

Contents

NHS voucher limits	2
Default order types	3
Default blank sizes.....	4
Default workshop.....	4
Default order lenses	5
Promotions	5
Creating a promotion	5
Adding products in bulk	6
Adding individual products	9
Editing and deleting promotion products	10
Additional configuration options.....	11
Delete dispense estimate	11

NHS voucher limits

This function allows you to set a maximum lens price covered by an NHS voucher. E.g. If you usually dispense patients with an NHS voucher A with a lens that is on the system at £50, you can set the system to discount the £50 to the voucher value when you click the “Adjust Lens Prices” button in the dispense module.

In the maintenance module, go to the Misc. 3 tab.

Fill the boxes in from left to right as shown below.

Voucher Limits

	Branch	Lens Type	Voucher	Limit
▶	All Branches	Single Vision	A	£45.00
	All Branches	Bifocal	E	£75.00
	All Branches	Single Vision	C	£95.00
	All Branches	Bifocal	F	£95.00
	All Branches	Bifocal	G	£110.00
	All Branches	Single Vision	B	£176.00
	All Branches	Single Vision	D	£190.00

Add

1. Select the branch that this applies to from the dropdown list.

2. Select the lens type that the voucher applies to from the dropdown list.

3. Select the voucher type from the dropdown list.

4. Enter the value of the lenses that you are happy to be covered by the voucher in the last box.

A screenshot of a text input field with a grey border and a light grey background. The number '200' is centered within the field.

5. Click add.

E.g. If you now dispense a £100 frame and a pair of lenses that come to £200 the patient would only pay £100 for the frame with no extra to pay towards the lenses, as the lens price would be discounted to the voucher value.

Default order types

In the dispensing module there is an order type drop down list where you can select from options such as prepare and advise, remote edging, uncut ect. You can set a default for this list so that your most common order type is already selected so that you do not have to change it each time.

1. Navigate to the correct branch using the arrow buttons in the top left-hand corner.

A screenshot of a software interface for 'Bristol Eyecare (RE) - England'. At the top, there are navigation arrows, a 'Branch 1 of 9' label, and a 'Save' button. Below this is a 'Copy Details From' button and a 'Percent VATable' label. At the bottom, there is a 'VAT Number' field containing '870 1686 16'.

2. On the right-hand side at the bottom of the screen is a dropdown list to select your default order type. E.g. If you have a tracer and you remote edge the majority of your orders you can set the default to “remote edging” and the orders will automatically show as “remote edging”. This can be altered at dispenses when necessary.

A screenshot of a dropdown menu for 'Default Order Type'. The menu is open, showing several options: '(PLEASE SELECT)', 'Supply frame', 'Reglaze enclosed', 'Frame enclosed', 'Await receipt of frame', 'Prepare and advise', 'Remote edging', 'Repair enclosed', and 'Uncut'. The 'Remote edging' option is highlighted in blue.

3. Click save at the top left-hand corner of the screen to save the changes made to the branch.

A screenshot of the same software interface as above, but with the 'Save' button highlighted by a yellow box. The 'Default Order Type' dropdown menu is no longer visible.

Default blank sizes

In the Misc. 3 tab in the maintenance module, you can set default blank sizes.

Default Blank Size: Default Min: Default Max:

Default workshop

When dispensing, you select the workshop that your order is going to. If you generally use one workshop more than the others you can set a default workshop in the branches tab. When you go into the dispensing module, your default workshop will already be selected. This can be changed manually at the time of dispense if needed.

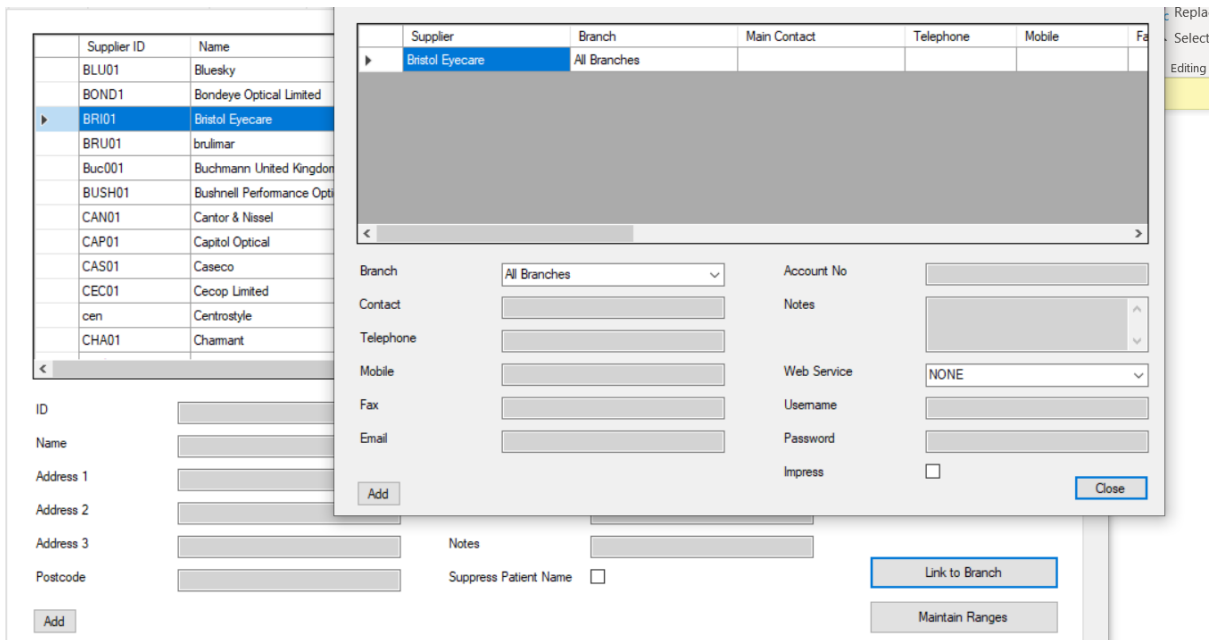
In the branches tab select your default workshop from the dropdown list. This list is populated from the suppliers tab.

Px Folders Path	<input type="text" value="c:\temp\"/>
Default Workshop	<input type="text" value="Bristol Eyecare"/> Please re to be link
DocMail Username	<input type="text" value="brulimar"/>
DocMail Password	<input type="text" value="Buchmann United Kingdom"/>
Max Receipts	<input type="text" value="Bushnell Performance Optics UK Ltd"/>
Background Colour	<input type="text" value="Cantor & Nissel"/> receipt queu

Capitol Optical
Carl Zeiss UK Ltd. (Spec Lenses & Fr
Caseco
Case Limited

Please note: You need to make sure that the supplier you select as a default workshop is assigned to your branch:

In the suppliers tab, highlight the supplier and click on the “Link to branch” button. Any branch that this supplier is linked to is listed in the top box. If you need to link your branch to the supplier, select the branch from the drop-down list and fill in any account details you need to in the boxes in the bottom half of the page and click on “add”, then “close”.



If you use remote edging and the orders are not sent to a workshop to be glazed but are put together in practice instead, you can create a supplier in the suppliers tab with the same name as your practice.

Default order lenses

In the misc 3 tab you can tick the “Order Lenses by Default” check box. This will then automatically check the “order lenses” checkbox in the dispensing module.

Promotions

You can create promotions packages in the promotions tab in maintenance. This allows the user to select frames and lenses at reduced prices when they select the promotion in the dispense module. You can add either frames or lenses or a combination of both. If you add both frames and lenses to a promotion you will only be able to select a combination of the promotion frames and lenses for the promotion to work.

Creating a promotion

In the maintenance module go to the promotions tab.

1. Fill in the boxes from the top half of the screen from left to right.

Promotion Name	Branch	Start Date	End Date
Budget Range	All Branches	01-Jan-2017	30-Jul-2021
frame promo	All Branches	10-Jun-2020	30-Jul-2021
▶ Summer 2020	All Branches	01/06/2020	01/10/2020
Sunglasses	Bristol Eyecare	01-Aug-2017	30-Aug-2017
Winter Driving 2019	All Branches	01/10/2019	31/012/2019

Add All Branches Remove Date Remove Date

In the first box, type in the name of the promotion. This is what will show up in your promotions list in the dispensing module.

In the next box, choose from the dropdown list which branch this promotion is available in.

If you have a start date for the promotion you can select this from the date box, or check the box for “remove date” if you don’t have a specific start date.

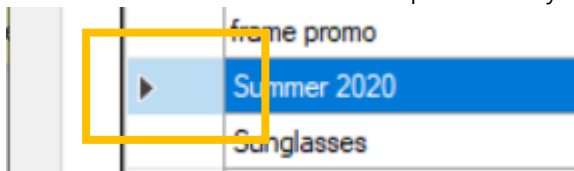
In the next date box you can select a date for the promotion to automatically end, or check the “remove date” box underneath if the promotion is open ended.

- When these have all been filled in you can click add.

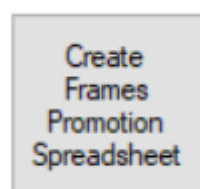
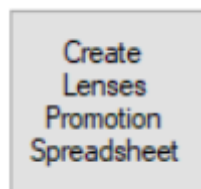
Adding products in bulk

You can add lenses and frames to the promotion in two ways. If you would like to add lenses in bulk you can use the spreadsheet.

- Highlight the promotion you want to add to by clicking next to it in the top part of the screen. The arrow shows which promotion you are editing.



- Click on the “create *Lenses/Frame* promotions spreadsheet” on the right-hand side.



This will open a new window.

- You can filter what lenses of frames you would like to export using the checkboxes. E.g. you could only export lenses from a certain supplier.

Sale Price From
 Sale Price To
 Supplier
 Range
 Include Obsolete
 Re-Ordering Only

Search Products

TOTAL: 0

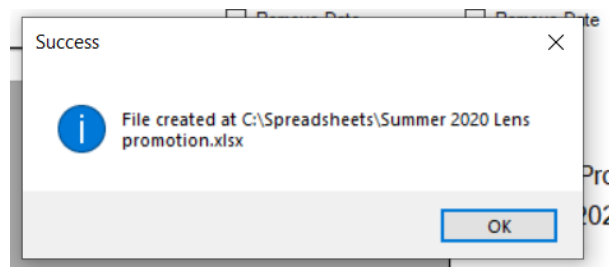
- Click on "Search Products". This will show you how many products are going to be included on the spreadsheet. Then click on "create spreadsheet".

Search Products

TOTAL: 866

Create Spreadsheet

- Choose the location that you would like the spreadsheet to be saved, name it and click "save"
- You will see the following message when the spreadsheet has been created.



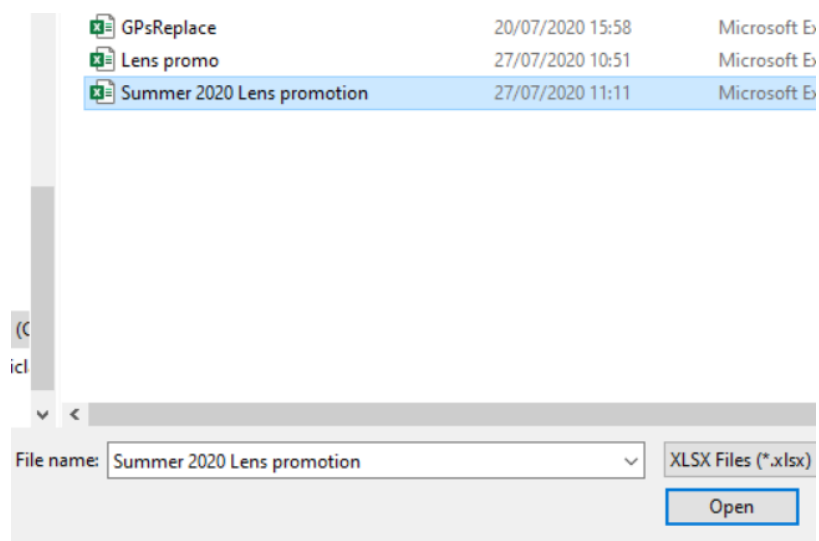
- Open the spreadsheet from the file location to edit.
- Any lenses that are NOT included in the promotion need to be deleted from the spreadsheet. You can add the promotion price of the frame or lenses in the "Sale Price" column. If you are purchasing the products at a different cost price to usual you can add this cost price in the "cost price" column.

	A	B	C	D	E	F	G	H	I	J
1	SCU Code	Description	Product Group	Analysis Type	Supplier	Range	Lens Type	Sale Price	Cost Price	Obsolete
2	Nikon000001	Digilife 1.74 SeeCoat Drive	Lens	Occ	Nikon		Occupational	£227.50	£0.00	
3	Nikon000002	Digilife 1.67 SeeCoat Drive	Lens	Occ	Nikon		Occupational	£205.00	£0.00	
4	Nikon000003	Digilife 1.6 SeeCoat Drive	Lens	Occ	Nikon		Occupational	£182.50	£0.00	
5	Nikon000004	Digilife 1.53 SeeCoat Drive	Lens	Occ	Nikon		Occupational	£182.50	£0.00	
6	Nikon000005	Digilife 1.5 SeeCoat Drive	Lens	Occ	Nikon		Occupational	£160.00	£0.00	

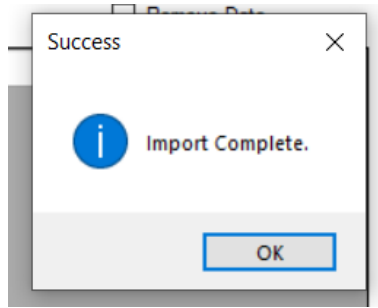
9. Save the spreadsheet.
10. In the promotions tab in the maintenance module you can import your spreadsheet.
Click on the “Import *Lenses/Frame* Promotion Spreadsheet” button.



11. Select your spreadsheet and click open.



12. When the spreadsheet has been successfully imported you will see the following message.



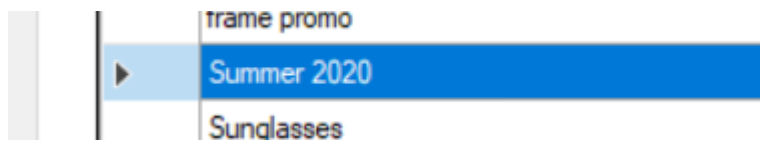
13. The imported products will now show in the bottom window.

Product Description	Cost Price	Sale Price
▶ Digilife 1.74 SeeCoat Drive	£0.00	£227.50
Digilife 1.67 SeeCoat Drive	£0.00	£205.00
Digilife 1.6 SeeCoat Drive	£0.00	£182.50
Digilife 1.53 SeeCoat Drive	£0.00	£182.50
Digilife 1.5 SeeCoat Drive	£0.00	£160.00
Digilife 1.74 SeeCoat Bright	£0.00	£227.50
Digilife 1.67 SeeCoat Bright	£0.00	£205.00
Digilife 1.6 SeeCoat Bright	£0.00	£182.50
Digilife 1.53 SeeCoat Bright	£0.00	£182.50

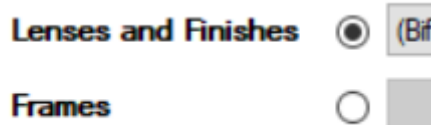
Please note: When importing spreadsheets in the promotions tab they do not override what is already assigned to the promotion. They only add extra products. If you need to remove or edit an already assigned product you need to do this in the bottom section of the screen. See removing and editing promotions below. If you are adding extra products to the promotion you do not need to include current products on the spreadsheet you only need to include what you want to add.

Adding individual products

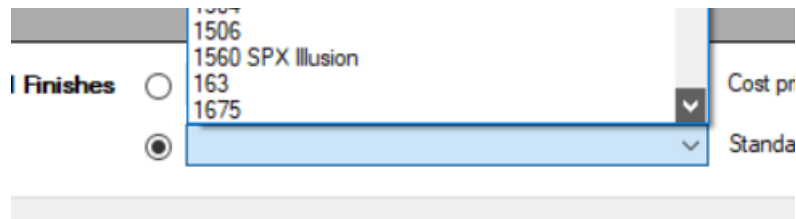
1. Highlight the promotion by clicking on it in the top part of the screen. The arrow shows which promotion you are editing.



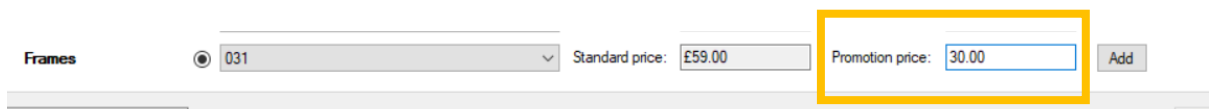
2. At the bottom of the screen. Select either "lenses and finishes" or "frames".



3. Select from the dropdown list which lens or frame you would like to add to the promotion.

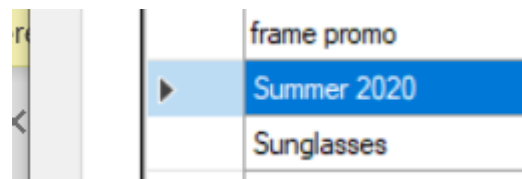


4. Enter the promotion price in the box and then click add.



Editing and deleting promotion products

1. In the promotions tab in the maintenance module, highlight the promotion you wish to edit by clicking on it in the top half of the screen. The arrow shows which promotion you are editing.



2. The products assigned to the promotion will appear in the bottom box.

Remove Date

Product Description	Cost Price	Sale Price
▶ 102	£8.00	£5.00
121	£8.00	£89.00
1261	£12.00	£99.00
1267	£12.00	£22.00
1269	£12.00	£22.00
1271	£12.00	£99.00
1273	£12.00	£99.00
1278	£12.00	£99.00
1279	£12.00	£30.00

St
Bl

You can edit the cost or sale price by clicking in the box and overtyping to the correct amount.

If you wish to delete a product from the promotion you can click it to highlight, the arrow shows which product you are editing, and the press your delete button on your keyboard.

Additional configuration options

Delete dispense estimate

You can set i-Clarity to delete dispense estimates after a given number of days. When you load the dispensing module, if there are lots of dispense estimates in the patient's record it can take longer to open the module. Navigate to the Misc tab in the maintenance module:

Step 1 Tick the box

Step 2 Type in the number of days you want the dispenses to stay in the system before being deleted.

If the box is unchecked, the system will not delete any dispense estimates.

Default deposit prompt and percentage

You can set the system to prompt for a deposit at a chosen percentage in the Misc. tab.

Tick the prompt for deposit amount checkbox

Type in what percentage of the order you would like to be paid as a deposit into the box

When you confirm an estimate dispense the following window will open and display the deposit amount:

Deposit

Please choose a payment option

Pay Full Amount £40.00

Pay Deposit £20.00

OK Cancel

Whichever amount you then select, either full amount or deposit, will automatically be ready to be paid on the till page. This amount can be changed once in the till if needed.

The image shows a payment interface. At the top, there is a 'Pay:' field containing '£40.00' and a 'Show Entire Balance' button. Below this is a numeric keypad with buttons for digits 1-9, 0, and a '(Minus)' button. A yellow circle highlights the '£20.00' value in the 'Pay:' field. Below the keypad are buttons for 'Confirm Amount' and 'Clear Amount'. At the bottom, there is a table with two columns: 'Payment Type' and 'Amount'. Below the table is a 'Total entered:' field showing '£0.00'.

Registered optician sign-off required for u16

Due to regulations regarding dispensing spectacles to under 16's, you can stop anyone who isn't a registered professional from collecting spectacles off the system. If this box is checked, when a user tries to collect spectacles off the system it will require the password of a registered professional. If the checkbox is unticked, any user will be able to collect spectacles on the system. This box is checked by default and is recommended.