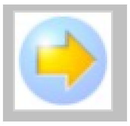
i-Clarity

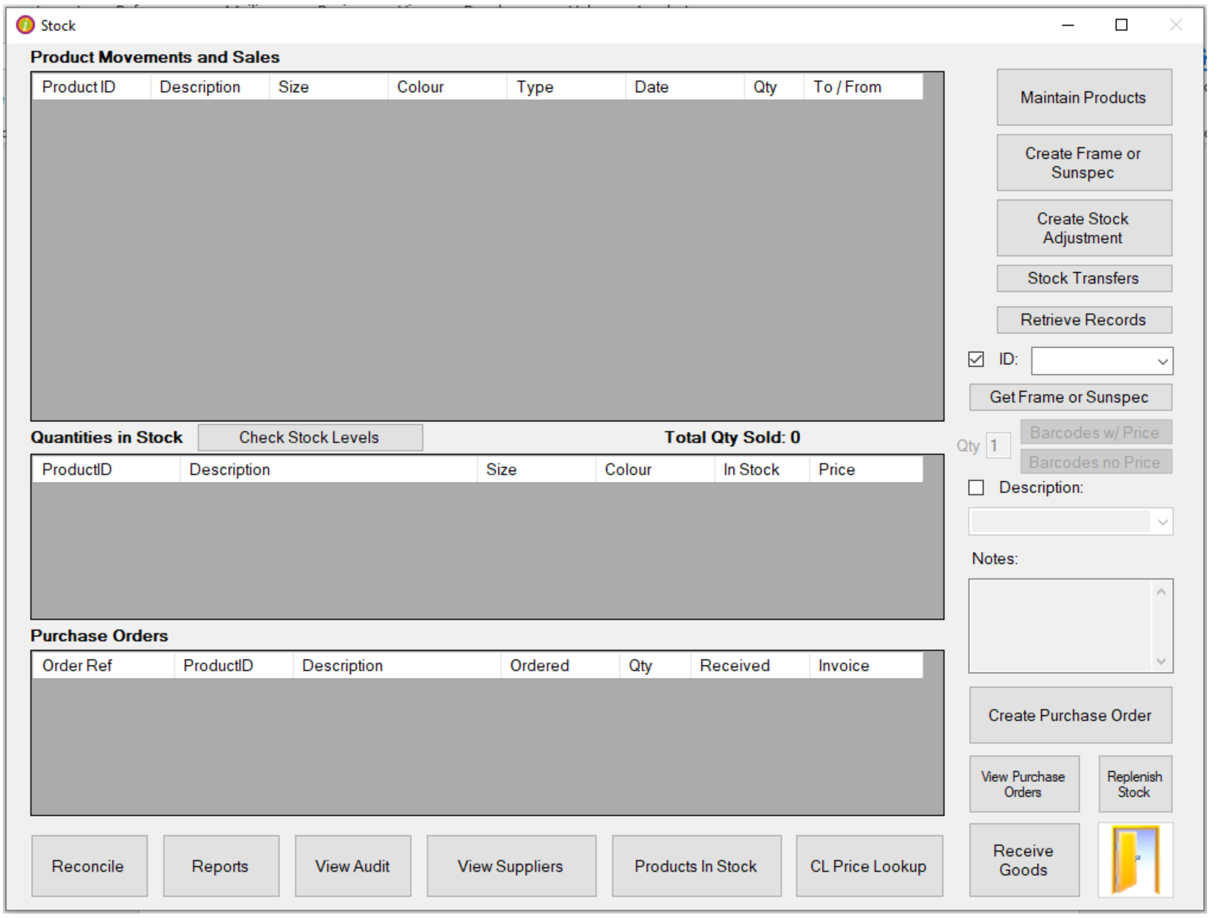
The Stock Module and Stock Control

i-Clarity Version 3.3.2

The stock module is accessed by clicking on the yellow arrow pointing to the right to display the 2nd set of icons



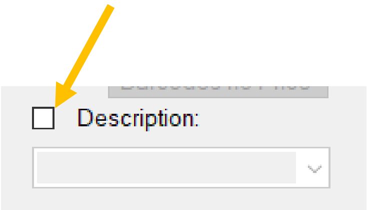
and then by clicking on the stock module icon.



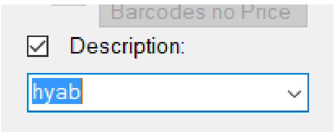
Creating a stock adjustment for a solution of accessory.

This process is used to record stock movements for solutions or accessories e.g. a delivery from a supplier.

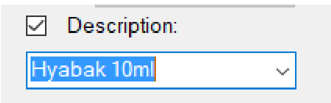
Tick the box next to the description field.



Start typing the description of the product that has arrived.

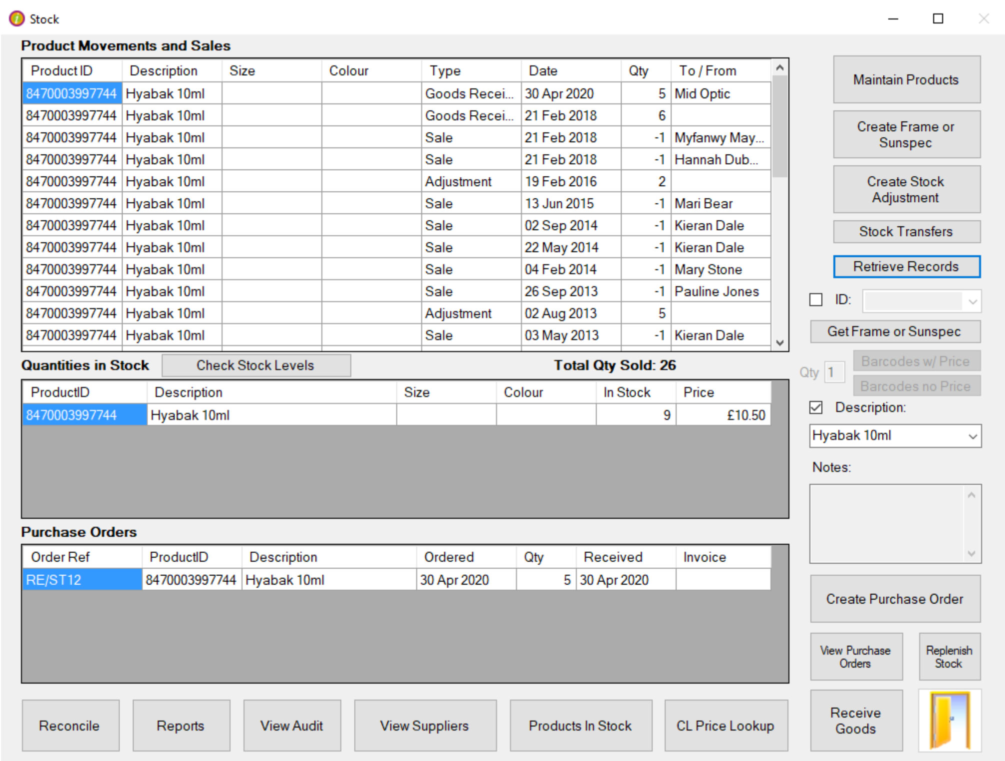


Click on the drop-down arrow and select the correct product from the drop-down list.

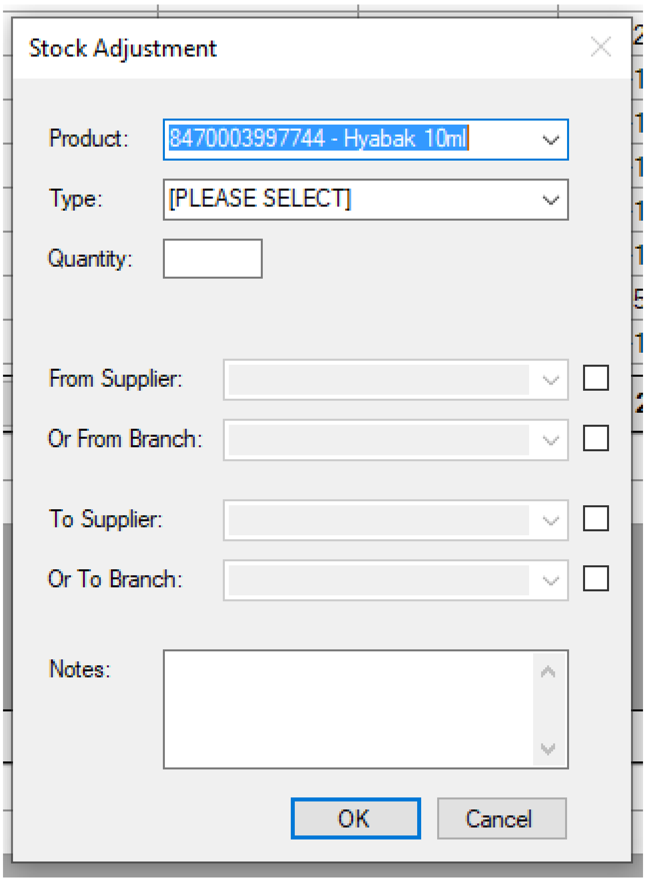


Click Retrieve Records.

The product details will be displayed on the main stock module form.

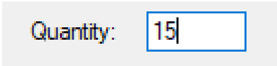


Click Create Stock Adjustment.



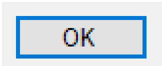
Select an adjustment type from the adjustment type drop-down.

Enter the quantity of the stock adjustment.

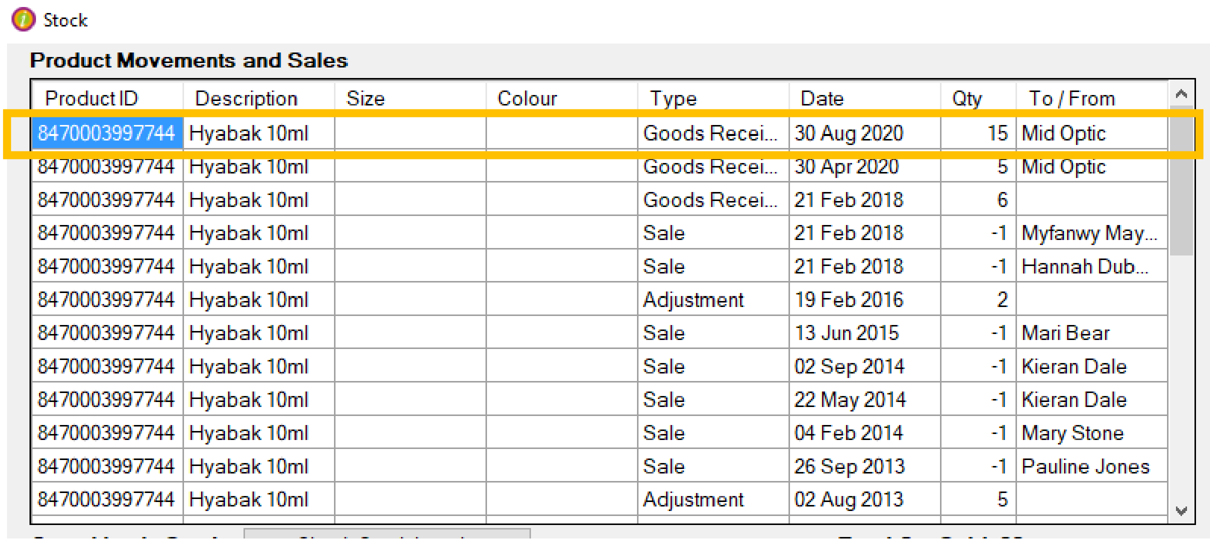


If applicable you can enter more details about the adjustment e.g. select the supplier the products have been sent from.

Click Ok.



An entry will be made in the product movements and sales box.

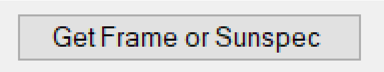

Stock

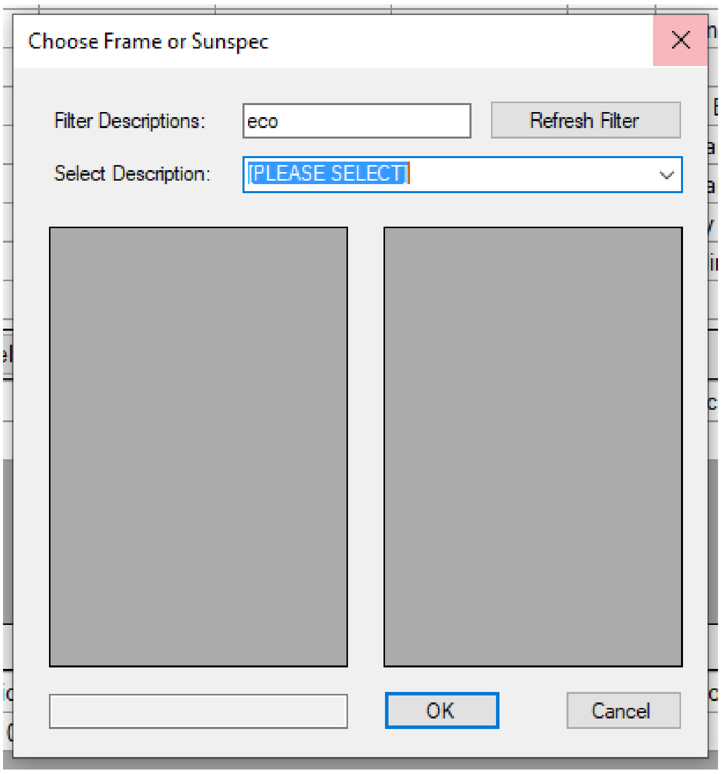
Product Movements and Sales

Product ID	Description	Size	Colour	Type	Date	Qty	To / From
8470003997744	Hyabak 10ml			Goods Recei...	30 Aug 2020	15	Mid Optic
8470003997744	Hyabak 10ml			Goods Recei...	30 Apr 2020	5	Mid Optic
8470003997744	Hyabak 10ml			Goods Recei...	21 Feb 2018	6	
8470003997744	Hyabak 10ml			Sale	21 Feb 2018	-1	Myfanwy May...
8470003997744	Hyabak 10ml			Sale	21 Feb 2018	-1	Hannah Dub...
8470003997744	Hyabak 10ml			Adjustment	19 Feb 2016	2	
8470003997744	Hyabak 10ml			Sale	13 Jun 2015	-1	Mari Bear
8470003997744	Hyabak 10ml			Sale	02 Sep 2014	-1	Kieran Dale
8470003997744	Hyabak 10ml			Sale	22 May 2014	-1	Kieran Dale
8470003997744	Hyabak 10ml			Sale	04 Feb 2014	-1	Mary Stone
8470003997744	Hyabak 10ml			Sale	26 Sep 2013	-1	Pauline Jones
8470003997744	Hyabak 10ml			Adjustment	02 Aug 2013	5	

Creating a stock adjustment for a frame already on the system

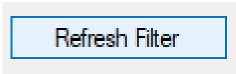
Click on the button ‘Get Frame or Sunspec’



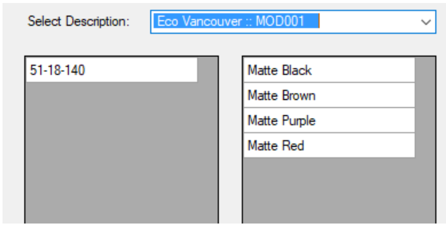


Type in part of the frame name or frame model number into the filter description box

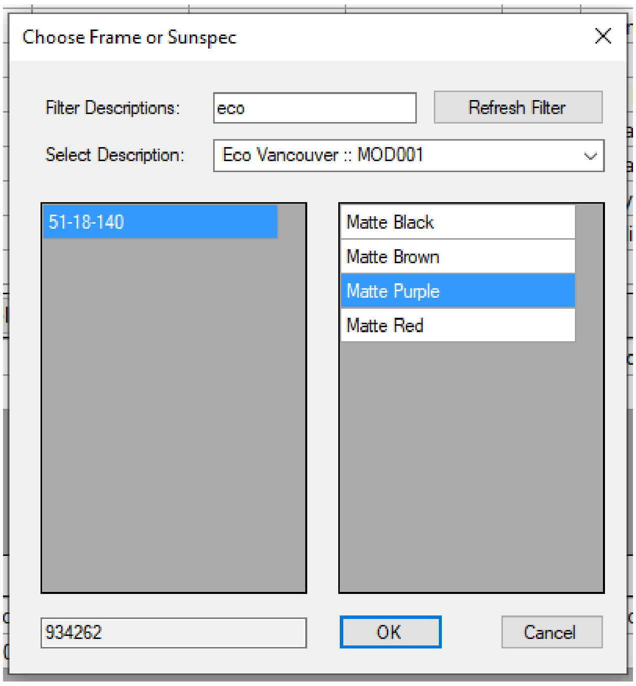
Click the ‘Refresh Filter’ button



Select the frame from the ‘Select Description’ drop-down.



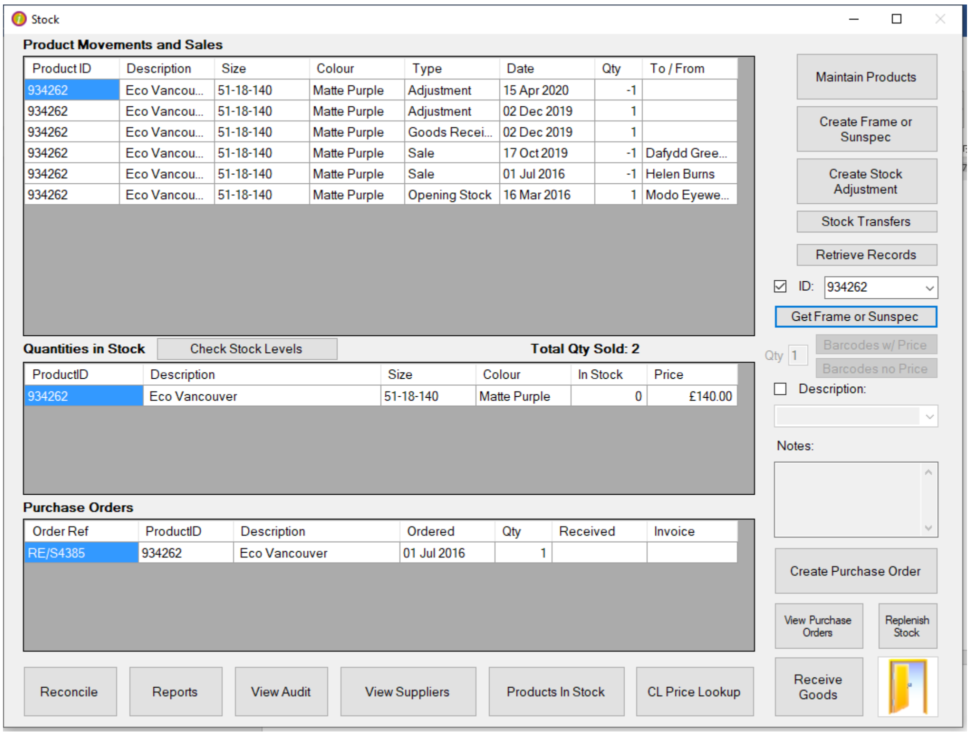
This will populate the columns with the available size and colour options.



Select the correct size and colour with a single click to highlight the correct fields.

Click ok.

The frame details will be displayed on the main stock form.



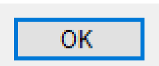
Click on the ‘Create Stock Adjustment’ button

Select an adjustment type from the adjustment type drop-down.

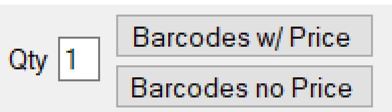
Enter the quantity of the stock adjustment.

If applicable you can enter more details about the adjustment e.g. select the supplier the products have been sent from.

Click Ok.



If you would like to print a barcode for this frame, then you can click either of the print barcode buttons.

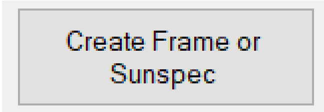


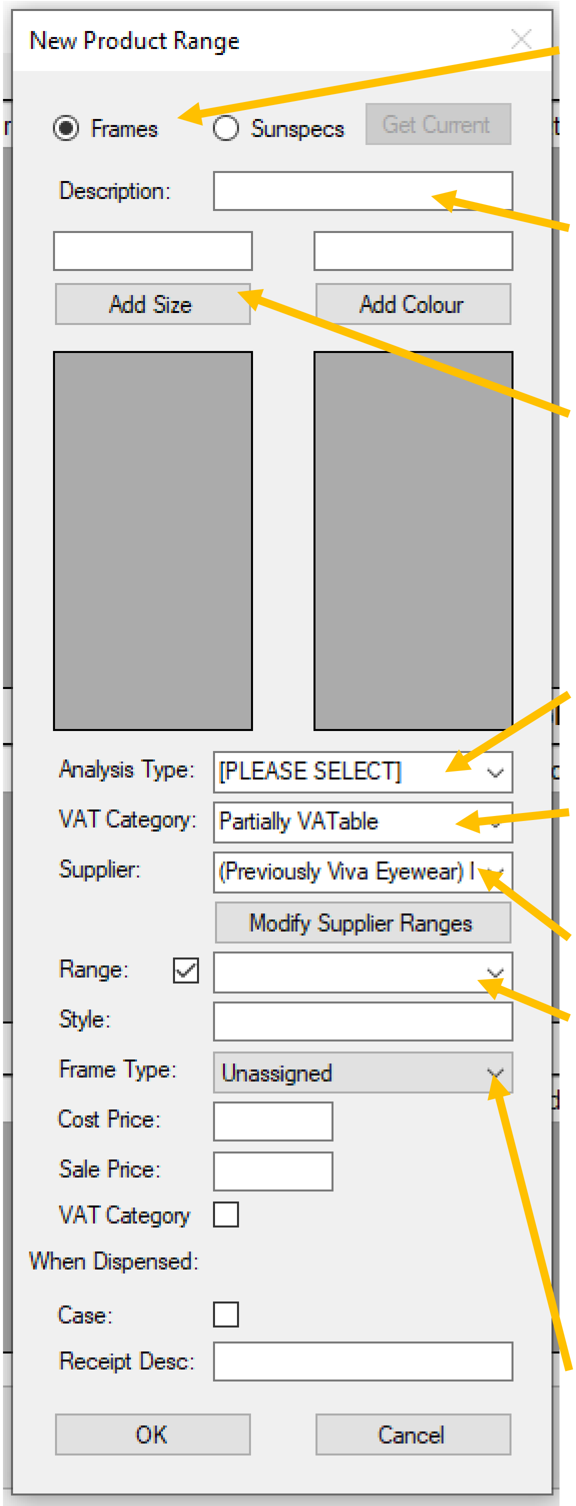
Barcodes w/Price = this will print a barcode with the frame price on

Barcodes no Price = this will print a barcode with no price on

Adding a new frame model to the stock system.

Click on the button ‘Create Frame or Sunspec’





Complete the fields on the ‘New Product Range’ form.

Select if you are adding an ophthalmic frame or a sunspec.

Type in the frame name or model number.

Type in the available size of the frame, then click the button ‘Add Size’. (Repeat this step if the frame is available in more than one size.)

Type in the available colour of the frame and click the button ‘Add Colour’. (Repeat this step for all the available frame colours of this frame you would like on the system.)

Select the correct Analysis Type for this frame from the drop-down list.

The VAT category should be automatically selected, so check this VAT category field and only amend in necessary.

Select the supplier of this frame from the drop-down.

Select from the drop-down the frame range.

If the appropriate frame range is not in the list, you can click the button ‘Modify Supplier Ranges’ to add it.

Style is a free type box that can be used to describe the style of the frame. It is not essential that this field is completed.

Select the Frame Type from the drop down

Enter the cost price and sale price of the frame.

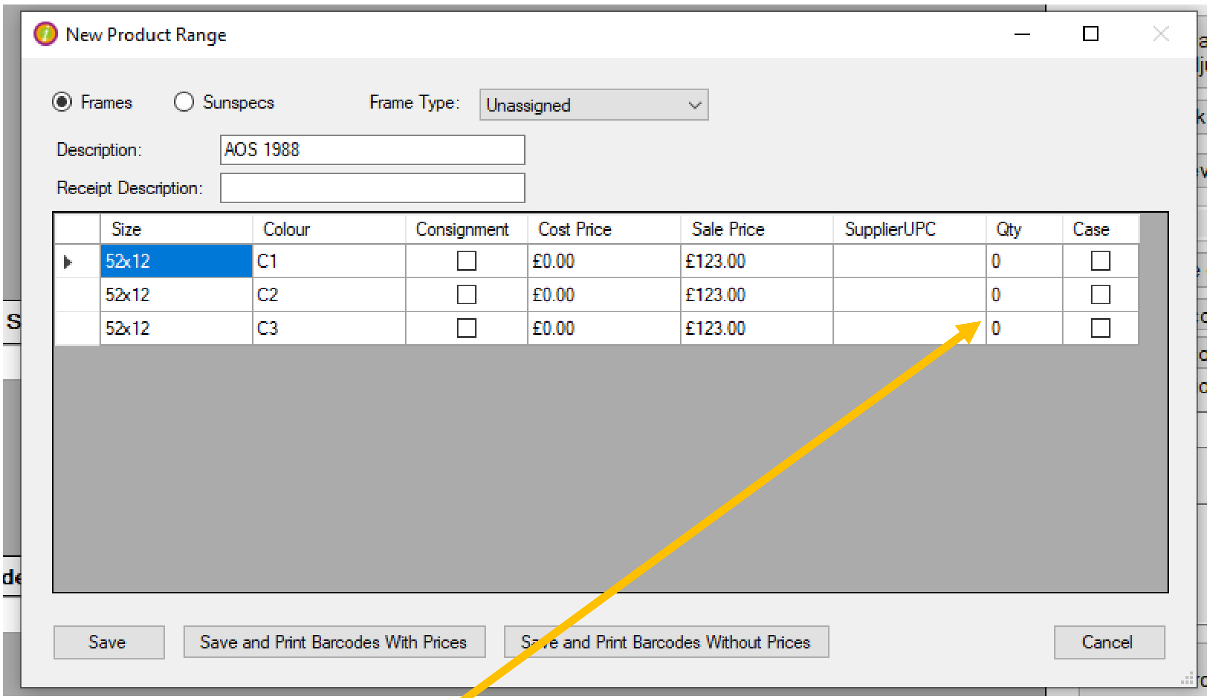
VAT Category When Dispensed: If you are adding a sunspec to the system, the VAT Category should be fully Vatable for when it is sold through the till as a plano product. You should tick the box next to VAT Category When Dispensed and select partially vatable so that when it is sold with prescription lenses it is recorded as a partially vatable product.

Case: Tick this box if the frame is supplied with a specific case. When you mark a job with this frame as checked and received you will receive a note that this frame is supplied with a case.

Receipt Desc: If you would like the receipt to print a different product description for this product you can enter this here. You would use this feature if you didn't want the full model description to print out on the patient receipt.

Once all the fields have been completed click 'OK'

A new window will open which allows you to add the stock quantities that have arrived for this frame model.



Enter the stock quantities here

Click either 'Save' or 'Save and Print Barcodes With Prices' or 'Save and Print Barcodes Without Prices'

The frame and its stock quantities will be entered onto the system and barcodes will print if the applicable button was clicked.

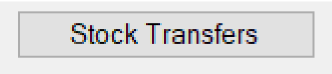
Stock Transfers

Stock transfers are used to create stock adjustments for multiple products in one go. Either because they are being sent back to the supplier or because they are being sent to another branch.

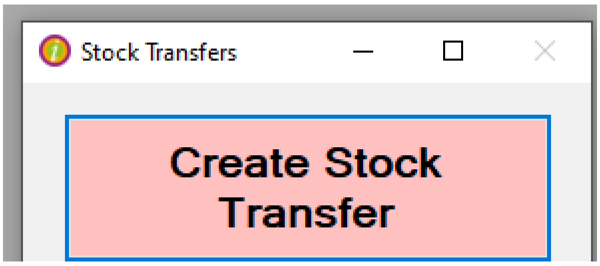
(*To record stock movements into the practice for more than one product at a time the purchase order system should be used. See our other documents and training videos on this subject*.)

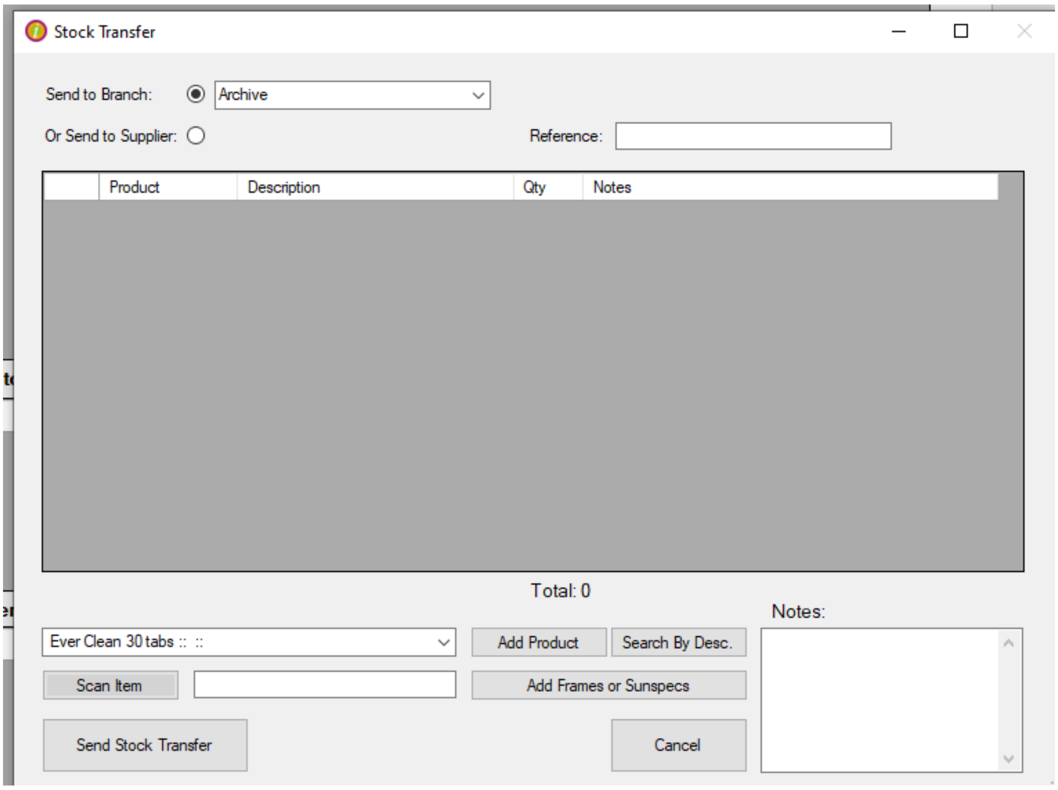
Creating a Stock Transfer

Click on the stock transfer button

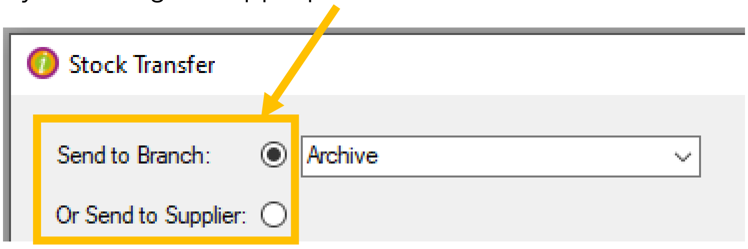


Click on the button 'Create Stock Transfer'





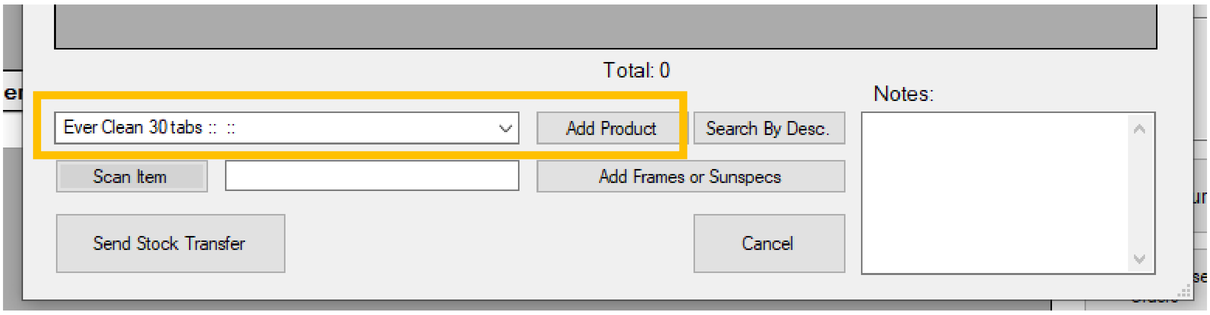
Select if you are sending this list of products to another branch or back to the supplier by selecting the appropriate bullet.



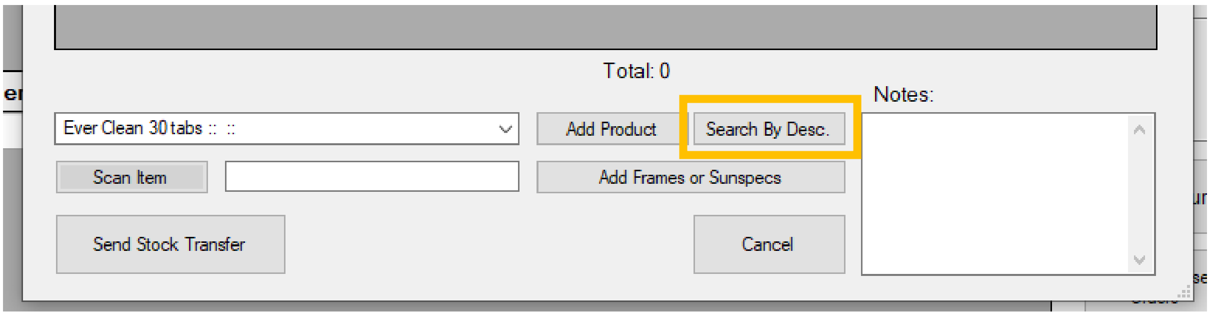
Select the supplier or the branch from the applicable drop down.

Type a reference for this transfer

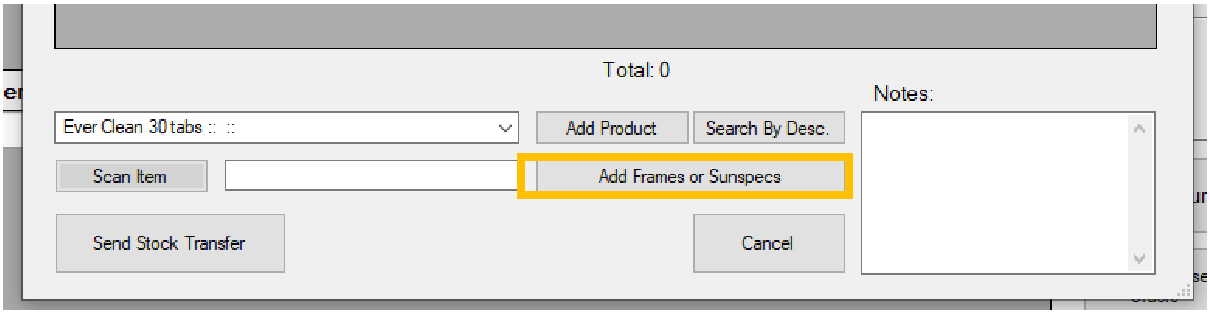
To add products to the stock transfer list either select a product from the drop down and, click ‘Add Product’.



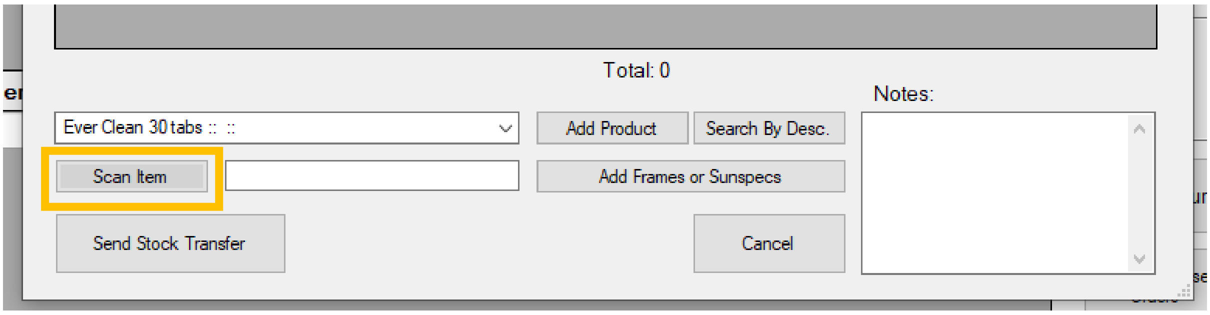
Or, click ‘Search by Description’. Type in the description of the product, click ‘Go’, select the product from the list and click ‘OK’



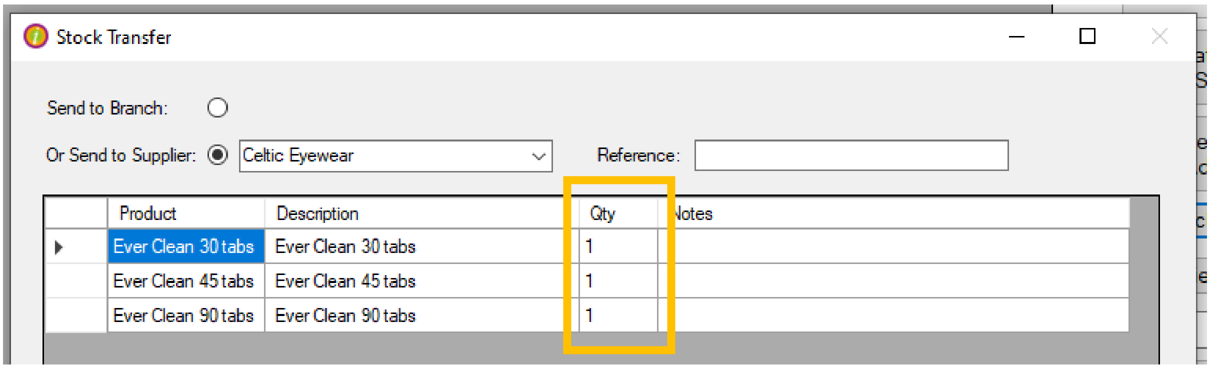
Or, click ‘Add frame or Sunspec’



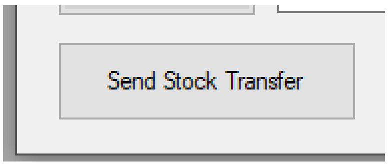
Or, Click ‘Scan Item’ and use your barcode scanner to scan a product barcode



Once the products included in the stock transfer have been added to the list, amend the quantities against each product line where applicable.



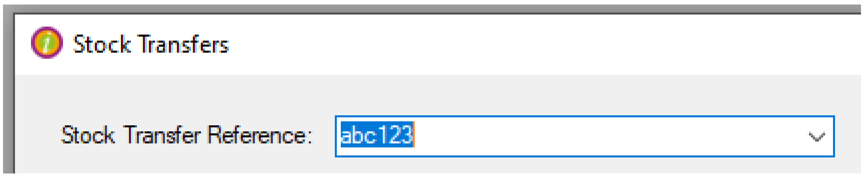
Once complete click ‘Send Stock Transfer’



Modifying a stock transfer

If you need to modify a stock transfer click on the ‘Modify Stock Transfer’ button.

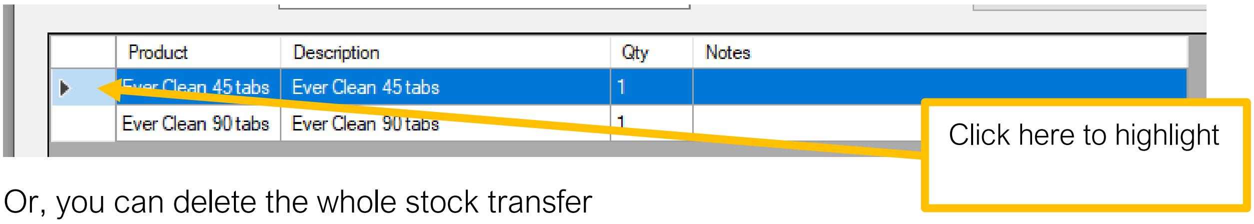
Select the stock transfer you want to modify from the drop down.



You can amend by adding extra products as described above.

You can amend the quantities of the products on the list.

You can delete a product line by highlighting it and then pressing the delete button on the keyboard.

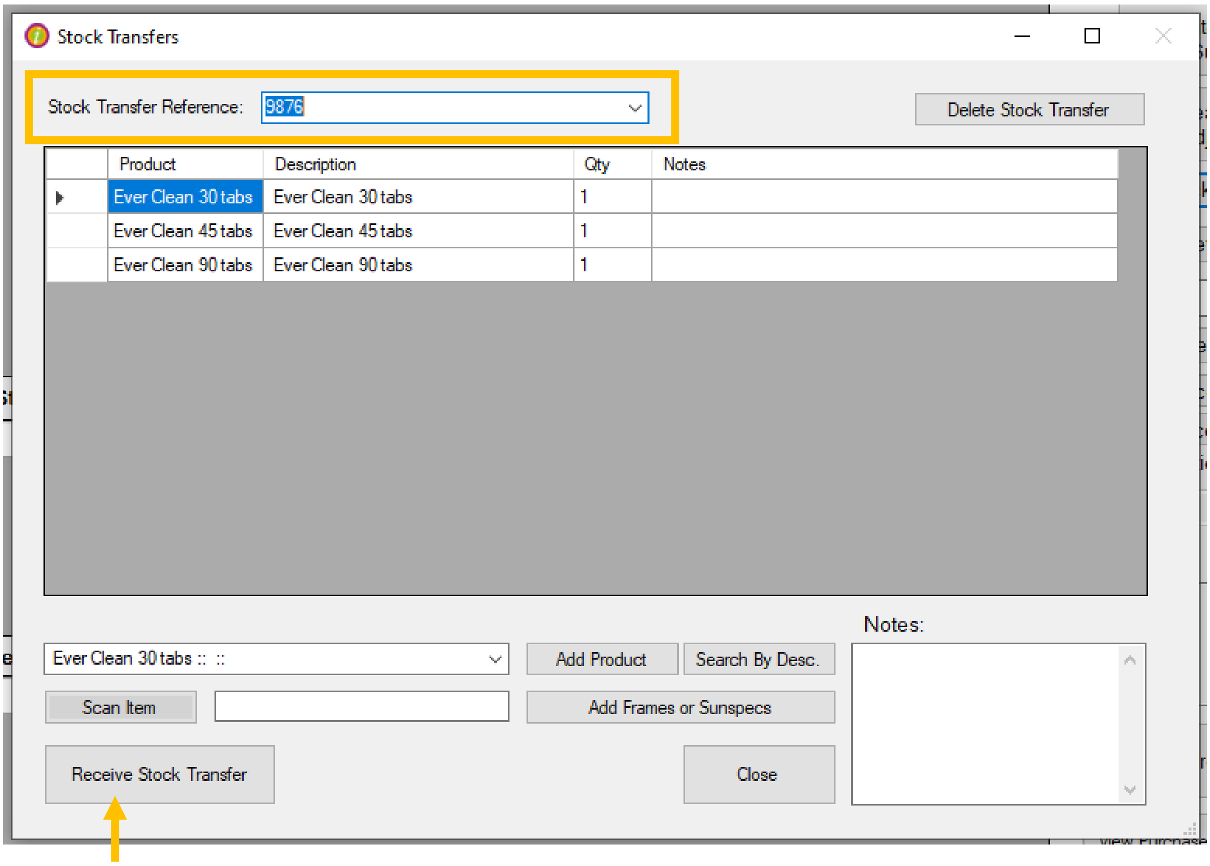


Or, you can delete the whole stock transfer

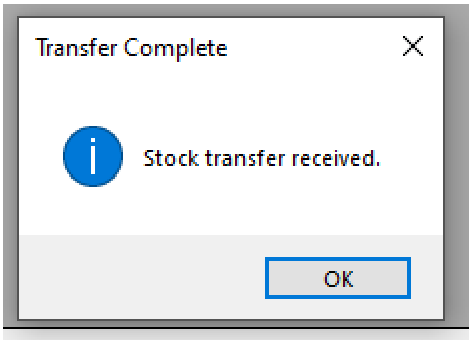
Receiving a stock transfer

Click on the receive stock transfer button.

Select the stock transfer you have received from the drop down.



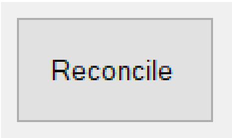
Click 'Receive Stock Transfer'



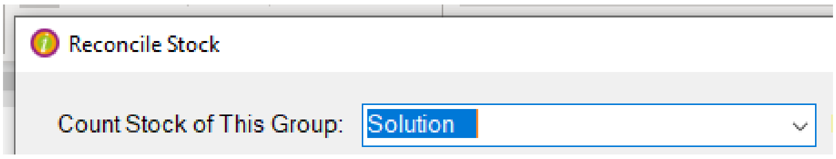
Stock Take (Reconcile Stock)

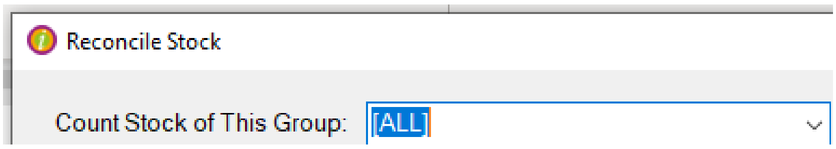
Reconciling stock in i-Clarity will require you to list all the products in your practice (you can do this in different product groups to make this process more manageable). When complete the stock take i-Clarity will compare this list you have created with the current stock values on i-Clarity and make any adjustments as necessary.

To begin a stock take, click the 'Reconcile' button.

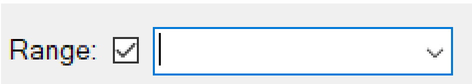


Select the product group you would like to so a stock take for or select all to stock take all the products in the practice.





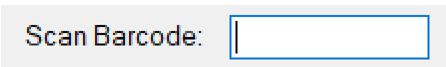
You can also break product groups down further into ranges if you need to stock take smaller groups more often.



Adding products to the reconcile list.

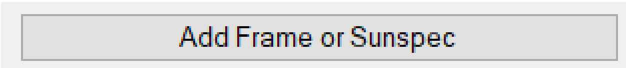
If you have set up your products so that they have barcode labels you can use your barcode scanner to add products to the list.

Click in the Scan Barcode box so that the cursor is in the box, begin to scan your products.

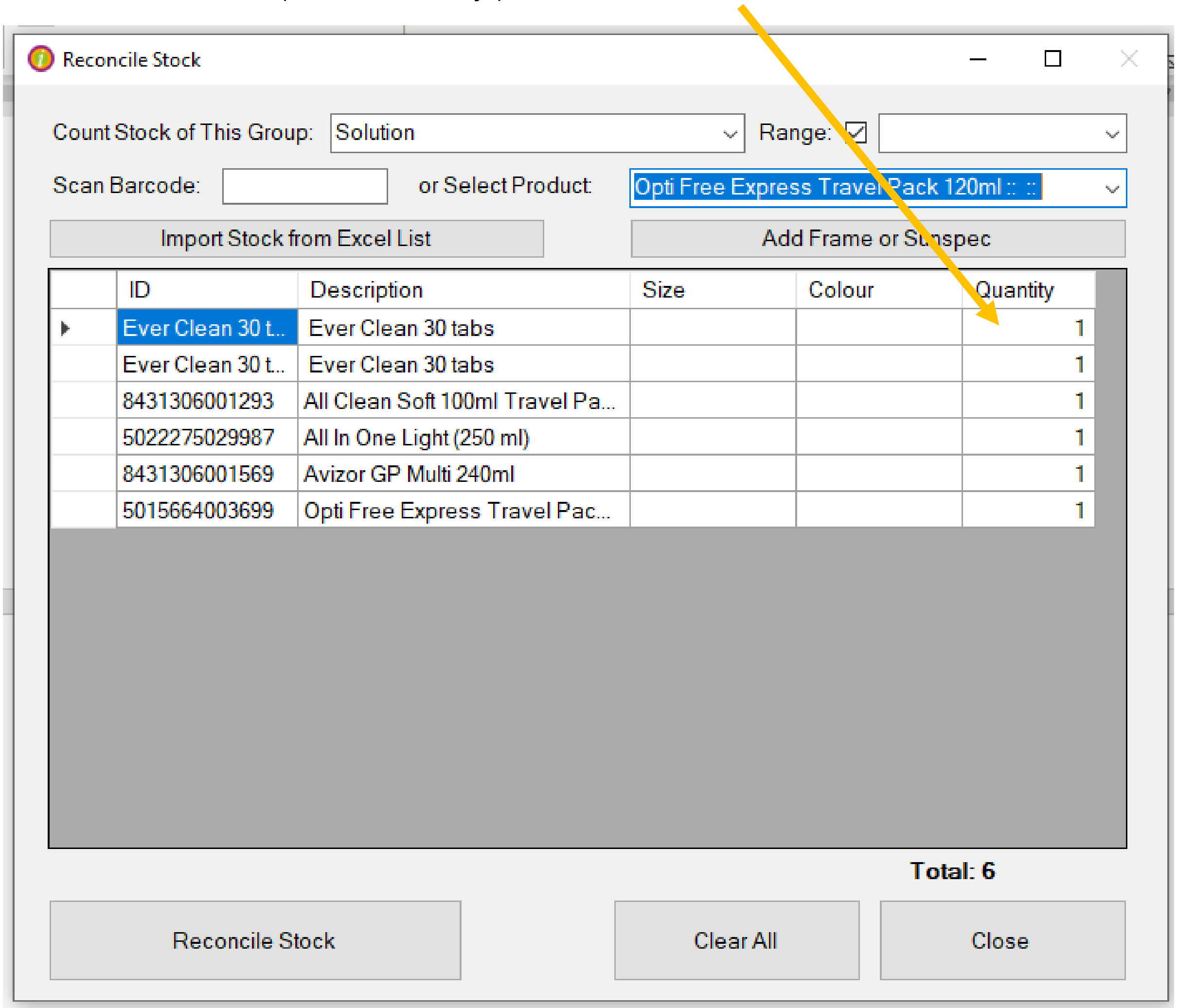


You can also add a product to the reconcile list by selecting a product from the drop down.

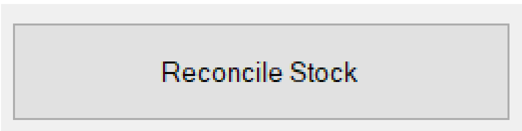
Or, by clicking the button 'Add frame or sunspec'.



You can amend the quantities of any product lines here



Once you have added all the products for the stated group (or range) click reconcile stock.

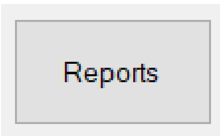


Important points

- You should ensure you have listed all products in the practice for the selected group before clicking reconcile. Any products missed off the reconcile will have to be individually recorded as in stock, using the 'Create Stock Adjustment' button.
- You can close out of the reconcile at any point and the items you have added to the list will stay recorded. This is useful if you need to deal with a patient request but it also allows you to switch PC's throughout the recording process, allowing you to be in the most convenient location for the stock you are recording.
- In order to speed up the stock recording process you can have the reconcile window open on more than one machine. Stock can be scanned into the reconcile list on each of these machines. Once you have scanned all the stock, close out of the reconcile list on all machines. Then reopen the reconcile list on one machine to click the reconcile button.

Once you have completed the stock reconcile you may find the following stock reports useful.

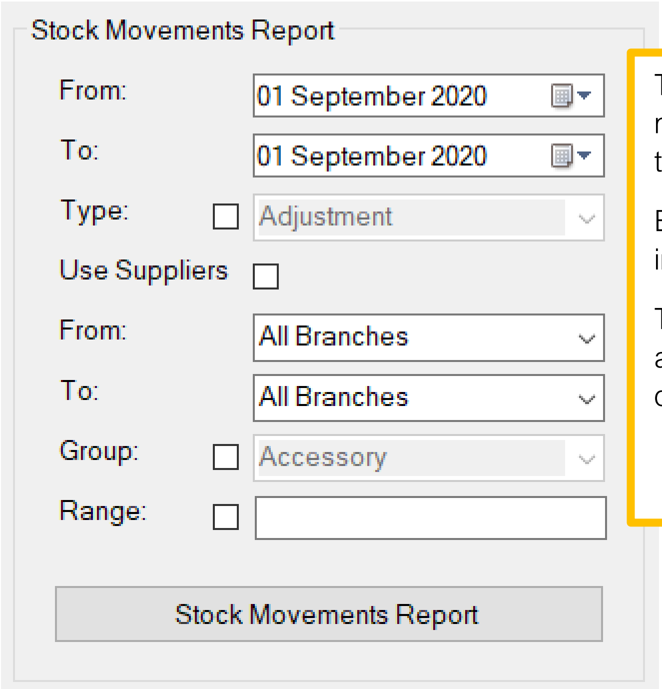
Click on the reports button



Stock valuation report

This report will list all the products now recorded as in stock on the i-Clarity system.

Stock movements report



To run this report to see how many adjustments were made to the system on a stock take

Enter the date of the stock take in the From and To dates.

Tick the box next to the type and select 'Adjustment' from the drop down

This report will show you all the stock adjustments made. This allows you to see how many adjustments needed to be made when the reconcile button was clicked.