# Stock Handling Module Getting Started









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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.

Auditdata Strato - Daily Build Version 1.	0.0.1484. Only for test.	Scheduler	Clinic Tasks
File Client Scheduler EXPLORE	Tools Help		
🖪 🚔 🥌 🗰 🐻 🖻 📖 —		(X)	
	Multiple Administration		SEARCH
Clinic Tasks «	Administration		
Current user: adm adm	Constant American	Export	All Search
ai <sup>2</sup>	Grices Suppliers		
Weekly	B Users Name Description		
Client EXPLORE	Appointment Types	<i>.</i> ∕	
	here you create articles (hearing and and acce		
Scheduler EXPLORE	That you will handle in the daily operation of th		
	Scheduler Your list of articles is a general "catalogue"; the	e articles	
	might or might not be in your stock.		
Article EXPLORE	Sale Templates		
( <b>2</b> )	Here you enter information about your exte	ernal	
	suppliers of hearing aids and accessories.		
Sale item EXPLORE	ENTS Appointment Outcomes Here you can explore the articles that have been	en	
Sale item EAPLONE	delivered as a sele delivered as a loss having		
	insurance group delivered as a sale, delivered on a loan basis, insurance or returned from clients.		
Stock item EXPLORE			
Stock item EXPLORE	Here you can put in stock any of the articles		
	that you have created using Article Explore.		
Activity log EXPLORE			
Auditdata Strato - Daily Build Version 1.	0.0.1484. Only for test.	john smith × Scheduler	Clinic Tasks
File Client Scheduler EXPLORE	Tools Help		
🗈 🖴 🥥 🗰 🐻 🖻 📖 —			
<b>53</b>	Session History		SEARCH
🏫 john smith 🛛 👻 «	Session History		
Birth Date			All Search
Mobile Phone	No Data		
Initial Visit			
Journal			SALE
New Appointment			SALE
	Current Sale		
PT Audiogram	Start new sale Selected sale: New Sale 2/5/2015 V	Deliver Lend Return	
Speech Audiogram	Last Changed Status Article	Quantity Price	
	Click to add new Here you can put in stock any of the articles		
(5)	that you have created using Article Explore.	Total Price: €0.	
	that you have created using Article Explore.	Iotal Price: EU.	



# **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.

Edit Supplier						2
ain data						
Name	TheSupplier					
	Supplies HAs					
VAT Id	223366					
Tax Number	77113477					
lditional details						
Customer No.	120					
Comment						
dresses						
				Add	Edit	Delete
Name	Address			Defa	ult	
TheSupplier				~	•	
ntacts			Ba	ank Accounts		
Add	Edit	Delete		Add	Edit	Delete
Name	Contact		ווה	Bank	Account	
Dan	Danson			TheBank	3457766554	
					Save	Cancel

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

Suppliers		
Name	Description	
John Loe		
TheSupplier	Supplies HAs	1



# **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.

Sreate new Article		X
Main data		
Name	HearIT	_Ľ
Description	HA	
Article No.	665439976333	
Туре	HI ITE	F
Sub. Type		-
Supplier data		
Supplier	TheSupplier	
Supplier Article No.		$\exists \Box$
ouppiler Article No.		
Prices		
Purchase Price	Retail Price	
Settings		
Serial number	Inventory 🗹	
Disabled		
Other		
Order blocked since		6
	Best selling HA in 2014.	
Comment	_	
Comment		
	Save Cancel	

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.

(The second stock it	em		X
Main data			
Article			
Quantity	1		
Office			<b>v</b>
History			
No history			
		Save	Cancel

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.

3 Add Stock	item			X
Main data				
Article	HearlT			
Quantity	5			
Office	headoffice			<b></b>
Status	In stock			-
Commission				
Commisi Return Da	on 🔽 ate 4/15/20	)15		
History				
No history				
Serial Number	rs			
Serial		Color		
1111A		Blue		)
2222B		Green		]
3333C		Silver		]
4444D		Amber		)
5555E		Purple		
			Save	Cancel



- 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.

		-	-	Sei	arch Ope	n template New Stock	item	Export
⊗ General	Filter		-					
× Article	6 stock item(	s) found:						
	Article	ty Client	Col	Quantity	Commissi	Commission return date	Office	Serial num
	Other			17			Anna	
	HI ITE		Blue	1	$\checkmark$	4/15/2015	headoffice	1111A
	HI ITE		Green	1	$\checkmark$	4/15/2015	headoffice	2222B
	HI ITE		Silver	1	$\checkmark$	4/15/2015	headoffice	3333C
	HI ITE		Amber	1	$\checkmark$	4/15/2015	headoffice	4444D
	HI ITE		Purple	1	<b>~</b>	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.

joh	n smith 👻 <
Birth Mobile Pl	
	Initial Visit
† <sup>i</sup>	<ul> <li>Journal</li> <li>New Appointment</li> </ul>
	<ul> <li>PT Audiogram</li> <li>Speech Audiogram</li> </ul>
	-

2. Click the Click to add new link to open the Add Article to Sale dialog.

<b>()</b> A	dd Article to	Sale		X
Artic	le Data			
	Article Quantity Supplier	1		
	Article Price			€,,0.00
	Sales Price			€,,0.00
			Save	Cancel

 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.



(The formation of the f	to Sale
Article Data	
Article	
Supplie	
Ear Side	e Left 💌
Article Price	e€,,,0.00
Sales Price	e€,,,0.00
Properties Left	]
Colour	purple
Comment	2 items of this colour left.
	Save Cancel

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.

Start new sale Selected sale: New Sale 2/5/2015			Deliver	Lend	Return
Last Changed	Status	Article		Quantity	Price
		Click to add new			
☑ 2/5/2015 10:04 PN	New	HearlT Side: Right Colour: purple			1
2/5/2015 9:57 PM	New	HearlT Side: Left Colour:			1

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.

	1	Office: headoffice	Delivery date 2/5/2015
		L	
ntity Available	e Serial	Warranty Exp. Date	Comment
	1		
1	2222B	2/5/2017	
	-		
		ntity Available Serial	



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

rent Sale		
Start new sale Sele	cted sale: New Sale 2/5/2015	T
Last Changed	Status	Article
		Click to add new
2/5/2015 11:01 PM	Delivered	HearlT Side: Right Colour: Green Serial Number: 2222B

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.

nd					
Client john smith				Office: headoffice	Lend date 2/5/2015
and Items		1			
Article	Quantity	Available	Serial	Warranty Exp. Date	Comment
HearIT			-		
Side: Left	1	N/A	23312	2/5/2017	1

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

Current Sale		
Start new sale Selec	ted sale: New Sale 2/5/2015	-
Last Changed	Status	Article
		Click to add new
2/5/2015 11:12 PN	Lent	HearlT Side: Left Colour: Blue Serial Number: 1111A



# 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:.

S Edit Article	X
Main data	
Name	Battery twin-pack
Description	
Article No.	12
Туре	Batteries
Sub. Type	· · · · · · · · · · · · · · · · · · ·
Supplier data	
Supplier	TheSupplier
Supplier Article No.	
Prices Purchase Price Settings	Retail Price €,,25.00
Serial number Disabled	
Other	
Order blocked since	
Comment	
	Save Cancel

2. Repeat the steps 1 through 6 from the topic <u>Delivering and Lending Hearing Aid</u>, and the updated sales item list now looks like this:

Last Changed	Status	Article	Quantity	Price
		Click to add new		
2/6/2015 12:06 /	AN Delivered	Battery twin-pack		2
2/5/2015 11:12	PN Lent	HearlT Side: Left Colour: Blue Serial Number: 1111A		1
2/5/2015 11:01	P∿ Delivered	HearlT Side: Right Colour: Green Serial Number: 2222B		1

Current Sale



# 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.

Current Sale		
Start new sale Selected sale: New Sale 2/5/20	11 🕥 Warning	Lend Return
Last Changed Status		Quantity Price
	Do you really want to return delivered or lent items?	
2/6/2015 12:06 AN Delivered	Lems:	2
2/5/2015 11:12 Plv Lent	Yes No Serial Number: 1111A	1
2/5/2015 11:01 PN Delivered	HearlT Side: Right Colour: Green Serial Number: 22228	1
		•
		Total Price: €50.11

2. The Sale Items' list will be updated:

	Start new sale Select	ted sale: New Sale 2/5/2015	*			Deliver	Lend	Return
	Last Changed	Status	Article				Quantity	Price
			Click to add new					
F	] 2/6/2015 12:30 AN	Returned	HearlT Side: Right Colour: Green Serial Number: 22	22B				1
	2/6/2015 12:06 AN	Delivered	Battery twin-pack					2
HearT 2/5/2015 11:12 PN Lent Side: Left Colour: Blue Serial Number: 1111A								
4								►
								Total Price: €50.11
iles D	locuments							
Ту	pe	Status	Number	Date				
R	eturn Delivery Note	Returned Delivery	0000001	2/6/2015				
D	elivery Note	Delivered	0000003	2/6/2015	·			
Le	end Note	Lent	0000001	2/5/2015				

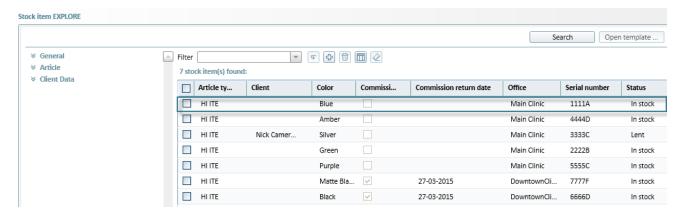
3. The item is now put back in stock, and the stock list is also updated - the item status changed from **Delivered** to **In Stock**.



#### The stock before returning of an item:

k item EXPLORE										
								Se	arch Ope	n template
6 General	📥 F	ilter (		•	5 <del>6</del> 0	III 🖉				
℅ Article ℅ Client Data		7 stoc	k item(s) found	:						
Circin Data			Article ty	Client	Color	Commissi	Commission return date	e Office	Serial number	Status
			HI ITE	Nick Camer	Blue			Main Clinic	1111A	Delivere
			HI ITE		Amber			Main Clinic	4444D	In stock
			HI ITE	Nick Camer	Silver			Main Clinic	3333C	Lent
			HI ITE		Green			Main Clinic	2222B	In stock
			HI ITE		Purple			Main Clinic	5555C	In stock
			HI ITE		Matte Black	$\checkmark$	27-03-2015	DowntownClinic	7777F	In stock
			HI ITE		Black	<b>V</b>	27-03-2015	DowntownClinic	6666D	In stock

#### 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.

Clinic Tasks «	Article EXPLORE								
Current user: adm adm						Sea	rch	New article	Export
Weekly	* Article	× ▲ ×	Filter 1 article(s) found:		• • • <b>1</b>				
Client EXPLORE	Hear Article No.		Name	Retail Pri	Purchase Pri	Comment	Description	Article Type	Article Subtype
			HearlT			Best selling HA in 2014	. HA	HI ITE	1
Scheduler EXPLORE	Туре								
Scheduler EXPLORE	× HIBTE × HITTE								

### 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.

Clinic Tasks «	Sale item EXPLORE									
Current user: adm adm								Search		Export 💌
Weekly	Sale item     Last modified by	Filter	e item(s) found:		• • 4	1 🗖 🖉				
Client EXPLORE	Status		Last Changed	Status	Article	Article Type	Article Subtype	Supplier	Quantity	Sale Price
	Delivered		11/18/2014	Delivered	tralala	Other			2	€2,222
Scheduler EXPLORE	Total price From To Serial number		2/6/2015	Delivered	Batt	Batteries		TheSupplier	2	€50
Article EXPLORE	<ul> <li>✓ Sale document</li> <li>✓ Article</li> </ul>									



# 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.

urrent user: adm adm						Search Open templ	ate N	ew Stock item	Export
Weekly	☆ General Item Status In stock	× ×	 ck item(s) found:	Ŧ	<b>₽</b> ₽(	1			
Client EXPLORE	Status Date	-	Article type	Col	Quantity	Commission return date	Office	Serial number	Status
	Absolute dates		Other		17	1	Anna		In stock
	From		HIITE	Green	1	4/15/2015	headoffi	2222B	In stock
Scheduler EXPLORE	То	9	HI ITE	Silver	1	4/15/2015	headoffi	3333C	In stock
		1	HIITE	Amber	1	4/15/2015	headoffi	4444D	In stock
Article EXPLORE	Relative dates		HI ITE	Purple	1	4/15/2015	headoffi	5555E	In stock
	Last Days Next Days								-
	Include today								
Sale item EXPLORE	Serial number								
Stock item EXPLORE	Colour								

#### 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.

Clinic Tasks «	Stock item EXPLORE									
Current user: adm adm							Search Open temp	late N	ew Stock item	Export 👻
Weekly	Relative dates     Last Days	<b></b>	Filter 4 sto	ock item(s) found:	Ŧ	F 🕂 1	1 🔲 🖉			
Client EXPLORE	Next Days			Article type	Col	Quantity	Commission return date	Office	Serial number	Status 5
Scheduler EXPLORE	Include today			HI ITE	Green	1	4/15/2015	headoffi	2222B	In stock
	Serial number			HI ITE	Silver	1	4/15/2015	headoffi	3333C	In stock
				HI ITE	Amber	1	4/15/2015	headoffi	4444D	In stock
	Colour			HI ITE	Purple	1	4/15/2015	headoffi	5555E	In stock
Article EXPLORE	Is Commission ×									
Sale item EXPLORE	Absolute dates     From     To     To     To									
Stock item EXPLORE	Relative dates									