ocelot

Practice Management Software

User Guide

Version Release:

19 August 2015

Last Updated:

August 2015

The Ocelot Practice Management Software is officially developed and distributed by Opticare Pty Ltd.

This software platform was first released in 2004.

OPTICARE

Opticare Pty Ltd

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For further queries or issues relating to the Ocelot platform, please visit our **Opticare Support Help Desk** and submit a ticket if required:

http://www.opticare.com.au/support

Table of Contents

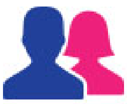
1 Introduction

By tracking and controlling every aspect of your business operations, including your customer service area, exam room, stock control, marketing and, of course, your GST and accounting, Ocelot will help you to increase efficiency, improve communication, increase sales and reduce costs.

If you have any comments regarding the new version of Ocelot, we would love to hear from you. Please send us an e-mail with suggestions, improvements or ideas for future releases. We would appreciate any feedback you have about the platform and are always working on improving Ocelot for our users.

What's New

The latest version of the Ocelot software has been redesigned with the end user in mind. The interface has been redesigned with a more simplified look and feel with updated icons, along with the following updates:



Patients

- Automatic Fill quote in RX Pad. A time-saver function.
- New Image/Documents attachment function for Patients
- New Eye Diagrams and Illustrations in Consultation
- New Email Order function for Contact Lens jobs
- New Optional Approval System for consultation eg. Junior staff actions require approval from senior staff before consultation can be saved

Marketing

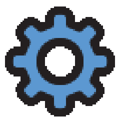
- New Marketing function with unlimited filter options

Reports

- New Job Due Report for both RX and Contact Lens jobs
- New Practice Management Functions: Manage Purchase Orders, Purchase Invoices, Petty Cash, Expenses

Appointments

- 7 additional Appointment Types
- 15 minute Time Scale Option for Appointment Book



Setup

- Added 20 new recalls to suit marketing needs
- Import/Update Invoice items using Eyetalk Digital

System Requirements

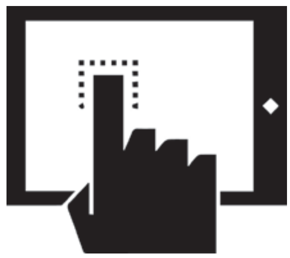
Computer Specifications:

Operating System	*Windows 2000 / XP / 7 / 8 / 10* **NOTE**: Ocelot cannot run on a Mac natively, but the software can still be accessed via any modern 'Virtual Machine' that supports Windows XP/7. E.g. VMware Fusion, Virtual Box, Parallels Desktop, Boot Camp.
Memory	*512MB of RAM or greater*
CPU/Processor	*Intel® Core i3 Processor or greater*
Graphics Card/Video	*512MB NVIDIA GeForce 9600 series or higher*
Screen Resolution	*Minimum of 1366 x 768 pixels*
Colours	*32-bit*
Hard Drive Space	*500Mb of free Space or Greater*
Internet	*A **fixed broadband connection** is recommended*

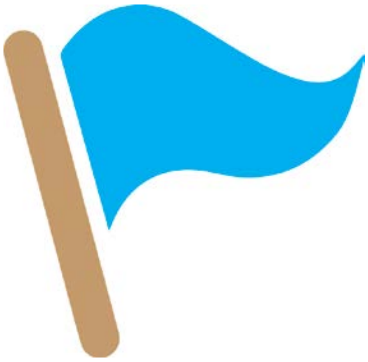
Tablet Specifications:

Ocelot is currently compatible with Windows Tablets running one of the following operating systems:

- *Windows 7*
- *Windows 8*
- *Windows 10*



2 Getting Started



The Ocelot Practice Management System is a Microsoft Access® runtime installation designed for use on Windows ® systems.

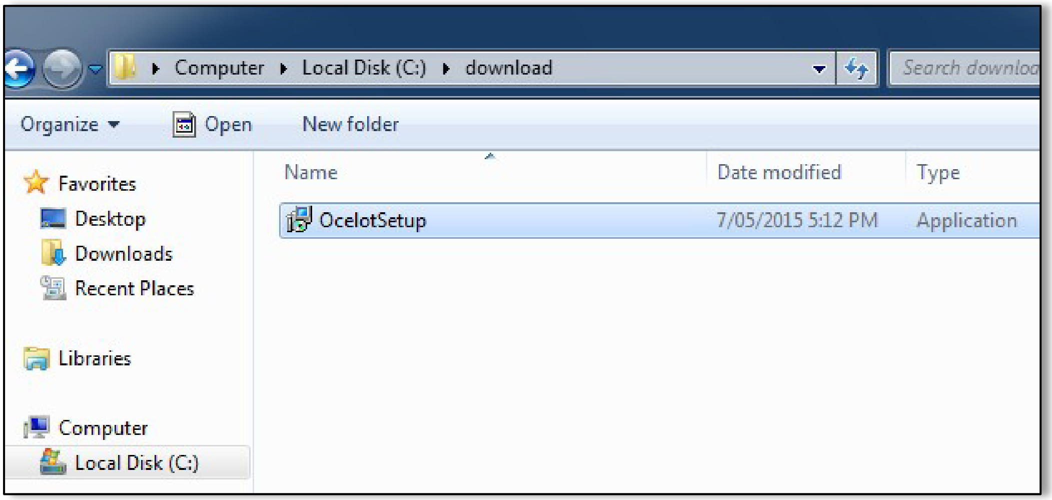
Software Installation

The system will run on Windows Vista® as a client version or stand-alone version, not a server version.

Windows XP® and Windows 7® are the preferred and supported platform.

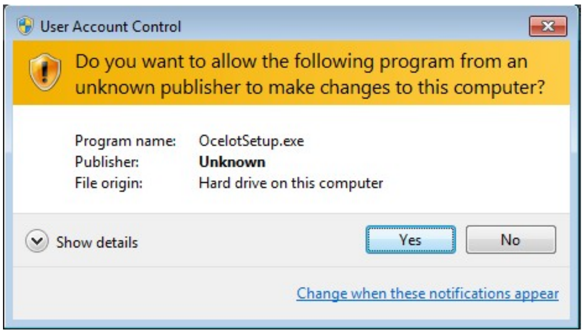
The system will run as a standalone runtime version without Microsoft Office® and/or Access® installed.

1. The installation file can be downloaded from the Opticare website at: http://www.opticare.com.au/software
2. The file should be saved to your local Downloads directory.
   Please click on **OcelotSetup.exe** icon to initiate the installation process.

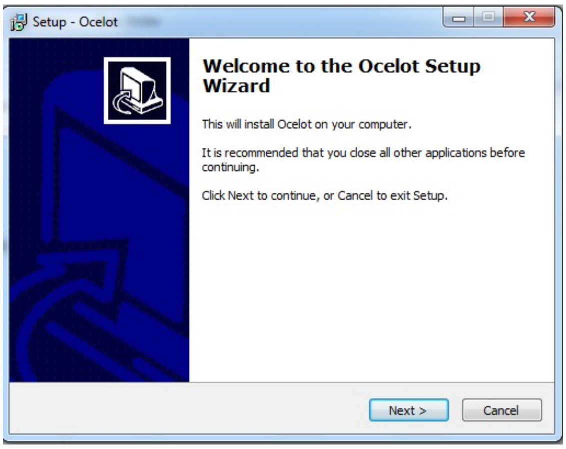


3. Follow the on-screen prompts for a typical installation. Screenshots of the process are on the next few pages.

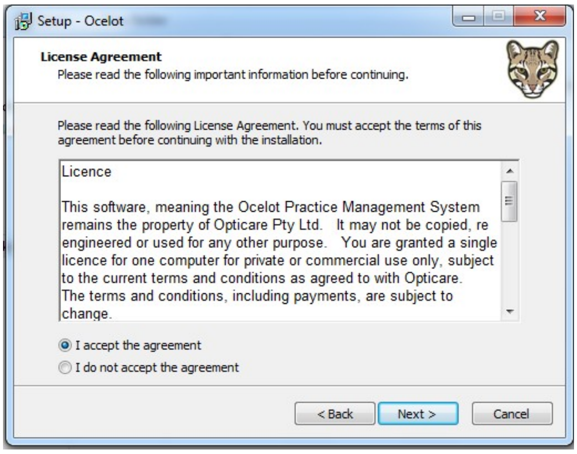
1.


User Account Control
Do you want to allow the following program from an unknown publisher to make changes to this computer?
Program name: OcelotSetup.exe
Publisher: Unknown
File origin: Hard drive on this computer
Show details
Yes
No
Change when these notifications appear

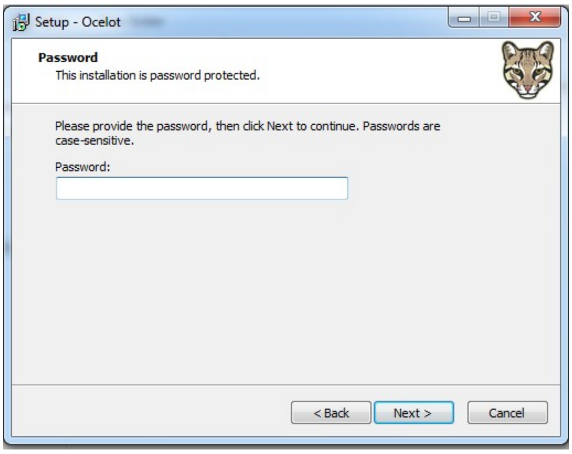
2.


Setup - Ocelot
Welcome to the Ocelot Setup Wizard
This will install Ocelot on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

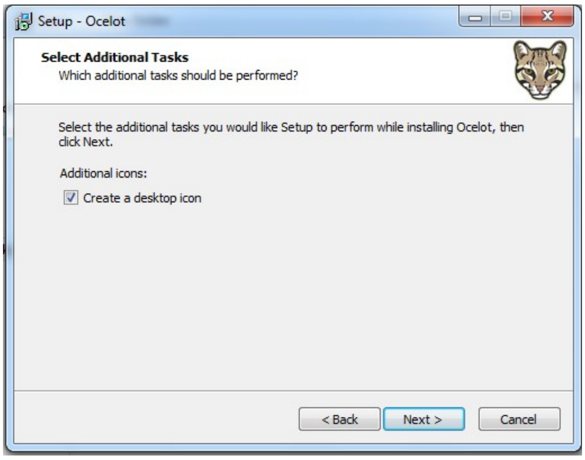
3.


Setup - Ocelot
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
Licence
This software, meaning the Ocelot Practice Management System remains the property of Opticare Pty Ltd. It may not be copied, re engineered or used for any other purpose. You are granted a single licence for one computer for private or commercial use only, subject to the current terms and conditions as agreed to with Opticare. The terms and conditions, including payments, are subject to change.
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

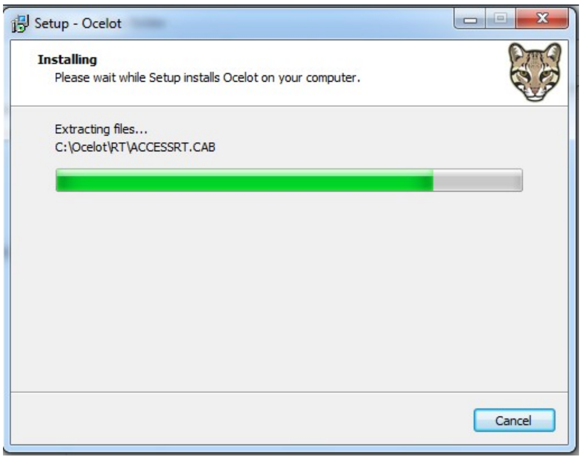
4.


Setup - Ocelot
Password
This installation is password protected.
Please provide the password, then click Next to continue. Passwords are case-sensitive.
Password:
< Back
Next >
Cancel

5.


Setup - Ocelot
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing Ocelot, then click Next.
Additional icons:
Create a desktop icon
< Back
Next >
Cancel

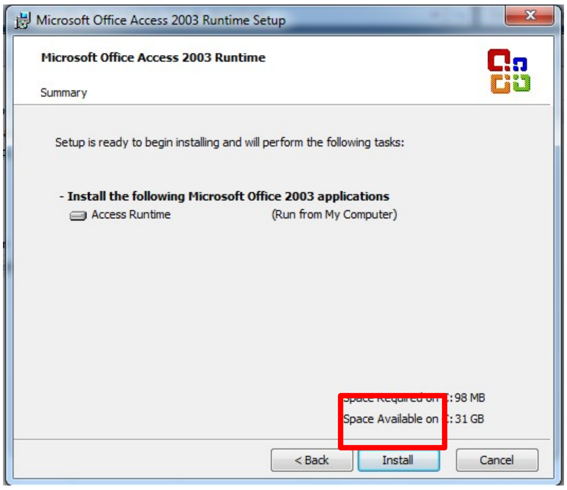
6.


Setup - Ocelot
Installing
Please wait while Setup installs Ocelot on your computer.
Extracting files...
C:\Ocelot\RT\ACCESSRT.CAB
Cancel

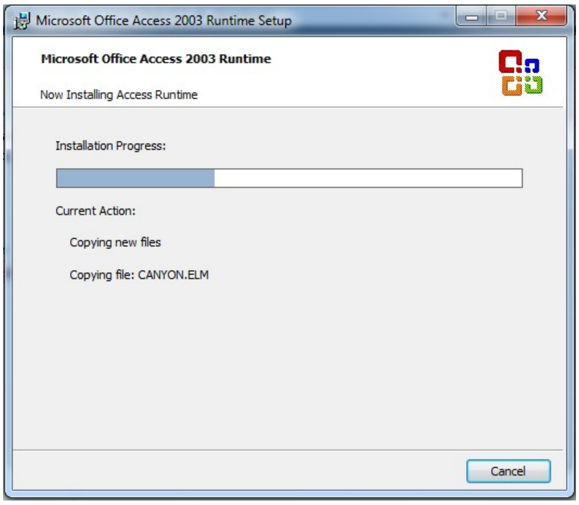
7. An access Runtime Setup installation will start automatically if it isn't currently installed on your computer.

   Click the **Install** button to continue.

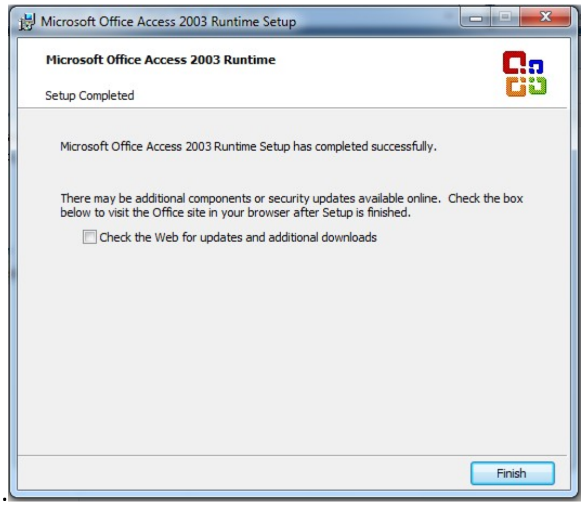
8.



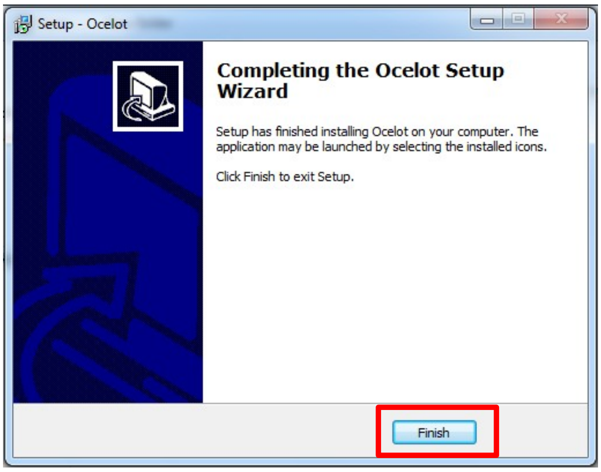
9.



10.



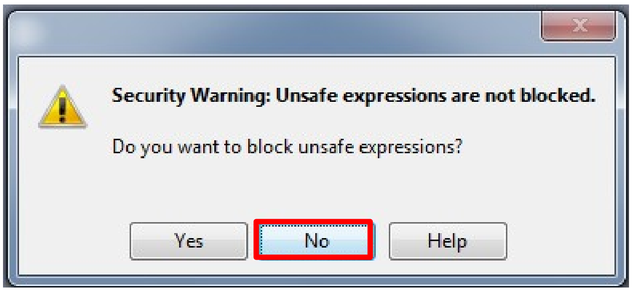
11.



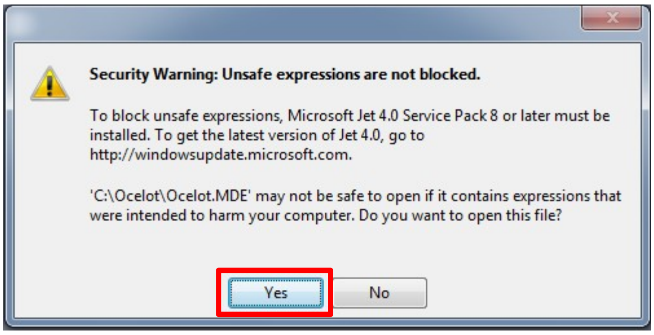
Starting up the Program

1. Double click the Ocelot icon from the Desktop

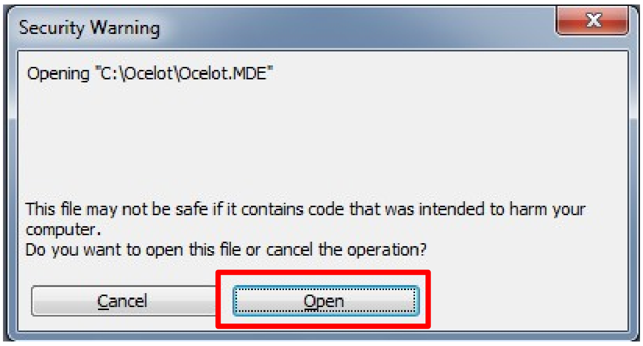
2. Depending on your system and security settings, the following message may appear at start-up. Click the No button.



3. A warning message will appear asking if you would like to open the file or not. Click the Yes button.



4. Click **Open** to continue starting the program.



5. The startup screen will appear. Click on **Start Ocelot** to commence using the software.

6. The first screen that appears after starting the system is the main **Practice Management Screen**. From here, you can navigate to all areas of the system by clicking the appropriate buttons.

3 Initial Setup

Before beginning to use the system, some basic set up is required.
This includes: setting up invoice items, cash sales, practice details, password and a few other items.

The SETUP screen is accessible from the main screen by clicking either the **Setup** link or icon.

1. Click the **Setup** button (icon or text) to open the Setup form. A login screen will show up.
2. Please use **GEORGE** as the password. The procedures for this are detailed in the next few pages:

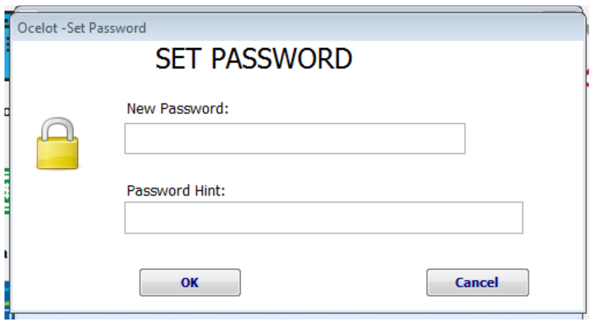
Password Setup

A security password can be set to protect the **Reports** and the **Setup** screens. In Setup, click on the **Security** icon. You can set the default login expires time and enable/disable password protection in Ocelot if required.

New Password

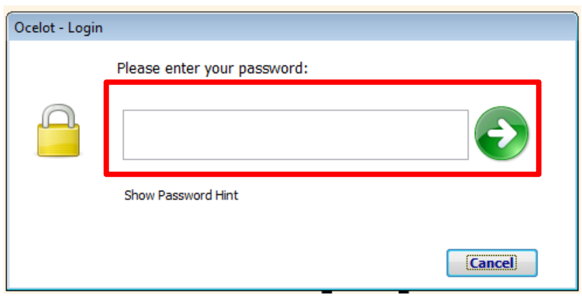
1. Click the **Set New Password** button in Security screen to setup a new password

2. The default password is **GEORGE**. You can enter a new password together with a password hint, which will help you to remember the password during the login screen.



NOTE: There is no way to recover a forgotten password, as we use a strong one-way encoding to store the password. A password reset service is available through Opticare.

Login with your Password



1. In the login screen, enter your password
2. Click the green login button

If you forgot your password, click the **Show Password** Hint text. Your preset password hint will show up.

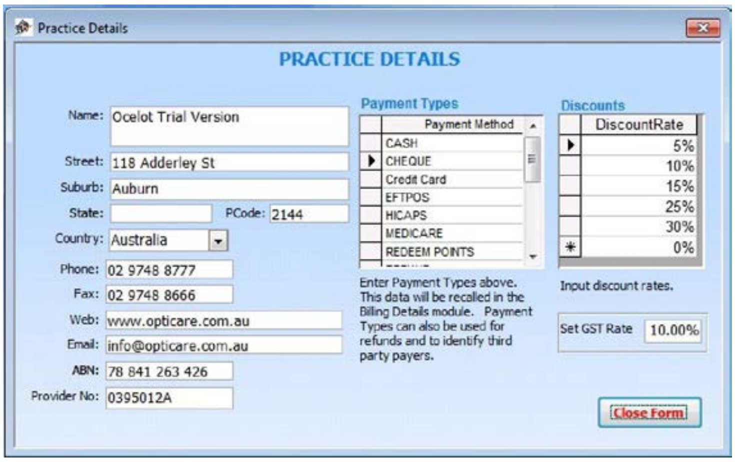
HINT/TIP:	Having troubles remembering your password? Please contact Opticare to organise a password reset.

Setting Up your Practice Details

1. From the Settings screen, click on the **Practice Details** button

2. Enter your practice and any additional payment details and if necessary, edit discount details.

The GST Rate is the default rate to calculate GST amount when you change **Sell Price** for Invoice Items.



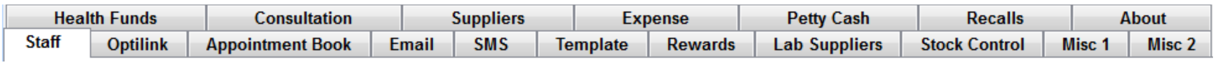
3 . Tab off each field to save the data when changed.

If you set your Country to New Zealand, the ABN field will be replaced with **GST Regn No** and will reflect on all print outs.

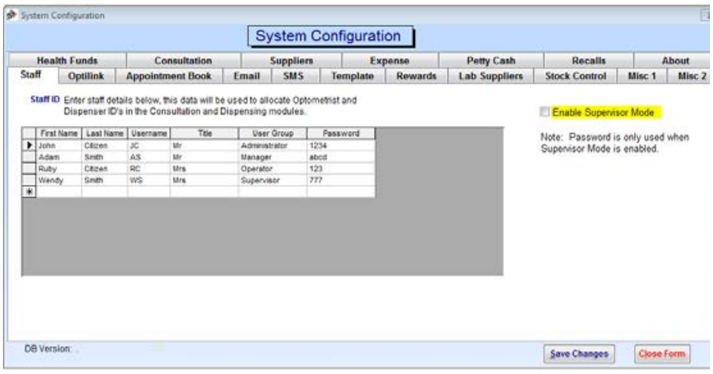
Set Up of System Configuration

1. From the Settings screen, click on the **System** button.

System Configuration consists of several tabs:

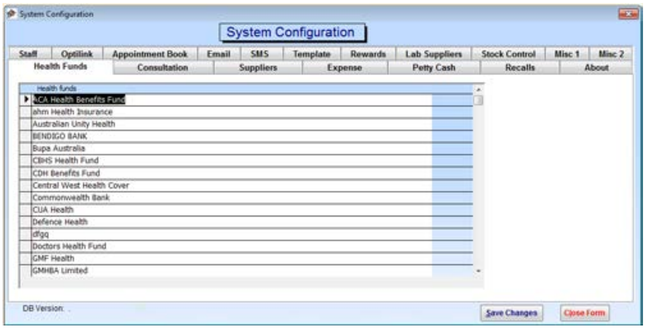


1. STAFF



Staff/Users which will be selected in your forms. You can amend their User Group/Access Levels from this tab.

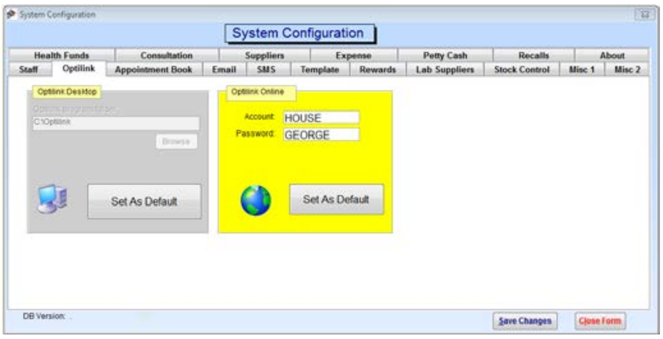
2. HEALTH FUNDS



Displays a complete list of available Health Funds.

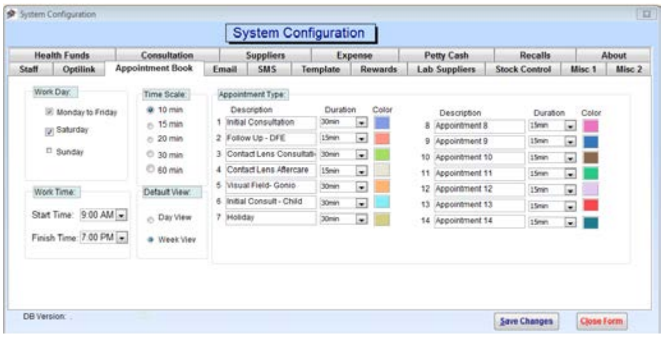
- To add a new Health Fund, scroll down to the end of the list.
- Type the Health Fund name into the blank row and press **Enter**.
- Then click **Save Changes**.

3. OPTILINK



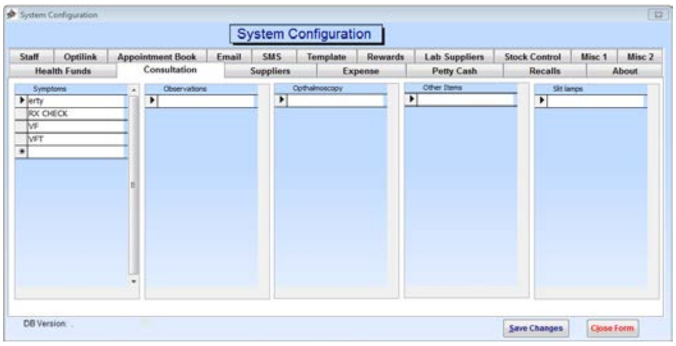
Used to specify the Optilink Desktop folder location and/or Optilink Online login details

4. APPOINTMENT BOOK



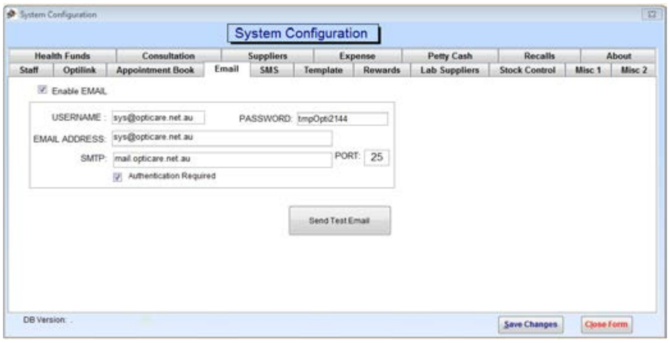
Settings for the Appointment Book – including Work Days/Times and Appointment Types

5. CONSULTATION



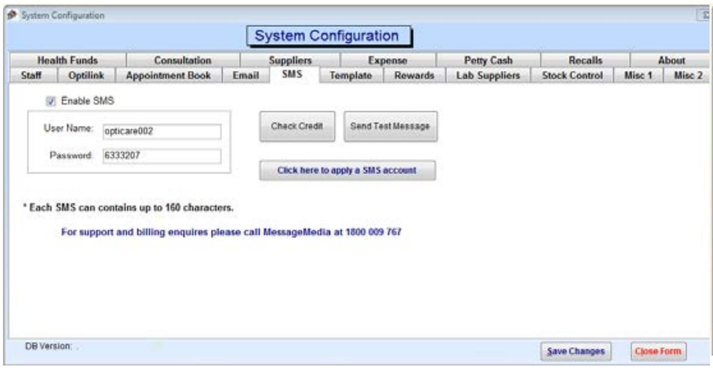
Displays default values for Consultation data

6. EMAIL



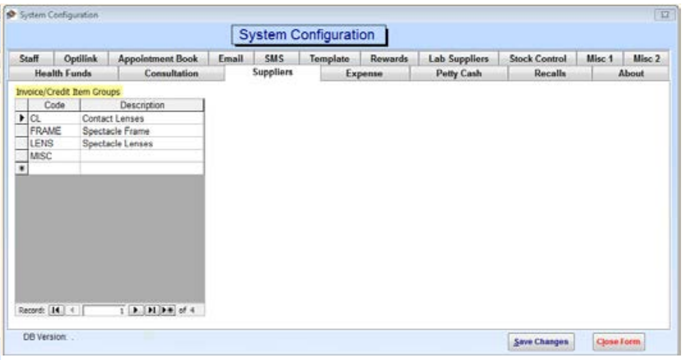
Specify your email settings to send email notifications to customers via Ocelot

7. SMS



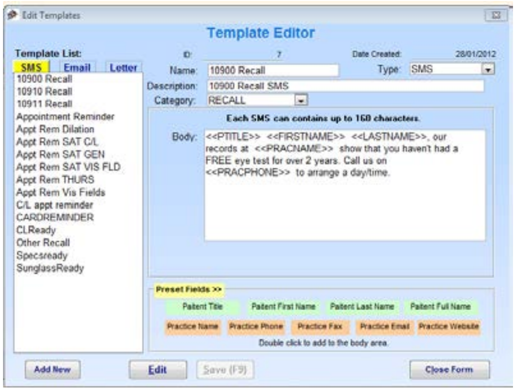
Set up your SMS account &/or settings to send SMS notifications to customers via Ocelot

8. SUPPLIERS



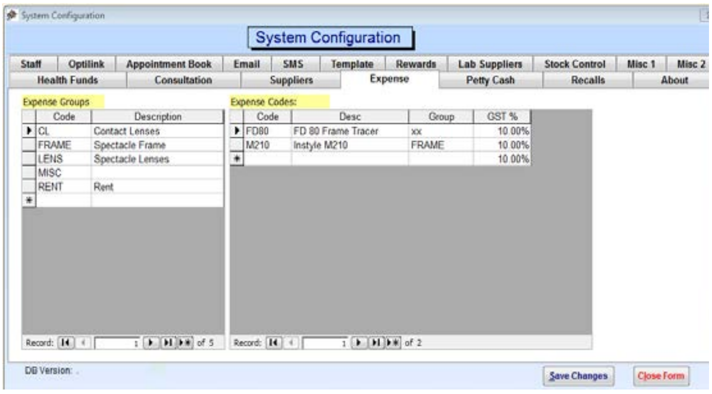
Lists the available supplier categories

9. TEMPLATERS



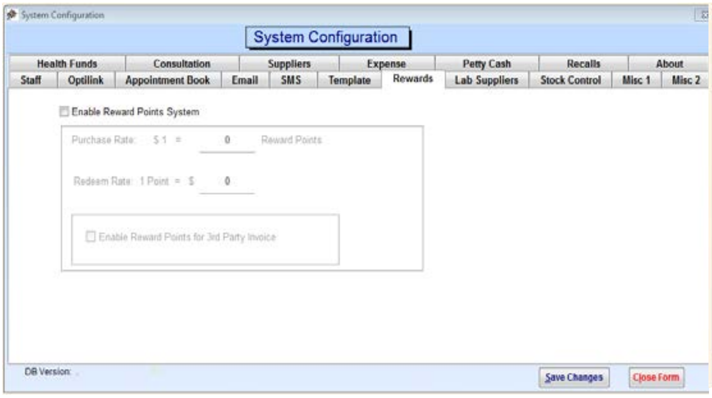
Allows you to create new & edit existing templates used in Email & SMS notifications and letters

10. EXPENSES



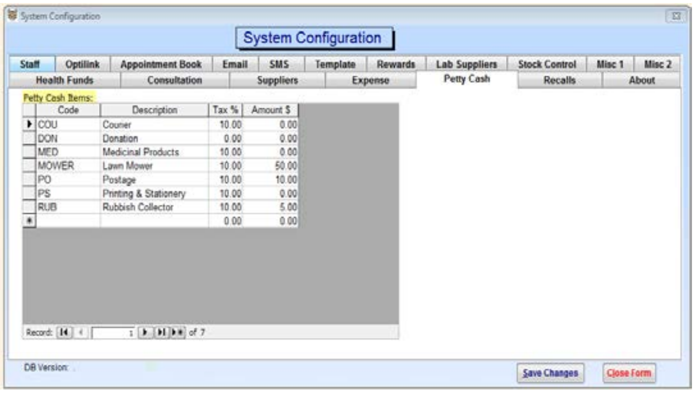
Displays Expense Groups and Codes used for Reporting

11. REWARDS



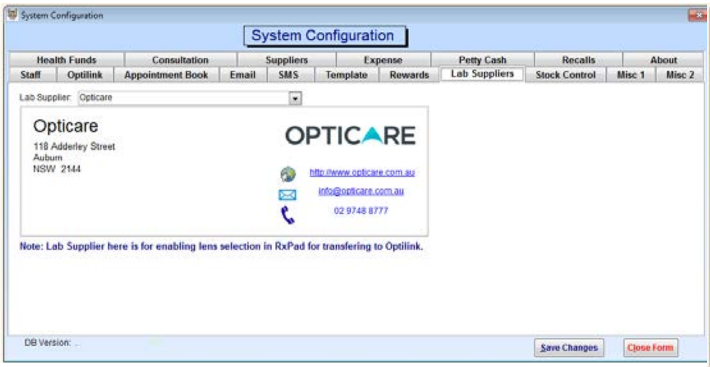
Set up your reward points system

12. PETTY CASH



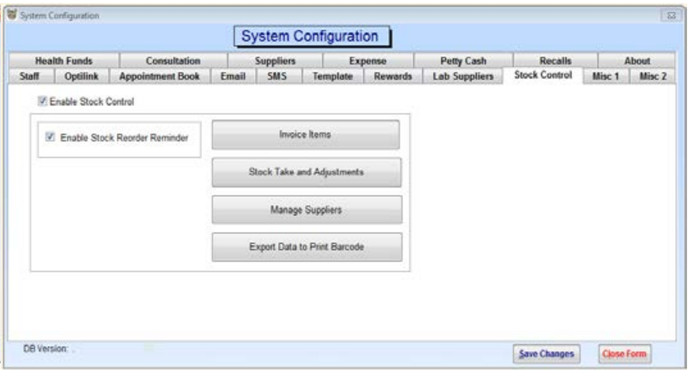
Default items used for the petty cash screen

13. LAB SUPPLIERS



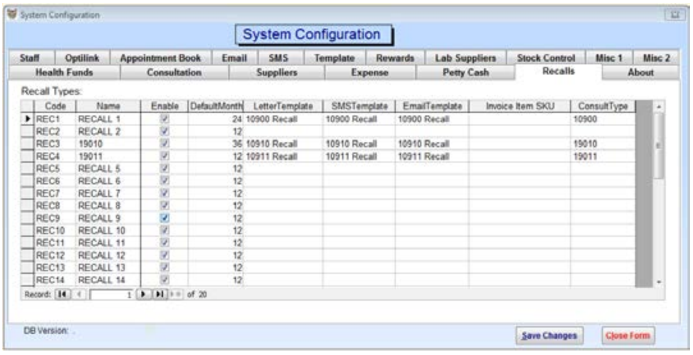
Displays install lab suppliers information

14. STOCK CONTROL



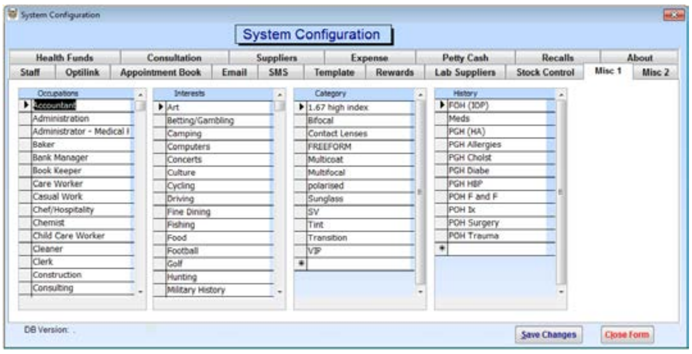
Enable/disable stock control & stock reorder reminders

15. RECALLS



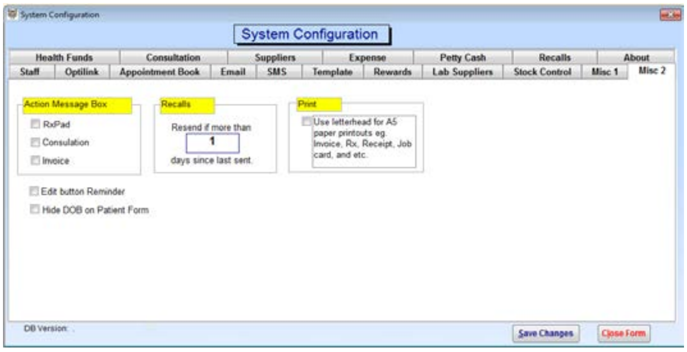
Enables/disables recall settings

16. MISC 1



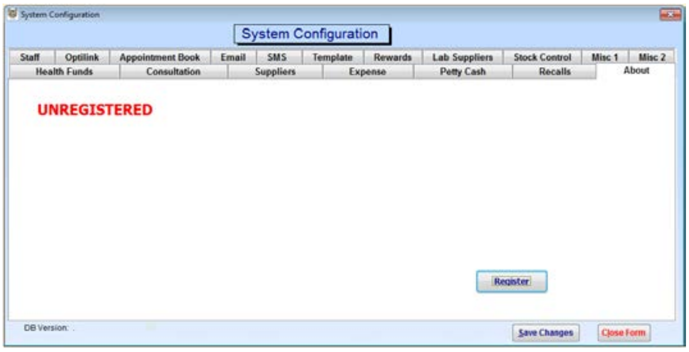
Displays data values used for Marketing (incl. Occupation, Interests, Category, History)

17. MISC 2

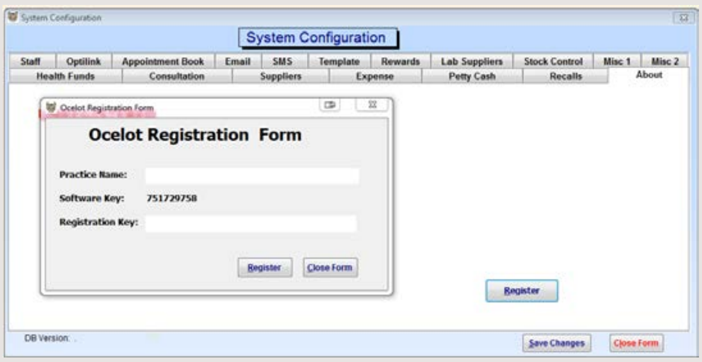


Settings for Print outs, Recall notifications and Action screen behaviours

18. ABOUT



Displays your software registration details. Will display 'Unregistered' if you are using a trial version.



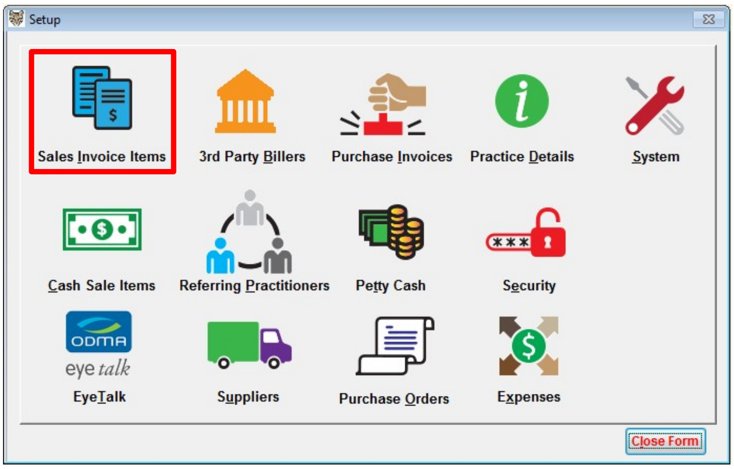
Clicking the Register button allows you to register your trial version of Ocelot.

- If you have your registration details available, enter the required information on the form.
- Then click on the **Register** button.

HINT/TIP:	Offsite software registrations are arranged by **appointment only**. Please contact Opticare Sydney on 1800 251 852 to arrange a time.

Setting up Invoice Items

1. From the Settings screen, click on the **Sales Invoice Items** button.



2. You will find a few example items already entered, you can either delete these or change the details to suit your own requirements.
3. To add new items click the **Add New Invoice Item** button. Enter all the required details. You can scan a barcode label as the Item Code enabling you to scan for the same item when invoicing later. Allocate your item to a group for later reports. *(You can also click on the* **Edit Group** **or** **HF Item Code** **button** *to check and edit details of Groups or Health Fund item numbers).*

HINT/TIP:	When entering the **Sell Price**, the GST amount will be calculated based on the GST Rate set in the **Practice Detail** form. You can also change the GST amount manually. If GST does not apply, tick 'Exempt GST'. The data entered here is called for the invoicing details in Patient Billing.

The **Search Stock** field is a drop down field that allows you to scroll the entered items and select an item. You can also scan a barcode label instead or enter the code allocated to the item.

The stock info area only available when you enable the Stock Control functions in System Configuration screen. For more detail about stock control please refer to the stock control section in this document.

When you see the record navigation buttons at the bottom of the form, you can use it to view records, but do not use it to create a new record. **Always use the Add New (Type of record) button.**

The functions are detailed below:

First Record  Previous Record  Next Record  Last record 

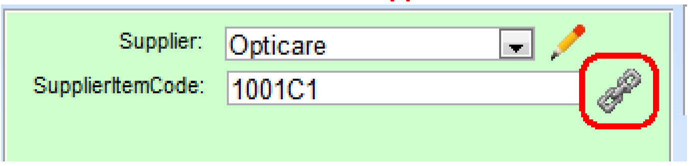
The Menu and Toolbar 

The Print Icon button 

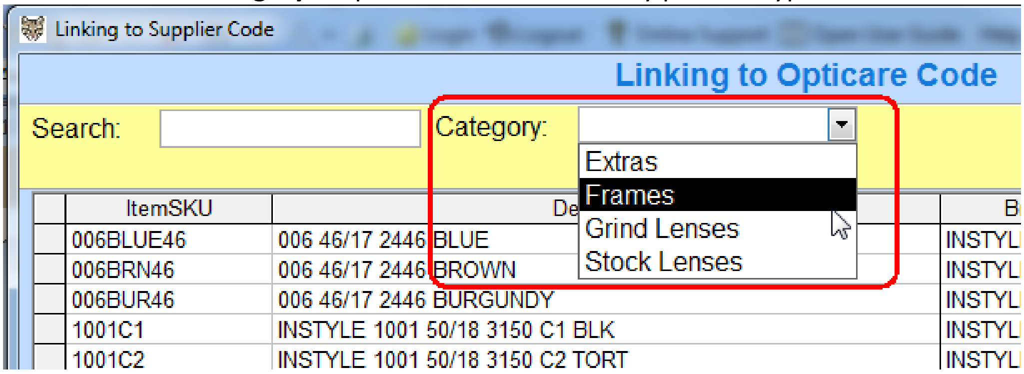
Linking Up to Opticare Item Codes

1. Navigate to the item you'd like to link.

2. Click the **Link** icon next to the **Supplier Item Code**.



3. Search for the item in the popup screen.
   You can use the **Category** dropdown to filter the list by product type.



4. Double-click the selected item. The Supplier Item Code will be updated.

To **remove the link** with Opticare Item Codes, simply **DELETE** the Supplier Item Code.

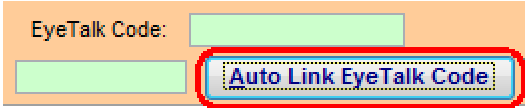
HINT/TIP:	Setting up the Opticare Item Codes in Ocelot is required, and will allow OPTILINK Auto Lens Conversion to work seamlessly.

Linking to Eyetalk Codes

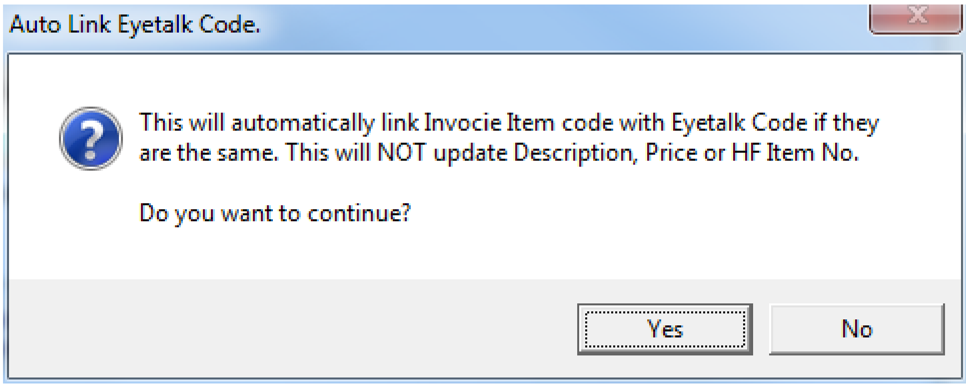
Automatic Linking

NOTE: This function applies ONLY to those items which Sales Item Code is the *same* as the Eyetalk Code.

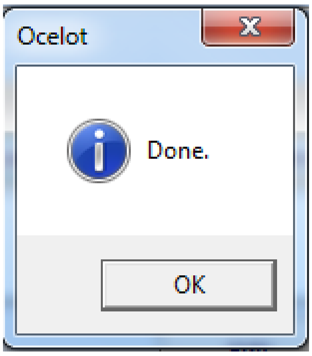
1. To access the **Sales Invoice Items**, click on the **Setup** icon at the main screen.
2. Click on the **Auto Link to Eyetalk Code** button.



3. Click the **Yes** button to continue.

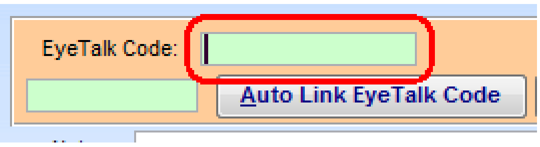


4. A pop up message will display once it's complete.

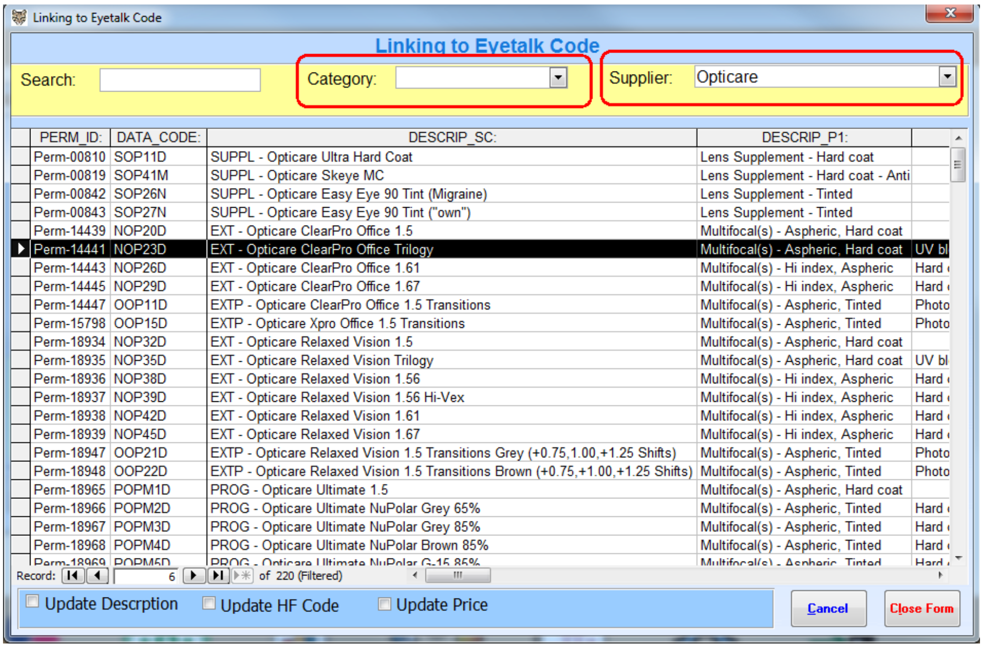


Manual Linking

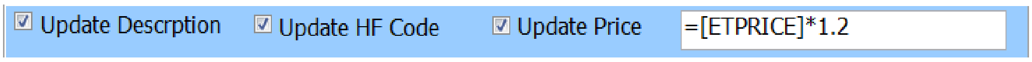
1. Navigate to the Item you'd like to link.
2. Double click the **Eyetalk Code** box.



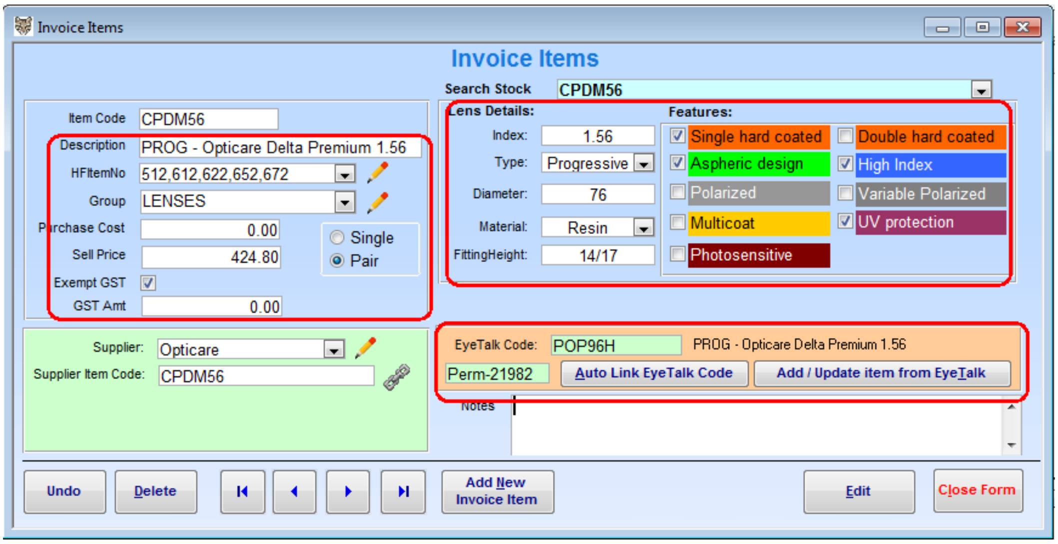
3. Search for the item in pop up screen. You can use the Category and Supplier to filter the list.



4. Tick/Untick the type of information you'd like to update using Eyetalk data.



5. Double click the item to select and apply the changes if anything has been ticked in step 4.

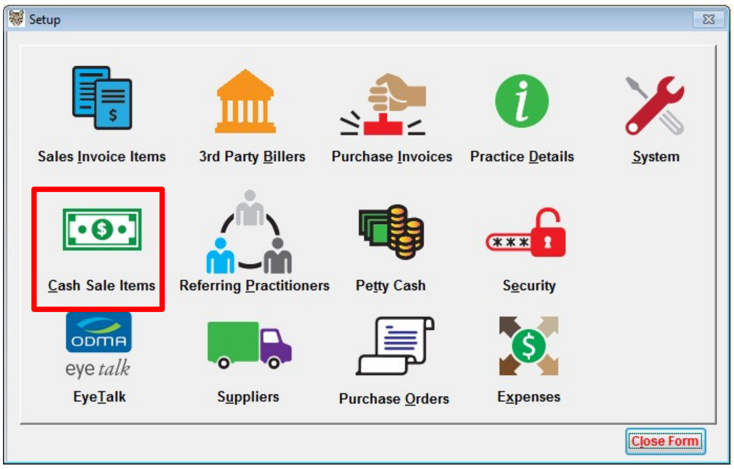


HINT/TIP:	When you tick **Update Price**, the formula must contain [ETPRICE]. The formula can be flexible. *E.g. **[ETPRICE]*1.2** = 20% more of the RRP price* ***[ETPRICE]+12** = $12 added to the RRP price*

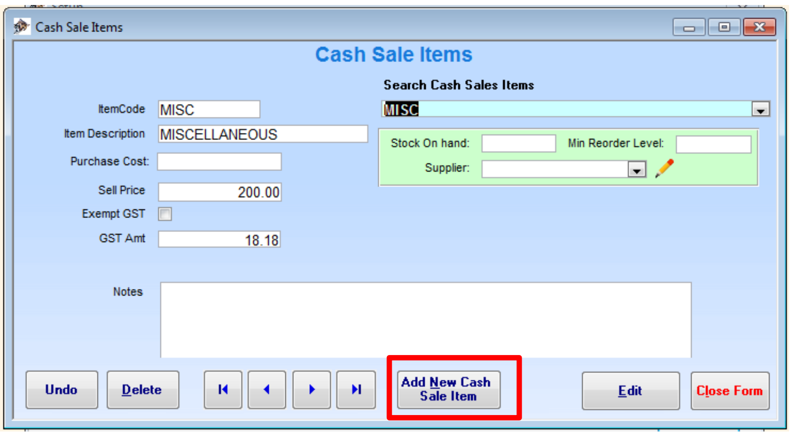
NOTE: The Item Price listed in Eyetalk is for each individual piece. Normally, a spectacle lens item will have two pieces. If the Sales Invoice Item is for a single piece, please choose Single.

Setting up Cash Sale Items

1. From the Settings screen, click on the **Cash Sale Items** button.



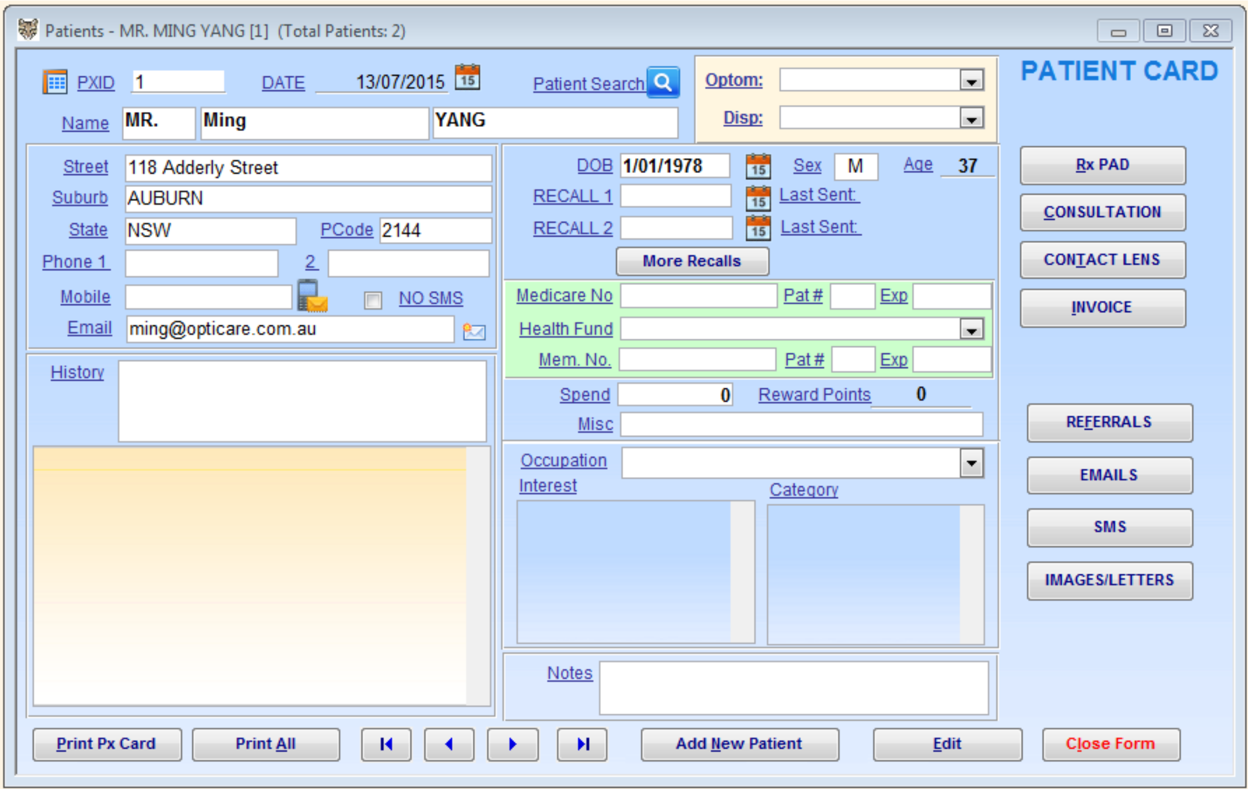
2. You will find a miscellaneous item already entered, you can either delete it or change the details to suit your own requirements.



3. To add new items click the **Add New Cash Sales Item** button. Enter all the required details. If GST is applicable, untick the Exempt GST box.
4. You can scan a barcode label as the Item Code, enabling you to scan the same item when invoicing later. The data entered here is called for the Cash Sales Billing.

4 Using Ocelot: Patients

1. From the Ocelot main screen click the **Patient** button.
2. The Patients Form will open, here you can enter the patient details and recall date.
   Most work will be done from the Patient Card from which you can navigate to the Rx Pad, Consultation, Contact Lens, Invoice *(Patient Billing),* and Referrals forms.



Add New Patient

- To enter a new patient click the **Add New Patient** button. The date will automatically default to the current date. This can be edited if required.
- Enter the required details in the patient's card and click the **Update** button to save the data. If you need to edit the data at a later date you will need to click the **Edit** button togo into edit mode, then update again to save the changes.

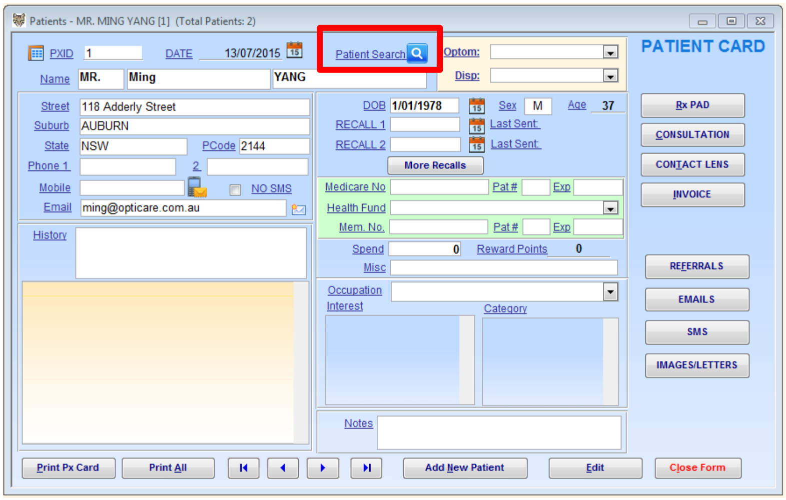
HINT/TIP:	The date for the 10900 Recall field should be **two years** from the last consultation date.

- After updating the data, you can navigate direct to any of the other forms and continue to enter the patient's information.

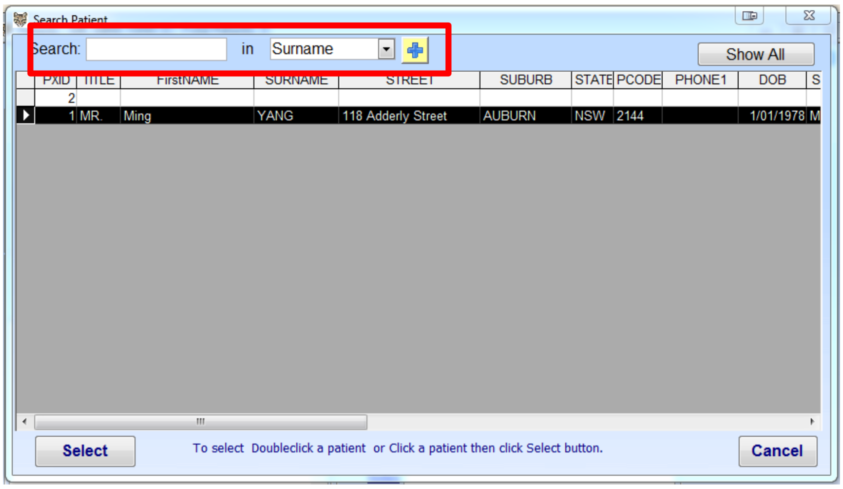
Search for a Patient

When you have several records saved in Ocelot, you can use the search function within the platform.

- In the main Patient Card window, click on the magnifying glass icon 



- You can use the Search bar at the top of the 'Search Patient' window to search using different filters/criteria (ie by Surname, First name, State, etc).

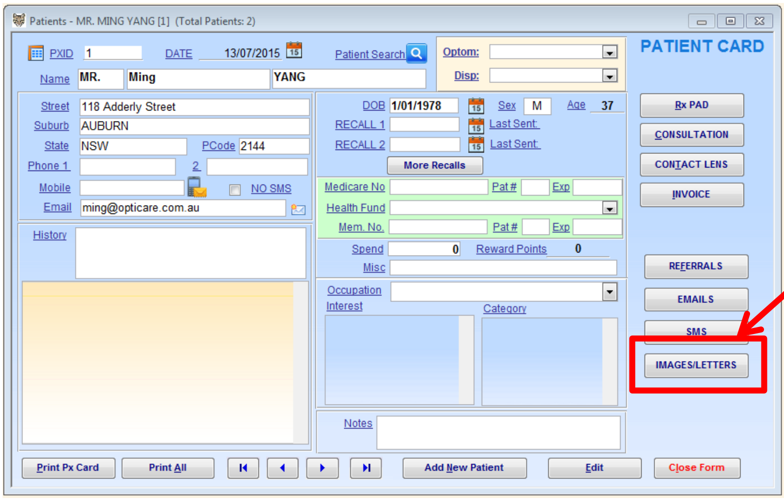


- Click the 'Plus' button  to add more search criteria or click the 'X' button  to remove the additional filter.

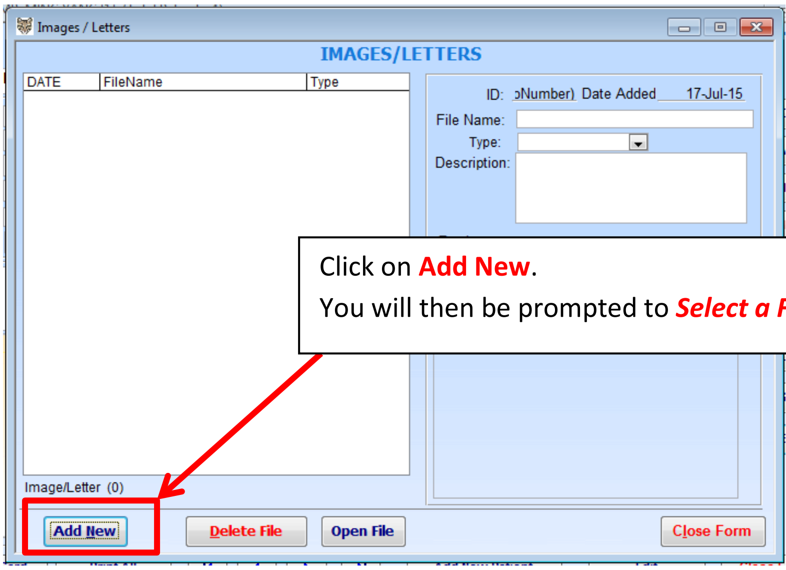
HINT/TIP: 	A maximum of FOUR search criteria can be set.

Attaching Documents or Images

Our latest version of Ocelot includes an attachment function. Practices are able to attach any relevant documentation or images, along with existing Patient information.



To navigate to the Attachments function, click on the **Images/Letters** button

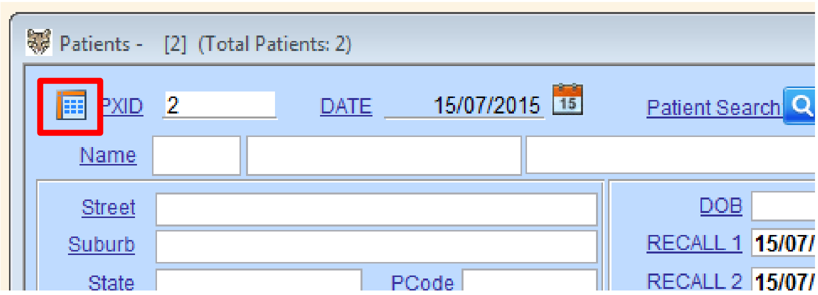


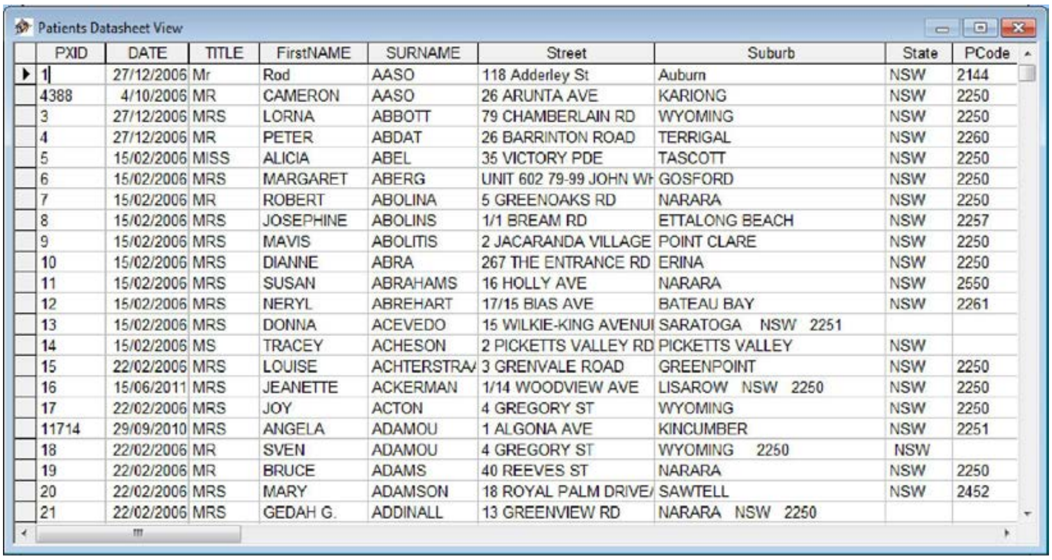
Click on **Add New**.
You will then be prompted to ***Select a File*** from your local computer to add.

HINT/TIP:	The Attachment function only supports the following file extensions:	
	Image Files .JPG .PNG .BMP	**Letter Files** .DOC . TXT .RTF .PDF

View Patient List

The complete patients list can also be viewable as a data sheet by clicking the icon at the top left corner of the patient card (next to the PXID).




Patients Datasheet View

PXID	DATE	TITLE	FirstNAME	SURNAME	Street	Suburb	State	PCode
1	27/12/2006	Mr	Rod	AASO	118 Adderley St	Auburn	NSW	2144
4388	4/10/2006	MR	CAMERON	AASO	26 ARUNTA AVE	KARIONG	NSW	2250
3	27/12/2006	MRS	LORNA	ABBOTT	79 CHAMBERLAIN RD	WYOMING	NSW	2250
4	27/12/2006	MR	PETER	ABDAT	26 BARRINTON ROAD	TERRIGAL	NSW	2260
5	15/02/2006	MISS	ALICIA	ABEL	35 VICTORY PDE	TASCOTT	NSW	2250
6	15/02/2006	MRS	MARGARET	ABERG	UNIT 602 79-99 JOHN WH	GOSFORD	NSW	2250
7	15/02/2006	MR	ROBERT	ABOLINA	5 GREENOAKS RD	NARARA	NSW	2250
8	15/02/2006	MRS	JOSEPHINE	ABOLINS	1/1 BREAM RD	ETTALONG BEACH	NSW	2257
9	15/02/2006	MRS	MAVIS	ABOLITIS	2 JACARANDA VILLAGE	POINT CLARE	NSW	2250
10	15/02/2006	MRS	DIANNE	ABRA	267 THE ENTRANCE RD	ERINA	NSW	2250
11	15/02/2006	MRS	SUSAN	ABRAHAMS	16 HOLLY AVE	NARARA	NSW	2550
12	15/02/2006	MRS	NERYL	ABREHART	17/15 BIAS AVE	BATEAU BAY	NSW	2261
13	15/02/2006	MRS	DONNA	ACEVEDO	15 WILKIE-KING AVENUI	SARATOGA NSW 2251		
14	15/02/2006	MS	TRACEY	ACHESON	2 PICKETTS VALLEY RD	PICKETTS VALLEY	NSW	
15	22/02/2006	MRS	LOUISE	ACHTERSTRA/	3 GRENVALE ROAD	GREENPOINT	NSW	2250
16	15/06/2011	MRS	JEANETTE	ACKERMAN	1/14 WOODVIEW AVE	LISAROW NSW 2250	NSW	2250
17	22/02/2006	MRS	JOY	ACTON	4 GREGORY ST	WYOMING	NSW	2250
11714	29/09/2010	MRS	ANGELA	ADAMOU	1 ALGONA AVE	KINCUMBER	NSW	2251
18	22/02/2006	MR	SVEN	ADAMOU	4 GREGORY ST	WYOMING 2250	NSW	
19	22/02/2006	MR	BRUCE	ADAMS	40 REEVES ST	NARARA	NSW	2250
20	22/02/2006	MRS	MARY	ADAMSON	18 ROYAL PALM DRIVE/	SAWTELL	NSW	2452
21	22/02/2006	MRS	GEDAH G.	ADDINALL	13 GREENVIEW RD	NARARA NSW 2250		

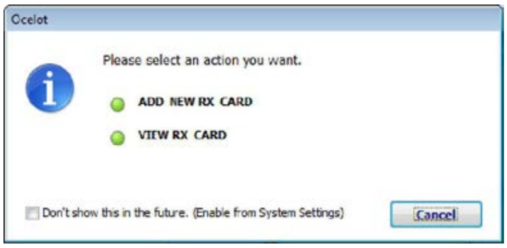
Print Px Card - If your printer is setup to print 6x4" index cards, you have the option of printing a card with basic patient details.

Print All – Prints all patient detail to an A4 page.

RXPad – Creating a new RX Card

To navigate to the **Rx PAD** click the **Rx PAD** button on the Patient Card.

- An action message window will show up allows you to choose your action- **ADD NEW RX CARD** or **VIEW RX CARD**. This action message window can be enabled/disabled in **System Settings** form **MISC** tab.



- **After navigating to the Rx PAD form from the Patient Card it will open the form belonging to the patient.**
  If this is the first Rx PAD entry for the patient the fields will be blank awaiting new details (eg. RxID: (AutoNumber)), if it is not the first entry the details of the last Rx will be shown.
- **Click the Add New Rx Card button to create a new Rx record.** The date will automatically default to the current date, this can be edited if required, you must select **Disp By** *(dispensed by)*, and an RxID will be automatically allocated.
- **You can then enter the rest of the required information – simple tab *(or click)* and type.** If you already have a record entered, click the **Add New Rx Card** button to create a new Rx record.
- You can view Rx PAD forms by the date entered by selecting the **View By Date** drop down field and selecting the required date.

- Details can also be entered to provide a quotation for the job and print the quote if required. This information can be used to automatically create an invoice if desired by clicking the **Create Invoice** button.

HINT/TIP:	Always update any entries and changes with the **Update** button. Editing is the same process as detailed for Patients.

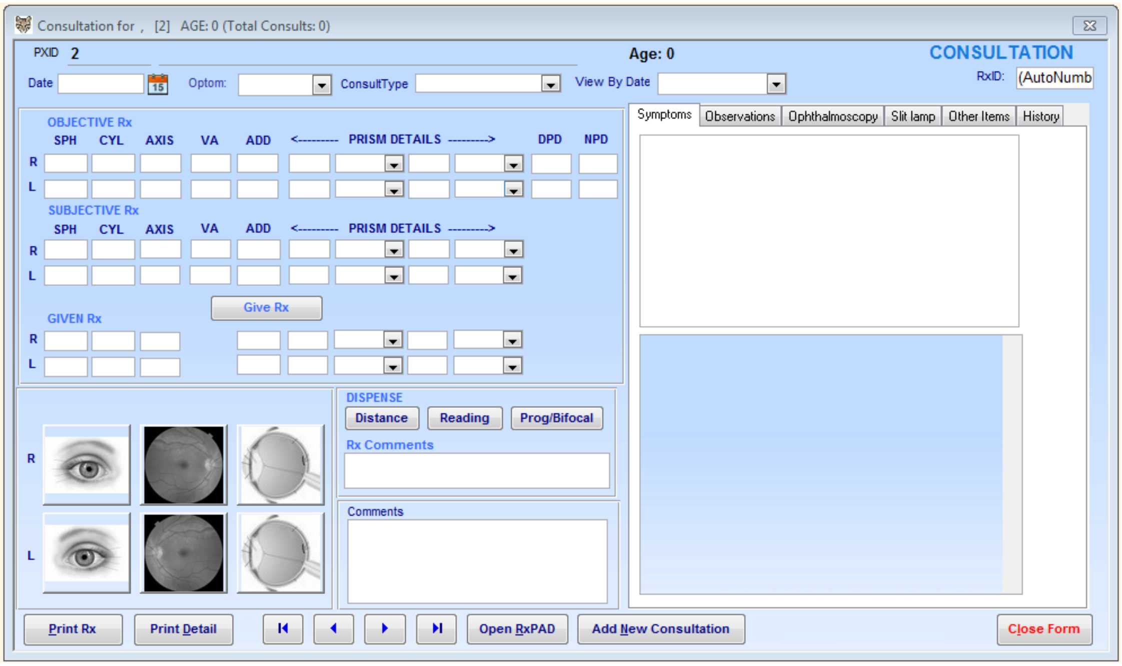
- You can select Lab Supplier's lens or extras by clicking the search button next to Lens Type or Extras.
- Selecting **Print Jobcard** previews the jobcard form, if you are happy with the detail you can then print the form by clicking the print icon on the toolbar *(or selecting File – Print from the File menu)* for forwarding to the laboratory or processing internally. NOTE: The printout is set to A5 paper.
- Selecting **Optilink Desktop** or **Optilink Online** will transfer job data to Optilink.

Consultation

- To navigate to the Consultation screen, click the **CONSULTATION** button on the PATIENT CARD.
- After navigating to the Consultation form from the Patient Card, it will open the form relating to the patient. If this is the first consultation entry for the patient, the fields will be blank. If not – the details of the last consultation will be displayed.

Add New Consultation Record

- Click the **Add New Consultation** button to create a new Consultation record.
  The date will automaticallydefault to the current date. This can be edited if required - you must select **Optom** and a consultation RxID will be automatically allocated.
- You can then enter the rest of the required information – simply tab *(or click)* and type.

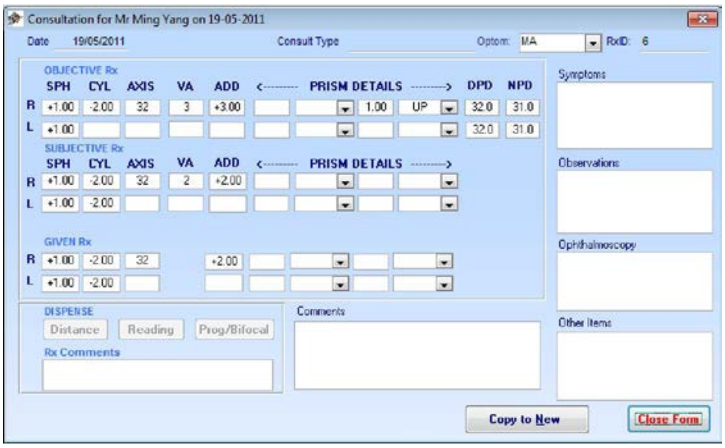


- If you already have a consultation record entered you click the **Add New Consultation** button to create a new consultation record.
- You can enter an OBJECTIVE Rx if required - the PD detail then do a subjective Rx.
- After entering a SUBJECTIVE Rx, it can be transferred to the GIVEN Rx by clicking the **Give Rx** button. Any detailsrequiring alteration can then be made in the GIVEN Rx fields.
- After updating the data, the GIVEN Rx details can be transferred to the Rx PAD as distance and/or reading or multifocal.

HINT/TIP:	Always update any entries and changes with the **Edit/Update** button.

View Patient RX & Consultation Forms

- To view current patient's Rx PAD forms, click the **Open RxPad** button. This saves time instead of closing the form, then navigating to Rx PAD forms from the **Patients** screen.
- You can view consultation forms (will open in another screen) by the date entered by selecting the **View By Date** drop down field and selecting the required date.
- Create a new consultation by clicking **Copy To New** button. It will copy the Subjective RX and Given RX information across.



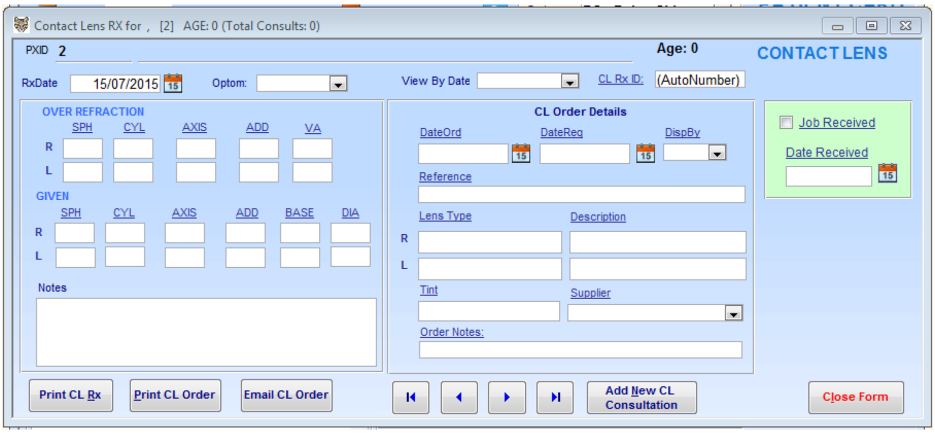
- **Print Rx** - previews the prescription details print for issuing to the patient. This print includes the Rx comments. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.
- **Print Detail** - previews the patient consult details print prior to printing a hardcopy record if required. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.

Contact Lens

- You can navigate to the **CONTACT LENS** form from the **Patient Card** or directly from the **Consultation Form**. It will open the form belonging to the patient.
- The CONTACT LENS form is a combined consultation and dispensing form **CL Rx/DISP**. If this is the first consultation entry for the patient, the fields will be blank and awaiting new details. If not, details of the last consultation will be displayed.

Create New Contact Lens Consultation Record

- Click the **Add New CL Consultation** button to create a new CL Consultation record. The date will automatically default to the current date. This can be edited if required.
- You must select **Optom** and a consultation CL RxID will be automatically allocated. Then enter the rest of the required information – simply press **TAB** *(or click)* and type.



- If you already have a consultation record entered, click the **Add New CL Consultation** button to create a new consultation record.

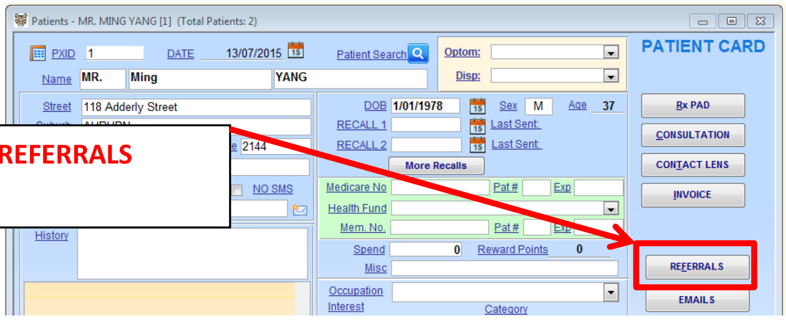
  You can view consultation forms by the date entered by selecting the **View By Date** drop down field and selecting the required date.
- After entering OVER REFRACTION details, they can be transferred to the GIVEN details by clicking the **Give Rx** button. Any details requiring alteration can then be made in the GIVEN fields.

HINT/TIP:
Always update any entries and changes with the Edit/Update button.

- Selecting **Print CL Order** previews the contact lens order. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* The form can then befaxed to your supplier. NB: The printout is set to A5 paper.
- Selecting **Print CL Rx** previews the prescription details print for issuing to the patient. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the Filemenu).* NB: The printout is set to A5 paper.

Referral Letter

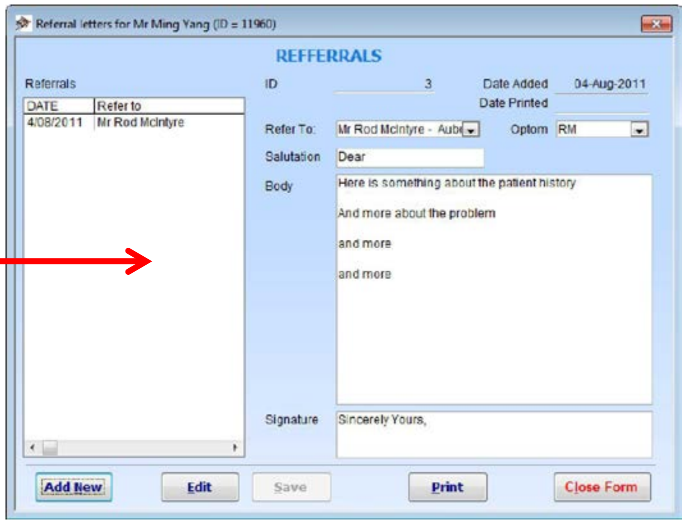
To navigate to the **REFERRAL** form, click the **REFERRALS** button on the PATIENT CARD.



It will open the form belonging to the patient.

If this is the first referral entry for the patient, the fields will be blank awaiting new details.

If not - the details of the last referral will be shown.



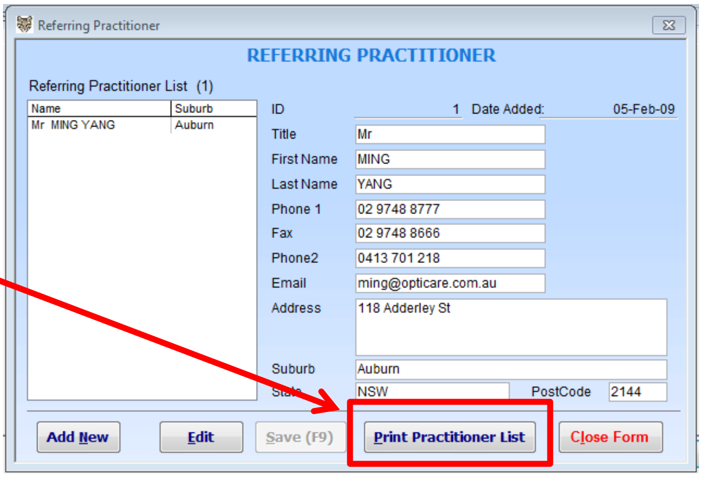
- If it is the first entry, the date will automatically default to the current date. This can be edited if required.
- You must select the **Refer To** and **Optom** details, and a referral ID will be automatically allocated.
- Enter in the remaining required information – simply press TAB (or click) and type.
- If you already have a referral letter record entered, click **Add New** button to create a new one.

HINT/TIP:	Always update any entries and changes with the **Edit/Save** button.

Editing Practitioners List

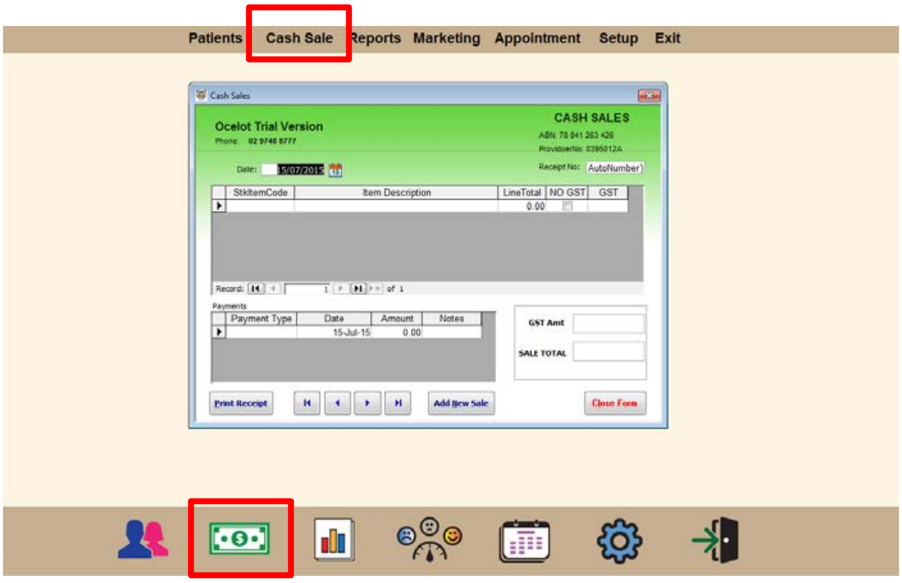
1. To edit Practitioners in **Refer To** selection, click the **Referring Practitioner** icon in SETUP.

2. You can print Referring Practitioner list by clicking the **Print Practitioner List** button.



5 Cash Sales

The CASH SALES form is accessible from the main screen by clicking either the **Cash Sales** link or icon.



Create a New Cash Sale

- Click **Add New Sale** button. The Date details and Receipt No will be automatically allocated after doing so.
- Enter in the rest of the required information. Cash Sales can also accept freehand data.
- If you wish to modify default data, just press **TAB** (or click) and type whatever you wish.

HINT/TIP:	**GST is allocated by default.** If an unusual occurrence arises and you are selling an item where GST does not apply - click the NO GST checkbox and the GST will not be charged

Reverse a New Cash Sale

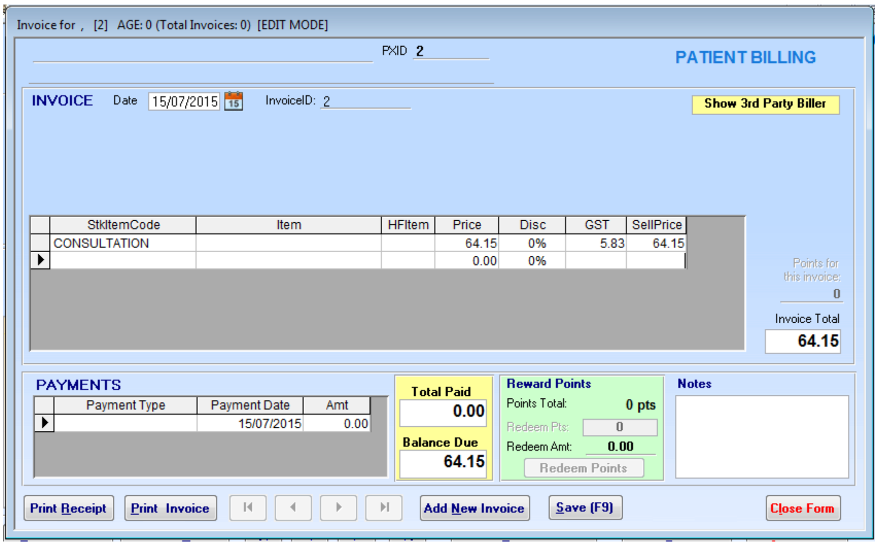
- To reverse a cash sale, enter details such as "Sale Cancelled" and enter a minus amount, or simply delete the record.
- If you reverse the detail, a record will be kept. If you delete the record, no record is kept when you print a Cash Sales Summary. The record number will be also be missing. Records can also be edited later if required.
- Selecting **Print Receipt** previews the receipt details prior to printout.
  If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).*

NOTE: The printout is set to A5 paper.

6 Invoices

Invoicing - Patient Billing

- To navigate to the **PATIENT BILLING** form, click the **INVOICE** button on the PATIENT CARD.
- It will open the form belonging to the patient. If this is the first billing entry for the patient, the fields will be blank awaiting new details. If not, the details of the billing entry will be shown.
- Click the **Add New Invoice** button to create a new Invoice record. The date will automatically default to the current date. This can be edited if required, and an Invoice ID will be automatically allocated.
- You can then enter the rest of the required information – simply **TAB** *(or click)* and type



- The invoice area allows you to choose sale items from a drop down combo in the Stock Item field
- You can either select from the drop down, or enter the stock ID code or scan from a barcode label. Barcode labels will only work if you have scanned the barcode into the Item Code field when entering invoice items.

HINT/TIP:	All fields can be edited and the GST will be automatically recalculated if required. Invoices can also be deleted via the file menu. Always update any entries and changes with the **Edit/Update** button.

Print Invoice

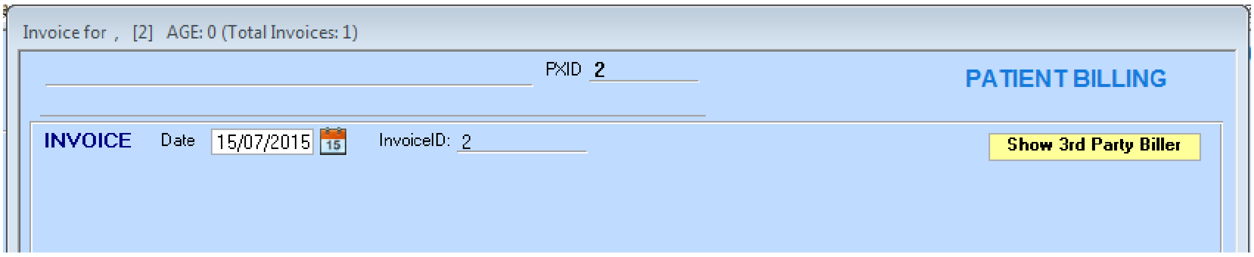
Selecting **Print Invoice** previews the Invoice/receipt. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NOTE: The printouts are set to A5 paper.

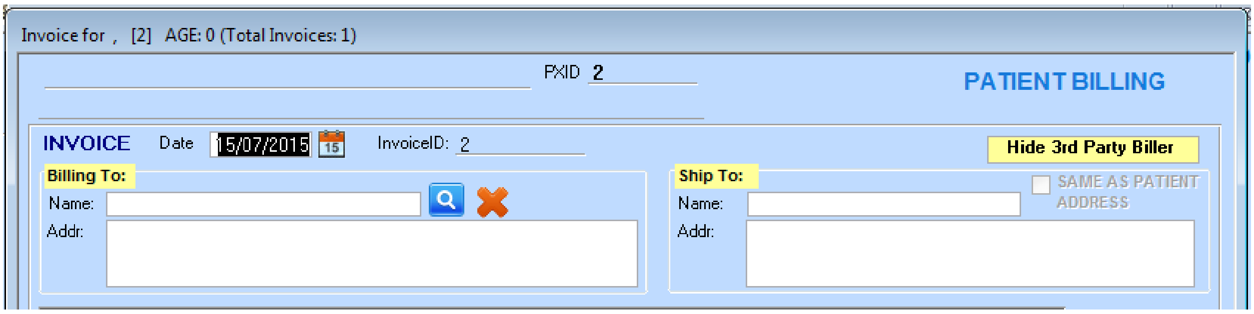
Print Receipt

The print receipt function allows for receipting part payments for lay-by, deposits etc.
The Invoice/Receipt can be printed after full payment has been received.
Selecting **Print Receipt** previews the receipt. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NOTE: The printouts are set to A5 paper.

Invoicing - Third Party Biller

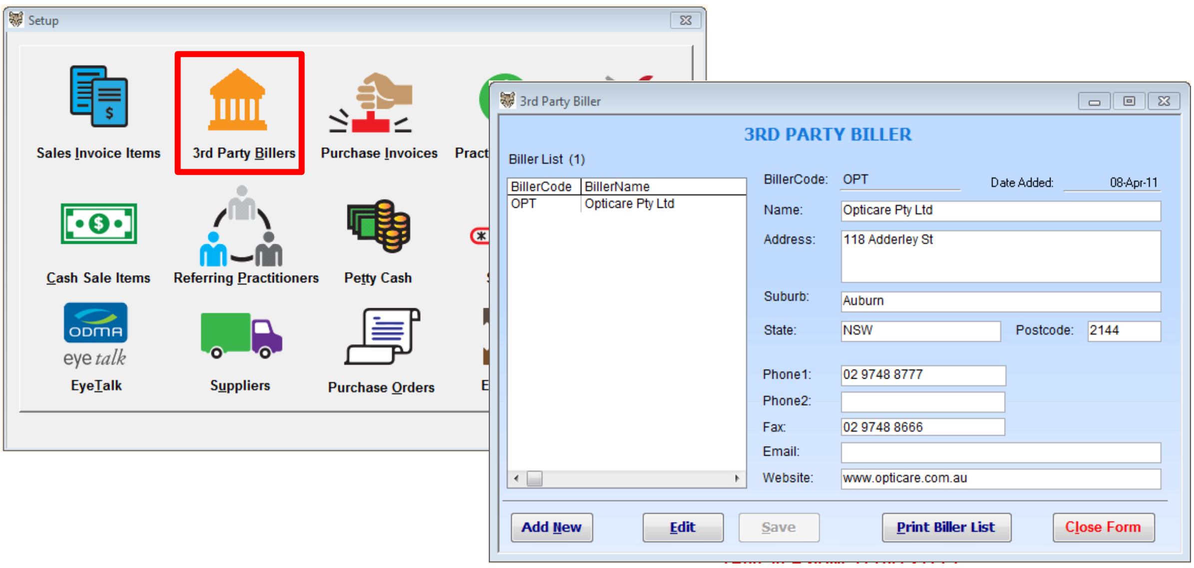
- To use 3rd Party Biller, click **Show 3rd Party Biller** button in the **Invoice** screen.
- Then click the **Search Biller** icon to find the correct biller.
- To CLEAR Biller, click the **Clear Biller** icon. **NOTE:** 'Hide 3rd Party Biller' button will **NOT** clear biller info.





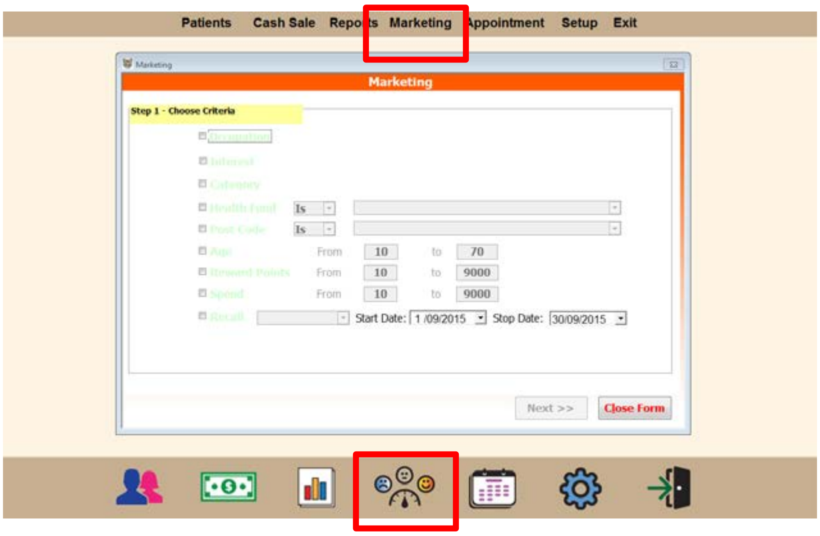
HINT/TIP:	If a 3rd **Party Biller** is selected, the Invoice & Receipt printout will default to **A4** (instead of A5).

- To edit a Third Party Biller, click the 3rd **Party Billers** icon in Setup and make the necessary changes.



7 Marketing

The **MARKETING** module is accessible from the main screen by clicking either the **Marketing** link or the icon.

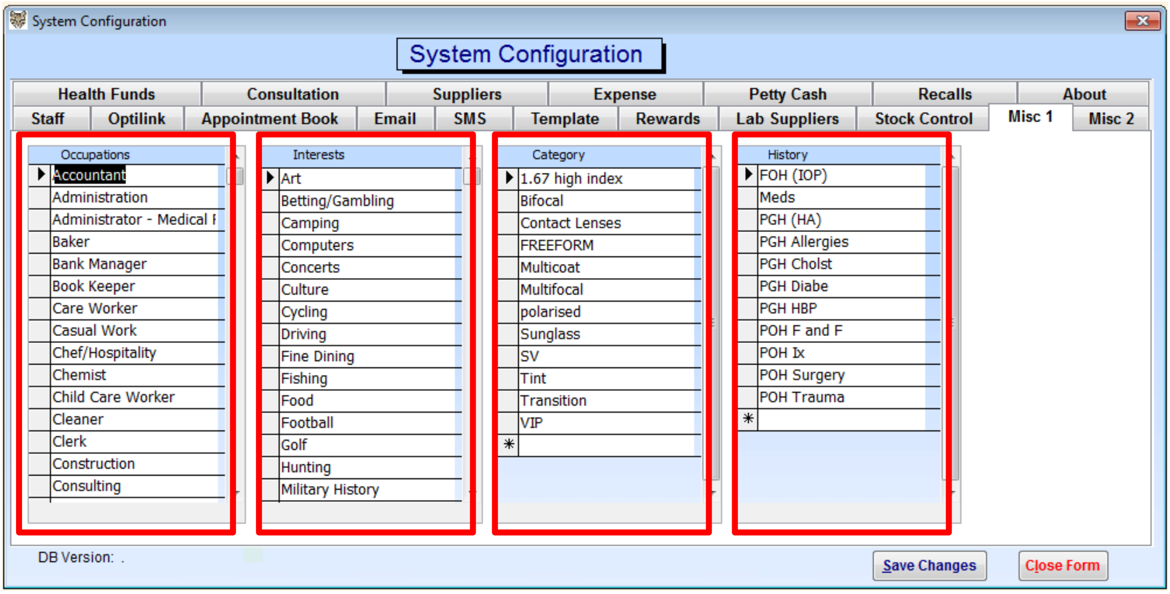


Patient Groups

- To edit the existing Marketing data, go to **Setup > System Configuration**
- Click on the **Misc 1** tab

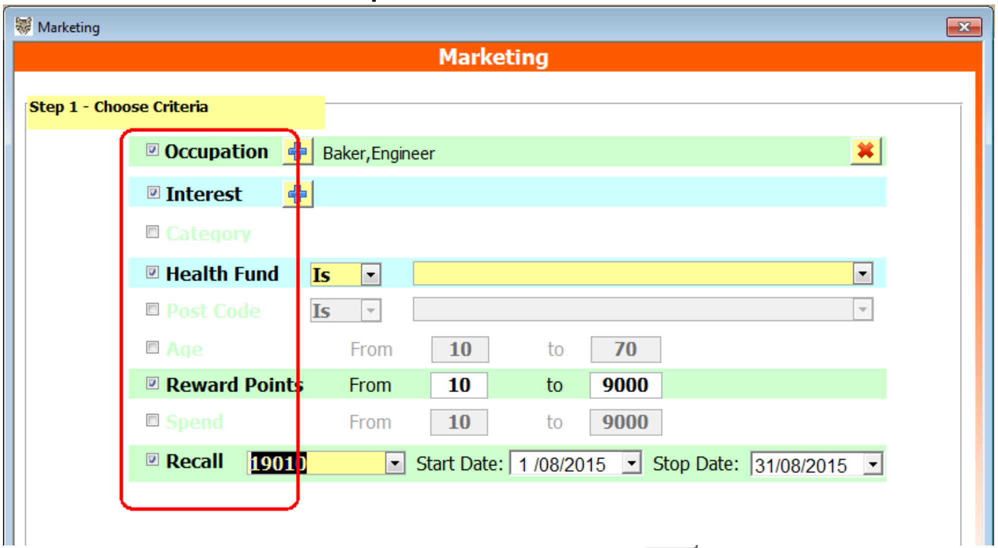
  From here, you can edit/setup Occupations, Interests, Category and the History of your patients.

  This will allow you to group/tag patients in a more segmented way. It will aid you in generating marketing lists that are more targeted to the clients' needs and requirements.



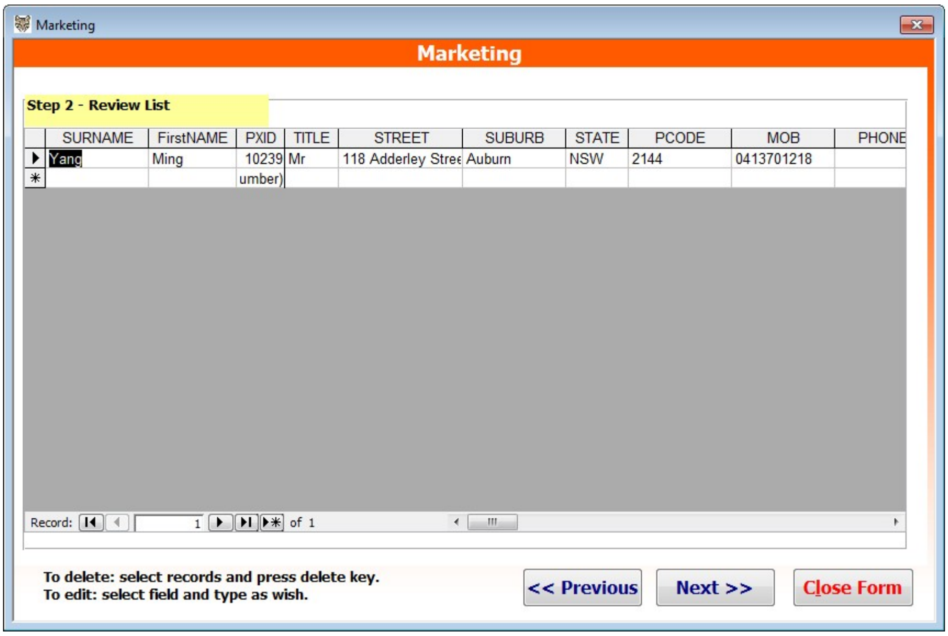
Generating Marketing Lists

- From the main screen, click on the Marketing icon/link
- Tick one or more criteria in **Step 1 – Choose Criteria**



- To add more options to the selected criteria, click the  button. To remove options, click the  button. Click **Next >>** to advance to the next step.

1. **Review your Patients List**. Delete any patients that you wish to exclude from the list. Then click **Next >>** to continue.



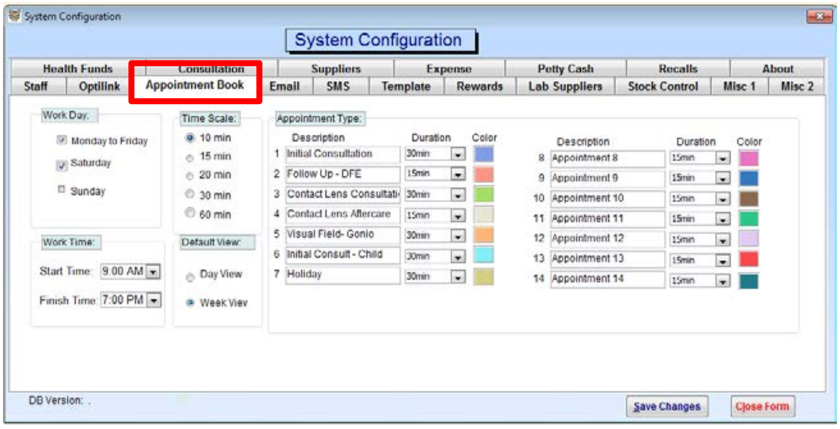
2. **Choose Delivery Method and Template**. Once you have made your selection and uploaded any new templates (if any) , click the **Next >>** button.

HINT/TIP:	**Your Patients List can be exported into a spreadsheet by selecting:** ***Export to CSV*** **or** ***Export to Excel.***

8 Appointments

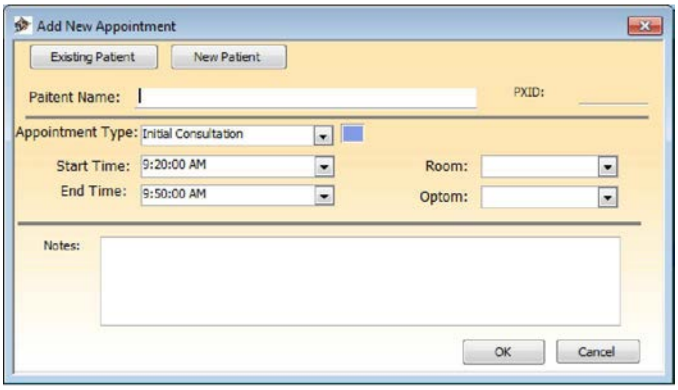
The appointment book is accessible from the main screen by clicking the **Appointment** link or icon.

Setting up your Appointment Book



1. In the System Configuration screen, select the '**Appointment Book**' tab.
2. Ensure you modify/update your settings as required.

Create an Appointment

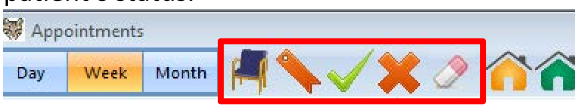


1. In the **Appointments** screen, double click on a select date time range
2. An **Add New Appointment** screen will pop up
3. Click **Existing Patient** to find a patient or click **New Patient** to add a new one
4. Select **Appointment Type**. Then Room, &/or Optom (if you have more than one)
5. Then click the **OK** button to add

Delete or Reschedule an Appointment

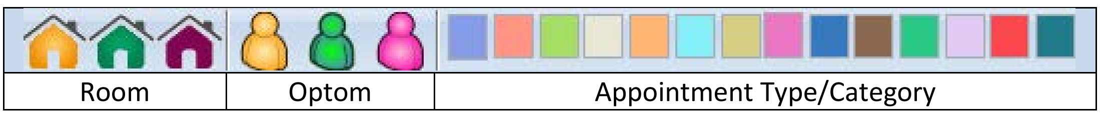
1. To **DELETE** an Appointment, select the entry & press **DELETE** on your keyboard.
2. To **RESCHEDULE** an Appointment, simply click the entry on the Appointment Book and drag it to the correct date/time.

3. To **CHANGE Appointment Status**, select the relevant **status icons** from the top toolbar to indicate the patient's status.



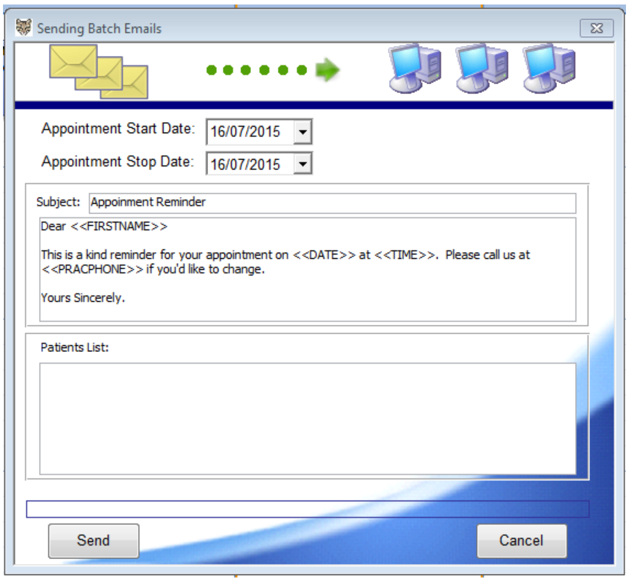
Modify An Appointment

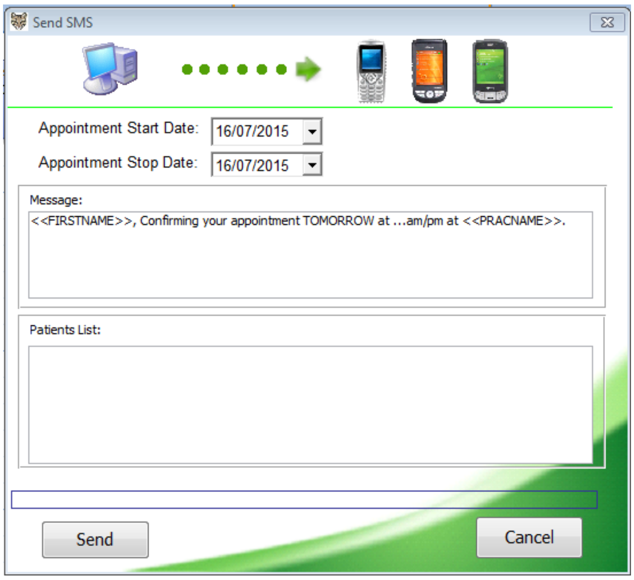
1. Select an appointment, then double click to open **Edit Appointment** screen.
   Alternatively, if you just want to change appointment type, room, or optom, click on the icon from the tool bar atthe top of the **Appointments** screen.
2. You can also press the **F2** key on keyboard to do a quick edit of the appointment subject.



Sending Batch Reminders

1. Click  Email icon or  SMS icon from the top tool bar and follow the prompts.





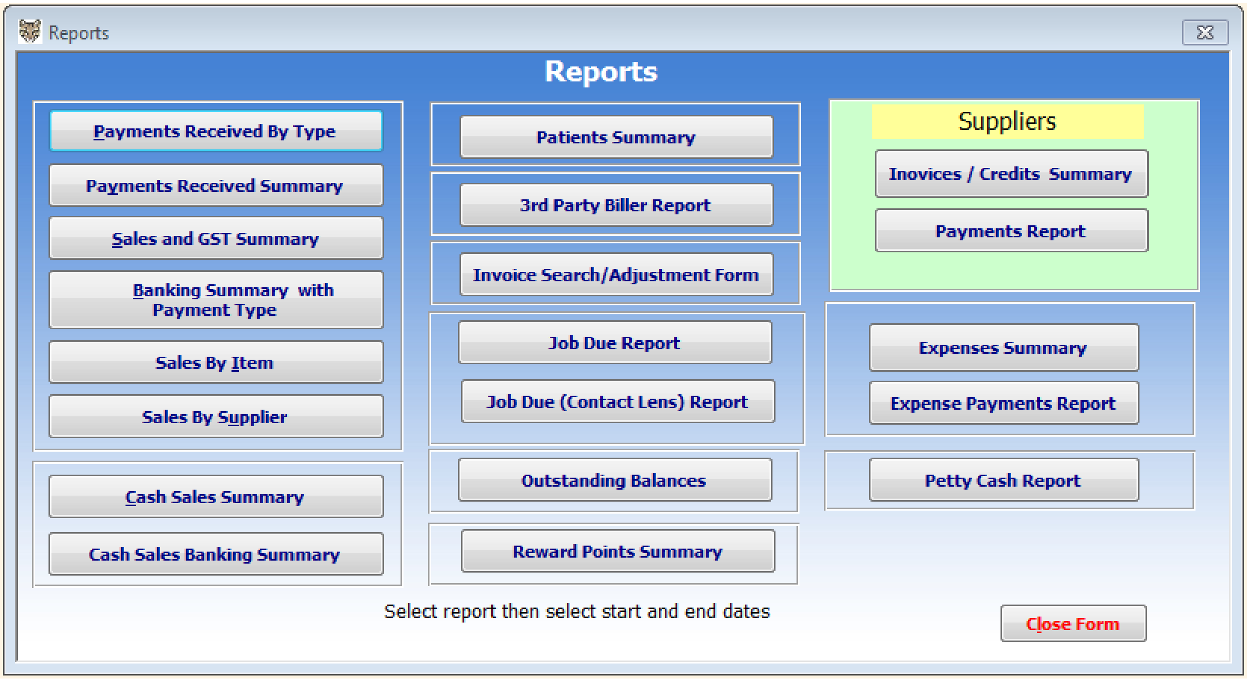
Sending Patient Email, SMS or Open Patient Card

1. Select an appointment
2. Click on one of the icons you want

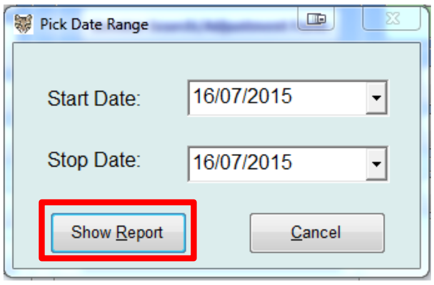
Some icons may not appear if the patient's relevant information is not available.

9 Reports

Reports are accessible from the main screen by clicking the **Reports** link or icon.



- All reports will present you with a pop-up window to specify a date range. Simply select the dates required and then click on **Show Report**.
- A report will then be generated, gathering the information entered between your two specified dates.



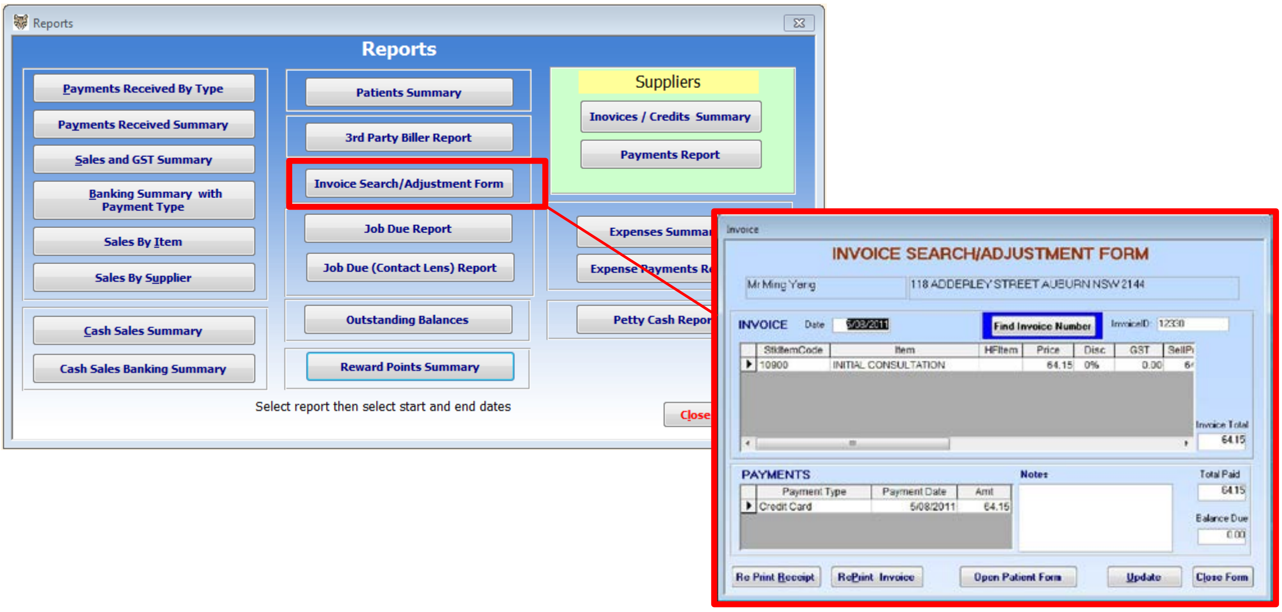
Overview of Available Reports

The list of current Reports that can be generated in Ocelot include the following:

Report	Details	Default Print Setting
Payments Received By Type	Payments receipt between the chosen dates – sorted by payment type	A4
Payments Received Summary	Summary of Payments Received	A4
Sales and GST Summary	Summary of Sales including GST	A4
Banking Summary with Payment Type		
Sales By Item	Items Sold – sorted by Item (ie. Frames, Lenses)	A4
Sales By Supplier	Sales By Supplier. Can also specify individual supplier using the Filter option	A4
Cash Sales Summary	Summary of Cash Sales including GST & Total Amount.	A4
Cash Sales Banking Summary	Summary of Cash Sales Payment Dates & Totals	A4
Patients Summary	Summary of Patient Information incl. Contact Details, Reward Points, Latest Payment, Invoice & Consultation Information	A4
3rd Party Biller Report	Generates Billing Info for 3rd Party Suppliers	A4
Invoice Search/Adjustment Form	Can search based on Invoice # and amend existing Invoices	A4
Job Due Report	Summary of jobs due for RX Jobs	A4
Job Due (Contact Lens) Report	Summary of Jobs due for Contact Lens jobs	A4
Outstanding Balances	Displays current Patients with relevant Invoice ID and Totals owing	A4
Reward Points Summary	Summary of patients and current total reward points	A4
Invoices/Credits Summary	Summary of Invoices/Credits for Suppliers	A4
Payments Report	Summary of Payments made to Suppliers	A4
Expenses Summary	Report of Expenses to the Practice	A4
Expense Payments Report	Report of Payments made for Expenses	A4
Petty Cash Report	Report of Petty Cash for the Practice	A4

Global Invoice Search/Adjustment

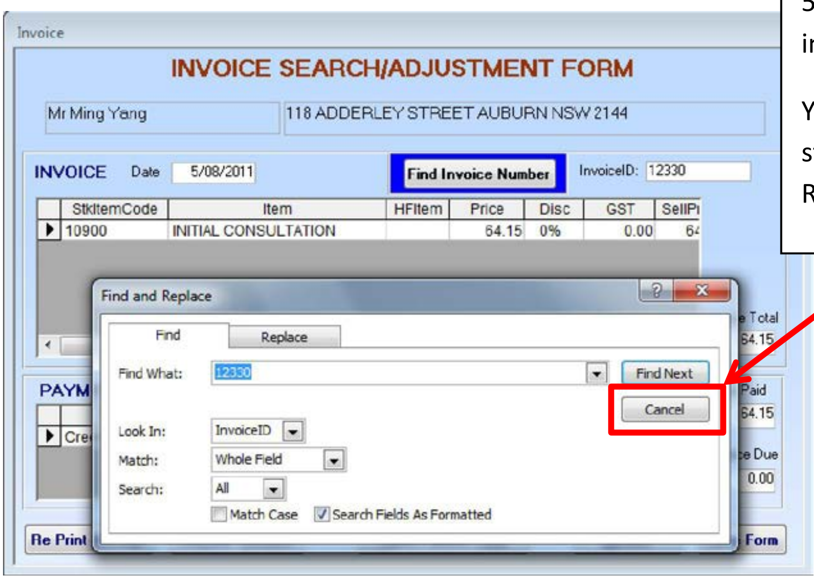
1. This option can be accessed from the reports screen by clicking the **Invoice Search / Adjustment Form** button.



2. To search or adjust an **Invoice** the first thing you must do is click the **Find Invoice Number** button.
3. The **Find and Replace** screen will show on the screen and the cursor will be focused in the 'Find' box.
4. Enter in the **Invoice ID** for an invoice you're looking for, and click the **Find Next** button.
   (1 is the Invoice ID used in this search example.)

5. After locating the required invoice, click the cancel button.

You can edit the form as per the standard invoice screen, (including Reprinting if necessary)

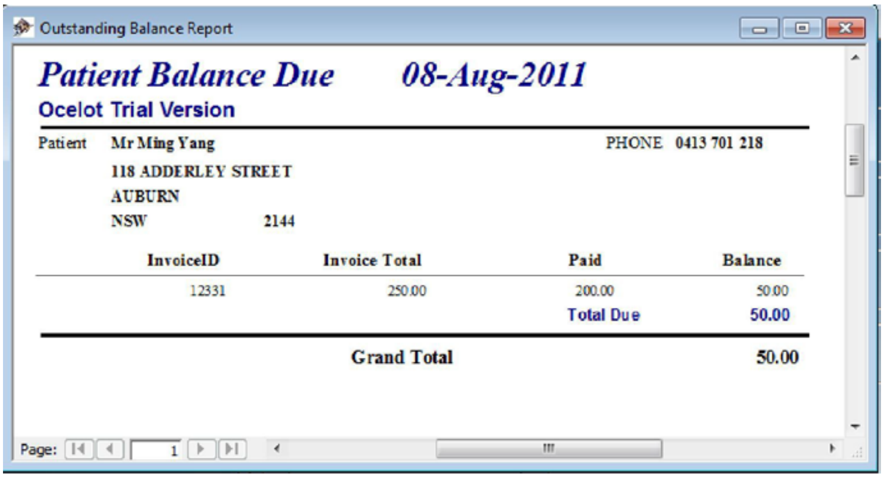


Outstanding Balances Report

1. The Outstanding Balances Report shows details of any outstanding accounts.

2. If no amounts are owed, the report will not proceed and displays the message below. This report is an automatic one-click process.

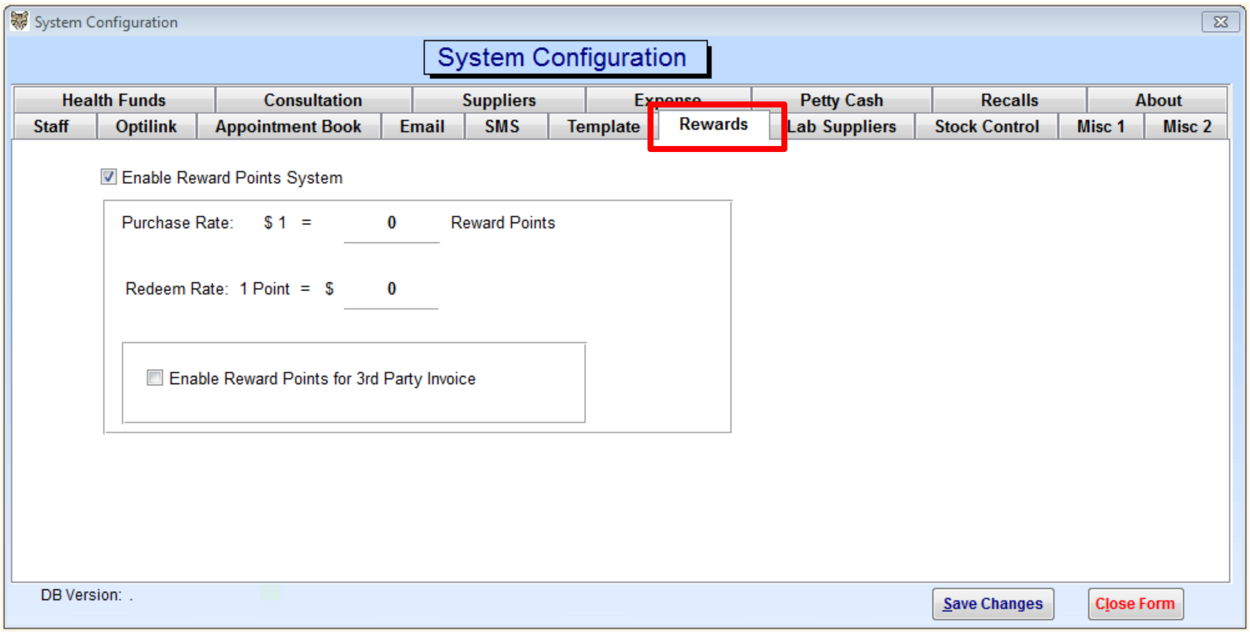
3. If there are any amounts owing, they will be displayed as below:



9 Reward Points

To access the Reward Points settings, you will need to:

1. Click on the **Setup** link or icon from the main screen
2. Click on **System**
3. Then click on the **Rewards** tab in System Configuration

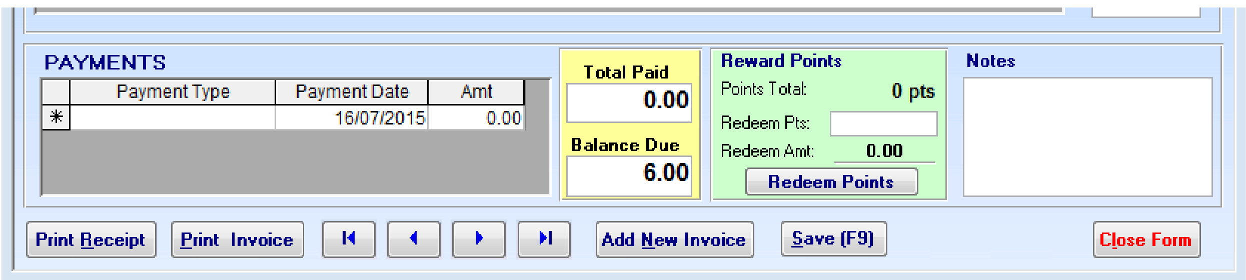


4. You can choose to enable/disable the Reward Points system, setup reward rates and enable/disable reward points for 3rd Party Invoices.

5. In the Invoice **screen**, when reward points is enabled, loyalty points are calculated each time an invoice item is selected and price is updated.

HINT/TIP:	The reward points will **NOT** be counted towards a patient's total points until the invoice is **fully paid**.

6. To redeem points enter the total number points the patient wants to redeem in the green area of the invoice, then click on the **Redeem Points** button.

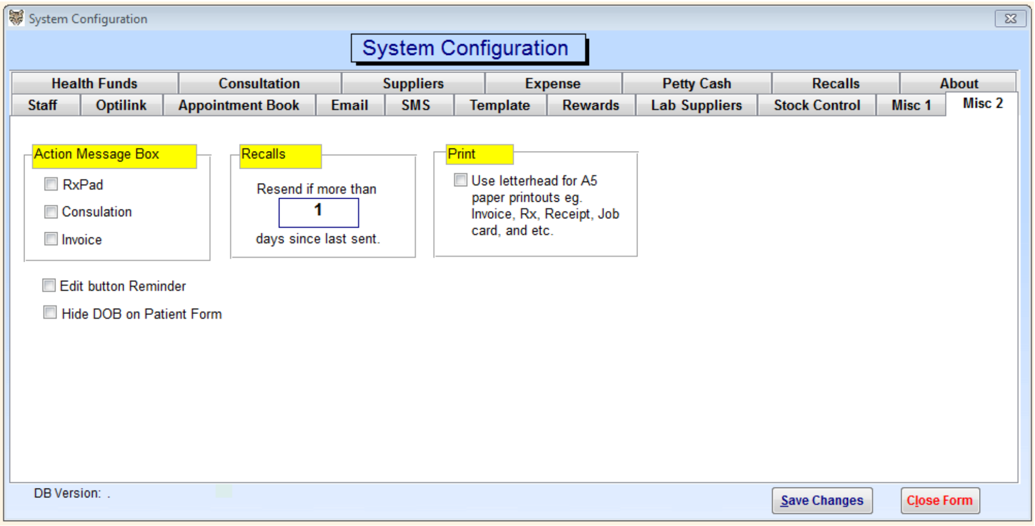


10 Recalls

In the **System Configuration** screen, click on the **Misc 2** tab to modify recall settings & specify a Recall Period.

This allows you to resend any recalls to patients who haven't visited you since the last one was sent. It also gives you the ability to send a one-off notification (either via SMS, Email or Letter) to a patient in a limited period of time.

This will minimize your running cost, as well as maximize your practice's exposure amongst your customer base.

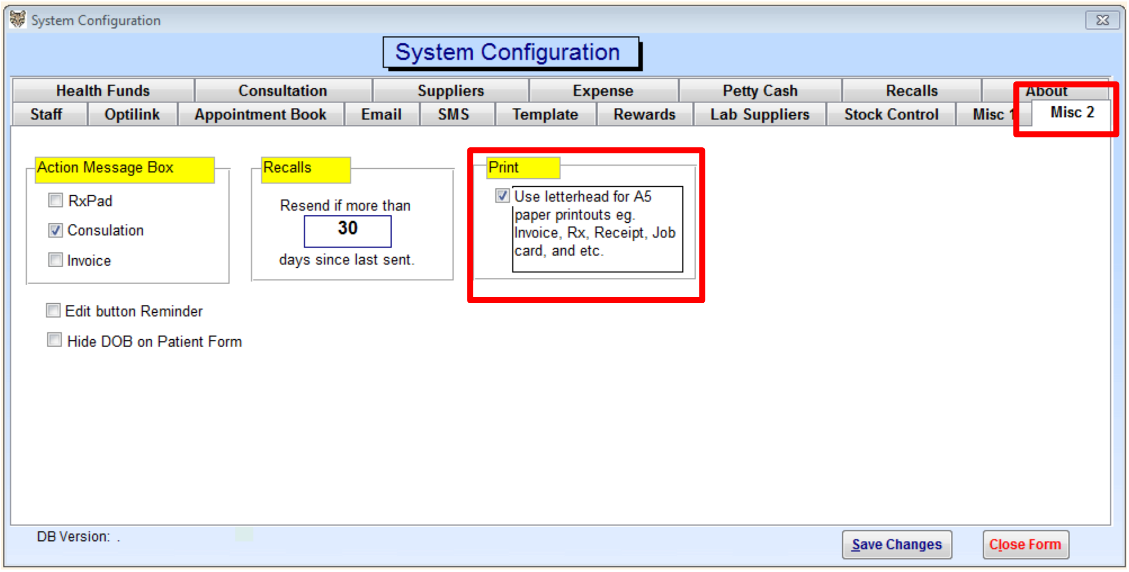


You can send recalls from the **Marketing** screen and view last recall sent information from the Patients screen.

11 Applying your Logo to Printouts

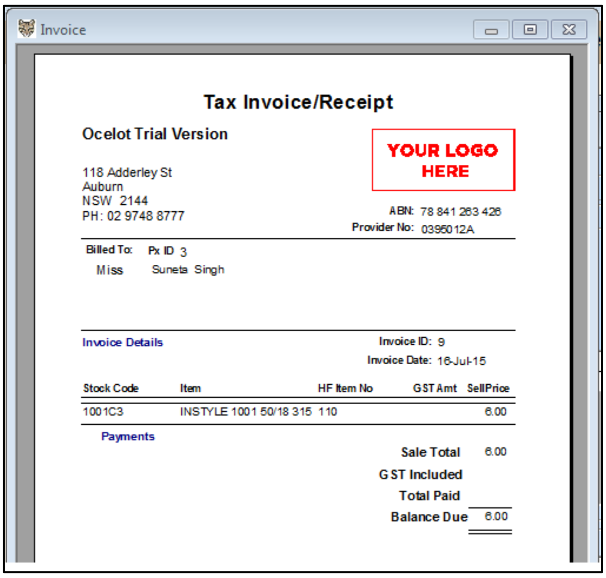
Using a Pre-Printed Letterhead

1. From the main Ocelot screen, go to Setup > System Configuration
2. Click on the **Misc 2** Tab
3. If you have a pre-printed letterhead, tick the option: ‘**Use Letterhead for A5 paper printouts**’



Using your own Logo

1. Please ensure you have a copy of your company logo in Bitmap format (**.BMP**)
2. For optimal print results, the size/dimensions should be: **(W) 210 x (H) 100 pixels**
3. Please then save the file as **UserLogo.BMP** in your Ocelot folder (ie. C:\Ocelot\UserLogo.BMP)

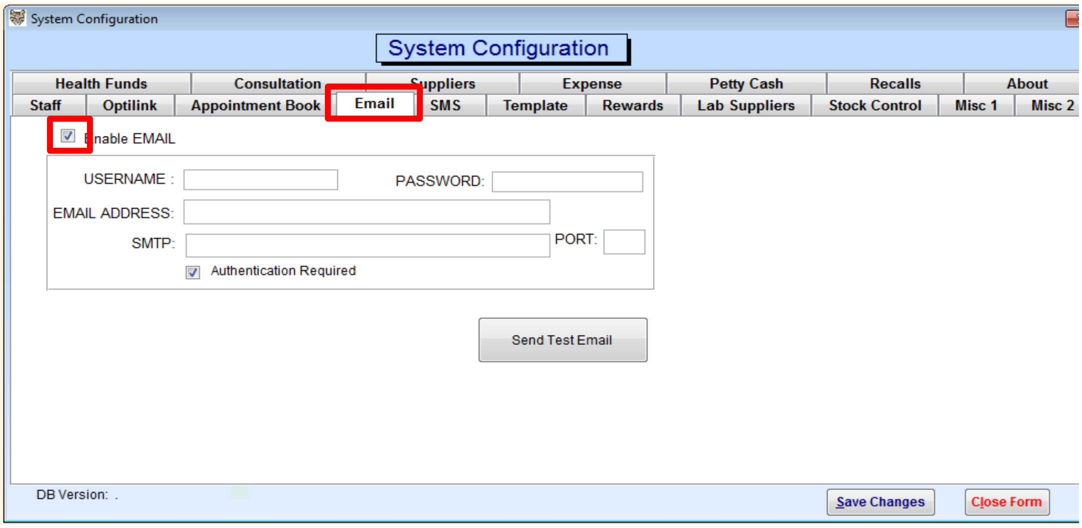


HINT/TIP:	If you would like some help with setting up your logo in Ocelot, please contact Opticare: **Phone:** 02 9748 8777 **E-mail:** info@opticare.com.au

12 E-mail Functionality

HINT/TIP:	**Please ensure you have an active internet connection before proceeding with this chapter of the User Guide.**

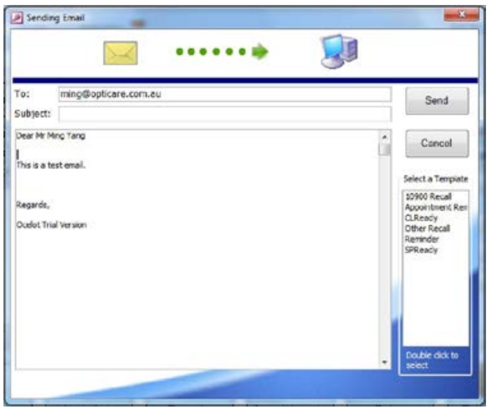
Setting up your E-mail



1. In the System Configuration window, select the **Email** tab
2. Tick the **Enable EMAIL** option and fill in your email account details

HINT/TIP:	After setting up your email, make sure you click on **Send Test Email** to ensure the mail function is working properly.

Sending One-Off Emails



1. Open the **Patients** screen and find the patient you want sent to.
2. Click on the icon next to the **Email** field.
3. Enter your message or select from a template, then click **Send** button.
4. An Email success prompt will show up once the email has been sent. Otherwise, an error will tell you what you need to do.

Sending an Appointment Reminder

1. In the **Appointment** screen, click the patient you want to send reminder to.
2. Click the Email icon in the patient info area.
3. Enter your message or select from a template, then click **Send** button.

Sending Batch Appointment Reminders

1. In the **Appointment** screen, click the Email icon from the **Appointment Toolbar**.
2. Select the **Appointment Start Date** and **Appointment Stop Date**.
3. Modify your message if you need to.
4. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

Sending a Recall

1. In the **Marketing** screen, tick **Recall** then select a Recall from the dropdown list.
2. Select the **Start Date** and **Stop Date**. Then click the **Next** button.
3. Review the patients list. Then click **Next**.
4. Select **Send By Email** and select **Template** from the dropdown list.
5. Click **Next** button. The system will generate the patient list with appointments in selected date range and send individual message to them.
6. A sent report will be generated and the system will ask you if you want to view the report or not.

Sending Reward Points Marketing Email

1. In the **Marketing** screen, tick **Reward Points** and fill points range. Then click the Next button.
2. Review the patients list. Then click the **Next** button.
3. Select **Send by Email** and select **Template** from the drop down list.
4. Click the **Next** button. The system will generate the patient list with appointments in selected date range and send individual messages to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

Viewing Emails

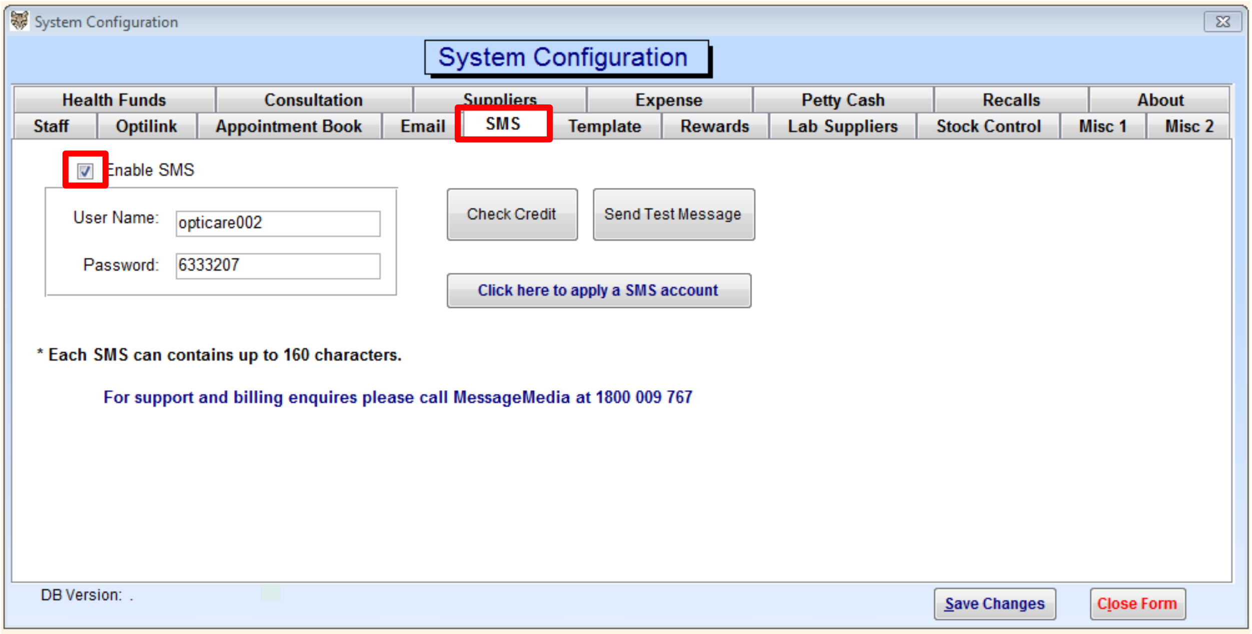
1. Open the **Patients** screen and find the patient you want to view email results.
2. Click **Email** button and a **View Email** screen will show.

View Email Sending Log

1. Open Windows Explorer and navigate to **C:\Ocelot\Log folder**. All Email sending logs are there with sending date as part of the file name.

13 SMS Functionality

Setting up your SMS Functions



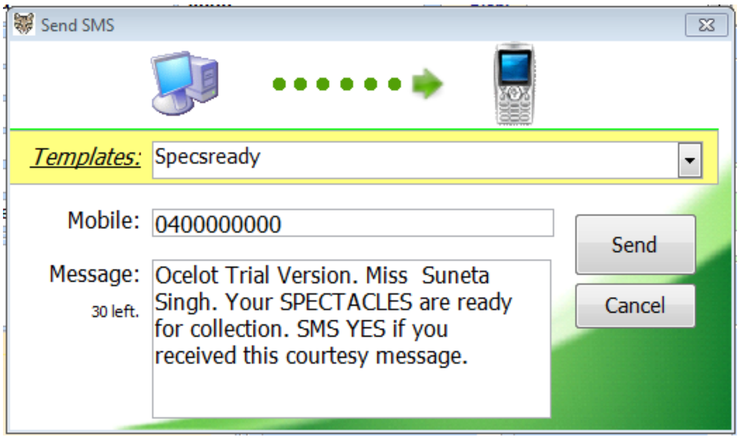
1. In the System Configuration window, select the **SMS** tab
2. Tick the **Enable SMS** option and fill in your SMS account details

If you don't already have a SMS account, you can register online at: http://www.opticare.com.au/software
Pricing information can also be found online. Once registered, you will receive a user name and password which will need to be entered in the SMS tab (as pictured above).

HINT/TIP:	After setting up your SMS, make sure you click on **Send Test Message** to ensure the function is working properly.

Sending a One-off SMS

Note: A fee applies for each SMS sent. Refer to the *Opticare Account Application Form* located on the Opticare Client Access Portal – http://opticare.com.au/client-access



1. Open the Patients screen and find the patient you want to send an SMS to.
2. Click on the icon next to the Mobile Phone field.
3. Enter your message or select from a template, then click Send button.
4. Once the SMS is sent, a SMS success prompt will show up with the remaining credits in your account. Otherwise, an error will tell you what you need to do.

Sending an Appointment Reminder (SMS)

1. In the **Appointment** screen, click the patient you want to send reminder to.
2. Click the SMS icon in the patient info area.
3. Enter your message or select from a template, then click **Send** button.

Sending Batch Appointment Reminders (SMS)

1. In the Appointment screen, click the SMS icon from the Appointment Toolbar.
2. Select the **Appointment Start Date and Appointment Stop Date**.
3. Modify your message if **needed**.
4. Click **Send** button.
5. The system will generate the patient list with appointments in selected date range and send individual message to them.
6. A sent report will be generated and the system will ask you if you want to view the report or not.

HINT/TIP:	You can check the sent results for each message by clicking the **SMS** button from the Patients screen.

Viewing SMS

1. Open the Patients screen and find the patient you want to view SMS results for.
2. Click the SMS button and a View SMS screen will appear.

Viewing SMS Sending Log

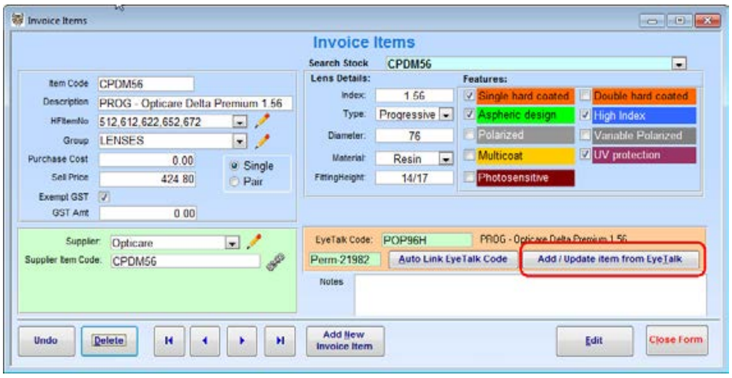
1. Open Windows Explorer
2. Navigate to the following directory: C:\Ocelot\Log

All SMS sending logs are stored here with the Send Date as part of the file name.

14 Integration with Eyetalk Digital

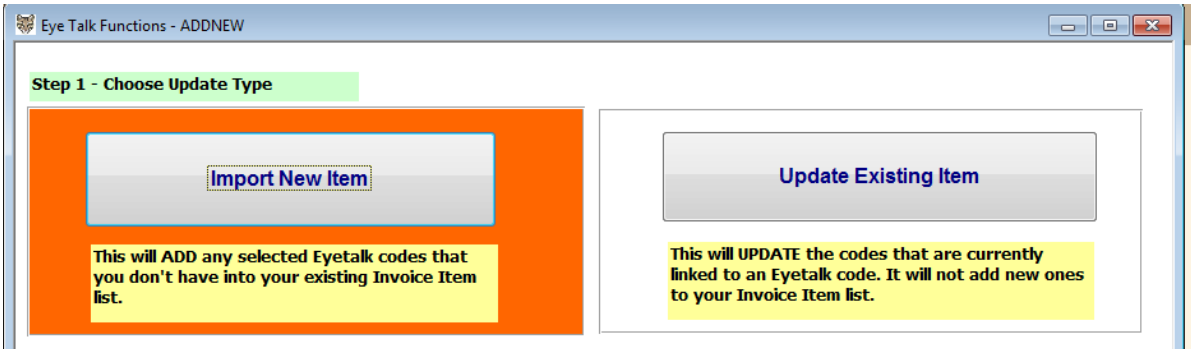
Eyetalk Functions

The Eyetalk functions can be accessed from either the Setup Screen or the Sales Invoice Item screen.



Add New Items from Eyetalk Digital File

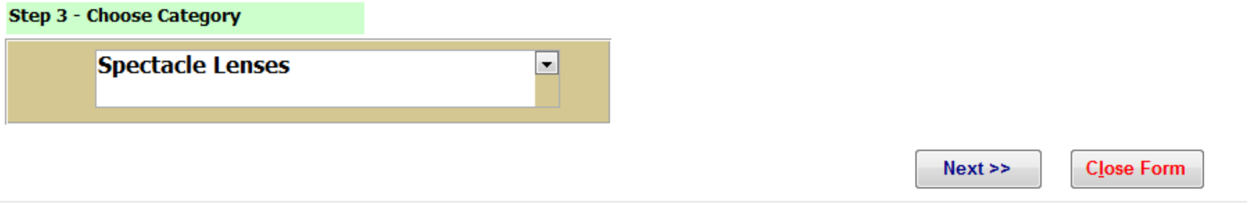
1. Select Import New Item button in Step 1 – Choose Update Type in Eye Talk Function screen



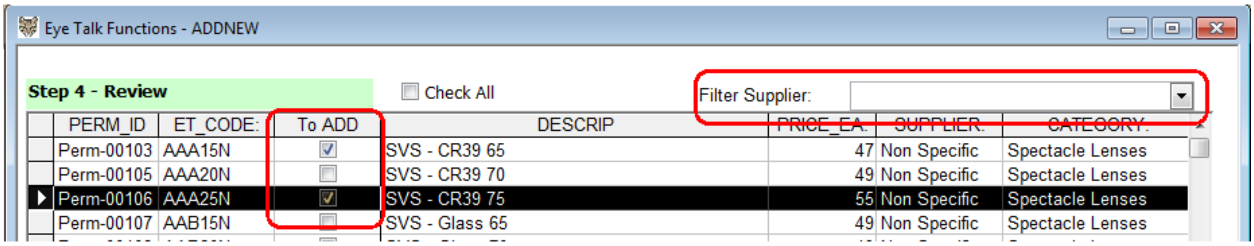
2. Select either **Using Current Eyetalk File** or **Import File** in Step 2. If choose **Import File** ,a pop up window will appear and allow you to select the Eyetalk Digital File from your computer's hard drive.

Note: The **19/08/2015** release of EyeTalk Digital file has been included in this build of Ocelot.
For future updates on EyeTalk Digital, please contact ODMA Eye Talk Consultants – www.eyetalk.com.au

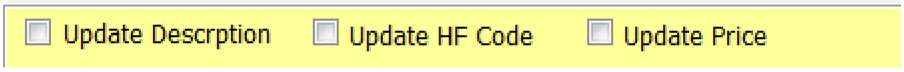
3. Choose a category, then click the **Next** button.



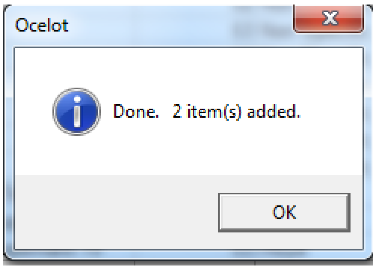
4. Tick the boxes for the items you'd like to import. Use the dropdown Filter to find products easier.



5. Tick/Untick the type of information you'd like to update using Eyetalk data.

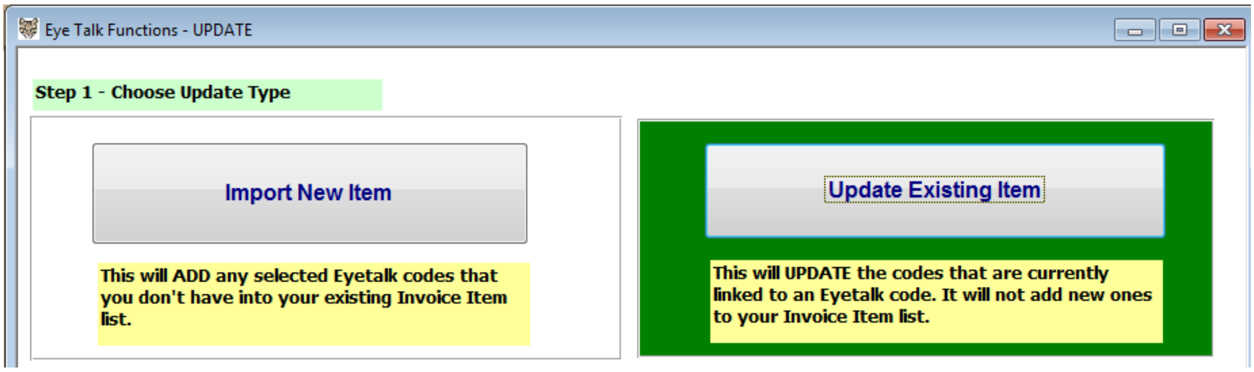


6. Click the **Next** button. A pop up message will show up when the import is complete.



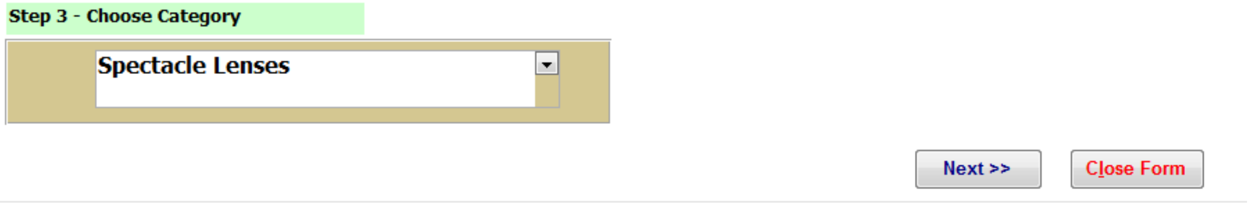
Update Existing Items from Eyetalk Digital File

1. Select **Update Existing Item** button in *Step 1 – Choose Update Type* in the EyeTalk Function screen.

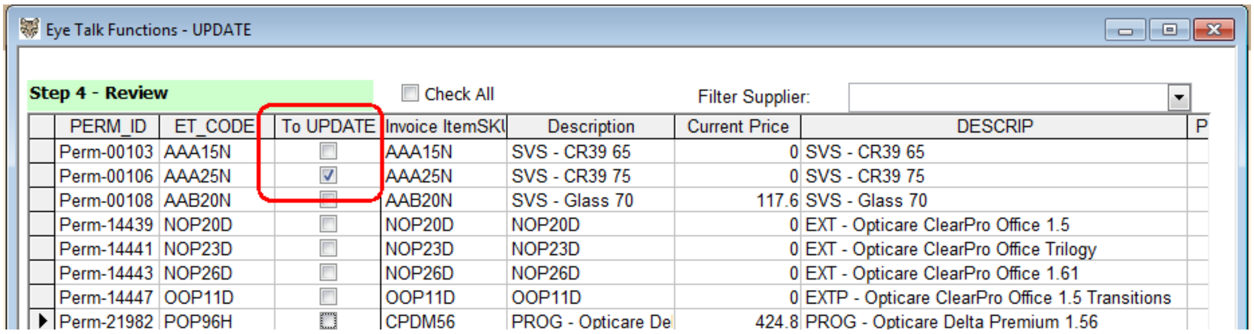


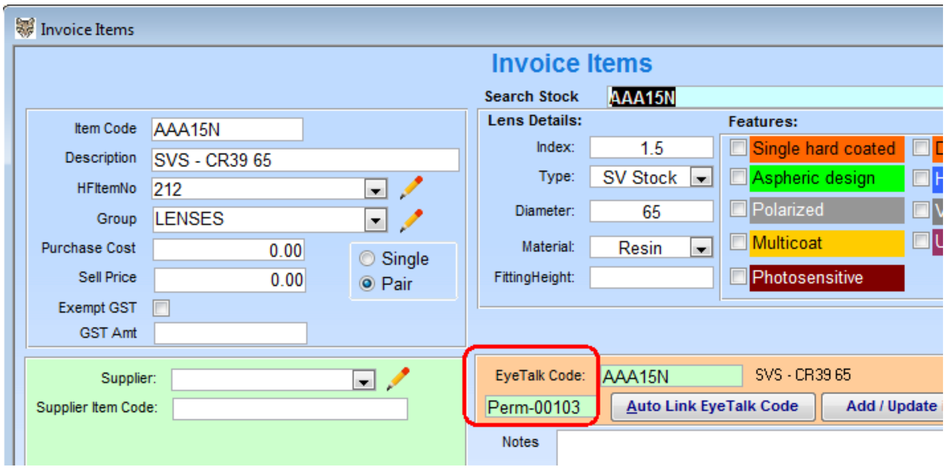
2. Select either **Using Current Eyetalk File** or **Import File** in Step 2. If choose **Import File** a pop up window will show up and let you select the Eyetalk Digital File from your computer hard drive. NB: The 1/7/2015 release of EyeTalk Digital file has been included in this build of Ocelot. For future update please contact EyeTalk.

3. Choose a category, then click the Next button.

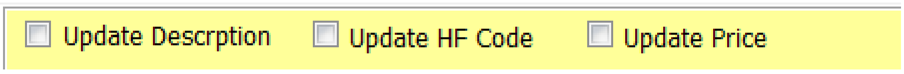


4. Tick the box for items you'd like to update. Use the dropdown filter to find products easier. This will list all items currently linked with Eyetalk (Note: PERM_ID also appears in Sales Invoice Items)

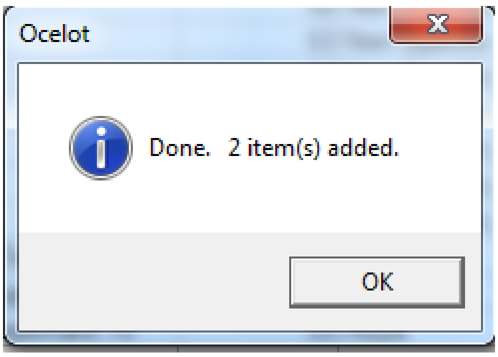




5. Tick/Untick the type of information you'd like to update using Eyetalk data.



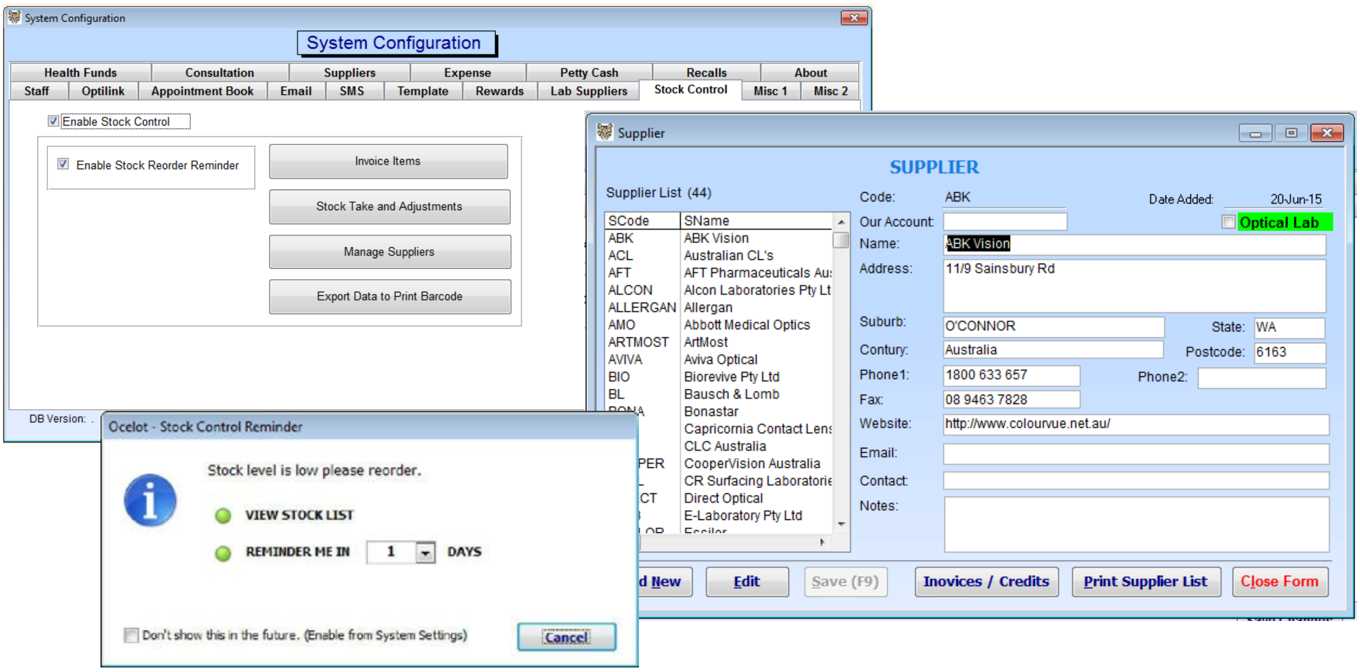
6. Click the **Next** button. A pop up message will appear when the import is complete.



15 Stock Control

The Stock Control tab is accessible through **Setup** > **System Configuration.**

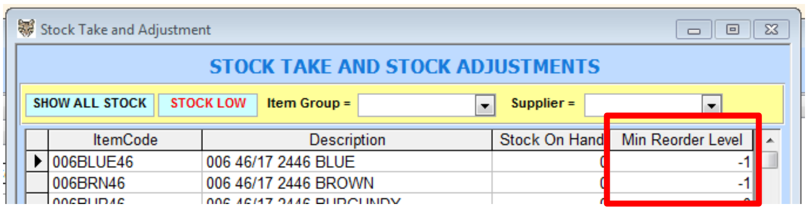
From here, you can enable/disable Stock Control, setup reminders, manage suppliers and export data for printing barcodes.



Stock Take and Printing Stock Barcodes

Disable Stock Order Reminders

- Click on the **Stock Take and Adjustments button**
- Set the Min Reorder Level to **-1**
- Click on **Close Form**



Export Stock Data for Print Barcode

This allows you to export your current list of stock and transfer it over to your preferred barcode printing program.

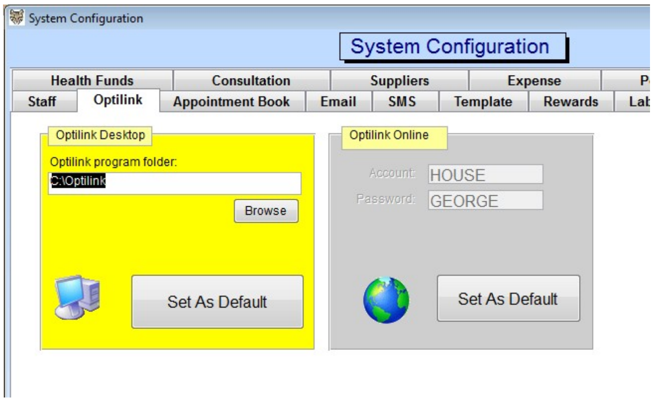
HINT/TIP:	For more information, please refer to the **Barcoding** section of this User Guide.

16 Sending Jobs Via Optilink

OPTILINK

Sending Jobs via Optilink (Desktop)

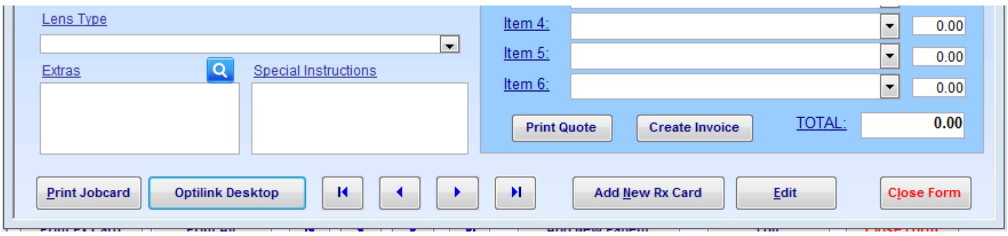
Setup for Desktop version

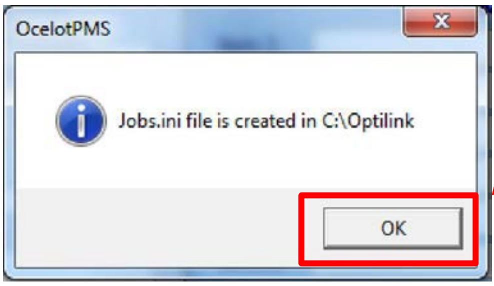


- The Optilink tab is accessible through Setup > System Configuration.
- Click on the Set As Default button
- The Optilink Desktop box will then be highlighted yellow (default)
- By default, Optilink is installed to the following program folder/directory – C:\Optilink
  Please DO NOT change this setting unless you have installed Optilink on your system.

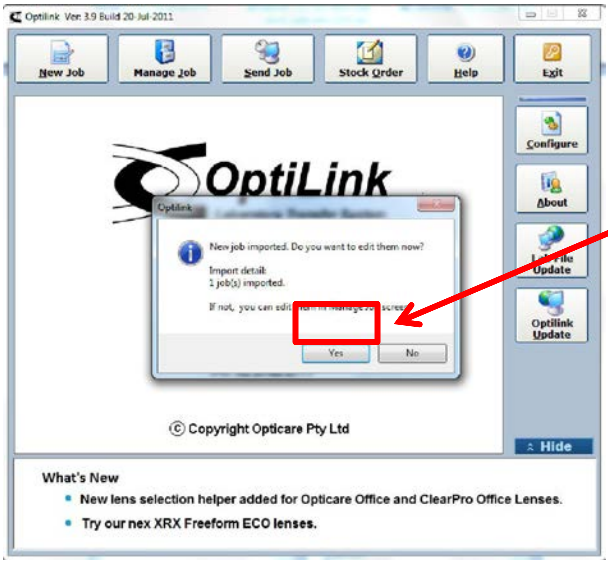
Sending a Job via Desktop version

- The Optilink button can be found at the bottom of the RxPad screen.
- Once you have completed the required fields for a job, click the **Optilink** button to transfer job data to Optilink.



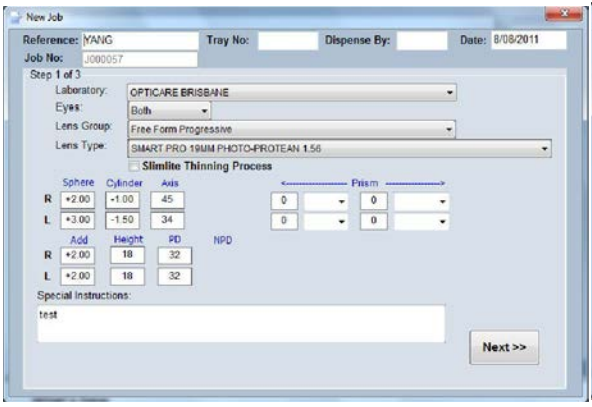


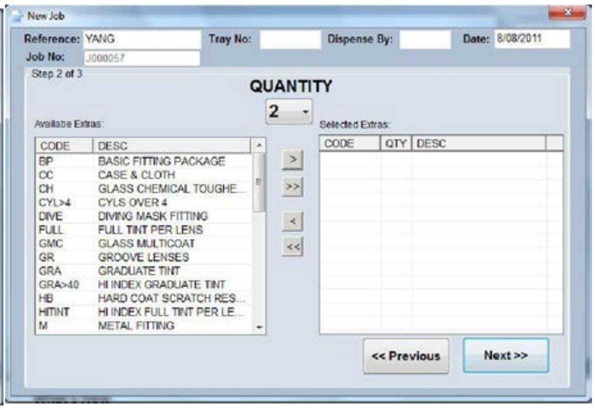
- Clicking the **OK** button will start up the Optilink desktop application.

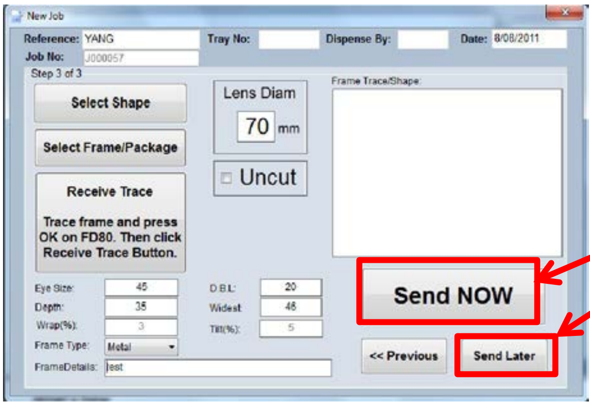


- Clicking the **Yes** button displays an edit imported job screen.

- You will then need to select: lens group, lens type, extras, and trace frame (if necessary) to complete the job details.





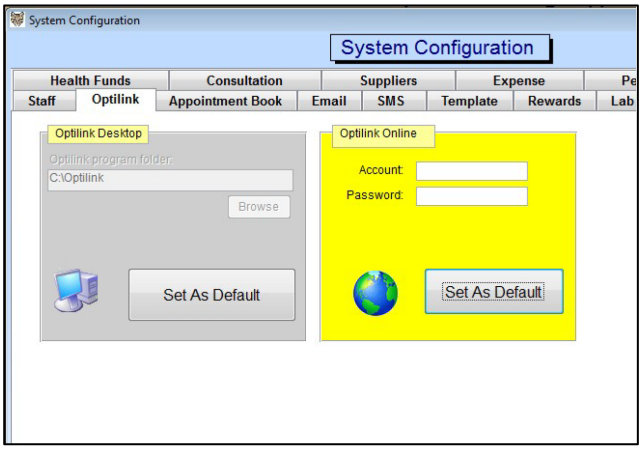


- Click **Send Now** to send the job immediately
  OR
  Click **Send Later** to send it with other jobs

HINT/TIP:	For further information, please refer to the Optilink help file which was installed with the Optilink software.

Sending Jobs Via Optilink (Web)

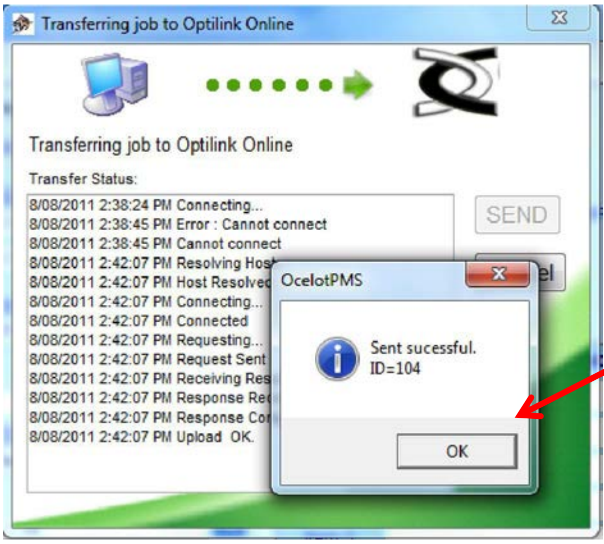
Setup for Optilink Online



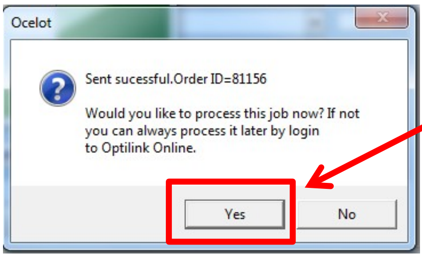
- The **Optilink** tab is accessible through **Setup** > **System Configuration.**
- Click the **Set As Default** button **in Optilink Online** section and fill in your login details.
- If you don't have an account with Opticare, please phone Opticare at 02 9748 8777 to arrange it.

Sending a Job to Optilink (via Optilink Online)

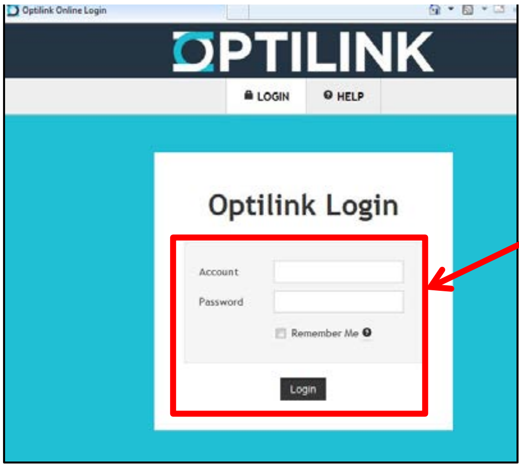
1. The **Optilink Online** button can be accessed through the **RxPad** screen.
2. After filling required fields for a job, click the **Optilink Online** button to transfer job data to Optilink Online.



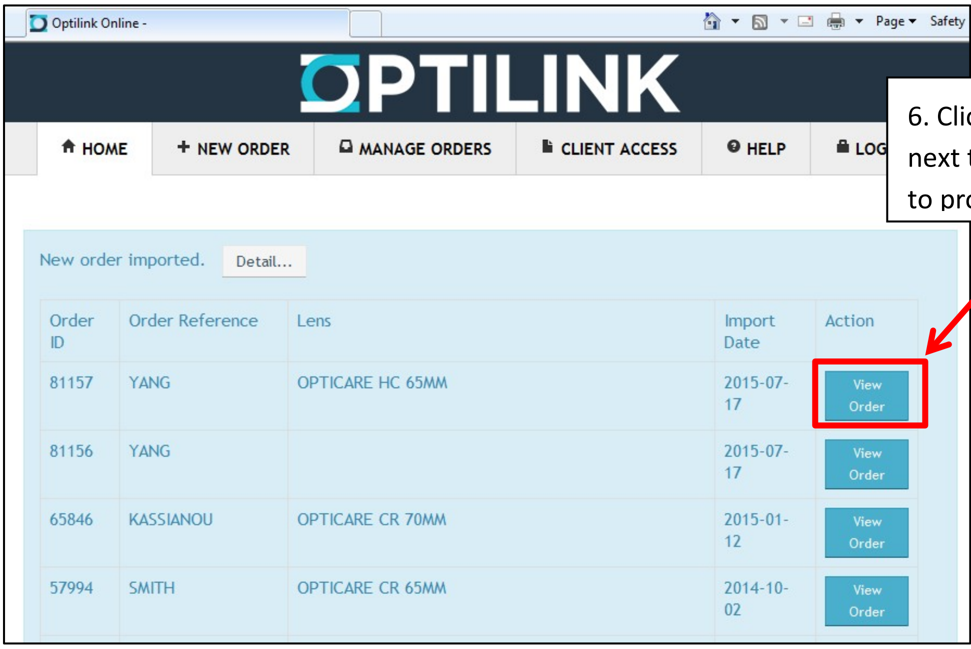
3. Click **OK** button on the job transfer finished window



4. Click the **Yes** button to start Optilink Online.



5. Enter your Optilink Online **Account** and **Password**, then click **Login** button.



6. Click on the **View Order** button next to the order you just imported to process the order.

NOTE: If more than one imported order shows in the list, please use the Order Reference and Order ID to find the correct one.

HINT/TIP:	The Order ID is the same number shown at the top of the Job Transfer finished window.

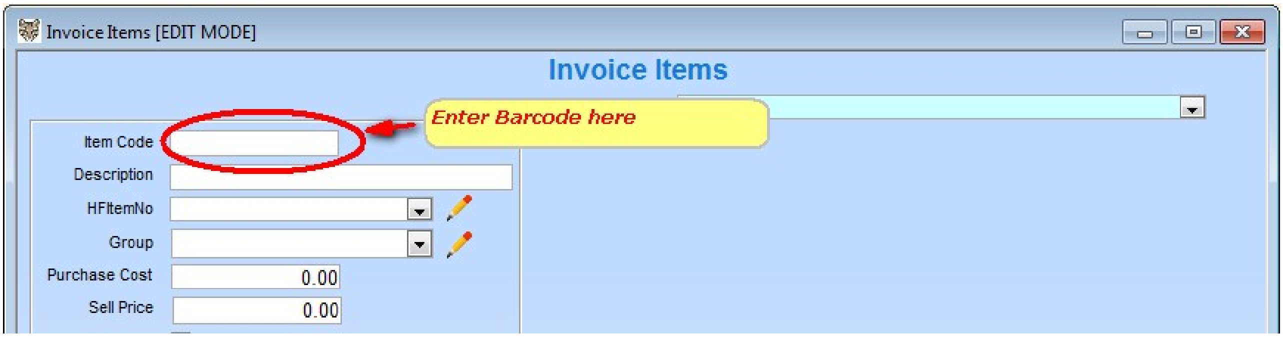
17 Barcoding

Ocelot is compatible with most barcoding labels and systems.

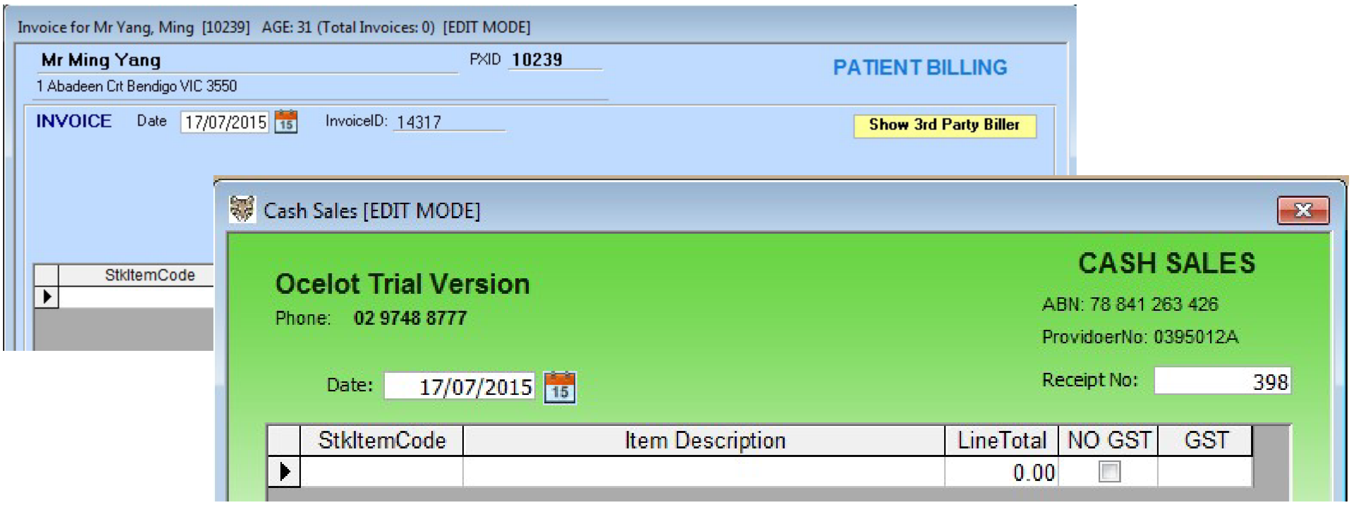
We have specifically tested Ocelot with BROTHER® and Avery™ systems using EAN 8 and EAN 13 labels and the results were excellent. Most products that are pre-coded will be using EAN 8 or 13 barcodes.

Using Barcoded Products with Ocelot

Products that arrive barcoded have to be entered into the system before the barcoding can be utilised. They are entered as per any other Cash Sale or Invoice Item. All you have to do is wand or manually enter in the barcode as the Item Code.



You can then recall these products by wanding or entering the code as required (ie. when invoicing or processing a cash sale). The cursor is placed into the Item Code field then the item is scanned.



Creating Your Own Barcode Labels

If you wish to create your own internal barcode labels, you can use any label printer and software that is barcode capable. You will need to follow the instructions for each package.

Ocelot has been tested with the Brother QL 570 and P-touch 1230 PC printers and Brother P-touch Editor 5.0 software and has displayed excellent results with single label printing and scanning. The application has also been tested with Avery DesignPro 5 labelling software with sheet labels, also displaying exceptional results.

The above mentioned are only two of many systems that are available for Barcoding. The type of printing and label system you use is entirely up to you.

Setting up In-House Barcodes in Ocelot

- To set up In-House barcodes with the codes manually entered into Ocelot (then exported to a label printing system), it is best to use the Code 39 barcode font (also known as Alpha39, Code 3 of 9, Code 3/9, Type 39, USS Code 39, or USD-3) which is available as a free download.
- With Code 39 codes, it is more practical to limit yourself to less than ten characters for ease of printing.

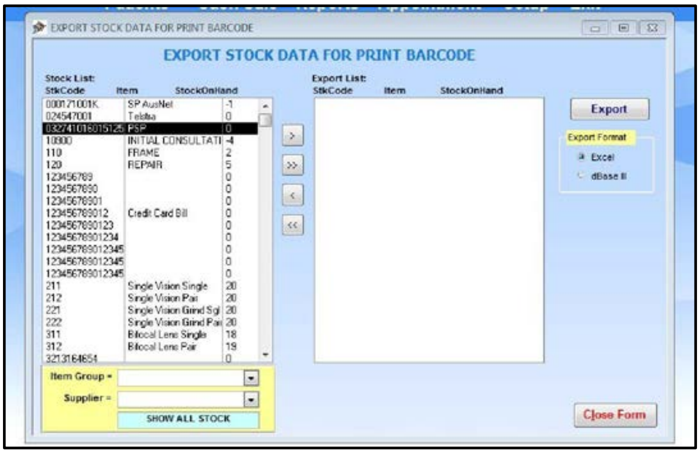
HINT/TIP:	It is important to work out your own consistent and unique naming convention prior to developing your own in house codes.

These codes are entered as per any other Cash Sale or Invoice Item, but you can only use uppercase A to Z and numerals 0 to 9 or a combination of each.

You can enter the item codes manually then export them from Ocelot to any labeling system that accepts XL or dbf data, such as Brother or Avery.

(Brother can be done as single or multiple labels but Avery are sheet format and more suited to multiple labels).

Alternatively, you can create your labels first in the labelling software, using any EAN 8 or 13 or Code 39, then scan them into the system as previously detailed for products that arrive barcoded.



Creating In-House Scanning Sheets

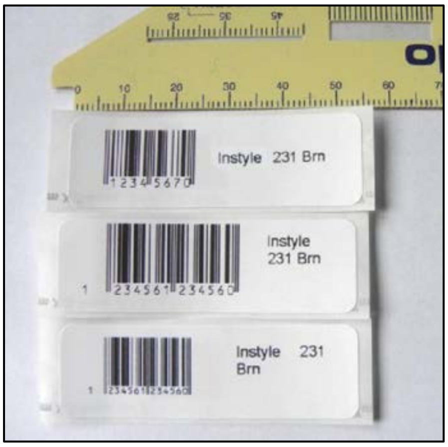
Scanning sheets contain groups of often used items and/or items that are not suitable for Individual labeling. Examples of these are the sheets used at Bunnings registers for the screws, nuts and bolts.

These can be easily done in excel/spreadsheet format and samples are provided on the following page in free 3 of 9 format, together with EAN 13 label samples.

HINT/TIP:	Opticare can assist you with setting up your barcoding system or creation of scanning sheets (for a fee). Please contact Opticare Sydney for more information, or log a support ticket via our Help Desk: www.opticare.com.au/support

Barcoding Label Samples

Avery DesignPro EAN 13 label

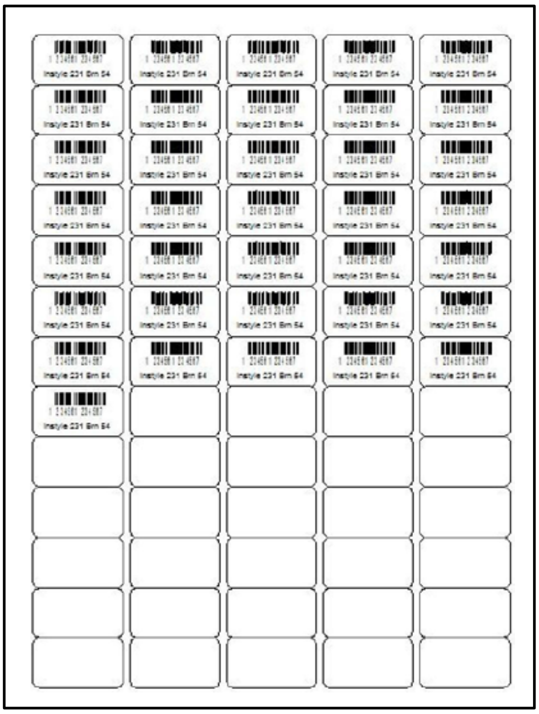


Brother QL 570 EAN 13 label

BarCode	ItemName
	10900 INITIAL CONSULTATION
	110 FRAME
	120 REPAIR
	211 Single Vision Single
	212 Single Vision Pair
	221 Single Vision Grind Sgl
	222 Single Vision Grind Pair
	311 Bifocal Lens Single
	312 Bifocal Lens Pair
	411 Trifocal Lens Single

Sample Scanning Sheet
Using Free 3 of 9 font

Brother P-touch 1230 PC EAN 13 label



Avery DesignPro EAN 13 sheet labels

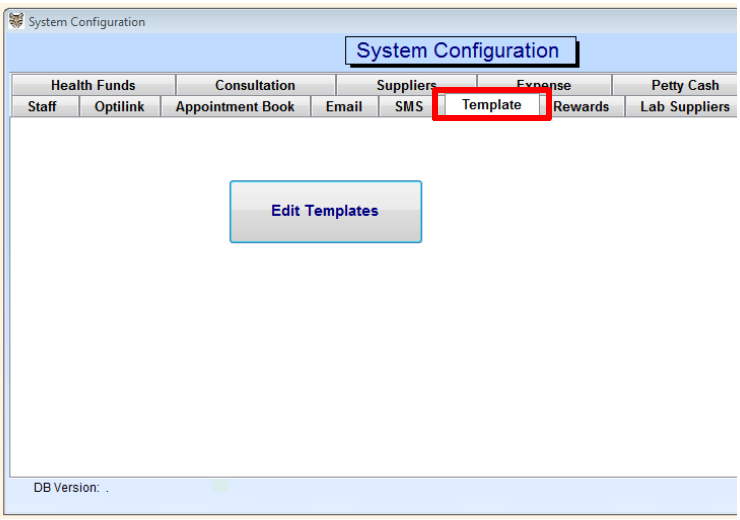
18 Templates

Templates are used for sending Email, SMS and Letters.

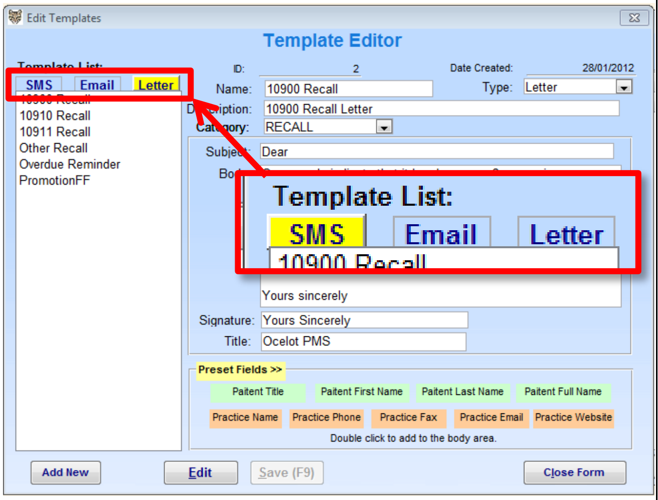
1. From the main screen, click on **Setup**

2. Click on the **System** icon

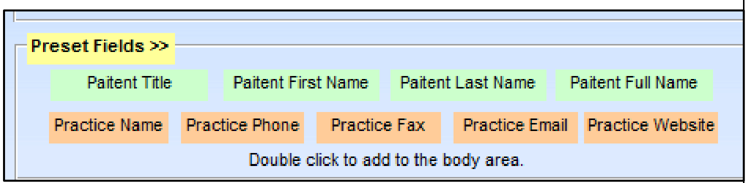
3. Select the **Templates** tab



4. The **Template Editor** will appear. Select the SMS, Email or Letter tab to switch templates.



5. **Preset Fields** is an easier way to add customised information to the template.



19 Appendix

Shortcut Key Commands

Some users prefer to use "Shortcut Key" commands instead of a mouse. With Ocelot, Shortcut Keys are available in most modules.

To use a Shortcut Key you hold the *Alt* key while pressing the underlinedcharacter.
This performs the same function as clicking on the command button with the mouse.

In the **Patient Card** module (shown below) *Alt + N* is the same as clicking the **Add New Patient** command button. *Alt + R* is the same as clicking the **Rx PAD** command button etc. If you take note of the underlined characters on each form you can use them as Shortcut Keys.

ALT + N Add New Patient
ALT + R RxPad

Printing Information – Forms

	Report	Details	Default Print Setting
PATIENTS	**Print Px Card**	Will print if your printer is setup to print 6x4" index cards	
	Print All	Prints the patients' details	A4
RXPAD	**Print Job card**	Prints the job card form	A5
CONSULT	**Print Detail**	Prints the patient consultation details. The printout is set to A5 paper.	A5
	Print Rx	Prints the prescription details for the patient	A5
CONTACT LENS	**Print CL Order**	Prints the contact lens order	A5
	Print CL Rx	Prints the Contact Lens prescription details.	A5
INVOICE	**Print Invoice**	Prints the Invoice/Receipt	A5
	Print Receipt	Prints receipts for part payments via lay-by, deposits etc.	A5
INVOICE 3rd Party Biller	**Print Invoice – Third Party Biller**	Prints the contact lens order.	A4
	Print Receipt – Third Party Biller	Prints the Contact Lens prescription details	A4
CASH SALE	**Print Receipt**	Prints the Cash Sale receipt	A5

PLEASE NOTE: All A5 Printouts can use either pre-printed letterheads or blank paper. You can set this in the Report Printing Information

Printing Information - Reports

Command	Default Print Setting
3rd Party Biller Report	A4
Banking Summary with Payment Type	A4
Cash Sales Banking Summary	A4
Cash Sales Summary	A4
Expenses Payments Report	A4
Expenses Summary	A4
Job Due Report	A4
Outstanding Balances	A4
Patient Summary	A4
Payments Received By Type	A4
Payments Received Summary	A4
Petty Cash Report	A4
Recall Labels	**Avery J8160** A4 Labels (63.5mm x 38.1mm)
Recall Letters	Can set to A4 or A5
Reward Points Summary	A4
Sales By Item	A4
Sales Summary	A4
Supplier Payments Report	A4