.

Purchase Order (Code only)

This prints the purchase order of the patient. It shows the frame and lens codes only, without the full details.

Spectacle Quote (Full Details)

This prints the Spectacle quote for the patient. It shows full frame and lens details.

Spectacle Quote (Code Only)

This prints the Spectacle quote for the patient. It shows the frame and lens codes only, without the full details..

Sunglasses Sale

There are three methods of selling sunglasses :-

1. Normally, frame sales are entered in the Spectacle Details screen and it is from the Spectacle Details screen that the stock gets deducted.
 - Therefore, when billing is created, it is created as “PF” and stock will NOT get deducted again from the Billing screen, otherwise, it will get deducted twice
2. When sunglasses are sold and is not entered in the Spectacle screen, it can be entered directly into the Billing screen as a Sundry item. When it is entered in as “PS”, then stock WILL get deducted from the Billing screen (as indicated on the green Usage Line at the top of the Billing screen).
 - At the “By” column, type in “PS” and then press “Enter”. Then, at the “Prod Code” column, you can press F5 for the Pick List of either Sundries or Frames/Sunglasses.
3. Alternatively, sunglasses can be sold in the Cash Sale screen, and stock will get deducted from there.

Chapter Nine

Dispensing Management

This option is for the dispensing management of the whole practice. On the top menu, just click onto "Dispensing" with the mouse. A pull-down sub-menu will be displayed, showing the following options:

- Ordering - Spectacle & Contact lenses
- Spectacles Not Ready
- Spectacles Ready
- Spectacle Collected
- Find Spectacle Job record
- Contact Lens Not Ready
- Contact Lens Ready
- Spectacle Remake/Wastage Report
- Spectacle Type Report
 - Spectacle Discount Report

Ordering - Spectacle & Contact Lens

This screen shows a list of spectacle and contact lenses that need to be ordered.

Headings on the Spectacle & Contact Lens Ordering List

In the Ordering List for Spectacle and Contact Lenses, some of the headings are as followings:

Ordered	This indicates whether the lens has been ordered (Yes) or not (No). To mark a lens has been ordered, change "No" to "Yes" by just typing "Y". Then, on the corresponding Spectacle or Contact Lens Details screen, the Order Date of the lens will
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automatically display today's date, indicating the lens was ordered today.

Lens Type For stock spectacle lenses, this shows the Lens Code of the Spectacle Details screen. For grind spectacle lenses, the word "Grind" is displayed; and for contact lenses, the words "Cont Lens" are displayed.

Size/Sph/Cyl/Add For stock spectacle lenses, this shows the exact details that are on the Spectacle Details screen. But for grind spectacle lenses and contact lenses, these fields will be left blank.

Function Keys of the Ordering screen

Function keys are hot keys on the keyboard for special functions. The function can be executed by pressing the Function key on the keyboard. The function keys on the Ordering screen are as follows:

Display Job takes you to spectacle screen of job highlighted.

Y Ordered=Yes To mark that the lens is ordered

NOTE

the lens is marked "ordered", today's date will be put in as the Order Date in the Lens Details screen. Next time when the Ordering List is created again, that lens will not be shown in the list (because it has already been ordered).

N Ordered=No To mark that the lens is not ordered yet.

Print To print a copy of the report

E-Order To electronically place order

Fax To fax order to supplier

Close. To return to patient details

Spectacle Not Ready

This shows a list of spectacles that are not ready for collection yet i.e. the jobs are still being made.

Buttons of the Spectacles Not Ready screen

The buttons on the Spectacles Not Ready screen are as follows:

Display Job To display the corresponding Spectacle Details screen of the job which is highlighted.

Job Ready for Collection

To mark the spectacle (the one which is highlighted) as ready for collection.

NOTE

Once the job is marked "ready", today's date will be put in as the Job Ready Date in the Spectacle Details screen. The job is immediately moved off the Spectacle Not Ready list and into the Spectacle Ready list of the Dispensing menu.

Print Print copy of report

Close To exit from the Spectacles Not Ready screen. (You can also press the Escape key.)

Spectacle Ready

The Spectacle ready screen shows a list of spectacles that are ready for collection and a record of the notification of patients that their spectacles are ready. This list only includes the spectacles that are ready but not yet collected.

Headings of the Spectacles Ready List

In the Spectacles Ready list, some of the headings are as followings:

No of Times Notif This indicates whether the patient has been notified (1-9) or not (blank) that their spectacles are ready.

Last Notif This shows the date of the last time the patient was notified.

Buttons of the Spectacles Ready screen

The buttons on the Spectacles Ready screen are as follows:

Display Job To display the corresponding Spectacle Details screen of the job which is highlighted.

Increment Times Notified

To increase the number of times the patient has been notified.

NOTE

Once a notified time has been incremented, today's date will be put in as the Last Notified Date in the Spectacles Ready list and in the corresponding Spectacle Details screen.

Collect Spectacle

To mark the spectacle (which is highlighted) as collected.

NOTE

Once the job is marked as "collected", today's date will be put in as the Collected Date in the Spectacle Details screen. Also, that job is immediately taken off the Spectacles Ready list and put into the Spectacle Collected list of the Dispensing menu.

Print

To print a copy of this report

Close

To exit from the Spectacles Ready List. (You can also press the Escape key.)

Spectacle Collected

This shows a list of spectacles that have been collected and allows for follow-up of patients.

Headings on the Spectacle Collected List

In the Spectacle Collected list, some of the headings are as followings:

Job Date

The date the job was created.

Collected

The date the job was collected.

Buttons of the Spectacle Collected screen

The buttons on the Spectacle Collected screen are as follows:

Display Job

To display the corresponding Spectacle Details screen of the job which is highlighted.

Follow Up Completed

To mark off the list that follow-up has taken place.

NOTE

Once the job is marked "follow up completed", the job will be taken off the list.

Close

To exit from the Spectacle Collected screen. (You can also press the Escape key.)

Find Spectacle Job Record

This screen is for finding a particular Spectacle Details record by using the Job Number. (A job can also be found by bringing up the patient's details and then clicking on the "Spec" button) To find a spectacle job by its job number, just perform the following steps:

1. On the Dispensing Menu, just click onto the "Find Spectacle" option with the mouse. The Find Spectacle screen will be displayed.
2. Type in the Job Number and then press OK. The Spectacle Details screen of that job will then be displayed.

Contact Lens Not Ready

This shows a list of contact lenses that are not ready for collection yet, i.e. the contact lenses are still being ordered.

Headings on the Contact Lens Not Ready screen

In the Contact Lens Not Ready list, some of the headings are as follows:

Due Date	The date entered in the contact lens order screen in the Due Date field.
R /L Supp	The supplier code for either the right or the left contact lens.

Function Keys of the Contact Lens Not Ready screen

Function keys are hot keys on the keyboard for special functions. The function can be executed by pressing the Function key on the keyboard. The function keys on the Contact Lens Not Ready screen are as follows:

Enter Display Job To display the corresponding Contact Lens Details screen of the job which is highlighted.

Job Ready for Collection

To mark the Contact Lens (which is highlighted) as being ready for collection.

NOTE

Once the lens is marked "ready", today's date will be put in as the CL Ready Date in the Contact Lens Details screen. The contact lens will be removed from the Contact Lens Not Ready list and placed on the Contact Lens Ready list.

Close

To exit from the Contact Lens Not Ready List.

Contact Lens Ready

This shows a list of contact lenses that are ready for collection and a record of the notification of patients that their contact lenses are ready. This list only includes the contact lenses that are ready but not yet collected.

Headings on the Contact Lens Ready screen

In the Contact Lens Ready list, some of the headings are as follows:

No of Times Notif This indicates whether the patient has been notified (1-9) or not (0).

Last Notif This shows the date of the last time the patient was notified.

Function Keys of the Contact Lens Ready screen

Function keys are hot keys on the keyboard for special functions. The function can be executed by pressing the Function key on the keyboard. The function keys on the Contact Lens Ready screen are as follows:

Display Job To display the corresponding Contact Lens Details screen of the job which is highlighted.

Increment Times Notified

To mark the number of times the patient has been notified.

NOTE

Once a number is entered in, today's date will be put in as the Last Notified Date in the Contact Lens Ready list and in the corresponding Contact Lens Details screen.

Collect Contact Lens

To mark the Contact Lens (which is highlighted) as being collected.

NOTE

Once the lens is marked "collected", today's date will be put in as the Collected Date in the Contact Lens Details screen. And that job will go off the Contact Lens Ready list immediately.

Close

To exit from the Contact Lens Ready List.

Spectacle Remake/Wastage Report

This report shows the cost price of frames and lenses of jobs which have had to be remade during a nominated period time. It provides a means for measuring the cost to the practice for remakes of jobs.

Headings on the Spectacle Remake/Wastage Report

In the Spectacle Remake Report, some of the headings are as follows:

Job-No	The spectacle job reference number.
Pat-Ref	The patient reference number. This can also be used to find the job. In “Open Patient File”, enter the patient reference number.
Disp/Pres	The codes for the dispenser and the optometrist. The Spectacle Remake report is grouped by the combination of these two codes.

Spectacle Type Report

The Spectacle Type Report shows the spectacles dispensed during a nominated period of time which are of a specified Job Type (ie quote, remake etc).

Headings on the Spectacle Type Report

In the Spectacle Type Report, some of the headings are as follows:

Status	The type of job (eg. quoted, practice warranty). This is determined from the Job Type field of the Spectacle screen.
Job-No	The spectacle job reference number.
Presc/Disp	The codes for the dispenser and the optometrist. The Spectacle Remake report is grouped by the combination of these two codes.

Spectacle Discount Report

The Spectacle Discount Report shows all the spectacle jobs within a nominated period of time where a discount has been given. The report is grouped according to the reason for the discount. Some of the fields on the report are as follows:

Reason for Discount

The reason for the discount being given. The reasons for giving discounts can be set up under Maintenance → Pick List → Spectacle – Reason for Discount.

Status	The status of the job ie. remake, collected etc
Frame Price	The advertised price of the frame.
Original Sale Price	The price calculated on the spectacles.
Discounted Sale Price	The actual price the spectacles were sold for.
Discount	This is shown both as a dollar value and as a percentage.
Job Cost	The cost price of the spectacles.
Profit	The profit made by the practice on the job.

Chapter Ten

Inventory Control

This menu option is for storing information about frames, sundries and other inventory control functions.

Frame details

This option is for storing information about frame details. You can have as many frame records as you want. The shortcut keys Control-F can be used to access the Frame details screen quickly. When you access Frame details, a new Menu appears at the top of Vision called “Frame”.

Fields of Frame Details screen

The fields are places where the actual data of the screen is stored. To Modify the data of any field on the screen, just click the Modify button on the top Toolbar and then click onto the field you want to Modify. To enter a new Frame Record, click on the New button on the top Toolbar and enter the frame details.

Some of the fields of the Frame Details screen are as follows:

Frame Code This code can be assigned to each frame by Vision or assigned by the practice. (See Maintenance – Dispensing/Frame Setup for further details about how to change the way frame code is assigned.) The code combines the Supplier code and a number generated by Vision which is unique to each frame.

Note

A frame will have the same Frame Code (i.e. considered as the same stock) only if the brand, model, colour, size and temple are all the same.

Supplier This field stores the code for the frame supplier. The function key F5 can be used to display a Pick List for choosing the correct Supplier. New Suppliers can be entered in Supplier’s details under Inventory.

Brand/Model/Frame Type

This stores the Brand, Model and Frame Type of the Frame. The function key F5 can be used to display a Pick List for the Brand, Model and frame Type.

Curr List Price	This stores the Current Cost Price Listed of the stock, which may or may not be the same as the Current Cost Price Paid.
Curr Cost Price	This stores the Current Cost Price Paid of the stock.
Prev Cost Price	This stores the Previous Cost Price Paid of the stock.
Ave Cost Price	This stores the Average Cost Price Paid of the stock and is calculated by Vision.

Reorder to Desirable Level

This is one of the two ways to set the Reorder Quantity for reordering when a Re-order Report is created. For example

Reorder to Desirable Level	5
Stock on Hand	3
Reorder Quantity	2

Reorder when less than

This is one of the two ways to set the Reorder Quantity for reordering when a Re-order Report is created. For example

Reorder when less than	5	Qty	5
Stock on Hand	3		
Reorder Quantity	5		

NOTE

Only one of the re-order methods can be used. In both of the above examples, the stock will show up in the Reorder Report when stock quantity is less than 5. But the Reorder Quantity of the first example is 2 while that of the second example is 5.

To Add New Frame record

For adding a Frame record, just perform the following steps:

1. Select the "Frame Details" option from the "Inventory" Menu by clicking the mouse on the option or by keying Control-F. The Frame Details screen will be displayed.
2. From the top Toolbar of the screen, select the "New" option by clicking the mouse on the option.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. During adding, the F5 function key can be used to display Pick Lists of data.
6. After entry is finished, press F9 to save the record.

7. To exit from this screen back to the previous screen, just press Esc on the keyboard or click onto the X on the top right corner of the Frame record.

To Modify Previous Frame record

For Modifying a previous Frame record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Tool bar.
 - Using the "Prev" or "Next" option on the top ToolBar
2. Click onto the Modify button with the mouse. .
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the F5 function key can be used to display Pick Lists of data.
6. After Modifying is finished, press F9 to save the record.
7. To exit from this screen back to the previous screen, just press Esc on the keyboard or click onto the X on the top right corner of the Frame record.

Frame Photograph

In the Frame screen, a photograph can be attached to each frame for identification. Both web-cam and digital cameras can be used. However, digital camera usually gives pictures of higher resolution which means the files size would be a lot bigger. Since frame photographs do not need to be high resolution, web-cam is more suitable for this purpose.

Setup

1. Take note of the default folder that your camera put the photographs in.
2. In SUNIX Vision, go to Maintenance - Dispensing Frame Setup. At “Frame Image Folder”, enter the default folder where your camera put the photographs (you can right click to bring up the Directories to select).

To attach a photograph:

1. Take a photo of the frame using the software that came with the webcam or digital camera.
2. Find the frame and then right-click onto the photo box at the bottom right to select the frame photograph. *(To make it easier to identify which photo to select, click onto the “View Menu” button at the top right and select ‘Thumbnails’.)*

Usage

- In the Spectacle screen, the frame photographs will be displayed at the bottom right as soon as the frame is selected.
- During Frame Stocktake by Barcode, the frame photographs will also come up at the bottom when the frame is scanned.
 1. Setup - “Frame Image Folder” (right click on the text line to set the folder).

To Search for Frame

Click on Inventory either on top Toolbar or of Quick Menu. Select Frame details then go to List on top Toolbar. There are two ways to find the frame you are searching for:

1. By scanning the Barcode of a frame:
Just by scanning the Barcode of a frame, it will automatically open that Frame record, provided you are not in the process of entering a Spectacle, Billing or Cash Sale record, in which cases the frame will be selected for entry.
2. By Brand & Model in the Frame List:
In the Frame List, ensure that the first Brand column is highlighted (i.e. the Brand is in white writing on colour highlight), and then start typing name of brand. The “incremental search” feature will take you to the Brand you want as your type. Often only the first few characters are enough to take you to the Brand you want. Then press the right arrow key on the keyboard to highlight Model column (i.e. the Model is now in white writing on colour highlight) and again type in Model. The “incremental search” feature will take you to the Model you want as your type
3. By Frame Code in the Frame List
In the Frame List, either click onto the “Sort by Frame Code” button or press the Right arrow twice to highlight the Frame Code (i.e. the Frame Code is in white writing on colour highlight). Then start typing the Frame Code. The “incremental search” feature will take you to the Frame Code you want as your type.

Setting up Barcoding

1. Install the Barcode Fonts *(must do this on EVERY computer if running a network)*

My Computer - Control Panel - Fonts - File - Install New Font - Folders (double click onto the drive where Vision is and then select **V2K**) - List of Fonts (BC Code 39 and BC Interleaved 25 Narrow) - Select All - OK

2. Try to print a frame barcode

Start Vision, and go to Frame Details under Inventory. Select any frame (enter one in if there isn't any). With the Leading Edge of the barcode label sheet facing the right way, click to **Frame** and then **Print Bar Code for this Frame**. Enter in the number of labels to skip

- if the sheet of labels is a brand new one, no of labels to skip is 0
- if you want to re-use an old sheet of labels, e.g. 10 labels have already been used, then the no of labels to skip is 10

Note: it is upto the user whether to re-use old label sheets or not. There is a possibility that glue may come off from old sheet where labels have been peeled off. The printer manufacturer may not be responsible for any problems caused by re-using old label sheets, and it may even void the printer warranty.

3. Change the Printer, Paper Tray or Size *(if necessary)*

- In Vision, go to Maintenance, Report Configuration
- List, Select Frame Bar code Label
- Click onto the Printer Destination button
- Click onto OK in the first warning screen
- In the Print Setup screen, you can change the Printer and PaperSource. The Paper size should be A4 and Orientation should be Landscape.
- In the Page Setup screen, no need to change anything. Just click OK

4. Modify the Design Layout of the Printout *(optional)*

- In Maintenance - Report Configuration - Frame Barcode Label - Printer Destination, after checking the Print Setup screen and clicking OK in the Page Setup screen, you can modify the design layout in the Report Designer screen.
- In the Report Designer screen, you can click onto whichever box you want to move or delete, then press the arrow key on the keyboard to move it or the delete key to delete.
- When finished, click onto the X at the top right hand corner of the Report Designer screen. It will then ask you to save. Click onto Yes to save.

5. Adjust the Position of the Barcode *(if necessary)*

Try to position the barcode (not the writings) roughly in the middle of the labels. If you need to adjust the position of the barcodes, go to Maintenance - Barcode Labels Setup. Please note down what were the settings before you make any changes, just in case you want to put it back.

- If the first label printed too close to the edge of the label, adjust the Left Margin, only by 0.1 or 0.2cm at a time (increase the Left Margin will move all labels to the right; decrease the Left Margin will move all labels to the left).
- If the first label is correct, but they get shifted as it get to the right side of the page, adjust the Width. Decreasing the Width will move labels to the left; and increasing the Width will move labels to the right. *Please note that you should only change the width by a fraction of a millimetre, because any change you make will be multiplied by 13 (because there are 13 labels across the page).* **For Avery L7651 labels, the Width should be 2.1200cm.**

6. Test scanning Barcodes

In Vision, close all patients or other windows. Get back to the white screen with just the Quick Menu. Scan a Frame barcode, the Frame detail screen of that frame should come up automatically.

Important: You should test scanning a few barcodes first before printing large quantity of barcodes.

Print Frame Barcodes

Print Bar Code by Purchase Date

1. Enter the whole delivery of frames first, and print the barcodes altogether
2. Enter the Start Date & End Date (usually today's date).
3. Check through the list. If you want to change the quantity of barcodes to be printed, just type the new quantity in BC Qty

(Changing BC Qty in the Barcode Printing List only affects the printing, does not actually change the quantity of the actual stock.)

4. When the list is ready, click onto Print Barcode Labels
5. Enter in the number of labels to skip
 - if the sheet of labels is a brand new one, no of labels to skip is 0
 - if you want to re-use an old sheet of labels, e.g. 10 labels have already been used, then the no of labels to skip is 10

Note: it is up to you whether to re-use old label sheets or not. There is a possibility that glue may come off from old sheet where labels have been peeled off. The printer manufacturer may not be responsible for any problems caused by re-using old label sheets, and it may even void the warranty.

Print Bar Code for this Frame

(for re-printing a worn out label)

- Just enter in the number of labels to skip.

Print Bar Code by Order of Entry

(most commonly used method)

1. A list will be display showing the frames by Order of Entry (the new ones are at the bottom of the list).
2. Select the ones you want to print, by either ticking them, or ticking the first and last one and then click onto End Printing on.
3. The quantity of barcodes to be printed for any frame can be changed by just typing the new quantity in.

(changing the quantity in the Barcode Printing List only affects the printing, does not actually change the quantity of the stock.)

4. When the list is ready, click onto Print Barcode Labels.

Options of the Frame Menu

When you the Frame details screen is open, there is an extra option in the top menu called Frame, where you can restock, adjust quantity, run reports etc.

Adjust Frame Quantity

To adjust the quantity of the stock because of reasons other than re-stock:

1. Select the frame you want to adjust by either clicking on the List button or on the Frame Menu, choose Select Frame. Then choose the frame from the list that you wish to adjust the stock level of.
2. Go to Adjust on the Frame Menu and the adjustment screen for the selected frame code will appear.
3. Change 'Stock Quantity on hand' by either clicking on the up and down arrow keys or by simply typing the new number in.
4. Enter 'Reason for Adjustment' by pressing F5 to bring up the pick list for Frame Adjustment and select the appropriate reason for frame adjustment.
5. The 'Adjustment Date' defaults to today's date but can be changed if necessary.
6. Enter a note into the 'Note' field if you require it.
7. Save the change either by clicking Save or by pressing F9.

Delete a Frame Record

To delete a frame record, perform the following steps:

1. Select the frame record for deletion either by clicking on the "List" button or using the "Select frame" option.
2. If the stock on hand is not zero, account for where the frame/s are and what you will do with the frame/s.
3. Adjust the stock on hand to zero if necessary.
4. Go to "Delete record" on the File Menu. A message will appear, "Delete this record?" Click on 'Yes'.
5. The next frame record in the database will now appear.

NOTE

The stock on hand must be zero before a frame detail record can be deleted.

History – Sale & Purchase of a Frame

History – Sale & Purchase shows a history of the selected frame, showing the date and quantity of when the frame was purchased, re-stocked, adjusted or sold:

1. Select the frame record for viewing the history either by clicking on the “List” button or using the “Select frame” option.
2. Go to “History – Sale & Purchase” on the Frame Menu.
3. The history of the selected frame will be displayed.

Restock of a Frame

The restock option allows you to restock the selected frame:

1. Select the frame record for restocking either by clicking on the “List” button or using the “Select frame” option.
2. Go to “Restock Frame” under the Frame Menu.
3. Enter the details into the “Restock frame” screen.
4. Click on Save or press F9 to save the Restocked record.

Formula for Calculating Retail Price

The Formula for Calculating Retail price is used to calculate the retail price on all frame records. All frame records have a suggested price shown in blue writing next to the ‘Retail Price’ field on the Frame Details record which is calculated from the formulae entered into ‘Formula for Calculating Retail Price’.

Following is an example of how the formulae should be entered:

From \$ 0	To \$ 50	Retail Price = List Price Ex Tax X 2.00 + 50.00
From \$ 50	To \$ 100	Retail Price = List Price Ex Tax X 2.00 + 30.00
From \$101	To \$200	Retail Price = List Price Ex Tax X 2.00 + 10.00
From \$201	To \$ 999	Retail Price = List Price Ex Tax X 2.00 + 0.00

Price Range for Summary Reports

The Price Range for Summary Reports is to allow you to enter the price ranges you wish summary reports to categorise the figures by. There are five price range options

to enter. The following example illustrates how Summary Reports will be run if the following figures are entered at this screen.

Frame Price Range 1 \$ 100
Frame Price Range 2 \$ 150
Frame Price Range 3 \$ 200
Frame Price Range 4 \$ 300
Frame Price Range 5 \$ 400

If these figures are entered, the Summary reports will show the break down of sales figures for the practice as follows:

<=\$100
\$100-\$150
\$150-\$200
\$200-\$300
\$300-\$400
\$>\$400

Frame - Detail Stock Report

This report shows a detailed listing of all the frames in stock. The report can be restricted by Supplier, Brand, Frame Type, Frame Group, Frame Status or Location.

Frame - Stock Report (Depreciated Cost Price)

This report shows a detailed listing of all the frames in stock with their Depreciated Cost Price. The report can be restricted by Supplier, Brand, Frame Type, Frame Group, Frame Status or Location.

Frame - Summary Stock Report

This shows a summary of frames in stock for different Price Range and Frame Type.

Frame - Re-order Report

This report shows the frame stock which needs to be reordered according to the pre-set desirable level. The “No on order” is the number of frames already ordered but not arrived yet. The “Order Qty” is the number of frames you wish to order.

Frame - Price List

This report displays the prices of the frames. in the selected categories. The report can be restricted by Supplier, Brand, Frame Type, Frame Group, Frame Status or Location

Frame - Aging Report

This is an ageing report of the frames in stock. It gives you information about whether the frame is a good selling frame or not.

Frame - Detail Usage Report

This shows a detail listing of frames sold.

Frame - Detail Usage with no RRP \$

This shows a detail listing of frames sold minus the Recommended Retail Prices..

Frame - Summary Usage Report

This shows a summary of frames sold for different Price Range and Frame Type.

Frame - Combined Purchase & Usage Report

This report shows purchase of frames and the number in stock over a nominated period of time.

Frame - Purchase Summary from Supplier

This report shows a break-down of frame purchases by the different suppliers.

Frame - Due for Return

The Frame – Due for Return Report shows the frames which are due for return to the supplier, i.e. the ones that the “Return By” date has past.

Frame - Ordering from Usage

This shows a list of frames sold where you can mark the ones for ordering. To help you to decide which frames to reorder, for each frame listed the report shows the following parameters:

- Number of Frames on Order
- Number of Frames Sold
- Number of Frames in Stock

Date of Last Sale

Date of Last Purchase.

In the patient's Spectacle screen, if "To Reorder" is entered as Y or N, this will update the "To Order" field in the Frame details in screen. This will also show up in the "Ordering from Usage"

Frame on Order

After saving the order from the "Frame Ordering from Usage", the order will show up in the "Frame On Order", where you can restock the frames directly from the list (one at a time). After restocking from "Frame On Order", the "To Reorder" in the Frame Details screen will get cleared

Frame Stocktake without Barcode

1. Under Inventory, go to the Frame / Sundry Details screen. Then click onto the Frame/Sundry option at the top menu. At the drop-down menu, select "Detail Stock Report". If you leave all boxes empty, this will give you all your stock in the computer.
2. Stocktake manually by marking off the printout.
3. When finish, if there are any variance, click onto the Frame/Sundry option at the top menu and then "Adjust" to adjust the quantity to the correct level.
4. Re-print the Detail Stock Report.

Frame Stocktake with Barcode

1. Go to Inventory, then Frame Stocktake by Barcode
2. Then "Start a new Stocktake for Frame", and click OK. The Scan frame screen will come up automatically
 - During stocktake, you can exit out of Scan Frame and do other things such as printing receipts etc. When you go back to stocktake, make sure you do **NOT** click onto "Start a new Stocktake for Frame" again, just go straight to "Scan Frames"
 - If any barcode does not scan, just type the Frame code in instead

- Half-way through stocktake, if you find a frame that is not even entered in the computer, do not enter it in yet and do not scan that frame for stocktake. Wait until you finish the whole stocktake before you enter that frame in. Frames that are entered in after you “Start a new Stocktake for Frame” will not be recognised for stocktake scanning
 - During the stocktake, you can check the progress by going to the Frame Stocktake Progress Report.
3. When finished, run the Stocktake Variance Report to find out the variance from expected stock levels.
 4. Go to Frame Details under Inventory to find the frames that are in the Variance Report. "Adjust" the quantity and enter in a reason, such that the computer will now show your actual stock.
 - *It is important to adjust the stock straight after Stocktake. Otherwise, the Stock Report will show the wrong figures, and the same variance will come up again next stocktake.*
 - *Stock Adjustment can be setup to be password protected for all or some of the staff by setting the Login Id under Maintenance*
 - *Adjustment report can be printed for stocks that are adjusted, grouped by the reason for adjustment.*
 5. Go to the Frame option under Frame Details, then print the **Frame - Detail Stock Report**, which should now show the correct stock level in the computer.

Note: If you want a Stock Report, do not print the Frame Stocktake Report under Frame Stocktake by Barcode, because it is only a progress report showing what you have scanned, not what stock you actually have.

Sundry details

The Sundry details screen, found under Inventory menu, stores details of sundry items such as: contact lens solutions, lens cloths, spectacle chains. You can have as many records as you want. The shortcut keys Control-Y can be used to access the Sundry details screen quickly. When you access Sundry details, a new Menu appears at the top of Vision called “Sundry”.

Fields of Sundry Details screen

The fields are places where the actual data of the screen is stored. To Modify the data of any field on the screen, just click the Modify button on the top Toolbar and then click onto the field you want to Modify. To enter a new Sundry Record, click on the New button on the top Toolbar and enter the frame details.

Some of the fields of the Sundry Details screen are as follows:

Sundry Code This is a code assigned to each sundry stock.

NOTE

The Sundry Code has to be unique for each type of sundry stock.

Supplier This field stores the code for the frame supplier. The function key F5 can be used to display a Pick List for choosing the correct Supplier. New Suppliers can be entered in Supplier's details under Inventory.

Curr List Price This stores the Current Cost Price Listed of the stock, which may or may not be the same as the Current Cost Price Paid.

Curr Cost Price This stores the Current Cost Price Paid of the stock.

Prev Cost Price This stores the Previous Cost Price Paid of the stock.

Ave Cost Price This stores the Average Cost Price Paid of the stock and is calculated by Vision.

Reorder to Desirable Level

This is one of the two ways to set the Reorder Quantity for reordering when a Re-order Report is created.

For example

Reorder to Desirable Level	5
Stock on Hand	3
Reorder Quantity	2

Reorder when less than

This is one of the two ways to set the Reorder Quantity for reordering when a Re-order Report is created.

For example

Reorder when less than	5	Qty	5
Stock on Hand	3		
Reorder Quantity	5		

NOTE

Only one of the re-order methods can be used. In both of the above examples, the stock will show up in the Reorder Report when stock quantity is less than 5. But the Reorder Quantity of the first example is 2 while that of the second example is 5.

Add New Sundry record

For adding a Sundry record, just perform the following steps:

1. Select the "Sundry Details" option from the "Inventory" Menu, by clicking the mouse on the option or typing Control-Y on the keyboard. The Sundry Details screen will be displayed.
2. From the top Toolbar of the screen, select the "New" option by clicking the mouse on the option, or by typing Control-N.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. During adding, the F5 function key can be used to display Pick Lists of data.
6. After entry is finished, press F9 to save the record.
7. To exit from this screen back to the previous screen, just press Esc on the keyboard or click onto the X on the top right corner of the Sundry record.

Modify Previous Sundry record

For Modifying a previous Sundry record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Toolbar.
 - Using the "Prev" or "Next" option on the top ToolBar
2. Click onto the Modify button with the mouse, or type Control-M for Modifying with the keyboard.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the F5 function key can be used to display Pick Lists of data.
6. After Modifying is finished, press F9 to save the record.
7. To exit from this screen back to the previous screen, click onto the X button at the top right hand corner of the screen, or press Esc on the keyboard.

Use Manufacturer's Barcodes for Sundry

(for Sundry items that come with manufacturer's barcode)

1. Go to the Sundry Details screen
2. Either enter a New Sundry product or Modify the Sundry record if it is already entered in the computer.
3. Click to the Supplier Bar Code, and then scan the manufacturer's barcode on the box of that product.
4. Press Enter and then Save the record.

Print Sundry Barcodes created by Vision

(for Sundry items that do not have manufacturer's barcode)

1. Go to the Sundry Details screen
2. Click onto the Sundry option of the top menu, and then
 - Print Barcode for this Sundry Item, or
 - Print Barcode by Order of Entry
3. If you need to change the Printer or Paper Tray, or to modify the design layout, go to Maintenance, Report Configuration. Click onto List to Select Sundry Barcode. Then click onto Printer Destination.
4. If you need to adjust the margins or width of the report, exit out of Vision and double click onto the Sundry Barcode Configuration icon. **For Avery L7651 labels, the Width should be 2.1200cm.**

Options of the Sundry Menu

When you the Sundry details screen is open, there is an extra option in the top menu called Sundry, where you can restock, adjust quantity, run reports etc.

Adjust Sundry Stock Quantity

To adjust the quantity of the stock because of reasons other than re-stock:

1. Select the Sundry Item you want to adjust by either clicking on the List button or on the Sundry Menu, choose Select. Then choose the sundry item from the list that you wish to adjust the stock level of.

2. Go to Adjust on the Sundry Menu and the adjustment screen for the selected sundry code will appear.
3. Change 'Stock Quantity on hand' by either clicking on the up and down arrow keys or by simply typing the new number in.
4. Enter 'Reason for Adjustment' by pressing F5 to bring up the pick list for Sundry Adjustment.
5. The 'Adjustment Date' defaults to today's date but can be changed if necessary.
6. Enter a note into the 'Note' field if you require it.
7. Save the change either by clicking Save or by pressing F9.

History - Sale & Purchase

History – Sale & Purchase shows a history of the selected sundry item. It displays a history of the sundry item showing the date and quantity of when the sundry item was purchased, re-stocked, adjusted or sold:

1. Select the sundry record for viewing the history either by clicking on the "List" button or using the Select option on the Sundry Menu.
2. Go to History – Sale & Purchase on the Sundry Menu.
3. The history of the selected sundry item will be displayed.

Restock

The restock option allows you to restock the selected sundry item:

1. Select the sundry record for restocking either by clicking on the List button or using the Select option.
2. Go to Restock under the Sundry Menu.
3. Enter the details into the Restock screen.
4. Click on Save or press F9 to save the Restock record.

Select Sundry List

This option is used to select a sundry record.

Sundry Stock Report

The Sundry Stock Report shows the break down of all the sundry items in stock. The items in the report can be sorted and displayed either according to: Brand & Description, or by Code.

Sundry Re-order Report

The Sundry re-order Report shows the number of Sundry items which need to be re-ordered according to pre-set desirable level

Sundry Price List

The Sundry Price List shows the prices of all the sundry items in stock

Sundry Aging Report

The Sundry Aging Report shows the last purchase date of all the sundry items in stock.

Sundry Usage Report

The Sundry Usage Report shows the difference between the purchase price for sundry items and the sale price for sundry items. At the end of the report the Gross Profit and the Gross Margin overall are calculated.

The **Gross Profit** is shown as a percentage and is calculated by dividing the profit by the purchase price paid by the patient.

The **Gross Margin** is shown as a percentage and is calculated by dividing the profit by the cost of the sundry item paid for by the practice.

Sundry Ordering from Pre-Set Level

This screen displays a list of sundries that are below the pre-set level, i.e. need to be re-ordered. You can then modify the number to order and then print the order.

Restock from Previous Order

After saving the order from the "Sundry Ordering from Pre-set Level", the order will show up in the "Restock from Previous Order" where you can enter "No to Restock" to restock multiple items and then Process Order all at the same time

Adjustment Report

The Adjustment Report shows changes which have been made to the stock which is recorded under inventory. That is, for frames, lenses and sundries, it reports on adjustments such as: stock being returned to supplier, stock recorded as broken or lost, stock which is transferred to a branch. Anytime a staff member adjusts stock, this will appear in the Stock Adjustment Report.

Headings of the Adjustment Report

Some of the headings of the Adjustment Report are as follows:

Type	This shows the type of stock which was adjusted ie. frame, lens or sundry.
Reason	This shows the reason the stock was adjusted.
Date	the date the adjustment was made.
Qty	The number of items within that category which were adjusted.
Staff Name	<p>This will either be the Login ID or the staff code of the person who adjusted the stock. This depends how you have set up the login ID under Maintenance.</p> <p>NOTE</p> <p>To show the staff name of the person who made the adjustment, under Maintenance → Login ID, set up 'Y' at 'Staff Password on Stock Adjustment', then setup a staff code and password for every staff member.</p>
Cost \$ & RRP\$	The cost price and the retail price of the item.
Note	Any notes made during the adjustment are displayed on the report.

Frame Approval

This is to record the frames a patient takes home for approval before the purchase. Under Inventory, there are different Frame Approval reports including the "Frame Approval History (by Pickup Date)" which shows all the frame approval records sorted by Pickup Date.

To Enter a Frame Taken by Patient for Approval

Go to the Patient Detail screen, click onto the "Frame App" button to bring up the Frame Approval screen. Click onto New to enter a new Frame Approval record.

For frames that are in stock:

Enter the Frame Code, then the RRP, Pickup Date and Frame Due Date will appear. Modify the Frame Due Date if necessary. This will put the frame in “Frames Due for Return by Patient” in Frame Approval under Inventory. Stock will get deducted automatically.

For frames that are not in stock and needs to be ordered in:

Enter the Frame Code, then the RRP will appear. Enter the Order Date and the Supplier Due Date. This will put the frame in the “Frames Due for Delivery from Supplier” in Frame Approval.

When the frame is delivered from the supplier,

1. go to Frame Details under Inventory to Restock. (If the frame is on consignment only, enter the Return By Date. This will put the frame in the “Frames Due for Return” in Frame Approval or in the Frame Details screen),
2. then go to “Frames Due for Delivery from Supplier” under Frame Approval, Edit the Frame Approval record to enter the Date Received. This would put the frame in the “Frames Due for Pickup by Patient”.

When the patient picks up the frame, go into the Patient and to the Frame Approval screen. Select the Frame Approval record and edit to enter the Pickup Date and Frame Due Date. This will put the frame in “Frames Due for Return by Patient” under Frame Approval. Stock will get deducted automatically.

To Mark off a Frame Returned by Patient

When the patient returns the frame, go into the Frame Approval screen under patient, Edit the Frame Approval record. Click onto the Date Returned button, and today’s date will come up automatically. This will automatically put the frame back in stock.

Print Lenscode Barcodes

1. In Vision - Maintenance- Lens Code & Item No
2. For the lenscode you want to print barcode (the ones that are used more often), Modify the record and set "Include in Bar Code Listing" to be "Y"
3. Check the Price List Grouping is already set up and save the record.
4. Print Barcode. The nominated barcodes will be printed under the Price List Grouping.

Print Lens Code Price List

Select Inventory on top menu. The Print Price List for Lens Code option allows you to print a price list of all the lenses in stock.

Chapter Eleven

Patient Letters / Images

Writing a Patient Letter

1. Select the patient you wish to create the letter for.
2. Click the Letter button on the top Toolbar.
 1. Click on New Patient Letter.
 2. Use the arrow keys or the mouse to select the required letter format.
 3. Click on 'Create New Patient Letter'.
 4. A description of the letter appears. You can change this name if you want to, then press Enter or click on the OK button with the mouse.
 5. A pick list of ophthalmologists, doctors and optometrists will appear. Use the arrow keys or mouse to select the correct person to send the letter to.
 6. Then either click the Select button with the mouse, press Enter.. The letter will then be generated in Microsoft Word.
 7. Add the details to the letter and use Microsoft Word's Modifying features to format the document.
 8. Save the letter and exit the document.

View/Modify a Previous Letter

1. Select the patient you wish to create the letter for.
2. Click the Letter button on the top Toolbar.
3. Use the arrow keys or the mouse to select the required letter and click on Modify Previous Letter with the mouse.
4. Add the details to the letter and use Microsoft Word's Modifying features to format the document.
5. Save the letter and exit the document.

Basic Scanning

Letters from doctors etc can be scanned into Vision and stored against the patient for viewing. The image is scanned as JPEG files.

Requirement:

- a lot of free hard disk space; as well as
- a backup system that can handle large volume

Procedure:

1. In Vision, open the patient, click onto the “Image” button at the top Toolbar.
2. Click onto New Image.
3. Highlight “Photo.jpg” and then click onto Select (*contact SUNIX if you only have Photo.bmp*)
4. Type in the Drawing Description. This will automatically open a blank JPEG file for the patient.
 - If you are scanning your document now, scan it into Paint or the Image Editor you set up (as JPEG), then Copy & Paste it back into the patient’s blank JPEG file
 - If the document has already been scanned and saved, from the patient blank JPEG file, click “Edit” and “Paste from” (for Windows Paint).
5. If it says the image is larger, just click Yes to enlarge
6. Save the JPEG file and then exit out of Paint or the Image Editor

Viewing:

1. Lateron, if you want to go back to view the scanned document, click onto the “Image” button of the patient.
2. Highlight the one you want and click onto “Edit Previous Image” or “Edit Image with Paint” (do not just double-click onto the picture which would not magnify enough)

Note:

By default, Vision uses Windows Paint for Images/Drawing. But Windows Paint display in quite high magnification. In other words, your Windows resolution has to be at least 1024x768 or higher. If your image is too magnified, you can either:

- *Go to the setup of your scanned software to reduce the default resolution, e.g. 300 dpi; or*
- *Increase the Windows resolution (and everything else would look smaller as well), or*
- *At the Paint image, click onto the “Image” option at the top toolbar, and then onto “Stretch/Skew”. At “Stretch”, reduce both the Horizontal and Vertical, e.g. to 60% (if you ever want to print it, the printout will be smaller as well), or*
- *Use a different Image Editor other than Windows Paint. If you have a different Image Editor, you can set up Vision to use that Image Editor instead, by going to Maintenance - Consultation Setup to enter in “Program to use for editing Images” (right-click for the Path/Browse list).*

Scanning with Image Importer

Usage

1. Go to the patient you want to import images for, click onto Instrument Interface (Inst IxFace).
2. Then click onto the “Import Images” button.
3. Check that the images you want to import are there (un-tick the ones you do not want to import).
4. By default, the images will be removed from that temporary folder after the import.
5. By default, Vision will prompt to ask the description/name for each image imported. (If you do not want a description/name, just un-tick that box.)
6. Then click onto “Import & Close”.

Viewing:

3. Lateron, if you want to go back to view the scanned document, click onto the “Image” button of the patient.
4. Highlight the one you want and click onto “Edit Previous Image” or “Edit Image with Paint” (do not just double-click onto the picture which would not magnify enough)

Note:

By default, Vision uses Windows Paint for Images/Drawing. But Windows Paint display in quite high magnification. In other words, your Windows resolution has to be at least 1024x768 or higher. If your image is too magnified, you can either:

- *Go to the setup of your scanned software to reduce the default resolution, e.g. 300 dpi; or*
- *Increase the Windows resolution (and everything else would look smaller as well), or*
- *At the Paint image, click onto the “Image” option at the top toolbar, and then onto “Stretch/Skew”. At “Stretch”, reduce both the Horizontal and Vertical, e.g. to 60% (if you ever want to print it, the printout will be smaller as well), or*
- *Use a different Image Editor other than Windows Paint. If you have a different Image Editor, you can set up Vision to use that Image Editor instead, by going to Maintenance - Consultation Setup to enter in “Program to use for editing Images” (right-click for the Path/Browse list).*

Clinical Photographs

If your camera photos are in JPEG format, you can store them in Vision against the patient under the “Images” button. By default, Vision uses Windows Paint. If you want to use a different Image Viewer, go to Maintenance - Consultation Setup and enter in “Program to use for editing Images” (right-click for the Path/Browse list).

Requirement:

- A lot of free hard disk space.
- A backup system that can handle large volume

Procedure (for Windows Paint):

1. In Vision, open the patient, and click onto the Image button at the top Toolbar.
2. Click onto New Image.
3. Highlight “Photo.jpg” and then click onto Select
4. Type in the Drawing Description. This will automatically open a blank JPEG file for the patient.
5. In the patient’s blank JPEG file, click onto “Edit” at the top menu and then “Paste From”. Select
 - Files of Type: JPEG file
 - Look in: the location where your image or photo is
6. Then double-click onto the file for your image or photo
(If you use a different Image Viewer, you may need to Copy & Paste instead, depending on your Image Viewer)
7. If it says the image is larger, just click Yes to enlarge
8. Save the JPEG file and then exit out of Paint or the Image Viewer.

Image Importer

Alternatively, if you have purchased the Vision Image Importer, you can import the scanned image via Image Importer.

Drawing

Extra Templates

Extra drawing templates can be created in Paint, other drawing softwares or pictures from cameras. All you need to do is to put the file in the folder
\\V2K\DOCUMENTS\DRAWING_TEMPLATES

JPEG

JPEG files are about 5-10% the size of BITMAP files of the same picture, and so, it is better to use JPEG. In other words, the template file should be in JPEG format. If your standard Vision drawing template files are BITMAP, you can change to the JPEG ones by:

1. Starting Windows Explorer
2. In the \\V2K\DOCUMENTS\DRAWING_TEMPLATES folder, delete all the standard Vision drawing BITMAP templates (.bmp)
3. Go to \\V2K\DOCUMENTS\DRAWING_TEMPLATES\JPG folder, copy all the JPEG files (.jpg) and paste them into
\\V2K\DOCUMENTS\DRAWING_TEMPLATES

Chapter Twelve

Recall

Recall Summary

The Recall Summary is a log of all the Recall Lists created, showing whether they were printed or not. On the Patient Menu, just click onto the "Recall Summary" option with the mouse.

A Recall Summary list will be displayed, with the following headings:

From Date	The start date of the recall period created (inclusive).
To Date	The end date of the recall period created (inclusive).
Mths Excl	The number of months excluded.
Created	The date the Recall List is created.
Date Printed	The date the recalls are printed.
Selected	The number of patients selected in the Recall List.
No Printed	The number of recalls printed.
No Hold	The number of letters put on hold.
No Phoned	The number of patients phoned.

To exit from the Recall Summary back to the Main Menu, either click on the Close button with the mouse, or press the Escape key on the keyboard.

NOTE

Sometimes, the recalls have already finished printing in Vision, but the paper hasn't actually come out yet (which could be due to various reasons like paper jam, printer been turned off, errors in the Print Queue in Microsoft Windows causing recalls not to print, etc). As far as Vision is concerned, those recalls have already been printed, and thus, will be shown in the Recall Summary as printed.

Create Recall List

This option creates a list of patients to whom recalls are to be sent. After the list is created, it is stored temporarily for checking and/or Modifying before printing. The list can also be used for phone recalling. The list stays until a new list is created (only one list is stored at one time). If a new list is created accidentally and replaces the one that you really want, to go back to the original list, you can just create another list again with the same Start date and End date as the original one.

To create a Recall List, just perform the following steps:

1. On the Patient Menu, just click onto the "Create Recall List" option with the mouse. A Create Recall List screen will be displayed, asking for the Start Date and End Date.

NOTE

When one of a patient's Recall Due Dates (First, Second, Third, Fourth or Fifth Recall Due Dates) falls within the Start Date and End Date (inclusive), the patient will be included in the Recall List.

2. Enter the start and end dates in and a Recall List will be displayed, with
at the top window - a list of patients for recalls
at the Bottom window - the details of the patient on the list whose cursor is on.
3. Use the arrow keys to move around the list for checking and Modifying (see notes on Modify Recall List). Any patient details Modified in this list will get transferred back to the original Patient Details screen of that patient.
4. When checking and Modifying is finished, press Esc to exit out of the Recall List.
5. The Recalls can be printed anytime, not necessary straight after the Recall List is created or checked (see notes on Print Recall List).

Headings on the Recall List

The Recall List displays some of the details of the patients selected for recall. There are some more headings like addresses to the right of the screen. To go to the right side of the screen, just click onto the ⇨ button with the mouse or press the → key on the keyboard. In the Recall List, some of the headings are as follows:

Printed	"Y" means the patient's recall has already been printed. "N" means the patient's recall has not been printed yet.
----------------	--

NOTE

Changing "Printed" from "Y" to "N" can get the program to reprint that recall.

Last Visit	The date of the patient's last consultation.
-------------------	--

Next Recall	The Next Recall Due Date of the patient.
--------------------	--

Next Letter	The letter type of the Next Recall.
--------------------	-------------------------------------

Last Recall The date of the last recall printed.

Normal Usage:

Under normal usage in which Recall List is created month after month, or period after period without going back to re-do a month that you have already done, no exclusion is needed.

Vision is designed such that you are allowed to re-do a month or period if necessary, in circumstances that the whole pile of recalls are damaged, e.g. someone spills a cup of coffee on them. In other words, if you repeat or overlap a month or period that you have already printed, without any exclusion, you will get the same patients on the list again and duplicate recalls will get printed.

NOTE

It is important not to repeat or overlap a month or period that you have already printed previously, (unless you enter an exclusion). Check the Recall Summary if you are not sure what date you are up to.

Exclusion:

This is the case when not all the patients are entered into Vision yet.

- If no recalls are printed until all patients are entered in, refer to Normal Usage
- If you want to start printed recalls before all the patients are entered in, use Exclusion such that the patients whose recalls have already been printed previously will get excluded.

NOTE

If you need to repeat or overlap the same period or month but do not want to reprint the ones that already been printed, make sure you enter in an exclusion.

Modify Recall List

If you just want to have a look at the last Recall List that you created, go to "Modify Recall List", not "Create Recall List". "Create Recall List" will create a brand new list again, which will replace the last one.

NOTE

Never "Create" a new Recall List until you have finished printing the existing one, and do not repeat or overlap a period.

The list created by going to "Modify recall List" will show:

- all patients whose Recall Due date fall between the Start and End Date, unless an exclusion is entered.

- "No" in the "Printed" column for all patients in the list (because this is a brand new list)

If you have only printed half of the list but mistakenly "Create" a new list instead of "Modify" the existing one, a new list will be created with patients that are similar to the first one. Because it is a brand new list and none of the patients have been printed out of this new list yet, the "Printed" column will show "No" for all the patients. If you want to continue where you were up to, you have to manually change the "No" to "Hold" in the "Printed" column for the letters that have already been printed, by checking the "Last Recall" column. If you finish one list before creating a new one and never repeat or overlap the period, then you will not need to do this manual marking.

Buttons of Recall List

The buttons on the Recall List are as follows:

Yes Printed	To change the "Printed" to "N", indicating that the recall of the patient has already been printed.
Not printed yet	To change the "Printed" to "Y", indicating that the recall of the patient has not been printed yet.
Phoned	The patient was phoned for a recall. This patient will not have a recall letter sent to them.
Hold	Do not print a recall letter for this patient.
Edit	To edit list
Print	To print letters.
Close	To exit out of the Recall List back to the Main Menu.

When a Recall List is created, all patients whose Recall Due date fall between the Start and End Date will go in the list, unless an exclusion is entered in for patients whose recall has already been printed previously.

Print Recall List

This option is to print the names of the patients on the Recall List previously created and Modified.

Print Recall Letter

This option is to print the recalls of the Recall List previously created and Modified. To print a Recall Letters, just perform the following steps:

1. On the Patient Menu, just click onto the "Print Recall Letter" option with the mouse. A Print Recall Letters screen will be displayed, displaying:
 - Number of patients selected for recalls
 - Number of Recall letters have already been printed
 - Number of recall letters to print
2. The number of recall letters to print defaults to the number of letters that have not been printed yet. Just press Enter to accept to number or overwrite it with a smaller number if you do not wish to print the whole lot all in one go. Any recalls left over can get printed next time.

NOTE

Next time when the same list is printed, the program will pick up where it has left off last time and continue printing the letters that did not get printed last time.

Re-print some of the Recalls

To reprint some of the Recalls that have already been printed before, just perform the following steps:

1. Go to Modify Recall List of the Patient Menu, by clicking onto the "Modify Recall List" option with the mouse.
1. Use the up and down arrow keys on the keyboard or click with the mouse to move the cursor to the desired patient. On the "Printed" column, change the "Y" to "N", so that the program will think this patient's recall has not been printed yet.
2. Exit out of the Recall List by pressing Esc.
3. Go to Print Recall List of the Patient pull-down sub-menu of the Main Menu, by clicking onto the "Print Recall List" option with the mouse.
5. Print the recalls that have not been printed yet (which includes the ones just modified).

Print Recall Labels

This option is for printing labels for the recall letter envelopes.

Different brands and models of labels all have different size and position and it is not easy to change the settings. Therefore, make sure the correct type of labels is purchased. Contact SUNIX if you have problem in getting them.

The default label is **Avery DL16** (2 x 8 labels per sheet, without margin).

If you want to change to one of the 2 optional ones, go to Maintenance, then Report Configuration. Click onto List to select Recall Label or Newsletter Label. Modify the Optional Report File to:

Option Report file	Brand & Model	Number of labels
VPatAdrMargin2	Avery L7162	2 x 8, with margin
vPatAdr3column2	Avery DL33	3 x 11 (old stock)
vPatAdr3column3	Avery DL33	3 x 11 (new stock)

Chapter Thirteen

Newsletters

Newsletter Summary

This option shows all the previous newsletters created and printed. On the Patient Menu, just click onto the "Newsletter Summary" option with the mouse. A Newsletter Summary list will be displayed, with the following headings:

Letter	The type of Newsletter.
No Sel.	The number of patients selected in the Newsletter List.
Printed	The date the Newsletters are printed.
No Print	The number of Newsletters out of the List which are printed.

Create Newsletter List

This option creates a list of patients to whom newsletters can be sent. After the list is created, it can be stored temporarily for checking and/or Modifying before printing. The list can also be used for exporting. The list stays until a new list is created (only one list is stored at one time). If a new list is created accidentally and replaces the one that you really want, just create another list again with the same parameters as the one you want. To create a Newsletter List, at the Patient Menu, just click onto the "Create Newsletter List" option. A Create Newsletter List screen will be displayed:

- Beginning letters can be used, e.g. putting "B" in "Spec Lens Code" will give you all patients who had Spec Lens Code that began with B.
- The "Patient History, Code & Lens Code Date" is used for:
 - Patient History
 - Patient Code
 - Spec Lens Code
 - Frame Group
 - Frame Brand
 - CL Code
 - Sphere
 - Cyl
 - Spending

- An asterisk * can be used as a wild card for the following fields:
 - Spec Lens Code
 - CL Code
 - Health Fund
- An exclamation mark ! can be put in front as an exclusion in the following fields:
 - Patient History
 - Patient Code
- Date of Birth is entered from early date to newer date, e.g. from 01/01/1990 to 31/12/2000
- By default, only patients with correct street address will come up in the list, unless you tick the box “Include Patients with Incorrect Addr”, e.g. if you are going to email.
- Conditions:
 - “And” condition
Multiple filters can be entered at the same time. For example, if you enter * in both Spec Lens Code and CL Code, only patients with both Spec Lens and CL will come up in the list
 - “Or” condition
If you want patients with either Spec Lens or CL, you create a list with the Spec Lens Code first. Then create again with CL and tick “Add to Existing List”
- “Only Include Patients with Email Address” can be used if you only want emailing but not printing at all. But if you want to email first and then print letters to the remaining one that did not get email, do NOT tick the “Only Include Patients with Email Address”. After the list is created, click Email and it would email only to the ones that have an Email address. Once emailed, those patients will be flagged Email in the list. Then you click Print, and it will print only the remaining ones that still have “No” in the first “Printed” column.
- If you want Vision to print/email the Newsletter, the “Letter Name” must be entered at the time you create the list.

Edit Newsletter List

This option is for Modifying the Newsletter List for printing or reprinting. After a Newsletter List is created, it can be stored temporarily for checking and/or Modifying before printing. The list can also be used for reprinting. The list stays until a new list is created (only one list is stored at one time). If a new list is created accidentally and replaces the one that you really want, just create another list again with the same Start date and End date as the one you want. To Modify a Newsletter List, just perform the following steps:

1. On the Patient Menu, just click onto the "Modify Newsletter List" option with the mouse .

2. Use the arrow keys to move around the list for checking and Modifying. For any patient on the list, the following can be done:
 - change "Printed" from "Y" to "N" so that the patient's newsletter will get printed again.
 - Press Enter to display a screen to Modifying the patient's details. When Modifying is finished, press F9 to save. Any patient details Modified in this list will get transferred back to the original Patient Details screen of that patient.
3. When checking and Modifying is finished, press Esc to exit out of the Newsletter List.
4. The newsletters can be printed anytime, not necessarily straight after the Newsletter List is created or checked (see notes on Print Newsletter List).

Headings on the Newsletter List

The Newsletter List displays some of the details of the patients selected for Newsletter. There are some more heading like addresses to the right of the screen. To go to the right side of the screen, just click onto the ⇨ button with the mouse or press the → key on the keyboard. In the Newsletter List, one of the headings is as follows:

Printed	"Y" means the patient's newsletter has already been printed. "N" means the patient's newsletter has not been printer yet.
----------------	--

Buttons of Newsletter List

The buttons on the Newsletter List are as follows:

Yes Printed	To change the "Printed" to "N", indicating that the recall of the patient has already been printed.
Not printed yet	To change the "Printed" to "Y", indicating that the recall of the patient has not been printed yet.
Hold	Do not print a recall letter for this patient.
Export	To export the Newsletter List to a sub-folder called EXPORT in the V2K folder of the Server.
Esc Cancel	To exit out of the Recall List back to the Main Menu.

Print Newsletter List

This option is to print the names of the patients on the Newsletter List previously created and Modified.

Print Newsletter

This option is to print the newsletters of the Newsletter List previously created and Modified. To print the newsletters, just perform the following steps:

1. On the Patient Menu, just click onto the "Print Newsletter List" option with the mouse. A Print Newsletter Letters screen will be displayed, displaying
 - Number of patients selected for newsletters
 - Number of Newsletters have already been printed
 - Number of Newsletters to print
2. The number of newsletters to print defaults to the number of letters that have not been printed yet. Just press Enter to accept to number or overwrite it with a smaller number if you do not wish to print the whole lot all in one go. Any newsletters left over can get printed next time(s).

Re-print some of the Newsletters

To reprint some of the Newsletters that have already been printed before, just perform the following steps:

1. Go to Modify Newsletter List of the Patient Menu, by clicking onto the "Modify Newsletter List" option with the mouse.
2. Use the up and down arrow keys on the keyboard or click with the mouse to move the cursor to the desired patient. On the "Printed" column, change the "Y" to "N", so that the program will think this patient's newsletter has not been printed yet.
3. Exit out of the Newsletter List by pressing Esc.
4. Go to Print Newsletter List of the Patient pull-down sub-menu of the Main Menu, by clicking onto the "Print Newsletter List" option with the mouse.
5. Print the newsletters that have not been printed yet (which includes the ones just modified).

Print Newsletter Labels

This option is for printing labels for the newsletter envelopes.

Different brands and models of labels all have different size and position and it is not easy to change the settings. Therefore, make sure the correct type of labels is purchased. Contact SUNIX if you have problem in getting them.

The default label is **Avery DL16** (2 x 8 labels per sheet, without margin).

If you want to change to one of the 2 optional ones, go to Maintenance, then Report Configuration. Click onto List to select Recall Label or Newsletter Label. Modify the Optional Report File to:

Option Report file	Brand & Model	Number of labels
VPatAdrMargin2	Avery L7162	2 x 8, with margin
vPatAdr3column2	Avery DL33	3 x 11 (old stock)
vPatAdr3column3	Avery DL33	3 x 11 (new stock)

Chapter Fourteen

Others

Barcoding Usage

- When entering a Spec record, your cursor can be in any field to scan the Frame and Lens barcode and it will automatically put the frame code in the Frame box and Lenscode in the lens box.
- From any screen, scanning the barcode on printouts for:
 - Spec Record or Lens Order will automatically open up that patient's Spec record
 - CL Order will automatically open up that patient's CL Order
 - Invoice will automatically open up that patient's Billing record
 - Patient record card will automatically open up that Patient's Detail screen
- From anywhere in the Spec screen, scanning the barcode of the supplier's invoice for lenses will put the invoice number in the Cost screen automatically.
- Scanning a frame barcode:
 - while entering a Spec record will enter the frame in the Spectacle record
 - in the Patient's Billing screen during "modifying/typing" mode, will automatically enter that frame/sunglasses as a Sundry item (this is how you would enter a sunglasses sale for a "patient", By=PS).
 - in the Cash Sale screen will automatically create a new Cash Sale record for the sale of that frame/sunglasses (this is how you would enter a sunglasses sale if you do not wish to record the purchaser's details)
 - in any other screen will bring up the frame detail screen of that frame
- Scanning the Sundry barcode:
 - in the Sundry Detail screen will bring up that Sundry item (displaying the last record from before).
 - in the Patient's Billing screen during "modifying/typing" mode, will automatically enter the sale of that sundry item in that patient's bill.
 - in the Cash Sale screen will automatically create a new Cash Sale record for the sale of that sundry item (you do not need to click onto New to create a new record).
 - in any other screen will bring up the Cash Sale screen. (Scanning it the second time will create a new Cash Sale record for the sale of that sundry item.)
- Under Inventory, you can scan frame for Stocktake.

Email

In Vision, there are the following email functions:

Patient

At the Patient Details screen, click onto the “Eml” button, which will start your default Email program (e.g. Outlook) with the patient’s email address already in.

CL Order to Supplier

At the patient’s CL Order screen, click onto “Consult” at the top menu, then click “Email Contact Lens Order to Supplier”

Spectacle Order to Supplier

- For Lens ordering, at the patient’s Spec screen, click onto “Email” button near the bottom right corner, then click the first button “Email Lens Order”.
- For Frame ordering, at the patient’s Spec screen, click onto “Email” button:
 - a. For manual frame ordering, then click the second or third button “Email Frame Order”. The second button specifies the frame to be sent to the practice, whereas the third button specifies the frame to be sent to the lab.
 - b. For automatic frame ordering at the same time the lens order is emailed, then click the first “Email Lens Order (+Frame)” button. This only applies to frames that are flagged with Display Stock status to be AE or DE. AE is for the frame to be sent to the practice, whereas DE is for the frame to be sent to the lab.

Spectacle /CL Ready to Patient

- At the patient’s Spec or CL Order screen, click the “Eml” button near the bottom
- Alternatively, under Dispensing, Spectacle or CL Ready, highlight a patient and click “Email”

Newsletter

1. In Vision, under Patient, Create Newsletter List. Type in the criteria you want.
(You have an option of creating a list of only patients with Email address, and an option to include patients with incorrect street addresses because they may have Email addresses.)
2. At “Letter Name”, press F5 or right-mouse click for the Pick List to select the newsletter that you set up previously, and click OK.
(If you are going to use a HTML file created from other program instead, you do not need to enter a Newsletter Name when creating the list).
3. From the Newsletter List, click onto the “Email” button. The program will try to send to only patients that have an email address.
4. In the “Send Email” screen, enter the Email Heading Message
 - *(Optional) if you want to email with an attachment, you need to enter the name and location of the attachment by right-mouse clicking for the list.*

- *(Optional) if want to use a HTML file created from other program instead, you need to enter the HTML file name and location by right-mouse clicking for the list.*
5. Then click send Email. When finished, the patients whose email was sent will be marked with “Email” under the “Printed” column.

Recall

1. Under Patient, Create Recall List as usual.
2. From the Recall List, click onto the “Email” button and follow the step 3 - 5 as above

SMS

In Vision, there are the following SMS functions:

Patient

At the Patient detail screen, you can send SMS by clicking onto the SMS button. Type in the message and then click “Send SMS Now” or “Send SMS & Save”. “Send SMS & Save” will send the SMS as well as save under “Letter”.

Appointment

At the Appointment screen, highlight the appointment you want to send SMS and click onto the SMS button. Change the message if needed and then click “Send SMS Now”.

Contact Lens Ready

At the Contact Lens Ready screen under Dispensing, highlight the patient you want to send SMS and click onto the SMS button. Change the message if needed and then click “Send SMS Now”. Alternatively, you can send SMS from the Patient’s Contact Lens Order screen.

Spectacle Ready

At the Spectacle Ready screen under Dispensing, highlight the patient you want to send SMS and click onto the SMS button. Change the message if needed and then click “Send SMS Now”. Alternatively, you can send SMS from the Patient’s Spectacle Details screen.

Recall

At the Edit Recall List under Patient, highlight the patient you want to send SMS and click onto the SMS button. Change the message if needed and then click “Send SMS Now”.

Statistics

The Statistics Menu allows you to run reports on the practice sales and purchases of stock. Some of the statistics report are:

Frame - Detail Usage Report

The Frame - Detail Usage Report shows the difference between the purchase price for frames and the sale price for frames. For each brand and model of frame, it calculates the gross margin and at the end of the report the Gross Profit and the Gross Margin overall are calculated.

The **Gross Profit** is shown as a percentage and is calculated by dividing the profit by the purchase price paid by the patient.

The **Gross Margin** is shown as a percentage and is calculated by dividing the profit by the cost of the frames paid by the practice.

Enter the start and end dates for the period of time you wish to report on. You can then choose to report by other categories if you wish. The other categories you can run the Frame - Detail Usage Report on are:

- Supplier Code
- Brand
- Frame Group
- Frame Status
- Location

To select any of the choices within these categories, press F5 and the pick list associated with the category will become available.

The report can be sorted by either:

Quantity	Number sold, descending.
Brand and Model	Sorted alphabetically by brand and then alphabetically by model.

Frame - Summary Usage Report

The Frame – Summary Usage Report shows the break down of frames in the practice during a nominated period of time.

The report is shown according to Frame Type and is broken down into price brackets as determined by what is entered into Price Range by for Summary Reports on the Frame Menu.

To run this report, enter the start and end dates for the period of time you wish to report on. You can then choose to report by other categories if you wish. The other categories you can run the Frame – Summary Usage Report on are:

Supplier Code
Brand
Frame Group
Frame Status
Location

To select any of the choices within these categories, press F5 and the pick list associated with the category will become available.

Frame - Summary Stock Report

This report summarises the frame stock according to frame type. It shows the breakdown of the numbers of frames being sold between the following categories of prices:

<= \$100
\$100-150
\$150-200
\$200-250
\$250-300
>\$300

The report can be run using any combination of the following categories:

Supplier Code
Brand
Frame Type
Frame Group
Frame Status
Location

To select any or all of these categories, press F5 and the picklist of options available for that category will appear. If a category is left blank, all possible options within the category will be displayed. To see all the stock, leave all the categories blank.

Frame - Aging Report

This report gives a history of frame purchases and the last sale of each frame for a given time period.

Enter the start and end dates for the period of time you wish to report on. You can then choose to report by other categories if you wish. The other categories you can run the Frame- Aging Report on are:

Supplier Code
Brand
Frame Type
Frame Group
Frame Status
Location

To select any of the choices within these categories, press F5 and the pick list associated with the category will become available.

The report shows the date of the **last purchase** of the frame by the practice, the date the **last sale** of the frame occurred, the **quantity** of each frame sold within that nominated time period, the **average cost price** and the **RRP**.

At the bottom of the report the totals for **Quantity**, **Average Cost Price** and **RRP** are shown.

Spectacle - Frame Report by Prescriber

The Frame Report by Prescriber shows how many spectacles have been purchased at the practice according to which Optometrists have prescribed them. For each of the Optometrists, the report shows the following:

Total Number of Patients

The number of patients the optometrist saw in the period of time.

Total Number of Spectacles

The number of spectacle jobs were done at the practice.

Number of Own Frames

The number of jobs where the patient supplied their own frames.

Number of new Frames

The number of jobs where the patient purchased a frame from the practice.

Total Price of the New Frames \$

The cost to the patients of the frames purchased at the practice.

Average price per Frame \$

The average price paid by the patients for their frames.

Spectacle - Frame Report by Dispenser

The Frame Report by Dispenser shows how many spectacles jobs each Dispenser has done. For each of the Dispensers, the report shows the following:

Total Number of Spectacles

The number of spectacle jobs were done at the practice.

Number of Own Frames

The number of jobs where the patient supplied their own frames.

Number of new Frames

The number of jobs where the patient purchased a frame from the practice.

Total Price of the New Frames \$

The cost to the patients of the frames purchased at the practice.

Average price per Frame \$

The average price paid by the patients for their frames.

Spectacle - Lens Type Summary

The Lens Type Summary shows the statistics for the lenses sold by the practice during the nominated period of time. The report divides the lenses into the categories of Stock and Grind and then shows the totals for all lenses at the end of the report.

The report contains the following information:

Lens Code The lens code in Vision for the lens.

No of Lens (Half-pair)

The number of **pairs** of lenses sold during this period.

Sale Price \$ The price paid (in total) for the specified lens code.

Cost \$ The cost to the practice (in total) for the specified lens code.

Profit \$ The profit made by the practice.

No of Tinting The number of lenses of which were tinted.

No of Coating The number of lenses of which were given a coating.

No of Harden The number of lenses of which were hardened.

Spectacle - Lens Type Report by Prescriber

The Lens Type Report by Prescriber shows the statistics for the lenses sold by the practice during the nominated period of time. The report is grouped by Optometrist. For each Optometrist, the report divides the lenses into the categories of Stock and Grind and then shows the totals for all lenses at the end of the report.

The report contains the following information:

Lens Code The lens code in Vision for the lens.

No of Lens (Half-pair)

The number of **pairs** of lenses sold during this period.

Sale Price \$ The price paid (in total) for the specified lens code.

Cost \$ The cost to the practice (in total) for the specified lens code.

Profit \$	The profit made by the practice.
No of Tinting	The number of lenses of which were tinted.
No of Coating	The number of lenses of which were given a coating.
No of Harden	The number of lenses of which were hardened.

Spectacle - Lens Type Report by Dispenser

The Lens Type Report by Dispenser shows the statistics for the lenses sold by the practice during the nominated period of time. The report is grouped by Dispensers. For each Dispenser, the report divides the lenses into the categories of Stock and Grind and then shows the totals for all lenses at the end of the report.

The report contains the following information:

Lens Code	The lens code in Vision for the lens.
No of Lens (Half-pair)	The number of pairs of lenses sold during this period.
Sale Price \$	The price paid (in total) for the specified lens code.
Cost \$	The cost to the practice (in total) for the specified lens code.
Profit \$	The profit made by the practice.
No of Tinting	The number of lenses of which were tinted.
No of Coating	The number of lenses of which were given a coating.
No of Harden	The number of lenses of which were hardened.

Spectacle Analysis by Prescriber

The Spectacle Analysis by Prescriber shows the statistics for the number of spectacles sold. The report is grouped by Optometrist. For each optometrist, it shows the following:

Total No of Patients	The number of patients who the Optometrist saw in the time period.
Patients with 1 Pair	The number of patients who purchased one pair of spectacles.
Patients with 2 Pairs	The number of patients who purchased two pairs of spectacles.

NOTE

This shows the number of patients who purchased two pairs of spectacles NOT how many spectacles they have purchased. For example if the figure in this column is 3, it means that three patients purchased six spectacles between them.

Patients with > 2 Pairs

The number of patients who purchased more than two pairs of spectacles.

Total No of Spectacles

The total number of spectacles sold by the Optometrist in the given time period.

Total Cost \$

The total cost to the practice for the spectacles.

Total Sale \$

The total amount taken by the practice for the spectacles.

The report also calculates the following parameters;

Average Cost of Spectacles

Average Sale Price of Spectacles

Average Profit of Spectacles

Patient with 1 Pair of Spectacles (as a percentage)

Patient with 2 Pairs of Spectacles (as a percentage)

Patient with > 2 Pairs of Spectacles (as a percentage)

Spectacle Analysis by Dispenser

The Spectacle Analysis by Dispenser shows the statistics for the number of spectacles sold. The report is grouped by Dispensers. For each dispenser, it shows the following:

Patients with 1 Pair

The number of patients who purchased one pair of spectacles.

Patients with 2 Pairs

The number of patients who purchased two pairs of spectacles.

NOTE

This shows the number of patients who purchased two pairs of spectacles NOT how many spectacles they have purchased. For example if the figure in this column is 3, it means that three patients purchased six spectacles between them.

Patients with > 2 Pairs

The number of patients who purchased more than two pairs of spectacles.

Total No of Spectacles

The total number of spectacles sold by the Optometrist in the given time period.

Total Cost \$

The total cost to the practice for the spectacles.

Total Sale \$

The total amount taken by the practice for the spectacles.

The report also calculates the following parameters:

Average Cost of Spectacles

Average Sale Price of Spectacles

Average Profit of Spectacles

Patient with 1 Pair of Spectacles (as a percentage)

Patient with 2 Pairs of Spectacles (as a percentage)

Patient with > 2 Pairs of Spectacles (as a percentage)

Contact Lens Detail Usage Report

The Contact Lens Detail Usage Report gives detailed figures for the contact lenses sold by the practice during the nominated period of time.

The Contact Lens Detail Usage Report has the following fields:

CL Code	The contact lens code used in Vision.
Description	The description of the contact lenses.
Quantity	The number of boxes of contact lenses sold.
Cost \$	The cost to the practice for the contact lenses.
RRP \$	The price the contact lenses were sold for.
Gross Profit	The profit as a percentage (profit divided by RRP).

Sundries (Coded Items) - Usage Report

The Sundries Usage Report reports on the Sundry Items sold in the practice during the nominated period of time. To run the report, enter the following parameters:

Start Date/End Date

The start and end dates of the time period you wish to run the report over.

Sundry Group

The group the sundry item belongs to (ie. solutions, spectacle accessories etc). Pressing F5 will show a pick list of the Sundry groups you have entered into Vision and you can select the appropriate one.

Supplier

The Sundry Supplier. Pressing F5 will show a pick list of the Suppliers you have entered into Vision and you can select the appropriate one.

NOTE

You can select parameters for all, some or none of these fields.

For each Sundry Group, the report shows the following:

- Brand
- Description
- Code
- Supplier Code
- Quantity Sold
- Cost Price without Tax
- Cost Price Including Tax
- RRP (Price the item was sold for)

At the end of the report, the total profit is shown. The gross profit and gross margin are also calculated.

Chapter Fifteen

Maintenance

This Menu option is for setting up the defaults and other parameters for Vision, as well as maintenance tasks such as Backup, Restore and Verify Billing.

Billing/Banking Details

This option is for setting or Modifying the Banking details and set-ups. On the Maintenance Menu, just click onto the "Banking Details" option with the mouse.

Fields of Banking Details screen

The fields are places where the actual data of the screens are stored. To Modify the data of any field on the screen, just click the Modify button with the mouse and then click onto the field you want to Modify.

Some of the fields of the Banking Details screen are as follows:

Account Number / Account Name / Bank Name / Branch

These details will be printed on the Banking slip.

Petty Cash deducted from Banking Total Amount

This sets whether to have the petty cash deducted straight from the Banking Amount.

If this field is set to "Y", in Banking screen:

Cash Banked = Cash - Petty Cash

Total Banked = Total Amount - Petty Cash

Modify Details on Banking Details

For Modifying the details in the Banking Details screen, just perform the following steps:

1. Select the "Banking Details" option from the Maintenance Menu by clicking the mouse on the option .

2. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
3. After Modifying is finished, press F9 to save the record.
4. To exit from this screen, just press Esc on the keyboard or click with the mouse onto the X at the top right corner of the screen.

Consultation Details

The Consultation Details screen allows you to set up default settings for the blank fields of the Spectacle Consultation screen and the Spectacle Consultation 2 screen. Settings entered into Consultation Details will automatically appear on these screens when a new record is made. The fields of the Consultation details screen are:

Spectacle Prescription Expiry Date

This is the time period, in months, taken from the date on which the prescription is given. This date will appear on spectacle prescriptions automatically as the expiry date.

Contact Lens Prescription Expiry Date

This is the time period, in months, taken from the date on which the prescription is given. This date will appear on contact lens prescriptions automatically as the expiry date.

Spectacle Consultation Heading 1/2/3/4

This is for the extra fields on the spectacle consultation screens where the patient tests are recorded. The headings placed here will automatically appear in the three blank fields on the spectacle consultation screen.

Rx Type Heading 2/3

The headings entered here appear automatically on the spectacle consultation screens in the section where the spectacle prescription is determined.

Default Parameters

This option is for Modifying the default parameters and set-ups for Recalls and Patient Details in Vision. Default data is data that Vision generates, but can be overwritten.

Fields of Default Parameters screen

The fields are places where the actual data of the screen is stored. To Modify the data of any field on the screen, just click on the Modify button with the mouse once, and then click onto the field you want to Modify.

Some of the fields of the Default Parameters screen are as follows:

Appointment Setup Details

This contains the default parameters for the Appointment screen. The times the appointments start and end must be given in 24-hour time.

For example: If the earliest opening time is 7.30am and the latest the practice closes is 8pm Thursday night.

Therefore: "Appointment Start" is 7 and "End" is 20.

Appointments can be colour-coded by:

"O" Optometrist

"T" Appointment Type

Recall Periods

These set the default date for the Next Recall Due date for patients after the Consultation Date is entered, as well as the Second, Third, Fourth and Fifth Recall Dates if the patient has not come back after previous recall(s) are sent. Thus, when Creating a Recall List for a given period, all the patients whose recalls (no matter first, second, third etc) fall within that period will show up on the Recall List , ready for printing.

First Recall Period

It sets the Next Recall Due Date in the Patient Details screen and the Consultation screens.

Next Recall Due = Consult Date + First Recall Period

e.g.

Consult Date = 11/03/2000

First Recall Period = 24 months

Next Recall Due = 11/03/2002

The default Next Recall Due Date can be accepted or overwritten by a different date. Thus, if the Next Recall Due date is in between the period for which the Recall List is created, the patient will be on that list.

Second/ Third/ Fourth/ Fifth Recall Period

If the patient does not come back after the first recall is sent, more recalls can be sent according to the Recall Period set-ups.

e.g.

Consult Date = 11/03/2001

First Recall Period = 24 months

Next Recall Due = 11/03/2003

Second Recall Period = 36 months

Second Recall Due = 11/03/2004

But if the Next Recall Due Date is overwritten to a date different to the default Next Recall Due Date, the second and

subsequent will be calculated from the modified Next Recall Due Date.

e.g.

Consult Date = 11/03/1999

First Recall Period = 24 months

Next Recall Due = 11/09/1999 (modified)

Second Recall Period = 36 months

Second Recall Due = 11/09/2000

(12 months from the Next Recall Due)

NOTE

- If the patient comes back before any recalls are sent, there will be a new Last Consult Date, and subsequently, new Next Recall Due Date. In other words, the recall will start from the First Recall Period again.
- If a subsequent Recall Period is set to be "0", no more subsequent recalls will be sent even if the patient has not come back.
- If the first recall is set for 24 months and you want a second recall to go out 12 months after the first one, the Second Recall Period should be **36** (not 12).

Default Recall Letters

The names of the recall letters that you want to set as the defaults for the Patient, Consult, Short Consult and Contact Lens screens.

Last Consult and Last Optom in Patient screen default from

This is only for users that have the Financial module but not the Consultation module. When "B" is entered, the Last Consult Date and Last Optom will get data from the Billing/Payment records instead of the Consultation Records. (The Last Consult Date and Last Optom fields are displayed on the Patient Details screen.)

Letter Head

This option allows you to set up the letter head which will appear on all the printouts from Vision (eg. receipts) if you do not use pre-printed letter heads. This option has four headers and three footers.

Setup flags

Flags to allow various optional features of Vision to be activated if necessary.

Dispensing/Frame Setup

This option is for setting up of the Spectacle and Dispensing parameters in Vision. Some of the fields of the Dispensing/Frame Setup screen are as follows:

Default Dispenser

This sets the default code for the dispenser which will be placed onto every spectacle screen. If you do not want to have a default dispenser, leave this field blank.

Spectacle Due

This sets the default value for Spectacle Due Date of the spectacle Details screen.

Lab Due

This sets the default time in days for Lab Due Date of the spectacle Details screen.

Item No for Frame

This sets the item number which will appear on the billing record whenever a frame appears on a bill.

Frame Code Generate by Vision

If 'Y', Vision will generate the frame code

If 'N', the person entering the frame has to create a frame code

Bar Code for Frame can be Modified by User

If 'Y', Vision will generate the barcode

If 'N', the person entering the frame has to create a barcode

NOTE

This is only applicable to practices with barcoding software

Frame Code can be Modified

If 'Y', the user can Modify the frame code

If 'N', the user cannot Modify the frame code

Eyetalk Import/Update

Please download and run the latest Elite Update before you run the Eyetalk Update.

1. Download the Eyetalk file from the Eyetalk website into your computer (e.g. in Local Disk C:\)
2. Then, you can either:
 - **“Import All”** which will add any Eyetalk codes that you don't have into your existing list. For your existing codes that are the same as the Eyetalk codes or linked to an Eyetalk Code, they will just get updated, not added again. To “Import All”:
 - a. go to Maintenance - “Eyetalk - Import/Update”
 - b. click onto the button “Import All Eyetalk Codes for Spectacle Lenses”

- c. If you want your Description, Note, Item No or Prices to be replaced by the Eyetalk ones, untick the first box and tick the ones you want. If you want your Prices to be replaced by the Eyetalk prices, set up the formula.
- d. then click the “Import All Eyetalk Code for Spectacle Lenses”
- e. an Open screen will come up asking where the Eyetalk file is. At Look In, click onto the location when you downloaded the Eyetalk file (e.g. Local disk C:\). Then in the big white box in the middle, double click onto the Eyetalk file
- f. When finish, it will automatically take you to the Lens Code Setup screen. All new lens codes will be added with “Include in Pick List” as “N”. If you want a lens to appear in your own favourite Pick List, just change the “Include in Pick List” to “Y” or tick the box in the list.

(If you click onto the Import All button and then decided you don't want those Eyetalk codes added in your list, you can click onto the “Delete Recently Imported Eyetalk Codes” button. This will delete any codes you imported in the 3 days.)

or

- **“Update”** which will just update the codes that are currently the same or linked to an Eyetalk code. It will not add new ones to your list. To “Update”:
 - a. go to Maintenance - “Eyetalk - Import/ Update”
 - b. click onto the button “Update Existing Spectacle Lenses from Eyetalk”
 - c. If you want your Description, Note, Item No or Prices to be replaced by the Eyetalk ones, untick the first box and tick the ones you want. If you want your Price to be replaced by the Eyetalk price, set up the formula.
 - d. then click the “Update Eyetalk Code for Spectacle Lenses”
 - e. An Open screen will come up asking where the Eyetalk file is. At Look In, click onto the location when you downloaded the Eyetalk file (e.g. Local disk C:\). Then in the big white box in the middle, double click onto the Eyetalk file
 - f. When finish, it will automatically take you to the Lens Code Setup screen.*(If your codes are the same as the Eyetalk codes, running the Eyetalk Update would automatically link your code to the Eyetalk code if they weren't previously linked before. If you use different codes to the Eyetalk codes, then your codes need to be linked to an Eyetalk code before the Eyetalk Update would work. You can link the codes by pressing F5 or right-click on “Eyetalk Code” for a pick list to select. Repeat this for every lens codes you use. To ensure the correct Eyetalk code is used, always select from the F5 Pick List, do NOT just manually type the Eyetalk code in. The linking is a one-off procedure only. Once the lens codes are properly linked, you will not need to link them again next time you update.)*
3. If you don't want all the Eyetalk Codes to be shown in your favourite list, it is better to mark “Include in Pick List” as N or untick the “Inc” box (instead of deleting the record). If you ever want to see those lenses that are marked N in the “Include in Pick List” or unticked in the “Inc” box, just click the “Show All” button which will show all the lenses.
 4. If you want to modify a Vision Code, make sure you click “Yes” when you are asked whether to update the old codes in old jobs to the new codes. That way, the

codes in your old jobbing records still corresponds to your new list. This is useful when you remake from any old job.

5. Repeat the above steps for Contact Lenses and Lens Extras.

Item No Details

This option is for storing information about Item numbers and their corresponding description, price/fee for each Billing Paid By type. You can have as many records as you want. They make up the Pick List for Item No in the Billing/Payment screen. In the Billing/Payment screen, if an account is paid by (By) patient (P), the Item No Pick List will only show the items that are paid by P. If it is paid by (By) Medicare (M), the Item No Pick List will only show the ones that are paid by M, and so on.

Fields of Item No Details screen

The fields are places where the actual data of the screens are stored. To Modify the data of any field on the screen, just click on the Modify button with the mouse once. Some of the fields of the Item No Details screen are as follows:

Paid By This stores information about the Paid By type of patient's Billing, e.g. P for Patient, M for Medicare, V for Veterans Affairs and VC for VisionCare.

Item No This stores information about the Item No or code for the Paid By type. For example, when Paid By Patient (P), "110" stands for Spectacle Frame, and "212+632" stands for a pair of Tinted Single Vision Lenses.

NOTE

The exact combination of Item Numbers for the Lens Code has to be set up in the Item No Details first. For example, for an SVPGX Lens with Item Numbers 211+641, there has to be a record in the Item No Details of 211+641, not 211/641, not 211,641 and not separate records of 211 and 641.

Description The description of an Item No will be the one that gets printed on the Invoice/Receipt under Health Fund description.

Report Grouping This is used only for the Billing Item Summary, Billing Item Report by Provider and the Practice Summary under Financial.

Add New Item No Record

For adding a new Item No record, just perform the following steps:

1. Select the "Item No Details" option from the "Maintenance" Menu.
2. From the top Toolbar, select "New" option by clicking the mouse on the "New" button.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. During adding, the function key F5 can be used to display available pick lists.
1. After entry is finished, press F9 to save the record or click the Save button.

Modify Previous Item No record

For Modifying a previous Item No record, just perform the following steps:

1. Select the required record by:
 - Using the List Option on the top Toolbar.
Click onto the Item No to Modify with the mouse; or use the ↑↓ keys to move the cursor to the Item No to Modify, then click on Select.
 - Using the "Prev" or "Next" option on the top Toolbar
2. Click on the Modify button with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the function key F5 can be used to display available pick lists.
6. After Modifying is finished, press F9 to save the record or click the Save button.

Lens Code Setup - Spectacle

This option is for storing information about Lens codes and their corresponding Item numbers and prices etc. (Its list is just like the price list of lenses.) You can have as many records as you want.

Fields of Lens Code & Item No screen

The fields are places where the actual data of the screens are stored. To Modify the data of any field on the screen, just click on the Modify button with the mouse once, and then click onto the field you want to Modify.

Some of the fields of the Lens Code screen are as follows:

Lens Code This is a code assigned to each lens type and material, e.g SVCR, SVWG.

NOTE

All codes have to be unique. If different size lens are charged at different prices, each size should be given a different Lens Code, e.g. SVCR65, SVCR70.

NOTE

Lens codes cannot have the symbols &, * or # in them because when you print the barcodes for the lens codes, a barcode will not be produced when these symbols are in the lens code.

Stock/Grind This indicates whether the lens is a stock (S) or grind (G) lens.

Note This stores the notes of the Lens Code for internal use, e.g the stock range (6/2, 4/2 etc).

Seg Size / Lens Size

This stores the Seg Size and Lens Size of the Lens.

Supplier This field stores the code of the supplier of the stock. When a new stock is entered, the Supplier will default to the Supplier of the last record. Press Enter to accept the default Supplier or overwrite it with a new one . F5 can also be used to display a Pick List for picking.

Cost Price This stores the cost price or average cost price of lenses of that Lens Code.

Health Fund Item No - 1 Lens / 2 Lens

This stores the Health Fund Item Numbers if one lens is sold and if two lenses are sold. F5 can be used to display a Pick List of Item Numbers for picking. The Pick List of Item Numbers can be set under Item No Details (Paid By P - Patient).

NOTE

The exact combination of Item Numbers for the Lens Code has to be set up in the Item No Details (see notes on Item No Details of Maintenance). For example, for an SVPGX Lens with Item Numbers 211+641, there has to be a record in the Item No Details of 211+641, not 211/641, not 211,641 and not separate records of 211 and 641.

Add New Lens Code & Item No record

For adding a Lens Code record, just perform the following steps:

1. Select the "Lens Code & Item No" option from the Maintenance Menu. The Lens Code screen will be displayed with the screen Title at the top.
2. From the top Toolbar, select the "New" button by clicking the mouse on it.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. When adding a new record, the F5 function key can be used to select the Supplier and whether the lens is stock or grind.
6. After the entry is finished, press F9 to save the record or click on the Save button.

Modify Previous Lens Code & Item No record

For Modifying a Lens Code record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Toolbar. Click onto the Modify option with the mouse; or use the ↑↓ keys to move the cursor to Select and press Enter.
 - Using the "Prev" or "Next" option on the top ToolBar.
2. Click the Modify button with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. After Modifying is finished, press F9 to save the record or click on the Save button.

Lens Code Setup - Contact Lens

This option is for storing information about Contact Lens codes and their corresponding Item numbers, prices and other details. You can have as many records as you want.

Fields of Lens Code & Item No screen

The fields are places where the actual data of the screen is stored. To edit the data of any field on the screen, just click on the Modify button with the mouse once, and then click onto the field you want to edit.

Some of the fields of the Contact Lens Code & Item No screen are as follows:

Contact Lens Code

This is a code assigned to each contact lens type.

NOTE

All codes have to be unique. There has to be one code for every type of contact lens stored in Vision.

Stock Control in Sundry

A “Y” for Yes in this field indicates to Vision that contact lenses can be sold as sundry items.

Supplier

The code for the company who supplies the practice with the contact lenses. When entering or modifying a contact lens record, pressing F5 will bring up a pick list of suppliers.

Per Case (for 1 Eye)

The cost for one eye if the contact is to be sold on a per case basis.

Per Lens (for 1 Eye)

The cost for one eye if the contact is to be sold on a per lens basis.

Contact Lens Item No

The item number used by private health funds when patients claim for the cost of their contact lenses. When entering or modifying a contact lens record, pressing F5 will bring up a pick list of item numbers.

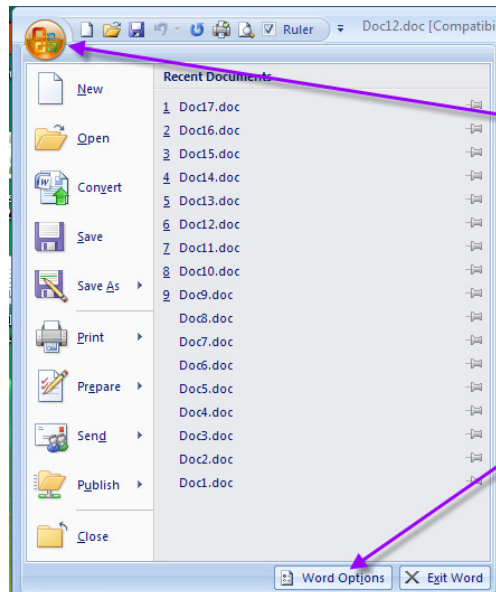
Lens Extra (Tinting, Coating & Hardening)

Displays a screen showing different options by code and is for setting up extras such as coating, hardening and tinting. This screen allows changes to be made.

Setting up Mail Merge in Letter Templates

Requirement:

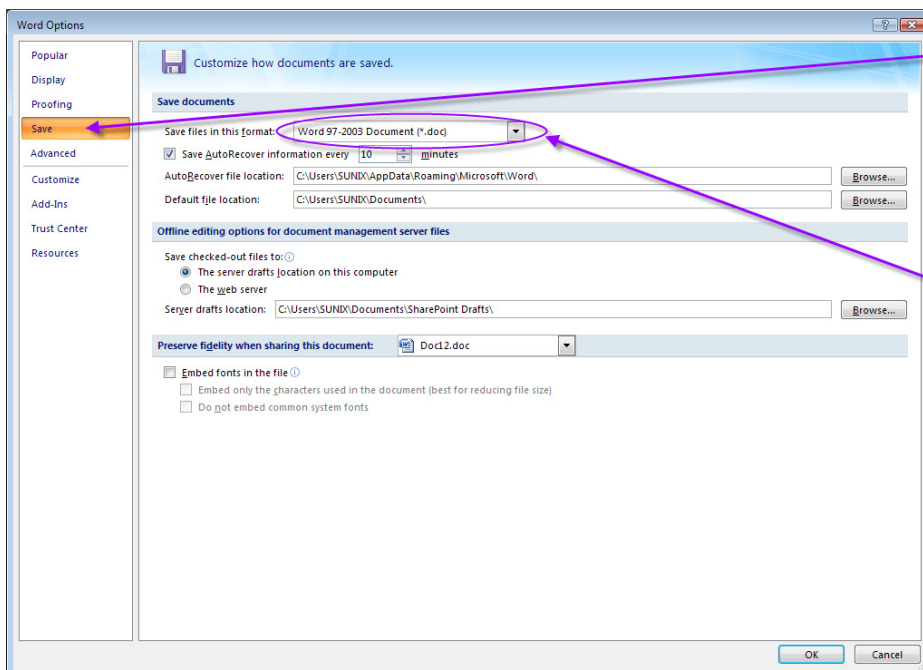
- If the Windows version is Windows XP, Vista or Windows 7, the MS-Word version has to be either 2002, 2003, 2007, 2010 or above.
- If the Word version is 2007 or 2010 and there are old documents in the old Word format (.doc) or there are other computers running old version of Word (2002 or 2003), the 2007/2010 Word must be set up to save in the 2002/2003 format.



You can do so by clicking onto the Windows flag at the top right corner of the screen.

A drop-down menu will come up.

Then near the bottom right corner of that menu, click onto the Word Options button.



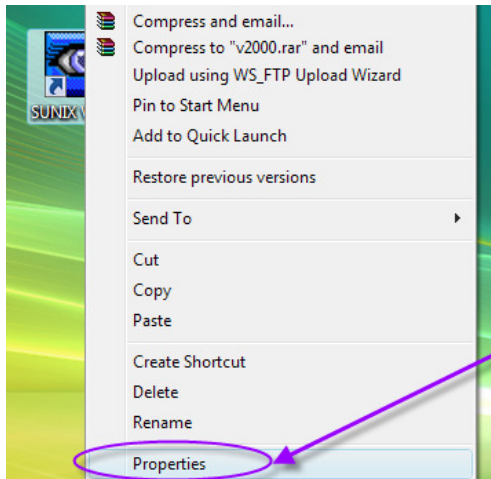
At the left of the Word Options screen, click onto "Save"

At "Save files in this format", click onto the down arrow to change to "Word 97-2003 Document (*.doc)"

Trouble-shooting:

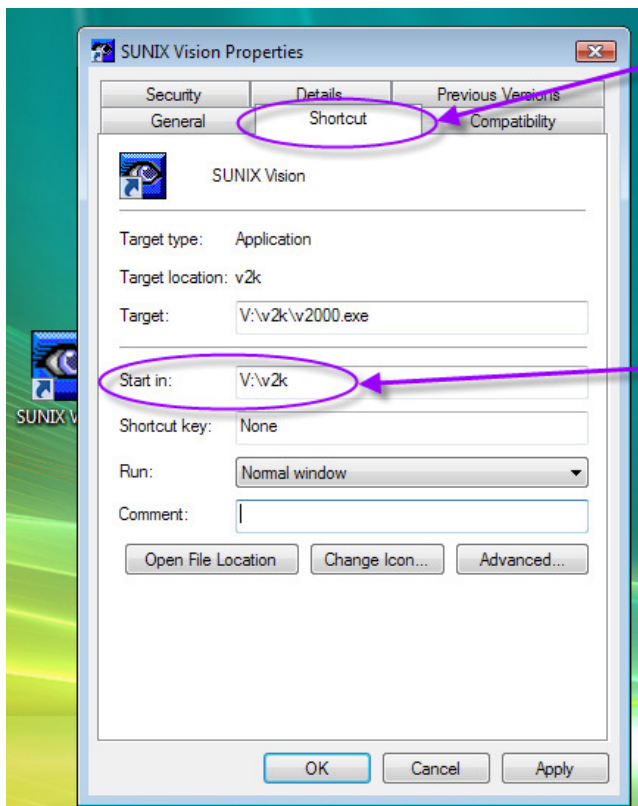
1. In Vision, go to Maintenance - Default Parameters, at "Word Version" near the bottom right of the screen, make sure there is "XP2".
2. Exit out of Vision.
3. Start MS-Word (make sure there is no error come up)
4. In Word, click onto Open. Then Look into the folder where your program is.

If you don't know where your SUNIX program is, right-click onto the SUNIX Vision icon.



A menu will come up.

Then left-click onto Properties.



At the Properties screen, go to the "Shortcut" tab.

The "Start in" will show you where your program is, e.g. C:\Vision\V2K or V:\V2K

5. In Word, after opening the folder where your SUNIX program is, double-click onto the sub-folder "Documents". Then

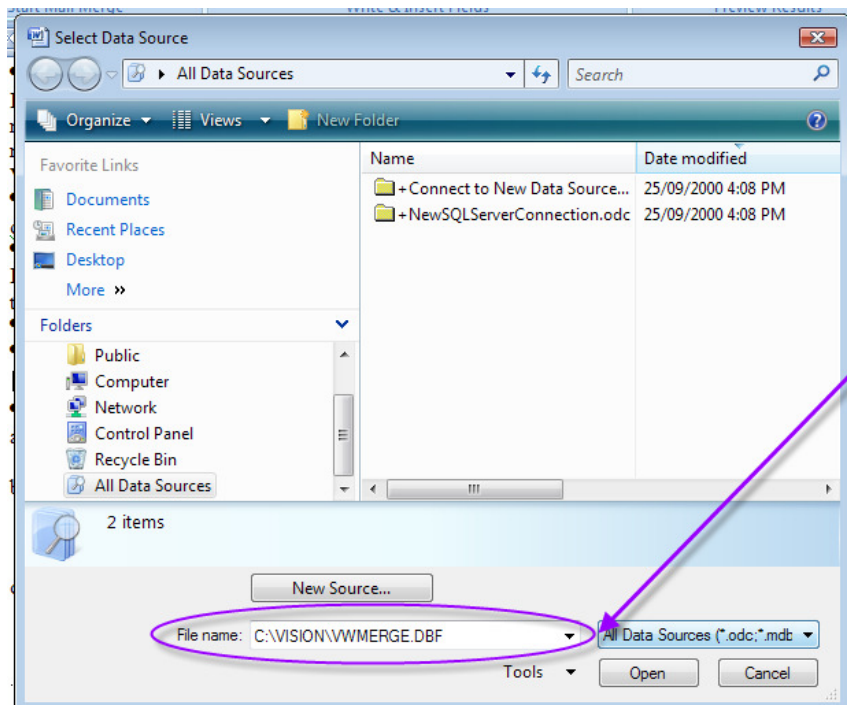
- for Recall templates, open the “Recall” sub-folder,
 - for Patient templates, open the “Patient” sub-folder,
 - for Newsletter templates, open the “Newsletter” sub-folder,
 - for Email templates, open the “Email” sub-folder
- and double-click onto the template you want.
6. If a message “Opening this document will run the following SQL command” comes up, just click Yes to continue. (This is a normal message that usually comes up when opening a Mail-Merge template)
 7. If another message comes up complaining about the Data Source, it means your Mail Merge is not set up properly. You need to “Open Data Source” and Look into the Local Disk C: (not the network drive). Then open the VISION folder and double-click onto VWMERGE.DBF or VWMERGE;

or

If no message comes up when you open the template, you should still re-do the Mail-Merge by the following steps depending on the version of Word:

For Word 2007 or 2010

- a. At the top menu, click onto “Mailings”, then “Select Recipient”, and then “Use Existing List”.
- b. In the “Select Data Source” screen, at “File name” near the bottom



type in

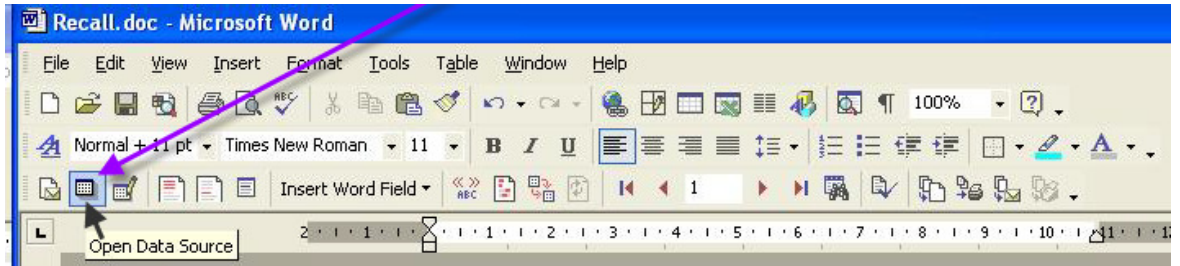
C:\VISION\VWMERGE.DBF

and press Enter.

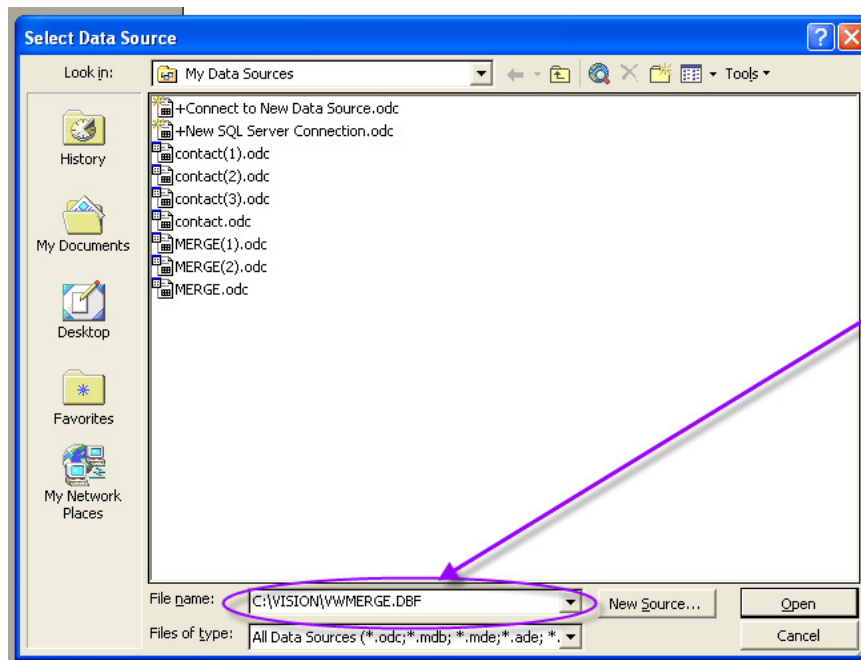
- c. To save the Mail Merge setting, you should type something in the content of the document (even just a space) before saving. Otherwise, the Mail Merge setting might not get saved.

For Word 2002, 2003

- a. At the top menu, check to see if the Mail Merge toolbar is enabled by clicking onto View, then Toolbar. There should be a tick next to Mail Merge. If there is not, click onto Mail Merge to enable it. If there is already a tick, don't click again, just press Esc to close out of the drop down menus.
- b. At the top, click onto the "Open Data Source" button



- c. A "Select Data Source" screen will come up.



At "File name", type in

C:\VISION\WWMERGE.DBF

and press Enter.

- d. To save the Mail Merge setting, you should type something in the content of the document (even just a space) before saving. Otherwise, the Mail Merge setting might not get saved.

Windows Settings

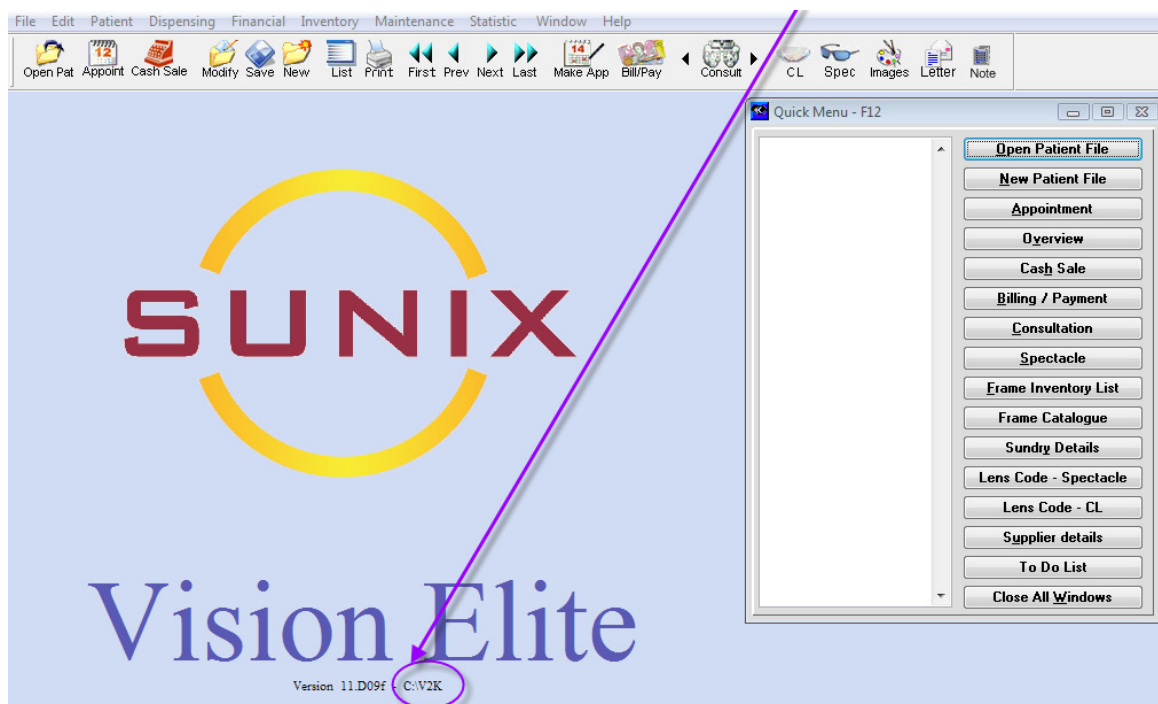
1. Exit out of Vision, go to My Computer and then Local C: drive. Make sure there is a folder called TEMP. If not, create one.

2. Go to Start - Control Panel - System – (Advanced system settings) Advanced - Environment Variables. At System variables, highlight the Variable TEMP and click Edit. Change the Variable value to C:\TEMP and click OK, OK and OK.

Editing Existing Letter Templates

1. Exit out of Vision.
2. Start MS-Word (make sure there is no error come up)
3. In Word, click onto Open, and Look into the folder where your SUNIX program is.

If you don't know where your SUNIX program is, look under the SUNIX logo:



4. In your V2K folder, double-click to open the sub-folder “Documents”. Then
 - for Recall templates, open the “Recall” sub-folder,
 - for Patient templates, open the “Patient” sub-folder,
 - for Newsletter templates, open the “Newsletter” sub-folder,
 - for Email templates, open the “Email” sub-folder
 and double-click onto the template you want.

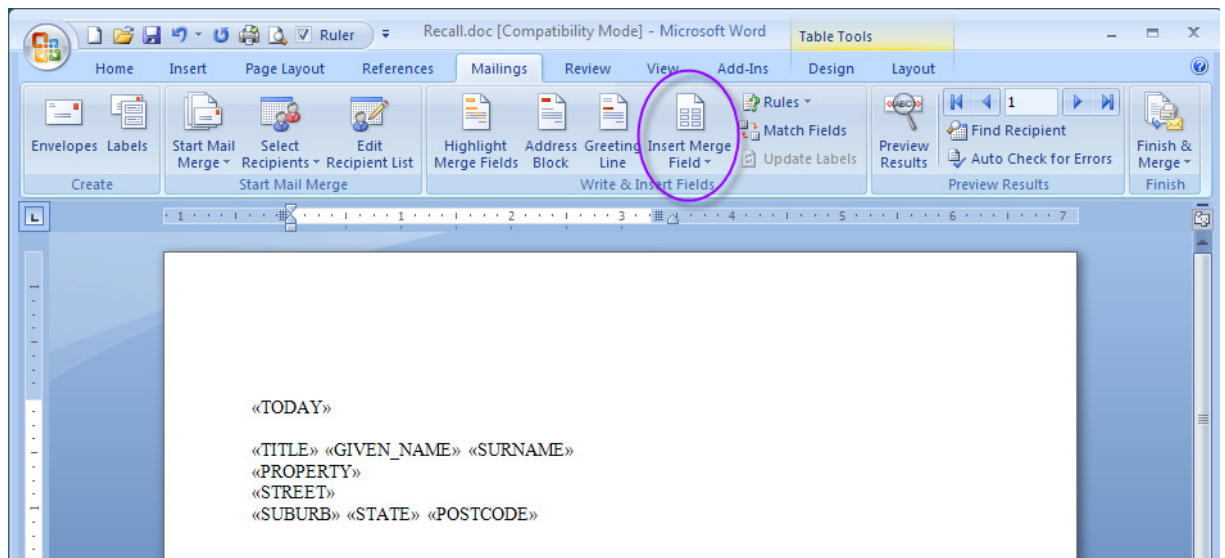
5. If a message “Opening this document will run the following SQL command” comes up, just click Yes to continue. (This is a normal message that usually comes up when opening a Mail-Merge template)
6. Edit the content or “Insert Merge Field”. Then Save.

Insert Merge Field

Merge Fields can be inserted into the Letter Template so that it will bring up details of patient, consultation, doctor etc. To insert a Merge Field, open the Letter Template and place the cursor where you want the Merge Field to be. Then,

For Word 2007 or 2010

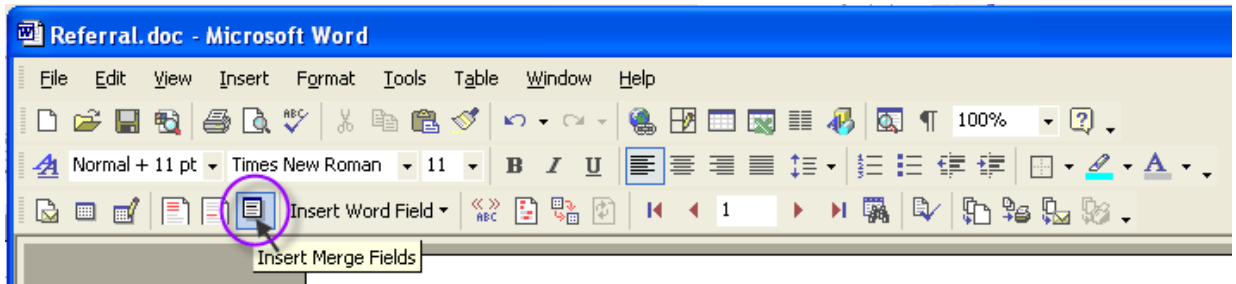
At the top menu, click onto “Mailings”, then “Insert Merge Field” to bring up the list of Merge Fields to select.



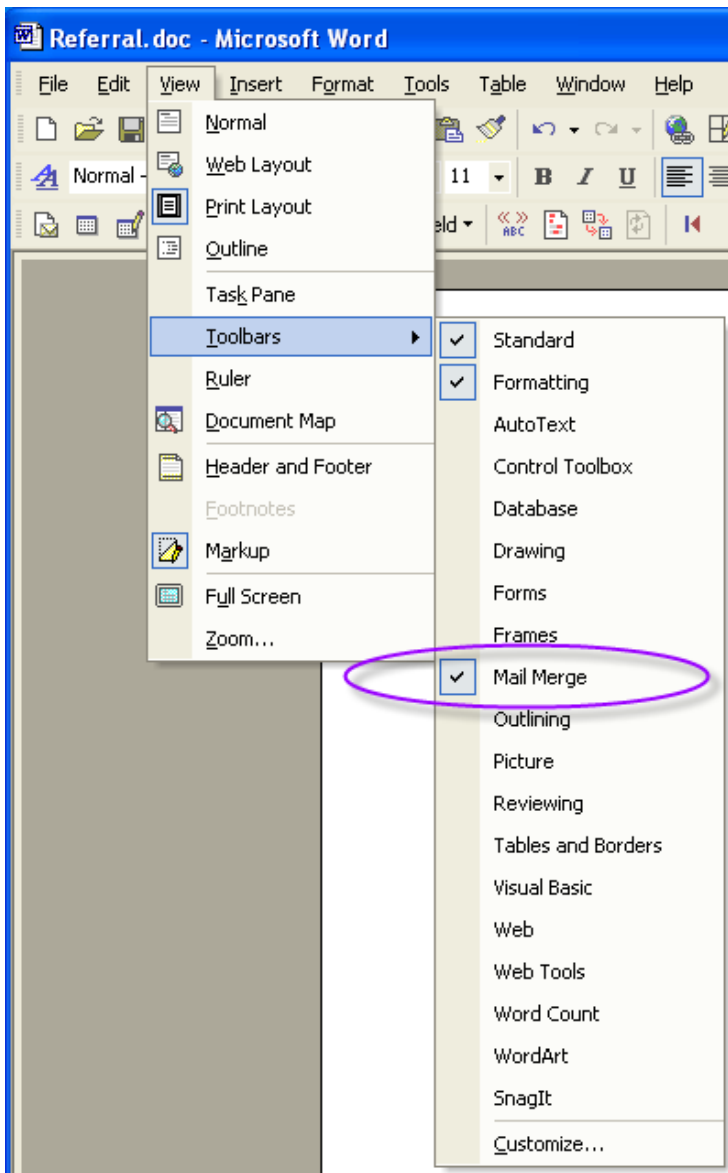
If the “Insert Merge Field” button is grey, that means your Mail Merge is not set up properly yet. Please refer to the separate instruction on how to set up Letter Mail Merge.

For Word 2002, 2003

At the top toolbar, click onto the “Insert Merge Field” button to bring up the list of Merge Fields.



If the “Insert Merge Field” button is grey, that means your Mail Merge is not set up properly yet. Please refer to the separate instruction on how to set up Letter Mail Merge.



If you cannot find the “Insert Merge Field” button at the toolbar, enable the Mail Merge toolbar by clicking onto “View” at the top menu, then Toolbar, then click onto Mail Merge. (If there is already a tick, don’t click again, just press Esc to close out of the drop down menus.)

Creating New Letter Templates

To create a new letter template, it is easier to base on an existing template than to start from scratch.

For Recall, Newsletter or Email Templates

- A. Exit out of Vision.
- B. Start MS-Word (make sure there is no error come up)
- C. In Word, click onto Open and Look into the folder where your SUNIX program is.
- D. In your V2K folder, double-click to open the sub-folder “Documents”. Then
 - for Recall templates, open the “Recall” sub-folder,
 - for Newsletter templates, open the “Newsletter” sub-folder,
 - for Email templates, open the “Email” sub-folderDouble-click to open the one you want to base on. If a message “Opening this document will run the following SQL command” comes up, just click Yes to continue. Then at the top menu, click onto File or the Windows flag and then **Save As**. Change the name to what you want, edit the content of the new template and Save.

For Patient Letter Templates

Follow the above steps A-D, to set up the templates from

- the “Patient” sub-folder of “Documents”

Then you need to set up the menu for Patient Letters:

1. In Vision, then to Maintenance, Letter Template – Patient.
2. Click onto Insert New Letter Template.
3. At Letter Description, type in a name or description for the new template (can be anything).
4. At Document Name, press F5 or right-mouse click to select from the pick list of the patient templates. The template that you previously created in MS-Word should be in the list.
5. At Pick Doctor, type Y if you want Vision to bring up a Pick List of Doctors while creating a letter for patient (e.g. Referral letter); or type N if you do not want the Pick List to come up (e.g. Thank You letter).
6. At Mail Merge, always type Y, unless you do not require it to bring up any patient information.
7. At Sort Order, type in a number which will determine what order that template is going to be at. For example, 1 will come before 2, which will come before 3 etc. However, if you have more than 10 letters, the first one should be 01, not 1, and the second one is 02 etc. If the other templates do not have a Sort Order, you

should enter one in for every template in the menu, because space will come before numbers.

8. When finished, click onto Save at the top toolbar.

Login Id & Password

The Login ID controls the level of access in various parts or functions of the program.

NOTE

Within a network, every computer must log in as a different Login Id.

Since a computer is used by many staffs, Login Id's should not be set up per staff members, instead, they should be set up per location, e.g. REC for Reception, CON for Consult, LAB for Lab etc. These general Login Id's should have no access to the Login Id and Staff Code screens and should only have low level of access to other parts of the program. Besides the general logins, there should also be one master Login for the owner or manager, which has a higher level of access and should be the only one that has access to the Login Id and Staff Code screens.

The owner or manager should be the only person that has his/her own personal Login Id. However, even though the owner or manager has a master Login, he/she should still log in with a general Id normally, such as REC. When he/she needs to perform certain high level task such as running financial management reports, he/she then changes the Login to the master one, by either exiting out of Vision, or clicking onto "File" at the top menu and then "Login with a New User Id". After the high level task has been completed, he/she should change back to the general Login.

"List" button of the top Toolbar

The "List" button of the top toolbar shows a list of different Login Id's that are set up. All Login Id's must be unique. The record of Login Id "SUN" should be deleted (it was only set up during installation). Login Id "SUN" should not be used any more, because everyone knows about "SUN".

Login Id

They should be set up per location, e.g. REC for Reception, CON for Consult, LAB for Lab etc, not per staff members. There should also be one master Login Id for the owner or manager, which has a higher level of access and should be the only one that is set up to have access to the Login Id and Staff Code screens

Password

Passwords only get displayed on this setup screen but not on the screen when logging on, for security purpose. The Passwords for general login such as REC, CON, LAB can be blank or identical to each other. However, the Password for the master login should not be blank, and it must be unique. The owner or manager can use the same password in both the Login Id and Staff Code set up screens.

Setups

You can bring up a Pick List for selection, by either pressing F5 or clicking with the right mouse button.

Login/Staff Details Setup

This controls whether the user has access to the Login Id and Staff Code setup screens.

- | | |
|---|---|
| Y | Has access to the Login Id and Staff Code setup screens. Only the master login should be set up as Y. |
| N | No access to the Login Id and Staff Code setup screens. All other general logins should be set up as N. |

Banking

This controls the level of access to the Banking screen under Financial.

- | | |
|---|--|
| N | <ul style="list-style-type: none">-No access to Banking-No access to Banking Reconciliation-Cannot delete Payment or Cash-sale records from a closed banking period-If a Payment or Cash-sale record from a closed banking period is modified, the Banking totals would still remain the same. A “Mismatch” warning message will come up when going to the Banking Transaction, indicating a record has been modified after Banking is closed. <p style="margin-left: 40px;"><i>A closed period usually means money has already been taken to the bank and so the totals should not change any more.</i></p> |
| C | <ul style="list-style-type: none">-Has access to Current Banking period only-No access to Banking Reconciliation-Cannot delete Payment or Cash-sale records from a closed banking period-If a Payment or Cash-sale record from a closed banking period is modified, the Banking totals would still remain the same. A “Mismatch” warning message will come up when going to the Banking Transaction, indicating a record has been modified after Banking is closed. <p style="margin-left: 40px;"><i>A closed period usually means money has already been taken to the bank and so the totals should not change any more.</i></p> |
| Y | <ul style="list-style-type: none">-Has access to all Banking periods-Has access to Banking Reconciliation-Cannot delete Payment or Cash-sale records from a closed banking period |

-If a Payment or Cash-sale record from a closed banking period is modified, the Banking totals would still remain the same. A “Mismatch” warning message will come up when going to the Banking Transaction, indicating a record has been modified after Banking is closed.

A closed period usually means money has already been taken to the bank and so the totals should not change any more.

- S
- Banking Supervisor
 - Has access to all Banking periods
 - Has access to Banking Reconciliation
 - Can delete Payment or Cash-sale records from a closed banking period
 - If a Payment or Cash-sale record from a closed banking period is modified or deleted, you need to go to Banking Transaction, which will re-calculate the Banking Totals. There will not be any “Mismatch” message. If there is a change in Cash amount, you will still need to manually modify the “Cash Deposit” amount.

NOTE

It is not recommended to be set up as a Banking Supervisor normally, even for the owner/manager, to prevent accidental deletion or changing of records from closed banking periods. Only change to Banking Supervisor to fix up mistakes. Once the mistake is fixed, change back to N, C or Y. Therefore, it is important to check through the banking and make any necessary changes before closing the banking, to avoid the need to log in as Banking Supervisor.

Bill/Pay/Cash Sale

This affects how the user can enter new, modify and delete existing Billing, Payment or Cash-sale records:

- D
- can enter new record only (**Date** cannot be changed)
 - cannot modify old record
 - can delete old record, but staff password is needed for deleting
- After a record is deleted, it is still visible, but with a "Deleted" status and will not show in any financial reports or banking.*
- N
- can enter **New** record only (date can be changed)
 - cannot modify old record
 - can delete old record, but staff password is needed for deleting
- After a record is deleted, it is still visible, but with a "Deleted" status and will not show in any financial reports or bankings.*
- E
- can enter new record (date can be changed)
 - can **Edit** old record
 - can delete old record, but staff password is needed for deleting

After a record is deleted, it is still visible, but with a "Deleted" status and will not show in any financial reports or bankings.

- R - can enter new record (date can be changed)
 - can modify old record
 - can delete old record, and staff password is NOT needed
*After a record is deleted, it is **Removed**.*

In other words:

If Bill/Pay/Cash-Sale is setup to be D, N or E, Staff Code & Password (not Login & Password) must be set up for each and every staff members, because they will need their Staff Password for deleting any Bill/Pay/Cash-Sale records. The deleted record will stay as audit-trail, and will show up in the Deleted Billing/Payment Report.

If Bill/Pay/Cash-Sale is setup to be R, no Staff Password is needed for deletion, and the deleted record will be removed, i.e. it will not show up in the Deleted Billing/Payment Report.

If Bill/Pay/Cash-Sale is setup to be D or N, the staff will not be able to modify a Billing, Payment or Cash-sale record once it has been saved. If the staff needs to modify the record after it has been saved, he will need to delete the record (with his Staff Password) and re-enter new one. Therefore, it is important to check the entry before saving a Billing, Payment or Cash-sale record.

NOTE

It is not recommended to set up “R” for general staffs, because it has no security, and staffs can easily modify or delete an old financial records which will also lead to discrepancy in old reports.

Financial Management Reports

This controls whether the user can run the Financial Management reports under Financial (excluding Banking, Bulk Billing, Outstanding Accounts, Petty Cash, Supplier Invoice and Expense Payment).

- Y user has access to the Financial Management reports
N user has no access to the Financial Management reports

Frame Details

This controls whether the user has access to the Frame details screen and its reports

- N -**No** access to the Frame Details screen
 -Cannot run frame reports.
C -Has access to the Frame Details screen, but without **Cost** prices
 -Cannot run frame reports.
Y -**Yes**, has access to the whole Frame Details screen
 -Cannot run frame reports.

- U -Has access to the whole Frame Details screen
 -Cannot run frame reports except the “Detail **Usage** Report with no RRP”
- R -Has access to the whole Frame Details screen
 -Can run all frame **Reports**
- S -Frame **Supervisor**
 -Has access to the whole Frame Details screen
 -Can run all frame reports
 -Can change the Old Qty, New Qty or Invoice No in the Frame History.

NOTE

If log in as a Frame Supervisor, it will take longer to bring up the Frame History screen.

Sundry Details

This controls whether the user has access to the Sundry details and reports:

- N user has no access to the Sundry details screen or reports.
- Y user has access to the Sundry details screen, but no reports.
- R user has full access to the Sundry details screen and reports.

Staff Password on Stock Adjustment

This controls whether staff password is required when stock quantity is adjusted

- N staff password is not required for Stock Adjustment
- Y staff password is required for Stock Adjustment

NOTE

If Staff Password on Stock Adjustment is set up to be Y, make sure Staff Code & Password are set up for each and every staff that may need to adjust stock quantity.

Authority To Delete Patient

This controls whether the staff can delete a Patient Detail record

- N Cannot delete Patient records
- Y Can delete Patient, by clicking onto File at the top menu and then Delete Record.

NOTE

If the patient has a Billing, Payment, Spectacle or Consultation record, you should not delete that patient record. Otherwise that Billing, Payment, Spectacle or Consultation record will have no patient to refer to. For example, the Banking will show a payment by “Unkown Patient”. Therefore, it is probably safer not to set up anyone at all to have authority to delete patient records.

The followings are some examples of Login Id's and their setups:

Login Id	<i>(master login)</i>	REC	CON
Password	<i>(must have password)</i>		
Login/Staff Details Setup	Y	N	N
Banking	Y	Y	Y
Bill / Pay / Cash-Sale	E	N	N
Financial Management Reports	Y	N	N
Other Statistics	Y	Y	Y
Frame Details	R	R	R
Sundry Details	R	R	R
Staff Password on Stock Adjustment	Y	Y	Y
Authority to Delete Patient	N	N	N

Optometrist/Doctor/Dispenser's Details

This option is for storing information about doctors', optometrists' and dispensers' details (including optometrists and dispensers in the practice, and other optometrists or doctors outside the practice). The doctors and optometrists in this option make up the Pick List for "Optom" in the Patient, Consultation and Billing/Payment screens, "GP" in the Patient screen, and "Rx by" in the Spectacle screen. You can have as many Optometrist/Doctor/Dispenser records as you want.

On the Maintenance Menu, just click onto the "Optometrist/Doctor/Dispenser's Details" option with the mouse. The Optometrist/Doctor/Dispenser's Details screen will then be displayed with the screen Title at the top.

Fields of Optometrist/Doctor/Dispenser's Details screen

The fields are places where the actual data of the screens are stored. To Modify the data of any field on the screen, just click the Modify button with the mouse once, and then click onto the field you want to Modify. Some of the fields of the Optometrist/Doctor/Dispenser's Details screen are as follows:

Code This is a code assigned to each Optometrist, Doctor or Dispenser.

NOTE

All codes have to be unique for the optometrist, doctor or dispenser.

Profession This indicates whether the person in the record is an optometrist, ophthalmologist, dispenser or general practitioner. A Pick List can be used for picking by pressing F5. The Pick List can be added or Modified through the Pick List option of the Maintenance Menu (see notes on Pick Lists).

Provider No The Provider Number of an optometrist whose code is entered in a Billing/Payment record will be printed on the Account/Receipt.

NOTE

If the optometrist has no Provider Number in the Optometrist/Doctor/Dispenser's Details screen, the default Optometrist's Provider Number will be printed on the Account/Receipt instead.

Add New Optometrist/Doctor record

For adding a Optometrist/Doctor record, just perform the following steps:

1. Select the Optometrist/Doctor/Dispenser's Details option from the Maintenance Menu by clicking the mouse on the mouse.. The Optometrist/Doctor screen will be displayed.
2. From the top Toolbar of the screen, select the "New" option by clicking the mouse on the option.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. During adding the F5 function key can be used to display pick lists of choices.
6. After entry is finished, press F9 to save the record.
7. To exit from this screen, just click onto the "X" on the top right corner of the screen or press Esc on the keyboard.

Modify Previous Optometrist/Doctor record

For Modifying a previous Optometrist/Doctor/Dispenser record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Toolbar.
Click onto the List option with the mouse and use the ↑↓ keys to move the cursor to the desired record and press Enter.
 - Using the "Prev" or "Next" option on the top ToolBar
2. Click anywhere on the screen with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.

4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. During Modifying, the F5 function key can be used to display pick lists.
6. After Modifying is finished, press F9 to save the record.
7. To exit from this screen, just click onto the “X” at the top right corner of the screen or press Esc on the keyboard.

Patient Code

This Pick List is for the “Code” button in the Patient and Consultation screens.

Patient History

This Pick List is for the “History” button in the Patient and Consultation screen.

Pick List

This option is for setting up different types of Pick Lists. On every Pick List, you can insert as many records as you want. On the Maintenance Menu, just click onto the "Pick Lists" option with the mouse and then press Enter and then use the arrow keys to select “Pick List”. A list of Pick Lists will be displayed. They are as follows:

Account Code This Pick List is for the Account field in the Patient Details screen. The Account field indicates the account or credit rating of the patient.

Appointment Type This Pick List is for the "Type" field in the Appointment screen. It can also set the colour of each Appointment Type if the Appointment is setup to be colour-coded by Appointment Type under Default Parameters.

Biomicroscopy Code This Pick List is for the "Biomicro" fields in the Spectacle Consultation screen.

CL Collect/Return This Pick List is for the “Collect” field on the Contact Lens Order screen.

Cleaning System This Pick List is for the "Cleaning Sys" fields in the Contact Lens Order screen.

Consultation Heading

This Pick List is for the three optional headings in the Spectacle Consultation screen.

Consultation Type

This Pick List is for the "Consult Item" fields in the Consultation screens (Spectacle, Short and Contact Lens Consultation screens), and for the Consultation Report in Statistics.

External Reference

This Pick List is for the External Reference button in the Patient Details screen.

Frame Group

This Pick List is for the Group field in the frame Details screen and in the Frame Reports.

Frame Location

This Pick List is for Frame Location which is the field called Location on the Frame Details screen.

Frame Type

This Pick List is for the Frame Summary Stock Report and the Frame Summary Usage Report. Default Fitting Fees can also be set up for the Spectacle screen.

Health Fund

This Pick List is for the "Health Fund" field in the Patient Details screen.

Lens Coating

This Pick List is for the "Coating" field in the Spectacle Details screen.

Lens Code Grouping

This Pick List is for the "Price List Grouping" field in the Lens Code & Item No screen. The Price List grouping is only used for printing out lens price list.

Lens Fitting/Edgeing

This Pick List is for the "Lab to Fit" field of the Spectacle screen.

Lens Hardening

This Pick List is for the "Hardening" field in the Spectacle Details screen.

Lens Tinting

This Pick List is for the "Tinting" field in the Spectacle Details screen.

Location – Stock This Pick List is for the "Location" field in the Frame and Sundry Details screens.

Occupation This Pick List is for the "Occupation" field in the patient details screen.

Opening Cashdrawer

This Pick List is to enter the reason for opening the cashdrawer when it is opened for reasons other than Billing/Payment transactions.

Ophthalmoscopy Code

This Pick List is for the "Ophthal" fields in the Spectacle Consultation screen.

Patient Code This Pick List is for the "Code" button in the Patient and Consultation screens.

Patient History This Pick List is for the "History" button in the Patient and Consultation screens.

Petty Cash Code This Pick List is used for the Petty Cash Code used when making a Petty cash entry.

Profession This Pick List is for the "Profession" field in the Optometrist/Doctor's Details screen.

Pupil Code This Pick List is for the "Pupil" fields of the Spectacle Consultation screen.

Recall Code This Pick List is for the "Recall" field in the Patient Details screen.

Report Grouping This Pick List is for the "Report Grouping" field in the Item No Details screen. The Report Grouping is only used in the Billing Item Summary, Billing Item Report by Provider and the Practice Summary under Financial.

Rx Type This Pick List is for the Prescription Type fields in the Spectacle and Short Consultation screens.

Spectacle – Reason for Discount

This Pick List is for the "Reason" field, just under "Discount" on the Spectacle screen.

Spectacle Usage This Pick List is for the "Use" field on the spectacle screen.

Stock Adjustment This Pick List is for the "Reason for Adjustment" field on the Adjustment screen. To find the Adjustment screen, go to Inventory, then Frame Details. Next go to the Frame menu and select Adjust.

Sundry Grouping	This Pick List is for the "Sundry Group" field on the Sundry details screen.
Symptom Code	This Pick List is for the "Symptom" fields in the Spectacle Consultation screen.
To Do List	This Pick List is for the "To Do" section of the Patient details screen.

Modify a Record on a Pick List

To Modify an existing record on a certain Pick List, just perform the following steps:

1. On the Maintenance Menu, just click onto the "Pick Lists" option with the mouse and then press Enter. A list of Pick Lists will be displayed.
2. From the list of Pick Lists, go to the required one by:
 - clicking the mouse on the option ,
 - using the scroll bars to move the cursor to the required item on the list and then press Select. The required Pick List will be displayed.
3. On the list, just use the scroll bars to move the cursor to the desired record and then press Modify.
4. After Modifying is finished, press F9 to save the record. This will take you back to the Pick List.
5. To exit from this list back to the previous list of Pick List, just press Cancel.

Insert a new Record on a Pick List

To insert a new record on a certain Pick List, just perform the following steps:

1. On the Maintenance Menu, just click onto the "Pick Lists" option with the mouse and then press Enter. A list of Pick Lists will be displayed.
2. From the list of Pick Lists, go to the required one by:
 - clicking the mouse on the option ,
 - using the scroll bars to move the cursor to the required item on the list and then press Select. The required Pick List will be displayed.
3. On the Pick List, press the New button. An entry screen will be displayed.
4. After the entry is finished, press F9 to save the record. This will take you back to the Pick List.

5. To exit from this list back to the previous list of Pick List, just press the Cancel button.

Report Setup

Printer & Paper Setup

1. In Vision, go to Maintenance and then Report Setup. Click onto List at the top Toolbar and Select the report you want to customise. If you are not sure which report it is, just do that printing first (either to screen or to printer), then go straight to the Report Setup, it will automatically take you to the report you just printed.
2. Click onto the “Printer & Paper Setup” button in the middle of the screen. A Printer screen will come up where you can change the printer, and click OK. Then a Page Setup screen will come up where you can set up the paper tray etc.
3. If you want to set up the report to go to the default printer instead, click the “Clear Printer & Paper Setup” button.

Modify Report Layout

(Important: *While you are modifying any report, make sure that no one prints or uses that particular report. Therefore, it is best to customise reports after work.*)

1. In Vision, go to Maintenance and then Report Setup. Click onto List at the top Toolbar and Select the report you want to customise.
2. Click onto the “Modify Report Layout” button near the bottom of the screen, and click OK.
3. At the Report Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin (*Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page*).
4. At the Report Designer screen, you can modify the report design:
(Important: *Only **Single**-click to select a field. Do **NOT** double click to change the Expression or anything inside unless you know what you are doing, because Vision will crash if you make any mistake in the Expression.*)

To move or delete a field:

Single-click onto the field you want, and then press the arrow keys to move or delete key to delete the field.

To move the whole report down:

Click onto “Edit” at the top menu, and then “Select All”. Move everything down by pressing the ↓ on the keyboard. However, if the report consists of different sections such as Title, Page Header, Detail, Page Footer, Summary etc, you have to make sure everything stays in the original section and does not get moved to the next section. In other words, instead of “Select All” and moving everything at the same time, you have to move a bit or a group at a time.

To change the Font or size of a field:

Click onto the field you want to change. Then click onto Format at the top menu and then Font

5. If you have made customisation in the report, it is best to rename your report such that it will not get overwritten by future updates. To rename a report, at the Report Designer screen, click onto File at the top menu. Then onto “Save As” in the drop-down menu. In the big white box in the middle, double click onto Reports. The “Save in” box above should now say “Reports”. At the “Save Report” box below, type in the name you want the report to be and then click Save.

(Important: all reports have to be in the Reports folder of V2K and all names have to be unique)

6. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save.
7. If you had just renamed the report, you need to tell Vision to use the new report you created instead of the standard one. To do so, at the Report Setup screen, click Modify and type the report name you just use (without the .FRX extension) in the Optional Report File field.

Note:

- If you have set up Vision to use a report different to the Standard one (in Optional Report File), your customised report will not get overwritten by future updates. However, what that means is if SUNIX changes that report in the future, you will not get the new changes. To change back to use SUNIX’s standard report instead, all you need to do is to empty the Optional Report File, Save and then click onto Restore Report.
- If you make mistakes at any time while customising the report, you can start from scratch again, by emptying the Optional Report File (if any), Save and then click onto Restore Report. This will give you back the original report given by SUNIX.

To add or edit text in a report:

(e.g. Customising Letterhead, Outstanding Account Letter, Appointment Card)

1. Exit completely out of Vision and go back in and log in as SXR. (*If you do not have a Login Id called SXR, go to Maintenance and then Login Id & Password. Then create a **New** record with Login Id called "SXR"*)

Note: To access this "adding or editing text" feature, you must exit out of Vision and then re-start. Just change Login by clicking onto the File menu and Login with a new User Id is not good enough.

2. In Vision, go to Maintenance and then Report Setup. Click onto List and Select the report you want to customise.
3. Click onto the "Modify Report Layout" button near the bottom of the screen. In the screen with the warning message, click onto OK
4. At the Print Setup screen, check the Printer, Paper size, Tray and Orientation setup and then click OK
5. At the Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin (*Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page*). Then click OK.
6. At the Report Designer screen, if there is no Report Controls Toolbar, you can enable it by-clicking onto View at the top menu and then Report Controls Toolbar.
7. At the Report Controls Toolbar, click onto **A** and then at the spot where you want the text, and then start typing.
8. When finish typing one set of text, click onto the arrow in the Report Controls Toolbar. Then you can select the text you just typed, to move it, or to change the font and size by clicking onto Format at the top menu and then Font.
9. To type another set of text, repeat the above steps.
10. To draw a box with rounded corners, at the Report Controls Toolbar, click onto the button with the oval shape. Then at the spot where you want, click-and-drag from one corner to the opposite corner.
11. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save.

To insert a picture in a report:

(e.g. company logo)

Important: the picture must be put in the V2K folder, and must be in bitmap format.

1. Exit completely out of Vision and go back in and log in as SXR. (*If you do not have a Login Id called SXR, go to Maintenance and then Login Id & Password. Then create a **New** record with Login Id called "SXR"*)

Note: To access this “adding or editing text” feature, you must exit out of Vision and then re-start. Just change Login by clicking onto the File menu and Login with a new User Id is not good enough

2. In Vision, go to Maintenance and then Report Setup. Click onto List and Select the report you want to customise
3. Click onto the “Modify Report Layout” button near the bottom of the screen. In the screen with the warning message, click onto OK
4. At the Print Setup screen, check the Printer, Paper size, Tray and Orientation setup and then click OK
5. At the Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin (*Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page*). Then click OK
6. At the Report Designer screen, if there is no Report Controls Toolbar, you can enable it by-clicking onto View at the top menu and then Report Controls Toolbar
7. At the Report Controls Toolbar, click onto the button for Picture/ActiveX Bound Control and then at the spot where you want to insert the picture
8. A Report Picture screen will come up. At File, click onto the square button to select the bitmap file of the picture.

Important: *For network, you MUST select through “My Network Places”. At File, it should say something like \\ComputerName\C\v2k\Filename*
9. Further down in the screen, select “Scale Picture, retain shape” and then click OK
10. The picture will be displayed in the report. To re-size it, click-and-drag at one of the dots at the 4 corners. To move it, click-and-drag at the middle of the picture to wherever you want it to be
11. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save

Pre-customised Reports

In Vision, there are optional reports that are already pre-customised. All you need to do is to go to Report Setup, enter in the “Optional Report File” for the report you want to change:

Report Name	Optional Report File	Description
Invoice	vInvoiceBC	With Barcode
Invoice & Rx	vInvoice_RxBC	With Barcode
Invoice / Payment	vInvoice_PaymentBC	With Barcode

Invoice / Payment & Rx	vInvoice_Payment_RxBC	With Barcode
Account Statement	vBPStatmBC	With Barcode
Account Statement & Rx	vBPStatmRxBC	With Barcode

Staff Code & Password

This option is for setting up staff codes and passwords. This is needed when N or E is setup for Bill/Pay/Cash Sale under Login Id and/or there is a Y next to Staff Password on Stock Adjustment. In this circumstance, when a staff member deletes a Bill/Pay or Cash Sale record or adjusts stock, the staff member's code and password will be asked for and the deleted record will be shown in the Deleted Account Report under Financial. In other words, unique staff codes and passwords have to be setup for every staff member.

If R is setup for Bill/Pay/Cash Sale under Login, when a staff deletes a Bill/Pay or Cash Sale record, no staff password will be asked for and the deleted record will not show up in the Deleted Account Report.

Suburb & Postcode

This is to store details of suburbs, postcodes and states used in Vision. Vision comes with a list of pre-entered suburbs and postcodes. This list can be added to and modified as necessary.

Add Suburb & Postcode record

For adding a Suburb & Postcode record, just perform the following steps:

1. Select the "Suburb & Postcode" option from the Maintenance Menu.
2. From the top Toolbar, select the "New" button by clicking the mouse on it.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. After the entry is finished, press F9 to save the record or click on the Save button.

Modify Previous Lens Code & Item No record

For Modifying a Suburb & Postcode record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Toolbar. Click onto the Modify option with the mouse; or use the ↑↓ keys to move the cursor to Select and press Enter.
 - Using the "Prev" or "Next" option on the top ToolBar
2. Click the Modify button with the mouse.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. After Modifying is finished, press F9 to save the record or click on the Save button.

Supplier's Details

This option is for storing information about suppliers. You can have as many records as you want. On the Maintenance Menu, just click onto the "Supplier Details" option with the mouse. The Supplier Details screen will then be displayed.

Fields of Supplier Details screen

The fields are places where the actual data of the screens are stored. Some of the fields of the Supplier Details screen are as follows:

Supplier Code This is the code for each supplier for easy data entry.

NOTE

The Supplier Code has to be unique for each Supplier.

Account Number The account number the practice has with this supplier.

Add New Supplier record

For adding a new Supplier record, just perform the following steps:

1. Select the Supplier Details option from the Maintenance Menu by clicking the mouse on the option . The Supplier screen will then be displayed.

2. From the top Toolbbar of the screen, select the "New" option by clicking the mouse on the button.
3. A new record will be displayed. The cursor will come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab key on the keyboard to move the cursor to the desired position.
5. After entry is finished, press F9 to save the record.
6. To exit from this screen back to the previous screen, just click onto the "X" on the top right corner of the screen or press Esc on the keyboard.

Modify Previous Supplier record

For Modifying a previous Supplier record, just perform the following steps:

1. Select the required record by:
 - Using the "List" Option on the top Toolbar.
Click onto the List option with the mouse and use the ↑↓ keys to move the cursor to the desired record and press Enter.
 - Using the "Prev" or "Next" option on the top ToolBar
2. Click on the Modify button with the mouse or press Control-M.
3. The cursor will then come down to the first field of the screen, ready for data entry.
4. On the screen, just click with the mouse, or use the Tab keys on the keyboard to move the cursor to the desired position.
5. After Modifying is finished, press F9 to save the record.
6. To exit from this screen, just click onto the “X” on the top right corner of the screen with the mouse, or press Esc on the keyboard.

Chapter Sixteen

Update

Download Update

Vision updates can be downloaded via Internet:

1. Go to our website **www.sunixvision.com** Then to Downloads, and Update.
2. At the top menu, click onto the “Elite Update”.
3. In the Update Procedure, click onto the “Elite Update”
4. You will be asked whether to run it through the internet or save it in disk. Select “save in disk” (disk means hard disk).
5. Then you will be asked where to save the file in. Click onto the white rectangular box next to Save In to bring up a Pick List. Select (C:). Do NOT save in the Desktop or the Vision folder. (The download will take about 30 minutes for Dial-up, or a few minutes for ADSL or cable.)
6. When the download is complete, exit out of Vision in all computers
7. Backup Vision
8. Then run the EliteUpdate.exe program that you just downloaded, by:
 - a. Double click onto My Computer, then onto the (C:)
 - b. Right click onto **EliteUpdate** or **EliteUpdate.exe** and then left click onto Properties to check the date and size (should be over 8MB).
 - c. Then cancel out of the Properties and double click onto **EliteUpdate** or **EliteUpdate.exe**
 - d. At the Welcome screen, click onto Next

- e. At the Choose Destination Location screen:
 - If your Vision is in the C:\V2K folder, then just click onto Next
 - If your Vision is located in a different folder, click onto Browse to change the drive and/or folder. Then click OK and it will come up “the folder already exists”. Click onto “Yes” and it will take you back to the Choose Destination Location screen where you can make a final check to make sure it is the correct location, and then click Next.
 - f. Then click onto Next and Next. The files will start installing (this will take a little while).
 - g. It will then go to a white Microsoft Visual Foxpro screen to continue updating (this will take a little while again).
 - h. At the Installation Complete screen, click onto Finish.
9. From our website, you can click onto the **Elite Update Log** button at the left and print out the list of new features or changes.