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Optical POS Software Evaluation Checklist

Everything you need to evaluate and choose the right point-of-sale system for your optical retail business

[FREE DOWNLOAD](#)

1 Core POS Functionality

Essential transaction processing capabilities every optical POS must have.

- Fast transaction processing** - Complete sales in under 2 minutes **MUST HAVE**
- Multiple payment methods** - Cash, cards, mobile wallets, insurance **MUST HAVE**
- Split payment support** - Handle insurance + patient portion seamlessly **MUST HAVE**
- Returns & exchanges** - Manage warranty claims and prescription changes **IMPORTANT**
- Receipt customization** - Professional receipts with your branding **IMPORTANT**

2 Prescription Management

Optical-specific features that generic POS systems cannot provide.

- Digital prescription records** - Store sphere, cylinder, axis, PD for each eye **MUST HAVE**
- Prescription history** - Access complete patient eye health records **MUST HAVE**
- Lens configuration** - Build orders with lens type, material, coatings **MUST HAVE**
- Lab integration** - Send lens orders directly to optical labs **IMPORTANT**
- Order tracking** - Monitor status from prescription to fulfillment **IMPORTANT**

Pro Tip

During your demo, ask the vendor to walk through a complete sale from prescription entry to checkout. This will reveal how well the system handles optical-specific workflows.

3 Inventory Management

Track frames, lenses, and accessories with optical-specific SKU handling.

- Real-time stock tracking** - Know availability across all locations **MUST HAVE**
- Matrix inventory** - Track frames by brand x style x color x size **MUST HAVE**
- Automatic reorder alerts** - Never run out of popular frames **MUST HAVE**

- Supplier integration** - Import product data directly from suppliers **IMPORTANT**

4 Patient Management

Build lasting relationships with comprehensive patient profiles.

- Complete patient profiles** - Contact info, preferences, insurance details **MUST HAVE**
- Appointment scheduling** - Book eye exams and fittings **MUST HAVE**
- Automated reminders** - Reduce no-shows with SMS/email alerts **MUST HAVE**
- Recall management** - Bring patients back for annual exams **MUST HAVE**

5 Business Intelligence

Data-driven insights to make smarter business decisions.

- Sales analytics** - Understand what's selling and when **MUST HAVE**
- Product performance** - Identify top frames and slow movers **MUST HAVE**
- Profit margin analysis** - Know which products drive profitability **MUST HAVE**

Feature Category	Generic POS	Optical POS
Prescription Management	X	✓
Frame Matrix Inventory	X	✓
Patient Recall System	X	✓
Insurance Processing	X	✓

6 Support & Implementation

The vendor relationship is just as important as the software.

- Data migration service** - Secure transfer of existing records **MUST HAVE**
- Onboarding & training** - Get your team up to speed quickly **MUST HAVE**
- Responsive support** - Multiple channels (phone, email, chat) **MUST HAVE**

- Regular updates - Continuous feature improvements **IMPORTANT**

7 Questions to Ask During Demos

Use these questions to evaluate vendors objectively.

- "How long does implementation take?" *(Look for: 2-4 weeks)*
- "What happens to my existing data?" *(Look for: Secure migration)*
- "Can I try before committing?" *(Look for: Free trial)*
- "What's the total cost of ownership?" *(Look for: Transparent pricing)*

Your Notes

Ready to See PractoPal in Action?

See how our all-in-one optical management software can streamline your operations, improve patient engagement, and help your optical business grow with confidence.

[Book Your Free Demo](#)

Or WhatsApp us directly at [+65 8118 0039](tel:+6581180039)

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