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# Stock Handling Module

## Getting Started

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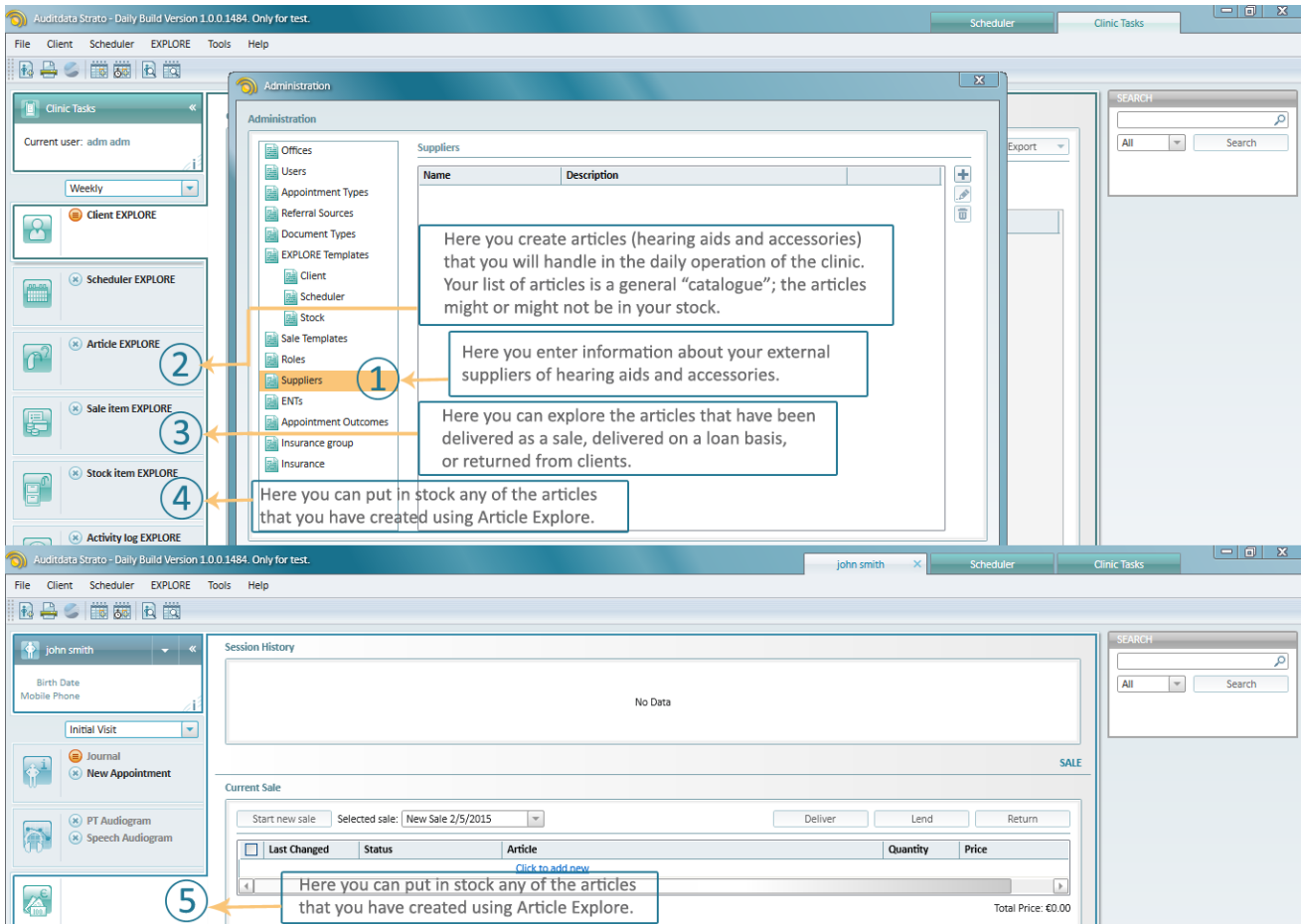
# 1 Module Overview

**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**.



## 3 Creating Suppliers, Articles, and Stock Items

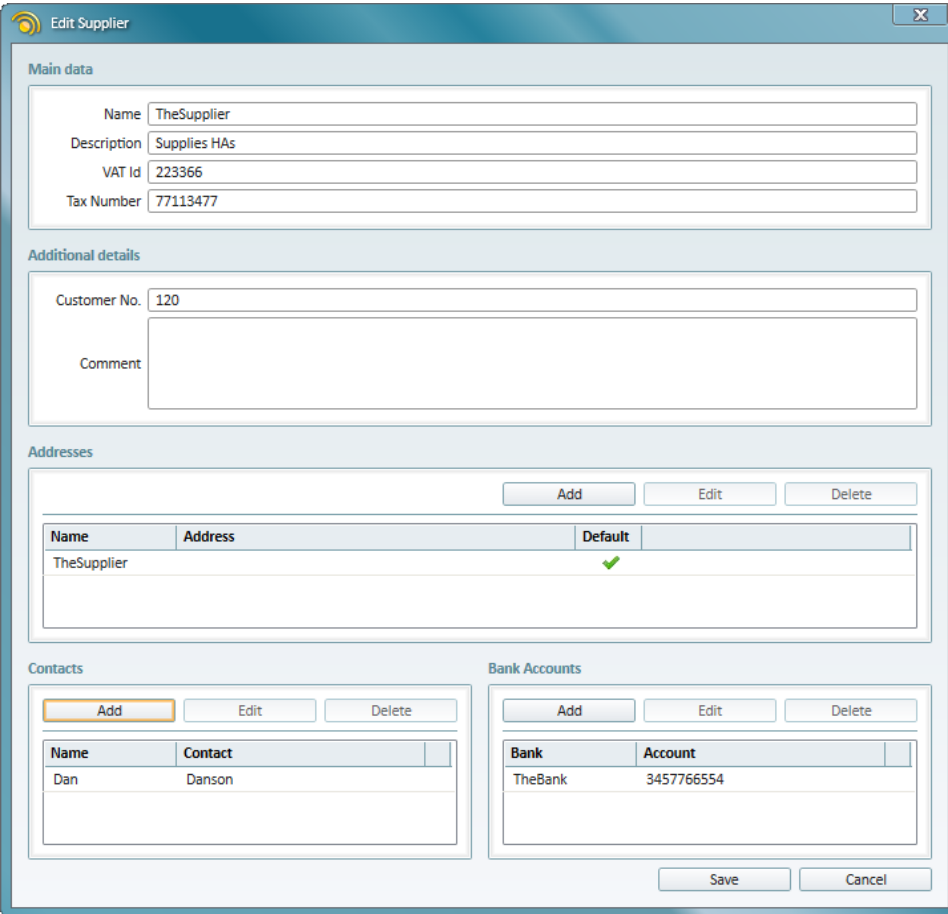
To start using the **Strato Stock Module**, you need to create:

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**.



The screenshot shows the 'Edit Supplier' window with the following sections:

- Main data:** Name: TheSupplier, Description: Supplies HAs, VAT Id: 223366, Tax Number: 77113477.
- Additional details:** Customer No.: 120, Comment: (empty text area).
- Addresses:** A table with columns Name, Address, and Default. The entry 'TheSupplier' is listed with a green checkmark in the Default column. Buttons for Add, Edit, and Delete are present.
- Contacts:** A table with columns Name and Contact. The entry 'Dan' is listed with 'Danson' as the contact. Buttons for Add, Edit, and Delete are present.
- Bank Accounts:** A table with columns Bank and Account. The entry 'TheBank' is listed with '3457766554' as the account. Buttons for Add, Edit, and Delete are present.

At the bottom of the window are 'Save' and 'Cancel' buttons.

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

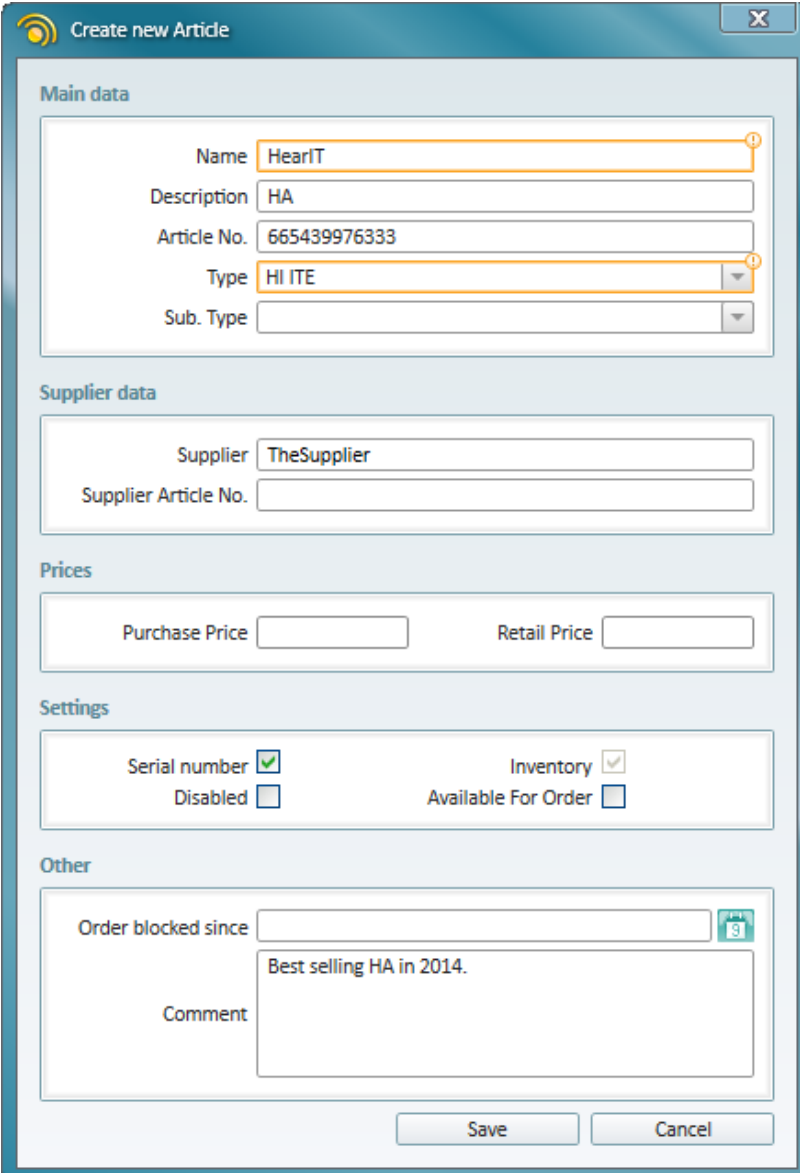
Suppliers

Name	Description	
John Loe		
TheSupplier	Supplies HAs	 

## 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.



**Create new Article**

**Main data**

Name: HearIT

Description: HA

Article No.: 665439976333

Type: HI ITE

Sub. Type:

**Supplier data**

Supplier: TheSupplier

Supplier Article No.:


**Prices**

Purchase Price:      Retail Price:

**Settings**

Serial number       Inventory   
Disabled       Available For Order

**Other**

Order blocked since:      

Comment: Best selling HA in 2014.

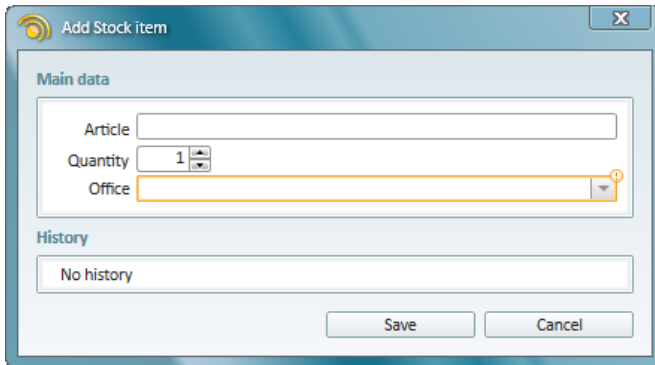
Save      Cancel

5. Click **Save** when finished. Your article has been added.

### 3.3 Adding Stock Items

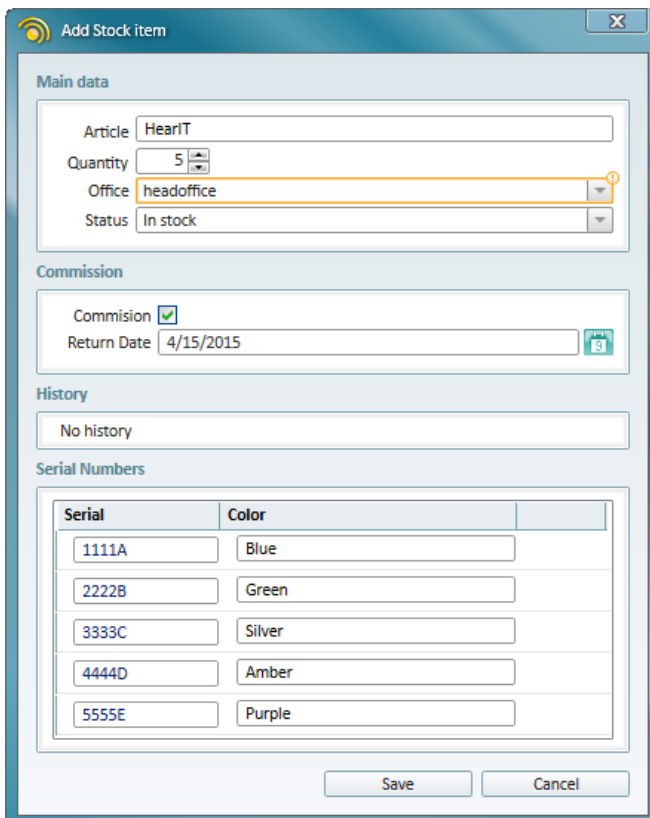
To add a new item to the stock:

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



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

Filter

6 stock item(s) found:

<input type="checkbox"/>	Article ty...	Client	Col...	Quantity	Commissi...	Commission return date	Office	Serial numbe
<input type="checkbox"/>	Other			17	<input type="checkbox"/>		Anna	
<input type="checkbox"/>	HI ITE		Blue	1	<input checked="" type="checkbox"/>	4/15/2015	headoffice	1111A
<input type="checkbox"/>	HI ITE		Green	1	<input checked="" type="checkbox"/>	4/15/2015	headoffice	2222B
<input type="checkbox"/>	HI ITE		Silver	1	<input checked="" type="checkbox"/>	4/15/2015	headoffice	3333C
<input type="checkbox"/>	HI ITE		Amber	1	<input checked="" type="checkbox"/>	4/15/2015	headoffice	4444D
<input type="checkbox"/>	HI ITE		Purple	1	<input checked="" type="checkbox"/>	4/15/2015	headoffice	5555E

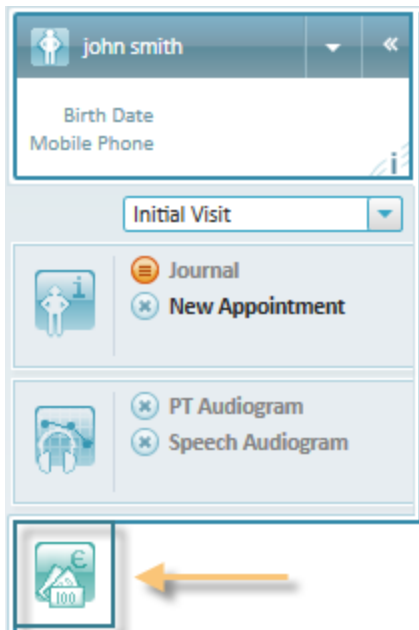


## 4 Managing Sale Items

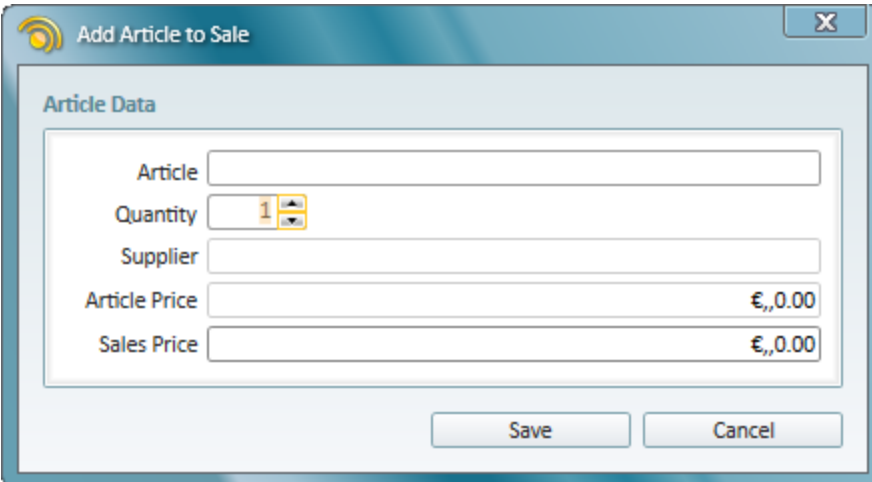
### 4.1 Delivering and Lending Hearing Aids

*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.

**Add Article to Sale**

**Article Data**

Article: HearIT  
 Quantity: 1  
 Supplier: TheSupplier  
 Ear Side: Left  
 Article Price: €,,0.00  
 Sales Price: €,,0.00

**Properties Left**

Colour: purple  
 Comment: 2 items of this colour left.

Save Cancel

- 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.

Current Sale

Start new sale Selected sale: New Sale 2/5/2015

Deliver Lend Return

<input type="checkbox"/>	Last Changed	Status	Article	Quantity	Price
<input checked="" type="checkbox"/>	2/5/2015 10:04 PM	New	HearIT Side: Right Colour: purple	1	
<input type="checkbox"/>	2/5/2015 9:57 PM	New	HearIT Side: Left Colour:	1	

Total Price: €0.11

- 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.

**Sale Delivery**

**Delivery**

Client: john smith Office: headoffice Delivery date: 2/5/2015

**Delivery Items**

Article	Quantity	Available	Serial	Warranty Exp. Date	Comment
HearIT Side: Right Colour: Green	1	1	2222B	2/5/2017	

Save Cancel

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

Current Sale

Start new sale Selected sale: New Sale 2/5/2015

<input type="checkbox"/>	Last Changed	Status	Article
<input type="checkbox"/>	2/5/2015 11:01 PM	Delivered	HearIT Side: Right Colour: Green Serial Number: 2222B

[Click to add new](#)

- 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.

Lend items

Lend

Client john smith Office: headoffice Lend date 2/5/2015

Lend Items

Article	Quantity	Available	Serial	Warranty Exp. Date	Comment
HearIT Side: Left Colour:	1	N/A	23312	2/5/2017	

Save Cancel

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

Current Sale

Start new sale Selected sale: New Sale 2/5/2015

<input type="checkbox"/>	Last Changed	Status	Article
<input type="checkbox"/>	2/5/2015 11:12 PM	Lent	HearIT Side: Left Colour: Blue Serial Number: 1111A

[Click to add new](#)

## 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:

 Disabled, Inventory:  Available For Order. The 'Other' section shows Order blocked since: (empty), Comment: (empty). Buttons for Save and Cancel are at the bottom." data-bbox="129 199 531 614"/>

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:

Current Sale

Start new sale Selected sale: New Sale 2/5/2015 Deliver Lend Return

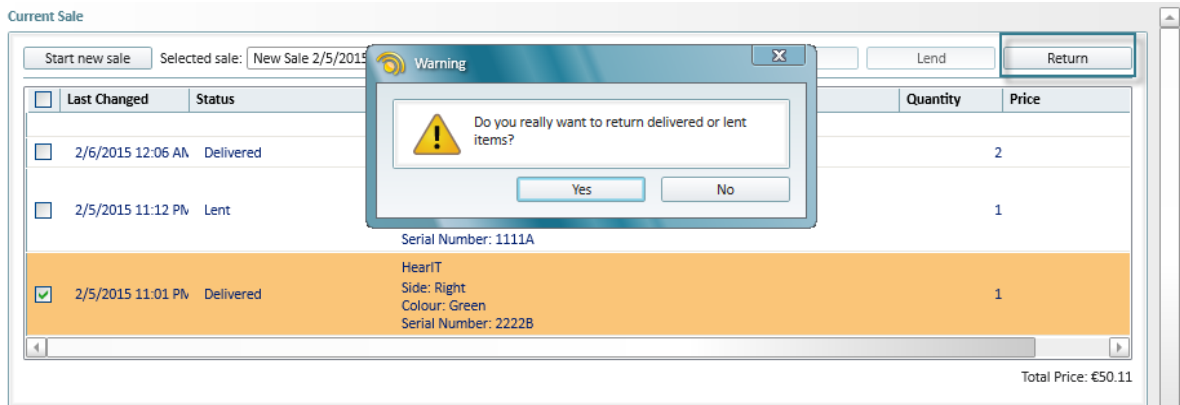
<input type="checkbox"/>	Last Changed	Status	Article	Quantity	Price
<input type="checkbox"/>			<a href="#">Click to add new</a>		
<input type="checkbox"/>	2/6/2015 12:06 AM	Delivered	Battery twin-pack	2	
<input type="checkbox"/>	2/5/2015 11:12 PM	Lent	HearIT Side: Left Colour: Blue Serial Number: 1111A	1	
<input type="checkbox"/>	2/5/2015 11:01 PM	Delivered	HearIT Side: Right Colour: Green Serial Number: 2222B	1	

Total Price: €50.11

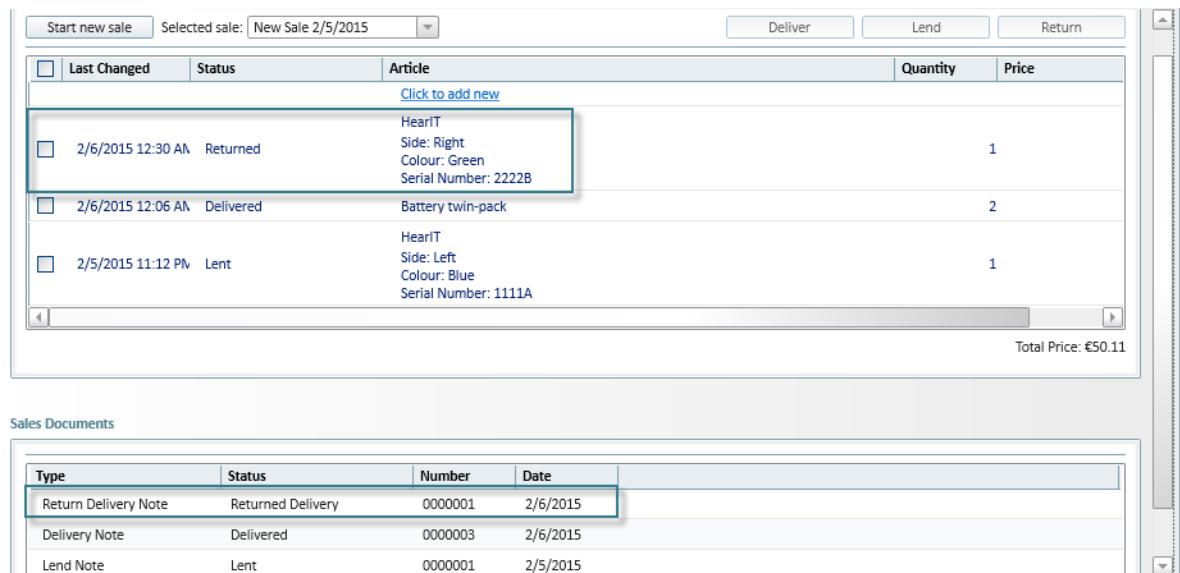
### 4.3 Returning Hearing Aids to Stock

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:

Stock item EXPLORE

Search Open template ...

Filter

7 stock item(s) found:

<input type="checkbox"/>	Article ty...	Client	Color	Commissi...	Commission return date	Office	Serial number	Status
<input type="checkbox"/>	HI ITE	Nick Camer...	Blue	<input type="checkbox"/>		Main Clinic	1111A	Delivered
<input type="checkbox"/>	HI ITE		Amber	<input type="checkbox"/>		Main Clinic	4444D	In stock
<input type="checkbox"/>	HI ITE	Nick Camer...	Silver	<input type="checkbox"/>		Main Clinic	3333C	Lent
<input type="checkbox"/>	HI ITE		Green	<input type="checkbox"/>		Main Clinic	2222B	In stock
<input type="checkbox"/>	HI ITE		Purple	<input type="checkbox"/>		Main Clinic	5555C	In stock
<input type="checkbox"/>	HI ITE		Matte Black	<input checked="" type="checkbox"/>	27-03-2015	DowntownClinic	7777F	In stock
<input type="checkbox"/>	HI ITE		Black	<input checked="" type="checkbox"/>	27-03-2015	DowntownClinic	6666D	In stock

The stock after returning of an item:

Stock item EXPLORE

Search Open template ...

Filter

7 stock item(s) found:

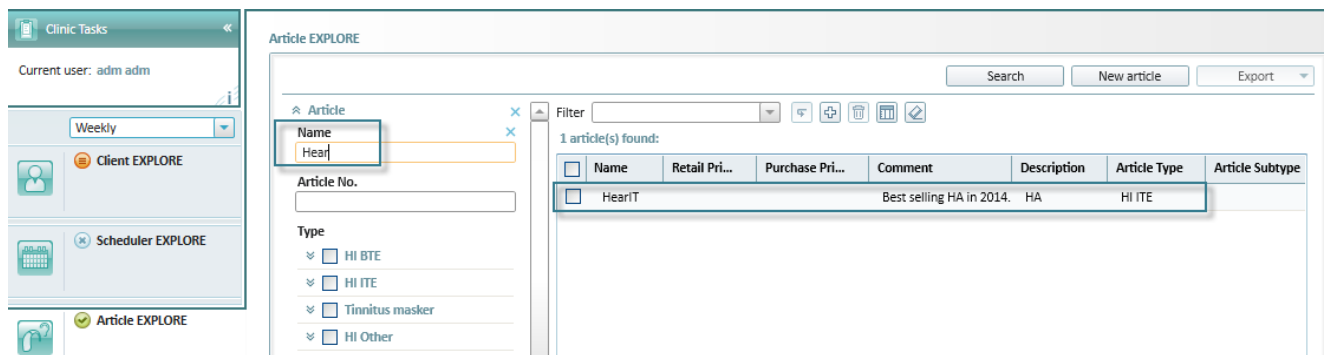
<input type="checkbox"/>	Article ty...	Client	Color	Commissi...	Commission return date	Office	Serial number	Status
<input type="checkbox"/>	HI ITE		Blue	<input type="checkbox"/>		Main Clinic	1111A	In stock
<input type="checkbox"/>	HI ITE		Amber	<input type="checkbox"/>		Main Clinic	4444D	In stock
<input type="checkbox"/>	HI ITE	Nick Camer...	Silver	<input type="checkbox"/>		Main Clinic	3333C	Lent
<input type="checkbox"/>	HI ITE		Green	<input type="checkbox"/>		Main Clinic	2222B	In stock
<input type="checkbox"/>	HI ITE		Purple	<input type="checkbox"/>		Main Clinic	5555C	In stock
<input type="checkbox"/>	HI ITE		Matte Bla...	<input checked="" type="checkbox"/>	27-03-2015	DowntownCli...	7777F	In stock
<input type="checkbox"/>	HI ITE		Black	<input checked="" type="checkbox"/>	27-03-2015	DowntownCli...	6666D	In stock

## 5 Exploring Stock Items

### 5.1 Exploring Articles

To explore articles:

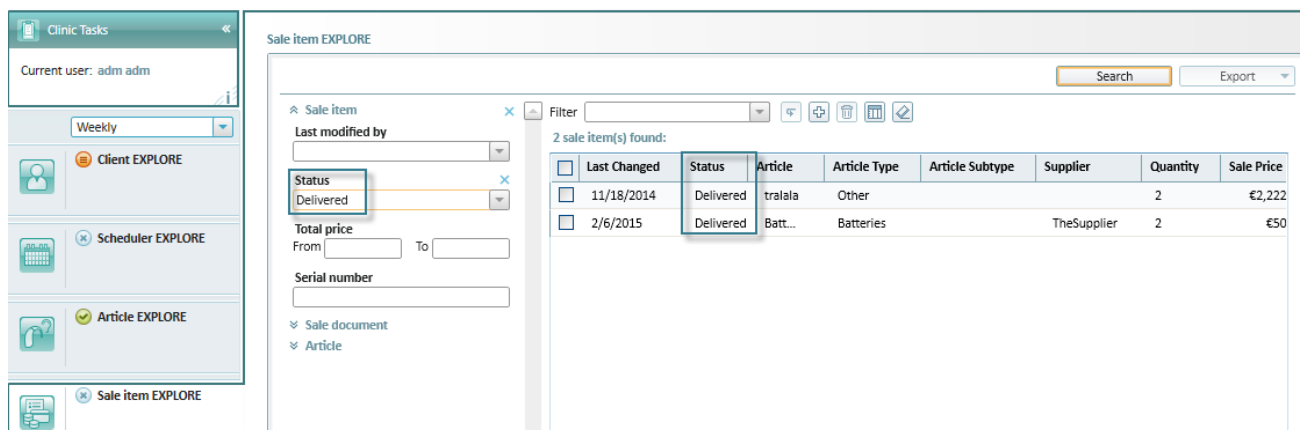
1. Navigate to **Clinic Tasks > Article EXPLORE**.
2. Enter a relevant search criteria (if applicable) and press the **Search** button. The article(s) with your search criteria will be shown.



### 5.2 Exploring Sale Items

To explore sale items:

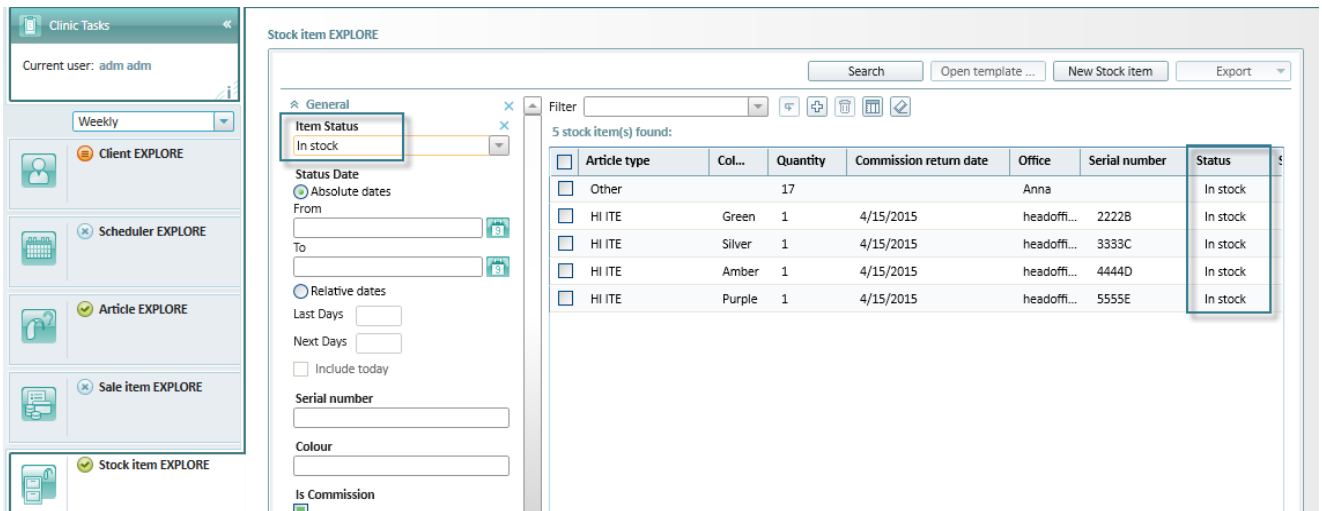
1. Navigate to **Clinic Tasks > Sale item EXPLORE**.
2. Enter a relevant search criteria (if applicable) and then press the **Search** button. The sales items matching your search criteria will be shown.



### 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.

