

User Guides - **Stock**

Learn how to add new stock, small and large quantities, and make changes to existing stock. Stock take, all stock or groups of stock and export stock spreadsheets.

We can also set up a stock warehouse system designed for Blink users with multiple sites.

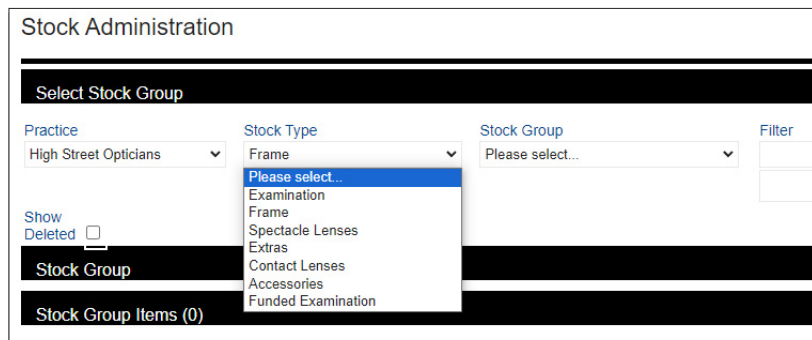
The Stock section of Blink (located within System Admin) allows you to add all of your practice stock to the system. The most comprehensive form of dispensing is when it is used in conjunction with the examination module and when stock has been entered into the stock inventory.

Once stock has been added you can manage the stock items and easily make changes such as price.

All Blink trial systems are set up with demo stock, so that you can demo a realistic system. This stock can be cleared down to enable you to add your own stock.

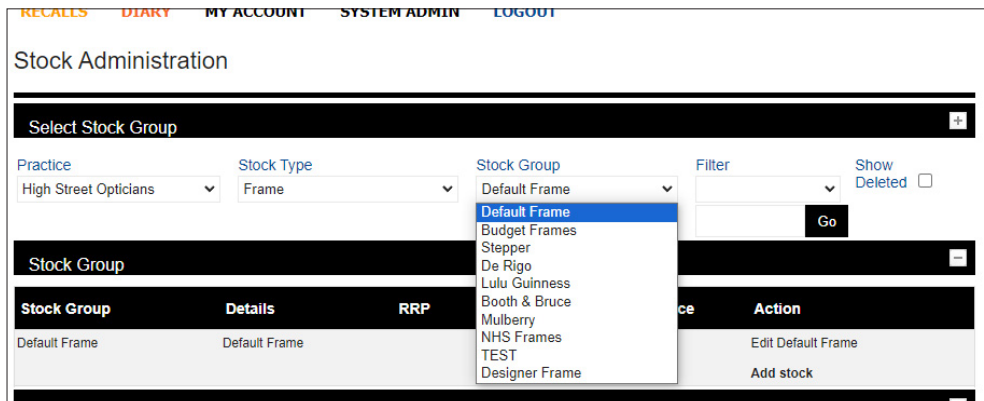
All Blink systems will be set up with a number of 'Stock-Types' and all stock whether it be new frames, lenses, vouchers or examinations will go under one of these Stock Types.

- Examination
- Frame
- Spectacle Lenses
- Extras
- Contact Lenses
- Accessories
- Funded Examination



Each Stock Type can have various 'Stock Groups' added to it – depending on the stock items that needs to be added.

For example Stock Type 'Frame' can have stock groups such as 'Budget Frames', Designer Frames', NHS Frames, or individual designers etc. Individual Stock items are then added to the relevant stock groups.



Adding new stock

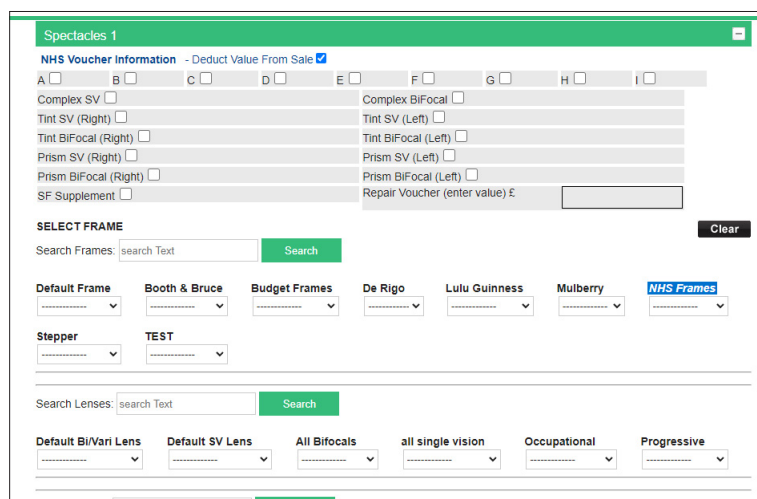
There are two ways that new stock can be added to your Blink system depending on the amount of stock you need to add.

Adding small quantities or one off stock items

First it is a good idea to make sure that a relevant 'Stock Group' is available to add your new stock item into.

When stock groups are added they appear on the Dispensing page. For example, if you select 'Spectacles 1' (as shown in image) all of the different categories are the different stock groups.

If a relevant stock group already exists you can move straight to adding the stock item.



Create a new Stock Group

- System Admin
- In the left hand menu select *Stock* -> *Add Stock Groups*
- Complete all the fields marked * (when adding bifocal or varifocal lenses remember to tick the box 'Vari/Bi Focal Lens Types')
- Choose the Stock Type from the drop down menu
- Complete a group name (as you would like it to appear on the dispensing page) e.g Designer Frames
- Detail – you can add extra detail here or repeat the group name
- 'Sequence' denotes the order the stock groups appear on the dispensing page
- Click the 'Add' button
- You will be notified that '**Stock Group added**' in red text

Stock Group Administration
Stock Group added

Add Stock Group

Stock Type * Frame

Group Name * Mid Frames

Detail * Mid Frames

Default Price Not used

Lab/Supplier Please select...

Sequence

The stock group has been now been added but will only appear on the Dispensing page once it has stock in it.

Add a new stock item

- System Admin
- In the left hand menu select *Stock* -> *Add Stock Item*. This will take you to the Stock Item Administration page where you can add a stock item
- First select a Practice, Stock Type and Stock Group from the top drop down menus
- Next add the stock item completing all of the fields marked *. Info such as colour and size etc. can also be added
- 'Sequence' denotes the order the stock item will appear on the dispensing page.
- Click the 'Add' button
- You will be notified that '**Item added to stock.**' in red text

The stock item has now been added and will appear under the relevant stock group on the dispensing page.

Stock Item Administration

Practice High Street Opticians Stock Type Frame Stock Group Designer Frame Filter

Add Stock Item

Item Name * Wolf 1675 Sequence

Brand / Index Wolf Location @High Street Opticians

Colour Steel Grey Bar Code

Size 50-16

Detail * Wolf 1675 Steel Grey 50-16

Price * 120

RRP

Cost Price

Stock Level * 999

Set stock level for all practices

Item Icon

Choose file No file chosen

IMPORTANT
If adding a price or cost price DO NOT include the '£' only the numerical figures.

Stock level - your stock level will decrease by 1 each time a stock item is dispensed, once at '0' the stock item will no longer appear in the dispensing page. For any items which are not under stock level control (e.g. lenses or 'Patients own frame') set the stock level to be high e.g. 10000 so that they don't run out.

You can use these methods for adding items such as discount vouchers

Create a stock group called Vouchers (if it doesn't already exist on the system). We would suggest creating this in stock type Accessories:

Next add a stock item to the stock group by selecting 'Add Stock Item'

- Select The Practice
- Stock Type (Accessories)
- Stock Group (Vouchers)

Now add the voucher.

- Name the voucher e.g. £10 discount voucher
- Put the same into 'Detail'
- Price -10.00 (-10.00 is deduct the value from the order)
- Stock level - set this to 10000 so that it doesn't run out.

The screenshot shows the 'Dispensing' interface with a 'Card payment busy' notification. The main area is titled 'Accessories + Vouchers'. There are dropdown menus for 'Solutions', 'Other', and 'Vouchers' (set to 'All Vouchers'). A 'Selected' section shows 'Vouchers - £10 discount voucher' for £10. Below this is a 'Sale Total' table:

Item	Unit Price	Discount (£ or %)	Qty	VAT	Price
Spec 1 Booth & Bruce, . . . £165	£ 165.00	0.00	1	£ 13.07	£ 165.00
Vouchers - £10 discount voucher	£ -10.00	0.00	1	£ 0.00	£ -10.00

Below the table is a 'Vouchers' section with a 'Value ex VAT' of £ 141.93, 'WAT' of £ 13.07, and a 'Total' of £ 155.00. There are also options for 'Amount Paid', 'Amount Outstanding', and 'Change'. Payment options include 'Cash', 'Creditcard' (selected), and 'Other'. There are checkboxes for 'Send receipt, by email', 'by SMS', 'Print receipt', and 'Print lab summary'. A 'Place Order' button is at the bottom.

When creating a dispense you will be able to select the discount voucher under 'Accessories & Vouchers' and apply it to the dispense.

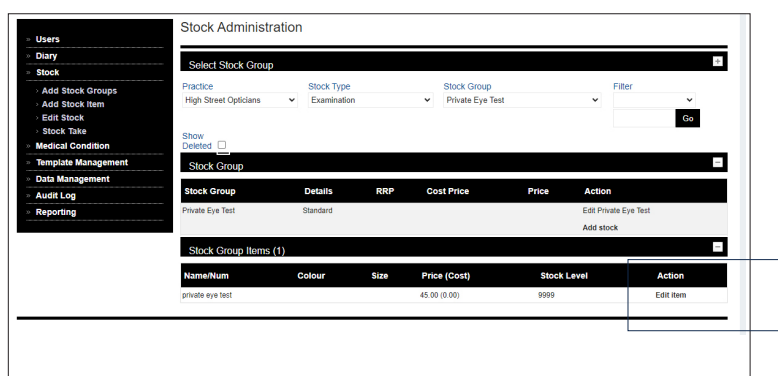
You can also use this method for adding new examinations

Follow the steps for adding discount vouchers but choose the relevant stock type 'Examination or Funded Examination'. The examinations will appear under private examination or funded examination on the dispensing page.

Changing the price of an examination

Once all of your examinations have been set up it is easy to amend the price if needed. *Your system will already be set up with standard examinations.*

- Go to *System admin -> Stock -> Edit Stock*. This will take you to the Stock Item Administration page.
- From the drop down menus choose the practice, stock type, and stock group.
- This will show a list of 'Stock Group Items'. You can select 'Edit item'. This will open up the stock item page where you can amend the price and update. The new price will be reflected on the dispensing page.



The screenshot shows the 'Stock Administration' page. On the left is a navigation menu with options like Users, Diary, Stock, Add Stock Groups, Add Stock Item, Edit Stock, Stock Take, Medical Condition, Template Management, Data Management, Audit Log, and Reporting. The main area has a 'Select Stock Group' section with dropdown menus for Practice (High Street Opticians), Stock Type (Examination), and Stock Group (Private Eye Test), along with a Filter dropdown and a Go button. Below this is a 'Stock Group' section with a table:

Stock Group	Details	RRP	Cost Price	Price	Action
Private Eye Test	Standard				Edit Private Eye Test Add stock

Below the table is a 'Stock Group Items (1)' section with another table:

Name/Num	Colour	Size	Price (Cost)	Stock Level	Action
private eye test			45.00 (0.00)	9999	Edit item

Edit Stock

Here you can edit individual existing stock items.

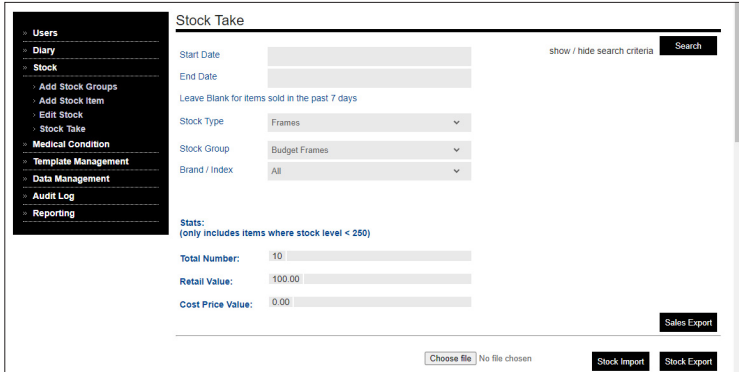
- Go to *System admin -> Stock -> Edit Stock*. This will take you to the Stock Item Administration page.
- From the drop down menus choose the practice, stock type, and stock group.
- At the bottom of this page 'Stock Group Items' will show a number e.g.. (5). This is the number of items within that stock group. Press the + to show them. Click on 'Edit Item' on the item you would like to change. This will open up the details of that stock item, you can make any changes and press 'Update' to save.

A much quicker method of updating stock items is through 'Stoke Take' (a recent Blink update). This is fully explained over leaf.

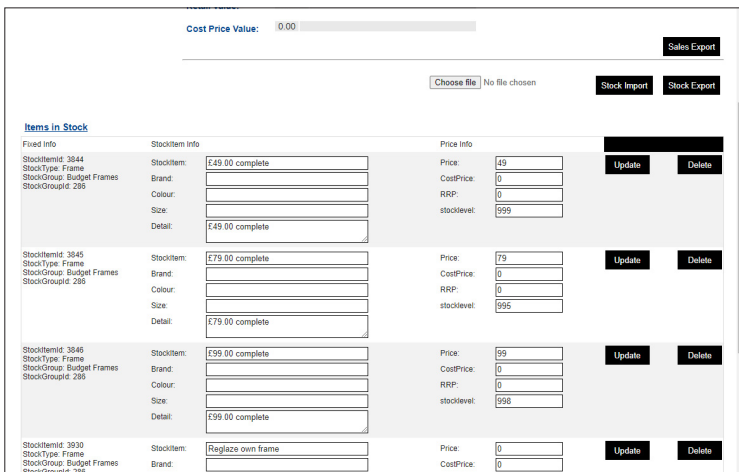
Stock Take

This is where you can **view** and **amend** all stock on your system.

Go to *System admin -> Stock -> Stock Take*. This will take you to the Stock Take page. You can use the different search methods to search and display different items of stock. Once you have made your selections a scrollable list of stock items will appear which you can make changes to.



If there are large volumes of stock it may take a while to load them all. If the circle is spinning in your browser url, the stock is still loading.



Stock will appear in alphabetical order

Scroll to the stock item you would like to amend, make the change and press 'Update'. A red notice will appear at the top of the page 'Update Successful'.

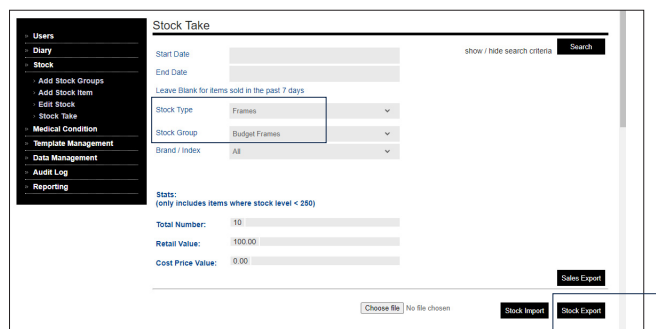
You can also delete stock items here.

Adding multiple stock items

Adding larger amounts of stock is done through a spreadsheet upload. The spreadsheet is prepared outside of Blink and imported.

First you will need to download a spreadsheet to add your stock to. To do this go to:

- Go to *System admin -> Stock -> Stock Take*
- In the Stock Type drop down menu choose the required Stock Type and Stock Group and click the 'Stock Export' button.



- This will export a Microsoft Excel file for you to save onto your computer and add your stock to
- Scroll down the spreadsheet to [Enter Existing Stock Group] [Enter New Stock Item] Add new stock below this point, following exactly the same format.
- The stock above this point is existing stock. You can make changes to these items, such as price changes and they will be reflected once the file is uploaded.
- **Important** - Do not change or add to any of the columns or titles on the spreadsheet. The file will not import if any of the columns or titles have been changed.
- **Important** - Rows highlighted in blue contain unique identifiers for each stock item in hidden columns A & B, therefore do not copy and paste any complete rows otherwise these identifiers will be duplicated and cause stock problems.

	C	D	E	F	G	H	I	J	K	M
1	Stock Group	Stock Item	Colour	Brand	Size	Detail	Price	Cost Price	High Street Optician	Barcode
2	Budget Frames	£49.00 complete				£49.00 complete	49	0	999	
3	Budget Frames	£79.00 complete				£79.00 complete	79	0	995	
4	Budget Frames	£99.00 complete				£99.00 complete	99	0	998	
5	Budget Frames	TOF Free				TOF Free	0	0	971	
6	Budget Frames	Reglaze own frame				Reglaze Px own frame	0	0	956	
7	Budget Frames	Standard Frame	Blue			standard frame	10	0	10	
8	[Enter Existing Stock Group]	[Enter New Stock Item]								
9	Budget Frames	£109.00 complete	red			109.00 complete	109	0	999	
10										
11										
12										

Import Stock

Once you have added your new stock to the spreadsheet you need simply import it into Blink.

- On the Stock Take page select 'Choose file' and locate the completed spreadsheet.
- Click 'Stock Import' and your stock will import

You can check that your stock has imported by checking it is appearing on the dispensing page.

You can also use the Stock Take area of Blink to look at and export stock sales by using the search facilities.

- Choose a start and end date
- Stock Type - select 'Sold Items'
- Select Stock Group and if needed Brand/Index.

You can then look at the sold items and export a spreadsheet by selecting the 'Sales Export' button.

Contact

If you need guidance regarding any aspect of Blink you can contact us on the support email, where we will always try to respond within 24 hours:

support@blinkoms.co.uk

Alternatively you can call us on the support line: 07748 500430

Or call the office phone: 0116 431 8284