

# INVENTORY MANAGEMENT

## Operations Guide

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# INVENTORY MANAGEMENT OVERVIEW



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**Inventory Management** is EssilorLuxottica's **inventory movement and supply ordering platform**. Although, Ciao! Optical will automatically account for inventory replenishment, there are business situations that will require a manual adjustment of inventory through the **Inventory Management System** and Fiori Applications.

**All job roles will have access to the platform.** It is important that each team member is familiar and complies with these processes. Failure to do so negatively impacts inventory accuracy and replenishment:

- Assign the site when accessing the platform for the first time to perform any activities.
- Prior to making inventory adjustments or ordering supplies, confirm the correct site listed.
- Ensure all direction provided in communications or this guide is followed when completing inventory related activities.

Luxottica Fiori Apps

Change Site	UPC Search	Stock Summary	Shipment Log with Confirmation	Inventory Adjustment	Create Store to Store Transfer	In-Store Damages Fiori	Damage Disposition Fiori	Damage Disposition Dashboard Fiori
CP Order Dashboard Fiori	CP Article Lookup Fiori	Recall Dashboard	Contact Lens Return					

**This guide outlines the steps and process for Inventory Management as well as:**

- Inventory Flow Overview
- Processing Shipment
- Cycle Counts
- Frame Recovery Overview
- Inventory Movement What If Guide
- Frame Transfer Overview
- Physical Inventory

Policy & Procedures regarding inventory movement is provided in the TeamVision Policy & Procedure Guide that can be found in Ciao! Toolkit Document Folder. It is the responsibility of all team members to know this policy and procedure and to comply fully. Team members are encouraged to seek guidance when a situation may be unclear. If a team member has any questions about this policy or is unsure of how to comply with the policy, please contact a manager. All presumed or actual violations or misuse must be reported to management. If it is determined that this policy has been violated, those involved may be subject to discipline up to and including termination of employment.

# INVENTORY FLOW OVERVIEW



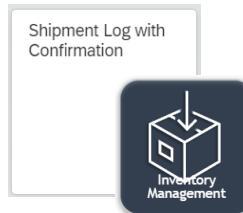
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Product will be **shipped** directly to your location.

2



3



**Tag Frames** using the **Zebra Frame Tag Printer** and place on board, shelves, to sell.

4



Visibility to incoming shipments from the Distribution Center and **take action** to confirm quantity received.  
**You MUST Confirm Inventory before advancing.**

5



Orders routed to Essilor **Insurance Lab**

Job Type	Inventory
Frame to Come (always FTC)	System will keep -1 because you are using the frame and need to be replenished.

6



**Dispense** – all orders in Order Tracker to ensure proper accounting and inventory movement.

OR



Orders routed within EssilorLuxottica Lab Network

LPA Job Type	Inventory
Complete Pair (RxO gives frame and lens)	System will give +1 because you will put the frame back on the board to sell again.
Frame to Come, Lenses Only (IOF)	System will keep -1 because you are using the frame and need to be replenished.
Product to Come, Finish Lenses (IOF)	Enter in the applicable UPCs and order in LPA as product to come.

## \*In-Office Finishing (IOF) Labs

If lenses are available within your on-site inventory, you will complete order in house by attaching UPC within Complete Order in LPA. The system will -1 for each UPC and your on-site inventory will be replenished.

### Note:

- Sites are assigned a segment that determines which products and quantities/facings you will sell
- Replenishment is automatic based on Ciao! Optical patient orders and you will receive Weekly or Biweekly replenishments

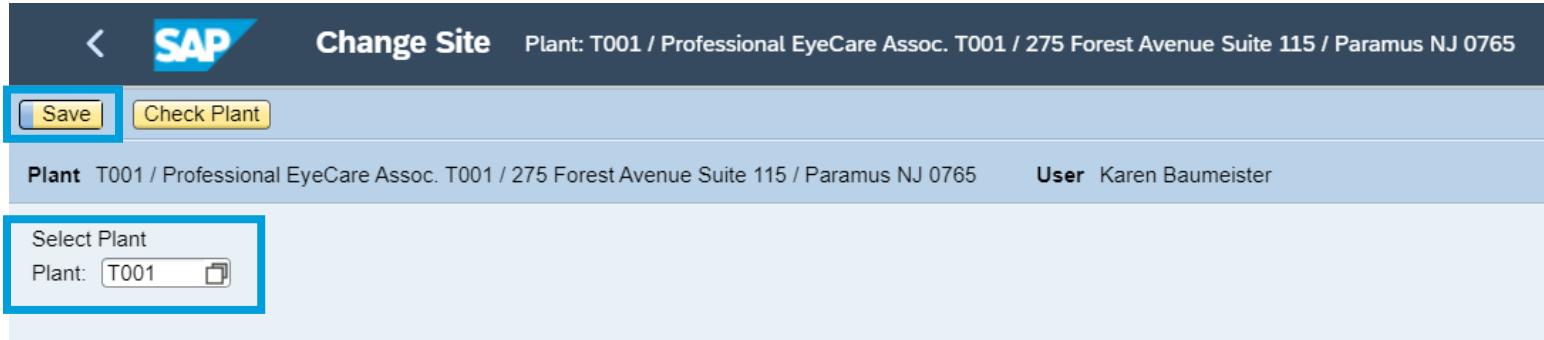
# CHANGE SITE



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For first time log in, you must complete **Change Site** to assign your location and perform any activities within Inventory Management. For team members working in multiple locations, you will **Change Site** to reflect your current location before completing any activities in Inventory Management.

Type in the **Plant Number** (site number) and **Save**:



Click **Refresh** icon  to see updated site information at the top of the application.

## Note:

- Prior to making inventory adjustments or ordering supplies, confirm the location is correct

# SHIPMENT LOG WITH CONFIRMATION



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## Confirm all shipments and quantities - take action if there are discrepancies:

- Select **Incoming Shipment** and appropriate range of dates then **Start Search**
- Locate the **Shipment Number** on the box and in the log
- Review the **Confirmation Quantity** number and physically count the number of units received (frames or stock lenses in all cartons)
- If it matches, no additional steps are required

Shipment Log with Confirmation									
Ship Date	Name	Ship.No	Ship.Note	Purch.Doc	Purch Qty	Ship. Qty	Conf. Qty		
05/29/2023	Luxottica NA Distribution AFS1	5044255007	8829396188	6010454679	18	18	18	<a href="#">Conf.Receipt</a>	<a href="#">Print Shipment</a>
05/28/2023	Luxottica NA Distribution AFS1	5044229685	8829304503	4538318266	1	1	1	<a href="#">Conf.Receipt</a>	<a href="#">Print Shipment</a>
05/26/2023	Luxottica NA Distribution AFS1	5044211960	8829246017	6010437961	16	16	16	<a href="#">Conf.Receipt</a>	<a href="#">Print Shipment</a>

**Discrepancies rarely occur and require action from the site.** Click into the desired shipment line in the Shipment Log to see the detail level (UPC, description, quantity).

## Discrepancies – missing product less:

- Missing **less than 5 units**, identify UP Cs and adjust the quantities when Confirming the Shipment
- Missing **more than 5 units**, contact your Regional Manager Asset Protection (RMAP) and Field Manager for direction
- If you already have Confirmed the Shipment, you must complete an **Inventory Adjustment** using **Shipping Error** for the reason code

Details										
Ship.No	Ship Line	UPC	Description		Merch. Cat Desc	Purch Qty	Ship. Qty	Ship Date	Ship.Note	Conf. Qty
5044255007	000001	888392561794	OX8032 HEX JECTOR, BLK MT, 57/17/141		Oakley	1	1	05/29/2023	8829396188	1
5044255007	000002	8056597535779	VE3303 , GRY SHN, 55/18/140		Versace	1	1	05/29/2023	8829396188	1
5044255007	000003	8056597589727	SF2601 , PNK SHN, 54/16/135		Sferoflex	1	1	05/29/2023	8829396188	1
5044255007	000004	8056597595728	BE2352 FOSTER, BLK SHN, 56/17/145		Burberry	1	1	05/29/2023	8829396188	1
5044255007	000006	8056597626309	PR 09YV , BLK SHN, 54/18/140		Prada	1	1	05/29/2023	8829396188	1

## Discrepancies – additional product received:

- If the brand is in your assortment, complete an **Inventory Adjustment** to add to stock and ticket the frames
- If brand is not in your assortment, contact your Field Manager

# PROCESSING SHIPMENT



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All shipments must be tagged before being placed on the optical floor (remember Shipment Confirmation must also be completed).

**Zebra Frame Tag Printer**



**Honeywell Scanner**



## To tag frames:

- On the Ciao! Optical stations connected to the Zebra printer, launch the frame tag printer application on the desktop (purple icon)
- Scan UPC on each frame box or bag
- Remove frame from the case and dispose of any trash
- Place the tag on the left temple – 1/3 from the temple end-piece, UPC inward/price out, tag secure



- Set aside any string kits, nose-pads, temples, etc. and place in a designated storage location
- Keep the branded cleaning cloths inside the empty frame cases and store for future use
- Place product on floor displays or neatly in each brands understock product

## Note:

- The Zebra Frame Tag Printer and Scanner is assigned to a single Ciao! workstation
- Call SSS for hardware or software issues (1-8333-467-4243)



**Cycle Counts** identify missing inventory which can be corrected through replenishment if an inventory adjustment is completed. **Only complete when prompted and at the days and times specified by TeamVision Operations or Asset Protection.**

## Cycle Counts:

- Counting of on-hand frames for a specific brand then comparing that count to what is posted in **Inventory Management System**

## Completing Cycle Counts:

- Print **Stock Summary** by selecting the desired brand and clicking on **Print Version** icon:

- You will now match against physical on-hand inventory (womens, mens, clear, sun, understock, display, hold, etc.) to determine which UPCs are missing
- Check all shipment boxes in the practice, frame recovery, patient holds, displays, etc.
- Check to ensure missing product is not in-route in **Shipment Log with Confirmation**

On-Hand Detail						
User	479536	Store	Northern Valley Eye Care T012	Date	Oct 5, 2023	
Product Type	Product Brand	EAN/UPC	Article Description	Sales Price	Total Qty	Unconfirm Qty
Frames	Burberry	8053672223453	BE1268, Blk Mat, 5/21/135		224	1
Frames	Burberry	8053672480507	BE1289, Blk Mat, 5/16/140		252	1
Frames	Burberry	8053672861143	BE1323, Blk, 5/18/145		293	1
Frames	Burberry	8056597526265	BE1344 BRUNEL, BLK MT, 5/5/145		293	1
Frames	Burberry	8056597526258	BE1344 BRUNEL, BLU MT, 5/5/145		293	1
Frames	Burberry	8056597218511	BE1348 ALBA, Sh Blk, 5/5/18/145		293	1
Frames	Burberry	8056597218542	BE1348 ALBA, Sh Brn, 5/5/18/145		293	1
Frames	Burberry	8056597423625	BE1355, Gld Cir, 5/21/140		293	1
Frames	Burberry	8056597423663	BE1355, Gld Red, 5/21/140		293	1
Frames	Burberry	8056597402577	BE1360 YORK, BLK MT, 5/12/145		293	1
Frames	Burberry	8056597402584	BE1360 YORK, BLU MT, 5/12/145		293	1
Frames	Burberry	8056597734158	BE1371 ANGELICA, BLK SHN, 5/21/140		321	1
Frames	Burberry	8056597734165	BE1371 ANGELICA, PNK SHN, 5/21/140		321	1
Frames	Burberry	8056597734134	BE1371 ANGELICA, BLV SHN, 5/21/140		321	1
Frames	Burberry	8056597733977	BE1372 MALCOLM, BLK MT, 5/7/18/150		293	1
Frames	Burberry	8056597733908	BE1372 MALCOLM, BLU MT, 5/5/18/145		293	1
Frames	Burberry	8056597733991	BE1372 MALCOLM, BRN MT, 5/7/18/150		293	1

Total Quantity 106      Total Unconfirm Quantity 0

- Notate missing UPCs on **Stock Summary** report then complete an **Inventory Adjustment** (see directions outlined in this guide and as directed by TeamVision Operations or Asset Protection)

- If no missing UPCs, no action required
- For missing UPCs and at the direction of TeamVision Operations or Asset Protection, adjust inventory using the Cycle Count reason code in **Inventory Adjustment**

## Note:

- Locations with Cartier Will complete frame counts daily using the required documents provided

# STOCK SUMMARY



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Use **Stock Summary** to look up a UPC or review inventory quantities for your location:

- Search by **Product Brand**
- Select the Brand to see **Merchandise Details**

The screenshot shows the SAP Stock Summary interface. On the left, a sidebar lists 'Product Brands (105)' with a search bar and a summary: 'Total Quantity: 1726', 'Total Unconfirmed Qty: 0', and 'Total In-store Qty: 1726'. It also shows details for 'Ralph' (Type: Frames, Mdse: 010510630) and 'Ray-Ban' (Type: Frames, Mdse: 010510645). The main area is titled 'Merchandise Detail' for 'Ray-Ban'. It shows 'Type: Frames', 'Total Quantity: 148', 'Unconfirmed Qty: 0', and 'Total In-store Qty: 148'. Below this is an 'Article Detail' section with 133 items. The table has columns: UPC, Sales Price, Total Quantity, and Unconfirmed Qty. The data is as follows:

UPC	Sales Price	Total Quantity	Unconfirmed Qty
805289291022 RAY-BAN RX 0RX5169-2034-54	167.00 USD	2 EA	0 EA
713132413678 RAY-BAN RX 0RX5268-5119-50	158.00 USD	2 EA	0 EA
8053672026733 RAY-BAN RX 0RX5268-5179-52	158.00 USD	1 EA	0 EA

## Note:

- If you see unconfirmed quantities, you need to take action in **Shipment Log with Confirmation** once product is received (shipments in route including replenishment, store to store transfers, etc. will show as unconfirmed)

# INVENTORY ADJUSTMENT



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Manually make **Inventory Adjustments** to add or remove frames, lenses, contact lenses, wellness, and accessories:

- Enter product **UPC**
- Select **Reason** by clicking within the reason box
- Enter **Quantity**
- Select **Add** to confirm the product details
- Add additional units as needed and select **Adjust** when completed

Inventory Adjustment

*UPC: 10164455202	OG210S, Blk Blk, 57/16/120	*Reason: Z001	Shipping Error - Remove Qty
*Quantity: 1		*Reason for Movement: 2300	Shipping Err (Store)
		Doc.Header Text: Enter Doc.Header Text...	
UPC	Quantity	Description	
	8053672285468	1	EA1027, Blk Mat, 55/18/140
<b>Adjust</b>		<b>Clear Table</b>	

## Note:

- All inventory adjustments needed due to returned, exchanged, or damaged product will be completed using **In-Store Damages**
- Business partners (Operations, AP, etc.) may provide direction on appropriate reasons codes for a particular situation

## INVENTORY ADJUSTMENT REASON CODES

Reason Code	Short Description	When To Use
Z001	Shipping Error - Remove Qty	To adjust product when quantities do not match shipment confirmation.
Z002	Shipping Error - Add Qty	
Z003	Mistag - Remove Qty	To adjust product that has been tagged incorrectly.
Z004	Mistag - Add Qty	
ZI22	Lens Inventory Correction - Add Qty	Only when directed by ROM.
ZI21	Lens Inventory Correction - Remove Qty	
Z007	Theft - Remove Qty	Only when directed by TeamVision Operations or Asset Protection.
Z008	Theft RTS - Add Qty	
ZI33	Cycle Count - Add Qty	Only when directed by TeamVision Operations or Asset Protection.
ZI32	Cycle Count - Remove Qty	

# FRAME RECOVERY OVERVIEW



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Frame  
Return/Exchange/EPP

+1 to inventory (added)  
– Ciao! Optical will  
auto-add every time –  
you have to take it out.

2



Will be listed on the **Returned Merchandise Report** from **Ciao Back Office > Sales Reports**. Print this report and look at the reason codes that indicate if it was a frame exchange/return (Restyle, Complete Pair EPP, etc.).

3



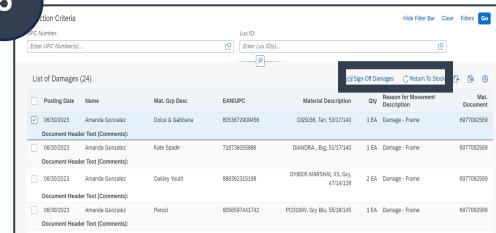
Find frame in **Frame Recovery** box (receipt should be wrapped around it). Confirm that it was indeed a frame exchange (*i.e., someone could have selected Frame Restyle reason code but only exchanged lenses in Ciao! Optical.*)

4

Damage Disposition  
Fiori

Go to Inventory Management and open DAMAGE DISPOSITION – look to see if someone already damaged it out.

5



## IS THE FRAME ON THE LIST IN DAMAGE DISPOSITION?

- **YES.** If it has Rx lenses, you will leave on Damage Disposition for final removal (last step of the full process). This means someone already damaged it in **Inventory Management**.
  - **YES.** If Frame Only including Plano Sun, evaluate frame and if you can resell it, find the frame on the list and click **RETURN TO STOCK** (top right of page). Clean up, tag and place in dispensary. If you can't resell, leave on Damage Disposition for final removal (last step of the full process).
  - **NO NOT ON LIST.** If it has Rx lenses, you will need to **DAMAGE** out first in **Inventory Management**, so it gets on the Damage Disposition list.
  - **NO NOT ON LIST.** If Frame Only including Plano Sun, evaluate frame and if you can resell it, **NO ACTION NEEDED** in **Inventory Management** (since it is systemically already to stock – happened in Ciao! Optical when you returned it). If you can't resell it, you need to go to **Inventory Management** and **DAMAGE** out to get the product on the Damage Disposition list.

# FRAME RECOVERY OVERVIEW



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**Work the list first. Then work the box.** For all the reason codes that have Frame exchange reason code – should see the frame in the box. Ideally there is a 1 to 1 match (means everyone did everything right).

If that's not the case – here's how to handle. This part will include discovery and understanding how frame inventory moves. If you do the process right, you won't have to deal with this.

SCENARIO	WHAT IT MEANS & WHAT TO DO
Frame in Box BUT NOT on Returned Merchandise Report	Means something wasn't processed in Ciao! Optical OR could be just a damaged/defective product that just needs to be damaged in Inventory Management first. You will need to research if there was inventory movement and you either need to damage, return to stock, or take no action.
Frame on Returned Merchandise Report BUT NOT in box	Patient may be wearing frame (which is okay).  Or it's missing. You will need to figure out which it is.  If patient wearing frame, I would reprint the tray ticket from the exchange and write PATIENT WEARING FRAME and place in box, so you have don't' must look again next time. When the patient drops the frame (wrap that tray ticket around it and pace in box).  If it's missing, this will be shrink, and impact your site's inventory. You will either RETURN TO STOCK or DAMAGE DISPOSITION it out – either option will impact you. You will need to coach staff on the process.
Frame is on Damage Disposition list BUT NOT in the box or on Returned Merchandise Report	Means someone damaged product in Inventory Management but didn't place the product in the box. You will need to research what happened and locate the frame. If you find it – action accordingly. If you can't find it, this will be shrink, and impact your site's inventory. You will either RETURN TO STOCK or DAMAGE DISPOSITION it out – either option will impact you. You will need to coach staff on the process.

7



**Once you've worked the list and the box, you will go back and check the other line items on the Returned Merchandise Report** to ensure that in Ciao! Optical – they didn't select a Complete Pair or Frame Only exchange (basically – you are checking that the lens return/exchange was systematically processed correctly in Ciao! Optical. Basically – look up the history and see how the processed. If it was a lens only exchange reason code on the report but you see a Complete Pair exchange in the history – you need to adjust inventory since frame inventory had movement.

# FRAME RECOVERY



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How to best manage your Frame Recovery Box by designate a box or a spot that is clearly marked FRAME RECOVERY. Coach staff that ALL RETURNED/EXCHANGED/DAMAGED product needs to go in this box or spot AND a receipt or confirmation of inventory movement (i.e., broken product damaged in MIM/Fiori) is wrapped around the product.

- All frame returns/exchanges/EPP redemptions should be processed in Ciao! Optical and have the receipt wrapped around it in the box
- If patient is wearing frame till new product comes in – make a copy of the tray ticket of the original product (what you will collect) and a receipt of the exchange (to know it was done) and write Patient Wearing Frame
- If product is just damaged – enter damage in **Inventory Management** and wrap the inventory movement confirmation around the product and place in box

WHEN	ACTION NEEDED
DAILY	Add any returns, exchanges, and EPP redemptions into the <b>Frame Recovery Box</b> with a copy of the <b>Ciao! receipt</b> around the frame or product.
WEEKLY	Take the <b>Frame Recover Box</b> and complete the proper action in <b>Inventory Management</b> to <b>Damage</b> (or Return To Stock if sellable) following the <b>Inventory Movement What If Guide</b> .
	Wrap the <b>Damage Paperwork</b> around the frame and place in your <b>Frame Recovery Box</b> .
	Review <b>Returned Merchandise Report</b> to confirm all products have been damaged out and are in <b>Frame Recovery Box</b> (follow up on any missing items).
MONTHLY	The Manager and a witness will reconcile in <b>Inventory Management</b> using the <b>Frame Recovery Box</b> and complete the <b>Damage Disposition</b> (for all signed-off damages).
	Print two copies of the <b>Damage Disposition Paperwork</b> – keep one in a file within in your office and place the second copy with your damages to include with shipment.
	Ship frames to NAASC (NAASC only accepts frames, and any other products should be destroyed and disposed of (accessories, wellness, etc.)).

# IN-STORE DAMAGES



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## Go to Inventory Management and select In-Store Damages:

- Select the damage reason by clicking the icon - full list of reason codes to select on next page
- Enter frame **UPC** and **Quantity**
- Select the **Add** button
- Add any additional UPCs the select **Adjust**

In-Store Damages

Header Data

Document Header Text (Comments):

\*Reason:  Damage - Frame

Reason for Movement:  Damage - Frames

Item Details

**Add** Reset fields

\*UPC:  HC8132, Prp, Prp Grd

Quantity:

### Note:

- This is the first step that is either done for just damaged product found in your site or during the reconciliation process when you are matching product on the **Returned Merchandise List** and the **Frame Recovery Box**
- All frames on the **Damage Disposition List** have already been damaged out

## IN-STORE DAMAGES REASON CODES

Reason Code	Short Description	When To Use
Z189	Damage – Return (Not Protection Plan)	Damage of any product (frame, lens, accessory, contact lenses) NOT covered under EPP due to customer return/exchange.
Z187	Damage – Return (Protection Plan)	Damage of any product (frame, lens, accessory) that is covered under EPP due to a customer return/exchange.
Z126	In-Store Damage (non return/exchange)	Any product (frame, lens, accessory, contact, readers) that needs to be damaged not related to a customer return/exchange.
Z175	Damage Lab Manufacturing	Frame damaged anytime during the manufacturing process.
Z015	Damage – Calibration Lens	Only when directed by ROM related to equipment calibration (standard calibrations lenses available in CP).
Z134	Damage-Expired Products -Remove Qty	For expired product that requires in-store disposal (contact lens, wellness, etc.).
Z191	Return to Stock – Not Damaged	The reversal of any product that was damaged and should not have been.
Z125	Manufacturer Defect	Any product (frame, lens, accessory, contact, readers) that needs to be damaged due to manufacturers defect found in store.

# INVENTORY MOVEMENT

## WHAT IF GUIDE



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PRODUCT	WHAT IF	ACTION	TEAM MEMBER ACTION
FRAMES	Patient Return or Exchange with Manufactured Lenses	Damage using In-Store Damages	Place frame in Frame Recovery with Damage paperwork wrapped around it.
	Patient Return or Exchange Plano Frame	Sellable, No Action Needed in Inventory Management	Clean frame, add tag, and add to frame board or understock.
	Patient Return or Exchange Plano Frame	If not sellable, Dame out using In-Store Damages	Place frame in Frame Recovery with Damage paperwork wrapped around it.
	Team Member or Patient Damages Saleable Product	Damage using In-Store Damages	Place frame in Frame Recovery with Damage paperwork wrapped around it.
LENS	Patient Return or Exchanges Lenses	No Action Needed in Inventory Management	Dispose of lenses.
ACCESSORIES AND WELLNESS	Patient Return Accessories or Wellness	Damage using In-Store Damages	Dispose of products.
	Team Member or Patient Damages Saleable Product	Damage using In-Store Damages	Dispose of products.
CONTACT LENSES	Patient Returns or Exchanges un-opened (not expired) Contact Lenses	No Action Needed in Inventory Management - place in Contact Lens Return/ Recall Box	Do not resell. Hold for Contact Lens Return. These are sitting in your inventory (which is how we know to recall them).
	Patient Returns or Exchanges opened or expired Contact Lenses	Damage using In-Store Damages & Dispose	Open any remaining contacts lens outer package and blisters. Empty the contact lens and solution into the garbage can with packaging.
	Team Member or Patient Damages Saleable Product	Damage using In-Store Damages	Dispose of products.
LAB	In-Lab Breakage with stock lens or RxO lenses	No Action Needed in Inventory Management	Process and reorder as Breakage in LPA.
	In-Lab Frame Breakage on an RxO Lab Order	Damage using In-Store Damages	Order or process replacement frame in Ciao! Optical within the patient profile. Place broken frame in Frame Recovery with Damage paperwork wrapped around it.
	In-Lab Breakage with Finished Single Vision Lenses (stock lenses)	No Action Needed in Inventory Management	Process as Breakage in LPA.
	Duplicate Order from RxO	Damage using In-Store Damages	Place frame in Frame Recovery with Damage paperwork wrapped around it.

# DAMAGE DISPOSITION



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1. Print the **Returned Merchandise Report** from **Ciao Back Office > Sales Reports** and match each frame from the list to a frame in the **Frame Recovery Box**. Look at **Reason Descriptions** for each listed and mark those that reference a frame (Restyle Frame, Complete Pair EPP, etc.).
2. Then look in **Damage Disposition** in Inventory Management and physical cross these frame off the returned merchandise report:

Returned Merchandise Report								
Date Range: 12/01/2020 - 12/30/2020					Employee: All			
Minimum Amt: \$0.00					Reason: ALL		Sort Order: Date & Time Ascending	
Trans. ID	Reg.ID	Date & Time	Comm. Assoc.	Ring Associate	Item # & Description		Qty	Amount
1072123	1	12/03/20 1:10 PM	745173	757680	20500000348897 - Standard AR Add S15		1.00	\$36.13
1072123	1	12/03/20 1:10 PM	745173	757680	20500000354263 - PG AVP Transitions GEN 8 Grey (Poly)		1.00	\$347.85
1072126	1	12/03/20 6:49 PM	758982	758982	20500001124049 - SV Oakley Essential 150 Clear		1.00	\$138.67
1072130	1	12/03/20 6:57 PM	436934	436934	20500000355208 - PG AVP Fea Classic Prem AR (Poly)		1.00	\$212.67
4013637	4	12/04/20 11:05 AM	038163	039371	20500000355208 - PG AVP Fea Classic Prem AR (Poly)		1.00	\$412.01
1072150	1	12/04/20 12:15 PM	758982	758982	20500000673036 - PG AVP Fea Classic Blue IQ Clear Prem AR		1.00	\$359.08
1072157	1	12/04/20 5:09 PM	748190	758982	8053672517521 - AX1018, Blk Mat. 5A/17/140		1.00	\$31.66
1072157	1	12/04/20 5:09 PM	748190	758982	20500000671995 - SV Fea Classic Blue IQ Clear Prem AR		1.00	\$97.34
1072189	1	12/05/20 2:38 PM	436934	038163	20500000673036 - PG AVP Fea Classic Blue IQ Clear Prem AR		1.00	\$359.01
1072194	1	12/05/20 5:15 PM	757680	038163	20500000357738 - SV Featherwates Classic (Poly)		1.00	\$60.00
1072194	1	12/05/20 5:15 PM	757680	038163	10164542506 - OG 2205M, Blk Clr. 55/15/130		1.00	\$45.00

Damage Disposition

Fiori

Selection Criteria

UPC Number:  Lux ID:

[Hide Filter Bar](#) [Clear](#) [Filters](#) [Go](#)

List of Damages (24)

<input type="checkbox"/> Posting Date	Name	Mat. Grp Desc	EAN/UPC	Material Description	Qty	Reason for Movement Description	Mat. Document
<input checked="" type="checkbox"/> 06/30/2023	Amanda Gonzalez	Dolce & Gabbana	8053672909456	DG5036, Tan, 53/17/140	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):							
<input type="checkbox"/> 06/30/2023	Amanda Gonzalez	Kate Spade	716736055886	DIANDRA., Brg, 51/17/140	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):							
<input type="checkbox"/> 06/30/2023	Amanda Gonzalez	Oakley Youth	888392315199	OY8005 MARSHAL XS, Gry, 47/14/128	2 EA	Damage - Frame	6977092569
Document Header Text (Comments):							
<input type="checkbox"/> 06/30/2023	Amanda Gonzalez	Persol	8056597441742	PO3189V, Gry Blu, 55/18/145	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):							

[Sign-Off Damages](#) [Return To Stock](#)

# DAMAGE DISPOSITION



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**3. Once you have taken all the steps matching up list to frames in the box to frames listed on Damage Disposition, you will complete the final step which is To Sign Off Damages:**

- Select all the items by check marking the box on the left. **Note everything on this list SHOULD BE REMOVED FROM INVENTORY**
- Click **Sign Off Damages**
- Print two copies of the **Disposition Paperwork, Sign**, and retain one copy for your record and include the second with your shipment to NAASC

Selection Criteria

UPC Number:  Lux ID:  Hide Filter Bar Clear Filters Go

List of Damages (24)								
<input type="checkbox"/>	Posting Date	Name	Mat. Grp Desc	EAN/UPC	Material Description	Qty	Reason for Movement Description	Mat. Document
<input checked="" type="checkbox"/>	06/30/2023	Amanda Gonzalez	Dolce & Gabbana	8053672909456	DG5036, Tan, 53/17/140	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):								
<input type="checkbox"/>	06/30/2023	Amanda Gonzalez	Kate Spade	716736055886	DIANDRA., Brg, 51/17/140	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):								
<input type="checkbox"/>	06/30/2023	Amanda Gonzalez	Oakley Youth	888392315199	OY8005 MARSHAL XS, Gry, 47/14/128	2 EA	Damage - Frame	6977092569
Document Header Text (Comments):								
<input type="checkbox"/>	06/30/2023	Amanda Gonzalez	Persol	8056597441742	PO3189V, Gry Blu, 55/18/145	1 EA	Damage - Frame	6977092569
Document Header Text (Comments):								

Sign-Off Damages Return To Stock Print Print All Print Selection

Remember – returning to stock should have already happened when assessing each frame from box and list – if returning to stock, you will do this here PRIOR to final SIGN OFF DAMAGES.

## 4. Ship to NAASC:

- Only ship eyewear that has been **Signed Off** in the **Damage Disposition**
- NAASC only accepts frames, and any other products should be destroyed and disposed of (accessories, wellness, etc.)
- No frame preparation is required, leave lenses in frame if present
- **Practice Manager and a witness are required to physically count the damages, match to Damage Disposition paperwork, and observe the box being sealed**
- If instructed to ship Rx lenses or contacts, do not ship commodities together
- Prepare the shipping label and write the **Tracking Number** on Damage Disposition paperwork
- Write **TeamVision Damages** on the outside of the box and ship **Ground**:

US	CAN
Luxottica NAASC Damages 101 Greenwood Industrial Pkwy Suite 383 McDonough, GA 30253	Luxottica After Sales Canada Damage Department 2670 Rue Diab St-Laurent QC H4S1E8

# DAMAGE DISPOSITION DASHBOARD



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5. Check the **Damage Disposition Dashboard** which simply shows what you've already done – a list of completed damages that have been keyed in the Damages Disposition process. This is just a checkpoint to validate what you have already Damaged Disposition and signed off on (i.e. mailed to NAASC).

- Enter a **Posting Date Range** (default is one month prior to the current date)
- Search by Posting Date, UPC number, or Team Member ID
- Re-print damage paperwork by selecting the radio button on the left and the **Print Article Doc PDF**

## Selection Criteria

\*Posting Date:  UPC Number:

Lux ID:

## Damages List (14)

	Posting Date	Name	MDSE Category Description	EAN/UPC	Mat. Description	Qty	Reason for Movement Description	Mat. Document
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Ray-Ban	8053672862553	RX5362, Tr Cir, 54/17/140	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Oakley	888392221605	OX5113 LIZARD, Blk Mat, 56/18/135	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Oakley Youth	888392374172	OV8007, Blk Clr, 48/14/128	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Ray-Ban	805289526612	RB4165, Gry, Stv Mir	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Oliver Peoples	827934468658	OV5298SU FINLEY ESQ. SUN (U), GRY SHN, G	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Tory Burch	725125947633	TY2031, Trt Blu, 49/17/135	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	CELINE	192337066986	CL000302, Blk Shn, 51/20/145	-1	Damage - Removed from Inventory	6991498330
<input type="radio"/>	09/07/2023	Amanda Gonzalez	Gucci	889652047657	GC001085 GG00110 RI K SHN 55/17/145	-1	Damage - Removed from Inventory	6991498330

Print Article Doc PDF

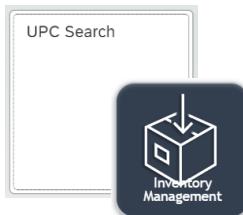
# FRAME TRANSFER OVERVIEW



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There maybe cases that require a **Frame Transfer** from another location for a patient. This should be used when no other solutions can be determined and with **Field Manager approval**.

1



Use **UPC Search** to search within the **Market**. Call the location to confirm availability.

2



**Email your Field Manager** for approval, include the location sending the frame.

3



Location sending the frame will create a **Store to Store Transfer**.

4



**Print 2 copies of the paperwork** (sign, include in outgoing shipment and keep the other for your records). Include branded case, ship using Easyship.

5



Receiving location will confirm shipment in **Shipment Log with Confirmation**.

6



**Sign the paperwork and keep for your records.**

## Note:

Use **Ciao! Optical Customer Order to Special Order a frame** directly from the Distribution Center when the frame is available:

- Select **Frame not in store** (not in location) or **Frame in store, Special Order** (frame in store but patient requests new frame) on Frame tab in Customer Order
- Click the **Arrow** to proceed with the order
- You will receive red error message if the frame is not available
- If you do not receive the error message, you can proceed forward to ordering
- On your Order Worksheet you will see the **Truck** icon indicating the frame has been special ordered (frame to come)
- Once product is received, **Confirm Receipt in Order Tracker** in Frame To Come tab



There maybe cases when you need to locate a frame in another location for a frame transfer or at a patients request:

- Enter frame **UPC**
- Select **Brand** (should always be TeamVision)
- Select **State(s)** or search by **Store**
- Select **Search** and the list will populate with sites that have **on-hands** for the frame UPC

**Search Criteria**

**Product Search Options**

UPC:

Description:

Product Type:

Quantity > 0

**Store Search Options**

Brand:

State:

Store:

**Search Results**

Items (1)											
EAN/UPC	Mds.Category	Description	Qty	Unconf. Qty	Price	Store	Location	Telephone	City	State	Postal Code
8053672399127	Ray-Ban	RB2132 55 NEW WAYFARER, Blk Blk, Grn 3	1	0	140.00	T012	Northern Valley Eye Care	201-767-7988	Closter	NJ	07624-2616

# CREATE STORE TO STORE TRANSFER



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There maybe cases when you need to transfer a frame to another location for patient satisfaction or when directed by TeamVision Operations & Product teams.

**Patient Store To Store Transfers are not permitted for any reason without Field Manager approval** and are reserved for unique patient situations (when no other solution can be determined):

- Complete a **UPC Search** in Fiori to locate frame within your market and/or state
- **Call the site** to confirm they have the frame and ask to hold while you gain approval
- **Email your Field Manager** with the request including patient need along with the details of the frame (cc the site that you have confirmed frame availability)

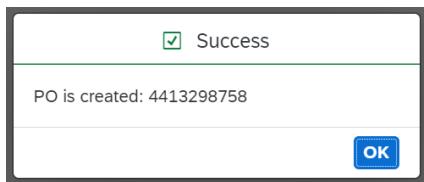
## Complete the Transfer:

- The site providing the frame will complete the **Store To Store Transfer** in Inventory Management
- Enter the **Receiving Store**, patient's name in the **Document Header Text** box, **UPC** and **Quantity**

Store to Store Transfer

Store to Store Transfer				
Receiving Store		Doc.Header Text		
Receiving Store	UPC	Patient Name		
T035	Enter UPC...			
UPC				
Patient Name				
Quantity				
<input type="text" value="1"/>				
<b>Add</b>				
Product Details				
Product	UPC	On-hand Qty	Quantity	Description
	8053672285468	1	1	EA1027, Blk Mat, 55/18/140
<b>Create Transfer</b>		<b>Clear All Table Entries</b>		

- Select **Add** and **Create Transfer** to create a PO

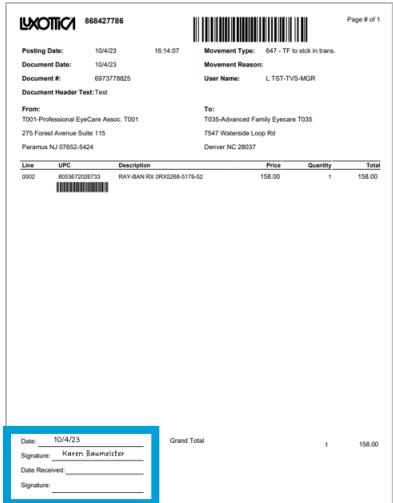


# CREATE STORE TO STORE TRANSFER



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- Print 2 copies of the **paperwork**, keep one for your record (12 months) and **Sign** the other and include in the box for the receiving location



- Pack the frame, branded case, and **Signed paperwork** and ship using Easyship, include the PO number if prompted in the system
- The receiving location will see the transfer in the **Shipping Confirmation Log with Confirmation** in Inventory Management system and **Confirm Shipment**
- Receiving location will **Sign** the paperwork and keep it for their record (12 months)

To reprint the paperwork, go to **Shipment Log with Confirmation**

- Select **Outgoing Shipment** and desired **Date Range**

Shipment Log with Confirmation

Selection Criteria

Incoming Shipment  
 Outgoing Shipment

Post/Issue Date:	09/05/2023 <input type="button" value="Calendar"/>	To	09/12/2023 <input type="button" value="Calendar"/>
Shipment Number:	Shipment Number <input type="button" value="→"/>	To	Shipment Number <input type="button" value="→"/>
Shipment Note:	Shipment Note <input type="button" value="→"/>	To	Shipment Note <input type="button" value="→"/>
Purchase Order:	Purchase Order <input type="button" value="→"/>	To	Purchase Order <input type="button" value="→"/>
Site:	Site <input type="button" value="→"/>	To	Site <input type="button" value="→"/>
UPC:	UPC <input type="button" value="→"/>	To	UPC <input type="button" value="→"/>
Fiscal Period:	<input type="button" value="▼"/>		
Fiscal Year:	<input type="button" value="▼"/>		

**Start Search**

Sort Settings

Ship Date	Name	Ship.No	Ship.Note	Purch.Doc	Purch Qty	Ship. Qty	Conf. Qty	<input type="button" value="Print Shipment"/>	<input type="button" value=""/> >
09/11/2023	Advanced Family Eyecare T035	6973777928	0868427514	4413298758	1	1	1	<input type="button" value="Print Shipment"/>	<input type="button" value=""/> >
09/11/2023	Cooper Eye Care T002	6973777923	0868427500	4413298749	2	2	2	<input type="button" value="Print Shipment"/>	<input type="button" value=""/> >
09/11/2023	Cliffside Park Eye Associates	6973777974	0868427499	4413298748	1	1	1	<input type="button" value="Print Shipment"/>	<input type="button" value=""/> >



**Recalls are scheduled when there is a need to pull back product. Use the Recall Dashboard to key recalls during the designed date range. Recalls will be prompted from and communicated to sites by Operations or Product teams.**

- All frames must be thoroughly inspected for damage prior to keying. Any frame determined to be damaged must be damaged out in **Inventory Management** located in the CIAO! Toolkit and must not be shipped back to the NAASC under any circumstances. Any item that is determined to be damaged upon arrival to the NAASC will be damaged out and attributed to the store.
- Recalls must be completed within the timeframe communicated, then keyed and submitted in **Inventory Management**. The store must always prioritize following the **Quantity to Keep** column in the **Recall Worksheet** before all other columns to ensure accuracy. Once the communicated timeframe has passed, recalls can no longer be completed. If the recall was not entered into **Inventory Management** during the available timeframe, any frames pulled cannot be shipped out under any circumstances and must be returned to the sales floor or backstock.
- Prior to shipping, all frames must be accompanied with their correct case. If the correct case cannot be located, the frame must be placed in a polybag. All recall boxes must be packed neatly to ensure damage does not occur during transit. Never include frames that cannot be keyed in **Inventory Management** and / or are not part of the recall.
- Once processed, frame recall boxes must be shipped out immediately, utilizing **Easyship (US)** and **ICS Courier (CAN)** in the CIAO! Toolkit for label creation.
- The NAASC will process all frame recalls within a four-month timeline. Store Managers must check **Inventory Management** to ensure receipt of the recall shows in the system. If the timeline provided has lapsed and receipt of the recall still does not show, please email TeamVision Ops.

#### **Team Member Action**

- Assist in pulling / recording affected frames and correlating cases

#### **Practice Manager Action**

- Ensure processing is completed in compliance with provided policy and process details
- Ensure the recall shows as received by the NAASC in **Inventory Management**

#### **Field Leader Action**

- Ensure Practice Managers understand full frame recall details
- Ensure frame recalls are completed accurately and on time by utilizing provided compliance reporting or reviewing in the **Inventory Management** system

# RECALL DASHBOARD



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## To Complete a Recall:

- Active recalls will be listed on the **Open Recalls**

[Open Recalls \(1\)](#)

Search only by Recall Number

4538706398	Qty Requested: 13
Start Date: 09/08/2023	End Date: 09/22/2023
Desc: FIORI Test recall Team Vision	

**4538706398** Details

Quantity Requested: 13

Desc: FIORI Test recall Team Vision Start Date: 09/08/2023 End Date: 09/22/2023

**Items(13)** Total Keyed Qty: 12

Vendor	Mdse Cat Desc	Material Desc	UPC	Quantity	UOM	Keyed Qty
LUXOTTICA GROUP SPA	Polo Prep	PP8036, Blk Red, 46/15/125	8053672412796	1	EA	1
LUXOTTICA GROUP SPA	Polo Prep	PP8036, Blu Mat, 46/15/125	8056597004084	1	EA	1
LUXOTTICA GROUP SPA	Polo Prep	PP8036, Blu, 46/15/125	8053672412758	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8518 , BLU SHN, 46/15/125	8056597558624	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8518, Blk, 46/15/125	713132451267	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8518, Trt, 46/15/125	713132451243	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8526, Prp, 47/17/130	8053672570540	1	EA	
Luxottica NA Distribution AFS1	Polo Prep	PP8526, Trt, 47/17/130	8053672570526	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8542, Prp Shn, 48/16/130	8056597421591	1	EA	1
Luxottica NA Distribution AFS1	Polo Prep	PP8542, Red Shn, 48/16/130	8056597421577	1	EA	1

[Print All](#) [Print PDF](#)

[Open](#) [Closed](#) [Submit](#) [Save](#) [Recall Worksheet](#)

- To print a PDF version of the Recall Worksheet, click on **Recall Worksheet** and open the PDF

**Team Vision Team Vision**  
Recall Worksheet

Recall 4538706865 Team Vision Test recall FIORI

Team Vision Test recall FIORI Worksheet Print Date 10/04/2023

From To

Recall From: 4538706865 Team Vision Test recall FIORI Worksheet Print Date: 10/04/2023  
T001 Professional EyeCare Assoc. To: 900195 Luxottica NAASC, Suite 395  
Professional EyeCare Associate 101 Greenwood Industrial Pkwy  
275 Forest Avenue Suite 115 McDonough, GA 30253  
Paramus, NJ 07652-5424

**Please Complete and Return this List with Product:**

Return Quantity	Actual Quantity to Return
2	
2	
2	
2	
2	
4	
2	
2	
1	
2	

**Instructions**  
After you receive label and recall ticket to read box. Write store number and recall number on the outside of each box with permanent marker, and ship by the due date indicated in the recall instructions or Not Specified.  
WHEN KEYED RECALL, ENTER RECALL NUMBER: 4538706865

**Key**  
Quantity to Keep  
Return Quantity = System On Hand Quantity - Quantity to Keep  
Actual Return Quantity: Quantity physically shipping in the box

Date Keyed: \_\_\_\_\_

# Boxes Sent: \_\_\_\_\_

Tracking #s: \_\_\_\_\_

Total Quantity: \_\_\_\_\_

Manager Approval: \_\_\_\_\_

Date: \_\_\_\_\_

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# RECALL DASHBOARD



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- The **Quantity to Keep** column values must **always** be prioritized first
  - Example:** The store's **Quantity to Keep** column shows 3, the **Return Quantity** shows 4, and the store locates 4 units of the UPC in-store. The store must prioritize the **Quantity to Keep** column which says they must keep 3, therefore the store should only send 1 of this UPC
- Use the **Recall Worksheet** to pull and mark the quantity to return
- Find the brand case for each recall frame you will return, put the frame inside, and set aside
- Continue this process until all frames are found and you are ready to **Key the Recall into the Inventory Management system**

Team Vision Team Vision Recall Worksheet							
Recall	4538706865	Team Vision Test recall FIORI					
From	T001	Professional EyeCare Assoc. T0					
To	Luxottica NAASC, Suite 395						
Merch Cat Desc	EAN/UPC	Description			Quantity to Keep	Return Quantity (On-hand Qty - Qty to Keep)	Actual Quantity to Return
Ophthalmic Adult/Oakley	888392546364	OX8173, Blk Tan, 55/16/141			1	2	_____
		Mdse Total			1	2	_____
Ophthalmic Adult/Prada	8056597437882	PR 14WV, Gry, 56/18/150			1	2	_____
		Mdse Total			1	2	_____
Ophthalmic Adult/Ray-Ban	8056597364256	RX5395, Blk Blk, 49/18/140			0	2	_____
	8056597360067	RX7185, Gry Blk, 52/18/145			1	2	_____
		Mdse Total			1	4	_____
Ophthalmic Safety/GAF	193033069059	GRXS14, Blk Shn, 57/12/122			1	2	_____
		Mdse Total			1	2	_____
Sunglasses Adult/Ray-Ban	805289626541	RAY-BAN SOLAR 0RB2016-W2578-59			1	1	_____
	8056597377492	RB2016, Blk Mat, Blu			0	1	_____
		Mdse Total			1	2	_____
Recall #: 4538706865			Store #	T001	Recall Total	12	

- Enter the quantity in the **Keyed Quantity Box** when keying into Inventory Management system
- Ensure you physically collect all on-site inventory (holds, displays, etc.)
- Save** will save but another step needs to be taken to submit the recall in the system
- Once all quantities have been entered and the recall has been determined to be fully accurate, click **Submit** Once Submit is selected, no changes can be made to the recall and the recall will no longer show in the **Open Recall** section

## Note:

- On hand quantities can vary based on when the Recall was entered into Inventory Management and patient sales prior to completing the Recall
- Prioritize Quantity to Keep from the Inventory Worksheet and only return the quantity being requested if you have on hand (never additional)
- You cannot take your inventory negative with a recall. If you are trying to recall more than what Fiori thinks you own, you will get an error. Key in and ship back only the number of units the system thinks you have. The other units should be returned to the frame board. These will be captured in the next available recall after your inventory has been reconciled and updated to account for those units.

# RECALL DASHBOARD



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- Print the completed **Recall Worksheet**, **Sign**, and retain one copy for your record and **include a copy in every box** that is being shipped containing the recalled frames to NAASC

LUXOTTICA

Posting Date: 9/13/23 14:16:09 Movement Type: 344 - TR blocked to univ.

Document Date: 9/13/23 Movement Reason: 1203 - Recall Keyed

Document #: 693778052 User Name: L.TST-TVS4MGR

Return Authorization: 4538709398 Recall Keyed

From: T001-Professional EyeCare Assoc. 1001  
275 Forest Avenue Suite 115  
Paramus NJ 07652-5424

To: 900195-Luxottica NAASC, Suite 395  
101 Greenwood Industrial Pkwy  
McDonough GA 30253

Line	UPC	Description	Price	Quantity	Total
0000	850572412796	PPB036, Blk Red, 48/15/125	102.00	-1	102.00
0004	850572412800	PPB036, Blk Mat, 48/15/125	102.00	-1	102.00
0005	850572412718	PPB036, Blk, 48/15/125	102.00	-1	102.00
0008	850572412583	PPB018, BLU SHN, 48/15/125	102.00	-1	102.00
0010	731134512877	PPB018, Blk, 48/15/125	102.00	-1	102.00
0012	731134512433	PPB018, Tr, 48/15/125	102.00	-1	102.00
0014	850572412826	PPB026, Tr, 41/17/130	102.00	-1	102.00
0016	850572412591	PPB42, Prp Shn, 48/16/130	102.00	-1	102.00
0018	850572412577	PPB42, Red Shn, 48/16/130	102.00	-1	102.00
0020	850572412572	PPB542, RED SHN, 47/18/130	91.00	-1	91.00
0022	850572412574	PPB542, BLK SHN, 48/16/130	91.00	-1	91.00
0024	850572412575	PPB542, BLU SHN, 48/16/130	91.00	-1	91.00

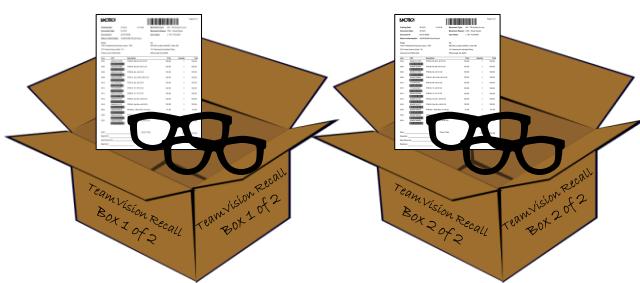
Date: \_\_\_\_\_ Grand Total: -12 1191.00-

Signature: \_\_\_\_\_  
Date Received: \_\_\_\_\_  
Signature: \_\_\_\_\_

- Frames must be packed neatly to reduce potential damages occurring in transit, then shipped out immediately
- Prepare the shipping label utilizing **Easyship (US)** or **ICS Courier (CAN)** for label creation:

US	CAN
Luxottica NAASC Retail Eyewear Returns 101 Greenwood Industrial Pkwy Suite 395 McDonough, GA 30253	Luxottica After Sales Canada Recall Department 2670 rue Diab Saint-Laurent, QC H4S1E8

- Write the **Tracking Number(s)** on your copy of the **Recall Worksheet** and retain for 12 months
- Write **TeamVision Recall** on the outside of the box(s) and mark number of boxes if applicable
  - Box 1 of 2, Box 2 of 2, etc.



Write TeamVision Recall on each box and box count

LUXOTTICA

Posting Date: 9/13/23 14:16:09 Movement Type: 344 - TR blocked to univ.

Document Date: 9/13/23 Movement Reason: 1203 - Recall Keyed

Document #: 693778052 User Name: L.TST-TVS4MGR

Return Authorization: 4538709398 Recall Keyed

From: T001-Professional EyeCare Assoc. 1001  
275 Forest Avenue Suite 115  
Paramus NJ 07652-5424

To: 900195-Luxottica NAASC, Suite 395  
101 Greenwood Industrial Pkwy  
McDonough GA 30253

Line	UPC	Description	Price	Quantity	Total
0000	850572412796	PPB036, Blk Red, 48/15/125	102.00	-1	102.00
0004	850572412800	PPB036, Blk Mat, 48/15/125	102.00	-1	102.00
0005	850572412718	PPB036, Blk, 48/15/125	102.00	-1	102.00
0008	850572412583	PPB018, BLU SHN, 48/15/125	102.00	-1	102.00
0010	731134512877	PPB018, Blk, 48/15/125	102.00	-1	102.00
0012	731134512433	PPB018, Tr, 48/15/125	102.00	-1	102.00
0014	850572412826	PPB026, Tr, 41/17/130	102.00	-1	102.00
0016	850572412591	PPB42, Prp Shn, 48/16/130	102.00	-1	102.00
0018	850572412577	PPB42, Red Shn, 48/16/130	102.00	-1	102.00
0020	850572412572	PPB542, RED SHN, 47/18/130	91.00	-1	91.00
0022	850572412574	PPB542, BLK SHN, 48/16/130	91.00	-1	91.00
0024	850572412575	PPB542, BLU SHN, 48/16/130	91.00	-1	91.00

Date: \_\_\_\_\_ Grand Total: -12 1191.00-

Signature: **Tracking #123456**  
Date Received: \_\_\_\_\_  
Signature: \_\_\_\_\_

Record tracking numbers and retain paperwork for 12 months

# CONTACT LENS RETURN

## Premium Vision – Canada



RETURN TO TABLE  
OF CONTENTS

**Contact Lens Returns must be completed during specific times of the year to ensure stock remains unexpired, inventory is reallocated as necessary, or for other pre-determined business needs.**

- Sites are responsible to complete and ship the contact lens recall accurately and on time. UPCs and quantities included on the **Recall Worksheet** are the **only** items permitted to be included in the recall. It is not permitted to send UPCs and / or quantities that are not requested on the **Recall Worksheet**, unless approval is communicated by the Home Office. Contact lenses that are closest to expiring (oldest) must be prioritized to be included in the current recall.
- Only unexpired, unopened, and resaleable contact lens boxes are permitted to be included in the contact lens recall. Damaged, opened, written on, or expired contact lens boxes must never be included in contact lens recalls. If any contact lens boxes are affected by the above scenarios, they must immediately be damaged out in **Inventory Management** upon identifying and then destroyed.
- Shipping boxes that contain contact lenses must be packed neatly to ensure damage **does not** occur during transit.

### Store Generated Contact Lens Recalls

If approved by TeamVision Operations, a site generated contact lens recalls may be allowed. Follow provided direction at the time of communication. Sites should NOT create their own Contact Lens Return/Recall without TeamVision approval.

### Specialty Contact Lens Returns

For RGP, PMMA, etc. contact lenses see the return policy for each vendor outlined on page 4 of the Contact Lens Handbook. These lenses will not be included with Contact Lens Returns or Recalls.

### Specialty Contact Soft Lens

Use the generic UPCs for any specialty contacts that were fulfilled by Premium Vision that may not be included on your Return/Recall:

UPC	Special Order Type	Brand Name	MFR
20500000362022	SO Contacts Multi-Focal	Proclear Multifocal XR	Cooper
20500000362046	SO Contacts Toric Multi-Focal	Ultra Multifocal Toric Proclear Multifocal Toric Biofinity Multifocal Toric	B&L Cooper Cooper
20500000362039	SO Contacts Toric Single Vision	Proclear Toric XR Biofinity Toric XR	Cooper Cooper

### Team Member Action

- Assist in pulling affected UPCs to be included in the return

### Practice Manager Action

- Ensure return is accurately completed by the communicated due date

### Field Leader Action

- Follow up with execution, ensuring all affected sites complete the return by due date

# CONTACT LENS RETURN

## Premium Vision - Canada



RETURN TO TABLE  
OF CONTENTS

Use the **Contact Lens Return** to key returns during the designed date range. Contact Lens Returns will be prompted from and communicated to sites by Operations or Product teams and should not be initiated by the location.

Return Contact Lens

Open Orders      Closed Orders

Open Orders (2)

Action	Purchasing Doc.	Recall Desc.	Start Date	End Date	
	4538706400		09/08/2023	09/22/2023	>
	4538706401	FIORI Test recall Team Vision Contacts	09/08/2023	09/22/2023	>

Closed Orders (0)

Action	Purchasing Doc.	Recall Desc.	Keyed Date	Keyed By	Keyed Qty	Material Doc.	Mat. Doc. Year
No data found. Try adjusting the filter settings.							

### To Complete a Contact Lens Return:

- Active **Contact Lens Returns** will be listed on the **Open Orders**
- All requested UPCs and quantities will appear once **Open Order** is selected
- Print the **Return Worksheet** to assist in gathering affected UPCs and quantities
- Once units are pulled, enter the on-hand quantity in the **Keyed Quantity Box**
- **Save** will save but not submit the return but must be completed before submission
- Once all quantities have been entered and the return has been determined to be fully accurate, click the Lock icon to **Submit** the PO by selecting **OK**
- Once Submit is selected, no changes can be made to the return and it will move to the **Closed Orders** section on the Contact Lens Return homepage

### Note:

- Do not include any diagnostic (trail) or ophthalmic lenses
- Do not include any boxes that are damaged, expired, written on, or have stickers on them

# CONTACT LENS RETURN

## Premium Vision - Canada



RETURN TO TABLE  
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Change Return Order

Save

Return Order Header

Purchasing Doc: 4538706401  
Plan Quantity: 12

Recall  
Description:  
Start Date: 09/08/2023

Enter UPC and Quantity

\*EAN/UPC:

\*Keyed Qty:  Add

Return Order Items					Total Keyed Qty: 9
EAN/UPC Number	Material Description	Quantity	EUUn	Keyed Quantity	
733905615078	AcOnPl90p 085 142 VISI, -3.25	2	EA	0	
733905615146	AcOnPl90p 085 142 VISI, -5.00	1	EA	1	
733905615177	AcOnPl90p 085 142 VISI, -5.75	4	EA	3	
733905615184	AcOnPl90p 085 142 VISI, -6.00	5	EA	4	
733905849879	OAS1D 90S 8.5 143 VS01, -2.25	0	EA	1	

### Call Outs:

- If you do not have any of the quantity, enter 0 or leave blank. DO NOT delete the line item
- If you receive an error message, read the error to identify what action you need to do to resolve the error to proceed forward
- If you have a higher quantity than what the Return/Recall is requesting (i.e. it asks for 3 but the site has 10), you can add the additional quantity to the recall. This will deduct from your inventory and you will need to take action to readjust to your correct inventory count of zero. **In Inventory Adjustment**, add the UPCs using the Cycle Count - Add Qty Code (Z133)
- If you have no on-hand Contacts to return, you will leave your Open Recall in the system, and it will automatically close. Email TVOps to inform that you did not have any of the requested product. You will need to take action to readjust to your correct inventory count of zero. **In Inventory Adjustment**, remove the UPCs using the Cycle Count - Remove Qty (Z132)

# CONTACT LENS RETURN

## Premium Vision - Canada



RETURN TO TABLE  
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- Print the completed **Return Worksheet**, **Sign**, and retain one copy for your record and **include a copy in every box** that is being shipped containing contact lenses

INNOTIKA 4538706578

Posting Date: 10/02/2022 11:20:06 Movement Type: M1 - GR-Returns  
Document Date: 10/02/2022 Movement Number:  
Document # 0014472728 User Name: L-TST-TV9-MGR  
Document Header Text/Return-Return 4538706578

To:  
T001-Professional EyeCare Assocs. T001  
275 Front Avenue Suite 115  
300 North John Glenn Rd. STE 201  
Paramus NJ 07652-5424 Salt Lake City UT 84116

Line	UPC	Description	Price	Quantity	Line
0001	07898101448	AcuvueMoist 665 142 180, -0.50	\$6.00	-4	0001
0002	07898101177	AcuvueMoist 665 142 180, -0.75	\$6.00	-4	0002

Date: \_\_\_\_\_ Date Total: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date Received: \_\_\_\_\_  
Signature: \_\_\_\_\_

Page 2 of 1

- Contact Lenses must be packed neatly to reduce potential damages occurring in transit, then shipped out immediately
- Prepare the shipping label utilizing **Easyship** in the CIAO! Toolkit for label creation:

### Premium Vision

350 North John Glenn Road, STE 201  
Salt Lake City, UT 84116

- Write the **Tracking Number(s)** on your copy of the **Return Worksheet** and retain for 12 months
- Write **TeamVision Contact Lens Return** and your **Site Number** on the outside of the box(s) and mark number of boxes if applicable
  - Box 1 of 2, Box 2 of 2, etc.



Write **TeamVision Contact Lens Return**  
on each box and **box count**

INNOTIKA 4538706578

Posting Date: 10/02/2022 11:20:06 Movement Type: M1 - GR-Returns  
Document Date: 10/02/2022 Movement Number:  
Document # 0014472728 User Name: L-TST-TV9-MGR  
Document Header Text/Return-Return 4538706578

To:  
T001-Professional EyeCare Assocs. T001  
275 Front Avenue Suite 115  
300 North John Glenn Rd. STE 201  
Paramus NJ 07652-5424 Salt Lake City UT 84116

Line	UPC	Description	Price	Quantity	Line
0001	07898101448	AcuvueMoist 665 142 180, -0.50	\$6.00	-4	0001
0002	07898101177	AcuvueMoist 665 142 180, -0.75	\$6.00	-4	0002

Date: \_\_\_\_\_ Date Total: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date Received: \_\_\_\_\_  
Signature: \_\_\_\_\_

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Tracking #123456

Record **tracking numbers** and  
retain paperwork for 12 months

# CONTACT LENS RETURN

## NOVG - US



RETURN TO TABLE  
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### The Week of the Contact Lens Recall

#### PROCESS:

Locate Recall in  
Inventory Management  
system (Fiori) under  
Return CL.

NOVG will send 1 email  
with a Return Auth Form  
(RMA) to your site's  
primary email account.

Complete recall in  
system and pack/ ship.  
Make sure paperwork is  
in the box.

*Don't see it, check your junk folder*

### Prepare for the recall

1

- Collect all revenue contact lens boxes that need to be returned.
- Do not include any boxes that are damaged, expired, written on, or have stickers on them.
  - Do not include any diagnostic (trial) or ophthalmic lenses
  - For RGP, Scleral, etc., see the return policy for each vendor outlined on page 4 of the Contact Lens Handbook. These lenses **will not** be included in the Contact Lens Return/Recall.

*Reminder – when you return CLs in Ciao! Optical, it adds the stock back to your inventory. Damaged boxes (those that don't qualify for a return) are to be damaged out in Inventory Management right away and disposed of. All other boxes are to be kept in a space earmarked for a CL Recall like this.*

### Complete the Contact Lens Return

2

- Click on the Recall – all requested UPCs and quantities will appear. Print worksheet.

Return Contact Lens

Open Orders (1)

Submit	Purchasing Doc.	Recall Desc.	Start Date	End Date
	4542885677	TVRECALL1223	01/03/2024	01/17/2024

Closed Orders (0)

Action	Purchasing Doc.	Recall Desc.	Keyed Date	Keyed By	Keyed Qty	Material Doc.	Mat. Doc. Year
No data found. Try adjusting the filter settings.							

Change Return Order

Return Order Header

Purchasing Doc: 4538706401  
Plan Quantity: 12

Recall Description:  
Start Date: 09/08/2023

Enter UPC and Quantity

\*EAN/UPC:  Enter EAN/UPC Number...

\*Keyed Qty:  1  Add

Return Order Items

EAN/UPC Number	Material Description	Quantity	EU	Keyed Quantity
733905615078	AcOnPi90p 085 142 VISI, -3.25	2	EA	<input type="text"/> 0 <input type="button"/>
733905615146	AcOnPi90p 085 142 VISI, -5.00	1	EA	<input type="text"/> 1 <input type="button"/>
733905615177	AcOnPi90p 085 142 VISI, -5.75	4	EA	<input type="text"/> 3 <input type="button"/>
733905615184	AcOnPi90p 085 142 VISI, -6.00	5	EA	<input type="text"/> 4 <input type="button"/>
733905849879	OAS1D 905 8.5 143 VS01, -2.25	0	EA	<input type="text"/> 1 <input type="button"/>

**Note:** Sites should NOT create their own Contact Lens Return/Recall without approval from TeamVision Operations. If approved, follow provided direction at the time of communication.

# CONTACT LENS RETURN

## NOVG - US



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3

Use the printed worksheet to manually match up/document all UPCs/boxes and quantities before keying into the system (i.e. write on the sheet; it's easier to track).

- If you have **fewer** boxes than qty listed by UPC – write the actual quantity on your worksheet. You will key this lower # in later.
- If you have more than qty listed by UPC – take note of the larger # on your worksheet.
- For Specialty Soft Contact Lens boxes (ordered through SSS) – use generic UPC below and qty (write on sheet). These will not be in the system recall – you will manually add these to the system recall when ready.

UPC	Special Order Type	Brand Name	MFR
20500000362022	SO Contacts Multi-Focal	Proclear Multifocal XR	Cooper
20500000362046	SO Contacts Toric Multi-Focal	Ultra Multifocal Toric Proclear Multifocal Toric Biofinity Multifocal Toric	B&L Cooper Cooper
20500000362039	SO Contacts Toric Single Vision	Proclear Toric XR Biofinity Toric XR	Cooper Cooper

- If you have no on-hand Contacts to return – you will leave your Open Recall in the system, and it will automatically close/expire (you can't submit it systemically; it won't let you).
  - Email your Market Manager to inform them that you did not have any of the requested product.

4

When you are **ready to enter into the system**, OPEN the RETURN CL in Inventory Management and enter your qty in the **Keyed Quantity** open column. **DO NOT CREATE YOUR OWN RECALL**.

- If you have **fewer** boxes than what is listed – enter the lower quantity and place in shipping box.
  - If you do not have any, enter 0 or leave blank – do not delete the line.
- If you have **more boxes** than what is listed – key in the actual qty first in the system.
  - If it doesn't accept (i.e., you get an error message stating it must be in your inventory), enter in the original qty listed in the system. Write the extra boxes (UPC & Qty) on the RMA form, and then place ALL boxes directly in the shipping box. *Although extra's won't be added to the system recall, you will receive credit if accepted at NOVG.*
- For Specialty Soft Contact Lens boxes (ordered through Service Center) – enter generic UPC from above and actual qty.
  - If it doesn't accept (i.e., you get an error message stating it must be in your inventory), write the extra boxes (UPC & Qty) on the RMA form, and then place boxes directly in the shipping box.
- Once all quantities have been entered and the return is complete, you can **submit** the Return in the system .
  - Click **SAVE** – click the **Lock** icon – click **OK**
  - Once Submit is selected, no changes can be made, and it will move to the Closed Orders section on the Return Contact Lens homepage.



RETU

### Return Instructions:

- Staple the printed Return CL worksheet to this RMA form and place in box.
- On this RMA form, list all extra boxes (UPC and QTY) that are not included in the box back to NOVG. Do not include any UPCs that are included in the Inventory M.
- Add RMA # to the shipping label.
- Write: TeamVision CL Return on the outside of the box. If using more than one box, Note the tracking # (s) on the copies kept on site.

ACCOUNT NAME: NASSAU TEST ACCOUNT	ACCOUNT
RMA ISSUED DATE: 01/23/2024	DATE SHI
OFFICE ADDRESS: 160 LEGRAND AVE, NORTH/ALE, NJ, 07647	Reason: C
UPC	QTY
20500000362039	3
20500000362040	5

# CONTACT LENS RETURN

## NOVG - US



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6

Print the completed Return Worksheet from the system, sign, and attach to the RMA sheet (sent by NOVG)

- Make a copy of both and retain one set for your records and include one set (both Worksheet and RMA) in the box

*Staple these together*

**Sign here**

*On the RMA form – include the extra UPCs and QTY that are in the box BUT NOT included in the system recall.*

*For example, if the recall had requested 25 boxes in total (varying UPCs) in the system and you had 20 of those but then another 7 that you couldn't add to system (i.e., you got the error) – you will have 20 noted on the system Return CL Worksheet that's printed and you will manually write the 7 extra (qty by UPC) on the RMA form in the space available.*

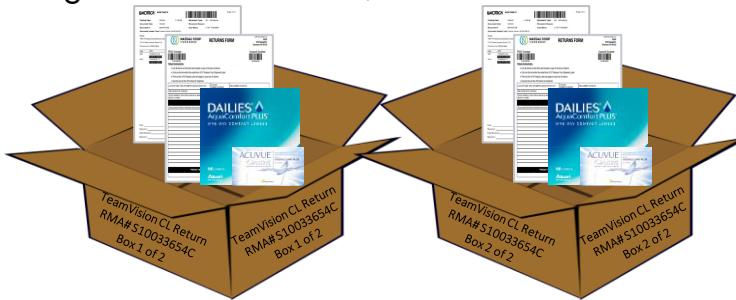
7

Pack and ship the box

- Pack contact lenses neatly to reduce potential damages in transit
- Include one set (both Worksheet and RMA) in every box that is shipped to NOVG.
- Print a shipping label from Easy Ship. Address should be in the EasyShip directory under

**NASSAU RETURNS – 2400 Spiegel Dr, Ste A Groveport, Ohio 43125**

- Write **TeamVision Contact Lens Return** and the **RMA #** on the outside of the box/boxes.
- If you are sending more than one box, also write the number of boxes (i.e., **Box 1 of 2, Box 2 of 2**, etc.)



8

Write the **Tracking Number(s)** on your copy of the **Return Worksheet** and retain for 12 months

Tracking #123456

# CONTACT LENS RETURN

## NOVG - US



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### FAQs (Frequently Asked Questions)

- When entering in the quantity, an error message appears stating the UPC needs to be added to inventory prior to entering in system recall. What do I do?
  - For regular UPC product – simply place direct in the box and do not add to system recall. For example, if the system recall requested 7 boxes of UPC 1234 and you have 9. If you get an error when you enter in 9, change the entry to the original quantity requested in the system (which is 7 in this example). Take note of the extra 2 on the NOVG RMA form (manually write it) and place all 9 directly in the shipping box.
  - For generic UPCs – if the system gives you an error, go ahead and take note of the qty and generic UPC on the NOVG RMA form (manually write it) and place all directly in the shipping box.
- What do I include on the RMA Form?

IF	THEN ON RMA FORM
All the CLs in the shipping box are on the Return CL worksheet in Inventory Management	You leave the RMA as is (no need to write anything on it). Just make sure it's stapled to the printed Return CL worksheet from Inventory Management.
There are extra CLs in the box but NOT on the Return CL worksheet in Inventory Management	Write the UPCs and QTY of each <u>extra</u> box on the RMA in the space available.

The form is titled 'NASSAU OOGP VISION GROUP RETURNS FORM'. It includes fields for 'RMA Number' (with a barcode), 'Return Instructions' (with bullet points), 'Account Number' (with a barcode), and 'Item Description' (with a note: 'Please attach the return description from your Inventory Management system'). At the bottom, it says 'PRODUCT MUST BE IN RESALABLE CONDITION NO STICKERS OR DAMAGE'.

- For future reference, how will I know how many boxes were sent back?
  - The number listed on the Return CL Worksheet + the number of boxes listed on the RMA form should equal the amount that was sent back to NOVG (Nassau OOGP Vision Group).

# PHYSICAL INVENTORY

## Overview & Checklist



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**Physical Inventory is critical to ensure inventory accuracy, control shrink and drive profit. Physical Inventory is conducted two times a year. All locations must achieve practice/site level shrink and inventory accuracy goals and adhere to inventory policies and procedures.**

- Practice Manager (PM) must be present for the location's Physical Inventory. In extreme circumstances, a different manager or corporate team member may excuse PM from being present. In those circumstances PM is responsible for making sure that the leader assigned is fully trained to handle the responsibility.
- PM must ensure damages, inventory adjustments, incoming shipments, recalls, and frame counts are processed correctly.
- PM must ensure Physical Inventory does not take place on retail floor or in doctor's office until after location closing (if applicable).
- PM must follow all inventory preparation activities and procedures within the Physical Inventory Instructions.
- PM must adhere to inventory "cut off" dates on key tasks which include inventory adjustments, etc..

### TeamVision Physical Inventory Prep Checklist

Timing	Activity	Completed
T-4 Weeks	<p>Review the schedule and ensure PM scheduled along with additional Team Members to support PI. Recommended team members to be schedule are based on location on-hands and match number of Zebra scanners (noted on the PI schedule).</p> <p><i>PI date cannot be changed except for special circumstances and approved by TVOps and Field Leader. Additionally, a PM maybe excused from being present by the Field Leader for special or emergency situations. In those circumstances PM is responsible for making sure that the leader assigned is fully trained to handle the responsibility and it is recommended that the Field Leader attend in their absence.</i></p>	
T-4 Weeks	Read all communication and review the Physical Inventory section of the Inventory Management Guide. Print the TeamVision Physical Inventory Prep Checklist and begin to completing activities in cadence to the timeline.	
T-3 Weeks	Identify Frame Kits (Insurance, Safety) that will not be included in PI. Mark them clearly to ensure they do not get scanned during PI. Email TVOps if you are unsure if your frame kit should be inventoried or for any questions around Frame Kits.	
T-3 Weeks	Ensure all frames have legible UPC tags with current pricing/frame details and all prior shipments are tagged and organized. Check ALL frame cases to make sure they are empty and without frames.	
T-3 Weeks	<p>Audit the Contact Lens returns/exchanges for expired or opened boxes. These cannot be inventoried or included in the Contact Lens Return (Recall). You will need to damage and remove in Fiori In-Store Damages (Z134 for expired or Z189 for opened/damaged) . Once the product is damaged in Fiori, you will dispose of the product by opening and trashing all blister packs.</p> <p><i>Do not initiate your own CL Return in Fiori. Following PI a CL Return will be initiated in the system for your location that will request CL on-hands to be sent back to NASSAU.</i></p>	
T-2 Weeks	Field, PM/AMP and any team member attending PI to complete Leonardo Lesson - Physical Inventory Using Zebra.	
T-1 Week	Field and Focus Location PM/APM to attend PI Readiness Call.	
T-1 Week	<p>Complete Frame Recovery and confirm all Damages have been processed in Fiori per the normal two-step process (keyed within In-Store Damages and then removed via Damage Disposition).</p> <p><i>Hold on processing any damages the day of your inventory (you can begin processing damages the following day but continue to hold on Inventory Adjustments or Store To Store Transfers). Reminder, Wearable Electronics including Ray-Ban Meta must be processed in the Smart Glasses Damages &amp; Returns Application within Fiori and shipped with approved boxes and labels available in CP.</i></p>	
T-1 Week	Confirm that all shipments have been received in Fiori and processed (even if received the same day to your PI).	

# PHYSICAL INVENTORY

## Overview & Checklist



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### TeamVision Physical Inventory Prep Checklist

Timing	Activity	Completed
T-3 Days	Ensure all equipment and supplies are received. Contact Zebra Client Care at 1-800-252-2818 or email <a href="mailto:ZRSclientcare@zebra.com">ZRSclientcare@zebra.com</a> for missing or damaged equipment. Go to 'Track My Shipments' on Zebra Dashboard to view shipping details. Keep shipping box, as the return shipping label is on the inside lid.	
T-3 Days	Charge Zebra equipment including scanners and access points. Once charged, test Zebra Access Point and register Zebra Scanners; Contact Zebra Client Care at 1-800-252-2818 with issues or questions.	
T-1 Day	Organize products that should be counted but are not located on the retail-floor (understock, storage, offices, displays, holds, Ray-Ban Meta saleable & dummy SKUs, etc.) and ensure a sticker is assigned to them. Ensure frame kits (not owned safety, sport or insurance product) are marked "Do Not Inventory."	
Day of PI	Pause all Inventory Adjustments or Store To Store Transfers until TVOps communicates you can resume these activities. Any adjustments made during this time will cause discrepancies before PI results are posted in Fiori.	
Prior To Beginning PI	Ensure Ciao! Optical is closed following end of day procedures. If closing procedures are not completed this can cause discrepancies with your inventory. (applicable to after business pm inventory locations)	
Prior To Beginning PI	Log-In to the Zebra Dashboard via AP Icon on Ciao! Toolkit or <a href="https://smartcount.zebrainventory.com">https://smartcount.zebrainventory.com</a> . Username: TXXX@teamvisionteam.com Password: Welcome1234!	
Prior To Beginning PI	Place all Zebra stickers on sales floor (optional - create a Store Map and use to guide). Assign stickers prior to scanning but after the location is closed (they can get lost, etc.).	
Prior To Beginning PI	Log sticker ranges on Sticker Control Log and in the Zebra Dashboard. Contact Zebra Client Care at 1-800-252-2818 with issues.	
Prior To Beginning PI	Pre-count (hand count) products assigned to each sticker as stickers are placed and write totals in "Box 5" on sticker.	
During PI	Confirm that all frame inventory was properly identified and counted (shipments, hold items, understock, etc.). Ensure there are no frames, wellness, accessories, or contact lenses that should be counted in the backroom, offices, OD Lanes, or in window displays.	
During PI	Verify all stickers are accounted for with zero missing (confirm on Zebra Dashboard). Confirm all Zebra Audits were completed (confirm on Zebra Dashboard).	
During PI	Review Not on File report (Dashboard) to ensure valid barcodes were scanned. Stickers with invalid barcodes must be rescanned and correct barcode scanned before closing.	
During PI	Acknowledge that all counts and tasks were performed completely and accurately based on inventory instructions. Follow Inventory Instructions for Closing inventory in Dashboard. <i>If your location is being audited by your Field Leader, they will need to login to Zebra Dashboard and close inventory.</i>	
After PI	Remove stickers and ensure the optical center is patient ready prior to opening.	
After PI	Package up Zebra equipment for shipment back to Zebra. Ensure equipment picked up next day; if not call to set up a FedEx Pick Up.	
After PI	Should you find any inventory that was not counted during your PI after you close in Zebra Dashboard, email TVOps the UPCs in an Excel file with the item description.	
After PI	Should Inventory Control reach out due to high variance with your PI count, all requested items must be reviewed and completed within 24 hours including completing the required CAMS audit.	
Date Shared via TVOps Comms	Resume completing Inventory Adjustments or Store To Store Transfers as needed.	

# PHYSICAL INVENTORY

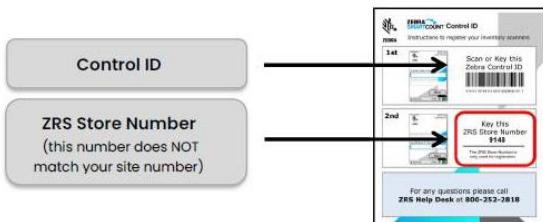
## Charge & Register Scanners



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**Zebra Client Care at 1-800-252-2818 or email [ZRSclientcare@zebra.com](mailto:ZRSclientcare@zebra.com)**

1. Charge all Scanners prior to inventory by lifting flap behind scanner and inserting cord. The indicator light (top left) on scanner will stop flashing when charged.
  2. Connect power cord to Access Point, plug into outlet and wait for connection (power, wireless, and modem windows will light) with 3-4 blue bars being best signal strength.
  3. Register Scanner by turning them "ON" using power button at bottom of scanner.
  4. Push big yellow button on Scanner to scan CONTROL ID Barcode and enter ZRS STORE NUMBER (will not match TeamVision site number).
  5. Perform steps on ALL scanners



Return shipping label is found under inside flap of equipment box and used for return shipping. Fed-Ex pickups are pre-scheduled the day after inventory – please retain your tracking number!

# PHYSICAL INVENTORY

## Zebra Scanners



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### IMPORTANT

When not in use, you **MUST** unplug the Access Point and power off the Scanners!  
TAP the Power button, Then select



### CHG INDICATOR

Blink = Charging

### "ESC"

Press to clear the

### "BKSP"

Press to clear an entry, one position at

### ALPHA



### BATTERY CHARGE

### SCAN

Press to scan barcodes.

### F2

Enable onscreen **MENU** button.

### ENTER

Press to accept an entry.

### "FUNC"

(Function) Key



Power Key

### Power Adapter Port

Pull out rubber cover to insert power adapter when charging



Have a Question? Call Zebra Client Care 24 hours a day at 800-252-2818

# PHYSICAL INVENTORY

## Set Sticker Ranges



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### Log-In to the Zebra Dashboard

<https://smartcount.zebrainventory.com>

- Username: TXXX@TeamVisionTeam.com
- Password: Welcome1234!

### The Dashboard is used to:

- Register sticker ranges
- Track inventory progression (monitor open stickers and piece counts)
- Access audit reports
- Close inventory

### Enter sticker ranges into Dashboard:

- Click **Sticker Ranges** from Dashboard



- Select **Add Sticker Range**
- Choose **Sticker Zone or Area** (Frames, Accessories, Contacts or Lenses)
- Enter starting & ending **Sticker Control Number** - 9 digits excluding hyphens & parenthesis
- Click **OK** and **Add Sticker Range**
- Click **Submit** to save
- Repeat process until all sticker ranges are added

### Placing Fixture Stickers

- One area at a time
- Numeric order
- Top to bottom, left to right
- **25-50 units per sticker max**
- Use the red flag stickers as you complete the scan for each section
- In Dashboard, you will enter the sticker ranges



# PHYSICAL INVENTORY

## Scan Inventory



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### Scanning Sticker Sections:

- Scan all items barcodes
- Pressing enter after each scan is not required
- No multiple quantities keyed
- End by scanning fixture sticker and pressing enter



### Stickers can be rescanned:

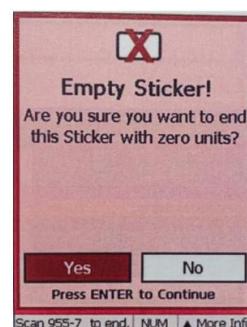
- Entire fixture must be rescanned, not just the missing products
- Write info displayed on scanner in boxes on fixture sticker
- **Red flag sticker indicates area is scanned**
- Manually key products UPC for any damaged barcodes
- Remove double scanned items by pressing "More Info"



### While scanning, pay attention to the following alerts:



**Not On File Warning**  
• Indicates barcode on scanned item is Not on File. All 'Not On File' accepted items will appear on "Not on File Report"



**Empty Sticker**  
• Stickers ended with no units are considered Empty Stickers  
• Empty Sticker Report shows all fixture stickers with zero units



**Rescan Sticker**  
• Indicates sticker was scanned twice on the same device  
• A sticker can be re-scanned, and values changed (only latest date/time of sticker accepted)

Scan Zebra Sticker:		
Sticker	Qty	Sent
1315(955-8)1	3	✗
1315(955-6)5	3	✗
1315(955-5)7	3	✗
1315(955-4)9	2	✗

**Transmitting Stickers**  
• Stickers will automatically transmit  
• The 'Hourglass' and 'Red X' will show pending stickers and the 'Red X' will turn to a green check mark once transmitted

# PHYSICAL INVENTORY

## Inventory Audit

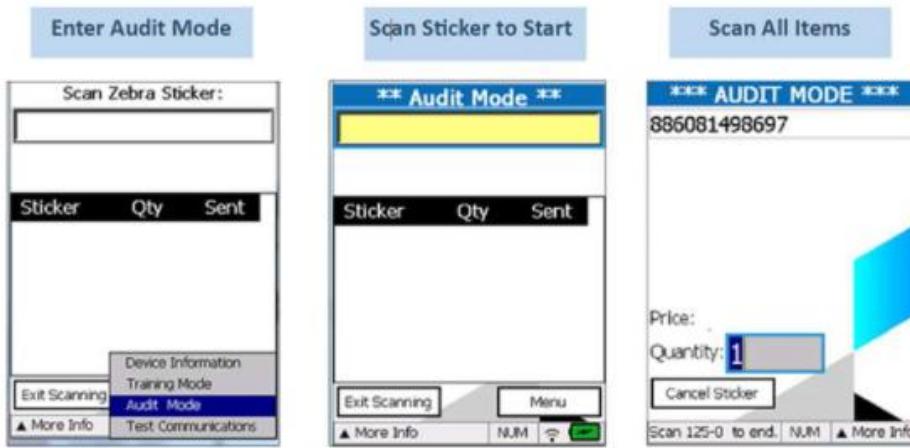


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Audit scanning is the same as regular scanning and results appear on the scanner screen. Auditing is required based on a percent of stickers in the store and the person that originally scanned the sticker may NOT audit the sticker.

### Beginning the Audit:

- Press **Menu** button on the touchscreen of scanner or select F2 on scanner and select **Audit Mode**
- Scan Sticker to start and scan all items on sticker
- All fixtures and stickers are scanned and checked by **someone other than the original scanner**



Once all products are scanned on sticker, you'll receive one of two messages:

- **Audit Match** – Indicates audit scan matches original scan (1 sticker audit complete). Place a second red flag marker on fixture sticker
- **Sticker Not Audited** – Indicates audit scan does not match original scan (not complete). Continue to audit scan the figure until matched to either the original scan, or to a previous audit scan



### Exiting Audit Mode:

- Press **Menu** button and unselect **Audit Mode**
- Determine number of audits required and remaining by checking the **Dashboard**
- You cannot close inventory with audits remaining

# PHYSICAL INVENTORY

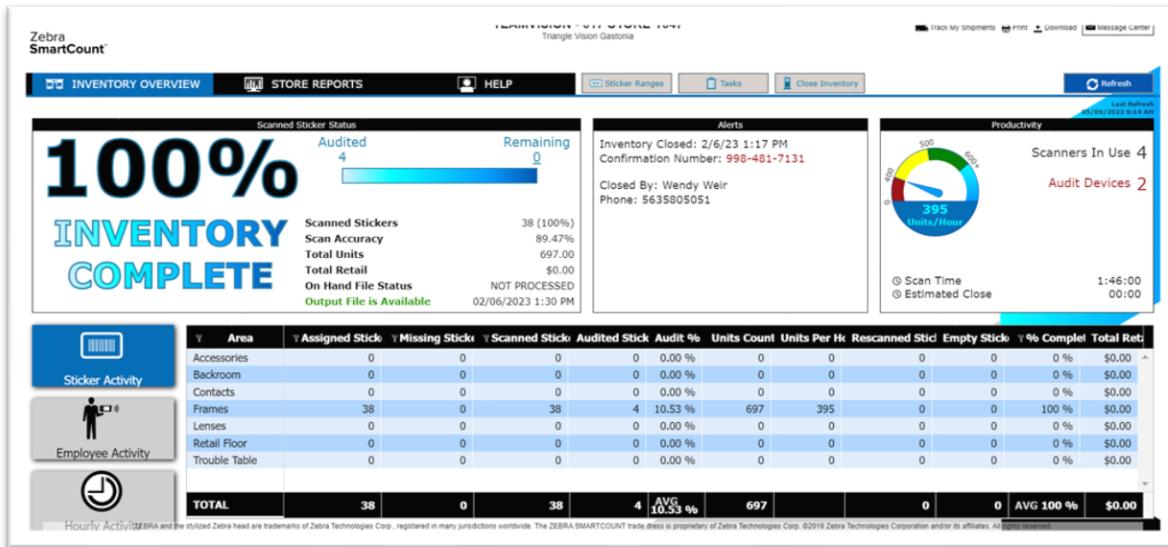
## Close Inventory



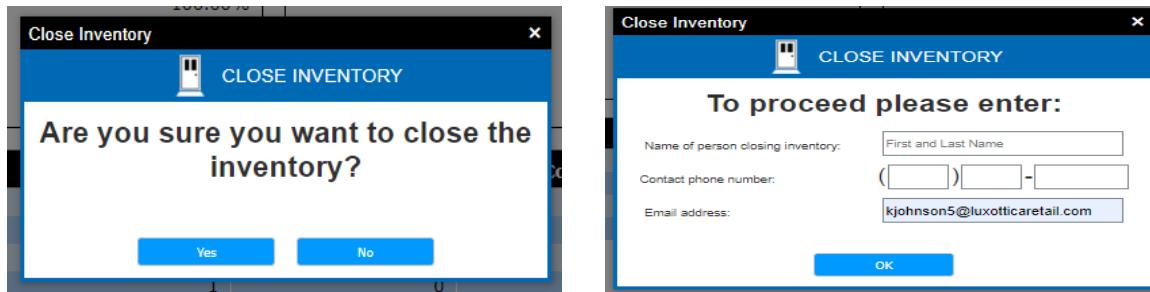
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### Prior to closing inventory confirm:

- All audits completed and corrections made (if applicable)
- All stickers are accounted for with zero missing which is found on Dashboard
- You should see **100% Inventory Complete**



- Before closing inventory, log out and close all scanners



For sites that will be observed by their Field Manager, you are not permitted to close out your own inventory in the Zebra Dashboard as this is the responsibility of the Field Manager observing your site.



### Ship Back Zebra Equipment

After the inventory is completed, all equipment should be carefully packed back into the same box ZRS (Zebra Retail Solutions) shipped to you, so your pickup is not delayed. **Remember to include all scanners, access points, power cords, and all chargers.**

**The return shipping labels are located on the underside of the box flap.** Affix the return label over the original shipping label, tape box closed and ship. Document your return FEDEX Tracking numbers and retain with the PI Paperwork.

**ZRS has pre-arranged a FedEx pick-up of the equipment the day after your inventory is complete.** Sites will be accountable for fees for missing equipment and delays in returning Zebra Inventory items.

### Resume Normal Inventory Management Processes:

- Once communicated by TVOps, you can resume keying Inventory Adjustments or Store-To-Store Transfers as needed. This is typically 2-3 weeks after PI.
- Store damages are NOT considered an inventory adjustment and can be processed immediately following inventory.
- Store Stock Summaries will not reflect actual physical inventory results and keying stock adjustments without guidance will create inventory inaccuracies.

### Record any products accidentally missed during counting:

- Email your Field Manager and TeamVision Operations the **specific UPCs and quantities missed during your PI.**
- TeamVision Operations will forward information to Inventory Control for correction.

# CP ORDER DASHBOARD



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## Create and Add to a new CP Order:

- **Create a New Order** by selecting
- After creating a **New Order** you will see it reflected in the **Current CP Order** list with **End Date** (this is the date the system will auto-submit your order)

### CP Order Dashboard

Current CP Order (1)

Document	End Date
4310879	09/24/2023 >

- **Add Items** by selecting
- Enter the CP Material Number and Order Quantity (must be between the min/max order quantity)

Add Order Item

\*Material: 3041950

\*Order Quantity: 1

- Use to Edit Quantity
- Use to Delete
- Select Save before closing

### CP Order Change

Save Check Recently Ordered Articles

#### Header Data

Sales Order: 4310879  
Ordering Window End Date: 09/24/2023

Total Quantity: 4

Total Actual Price: 16.83 USD

Items												
Document	Item	Article	Article Description	Order Qty	UoM	Price	Total Actual Price	Currency	Item Type			
	000010	3005373	CONTACT LENS FLAT PACKS	3	EA	5.21	15.63	USD	Shipped from Vendor			
	000020	3041950	TISSUE, FACIAL SQUARE BOX EACH	1	EA	1.20	1.20	USD	Shipped from Vendor			

# CP ORDER DASHBOARD



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## Review Recently Ordered Articles:

- Select **Recently Ordered Articles** within the **CP Order Change**
- Easy access to Article Numbers for Re-Orders
- Provides **Ordered Quantity** and **Number of Orders for the Year**

Recently Ordered Articles					
Article	Article Description	Ordered Quantity	UoM	#Orders (1Yr)	
3041950	TISSUE, FACIAL SQUARE BOX EACH	146	EA	27	
3021270	DROPS, BLINK TEARS	115	EA	12	
3021268	KIT, REVITALENS SOLUTION STARTER	110	EA	11	
3021271	DROPS, BLINK CONTACTS	105	EA	11	
3043671	PADS, ALCOHOL PREP PADS 100/CTN	79	EA	19	
3041953	TISSUE, FACIAL RETANGLE BOX EACH	72	EA	27	
3006887	DRUG - Fluorescein Sodium Benoxinate 5mL	70	EA	25	
3029588	WIPES, ALCOHOL, BOX/100	69	EA	29	

## Review Closed Orders (History):

- Select the order from the list
- Within the order you can see Status (i.e. Shipped, Ordered, Backordered, Pending)

CP Order: 4291720

End Date: 09/10/2023

CP Order History (4)														
Sales Document	End Date	Vendor Name	Article	Article Description	Price	Net. Price	Order Quantity	Rejection Reason	Description	Status Description				
4291720	09/10/2023	Aero Fulfillment Services 9945	3030401	PAPER, THERMAL RCPT CIAO! 20/CTN	32.04	32.04	1			Shipped				
4291720	09/10/2023	Hilco	3005421	Chinrest Paper Pins Only - All Models	4.74	9.48	2			Ordered				
4291720	09/10/2023	ABCO Safety	3043671	PADS, ALCOHOL PREP PADS 100/CTN	2.48	4.96	2			Ordered				
4291720	09/10/2023	ULINE	3043643	CUPS, 12OZ DRINKING 1000/CTN	66.00	66.00	1			Ordered				

## Note:

- Backordered items should not be re-ordered and will be filled from original order
- Duplicate orders will show as **Canceled** in Status Description

# CP ARTICLE LOOKUP



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Search:

Article: Article Description: Product Type:

Enter Article...  Enter Article Description or part of it...

Available CP Articles (0)

Product Type Description	Article	Article Description	Price	Currency	Min Delivery Qty	Max Delivery Qty	UoM
No data found							

## Search for items within CP:

- Article number to review the description, price, and min/max quantities
- Description to find general items under a category (keep general, i.e. paper, bulb, label, etc.)
- Product Type will allow a more focused search using Merchandise Categories

Search: Product Type

\*Merchandise Category 1:  
CP Supplies

\*Merchandise Category 2:  
CP Lamps

Merchandise Category 3:  
Lamps and Bulbs

# NUANCE AUDIO RETURNS & DAMAGES



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Nuance frames require specific return procedures due to their battery components. Follow the correct process to ensure proper inventory management, safe shipping, and disposal at the appropriate NAASC location.

Smart Glasses  
Damages & Returns



## WEARABLE ELECTRONICS PROCESS

- The return or damage process depends on how the Nuance frame was obtained. See chart below for details.
- These frames cannot be combined or shipped with regular frame recovery or damages.

PATIENT RETURN OR IN-STORE DAMAGE	MANUFACTURER WARRANTY REDEMPTION
<ul style="list-style-type: none"><li>• If being returned by a patient, process the exchange or return through Ciao! Optical.</li><li>• To remove the item on-hand inventory, process damage using the <b>Smart Glasses Damages &amp; Returns</b> app in Fiori.</li><li>• Once submitted and the Return PO created, select the return under Closed Orders within the app and print two copies of the Article Document slip (one for your records and one to accompany the returned product).</li><li>• Place the unit for return in the box using all required shipping materials required for Smart Eyewear returns/damages (see next page).</li><li>• Place a copy of DC Packing Slip in box before sealing.</li><li>• Seal box &amp; create shipping label in EasyShip for the correct NAASC location for Nuance Returns or Recalls.</li></ul>	<ul style="list-style-type: none"><li>• Patient presents an authorized warranty letter for replacement with value and discount code.</li><li>• Make two copies of the letter (one for your DCR and one to accompany the returned product).</li><li>• In Ciao! Optical, create a new profile for the patient and process the sale, discounting the total to \$0.00 using the Luxottica warranty code in the letter. Document the reason for the discount code in the customer profile notes.</li><li>• <b>No action is required in the Fiori Inventory Management System.</b></li><li>• Place the unit being returned in the box using all required shipping materials required for Smart Eyewear returns/damages (see next page).</li><li>• Place a copy of warranty letter in box before sealing.</li><li>• Seal box &amp; create shipping label in EasyShip for the correct NAASC location for Nuance Warranty Returns.</li></ul>
<b>NAASC Smart EW RTL Return/Recall – 375</b> 101 Greenwood Industrial Pkwy, Ste. 375 McDonough, GA 30253	<b>NAASC Smart EW Manufacturer Warranty – 377</b> 101 Greenwood Industrial Pkwy, Ste. 377 McDonough, GA 30253

### Note:

In-store dummy units damaged in-store can be processed and shipped with non-Smart Eyewear damages using the standard Two-step damage process.

# NUANCE AUDIO RETURNS & DAMAGES



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- **Ship Nuance Audio Smart Glasses via UPS ground shipping.**
- Nuance returns must never be shipped in the same box as other frame damages, recalls, or other Smart Glasses (i.e. Ray-Ban Meta).
- Proper packaging and labels required due to the battery in the frames.
  - Use designated boxes & labels available on CP (item numbers coming soon).



- Yearly, complete the Leonardo training course [Hazardous Materials Handling](#).

## Complete these steps before shipping your Nuance Returns:

1. Confirm the glasses are turned off, then place in the **paper bag** from the Smart Glasses kit.
2. Place charging pad and case (if also being returned) into **unbranded box**.
3. Place filler in box to ensure the frames and unbranded box do not move around in transit:
  - Paper support
  - Corner protector (if necessary)
4. Place bagged frames and unbranded box into **preprinted UN-3480 battery label box**.
5. Enclose **Return Card**.
6. Enclose copy of return paperwork:
  - **Standard Returns / In-Store Damages: Smart Glasses Damages & Returns Article Document**
  - **Warranty Redemptions: Authorized warranty letter**
7. Seal box.
8. Create shipping label using EasyShip. Confirm you have selected the correct NAASC return location based on product origin:
  - **Standard Returns / In-Store Damages: Suite 375**
  - **Warranty Redemptions: Suite 377**
9. Place in designated carrier pickup area.

# META AI DAMAGES & RETURNS



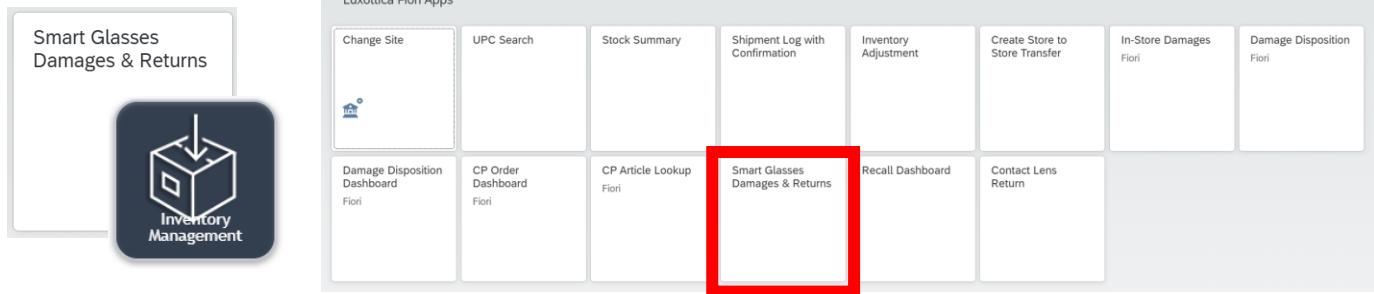
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After you have processed the return/exchange in Ciao! You must complete the **Smart Glasses Damage & Returns process**.

Meta frames cannot be combined or shipped with regular frame recovery or damages.

1

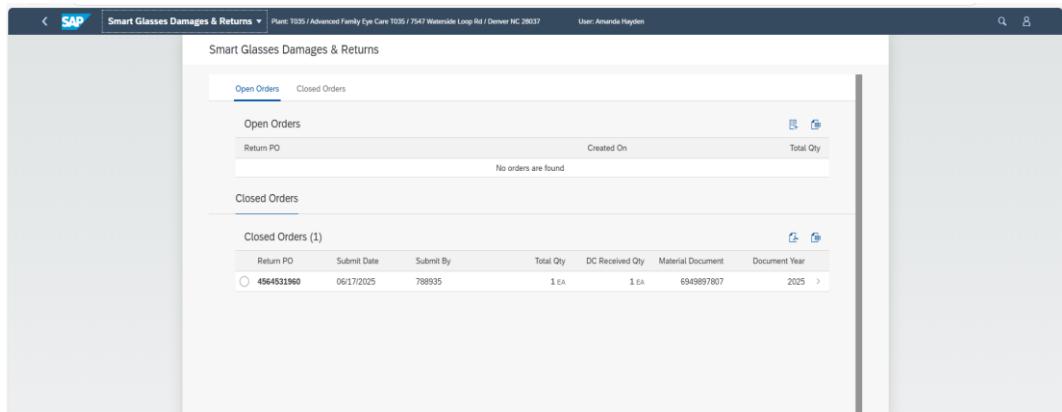
From **Inventory Management**, select the **Smart Glasses Damages & Returns** tile.



2

Select **Open Orders**, select **Create New Order** from the top right.

Select **New** and add the UPC listed on the Return/Exchange receipt. Repeat steps if you have multiple Metas to return.

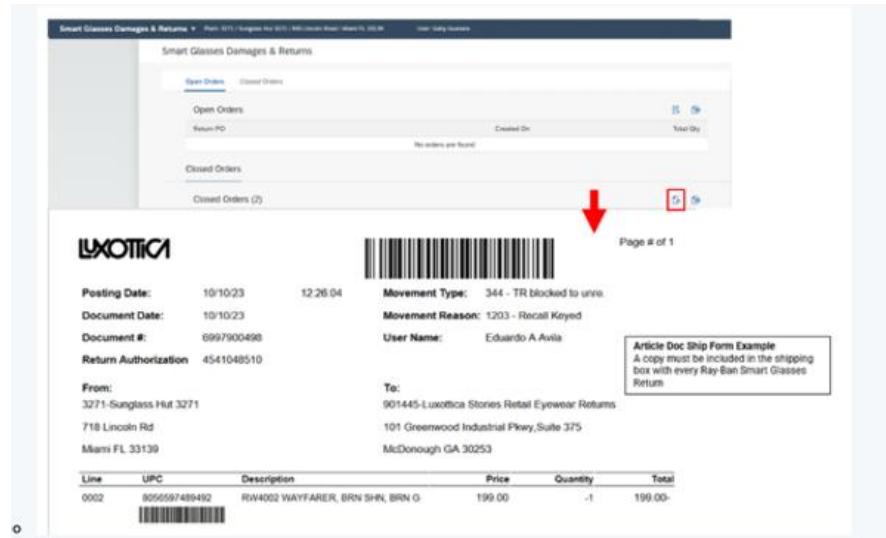


3

Select **Closed Orders**. Select the **Document** icon.

Print 2 copies of the Disposition Article Form and **place 1** in the shipping box.

If you do not, it will not be processed correctly and will result in SHRINK for your Site. Keep the other copy on record, should it need to be referenced at a later date.





**Shipping the Meta Returns is equally important to processing it in Fiori. If these steps are not completed correctly it will result in shrink and impact on-hands.**

- **Ship Meta AI Smart Glasses via UPS ground shipping.**
- Meta returns must never be shipped in the same box as other frame damages, recalls, or other Smart Glasses (i.e. Nuance Audio).
- Proper packaging and labels required due to the battery in the frames.
  - Article 3050712 Wearable, Return, Kit
  - Article 3043974 Box, Shipping Wearable
  - Yearly, complete the Leonardo training course [Hazardous Materials Handling](#)

US Meta AI Glasses Return Address Luxottica NAASC	CA Meta AI Glasses Return Address Luxottica NAASC
NAASC Smart EW Return/Recall 101 Greenwood Industrial Pkwy Suite 375 McDonough, GA 30253	Smart EW Retail Returns 2670 rue Diab St. Laurent, QC H4S1E8

**Wearable technology is considered “Hazard Materials” when shipping, please follow all steps and processes.**

**Please see step by step packaging on next page.**

# META AI SHIPPING GUIDELINES



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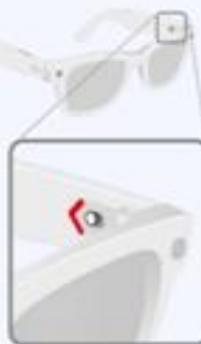
1



Before you begin, check for both the case and the frames, if you do not have both, STOP. This cannot be shipped.

Contact [retailsafety@luxotticaretail.com](mailto:retailsafety@luxotticaretail.com) for instruction.

2



Check glasses are in «off» position.

3



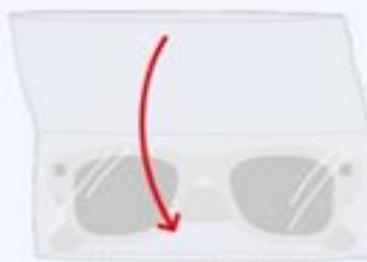
Check for damaged battery:

- Touch the frames and the case to see if it feels hot to the touch
- Look for bulging or expansion of the surface

If either frames or case seems overheated or otherwise damaged, stop and contact safety team:

[retailsafety@luxotticaretail.com](mailto:retailsafety@luxotticaretail.com)

4



Place glasses into the provided protective sleeve.

5



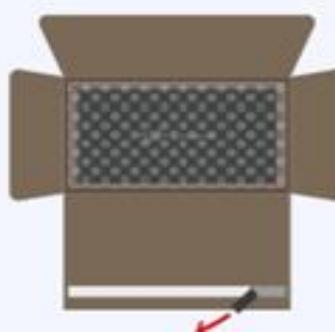
Place packaged glasses into the charging case, then place the charging case into the box and close.

6



Place the "package" (charging case with interior protected glasses) into the larger protective / bubble wrap sleeve

7



Pack the wrapped package inside the shipping box.

Place  
shipping  
document  
in box

8



Prepare outside labeling.