optinet™
SOFTWARE

Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Till

User Guide

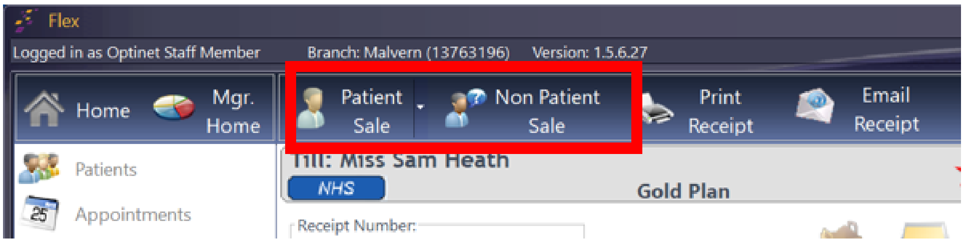
Contents

Overview of the Till

The Till on FLEX is completely customisable as is covered in the **Setup: Till Buttons** manual.

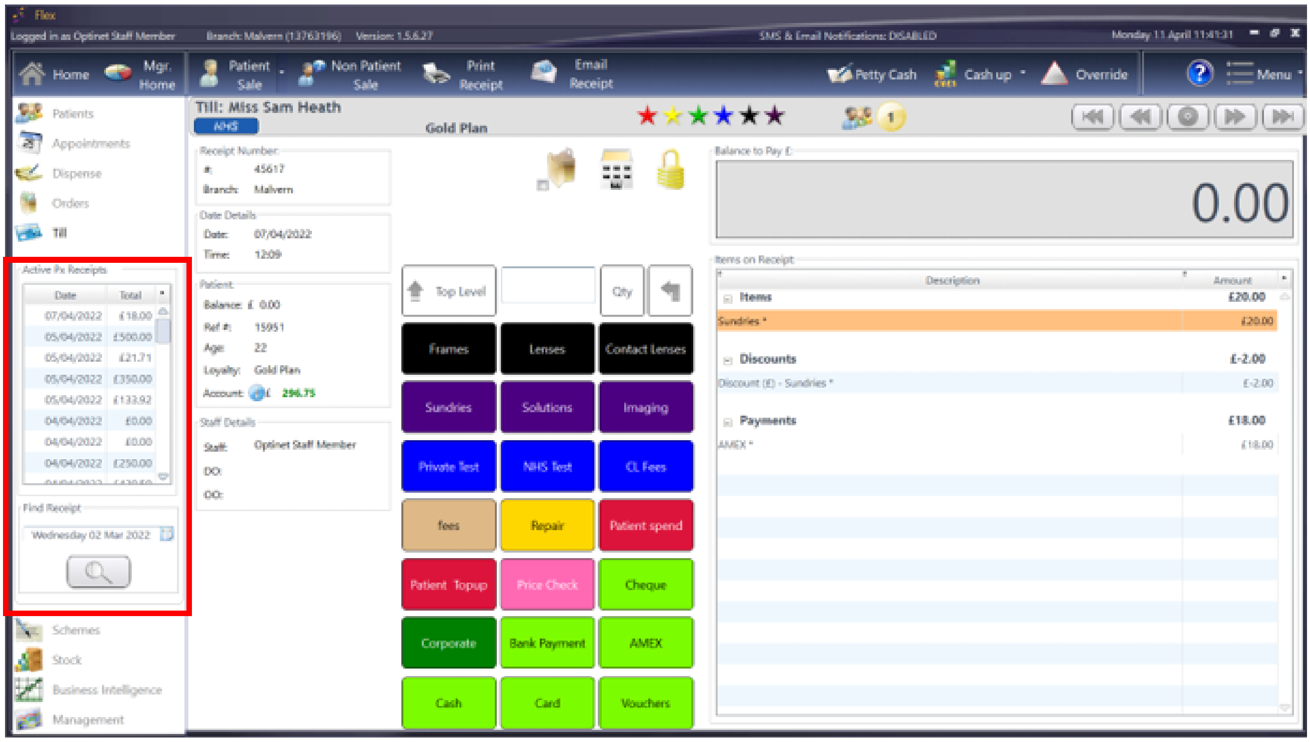
Each patient as their own "**Till**". This is accessible one in their patient record by clicking on **Till** option within the menus on the left of the screen.

There is also a **Till** option for **Non Patient sale** which is accessible from the blue bar at the top of the screen, next to **Patient Sale**. (This will be explained further in this document).



Each patient's **Till** will have a list of all their previous receipts which can be viewed on the left of the screen under **Active Px Receipts.**

There is also a **Find Receipt** facility under this list to view all receipts from a specific date for *any* customer or non-patient sale.



Till Layout

Immediately left of the till buttons there are the following:

- Receipt Number
- Branch Name
- Date and time of the receipt being generated

Patient Information

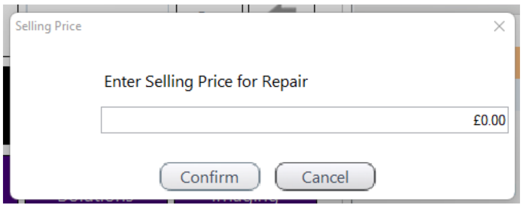
- Balance
- Reference number (Patient ID)
- Patients Age
- Any loyalty plan they may be on
- Account – Is any money that is on their account

Staff Details

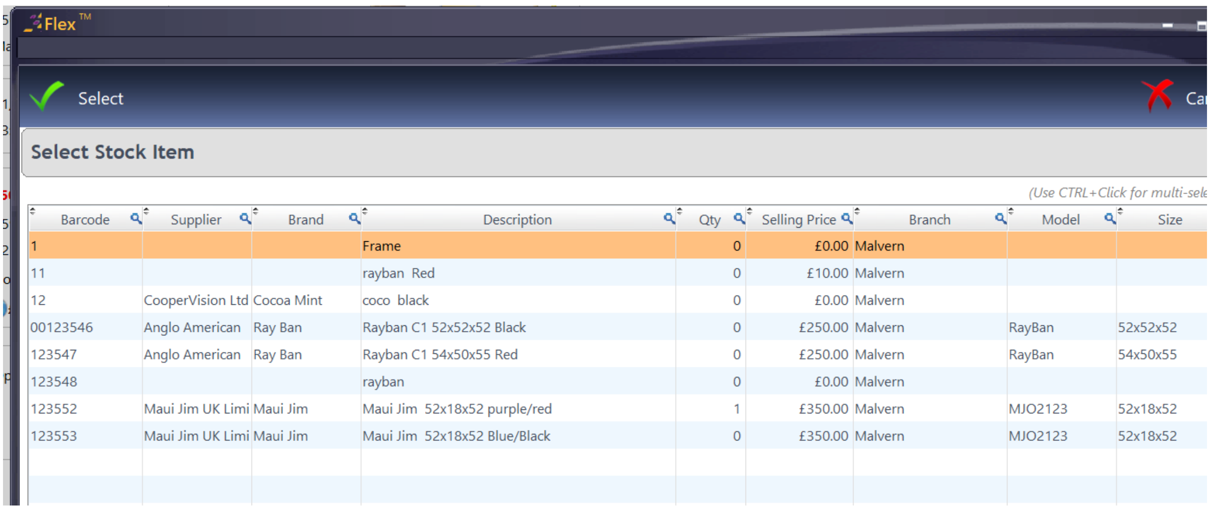
- The member of staff who has put this transaction through.

Till Buttons

- These buttons, when setup, will either require an amount to be typed in or have a list relevant to the button where items can be selected and subsequently added to the till.



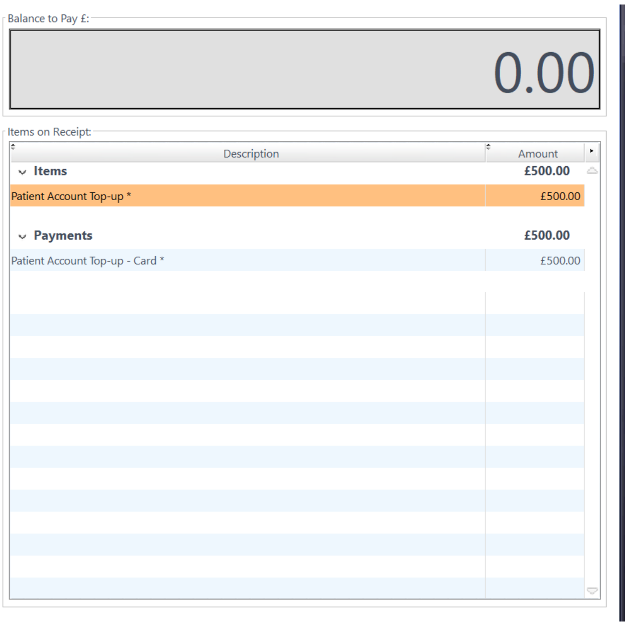
- The screenshot below is an example of the list which will be selectable.
- The stock items need to be setup with **Stock**. (Explained in separate Stock document).



- Buttons can used for several reasons. But must include payment types.
    - Cash
    - Card
    - BACs
    - Vouchers etc.
- Buttons could be setup for taking payment on account
- Spending from money collected on account
- Could have a price check button if required.

Receipt

To the right of the screen is where the breakdown of the items purchased and payment made will show.



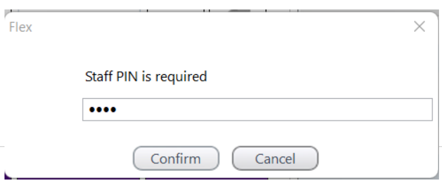
Locking and Unlocking of Receipt

At the top of the page there is a picture of a padlock.

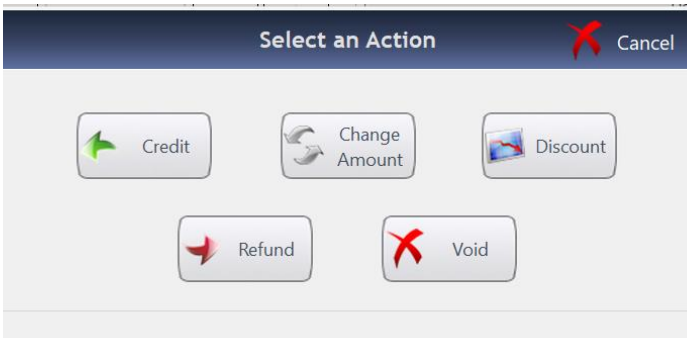
- When the receipt is active the padlock will be open. 
- When the payment has been taken the padlock will then be closed 

IF a payment needs to be refunded or a change made to items selected within the till; the padlock will first need to be opened.

- Click on the closed padlock
- Enter staff PIN number

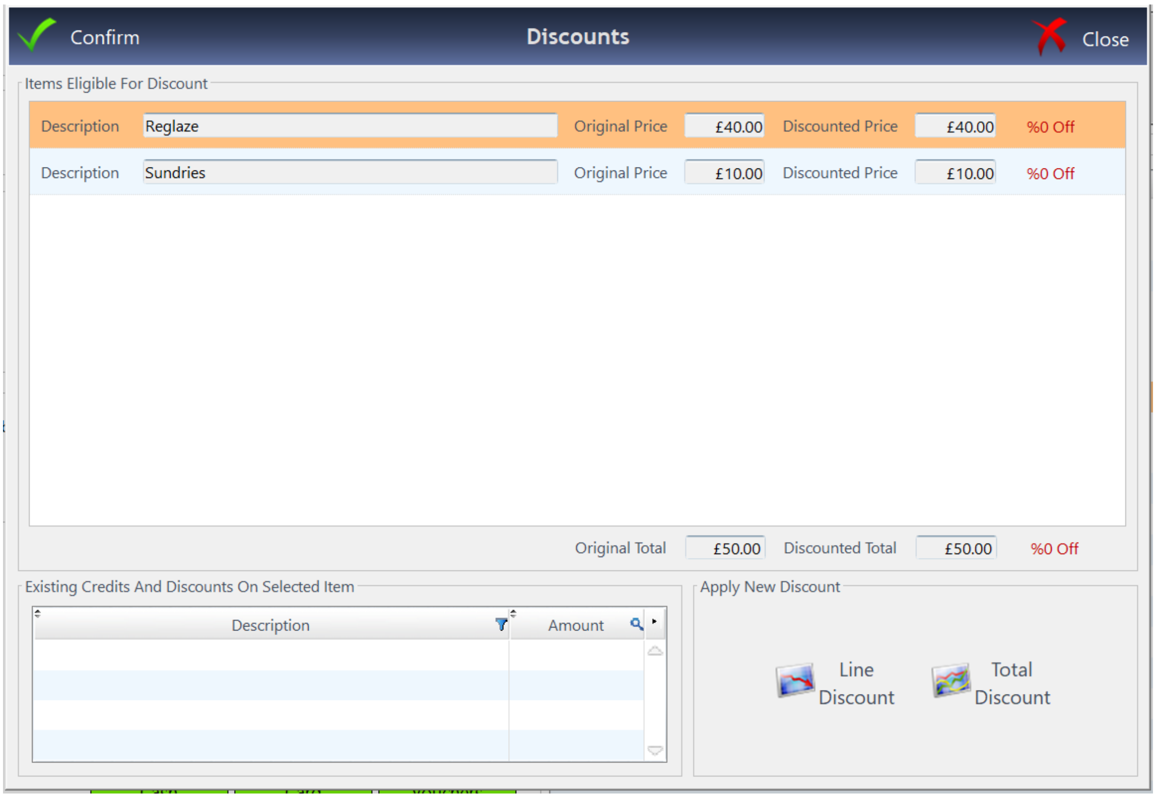


- Secondly double click on the receipt part of the screen
- A prompt will ask for staff pin again.
- Five options will then be available to you.



Discount

- Click on the **Discount** button
- The following screen will require you to apply the discount



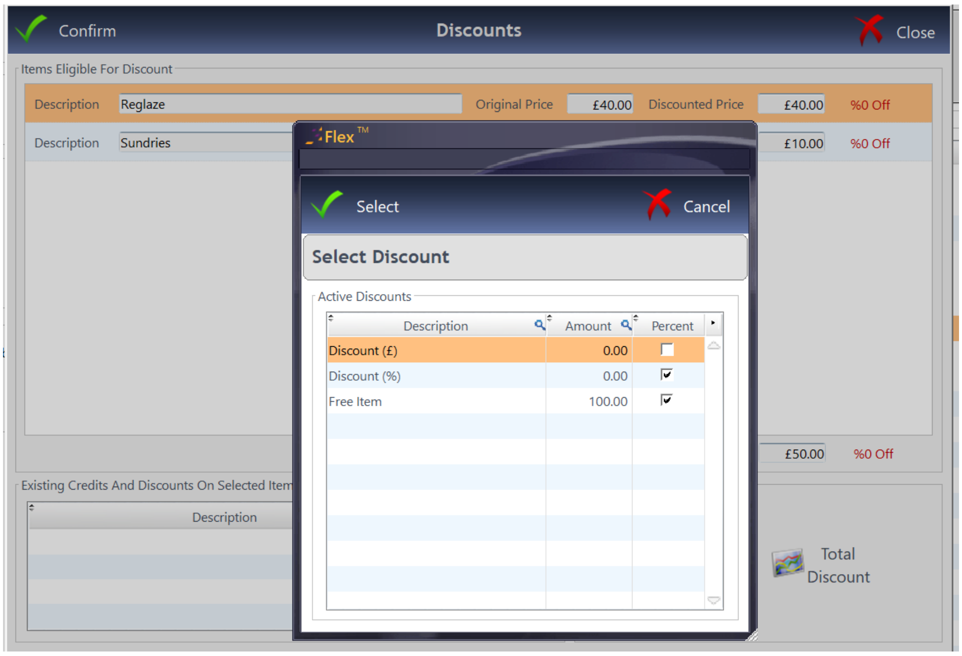
- Discounts are applied in two ways.
- Line Discount – Discounts on a single item (line)non the till receipt

OR

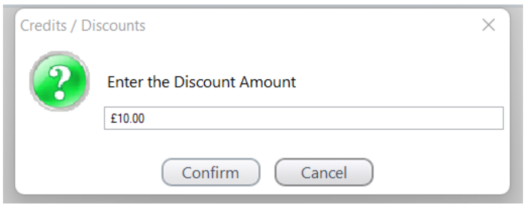
- Total Discount – Discount every item on the receipt (**Note** total Discounts are % only)

Line Discount

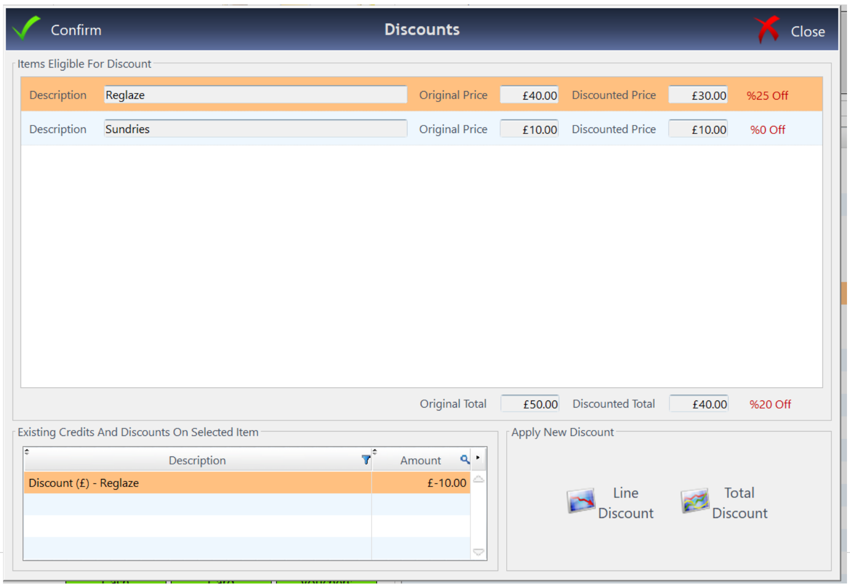
- Click on the item you wish to discount; it will be highlighted orange when selected
- Click on **Line Discount** at the bottom right of the window.



- Click on the amount and enter how much discount you wish to apply to this transaction.
- Enter the amount In the popup box



- This will be displayed in the discount window. Showing the original price and the discounted price. (as below).



- **Existing Credits and Discounts on selected items** will show the discount you have applied
- Click **Confirm** when all discounts have been applied.

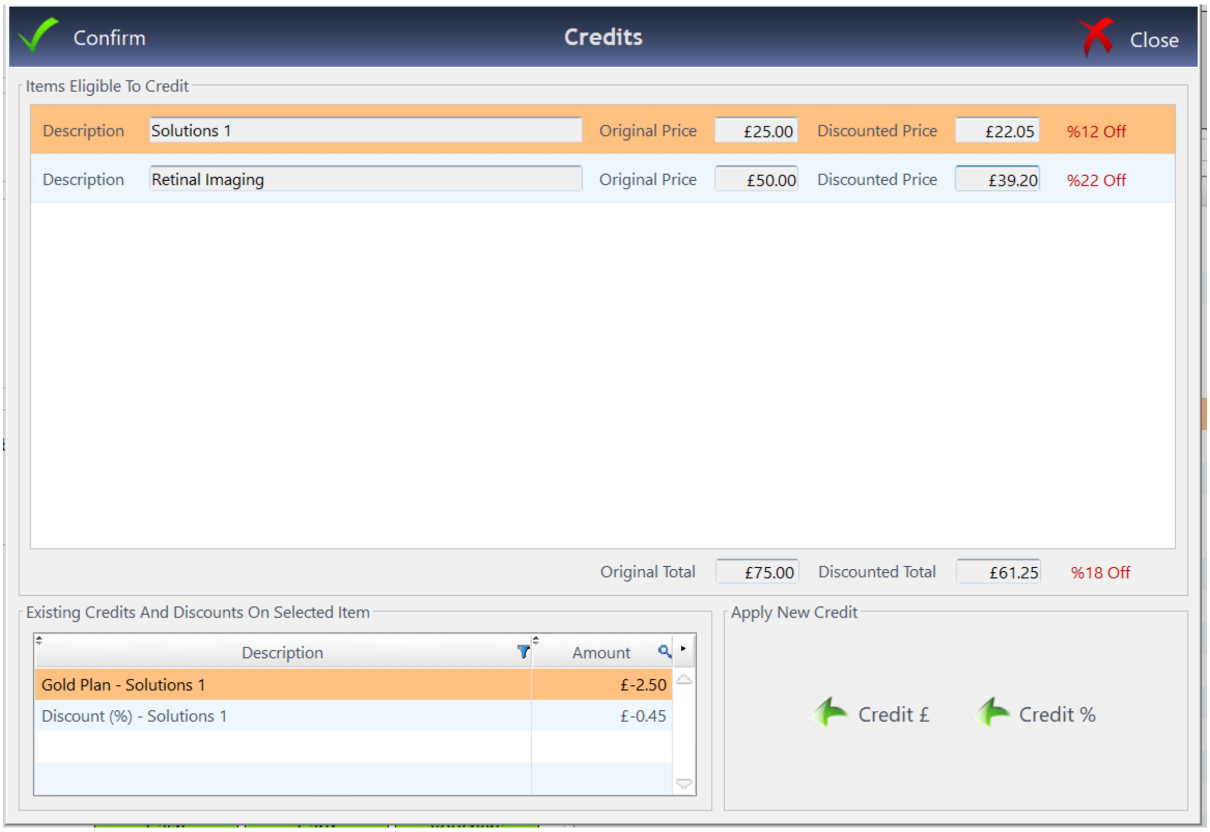
NOTE – If a discount is being applied *after* payment has initially been taken. FLEX will prompt you to do a refund on the system.

Total Discount

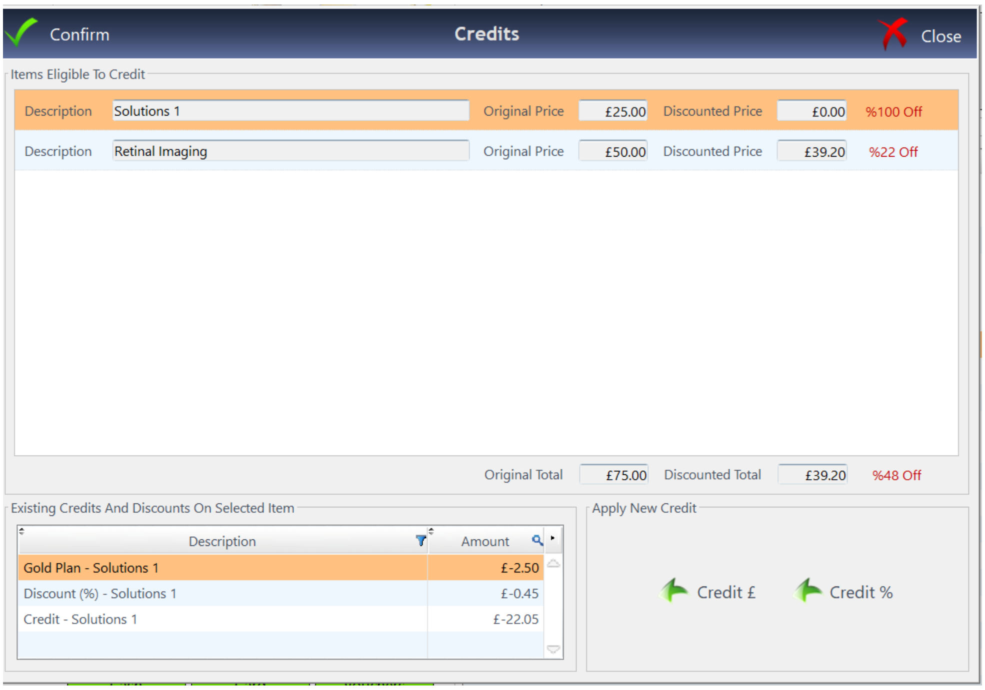
- Click on **Total Discount** at the bottom right of the discount screen
- Click on the discount you wish to apply, this is shown above, as per the line discount.
- Click **Select**. The total discount and the new selling prices will then be displayed against each item in the discount window. Will show line discount.
- Click **Confirm**

Applying a Credit

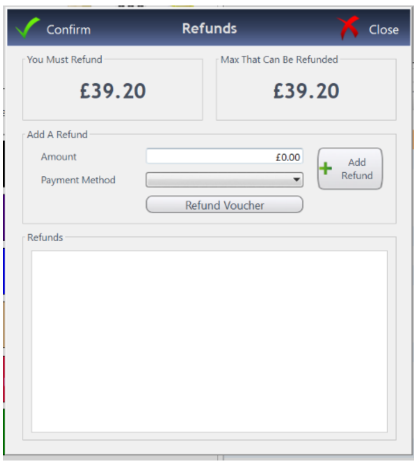
- Double click on the item you want to credit
- Enter staff pin (this can be set up to be only certain staff members if required)
- Select the **Credit** button from the pop-up window (as before)
- All items which can have a credit applied are listed.



- Click *either* **Credit £** or **Credit %**. These are bottom right of the credit window.
- When you click on this, a **credit** amount screen will come up. It will contain the full amount of the item you have clicked on.
- Confirm
- The amount will now appear in the box at the bottom of the screen, called the **Existing Credit and Discounts on selected items**.
- Against the item the original price will again be displayed but the discounted price will no be zero.

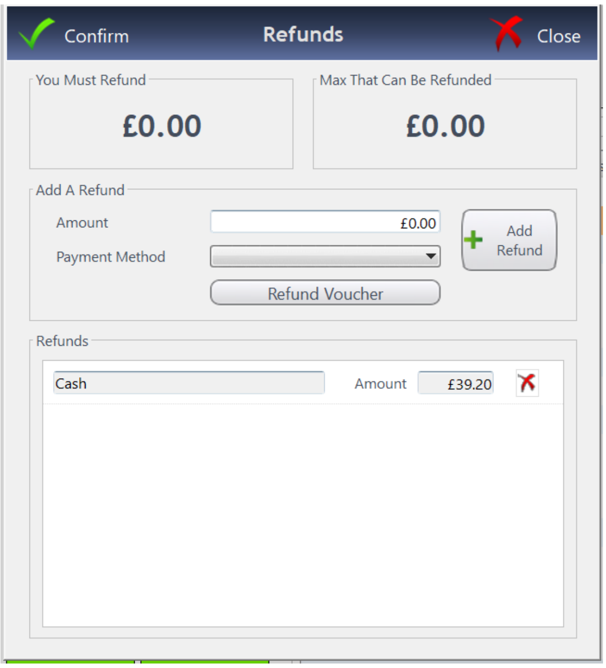


- If a **payment** has been taken against the item credited, then a refund will be required.



- The amount which qualifies to be refunded will appear in the **You must Refund** and the **Max That Can Be Refunded** boxes.

- Add the refund amount in the box
- Select the payment method. This will be the payment method originally used. I.e. Cash
- Click **Add Refund** to the right of the amount box.
- Once the refund is applied it will appear in the bottom portion of the window as below



- Click **confirm**
- The till will now have the refund applied and the balance at zero.
- The padlock is now in the locked position again.
- Each credit and refund done will be listed on the receipt side of the screen.
- This can be printed for the patient.
- If there is an **NHS Voucher** to refund, press the **Reduce Voucher** button
- Enter the value of the voucher (usually 100% of the value)
- Click **Confirm**

Void

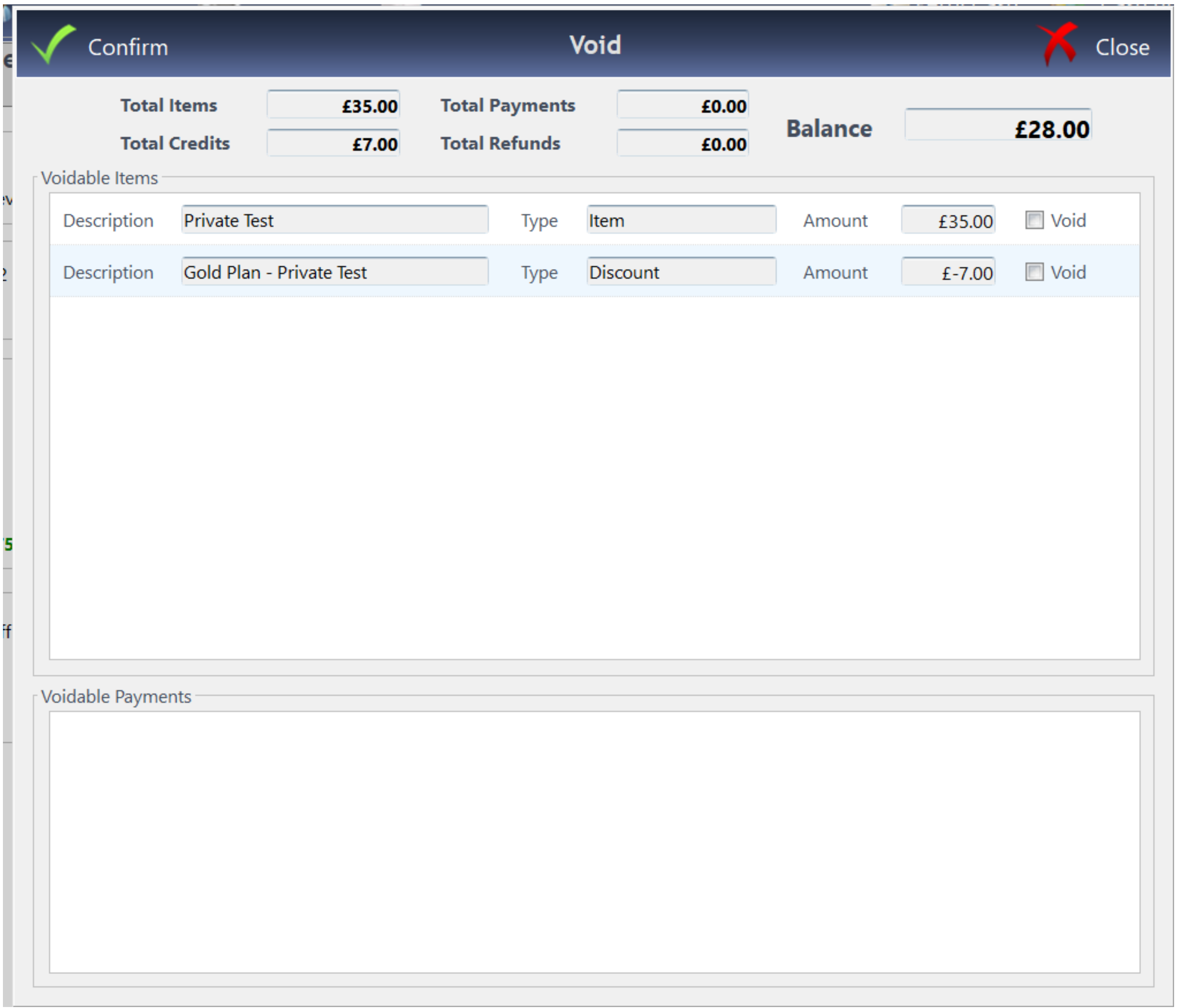
Only till lines that **have not** been cashed up can be voided; the void button appears greyed out if there are no items/payments that can be voided on the receipt. Till lines that have not been cashed up are displayed with an asterisk * on the till.

This is to highlight what can be voided / Changed.

Voiding a sales item will also void any linked credits and discounts.

To Void an item

- Double click on the item
- Enter staff pin

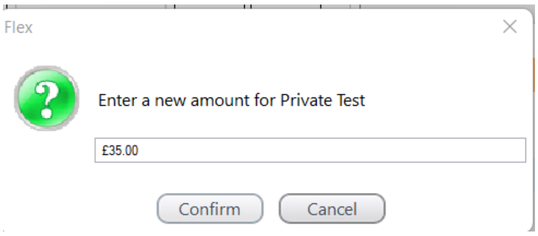


- Click on the times you want to void, this will put a tick next to them.
- Click **confirm**
- Flex will ask if you are sure you want to void.
- Click **Void**
- The till receipt will display zero balance and have not items on the receipt.

Changing a Price

If a price is on the system incorrectly and only noticed during a transaction, the price can be changed on the till.

- Double Click the item to be changed (unlike the other over-ride options, the item clicked is the items directly affected.
- Enter your staff pin
- Select **Change Amount**
- Enter the amount in the popup box.



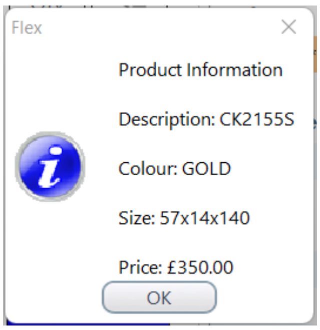
- *This is only available if **Cash up** has **NOT** been done.*

Price Check

To check a price, you will need a **Price Check** button setup. This is done within the setup menu. (Online Manual available)

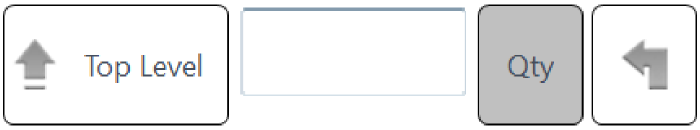
Once this button is set up, press the relevant button. It will ask you for a barcode to be entered. If you have a scanner, simply scan the item and the price will be shown. If not, then simply enter the items bar code as its setup on FLEX.

The product information, description, colour, size, and the price will then be displayed for you.



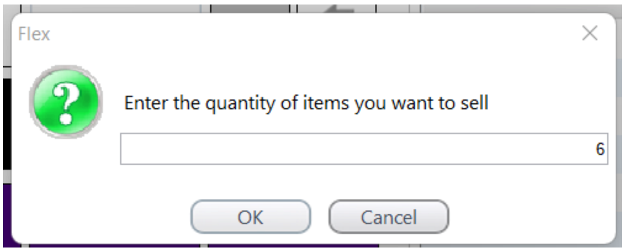
Sell Multiple Items

To sell multiple quantities of an item, click QTY button which is above the till buttons. (as below). The button will grey out once pressed.

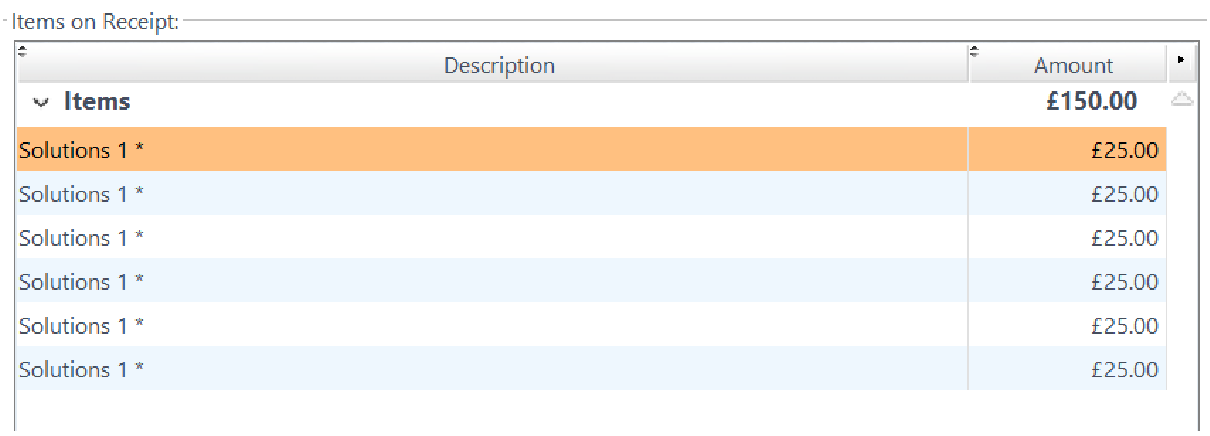


Sell the item(s) by pressing the relevant button on the till, FLEX will as how many of this item are you selling. For each product you will need to click on the **QTY** button again if you want more than one of them.

- Enter the quantity of the item you want to sell.



- If selling an item that isn't priced in stock, enter the amount.
- If the item is priced, FLEX will simply add the item by amount you have requested. (In this example 6 items)



Printing & Emailing Receipts

Printing

- Set a printer up to print receipts to your specific printer in the setup section of FLEX.
- When a receipt is ready to be printed, in the blue bar the top of the Till screen in flex, there is a **Print Receipt** button. Click this and your receipt will print out.

Email Receipt

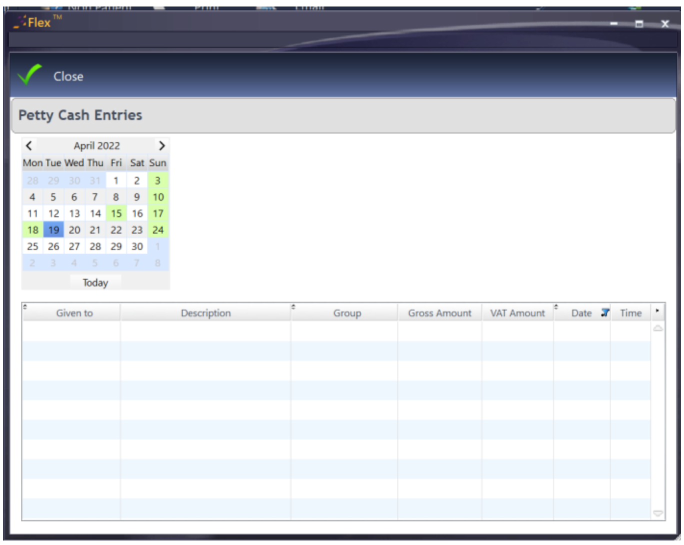
- Click on email receipt – This will be setup in branch setup with the smpt information required.

Note: Receipts cannot be emailed to non-patients.

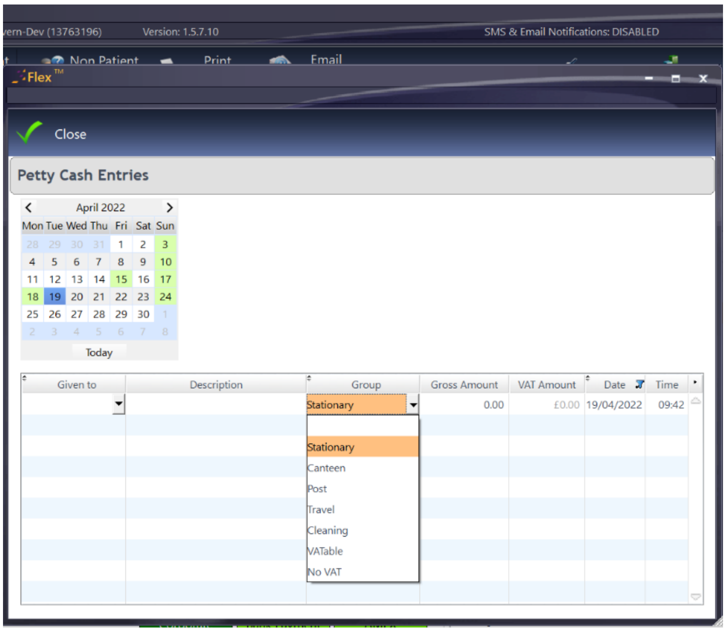
A copy of any emails sent will be saved in the correspondence log.

Petty Cash

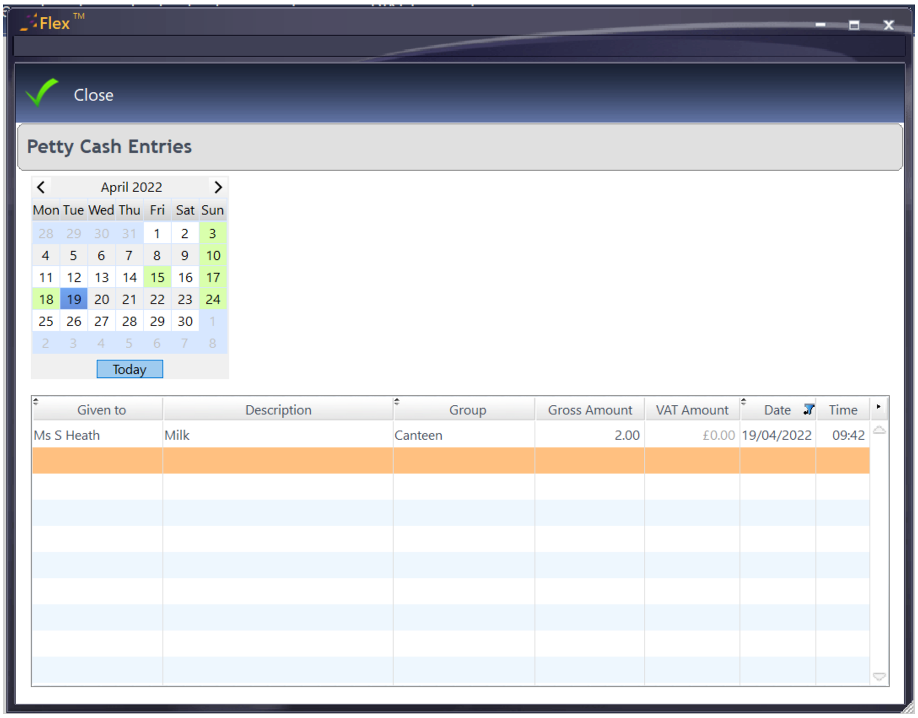
- The Petty Cash function allows users to log and record small amounts of money taken out of the till for things such as milk, stationery etc
- Click on the **Petty Cash button** on the blue bar at the top of the till screen.



- Select the member of staff who is receiving the money in the **Given to** column
- Description – what they are buying
- Group i.e Stationery etc



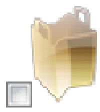
- Enter the amount, if VATable then the system will enter the amount of VAT automatically when you select the appropriate group.
- This will be date and time stamped.
- This carries through to the end of day CASH UP



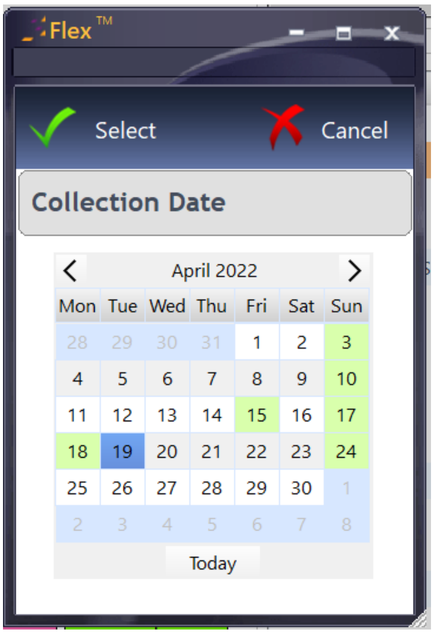
Mark Receipt as Received

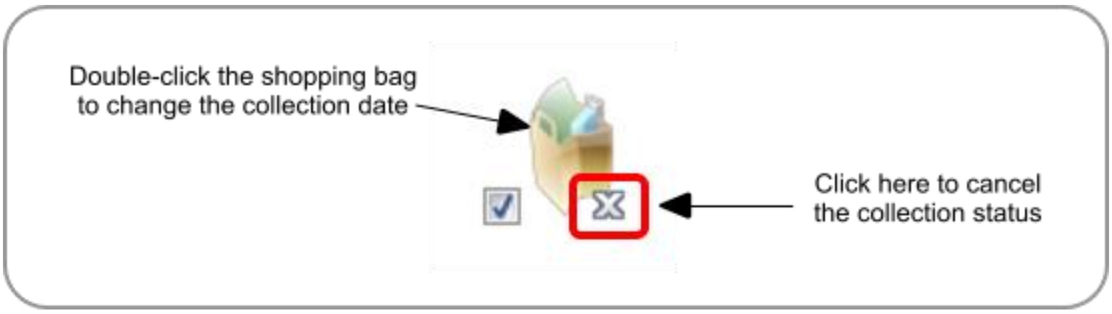
An item needs to be marked as collected to update the status of the NHS Voucher for processing. It's good practice to mark all items as **collected** when the patient has collected them. All Sight Test fees are marked as ready to be claimed automatically, but frames and lenses etc., need to be marked as collected on the till before the money can be claimed.

- To mark an item as collected, double-click on the shopping bag towards the top of the till screen, the button is shown below:



- Select a date from the calendar and click select



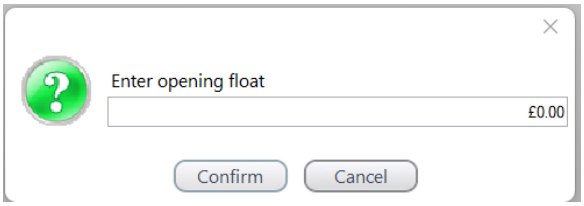


Cash Up

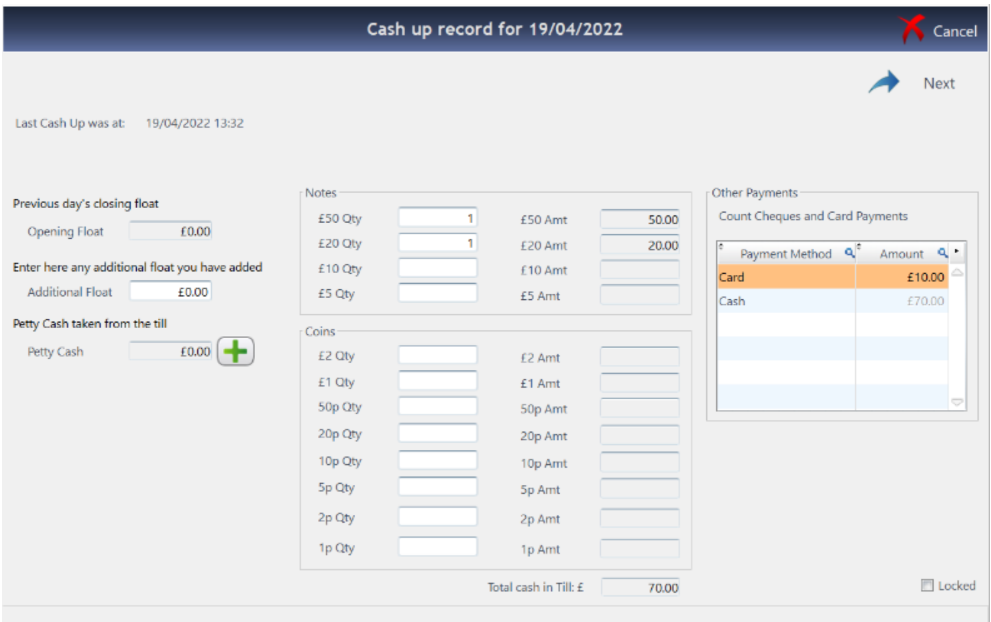
Cash up should be done as soon as the practice closes and there are going to be no further transactions taken.

- Cash up is found on the Till Screen on the blue bar at the top of the window. (As below)

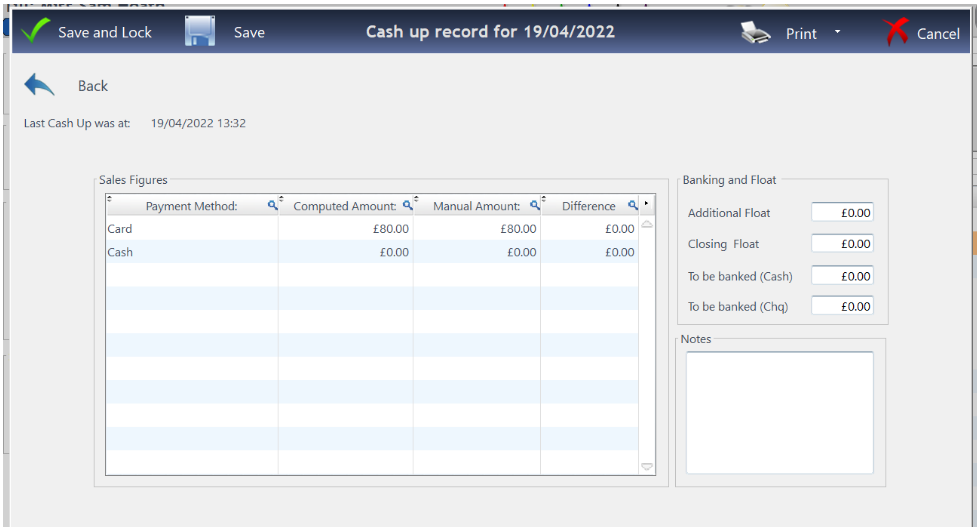
- Select **Cash up**
- The first time that Cash up is selected there must be a float amount entered.



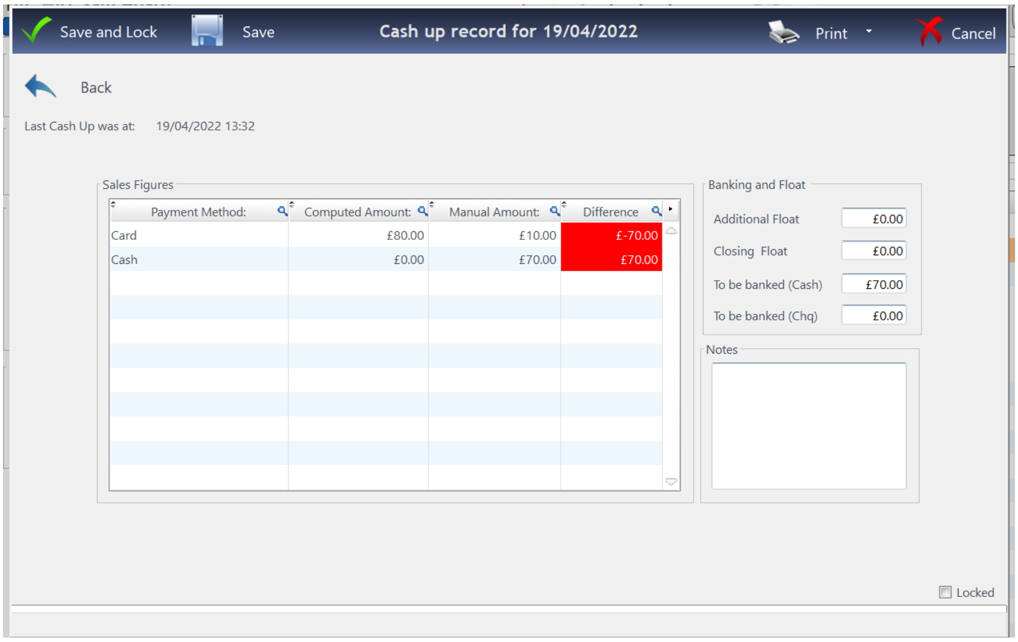
- This is only required once *unless* the closing float was zero at the previous cash up.
- Click confirm
- On the left there is the opportunity to add any additional float which may have been added to the till
- Petty Cash can also be added here.
- Enter the denominations of the cash in the till in the centre part of the screen.
- Under **Other Payments** on the right
- Enter in any other amounts i.e. Card payments, double click on the 0.00 and add the amount which you will have recorded from your card machine when doing the Z Reading.
- Click ***Next***



- If everything balances at this point the screen will look similar to the screenshot below.

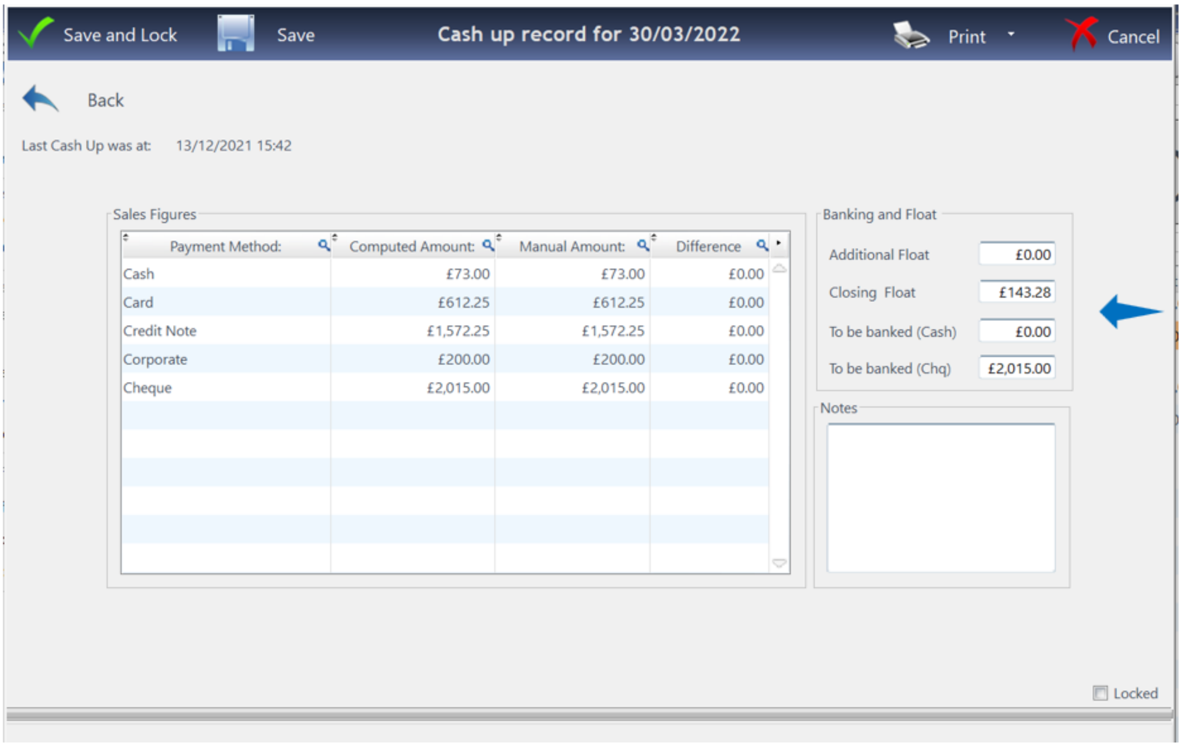


- If there is a discrepancy the amounts will be highlighted in red in the **difference** column



Amendments

- Amendments can be made in the **Banking and Float - for example if you're not banking any cash today, change the To be banked (Cash) amount to zero and it will be automatically added to the closing float.**



- The ‘**Save**’ button saves the record, it can be continued by reopening the cash up screen.

- The '**Save and Lock**' button saves and locks the record.

- The ‘**Cancel**’ button removes the record.

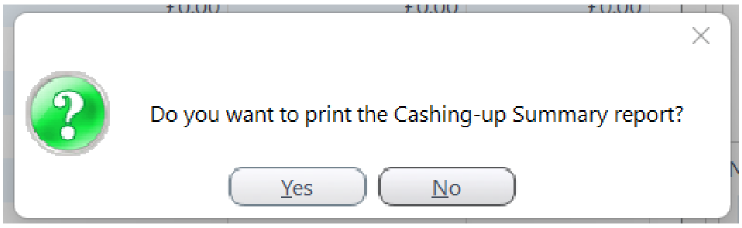
- Once the till balances and there are no further transactions to put through the till. **Save and Lock** can be clicked. **Only when all transactions are done. This CAN NOT be reversed.**
- If there is a need to put through another transaction at this point then **Save** can be clicked which will allow the cashing up to be continued later.
- The following message will display as a last check to make sure the cash up can be locked.

Optinet Support are UNABLE to rectify cashing up records once they have been locked!
You will be prompted as to whether you wish to print the Cashing-Up Summary.

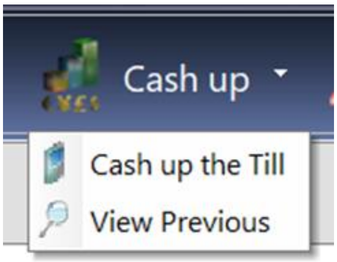
NOTE - The **Payments** and/or **Petty Cash** reports can be printed from the **Print** button. They are also available in the Reporting section of **Business Intelligence.**

Cashing up Report

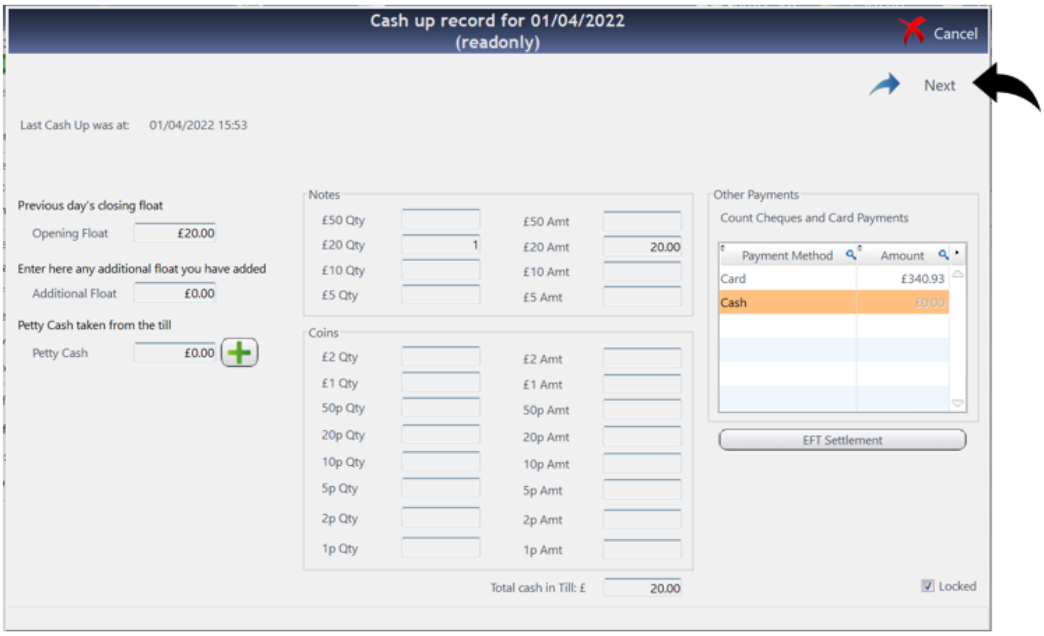
- To view your Cashing Up Report, you can press YES when you have SAVED and LOCKED the cashing up window.



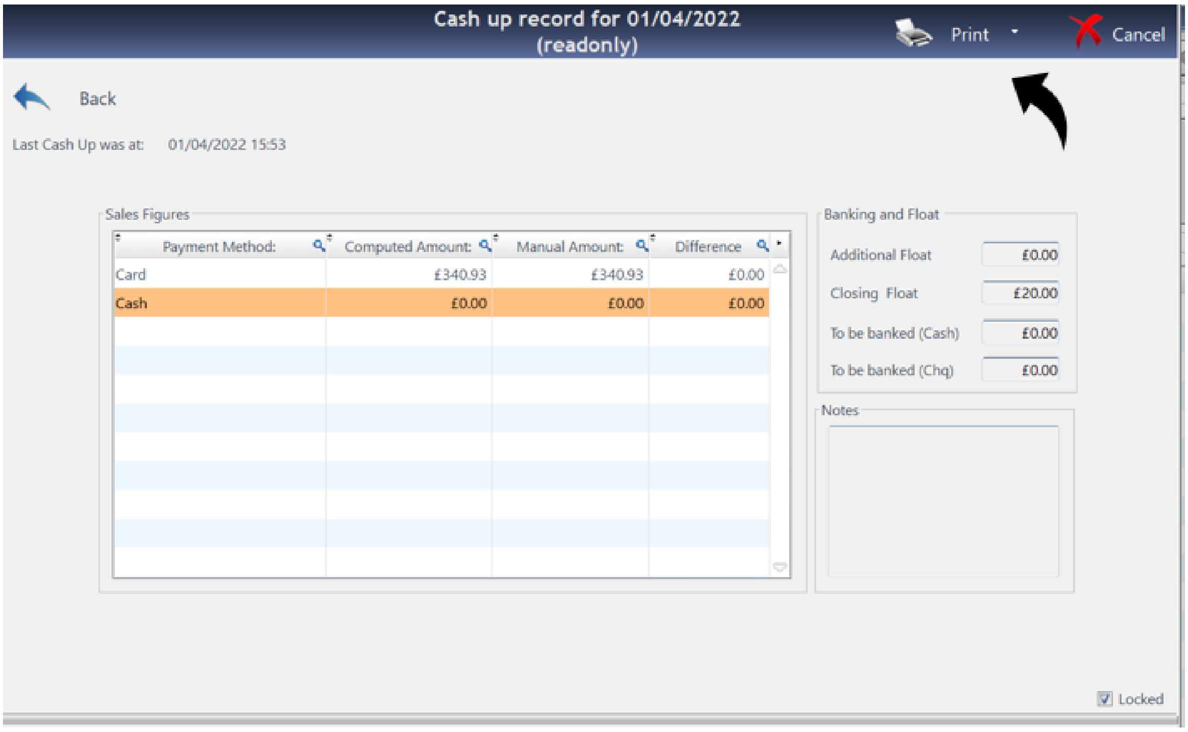
- To get back to these reports in the future, or if this prompt does not appear, you can **View Previous** under the **Cash Up** tab as below;



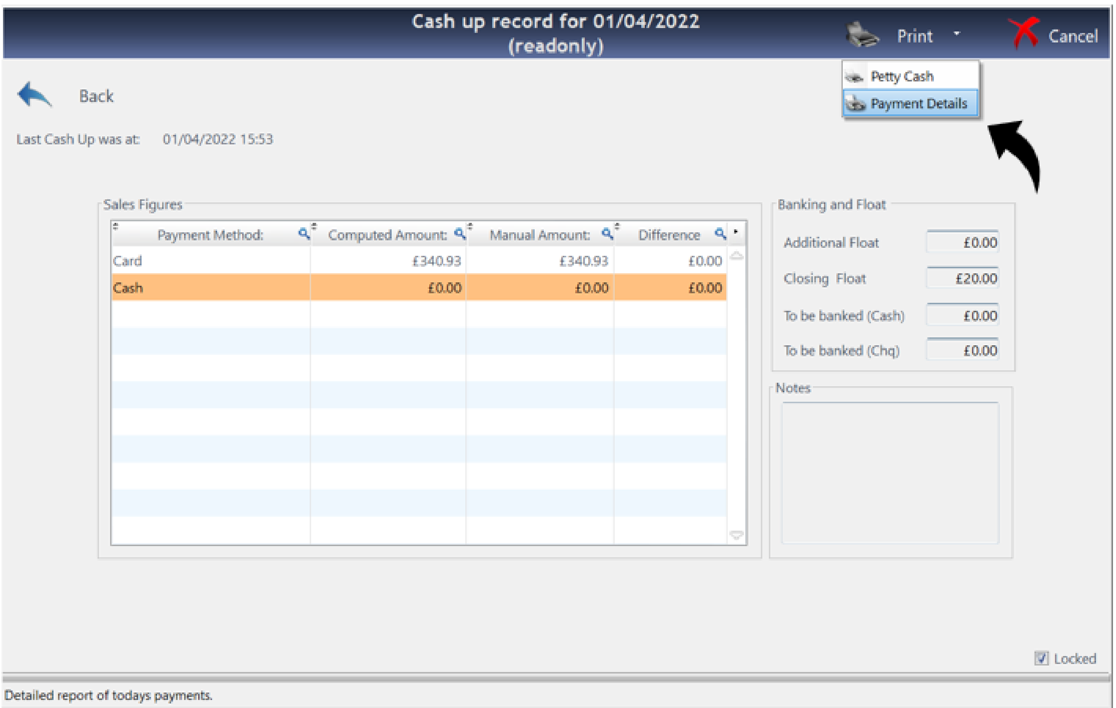
- Click Next



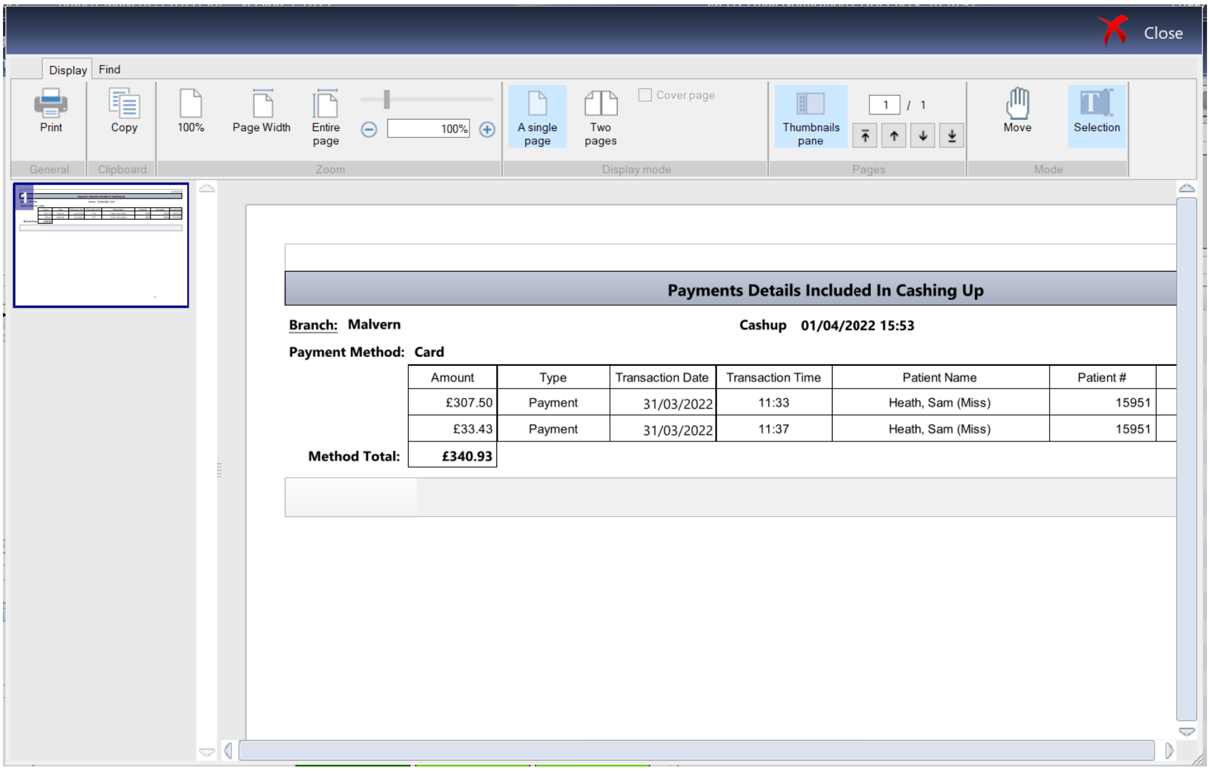
- Then Click on Print on the blue bar at the top of the window.



- Click on Payment Details



- The print will be as below:



- Alternatively, go to the Reporting tab of Business Intelligence.

(You may or may not be able to get to this screen and / or report, depending on your Staff Role setup)