



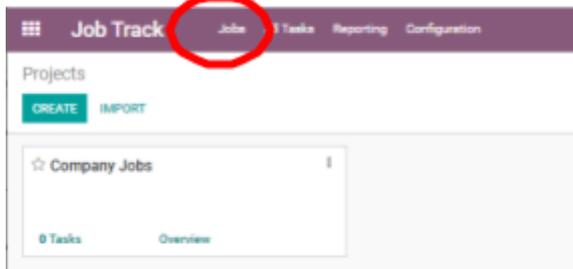
Training Manual

Humint O Lite
Version 16



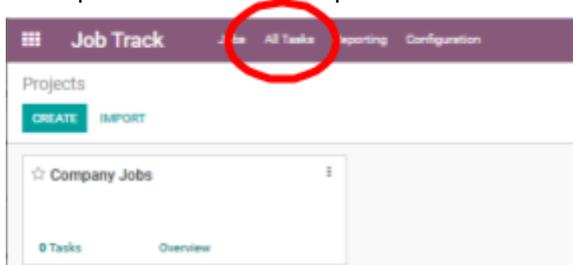
Job Tracking

When you open the Job Track manual, it will open this window:

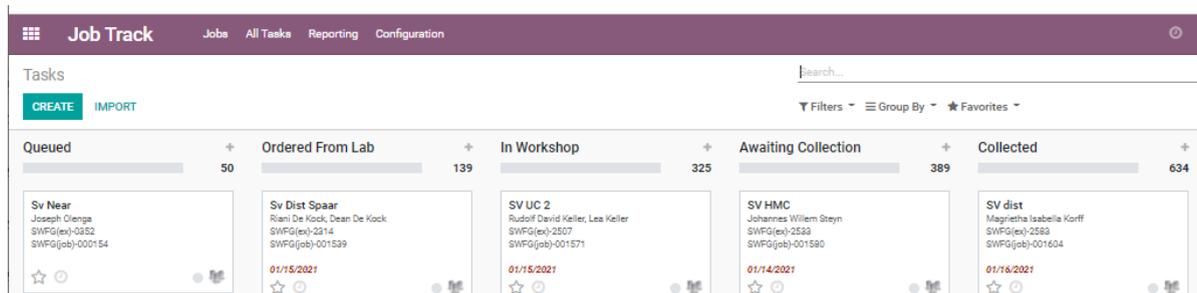


The projects will be listed here (This is the Jobs App)

Click on All Tasks and then click on the X next to (My Tasks) in the search bar to view all the Jobs that were placed in the Orders queue.



There are a couple of [stages](#) that your job can be placed in, depending on the status of the job. You can also use the search bar to find a specific Job by searching the name or the Job number.



- **Queued** – This is where the job is placed as soon as you click, Place in orders queue on the dispensing sheet.
- **Ordered from lab** – Job ordered in from a supplier
- **In workshop** – Job placed directly in the workshop
- **Awaiting collection** – Job is ready to be collected
- **Collected** – The patient has collected the job

How a Job is displayed in the stages is up to you.

Kanban View will list the stages in columns. You can move the jobs with drag & drop between the stages.



List view will list the jobs below each other. Now you can sort it according to the category by clicking on the heading.

Title	Project	Assigned to	Planned Hours	Remaining Hours	Stage	Progress
<input type="checkbox"/> sv dist		Alex Janse van Nieuwenhuizen	00:00	00:00	Queued	0%
<input type="checkbox"/> sv dist		Marno Plaisier	00:00	00:00	Queued	0%
<input type="checkbox"/> dist CLEAR AR		Alex Janse van Nieuwenhuizen	00:00	00:00	Queued	0%

The Task / Job will appear in the Kanban view automatically.

The details listed on the job are as follows:

DIST ARC
 Werner V Viljoen
 SWFG(ex)-1103
 SWFG(job)-000638

12/03/2020

☆ ⌚

- Job Name – DIST ARC
- Patient name – Werner V Viljoen
- Exam number – SWFG(ex)-1103
- Job number – SWFG(job)-000638
- Deadline date – 12/03/2020

The Star - this job will be listed as Favourites/follow-ups

The Clock – This is the scheduled reminder you can set on this job to make sure that it is completed in time.

EG. Set the reminder for 2 or 3 days before the deadline, if you don't have the lenses for the job yet, you can phone the supplier and follow up before the patient deadline is due.

When you open a Job, it will look like this:

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
DIST ARC	-1.75	-0.25	170		0.50	0.00	-1.75	-0.25	5		0.50	0.00

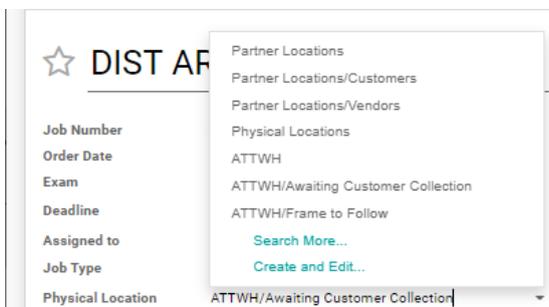
Final RX (Spectacles)

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
DIST ARC	-1.75	-0.25	170		0.50	0.00	-1.75	-0.25	5		0.50	0.00



The Job name will be listed on top, followed by all the patient’s information needed for a Job order. You will be able to Edit the following if you click on the EDIT icon top left:

- Order date – will be automatically entered
- Exam number – will be automatically entered
- Enter the DEADLINE date as per order
- ASSIGN to the orders department
- Job Type – will be automatically entered as per dispensing and invoicing
- PHYSICAL LOCATION – This will be determined by the status of the job



- Here, there will be some pre-loaded locations, but you can add new descriptions by clicking on create and edit, or you can view all the pre-loaded options not reflecting on the dropdown list by clicking on Search more.
- Tray – Here, you enter the tray number when the job goes into the Lab
- To view the LAB ORDER, you click on Fitting details as indicated below.

The LAB ORDER (Fitting details)

Examination

Fitting Details

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
DIST ARC	-1.75	-0.25	170		0.50	0.00	-1.75	-0.25	5		0.50	0.00

	R	L
Pupil Heights	0.00	0.00
Mono	0.00	0.00
Seg Heights	0.00	0.00
PD	+61.00	+59.00

A	B	D	E
0.00	0.00	0.00	0.00

Shape 0.00

Special Instructions
SV DIST

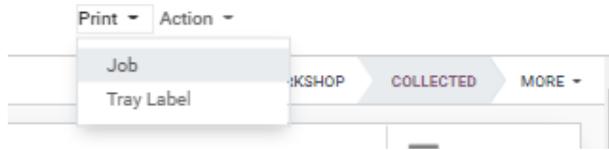
1.56 HMC STOCK

FULL METAL FRAME

Product	Description	ICD10	Quantity	Unit Price	Taxes	Discount (%)	Subtotal	Total	Currency
[81BS001] Single Vision (Standard)	[81BS001] Single Vision (Standard)	(H52.1)	1.000	320.00	Sales Tax 15.00%	0.00	R 278.26		ZAR
		(H52.4)							

CANCEL

Save your changes. Then in the middle at the top of the screen, you will see the print option. You can click on Print – Job



Once you click print – The document will download, and you can open the PDF by clicking on it. You can either then save and mail the order or print it out.

The following details are listed on the order:

Spectacle Warehouse
Spectacle Warehouse Atterbury
505 Indiana Avenue
Faerie Glen
Pretoria GT 0183
South Africa

Werner V Viljoen
Birchleigh Security Village 7
Voelkrostraat 3
Birchleigh GT 1618
South Africa
+27 79 895 7162
werraviljoen@gmail.com

JOB #: SWFG(job)-000638

Job Date:	Deadline Date:	Service Date:	Optometrist:	Dispenser:	Assigned To:	Job Type:
12/02/2020	12/03/2020	12/02/2020	Matthew Jackson	Charal Smit	Ro-Ann Amsterdam	Spectacles

Patient Name: Werner V Viljoen

Fitting Details

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
DIST ARC	-1.75	-0.25	170		0.5	0.0	-1.75	-0.25	5		0.5	0.0

	R	L		R	L		R	L		R	L
Pupil Heights	0.0	0.0	Mono	0.0	0.0	Seg Heights	0.0	0.0	PD	61.0	59.0

A	B	D	E
0.0	0.0	0.0	0.0

Shape: 0.0
Special Instructions: SV DIST
1.56 HMC STOCK
FULL METAL FRAME

- Company details
- Patient details
- Job number
- Job date
- Deadline date
- Service date
- Optometrist
- Assigned to -orders
- Job type
- Fitting details
- Script
- Heights and Mono's
- PD
- Frame measurements
- Frame shape

- Special Instructions
- And on the second page, the items that were invoiced.

Products

Product	Description	Quantity
(8185001) Single Vision (Standard)	(8185001) Single Vision (Standard)	1.0
(70002) Single Vision 1.56 HMC Base	(70002) Single Vision 1.56 HMC Stock	1.0
(8185001) Single Vision (Standard)	(8185001) Single Vision (Standard)	1.0
(70002) Single Vision 1.56 HMC Base	(70002) Single Vision 1.56 HMC Stock	1.0
(38713) Puma PU15419 BL Puma Opt	(38713) Puma PU15419 BL Puma Opt	1.0

Send message Log note Schedule activity

Today

Frans Stone 15 minutes ago
Thank you for collecting your new Spectacles! Don't hesitate to contact us if there is anything we can help with. Team Spectacle Warehouse

Frans Stone 15 minutes ago
Stage changed
• Stage Ordered From Lab → Collected

December 2, 2020

Raana Nation 2 months ago
PHONE ON VOICEMAIL

December 2, 2020

The history of the job will show on the bottom or the right-hand side of your screen, depending on your screen width and resolution.

Job communication

Here you can send a direct message to the patient. Or you can email the Job order to the supplier by using the Send Message function.

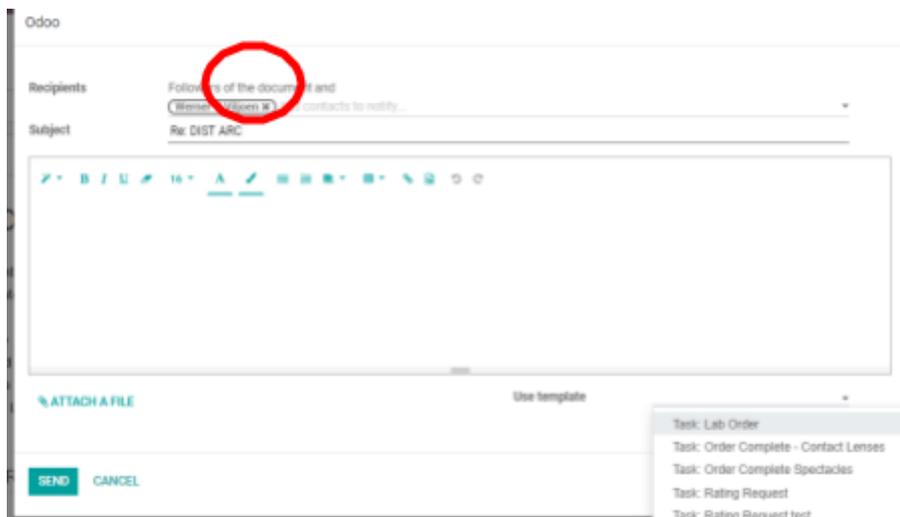


If the patient has an email address, it will be pre-loaded here, and you can send emails to the patient.

You can also use a template.

Templates can be created and pre-loaded. E.g. – Your spectacles are ready for collection.

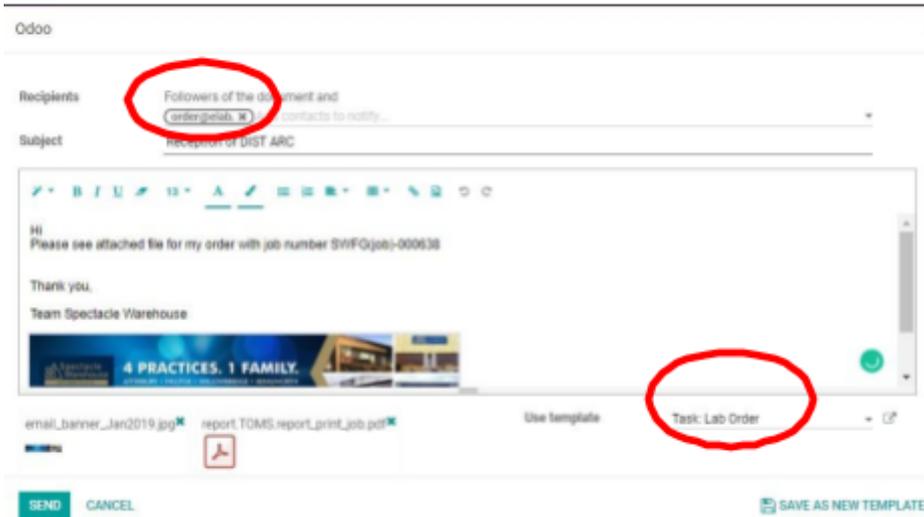
You will also use the template to send the Job order to the supplier.



- Click on the arrows in the left bottom corner of the message box

- Click on Use Template once the message box expands.
- Click on the template that you want to use.

- You will send the message to the loaded patient email address unless you change it.

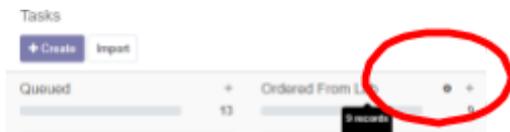


If you want to send the Lab order to the supplier. Take out the patient's email by clicking on the X next to the patient's name at Recipients. Replace with the email address of the supplier e.g., Orders@Elab.co.za Once you have the correct email in and

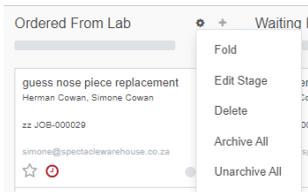
select your template, you can send the order as it has already been attached to your email as per the template setup.

Automated Job communication

Automated messages can also be sent to patients when Jobs are moved through the different stages. Eg. You can send an SMS or Email to the patient when the Job is ready for collection and moved to the "Awaiting collection" stage.



- You can click on the Icon next to the stage name to take you to the stage edit menu:



It will give you the following options:

- Fold - This will merely hide the stage, you can fold and unfold with just clicking on the sage again.

- Edit stage -

Edit Column

Stage Name Folded in Kanban

Email Template

Sms Template

active

Rating Email Template

Stage Description and Tooltips

At each stage employees can block or make task/issue ready for next stage. You can define here labels that will be displayed for the state instead of the default labels.

In Progress

Blocked

Ready for Next Stage

You can also give a tooltip about the use of the stars available in the kanban and form views.

- Here you can Edit the stage name, input an Email template and an SMS template