

Strato Invoicing Module

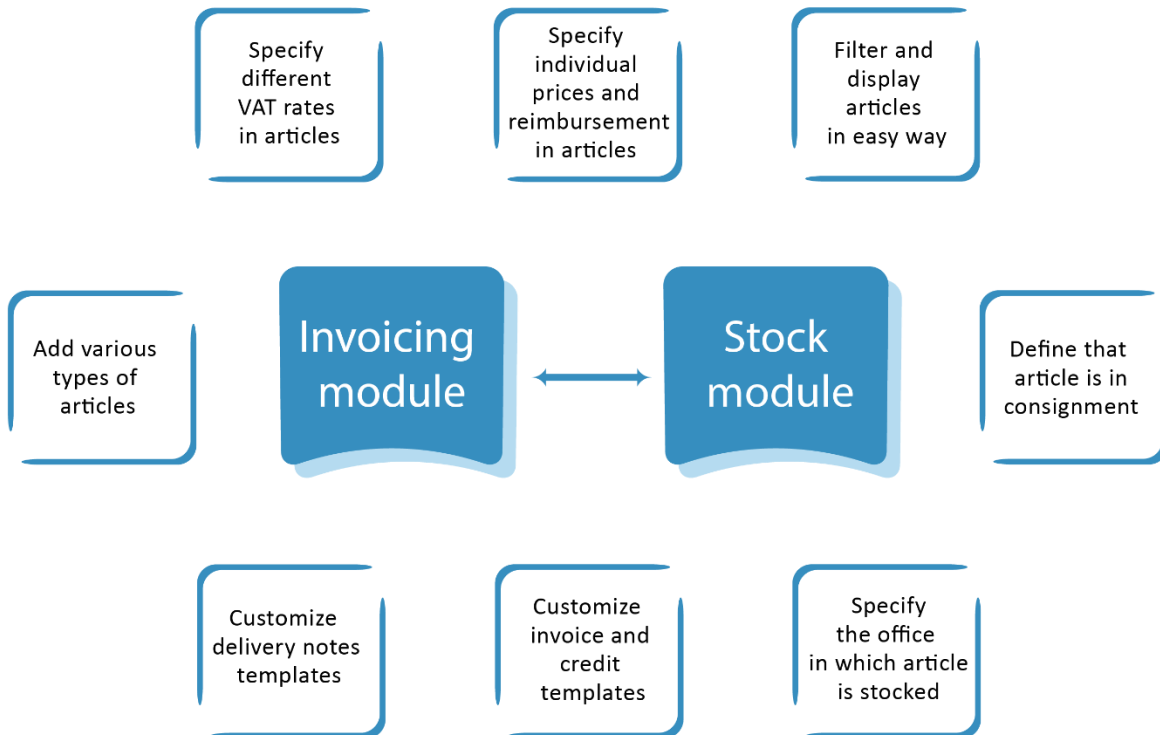
Getting Started



1 Invoicing Module Overview

The Invoicing module is a powerful add-on to Strato enabling you to create various invoices and customise invoice templates to your preferences.

Please note that the Invoicing module can only be used together with the Stock module. The image below demonstrates what you can do with the Stock and Invoicing modules:



2 Configuring Invoices

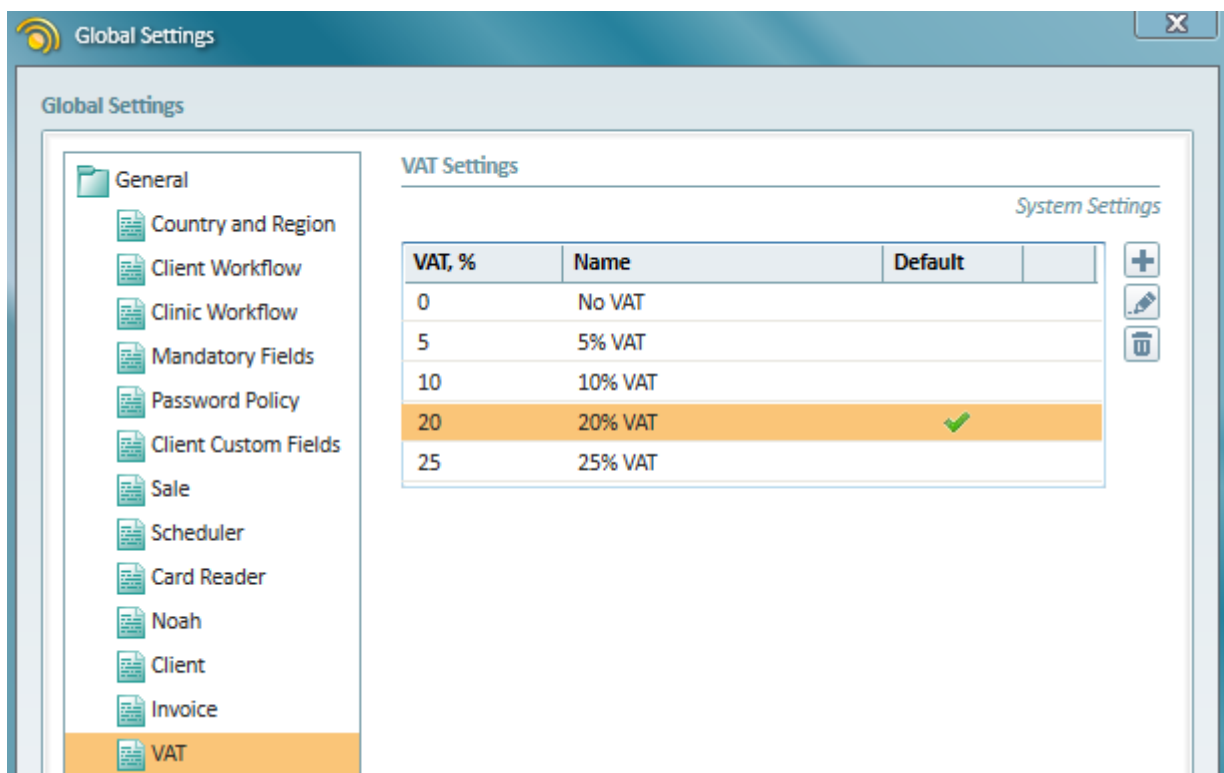
Strato has a set of predefined invoicing values and templates, but you may customize them or add your own templates.

Note: You only have to do this configuration once – or when you want to change any invoicing parameters or templates.

2.1 Setting VAT Rates

Depending on your market location and customers, you might require to set different VAT rates for different articles.

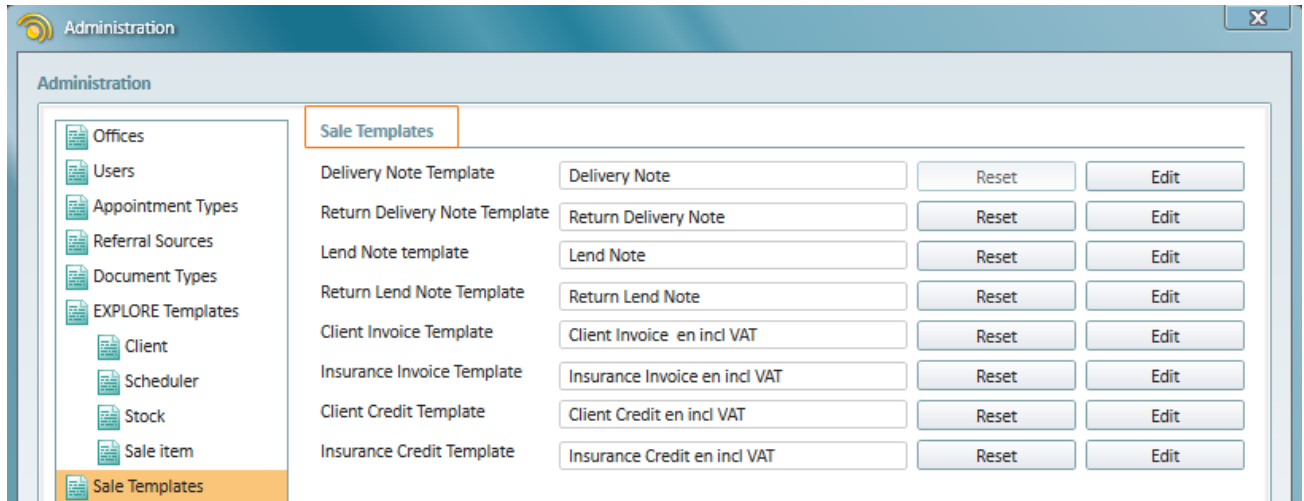
To set the VAT rates, navigate to **Tools > Global Settings > VAT** and add the VAT rates you need.



The rate, marked as “Default” will be used as a default value when creating new articles, but you can change the VAT rate when creating a sale (if the specific article has another VAT rate – or if can be sold to a specific client segment with another VAT rate).

2.2 Customising Invoice Templates

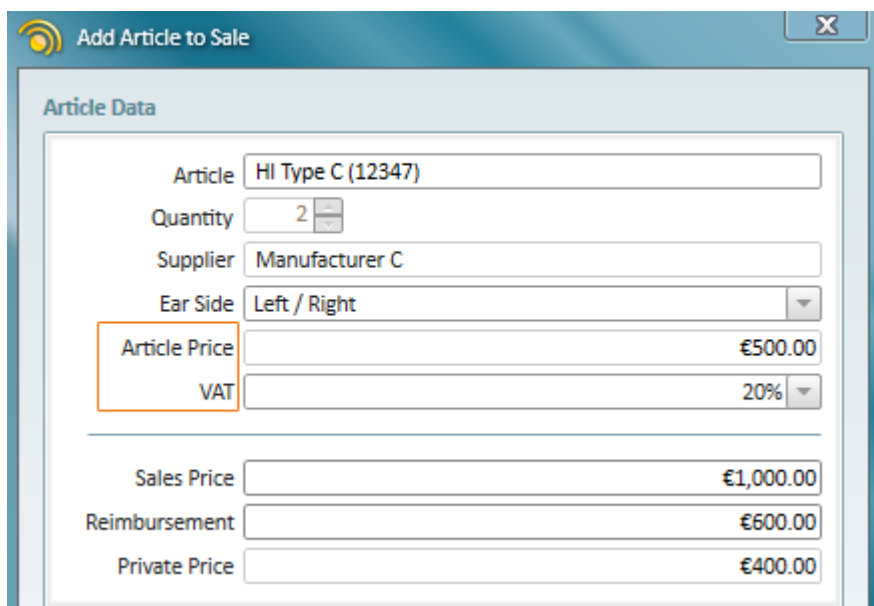
Strato has a pre-installed number of invoice templates that are available at **Tools > Administration > Sale Templates**.



You can customize the templates according to your preferences (i.e. insert your own logo or edit the default fields). **Important:** The templates must use the same VAT rates as defined in **Global Settings > VAT**.

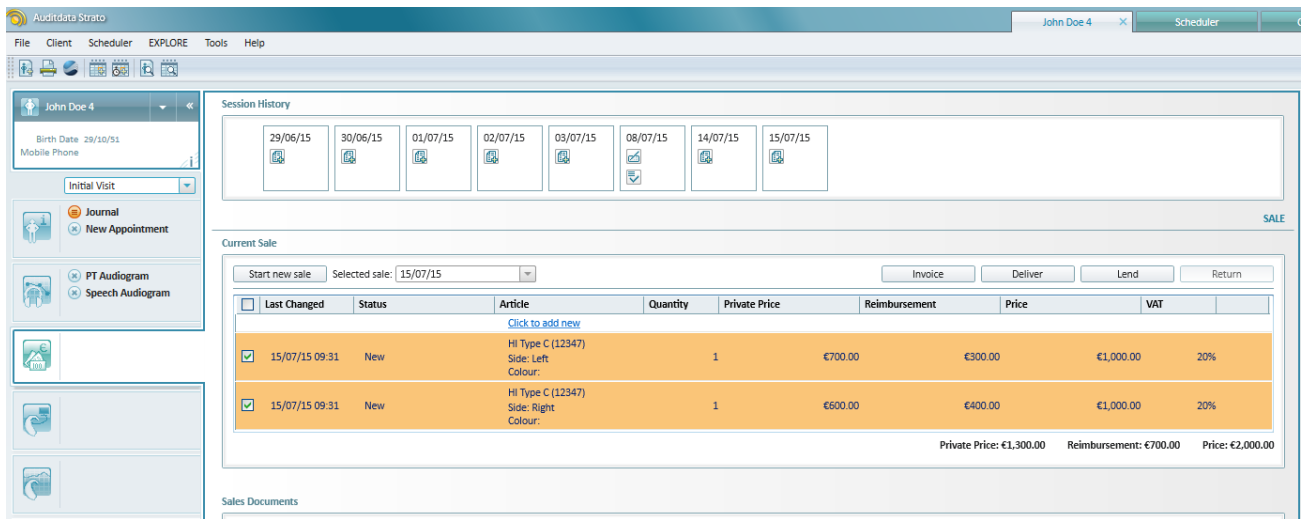
3 Using Strato for Invoicing

When creating a sale for an individual client, you are able to change the VAT rate (or even the price) if it is applicable to a specific sale.

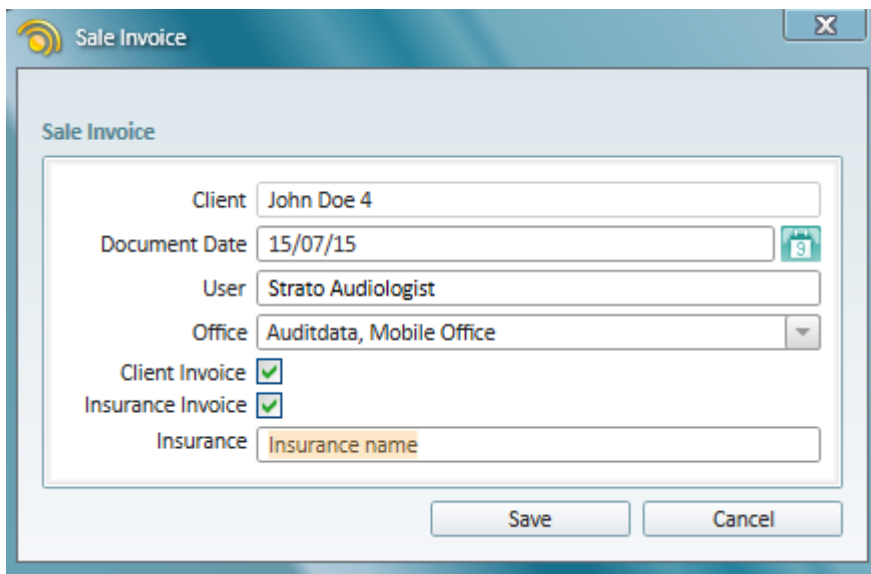


When the sale is created, you can specify whether the articles should be lent or delivered.

You can also invoice the articles. Select the articles to invoice, and Strato will show the price for these articles (including any reimbursement).



Click the **Invoice** button to generate an invoice for the client (and any reimbursement if applicable).



After you click the **Save** button, the invoice will appear in the list of the **Sales Documents**.

Sales Documents

Type	Status	Number	Date
Client Invoice	Client Invoiced	0000019	15/07/15
Insurance Invoice	Insurance Invoiced	0000020	15/07/15

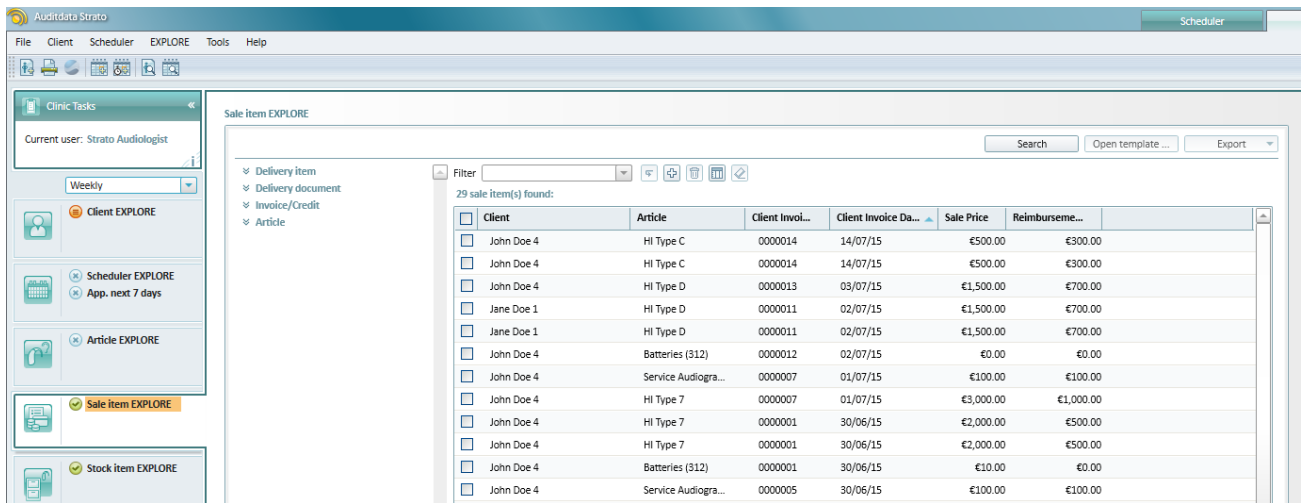
Select the document(s) and print.



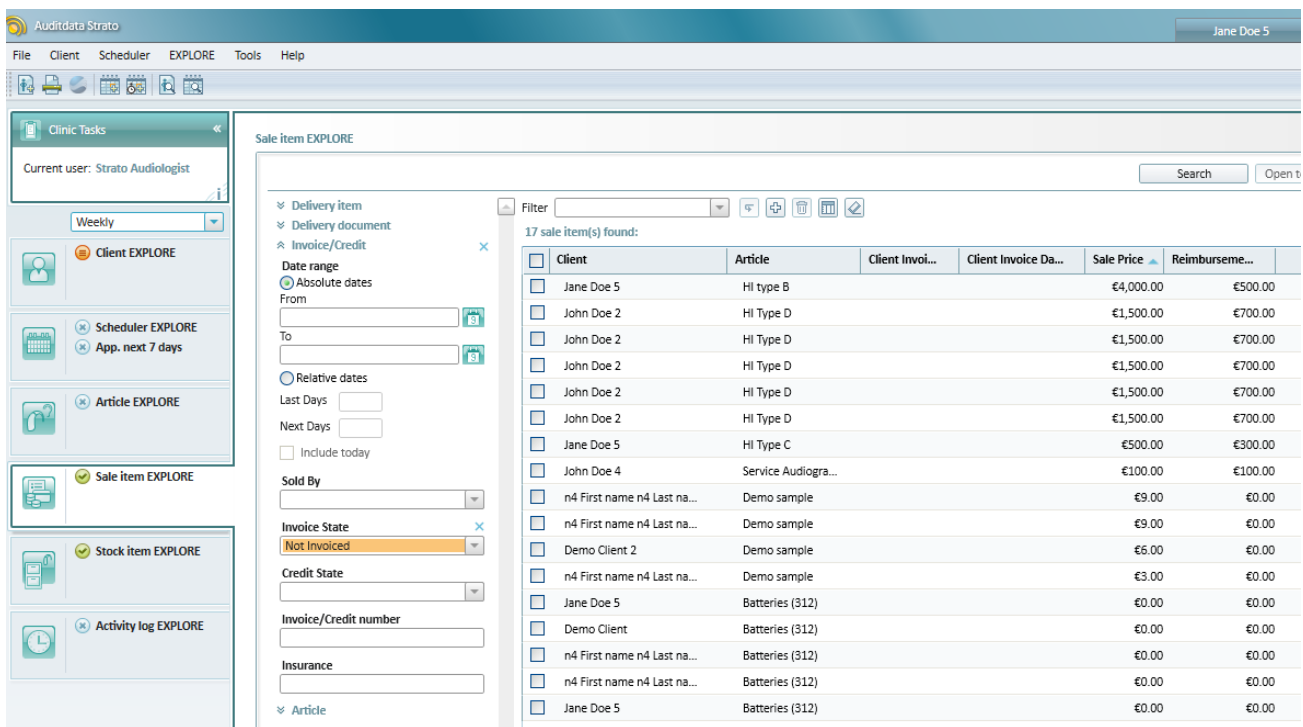
Below is the example of a simple Client invoice.

John Doe 4	Auditdata, Mobile Office			
	Phone: E-mail:			
Client Invoice				
Invoice number: 0000019	SSN: 1000000004			
Date: 15/07/15	Invoiced by: Strato Audiologist			
<hr/>				
Article	Type	Serial number	Quantity	Total price
HI Type C	HI BTE		1	1000.00
HI Type C	HI BTE		1	1000.00
				2000.00
		Reimbursement:	700.00	
		Amount to pay (including VAT):	1300.00	
<hr/>				
		Taxable amount 20% VAT:	1083.33	
		20% VAT paid:	216.67	
<hr/>				
		Taxable amount 5% VAT:	0.00	
		5% VAT paid:	0.00	
<hr/>				
		Non-taxable amount:	0.00	

In the **Sale Item EXPLORE**, you can see a list of all sales articles.



In the filters, you can select **Not Invoiced/Invoiced** to display all the sales articles which were not yet invoiced or invoiced correspondingly.



If applicable, you can also credit the client (or reimbursement); and Strato will create the Credit notes for both the client and any reimbursement.