

# iVend Optical 2.0 – Release Notes

Following are the new features introduced in iVend Optical 2.0:

## Optometrist Scheduling

iVend Optical 2.0 introduces the functionality of Optometrist Scheduling. With this feature user can organize and book schedule for an Optometrist at a store. This feature provides the flexibility to allocate and assign time slot for Optometrist based on optical setting defined for a store. Schedule created for an optometrist will automatically exclude the non-working days or holidays defined in corresponding store's optical setting screen.

## Appointment Booking with Optometrist

This feature allows to book an appointment for a patient/customer with an Optometrist for whom scheduling has already been done at the Store. This is followed by eye exam, order for eye glass and/or contact lens and finally billing.

## Appointment Booking with Unscheduled Optometrist

This feature allows to book an appointment for a patient/customer for an Unscheduled Optometrist i.e. for whom scheduling is not done at the Store. The appointment(s) booked this way is required to be linked to an Optometrist schedule and then followed by eye exam, order for eye glass and/or contact lens and finally billing.

## Optometrist Linking

This feature allows to link an appointment for a patient/Customer with an Optometrist for whom scheduling has been done at the Store.

## Email, SMS and Alert Notifications

This feature allows to send Email, SMS and alert notifications to Optometrists, customers and to application users.

The notifications are available for following events:

1. Email/SMS notification to optometrist once scheduling is done.
2. Email/SMS notification to customer once appointment is booked.
3. SMS notification to customer for optical order confirmation
4. Email/SMS notification to customer for tray status change (to Ready for Fulfillment).
5. Alert notification to application user for optical tray status change (to Ready for Fulfillment).
6. Alert notification to application user for optical order Confirmation.

## Appointment Reminder Notification

This feature allows to configure days for sending appointment reminder notification to customer via Email and/or SMS.

## Additional Masters (Setup Data)

A single screen with the name "Setup Data" is available to configure the values for the following additional masters:

1. **Appointment Mode** master have the valid values WalkIn, PhoneIn, Email, MobileApp etc. These values are used while booking an appointment.
2. **Base Curve** containing the valid values for the Rx Information field "Base Curve" for both eye glass and contact lens.
3. **Health Info** containing the set of questionnaire while providing an appointment details.

4. **Lead Source** containing the valid values [viz. Email, Newspaper, Website, Magazine, Friend etc.] for the field Lead Source while booking an appointment.

### Store Optical Settings

This feature allows to configure following Store specific Optical Settings related to scheduling and appointment features:

1. **Booking Start Time** for Optometrist Scheduling
2. **Booking End Time** for Optometrist Scheduling
3. **Calendar Time Slot** for calendar
4. **Appointment colors** for appointment status like No Show and Closed
5. **Week Start Day** for calendar
6. **Working Days** for a Store
7. **Holiday List** for a Store

### Optical Data Import

This feature facilitates a quick setup by enabling the user to import optical related “User Defined Table” data directly through excel.

Data for the following masters can be imported:

1. **Lens Category**
2. **Lens Type**
3. **Lens Material**
4. **Lens Color**
5. **Available Treatment**
6. **Shape Type**
7. **General Settings**
8. **Optical Settings**
9. **Working Days**
10. **Holiday List**
11. **Setup Data**
12. **Scheduling**

### Optical Data Export

This feature facilitates a quick setup by enabling the user to export optical related “User Defined Table” data to an excel file.

Data for the following masters can be exported:

1. **Lens Category**
2. **Lens Type**
3. **Lens Material**
4. **Lens Color**
5. **Available Treatment**
6. **Shape Type**
7. **General Settings**
8. **Optical Settings**
9. **Working Days**

10. **Holiday List**
11. **Setup Data**
12. **Scheduling**

### **Resend Schedule Notification**

This feature facilitates re-sending the Email and/or SMS notification to the Optometrist about the schedule.

### **Resend Appointment Notification**

This feature facilitates re-sending the Email and/or SMS notification to the customer about the appointment.

### **Additional Reports**

Following reports related to scheduling and appointment features are available in the system:

1. **Appointment Card:** This report prints the appointment details of the customer, mentioning the Optometrist with whom the appointment is booked, Date, Time, Appointment Reason, location etc.
2. **Optometrist Schedule:** This report provide the details of the Optometrist schedules based on date, Optometrist and status.
3. **Appointment Report:** This report provide the details of the appointments based on date, Optometrist, Store and appointment status.
4. **Appointment Call List Report:** This report provide the list of the appointments of the customers who may be contacted via phone before the appointment.
5. **Appointment Conversion:** This report provide the details of the appointments for which the orders are placed and is based on date, Optometrist, Store and Customer.