



Strato



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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 1.7.0.0.

The available languages are English, Danish, and Swedish. This version of Strato is certified to NOAH 4 and works with Noah v.4.4 or any later Noah versions.

2. System Wide Enhancements

2.1 Invoicing Module

A new Invoicing module has been added as an add-on to Strato.

With the Invoice module you can:

- > Create new invoices for both a client and any third-party payer directly in Strato.
- > Customize the predefined invoice templates to your preferences.
- > Easily find clients with articles which were not yet invoiced.
- > Identify clients who haven't been invoiced for a certain period of time.

The Invoicing module is an add-on module, which you can order separately in addition to your basic Strato license. The Invoicing module is intended to be used together with the Strato Stock module.

Please contact <u>stratosales@auditdata.com</u> to get the Invoicing module available in your Strato System.

For more information on the Invoicing module, refer to the Strato Invoicing Module document or view the videos demonstrating the stock and invoice functionalities.

2.2 Handling Strato in Offline Mode

For those users who occasionally need to work with Strato without an Internet connection, Strato has been upgraded to also work offline, enabling you to do the basic clinic tasks on the local PC. The Strato offline mode is an add-on, which you can order separately in addition to your Strato license.

There are two scenarios allowing you to operate Strato in the offline mode. In the first scenario you can make the client's data available for offline use before you go to an area with no Internet connection. This can be done either from the **Scheduler EXPLORE** page:

I Clinic Tasks «	Scheduler EXPLORE													St.
Current user: adm adm											Search	Open template	Export	
Weekly	S Grouping Type Seneric Activity data	 Filter More t 	than 1000 appointme		ere found; only the first 1	1000 are dis	played.						8	Export to CSV
Client EXPLORE	Appointment data		Client First Name	Client Last Na	Appointment Status	User	Appointment Type	Location	Start Time	End Time	Referral Source	Referral Subsour	P M	Export to XML
	Vient data Referral source data	-	123	Test12345	Booked	adm ad	First follow-up	testOffice123	4/6/2014 2:00 PM	4/6/2014 3:00 PM				Export to XML
Scheduler EXPLORE	Referral source data		123	Test12345	Confirmed	adm ad	First follow-up	testOffice123	4/10/2014 2:15 PM	4/10/2014 3:15 PM			- 🐴	Export clients to NHAX
Scheduler EXPLORE			123	Test12345	Booked	adm ad	First follow-up	testOffice123	4/7/2014 3:30 PM	4/7/2014 4:30 PM				
				123	Booked	adm ad	Follow up appointment	ລໍ ສະ ໜີລິວດິງັt	6/4/2014 1:30 PM	6/4/2014 2:00 PM			- 🔿	Prepare clients for offline
Article EXPLORE				LoadTest	Booked	adm ad	Follow up appointment	åægüäö6ÿt	6/4/2014 1:15 PM	6/4/2014 1:45 PM				
C'			FirstName7872	LastName7872	Booked	adm ad	Follow up appointment	aægüäößÿt	6/2/2014 10:30 AM	6/2/2014 11:00 AM			DF5A7664-	850 1
			FirstName7872	LastName7872	Booked	adm ad	Follow up appointment	ລ້ອຍສບິລິດອີງົາ:	6/2/2014 10:30 AM	6/2/2014 11:00 AM			F76768DD-	271 1
Sale item EXPLORE			FirstName1125	LastName1125	Booked	adm ad	Follow up appointment	testOffice123	6/4/2014 9:21 AM	6/4/2014 9:51 AM			BOAC9DED-	7A t
× 1(1)				test	Booked	adm ad	Follow up appointment	testOffice123	6/4/2014 9:21 AM	6/4/2014 9:51 AM			B7B9FF2E-8	IDE Si
				test	Booked	adm ad	Follow up appointment	testOffice123	6/4/2014 9:21 AM	6/4/2014 9:51 AM			F6E80365-1	96
Stock item EXPLORE				test1111	Booked	adm ad	Follow up appointment	testOffice123	6/4/2014 9:21 AM	6/4/2014 9:51 AM			183E7C0E-0	116
E.				test1111	Booked	adm ad	Follow up appointment	testOffice123	6/4/2014 9:21 AM	6/4/2014 9:51 AM			B1BA8A0A-	40 F
	1			mage11111	Confirmed	nation that	Collans on annalatement	toreOffice112	£/4/0014 0-01 AM	£14/2014 0/E1 884				ne l

Or from the client pages (when working with a specific client or in Client EXPLORER):



In this scenario you will have an access to all basic client data and all Noah actions (i.e. audiograms, fittings, measurements, etc.).

There is another way of working in the offline mode. This scenario is applicable when you did not have the possibility to download the client's data in advance or if you were not aware that there won't be Internet connection in some location.

In this scenario you can locally create a client as a new client and then perform all Noah actions (i.e. audiograms, fittings, measurements, etc.).

Auditdata Strato-					
File Client Tools Help					
R C					
				Sreate client	×
Offline clients				Personal data	
Clear				Main Personal Information Address Gender Not defined Address Line 1	
Client Name	Home Phone	Prepared	Changed locally	Title Address Line 2	=
TestCustomer		Created locally	×	First Name Address Line 3	
FirstName1125 LastName1125	1125	7/30/2015 11:17 AM		Middle Name City	_
123 Test12345		7/30/2015 11:17 AM		Last Name Post Code	=
FirstName4154 LastName4154	4154	7/30/2015 11:17 AM		Date of Birth Birth Province	=
Thorkild Jensen	98663083	7/30/2015 11:17 AM			=
Lise Christensen	98621525	7/30/2015 11:17 AM		SS Number Country	
FirstName1901 LastName1901	1901	7/30/2015 11:17 AM		Occupation	
FirstName9330 LastName9330	9330	7/30/2015 11:17 AM			
FirstName3247 LastName3247	3247	7/30/2015 11:17 AM		Contact Information	
Elisabeth Jørgensen	75942440	7/30/2015 11:17 AM		E-mail Work Phone	
				Home Phone Mobile Phone	<u> </u>
				Other data	
				Other 1 Created Date 7/30/2015	
				Other 2 Client Number	
				Created By Client Status Client	Ŧ
				Save Canc	el
1					-

When you are online again and run Strato, it will automatically allow you to update the cloud database with the work you have performed offline, while the information in your database becomes available to all your Strato users.

Note: Strato can work and save data in the offline mode up to 14 days. Then you must connect to Internet and use the Strato online version.

For more information on working in the offline mode, please refer to the "How to use Strato Offline" document.

3. SMS Notifications

3.1 SMS Notifications – Global Settings

As an extra service to your customers and in order to reduce the number of clients forgetting their appointments, Strato now offers an SMS notification module which allows you to send appointment reminders by SMS.

The SMS Notification module is an add-on, which you could order separately in addition to your Strato license. We have selected the SMS provider in accordance with our policy for strong data security. The provider covers almost all countries.

Please contact <u>stratosales@auditdata.com</u> to get the SMS notification available in your Strato System.

In order to activate and use the SMS notification module, the following steps must be performed:

- 1. After you order an SMS notification, we will create an account for you enabling you to use the SMS notification service.
- When your account has been created and activated, you will be able to set up your SMS notifications (i.e. specify whether you want a short or long SMS message). Note: One SMS can contain up to 160 characters; if an SMS contains more characters, it will be counted as multiple SMS messages. Select the short message to ensure that you only send one SMS message.

Global Settings		X
Global Settings		
F General	Notification Settings	
Country and Region		System Settings
Client Workflow	Default country code	380
Clinic Workflow	From	Auditdata
Mandatory Fields		Auditoata
Password Policy	Message template	Short message 👻
Client Custom Fields	Template text	This is to inform you about your appointment on
Sale		<date> at <time>.</time></date>
Scheduler		<office> You cannot reply to this message.</office>
Card Reader		
🔛 Noah		
🔛 Client		
invoice		
VAT		
Notifications		

3. Now navigate to **Administration > Appointment Types** where you can specify for which appointment type you want to use the SMS notification. It is possible to activate up to 2 notifications per appointment. Normally, one reminder 1 day (24 hours) before the appointment is sufficient.

Administration		X
Administration Grices Grices Appointment Types Referral Sources Coursent Types EXPLORE Templates Client	Appointment Types	+
	Shortcut asdasdsad Color Default Duration 30 Is Active V Requires outcome Follow up visit Requires Referral Source Requires Referral Source Requires Referral Source 5 Second SMS reminder V Days in advance 5 Second SMS reminder V Days in advance 1 Second SMS reminder V Day	
	Save Cancel	2

The last step is to create an appointment. From the Scheduler page, click **New Appointment**, select the client, and then choose your appointment type (for which you activated SMS reminders). The option "Remind by SMS" will be automatically checked in this appointment.

Client	1234567	_					Pto
Location	`12	-	Start Time	7/30/2015	1	11:26 AM	•
Resource	adm adm	Ŧ	End Time	7/30/2015	1	11:56 AM	•
Status	Booked	Ŧ					
Appointment Type	SMSReminder	*	Outcome				•
Remind by SMS	✓		Mobile phone	00898989			
Created By	adm adm		Mobile phone Modified By	00898989			
				00898989			
Created By				00898989			
Created By				00898989			
Created By Comment	adm adm			00898989			
Created By	adm adm			00898989			
Created By Comment	adm adm			00898989			
Created By Comment	adm adm			00898989			
Created By Comment Referral Source Details Follow-up Visit	adm adm			00898989			



Click the **Save** button. You can mouse over the appointment to view the appointment details.

4. Usability Improvements

4.1 Article EXPLORE: Adding Supplier in Article

It is now possible to specify a supplier directly when you create an article. Previously, you had to create suppliers separately before adding any article.

Screate new Article		×	
Main data			rticle No
Name	TestArticle1	P	
Description			
Article No.]	
Туре	Ear plug 👻	۲ I	
Sub. Type	· · · · · · · · · · · · · · · · · · ·		
Supplier data Supplier			
Supplier Article No.		Add ne	w Supplier
Prices			
Purchase Price	Retail Price]	

4.2 Scheduler: Colour Coding Activities

You have always been able to define different colours for appointments. However, in all activities it was only possible to use one colour.

From v.1.7 you are able to set a different colour for every activity, thus applying an individual look and feel to your activities.

4.3 Client EXPLORE: Adding Client's Photo

Adding a photo to a client's profile for easier recognition of an individual client is now possible.

Click **Client Data** to open the client's profile for editing, then click **Browse** in the **Client Picture** field to upload the client's photo. Click the **Save** button and the photo appears on the client's page as a thumbnail which you can increase to an actual size by mouse over it.

Session History	
7/24/2015 📖	
Gient Data	🐻 Last delivered Hi
1234567 (Client) SS Number: 123456789 Contacts: Mobile phone: 00898989 Insurance: Physiciae: Physiciae: Physiciae:	Right H None
Diagnostics Pure Tone	215 10 00 AV
Fight Left	IS 10.00 AM sys Comment

You can easily remove the client's photo by clicking the red cross in the upper right corner of the photo or change the photo by clicking the **Browse** button again.

Е	dit Client					×	
	Personal data						
	Main Personal I	nformation		Address	Dele	te pictur	e
	Gender	Not defined	-	Address Line 1			Π
	Title			Address Line 2			l
	First Name			Address Line 3			I
	Middle Name			City			I
	Last Name	1234567		Post Code			I
	Date of Birth		B	Province			I
	SS Number	123456789		Country			I
	Occupation			Client Picture	Browse		

5. Support

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