

Simply Optical

Getting Started Guide — from download to your first quote

Before you begin

Simply Optical runs entirely in your web browser — no installation, no account, no cloud. Any modern browser works; **Chrome or Edge** is recommended if you want the automatic “Print Inbox” benefits import covered in Step 4. Your 30-day free trial starts the moment you open the app for the first time — no credit card required.

Step 1 — Get your copy

- Go to simplyoptical.net and fill out the sign-up form: practice name, your name, email, phone, and address.
- Enter your practice name exactly the way you want it to appear — this is the name your license codes are generated from, so it has to match on both ends.
- Choose monthly (\$75/mo) or annual (\$50/mo, billed yearly) billing.
- Click **Start my free 30-day trial**. Your file downloads automatically, already set up with your practice name filled in.

***Note:** Save the downloaded file somewhere permanent, like your desktop. If more than one computer in the office will use Simply Optical, see “Setting up multiple computers” near the end of this guide — each one needs its own copy.*

Step 2 — First launch: Practice Settings

The first time you open the file, the “Welcome to Simply Optical” setup wizard opens automatically. You can always come back to it later from **Practice Settings** in the top toolbar.

- **Practice name / phone / logo** — confirm your practice name reads exactly as you submitted it on the sign-up form. Add a logo if you'd like it on printed quotes.
- **Sales tax** — enter your local rate and check which categories it applies to (eyeglasses, contact lenses, exams & procedures, miscellaneous products).
- **What does your practice sell?** — check every lens brand, contact lens brand, and service line you carry. Anything left unchecked disappears from the rest of the app (you can turn it back on here anytime).
- **Products & pricing** — open each section, uncheck anything you don't carry, and enter your own retail price for each item you keep. Changes save instantly.
- Click **Save & start** when you're done.

Step 3 — Set up your insurance plans (Plan Packages)

Click **Plan Packages** in the top toolbar. This is where you teach Simply Optical how each insurance plan you accept pays out, so it can auto-fill a patient's benefits the moment you pick their plan.

- Choose a carrier from the dropdown — VSP, EyeMed, Davis Vision / Superior Vision (Versant), or add your own regional plan.
- Enter that plan's frame allowance, material copay, lens/coating discounts, contact lens allowance, exam copay, and so on.
- For EyeMed or Davis/Superior tiered lens pricing, check the “Use tier copays” box to reveal the tier-specific fields.
- Save, then repeat for every plan you accept. Once a plan is saved, selecting it on a patient's chargeout fills these in automatically — every value stays editable per patient.

Step 4 — Import patient benefits

You don't have to retype a patient's benefits by hand. There are two ways to bring them in, both from the **Import Benefits** button:

Option A — Paste or choose a file

- Open the carrier's benefits/authorization page, select all (Ctrl+A) and copy (Ctrl+C), then paste into the Import Benefits box — or choose a PDF/.txt file instead.
- Click **Read benefits**, review the preview, then **Apply to chargeout**.
- Scanned or picture-based PDFs are read automatically with OCR (a little slower, and the reader downloads once from the internet the first time you use it — the PDF itself never leaves your computer).

Option B — Print Inbox: automatic import (Chrome/Edge only)

- Make a folder — for example, one called “Simply Optical Inbox” on your desktop.
- In the Import Benefits dialog, click **Choose inbox folder...** and select that folder. You'll only do this once.
- From then on: whenever anyone at the practice prints a benefits page to PDF into that folder, Simply Optical notices the new file within a few seconds and opens the import dialog for you automatically — no manual file picking.
- Use the browser's own “**Save as PDF**” option in the print dialog, not “Microsoft Print to PDF” — it reads more reliably.
- After restarting the browser, you'll see a banner asking you to click **Resume** once — this re-grants folder permission and is a normal browser security step, not an error.

***Note:** If an import doesn't read correctly, click “Redact & save sample” in the Import Benefits dialog — it strips the patient's name, birth date, and ID numbers, then saves a file you can email to hello@simplyoptical.net so that format can be added.*

Setting up multiple computers

Simply Optical keeps its settings in the browser on each individual computer — there's no cloud account tying them together, which is also what keeps patient data private. You don't need to redo Steps 2 and 3 by hand on every machine, though — export the setup once and load it everywhere else:

- On the computer you already configured, open **Practice Settings** and click **Export setup file...** at the bottom. This saves a file containing your practice info, pricing, and every insurance plan you've set up.
- On each additional computer, open Simply Optical for the first time and click **Import setup file...** at the top of the welcome screen, then choose that file. Everything comes across at once and the app reloads, fully configured.
- Made a pricing or plan change later? Export again from your main computer and re-import on the others to keep them in sync.

***Note:** Importing replaces that computer's practice info, pricing, and insurance plans with what's in the file — use it on a fresh installation or when you deliberately want to overwrite what's there.*

Handing a patient's chargeout between computers

If the front desk pulls a patient's insurance and starts their quote, then an optician picks it up at the dispensing table on a different computer, you can pass that one chargeout along using a shared folder on your network — no new software, just the **Save Chargeout** and **Open Chargeout** buttons already in the toolbar.

What this does — and doesn't — do

- This is a hand-off, not live co-editing. Only one person should be actively working on a given chargeout at a time.
- Simply Optical names each saved file after the patient and date of service (e.g. Chargeout_JaneDoe_2026-07-25.json), so different patients' files won't collide. If the same patient's chargeout is saved twice in one day by two people without coordinating, the second save overwrites the first.

***Note:** For a reopened chargeout to show the right prices and options, both computers should be running the same catalog and pricing — use **Export/Import setup file** (previous section) so every computer matches.*

One-time setup: a shared folder every computer can reach

- **A local network share** — if the office already has a shared drive (a NAS, a server, or a shared folder on one of the office computers), map or mount it on every computer that will use Simply Optical (Windows: “Map network drive” in File Explorer; Mac: Finder → Go → Connect to Server).
- **A synced cloud folder** — if there's no in-house network share, a synced folder from Dropbox, Google Drive, or OneDrive works just as well and is usually simpler: install the desktop app on each computer and share one folder between them.
- Either way, create one folder everyone can reach — for example, “Simply Optical Chargeouts.”

One-time setup: tell your browser to ask where to save

By default, most browsers save downloads straight to the Downloads folder without asking. Turn on “ask where to save” once per computer so Save Chargeout can actually be pointed at the shared folder:

- **Chrome:** Settings → Downloads → turn on “Ask where to save each file before downloading.”
- **Edge:** Settings → Downloads → turn on “Ask me what to do with each download.”
- **Firefox:** Settings → General → Files and Applications → “Always ask you where to save files.”
- **Safari:** Safari → Settings → General → set “File download location” to “Ask for each download.”

Handing off a patient

- Person A pulls up the patient, enters or imports their insurance benefits, and builds out the quote as far as they're going.
- Click **Save Chargeout**. When the save dialog appears, navigate to the shared folder and save it there.
- Person B, at their own computer, opens Simply Optical and clicks **Open Chargeout**.
- In the file picker, browse to that same shared folder and select the patient's file — insurance, frame, lenses, contacts, and notes all come back exactly as Person A left them.
- Person B finishes the quote and prints it, or saves it back to the shared folder if it needs to move along again.

Your license

- The app starts on a free 30-day trial the moment you first open it — no code needed at first.
- Near the end of your trial (or your current paid period), it will prompt you for a code.
- **Billed monthly:** you'll get a new code each month, with a short grace window at the start of the new month if you haven't entered it yet.
- **Billed annually:** one code covers the entire calendar year — no monthly re-entry.
- Codes are generated from your practice name exactly as entered in **Practice Settings**. If a code is ever rejected, that field is the first thing to check.

Quoting a patient

Pick the patient's insurance plan, add eyeglasses and/or contact lenses, and check off the lens options they want — the total updates live as you go. Print a branded quote at any point, and save the chargeout to a file if you'd like to reopen it when the patient comes back to decide.