

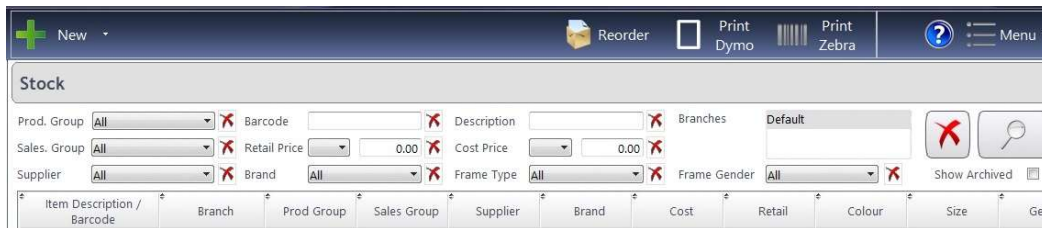
Optinet™
FLEX
ADVANCED PRACTICE MANAGEMENT SOFTWARE



A guide to Stock in FLEX from Optinet.

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Stock levels in FLEX are automatically updated when an item is Dispensed and Ordered and sent to the Till. In this module, we can manually update stock levels, as well as adding and updating frames, solutions and sundries. The screenshot below shows the overview of this window.



We can add a **New** stock item (Frame, Solution, Sundry), **Reorder** items and **Print Dymo & Zebra** labels for selected items. The subsequent pages will show you how to

- Create a brand new Stock Item
- 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

The more details you enter for each stock item, the more powerful your searching ability is. To clear all the filters, press the **X** on the far-right of the window. Results should update automatically as you search through the filters. If they do not, use the large magnifying glass on the far-right side.

Stock items can also be **archived**. If an item has been archived accidentally or you wish to see all inactive items, check the **Show Archived** box.

Note: 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.

To add a stock item, Press **New** and select **Frame**. (this process is very similar for **Sundries and Solutions** but is not shown in this guide – please see the online help for more information)

- 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
- Tick the check boxes if necessary. You must enter a Sales Group, Gender and Retail Price.

Moving to 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 Setup) - or just enter the **Retail Price** manually.
- The Re-Order quantity can be set and whether this is a Shelf / Display Item.
- The barcode, branch (if necessary), size and colour can be set, along with any voucher entitlements.

You are then ready to add the SKU (Stock Keeping Unit). Press the button which says + **Add SKU**

The stock item will not be saved into your database without pressing Add SKU!

It will then ask for any reference number and how many you are adding.

This item will then appear within the **Frame Stock** (or the relevant category selected)

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 (i.e. on the Till)

Creating a new item similar to an existing one is a simple process. Go to [Update a Stock Item](#).

Right click on the item and press **+ Create New From...**

The window on the right hand side titled **Item Details** will appear.

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.

Save Trace Update Frame Cancel

General Product Information

Description Superdry Sunglasses

Supplier Arena Eyewear Model Osaka

Brand Superdry Type Metal

Sales Group Frames Gender Unisex

VAT Code F (20%) Sunglasses Sun Clip

Item Details

Cost Price £35.00 Barcode 686119

Book Price £39.00 Branch Malvern

Formula PLASTIC Size

Retail Price £64.00 Colour BLK

Reorder Qty 1 Voucher

Shelf Item Add SKU

Display

Stock Keeping Unit (SKU) quantities by Branch

Barcode	Cost	Book	Formula	Retail	Qty (Reorder)	Colour	Size	Shelf Item	Display	Qty (In Stock)	Qty (Available)	Voucher
686118	£35.00	£39.00	PLASTIC	£64.00	1	RLK		<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	3	

Movement History of this SKU

Date	Time	Reason	External Ref #	Retail Price	Cost Price	Qty (In/Out)	Qty (Reserved)
16/04/2014	12:02	Stock Initialisation		£64.00	£35.00	3	0

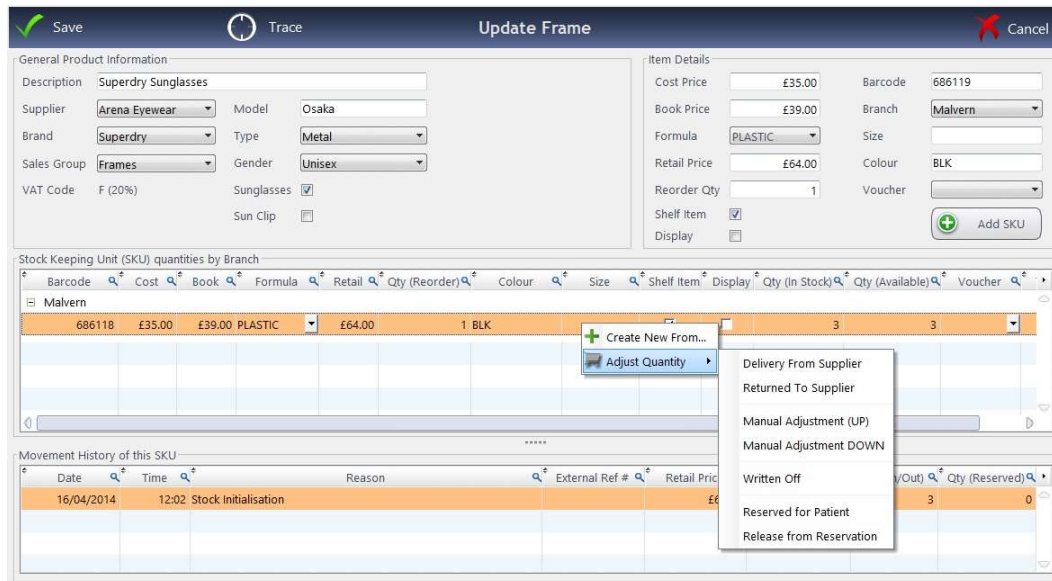
It is straight-forward to adjust a stock quantity in FLEX. Open up the item and double click, as if to update.

Right click (like when you went to Add a Similar Item) and press **Adjust Quantity** >

A drop-down menu will appear and the relevant quantity adjustment can be actioned.

Again, this may ask for a reference number, and will ask for the new amount in stock.

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.



To archive (essentially, delete) an item from the system, double-click into it on the Stock screen. The window below will appear.

General Product Information

Description:

Supplier: Model:

Brand: Type:

Sales Group: Gender:

VAT Code: Sunglasses:

Sun Clip:

Stock Keeping Unit (SKU) quantities by Branch

Barcode	Retail	Colour	Size	Qty (In Stock)	Archived
	3	£0.00		0	<input type="checkbox"/>

Movement History of this SKU

Date	Time	Reason	Retail Price	Qty (In/Out)	Staff
09/10/2014	10:37	Till Sale	£10.00	0	Jason
06/10/2014	14:57	Till Sale	£15.00	0	Jason
06/10/2014	13:16	Till Sale	£15.00	0	Jason
23/09/2014	11:01	Till Sale	£69.00	0	Nicole

Tick the box called "**Archived**" in the middle section of the window. When you press **Save**, this will now have disappeared from the Stock screen, unless **Show Archived** is ticked.

How Do I Print a Label?



Press **Print Zebra** or **Print Dymo** to Print the Zebra or Dymo Label for the frame. This will bring up a **Select Template** box, where you can select the label to print. The printers and labels must be initially configured in [Setup](#)

How Do I Do a Stock Take?

To do a Stock Take in FLEX, head to Stock - Stock Take in the online help or see the separate QuickStart guide.

How Do I View my Stock Order List?

To view your Stock Order List, under **Stock**, click to **Stock Order List**. The screen below is displayed, showing all the items which you need to reorder. Items will be added to this list when they reach their reorder quantity. This quantity is set when a stock item is added (see [How Do I Add a Frame?](#) - although the process is the same for a [Sundry](#) or [Solution](#)).

You can also add items into this manually by choosing **Add Items** from the top-left. Press **Scan Barcode**, and either scan the label or just enter the number manually and press enter. It will then be added to this list.

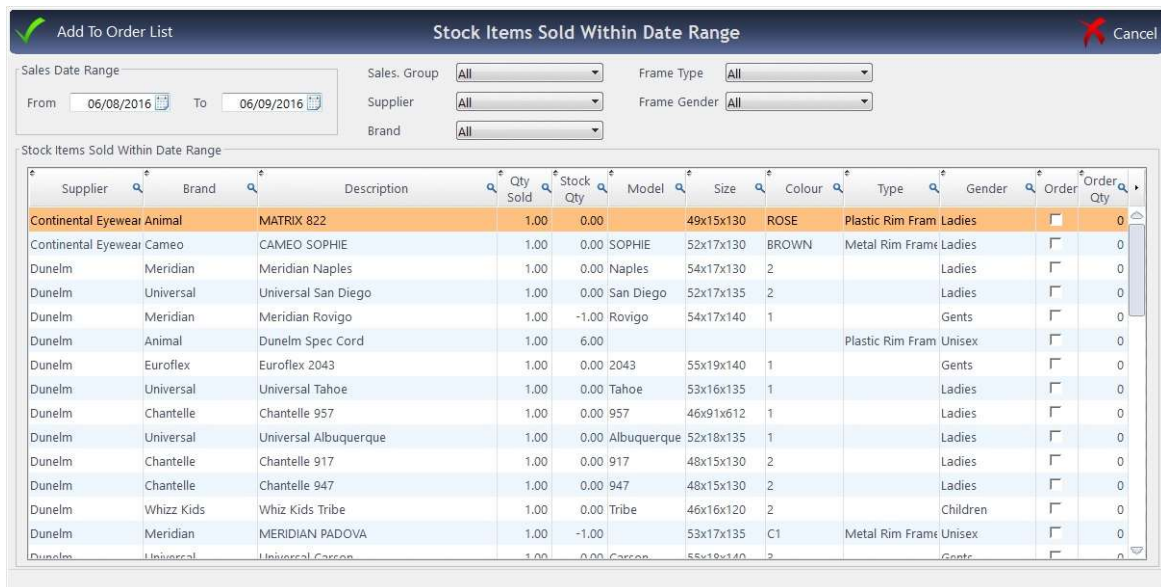
Barcode	Supplier	Brand	Description	Stock Qty	Model	Size	Colour	Type	Gender	Date Added	Order	Qty
1656645360	Bushnell	Bolle	Bolle Prince	0	11272		Metallic Red		Children	23/04/2015	<input type="checkbox"/>	0
1656645357	Bushnell	Bolle	Bolle Jenny	1	11984				Children	28/05/2015	<input type="checkbox"/>	0
1656645350	Bushnell	Bolle	Bolle Vibe	0	11656				Unisex	26/06/2015	<input type="checkbox"/>	0
1656645411	Bushnell	Bolle	Bolle Molly 11804	0	11804				Ladies	02/10/2015	<input type="checkbox"/>	0
1255	Dunelm	Animal	RETRO 231	2		51x18x135	C2	Plastic Rim	Unisex	13/02/2015	<input type="checkbox"/>	0
1656645250	Dunelm	Universal	Universal Chicago	-1	Chicago	51x20x	2		Gents	15/10/2015	<input type="checkbox"/>	0
1656645310	Inspects	O'Neill	O'Neill Anso	0	Anso		113P		Unisex	03/06/2015	<input type="checkbox"/>	0
1656645307	Inspects	O'Neill	O'Neill Anso	0	Anso		109P		Unisex	05/10/2015	<input type="checkbox"/>	0
5060046230002	Mid-Optic	Calotherm	Calotherm Cleaning Cloth	-8				Rimless Face		19/10/2015	<input type="checkbox"/>	0
5060046230064	Mid-Optic	Calotherm	Caloclean Spray 25ml	11				Plastic Rim	Unisex	10/11/2015	<input type="checkbox"/>	0
1656645383	Rodenstock (U.K.)	Rocco	Rocco Sun 308	1	Sun 308	53x17x140	C		Gents	16/06/2015	<input type="checkbox"/>	0
1656645365	Rodenstock (U.K.)	Rocco	Rocco 402	1	402	54x17x	E		Unisex	19/09/2015	<input type="checkbox"/>	0
1703	Serengeti Eyewe	Animal	TRAPANI 7600	0				Plastic Rim	Unisex	10/06/2015	<input type="checkbox"/>	0
2566	Serengeti Eyewe	Animal	7048 SALTO SP	0			TAN	Metal Rim	Unisex	17/06/2015	<input type="checkbox"/>	0

Use the **Filter Selection** to help narrow down your results. You can tick the **Order** checkbox to add items to your Reorder List, and they will automatically add 1 to the **Qty** column. You can over-type this with your own quantity if needed. When the item has come back into stock, or if you have made a mistake, right-click on the relevant line and choose "**Remove from Order List**".

This page works in tandem with [How Do I View Items Sold?](#) which is detailed on the next page.

How Do I View Items Sold?

To view Items Sold Recently, under **Stock**, click to **Stock Order List**. Click **Add Items** and choose **View Items Sold Recently**. The screen below will be shown:



The screenshot shows a software window titled "Add To Order List" with a sub-header "Stock Items Sold Within Date Range". The window includes a "Sales Date Range" section with "From" and "To" date pickers set to 06/08/2016 and 06/09/2016. To the right are dropdown menus for "Sales. Group", "Supplier", "Brand", "Frame Type", and "Frame Gender", all set to "All". Below this is a table with the following columns: Supplier, Brand, Description, Qty Sold, Stock Qty, Model, Size, Colour, Type, Gender, Order, and Order Qty. The table lists various eyewear items from suppliers like Continental Eyewear, Dunelm, and Universal. The first row is highlighted in orange.

Supplier	Brand	Description	Qty Sold	Stock Qty	Model	Size	Colour	Type	Gender	Order	Order Qty
Continental Eyewear	Animal	MATRIX 822	1.00	0.00		49x15x130	ROSE	Plastic Rim Fram	Ladies	<input type="checkbox"/>	0
Continental Eyewear	Cameo	CAMEO SOPHIE	1.00	0.00	SOPHIE	52x17x130	BROWN	Metal Rim Frame	Ladies	<input type="checkbox"/>	0
Dunelm	Meridian	Meridian Naples	1.00	0.00	Naples	54x17x130	2		Ladies	<input type="checkbox"/>	0
Dunelm	Universal	Universal San Diego	1.00	0.00	San Diego	52x17x135	2		Ladies	<input type="checkbox"/>	0
Dunelm	Meridian	Meridian Rovigo	1.00	-1.00	Rovigo	54x17x140	1		Gents	<input type="checkbox"/>	0
Dunelm	Animal	Dunelm Spec Cord	1.00	6.00				Plastic Rim Fram	Unisex	<input type="checkbox"/>	0
Dunelm	Euroflex	Euroflex 2043	1.00	0.00	2043	55x19x140	1		Gents	<input type="checkbox"/>	0
Dunelm	Universal	Universal Tahoe	1.00	0.00	Tahoe	53x16x135	1		Ladies	<input type="checkbox"/>	0
Dunelm	Chantelle	Chantelle 957	1.00	0.00	957	46x91x612	1		Ladies	<input type="checkbox"/>	0
Dunelm	Universal	Universal Albuquerque	1.00	0.00	Albuquerque	52x18x135	1		Ladies	<input type="checkbox"/>	0
Dunelm	Chantelle	Chantelle 917	1.00	0.00	917	48x15x130	2		Ladies	<input type="checkbox"/>	0
Dunelm	Chantelle	Chantelle 947	1.00	0.00	947	48x15x130	2		Ladies	<input type="checkbox"/>	0
Dunelm	Whizz Kids	Whizz Kids Tribe	1.00	0.00	Tribe	46x16x120	2		Children	<input type="checkbox"/>	0
Dunelm	Meridian	MERIDIAN PADOVA	1.00	-1.00		53x17x135	C1	Metal Rim Frame	Unisex	<input type="checkbox"/>	0
Dunelm	Universal	Universal Caroon	1.00	0.00	Caroon	55x18x140	2		Gents	<input type="checkbox"/>	0

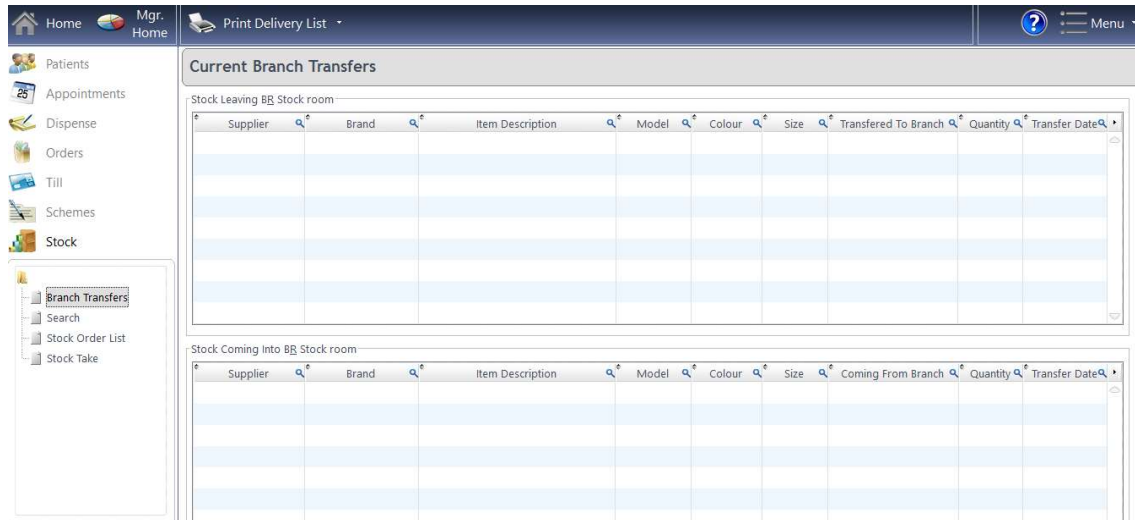
The list shows items from the last month by default, but you can adjust the **Sales Date Range**. Customise your results using the drop-down menus just to the right of the date picker.

You can tick the **Order** checkbox to add items to your Reorder List, and they will automatically add 1 to the **Qty** column. You can over-type this with your own quantity if needed.

When you have finished your work, press **Add to Order List**, or if you wish to discard your changes / were just browsing, click **Cancel**.

How Do I Transfer Items between branches?

If you use FLEX RDP, our multi-site solution, you can transfer stock items between branches and a “Stock Room” (essentially another branch). 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.

How Do I see Stock 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

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

Still need a hand? Call us on **0845 313 0233**