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Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide Stock

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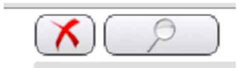
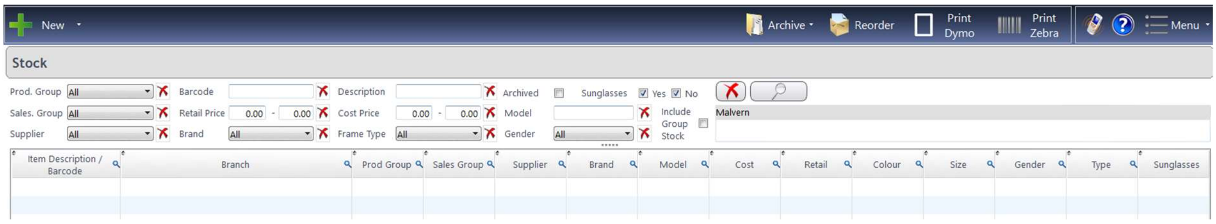
Stock

The Stock section can be found in the menu options on the left of your FLEX screen.

Your stock screen will be empty when you first go onto the module. This is to stop all of your stock items loading straight away and slowing the system down. As soon as you select a value, be it from a drop-down or by typing in letters, items will appear.

The screenshot below shows the filter options you can search with. The red X's next to each filter is a quick clear button. There is also a larger red X next to the search button which deletes *all* filters chosen.





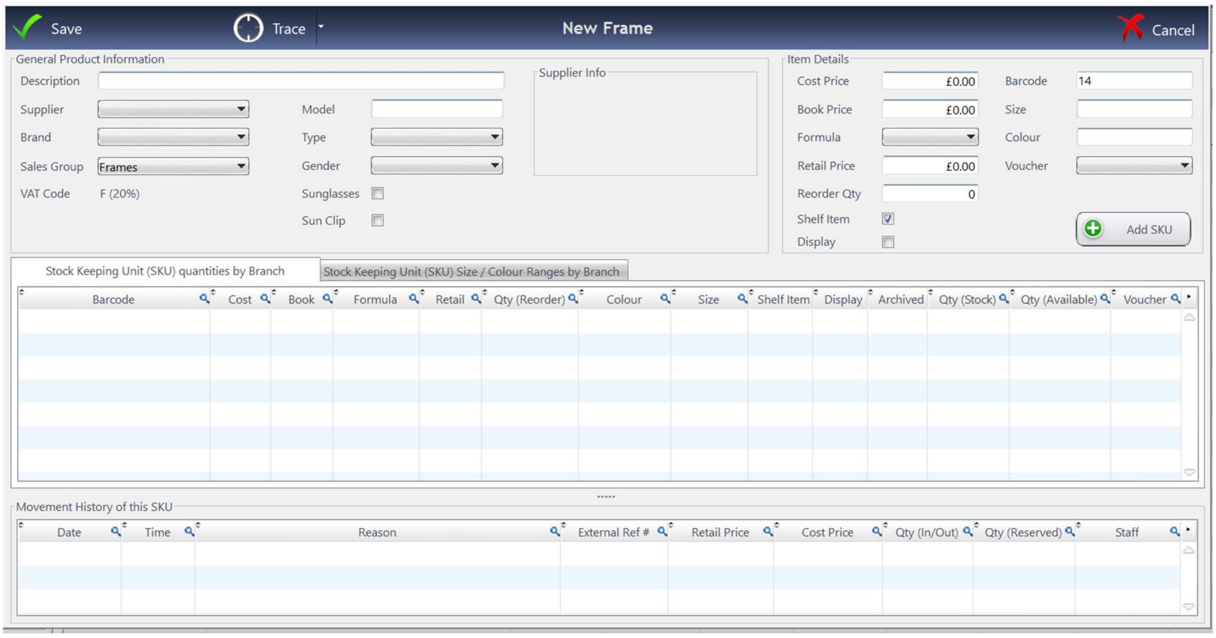
The Function of Stock is as follows:

- Stock levels automatically updated when an item is Dispensed or Ordered and sent to the Till.
- Manual update stock levels.
- Adding and updating frames, solutions and sundries.
- * **New** stock item (Frame, Solution, Sundry and C:/Package)
- **Archive** – specific items or all items of a zero quantity.
- **View Archived** – Check the **Archived** box (next to the description filter).
- **Reorder** items and **Print Dymo & Zebra** labels for selected items.
- **View** and **Update** Stock Items
- Create a Similar Stock Item based on an existing item (for example a new Frame Colour).
- Update a Stock Quantity and perform Other Stock Functions.

*When creating a stock item the more details you enter for each stock item, the more powerful your searching ability is.

Add Stock Item

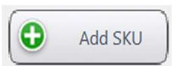
- Press **New** and select **Frame.**



- Enter the Description and Model of the Frame ("Free Text")
- All the other options are set in the drop-down menus. The entries within these boxes are customisable in the Setup Menu.
- Tick the check boxes if necessary. You must enter a Sales Group, Gender and Retail Price.

The Right hand side of the window...

- Enter the **Cost Price** and the **Book Price** (these may be the same).
- Select the **Formula** for working out the **Retail Price** (these can be set in the Setup Menu) - or just enter the **Retail Price** manually.
- The Re-Order quantity can be set and whether this is a Shelf / Display Item.
- The barcode is automatically generated, size and colour can be set, along with any voucher entitlements.

You are then ready to add the SKU (Stock Keeping Unit). Press 

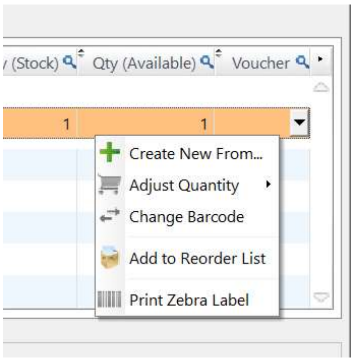
. The item will now be saved into the Database.

It will then ask for a Delivery reference number and which branch you are adding the item to.

This item will then appear within the **Frame Stock** (or the relevant category selected) To adjust amount or change Barcode, right click the stock item and select **Adjust Quantity** or **Change Barcode**.

Within the **Adjust Quantity** the following options are available:

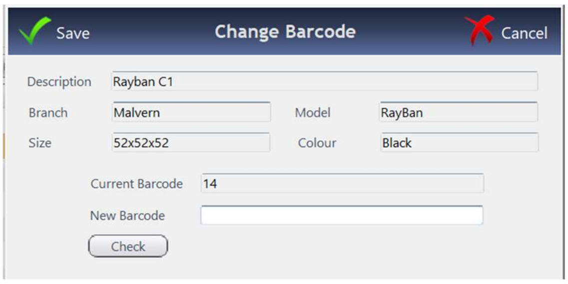
- Delivery from supplier
- Returned to Supplier
- Manual Adjustment (Up)
- Manual Adjustment (Down)
- Written Off
- Reserved for Patient
- Release from Reservation
- Custom Reason (Setup Menu to add these)



Change Barcode

If using a barcode scanner it would be advisable to add items using the relevant barcode. Any exiting stock item barcodes can be added here.

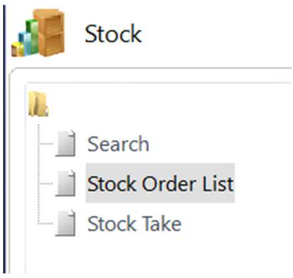
- Add the Barcode
- Click "**Check**"
- Flex will go through stock to make sure that this barcode isn't already in use for another product.
- Click Save to complete the update.



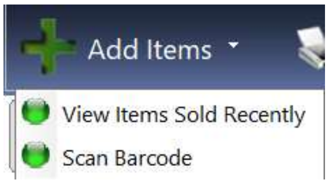
Re-Order List/Stock Order List

To add an item to the Stock Re-Order list can be done through this right click menu but also by clicking on the **Reorder** button on the blue bar at the top of the stock screen. (Select the time to be reordered to check you are ordering the correct item).

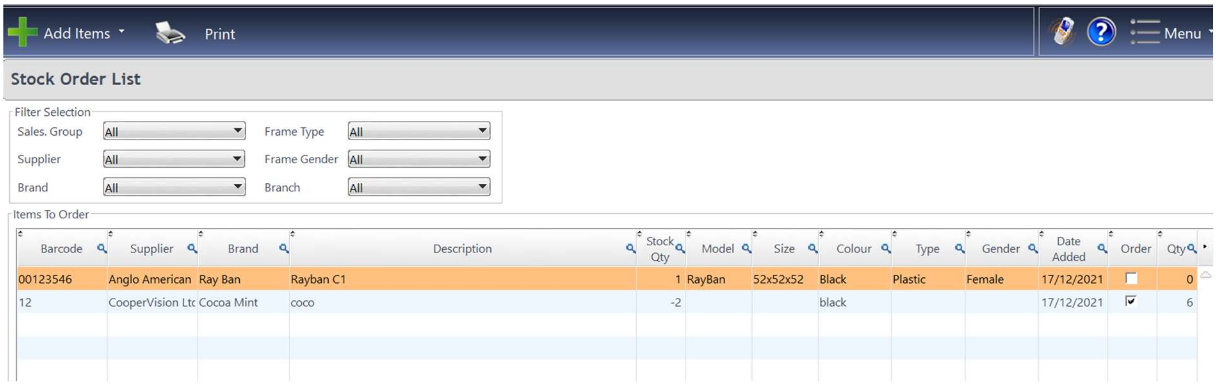
This Stock order list can be viewed within the stock menu > Stock Order List on the left of the screen.



Adding additional items to Stock Order list can also be done from the **Stock Order List Menu** option.



- **Add Items** from the top-left.
- Two options are available. **View Items Sold** and **Scan Barcode**
    - **View Items Sold** – Shows everything sold within a select time period.
    - Various filters are available as well as choosing a time frame.
    - Click on the item you want to add to order list
    - Add the quality to order by double clicking on the QTY on the right of the item.
    - Click on **Add to Order List** (Top left of the window).
    - To Remove an Item – right Click item and delete.



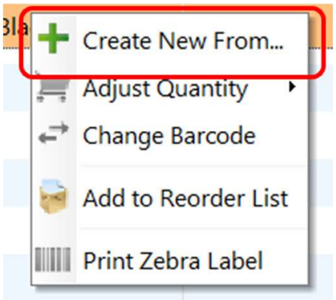
- **Scan Barcode**, and either scan the label or just enter the number manually and press enter. It will then be added to this list.

NHS Vouchers

Stock items can be linked to an NHS Voucher that is automatically added to the Till when the stock item is sold.

This is normally only used for Sight Tests, as practices take the voucher off the total amount at time of payment.

Create New



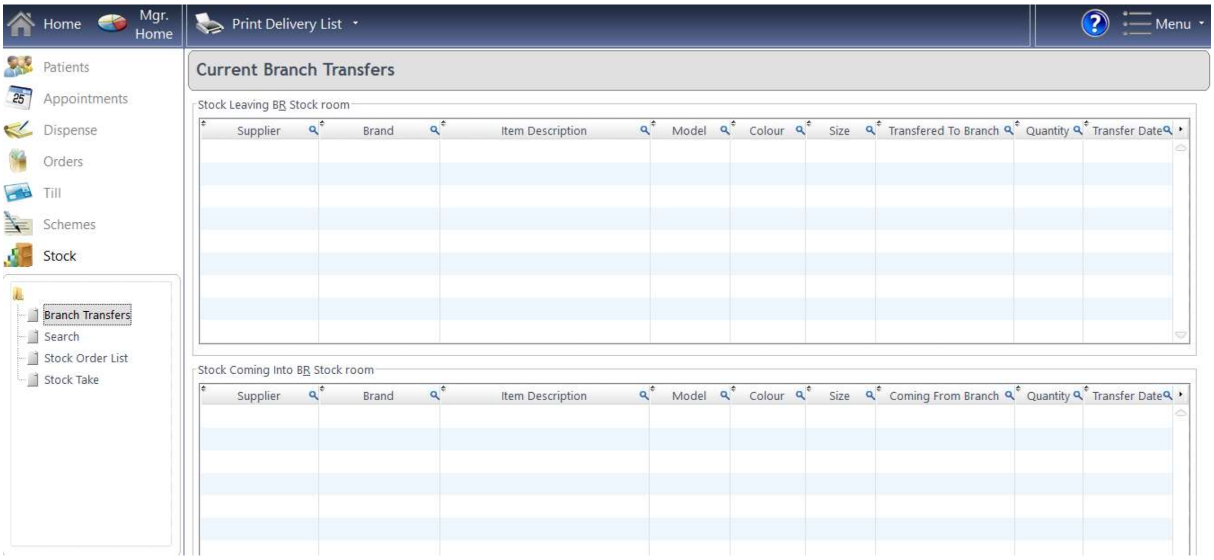
From the Right click menu against the item **Create New From.**

- A duplicate stock item window will be created. This will have all the same stock details from the existing item.
- Enter the new details for the similar product (this is normally used for different sizes, colours, or both).
- Press **Save** when complete. Like with a new item, it will ask for any reference number and for the current stock level.
- The movement history will update in the bottom section of the window, showing the date and time of adjustment, along with the reason for the change.

Transfer between Branches

When using either FLEX RDP, our multi-site solution, you can transfer stock items between branches.

- Under **Stock,** click to **Branch Transfers**.
- You will be able to see **Stock Leaving <branch>** and **Stock Coming Into <branch>.** The screen below will be shown:



In either window, you can right-click and choose **Cancel Transfer**, whilst in the bottom window, for the receiving branch, you can also right-click and **Confirm Delivery.** The item will then be removed from the "Stock Leaving" window of the supplying branch.

If you press **Print Delivery List**, you can print a list of **Transfers going to <branch>.** Make sure you are logged into the correct originating branch. With current FLEX functionality, you can only send items from the branch you are logged into.

Reports

Under Business Intelligence > Reporting > Stock, there are **Available Reports** available for:

- **Frame Stock by Age**
- **Frame Stock Take**
- **Frame Stock Valuation (also available for Solutions, Sundries)**
- **Stock Movement**
- **Sundry Stock Valuation**

Choose a report and choose relevant **Selection Criteria**, and press the "Go" button to run your reports.