

What's New

Strato Version 2.1



Strato

auditdata 
Your Partner in Audiology Solutions

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1 Introduction

The purpose of this document is to give you an overview of the new and modified features in Strato 2.1.

The available languages are English, Danish, Swedish, Norwegian, Spanish, and Polish. Strato v.2.1 is certified to NOAH 4 and works with Noah v.4.6.

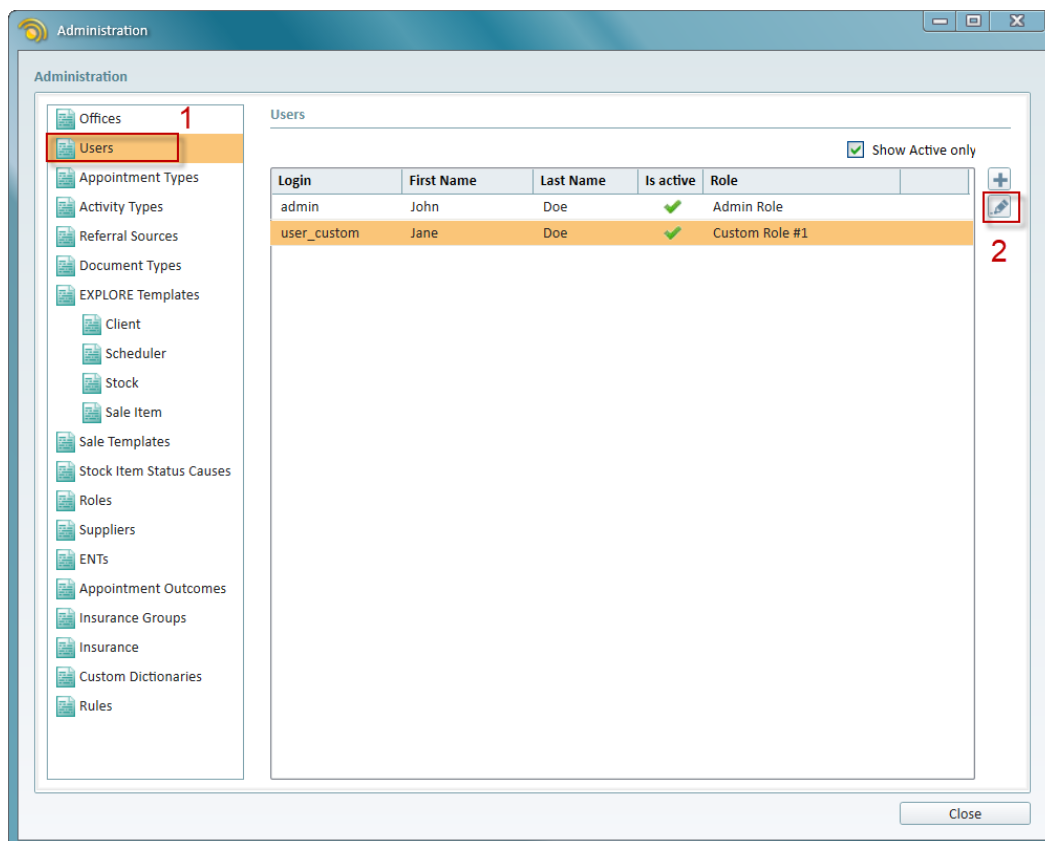
2 Advanced Resource Handling

2.1 Configuring User Working Hours

Advanced Resource Handling is a fast and easy way to manage working hours of Strato users across multiple offices. You can either specify user working hours as admin for all the users in the application or only for yourself as a logged-in user.

To set up working hours as admin:

1. Go to **Tools > Administration > Users** and start editing the user profile.



2. An **Edit User Data** window opens where you select the offices that you need and then click **Working hours**.

Edit User Data

Account Data

Login: user_custom

Password:

Confirm Password:

Role: Custom Role #1

Strato on client computers has to be restarted in order to apply changes to user roles.

User Status: Active

Personal Data

User Initials: USA

First Name: Jane

Last Name: Doe

Mobile Phone:

Phone:

Email:

Sign:

User ID:

Notes:

Assigned Offices

- ☒ Aarhus Office
- ☒ Copenhagen Office
- ☒ Malmo Office

Working hours

Save Cancel

- Specify working hours for one or several offices. For a single workday, only one office must be selected.

Edit User Working Hours

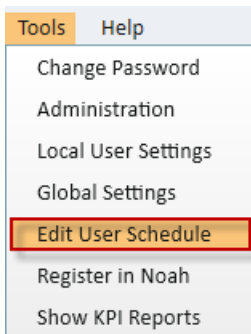
WorkingHours

Day Of Week	From	To	Day Off	Office
Sunday	0:00	0:00	<input checked="" type="checkbox"/>	Aarhus Off
Monday	10:00	13:00	<input type="checkbox"/>	Aarhus Off
Tuesday	9:00	14:00	<input type="checkbox"/>	Malmo Off
Wednesday	14:00	18:00	<input type="checkbox"/>	Copenhagen
Thursday	10:00	13:00	<input type="checkbox"/>	Aarhus Off
Friday	9:00	14:00	<input type="checkbox"/>	Malmo Off
Saturday	0:00	0:00	<input checked="" type="checkbox"/>	Aarhus Off

Save Cancel

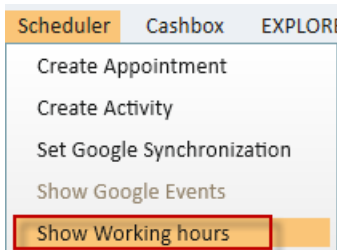
4. Click **Save** to finish the set up.

To add working hours as a logged-in user, select **Edit User Schedule** from the **Tools** menu.

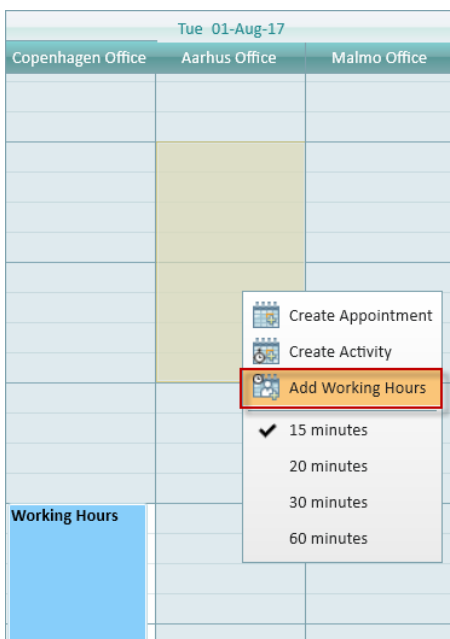


2.2 Working Hours in Scheduler

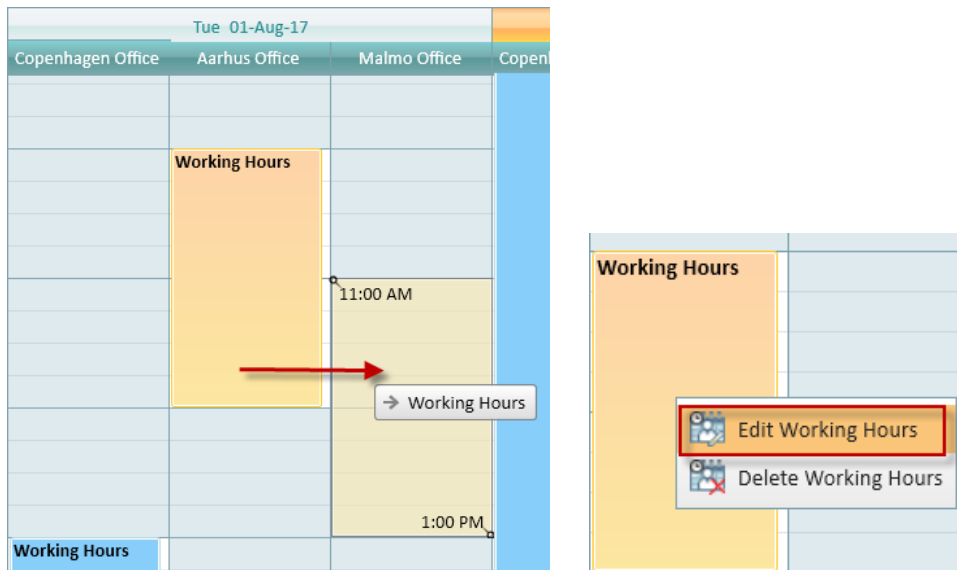
Working hours are only visible in the Strato Scheduler if enabled by selecting **Show Working hours** from the **Scheduler** menu.



Every day in Scheduler now includes time slots for all existing offices. You can easily create working hours for the selected office by right-clicking and selecting **Add Working Hours**.



To edit working hours, drag and drop the block to another day, time, and office OR right-click and select **Edit Working hours**.



Note: Changes that you make to the working hours in the Calendar do not apply to the weekly user schedule.

To avoid scheduling conflicts, working hours cannot intersect. For example, if you try creating working hours for two different offices at the time that fully or partially overlaps, an error will be displayed.

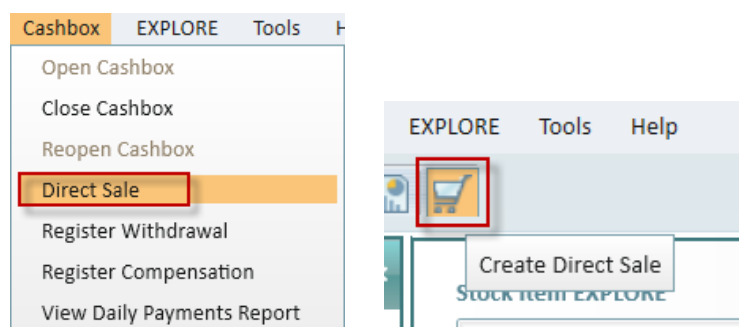
For more information on working hours in Strato, please refer to the **Advanced Resource Handling Guide**.

3 Sale Enhancements

3.1 Direct Sale

Strato now features a **Direct Sale** option which allows selling items without serial numbers to the unregistered customers. This is a fast and easy way to sell less expensive items, such as batteries or accessories. You can use it to sell only inventory items with no serial number.

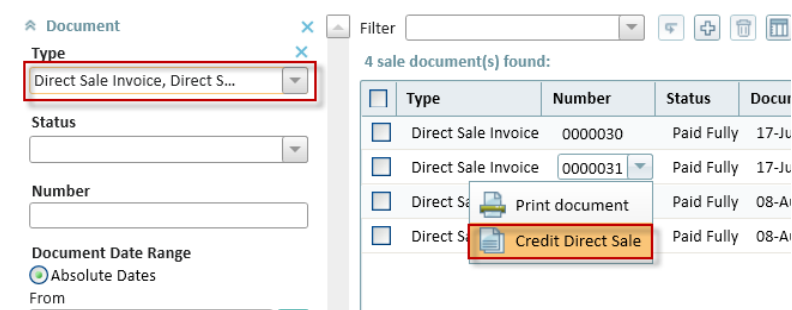
Select **Direct Sale** from the **Cashbox** menu OR click the **Create Direct Sale** icon to start the sale.



Now add one or several articles, specify customer's preferred payment method, and click **Save**.

The image shows the 'Direct Sale' window. At the top, there's a header with 'Office' set to 'Copenhagen Office' and a date '08-Aug-17'. Below this is a table titled 'Direct Sale Items' with columns: Article, Quantity, Available Qua..., Discount, and Sales Price. The table contains one row: 'Hearing Instrument Battery' with quantity 2 and sales price €30.00. Below the table, there's a checkbox for 'Print Invoice on Save' and a 'Total Amount' field showing €30.00. The 'Payment Method' is set to 'Cash'. The 'Save' button is highlighted with a red box.

Strato will update the stock and create a **Direct Sale Invoice** document that you can view and print from the Sale Document EXPLORE. Select **Credit Direct Sale** if refund is needed.



Use the **Payment type** filter in Payment EXPLORE to view and print **Direct Sale** payments and returns.

☒ (Select All)
☐ By invoice
☐ Cash difference
☐ Cancellation
☐ By credit
☐ Withdrawal
☐ Compensation
☐ Deposit
☐ Return deposit
☒ Direct Sale
☒ Direct Sale Return

Direct Sale, Direct Sale Return

6 payment(s) found:

<input type="checkbox"/>	Payment Num...	Registration Da...	Payment Date	Amount	Office	User	Payment Type
<input type="checkbox"/>	69	10-Aug-17	10-Aug-17	(€15.00)	Copenhagen Office	John D...	Direct Sale Return
<input type="checkbox"/>	56	08-Aug-17	08-Aug-17	€30.00	Copenhagen Office	John D...	Direct Sale

After making a direct sale, the item's status changes to *Delivered* and no **Delivery Note** is created.

3.2 Discount

With the new discount feature, you can apply your custom discounts when one or several articles are added to the sale. To assign your discount, go to **Tools > Administration** and click the **Rules** tab. When creating the new rule, add one or several articles to it.

Administration

Rules

Sale Item - new article selected

☒ Show Active only

Name	Description	Active
Hearing Aid Related	Related products for the Hearing Aid	✓
Premium Hearing Aids	Related articles for premium Hearing Aid products	✓

Create New

Sale Item - new article selected

Name: Discount

Description: New discount for hearing instruments

Condition: Is specific Article

When one of the following articles is selected:

- Add Article
- Embrace Hearing Stella BTE (546758573)
- America Hears BTE (546758570)

Action: Discount

Is Active: ☒

Save Cancel

Close

Select the **Discount** option from the **Action** drop down list and enter the amount of discount below. Click **Save** to complete the procedure.

Create New

Sale Item - new article selected

Name: Discount

Description: New discount for hearing instruments

Condition: Is specific Article

When one of the following articles is selected:

- Add Article
- Embrace Hearing Stella BTE (546758573)
- America Hears BTE (546758570)

Action: Discount

Discount to apply: €15.00

Is Active: ☒

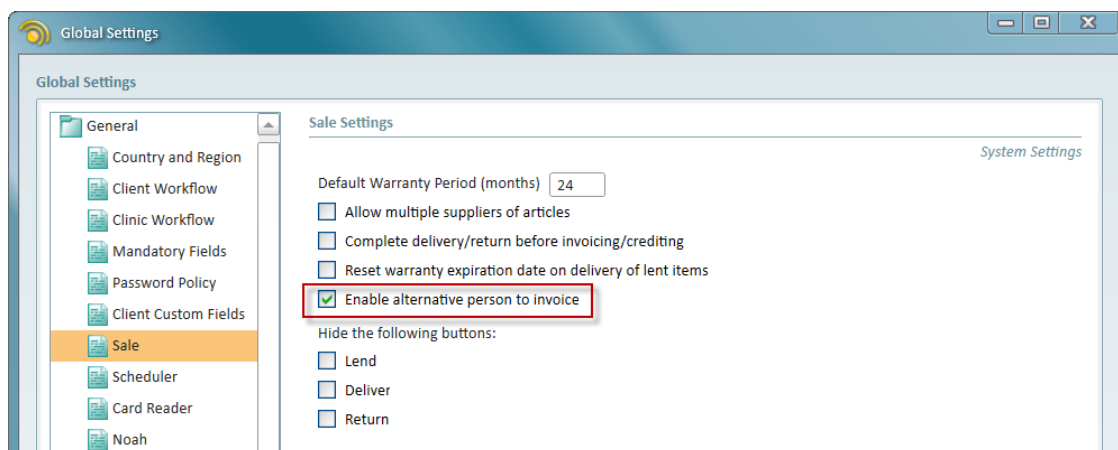
Save Cancel

Your custom discount will be applied if you add the selected articles to the sale.

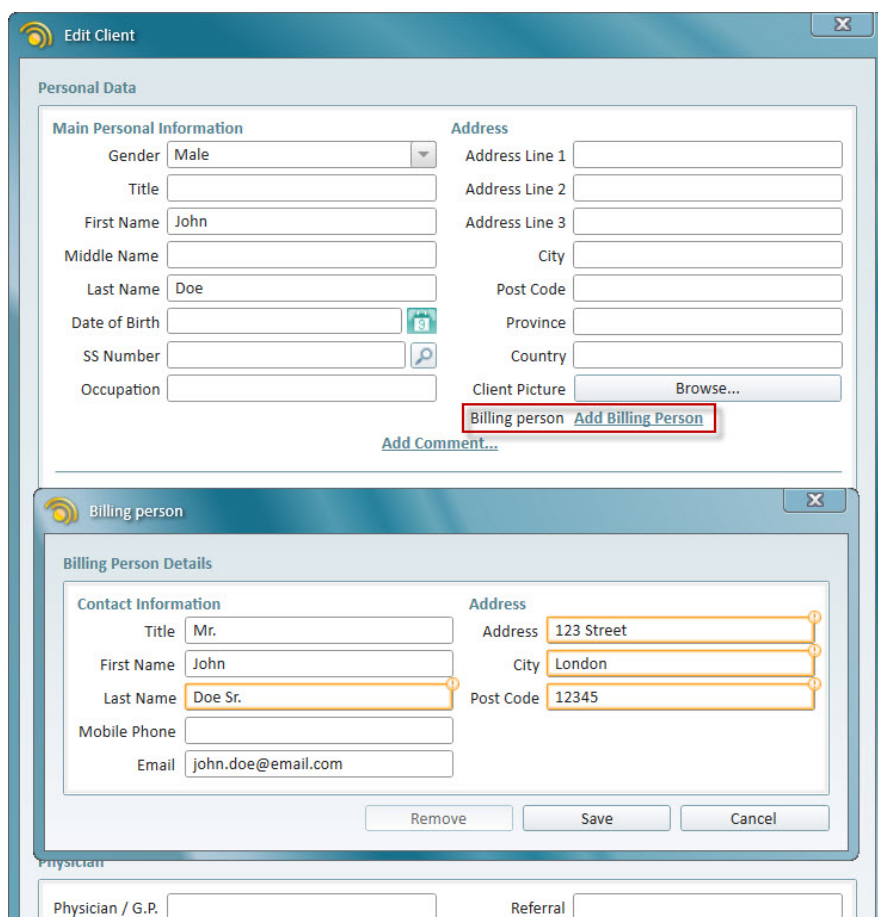
Quote Lend Invoice Invoice Register Payment Deliver Lend Return								
<input type="checkbox"/>	Last Changed	Status	Article	Quantity	Private Price	Reimbursement	Sales Price	VAT
			Click to Add New					
<input type="checkbox"/>	08-Aug-17 18:41	New	Embrace Hearing... Side: Left Colour:	1	€934.00	€0.00	€934.00	25%
<input type="checkbox"/>	08-Aug-17 18:41	New	America Hears BT... Side: Left Colour:	1	€1,984.00	€0.00	€1,984.00	25%
					Private Price: €2,918.00	Reimbursement: €0.00	Sales Price: €2,918.00	
							Discount: €30.00	

3.3 Alternate Billing Person

In cases when the client is under-age or cannot, for some reason, be a billing person, Strato now allows you to add the alternative person to invoice. You can enable this option under **Tools > Global Settings > Sale**.



When editing the client, click **Add Billing Person** and then fill in the billing person details. Save your changes.



Clicking **Remove** deletes the billing person for the customer. You can add one alternative billing person per client.

After you make the sale, the alternative billing person will be included in the payment documents, e.g. invoice, credit note.

3.4 Overpayment

Overpayment is now possible when registering payments in Strato. If you enter the amount that exceeds the original invoice price, the overpayment is displayed as the outstanding payment for the sale at hand.

The 'Register Payment' dialog box contains the following fields and values:

- Client: John Doe
- Invoice: 0000044
- Debitor: John Doe
- Invoice Amount: €499.00
- Paid: €0.00
- Outstanding: €499.00
- Payment Date: 08-Aug-17
- Payment Amount: €500.00
- Method: Card
- Office: Copenhagen Office
- Description: Payment by Invoice #0000044
- ☐ Print receipt on save

The **Client Invoice** status is set to *Paid Fully*.

Sales Documents					
Type	Status	Number	Date	Amount	Outstanding Payment
Client Invoice	Paid Fully	0000044	08-Aug-17	€499.00	(€1.00)

3.5 Deposit Improvements

It is now possible to apply the deposit even if its amount exceeds the invoice amount. You can use the rest of the deposit funds for the client's next purchase. The remaining deposit is displayed in the *Payment balance* section.

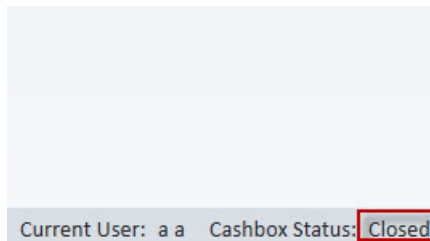
The 'Payment balance' section displays the following information:

- Deposit: €275.00
- From client: (€4,691.00)
- From insurance: €0.00
- To client: €6,233.00
- To insurance: €0.00

4 Cashbox

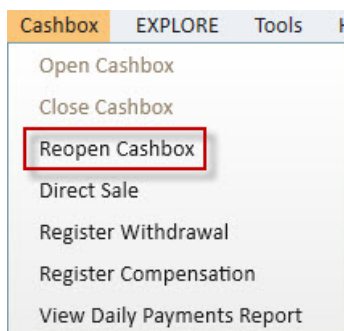
4.1 Cashbox Status

You can easily see the cashbox status for the selected office. The status is now displayed in the lower-right corner of Strato.



4.2 Reopening Cashbox

Reopen the cashbox if you closed it on the same day by selecting the **Reopen Cashbox** option from the **Cashbox** menu.

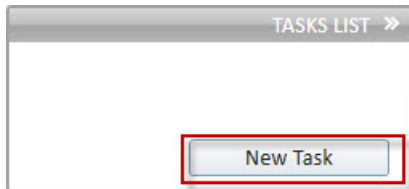


5 Other Improvements

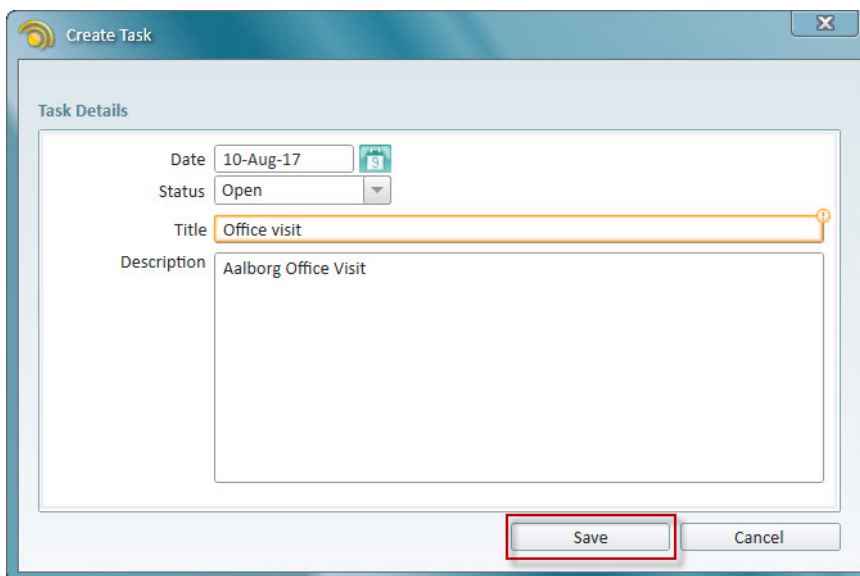
5.1 Adding Tasks

Strato now includes to-do items that will help you track your current activities and never forget important tasks. To create a task:

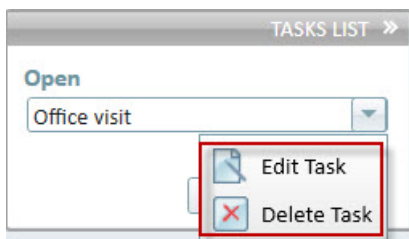
1. Locate the **TASKS LIST** box below the **Search** tool and click **New Task**.



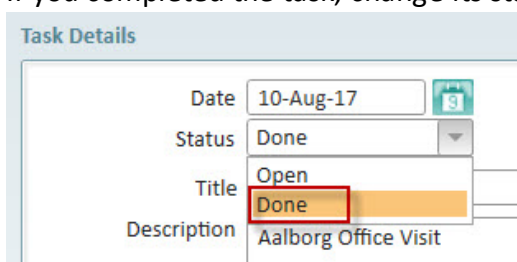
2. Enter the task details and save it.



3. The task will be added to the box with the status *Open*. From here, you can edit or delete it.



4. If you completed the task, change its status to *Done*.

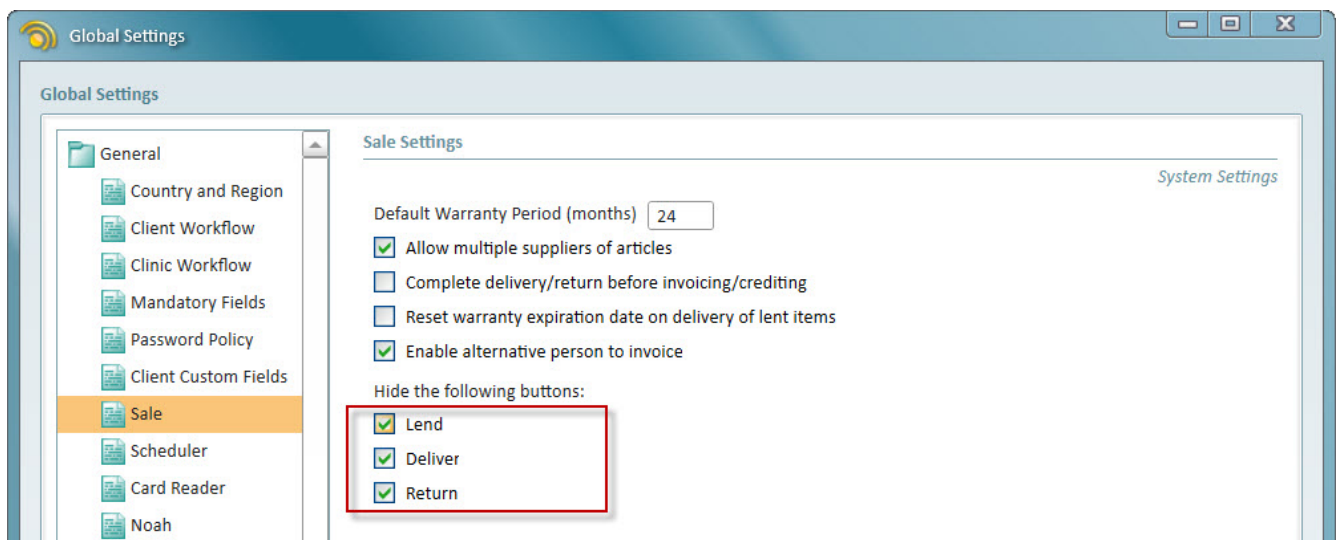


5.2 EXPLORE Views

- **Paid, Payment Terms, and Payment Terms Description** are now visible fields in the **Sale Document EXPLORE** view. Fields related to payment terms are only present if enabled in settings.
- **Activity Type** is now a visible field in the **Scheduler EXPLORE**. You can also use it as a search parameter.
- **Sale Item EXPLORE** includes the **Apply Date Range for Document type** filter. You can use it to search for specific documents within the defined date range.
- Article status in the **Stock Item Explore** view can be set to *Blocked*. Blocked article is in stock but is not available for sale.

5.3 Sale Tab

You can hide the **Lend, Deliver, and Return** buttons from the client's **Sale** tab under **Tools > Global Settings > Sale**.



6 Additional Information

For further information, please contact stratosales@auditdata.com or visit www.auditdata.com.