

**DIGITAL  
VISION**

# FORMS AND CUSTOMIZATION

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# FULL CUSTOMIZABLE WORKTICKET [WSR]

## Options for printing workticket-ish forms

Print a customized workticket/label with the information that you need on your choice of paper or label.

- ◆ Create the form(s) in the Workticket Forms Editor <5,4,1> .
  - **Pro-Tip - Copy WKTKB to create a duplicate customized workticket that prints on something smaller than an 8.5 x 11**
- ◆ Consider creating customized work tickets (labels) for certain job types
  - Uncuts, Finished Picks, Custom Coats
- ◆ We are still looking for a great paper/label option to fit the trays. Let us know!



Form Editor

Form

Type Workticket Form D

Form CUSTB

Font

Height

Width 0

Color Color

Group

Bold Italic

Underline

Modify Placement

Right Justify

Snap to Grid

Filter Fields:

Rectangle

Filled Rectangle

Fixed Text

Barcode

View Printer Scale

Magnify

Cursor Scale x 2 y 15

PRE PRO

Frame Name

Frame Ey /

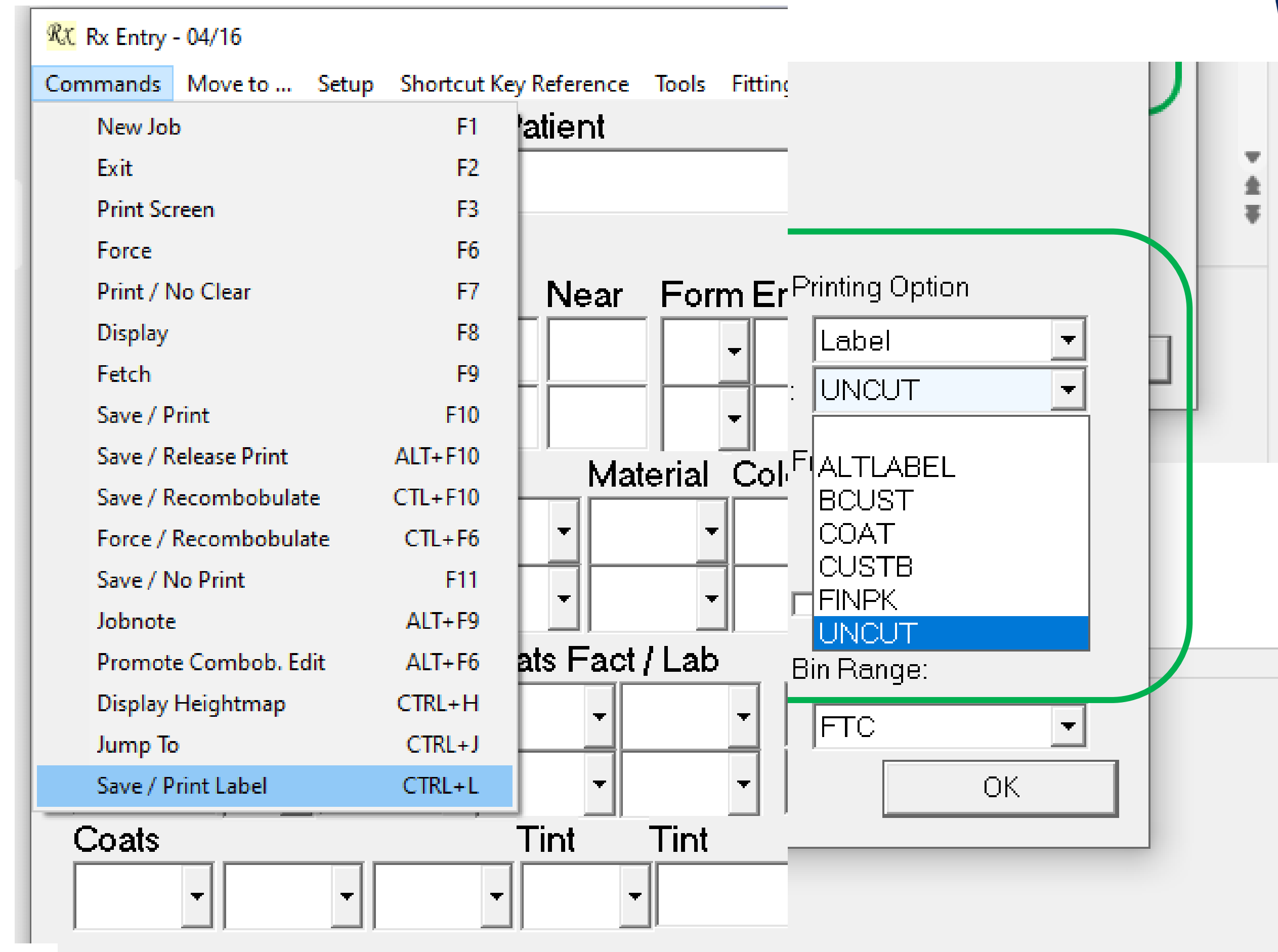
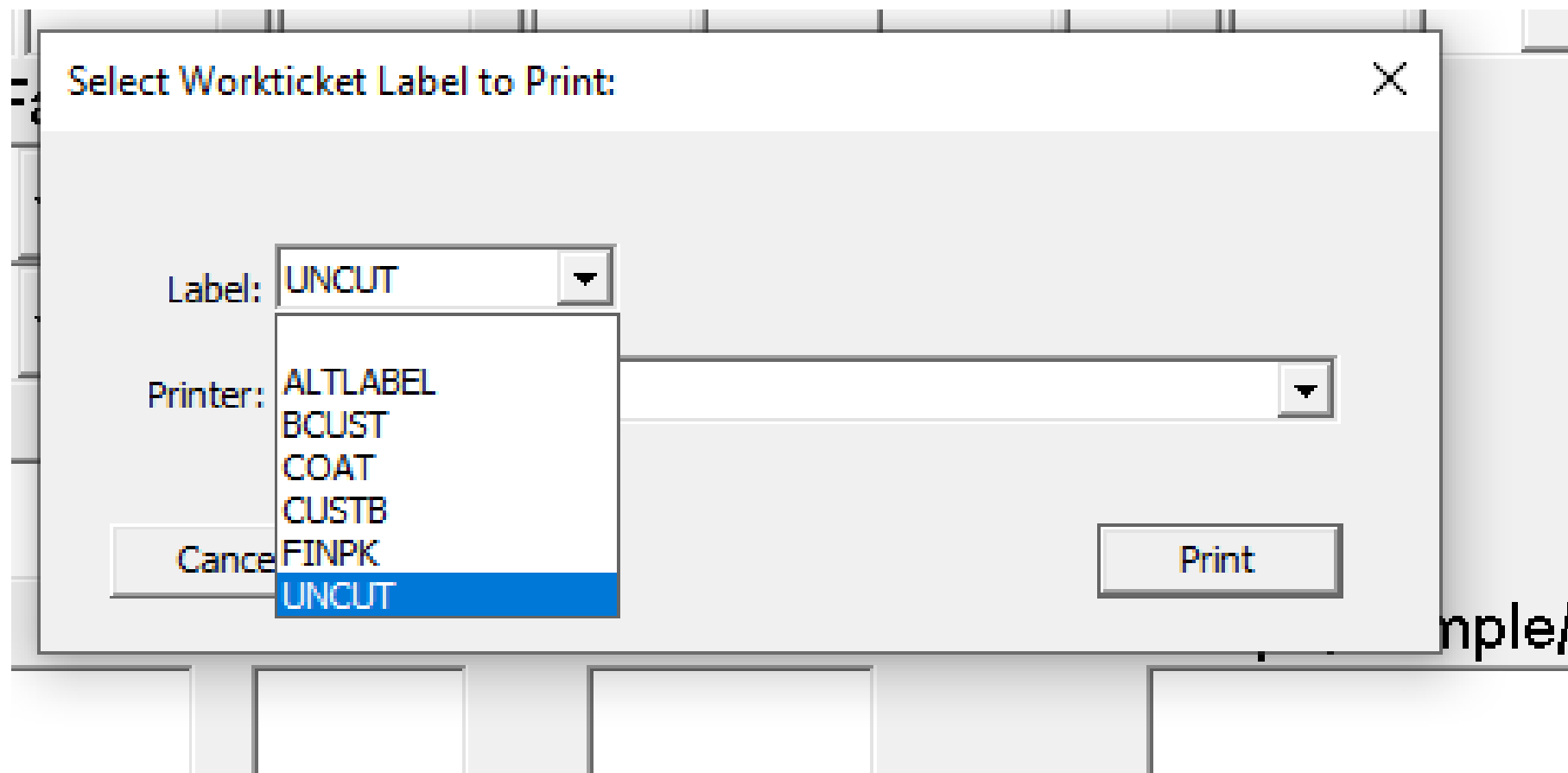
Frame Clr

Frame

Edge Type

# FULL CUSTOMIZABLE WORKTICKET [WSR]

- ◆ Once defined, assign that label to Combob queues that will be printing the orders.
- ◆ Need to reprint? No problem....There is a Save/Print Label function in the Commands dropdown in Rx Entry <1,1>. (CTRL + L)



# FULL CUSTOMIZABLE INVOICE [WSBI]



Get creative with the invoice printing!

You have the ability to easily customize the form that you use for invoice printing

- ◆ Enables the use of custom paper size
- ◆ Labs are printing to 'labels' instead of paper, even taking advantage of a receipt printer
- ◆ Consider copying of INVFORM and renaming it to **INVLAB**.
- ◆ Enable in <4,8,1,1>, F8 Rx Invoice Printing

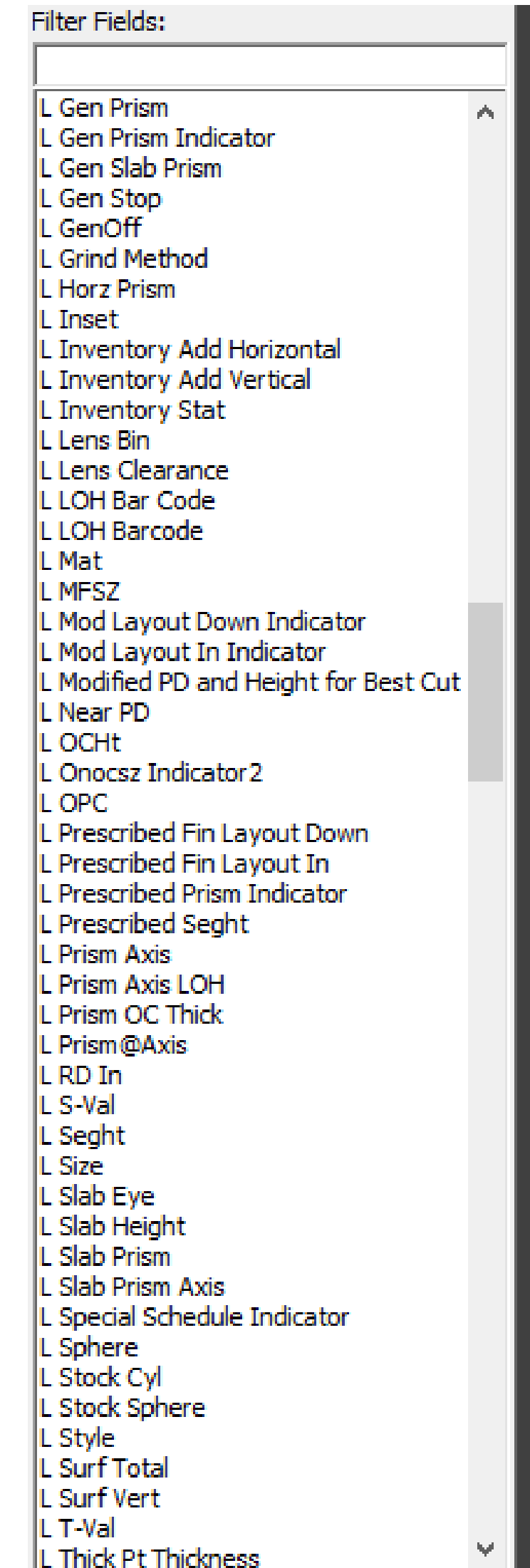
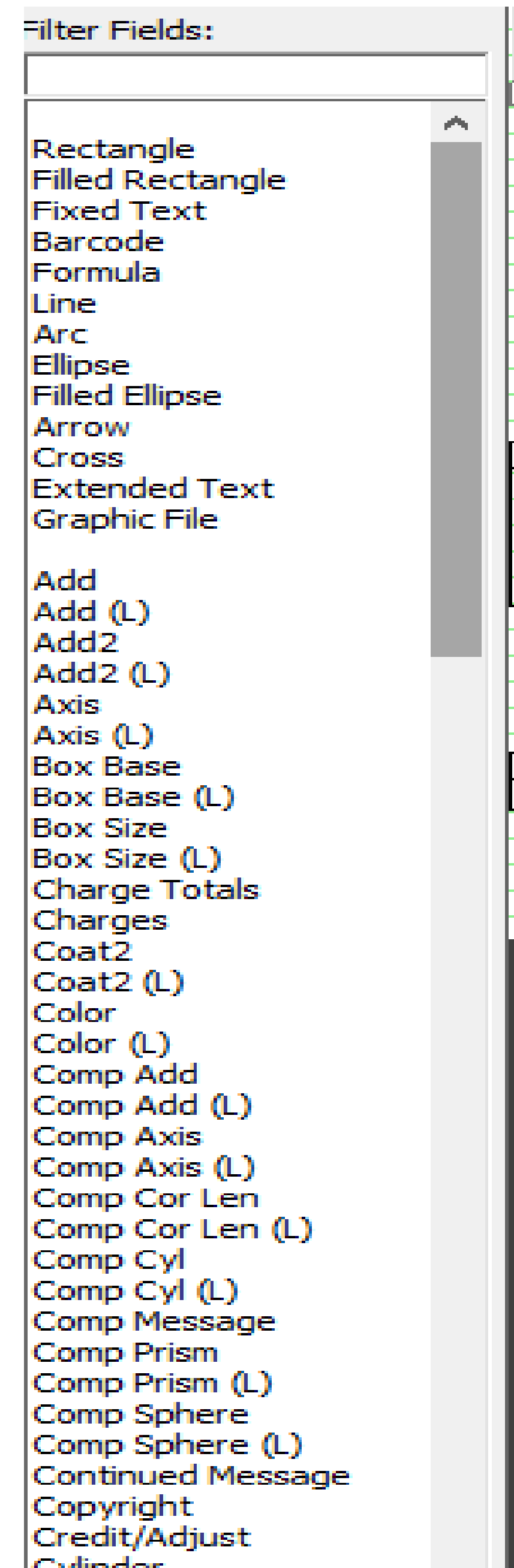
The screenshot shows the WSBI software interface. At the top, there are controls for 'Form Type' (set to 'Invoice'), 'Form' (set to 'INVLAB'), 'Font', and 'Height'. A red box highlights these form selection options. Below this is a grid area for data entry. At the bottom, a table lists various settings for 'F8: Rx Invoice Printing'. A blue circle highlights the 'Use 8.5 x 11 Paper', 'Print Base Curve', and 'Print Tax' settings. A blue box highlights the 'Custom Invoice' setting at the bottom of the table, which is set to 'Y'.

Name	Value	Description
Use 8.5 x 11 Paper	N	Y=Use 8.5 x 11 paper for invo
Print Base Curve	Y	Y=Always print base curve of
Print Tax	Y	Y=Print the word tax on the inv
Print Postage	Y	Y=Print the word 'Postage' on the invoice. H=Print the word 'Handling' on the invoice. N=Do not print postage.
Postage Handling	SHIPPING & HANDLING	Message to display in place of (Postage) or (Handling)
Number of Invoice Copies	1	The number of copies of each invoice to print.
Number of Credit Copies	1	The number of copies of each RX credit to print.
Date and Time Line	50	Line on the invoice where the date and time are printed. 8=Top of invoice. 50 or 51 = bottom of invoice.
8-character Tray Field	N	Y=Use 8-character tray field for invoicing.
Patient Name	F	L=Mailing label. F=Invoice form, just below label. B=Both invoice form and label. N=Do not print patient name.
Alternate Invoice	N	M=Print 22-line mailing label.
Itemize Tax	N	Y=Show tax as separate item on invoice. N=Do not show tax as separate item.
Invoice LPT Port		System LPT port to print invoices to.
Credit LPT Port		System LPT port to print credits to.
Date/Time 1	E	(blank)=Don't print date/time. S=Print ship date on invoice. T=Print ship time on invoice. E=Print entry date.
Date/Time 1 Column	32	Column to print date/time in.
Date/Time 2	S	(blank)=Don't print date/time. S=Print ship date on invoice. T=Print ship time on invoice. E=Print entry date.
Date/Time 2 Column	39	Column to print date/time in.
Date/Time 3	T	(blank)=Don't print date/time. S=Print ship date on invoice. T=Print ship time on invoice. E=Print entry date.
Date/Time 3 Column	48	Column to print date/time in.
Use Dynamic Bins	Y	Y=Use dynamic bin shipping. Bin setup must be done before this can be used. N=Do not use dynamic bin shipping. L=Interface to shipping lab
Allocate Bin for Credits	N	Y=Allocate dynamic bin for credits.
Email/Fax Delay Notices and Credits	Y	Y=Email/Fax both delay notices and credits. N=Do not email/fax delay notices or credits. D=Email/Fax only delay notices. C=Email/Fax only c
Generate PDFs	Y	Y=Export all invoices as PDF. N=Do not export PDF invoices.
Ship Label		Name of label to print as each job is shipped
HIPAA Invoice Option		Number of characters of patient name to print on invoice, credit, delay. Blank for all.
Custom Invoice	N	Y=Print custom invoice INVLAB instead of standard invoice (Note: Use 8.5x11 Paper above must be set to 'N'). N=Print standard invoice.

# FULL CUSTOMIZABLE FORMS [WSR]

## Advantages of using customized forms....

- Utilize all of the standard data fields from the workticket form on the customized form
- Utilize all of the standard data fields from the invoice form on the customized invoice
- Cut down on the amount of paper handling
- Set your lab apart from the other labs by creating a custom look



# FULL CUSTOMIZABLE INVOICE [WSR]



## Helpful hints when working on customized Forms.....

- ◆ **After** copying an existing form, the printer properties need to be changed on the **new form** based on the appropriate printer to be used.
- ◆ Use the new View Printer Scale box to see where things will be placed when the new form is printed to the new printer sizing.
- *Eliminates the need to print a WKTK or Invoice just to see the results of your hard work.*

The screenshot displays a software interface for creating a customizable invoice form. The interface is set on a green grid background. A 'Form' menu is open on the left, with the 'View Printer Scale' option highlighted. A 'View Printer Scale' dialog box is also visible, showing a magnified view of the grid. The main workspace contains several form fields and tables. At the top, there are fields for 'ACCOUNT' and 'PATIENT'. Below these are fields for 'Inv Acct' and 'Ship Addr'. A 'Ship Method' field is also present. The main part of the form is a table with columns for 'SPHERE', 'CYL', 'AXIS', 'DIST', 'NEAR', 'PRISM (I/O)', and 'PRISM (U/D)'. The table has two rows, 'R' and 'L', and several columns for 'Sphere', 'Cyl', 'Axis', 'Dist', 'Near', 'Prism (I/O)', and 'Prism (U/D)'. Below the table are fields for 'BASE', 'COLOR', 'TINT', 'COAT', 'SIZE', 'OCHT', 'THK', and 'COATINGS'. There are also fields for 'MAT', 'LENS STYLE', 'ADD', 'SGHT', and 'Job Type'. At the bottom, there are fields for 'Price List Msg' and 'Charges'. The interface is designed to allow users to customize the form layout and content for printing.

# RX QUOTATION GENERATION [WSR]



From Rx-Entry Screen <1,1>

- ◆ Does not change job type
- ◆ Does not require save
- ◆ Prints to \SANDBOX folder

The screenshot shows the 'Rx Entry - 04/18' software interface. A 'Tools' menu is open, listing various options such as 'Style Pick Help', 'Upload Workticket', and 'Print Invoice Quote'. The 'Print Invoice Quote' option is highlighted in blue. The background interface includes fields for 'Tray' (9090), 'Acct' (9998), and 'Patient' (258820). It also displays prescription details for 'Sphere', 'Cylinder', 'Axis', 'Dist', and 'Near' for both right and left eyes, along with lens and material information.

The printed quotation form includes the following information:

- DIGITAL VISION** logo and 'Ship To:' address: KATHY WASHINGTON OPTICAL, 6805 SE MILWAUKEE, PORTLAND WA.
- Rx Only** g4
- ACCOUNT: 9998, PATIENT: 258820
- CONFIDENTIAL - Contains Protected Health Information
- Prescription table:
 

	SPHERE	CYL	AXIS	DIST	NEAR	PRISM (UO)	PRISM (UD)
R	-1.25			60.0	55.0		
L	-1.25			60.0	55.0		
- Material: POLYCARBONATE, EQUITHIN 0.75, HIDE A BEVEL EDGE AND MOUNT
- Price table:
 

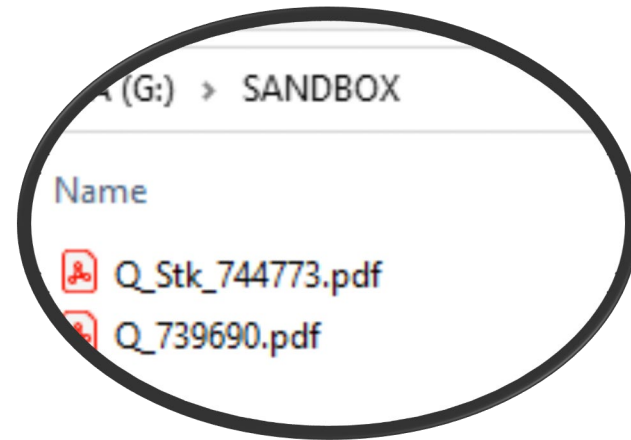
MAT	LENS STYLE	ADD	SGHT	Price
R	PLY UNITYVIAII	250	20.0	64.00
L	PLY UNITYVIAII	250	20.0	64.00
- Summary:
 

SUBTOTAL	128.00
SHIPPING & HANDLING	4.00
<b>TOTAL</b>	<b>132.00</b>
- Invoice details: INVOICE NO. 258820, TRAY NO. 9090, RX NO., Entered: 01/16, Shipped: 04/19/24

# STOCK QUOTATION GENERATION [WSR]



From Stock Invoicing <2,6,1>



◆ Stored in the \SANDBOX folder

Stock Invoicing

F1:Clear F2:Delete Item(s) F3>Edit Item F4:Add Misc F5:Add Frame F6:Add Lens F7:Add Note F8:Money F9:Fetch Alt+F2:Reconcile Alt+F9:Pickticket Ctrl+F10:Combob F10:Debit F11:Print Quote F12:Credit Other

Ship Acct#: 1010 FLORIDA OPTICAL Bill Acct#: Account Info | Account Note |  
 Reference: Category: FR (FRAMES)  
 Contact: Route: Invoice Message: 1010 - FLORIDA OPTICAL  
 Tel:503-231-6606  
 6805 SE MILWAUKEE  
 PORTLAND FL 97914  
 U11  
 PList: P4 (Equity 2024 02/12/24)

**FLORIDA OPTICAL**

Services Pricing Job Data  
 Lens PL: Postage (\$):  
 Frame PL: Tax (%): 0.00  
 Misc PL: Lens price column:  
 Quote only Expected BO: 5/ 8/2024  
 Invoice#: Entered: 05/08/24 10:17AM (@@)  
 Remote#: Modified:  
 Origin: VISION Route:  
 Line items: 2 Units filled: 0/13

QOrd	QFil	Reference	Net	Mfr	Frame	Color	Comp	Eye	Bridge	Style	Size	Price	Cost	Bin	Barcode	QOH
3	0			ALTA	2007	LIGHT BROWN		54	19	SKUL	145	55.00	10.00		788678963918	0
10	0			CAPR	21075	(C3) BURGUNDY		53	17	SKUL	145	150.00	33.00		009398228737	0

Reference: Category:  
 Contact: Route: Invoice Message:  
**Quotation order saved as invoice #365514**

**DIGITAL VISION**

SHIP TO: GUY FLORIDA OPTICAL  
 6805 SE MILWAUKEE  
 PORTLAND FL 97914

**U402\* - U11 1010**

ACCOUNT 1010 STOCK ORDER  
 GUY FLORIDA OPTICAL INV.# 365514  
 6805 SE MILWAUKEE REF WS STK  
 PORTLAND FL 97914 INV.DATE 05/06/24

QUANTITY	DESCRIPTION	SHIP	PRICE	AMOUNT	BO	NET
3	2007		55.00	165.00		
	ALTA 54 19 LIGHT BROWN	SKUL 145				
		788678963918				
10	21075		150.00	1500.00		
	CAPR 53 17 (C3) BURGUNDY	SKUL 145				
		009398228737				

**Quote**

Barcode: [Barcode]

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 All rights reserved

QP	@@	CAT	FR	#	PList
INVOICE NO.				365514	
TRAY NO.				65514	
MISC	0				
LENS	0			JS	
FRAME	13			A	

TOTAL → 1665.00  
 \*\* QUOTATION \*\*  
 DATE 05/06/24



# STOCK QUOTATION GENERATION



## From Stock Invoicing

- ◆ Viewable as a Stock Quotation in work-in-process
- ◆ Can return to Stock Invoicing to turn off 'quotation' type and debit the job

The screenshot shows the 'Work in Process' software interface. At the top, there are fields for 'Account' (FLORIDA OPTICAL), 'Tray' (365514), and 'Search'. Below this is 'Account Info' for '1010 - FLORIDA OPTICAL'. A navigation bar includes 'F2:In-Process Jobs', 'F3:Archived Jobs', 'AltF2:Promised In-Process', 'AltF3:Promised Shipped', 'F12:Search', and 'Last Search'. The main area displays job details for '65514 STOCK #365514 WS STK' with a date of '04/29/2024' and time '03:35P'. A 'QUOTATION' label is highlighted in a red box. A 'Stock Order' window is open, showing details for 'Tray 65514', 'Reference WS STK', 'Invoice # 365514', and 'Type Stock Order'. It includes a table with columns 'QOrd', 'QFil', 'Item', and 'Price'.

QOrd	QFil	Item	Price
3	3	2007 ALTA LIGHT BROWN 54 19 SKUL 145/145	165.00
10	10	21075 CAPR (C3) BURGUNDY 53 17 SKUL 145/145	1500.00
Sub-Total			1665.00
TOTAL			1665.00

The screenshot shows the 'Work in Process' software interface with a 'Stock Invoicing' menu open. The menu includes options like 'Cancel', 'View Order', 'Job Screen', 'Add Note', 'Add Hold', 'Phone List', 'Sales Inquiry', 'Accounts Receivable', 'Account Record', and 'Ship Tracking', each with associated keyboard shortcuts.

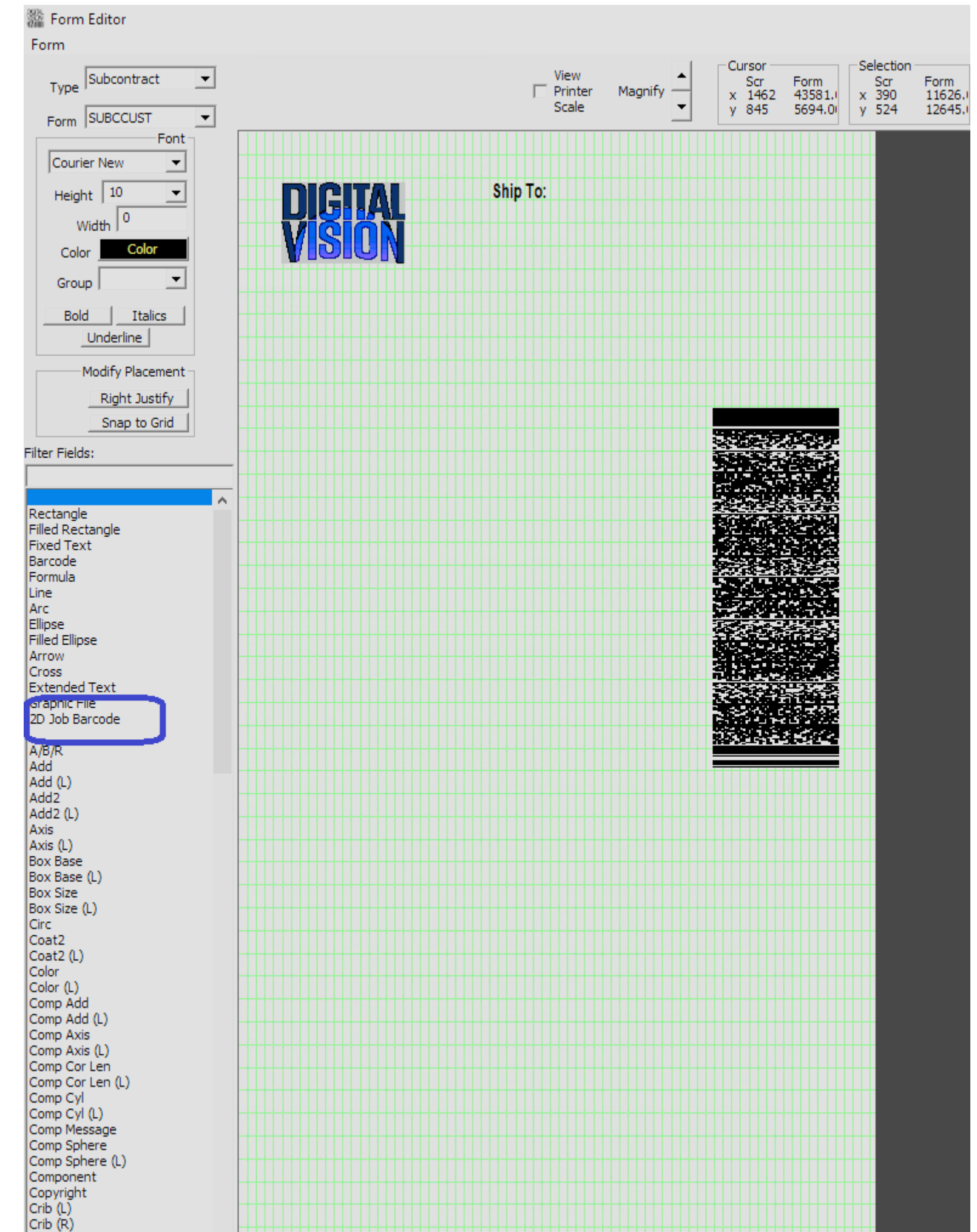
Option	Keyboard Shortcut
Stock Invoicing	ALT+F4
Cancel	ALT+C
View Order	F4
Job Screen	F5
Add Note	F10
Add Hold	ALT+H
Phone List	ALT+E
Sales Inquiry	ALT+S
Accounts Receivable	ALT+A
Account Record	ALT+F5
Ship Tracking	ALT+F9

# SUBCONTRACT USING CUSTOM FORMS

Setup in <4,8,1,1> DVI Setup

- ◆ F2 – Rx Invoicing Tab
- ◆ 2D- Barcode for backward compatibility

Graphic File  
2D Job Barcode

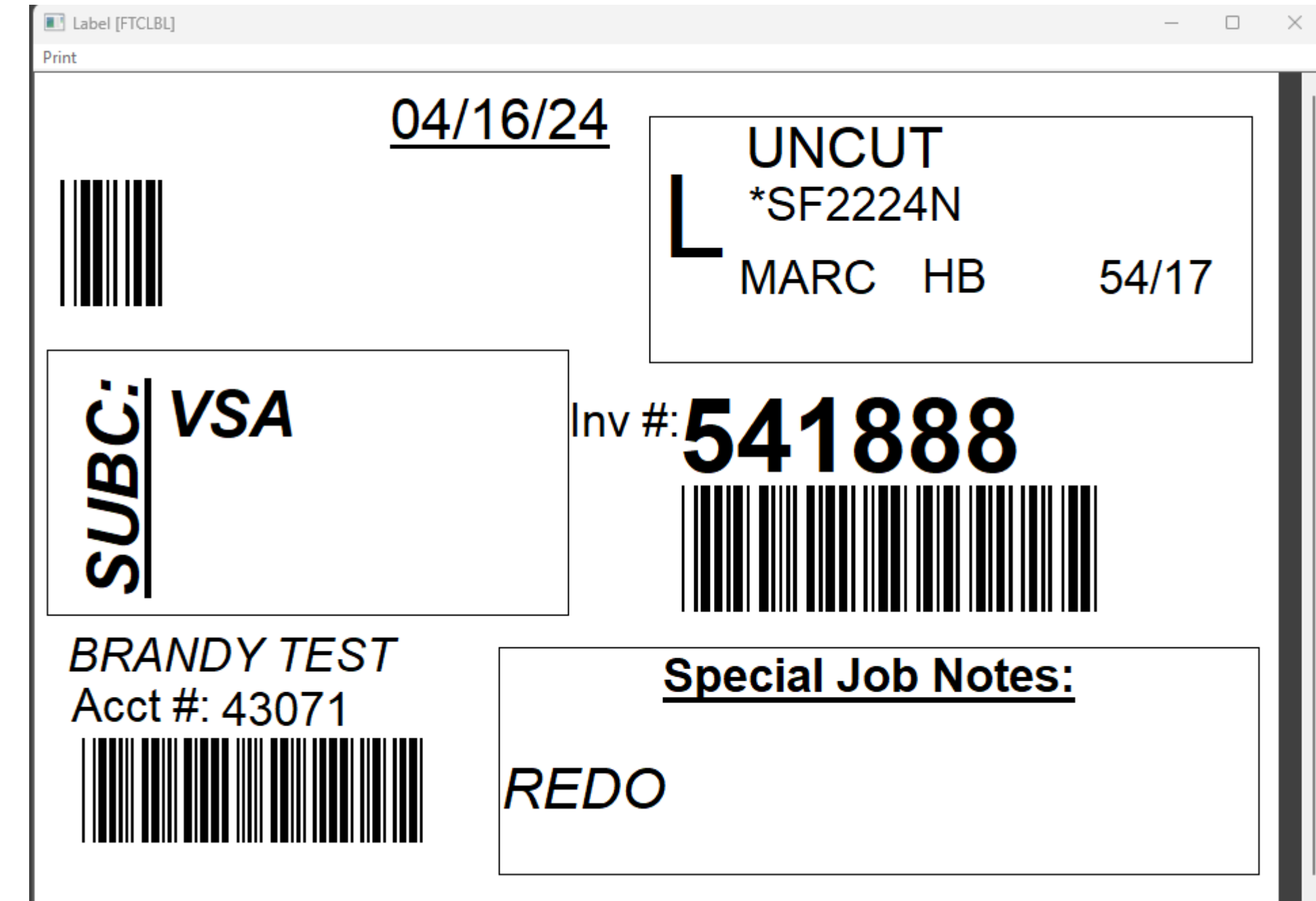
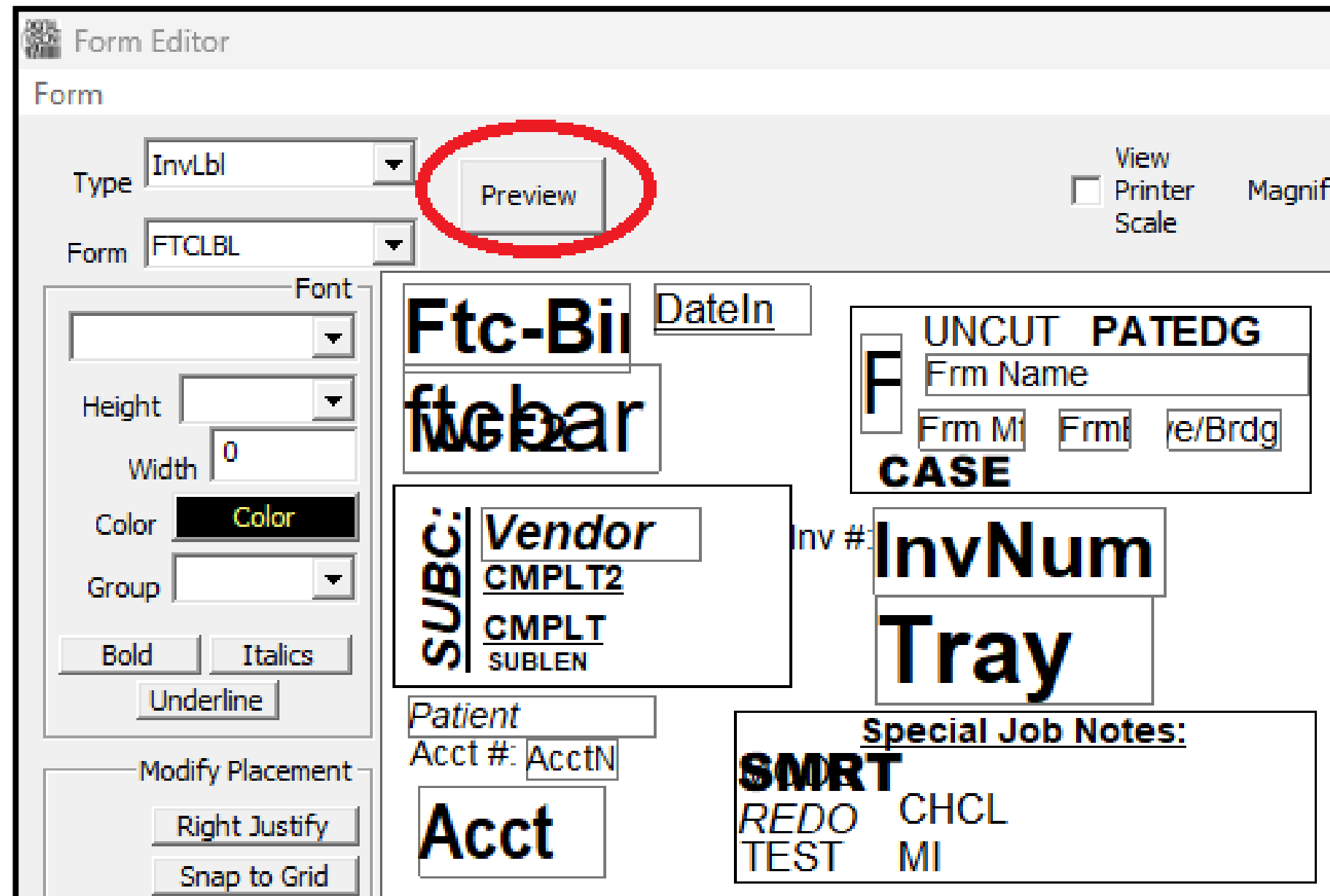


Customizable Invoice	Y	Y=Use customizable invoice (requires Windows printer driver). N=use Postscript invoice.
Customizable RxCredit	Y	Y=Use customizable rxCredit (requires Windows printer driver). N=use Postscript invoice.
Customizable Subcontract Form	Y	Y=Use customizable subcontract (requires Windows printer driver). N=use Postscript subcontract.
Use Enterprise Shipping	P	N=Do not use. I=Create label with invoicing. P=Create label with Packinglists
Prop 65 Print Option	F	N=No print C=Print inv msg for CA poly jobs D=Print msg on ALL CA jobs Y=Print inv msg for all poly jobs L=P=

# LABEL PREVIEW IN FORM-EDITOR [WSR]

Form Type: 'InvLbl'

- ◆ Select Form (Label)
- ◆ Preview -> Enter In-Process Tray



# FORM-EDITOR FIELD FILTER

## ◆ Filter Field List

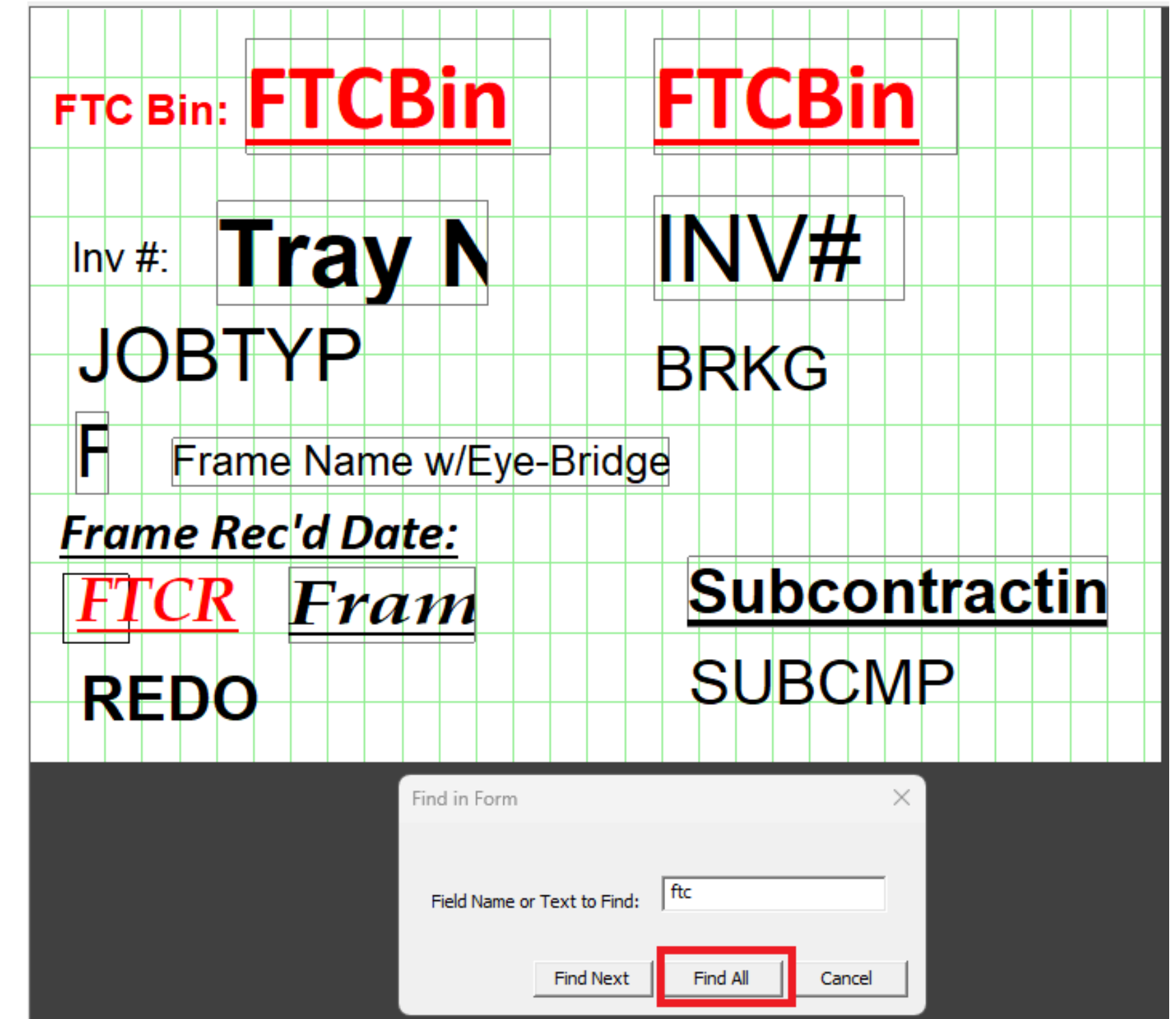
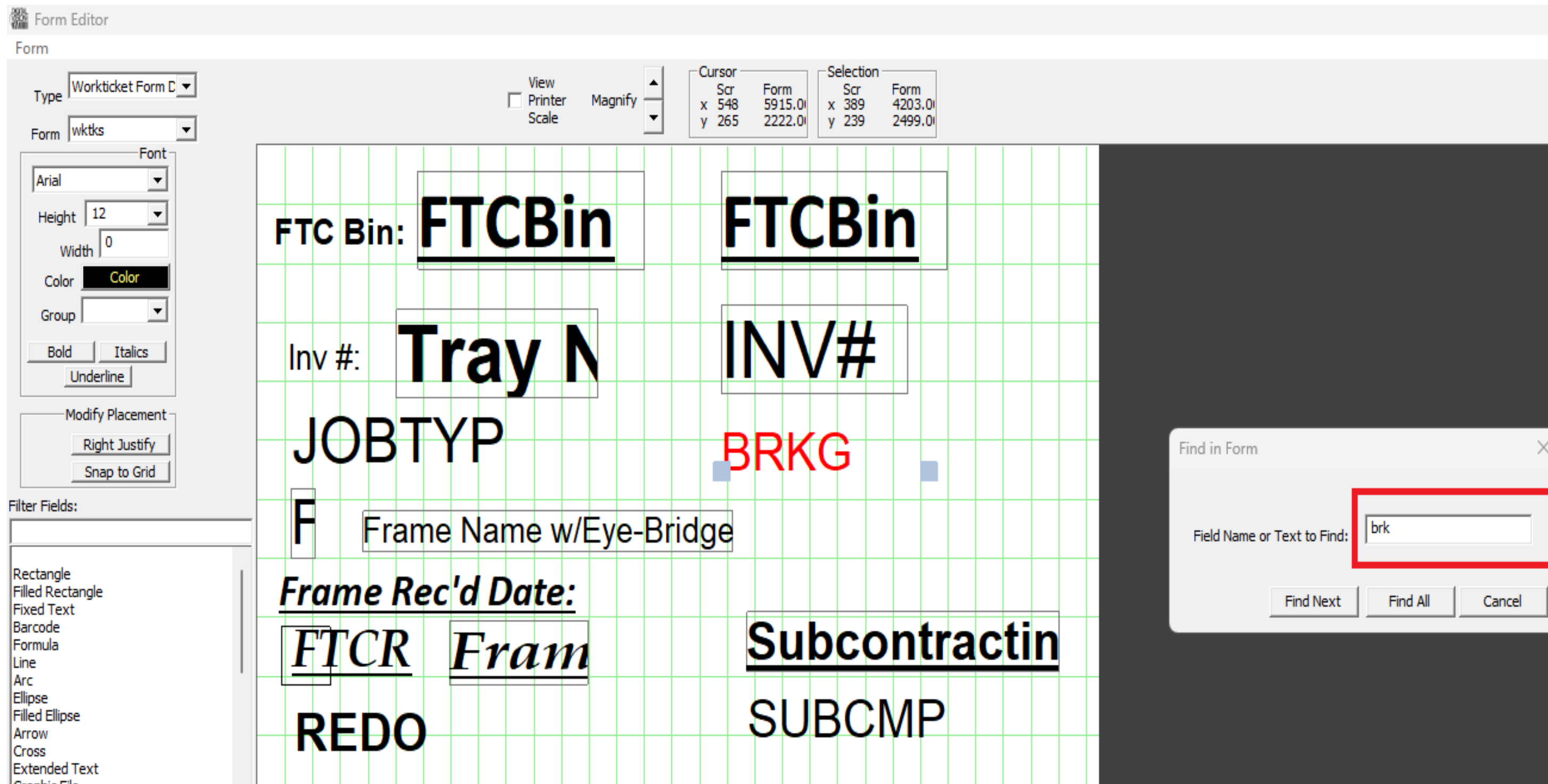
The screenshot shows the 'Form Editor' application window. On the left is a control panel with various settings. The 'Filter Fields:' section is highlighted with a red box and contains the text 'box'. Below it is a list of field types, with the 'A Box' through 'R Base' items circled in red. The main workspace is a grid with several text elements: 'FTC Bin: FTC Bin', 'Inv #: Tray N', 'JOB TYP', 'BRKG', 'F Frame Name w/Eye-Bridge', 'Frame Rec'd Date:', 'FTCR Fram', 'REDO', 'Subcontractin', and 'SUBCMP'. A status bar at the top right shows cursor and selection coordinates.

Cursor		Selection	
Scr	Form	Scr	Form
x 677	7307.0	x 389	4203.0
y 119	3797.0	y 239	2499.0

# FORM-EDITOR SEARCH FORM

## ◆ Find in Current Form

- Control-F OR Form->Search Current Form
- Searches fields placed on form by name and also by filter result



# USING THE FORM EDITOR

## Formulas, barcodes, and graphics

- ◆ Make text conditionally appear on your forms
  - Define logic and desired output text
- ◆ Make graphics appear conditionally
  - Tailor your images to specific circumstances
- ◆ Create barcodes that only show up under certain conditions
  - Define barcode content
  - Apply a formula to the barcode

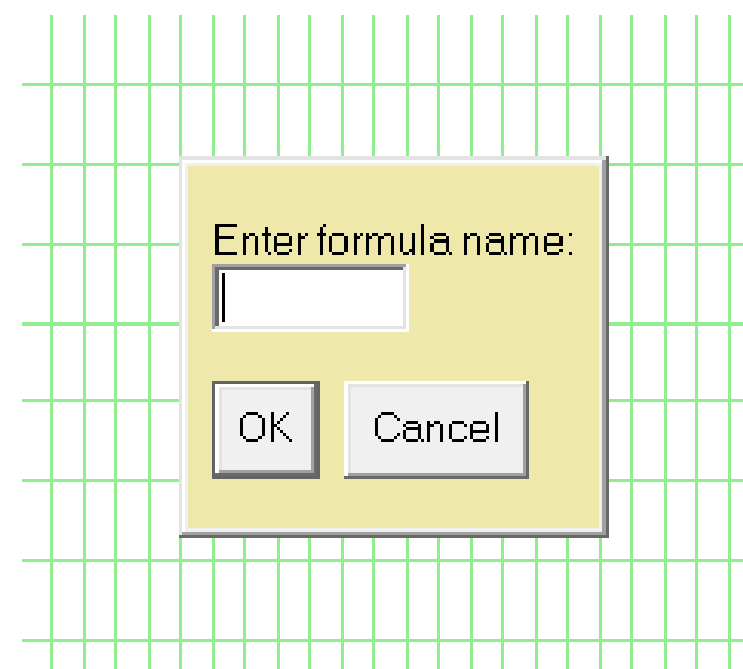
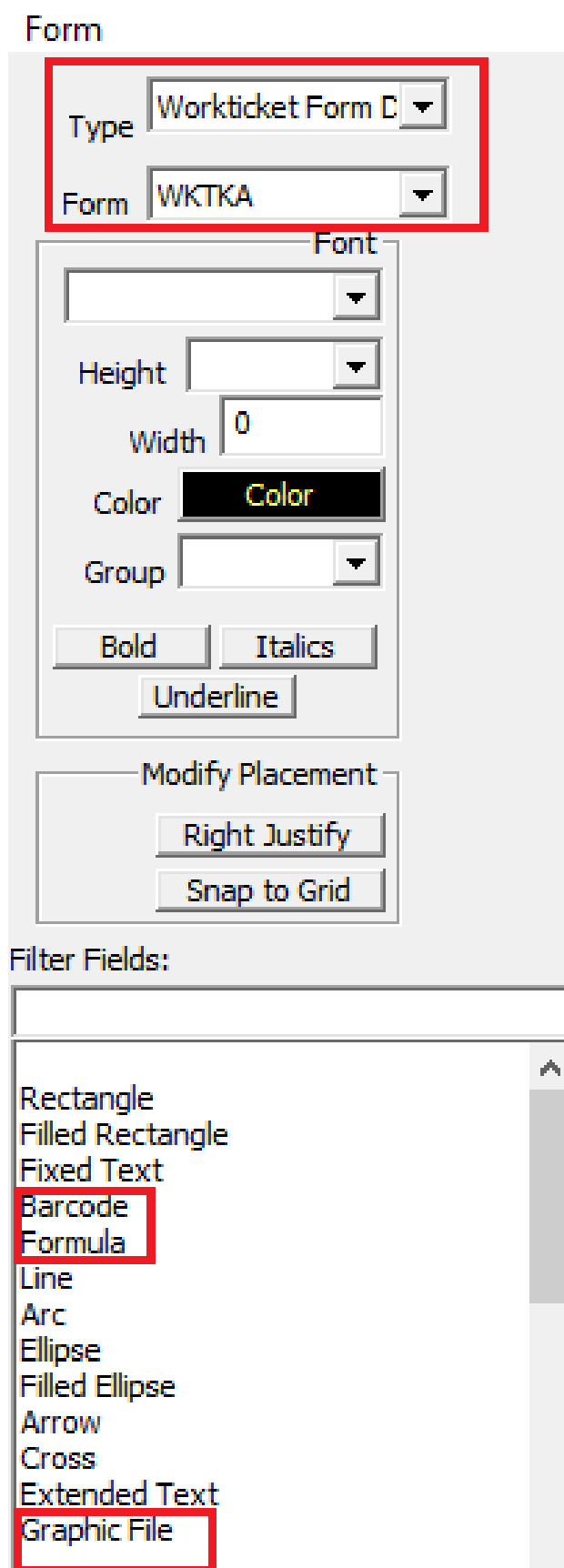
The screenshot displays the 'Filter Editor' interface. At the top, there are two input fields: 'Filter Name' containing 'My Filter' and an empty 'Description' field. Below this is a section titled 'Job Inclusion Criteria' containing a table with four rows. The first row is populated with 'Lens Material' as the Data Type, '=' as the Operator, and 'P' as the Value(s). The other three rows are empty. To the right of the table is a 'Filter Result' dropdown menu showing 'LENS IS PLASTIC'.

	?	Data Type	Operator	Value(s)	Eye(s)
1	?	Lens Material	=	P	
2	?				
3	?				
4	?				

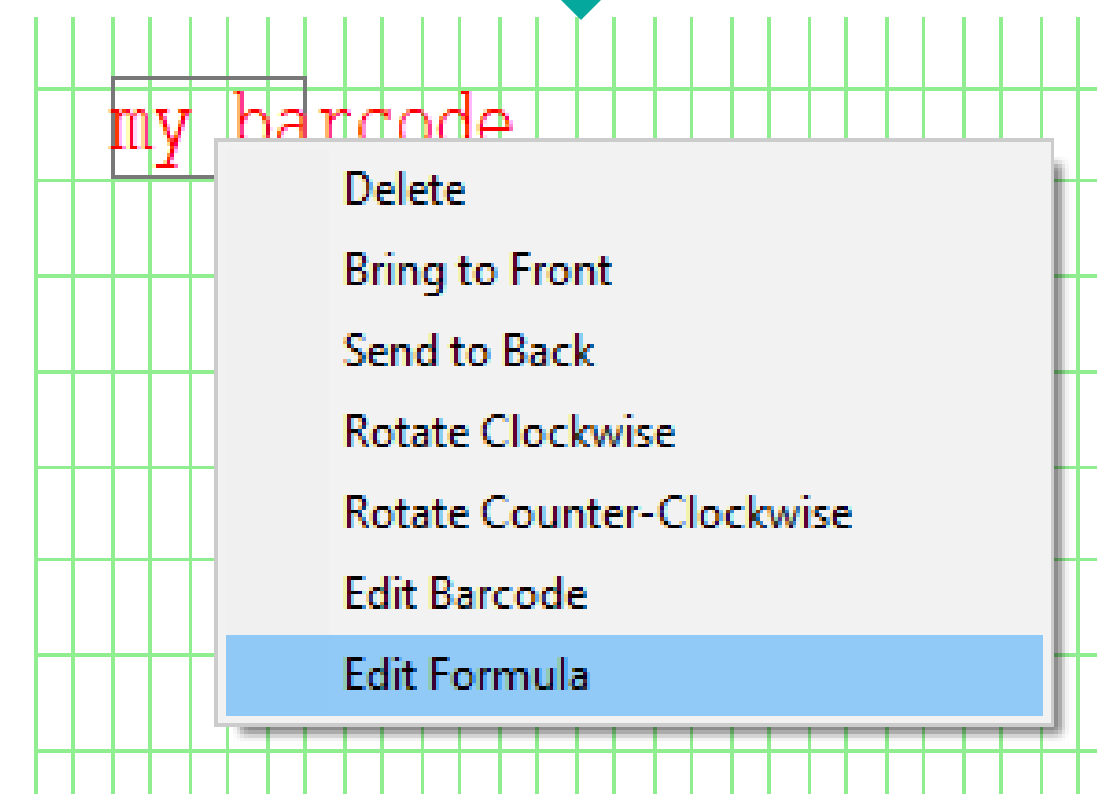
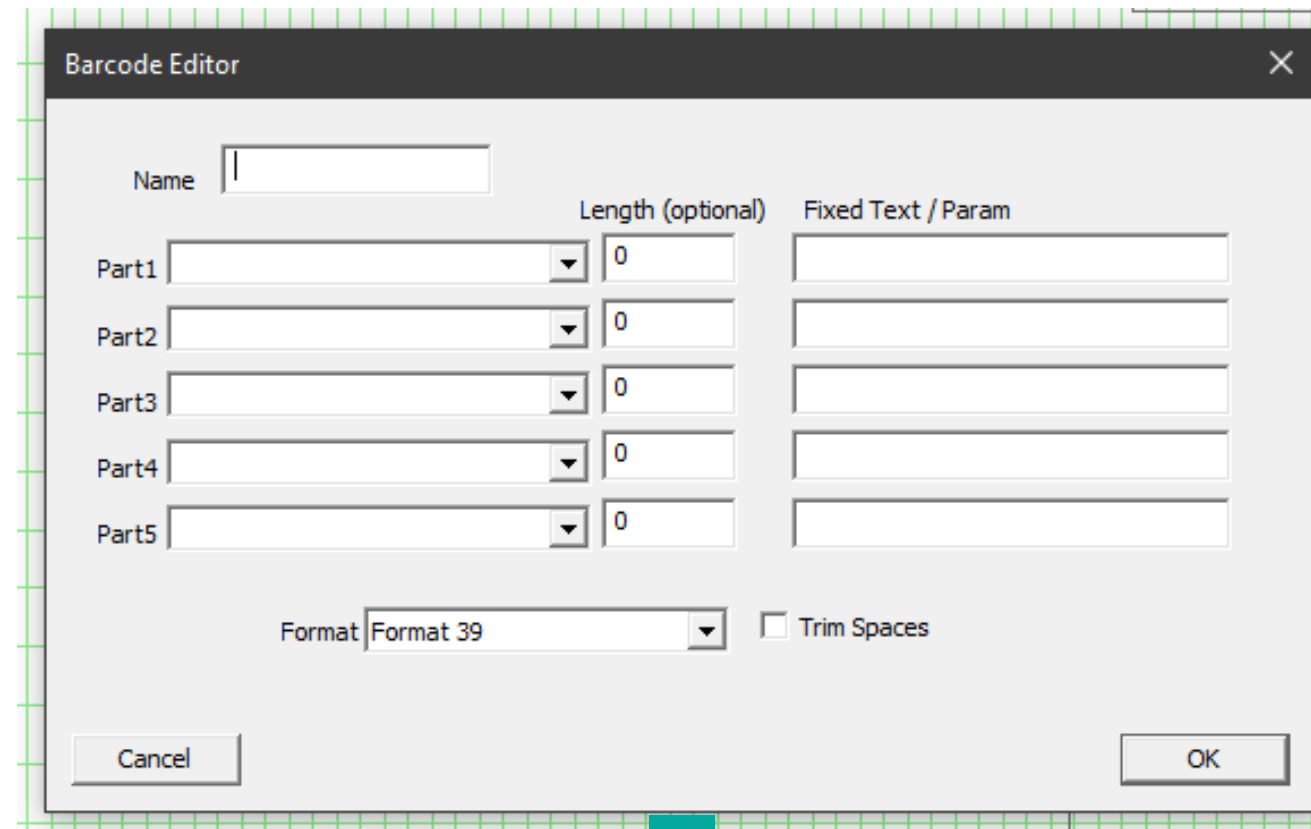
Filter Result: LENS IS PLASTIC

# PLACING YOUR CONTENT

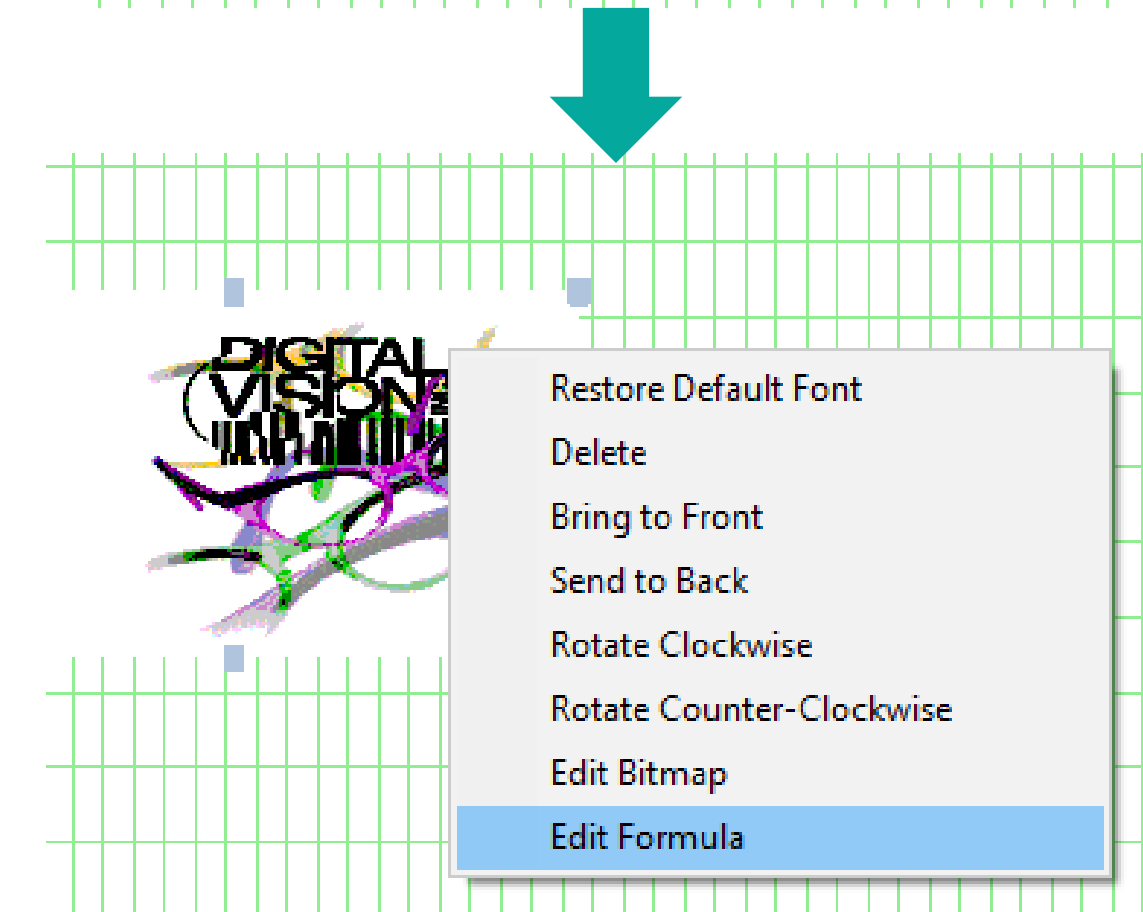
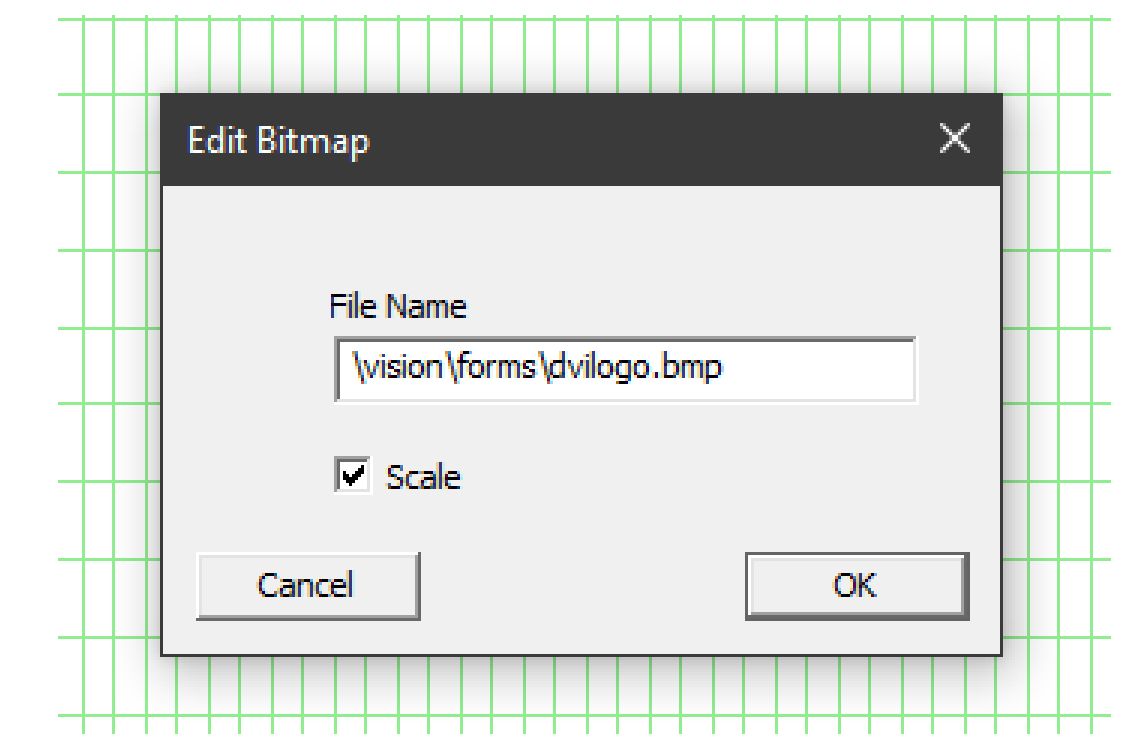
## Text Formula



## Barcode Formula



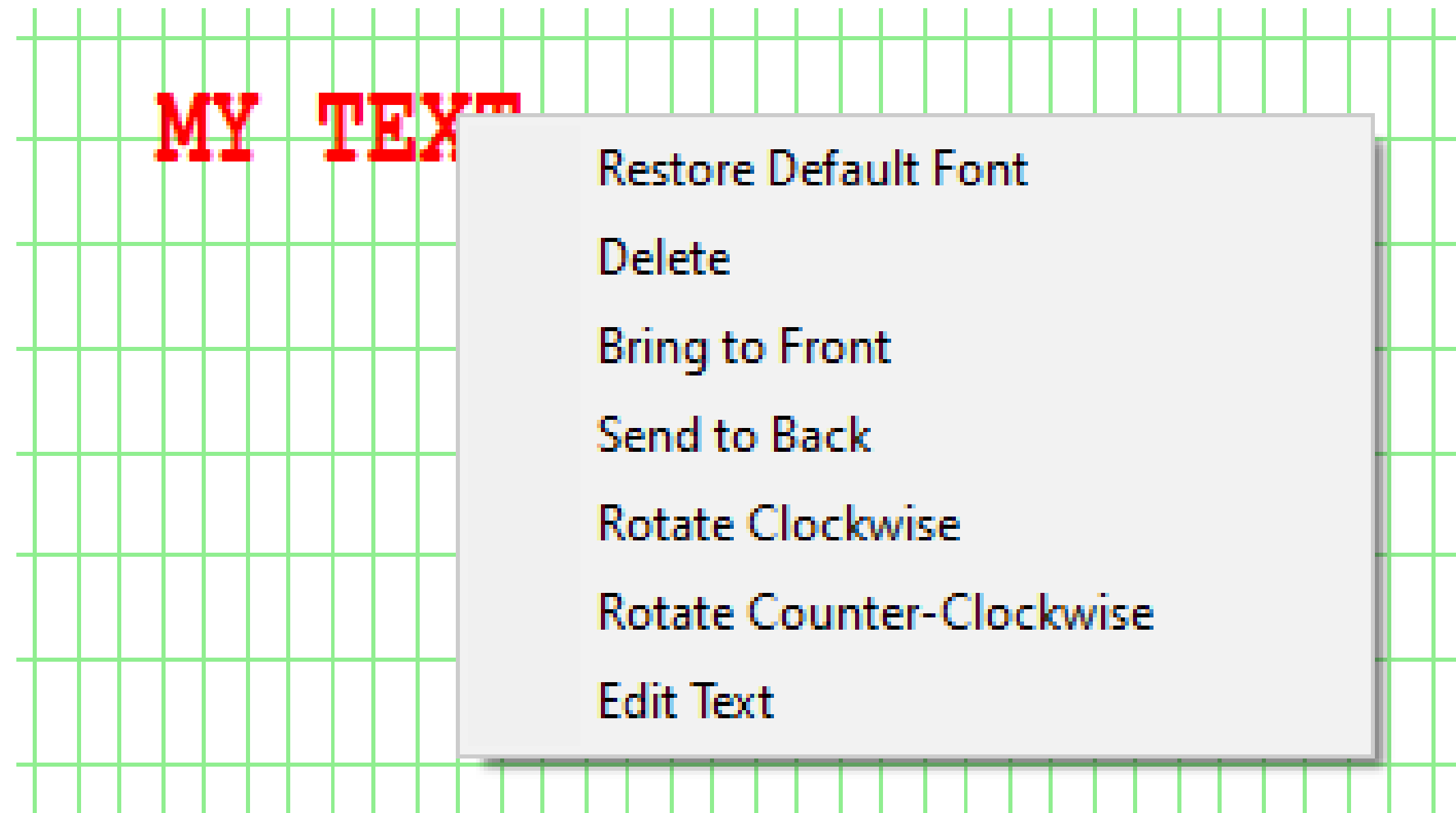
## Graphic Formula



# ROTATING AND LAYERING

## Configuring Your Content

- ◆ Rotate your fields at 90 degree angles
- ◆ Determine which fields get layered on top of others





# WORK TICKET A



## Add fields to WKTKA

- ◆ Not fully customizable, but you can add fields
- ◆ The default fields print on top of everything else
- ◆ Useful for inspection data
  - Power, prism, etc.

\*Postit\*  
no charge redo, last redo should have had xtractive grey not regular transitions 11/13 324774  
23; (SW 12/18 03:19P)

RT LT

TRACER:5 /10 12/21/23

R:26.8/14 27.4/153 24.6/203

0.45 @ -84  
-0.90 -2.02 @ 89

0.56 @ 85  
-1.69 -1.99 @ 102

orig.sph cyl ax hpris vpris  
R -1.75 -2.00 104 U-0.50  
L -1.00 -2.00 88 D-0.50

SHIPPING SHIP BY: AAR 67 67 CRIB

FINISH UNICUT SURFACE ENGRAVE BLOCK 58 58

TPY STOCKROOM TYP MAT/CLR TYP X2G BASE 4.25 ADD 250 OPC 250 PS STEADY PS STEADY LENS

PRE PROD METAL GROOVE GRAPHITE OVAL 51 / 18 \*3905

44086

# NO MORE POSTSCRIPT



- ◆ PostScript forms are unsupported moving forward
- ◆ All DVI Forms now use GDI
  - Compatibility with printers
  - Allows for customization of forms
- ◆ Make sure stock ticket, subcontract, and credit forms are updated <4,8,1,1>
- ◆ Other forms are automatically updated
  - Redirector labels
  - Packing list
  - Stock pick ticket

## F2: Rx Invoicing

Suppress Printing of Contact Labels	N	N
Customizable Invoice	Y	Y
Customizable RxCredit	Y	Y
Customizable Subcontract Form	Y	Y

## F4: Stock Invoicing

Short Misc	N
Customizable Stock Ticket	Y
Stock Redirect Lab#	0

FORM	CUSTOM FORM IN <541>
INVOICE	INVCUST
RXCREDIT	CREDCUST
SUBCONTRACT	SUBCCUST, SUBCCUSTA
STOCK TICKET	STKCUST

**DIGITAL  
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**THANK YOU**

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