

Training Manual

Humint O Lite Version 16





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

🗉 🛛 Job Tra	ick .se	a) Taska	Reporting	Configuration
rojects				
CREATE IMPORT	т			
Company Job	bs			

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.

🗰 Job Track	- (All Tanks	sporting	Configuration
Projects				
CREATE IMPORT				
🕆 Company Jobs		1		
0 Tasks Over	view			

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.

🗰 Job Track	Jobs /	All Taska Reporting Configu	ration						0 9
Tasks						Sear	ch		
CREATE IMPORT						T Fil	ters 🍷 🗏 Group By 🍷 🖠	r Favorites 👻	
Queued	+	Ordered From Lab	+	In Workshop	+	Awaiting Coll	ection +	Collected	+
	50		139		325		389		634
Sv Near Joseph Olengs SWFG(ex)-0352 SWFG(job)-000154		Sv Dist Spaar Riani De Kock, Dean De Kock SWFG(ex)-2314 SWFG(job)-001539		SV UC 2 Rudolf David Keller, Lea Keller SWFG(ex)-2507 SWFG(job)-001571		SV HMC Johannes Willem S SWFG(ex)-2533 SWFG(job)-001580	iteyn	SV dist Magrietha Isabella Korff SWFG(ex)-2583 SWFG(job)-001604	
☆ ②	• #	01/15/2021 ☆ ②	• M	01/15/2021	• H	01/14/2021 ☆ ⊙	。按	01/16/2021	• M

- **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.

Tasks											\frown	`		9,
CREATE IMPORT						¥Fibert * ⊒Geo	10 Dy - #	Favorites *			View karthan a)	14	=
Queued	+ 50	Ordered From Lab	+	In Workshop	+	Awaiting Collection	*	Collected	+ 634	Awaiting P	Parts			-
(-		-								

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

Tasks			Search		G
CREATE IMPORT			▼ Filters マ ≡ Group By マ ★ Favorites マ	1-80 / 1	1537 < > 📰 🔚 🛗 🎟 🔟 🎬
Title	Project	Assigned to	Planned Hours	Remaining Hours Stage -	Progress
🔲 sv dist		Alex Janse van Nieuwenhuizen	00:00	00:00 Queued	0%
🗌 sv dist		Marno Plaisier	00:00	00:00 Queued	0%
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		Job Name – DIST ARC
Werner V Viljoen SWFG(ex)-1103		Patient name – Werner V Viljoen
SWFG(job)-000638		Exam number – SWFG(ex)-1103
12/03/2020	- M	Job number – SWFG(job)-000638 Deadline date – 12/03/2020
N O	- 45-	

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.

HARE PIU	er j sax	ID SMS								CHEERE	HHOMI LAS	IN WURKSHOP	COLLECTED	MORE
													Activ	•
습 DIS	ST A	RC												
Job Number		SWFG(job	-000638					Customer		Werner	V Viljoen			
Order Date		12/02/203	10					Mobile		+27 79	8957162			
Exam		SWFG(ex)	-1103					Phone		+27 79	8957162			
Deadline		12/03/203	10					Work Phone		011690	0911			
Assigned to		Ro-Ann Ar	naterdam					Email		werray	loan@gm	ail.com		
Job Type		Spectacle						Repurchase						
Physical Loca	tion	ATTWH/A	waiting Cu	etomer Col	lection.									
Tray		T163												
Final RX (Specta	acles)												
Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Aals	Prism	Add	Va		
DIST ARC	-1.75	-0.25	170		0.50	0.00	-1.75	-0.25	5		0.50	0.00	O DETAIL O	

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

Final RX (S	pectad	les)										
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	0.0 FITTING DETAILS

HUMINT

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:

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

	Partner Locations Partner Locations/Customers Partner Locations/Vendors	
Job Number	Physical Locations	
Order Date	ATTWH	
Exam	ATTWH/Awaiting Customer Collection	1
Deadline	ATTWH/Frame to Follow	
Assigned to	Search More	
Job Type	Create and Edit	
Physical Location	ATTWH/Awaiting Customer Collection	-

- 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.
- \circ Tray Here, you enter the tray number when the job goes into the Lab
- \circ $\,$ To view the LAB ORDER, you click on Fitting details as indicated below.

Fitting Det	tails												
Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Ax	is Pr	rism	Add	Va
DIST ARC	-1.75	-0.25	170		0.50	0.00	-1.75	-0.2	25 5			0.50	0.00
	R		ii.										
Pupil Heights	0.00		0.00										
Mono	0.00		0.00										
Seg Heights	0.00		0.00										
PD	+61.00		+59.00										
A	В	D		E									
0.00	0.00	0.00		0.00									
Shape	0.00												
Special Instruct	tions												
SV DIST													
1.56 HMC STO	ск												
FULL METAL FF	RAME												
						Unit			Discount				
Product	Desc	ription	ICD1	0	Quantity	Price	Taxes		(%)	Subtotal	Total	Currency	
[81BS001] Sing	ple [81B5	S001] Single	(H52	D	1,000	320.00	(Sales Tax 1	5.00%)	0.00	R 278.20	5	ZAR	

The LAB ORDER (Fitting details)

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

Print - Action	-		
Job		001150755	
Tray Label	KSHOP	COLLECTED	MORE *

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:

			Pretoria South A	a GT 0183 Vrica								
Werner V V Birchleigh S Voiloostraa Birchleigh C South Africa +27 79 895 werraviljoer	lijoen ecurity Vilag t 3 t 1618 a 7162 i@gmail.com	£7.										
JOB #	SWF	G(jol	o)-00	00638								
Job Date: 12/02/2020	Deadli 12/03	ne Date: /2020	5e	Invice Date: 2/02/2020	Optor	netrist: new Jac	Dis kson Cha	penser: intel Smit	A	signed Tec Ann Amsteri	Jam 5	ab Type: pertacles
Patient Nan	ne: Werner V	Vijoen									576 2	
itting D	Details											
	Sph	Cyl	As	is Prism	Add	v	s Sph	Cyl	Aa	dis Pritern	Add	Va
Name			17	o	0.5	0)	0 -1.75	-0.25	5		0.5	0.0
Name DIST ARC	-1.75	-0.25										
Name DIST ARC	-1.75 R	-0.25	L		R	L		R	L		R	L
Name DIST ARC Pupil Heights	-1.75 R 0.0	0.25	L 0.0	Mono	R 0.0	L 0.0	Seg Heights	R 0.0	L 0.0	PD	R 61.0	L 59.0
Name DIST ARC Pupil Heights A	-1.75 R 0.0	0.25	L 0.0 8	Mono	R 0.0	L 0.0	Seg Heights	R 0.0	L 0.0	PD	R 61.0	L 59.0
Name DIST ARC Pupil Heights A 0.0	-1.75 R 0.0	-0.25	L 00 8 00	Mono	R 0.0	L 0.0 D 0.0	Seg Heights	R 0.0	L 0.0	PD E 0.0	R 61.0	L 59.D
Name DIST ARC Pupil Heights A 0.0 Nape pecial Instrus V DIST	-1.75 R 0.0 0.0 Clom	0.25	L 00 8 00	Mono	R 0.0	L 0.0 D 0.0	Sog Heights	R 0.0	L 0.0	PD E 0.0	R 61.0	L 59.D

- 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 -

- Products ICL: Single Vision (Standard) (#185001) Single Vision (Standard) 1.0 (70002) Single Vision 1.56 HMC Stock (8185001) Single Vision (Standard) 2 Single Vision 1.56 HMC Base DL Single Vision (Standard) 1.0 Single Vision 1.56 HMC Base (70002) Single Vision 1.56 HMC Stock 1.0 13| Puma PU/15419 BL Puma Opt |38713| Puma PU15419 BL Puma Opt 1.0 Send message Log note @ Schedule activity .0 Follow 44 -Ent. Frans Stone - 11 -----Thank you for collecting your n Frans Stone - 11 Stage changed · Stage: Ordered Fr wr 3, 2000 Note by Riama Nation December 2, 2020
- And on the second page, the items that were invoiced. -

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.

Send me	Log note O Schedule activity	⊗0	Follow	4 4 ×
	Te: Fallowers of 'DIST ARC' Viljoen (werraviljoen@gmail.com)			
0	Write something			
	SEND			

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.

Odoo	\sim		Click on the
Recipients	Followers of the document and (Nersen Alfoen x) or contacts to notify		arrows in the left bottom
Subject	Re: DIST ARC		corner of the
Z = B / U	- 16- <u>A</u> = = R - R - N R 5 C		message box
-		ngiate -	
CALING ATATILE			
1		Task: Lab Order	

- Click on Use Template once the message box expands. 0
- Click on the template that you want to use. 0

34 Odoo Recipients Subject ۰. 12 5 0 HI Please see attached file for my order with job number SW/FG(job)-000638 Thank you Team Spectacle Warehouse 4 PRACTICES. 1 FAMILY. Use term t TOMS report print job pdf email_banner_lan2019.jpg 2 SEND CANCEL SAVE AS NEW TEMPLATE correct email in and

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

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



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 -

Stage Name	Ordered From Lab	Folded in Kanban	
Email Template		-	
Sms Template		-	
active			
Rating Email		-	
Template Stage Descrij At each stage employ	otion and Tooltips	idy for next stage. You can define here labels	s that will be displayed for the state instead of the default
Femplate Stage Descrij At each stage employ abels.	otion and Tooltips ees can block or make task/issue rea	dy for next stage. You can define here labels	s that will be displayed for the state instead of the default
Femplate Stage Descrij At each stage employ abels.	otion and Tooltips ees can block or make task/issue rea	dy for next stage. You can define here labels	s that will be displayed for the state instead of the default
Template Stage Descrij At each stage employ abels.	otion and Tooltips ees can block or make task/issue rea In Progress Blocked	dy for next stage. You can define here label:	s that will be displayed for the state instead of the default
Template Stage Descrij At each stage employ labels.	otion and Tooltips ees can block or make task/issue rea In Progress Blocked Ready for Next Stage	dy for next stage. You can define here labels	s that will be displayed for the state instead of the default

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