

# Release Notes

Optisoft.NET v 1.2.2143.2

27<sup>th</sup> August 2021

## Issues

### Patients Recall

- Addressed an issue where the left Base Curve was being added to the right eye's description in the contact lens Rx.
- Addressed an issue that was incorrectly highlighting Irish mobile numbers as invalid even though the field was correctly validated as the Irish Mobile type.
- Corrected an issue that could cause the column layout on the Recall screens to expand.
- Addressed an issue that was preventing the Mandatory and Recommend validations on the postcode field from working correctly.
- Addressed an issue that meant deleted Clinical Records visits were being listed on the Clinical Records tab in the patient's record.
- Addressed an issue that was preventing a patient's recall from being processed if the recall in question was not for the patient's default/original branch.
- Addressed an issue that could create duplicates when importing new patient documents on hosted setups with a slow internet access.
- Addressed an issue where the GP dropdown was listing the GPs available to the surgery of the previously selected patient when the current patient does not have a surgery selected themselves.

### Appointments

- Addressed an issue that was preventing templates from being available to a staff member when the template previously included an appointment type that that staff member is not able to perform.

### Clinical Records

- Resolved a problem with the Brush tool on the Drawing screen not using the correct selected colour.
- Addressed an issue with moving Pages on a Visit in Visit Maintenance
- Corrected the tab order for the fields on the End Visit screen.
- Addressed an issue that was causing an active visit to be closed when the user viewed a saved document.
- Addressed an issue with 'nonsense' characters being displayed at the bottom of the Clinical Records printout.
- Addressed an issue where the New Document button was available whilst the user was viewing a deleted visit.

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## Cash

- Resolved an issue with change payments on the Till Reconciliation screen.
- Addressed an issue with the Adjustment button not activating correctly when a dispense is brought through into Cash.
- Addressed an issue where items added to a transaction and then deleted before the sale is completed were still adjusting the stock level of the item.
- Further work has been done to address issues with refunds occasionally causing later payments to be allocated incorrectly as a deposit amount.

## Stock

- Addressed an issue with items with blank spaces after the Option that could result in stock transactions to the incorrect Model/Option combination.
- Addressed an issue that was preventing some of the stock transactions created by the stock take procedure from being displayed in the product's maintenance screens.
- Addressed an issue that could prevent a user from manually searching for an item within a stocktake.
- Addressed an issue that meant that Actual values were not being recorded correctly under certain circumstances.

## Templates

- Resolved an issue with the currently selected patient's Rx being merged into a dispense document rather than the patient to whom the dispense is associated.
- Corrected an issue with the Spectacles RBalance and LBalance merge codes.

## Reports

- Addressed an issue with items with a blank Retail Cost on the Stock Level report.
- Addressed an issue related to the Quantity and Age values that was causing entries to be reported more than once.

## Maintenance / System Wide

- Addressed an issue with Visit Maintenance not displaying previously saved Visits.
- Corrected a bug where the Full Name in Security maintenance was not Auto-capitalising correctly
- Addressed an issue with Product Option maintenance that was causing an error when selecting items in the list after saving changes whilst editing an item.
- Addressed an issue with the Group/Surgery Maintenance screen not allowing a user to tab through if an address cannot be found from the postcode search.
- Made changes to improve the performance of the Visit Maintenance screen.
- Addressed an issue with the Supplier Maintenance screen displaying an error when there were no Contacts in the database.

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- Addressed an issue that was causing an error when attempting to copy a visit in Clinical Records Visit Maintenance.
- Corrected an issue that was preventing the user from saving in Clinical Records Page Options maintenance after copying an existing page option.
- Addressed an issue whereby the changes made to improve performance were affecting the sort order of the list of products.
- Addressed an issue that was allowing selection dialogs to appear behind the software when printing documents that required the user to make a choice of what element to merge.
- Corrected an issue with the Postcode Maintenance popup not identifying whether the file was present in a hosted setup.

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## Changes

### Patients Recall

- Added additional fields to the Export processing method.
- Deleting a patient will now delete the recalls from the patient. Restoring a deleted patient will now include an instruction that the user will need to manually recreate the recalls.
- Added a column on the patient's Spectacles summary tab to display the Collection Date.
- Added a 9 Months option to the list of Valid For options in the Rx screen.
- Added a column to the patient's Clinical Records summary tab to indicate whether the recall was updated by the visit.
- Made a change to disable the Email and SMS buttons when the patient does not have a valid email address or mobile number.
- The Clinical Records tab in the patient's record now shows visits that were performed at other branches as well.
- Made changes to the Print option in Patients in an attempt to improve the performance.
- Added a column to the Spectacles tab to display the Tray that the dispense is assigned to.
- Added new validation types for a selection of commonly inputted countries' mobile numbers formats.

### Email / SMS

- Added the ability to multiselect documents to attach to an email.

### Appointments

- Removed the titles from the contact list in Diary Scheduling screen and the sort order has been adjusted accordingly.

### Clinical Records

- A Visit can no longer be created without having a patient selected.
- Added line breaks between elements to aid in readability of the Clinical Records visit print output.
- The patient's Age is now included in the label displayed at the top of the Visit.
- Prescriptions that do not meet the basic requirements will not be saved.
- Added an option to the context menu on the Documents tab to View the saved document.
- The Update Recall column on the initial screen will display No values in red.
- Added an option to display deleted visits on the summary screen. The user can view the deleted item but cannot restore or make changes with it without assistance from the Support team.
- Changed the creation method of the Clinical Records printout to address some compatibility issues with user's systems.
- The product name has been added to the contact lens summary of the Clinical Records output document.

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- Changing branch

whilst in the Drawings screen now returns the user to the list screen.

- Made a change so that if a patient has no previous visit, the Previous Rx button will display a list of the Rxs from the main Patient module.
- Added the ability to Print a visit record by right clicking on a visit.

## Cash

- Contact lens dispenses can now be found in the Find Dispense screen.
- Voided transactions no longer appear in the Summary tab or the Cash tab on the patient's record.
- Added the option to save a receipt to PDF to the confirmation screen.

## Spectacles

- The module interface has been redesigned including the addition of a new Measurements tab.
- Added an option to display deleted dispenses on the summary screen. The user can view the deleted item but cannot restore or make changes with it without assistance from the Support team.
- Made a change to the layout of the list screen to make it consistent with the other modules' list screens.
- Added New, Edit and Delete buttons to the History tab in dispensing.
- The new OC measurements are not visible until a vision type has been selected on the Dispense Rx tab.
- Initial work has been performed to improve the performance of the module after the redesign.
- Added a Lens Extra product type for use in the Dispensing module.
- Made changes to the design of the Adjustments pop-up screen.
- Made a change that enforces that there can only be one Status validated as Confirmed.

## Contact Lenses

- Added an option to display deleted dispenses on the summary screen. The user can view the deleted item but cannot restore or make changes with it without assistance from the Support team.
- Added elements and functions to bring the module in line with the Spectacles dispensing module
  - Added Next Status button to the ribbon bar and to the context menu on the history.
  - Added the Adjustment button to the ribbon bar.
  - Added the ability to copy an existing dispense.
- The product from the patient's most recent contact lens Rx will be automatically selected when create a new dispense.

## Stock

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- New validation checks have been added to prevent the creation of duplicate models and options.
- Added extra checks to ensure that only one Stock Take per branch can run at one time, added notification box if a user attempts to do so.

## Templates

- Added merge codes for 'Valid For' and 'Expiry' for prescriptions.
- Added merge codes for the new measurements added to the Dispensing module.
- Added a merge code for the Optom Signature relating to the spectacles and contact lens prescriptions.

## Reports

- Reports will now default to the active branch rather than the 'All Branches' option.
- Made changes to ensure that all of the reports are correctly corresponding with the user's security settings in single and multi-branch setups.

## Maintenance / System Wide

- Layout change to the Page Maintenance screen to maintain ratios when not displayed full screen.
- Changed the login box so that it will appear as the top most window and any other dialogs are closed when the software automatically locks.
- Made a change that prevents the user from entering duplicate Page names in the Clinical Records maintenance.
- Updated the version of the Template Editor's text control to allow the addition of extra document features in a future release.
- Added new buttons to the time pickers throughout the software to allow the direct change of hours and minutes without having to put the cursor into that field.
- Added a 'busy' indicator to show the user that the software is still loading data.

## Making Tax Digital (MTD)

- Payments can now be split by type and assigned to distinct nominal codes in Xero.