



Get the most out of

**FLEX**

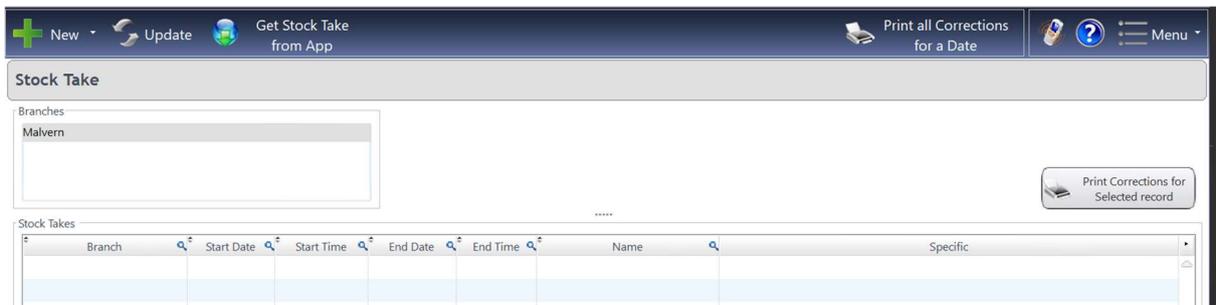
ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide Stock Take

## Stock Take

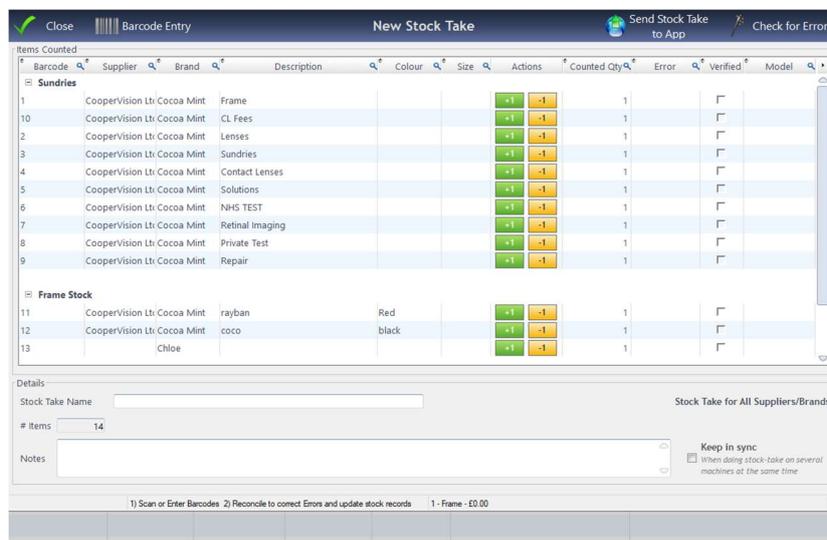
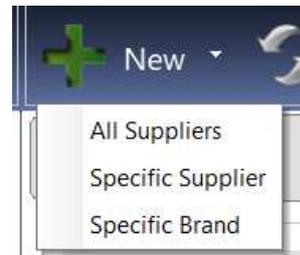
The Stock Take Screen lists any previous Stock Takes that have been done within Flex. Remember that when scanning or adding barcodes manually, the product will need to have been added to stock previously.

The first stock take which is done on FLEX will present a blank screen as below.



## New Stock Take

- To start a new Stock Take, Click on the **+** New
- Select from one of the three options
- The new stock take screen will now be ready to Populate.
- Enter a Stock Take Name in the bottom portion of the screen
- Click on Barcode Entry
- If using a scanner, start scanning your stock, which will then appear in the body of the screen.
- If you are not using a scanner, enter the barcode manually.
- When Barcode is entered, click confirm. The system will check with stock to be sure it's a valid Barcode.
- Once the stock take is being populated, the Actions column will allow you to increase or decrease the amount of each item in increments of one by clicking on the green or yellow buttons.



- Click on Close to come out of the stock take, FLEX will then ask the following:



This process will update your stock records with the Counted Qty. Would you like to complete and finish this Stock Take?

Yes, It's finished

No, I'm coming back to it

No, I want to carry on

- Before closing the stock take, Click on **Check for Errors**
- FLEX will ask if you have counted and entered every item of stock?
- Yes, Check for Errors will do just that.

Screen shot below will show what to expect if there are errors.

- The **Counted Qty** can be manually over-written. If it then corresponds with the Stock count on FLEX, the red illumination will go out. If there is still an **Error** but you have ticked the **Verified** box, the light will also go out.

**New Stock Take**

Barcode	Supplier	Brand	Description	Colour	Size	Counted Qty	Error	Verified	Model
<b>Sundries</b>									
1			Frame			+1 -1	1 Over Stock (1)	<input type="checkbox"/>	
2			Lenses			+1 -1	3 Over Stock (3)	<input type="checkbox"/>	
4			Contact Lenses			+1 -1	1 Over Stock (1)	<input type="checkbox"/>	
5			Solutions			+1 -1	2 Over Stock (2)	<input type="checkbox"/>	
6			NHS TEST			+1 -1	1 Over Stock (1)	<input type="checkbox"/>	
7			Retinal Imaging			+1 -1	3 Over Stock (3)	<input type="checkbox"/>	
<b>Frame Stock</b>									
00123546	Anglo American	Ray Ban	Rayban C1	Black	52x52x52	+1 -1	0	<input type="checkbox"/>	RayBan
11			rayban	Red		+1 -1	0	<input type="checkbox"/>	
12	CooperVision Ltd	Cocoa Mint	coco	black		+1 -1	0 Over Stock (2)	<input type="checkbox"/>	
123547	Anglo American	Ray Ban	Rayban C1	Red	54x50x55	+1 -1	0	<input type="checkbox"/>	RayBan
13		Chloe				+1 -1	0 Under Stock (1)	<input type="checkbox"/>	

Details: Stock Take Name: \_\_\_\_\_ Stock Take for All Suppliers/Brands:

# Items: 6

Notes: \_\_\_\_\_

Keep in sync:  When doing stock-take on several machines at the same time

1) Scan or Enter Barcodes 2) Reconcile to correct Errors and update stock records 7 - Retinal Imaging - £0.00

**Stock Take 17/12/2021**

Barcode	Supplier	Brand	Description	Colour	Size	Counted Qty	Error	Verified	Model
<b>Sundries</b>									
1			Frame			+1 -1	1 Over Stock (1)	<input checked="" type="checkbox"/>	
2			Lenses			+1 -1	3 Over Stock (3)	<input checked="" type="checkbox"/>	
4			Contact Lenses			+1 -1	0	<input checked="" type="checkbox"/>	
5			Solutions			+1 -1	2 Over Stock (2)	<input checked="" type="checkbox"/>	
6			NHS TEST			+1 -1	1 Over Stock (1)	<input checked="" type="checkbox"/>	
7			Retinal Imaging			+1 -1	3 Over Stock (3)	<input checked="" type="checkbox"/>	
<b>Frame Stock</b>									
00123546	Anglo American	Ray Ban	Rayban C1	Black	52x52x52	+1 -1	0	<input type="checkbox"/>	RayBan
11			rayban	Red		+1 -1	0	<input type="checkbox"/>	
12	CooperVision Ltd	Cocoa Mint	coco	black		+1 -1	0 Over Stock (2)	<input checked="" type="checkbox"/>	
123547	Anglo American	Ray Ban	Rayban C1	Red	54x50x55	+1 -1	0	<input type="checkbox"/>	RayBan
13		Chloe				+1 -1	0 Under Stock (1)	<input checked="" type="checkbox"/>	

Details: Stock Take Name: \_\_\_\_\_ Stock Take for All Suppliers/Brands:

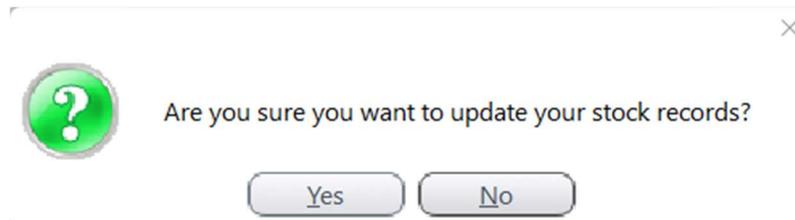
# Items: 11

Notes: \_\_\_\_\_

Keep in sync:  When doing stock-take on several machines at the same time

1) Scan or Enter Barcodes 2) Reconcile to correct Errors and update stock records

- Press **Update Stock**. The message below is shown. If you are happy with the message, press **Yes, Update Stock**. Note, before you do this, you should tick that each item has been **Verified**.
- The Stock Take can then be closed, and the final message below will be asked:



This completes the Stock Take process. It can then be **Printed** if needed.