Abby User Guide

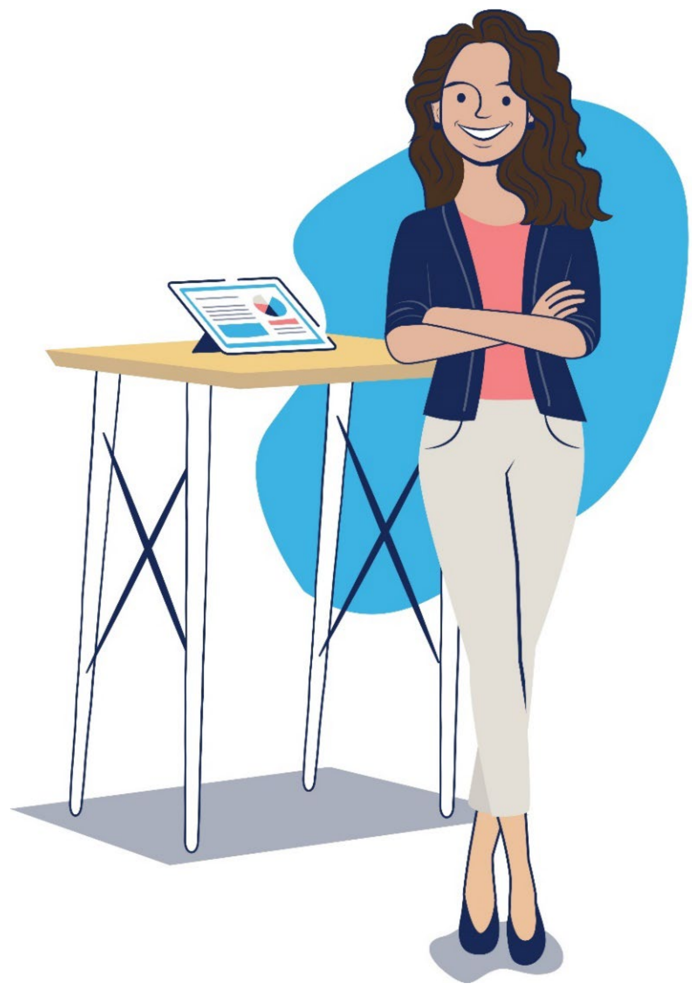
A Comprehensive
Instructional Guide for
Using the Abby
Online Ordering Platform

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. You'll also learn how to use Abby's Order Status and Performance dashboards!

Need more help? Feel free to reach out to Abby customer support by emailing **help@helloabby.com.**



Abby

Topics / Table of Contents

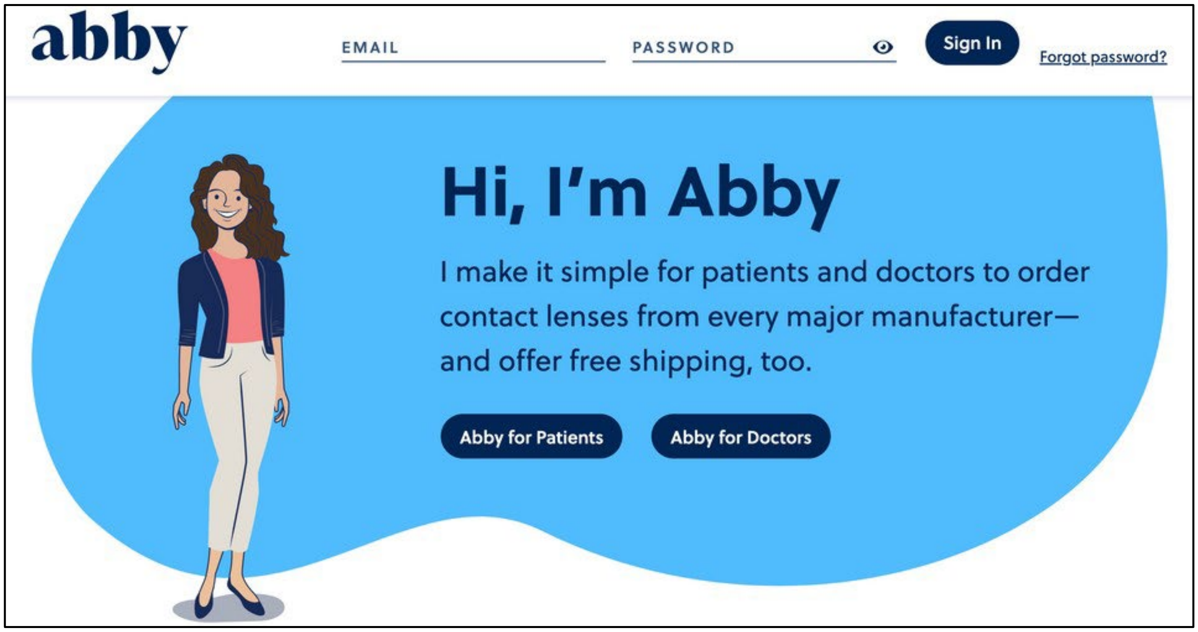
MORE RESOURCES:

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.
3. Choose 'Forgot password?' if you need to reset your password.

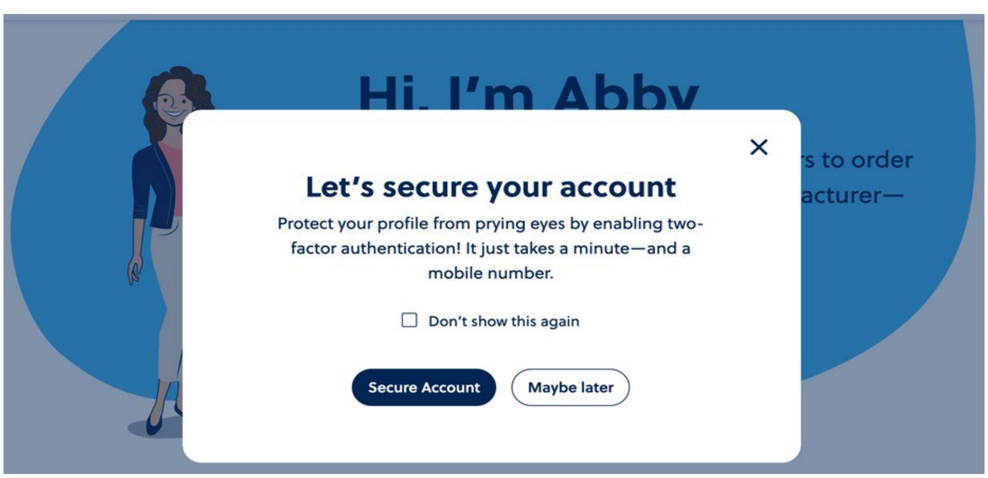


Set Up 2-Factor Authentication

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.

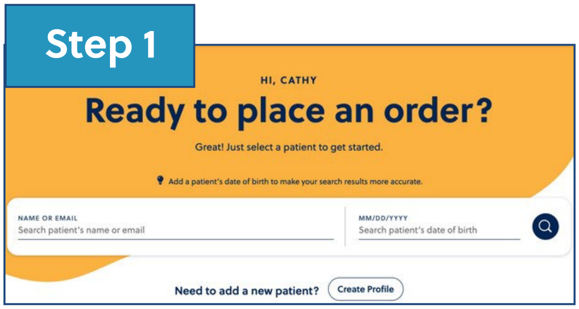
1. **To secure your account**: Click 'Secure Account' to provide a mobile number for the 2-factor authentication. You will be receiving text messages with an access code when your account is accessed, to provide an additional layer of security.

2. **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.



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.

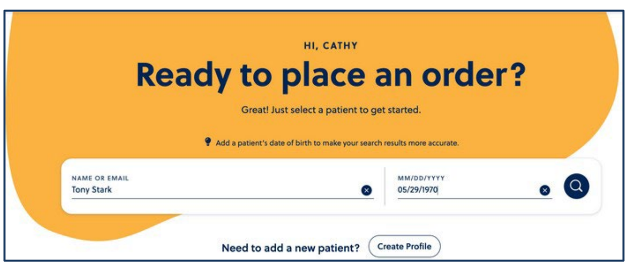


ke sure to let your patient ow that they will receive communications from Abby!

Search for a Patient

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

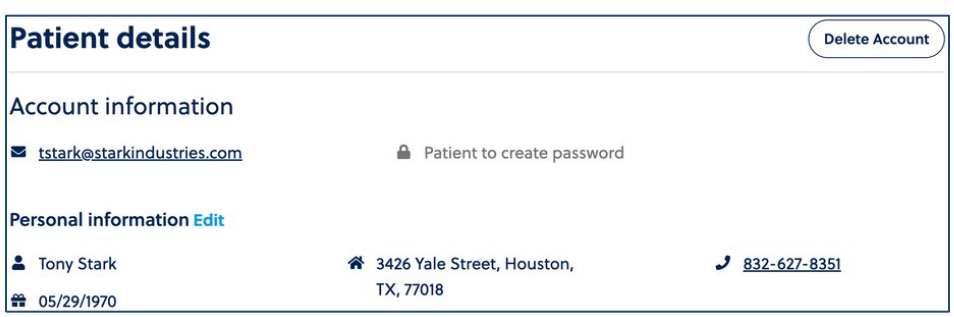
1. Input the patient's full name, email address, and/or date of birth. Click the search glass.
2. Choose a patient from the list



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.

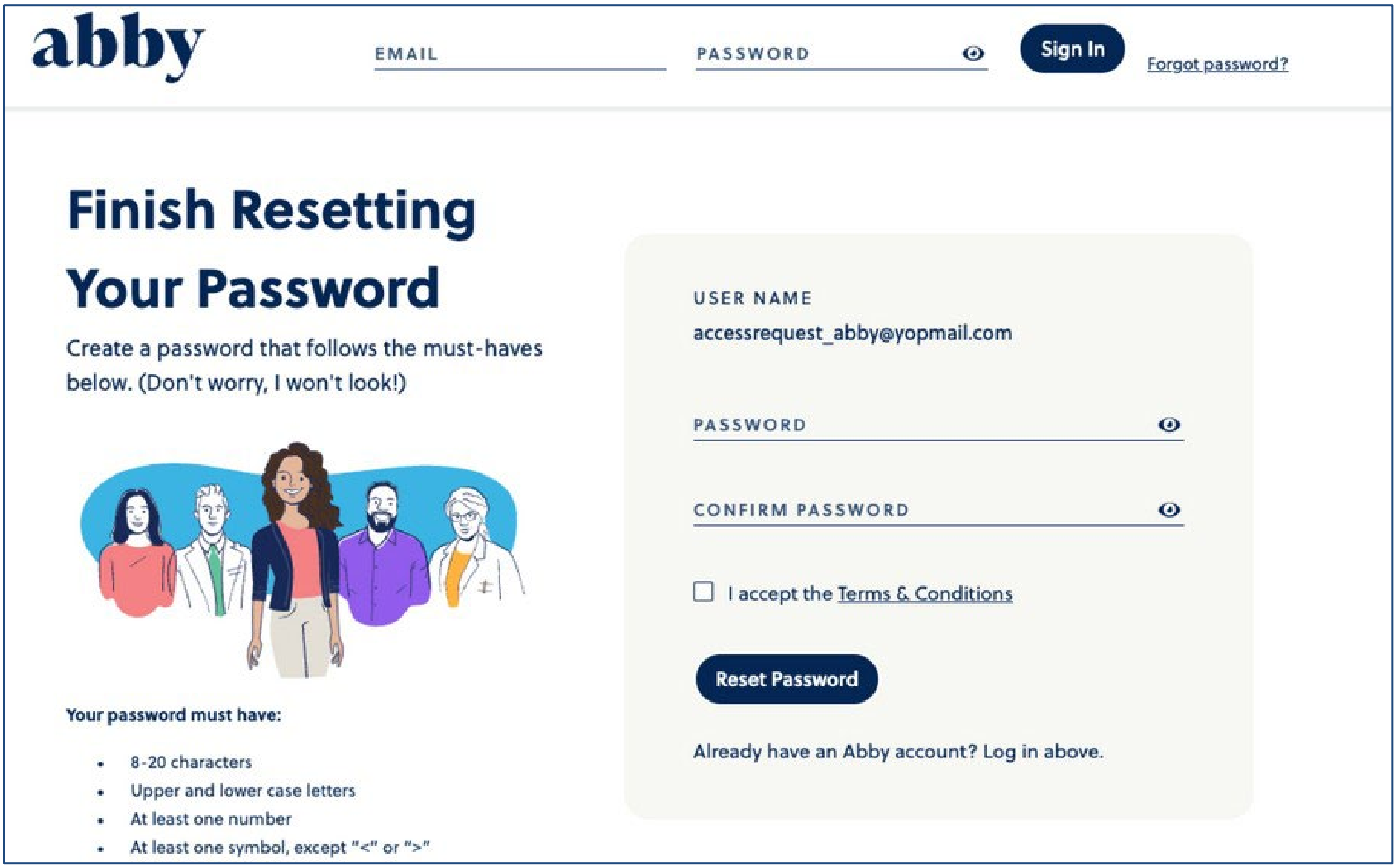


What Your Patient Will See

Your patients will receive a welcome email after you create an account for them.

By following the instructions in the email, your patients will be able to create their own password, view their orders, track deliveries, and manage notifications.

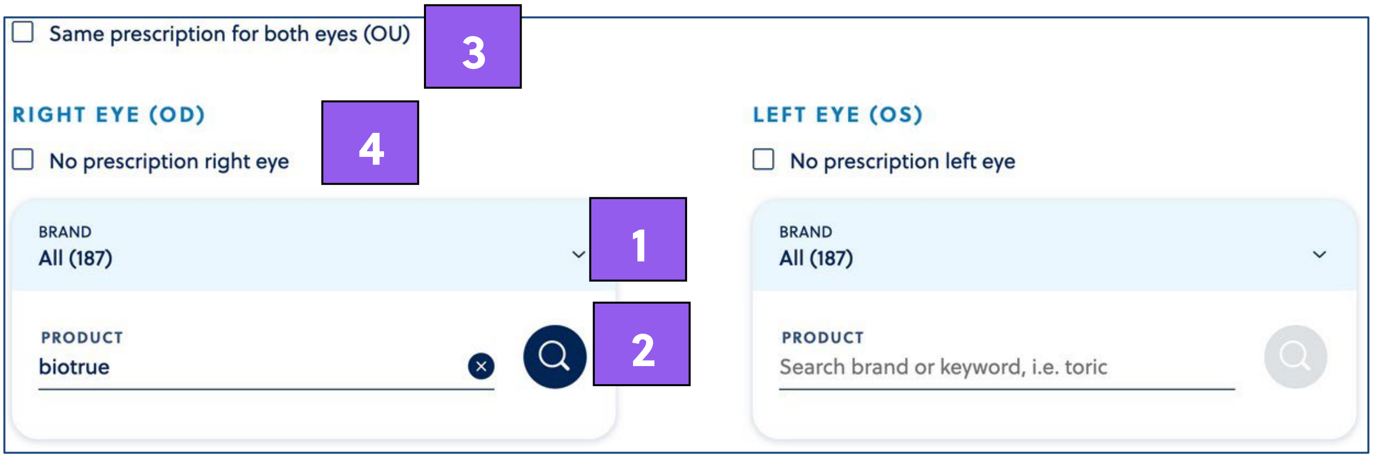
Here's an image that shows what your patients will see. Please ask your patients to review and accept the Terms and Conditions before resetting their password.



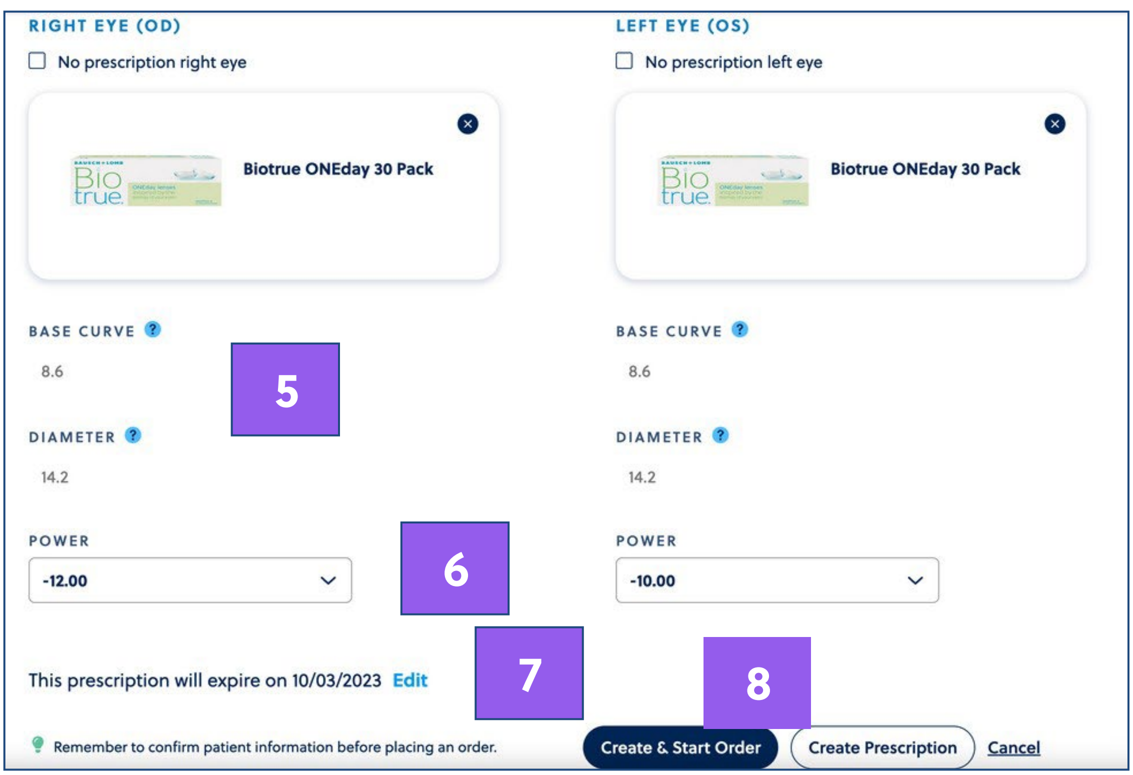
Manage Prescriptions

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**).

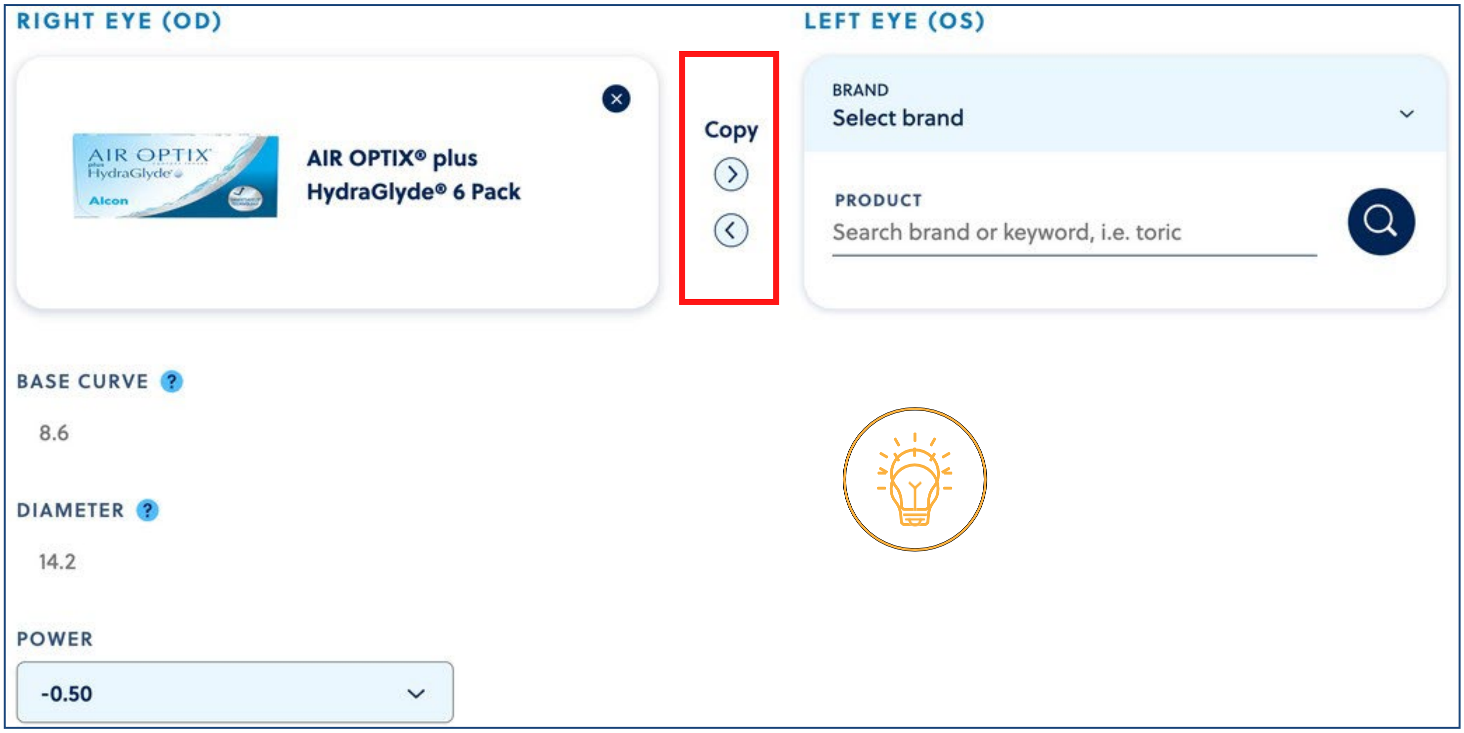


5. Review the Base Curve and Diameter, which are set according to the product's features. (**5**)
6. Select the power. (**6**)
7. Click 'Edit' next to the prescription expiration date to update. (**7**)
8. Click 'Create & Start Order' to immediately place an order. Or, choose 'Create Prescription' to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



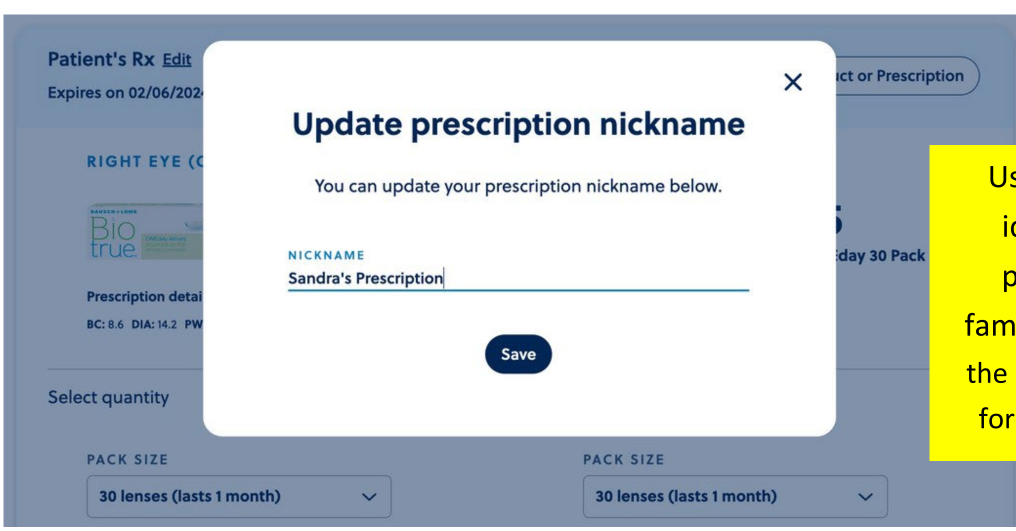
Copy Products from One Eye to Another

1. Use the patient search feature to find and choose a patient.
2. Click 'Add a new prescription' or 'Update Product or Rx"
3. Choose the details for either eye.
4. The copy option will appear between the right eye / left eye options.
5. Click an arrow to copy an Rx from either eye to the other.



Create a Prescription Nickname

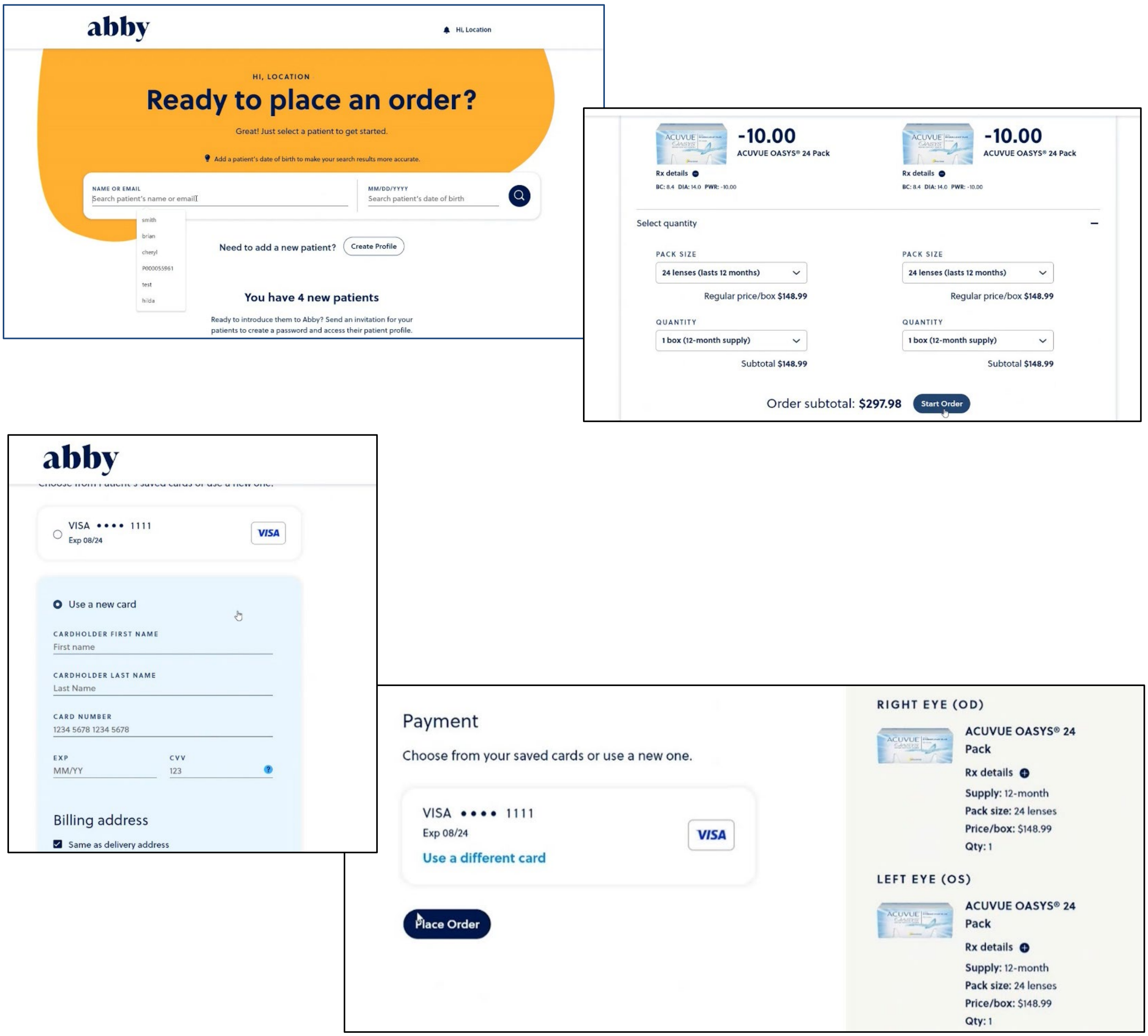
1. View the default prescription name from the patient's profile.
2. Click 'Edit' next to the default name.
3. Type in a new nickname for the prescription. Click 'Save.'



Use this feature to identify multiple prescriptions for family members using the same email address for their Abby profile.

Add a Credit Card to a Patient Profile

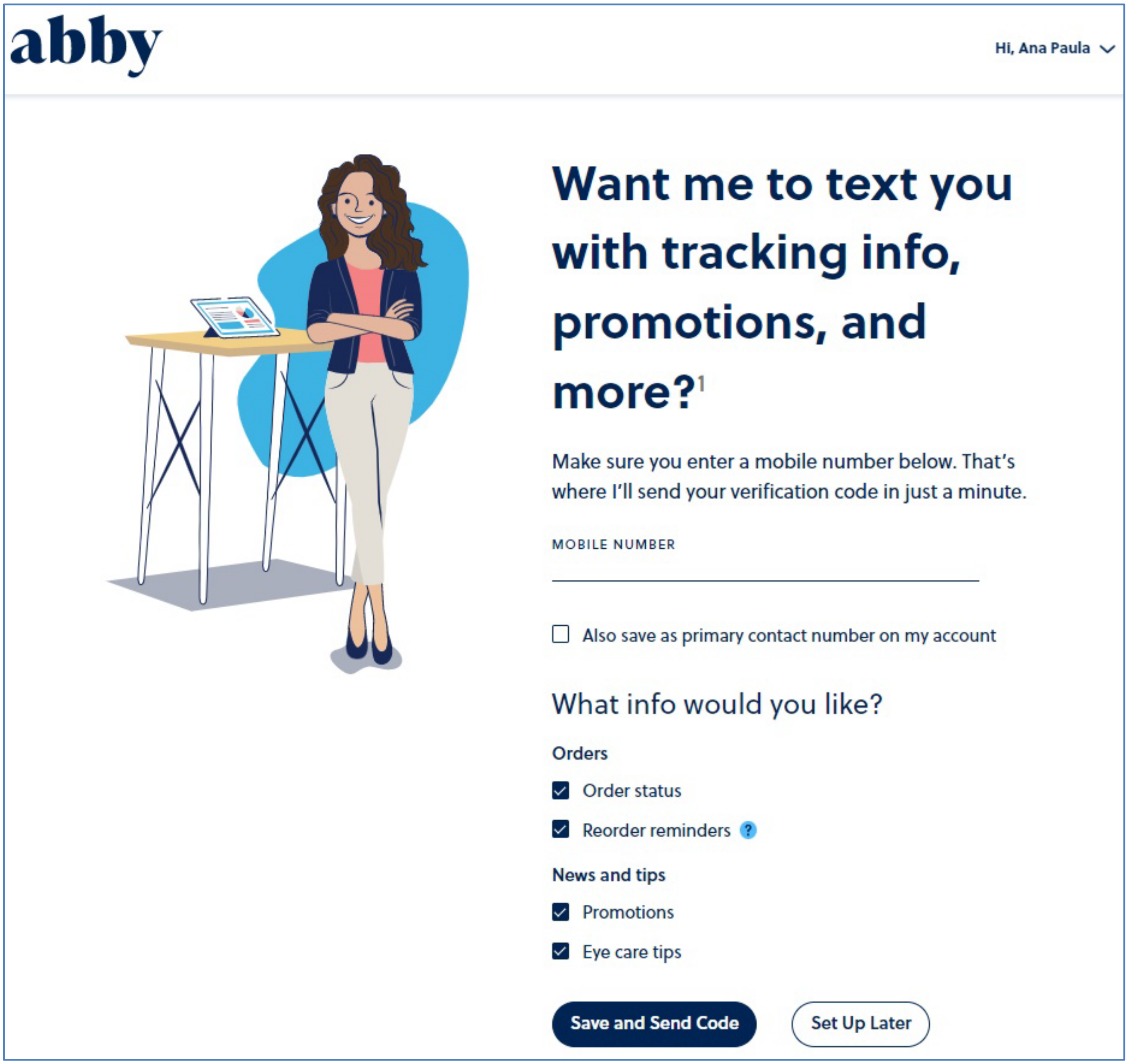
1. First, search and select an existing patient's profile.
2. Then, start a patient order.
2. If there is already a credit card on the patient profile, choose that preferred card.
3. If not, click "Use a different" card, and a new window will open up for you to enter the patient's new credit card information.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



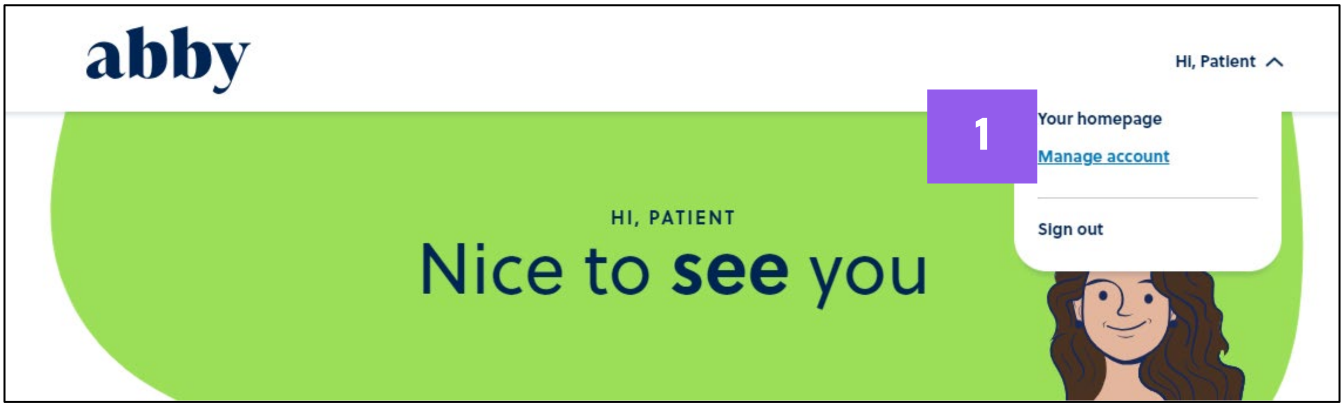
Patient Opt-In to Text Messages

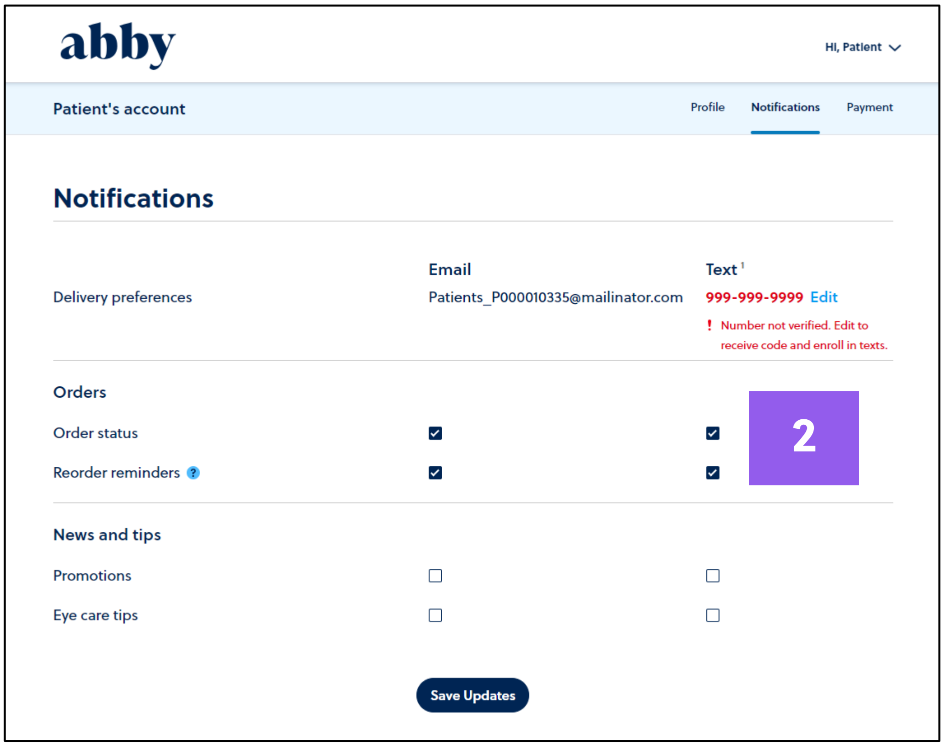
Abby now has the ability to send timely text reminders to all Abby Patients. All Patients must first "Opt In" to receive text messages from Abby.

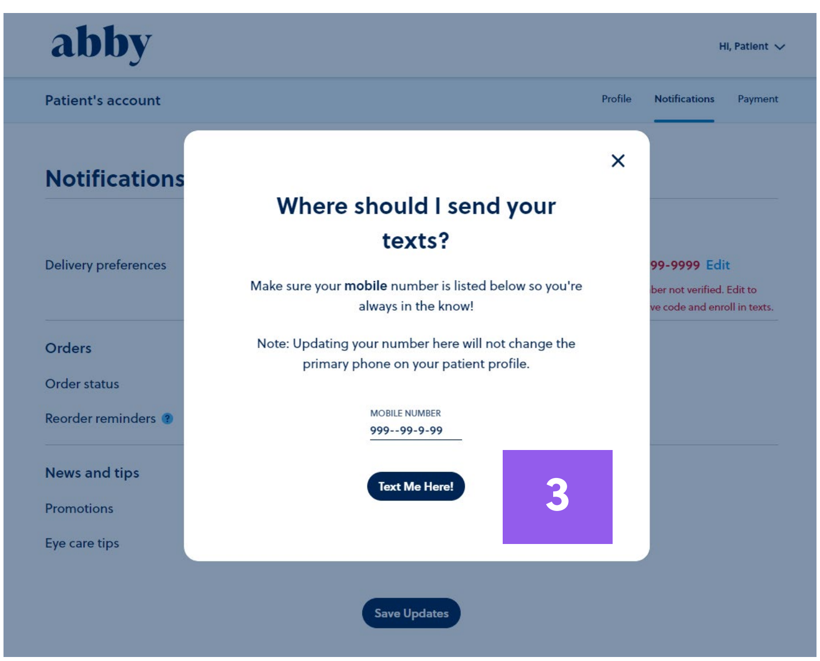
1. For patients who are registering for the first time, after creating their password they will be presented with a NEW notification screen where they can turn on Text Notifications.



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)**

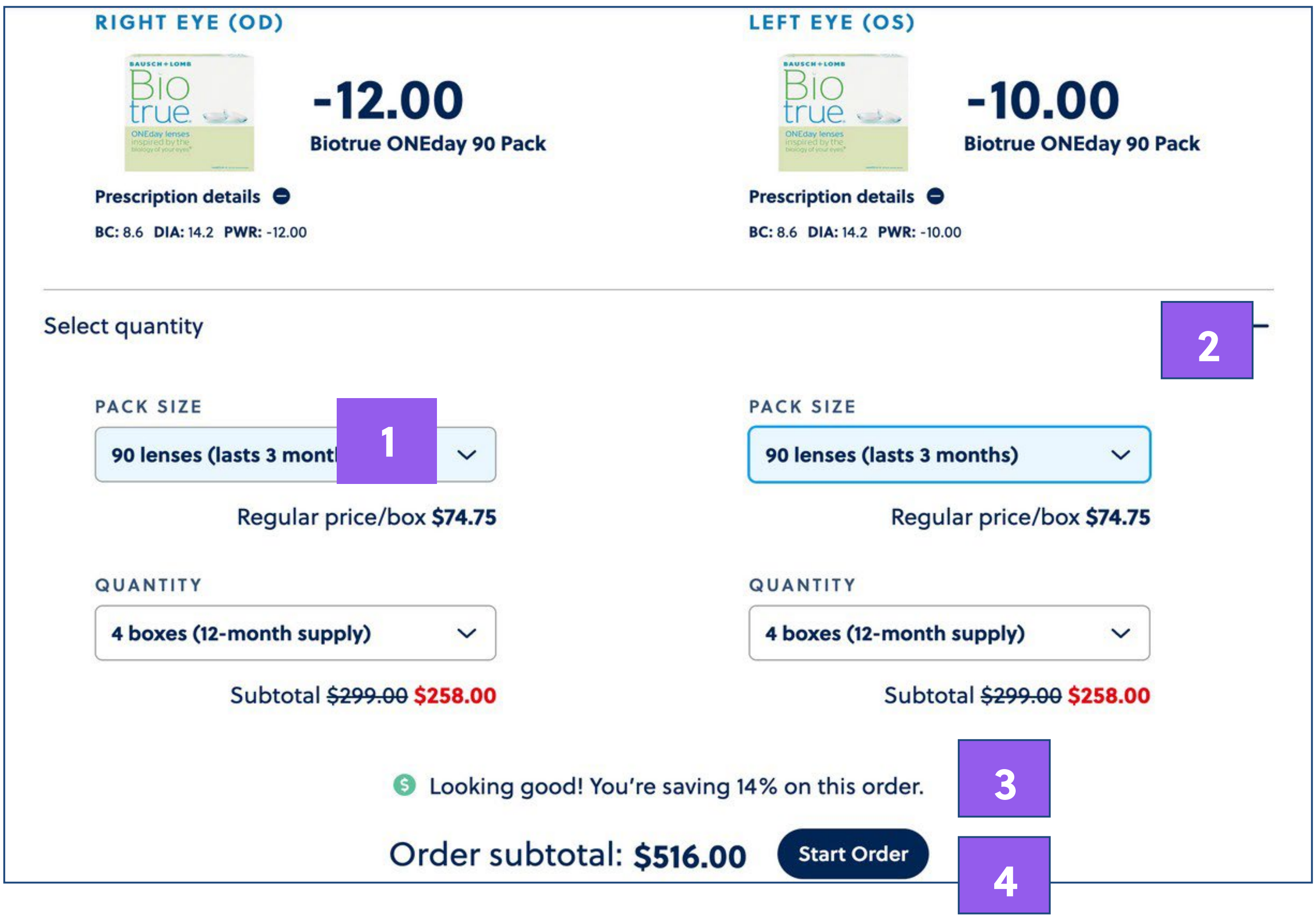

abby
Hi, Patient
1
Your homepage
Manage account
Sign out
HI, PATIENT
Nice to see you


abby
Hi, Patient
Patient's account
Profile
Notifications
Payment
Notifications
Email
Text 1
Delivery preferences
Patients_P000010335@mailinator.com
999-999-9999 Edit
! Number not verified. Edit to receive code and enroll in texts.
Orders
Order status
Reorder reminders
2
News and tips
Promotions
Eye care tips
Save Updates


abby
Hi, Patient
Patient's account
Profile
Notifications
Payment
Notifications
Delivery preferences
Orders
Order status
Reorder reminders
News and tips
Promotions
Eye care tips
Where should I send your texts?
Make sure your mobile number is listed below so you're always in the know!
Note: Updating your number here will not change the primary phone on your patient profile.
MOBILE NUMBER
999--99-9-99
Text Me Here!
3
Save Updates

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)**

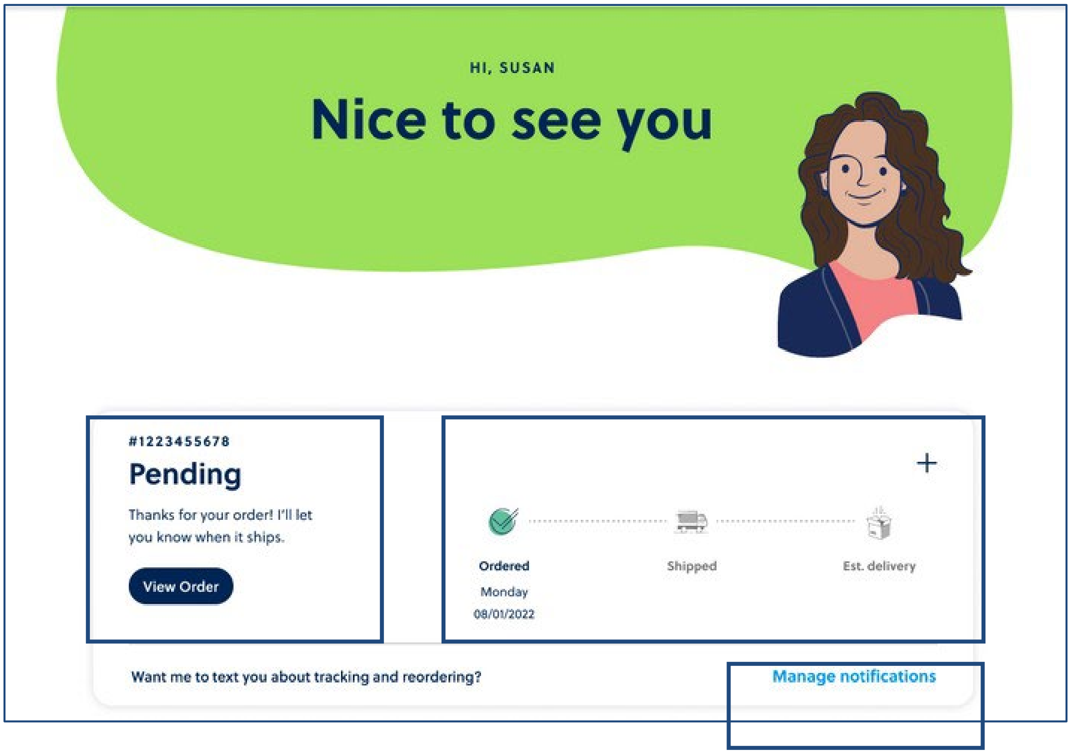


7. Choose to fulfill the order through in-office inventory or ship to the patient. Confirm the shipping details.
8. Choose the desired shipping speed.
9. Apply (or skip) discounts to the order.
10. Collect the credit card details for online orders or select 'offline payment received' to use your office's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

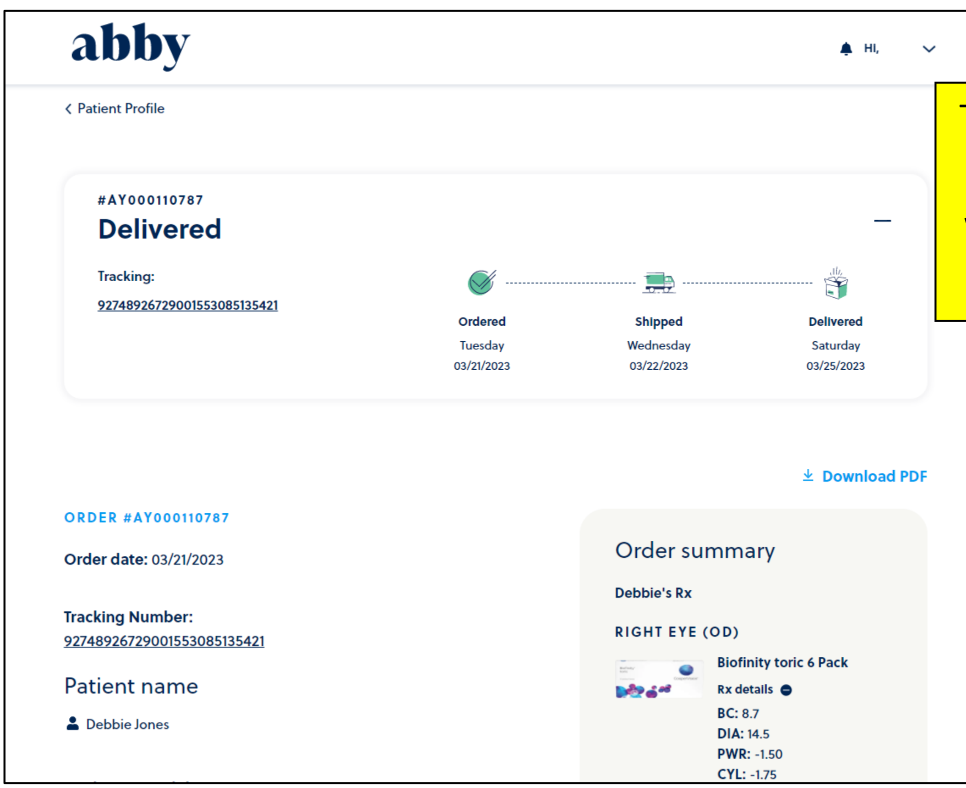
A confirmation will be sent to you and the patient with the order number. The patient will receive updates on the status of their order.

Shipping and Delivery Status Notifications

Patients can track their Abby orders on their dashboard and sign up for shipping alerts. The patient dashboard shows each of the following steps in the shipping process:



Patients can click 'Manage notifications' to receive notifications about their order. This page will update as their order is processed.

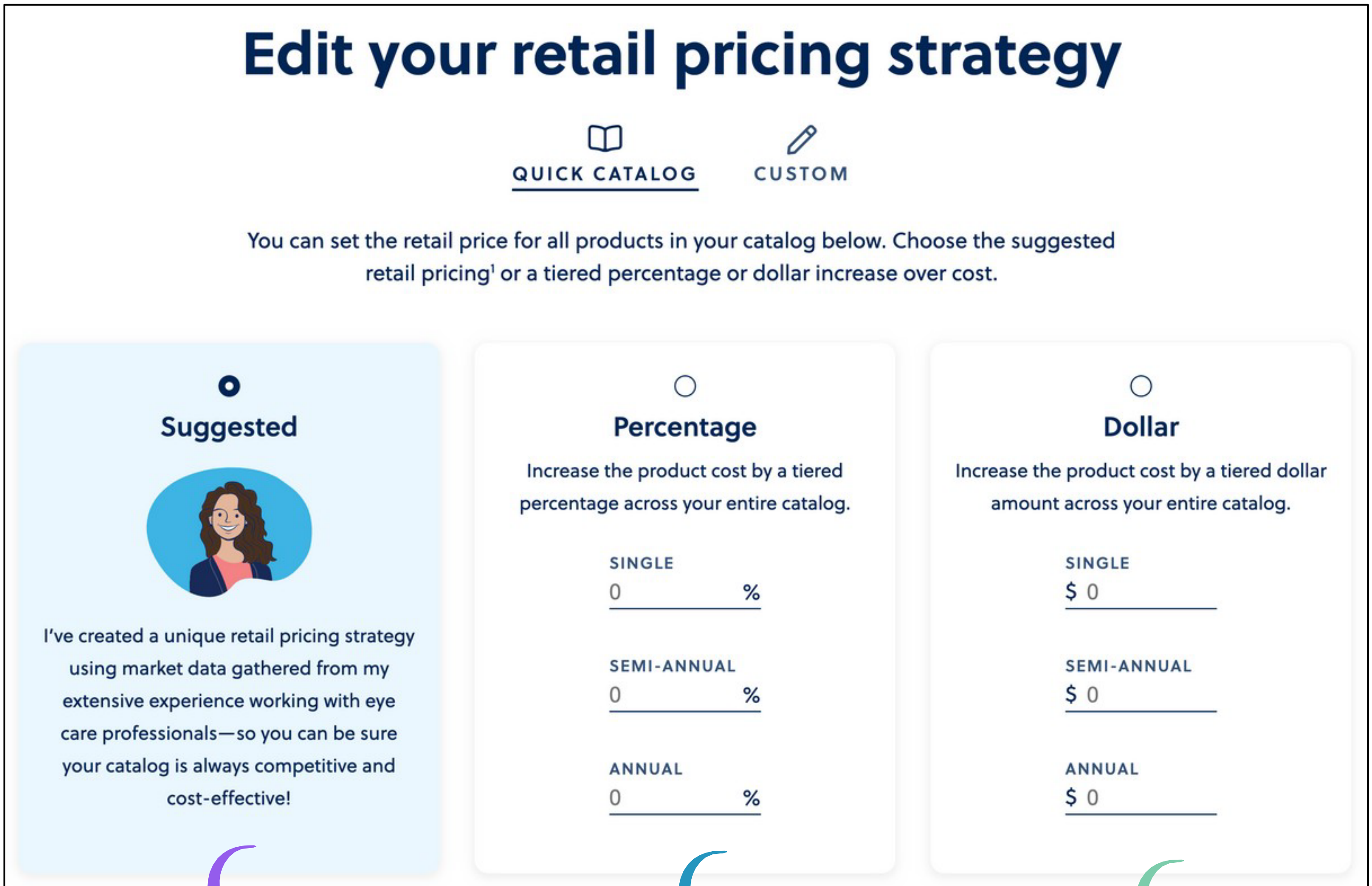


This patient's order details page will update as their order is processed.

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'.



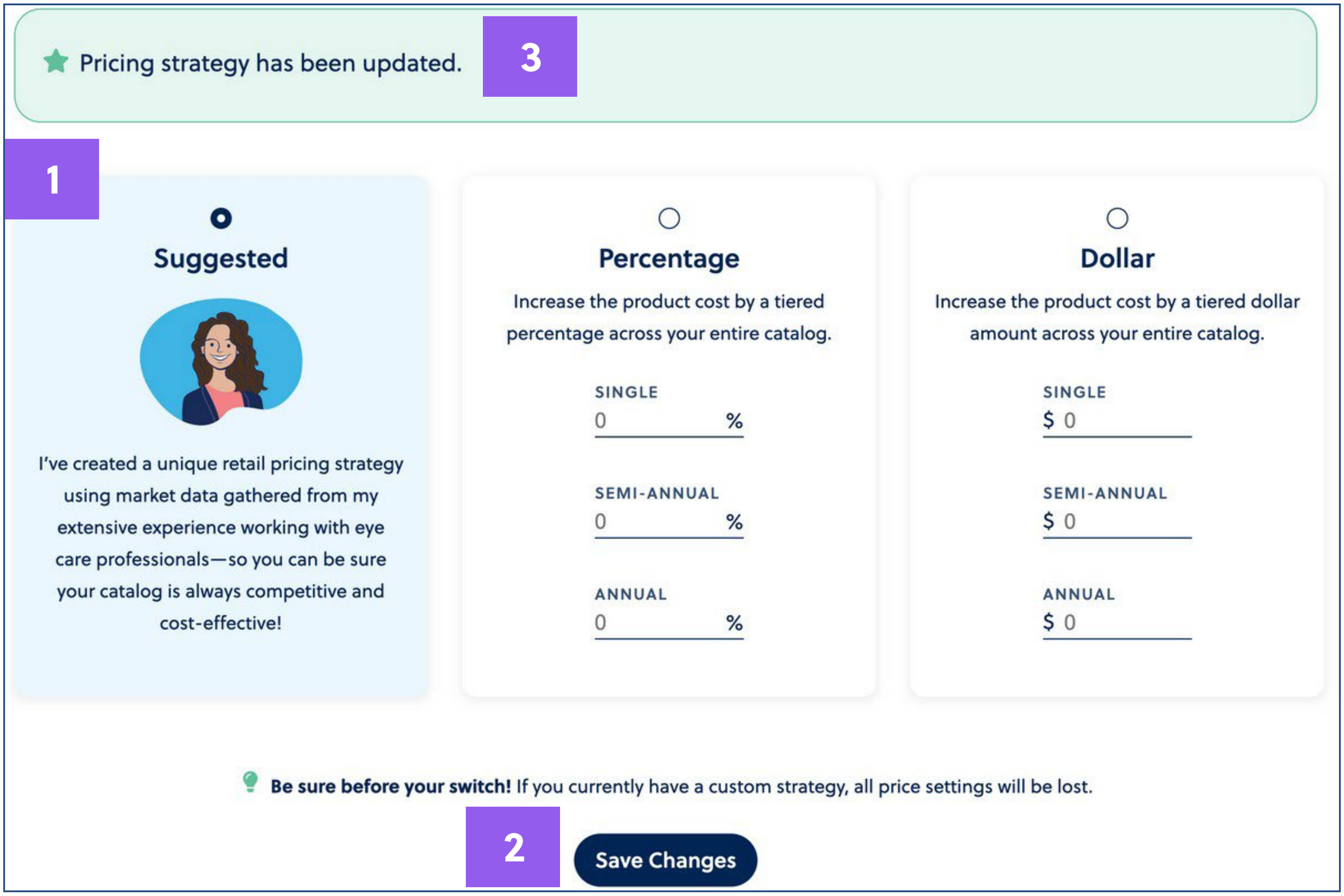
This option is based on market pricing data. Using this option allows you to set your pricing to be both effective and competitive to other practices.

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

To use Suggested Pricing

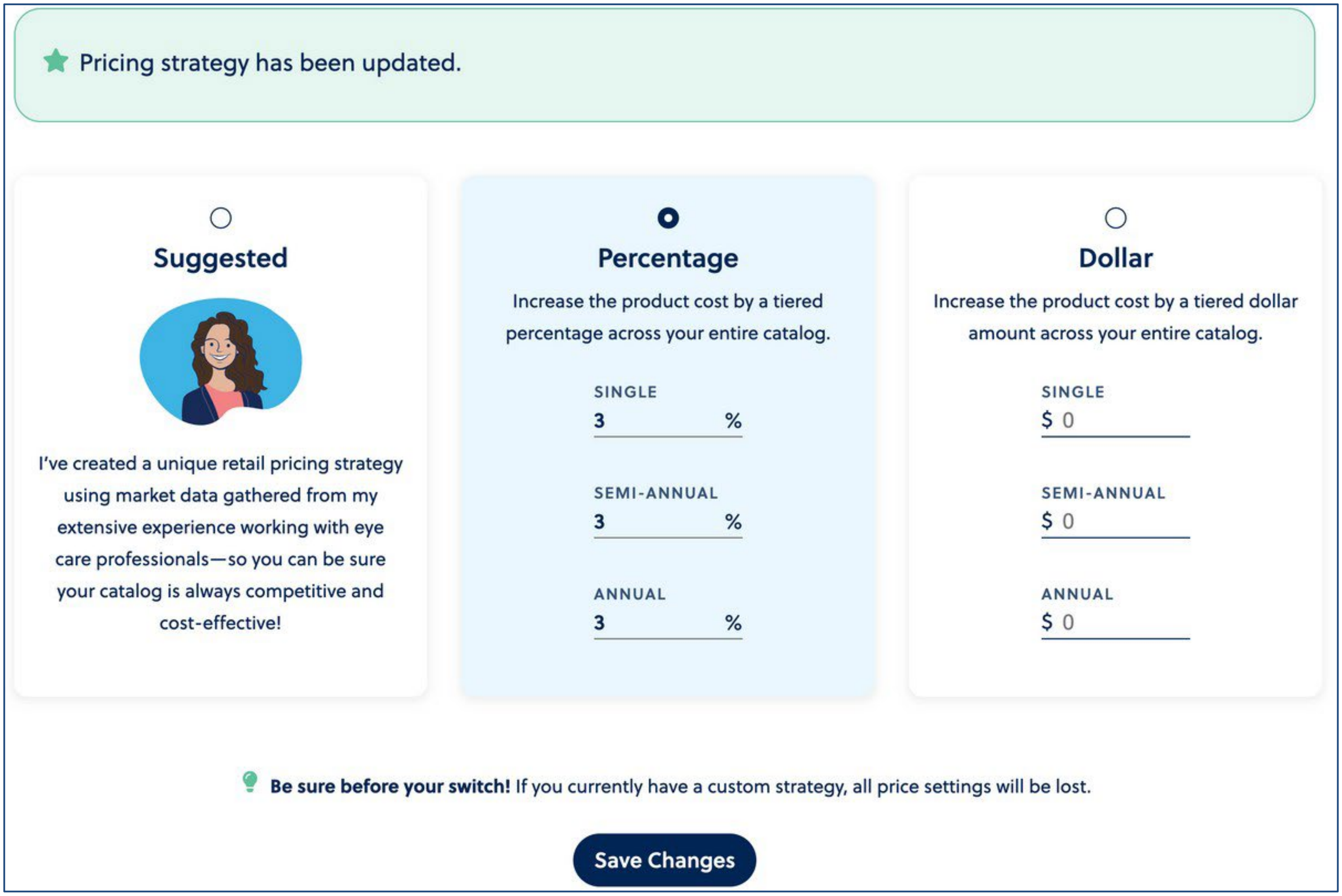
5. Click the circle in the 'Suggested' box. The selected option appears in blue. (1)
6. Click 'Save'. (2)
7. Confirm your changes by viewing the green confirmation message at the top. (3)



Set Retail Pricing Using the Quick Catalog Feature

To use Percentage or Dollar Pricing

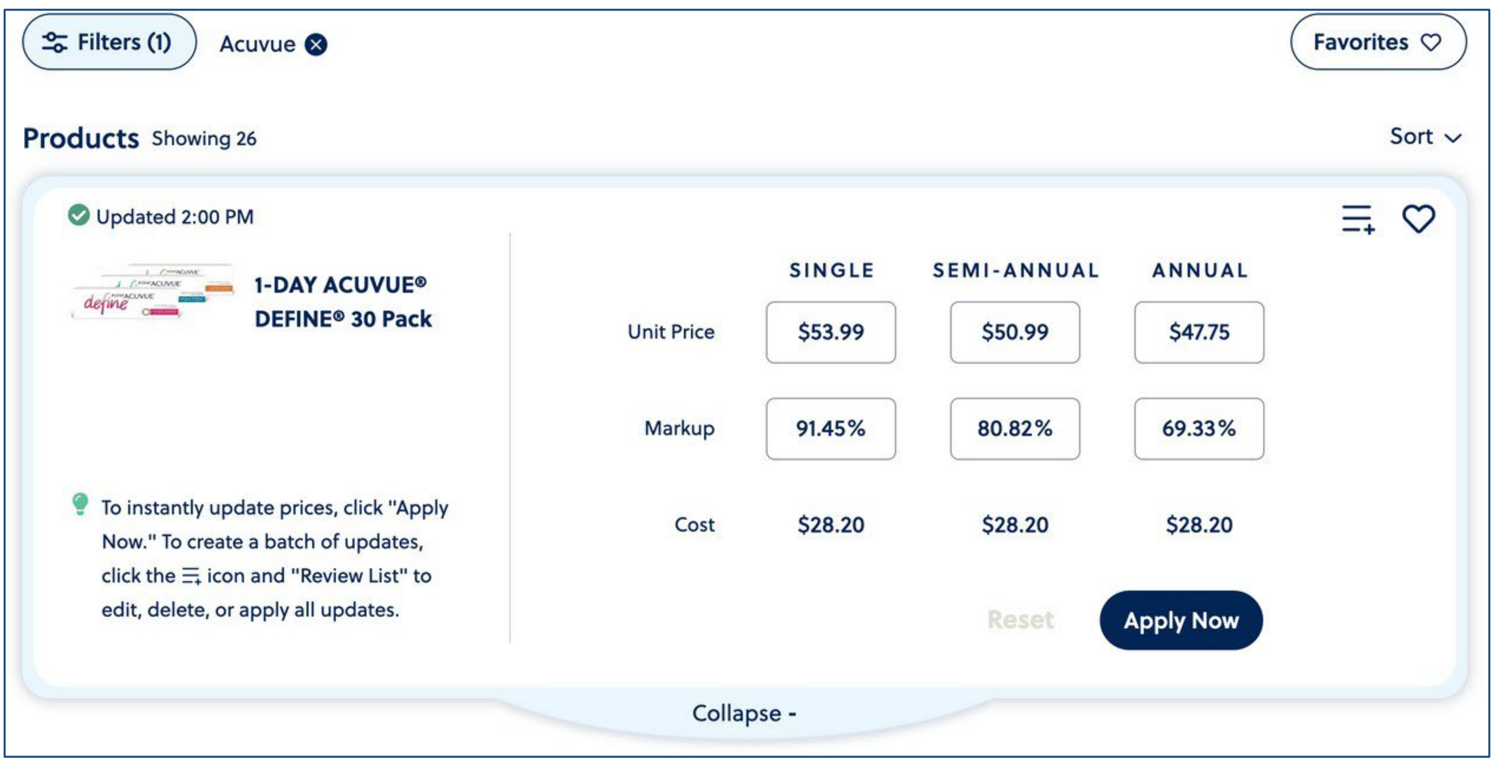
1. Click the circle in the 'Percentage' or 'Dollar' box. The selected option turns blue.
2. Type in the desired percentage or dollar increases. The new pricing will be applied to all products.
3. Click 'Save'. (2)
4. Confirm your changes by viewing the green confirmation message at the top. (3)



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.

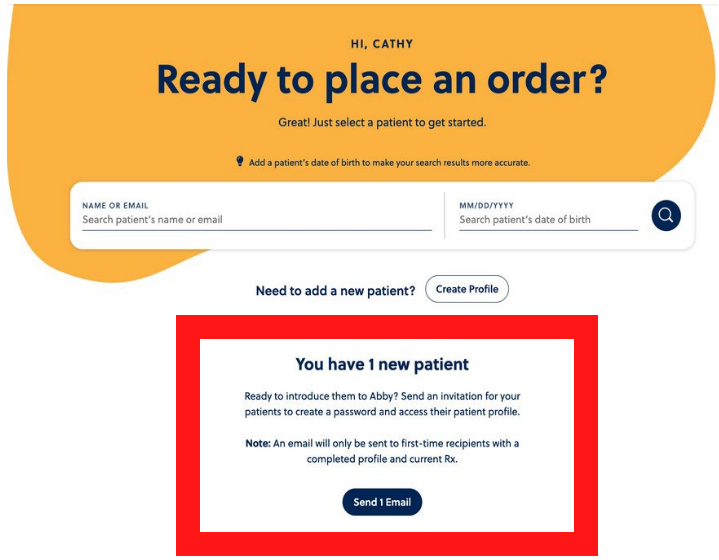
1. Click the down-facing arrow next to your account's name, at the top right of the page.
2. Click 'Manage Account.'
3. Look for the blue box on the left side of the page. Click 'Edit Pricing.'
4. Click 'Custom'. The card shown is an example of the custom pricing feature.
5. Scroll down and click 'Customize 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.



Introduce Patients to Abby via Email

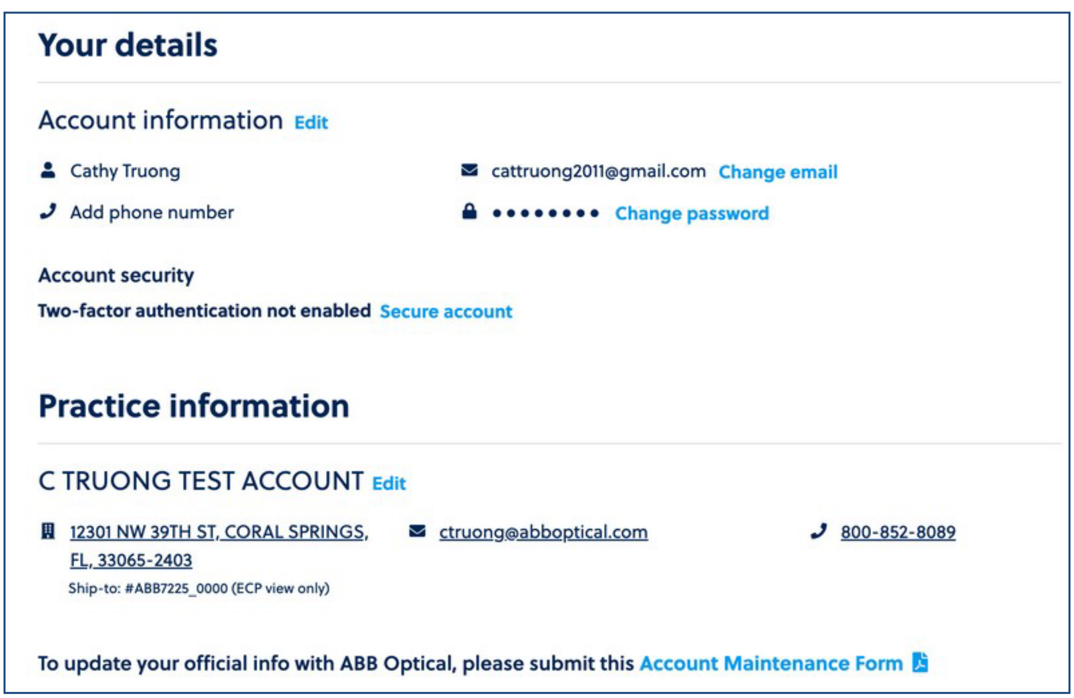
You can send patients an email welcoming them to Abby after you have created their account. After receiving the welcome email, patients can set up their own Abby account, choose a password, and track their shipments.

1. Login to your account.
2. Scroll to the bottom of the home page and look for the 'You have new patients' message.
3. Click 'Send 1 Email' and confirm on the pop-up message. You will receive a confirmation that says 'Email sent successfully!'



Update Your Account Details

4. Login to your account.
5. Click the down-pointing arrow next to your practice's name and choose 'Manage Account'.
6. Choose a detail to change and click 'Edit'. Make the changes and click 'Save'.
7. (optional) Complete and return the Account Maintenance form if you need to change other details with ABB.



Use the Abby Performance Dashboard

The Abby Performance Dashboard is a useful tool to help you gain valuable business insights into all the orders that you place through Abby. Placing all of your orders through Abby means that the dashboard will give you a clear picture of your business.

Key Points / Differences from other ABB Reporting Solutions

- Abby's Performance Dashboard reports on sales that **have been ordered through Abby**. ABB
- Business Review reports on orders that are **placed through ABB.**
- Analyze Dashboard reports on the **entire practice performance** from Office visits to Optical products.

Your Abby sales should still be entered into your practice management system so that they can be included in your overall performance.

Why Should You Use the Abby Performance Dashboard?

Abby Keeps an Eye on Your Profit Margins

You can monitor your profit margin for Contacts, overall Abby sales, and average profit margin per order. These are great financial health measures for your Contact Lens business!

Abby Eyes the Movers and Shakers

You can track your top 5 products sold through Abby and top 5 favorites. This feature is useful because you can learn which products are most popular with your customers. You can also track your bottom 5 products.

Keep Your Eyes on Performance

The Abby Performance Dashboard makes it easy for you to get into a healthy habit of measuring your practice's performance.

Watch Out for Those Shipments!

The Abby dashboard also makes it easy for you to monitor your orders shipped directly to patients.

Use the Abby Performance Dashboard

What's Included on the Abby Dashboard?

- Total # of orders placed Total # of units sold
- Average profit margin per order – Total Profit / Total # of orders Total Sales – gross revenue
- Total Profit (sales revenue – cost of goods)
- Transactions broken out by categories (Color Toric, Multifocal, Colors, Torics, Multifocal Torics and Spheres)
    - Average revenue per order – Revenue Total/# of Orders
    - Average boxes sold per order – Total # of boxes/# of Orders

- In-office inventory sold – sales by category and transaction size Percentage of units of each category
- Ship to patient – sales by category and transaction size Percentage of units of each category
- Revenue Contributors Revenue by category Revenue by modality Revenue by supply Revenue by favorites
- Top 5 products sold through Abby
- Top 5 favorite products sold through Abby Bottom 5 products sold through Abby Bottom 5 favorites sold through Abby

Details about Your Performance Dashboard

To navigate to the Abby Performance Dashboard:

1. Login to your Abby account.
2. Click the down arrow next to your practice's name, at the top right. Choose 'Dashboard.'

Interactive Table of Contents

Click a highlighted area of the image below to jump to the explanation.

abby

Top Level Filters

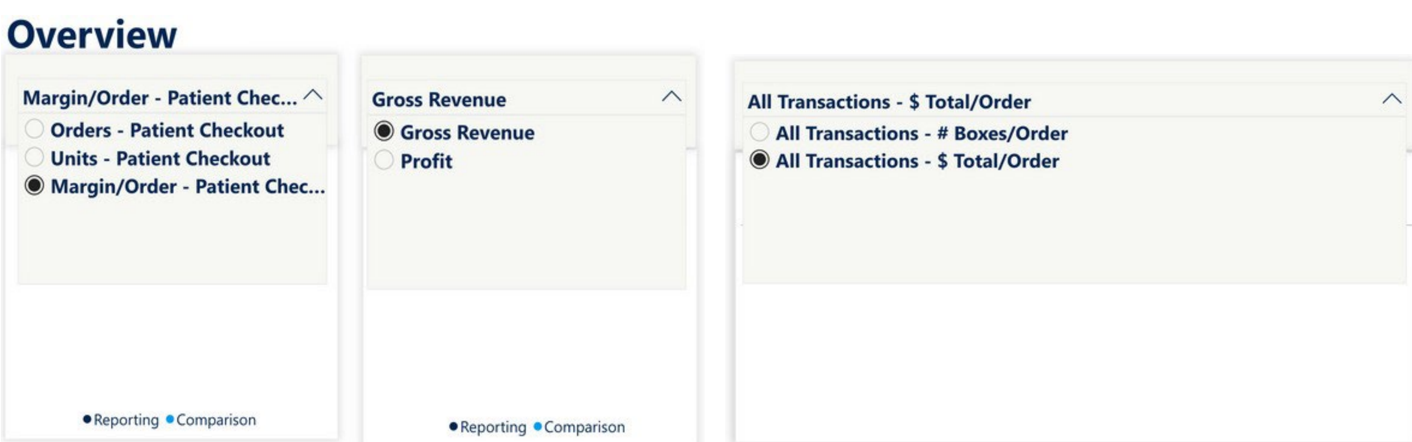
All of the data shown on the dashboard is based on the filters that you choose at the top. Start by choosing an office location. If you only have one location, leave the option set to 'All.'

Reporting Period: Select 'All' to view all data from since you began to use Abby. Select the drop-down menus to see more date options: year, quarter, or week.

Comparison Period: Select 'All' to set a period to compare to the reporting period. For example, if you want to compare your sales from March 2022 to April 2022, choose 'March 2022' in the Reporting Period and 'April 2022' in the Comparison Period.

Overview

The Overview section is a quick way to check the overall revenue and profit from all orders placed through Abby.



Margin/Order-Patient Checkout Section

The data in this section shows *only* directly shipped to patient orders.

Orders: shows the total amount of all orders for the selected filters

Units: shows a comparison of the profit margin per number of boxes/units ordered

Example: Dr. Claiborne's West Seattle office sold higher priced boxes of lenses in January vs. February, which increased the per box profit margin.

Margin / Order: shows a comparison of the profit margin for orders

Example: At Dr. Jurens's practice, the profit margin per customer order was $47.50 in March vs. $43.50 in February.

Gross Revenue Section

Gross Revenue: shows the incoming revenue based on the selected filters

Profit: shows the profit (revenue minus cost of goods) based on the selected filters

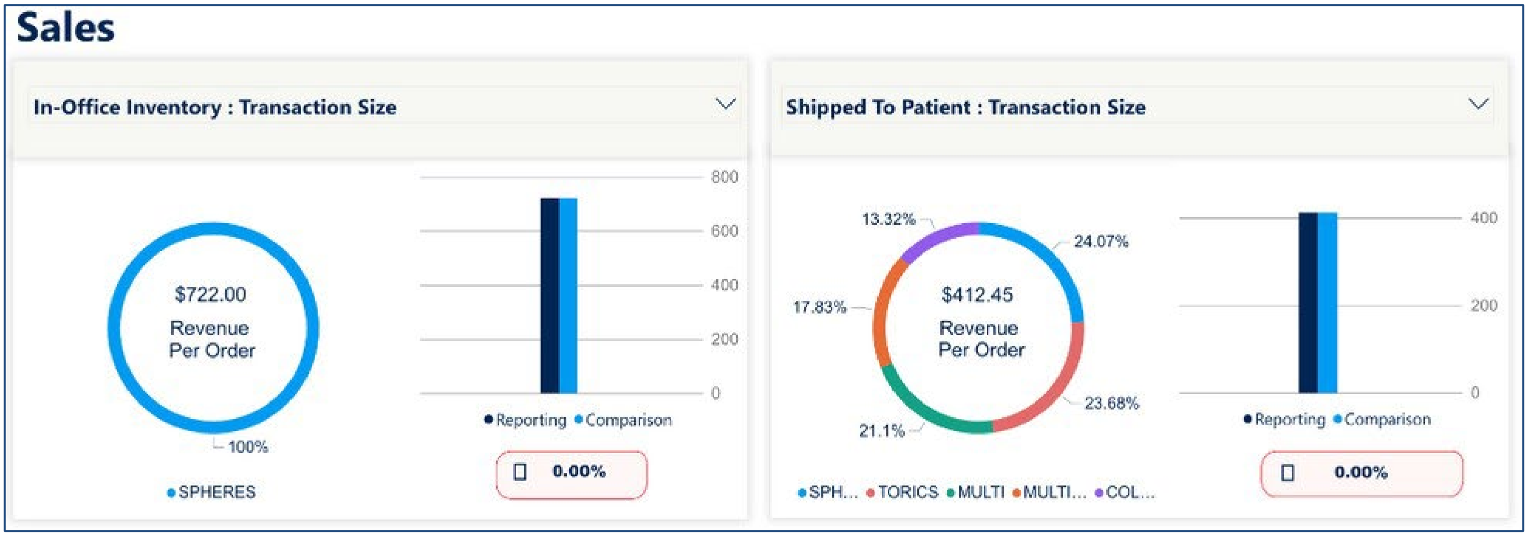
All Transactions - $ Total/Order

All Transactions - # of Boxes / Order: shows a comparison of the number of boxes sold per order, based on the filters

Dr. Martinez's office sold an average of 4 boxes per order in January vs. an average of 2 boxes per order in February.

Sales

The sales section shows sales data that can be filtered by category or transaction size.

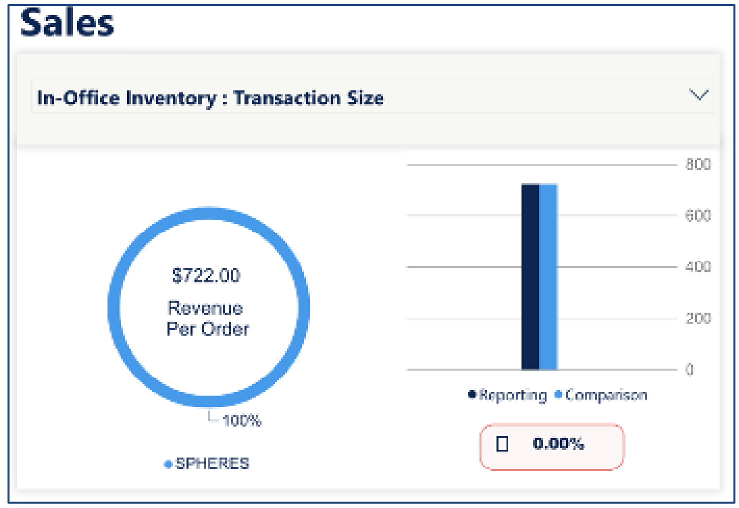


**Click the downward arrow in the gray area to view the options explained below.*

In-Office Inventory- Sales by Category: shows a comparison of the types of products ordered through in-office sales

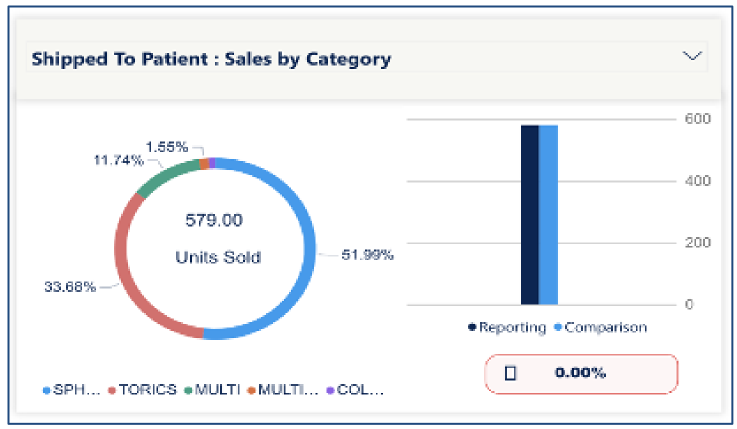
Example: Dr. James's office only sold sphere contact lenses during the first week of January.

In-Office Inventory- Transaction Size:
shows a comparison of the transaction size of orders placed in the office



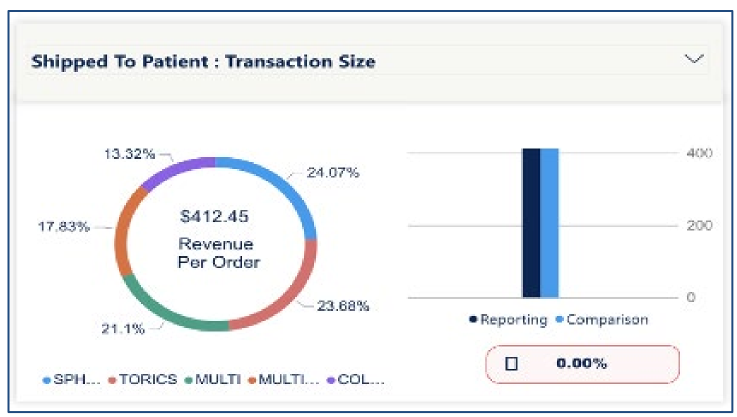
Example: The back-to-school marketing campaign at Dr. Emmons's office was a huge success! The office achieved an average revenue of $722 per order during the first week of August.

Shipped to Patient- Sales by Category:
shows a comparison of the types of products ordered that were shipped directly to the patient



Example: Toric lenses accounted for over a third of Dr. Truong's sales during Q2 of 2022.

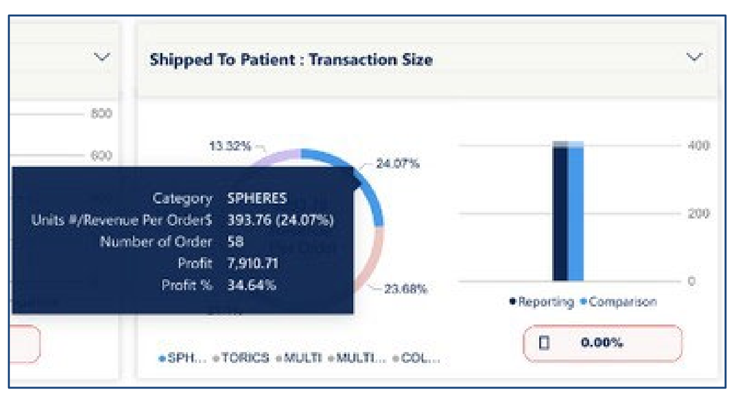
Shipped to Patient- Transaction Size:
shows a comparison of the transaction size of orders that were shipped directly to the patient.



Example: Overall, the toric lenses that Dr. Rosano's team sold in July contributed to almost 24% of her revenue for the month.

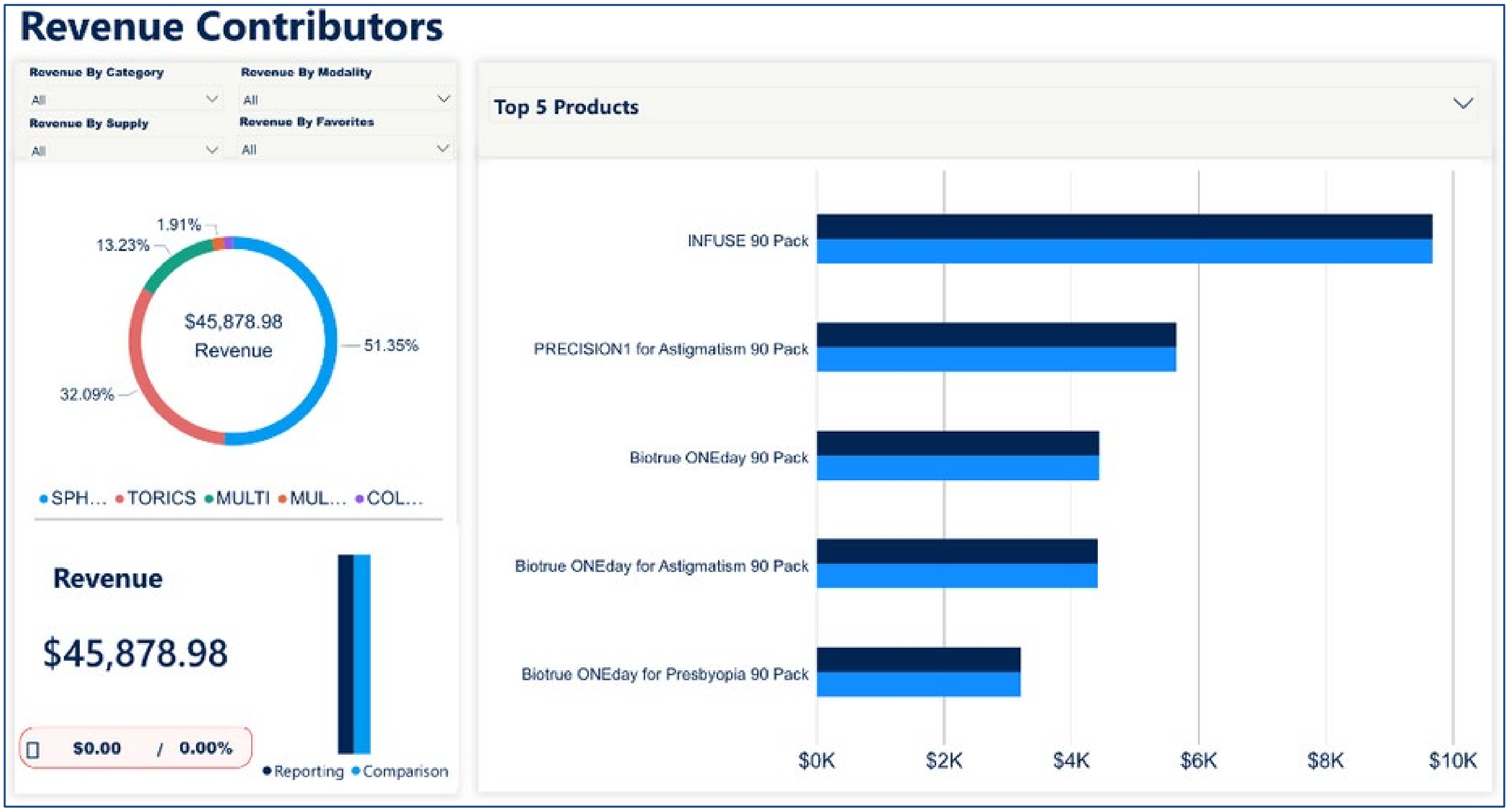
You can click any segment of the circle graph to get more specific detail about the data.

In this example, clicking the blue 'SPHERES' section shows us the revenue per order, number of orders, profit, and profit percentage for the chosen time



Revenue Contributors

The revenue contributors section shows sales data related to the revenue a practice has earned broken out by category, supply, modality, and favorites.



Revenue Options (top left)

Click each down arrow on the top, left side to filter the data by these options:

Revenue by Category

- Select all (view all categories)
- Color Toric
- Colors Multifocal
- Multifocal Toric
- Multifocal D/N
- Spheres
- Torics

Revenue by Modality

- Select all (view all categories)
- Conventional Wear
- Daily Disposable
- Extended Wear/1 Week Replacement
- Extended Wear/2 Week Replacement
- Monthly Replacement

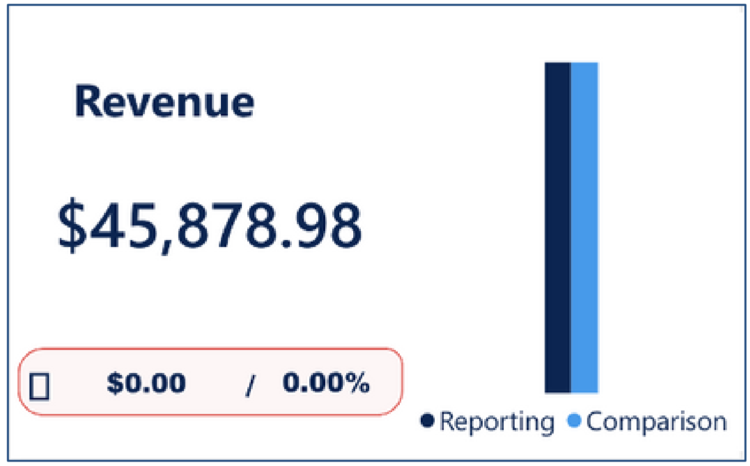
Revenue by Supply

- Select all (view all categories)
- 10-Days
- 12-Months
- 1-Months
- 2-Months
- 3-Months
- 6-Months

Revenue by Favorites

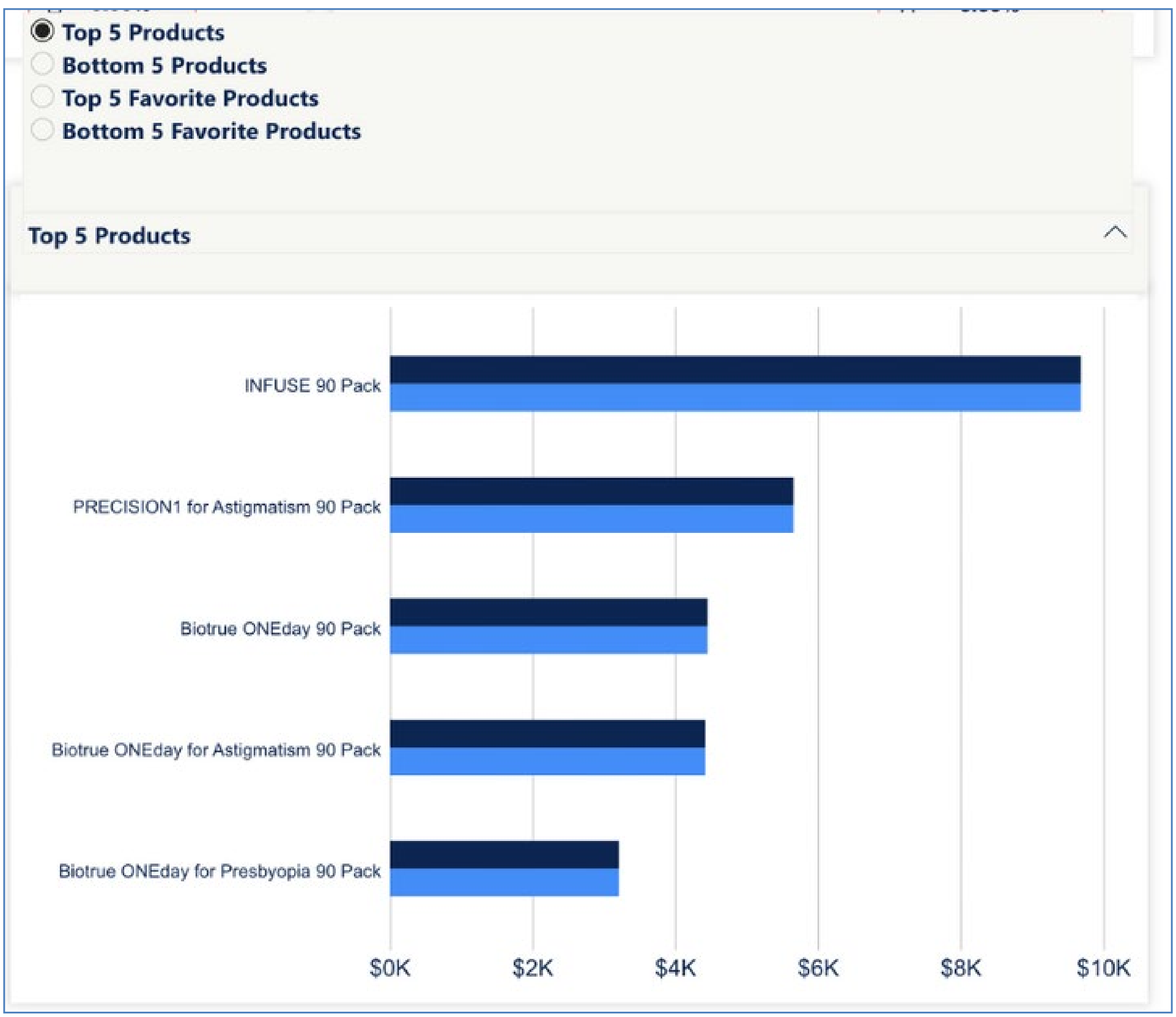
- Select all (view all categories)
- No

Revenue (bottom left): Shows the total revenue from the two periods selected from the filters at the top of the page.



Top 5 Products (right side): Click the down arrow on the right side to select to view revenue data for your top 5 selling products, bottom 5 selling products, top 5 selling favorited products, and bottom 5 favorited products.

Quick reminder: you can mark a product as a 'favorite' in your pricing catalog.
Click here to go to the Training Portal to learn more.



Product Sales Detail Tab (bottom of screen)

From the default Performance Dashboard tab (aka 'Daily Sales'), scroll to the bottom of the page. Click the 'Product Sales Detail' tab.

On this tab, you can use the filters at the top in the same way as on the default page:

- Choose a location
- Select a date range
- Filter by specific Sales Order Number Choose a product category
- Filter by modality, supply, or favorited product

After making your selections, view the line-by-line data. Note that you can scroll both vertically using the bar on the right and horizontally using the bar at the bottom. Click the arrow inside the circle at the top left to go back to the default page.

FILTERS

"Press Ctrl For Multi Selection"

Location: All | Date: All | Sales Order Number: All | Product Category: All

Modality: All | Supply: All | Favorite: All

Sales Order Number	Product Category	Product Name	Product Type	Modality	Pack Size	Favor
AY000001759	COLORS	AIR OPTIX® COLORS 6 Pack	Colored/Cosmetic	Monthly Replacement	6	No
AY000001759	COLORS	AIR OPTIX® COLORS 6 Pack	Colored/Cosmetic	Monthly Replacement	6	No
AY000002964	COLORS	AIR OPTIX® COLORS 6 Pack	Colored/Cosmetic	Monthly Replacement	6	No
AY000003652	COLORS	AIR OPTIX® COLORS 6 Pack	Colored/Cosmetic	Monthly Replacement	6	No
AY000001366	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000001366	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000001553	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000001799	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000001799	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000002090	MULTI	DAILIES TOTAL1® Multifocal 90 Pack	Multifocal	Daily Disposable	90	No
AY000002194	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000002194	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000002219	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002219	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002231	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002231	MULTI	AIR OPTIX® plus HydraGlyde® Multifocal 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002439	MULTI	1-DAY ACUVUE® MOIST MULTIFOCAL 90 Pack	Multifocal	Daily Disposable	90	No
AY000002439	MULTI	1-DAY ACUVUE® MOIST MULTIFOCAL 90 Pack	Multifocal	Daily Disposable	90	No
AY000002557	MULTI	ULTRA with MoistureSeal for Presbyopia 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002557	MULTI	ULTRA with MoistureSeal for Presbyopia 6 Pack	Multifocal	Monthly Replacement	6	No
AY000002576	MULTI	DAILIES TOTAL1® Multifocal 90 Pack	Multifocal	Daily Disposable	90	No
AY000002576	MULTI	DAILIES TOTAL1® Multifocal 90 Pack	Multifocal	Daily Disposable	90	No
AY000002961	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No
AY000002961	MULTI	Biotrue ONEday for Presbyopia 90 Pack	Multifocal	Daily Disposable	90	No

Data Columns Shown on the Product Sales Detail Tab

Sales Order Number	Order number associated with the specific sale
Product Category	Category of lens, such as color, toric, or sphere
Product Name	Name of the product
Product Type	Type of lens, such as multi-focal or cosmetic
Modality	Lens classification based on replacement frequency, such as daily
Pack Size	Number of lenses per pack
Favorite	Status of the item as "favorited" in the Product Catalog
Order Type	Denotes if the order was shipped to the patient or fulfilled from in-office inventory
Tracking Number	Tracking detail provided by the carrier
Location Name	Name of the location selected in the filters at the top
Order Date	Date of the patient's order
Order Status	Order status such as shipped, canceled, or fulfilled by office inventory
Patient Name	Name on the patient's account
Eye	Left eye: OS or Right eye: OD
DOB (Date of Birth)	Date of birth associated with the account
Email	Email address associated with the order
Phone	Phone number associated with the order
Supply	Length of supply ordered, such as 3, 6, or 12 months
Quantity	Number of boxes ordered
Cost Total	Cost of goods charged to the office
Retail Gross Total	Amount the patient paid for the order
Discount Allowance Total	Amount of discounts applied to the order
Tax Total	Total amount of tax charged to the order
Retail Net Total	Net total after discounts

Use the Abby Order Status Dashboard

The Abby Order Status Dashboard provides you with a one-stop view of all of your practice's orders from the last 12 months, year to date, the current month, or the current week.

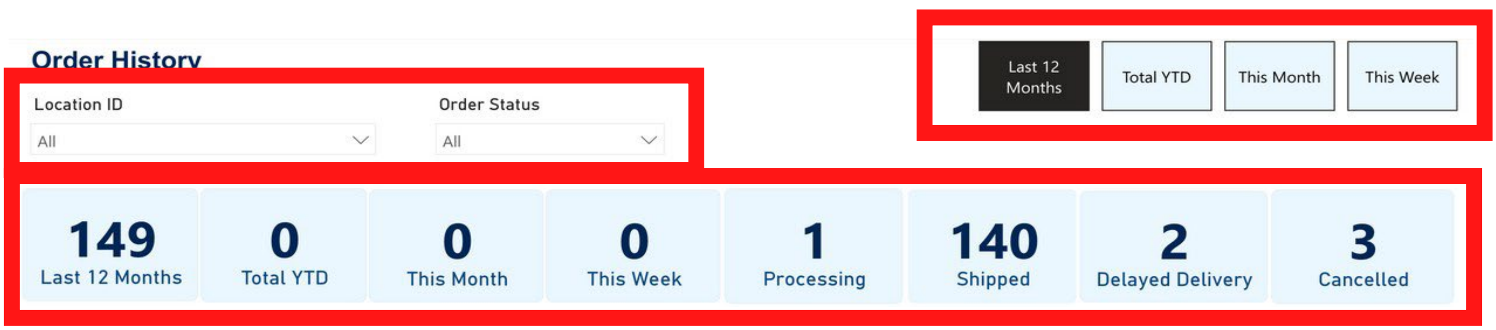
To access the Order Status Dashboard:

- Login to your Abby account.
- Click the downward arrow at the top right of the page.
- Choose 'Order Status.'

Information shown on the Order Status Dashboard

- Order Number
- Order Type
- Order Date
- Order Status
- Tracking Number
- Product Name
- Patient Name

Choose a **location ID**, set the **order status filter**, and/or click any of the **blue tiles** to update the data shown in the columns below.



Adjusting any of the filters highlighted above updates what is shown below.

Scroll to the bottom of the page to **use the horizontal scroll bar** to see all the details.

Order Number	Order Type	Order Date	Order Status	Tracking Number	Product Name	Patier
AY000006163	ShiptoPatient	07/19/22	Shipped	1Z01R22VYW06285651	1-DAY ACUVUE® MOIST 90 Pack	Patient
AY000010521	ShiptoPatient	09/26/22	Shipped	1Z01R22VYW08099493	1-DAY ACUVUE® MOIST 90 Pack	Patient
AY000003159	ShiptoPatient	05/13/22	Shipped	1Z247588YW07649562	1-DAY ACUVUE® MOIST 90 Pack 1-DAY ACUVUE® MOIST 90 Pack	Patient
AY000003784	ShiptoPatient	05/26/22	Shipped	1Z247588YW08161372	1-DAY ACUVUE® MOIST 90 Pack 1-DAY ACUVUE® MOIST 90 Pack	Patient
AY000004240	ShiptoPatient	06/07/22	Shipped	1Z247588YW08577254	1-DAY ACUVUE® MOIST 90 Pack 1-DAY ACUVUE® MOIST 90 Pack	Patient