



STEP BY STEP

Quick Start Guide

Start Placing Orders in the Wink of an Eye!

Remember, if you ever need a refresher on how to do something, [click here to access all of the short "how to" videos for everything Abby!](#)

abby

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 Customer Support by emailing help@helloabby.com.

All the best,

Abby



Choose a Topic

Getting Started

- Log-in to your account
- Setup 2-factor authentication
- Set Pricing Using the Quick Catalog Feature
- Set Pricing Using the Custom Feature
- Manage Patients
- Add a New Prescription
- Add a Patient Credit Card
- Place an Order
- Patient "Opt-in" to Text Messages
- Check the Status of an Order
- Get Practice Data with the Performance Dashboard
- Get Started with the Order Status Dashboard



When you see this light icon, you will also see a helpful hint.

More Resources

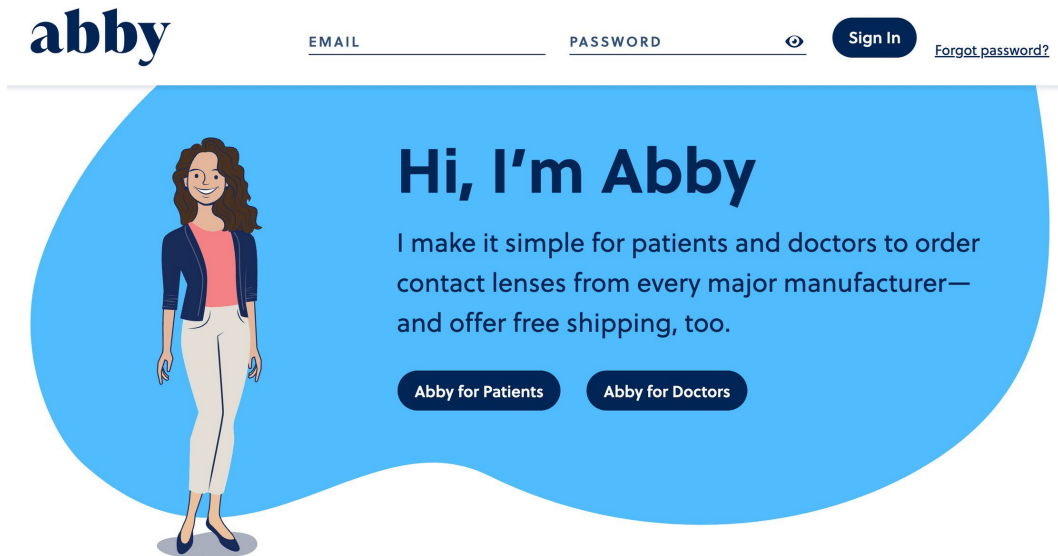
[Step by Step Walkthrough Videos](#)

[Frequently Asked Questions \(FAQs\)](#)



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.

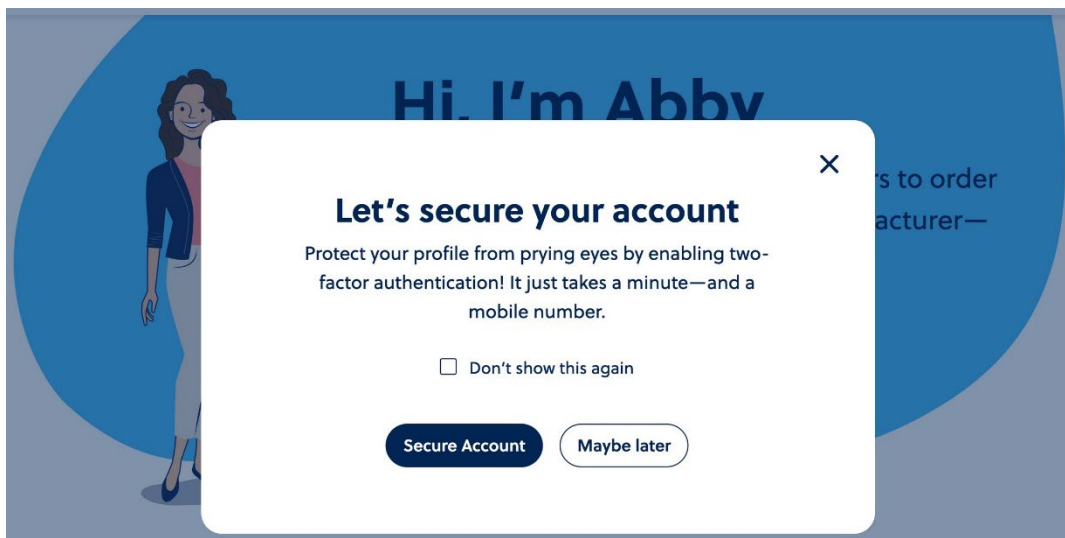


Set Up 2-Factor Authentication

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 receive text messages with an access code when your account is accessed, to provide an additional layer of security.

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



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'.

Edit your retail pricing strategy



You can set the retail price for all products in your catalog below. Choose the suggested retail pricing' or a tiered percentage or dollar increase over cost.

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!

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.

Percentage

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

SINGLE
0 _____ %

SEMI-ANNUAL
0 _____ %

ANNUAL
0 _____ %

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

Dollar

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

SINGLE
\$ 0 _____

SEMI-ANNUAL
\$ 0 _____

ANNUAL
\$ 0 _____

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

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

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)

★ Pricing strategy has been updated.

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
3 _____ %

SEMI-ANNUAL
3 _____ %

ANNUAL
3 _____ %

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.




Save Changes


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 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.

 Filters (1) Acuvue   Favorites



Products Showing 26 Sort 



 Updated 2:00 PM  



**1-DAY ACUVUE®
DEFINE® 30 Pack**

	SINGLE	SEMI-ANNUAL	ANNUAL
Unit Price	\$53.99	\$50.99	\$47.75
Markup	91.45%	80.82%	69.33%
Cost	\$28.20	\$28.20	\$28.20

 To instantly update prices, click "Apply Now." To create a batch of updates, click the  icon and "Review List" to edit, delete, or apply all updates.

 Reset

Collapse -

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

HI, CATHY

Ready to place an order?

Great! Just select a patient to get started.

📍 Add a patient's date of birth to make your search results more accurate.

NAME OR EMAIL
Search patient's name or email

MM/DD/YYYY
Search patient's date of birth

Need to add a new patient? [Create Profile](#)

Steps 2-3

Create patient profile

Patient details

Who do we have here? Let's get introduced!

FIRST NAME
William

LAST NAME
Troy

EMAIL ADDRESS
sunshine_smile713@yahoo.com

DATE OF BIRTH
12/31/971

I have explained to this patient that they will be automatically enrolled in email communications from Abby.

[Create Profile](#) [Cancel](#)

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

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.

HI, CATHY

Ready to place an order?

Great! Just select a patient to get started.

📍 Add a patient's date of birth to make your search results more accurate.

NAME OR EMAIL
Tony Stark

MM/DD/YYYY
05/29/1970

Need to add a new patient? [Create Profile](#)

1 result found within your practice

Step 2

Tony Stark

✉️ tstark@starkindustries.com

🏠 3426 Yale Street, Houston, TX, 77018

📞 832-627-8351

📄 #0000

📅 05/29/1970

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

2. Choose a patient from the list.

Edit a Patient's Account

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

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.

Patient details

[Delete Account](#)

Account information

✉️ tstark@starkindustries.com

🔒 Patient to create password

Personal information [Edit](#)

👤 Tony Stark

🏠 3426 Yale Street, Houston, TX, 77018

📞 [832-627-8351](tel:832-627-8351)

📅 05/29/1970

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).

Same prescription for both eyes (OU) **3**

RIGHT EYE (OD)

No prescription right eye **4**

BRAND
All (187) **1**

PRODUCT
biotrue **2**

LEFT EYE (OS)

No prescription left eye

BRAND
All (187)

PRODUCT
Search brand or keyword, i.e. toric

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)**

RIGHT EYE (OD)

No prescription right eye

 Biotrue ONEday 30 Pack

BASE CURVE ?

8.6 **5**

DIAMETER ?

14.2

POWER

-12.00 **6**

This prescription will expire on 10/03/2023 **Edit** **7**

 Remember to confirm patient information before placing an order.

Create & Start Order

Create Prescription

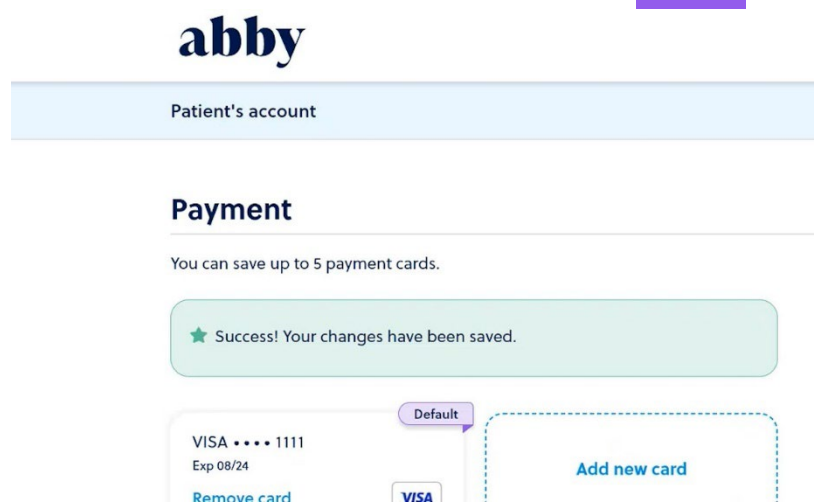
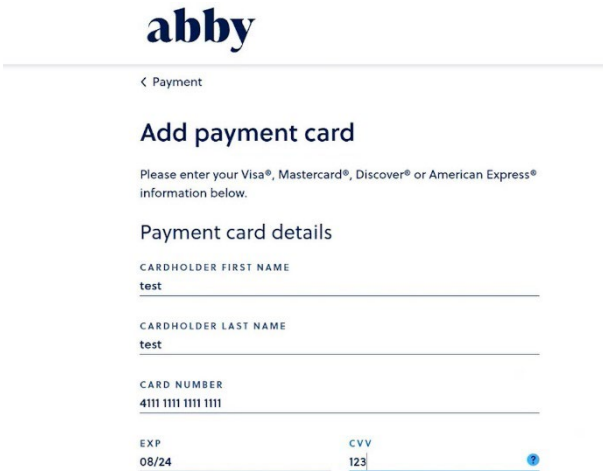
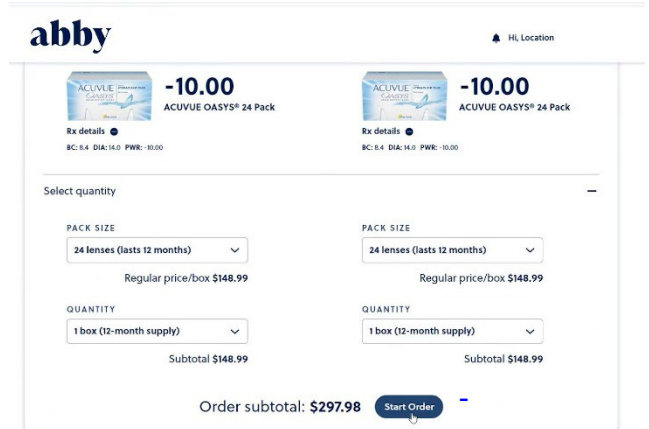
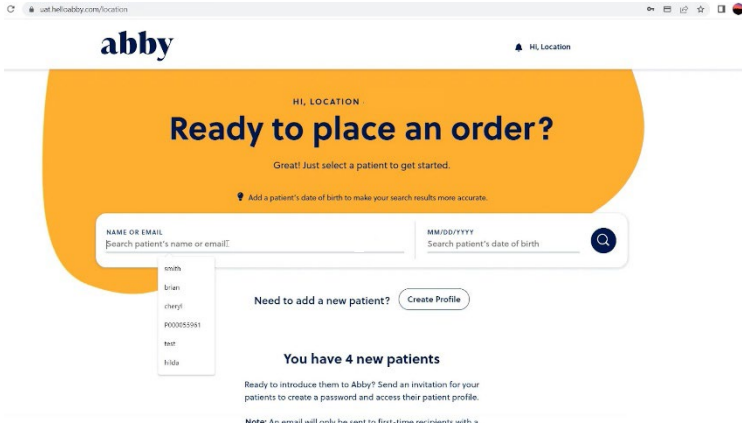
Cancel

8



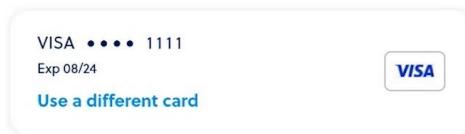
Add a Credit Card to A Patient Profile

1. First, search and select an existing patient's profile. (1)
Then, start a patient order. (2)
2. If there is already a credit card on the patient profile, choose that preferred card. (3)
3. If not, click "Use a different" card, and a new window will open up for you to enter the patient's new credit card information. (4)
4. Place the Order using the patient's preferred credit card. (5)
5. See success screen



Payment

Choose from your saved cards or use a new one.



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)**

1

RIGHT EYE (OD)



-12.00

Biotrue ONEday 90 Pack

Prescription details

BC: 8.6 DIA: 14.2 PWR: -12.00

LEFT EYE (OS)



-10.00

Biotrue ONEday 90 Pack

Prescription details

BC: 8.6 DIA: 14.2 PWR: -10.00

Select quantity

2

PACK SIZE

90 lenses (lasts 3 months)

Regular price/box **\$74.75**

QUANTITY

4 boxes (12-month supply)

Subtotal ~~\$299.00~~ **\$258.00**

PACK SIZE

90 lenses (lasts 3 months)

Regular price/box **\$74.75**

QUANTITY

4 boxes (12-month supply)

Subtotal ~~\$299.00~~ **\$258.00**

Looking good! You're saving 14% on this order.

3

Order subtotal: **\$516.00**

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.'

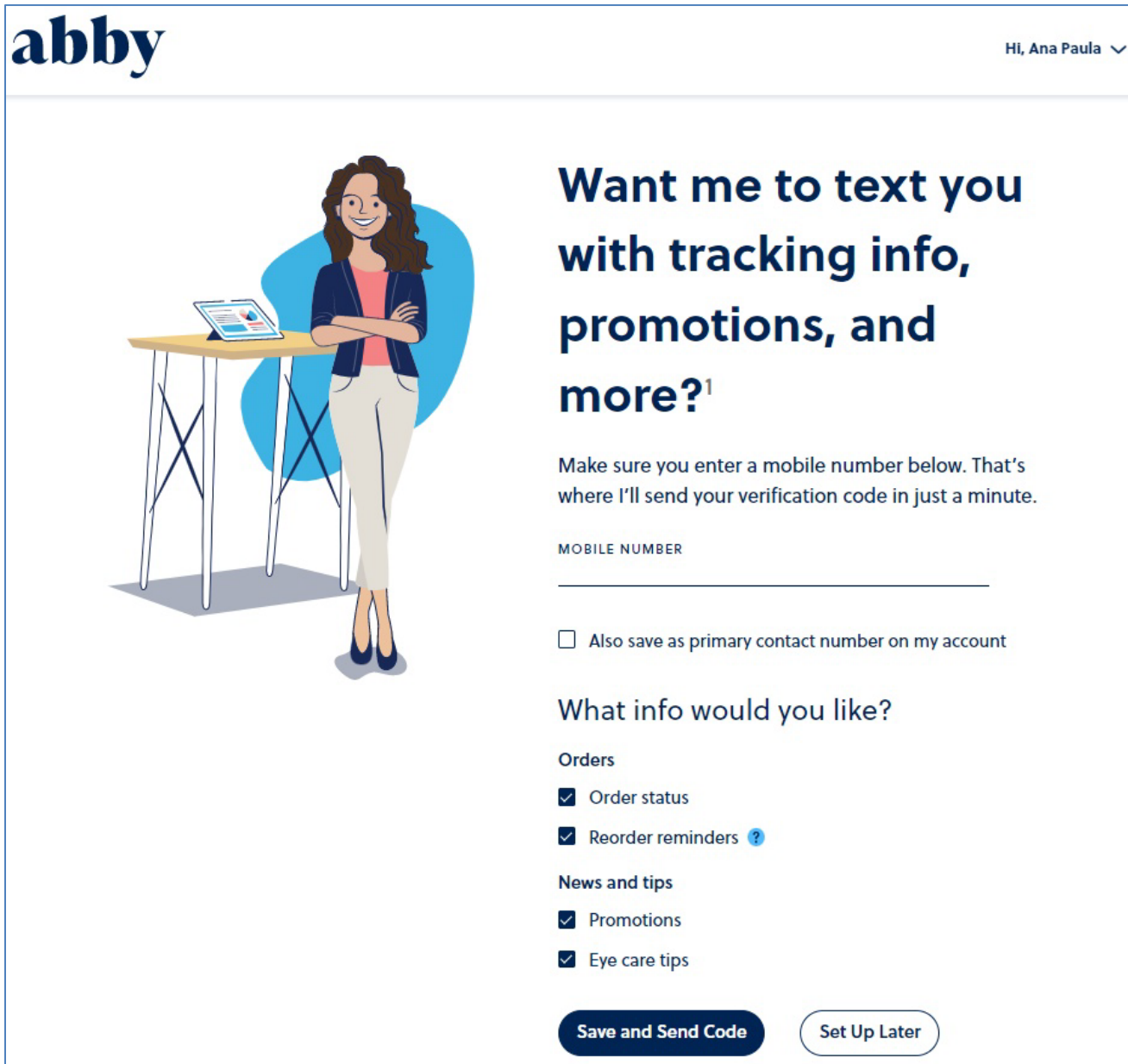


A confirmation will be sent to you and the patient with the order number. The patient will receive updates on the status of their order.

Patient Text Opt-In to Reorder

Abby now has the ability to send timely text reminders to all Abby Patients. All Patients must first "Opt In" to receive text messages from Abby.

1. For patients who are registering for the first time, after creating their password they will be presented with a NEW notification screen where they can turn on Text Notifications.



abby Hi, Ana Paula ▾

Want me to text you with tracking info, promotions, and more?¹

Make sure you enter a mobile number below. That's where I'll send your verification code in just a minute.

MOBILE NUMBER

Also save as primary contact number on my account

What info would you like?

Orders

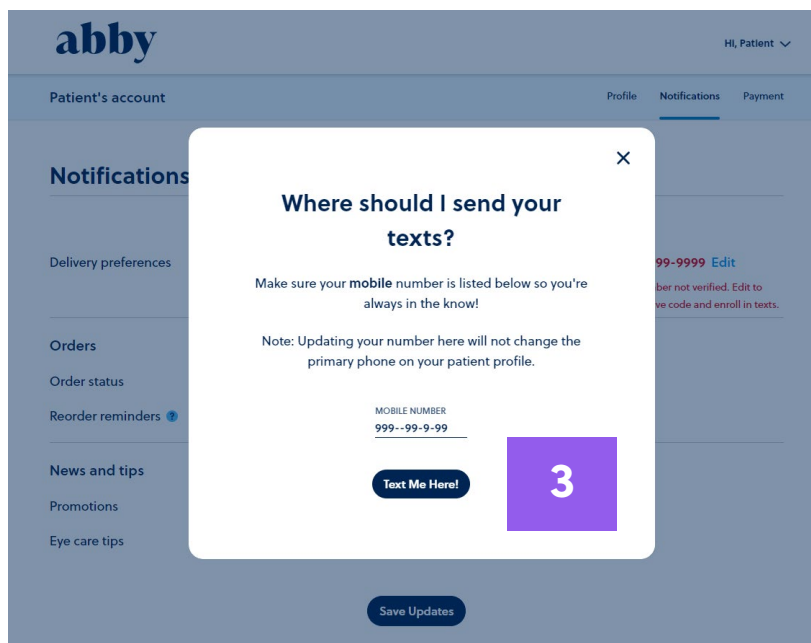
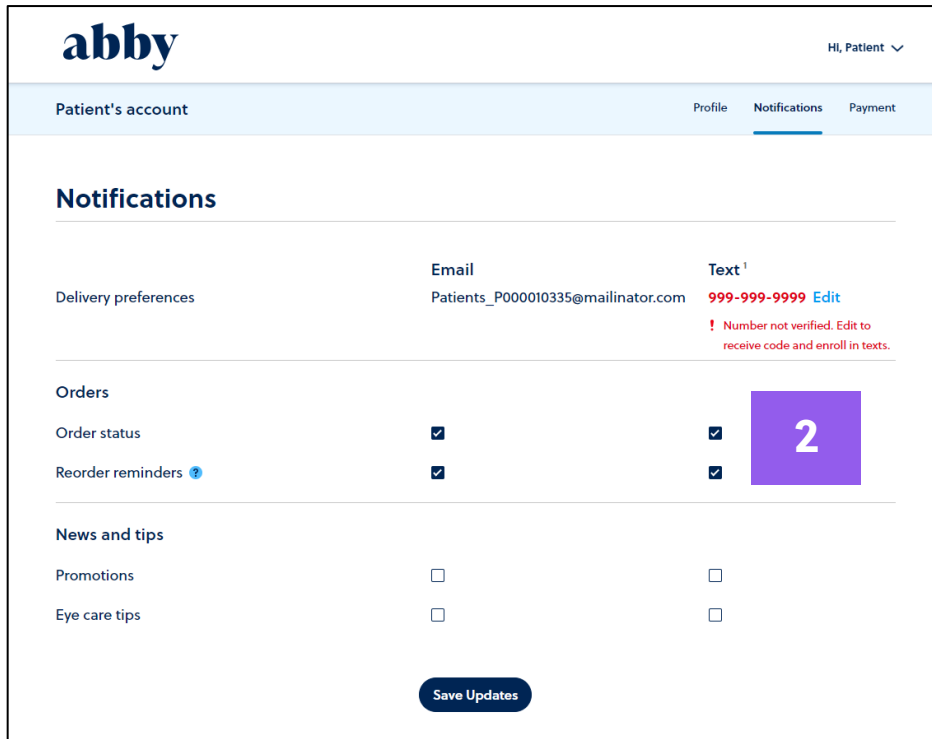
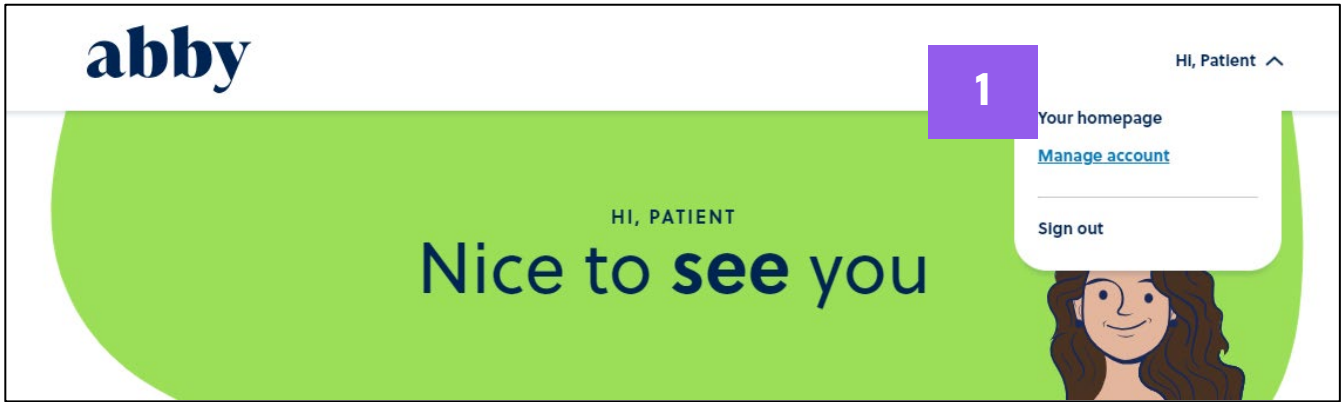
- Order status
- Reorder reminders ?

News and tips

- Promotions
- Eye care tips

Save and Send Code Set Up Later

2. For existing patients, they must first go into "Manage Account". **(1)**
3. When they are in their "Profile" they will go to the "Notifications Tab" and add their mobile # and check the boxes to "Opt in" to get Order Status and Reorder Reminders sent via text **(2)**
4. They then will click the "Edit" button, which will prompt them to enter their mobile #. **(3)**



Check the Delivery Status of an Order

Abby now provides both the practice and the patient with a greater level of detail on the status of an order.

1. Now, both customers and their patients, will be notified the minute their order is delivered.
2. This new feature will help increase the number of patients who open the emails and reorder before they run out.

🔔 HI, ▾

← Patient Profile

#AY000110787

Delivered

Tracking:

[92748926729001553085135421](#)



↓ [Download PDF](#)

[ORDER #AY000110787](#)

Order date: 03/21/2023

Tracking Number:

[92748926729001553085135421](#)

Patient name

👤 Debbie Jones

Order summary

Debbie's Rx

RIGHT EYE (OD)



Biofinity toric 6 Pack

Rx details ⌵

BC: 8.7

DIA: 14.5

PWR: -1.50

CYL: -1.75

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.

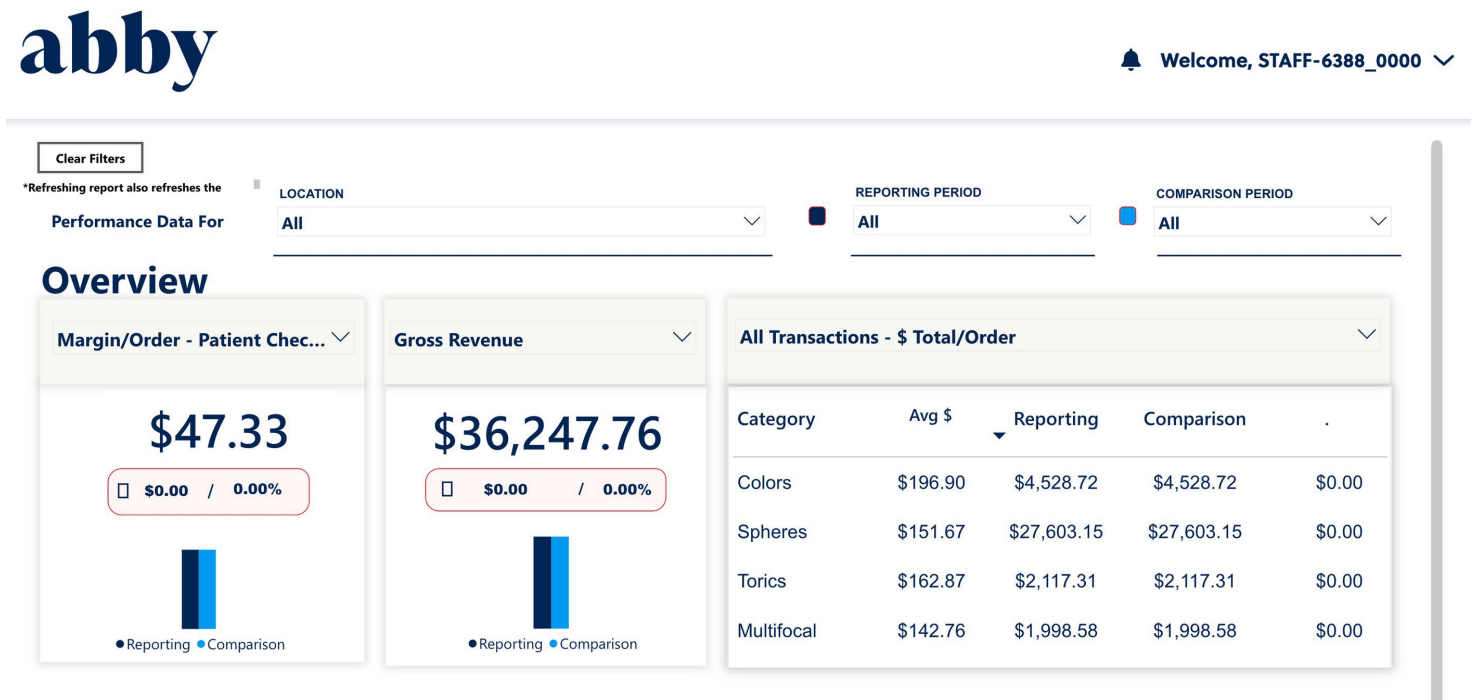
1. Click the down arrow next to your account's name, at the top right of the page.
2. Click 'Dashboard.'

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.



Get Started with the Performance Dashboard

Sales

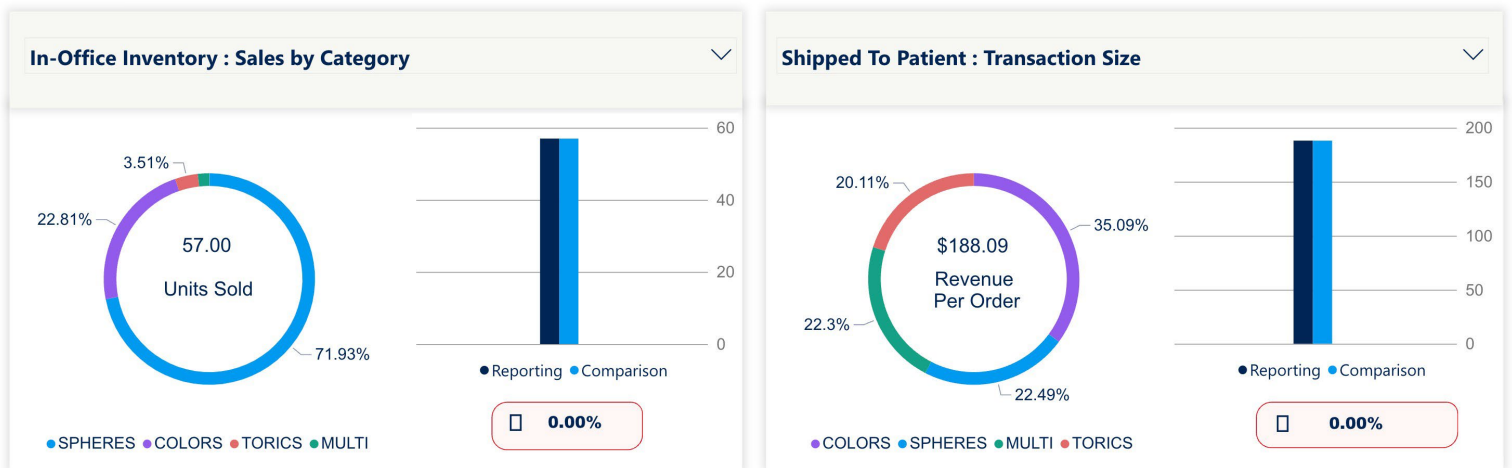
The **Sales** section shows data from both your in-office inventory and directly shipped to patient sales.

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

Sales

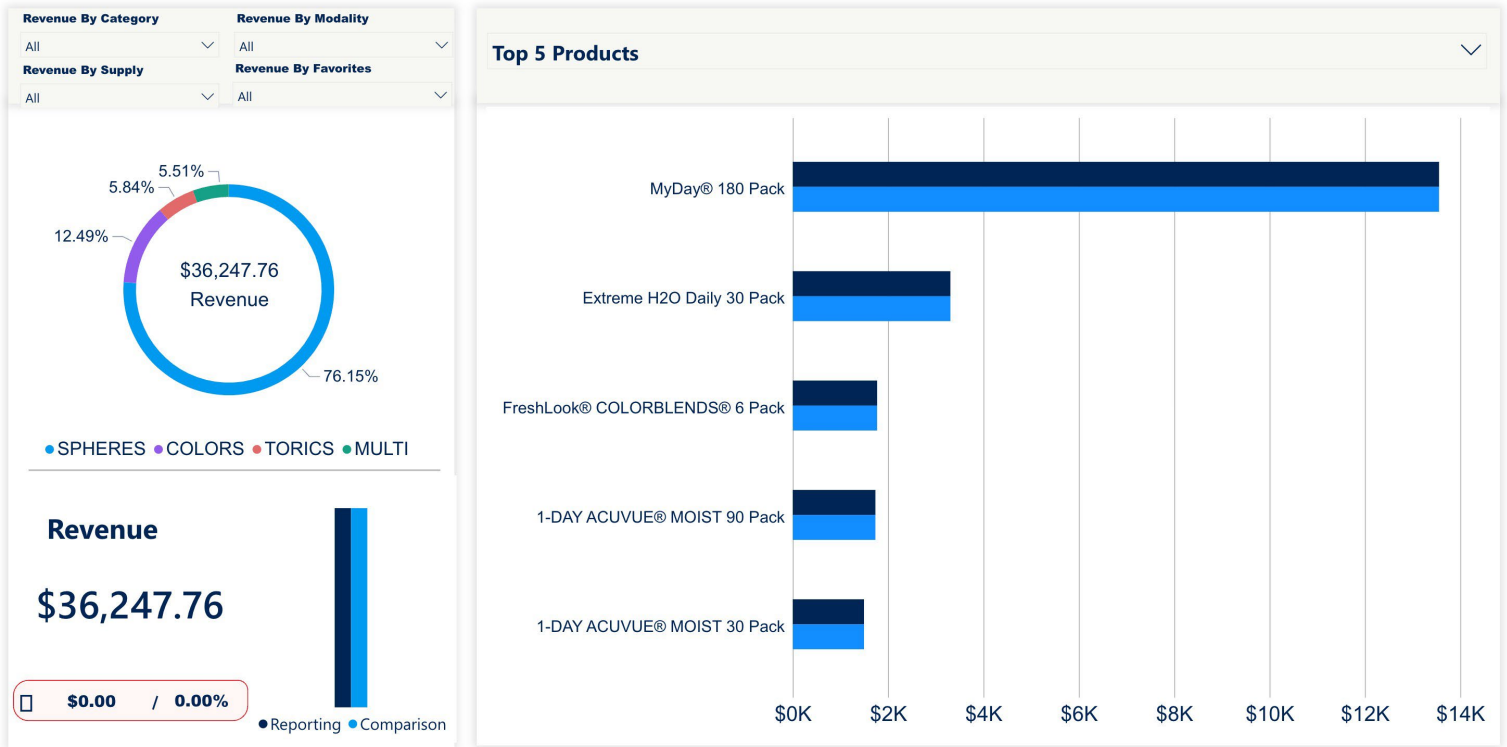


Get Started with the Performance Dashboard

Revenue Contributors

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

Revenue Contributors



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.

←

FILTERS

Press Ctrl For Multi Selection

Location	Date	Sales Order Number	Product Category
All	All	All	All
Modality	Supply	Favorite	
All	All	All	

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	clarity® 1 day multifocal 30 Pack	Spherical	Daily Disposable	30
AY000003674	MULTI	Proclear® multifocal XR dominant 6 Pack	Multifocal	Monthly Replacement	6

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.

STAFF-6388_0000 Order Status

Order History

Location ID

All

Total YTD

This Month

This Week

222

Total YTD

3

This Month

2

This Week

28

Processing

44

Shipped

106

Delayed Delivery

13

Cancelled

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