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VisionWeb Integration

In this section we will discuss the setup process for integrating VisionWeb with the Crystal Practice Management Software. This integration will allow you to order glasses from your VisionWeb approved labs directly from the Crystal Practice Management software. Please make sure you have a VisionWeb account with your lab supplier(s) configured in VisionWeb. If you do not have an account with VisionWeb or need assistance with configuring your Lab supplier(s), please contact VisionWeb at **(800) 874-6601**.

To begin the integration process you will first need to navigate to the admin (1) section of Crystal then down to VisionWeb (2). Please refer to the example below.

The screenshot shows the Crystal PM software interface. The 'Admin' menu item is highlighted with a red box and a red arrow labeled '1'. Below the main menu, the 'Billing' section is expanded, and the 'VisionWeb' menu item is highlighted with a red box and a red arrow labeled '2'. The main window displays a table of billing codes with columns for Bill, Proc, Q, Ti, Description, Category, Tax, O, R, Fu, Fr, M, Pl, Ty, and Fee. Below the table, there are buttons for 'Create New Bill Code', 'Print to File', 'Import File', and 'Find'. A 'Categories' list is visible on the right, including 'NONE', 'Contact Lenses', 'Professional Services', 'Ophthalmic Lenses', and 'Miscellaneous'. At the bottom left, the status bar shows 'No Patient Selected'.

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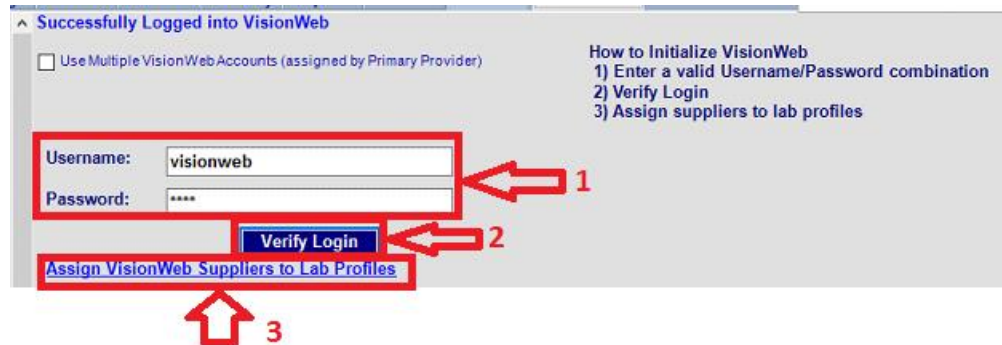
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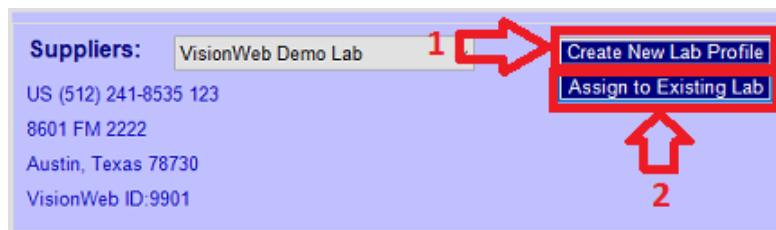
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Once you are in the VisionWeb section you will need to enter your VisionWeb Username and Password (1) then press the **Verify Login** button. If the Username and Password were entered correctly you will see a line that says **Assign VisionWeb Suppliers to Lab Profiles**. Please refer to the example below.



You will need to click on **Assign VisionWeb Suppliers to Lab Profiles**. This will give you a list of your lab suppliers that are setup in Vision Web. If your lab suppliers are not listed in the dropdown then you will need to contact VisionWeb.

Now you want to link the VW suppliers with your labs in Crystal that are configured in Inventory – Optical Labs. If your labs are not set up in Crystal, you can click **Create New Lab Profile (1)** and this will set up a new lab here. You must leave the VisionWeb tab in Crystal and return for the change to take place. Once this is done, click **Assign to Existing Lab (2)** and choose the lab that corresponds with the supplier in the dropdown. Please refer to the example below.



You now have a couple of further setup options. You can, if you like, program the Frame Page Defaults with VisionWeb values so that you can have information pull across from VisionWeb in to Crystal. Doing this will easily facilitate the creation of the routing slip used for creating the invoice.

You can also decide not to program the Frame Page Defaults section. Opting to not set up the Frame Page Defaults section with VisionWeb values will require you to configure your lenses and options on VisionWeb. After you have submitted your order through VisionWeb you will then need to go back in to Crystal and manually select your lens options in order to have the routing slip populate.

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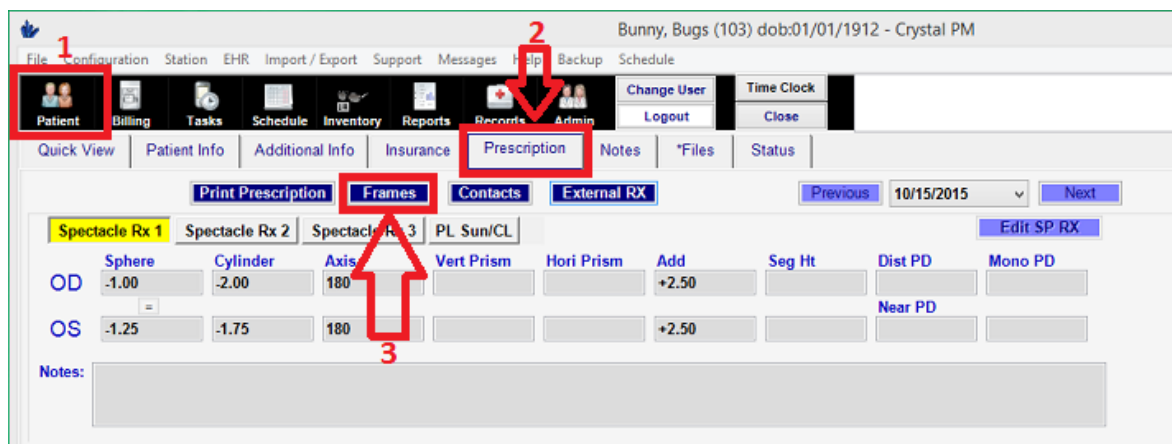
If you wish, you can link VisionWeb values to the Frame Page Defaults so that a routing slip will populate after you create your Spectacle Lab order. To set up this kind of functionality you will need to follow the directions listed below.

You will want to go through an entire VisionWeb order, making notes of EXACTLY how your lab suppliers have the different lens options listed. Once you have the EXACT listings of options from VisionWeb, come back into Crystal and navigate to Admin – Defaults – Frames Page Defaults. Here you will go through each section, clicking “Add Item” to add an option from VisionWeb. Be sure your spelling, capitalization and punctuation are EXACTLY the same as in VisionWeb.

When adding your options in Crystal, keep in mind what section you are adding them to. The options in the Lens Design section in VisionWeb should be placed in the Description section of the Frame Page Defaults in Crystal. The options in the Lens Material section of VisionWeb should be placed in the Materials section of the Frame Page Defaults in Crystal and the options in the Available Treatment section of VisionWeb should be place in Coating 1 in Crystal.

Once you have the item(s) added, you now want to link billing codes to them by clicking “Add Billing Code”. The process for linking bill codes is described earlier in this guide. If you need a more detailed guide on linking bill codes and setting up the Frame Page Defaults please refer to the Complete Optical Set up Guide or Spectacle Order Setup Guide. Once completed, when you configure your lenses on VisionWeb the options will import back in to the in to your spectacle lab order screen.

Once you have configured your labs and potentially the Frame Page Defaults, you can now go and test the functionality of the VisionWeb integration. To do so you will need to navigate to the Patient section (1) of Crystal then to the Prescription tab (2). Once you are in the Prescription tab you will need to press the Frames button. Please refer to the example below.



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Once you have pressed the Frames button, the Spectacle Lab Order screen will open. From here you will need to press the New Order button (1). Please refer to the example below.

A screenshot of the "Spectacle Lab Orders" software interface. The form contains fields for Patient (Bunny, Bugs), DOB (01/01/1912), Gender (M), Contact # (Cell Phone, (954) 111-1111), Lab/Vendor (VisionWeb Demo Lab), Lab Contact #, Lab Order #, Dispense Date (Not Dispensed), Acct ID (10003), Order Date (10/15/2015), Authorization #, Optician/Staff, Ordered/Ref.#/Date, Expected Date (10/29/2015), Status, and Provider (Dr. Roscher, Adam). A red box highlights the "New Order" button, which is labeled with a red "1" and a red arrow. Other buttons include "Edit", "Remake", "Print Order", "Opt.", "Dispense", "DVI Remo", "View Log", "Save for VSP", and "Go to Billing Page".

Under the **Lab/Vendor** dropdown (1), choose one of your VisionWeb labs. You should now see a larger blue box for **Configure Lens on VisionWeb (2)**. Click this button. Please refer to the Example below.

A screenshot of the "Spectacle Lab Orders" software interface. The form contains fields for Patient (Bunny, Bugs), DOB (01/01/1912), Gender (M), Contact # (Cell Phone, (954) 111-1111), Lab/Vendor (VisionWeb Demo Lab), Lab Contact #, Lab Order #, Spectacle Rx 1, Spectacle Rx 2, Spectacle Rx 3, PL Sun/CL, Order Date (11/13/2015), Authorization #, Optician/Staff, Ordered/Ref.#/Date, Expected Date (11/27/2015), Status, and Provider. A red box highlights the "VisionWeb Demo Lab" dropdown menu, labeled with a red "1" and a red arrow. Below the form is a table for lens prescriptions with columns for Sphere, Cylinder, Axis, Vert Prism, Hori Prism, Add, Seg Ht, DPD, and Mono PD. There are also fields for Frame Selected (Frame Order, Frame UPC, Manufacturer, Collection, Name) and Lens Selected (Lens Type, Description, Material, Tint, Edge). A red box highlights the "Configure Lens on VisionWeb" button, labeled with a red "2" and a red arrow. Other buttons include "Save", "Go to Billing Page", and "Estimated Bal Total: \$0.00 Insurance".

Once you press the **Configure Lens on VisionWeb** button a VisionWeb screen will open allowing you to configure and order your lenses from your selected lab supplier.

Go through the ordering process, selecting your lens options and entering in any information relative to the order. Once you are done entering in the information and submitting the job, a window will open up showing you a list of values that be transferred from VisionWeb in to your order inside of Crystal. Please refer to the example below.

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A screenshot of a software window titled "Verify Changes". The window contains a table with four columns: "Label", "Crystal PM Value", "VisionWeb Value", and "Saved Value". Each row represents a different field, and each value cell has a right-pointing arrow. At the bottom of the window, there are two radio buttons: "Changed Values (ignore blanks)" (which is selected) and "Show All". An "Update Order" button is located in the bottom right corner.

Label	Crystal PM Value	VisionWeb Value	Saved Value
VisionWeb Status		SENT: Sending the	SENT: Sending the
Vw Order ID		SP205ELK	SP205ELK
OD Sphere		-01.00	-01.00
OD Mono PD		32.00	32.00
OS Sphere		-01.00	-01.00
OS Mono PD		32.00	32.00
Fr. Man		Luxottica	Luxottica
Fr. Collection		Ray Ban	Ray Ban
Fr. Name		RB 5555	RB 5555
Fr. Color		Blk	Blk
Fr. Material		Metal Edge	Metal Edge
Eye		52	52
Dbl		15	15
Tmpls		145	145
A		52	52
B		32	32
ED		52.00	52.00
Lens Type		Single Vision	Single Vision
Lens Desc		Single Vision	Single Vision
I Material			

Once this window open, all you will need to do is press the **Update Order** button located at the bottom right corner of the window. Doing so will transfer information from VisionWeb in to Crystal. If you have linked VisionWeb values in to the Frame Page Defaults section in Crystal, then all you will need to do is verify that the information is correct on the order and press the **Save** button. Doing so should open up the routing slip and allow you to proceed with the billing process

If you have not linked VisionWeb values to the Frame Page Defaults section in Crystal then you will need to go through the order and replace whatever values transferred from VisionWeb with the values from the drop down boxes in the order page inside of Crystal so that a routing slip populates after you save the order. Once you are done press the **Save** button.