



Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Till Button Creation User Guide

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Introduction to the Creation of Till Buttons

Optinet Helpdesk can set this up for you however, it is easy to change, and update features yourself.

Setup will have been done prior to Go Live date however this guide will detail how it can be amended going forward.

Payment Methods, NHS Vouchers, Sales Groups, Dispensing Fees, VAT

- o These will all be setup following the pre install questionnaire answers

Petty Cash Groups

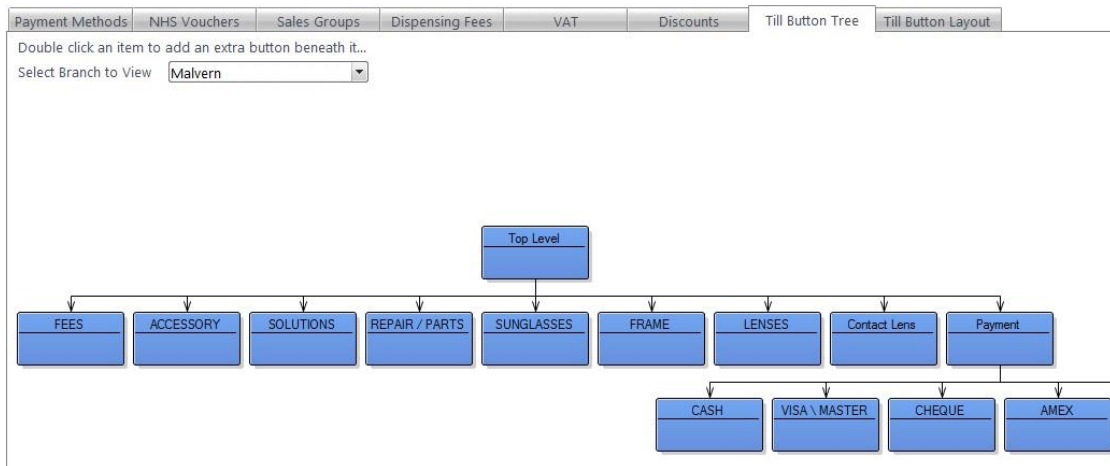
As part of the Till section of FLEX, Petty Cash is also included.

When Petty Cash' is entered onto the system, a Petty Cash Group can be chosen. This will calculate VAT automatically. Click into a new row to enter a **Description** and the **VAT Rate**.

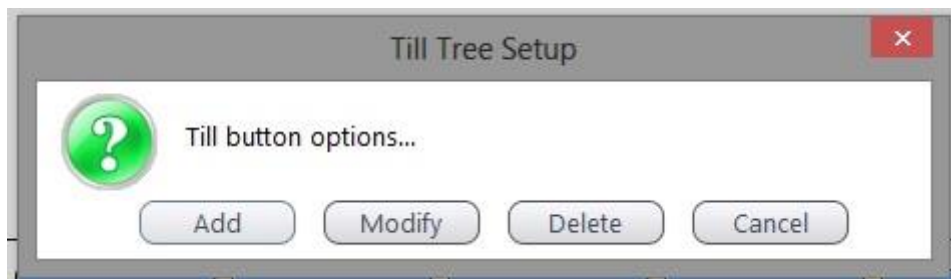
Petty Cash Group

Description	VAT Rate
Office Stationary Vatable	20.00
Canteen	0.00
Post	0.00
Misc.	0.00
Cleaner	0.00
Shop Equipment Vatable	20.00
Incentives	0.00
Welfare Vatable	20.00
Refund	20.00
Refund No VAT	0.00
Total Expenses	0.00

The **Till Button Tree** allows users to update the buttons which appear on the Till and their hierarchy. The example till tree is shown below. Whether you have multiple branches or not, you will have to select your practice from the **Select Branch to View** menu.



Double-click on a button to update its function. To add a new button, press the button on the level above where it should appear. The dialogue box below comes up:



Add / Modify: See next page: the page is broadly similar for either action.

Delete: Asks you if you really want to delete the button.

Cancel: Gets rid of the box.

- **Patient Top Up** – Allows patients to pay into an “account” much like a savings scheme.
- **Patient Account Spend** – When customer has an outstanding balance, they can pay through this option. The outstanding account balance available will appear on Till as per screenshot.
- **Price Check** – This will ask for a barcode, enter and the description, colour, size and price will come up if all these are appropriate.
- **Sell Stock Item** – Will ask for a price to be added here.
- **Take Payment** – Basically Cash, Card Etc
When setting this up make sure you choose the correct payment type you are wanting to process. I.e Card, Amex, cash etc.
- **Voucher Option** allows and NHS voucher to be assigned, or can ask the user to select one from the list upon transaction.

The screenshot shows a receipt interface with the following sections:

- Receipt Number:**
 - #: 45577
 - Branch: Malvern
- Date Details:**
 - Date: 16/12/2021
 - Time: 10:55
- Patient:**
 - Balance: £ 445.00
 - Ref #: 15951
 - Age: 21
 - Loyalty:
 - Account: £ 10.00 (highlighted with a red box)
- Staff Details:**
 - Staff: Optinet Staff Member
 - DO:
 - OO:

Button Location

- Click to **Till Button Layout**. The position number is shown and the button can be moved. (**With Caution** - These numbers can cause issues which will require helpdesk to resolve)

To refresh your buttons when you get back to the Till, press the “Top Level” button and the changes will be actioned.

Please see our separate guides for help with **Corporate** and **Loyalty**.

To make FLEX open the Till, you need to do two things:

- 1) As detailed above, create a new button with the action “Open Drawer”.
- 2) The Eject command must be entered in Menu – Setup – System - PC Settings.
- 3) This should be ASCII values separated by a +. For the EPSON TMT88V, enter 27+112+48+55+121
- 4) In Windows Control panel, make sure the receipt printer properties have “Open Drawer” function set. (Your IT contractor will be able to help with this step)