STEP BY STEP

# Quick Start Guide

Start Placing Orders in the Wink of an Eye!

# Welcome to Abby!

I'm so happy that we will be working together!

This guide will give you all of the information that you need to set up, manage, and place orders through your new account.

Need more help? Feel free to reach out to your designated Account Manager or contact an Abby Advisor by emailing HELP@HELLOABBY.COM.

All the best,

Abby

# Choose a Topic

## Getting Started



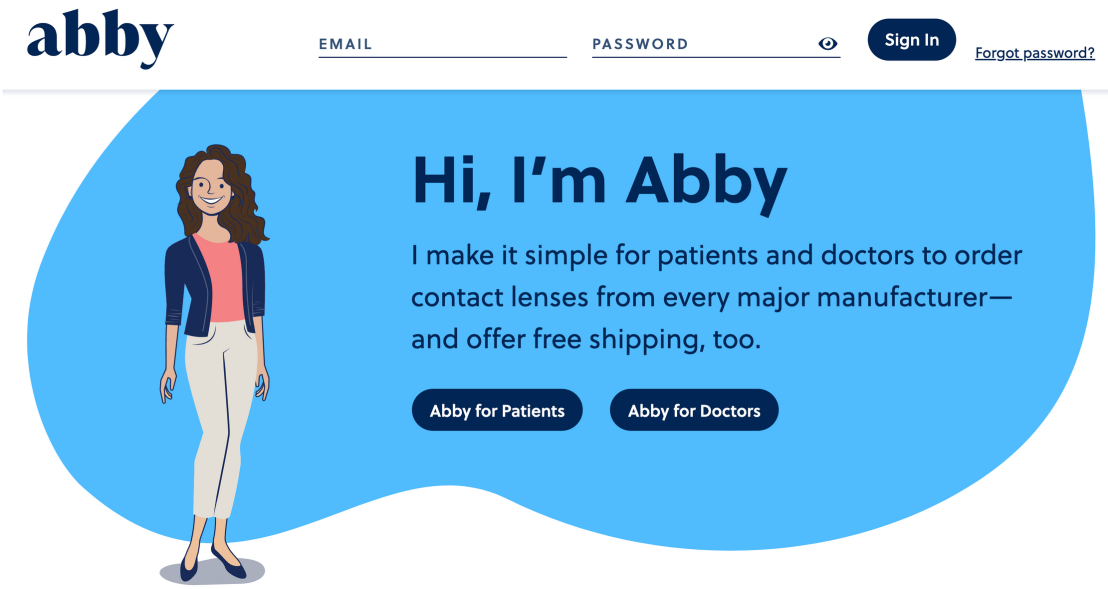
Click any topic to jump to the directions.

## More Resources



## Log-in to Your Abby Account

1. Use any browser to navigate to www.helloabby.com.
2. Input your username and password. Choose 'Forgot password?' if you need to reset your password.

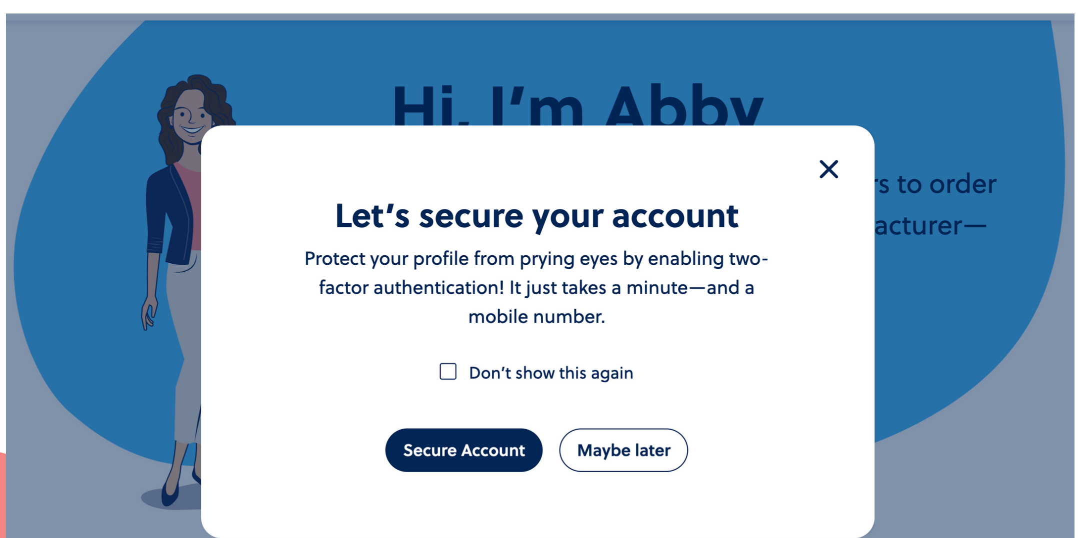



## Set Up 2-Factor Authentication

When you first log-in to your account, you will be prompted to set up 2-factor authentication to make your account more secure. **Please note**: you will need to enter a one-time code upon logging in.

**To secure your account**: Click 'Secure Account' to provide a mobile number for the 2-factor authentication. You will be receive text messages with an access code when your account is accessed, to provide an additional layer of security.

**To skip or do this late**r: Choose 'Maybe later'. You will see the prompt again the next time you log-in to your account.

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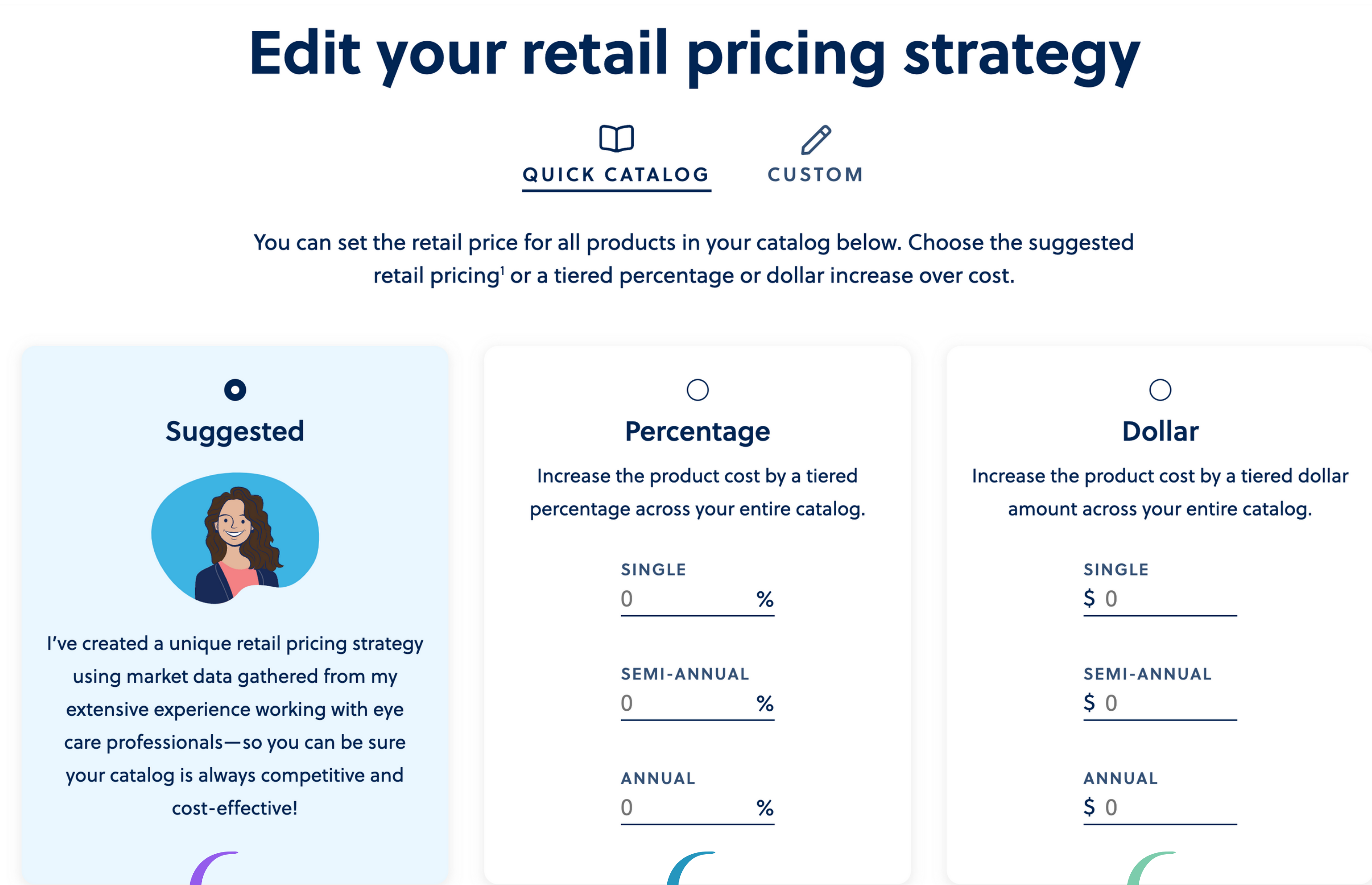
# Set Retail Pricing Using the Quick Catalog Feature

The **Quick Catalog** feature allows you to set the retail price for all products in your catalog. You can choose the suggested retail pricing or a tiered percentage or dollar increase over cost.

1. Click the down-facing arrow next to your account's name, at the top right of the page.
2. Click 'Manage Account.'
3. Look for the blue box on the left side of the page. Click 'Edit Pricing.'
4. Click 'Quick Catalog'.




**This option is based on market pricing data. Using this option allows you to set your pricing to be both effective and competitive to other practices.**

**This option allows you to increase the product cost by a tiered percentage across your entire catalog.**

**This option allows you to increase the product cost by a tiered dollar amount across your entire catalog**

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# Set Retail Pricing Using the Quick Catalog Feature

## To use Suggested Pricing

1. Click the circle in the 'Suggested' box. The selected option appears in blue. (1)
2. Click 'Save'. (2)
3. Confirm your changes by viewing the green confirmation message at the top. (3)

Pricing strategy has been updated. **3**

**1**

**Suggested**

I've created a unique retail pricing strategy using market data gathered from my extensive experience working with eye care professionals—so you can be sure your catalog is always competitive and cost-effective!

**Percentage**

Increase the product cost by a tiered percentage across your entire catalog.

SINGLE
0 %

SEMI-ANNUAL
0 %

ANNUAL
0 %

**Dollar**

Increase the product cost by a tiered dollar amount across your entire catalog.

SINGLE
$ 0

SEMI-ANNUAL
$ 0

ANNUAL
$ 0

**Be sure before your switch!** If you currently have a custom strategy, all price settings will be lost.

**2** Save Changes

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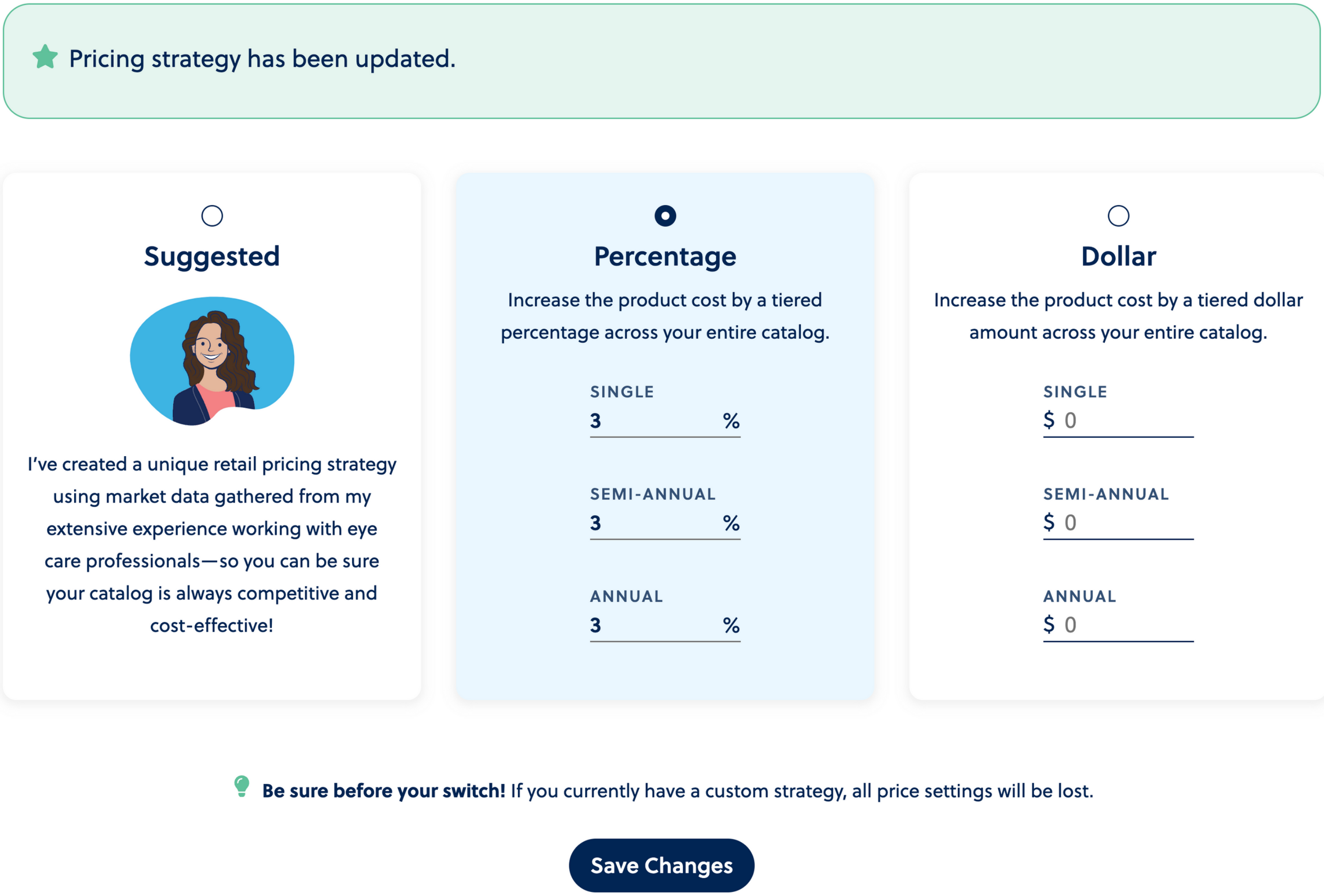
# Set Retail Pricing Using the Quick Catalog Feature

## To use Percentage or Dollar Pricing

1. Click the circle in the 'Percentage' or 'Dollar' box. The selected option turns blue.
2. Type in the desired percentage or dollar increases. The new pricing will be applied to all products.
3. Click 'Save'. (2)
4. Confirm your changes by viewing the green confirmation message at the top. (3)

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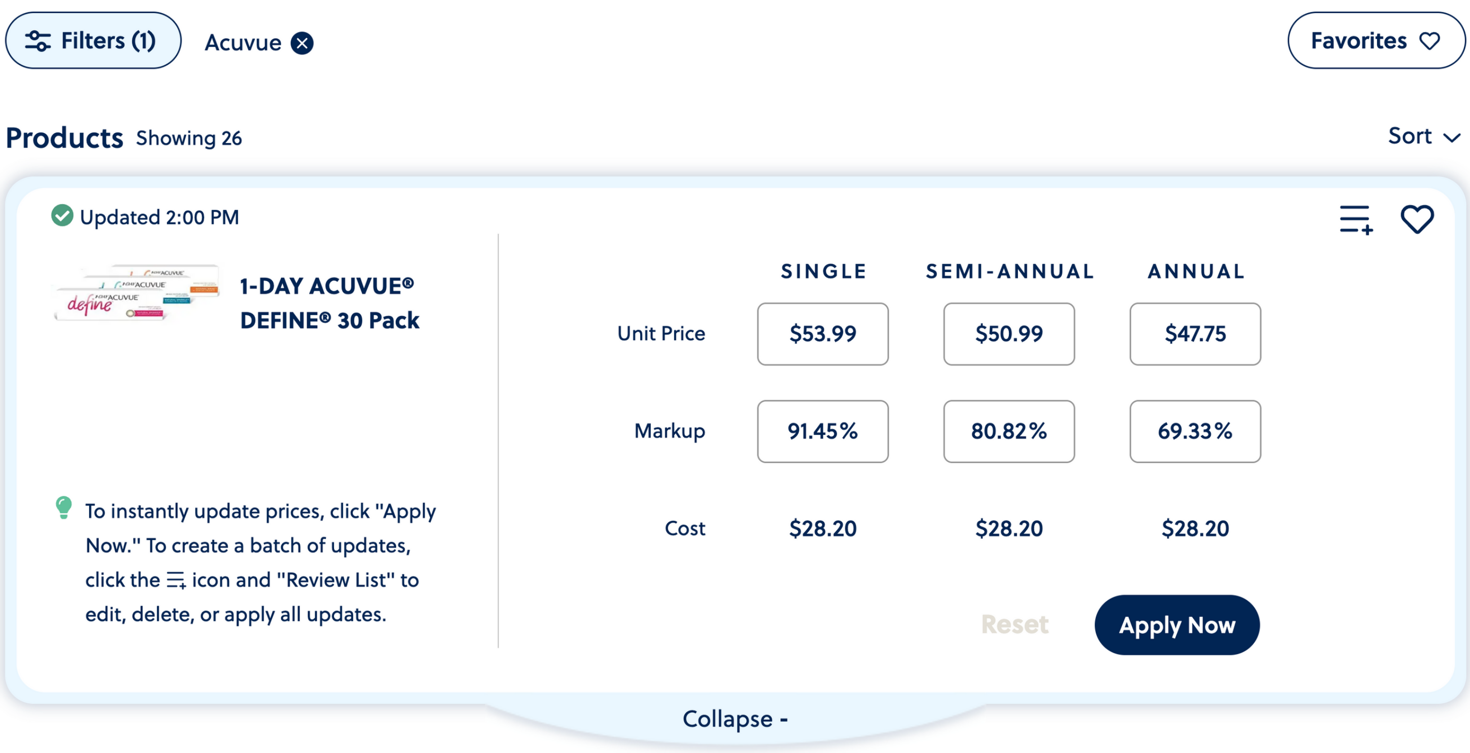
# Set Retail Pricing Using the Custom Pricing Feature

The Custom Pricing feature allows you to make tiered adjustments to the unit price and markup of each product. If you'd like to change the price of a SINGLE product, use this feature.

1. Click the down-facing arrow next to your account's name, at the top right of the page.
2. Click 'Manage Account.'
3. Look for the blue box on the left side of the page. Click 'Edit Pricing.'
4. Click 'Custom'. The card shown is an example of the custom pricing feature.
5. Scroll down and click 'Customize Pricing' in the dark blue box.
6. Type in a name to search or click a product card to choose a product.
7. View the list of products that match your search terms. Click the + sign to expand the options.
8. Make updates to the pricing for any or all of the options (single, semi-annual, annual).
9. Click 'Apply Now.'
10. Check the top left corner of the product card to ensure the changes have been saved. Look for the green check mark and 'Updated (time)'
11. Repeat these steps to change the price of other products.

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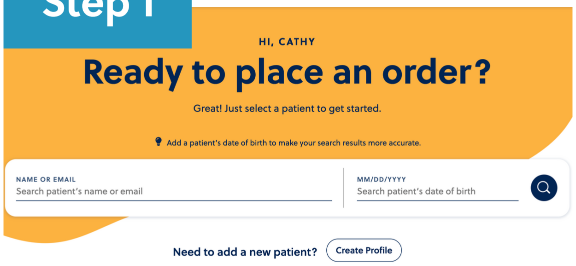
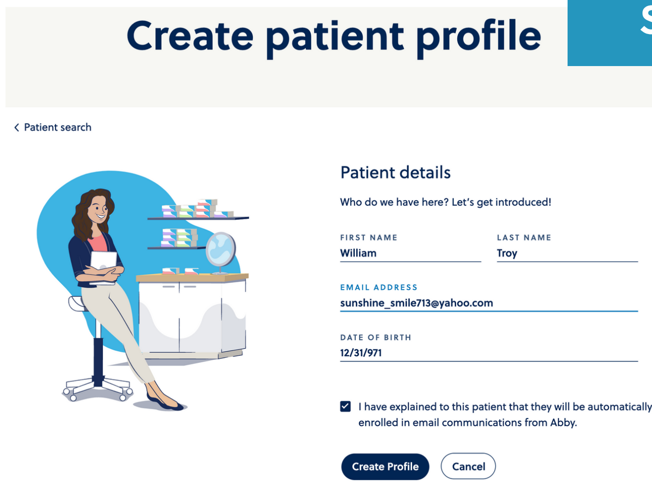
# Add a New Patient

1. Click 'Create Profile.'
2. Add the patient's details.
3. Click 'Create Profile' to save the patient's details; add the shipping address on the next screen.

**Step 1**




**Steps 2-3**

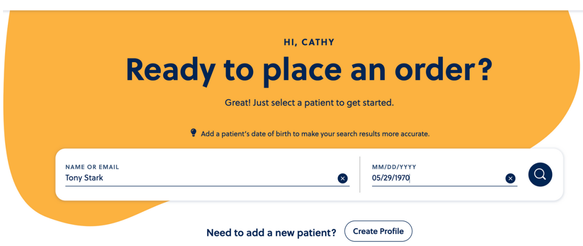



Make sure to let your patient know that they will receive communications from Abby!

# Search for a Patient

You can search for a patient using their name, email address, and/or date of birth.

1. Input the patient's full name, email address, and/or date of birth. Click the search glass.
2. Choose a patient from the list.

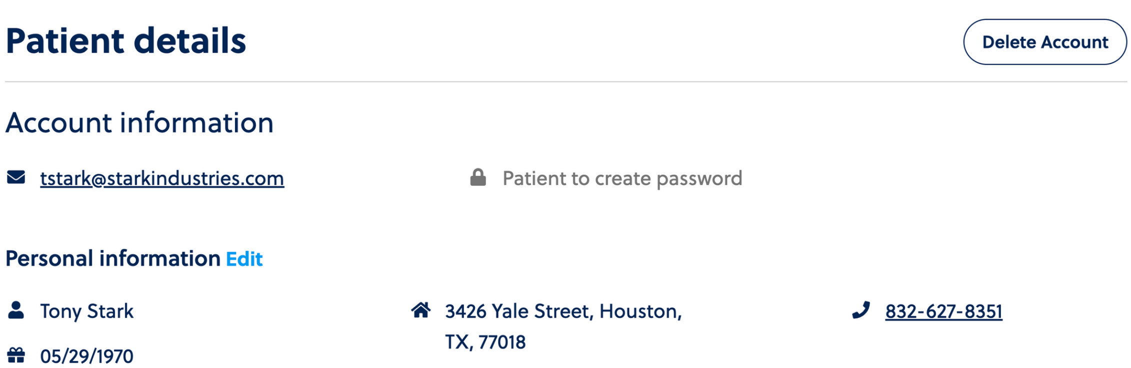



**Step 2**


Using both the patient's name and date of birth will narrow your selections, making it easier to find the exact match!

# Edit a Patient's Account

1. Search for a patient using their name, email address, and/or birthday.
2. Choose the patient from the list of options.
3. Click 'Edit' next to the patient's personal information to make changes.

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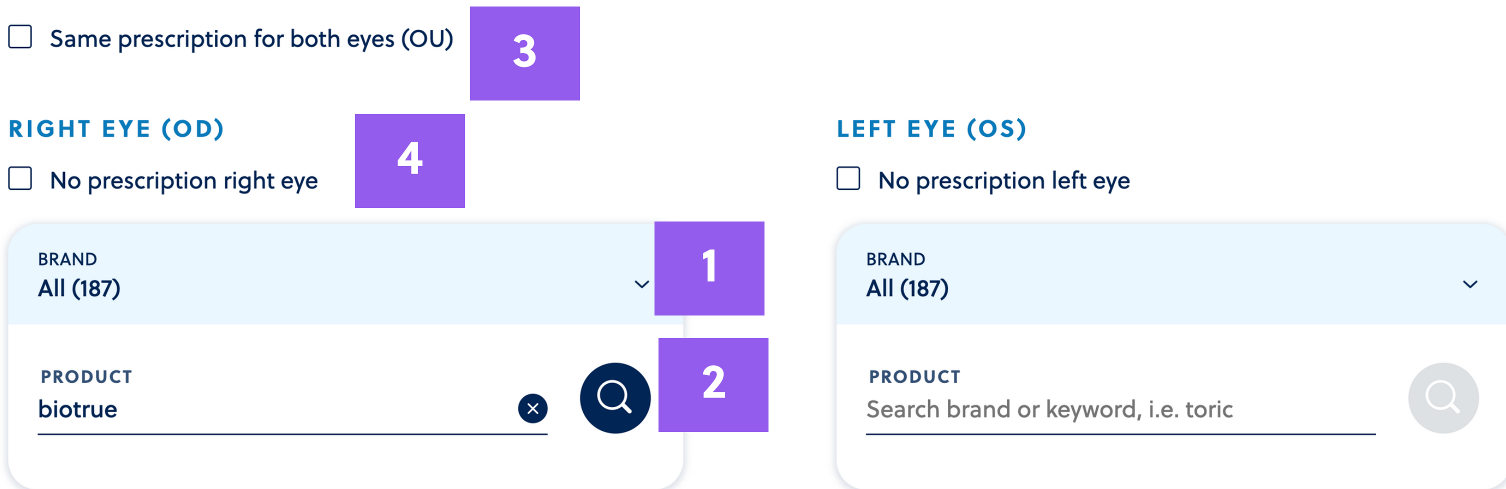
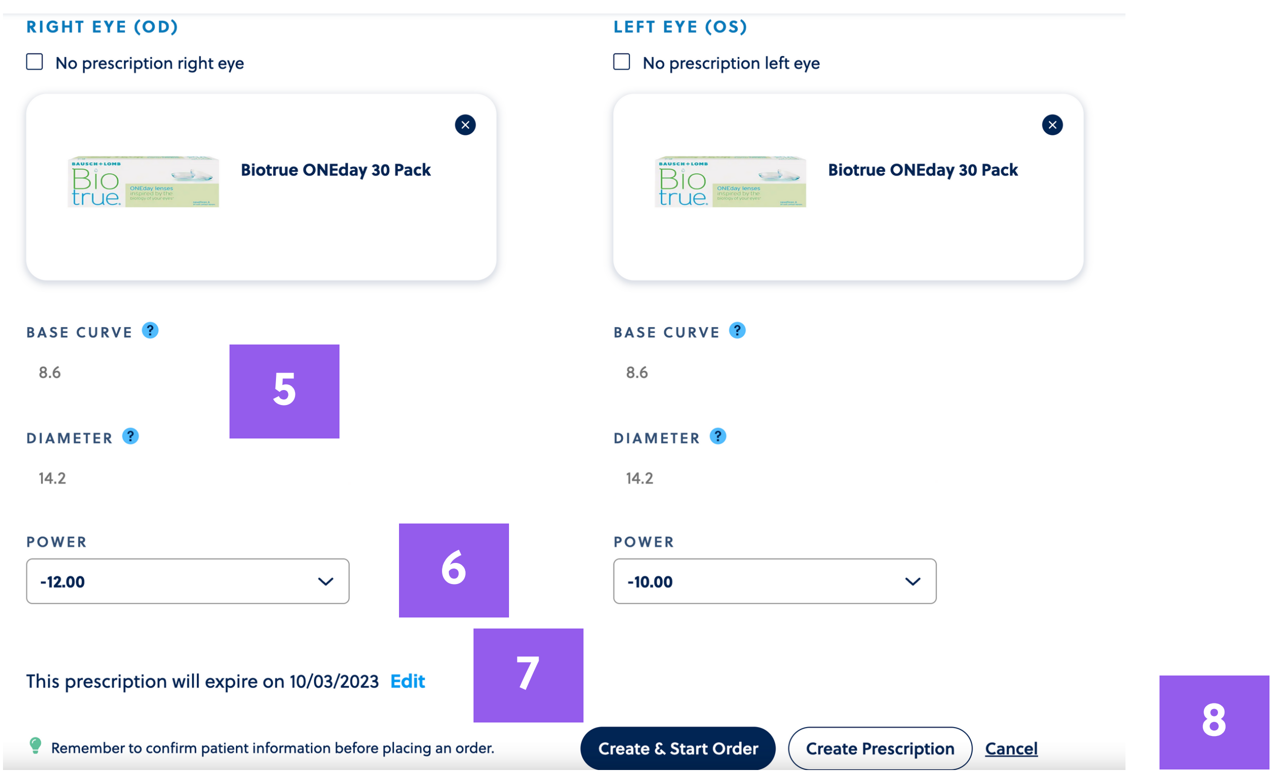
# Add a New Prescription

1. Create a new patient profile or search and select an existing patient's profile.
2. Click 'Add new prescription.'
3. Search for the customer's prescription by brand and/or product (**1 / 2**). Set the same prescription for both eyes by selecting the box at the top (**3**).
4. Indicate if an eye does not have a prescription (**4**).




5. Review the Base Curve and Diameter, which are set according to the product's features. (**5**)
6. Select the power. (**6**)
7. Click 'Edit' next to the prescription expiration date to update. (**7**)
8. Click 'Create & Start Order' to immediately place an order. Or, choose 'Create Prescription' to only save the details to the patient's profile. (**8**)

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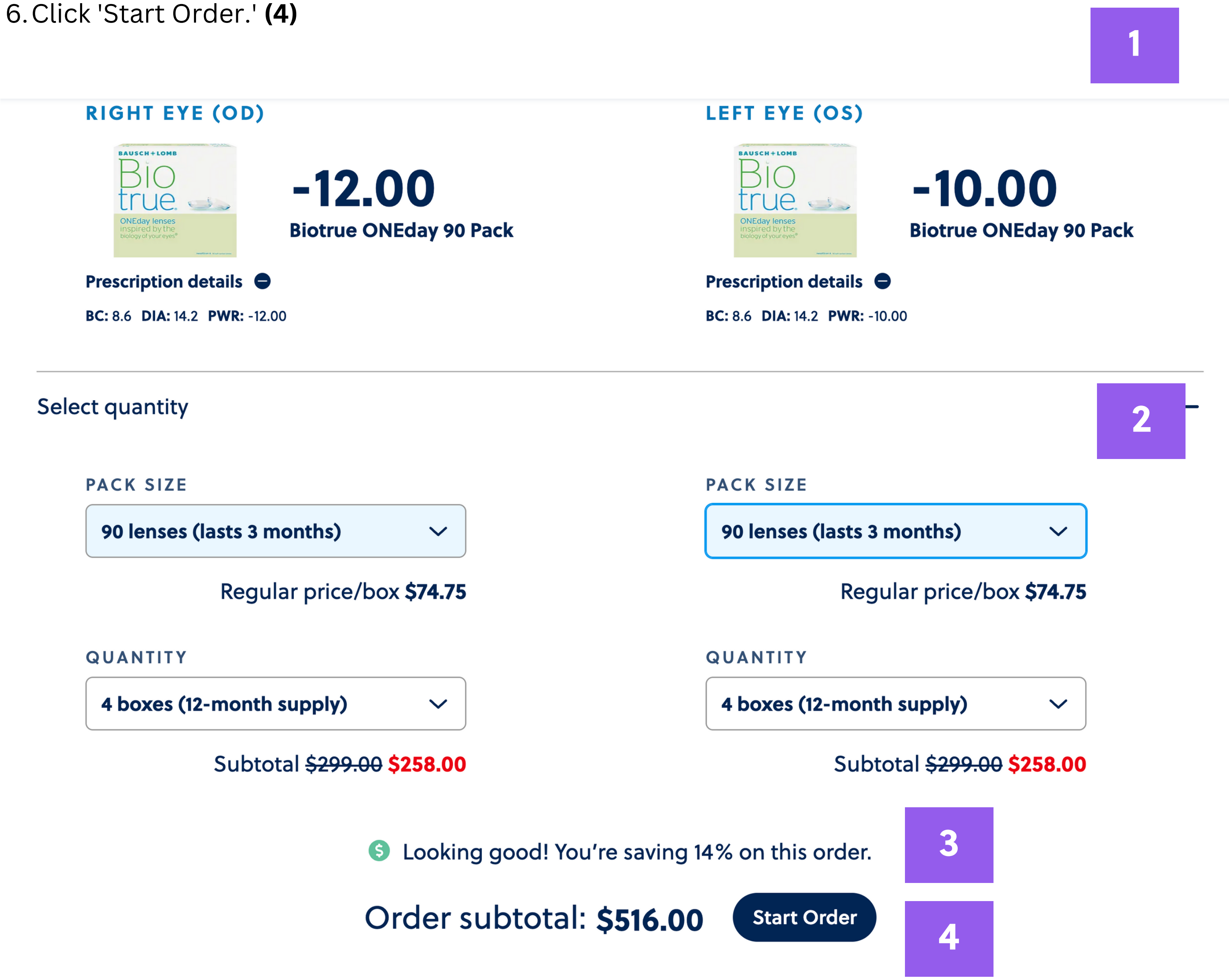
# Place an Order

1. Search for or create a new patient.
2. Choose a patient from the list.
3. Choose a prescription to fill. Confirm the prescription details for both eyes and make edits to the prescription, if necessary. **(1)**
4. Select the pack size and quantity for both eyes. **(2)**
5. Share with the customer the amount that they're saving (optional). **(3)**
6. Click 'Start Order.' **(4)**




7. Choose to fulfill the order through in-office inventory or ship to the patient. Confirm the shipping details.
8. Choose the desired shipping speed.
9. Apply (or skip) discounts to the order.
10. Collect the credit card details for online orders or select 'offline payment received' to use your office's own point-of-sale system.
11. Confirm all details and click 'Place Order.'

A confirmation will be sent to you and the patient with the order number. The patient will receive updates on the status of their order.

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# Get Started with the Performance Dashboard

The **Performance Dashboard** feature is a useful tool to help you get insights into your customers and contact lens sales. Click here to view our detailed walkthrough videos and learn more.

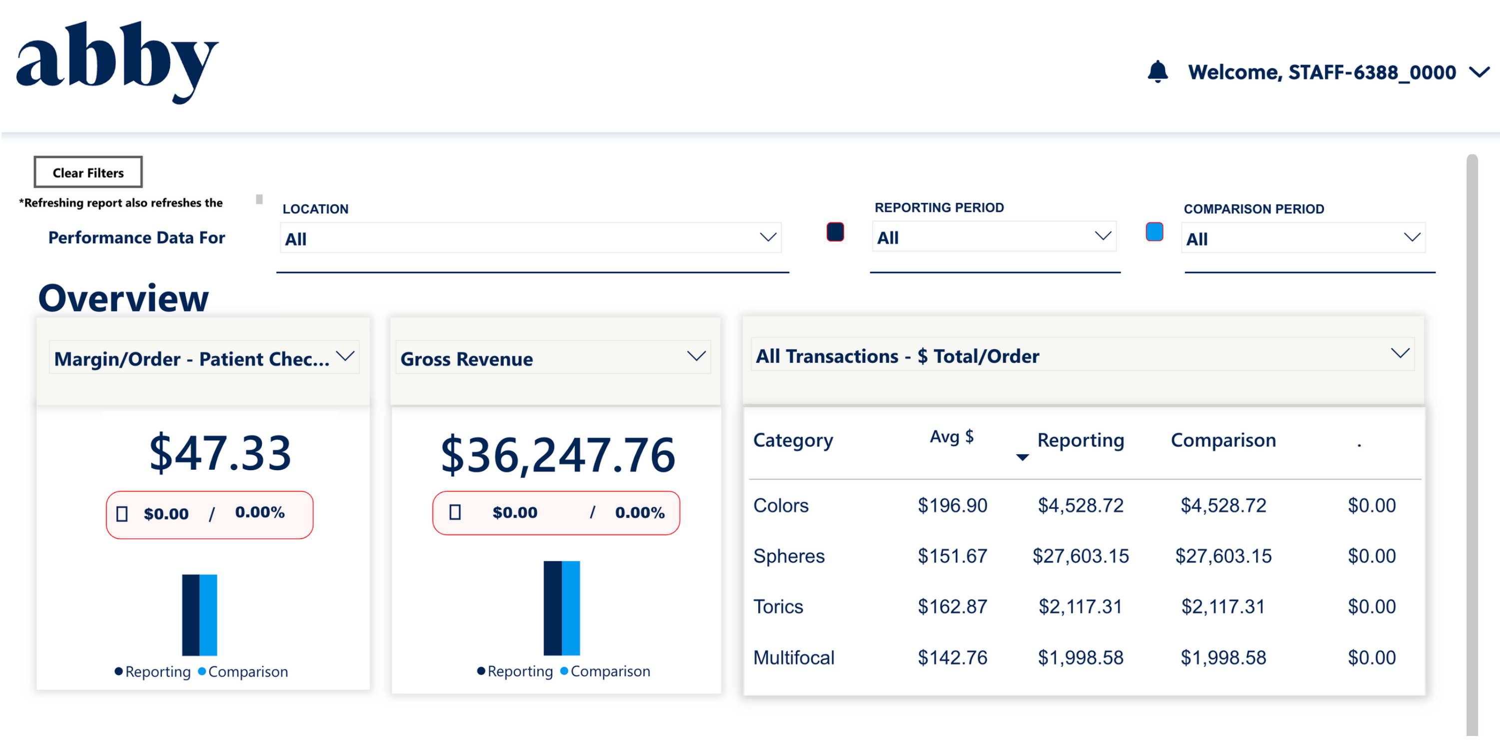
1. Click the down arrow next to your account's name, at the top right of the page.
2. Click 'Dashboard.'

## Filters and Overview

Use **filters** to refine the data shown on the dashboard. You can filter by Location (if you have more than one) or Reporting Period. Use the Comparison Period filter to choose a timeframe to compare to the Reporting Period.

The **overview section** shows an overview of the performance data for the chosen Location, Reporting Period, and Comparison Period.

Here, you can see information about your orders, revenue, and financials associated with all of the transactions.

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# Get Started with the Performance Dashboard

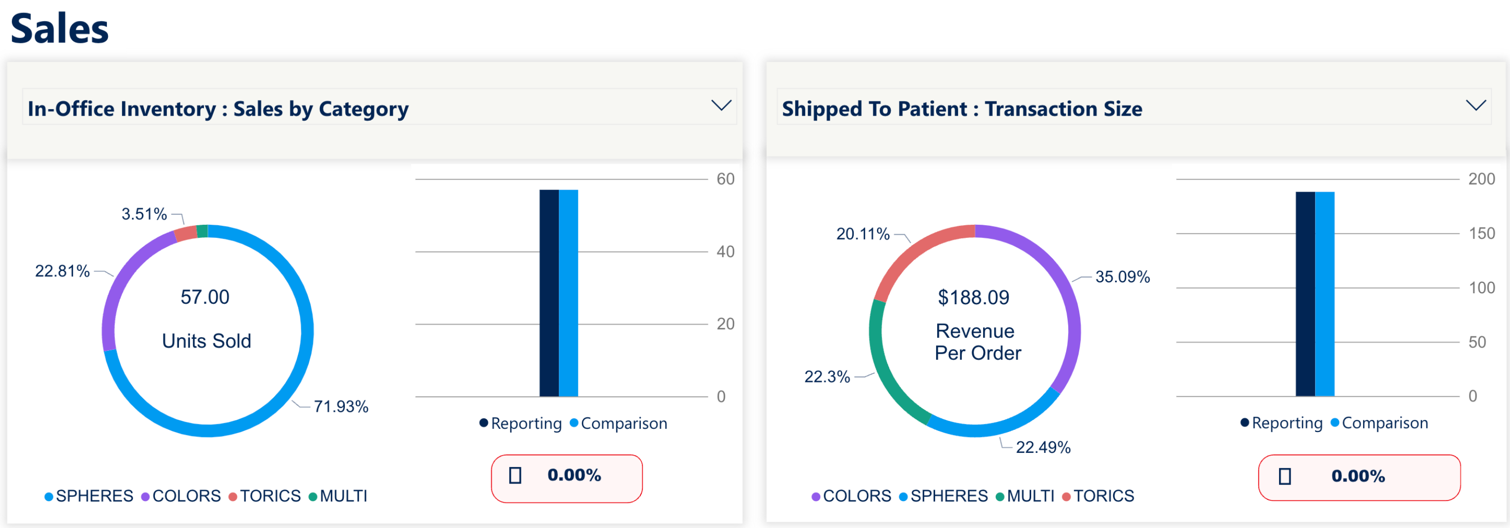
## Sales

The **Sales** section shows data  from both your in-office inventory and directly shipped to patient sales.

If you record all contact lens sales in Abby, even the ones using the in-office inventory, you will be able to see the data shown here, all in one place.

**In-Office Inventory**: use the down arrow to see the in-office inventory sales by category or transaction size

**Shipped to Patient**: use the down arrow to see information related to all sales shipped from Abby directly to the patient; refine by category or transaction size




Every down arrow is another place to make choices to refine data. Click each down arrow on the dashboards to see more options!

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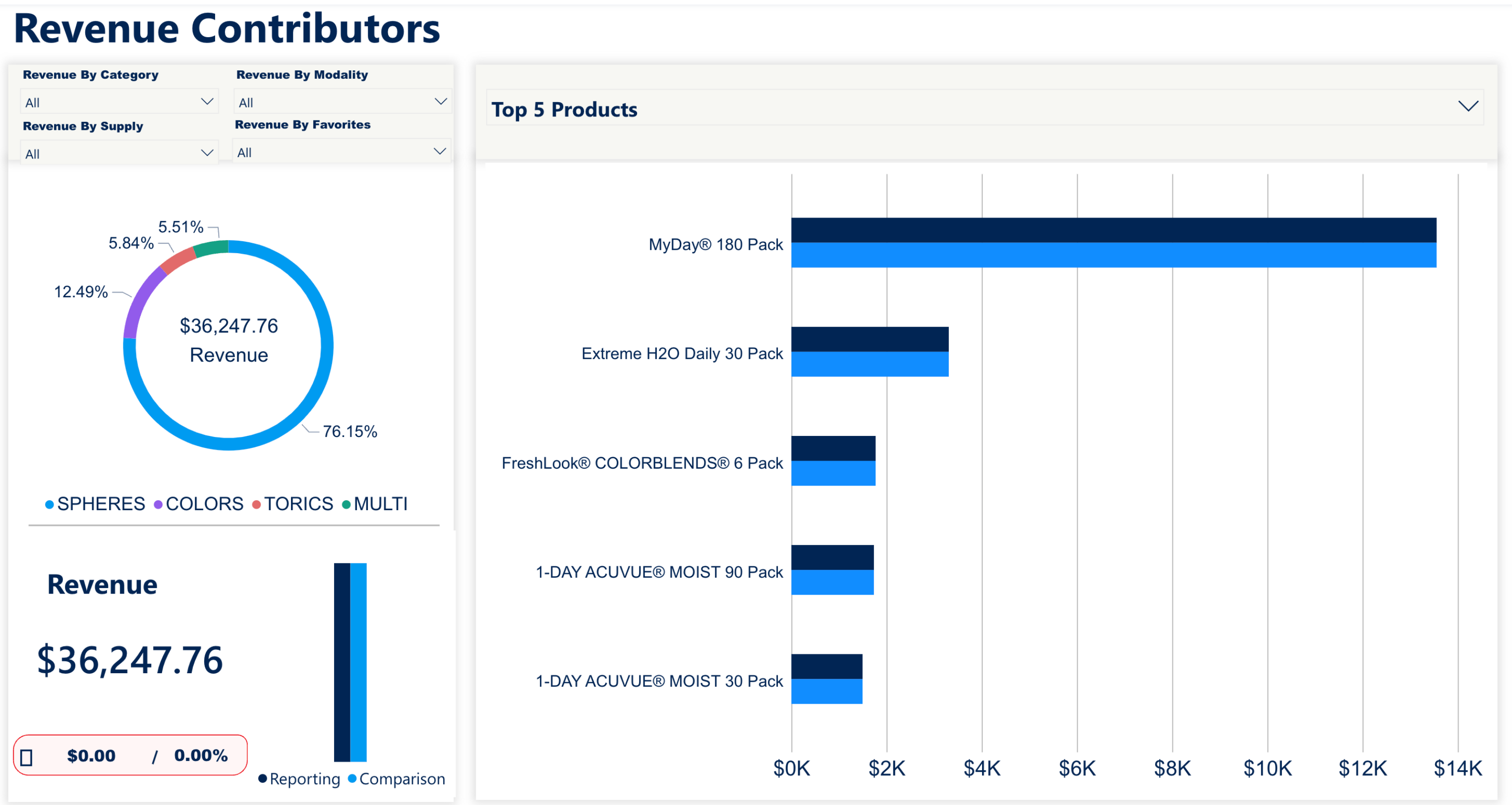
# Get Started with the Performance Dashboard

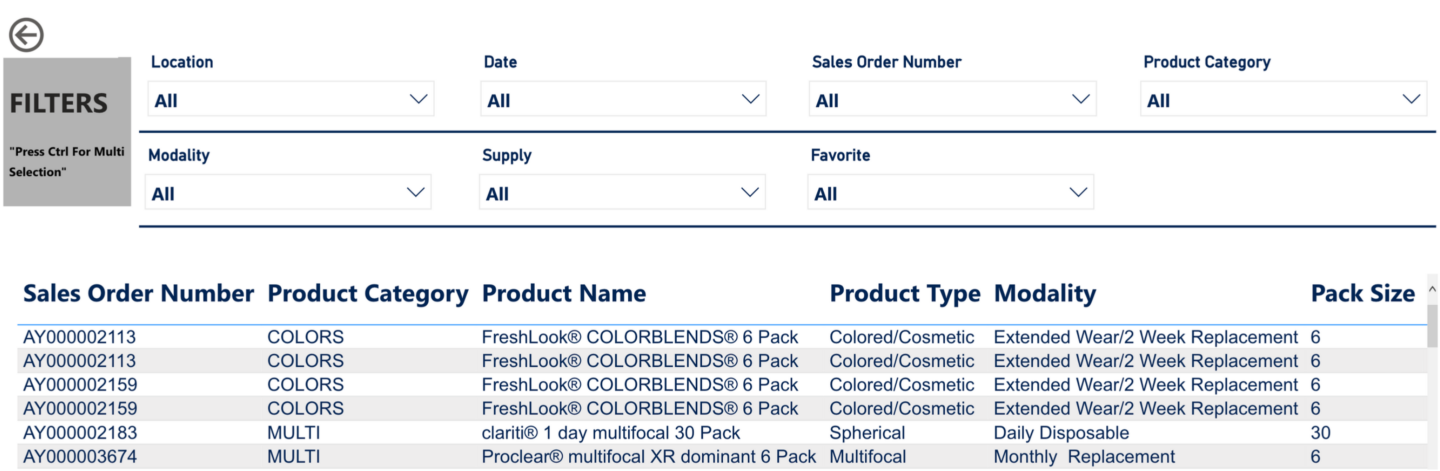
## Revenue Contributors

View which products are **selling the best** by category, supply, modality, and favorites




## Product Sales Details

Click the second tab at the bottom of the page to view the Product Sales Details. Use the filters at the top and the horizontal scroll bar at the bottom to **view details about each product** that your practice has sold.




| Sales Order Number | Product Category | Product Name | Product Type | Modality | Pack Size |
|---|---|---|---|---|---|
| AY000002113 | COLORS | FreshLook® COLORBLENDS® 6 Pack | Colored/Cosmetic | Extended Wear/2 Week Replacement | 6 |
| AY000002113 | COLORS | FreshLook® COLORBLENDS® 6 Pack | Colored/Cosmetic | Extended Wear/2 Week Replacement | 6 |
| AY000002159 | COLORS | FreshLook® COLORBLENDS® 6 Pack | Colored/Cosmetic | Extended Wear/2 Week Replacement | 6 |
| AY000002159 | COLORS | FreshLook® COLORBLENDS® 6 Pack | Colored/Cosmetic | Extended Wear/2 Week Replacement | 6 |
| AY000002183 | MULTI | clariti® 1 day multifocal 30 Pack | Spherical | Daily Disposable | 30 |
| AY000003674 | MULTI | Proclear® multifocal XR dominant 6 Pack | Multifocal | Monthly Replacement | 6 |

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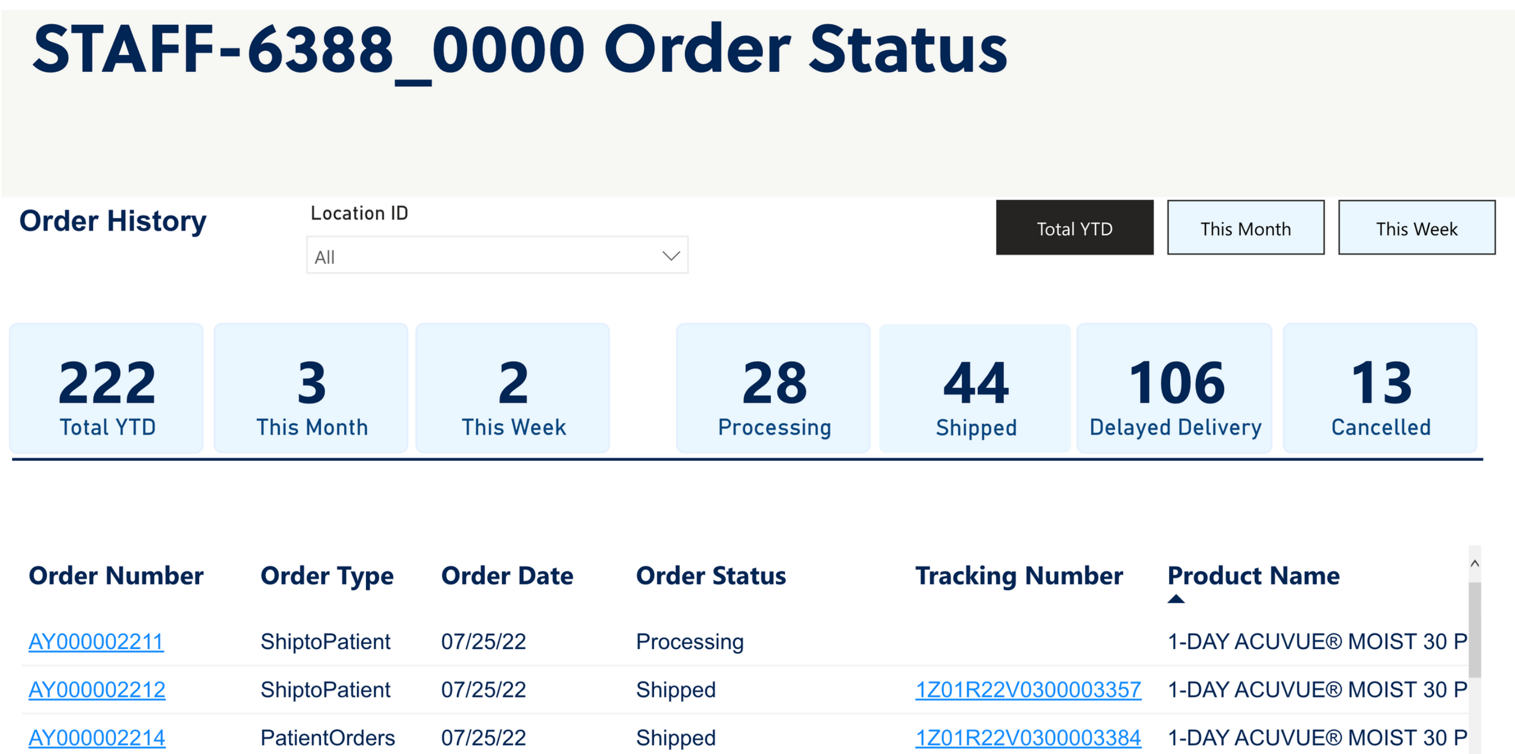
# Get Started with the Order Status Dashboard

The **Order Status Dashboard** is your one-stop to find all of the information about orders. You don't have to waste time looking up patient's orders anymore; all of the details are here, in a single place.

Click here to view our detailed walkthrough videos and learn more.

1. Click the down arrow next to your account's name, at the top right of the page.
2. Click Order Status.
3. Choose a location to view the order history details.




| Order Number | Order Type | Order Date | Order Status | Tracking Number | Product Name |
|---|---|---|---|---|---|
| AY000002211 | ShiptoPatient | 07/25/22 | Processing | | 1-DAY ACUVUE® MOIST 30 P |
| AY000002212 | ShiptoPatient | 07/25/22 | Shipped | 1Z01R22V0300003357 | 1-DAY ACUVUE® MOIST 30 P |
| AY000002214 | PatientOrders | 07/25/22 | Shipped | 1Z01R22V0300003384 | 1-DAY ACUVUE® MOIST 30 P |

## From this page, you can:

View the total **year-to-date, monthly, and weekly** sales

Click the hyper-linked order number to **view all of the order information**

Click the hyper-linked tracking number to **view tracking details from the carrier**

Use the horizontal scroll bar at the bottom to also **see the patient's name**

Click any **column header or blue area** to sort the data

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