

TOMS Lab Job Track — Manual

Frame and lens jobs from Queued to Complete

A walk-through for dispensers, lab technicians and front-of-house covering the life of a lab job — from the moment the optometrist clicks *Add to Job Queue* on an exam to the patient collecting their finished spectacles.

The lab job is the practice's single source of truth between the optometrist and the lab. Once the optometrist hands a Final RX off, every party — lab, dispenser, front desk — works from the snapshot recorded in the job. Edits to the original exam *after* the job is queued don't reach the lab; if the frame, lens or addons change after handover, the change goes on the job itself.

At a glance — the stages

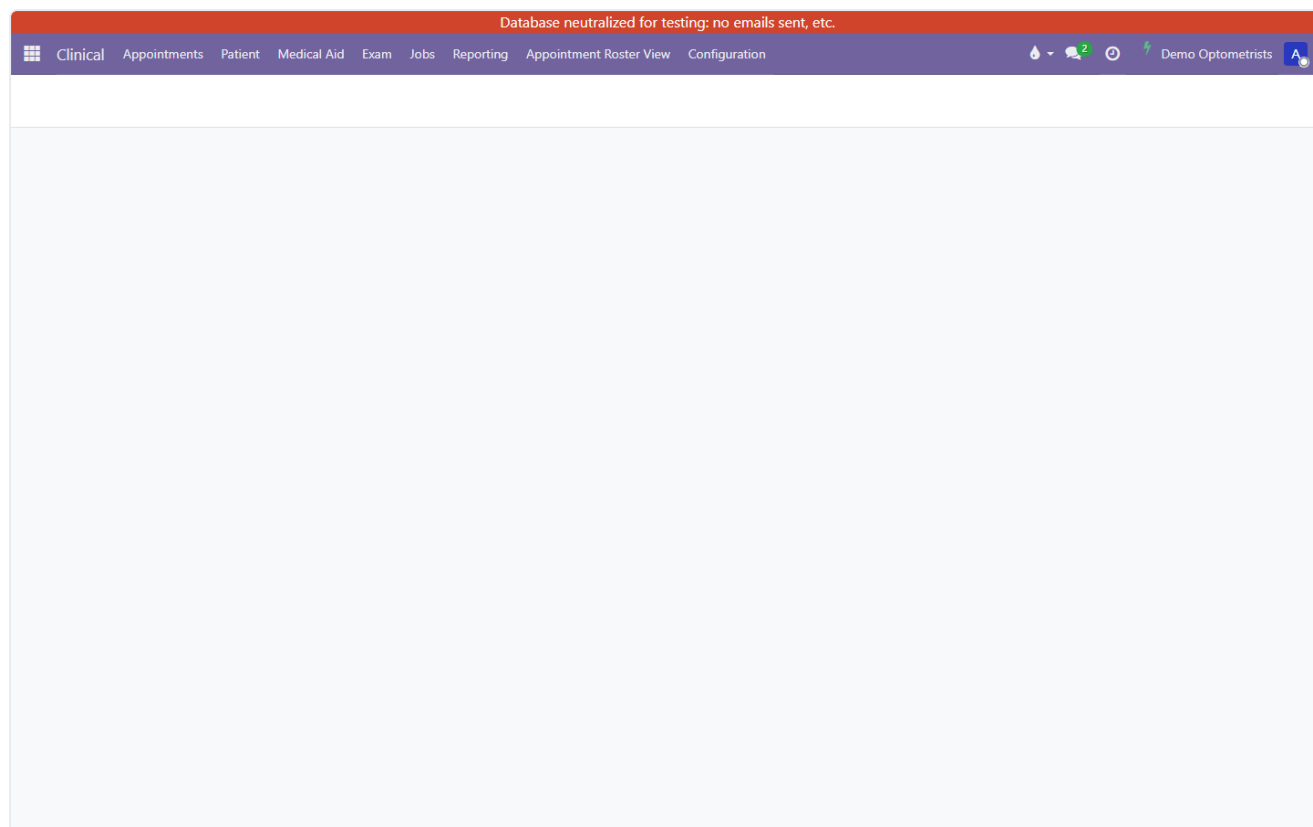
Stage	Who's responsible	What's happening
Queued	Dispenser	Job has been created from a Final RX. Frame is on the way to the lab, lens spec is locked in.
In Progress	Lab technician	Lab has the job in hand — cutting lenses, fitting them into the frame.
In Workshop	Lab technician	Hand-finishing — polishing edges, anti-reflective coating, addons.
Awaiting Customer Collection	Dispenser / Front desk	Job is done, back at the practice. Front desk calls the patient.
Complete	Front desk	Patient has collected. Job closes; nothing more to do.

The job lives under **Job Tracking** as a top-level app, *and* under **Clinical** → **Jobs**. Both views read the same data — pick the one that fits your day:

- *Job Tracking* (separate app) gives the lab the kanban with full filtering and drag-and-drop between stages. This is the lab's daily view.
- *Clinical* → *Jobs* gives the optometrist a peek at jobs raised from their own exams without leaving the clinical workspace.

1. Sign in

Sign in to TOMS. The lab job lives in two places — the dedicated **Job Tracking** app at the top-left grid, and under **Clinical** → **Jobs** inside the Clinical workspace. They show the same data; this manual uses the Job Tracking app because that's the lab's home.

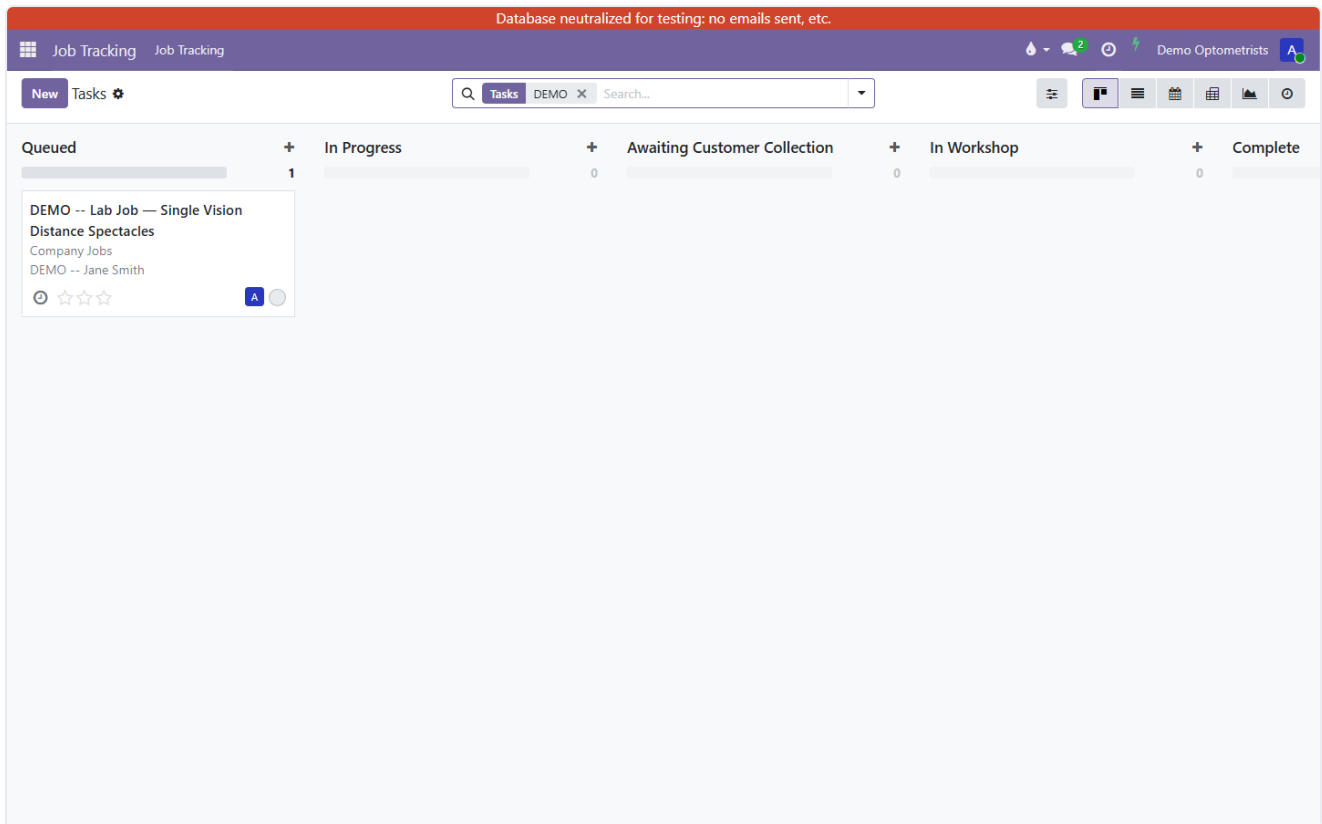


Tips

- If you don't see Job Tracking in the apps grid, ask your practice manager — your user may not be in the Lab group.

2. The lab kanban

Open the **Job Tracking** app from the grid. The kanban shows every job at the practice, grouped by stage: *Queued*, *In Progress*, *Awaiting Customer Collection*, *In Workshop*, *Complete*. The number at the top of each column is the count of jobs at that stage. Dragging a card between columns moves the job through the workflow.

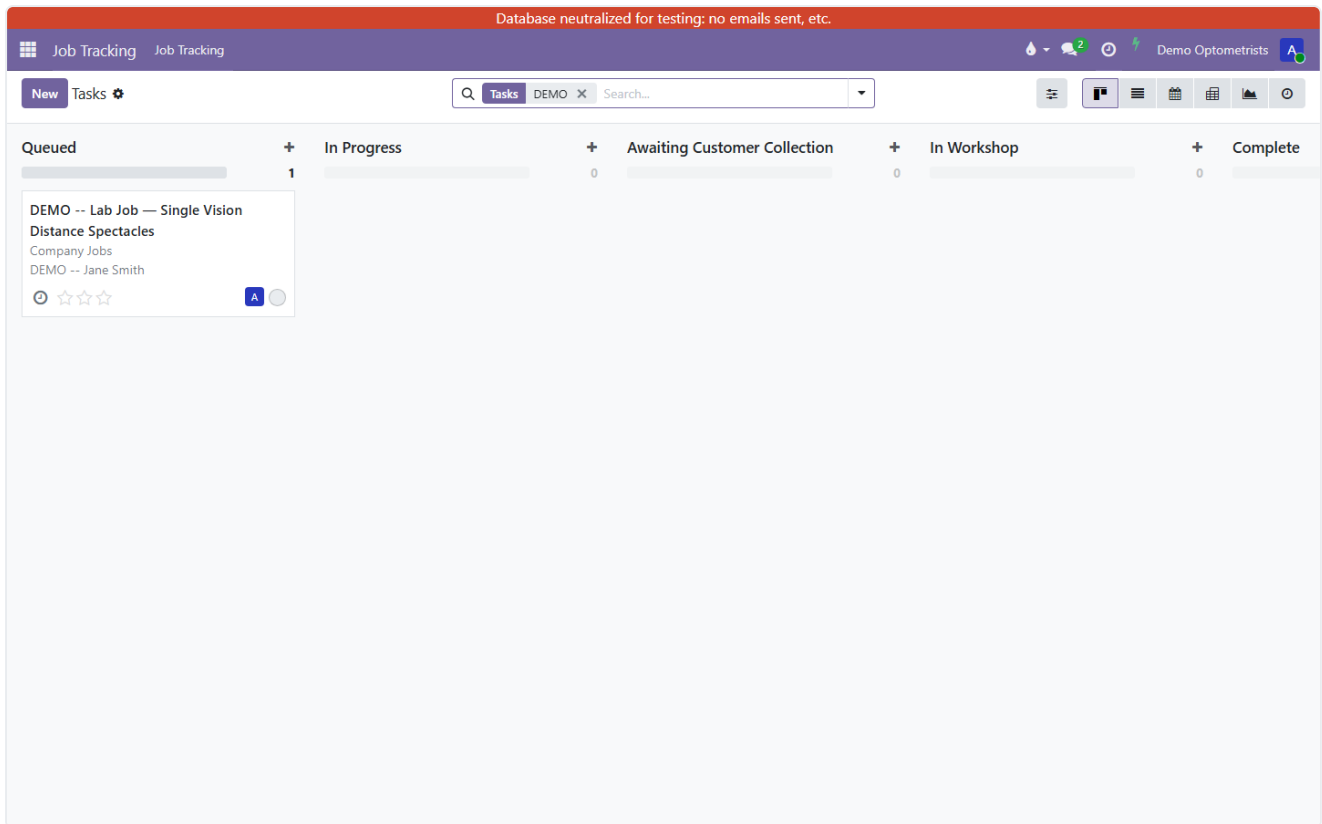


Tips

- Drag the bottom-most card of a busy column to move the oldest job first — the lab's natural FIFO.
- The little clock icon on each card turns red when a job goes past the SLA. Configure SLAs in *Configuration* → *Job Tracking* → *SLA Policies*.

3. Find a specific job

Type a patient name, frame brand, optometrist or invoice number into the **Search** box at the top of the kanban. TOMS narrows the kanban as you type, so you can see only the jobs that match. Press the **filter** funnel (top-right) to layer in extra criteria like *Stage*, *Assignee* or *Created this week*.



Tips

- Pin a filter as a favourite (the *Favourites* tab inside the filter panel) so the kanban opens to it next time.
- Save *My Jobs* as a favourite filter on each lab technician's user to give them a one-click filtered worklist on login.

4. The job form

Click a card to open the job. The form pulls together everything the lab needs in one place — patient, frame, lens material, lens type, addons, prescription summary and the linked invoice. The **Status** badge in the top-right ribbon (New → In Progress → Done) is the lab's own progress; the **stage dropdown** further down on the form is what moves the card between kanban columns.

Job Tracking

Job Tracking

Database neutralized for testing: no emails sent, etc.

2

Demo Optometrists

New

Tasks

DEMO -- Lab Job — Single Vision Distance Spec...

⚙

Purchase

1 / 1

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Print

Send Sms

Queued 1m

In Progress

Awaiting Customer Collection

In Workshop

Complete

Send message

Log note

Activity

🔍

🔗

👤 1

DEMO -- Lab Job — Single Vision Distance Spectacles

☆☆☆ In Progress

Job Number

JOB-000021

Customer

DEMO -- Jane Smith

Order Date

Jun 15, 5:46 PM

mobile

+27 82 555 0100

Exam

phone

Deadline

Work Phone

Assignees

A

Administrator

Email

jane.demo@example.com

Job Type

Spectacles

Repurchase

☐

Physical Location

Co-Payment 0.00

Tray

Final RX (Spectacles)

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
	0.00	0.00	0		0.00		0.00	0.00	0		0.00	

Fitting Details

Description

Sub-tasks

Add details about this task...

Today

A

Administrator 5:46 PM

Stage changed

Queued → In Progress (Stage)

A

Administrator 5:46 PM

Task Created

Tips

- If the lab is split between cutting and fitting, use the *In Workshop* stage for hand-finishing work and reserve *In Progress* for the cutting machines.

6. Ready for the patient

When the finished spectacles are back at the practice, set the job's status to **Awaiting Customer Collection**. Reception sees the change immediately — the patient's name surfaces on the diary view with a *Collection ready* tag, and a templated SMS or email to the patient can be triggered from the *Send message* button.

Database neutralized for testing: no emails sent, etc.

Job Tracking

Job Tracking

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Demo Optometrists

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Tasks

DEMO -- Lab Job — Single Vision Distance Spec...

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1 / 1

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Send Sms

Queued 1m

In Progress

Awaiting Customer Collection

In Workshop

Complete

Send message

Log note

Activity

1

DEMO -- Lab Job — Single Vision Distance Spectacles

☆ ☆ ☆

In Progress

Job Number

JOB-000021

Customer

DEMO -- Jane Smith

Order Date

Jun 15, 5:46 PM

mobile

+27 82 555 0100

Exam

phone

Deadline

Work Phone

Assignees

Administrator

Email

jane.demo@example.com

Job Type

Spectacles

Repurchase

☐

Physical Location

Co-Payment

0.00

Tray

Final RX (Spectacles)

Name	Sph	Cyl	Axis	Prism	Add	Va	Sph	Cyl	Axis	Prism	Add	Va
	0.00	0.00	0		0.00		0.00	0.00	0		0.00	

Fitting Details

Description

Sub-tasks

Add details about this task...

Today

Administrator 5:46 PM

Stage changed

In Progress → Awaiting Customer Collection (Stage)

Administrator 5:46 PM

Stage changed

Queued → In Progress (Stage)

Administrator 5:46 PM

Task Created

Tips

- Save a *Glasses ready for collection* template under *Configuration* → *Email Templates* so reception doesn't have to type the message every time.
- If the patient has opted into WhatsApp via the WhatsApp module, TOMS sends the collection notice through WhatsApp instead of SMS.

7. Patient collects

When the patient walks out wearing their new spectacles, set the job to **Complete**. The card moves into the *Complete* column and falls out of the dispenser's daily filter; the patient's Sales/Tasks smart-button count updates so the visit's full history is one click away the next time they're booked.

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Fitting Details

Description

Sub-tasks

Add details about this task...

Today

Administrator 5:46 PM

Stage changed

Awaiting Customer Collection → Complete (Stage)

Administrator 5:46 PM

Stage changed

In Progress → Awaiting Customer Collection (Stage)

Administrator 5:46 PM

Stage changed

Queued → In Progress (Stage)

Administrator 5:46 PM

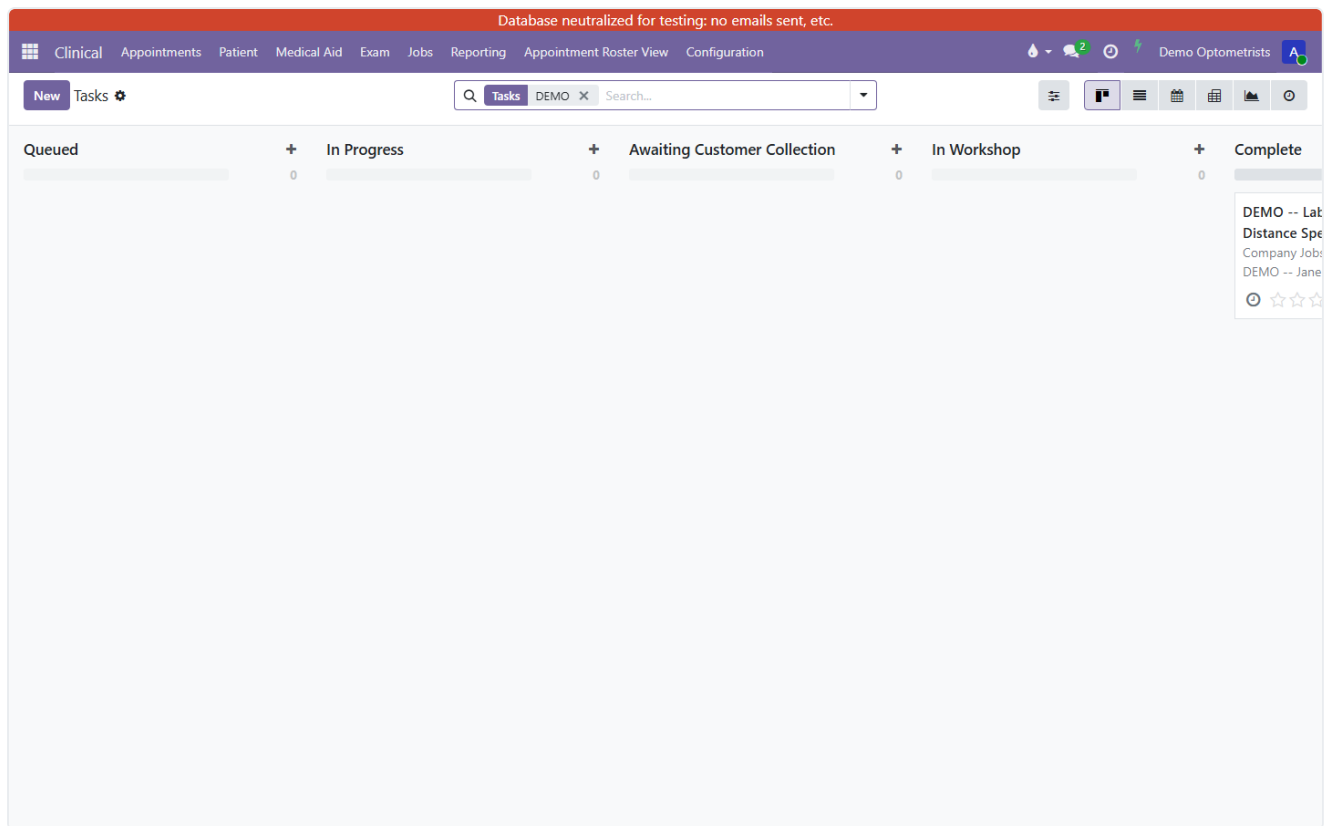
Task Created

Tips

- Complete jobs are kept indefinitely — they're the practice's audit trail of what was dispensed to whom. Don't archive them, even years later; they're needed for medical-aid audits and remake claims.

8. The optometrist's view

From the Clinical app, **Clinical** → **Jobs** shows the same data scoped to the optometrist's recent exams. Use this view when an optometrist wants to peek at the lab progress on the jobs they raised today without leaving the clinical workspace. All the filtering and stage moves available in Job Tracking work here too — it's the same record, viewed from another angle.



Tips

- Combine the *Optometrist* and *Stage* filters here to triage a morning's worth of jobs in seconds.

Troubleshooting

What happened	Why it happens	What to do
Job is in <i>Queued</i> but no PO is visible	The Final RX line had no consumable products configured	Open the exam, fix the Final RX line's products, click <i>Add to Job Queue</i> again — the existing job updates rather than duplicating
Drag-and-drop between stages doesn't stick	The stage isn't in the same project	Open the job and use the <i>Status</i> dropdown in the top-right of the form instead
Job is in <i>Awaiting Customer Collection</i> but doesn't appear on the diary	Patient phone number was missing on the partner record	Add the mobile number on the patient, then change the job status to <i>Complete</i> and back
Lab needs to put the job on hold (waiting for stock)	TOMS has no <i>On Hold</i> stage by default	Leave the job in <i>In Progress</i> and add a note in the chatter; the lab dashboard filters on this
Frame on the job is wrong	Frame was changed in stock after <i>Add to Job Queue</i> fired	Edit the job directly — the lab works from the job, not the exam, so the change reaches them

Where to learn more

- The **Configuration** → **Job Tracking** menu inside the app holds stage definitions and the colour scheme. Talk to your practice manager before reordering or renaming stages — the dispense dashboard, the recall letter and the customer-collection workflow all key off stage names.
- For supplier issues (PO doesn't show up, lab can't be reached) log a helpdesk ticket. Include the job number and the patient number so support can dig from either end.
- The Clinical & Dispensing course on training.humint.co.za walks the lab side of the workflow on video, with screen-share footage from a real practice.

How this manual stays current

Like the Clinical manual, the screenshots here are generated by a Playwright walkthrough that creates a fictional patient, an exam, an invoice and a lab job on a sanitised copy of the production database. The job appears in the kanban exactly as the dispenser sees it. Re-running the walkthrough after every TOMS update would catch any change in the kanban stages, the job form fields or the smart buttons before the practice sees them.