Optizone Enterprise - Features

Access Level	The screen "Access Level" is the value assigned to screens for staff to be able gain entry. The values for the screens is done under password control. Under store only logon, you must use the passwords assigned per level. Access level one requires no password. You can assign staff access when using the staff logon tool under password control. You may also change the "Access Level under staff administration as well. If the staff access level matches the screen access level or is higher, the staff member logged on will gain immediate access.
Accounting	Accounting is located under Reports: Sales Logs on the menu bar. You can activate level security to enable this form for certain staff under "Password Control". Select the appropriate log required for view or print. Please note that the default is today's logs, otherwise logs can be tailored chronologically as required. All reports are itemized per location.
Accounting Reports - Doctor	Optizone readily tracks salesman sales. Many practices now include doctor owners who wish to track sales from their prescriptions. Find this tool on the main menu bar under Accounting Reports. Use this tool to track doctor sales on invoice. To activate, the doctor's name or clinic must be in the doctor phone book. The doctor's name can then be inputted onto the client address screen, which will be the default on invoice or the doctors name can be changed on the invoice as well. Doctor, store location and date subjugate report selection.
Accounting Reports - Insurance	Track your insurance provider sales using the tool located under "Accounting Reports". You can activate level security to enable this form under "Password Control". You may select by stroe location and date range. View or print report as desired.
Accounting Reports - Logs	You can activate level security to enable this form under "Password Control". Go to Sales Logs on the menu bar under accounting reports and select "Sales Logs" or select "Sales Logs - Today Only" for staff reconciliation. Select a particular location or all locations. Payments - creates payment logs by day or between dates with method of payment journal. Sales And Tax - create logs by day or between dates. Cost of Goods Sold - report the cost of goods sold by day or between dates. *Note the "control" which equals the wholesale cost amount must be filled in the inventories, or if the invoice is custom, must have "control" inputted seperately on the invoice screen. Cost of Goods Sold by Invoice - report the cost of goods sold by invoice by day or between dates. Staff Sales - creates logs of individual staff sales, enter by day or between dates. Use staff sales to calculate staff production or commissions etc. All reports are itemized per location. Use the "Sales Logs - Staff" for more detailed reporting. Taxed Invoices Only - report on invoices that have a tax component only.

	For account receivables, go to accounts receivable under accounting reports on the menu bar.
Accounting Reports - Staff	Use this tool to monitor your staff productivity. Make calculations on their sales or on payments on sales. Staff numbers and names must be inputted in the staff phone directory and the staff number must be entered on the invoice for this tool to function. Find this tool under accounting reports. * When using the paid on sale tool, tax components are removed proportionately.
Accounts Receivable	Accounts receivable are created by "today's date". Normally when you are doing your year end this would be one of the reports required. All reports are itemized per location. Use the account receivable list to create an aged account receivable for a particular date. This list will calculate all past receivables up to that date. Use the account receivable - new for today list, to create daily totals.
Add Attachment	When sending an e-mail, you may add one file attachment to the letter. Click "Add Attachment" on the form, and seek the file you wish to attach. If doing an e-mail list serve to a large amount of clients, keep in mind, not to have too big of a file attached. Email programs (software) do not support large attachments.
Add Duplicate	Push the add duplicate button in the client address screen to add a family member. It will replicate all the address details. Add Duplicate is also available on the main inventory screens.
Add Inventory Only	Use this tool to allow lower level security access staff to add new inventory without giving them access to all inventory tools.
Add Last Rx To New File	To perform this function, use the "View Last Rx" button on the eyeglass or contact lens screen. Use this button function to look at previous contact lens or eyeglass prescriptions for comparison when writing a new prescription. To copy "add" old Rx to a new file, select which prescription you want to add and click on the appropiate "add" button. Typically the last Rx is the one that is being renewed, be sure that the file selected is the last file or the file that you require.
Address (client Information)	Client address is the central hub of Optizone. All defaults for the city, province and country combo boxes can be added automatically when entered. For instance, to add a city into client file, type letters until your city appears and click to enter. If in the event that a city name is the subset of a city in the database, open default data "Address Input" to put in the short name in order to make it available first. All tab buttons of records to the right (Rx glasses, contacts, exam, invoice, insurance) are sub files of this client. Use the find button to pick which client to work on from the client address file only. Use the radio button at the bottom of the form to select printer output for either chart label, mail label, notes, or personal letter. When printing notes, it will automatically print the client name first followed by the notes. You can use this function to make shipping labels other than the client form main address. Use the Up arrow to increase the size of the notes field, and then use the down arrow to return to regular size.
Address City, St. / Prov., Country	Use of default values for city, province and country are available. For client files, all defaults for the city, province and country combo boxes are added automatically when entered. For instance, to add a city into client file, type letters until your city appears and click enter. If it is not in the default database, it will be automatically entered.

If in the event that a city name is the subset of a city in the database, open default data "Address Input" to put in the short name in order to make it available first. For example, if "North Mainstreet" is in the database and you want to add only "North Main", you have to go to the main navigation screen and under Address - default data and add only "North Main". Then "North Main will become the first default selection.

For marketing purposes, it is important to use the same spelling for each client location. For example, use only "Tx" for Texas, or vice versa. Do not use both, It will make it cumbersome when you market clients by Prov./State. You want a singular reference for each unique location.

Address Labels

Standard Labels- Use Avery labels
size 1 7/16 x 4 inches

Reports etc. Use 8 1/2 x 11 standard paper

For windows NT, you must set up a custom label form.

To build label form, under my computer:
Press Printers
File
Server Properties
Create New Form
Width 3.92 Inch
Length 1.50 Inch
Press Save
Give this form a name such as "Label" and use this as the default for the label printer

For Windows - Use user defined size for labels
Width 1070 0.1 milmeters
Length 381 0.1 milimeters

Address labels - Under mailing lists, mail master list, you can use an avery 8160 label that comes on a paper 8 1/2 X 11 for large volume labels. (30 labels per page)

Alphabetical List

Using the mail master list, you can create any type of list that you desire. Use the radio button tool on the last page to set the order to client number or by alphabetical order.

Appointment Calendar

You have several options to make appointments for clients.

Under appointments in the menu bar, you may select:

Schedule Main - This schedule is for general one practitioner use. You just select the day to open and type in your appointments.

Schedule Multi-Staff - If you have many different practitioners, you will use this schedule as well. You will need to put the practitioner in the Staff Admin directory and check on "Will be on appointment Schedule Multi-Staff. When you open the Schedule Multi-Staff, these names will be available in the combo box for selection. The calendar will automatically make a separate schedule for each individual. If a practitioner no longer works at your establishment, you will want to leave their information in Staff Admin so that you can see their past appointment archives.

Close the appointment schedule when you are completed, so that others may share the schedule. Only one person can write to a specific day at a time. Multiple staff can write to different days at the same time. If you wish to view the schedule while someone else is writing to that day, you will be able to see it, but it will be read only.

You may select 15, 20 or 30-minute intervals for the schedule. Change the interval under "Set

	Appointment Interval". The appointment interval will standardize for all locations and schedules as selected. The software will automatically attenuate to the store location logged on, but you may switch to another location as required. You may print the schedule by day selection, as you require.
Appointment Recall	To activate the appointment recall, use the "Appointment Recall" field on the Client Address screen. The default value is 12 months. Use the "Interval" field to set haw many months you would like to recall your clients and click the "Update" button to set the recall date. You may reset the recall date on the "Client Exam" screen as well. Use the appointment recall to create an email, letter, mail label or phone list to contact your clients for their next appointment. Select "Mailing Lists" from the Main Menu bar and click "Appointment Recall For This Location". If you have multiple stores, you must be logged into that store to do that recall. If a Doctor's name is inputted on the Client Address screen, you may subjugate the recall list by the Doctor's name if you desire. When performing a recall and you have successfully collected your client's email addresses, you may want to email their recall first and then remove them from the list by clicking the "Update Email Only" button to reset the client's recall date to the next interval. These clients will then be removed from the list. If you are processing the rest of the recalls by using one of the other options, you will have to click the "Update All" button to push the rest of the clients to their next recall. You may also leave this clients on your list and update their recall when they actually visit. *The appointment recall tool is location sensitive (if you have multiple store locations). The default value for the client appointment recall interval is available under Business Information - Client Recall Interval. To turn off the default input of client recall , set the client recall interval to 0. When a client record is added, no recall date will be added. You can manually reset the clients' recall as you wish on edit.
Appointment Recall Update	When performing a recall and you have successfully collected your client's email addresses, you may want to email their recall first and then remove them from the list by clicking the "Update Email Only" button to reset the client's recall date to the next interval. These clients will then be removed from the list. If you are processing the rest of the recalls by using one of the other options, you will have to click the "Update All" button to push the rest of the clients to their next recall. You may also leave this clients on your list and update their recall when they actually visit. Do email appointment recalls first. It is practical to send update email first and then update them with the "Update Email Only" function. This way the clients without an email address can be sent mail only. You will save money not post mailing to the clients that you can reach at no cost with a valid email address. Your other option is to not use this function and update their recall as the clients come in or are in contact. The recall tool will send notices for three months and then stop. The email and letter notices that have been generated in appointment recall will be logged in the letter log on client information.
Avery 8160 Label	On the mail master list, you have the option of using avery 8160 labels, which come in three rows of ten on a 8 1/2 x 11 sheet. Use these labels for high volume sending of brochures etc. Tip: When simply sending a letter, use the email/marketing tools to save on mailing costs/paper costs/envelope costs.

Back - Up	EZ-ZONE Software Ltd. recommends using "Flash" Memory Sticks for back-up. You can typically purchase a USB 2.0 - 2 GB stick for arounf $40.00. To Save Instructions: 1. Close all programs. 2. Double click on "my computer". 3. Open C:\Program Files\. 4. Click once on "Optizone Enterprise" to highlight selection. 5. On the menu bar select "edit" and click on "copy". 6. Close "c:drive". 7. Double click on "removable Memory Stick". 8. On the menu bar select "edit" and click on "paste". * Note on your second time overwrite all (click yes to all.) previous files in order to have room. To Restore Instructions: 1. Close all programs. 2. Insert back-up Memory Stick. 3. Double click "my computer" 4. Double click " removable "Memory Stick" drive". 5. Click once on Optizone Enterprise to highlight. 6. On menu bar click "copy". 7. Open C:\Program Files\ 8. Click on "edit" on the menu bar and "paste". *Overwrite all (click "yes" to all.) previous files in order to have room.
Bar Code	Barcode scanning of inventory items is available on all inventories. *Note Barcode inputs are case sensitive. To check your inventories go to the modify inventory, and select inventory of your choice. Click on the count inventory tab to begin. Begin by selecting the inventory items to be counted and checked. You have the option of checking all locations, checking a single location, checking location and supplier and by "contains" field. The "contains" field allows you to search phrases from within the item description. In order for the inventory check to function, you must check all the inventory within your given selection parameters. Push the reset button to change the check quantity and checked date to zero. Click on the scan button, and began scanning or typing in the item numbers from the selection. Each time you select an item and additional single item will be added to the checked inventory. Once all items from the selection have been scanned, you may preview or print a report that will display any and all discrepancies from a list. It also calculates the wholesale value differences. At any given time, you may edit the grid to effect a change. If your results seem to be correct, you may now update the list from your inventory to reflect the checked inventory. It is important to recognize, that once the update button has been used that there is no restore. It would be a good idea for you to create a backup prior to utilizing this tool. Barcode scanner -you may utilize a wedge type barcode scanner that connects between your keyboard and your computer. These are inexpensive and easy to use. You could buy a cord long enough to reach your entire inventory from a computer station. Make sure that's the audio is turned up high enough on your computer so that you can you can hear the beep when the product you scanned has registered. Alternatively, there are also wireless scanners available to perform this task. You will have to speak to your hardware representative to have the scanner installed correctly.
Barcode Types	Use the Barcode field to tract your inventory items. 1.You can use UPC codes.

2. You can use computer generated code numbers.
3. You can create your own barcodes.
4. *Note Barcode inputs are case sensitive.

In past copies of Optizone, the barcode fields were known as quick codes. You can utilize a wedge laser scanner that connects between your keyboard and computer to scan the barcodes.

Barcodes are used to find items in the inventories when transporting to the patient file. Upon creation of a new inventory item, the default Barcode is also the computer generated product number. You may edit the Barcode to something easy to remember for items that you use frequently if you like. For example- The Barcode for a contact lens fitting may be "C", that way every time you type C in the quick code, contact lens fitting appears. Be careful to avoid duplication, likewise you may be able to remember numbers for certain items as well from the default already generated.

A list of the Barcodes is available on the inventory report tools.

Best Sellers

Use the best sellers report in inventory to see by quantity which products are selling the best.

Bill Provider

Use the Bill Provider function to create a bulk listing of insurance bills pending. This original list is generated under the client invoice posting.

Sales accounting for insurance providers:

Track your insurance provider sales using the tool located under "Accounting Reports". You can activate level security to enable this form under "Password Control". You may select by store location and date range. View or print report as desired.

Billing (Client Invoicing)

The quantity, description, wholesale and unit price is automatically generated into billing when using the inventory modules to "insert" into client records. The invoice can also be manually generated by pushing the add item button. "Control" on the invoice is the wholesale cost of the goods and must be entered on the billing screen when entering a new item that is not from inventory, otherwise it will not reflect in the cost of goods sold journal.

The invoice is automatically generated upon pressing the add button on the billing screen when the insert button is used on the contact lens, eyeglass, exam and contact lens warranty screen, transporting items from inventory. If you are adding more items to an existing invoice, use the insert (from inventory) button on the client file (contacts, eyeglass etc.) and then push the edit button on the billing screen to add these new items to the invoice.

The miscellaneous inventory holds all taxable items. Click the appropriate tax buttons. All final tax allocations are attenuated to the location where the tax was collected. When importing from the Misc Inventory using the Insert button, the tax component will transport with the item. Further use of the taxation buttons can be turned off or on as required.

The prev bal button can be used to check if this particular patient has outstanding invoices.
Paying a bill requires use of the payment button to add payment located on the center grid. The method box will journalize the type of payment, c for cash, v for visa etc.

*Note, the staff number is only allowed to be inputted on the invoice, on the add button, and is not allowed on the edit button. Invoices can not be deleted, these are controlled number. If you make an error, perhaps you can write cancel in the item section after deleting all the items.

Billing Statements

Billing statements is located on the main menu bar under "Accounting Reports".

Billing notices are created with totals of multiple invoices of outstandings. Note that invoices are paid separately on each invoice payment. To create dated billings, type the date from, otherwise it will default on today's date less 30 days. Furthermore, if you desire to see the outstanding balances on any particular client , go to that patient's billing screen and push the prev bal button. Use "Report Archive" to view the last time any of these procedures were taken.

If the client has an outstanding from an insurance provider on top of his own outstanding, you may choose to remove clients waiting for a payment from their insurance provider first. This way you will not send a bill to a client that includes the insurance bill as well.

Bulk Orders Of Inventory

Bulk orders of inventory - contact lenses, eyeglass lenses and or eyeglass frames.

To use this tool more effectively, click the "Client Product Orders" box under Business Information to checked. This will keep the boxes unchecked on the local users when they press the send email or print buttons.

Bulk orders of inventory that were not available from stock can be ordered from the client files. For instance, if a client had a frame ordered on his eyeglass file, the days order can be generated and subjugated by supplier and business location.

At the end of day, all the frames required could be ordered by individual suppliers by fax or e-mail. Certain requirements have to be made to achieve this.

1. The client has to have an order for contact lenses, eyeglass lenses and or eyeglass frames created on their file.

2. The "Ordered" check button must be off.

3. The model or type field must not be empty.

4. Supplier name and account should be filled in for faxing or email ordering to supplier. *But not required if phoning the orders to the supplier.

To use the tool, go to the inventory menu and select "Order Inventory", select "From Client File" and choose department. i.e. contacts, glasses.

Select he parameters for the order. (i.e. select store or supplier). Print to fax or e-mail and send. When completed, use the "Update" button to mark the product ordered on the client file. The products will not show on this list again unless the "Ordered" button is clicked off on the client file.

Business Information

Business information is located under "System" in the main menu. Make location 1 the HEAD OFFICE.
Type in all the information:
The following headings appear on all reports and invoices:
Company- Business name
Address- etc.
Two tax tools are available:
Tax A - Type the name and percentage for your state / province.
Tax B - Type the name and percentage for your municipal / federal etc.

For example:
PST 8%
GST 7%

Invoice Memo- Type in a sales pitch such as "Thank you for patronage." This will appear only on the invoice when printed.

Client Recall Interval - The default value for the client appointment recall interval.

The location number of the store is logged upon opening Optizone. The number will be displayed in the main screen title to let you know that you logged to the proper location. The location information will be tagged on all new files added to the client record. It is also required to locate where inventory is. Location

	1 should be assigned to head office. If more locations are required, simply contact EZ-Zone Software Ltd. Or your distributor for a passkey to increase your capacity. The new passkey will have to be entered under the "License" form located in the menu bar under "Open". Logo Letterhead- Use the logo letterhead to attach logo to letterheads. You may use one of the samples or import your own logo. Push "Get New Logo" and push add, the form will prompt you to specify the location of your logo. Your operating system will require an OLE server for this function to operate, typically *.bmp file servers come with your operating systems. You may want to speak with your graphics consultant for further information. Client bulk orders - Select this tool if you want to take client custom orders and bulk them for central processing. Appointment Recall Default - Set this tool to how many months you wait before you recall your clients. Appointment Schedules - You may select 15, 20 or 30-minute intervals for the schedule.
Calculator	Use the calculator located on the eyeglass and contact lens pages. To convert diopters into radius of curvature, type in the diopter power and push "Calculate R". To convert radius of curvature into diopters , type in the radius in mm and push "Calculate D". To use the vertex distance conversion tool, type in the power, select the vertex distance that the power was examined at, select the new vertex distance, and push "Calculate P". For contact lens power, the new vertex distance is zero. Vertex distance 13.5 is only the default vertex distance and can be changed as required. To use the manifest over refraction (MOR) tool, type in the current prescription of the client, add the MOR and click "Calculate M". Use the transpose button as required. Disclaimer of Liability - EZ-Zone Software Ltd. does not warrant or assume any legal liability or responsibility for the accuracy, completeness, or usefulness of any information generated from the use of this product.
Change Staff Logged On	If you are using "Staff Log On" you may log out a staff member under the "Exit" command in the main menu bar. You may then log on a different staff member as required.
Chart Labels	To make a chart label for a client, select chart label, before pushing the print button on the client address screen. See Printer Setup for more information.
Client Find (Search)	Under Address on the client form, push the find button. Select which tool to use, enter the information and push OK. Due to the nature of phone numbers being unique, the phone search will search against all fields i.e home, work, cell and fax number. Under list you can set the order to name, firstname, or email by clicking on the header. Highlight selection and then push OK. Under search by "contains", you can search portions of the client record and see all possible matches. On larger databases, this search may take a little longer time for results.
Client Information	To open, click on client information. Type address. City, State/Province and Country will auto default on second entry. Not having a street address or an e-mail address will activate the mail buttons. Track insured claims on client screen by using the Bill Insurance Provider tool. Type in their client card number, use the combo box to insert the insurance provider and include their claim authorization. All of these fields can be edited on the bill to reflect changes. Click on print insurance bill for invoice. Use Bill Insurance provider to track specific provider claims and account receivable.

Push the Add button on the bottom of the screen to create a new file.

Push the edit button to make changes to a file.

Push the add duplicate button to add a family member.

Use the Find button on patient address to change client. All the history files to the right of client address are belonging to only that client.

To print a mail label or letter etc., use the Select Before Print radio control before hitting the print button.

Client Product Orders

Bulk orders of inventory - contact lenses, eyeglass lenses and or eyeglass frames.

To use this tool more effectively, click the "Client Product Orders" box under Business Information to checked. This will keep the boxes unchecked on the local users when they press the send email or print buttons.

Client Type

Select the "tag" you want to put on the file from the default list under "Address Input" or from "Add New Item" on the client address file. For example: if the person is a contact lens wearer select cl. If he is a eyeglass, select eg. Or you can design whatever tag you would like, such as yellow page referral, newspaper ad etc.

Collect Web Data

Collect Web Data is a tool that allows you to link your Optizone Enterprise database directly to your web site via our officetitan.net server. The web-site database connectivity tool can be ordered from EZ-Zone Software Ltd. Your client submissions are protected with 128-bit encryption via SSL (Secured Socket Layer). This tool comes with an annual fee and setup charge.

This powerful tool can:

1. Collect all email and link the message directly to their account for easy response via the letter library.
2. Take in contact lens orders.
3. Receive address change information.
4. Collect appointment information.
5. New client registration.
6. Harvest interested parties information for future marketing.

Once they have made a submission, you still have control over the processing of these files. The "Collect Web Data" tool is also password sensitive on your Optizone Enterprise so that you can assign who has access to the submission processing.

Optizone uses ODBC - (Open Database Connectivity) tool that connects your Optizone database to your Internet web-site submissions database. Optizone uses Mysql driver 3.51 to make the connection.

Once tool is installed, click the "Collect Web Data" button.

You can remove errant files by clicking the "Remove Selected" button.

The "Add All & Process" Button will take the data and make it available under the "Process Web Data" tool located on client information on the "Address" screen.

On the client address screen click "Process Web Data", select which department you want to work on and use the "Navigate to File" button to see the record in client information. Use the "Update Address Info" button to change data to the newer data. It will only replace fields that have been filled on the collect web data. It will not overwrite fields with blank data. You can use the "Insert" button to transfer their message inquiry to the communications screen and load it into a letter using the "Insert" button on that screen. You will notice that you must navigate correctly to use this tool to avoid data file placement errors.

	When completed, click the "Order Processed" button highlighted in blue to take the item off the list. The "Collect Web Data" and "Add All & Process" button has to be run before using this tool. You may choose to click the "Remove Selected" button to remove errant files. You may review result history by using the date function tool.
Communications	Choose to add a letter from the letter library or create a specific letter. Add a file attachment to the file as required for e-mailing. Print, Fax or send by e-mail when completed. Outlook Express must be your default mail client for the e-mail to work. Under security in outlook express, turn off the button that says: Inform me when others use this program to send e-mail. View the help menu for more information. If you subscribe to "Collect Web Data" You can use the "Process Web Data" tools to populate the client inquiry / message memo field. Click the "Insert" button to put the client message into the letter as reference Use the communications log on client information to track correspondence with clients. This tool will also create letters for clients. View what correspondence was sent to this client via e mail or by letter by selecting "Past Letters". It is important when sending letters that there is a subject name so that it can be logged in this tool.
Communications Logs	Use the tool under "Mailing Lists" to view past letters and marketing that was sent to your clients.
Confirm Orders	Use the order confirmation grid for eyeglass and contact lens orders. You can check and track whether your supplier has received a contact lens or eyeglass order that was mailed or faxed from the client record. Check off the confirmed button on the client file or hit the edit button on the order grid and add a reference or tray number.
Contact Lens Order Confirmation	Use the order confirmation grid for eyeglass and contact lens orders. You can check and track whether your supplier has received a contact lens or eyeglass order that was mailed or faxed from the client record. Check off the confirmed button on the client file or hit the edit button on the order grid and add a reference or tray number.
Contact Lens Solutions Used	Track the contact lens solutions used for each client by using the default values. Click into the combo box the soulution used on the client contact lens page. Use the Contact Lens Solutions Used button on Navigate to add or edit selections.
Contact Lens Warranty	This is a in-house warranty system. Use this module to create a customized warranty for contact lenses. In inventory you can add contact lens warranty for each lens separately or have yearly or bi-yearly general contracts. For example, you can itemize gas permeable or soft lenses individually by name, or just type in "Contact Lens Warranty" in the warranty module located in modify inventory. Automatic recalls are available under the menu bar Mailing Lists. When a patient is renewing a policy, press the edit button and then press the renew one or two year button and add in the policies being renewed. This will fill the invoice upon adding a record. Contact Lens Warranty deductibles are inputed in the inventory screen and are actuated automatically on active policies when the client buys more lenses. * Note- If a client has only one lens that qualifys for insurance and the other does not, the insert from inventory will still insert the deductible the warrantied price. In other words contact lens pricing under warranty always applies to both eyes when using the client contact lens form. It will be neccessary to edit the correct price if this scenario happens, or make the deductible price for a non warrantied lens the same as the retail price. Warranty information is default loaded in the menu bar under "System". Type in appropiate information that will automatically appear in th client files. It can be edited in the client file to suit.
Contact Lens Warranty (Report)	Use this function to make a list of all your active and inactive policies. The inactive policyies list would be ideal to phone call for renewal.

Contact Lens Warranty Information	Warranty information is default loaded in the menu bar under "Open". Type in appropiate information that will automatically appear in th client files. It can be edited in the client file to suit.
Contact Lens Warranty Recall	You can choose between using the standard label for renewal and or using letter for window envelopes and sending a personalized letter. Use the preview button to examine before printing. Use "Report Archive" to view the last time any of these procedures were taken.
Contacts (client Information)	Using the insert R or insert L button, you may access the inventory to transport items into the file after pushing the Add button. You may also put an individual order in by filling the boxes although it will not automatically update the invoice. Automatic invoice update occurs only form insert from inventory. Pushing the print button will allow sending the order to printer or faxing to supplier. Use the Send Email button for electronic mail. You must have Outlook Express as your default mail client. You can use the drop shipment tool on the client contact lens order form to order contact lenses from the supplier and have them shipped directly to the client. To enable this function you have to begin with the supplier phone book and enable the feature. Add in the cost of the shipping under the "Control" field and the reatail price. When you fill the contact lens order on the client screen check the Drop Ship to Enable. This will cause an additional charge to the billing for the actual amount of the courier along with your other fees. You enable or unable this feature as you like. Add the desired shipping information by iserting information from the client main screen or type in all new information. Click print or send email when finished. This tool does not function under the bulk client orders and must be processed as the come. The reference number for follow must be used for confirmation.
Contains	"Contains" is a serach expression. Search for records that contain a certain character set.
Contains (Inventory)	Contains - is a special tool on the grid list for searching for items by description, type the characters found in the descriptions and a search will limit the results to that criteria. This tool is available on all inventories. On the "Insert Inventory" button on eyeglass and contact lens client files, you have the added option of selecting by lens type, sphere and cylinder. For instance, you can check which powers are in stock from which manufacturers.
Control	Control is the wholesale cost of the items. It is located on the inventory screens and on the invoice on the right scroll of description and refers to unit price.
Cost Of Goods Sold	You can activate level security to enable this form under "Password Control". Accounting - Sales Journals Sales- create logs by day or between dates. Payments - creates payment logs by day or between dates with method of payment journal. Cost of Goods Sold - report the cost of goods sold by day or between dates. *Note the "control" which equals the wholesale cost amount must be filled in the inventories, or if the invoice is custom, must have "control" inputed seperately on the invoice screen. Cost of Goods Sold by Invoice- report the cost of goods sold by invoice byday or between dates. Staff sales- creates logs of individual staff sales, enter by day or between dates. Use staff sales to calculate staff production or commissions etc. All reports are itemised per location. Create inventory tags to track groups of inventory items sold. Type the default values into the tag default grid and they will be available with the drop down combo box on the inventory screens. The tags will

	become a part of the cost of goods sold report.
Count Inventory	To check / count your inventories go to the modify inventory, and select inventory of your choice. Click on the count inventory tab to begin. Begin by selecting the inventory items to be counted and checked. You have the option of checking all locations, checking a single location, checking location and supplier and by "contains" field. The "contains" field allows you to search phrases from within the item description. In order for the inventory check to function, you must check all the inventory within your given selection parameters. Push the reset button to change the check quantity and checked date to zero. Click on the scan button, and began scanning or typing in the item numbers from the selection. Each time you select an item and additional single item will be added to the checked inventory. Once all items from the selection have been scanned, you may preview or print a report that will display any and all discrepancies from a list. It also calculates the wholesale value differences. At any given time, you may edit the grid to effect a change. If your results seem to be correct, you may now update the list from your inventory to reflect the checked inventory. It is important to recognize, that once the update button has been used that there is no restore. It would be a good idea for you to create a backup prior to utilizing this tool.
Count Inventory Only	Use this tool to allow lower level security access staff to count inventory without giving them access to all inventory tools .
Count Inventory Stock	Use the new tool for low-level security access staff to count inventory without any inventory edit access. Begin by clicking the "Reset" button to set the counts and dates to zero. Click on scan and begin barcode scanning all products. You may select criteria for your count. For instance, you may choose which store or which supplier you want to do the count for. Select view or print on report.
Credit Card Default	Type in the type of credit cards that you use under "System" and "Default Values" on the menu bar. When you make payments on a file they will be made available in the method box.
Credit Card Find	On Client Address, use the Find button to locate credit card holders.
Credit Card Number Magnify	Use the arrow control next to the client credit card number to enlarge by groups of four. This allows easy reading for manual terminal input of credit card numbers. Remember to close the magnifier after use.
Currency Symbol	You may set your country currency symbol in business information. Whatever you choose will become the default for all forms. Place the symbol on each location page.
Cut Copy Paste And Clear	Right click with your mouse on any active field and use this functions to: Cut - Clears entry and saves it to clipboard. Copy - Copies highlight field to clipboard. Paste - Writes field from clipboard to new field with focus. Clear - Removes field and does not affect clipboard.
Data Maintenance	Under the master marketing list, there is a tab called "Data Maintenance". Use the tools on this page to clean data under the client information fields. For instance, you can check to see if there are misspellings of a city. You can group them together and then replace the field with the proper spelling.

Data Mining	Data mining is a term to describe the ability to earn profits from the databases that you create. More important it allows cost effective mail merge advertising by targeting specific customer needs and buying habits. This edition of software also comes with e mail tools. See e mail for more information.
Date Format	Date function in OPTIZONE is year 2000 compliant. The format is Month/Day/Year for example 12/31/1998. All four numbers must be used for the year.
Default Inputs	Default inputs: Default inputs are words that are used repetitively in Optizone. This section must be reviewed/completed as part of the initial set-up of Optizone. Many of the other functions within this program will not operate without proper review/completion of this section. The client address fields automatically load but can be edited. Default Values on System on the menu bar: · Address Input · Contact Lens Solutions · Contact Lens Warranty · Exam Input · Inventory Tags · Letter Library · Payment Methods · Rx Types · Invoice Types
Define Direct Mail	Define Direct Mail Is used to create mailing lists that are attenuated to the type of data or services that the patient has required in the past. Use this tool to create mailing lists for advertising or information purposes. For example- If a new daily contact lens comes available, you can search everyone who wears a standard disposable and send them a letter telling them about the new product. If you use preview on these items you will also be able to see a count of records generated on the preview menu bar. You can also define mail on the master lists, see those areas for deatails.
Delete Barcodes	"Delete Barcodes from record for reuse." This tool is available under frames inventory on the fourth tab. Use this tool to reuse barcode tags for new incoming frame stock.
Delete Inventory	You have the option to permanently delete inventory from your database. You can activate level security to to enable the delete button under "Password Control". The delete button is available on the "Add Items" screen and the "Search / Edit List / Reports" screen on the inventory modules.
Demo Passkey	When using a demonstrator program to evaluate, type DEMO into the opening box to activate and use as your passkey / password.
Detailed Inventory By Date Of Entry	Use this report tool to see what updates to your inventory have been done in any given time frame. See what stock has not moved from your shelves. Select which inventory you desire to see, select if you want a date restriction, choose detailed or summary report and select output to view or print.
Diopter Radius Conversion	Use the calculator located on the eyeglass and contact lens pages.

To convert diopters into radius of curvature, type in the diopter power and push "Calculate R". To convert radius of curvature into diopters , type in the radius in mm and push "Calculate D".

To use the vertex distance conversion tool, type in the power, select the vertex distance that the power was examined at, select the new vertex distance, and push "Calculate P". For contact lens power, the new vertex distance is zero. Vertex distance 13.5 is only the default vertex distance and can be changed as required.

To use the manifest over refraction (MOR) tool, type in the current prescription of the client, add the MOR and click "Calculate M". Use the transpose button as required.

Disclaimer of Liability - EZ-Zone Software Ltd. does not warrant or assume any legal liability or responsibility for the accuracy, completeness, or usefulness of any information generated from the use of this product.

Discounts For Invoice Sales

Use the Add Discount button; choose from percent or dollar amount for quick tabulation. Discount percentage is calculated from invoice total. Input dollar amount or percentage amount into the text box and push add discount. You may choose to do a line item discount or an invoice total discount for percentages. Negative amount for dollar discount is not required.

Discounts for invoice sales can be inventoried in the miscellaneous inventory as well. Negative amount for dollar discount is required. For example:

Discount Eyeglass Coupon $-25.00

They can be added to the sale by using the Insert Misc button on the invoice form. This discounts will be tabulated on all the accounting and inventory reports.

Discounts can be calculated on the total invoice using the discount tool on the invoice. Select dollar amount or percentage as desired.

Doctor Directory

Put your Doctor List in the doctor phone directory. This will allow you to access it in the other areas such as eyeglass prescription. For exam reports you can access the "report to" function under default exam reports.

Doctor Referals

On the menu bar under Accounting reports, push practise analysis. You can activate level security to enable this form under "Password Control". Select doctor and dates and press view or print.

Doctor Sale Tracking

Optizone readily tracks salesman sales. Many practices now include doctor owners who wish to track sales from their prescriptions.

Find this tool on the main menu bar under Accounting Reports. Use this tool to track doctor sales on invoice.

To activate, the doctor's name or clinic must be in the doctor phone book. The doctor's name can then be inputted onto the client address screen, which will be the default on invoice or the doctors name can be changed on the invoice as well.

Doctor, store location and date subjugate report selection.

Doctors List

Make a list to solicit doctors using the tool in mailing lists. You have a choice between label, letter or phone list.

Drop Down Combo Boxes

When using a drop down combo box, after clicking on one, you may type the first letter of the item you are looking for. Incremental search function will continue in sequence. You may not write to combo box. Values for the combos will have to be written in the default value forms. ie. phone book, default values.

Drop Shipment Contact Lenses	You can use the drop shipment tool on the client contact lens order form to order contact lenses from the supplier and have them shipped directly to the client. To enable this function you have to begin with the supplier phone book and enable the feature. Add in the cost of the shipping under the "Control" field and the retail price. When you fill the contact lens order on the client screen check the Drop Ship to Enable. This will cause an additional charge to the billing for the actual amount of the courier along with your other fees. You enable or unable this feature, as you like. Add the desired shipping information by inserting information from the client main screen or type in all new information. Click print or send email when finished. This tool does not function under the bulk client orders and must be processed as the come. The reference number for follow must be used for confirmation.
E Marketing	E-mail tools are available in several locations. On the client file, "Communications", you can send e mail to this client. Under "E Marketing", you have a choice of sending e mail on client tag, since last purchase, send all clients or send between client numbers of choice. Start your selection with "Select 1" and work down the list. The counter will tell you how many files you have selected. If someone wishes to be removed from the e mail list, you can click the send no e mail check box on the client address file. They will automatically be checked off if the e mail address has not been inputted on the client file. To use the e mail tool, Outlook Express must be your default mail client. Using your Internet Explorer browser select Internet options, programs, mail server and select Outlook Express. Otherwise the mail tools may not function properly. Always be polite when sending mass emails to your clients. Below are some regulations to follow when accessing the internet. Always check with your internet provider for any special guidlines that you may have to follow. See "E Mail Throttle Tool" for more info. INTERNET E-MAIL RULES 1. Harassment, whether through language, frequency or size of messages, is prohibited. 2. Users may not send e-mail to any person or entity that does not wish to receive it. If a recipient asks to stop receiving E-mail, the user must stop sending that person or entity any more e-mail. 3. Users are EXPLICITLY PROHIBITED from sending unsolicited "bulk" messages "junk mail" or "spam"). This includes bulk-mailing of commercial advertising, informational and political announcements. Such material may only be sent to those who have explicitly requested it. 4. Users may not forward or otherwise propagate chain letters. 5. Malicious e-mail, including "mail bombing", is prohibited. 6. Falsification of user information provided to COMPANY, its agents, or to other users of the service, in connection with use of a COMPANY service is prohibited. 7. COMPANY accounts and services may not be used to collect replies to messages sent from another service provider, where the messages violate this AUP or the AUP of the other provider. 8. Posting ten (10) or more messages similar in content to mailing lists or persons is prohibited. 9. Users may not send unsolicited e-mailings to more than twenty-five (25) e-mail users, if such unsolicited e-mailings could reasonably be expected to provoke complaints. 10.To engage in any of the foregoing activities using the service of another provider, but channeling such activities through a COMPANY account, a.k.a. re-mailing, or otherwise through a COMPANY service or using a COMPANY account as a mail-drop for responses or otherwise using the services of another provider for the purpose of facilitating the foregoing activities if such use of another party's

	service could reasonably be expected to adversely affect a COMPANY service.
E-mail A Single Client	Find the client you wish to e-mail using the find tool under client address. Make sure that he/she has an e-mail address. Go to the communications tab and create or get a letter from the letter library. Add a file attachment to the form as required. Click send e-mail when completed.
E-mail Contact Lens And Eyeglass Orders	On the client screen, you may order contact lenses, eyeglass lenses and frames. Fill in the information required, select the report needed and push "Send E-mail". The e-mail info in the supplier directory has to be filled in with the order desk e-mail information. To use the e mail tool, Outlook Express must be your default mail client. Using your Internet Explorer browser and select Internet options, programs, mail server and select Outlook Express as your default mail program. You will have to go into security in the mail tools to "Allow other programs to email". Otherwise the mail tools will not function properly.
E-mail Logs	All letters printed or e mailed will be logged on the mail logs. It is also available on the client address form.
E-mail Master List	The e-mail mail master list is capable of creating a complete list of client active files. You may also define the list with the tools included. Specify parameters and click the Select Button. You can activate level security to enable this form under "Password Control".
E-mail Send Errors	You have to have permission from your Internet Sevice Provider (ISP) to be able serve e-mail from this program. Most ISP will automatically allow e-mail to be sent. Some ISP will run filters to avoid spammers to utilize their mail box. In the event that you receive an error message from your ISP server, contact their office to include your mail serving.
E-mail Sending (Set Up)	EZ-Zone Software has a built email communication tool. You can create a letter for a client under the communication tool under client information. Push "Add" to create a new letter. You may use the letter library to use a letter from archive. You will require "Administrator" log on to access the library. To send e-mail, the e-mail field must be typed in on the client information screen. To set-up the e-mail list server: If you do not have Internet Explorer and Outlook Express on your computer, they are available at Microsoft.com at no charge. You will have to have them loaded on your computer for this tool to operate. A. Outlook Express must be your default mail client. Using your Internet Explorer browser: 1. Select tools 2. Select Internet options 3. Select programs 4. Under Internet programs, e-mail, select Outlook Express B. Your mail security needs to be adjusted. Using your Outlook Express browser: 1. Select tools 2. Select options 3. Select security 4. Click off the checkbox - "Warn me when other applications try to send mail as me." * If you have other security tools such as Norton or Zone Alarm, they should prompt you when you use the e-mail tool to allow the EZ-Zone Software to become a mail server. Using EZ-Zone Software with "Administrator" access:

Go to marketing, e-mail marketing, make e-mail list. Start your selection with "Select 1" and work down the list. The counter will tell you how many files you have selected. On tab 2, create letter, add a file attachment as required. On tab 3, process the list, add your staff number, select if you do not want to add the letters to the client file and click e-mail.

If someone wishes to be removed from the e-mail list, you can click the send no e mail check box on the client address file. They will automatically be checked off if the e-mail address has not been inputted on the client file.

Always be polite when sending mass emails to your clients. Below are some regulations to follow when accessing the Internet. Always check with your Internet provider for any special guidelines that you may have to follow.

Graphic color e-mail messages can be sent with this tool. You have to build a .htm file with pictures hyperlinked from a web server. If you do not have much experience with web page editing, you may have to consult your web master. Once you have the file prepared, add the file as an attachment. Do not include any text in the letter text. Have all your text within the .htm file. When it is sent, the receiving client will have full graphics and text downloaded to their view.

See "E Mail Throttle Tool" for e-mail server speed info.

INTERNET E-MAIL RULES

1. Harassment, whether through language, frequency or size of messages, is prohibited.
2. Users may not send e-mail to any person or entity that does not wish to receive it. If a recipient asks to stop receiving E-mail, the user must stop sending that person or entity any more e-mail.
3. Users are EXPLICITLY PROHIBITED from sending unsolicited "bulk" messages "junk mail" or "spam"). This includes bulk-mailing of commercial advertising, informational and political announcements. Such material may only be sent to those who have explicitly requested it.
4. Users may not forward or otherwise propagate chain letters.
5. Malicious e-mail, including "mail bombing", is prohibited.
6. Falsification of user information provided to COMPANY, its agents, or to other users of the service, in connection with use of a COMPANY service is prohibited.
7. COMPANY accounts and services may not be used to collect replies to messages sent from another service provider, where the messages violate this AUP or the AUP of the other provider.
8. Posting ten (10) or more messages similar in content to mailing lists or persons is prohibited.
9. Users may not send unsolicited e-mailings to more than twenty-five (25) e-mail users, if such unsolicited e-mailings could reasonably be expected to provoke complaints.
10.To engage in any of the foregoing activities using the service of another provider, but channeling such activities through a COMPANY account, a.k.a. re-mailing, or otherwise through a COMPANY service or using a COMPANY account as a mail-drop for responses or otherwise using the services of another provider for the purpose of facilitating the foregoing activities if such use of another party's service could reasonably be expected to adversely affect a COMPANY service.

Error Handling On Prescriptions

Optizone has messages that show upon missing information on the eyeglass and contact lens order forms. For instance, if you write an Rx and forget the PD, a message will pop up to remind you. On another mouse click the message will go away.

Error Messages

If you are getting a lot of error messages using the program, some of the following events may be happening:
You are hitting buttons to quickly, a faster computer will help to alleviate this problem.
There may be too many screens open at the same time.
If there is a lot error messages after a print function, you may have to reload the print driver(s).
The network pathways may not be set up properly.
If an error message does occur, close the program and reopen. Information that you have entered will normally be saved up to the file that you are working on.
If your system is slowing down you may need to defragment your hard drive, speak to your hardware administrator if you need assisstance.

Exam (client Information)	This module makes easy consultation reports. Fill in the information with the combo box defaults and press print. Also all exam fees are located under the fee section which are preloaded in inventory. Report to- for example is the doctor whom you may want to send the consultation report to. The remaining items can be loaded in the default exam file in order to load from the drop down combo boxes or you can use exam templates to populate the fields. Select from the combo box which exam you desire, provided you have more than one exam that you use. You have the choice to print out a exam referral or an exam record for the doctor to write his notes on or print All Records.
Exam Input Data	Use this module to create defaults for patient exam forms. It is accessible from the exam screen under add item as well as in the menu under file.
Exam Record	Under "Exam" on the client information screen, you may choose to print or e-mail or you can also print out an exam record template for the examiner. You can use the magnify button to open a full page edit box for more lengthy note taking.
Exam Template	Use the exam templates to populate the client information screen with exam specifications that you commonly use.
Excel Spreadsheets	To export inventory database files to an Excel spreadsheet, use the export data under inventory navigation. Excel is limited to 64,000 records in most instances. Use the Marketing Tool to create list that are beneath this limit and make multiple lists if your database is bigger. To export client files and phone directories to an Excel spreadsheet, use the export data under main navigation. *You must have Excel installed on your system for this tool to function. **Excel is a registered trademark of Microsoft Corporation.
Exit	Exit button is located under file in the menu. Exit will close Optizone program. Close screen buttons operate under standard window function by pushing the X in the upper right hand of the form or pushing close on the button pad. If you are using "Staff Log On" you may log out a staff member under the "Exit" command in the main menu bar. You may then log on a different staff member as required.
Export Data	To export inventory database files to an Excel spreadsheet, use the export data under inventory navigation. To export client files and phone directories to an Excel spreadsheet, use the export data under main navigation. *You must have Excel installed on your system for this tool to function. **Excel is a registered trademark of Microsoft Corporation.
Eyeglass Client Orders	After selecting a client on the client information screen by adding a new one or "Find"ing a previous client. Select "Rx Glasses" on the client information screen: click on "add" to start the cursor moving through the order form as you fill in the information as required. When all the information has been entered you have the choice of sending the order via fax modem or you can print a copy for delivery. This file becomes a permanent copy of the named client's file. The purchase order number will generate automatically. Click on "insert" when taken from inventory it will automatically fill the invoice. Remember when inserting lenses from inventory it will overwrite the prescription if labeled, so be sure to add the prescriptions after the lenses are inserted. You may place doctor information in at this time using the combo box. Add new doctor to list as required. Use the job status button for lab work. Push the lab work button to access lab info.

Eyeglass Order Confirmation	Use the order confirmation grid for eyeglass and contact lens orders. You can check and track whether your supplier has received a contact lens or eyeglass order that was mailed or faxed from the client record. Check off the confirmed button on the client file or hit the edit button on the order grid and add a reference or tray number.
Eyeglass Work Order	The eyeglass job status is for the laboratory use and manufacture of the glasses. Install tray number and lens blank specifications from frame measurements. Click on the appropriate status buttons and/or add specific notes to the job.
Fax Reports /Orders	In order to fax reports or stock orders, press the"print" button on the desired screen. The fax driver must be set up as a print driver on your system for this to function. When the print button is pressed, select the fax printer and type the fax phone number or used the fax phone book to select.
File Manager	Use the Graphics & Files page on client information to hold picture and files relating to your clients. You can store photographs, prescription, PDF files, Word docs etc. Picture formats include: bmp, gif, jpg, png and tif. Use the "Open File" button to open the file with your operating system reader. Print, view or email results as required.
File Share And Lock	When someone has a file in the edit mode, no one else may open that file until the edit has been saved. Data integrity is protected in this manner. Likewise, it is prudent to close a file as soon as you are done so that someone else may access the file.
Find (client)	Under Address on the client form, push the find button. Under list you can set the order to name, firstname, or email by pushing the header and then push OK.
Graphics & Files	Use the Graphics & Files page on client information to hold picture and files relating to your clients. You can store photographs, prescription, PDF files, Word docs etc. Picture formats include: bmp, gif, jpg, png and tif. Use the "Open File" button to open the file with your operating system reader. Print, view or email results as required.
Hardware	Computer specifications - Minimum specifications 1. 2.0 GHz CPU 2. 512 MB Ram 3. 80 GB hard drive 4. Keyboard, mouse (optical mouse controls work the best) 5. Color monitor - screen resolution 800 x 600 6. Ethernet network card (on network for multiple users) 7. 56 K fax modem (for inventory ordering and report sending) 8. For data serving, use UPS (universal power supply - 20 minute battery back up) 9. Laser or bubble-jet printer (for printing standard reports) 10. Ethernet hub and wire to attach other computers 11. Internet account with a mail account to use e-mail tools 12. 2nd printer port (for label printing - optional) 13. Tractor feed printer (for labels - optional) BACK UP - VERY IMPORTANT; Use one of the following: CD-Rom read-write USB Memory stick Zip Drive 100 Mb

Tape back up
External hard drive

EZ-Zone Software builds professional use database software systems. Approved operating systems are Windows NT, 2000, XP, Vista And Server by Microsoft. Use of other systems may affect the stability of your database and could result in database corruptions.

Insert (button)

Use the insert button to transport from inventory items to add to your screen. Load items to be inserted into inventory screens prior to using the Insert buttons. Automatic invoice update will happen when you push the add button on the invoice screen.

Insurance Bill Tracking

Track insured claims on client screen by using the Bill Insurance Provider tool. Type in their client card number, use the combo box to insert the insurance provider and include their claim authorization. All of these fields can be edited on the bill to reflect changes. Click on print insurance bill for invoice. Use Bill Insurance provider to track specific provider claim amounts and account receivable. Click off when the claim is paid by insurance company to remove from account receivable of insurance providers.

Sales accounting for insurance providers:

Track your insurance provider sales using the tool located under "Accounting Reports". You can activate level security to enable this form under "Password Control". You may select by store location and date range. View or print report as desired.

International Currency

Optizone Enterprise can use different currency sybols. Go to Business Information and type in which currency symbol you need to use. The default is dollar $.

Inventory

Individual inventories are highly specialized; select the appropriate inventory module to be modified. Enter the store location if you have more than one. This will assure that inventory on hand shows at the proper location.

After installing your inventory, access to the inventory is achieved by clicking the "Insert" inventory buttons found on the client file. These buttons will automatically remove from inventory the quantities added to the client file.

INVENTORY FORM

Screen One - Add Items:

Product Number - The computer generated number for this item.

Add To File - This is the default number of items typically added to the client file when purchased. For instance, clients normally only buy one frame, therefore the "Add To File" value is one. The default value is one.

Model / Type - Install the item description.

"Item Descriptions" - Each inventory has special descriptors, fill them in as required.

Deductible (Contact Lens Inventory Only) - Install the contact lens warranty price here.

Charge A Tax / Charge B Tax - If items are taxable in your area, you can set the tax percentages in "Business Information" and default them in the inventory.

Date MM//DD/YYYY- This date specifies the date of record creation.

Barcode - Install UPC numbers that came with your product or you can use the product number as a unique number to barcode your products. Bar-coding your product will facilitate inventory control.

Quick Code - The quick code can be used to find items in inventory. The quick code is typically an easy to remember code that can be used for repeat items.

Supply Code - This field can be used for the invoice number that the product was purchased from the supplier. Otherwise, you may use it as a reference however you like.

Control - Control is the wholesale cost of the item. In the event that a client is watching your screen, it adds some privacy.

Retail Price - Your sell price.

Quantity in Stock - The amount in stock of these items. This is updated automatically when "Inserting" items from inventory into the client file.

Quantity Sold - The amount sold of this item. This is updated automatically when "Inserting" items from inventory into the client file.

Reorder Level - The minimum quantity of stock you wish to keep of this item. When ordering stock, it will reference this number against the quantity is stock to build a purchase order.

Pick Tag / Department - Use tags to track, count and control your inventory. Tags are helpful when dealing with items that are different from other items although kept in the same inventory.

Pick Location - If you have more than one store / location, you will need to input that location number here. Location numbers are generated in "Business Information".

Pick Supplier - Install your suppliers in the supplier directory first and input them with your stock items by using the combo box.

Parameters Available - For the eyeglass lens and contact lens prescriptions, you can define what powers the product is available in for future reference.

Screen Two - Search / Edit List / Reports:

You can search through the list to select any item you desire using multiple parameters. Highlight the selected item and return to page one to edit or edit on the grid.

You can view on inventory lists by filtering by location, department tag, supplier and contains. Contains - is a special tool for searching for items by description, type the characters found in the descriptions and a search will limit the results to that criteria.

Make "Edits" and "Save" to the grid as required. You must go to screen one to add new items. "Close" to exit the inventory.

Specialized inventory reports are available by parameters selected. Select summary or detailed report. Make a summary report for all specialized inventory for year-end tax accounting in the inventory reports section.

Screen Three - Take Inventory Count:

Barcode scanning of inventory items is available on all inventories.

To check / count your inventories go to the modify inventory, and select inventory of your choice. Click on the count inventory tab to begin.

Begin by selecting the parameters of inventory items to be counted and checked. You have the option of checking all locations, checking a single location, checking location and supplier and by "contains" field. The "contains" field allows you to search phrases from within the item description. In order for the

	inventory check to function, you must check all the inventory within your given selection parameters. This means that only inventory within the selected parameters will be checked. If you select an item outside of the parameters, a buzzer will sound and the message " Item not found etc." will display. Push the reset button to change the check quantity and checked date to zero. Click on the scan button, and began scanning or typing in the item numbers from the selection. Each time you scan a selected item, one additional single item will be added to the checked inventory. Once all items from the selection have been scanned, you may preview or print a report that will display any and all discrepancies from a list. It also calculates the wholesale value differences. At any given time, you may edit the grid to effect a change. If your results seem to be correct, you may now update the list from your inventory to reflect the checked inventory. It is important to recognize, that once the update button has been used that there is no restore. It would be a good idea for you to create a backup prior to utilizing this tool. Barcode scanner -you may utilize a wedge type barcode scanner that connects between your keyboard and your computer. These are inexpensive and easy to use. You could buy a cord long enough to reach your entire inventory from a computer station. Make sure that's the audio is turned up high enough on your computer so that you can you can hear the beep when the product you scanned has registered. Alternatively, there are also wireless scanners available to perform this task. You will have to speak to your hardware representative to have the scanner installed correctly. Screen Four - Add To / Remove From Inventory: Use this screen to add and subtract inventory already installed with a barcode scanner. Select adding or subtracting and begin scanning the product. A report reference can be made to facilitate return of product on making and printing a report.
Inventory (reorder)	Use this module to order inventory lower than the minimum quantity levels on the inventory screen. Select stock, supplier and purchaser and push print to printer or fax. The minimum quantity on the inventory screens has to be higher than the quantities in stock to activate. This function creates the purchase order for faxing or printing.
Inventory - Advanced Search	You can search by tag / supplier and by item "contains" search word. Select the supplier and then type item you are looking for.
Inventory - Inserted, Not Invoiced	Under "Inventory Waiting But Not Inserted" you can track items "Inserted" onto client files from the inventory without an invoice being added or edited. These items will stay pending until the client file that ordered the inventory either has an invoice added or edited. You may want to purge this file for cleanup and check the invenory quantity of the items on the list. This tool is for error handling. Staff should process the invoices immediately following insertion of items from inventory.
Inventory Best Sellers	Under report options for inventory, you may select "Inventory Best Sellers". Use this report to see what quantities of each product you sell. This tool functions under the name/description of the invoice items that you sold. If you are using generic names for different barcodes, the barcode field will not be accurate and perhaps nor would the pricing information etc. This tool is particularly useful for viewing which frames are selling the best. You should use the frame name and number under description to track this properly.
Inventory Delete Button	You can activate level security to enable the delete button under "Password Control". This adds to the protection of your stock.
Inventory Duplication For Multiple Locations	This tool is for duplicating inventories for license installations with multiple stores. Your other stores must be installed first for this tool to activate. Create your initial database for store one and use this tool to expand a copy of the inventory to other store numbers. Delete inventories from other stores first.

Always back up your program before using a tool like this.

Inventory Order (From Client File)	Bulk orders of inventory - contact lenses, eyeglass lenses and or eyeglass frames. Bulk orders of inventory that were not available from stock can be ordered from the client files. For instance, if a client had a frame ordered on his eyeglass file, the days order can be generated and subjugated by supplier and business location. At the end of day, all the frames required could be ordered by individual suppliers by fax or e-mail. Certain requirements have to be made to achieve this. 1. The client has to have an order for contact lenses, eyeglass lenses and or eyeglass frames created on their file. 2. The "Ordered" check button must be off. 3. The model or type field must not be empty. 4. Supplier name and account should be filled in for faxing to supplier. *But not required if phoning the orders to the supplier. To use the tool, go to the inventory menu and select "Order Inventory", select "From Client File" and choose department. i.e. contacts, glasses. Use the 1-2-3 order description tools to create the desired list. Print to fax or e-mail and send. When completed, use the "Update" button to mark the product ordered on the client file. The products will not show on this list again unless the "Ordered" button is clicked off.
Inventory Pricing	You can set the inventory price in relation to the wholesale price located on the initial inventory entry screen. On the second tab you can select a specific data set of inventory and apply a pricing structure en mass.
Inventory Reports	Select which report you desire and choose functions as required. Inventory reports are all located in the inventory menu and on the inventory modules page two. Inventory reports will give information from the first time the schedule was created. Use the supplier drop-down combo box to select from an individual supplier or select all suppliers for year end reports. If reports are required by chronology of items sold, use cost of goods sold under sales accounting in the menu bar under reports. The frame inventory can also produce an inventory list by store location. Under inventory security, you can track items "Inserted" onto client files without a invoice being generated. These items can be corrected by generating an invoice under that client file for manager correction and control. Inventory is dynamic and changing daily. For accounting issues with inventory, plan to do inventory counts on the days required. For instance, if your year end falls on December 31, plan to do a count on or near that date.
Inventory Returns / Adjustments	Inventory returns / adjustments can be done easily. Go to the inventory navigate screen and select inventory to modify. Use the "Add To / Remove From Inventory" tab to begin. Select location to modify. Either select "Add To" or "Remove From" inventory and begin scanning items. You may type the barcode as well. Give your adjustment a "Reference" subject or number. View / print reports by pushing the "Reports" button.

	On the reports screen, select the supplier and date for the report. Delete any particular record if you need by highlighting the selected record and push the delete button. View / print a detailed or summary report as required. Use this report tool for your product returns and to double check recent entries of new inventory scanned on the "Add To" or "Remove From" inventory tool.
Inventory Tag	Create inventory tags to track groups of items sold, for instance sunglasses discontinued stock etc. Type the default values into the tag default grid and they will be available with the drop down combo box on the inventory screens. The tags will become a part of the cost of goods sold report.
Inventory Type Sold Analysis	Go to Practise Analysis under Accounting Reports in the menu bar. The inventory type sold module will display what type of inventory has been sold in a give time frame. With this information, you can see what inventory is moving the best. You can also tag invoices for special purposes. THe combo box is located in the upper left hand corner of the billing screen. If nothing is entered, it will say "Standard". Perhaps you want to track a new advertising method to check productivity. Use this tool for many purposes: Remakes, refunds, Doctor Redo, Write Offs etc.
Inventory Waiting For Invoice Insertion	When an item is taken from inventory and inserted to a client file, the item is pending to be added to the next invoice added or edited. This is the auto transport mechanism employed by this software. If an invoice is not generated and an item is pending, you will need to clean these items out of the pending file. Use the "Inventory Waiting For Invoice Insertion" tool to view the items and then use the "Delete All" button to remove them. You may want to check if these items have affected your inventory stock levels. Find this tool in "Password Control" under Advanced Tools.
Invoice (client Information)	The invoice is self generating if the items put on client file are inserted from inventory. Pushing add item can make a special invoice if required. Miscellaneous inventory is available on the invoice form. Use the payment button and the method of payment box to complete the transaction. If using the add item button, put the wholesale price under the "control" column so that the report sales analysis- for cost of goods sold report will work properly. Use the prev bal button to view outstandings on this particular client. Push the tax buttons as applicable. The miscellaneous inventory holds all taxable items. Click the appropriate tax buttons. All final tax allocations are attenuated to the location where the tax was collected. When importing from the Misc Inventory using the Insert button, the tax component will transport with the item. Further use of the taxation buttons can be turned off or on as required. Discounts for invoice sales can be inventoried in the miscellaneous inventory. For example: Discount Eyeglass Coupon $-25.00 They can be added to the sale by using the insert button on the invoice form. This discounts will be tabulated on all the accounting and inventory reports. Discounts can be caculated on the total invoice using the discount tool on the invoice. Select dollar amount or percentage as desired. Track insured claims on client screen by using the Bill Insurance Provider tool. Type in their client card number, use the combo box to insert the insurance provider and include their claim authorization. All of these fields can be edited on the bill to reflect changes. Click on print insurance bill for invoice. Use Bill Insurance provider to track specific provider claims and account receivable.

	You can activate level security to enable this form under "Password Control". Under "Password Control", you can track items "Inserted" onto client files without a invoice being generated. These items can be corrected by generating an invoice under that client file for manager correction and control. You can tag invoices for special purposes. THe combo box is located in the upper left hand corner of the billing screen. If nothing is entered, it will say "Standard". Perhaps you want to track a new advertising method to check productivity. Use this tool for many purposes: Remakes, refunds, Doctor Redo, Write Offs etc.
Invoice Banner	You may add a banner to the bottom of the invoice with your special message. Input for this information is tracked under Business Information. You have a choice of putting different messages- one for the regular invoice and one for the insurance invoice.
Invoice Delete Button	For security reasons, invoices that deleted, will be sent to a databse for cancelled/voided. They are removed from the client record plus all invoice items and payments are deleted if present. Items from inventory can be returned to inventory using the return to inventory module in inventory. You can turn off the invoice delete button under "Password Control" if you so choose. You can view deleted invoices under sales logs. Click on the deleted invoices button. The security log allows staff to delete an invoice with an explanation for the delete. The system administrator controls this tool access.
Invoice Memo	To add a note to all invoices, type in the "Invoice Memo" field in Business Information. This note will be on all invoices for that location.
Invoice Security	You can turn on invoice security in "Password Control" and choose which buttons are available to the staff member. You may want to lock everything tight or you may want to just lock certain items. *Note On "Grid- Invoice Items, No Edit After Save", this button allows the user create a new invoice and modify the invoice items, but once it has been saved, no further edit is allowed. If "Grid- Invoice Items, No Edit Allowed", is checked it will overide this function and allow no edits at all.
Invoice Staff #	Turn on invoice lockdown under "Password Control". The invoice staff number must be added when the employee "Adds" an invoice. It can not be edited after "Save" unless a security password is used to enable change. This security feature protects the sales commision of an employee.
Invoice Type	You can tag invoices for special purposes. THe combo box is located in the upper left hand corner of the billing screen. If nothing is entered, it will say "Standard". Perhaps you want to track a new advertising method to check productivity. Use this tool for many purposes: Remakes, refunds, Doctor Redo, Write Offs etc.
Invoices Not Shipped / Dispensed	Use this tool to generate a grid list of all invoices that have not been marked "Dispensed Staff # / Date". You can monitor the amount of invoices that have not been picked up and also the amount due on these invoices. Use the "Go To File" to navigate as you desire. You can use the "Edit Grid" function to mark them as received directly from this tool. You can change locations if you have more than one.

	If this is the first time that you are using this tool and you have a previous database where they have not been edited, you can choose to click "Mark All" and it will check them all off if you have a huge number of files. You can then check the client files that are waiting for pick ups. Set password level access as you desire under password control. Preview or print reports as desired.
Invoicing Items Pricing (show)	On the billing screen, you may select to create an invoice which does not contain the itemised pricing of each job that you sell. Push the select before print button do not show item pricing before printing.
Keyboard Shortcuts	EZ-Zone Software is designed to be keyboard-friendly. The buttons on the main dialog all have a keyboard shortcut associated with them. To active the button at any time just hold down the 'Alt' key and press the character that is underlined on the button. For instance, to "Add a Record" you can press 'Alt' and 'a' at the same time.
Lab Work Eyeglasses	Lab information for eyeglasses can be gathered on the patient file under RX Glasses. Push the Lab Work button to activate. Click on the appropiate status buttons and/or add specific notes to the job. The user-defined job tray number will show up on the eyeglass order form.
Label Printing	Standard Labels- Use Avery labels size 1 7/16 x 4 inches Reports etc. Use 8 1/2 x 11 standard paper For windows NT, you must set up a custom label form. To build label form, under my computer: Press Printers File Server Properties Create New Form Length 1.50 Inch Width 4.0 Inch Press Save Give this form a name such as "My Label" and use this as the default for the label printer For Windows - Use user defined size for labels Length 381 0.1 milimeters Width 1070 0.1 milmeters Address labels - Under mailing lists, mail master list, you can use an avery 8160 label that comes on a paper 8 1/2 X 11 for large volume labels. (30 labels per page) All other forms use standard size paper 8 1/2 X 11.
Last Purchase Between Dates	Use the marketing "Make List" tool to select clients whose last purchase had been between two selected dates. Make the first "From" date older that the "To" date. The "Last Purchase" date is generated from the last date an invoice was created for the client. This information is on the client address information screen.
Letter (Writing)	Letter library is used to create and store all of your letters. You may access a letter tool under the client address and in marketing tools.

To make a letter for a client in particular, you may use the tool under letter log on client address or:

Use the select before print tool on the client address screen, and click on letter. Push the print button. If the letter is already in the letter library, use the combo box to insert. Otherwise push the add new letter to create one. Give the letter a subject name for reference. You may type the letter as long as you like. When you are marketing a product, a brief one page letter is most effective.

Letter Library

Letter library is located on the menu bar. Select "System" and then Default Values or under Mailing Lists. Type in the body of the letter and include your closing salutation. The letter automatically generates the heading, opening salutation and date. The address is also included in a position suitable for window envelopes. Include a name for your letter such as "Contact Promo" so that you may reference that letter easily.

Logo Letterhead- Go to the business information screen. Use the logo letterhead to attach logo to letterheads. You may use one of the samples or import your own logo. Push "Get New Logo" and push add, the form will prompt you to specify the location of your logo. Your operating system will require an OLE server for this function to operate, typically *.bmp file servers come with your operating systems. You may want to speak with your graphics consultant for further information.

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All title and copyrights in and to the software product (including but not limited to any images, photographs, animations, video, audio etc.) the accompanying printed materials, and any copies of the software product are owned by EZ-ZONE Software Ltd. Copyright and international treaty provisions protect the software product. Therefore, you must treat the software product like any other copyrighted material except that you may either (A) make one copy of the software product solely for back-up or archival purposes or (B) install the software product on a single computer provided you keep the original solely for backup or archival purposes. You may not copy the printed materials accompanying the software product.

Location #

The location number of the store is logged upon opening Optizone. The number will be displayed in the main screen title to let you know that you logged to the proper location. The location information will be tagged on all new files added to the client record. It is also required to locate where inventory is. Location 1 should be assigned to head office.

If more locations are required, simply contact EZ-Zone Software Ltd. for a passkey to increase your capacity. The new passkey will have to be entered under the "License" form located in the menu bar under "System".

Location License - Expanded

After purchasing a server license, you need to open the "License" item under "System" in the menu bar.

1.Install your new license key.
2. Open business information and see that your license allocation has been expanded.
3. Push the "Add License" button to create the new locations.

These locations will now be available to add inventory etc. into. Reporting will be expanded to include theses locations. You will have the option of doing single store or multiple store reporting. It will also track sales amongst staff members between the locations.

Logo Letterhead

Logo Letterhead- Go to the business information screen. Use the logo letterhead to attach logo to letterheads. You may use one of the samples or import your own logo. Push "Get New Logo" and push add, the form will prompt you to specify the location of your logo. Your logo should be about 1 1/2 inches by 2 inches or less in size to fit properly. Your operating system will require an OLE server for this function to operate, typically *.bmp file servers come with your operating systems. You may want to speak with your graphics consultant for further information.

Mail Master List

The mail mail master list is capable of creating a complete list of client active files. You may also define the list with the tools included. Specify parameters and click the Select Button.

You can activate level security to enable this form under "Password Control".

Mail Merge	Mail merges are direct mail letter designers generated by user defined parameters in Mailing Lists. You can pick several categories under mail list in the menu bar. Pick the category of the target market that best suits the product or services that you want to promote. Mail merges automatically generate the letterhead, date and opening salutation with address for use in stuffing window envelopes. Select the letter from the combo box or edit the information you want in the letter with the closing salutation. You may use the view button to check your format before you print. To create new letters select Letter Library on the menu bar and add as many letters as you would like. Give the letter an individual name for future reference. On the mail master list, you have the option of using avery 8160 labels, which come in three rows of ten on a 8 1/2 x 11 sheet. Use these labels for high volume sending of brochures etc.
Mailing And Emailing List	Use the "Marketing" tool "Make List" to create and process client data lists. You can make the following: 1. E-mail broadcast lists 2. Labels for postcards 3. Telephone marketing lists 4. Letters with addresses 5. Complete client lists Use the "Make List" tools to extract the data set that you require. There are numerous permeations to receive the results that you require. Definitions: Add client files - append files to the current data collective. Remove - delete files from the current collective. Limit - remove all clients who do not meet the selected criteria. Contains - the field selected is within the subset of the field being searched. Start with all data records [Show All] and subtract or limit client records from collective, or start with no records [Show None] and add selected records You may also do a little of both. *Take note: adding records with one parameter may be removed by using another parameter. Experimenting with parameters can create many different combinations. Try to make your data query simple for best results. Click the reset button to start the process from new. See Printer set-up for more information.
Make Odbc Connection	ODBC - Open Database Connectivity is the tool that connects the Optizone database to the Internet web-site submissions database. Optizone uses Mysql driver 3.51 to make the connection. The web-site database connectivity tool can be ordered from EZ-Zone Software Ltd.
Manifest Over Refraction	Use the calculator located on the eyeglass and contact lens pages. To convert diopters into radius of curvature, type in the diopter power and push "Calculate R". To convert radius of curvature into diopters , type in the radius in mm and push "Calculate D". To use the vertex distance conversion tool, type in the power, select the vertex distance that the power was examined at, select the new vertex distance, and push "Calculate P". For contact lens power, the new vertex distance is zero. Vertex distance 13.5 is only the default vertex distance and can be changed as required.

	To use the manifest over refraction (MOR) tool, type in the current prescription of the client, add the MOR and click "Calculate M". Use the transpose button as required. Disclaimer of Liability - EZ-Zone Software Ltd. does not warrant or assume any legal liability or responsibility for the accuracy, completeness, or usefulness of any information generated from the use of this product.
Marketing List	Use the "Make Marketing List" tool under "Mailing Lists" to create list defined by the parameters you select. Output is: 1 1/2 by 4 Inch Tractor Feed Labels Avery 8160 Address Labels Email Letters Excel spreadsheet Dear "John" Letters Telephone Lists
Message Board	Use the message board function to log client calls or use it to trade messages between locations. Type your return message into the lower message box. The message is automatically logged from which location that it originated.
Miscellaneous (inventory)	Miscellaneous items, such as solutions and halfeyes, can be added directly to the invoice by pushing the insert button. The Miscellaneous inventory can also used to add discounts to sales. Discounts for invoice sales can be inventoried in the miscellaneous inventory. For example: Discount Eyeglass Coupon $-25.00 They can be added to the sale by using the insert button on the invoice form. This discounts will be tabulated on all the accounting and inventory reports. The miscellaneous inventory holds all taxable items. Click the appropriate tax buttons. All final tax allocations are attenuated to the location where the tax was collected. When importing from the Misc Inventory using the Insert button, the tax component will transport with the item. Further use of the taxation buttons can be turned off or on as required.
Modify Inventory	Use modify inventory to make changes to inventory. Select the inventory module required and use the grid tab to select product to be modified or use the find button. For example: If a patient is exchanging lenses, it is best to make the adjustment of inventory stock in the modify inventory module and not to use the insert button on patient file. *The insert button should only be used with invoice creation.
Navigate Forms	Use the navigation screen to go and find forms. You can activate level security to enable this form under "Password Control".
Network Sharing	Optizone Enterprise is a network capable product for local and wide area networks. Network sharing of the same database is an excellent advantage to stand alone software. Multiple users can work on the same patient at the same time, although they can not work in the same record area of that patient. *With multiple users working at the same time, two users can not edit the same record simultaneously. When one function is completed save the file so someone else can use it. For setup purposes EZ-Client must be installed on each individual "client" computer. To access Optizone from the server, you must create a shortcut to the optie.exe file from the server unto your client desktop. You must also set the "Start In"

path to the Optizone file, for instance "\\my_network\\C:\optizone enterprise\". This can be done on the properties of the shortcut. Read the help menu in Windows networking for further information.

Optizone Enterprise Edition is designed to centralize many store locations on one server. Whoever opens the system at a particular store will be logging on with the store number created in business information. The client files are shared by all locations for easy reference. The sales accounting is divided by the store location. The Appointment Scheduler is attenuated to the store logged on. The inventory is entered on location number for access specific to that store location.

Server capacity for the Enterprise version should have sufficient capacity to deliver the files to the stores at a reasonable time frame. "Wide Area Networking" can be accomplished using Windows Server 2000 and newer. Client access licenses need to be purchased for each computer that will be connecting. 600 kilobits bandwidth up and down is recommended with dedicated Internet lines. Speak to your IT professional so that he/she understands that you will be transferring data that requires reliability. An ample server and proper commercial grade network hardware will be required. You can visit hardware requirements on the ezzone.net website for more information. Waiting for data can be time consuming and costly. It is much better to pay more for a premium network than have valuable personnel waiting.

Notes (Address Information)

These notes will appear on the phone list under appointment monthly recall. For example if a patient wants to reorder disposable contacts every 6 months, type 6 in monthly recall interval and place a message in notes.

Operating System

EZ-Zone Software builds professional use database software systems. Approved operating systems are Windows NT, 2000, XP, Vista, Server 2000 and Server 2003 by Microsoft. Use of other systems may affect the stability of your database and could result in database corruptions.

Optizone Overview

Optizone Enterprise - Premium Software With Power.

Optizone is a feature rich program, operating on single station or network. Optizone is an optical management system designed to communicate all job descriptions performed in an optical dispensing environment using modem or print facilities.
Optizone is a specialized program that will increase your sales with the many direct mail marketing tools. Use practise management tools to gage progress.

Optizone has enterprise integration that will communicate with many of your operating systems program resources. Enjoy using Optizone to fulfill all your optical store computing needs.

Order Inventory

Bulk orders of inventory - contact lenses, eyeglass lenses and or eyeglass frames.

Bulk orders of inventory that were not available from stock can be ordered from the client files. For instance, if a client had a frame ordered on his eyeglass file, the days order can be generated and subjugated by supplier and business location.

At the end of day, all the frames required could be ordered by individual suppliers by fax or e-mail. Certain requirements have to be made to achieve this.

1. The client has to have an order for contact lenses, eyeglass lenses and or eyeglass frames created on their file.

2. The "Ordered" check button must be off.

3. The model or type field must not be empty.

4. Supplier name and account should be filled in for faxing to supplier. *But not required if phoning the

orders to the supplier.

To use the tool, go to the inventory menu and select "Order Inventory", select "From Client File" and choose department. i.e. contacts, glasses.

Use the 1-2-3 order description tools to create the desired list. Print to fax or e-mail and send. When completed, use the "Update" button to mark the product ordered on the client file. *The client information file must be closed to allow updating. The products will not show on this list again unless the "Ordered" button is clicked off.

Passkey First Time

If this is the first time you are opening Optizone, you must enter the password that came with your license into the main opening security screen or under license upgrade. All passwords in the system will be set to blank, that means you type nothing to access.
To change a password enter the level password required:
Password is located under "System" in the main menu.
Passwords can be changed as required.
To set location opening password, use the combo box to select proper store location (Multiple Store Users).
Numbers or characters can be used.
Letter case is not important.
6 levels of passkey are available, select the proper passkey setting in the form password.

Use master CD key - The passkey that came with your CD will open the password control for direct edit of all passwords. Type in the passkey that came with your CD and push OK.

You may also lock the billing invoice to a level passkey. Only a level passkey will enable edits to the invoice. Switch the check button to the on position.

You may lock the mail master lists. Only a level 4 passkey will enable edits to the invoice. Switch the check button to the on position.

To expand your system to include multiple licenses:

After purchasing a server license, you need to open the "License" item under "Open" in the menu bar.

If this is the first time you are opening Optizone, you must enter the password that came with your license into the main opening security screen or under license upgrade. All passwords in the system will be set to blank, that means you type nothing to access.

Password Control

This module is your main security. To change the password, you need to type in the password or your license pass key under the opening security if you are opening for the first time, type the new password one extra time to ensure that no error was made during entry. Use a password that is easy to remember. You may use numbers or letters. Once you have completed this function simply push Save. Use this module to initiate invoice security as an added feature.

Create staff information and logon passwords under “Staff Admin”. The passwords can be edited in this module.

Six Levels of passkey are available to allow delegation of specific modules. Use the default values on “Level Access” to start and you can adjust them as required later.

Use the master CD key that came with your CD to initiate the program under “license”.

Password control and advanced security are available for many screens and functions. You can set how you want the security system to function, what extent of control and to which staff members have access to what. In the event that you forget what your access passkey is to "Security Password Control" you can override it by using the master passkey that came with your Optizone purchase.

On Page Tab 1:

Begin by choosing your store location password, which is level 1. If you have multiple stores, select which store you want to set and click the edit button.

On Page Tab 2:

Create level passwords from 2 to 6. Higher passwords are able to open forms on lower level password entries. Use these levels of passkey to form a hierarchy amongst your staff. Managers for example would be assigned higher pass levels and more screen access. Level Password 6 should be reserved for the owner and/or whoever is in charge of setting passwords.

On Page Tab 3:

Set the form level between 2 to 6 for each screen access. Level 1 requires no password and is automatically active from store level logon.

On Page Tab 4:

You can opt to turn on advanced invoice security by checking the box. Select the buttons, grids etc. that you want to disable. You can choose which buttons are available to the staff member. You may want to lock everything tight or you may want to just lock certain items.

The invoice screen will have a password override that you can set on Tab 3 under "Invoice Screen Security".

*Note On "Grid- Invoice Items, No Edit After Save", this button allows the user create a new invoice and modify the invoice items, but once it has been saved, no further edit is allowed. If "Grid- Invoice Items, No Edit Allowed", is checked it will override this function and allow no edits at all.

On Page Tab 5:

On tab 5, you can manage staff passwords and level access. The staff member must be entered in staff administration first. You can assign staff access when using the staff logon tool under password control. You may also change the "Access Level under staff administration as well. If the staff access level matches the screen access level or is higher, the staff member logged on will gain immediate access.

On Page Tab 6:

You will find advanced tools for client file reassignment and invoice taken from inventory but not assigned tools.

Reassignment - Use this tool to reassign files from a client that already was in the database. It will bring all the files to the original client and delete the client address file.

Taken from Inventory - Use this tool to manage and report on items that were added to a client file from inventory but no invoice was ever generated.

Payment Journals

You can activate level security to enable this form under "Password Control".

Accounting - Sales Journals

Sales- create logs by day or between dates.
Payments - creates payment logs by day or between dates with method of payment journal.
Cost of Goods Sold - report the cost of goods sold by day or between dates. *Note the "control" which equals the wholesale cost amount must be filled in the inventories, or if the invoice is custom, must have "control" inputed seperately on the invoice screen.
Cost of Goods Sold by Invoice- report the cost of goods sold by invoice byday or between dates.

	Staff sales- creates logs of individual staff sales, enter by day or between dates. Use staff sales to calculate staff production or commissions etc. All reports are itemised per location.
Payment Method	Set default methods for psyments on bills. For example, Visa, Cash etc. When addinga payment to the bill, type the first letters of the desired type, V for visa etc.
Payments	Payments are made per invoice. Use the "find" button to view past outstandings for this particular client. Push the add payment button. It will automatically add the full amount owed, but you have the option of editing it to a different amount. Type the method until the selected method can be seen in the payment grid. "C" for cash, "Ch" for Check, "V" for visa etc. Payment Logs are available under Reports in the menu bar under sales logs. If they were itemized on the invoice by method, the various journals will generate by payment method and by location that the funds were collected.
Payments Displayed On Invoice	Optizone will display all payment records on the invoice. If you have multiple locations, it will track which store the payments were made in.
Phonebook	The phone directories have many features required for other functions to work. The supplier phone book needs the order desk e-mail address installed in order for the automatic emailing of client orders to perform. You must also have the doctors e-mail address installed to send exam reports. There is a communications list for suppliers. Use this for a all extra correspondence with suppliers. It is important to log communications with suppliers. You are sending them a great deal of money. There are seven directories, which include: · general directory · suppliers · staff administration · staff schedule · staff public info · doctors list · insurance providers It is important to fill the directories before you begin to use them as defaults later. In the supplier directory check off or on - Drop Shipment – For Contact Lens Orders. You can use the drop shipment tool on the client contact lens order form to order contact lenses from the supplier and have them shipped directly to the client. To enable this function you have to begin with the supplier phone book and enable the feature. Add in the cost of the shipping under the "Control" field and the retail price. When you fill the contact lens order on the client screen check the Drop Ship to Enable. This will cause an additional charge to the billing for the actual amount of the courier along with your other fees. You enable or unable this feature, as you like. Add the desired shipping information by inserting information from the client main screen or type in all new information. Click print or send email when finished. This tool does not function under the bulk client orders and must be processed as the come. The reference number for follow must be used for confirmation.
Po Number	The purchase order number located on the client contact lens and eyeglass file comprises of the client number and the order file number for quick anf easy reference.
Practise Analysis	Use this module located in the accounting reports menu to determine the amount of new patients or jobs

	being processed in any given time period. Use this module to calculate eye doctor referals. The inventory type sold module will display what type of inventory has been sold in a give time frame. With this information, you can see what inventory is moving the best.
Prescribing Doctor	Put your Doctor Directory in the doctor phone directory. This will allow you to access Doctors in the eyeglass prescription.
Prescription Error Handling	The eyeglass and contact lens form on client information has error handling and will give you a message if you forgot to add certain measurements or have made an error. This tool will help make complete records.
Prescription Print Out	Use the print button on the client RX glass screen. Select before printing, the "Rx" radio control. The system will install the Rx date.
Prev Bal (Button)	This button is located on the billing screen and is used to view any outstandings the patient has.
Print (Button)	Many forms have a selcet before print button. Use these radio buttons to further define the report you wish to print.
Print Note	Print note located on the client address screen will print the clients name and note details, such as a shipping label.
Printer Setup	Labels (single) - Use Avery labels on a tractor feed printer. size 1 7/16 x 4 inches. Mailing lists volume printing, use Avery 8160 labels. Reports - Use 8 1/2 x 11 standard paper. For windows NT, you must set up a custom label form. To build label form, under my computer: Press Printers File Server Properties Create New Form Width 3.92 Inch Length 1.50 Inch Press Save Give this form a name such as "My Label" and use this as the default for the label printer For Windows 95- Use user defined size for labels Width 1070 0.1 milmeters Length 381 0.1 milimeters On the mailing list in marketing, you have the option of using avery 8160 labels, which come in three rows of ten on a 8 1/2 x 11 sheet. Use these labels for high volume sending of brochures etc. All other forms use standard size paper 8 1/2 X 11.
Process Web Data	Process Web Data is the button located on the client information address screen. It is connected to the "Collect Web Data" tool. Collect Web Data is a tool that allows you to link your Optizone Enterprise database directly to your web site via our officetitan.net server. The web-site database connectivity tool can be ordered from EZ-Zone Software Ltd. Your client submissions are protected with 128-bit encryption via SSL (Secured Socket

	Layer). This tool comes with an annual fee and setup charge. This powerful tool can: 1. Collect all email and link the message directly to their account for easy response via the letter library. 2. Take in contact lens orders. 3. Receive address change information. 4. Collect appointment information. 5. New client registration. Once they have made a submission, you still have control over the processing of these files. The "Collect Web Data" tool is also password sensitive on your Optizone Enterprise so that you can assign who has access to the submission processing. Optizone uses ODBC - (Open Database Connectivity) tool that connects your Optizone database to your Internet web-site submissions database. Optizone uses Mysql driver 3.51 to make the connection. Once tool is installed, click the "Collect Web Data" button. You can remove errant files by clicking the "Remove Selected" button. The "Add All & Process" Button will take the data and make it available under the "Process Web Data" tool located on client information on the "Address" screen. On the client address screen click "Process Web Data", select which department you want to work on and use the "Navigate to File" button to see the record in client information. Use the "Update Address Info" button to change data to the newer data. It will only replace fields that have been filled on the collect web data. It will not overwrite fields with blank data. You can use the "Insert" button to transfer their message inquiry to the communications screen and load it into a letter using the "Insert" button on that screen. You will notice that you must navigate correctly to use this tool to avoid data file placement errors. When completed, click the "Order Processed" button highlighted in blue to take the item off the list. The "Collect Web Data" and "Add All & Process" button has to be run before using this tool. You may choose to click the "Remove Selected" button to remove errant files. You may review result history by using the date function tool.
Purchase Order Number	The purchase order number located on the client contact lens and eyeglass file comprises of the client number and the order file number for quick anf easy reference.
Quick Note	Quick Note is a special tool to generate a fast note to email, print or to fax located under "Messages" in the menu bar. It will automatically date and create headers for the note. It is a valuable corresponding tool.
Rda 9 Rapid Data Architecture	On version 09 and newer, the client information data architecture has received an entirely new process sub-routine. The speed it takes to view screens on client information has been decreased by four times compared to previous editions. Larger databases will see even greater speed efficiencies. RAM requirements for the serving computer have been cut in half or more.
Recall	See Appointment Recall, Contact lens Warranty Recall or Mailing Lists for user defined recall.
Remove From Mail List	See - Send No Mailers
Reorder Inventory	Use this module to order inventory lower than the minimum quantity levels on the inventory screen. Select stock, supplier and purchaser and push print to printer or fax. The minimum quantity on the inventory screens has to be higher than the quantities in stock to activate. This function creates the purchase order for faxing or printing.

Reports Archives	Use this log to see when the last time contact lens warranty, appointment recalls and updates were performed. It will also log the last time billing statements were sent. The action taken will be specified along with the date and time. This tool makes it possible to see if you forgot to perform these functions.
Rx Glasses (client Information)	Prescription can be generated by the inventory insert button under lens type, so be sure to fill in the Rx after lens selection if not included in inventory details. The cylinder axis can be added per patient. Lens and coating type can be inserted from inventory by using the insert button. The frame can be inserted from inventory using the insert button. All items and prices inserted from inventory will be transported automatically to the billing invoice. To print order, make selection of report before hitting the print button. Choose from full size 8 1/2 by 11 inch page or half size to fit into eyeglass order tray box.
Rx Type	When creating a prescription for glasses, you may want to designate wheter the Rx is for reading, distance etc. There is a default list under "Rx Types" if you desire to modify the list. It appears on all print outs and e-mails. The default is "Standard Rx".
Sales By Staff	Tracking of staff sales starts with the directory - Staff Admin. Enter all staff members into the directory. You can turn on "Staff Logon" under password control and all invoice sales will automatically capture the staff member that is logged on. Otherwise, each staff member will have to input his or her number onto the invoice. For very competitive sales commissioned environments, the sale is broken into two parts, the staff member making the sale and the staff member dispensing the product. Sales reports can be made for each of these groups. This tool can be password protected under "Password Control".
Sales By Supplier	Use Sales By Supplier tool to calculate how many items were sold by an individual supplier. This tool is date sensitive and location sensitive. *Note- This field "Supplier" is located on the invoice items grid. It is auto loaded when the item is loaded from inventory with an assigned supplier.
Sales Logs	You can activate level security to enable this form under "Password Control". Go to Sales Logs on the menu bar under accounting reports and select "Sales Logs" or select "Sales Logs - Today Only" for staff reconciliation. Select a particular location or all locations. Payments - creates payment logs by day or between dates with method of payment journal. Sales And Tax - create logs by day or between dates. Cost of Goods Sold - report the cost of goods sold by day or between dates. *Note the "control" which equals the wholesale cost amount must be filled in the inventories, or if the invoice is custom, must have "control" inputted seperately on the invoice screen. Cost of Goods Sold by Invoice - report the cost of goods sold by invoice by day or between dates. Staff Sales - creates logs of individual staff sales, enter by day or between dates. Use staff sales to calculate staff production or commissions etc. All reports are itemized per location. Use the "Sales Logs - Staff" for more detailed reporting. Taxed Invoices Only - report on invoices that have a tax component only. For account receivables, go to accounts receivable under accounting reports on the menu bar.

Sales Logs - Today Only	You can activate level security to enable this form under "Password Control". Go to Sales Logs on the menu bar under accounting reports and select "Sales Logs - Today Only" for staff reconciliation. This tool becomes valuable for allowing staff to print their day logs without having access to all accounting dated reports. Select a particular location or all locations. Payments - creates payment logs by day or between dates with method of payment journal. Sales And Tax - create logs fo the day. Cost of Goods Sold - report the cost of goods sold by day or between dates. *Note the "control" which equals the wholesale cost amount must be filled in the inventories, or if the invoice is custom, must have "control" inputted seperately on the invoice screen. Cost of Goods Sold by Invoice - report the cost of goods sold by invoice . Staff Sales - creates logs of individual staff sales, enter by day or between dates. Use staff sales to calculate staff production or commissions etc. All reports are itemized per location. Use the "Sales Logs - Staff" for more detailed reporting. Taxed Invoices Only - report on invoices that have a tax component only. For account receivables, go to accounts receivable under accounting reports on the menu bar.
Scanner Barcode	Barcode scanning of inventory items is available on all inventories. *Note Barcode inputs are case sensitive. To check your inventories go to the modify inventory, and select inventory of your choice. Click on the count inventory tab to begin. Begin by selecting the inventory items to be counted and checked. You have the option of checking all locations, checking a single location, checking location and supplier and by "contains" field. The "contains" field allows you to search phrases from within the item description. In order for the inventory check to function, you must check all the inventory within your given selection parameters. Push the reset button to change the check quantity and checked date to zero. Click on the scan button, and began scanning or typing in the item numbers from the selection. Each time you select an item and additional single item will be added to the checked inventory. Once all items from the selection have been scanned, you may preview or print a report that will display any and all discrepancies from a list. It also calculates the wholesale value differences. At any given time, you may edit the grid to effect a change. If your results seem to be correct, you may now update the list from your inventory to reflect the checked inventory. It is important to recognize, that once the update button has been used that there is no restore. It would be a good idea for you to create a backup prior to utilizing this tool. Barcode scanner -you may utilize a wedge type barcode scanner that connects between your keyboard and your computer. These are inexpensive and easy to use. You could buy a cord long enough to reach your entire inventory from a computer station. Make sure that's the audio is turned up high enough on your computer so that you can you can hear the beep when the product you scanned has registered. Alternatively, there are also wireless scanners available to perform this task. You will have to speak to your hardware representative to have the scanner installed correctly.
Security # - Credit Card	When processing credit card orders, some banks require that you get the last three digits on the back of the card. This field is located on the client information screen under the credit card number field.

Security Features	This software has 6 levels of security built into the program. View password control form to see which passkey level opens which modules. Upon typing in your EZ-Zone serial number all passkeys are blank, which means you type nothing in the box and press OK. When entering the main security the store number must entered first. If this is the first time you are opening Optizone, you must enter the password that came with your license into the main opening security screen. All passwords in the system will be set to blank, that means you type nothing to access. To change a password enter level 4 password: Password is located under "Open" in the main menu. Passwords can be changed as required. Correctly input the existing level 4 password and enter the new password twice. To set location opening password, use the combo box to select proper store location (Multiple Store Users). Numbers or characters can be used. Letter case is not important. 4 levels of passkey are available, select the proper passkey setting in the form password. Use master CD key - The passkey that came with your CD will open this tool for direct edit of all passwords. Type in the passkey that came with your CD and push OK. You may also lock the billing invoice to level 3 passkey. Only a level 3 passkey will enable edits to the invoice. Switch the check button to the on position. You may lock the mail master lists. Only a level 4 passkey will enable edits to the invoice. Switch the check button to the on position.
Select Before Print	The "Select Before Print" button will allows a more defined report. Select the report required before printing.
Send Html Graphics	Several procedures have to occur when sending custom e-mail graphics with your e-mail broadcast. You will need a html editor such as Front Page and know how to use it. You may want to contract with your webmaster to build an html page for you. The letter has to be built as a html file and saved on your computer (or network) that is sending e-mail. All graphics, sound, pictures etc. have to be hyperlinked from this file to your web server for access. You are not sending the graphics with the letter, only letter with the hyperlinks. Your html file size should fit into e-mail receive folders for maximum exposure. When sending the file with EZ-Zone Software, the html file is added as an attachment. No memo field or letter is included as this will leave the html file as an attachment. Otherwise the html folder will be open when they view their e-mail. Finally, use the e-mail list serving tool to send. Visit this page for more info and samples. http://www.ezzone.net/mail.htm
Send No Mailers	To remove a client from the advertising mail list push the button on the client address screen. This client will no longer receive mail from data mining other than appointment and contact lens warranty recall. Also if the client address does not contain a street address it will activate the send no mailers function.
Ship Contact Lenses Direct	You can use the drop shipment tool on the client contact lens order form to order contact lenses from the

	supplier and have them shipped directly to the client. To enable this function you have to begin with the supplier phone book and enable the feature. Add in the cost of the shipping under the "Control" field and the reatail price. When you fill the contact lens order on the client screen check the Drop Ship to Enable. This will cause an additional charge to the billing for the actual amount of the courier along with your other fees. You enable or unable this feature as you like. Add the desired shipping information by iserting information from the client main screen or type in all new information. Click print or send email when finished. This tool does not function under the bulk client orders and must be processed as the come. The reference number for follow must be used for confirmation.
Shipping Address	Shipping Address can be inputed under notes in client address. To print a label do not add the name again, just the address, select print note and push print.
Sounds And Beeps	If your computer has speakers, you will hear a beep every time the data fileld is filled completely. This also means that no further information can be stored in that field.
Staff Activity Tracking	Staff Activity Tracking - When using the staff logon screen, the main procedures done to the client files are documented. If a payment is missing from a file, you could look up the staff activity on that client to see which staff member performed the deletion. Furthermore, you can create reports that show what procedures that your staff are performing in whole.
Staff Administration	Staff administration information is located in under "Directories " on the menu bar. This list is used for setting the access level as well as making contact directories. Pay attention to the staff member number; this is used as the personal identification number for staff logon. Create passwords for staff members as desired. The print button will make a mail label. Staff security access level can be adjusted as desired under password control. The screen "Access Level" is the value assigned to screens for staff to be able gain entry. The values for the screens are done under password control. Under store only logon, you must use the passwords assigned per level. Access level one requires no password. You can assign staff access when using the staff logon tool under password control. You may also change the "Access Level under staff administration as well. If the staff access level matches the screen access level or is higher, the staff member logged on will gain immediate access. To add a staff member to the Appointment Scheduler B Multi - Staff, check on "Will be on appointment schedule B".
Staff Level Security	Under staff administration, you can set the level of password security that each staff member has. This will entitle the staff member to access screens that are equal to or lower in security level.
Staff Logon	Under modify passwords, go to edit staff passwords. Check the "Staff passwords are required for second level logon." The staff information can be inputted under "Staff Admin" with their passwords. When this is activated a second "Staff Logon" Screen follows the main security screen and the staff member has to use his staff number and password to logon. All functions performed on client information are identified by the user and tracked. If you are using "Staff Log On" you may log out a staff member under the "Exit" command in the main menu bar. You may then log on a different staff member as required.
Staff Sales	Staff sales are generated on the invoice by typing in the staff number in the appropriate box. Staff

	members' information must first be written into the phone book under staff members. Please note the appropriate staff number generated per member. Under Sales Logs you will find staff sales logs generated by day or dates. Select staff # for individual reporting. Use either of these tools for commissions or multi practitioner accounting.
Staff Scheduler	The staff scheduler can be found on the main Navigate screen or in the Main Menu bar under Directories. Use the staff scheduler to log: 1. Staff days working and hours 2. Log time off: Vacations, Statutory Holidays, Sick Days, Overtime and other specified reason that you may want to define. 3. Create reports that you can use to generate payroll. An export to Excel Function is available to link with Payroll software. 4. Use the Staff Sales Log to produce reports that contain profitibility by the hour for your staff. To use the Staff Scheduler you will be required to set up the following: 1. FIll in all staff members in the StaffAdmin Directory. 2. Fill in all your store locations in Business Information. 3. Set up default values for "reason off" from work. To begin, select the day on the calendar that you wish to populate. Select the business location that you want to assign. Click the "Add Staff" button. Select the staff member and click "Add To File" button. Fill in the start time, end time etc. Total hours is the amount of hours that they are working. Hours off is the amount of time they missed relative to the total hours they were scheduled for. Pay hours is the amount of hours that will show on the payroll and that you will pay them for. Overtime is the amount of overtime hours that you will be paying them for. Note is for any additional information that you want to add to the persons file. Reason is populated from default values. It is important to fill this form out completely to effect the reporting tools properly. Schedule reports are available by clicking the "Reports" button.
Start Up	You are about to enter the computer world of point and click. But to be able to use the powerful default settings that Optizone has available, the following tables must be prefilled: Inventory Business Information- Creates headers for all forms. Phone Book- Fill in supplier first for use with inventory. Staff Members- Staff must remember their number. Exam Input- For exam files and quick consultation reports. Address Input Data- For city, province and country. Inventory- Fill in the items that you will be selling prior to using the Insert From Inventory buttons. Letter Library - Type your letters used for marketing and communication.
Supplier Sales	Use Sales By Supplier tool to calculate how many items were sold by an individual supplier. This tool is date sensitive and location sensitive. *Note- This field "Supplier" is located on the invoice items grid. It is auto loaded when the item is loaded from inventory with an assigned supplier.
Supplier Web Sites	You can record supplier web - sites for quick reference in the supplier phone book. Push "Go to Site" for connection. You will need Internet Explorer as your default browser for this tool to activate and work properly.
Suppliers Phone Book	To add suppliers to the default phone book, go to "Phone Books" on the main menu bar under phone books. The suppliers have to be inputted here and then will be available in the inventory modules by using the combo boxes. Utilize the email for client eyeglass and contact lens orders by inputting the email address for your

suppliers under "Order Desk". If they have a change in email address, it will be updated on your next order.

There is a seperate letter log for all supplier correspondence within the phone directory. You may use the letter library with this module as well.

You can use the drop shipment tool on the client contact lens order form to order contact lenses from the supplier and have them shipped directly to the client.

To enable this function you have to begin with the supplier phone book and enable the feature. Add in the cost of the shipping under the "Control" field and the reatail price.

When you fill the contact lens order on the client screen check the Drop Ship to Enable. This will cause an additional charge to the billing for the actual amount of the courier along with your other fees. You enable or unable this feature as you like.

Add the desired shipping information by iserting information from the client main screen or type in all new information.

Click print or send email when finished. This tool does not function under the bulk client orders and must be processed as the come. The reference number for follow must be used for confirmation.

Support

Support is available on line at www.ezzone.net. Your license contract must be up to date for phone support.

Phone Support (416) 231-5841

Take Inventory Count

To check / count your inventories go to the modify inventory, and select inventory of your choice. Click on the count inventory tab to begin.

Begin by selecting the inventory items to be counted and checked. You have the option of checking all locations, checking a single location, checking location and supplier and by "contains" field. The "contains" field allows you to search phrases from within the item description. In order for the inventory check to function, you must check all the inventory within your given selection parameters.

Push the reset button to change the check quantity and checked date to zero. Click on the scan button, and began scanning or typing in the item numbers from the selection. Each time you select an item and additional single item will be added to the checked inventory. Once all items from the selection have been scanned, you may preview or print a report that will display any and all discrepancies from a list. It also calculates the wholesale value differences.

At any given time, you may edit the grid to effect a change. If your results seem to be correct, you may now update the list from your inventory to reflect the checked inventory. It is important to recognize, that once the update button has been used that there is no restore. It would be a good idea for you to create a backup prior to utilizing this tool.

Tax Journals

Tax information is collected in the sales logs under accounting reports. Tax percentages are set in Business Information on the menu bar under "System". Tax rates are caculated to 1/10,000 of a percent. Up to two different tax names and rates can be applied per location as required. The tax rate is applied on invoice by clicking the tax rate buttons on or off as required.

Use the "Taxed Invoice Only" button to show specific invoices that have taxed items.

Date sensitive reports can be generated as required.

Taxable Items	The miscellaneous inventory holds all taxable items. Click the appropriate tax buttons. All final tax allocations are attenuated to the location where the tax was collected. When importing from the Misc Inventory using the Insert button, the tax component will transport with the item. Further use of the taxation buttons can be turned off or on as required.
Throttle For E-mail	The E Mail Throttle Tool is designed to send letters out at a speed that is acceptable to your Internet Service Provider. For example many Internet Service Providers will not allow you to send out emails greater 1 letter per 5 seconds. These restrictions are installed to keep mass mail broadcasters from junking the bandwidth of the Internet. The E Mail Throttle Tool works with the following parameters. Quantity per load is the amount of letters that will go out until there is a time delay. Generally a quantity of 1 letter every 5 seconds at a time is acceptable to most mail servers. Seconds is the amount of time that will elapse until the e tool will continue the mailing. Typically 5 seconds is quite adequate. You can try 2 seconds and see if your ISP keeps your mail moving. You may try to adjust these items to speed up but you may run into error messages from your mail server. Likewise you may have to slow down the delivery to make it acceptable to your mail server. The object is to have the quantity as high as possible and the time delay as low as possible. The e tools that come with Optizone are designed to be used strictly for your OWN client list and to communicate to them on an automated basis. If you feel that you need to communicate with people in the hundreds of thousands or more, you may have to speak to your Internet Service Provider and receive permission to use their server for that size of mailing. When sending email through EZ-Zone Software, Outlook Express must be the default email program. Also, under security in Outlook Express in the options, the "Warn if other programs are using Outlook Express for email" must be clicked off.
Track Sales By Inventory Tag	If you assign a tag to an item in inventory, the tag will itemize on the cost of goods sold journal under sales accounting.
Transposition - Power	There is a calculator tool available on the the client eyeglass and contact lens screen. With this calculator, you can transpose lens powers, MOR (manifest over refraction) and convert diopter and radius measurements.
Turn Off Appointment Recall	Under business information , set the client recall interval to 0. When a client record is added, no recall date will be added. You can manually reset the clients' recall as you wish on edit.
Vetex Distance Calculator	Use the calculator available on the eyeglass or contact lens screen. To convert diopters into radius of curvature, type in the diopter power and push "CalculateR". To convert radius of curvature into diopters , type in the radius in mm and push "CalculateD". To use the vertex distance conversion tool, type in the power, select the vertex distance that the power was examined at, select the new vertex distance, and push "CalculateP". For contact lens power, the new vertex distance is zero. Vertex distance 13.5 is only the default vertex distance and can be changed as required. All powers are generated to exact measurements to the fourth decimal. You can round the resulting numbers to suit your new prescription.
Video Display	Select display in "control panel" under My Computer, push on settings, set size to 800 by 600. This will maximize the size of the screen for easy reading.

View Last Rx	Use this button function to look at previous contact lens or eyeglass prescriptions for comparison when writing a new prescription. To copy add old Rx to a new file, select which prescription you want to add and click on the appropriate "add" button. Typically the last Rx is the one that is being renewed, so be sure that the file selected is the last file or the file that you require.
Warn Me About Email	EZ-Zone Software uses Outlook Express to send email and must be the default email program. To set Outlook Express as your default email program, open Inrternet Explorer: select Tools, Internet Options, Programs and under E-mail select Outlook Express. Open Outlook Express: Tools, Options, Security. The "Warn me if other applications are using Outlook Express for email" must be clicked off.
Web Site Connection	Collect Web Data is a tool that allows you to link your Optizone Enterprise database directly to your web site via our officetitan.net server. The web-site database connectivity tool can be ordered from EZ-Zone Software Ltd. Your client submissions are protected with 128-bit encryption via SSL (Secured Socket Layer). This tool comes with an annual fee and setup charge. This powerful tool can: 1. Collect all email and link the message directly to their account for easy response via the letter library. 2. Take in contact lens orders. 3. Receive address change information. 4. Collect appointment information. 5. New client registration. Once they have made a submission, you still have control over the processing of these files. The "Collect Web Data" tool is also password sensitive on your Optizone Enterprise so that you can assign who has access to the submission processing. Optizone uses ODBC - (Open Database Connectivity) tool that connects your Optizone database to your Internet web-site submissions database. Optizone uses Mysql driver 3.51 to make the connection. Once tool is installed, click the "Collect Web Data" button. You can remove errant files by clicking the "Remove Selected" button. The "Add All & Process" Button will take the data and make it available under the "Process Web Data" tool located on client information on the "Address" screen. On the client address screen click "Process Web Data", select which department you want to work on and use the "Navigate to File" button to see the record in client information. Use the "Update Address Info" button to change data to the newer data. It will only replace fields that have been filled on the collect web data. It will not overwrite fields with blank data. You can use the "Insert" button to transfer their message inquiry to the communications screen and load it into a letter using the "Insert" button on that screen. You will notice that you must navigate correctly to use this tool to avoid data file placement errors. When completed, click the "Order Processed" button highlighted in blue to take the item off the list. The "Collect Web Data" and "Add All & Process" button has to be run before using this tool. You may choose to click the "Remove Selected" button to remove errant files. You may review result history by using the date function tool.