

OPTERA Optifacts Enhanced Reporting Application

Available View Listing

View Name	Description	Category	Additional Notes
_3rd_party_fedtax	Shows the tax code, description, taxable amount and federal tax amount for an invoice billed to a third party account	Accounting	Only shows invoices for third party billing (Billing Type is "S" or "V" in the Account record)
_3rd_party_loctax	Shows the tax code, description, taxable amount and local tax amount for an invoice billed to a third party account	Accounting	Only shows invoices for third party billing (Billing Type is "S" or "V" in the Account record)
_3rd_party_statax	Shows the tax code, description, taxable amount and state tax amount for an invoice billed to a third party account	Accounting	Only shows invoices for third party billing (Billing Type is "S" or "V" in the Account record)
_3rd_party_tax	Shows, for a third party account and an invoice's ship to account, the tax code, description, taxable amount, invoice number and local, state and federal tax amount for that tax code	Accounting	Only shows invoices for third party billing (Billing Type is "S" or "V" in the Account record)
acc_n_pl_grp	Lists all price list entries for an account's (including account "0") price list groups with specifically assigned normal (non-progressive) price lists	Pricing	Does not include price lists not included in a price list group
acc_p_pl_grp	Lists all price list entries for an account's (including account "0") price list groups with specifically assigned progressive price lists	Pricing	Does not include price lists not included in a price list group
account_segment	Includes account address information from your database for accounts assigned to segments.	Account Data	Only available for Linux versions of Optifacts with the ar_segments table
acct_bal_120	Gives account names along with their current, 30 day, 60 day, 90 day and 120 day balances as of the last month end update	Account Data	This data is only as recent as the last month end update due to variability of the summ table if statements are run before month end. The date of the last month end update is in the as_of field. Only available for Linux systems with 120 day Accounts Receivables capabilities
acct_balance	Gives account names along with their current, 30 day, 60 day and 90 day balances as of the last month end update	Account Data	This data is only as recent as the last month end update due to variability of the summ table if statements are run before month end. The date of the last month end update is in the as_of field.
acct_contact	Includes account address information	Account Data	
acct_lens_sales	Includes account sales information from database. Including: Date mailed, Account number, Account name, Sales Rep, Territory, Style, lens count and the anal_mst.mst_link.	Sales	This is used in the Account_Lens_Sales query.
acct_netsales_view	Account net sales data.	Sales	Data will only appear for months in which statements have been run.
acct_month_totals	Pulls Account info from Account Table and balance due totals from ar_summ to give a total of invoice amounts monthly - what their statement showed at the end of the month.	Accounting	Make note that this is a total due for the month according to the total of each individual invoice not according to the printed statement sent to that customer at the end of that month.
acct_sales_view	Account Sales data.	Sales	Data will only appear for months in which statements have been run.
acct_terr	Account and Territory information	Misc	Shows the territory information for an account
acship_segment	Includes account shipping address information from your database for accounts assigned to segments.	Account Data	Only available for Linux versions of Optifacts with the ar_segments table
all_daily_l_cnt	Returns both the total lens count and the specific report group's lens count by day and account, including non lab supplied lenses	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
all_idlens_day	Counts the total number of lenses mailed out by day, account and report group, including non lab supplied lenses	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
all_lens_day	Counts the total number of lenses mailed out by day and account, including non lab supplied lenses	Sales	Counts by lenses.
alllens_cost	Shows the cost amount of lenses sold by account, dateout, style, material, color, and also by "supplied" – indicating if the job was an enclosed lens or not	Sales	A cost price list must be defined and applied if you wish to include this kind of cost. Custom configuration "SAVE INVENT COST" must be enabled at the time the job was run for inventory costs to be included.
alllens_credits	Shows the amount of RX credits entered through RX Credit Entry by account, dateout, style, material, and color	Sales	Only credits entered through RX Credit Entry are included

allens_sls	Shows the sales amount of lenses sold by account, dateout, style, material, color, and also by "supplied" – indicating if the job was an enclosed lens or not.	Sales	Rx credits and stock invoice jobs are not included. A 'N' in the "supplied" field indicates the job was an enclosed lens job – just sent in for coating or edging, etc. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
allens_sls_cnt	Shows the count of lenses sold by account, dateout, style, material, color, and also by "supplied" – indicating if the job was an enclosed lens or not.	Sales	Rx credits and stock invoice jobs are not included. A 'N' in the "supplied" field indicates the job was an enclosed lens job – just sent in for coating or edging, etc. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
analysis_tot_view	Lists sales for accounts on jobs.	Sales	Must have groups set up in grp_style in order to run this view (only available if you have version 6.0.2b or greater)
AntiReflective	Lists jobs by anal_dtl_dtl_link that go with any AR lite ups	Misc	Must have rpt_opts table set up for Antireflective lite ups = "ALL AR COATING"
areflect_jobnum	Lists jobs by mst_link and job number that go with any AR lite ups	Sales	Must have rpt_opts table set up for Antireflective lite ups = "ALL AR COATING"
avail_pr_opts	This view lists the Pricing options available(lite-ups on your lite up screen).	Pricing	This view includes row_master rows where is_lightup = "Y" and popts_num >=0 and disable_opt= "N".
br_sales_view	Branch Sales data.		Data will only appear for months in which statements have been run.
Brk_cnt	Counts the number of breakages per job	Misc	
brkg_per_day	Counts the number of lenses scanned through Verify as a 'Breakage' for an account per day	Production	Only shows transactions for lenses with skus. Jobs must be scanned through Verify as a 'Breakage'
brkg_stn_dtl	Shows the station date, description, and lens info for jobs scanned into breakage stations in tray track	WIP/Production	Only shows data for stations with a station type of "B" for Breakage
co_sales_view	Company Sales data	Sales	Data will only appear for months in which statements have been run.
custom_cfg	Wrapper for the cust_cfg table	Misc	
daily_job_cnt	Returns both the total job count and the specific report group's job count by day and account	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
daily_lens_cnt	Returns both the total lens count and the specific report group's lens count by day and account	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
days_per_job	Calculates the number of days a job was in the lab	Production	<input type="checkbox"/> Does not take into account non-working days
detail_id	Links the analysis detail records with the rpt_opts table by matching the lite-up text with the user entered report group from the Customer Lens Report	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
DrillMounts	Lists jobs by anal_dtl_dtl_link that go with any drill mount lite ups	Misc	Must have rpt_opts table set up for Drill mount lite ups = "DRILL"
frame_credit_info	Links the frame description table with the analysis and job data tables to show what kinds of frames have been used with regards to credits	Sales	Frame's sku must be in the o_frm_desc table in order to show up
gr_mgn_cr	Shows the total credit amount by account for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night.
gr_mgn_ds	Shows the total discount amount by account for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night.
gr_mgn_rx	Shows the RX sales, breakage and cost amounts by account and general style (ASPH, MULTIF, PROG or SV) for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night.
gr_mgn_st	Shows the stock sales by account for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night.
gr_mgn_wr	Shows the total warranty credit amount by account for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night. Only shows information for warranty credits entered through our Warranty program.
gross_margin	Shows the RX sales, stock sales, cost, breakage amount, credits and total warranty credits by account for a reporting period using the ar_reps table, which can be automatically filled from the invoice table every night.	Sales	The AR HTML report tables must be maintained and set to run automatically every night. Only shows information for warranty credits entered through our Warranty program.
id_suppl_acg_sls	Sums the total item cost and sales amount for supplied lens jobs mailed out by day, account and report group by account group	Sales	Only includes Supplied Lenses – no RX or RX credits
id_suppl_cnt	Returns a count of supplied lens jobs mailed out by day, account and report group.	Sales	Only includes Supplied Lenses – no RX or RX credits

<u>id_suppl_jpd_acg</u>	Counts the total number of supplied lens jobs mailed out by day, account and report group by account group	Sales	Only includes Supplied Lenses – no RX or RX credits
<u>idjobs_per_day</u>	Counts the total number of jobs mailed out by day, account and report group.	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
<u>idjobsperday_acg</u>	Counts the total number of jobs mailed out by day, account and report group by account group	Sales	Does not include enclosed lenses or RX credits
<u>idlens_per_day</u>	Counts the total number of lenses mailed out by day, account and report group.	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2).
<u>interface_stns</u>	Shows the station date, description, and lens info for jobs scanned into stations in tray track assigned to an equipment interface port	WIP/Production	Only shows data for stations with an equipment interface port assigned
<u>inv_archive_view</u>	List of RX Invoices and ship_to information to be used for tax purposes for ELOA. Will not include invoices added through add transactions.	Accounting	If reporting on intra company sales must have groups set up in Account Grouping. Needs to be run before month end update is done. Will include all rx invoices but will NOT include any invoices entered through add transactions.
<u>inv_register_view</u>	Invoice information from the inv table with account information.	Accounting	Does NOT include payments discounts or unapplied credits. Must run before Month End Update - If run after Month End Update, their will be no data.
<u>inv_stk_arch_view</u>	List of Stock Invoices and ship_to information to be used for tax purposes for ELOA. Will not include invoices added through add transactions.	Accounting	If reporting on intra company sales must have groups set up in Account Grouping. Needs to be run before month end update is done. Will include all stock invoices but will NOT include any invoices entered through add transactions.
<u>inv_view</u>	Invoice amounts by account/date/patient name. Can be grouped into account groups (only available if you have version 6.0.2b or greater).	Accounting	Includes both rx and stock invoices and credits. Does NOT include payments, discounts, or unapplied amounts. Must have grp_acct entries in order to group by account groups (only available if you have version 6.0.2b or greater). Only includes invoice data from the time the last Month End Update was run.
<u>invent_cost</u>	Shows lens SKUs, unit_cost, on hand quantity, order quantity and stocked status	Lens Data	Only includes lens information available in your lens database.
<u>Invoice_Details</u>	Lists details of invoices for a user specified date range. Includes: Invoice number, Enter date, ship date, Job type, lens type, PAL manufact, Pal name, lens material, lens color, Drill mount (Y/N), AR coating, polarized (Y/N), number of breakages, Tinted (Y/N), Redo type (if any), ECP name, ECP phone, ECP address, ECP city, ECP state, ECP zip	Misc	Must have rpt_opts table set up for 3 different groups: Antireflective lite ups = "ALL AR COATING", Drill mount lite ups = "DRILL MOUNT" , All Redo lite ups = "REDU"
<u>invt_lensInfo</u>	Includes the Lens info for searches	Lens Data	Only includes lens information available in your lens database.
<u>invt_trans</u>	Shows lens info for different inventory transactions - orders, breakages, receipts	Lens Data	Will only show data for lenses with SKUs
<u>job_frame_info</u>	Links the frame description table with the analysis and job data tables to show what kinds of frames have been used with regards to sales data	Frames	Frame's sku must be in the o_frm_desc table in order to show up
<u>jobs_in</u>	Links the tray, inv, and acct tables to show details about jobs based on the day and time they came into the lab	Sales	This view is linked with the inv table which is cleared out after the Month End Update. It will only show jobs that have been entered since the last Month End Update. This view shows two account numbers - tray_accode and inv_accode. If these two are different, the tray_accode indicates the VSP account and the inv_accode indicates the originating doctor's account
<u>jobs_per_day</u>	Counts the total number of jobs mailed out by day and account	WIP/Production	Counts by jobs, not by lenses.
<u>jobsperday_acgrp</u>	Counts the total number of jobs mailed out by day and account for a user specified account group	WIP/Production	Does not include enclosed lenses or RX credits.
<u>jpd_stgrp_acgrp</u>	Counts the total number of lenses mailed out by day and account for a user specified account group and a user specified lens type group	Sales	Works best if an account group and a style group is specified. Does not include enclosed lenses or RX credits. Counts by lenses – not by jobs
<u>late_jobs</u>	Shows traynum, tray_station, sub_desc, station_date, station_time, date_needed, time_needed, accode, patname, invnum, datein, notes_time, notes_date, notes applied to overdue jobs.	Production	This report will only show data for tray track stations that are not Mailout or Cancel stations
<u>lens_acct</u>	Lists all jobs, their mst_link, with account code, lens type and job count.	Production	Must have reports set up for lens types
<u>_lens_by_date</u>	Selects Date_in, anal_under (when frame type is displayed, Breakage count and a lens count	Production	This report will only show data for tray track stations that are not Mailout or Cancel stations.
<u>_lens_by_frame</u>	Selects Date_in, time_in, anal_under (when frame type is displayed, Breakage count and a lens count	Production	This report will only show data for tray track stations that are not Mailout or Cancel stations.
<u>_lens_per_day</u>	Counts the total number of lenses mailed out by day and account	WIP/Production	Counts by lenses.

<u>lens_sales_cnt</u>	Count of lens sales by account, manufacturer, style, color, material and lens type. Does not include credits or lenses that are not lab supplied.	Sales	Counts by lenses. RX credits are not included.
<u>liteup_totsales</u>	Lists all lite ups associated with an invoice along with the cost and price of that lite up only.	Sales	This report only gives the cost or the sales amount for that particular lite up - it will not include the rest of the job cost/price. You must have report groups set up in rpt_opts table (5)(7)(7)(2).
<u>no_chrg_jobs</u>	Shows the dateout, account information, job number and invoice number for all jobs with the NO CHARGE lite-up	Misc	The NO CHARGE lite-up does not get logged in the anal_dtl table, so it can only be tracked by finding the jobs that do not have any value other than \$0 in the item_amt field
<u>norm_g_pl_view</u>	Lists all price list entries for price list groups with specifically assigned normal (non-progressive) price lists	Pricing	Does not include price lists not included in a price list group
<u>norm_pkg_plist</u>	Lists all price list entries for a price list package with specifically assigned normal (non-progressive) price lists	Pricing	Does not include price lists not included in a price list package
<u>norm_pl_view</u>	Lists all price list entries for accounts (including account "0") with specifically assigned normal (non-progressive) price lists	Pricing	Does not include price groups or copays
<u>pair_sales</u>	Counts the number of pairs sold per day by account, material, style, and lens type	Sales	Counts by pairs, so it will show half pairs where applicable
<u>pay_hist_view</u>	Listing of a specific account as well as all accounts (seperated) payment history within a specified date range.	Accounting	Must have HTML reporting set up and customer must run HTML process monthly. Information includes Discounts and Payments.
<u>polar_sls</u>	Shows the sales amount of polarized lenses sold by account, dateout, style, material, color, and also by "supplied" – indicating if the job was an enclosed lens or not.	Sales	The color code must be marked as Polarized in the Color Database. Rx credits and stock invoice jobs are not included. A 'N' in the "supplied" field indicates the job was an enclosed lens job – just sent in for coating or edging, etc. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
<u>polar_sls_cnt</u>	Shows the count of polarized lenses sold by account, dateout, style, material, color, and also by "supplied" – indicating if the job was an enclosed lens or not.	Sales	The color code must be marked as Polarized in the Color Database. Rx credits and stock invoice jobs are not included. A 'N' in the "supplied" field indicates the job was an enclosed lens job – just sent in for coating or edging, etc. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
<u>prog_g_pl_view</u>	Lists all price list entries for price list groups with specifically assigned progressive price lists	Pricing	Does not include price lists not included in a price list group
<u>prog_pkg_plist</u>	Lists all price list entries for a price list package with specifically assigned progressive price lists	Pricing	Does not include price lists not included in a price list package
<u>prog_pl_view</u>	Lists all price list entries for accounts (including account "0") with specifically assigned progressive price lists	Pricing	Does not include price groups or copays
<u>Redos</u>	Lists jobs by anal_dtl_dtl link that go with redo lite ups	Misc	Must have rpt_opts table set up for All Redo lite ups = "REDU"
<u>redo_acct</u>	Lists all jobs marked as a redo in the lite up screen, with account code, redo description, lens type, count of redo # and the table link to that lite up	Production	Must have "REDU" report and groups set up in the rpt_opts table and must have reports set up for lens types
<u>rpt_ids</u>	Shows a list of all available Report IDs from the rpt_opts table	Sales	
<u>sales_analysis</u>	Gross Sales by Style with Option to Report on a Specific Progressive (only available if you have version 6.0.2b or greater).	Sales	Rx credits are included. Must have groups set up in grp_style in order to run this view (only available if you have version 6.0.2b or greater). Includes Invoice Total Sales amount, not just lens category. Output will be dependent on Lab General Config "Save Sls Anl" setting in months. Customer needs grp_style.unl file loaded located in /usr1/nextrel6/unld_files on opti7.
<u>sales_ar</u>	Uses _sales_analysis and links it to the mat_mst, lens_types_mst and the anal_dtl to get a list of lenses sold with antireflective coating.	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2) labeled as "ALL AR COATING" and must also have report groups set up in order to run it.
<u>sales_count</u>	Sales Job Count by Style with Option to Report on a Specific Progressive (only available if you have version 6.0.2b or greater).	Sales	Rx credits are NOT included. Must have groups set up in grp_style in order to run this view (only available if you have version 6.0.2b or greater). Output will be dependent on Lab General Config "Save Sls Anl" setting in months. Customer needs grp_style.unl file loaded located in /usr1/nextrel6/unld_files on opti7.
<u>sales_lens_count</u>	Uses _sales_count and links it to the col_mst, mat_mst and lens_types_mst to get a better detail of what types of sales have been made	Sales	Rx credits are NOT included. Must have groups set up in grp_style in order to run this view (only available if you have version 6.0.2b or greater). Output will be dependent on Lab General Config "Save Sls Anl" setting in months.

_sales_lens_sales	Uses _sales_analysis and links it to the col_mst, mat_mst and lens_types_mst to get a better detail of what types of sales have been made	Sales	Rx credits are included. Must have groups set up in grp_style in order to run this view (only available if you have version 6.0.2b or greater). Includes Invoice Total Sales amount, not just lens category. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
_shipper_view	Built for a courier to be able to view necessary information about items shipping from the lab	Shipping	Originally made for the UPS courier to be able to get the information needed for shipments queried by invoice number.
_sku_invent_view	Combines sku, ln_rec and invt_rec tables (lens sku assignment tables).	Inventory	This query will take some time to run because it is looking at EVERY sku and inventory record in the system.
_stn_liteup_grp	Shows the number of "good" lenses put through a particular tray track station (not including breakages) based on dateout, style, material, color, liteup group, manufacturer, and "supplied" – indicating if the job was an enclosed lens or not	Production	This view is best used when specifying a date range, rpt_id and station number(s) to see the number of jobs passed through in that date range with specific lite-ups.
_stock_credits	Sales dollars on jobs entered through stock pricing (not layout) with an invoice amount less than 0.0	Sales	Only includes negative invoice amounts entered through stock pricing
_stock_frame_sls	Shows frame information for stock jobs	Sales	Must use frame inventory. Only shows sales information since the last month end update.
_stock_gross_sls	Sales dollars on jobs entered through stock pricing (not layout) with an invoice amount greater than 0.0	Sales	Only includes positive invoice amounts entered through stock pricing
_stock_jobs	Sales Count on jobs entered through stock pricing (not layout).	Sales	Does not include a count of credits entered through stock pricing. Count is per job entered, not per product.
_stock_sales	Sales Dollars on jobs entered through stock pricing (not layout).	Sales	Includes credits entered through stock pricing.
_supp_lens_count	Sales Count on jobs where the lenses are supplied by the doctor or patient (edging, coatings, etc).	Sales	Rx credits are NOT included. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
_supp_lens_sales	Sales Dollars on jobs where the lenses are supplied by the doctor or patient (edging, coatings, etc).	Sales	Rx credits are included. Output will be dependent on Lab General Config "Save Sls Anl" setting in months.
_terr_sales_view	Territory Sales data.	Sales	Data will only appear for months in which statements have been run.
_Trans_AR	Shows, for a specific date range, how many transition lenses with AR have been sold	Sales	Must have AR report and groups set up in the rpt_opts table (5)(7)(7)(2) labeled as "ALL AR COATING".
_unapp_credit_now	Shows the most up-to-the-moment balance of unapplied credit for an account	Accounting	Does not show individual transactions. Only shows the most recent balance of unapplied payments
_unapp_credit_then	Shows the total calculated amount of unapplied credit added or subtracted for a statement period by account	Accounting	Only shows for months where statements have already been run. Does not show individual transactions - just total for that statement period
_unpaid_invoice	Shows the most current balance due by unpaid invoice for open-item accounts	Accounting	Only shows mailed-out invoices that still have an unpaid balance on them for open-item accounts. Calculated the unpaid balance by subtracting any payments or credits made on the invoice in the current statement period
_usg_per_day	Counts the number of lenses scanned through Verify as a 'Usage' for an account per day	Production	Only shows transactions for lenses with skus. Jobs must be scanned through Verify as a 'Usage'
_warr_jobs	Shows the dateout, job_number and lite-up for jobs with the WARRANTY lite-up or for jobs with lite-ups added to the rpt_opts table under the Report ID of "OPTERA WARRANTY"	Misc	Must have OPTERA WARRANTY report and groups set up in the rpt_opts table to report on any liteup other than WARRANTY
_warr_invs	Shows the dateout, invoice number and lite-up for invoices with the WARRANTY lite-up or for invoices with lite-ups added to the rpt_opts table under the Report ID of "OPTERA WARRANTY"	Misc	Must have OPTERA WARRANTY report and groups set up in the rpt_opts table to report on any liteup other than WARRANTY
_wip_cost	Shows job numbers, last edited dates, skus and unit cost for all jobs still considered as Work-In-Progress (WIP) by Optifacts	WIP/Production	There will be two records for most job numbers - one for each lens. This will not show cost for jobs that have no sku printed on the ticket. Old jobs may appear on this report. Job numbers and last edited dates are supplied to help track down any jobs that have been lost track of in the lab
_wip_view	Shows station date and time, description, date and time needed, days in the lab, days in the station, days overdue (negative if job is still on time), invoice information and lens info for jobs still considered Work In Process in tray track	WIP/Production	This will only show data for trays that are in tray track that have not been mailed out or cancelled