



Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Business Intelligence

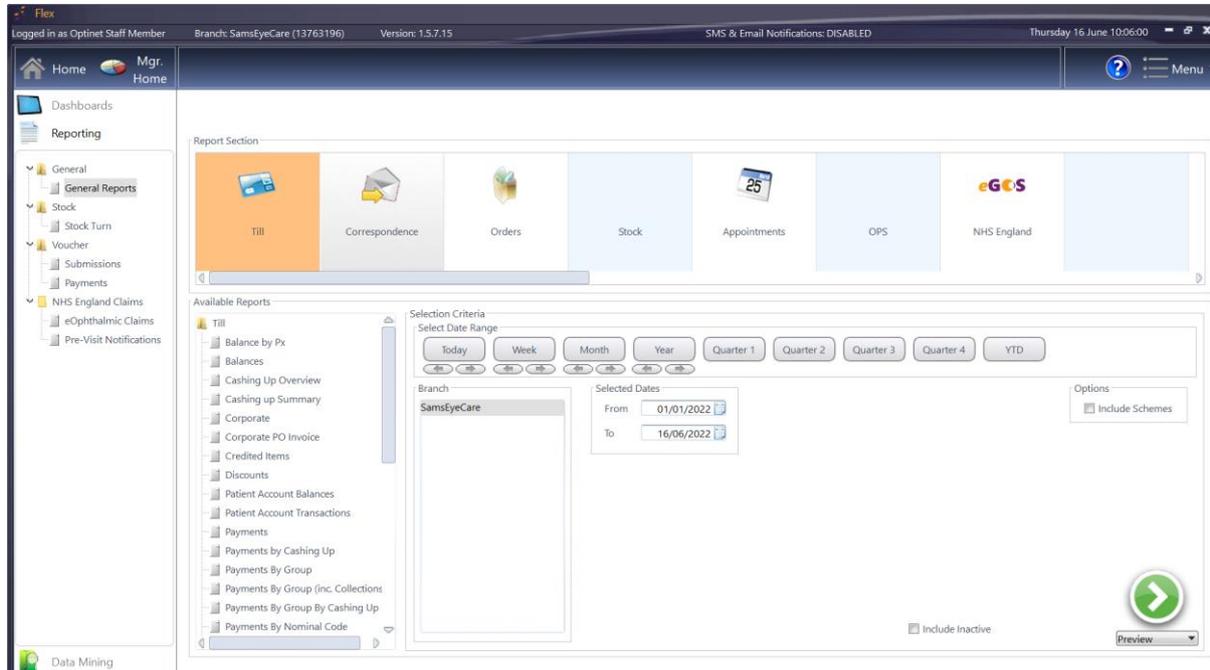
User Guide

Contents

Overview	3
General Reports.....	3
Dashboards.....	3
Data Mining	3
Till Reports	4
Type of Reports.....	5
Summary	6
Detailed	6
Correspondence Report.....	7
Orders Report	8
Contact lens	8
Contact Lens Collection.....	8
Stock Reporting	9
All Stock Valuation	9
Frame Stock by Age	10
Frame Stock Take.....	11
Frame Stock Valuation & Solution Valuation.....	11
Stock Movement.....	12
Sundry Stock Valuation	12
Appointment Report.....	13
Stock Turn	14
Voucher	15
Submissions & Payments	15
NHS ENGLAND	15

Overview

Business Intelligence gives access to a wide range of reports. The screen below will show the various areas which can be reported on.



General Reports

These are the reports shown in the main screen of business intelligence and are broken down into sections, for example, "Till", "Correspondence", "Orders", "Stock" and "Appointments".

These reports can be run to give information by a specific day, Week, Month, Year, Quarter 1, Quarter 2, Quarter 3, Quarter 4, and Year To Date.

Each report may offer further choices to select depending on the type of report being run.

Dashboards

(This is covered in a separate manual) These reports will show an overview of how your business is doing, reflecting the patient journey through FLEX in graph format.

Data Mining

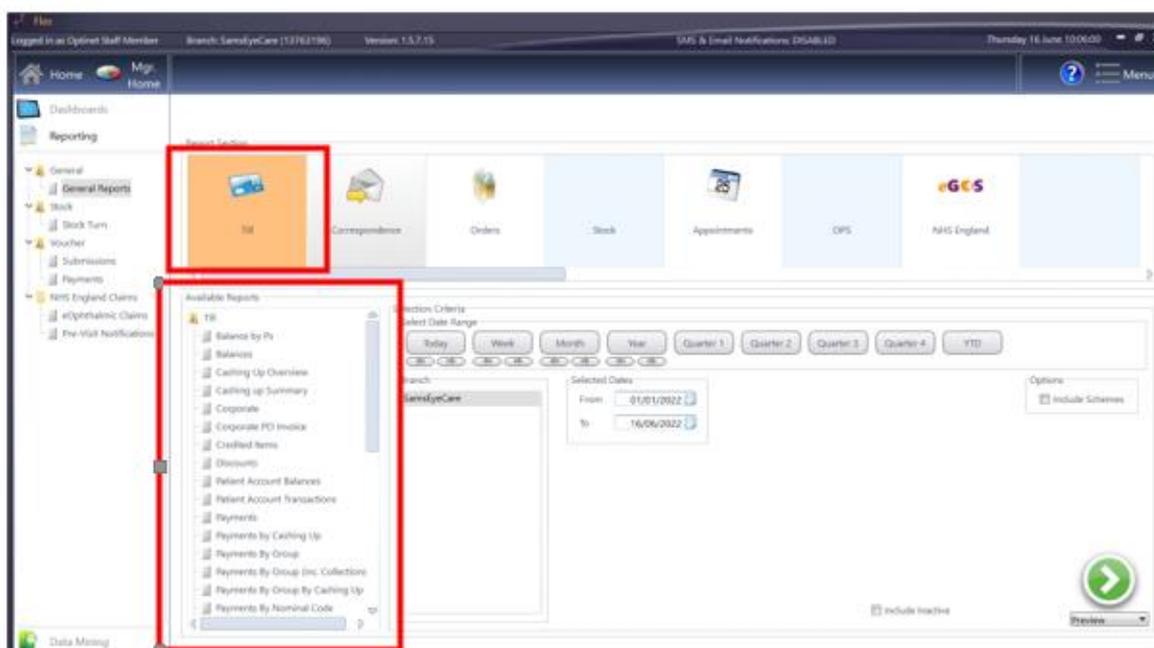
(This is covered in a separate manual) However, this offers the ability to drill down into your patient database to identify important trends, analytics, and patient information.

Till Reports

This suite of reports will show sales, payments report, details on vouchers, refunds, credits, discounts, and everything needed for VAT and Accountancy.

To select the Till reports

- Click on the “**Till**” square at the top of the screen, then select from the list below.



- You will see there is a scroll bar within the list of reports to show there are more available.
- Click on the report you want to run
- By selecting a report such as **Balance by PX**, you will be able to then...
- Select the time frame you are wanting to look at.
 - This can be done by clicking on any of the buttons for **Today, Week, Month** etc
- If only wanting a specific single date, use the **Selected Dates** area.
- When your selections are complete, click on the green circle with a white arrow.
- The Data will be produced on the screen for viewing before printing out. (As below)

Px Ref	Name	Sales	Payments	Balance
2234	Allitt, Paul (Mr)	1,202.00	910.00	292.00
13533	Barlow, Anne (Mrs)	750.00	200.00	550.00
11486	Betts, Francis (Mr)	176.71	137.61	39.10
5006	Boby, Alan (Mr)	50.00	0.00	50.00
12449	Bowler, Christopher (Mr)	200.81	136.51	64.30
15132	Brain, Nicola (Miss)	585.00	250.00	335.00
13561	Buchanan, Beverley (Mrs)	210.71	21.71	189.00
3331	Burke, Rosy (Mrs)	1,185.00	595.00	590.00
8583	Catlin, Suzie (Mrs)	1,631.00	1,116.00	515.00
11018	Creed, Olivia (Miss)	218.21	179.11	39.10
13546	Cross, Adam (Master)	131.71	92.61	39.10
184	Cullen, Anne (Mrs)	1,612.00	1,483.00	129.00
15896	Davies, Andrew (Mr)	1,583.09	700.00	883.09
14343	Desmond, Daniel (Mr)	936.50	851.50	85.00

(This one is an example of **Balance by PX**)

- o An option to print will be on the top left of the screen.

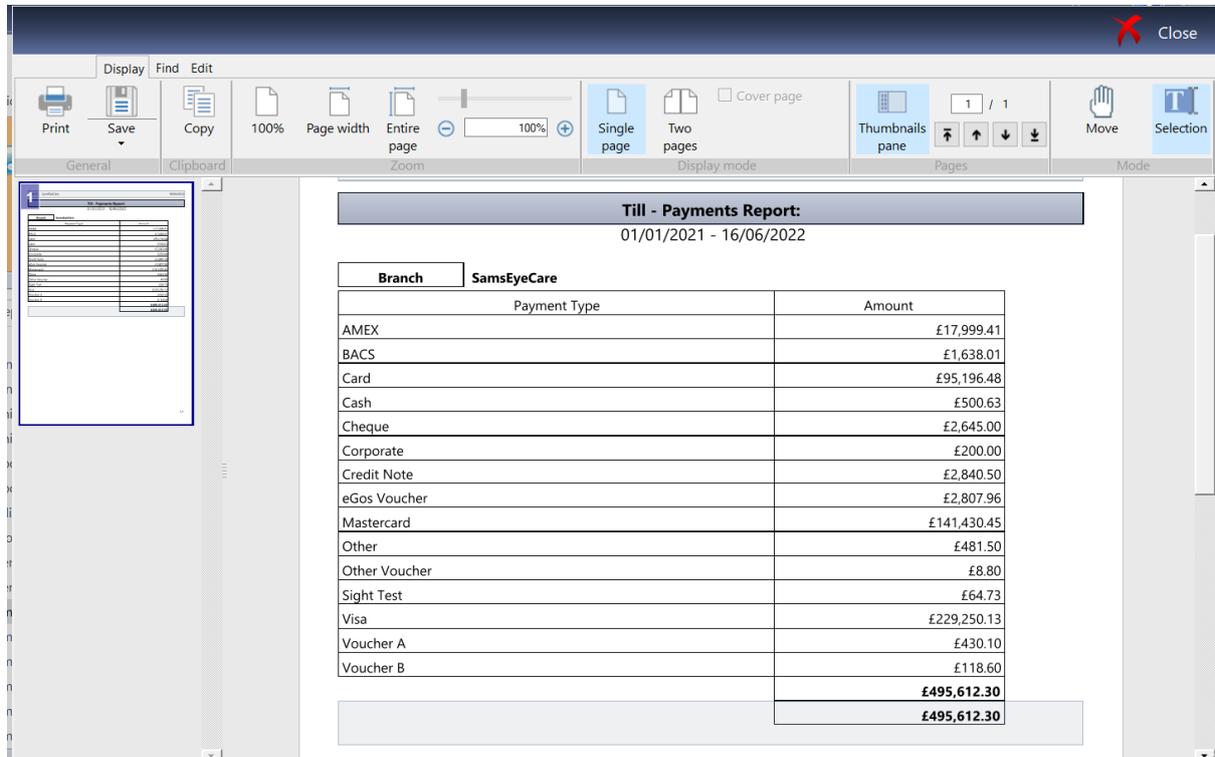
An example of a variation to the report selection criteria would be for the **Payments** report as below. This will not only allow a date selection but a payment type.

Type of Reports

With this report when it is run, there will be two options to select.

Summary

Will give a breakdown of payment methods and amounts, which will usually be a one page report.

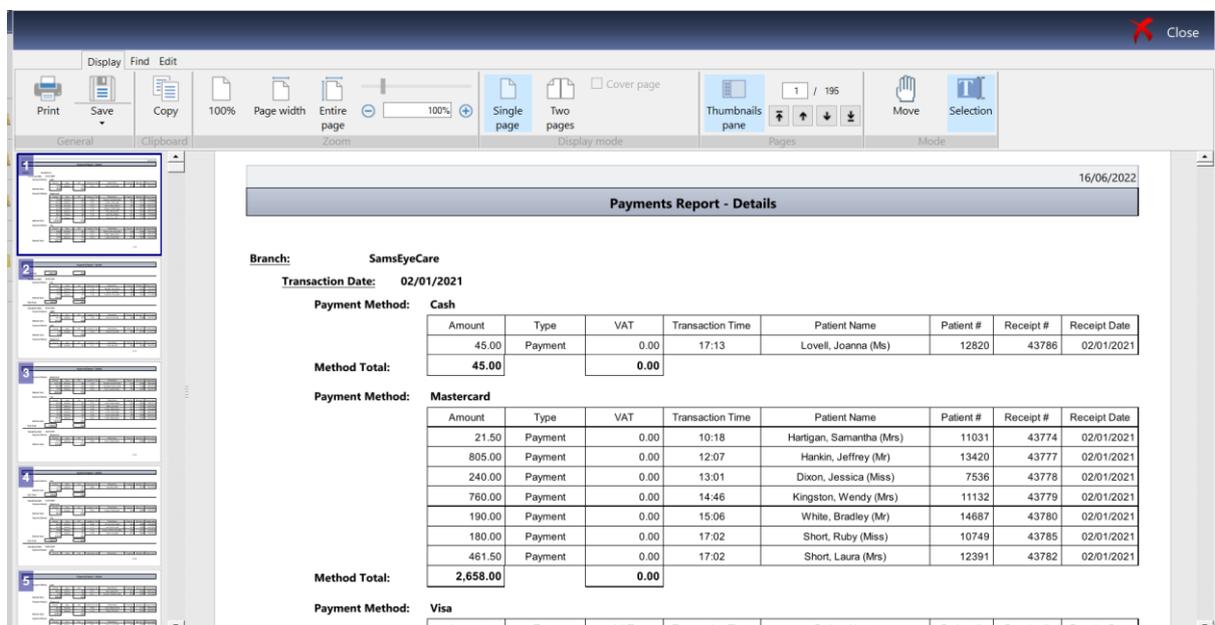


Till - Payments Report:	
01/01/2021 - 16/06/2022	
Branch	SamsEyeCare
Payment Type	Amount
AMEX	£17,999.41
BACS	£1,638.01
Card	£95,196.48
Cash	£500.63
Cheque	£2,645.00
Corporate	£200.00
Credit Note	£2,840.50
eGos Voucher	£2,807.96
Mastercard	£141,430.45
Other	£481.50
Other Voucher	£8.80
Sight Test	£64.73
Visa	£229,250.13
Voucher A	£430.10
Voucher B	£118.60
	£495,612.30
	£495,612.30

Detailed

Will give you an in-depth report, showing the payment methods, Patient names, their number, receipt number and date together with total amounts.

This very possibly will be over a number of pages as shown below.

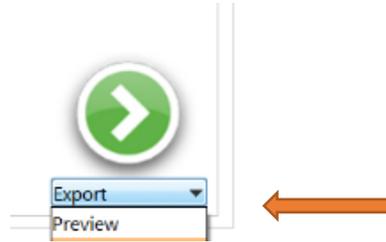


Payments Report - Details		16/06/2022																																																																
Branch: SamsEyeCare																																																																		
Transaction Date: 02/01/2021																																																																		
Payment Method:	Cash																																																																	
	<table border="1"> <thead> <tr> <th>Amount</th> <th>Type</th> <th>VAT</th> <th>Transaction Time</th> <th>Patient Name</th> <th>Patient #</th> <th>Receipt #</th> <th>Receipt Date</th> </tr> </thead> <tbody> <tr> <td>45.00</td> <td>Payment</td> <td>0.00</td> <td>17:13</td> <td>Lovell, Joanna (Ms)</td> <td>12820</td> <td>43786</td> <td>02/01/2021</td> </tr> </tbody> </table>	Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date	45.00	Payment	0.00	17:13	Lovell, Joanna (Ms)	12820	43786	02/01/2021																																																	
Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date																																																											
45.00	Payment	0.00	17:13	Lovell, Joanna (Ms)	12820	43786	02/01/2021																																																											
Method Total:	45.00	0.00																																																																
Payment Method:	Mastercard																																																																	
	<table border="1"> <thead> <tr> <th>Amount</th> <th>Type</th> <th>VAT</th> <th>Transaction Time</th> <th>Patient Name</th> <th>Patient #</th> <th>Receipt #</th> <th>Receipt Date</th> </tr> </thead> <tbody> <tr> <td>21.50</td> <td>Payment</td> <td>0.00</td> <td>10:18</td> <td>Hartigan, Samantha (Mrs)</td> <td>11031</td> <td>43774</td> <td>02/01/2021</td> </tr> <tr> <td>805.00</td> <td>Payment</td> <td>0.00</td> <td>12:07</td> <td>Hankin, Jeffrey (Mr)</td> <td>13420</td> <td>43777</td> <td>02/01/2021</td> </tr> <tr> <td>240.00</td> <td>Payment</td> <td>0.00</td> <td>13:01</td> <td>Dixon, Jessica (Miss)</td> <td>7536</td> <td>43778</td> <td>02/01/2021</td> </tr> <tr> <td>760.00</td> <td>Payment</td> <td>0.00</td> <td>14:46</td> <td>Kingston, Wendy (Mrs)</td> <td>11132</td> <td>43779</td> <td>02/01/2021</td> </tr> <tr> <td>190.00</td> <td>Payment</td> <td>0.00</td> <td>15:06</td> <td>White, Bradley (Mr)</td> <td>14687</td> <td>43780</td> <td>02/01/2021</td> </tr> <tr> <td>180.00</td> <td>Payment</td> <td>0.00</td> <td>17:02</td> <td>Short, Ruby (Miss)</td> <td>10749</td> <td>43785</td> <td>02/01/2021</td> </tr> <tr> <td>461.50</td> <td>Payment</td> <td>0.00</td> <td>17:02</td> <td>Short, Laura (Mrs)</td> <td>12391</td> <td>43782</td> <td>02/01/2021</td> </tr> </tbody> </table>	Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date	21.50	Payment	0.00	10:18	Hartigan, Samantha (Mrs)	11031	43774	02/01/2021	805.00	Payment	0.00	12:07	Hankin, Jeffrey (Mr)	13420	43777	02/01/2021	240.00	Payment	0.00	13:01	Dixon, Jessica (Miss)	7536	43778	02/01/2021	760.00	Payment	0.00	14:46	Kingston, Wendy (Mrs)	11132	43779	02/01/2021	190.00	Payment	0.00	15:06	White, Bradley (Mr)	14687	43780	02/01/2021	180.00	Payment	0.00	17:02	Short, Ruby (Miss)	10749	43785	02/01/2021	461.50	Payment	0.00	17:02	Short, Laura (Mrs)	12391	43782	02/01/2021	
Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date																																																											
21.50	Payment	0.00	10:18	Hartigan, Samantha (Mrs)	11031	43774	02/01/2021																																																											
805.00	Payment	0.00	12:07	Hankin, Jeffrey (Mr)	13420	43777	02/01/2021																																																											
240.00	Payment	0.00	13:01	Dixon, Jessica (Miss)	7536	43778	02/01/2021																																																											
760.00	Payment	0.00	14:46	Kingston, Wendy (Mrs)	11132	43779	02/01/2021																																																											
190.00	Payment	0.00	15:06	White, Bradley (Mr)	14687	43780	02/01/2021																																																											
180.00	Payment	0.00	17:02	Short, Ruby (Miss)	10749	43785	02/01/2021																																																											
461.50	Payment	0.00	17:02	Short, Laura (Mrs)	12391	43782	02/01/2021																																																											
Method Total:	2,658.00	0.00																																																																
Payment Method:	Visa																																																																	
	<table border="1"> <thead> <tr> <th>Amount</th> <th>Type</th> <th>VAT</th> <th>Transaction Time</th> <th>Patient Name</th> <th>Patient #</th> <th>Receipt #</th> <th>Receipt Date</th> </tr> </thead> </table>	Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date																																																									
Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date																																																											

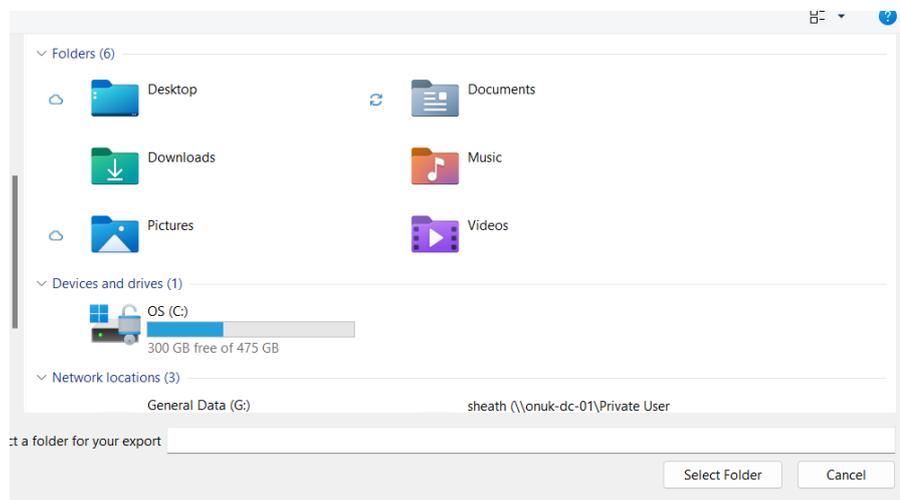
Note

There is also the ability to export the report that has been run.

- Select **Export** under the green circle with the arrow.



- Then chose the folder to export the report to.



- Flex will then confirm that the report has been exported.
- This can then be opened from the location saved.

Correspondence Report

This report will give information about any activity in relation to Email or SMS that have been sent.

Again, select the time frame you are want to report and then click the green circle.

There will be an option to print a summary or a detailed report here too.

The summary will show the number of correspondences that have been sent. Details will show: The date and time the email or SMS was sent will be listed together with the patient's name.

Orders Report

Here contact lens reports can be run.

Contact lens

- Make date selection
- Click on the green circle to run the report (remember to select preview or export)
- There is no option for the summary on this report, so you will get full details.

Branch: SamsEyeCare 16/06/2022

Contact Lens Order Report

Company Cooper Vision

Order #	7,483	created on	15/12/2021
Patient	Heath, Sam (Miss)		
Type			
Required By			
Notes			

Deliver To	Write supplier reference below
Colnet Malvern WV14 2AZ	

Pack Size	Order Qty	Lens Description	BOZR	TD	Sph	Cyl	Axis	Add
R		Bifinity XR Toric	8.4	14.2	Plano			
Design Options								
L		Bifinity XR Toric	8.4	14.2	Plano			
Design Options								

Order #	7,484	created on	12/01/2022
Patient	Heath, Sam (Miss)		
Type			
Required By			

Deliver To	Write supplier reference below

Contact Lens Collection

This report will show, each patients contact lens order which is ready for collection. This is based on the due date which will have been entered when processing the order in flex.

Branch: SamsEyeCare 16/06/2022

Contact Lenses Due For Collection

Supplier : Johnson & Johnson

Patient : 15951 Heath, Sam (Miss)

Next Sight Exam Due : 05/04/2023 **Next Aftercare Due :** 22/03/2023

Branch	Collection Due	Eye	Lens	BOZR	TD	BVP	Cyl	Axis	Add	BOZR 2	BVP 2
SamsEyeCare	15/06/2022	Right	1-DAY ACUVUE MOIST (minus powers)	8.50	14.30		+0.25	6	+2.00		
SamsEyeCare	15/06/2022	Left	1-DAY ACUVUE MOIST (minus powers)	8.50	14.30		+0.25	6	+2.00		

Solutions : Contact Lens solution **General Notes :**

Stock Reporting

There are several reports which can give you details of your stock in practice.

- **All Stock Valuation**
- **Frame Stock by Age**
- **Frame Stock Take**
- **Frame Stock Valuation**
- **Solution Stock Valuation**
- **Stock Movement**
- **Sundry Stock Valuation**

All Stock Valuation

- When selecting All Stock, FLEX will give the option to select *all* of the sales groups or just specific ones.
- If there is more than one branch, branch selection is required.
- Select a date the stock figures are needed to.
- Quantity will all the report to only show items that are over certain amount if needed.
- Supplier and Gender can be selected too. All will be selected by default otherwise click on the ones you want to report on. (To select more than one hold the Ctrl button down and click on all required)
- Click green button to run.

Branch: SamsEyeCare 16/06/2022

All Stock Valuation
Up To : 16/06/2022

NO SUPPLIER

SAMSEYECARE														
Barcode	Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)
123550		Contact Lens solution				3	0.00	£0.00	0.00	0.00	£25.00	75.00	100.00%	100.00%
123549		5555				1	0.00	£0.00	0.00	0.00	£0.00	0.00	0.00%	0.00%
3574660123425		Aveeno				49	0.00	£0.00	0.00	0.00	£10.00	490.00	100.00%	100.00%
Branch Totals						53		£0.00		£0.00		£565.00		
Supplier Totals						53		£0.00		£0.00		£565.00		

MAUI JIM UK LIMITED

SAMSEYECARE														
Barcode	Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)
123552	Maui Jim	Maui Jim	MJ02123	purple/red	52x18x52	1	0.00	£0.00	0.00	0.00	£350.00	350.00	100.00%	100.00%
Branch Totals						1		£0.00		£0.00		£350.00		
Supplier Totals						1		£0.00		£0.00		£350.00		

Include 'Display Only' Include 'No supplier' Preview

Frame Stock by Age

This report will a report to be run to find out how long stock has been in practice.

- Select the stock age range, ie between 1 and 6 months
- Quantity
- Supplier
- Gender
- Run the report

- Details on Brand, Cost, Barcode, Description, Colour, Size, Model, Dated added and age in months will be listed against each supplier.

Branch: SamsEyeCare 16/06/2022

Stock Age Report

Branch : SamsEyeCare

Supplier :

Brand	Cost	Barcode	Description	Colour	Size	Model	DateAdded	Age (Months)
	20.00	13	face				11/03/2022	3

Supplier : Maui Jim UK Limited

Brand	Cost	Barcode	Description	Colour	Size	Model	DateAdded	Age (Months)
Maui Jim	0.00	123552	Maui Jim	purple/red	52x18x52	MJO2123	24/03/2022	2

Total : 20.00

Frame Stock Take

This report will require the Quantity, supplier, and gender to be selected again as previous reports.

Frame Stock Valuation & Solution Valuation

These reports will give the option of summary or detailed report.

The summary will show Supplier, Cost, and Book Prices (If entered on FLEX) and Retail prices.

Branch: SamsEyeCare		16/06/2022		
Frame Stock Valuation (Summary)				
Branch	SamsEyeCare			
Supplier	Cost Price	Book Price	Retail Price	
Maui Jim UK Limited	£0.00	£0.00	£350.00	
Branch Total	£0.00	£0.00	£350.00	
Group Total	£0.00	£0.00	£350.00	

The detailed report will show figures together with all the details of the frame against each supplier.

Branch: SamsEyeCare		16/06/2022													
Frame Stock Valuation															
MAUI JIM UK LIMITED															
SAMSEYECARE															
Barcode	Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)	
123552	Maui Jim	Maui Jim	MJ02123	purple/red	52x18x52	1	0.00	£0.00	0.00	0.00	£350.00	350.00	100.00%	100.00%	
Branch Totals						1		£0.00		£0.00		£350.00			
Supplier Totals						1		£0.00		£0.00		£350.00			
Grand Total Qty		1	Grand Total Cost		£0.00	Grand Total Book		£0.00	Grand Total Retail		£350.00				

Branch: SamsEyeCare						16/06/2022								
Solution Stock Valuation														
NO SUPPLIER														
SAMSEYECARE														
Barcode	Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)
123549		5555				1	0.00	£0.00	0.00	0.00	£0.00	0.00	0.00%	0.00%
123550		Contact Lens solution				3	0.00	£0.00	0.00	0.00	£25.00	75.00	100.00%	100.00%
Branch Totals						4		£0.00		£0.00		£75.00		
Supplier Totals						4		£0.00		£0.00		£75.00		
Grand Total Qty		4	Grand Total Cost		£0.00	Grand Total Book		£0.00	Grand Total Retail		£75.00			

Stock Movement

With this report there are various options which can be chosen to track the movement of stock within branch.

For example, if you have more than one branch it will detail what you have transferred between branches. Any manual stock quantity adjustments etc

Available Reports

- Stock
 - All Stock Valuation
 - Frame Stock by Age
 - Frame Stock Take
 - Frame Stock Valuation
 - Solution Stock Valuation
 - Stock Movement**
 - Sundry Stock Valuation

Selection Criteria

Select Date Range

Today Week Month Year Quarter 1 Quarter 2 Quarter 3 Quarter 4 YTD

Branch

SamsEyeCare

Selected Dates

From 01/01/2021

To 16/06/2022

Movement Reason

- Branch Transfer Cancelled
- Branch Transfer In
- Branch Transfer Out
- Delivery From Supplier
- Initialisation
- Manual Adjustment Down
- Manual Adjustment Up
- Released from Reservation
- Reserved For Patient
- Returned To Supplier
- Stock Take - OK
- Stock Take Correction - Over
- Stock Take Correction - Under
- Written Off

Sundry Stock Valuation

This report will need quantity and supplier (s) selected. Also there will be an option for summary or detailed report types.

Appointment Report

This report enables the diary for a specific time frame to be printed out.

- Click on Daily Reports
- Select time frame, either by clicking on relevant button or selecting the date(s)

Example of the diary print is below:

Branch: SamsEyeCare					16/06/2022
Appointment Diary					
Date: Friday 24 June 2022			Room Name: Optom Room 3		
Day Notes :					
Start Time	Patient #	Patient Name	Age	Reason	Telephone
09:00 AM					
09:30 AM	15951	Heath, Sam (Miss)	22	NHS Sight Test	- 07739488794 -
09:50 AM					
10:00 AM					
10:30 AM					
11:00 AM	2000	Smith, Adam (Mr)	47	NHS Sight Test	01548800000 07940700000 07744004770

Additional Reports

If using **OPS** two reports are available.

1. Items for Collection
2. Outstanding Payments

If using **eGOS**

- eGOS Claims can be reported on.
- Select date range
- Claim Type
- Select all the status's you want to report on.

Stock Turn

To the left of the reports screen which we have covered. There will be report called Stock Turn.

This is an analysis of relative stock sell-through, describing trends for selected categories of frames per quarter.

The categories for frames are comprised of Supplier, Frame Gender, and Frame material.

The quarterly sales are projected to an annual total for each frame within a category. The average number of units sold for a frame in this category is then calculated – giving the “Stock Turn” figure.

The probability is then calculated using the “stock turn” figure multiplied by the average total profit figure for this frame category.

Finally, the ratio of cost to profitability is calculated. The ratio (relative profitability) can be utilised to compare stock sell through. The higher the figure the better.

At the top of the screen there is a tab entitled “Compare Previous Quarter”, click on this to make comparisons.

Current Quarter		Compare Previous Quarter				
SubCategory	Stock Turn	Total Cost	Avg Profit Per Piece	Number of Stock	Profitability	Rate
Maul Jim UK Limited / Female / Plastic	8.00	£0.00	£700.00	1	£5,800.00	0.00
MARCHON / Unisex / Full Rim	8.00	£218.00	£552.00	1	£4,738.00	21.91
MARCHON / Female / Full Rim	8.00	£0.00	£-129.00	1	£0.00	0.00
Anglo American / Female / Plastic	4.00	£250.00	£0.00	1	£0.00	0.00

Description	Qty Sold	Cost	Retail	Total Cost	Total Retail	Margin (Avg)	Margin %	Annualised Sales
Anglo American / Female / Plastic								
Rayban CT	1.00	£250.00	£250.00	£250.00	£250.00	£0.00		4.00
Projected Stock Turn 4	1.00	£250.00	£250.00	£250.00	£250.00			4.00
MARCHON / Female / Full Rim								
VE2095	0.00	£129.00	£0.00	£0.00	£0.00	£-129.00		0.00
Projected Stock Turn 0	0.00	£129.00	£0.00	£0.00	£0.00			0.00
MARCHON / Unisex / Full Rim								
CK21155	2.00	£108.00	£700.00	£216.00	£1,400.00	£582.00		8.00
Projected Stock Turn 8	2.00	£108.00	£700.00	£216.00	£1,400.00			8.00
Maul Jim UK Limited / Female / Plastic								
Maul Jim	2.00	£0.00	£700.00	£0.00	£1,400.00	£700.00		8.00
Projected Stock Turn 8	2.00	£0.00	£700.00	£0.00	£1,400.00			8.00

The next report available is Vouchers.

Voucher

Submissions & Payments

This report will summaries all voucher submission information. This will list the till date, receipt number that was processed, the type of voucher, the value of the voucher, its status and the patient's name.

There are filters at the top of this screen to get the relevant information. For example date selection. This will be the date you want to run your voucher submissions up until. Type will be if it's a sight test or a voucher. The status will be pending, Ready to Go or Submitted.

The payments will be the same format.

NHS ENGLAND

If using eGOS, the NHS England Claims will also be accessible through the **NHS ENGLAND** report below Voucher.

Example of the data selections which can be made within these reports are as per screen shots 1 and 2.

The image shows a navigation menu on the left with the following items: Voucher, Submissions, Payments, NHS England Claims (highlighted), eOphthalmic Claims, and Pre-Visit Notifications. To the right are two panels, labeled 1 and 2, showing filter options for these reports.

Panel 1: eOphthalmic Claims

- Claim Reference Search: [Text Input]
- Claim Dates: From 09/06/2022, To 16/06/2022, Refresh all claims
- Claim Type: GOS1, GOS3, GOS3_VO, GOS4, GOS5
- Status: Finished, Unfinished (selected)
- Status List: Accepted, Awaiting Review, Cancelled, Closed, Data Entry In Progress, Draft, Error, Failed Validation, Ready For Claim, Rejected, Sent For Payment, Submitted, Terminated, Validated, Withheld

Panel 2: Pre-Visit Notification

- Filter By Date: From 16/03/2022, To 16/06/2022, Refresh Table, Refresh PVNs (NHS Servers)
- Filter By Venue: NO VENUE ASSIGNED
- Status List: Accepted, Awaiting Review, Cancelled, Closed, Data Entry In Progress, Draft, Error, Failed Validation, Ready For Claim, Rejected, Sent For Payment, Submitted, Terminated, Validated, Withheld