Stock Handling Module

Getting Started

Strato

auditdata

Your Partner in Audiology Solutions

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1 Module Overview

Strato Stock Handling Module is an add-on module that installs the stock handling functionality to your Strato system. With this module, you can:

- Add suppliers and their data to your Strato system.
- Create articles and accessories that you will supply to your clients.
- Handle your own stock of hearing aids – deliver or lend them to clients.
- Keep track of any consignment stock that is supplied to you by Hearing Aids manufacturers.

2 Module Essentials

The below image gives an overview of the basic parts of the **Strato Stock Handling Module**.
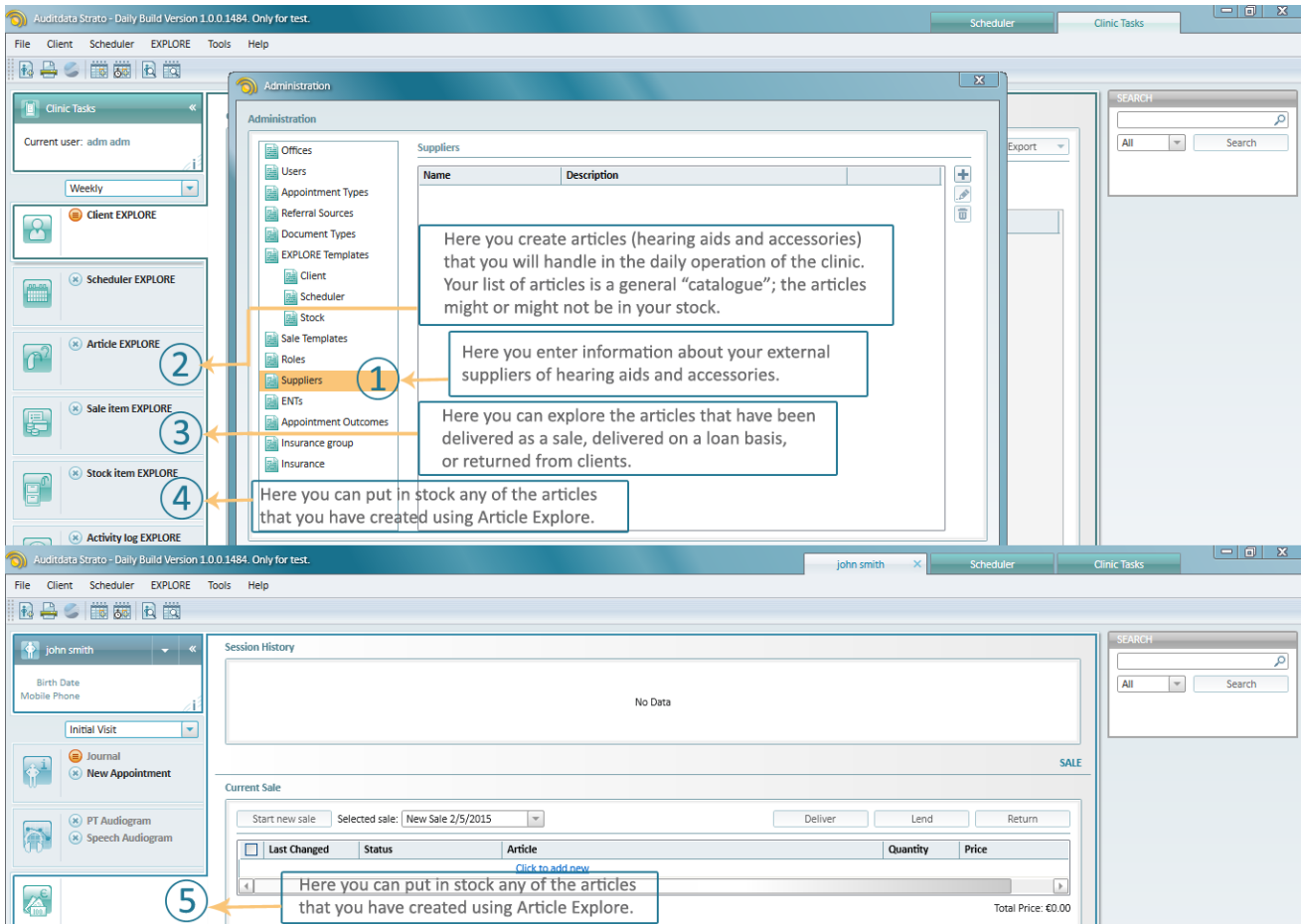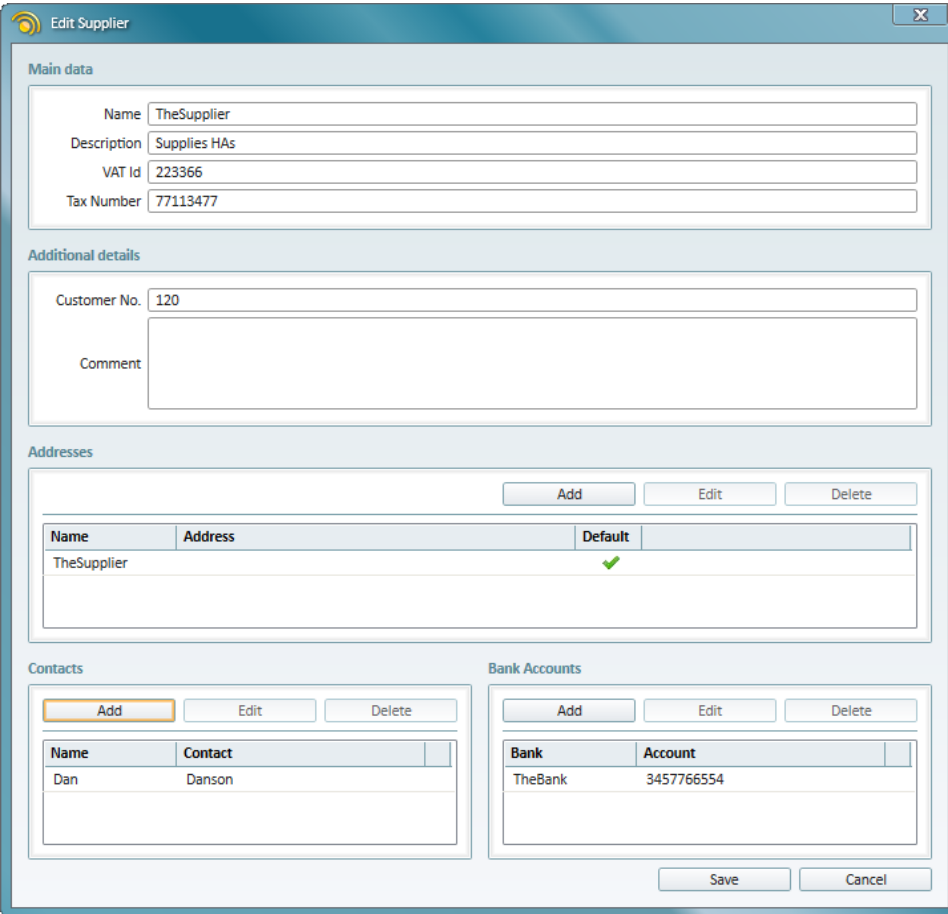
3 Creating Suppliers, Articles, and Stock Items

To start using the **Strato Stock Module**, you need to create:

1. Suppliers.
2. Articles.
3. Stock Items.

3.1 Creating Suppliers

To add a new supplier:

1. Navigate to **Administration > Suppliers**.
2. Click the **+** (plus) button and enter the required information. Then click **Save**.

If you want to add more details later, click the **pencil** icon at the right to edit a supplier.
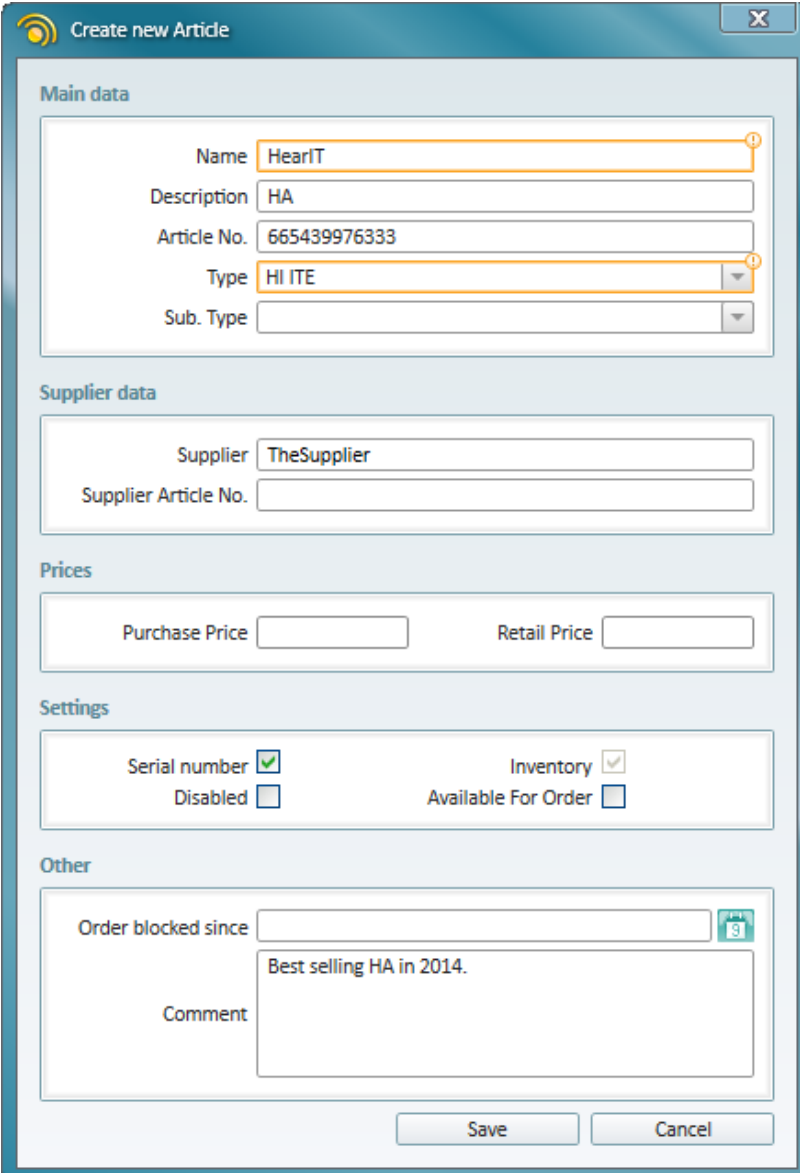
3.2 Creating Articles

To create a new article:

1. Navigate to **Clinic Tasks > Article EXPLORE**.
2. Click the **New article** button. In the **Create new Article** dialog that opens, enter the required information.
3. If the **Inventory** option is checked, it means that an article must be in stock if you want to deliver it.
4. If you check the **Serial number** option, please note that you will need to enter a serial number of an item when placing an article in stock.

5. Click **Save** when finished. Your article has been added.
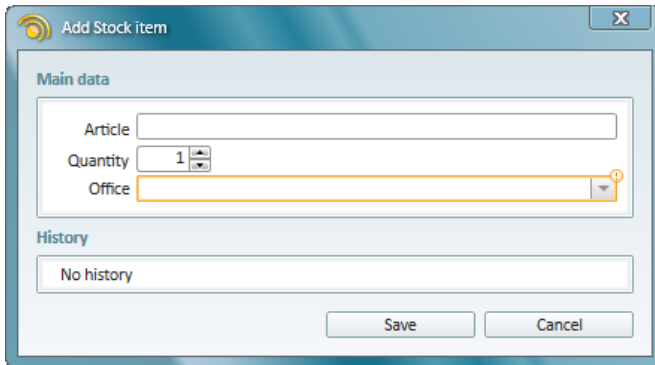
3.3 Adding Stock Items

To add a new item to the stock:

1. Navigate to **Clinic Tasks > Stock item EXPLORE**.
2. Click the **New Stock item** button. The **Add Stock item** dialog opens.

3. In the **Article** field, specify the first letter of any article you previously added and then select an appropriate article from the list. Once it is done, you will see 2 new sections (**Commission and Serial Numbers**) appeared in the dialog.

   Note: With each increased number in the **Quantity** option, a new field for a serial number appears in the **Serial Numbers** section.
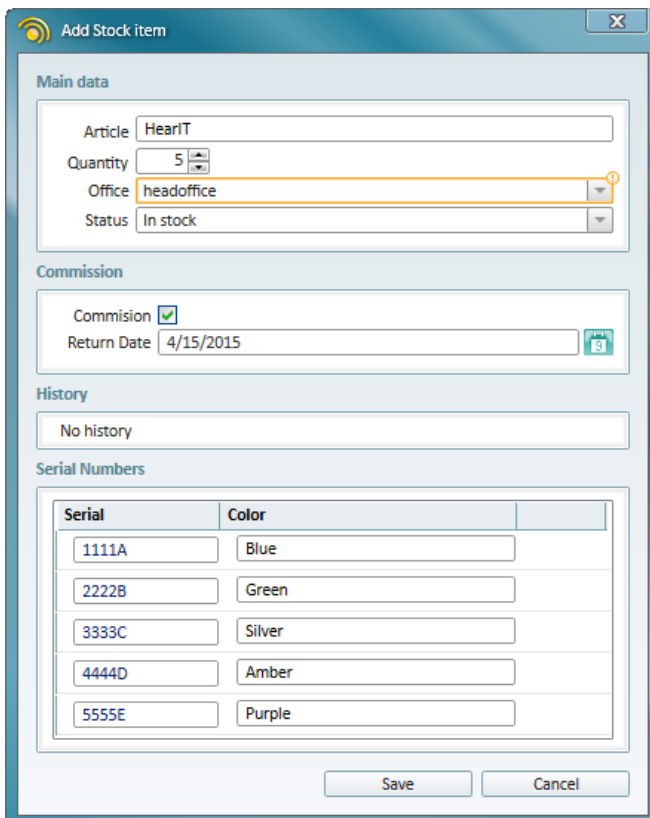
4. Select an office and specify a status for this stock item.
5. To indicate that stock items are in commission from a supplier, check the **Commission** box and select the date of return from a calendar (if applicable).
6. Last, specify a serial number and color for every item type and click **Save**. Your stock item has been added.
7. Now click the **Search** button to find all the stock items, and you will see that a stock list has been updated with your items.

Stock item EXPLORE

| | Search | Open template ... | New Stock item | Export ▼ |

General
Article
Client Data

Filter [▼]

6 stock item(s) found:

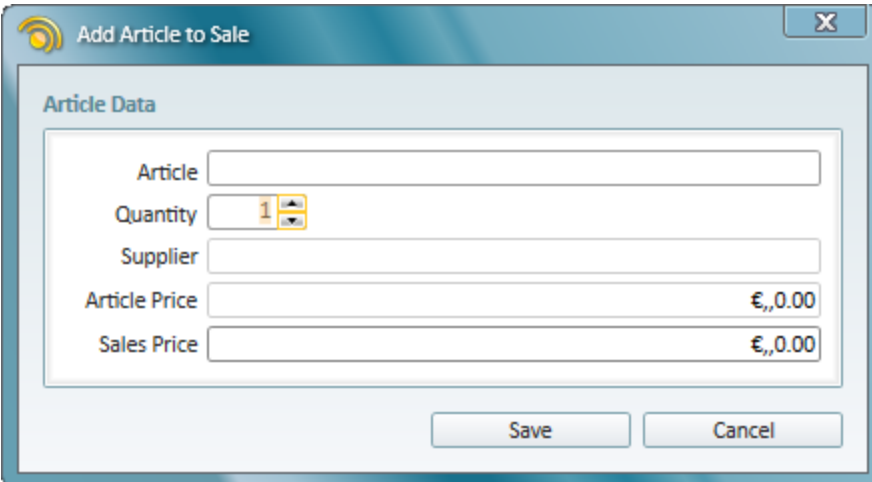|	Article ty...	Client	Col...	Quantity	Commissi...	Commission return date	Office	Serial numbe
☐	Other			17	☐		Anna	
☐	HI ITE		Blue	1	☑	4/15/2015	headoffice	1111A
☐	HI ITE		Green	1	☑	4/15/2015	headoffice	2222B
☐	HI ITE		Silver	1	☑	4/15/2015	headoffice	3333C
☐	HI ITE		Amber	1	☑	4/15/2015	headoffice	4444D
☐	HI ITE		Purple	1	☑	4/15/2015	headoffice	5555E

4 Managing Sale Items

4.1 Delivering and Lending Hearing Aids

To deliver or lend a Hearing Aid to a client:

1. Choose a client and navigate to the **Sale** icon on the left navigation pane.
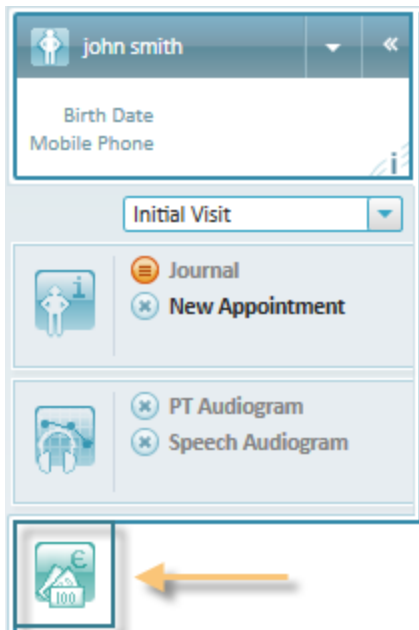
2. Click the **Click to add new** link to open the **Add Article to Sale** dialog.

3. In the **Article** field, specify the first letter of any article you previously added and then select an appropriate article from the list. The **Properties Left** section will now appear where you can add an extra information about this item.

4. Click **Save** to add an article to sale and then select a checkbox to the left of the item. The item is now ready for delivery or lending.

5. Click the **Deliver** button to open the **Sale Delivery** dialog. **Note:** The **Office** (where the item is stored) and the **Serial** fields are mandatory for saving an item for delivery.

6. Click **Save**. You will see that the status of the item has been changed to **Delivered**.

7. Select another item with status **New** and now click the **Lend** button if you want to lend an item to a client. **Note:** The **Office** (where the item is stored) and the **Serial** fields are mandatory for saving an item for lend.

8. Click **Save**. You will see that the status of the item has been changed to **Lent**.

4.2 Delivering Accessories that are not in Your Stock

To deliver an accessory which is not passed through your stock to a client:

1. Ensure that an accessory is defined as an article with the **Serial Number** and **Inventory** boxes unchecked:.

2. Repeat the steps 1 through 6 from the topic Delivering and Lending Hearing Aid, and the updated sales item list now looks like this:
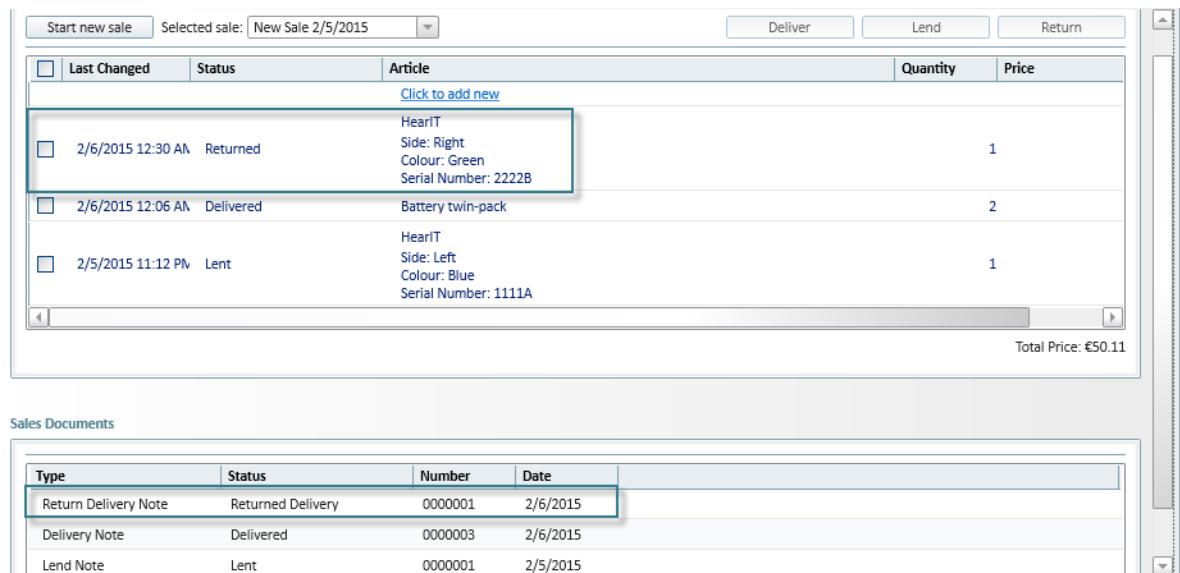
4.3 Returning Hearing Aids to Stock

To return a hearing aid back to stock:

1. Select an item you want to return and click the **Return** button. You will get a warning message. Click **Yes** if you want to continue.
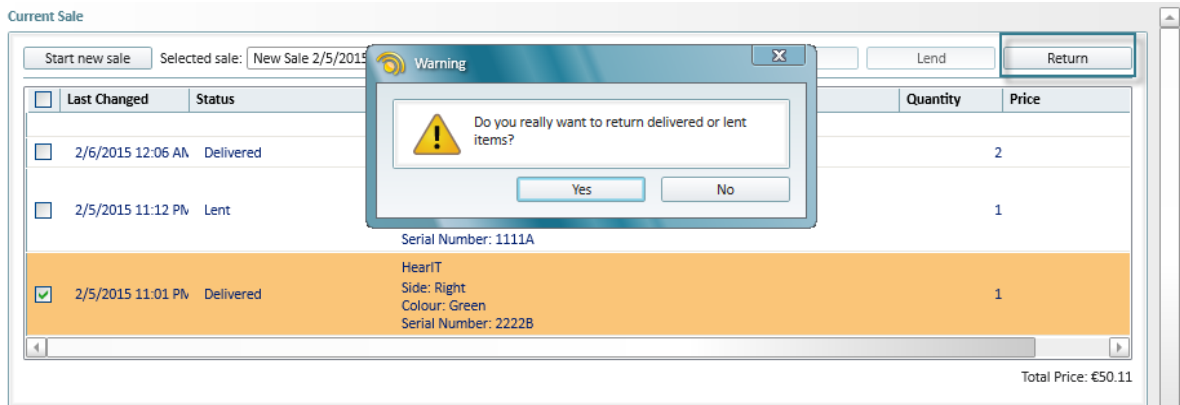
2. The **Sale Items'** list will be updated:

3. The item is now put back in stock, and the stock list is also updated - the item status changed from **Delivered** to **In Stock**.

The stock before returning of an item:

The stock after returning of an item:

5 Exploring Stock Items

5.1 Exploring Articles
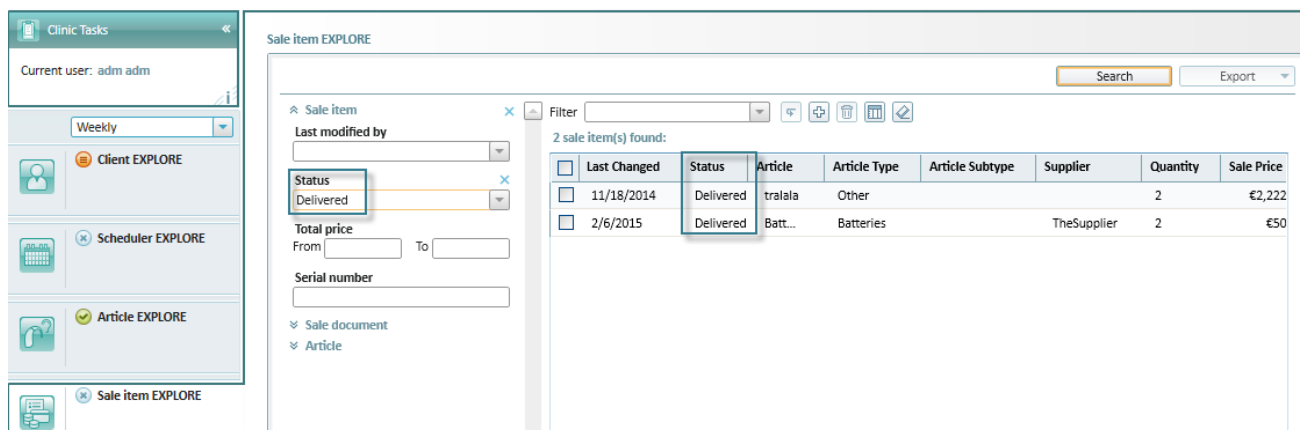
To explore articles:

1. Navigate to **Clinic Tasks > Article EXPLORE**.
2. Enter a relevant search criteria (if applicable) and press the **Search** button. The article(s) with your search criteria will be shown.
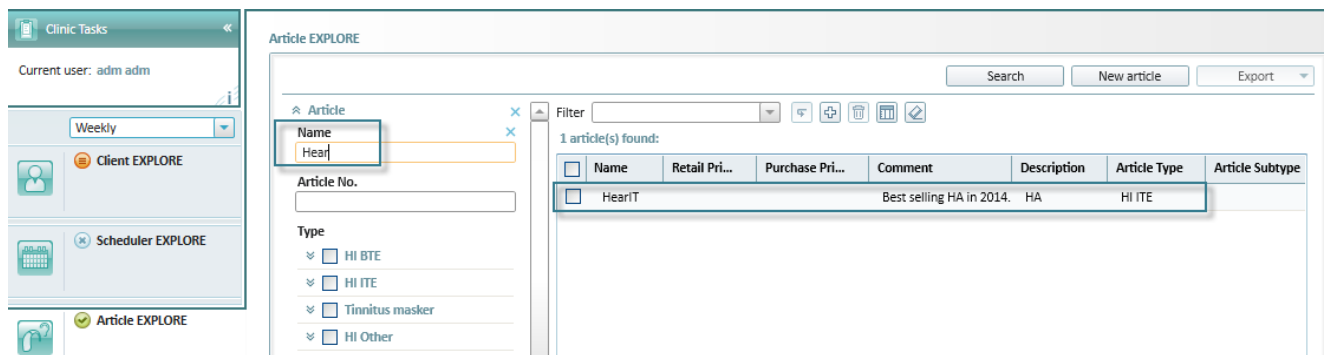
5.2 Exploring Sale Items

To explore sale items:

1. Navigate to **Clinic Tasks > Sale item EXPLORE**.
2. Enter a relevant search criteria (if applicable) and then press the **Search** button. The sales items matching your search criteria will be shown.

5.3 Exploring Stock

To explore the stock:

1. Navigate to **Clinic Tasks > Stock item EXPLORE**.
2. Enter a relevant search criteria (if applicable) and then press the **Search** button. The stock item(s) matching your search criteria will be shown.
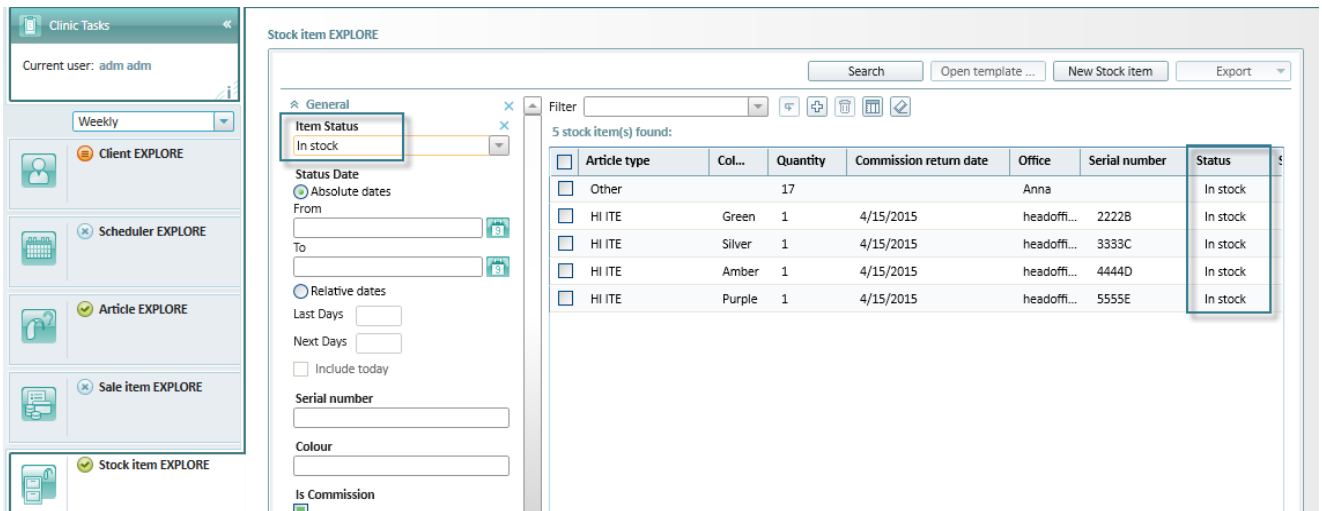
To explore the commission stock:

1. Check the **Is Commission** box in the search criteria pane, and then press the **Search** button. The commission-stocked item(s) will only be shown.