



# 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 1.9.0.0.

The available languages are English, Danish, Swedish, Norwegian, and Spanish. Strato v.1.9 is certified to NOAH 4 and works with Noah v.4.6.

# 2. Noah compliance

Strato v1.9 is certified for Noah v4.6 (the most recent release of Noah from HIMSA). Therefore, Strato will automatically update Noah to v4.6 when installing or updating Strato.

## 3. Marketing Improvements

#### 3.1 Send e-mails via Client or Scheduler EXPLORE modules

You can now send e-mails from the **Client** or **Scheduler EXPLORE** modules. E-mails can be sent if this functionality is enabled under **Tools** > **Global Settings** > **Email**.



After you navigate to the **Client EXPLORE** module, select one or several clients, and click the **Email** button in the upper right corner of the application. In the *Sending emails* window, specify the e-mail template type you want to use and click **Send**.

				Search	Delete	Merge	Email	]
☆ Client Data Last Name	×	Filter		Ŧ	F 🕂 î 🕅	2		
LastName100		4 cli	ent(s) found:					
First Name			Addres	First Name	Last Name	Middle Name	Date of Birth	
			Street100	FirstName100	LastName100	MiddleName100	18-Dec-15	
SS Number			Street1003	FirstName10	LastName1003	MiddleName10	27-Nov-30	
			Street1004	FirstName10	LastName1004	MiddleName10		
Client Number			Street1008	FirstName10	LastName1008	MiddleName10	21-Feb-41	
Age From to	Female		( <b>う</b> ) s	ending emails		X		
Birthday								
From			Send	I new e-mail based o	n template			
			E-	mail template type	Client email serial lette	r sample 👻		
To								

Confirm sending e-mails by clicking **OK**. After this, selected clients receive e-mails based on your preferred template.

Sending e-mails from the **Scheduler EXPLORE** module is similar. The only difference is that you need to select one or several appointments instead of clients.

#### 3.2 Send e-mail notifications for appointments

E-mail notifications are a useful and convenient way to remind the clients about upcoming appointments.

After navigating to **Tools** > **Administration** > **Appointment Types**, select a particular appointment type and click **Edit**.

Here, you can select the **E-mail Reminder** checkbox to enable e-mail notifications. The **Days in advance** setting is used to define how many days before the actual appointment the client will receive an e-mail.



When creating an appointment, you can decide to send notifications by selecting the **Remind by Email** checkbox. You can also modify the e-mail address from which notification will be sent in the **Email** field.

**Note**: If you enable e-mail notifications for an appointment scheduled less than four hours later, the e-mails will not be sent.

Create Appointmen	t			×
Appointment Details				
Client	FirstName100 LastName100			Pto
Location	testOffice123 v	Start Time	07-Jul-15	0
Resource	FirstName LastName 👻	End Time	07-Jul-15	•
Status	Booked 👻			
Appointment Type	Initial visit 💌	Outcome		Y
Remind by Email		Email	admin@email.com	
Created by	adm adm	Modified by		
Notes				
Referral Source Details				
Follow-up Visit				
Referral Source		)		
Subcategory				
Notes				
			Save	Cancel

#### 3.3 Easier template customisation with logo and data in header or footer

Strato now includes the option of customising, certain Word templates for example with your own logo. You can also add your preferred Strato data in the header or footer of the document. First, go to **Tools** > **Global Settings** > **Reporting.** Here, you can insert a custom logo and add your preferred custom data into the header and footer.

Global Settings	X
Global Settings	
General	Report Settings
Client Workflow	Header Custom Logo Viser V
Mandatory Fields Password Policy Client Custom Fields	auditdata
Sale	Body
Card Reader Noah Client Cli	
ि PTA Reporting हिंस Email	Footer  Office  Dote  Acoustion  Acoustion
	Save Cancel

After saving the changes, open your client's screen and add a new **Client Info** document. If you click **Edit**, your Client Information Sheet template will open containing the previously specified custom data.

audito	dick here to esserted.
	Client Information Sheet
Name (Title, First, Middle, Last)	FirstName100 MiddleName100 LastName100 Gender: Female
Date of Birth: 18.12.2015	SS#: 100
Address: Street100 City: Assens	Zip: 5610
Contact Information	
Home phone: 100	Work phone: 100 Mobile phone: 100
Insurance	
Insurance: Address:	Insurance Group: Insurance Policy:
Primary Assignments	
Office: Email:	Acoustician:
Phone: Address:	
Other Data	
Physician / G.P.:	Referral: 86 år
Other1:	Other2:
Client Number: 0001891	Client Status: Client
adm adm	Click here to enter text. 05-j0/16

## 4. Invoicing Enhancements

#### 4.1 Up to two reimbursements for one item

In case of more than one insurance provider involved in the full or partial reimbursement of costs spent on a particular sale, you can have two reimbursements for a single sale item.

You set this up under Tools > Global Settings > Invoice.

Global Settings		
General	Invoice Settings	
Country and Region		Syste
Client Workflow	Description about the reimbursements usage.	
Clinic Workflow	Reimbursement 1: Insurance	
Mandatory Fields	Reimbursement 2: Insurance group	
Password Policy	Reinbursement 2. Insurance group	
Client Custom Fields		
🔛 Sale		
Scheduler		
Card Reader		
Noah		
Client		
Client Overview		
Invoice		

Afterwards, if you open client screen and create a new sale, two reimbursement fields become active. Here you can specify the costs to be covered by each provider.

🕤 Edit Sale Item	X
Article Data	
Article	Load test non serial inventory (1)
Quantity	1
Supplier	
Article Price	€0.00
VAT	25% 🔻
Sales Price	€50.00
Group reimbursement	€25.00
Reimbursement	€10.00
Private Price	€15.00
	Save Cancel

**Note:** Insurance group can be selected as the reimbursement option only if you go to **Tools** > **Administration** > **Insurance Groups** and select the **Use as insurance** checkbox in the *Edit Insurance Group* section.

#### 4.2 Delivery before invoicing in one workflow

You can create an invoice before you have made the delivery by changing your Sale Settings. Strato can guide you to avoid unintended invoicing before delivering has been completed. You go to **Tools** > **Global Settings** > **Sale** and select the **Complete delivery before invoicing** checkbox.

_				
4	3	Global Settings		
	G	lobal Settings		
		General	Sale Settings	
		Client Workflow Clinc Workflow Clinc Workflow Mandatory Fields Password Policy Client Custom Fields	Default Warranty Period (months) 24 Allow multiple suppliers of articles	Syst
		sale 🔛		

If you then click **Invoice** on a particular sale, Strato will guide you to complete the Delivery procedure before invoicing.

## 5. Calendar Improvements

#### 5.1 Predefined timeframe for calendar

When you open the calendar or switch between different calendar views, the start time is currently your local machine's time. If you prefer, you can have your calendar open with a defined timeframe so that you have an overview of your appointments in a timeframe convenient for you.

To enable this, go to **Global Settings** > **Scheduler** and specify your preferred time by selecting the **Scroll to default start time** checkbox and adding default start time in the corresponding field.

Global Settings	X
Global Settings	Scheduler Settings
Cuntry and Region Client Workflow Clinc Workflow Clinc Workflow Clinc Workflow Clinc Workflow Clinc Custom Fields Client Custom Fields	System Settings First week of the year Starts on Jan 1 * Show cancelled or rescheduled Appointments as transparent Scroll to default start time Default start time 9:00 Show Client SS number in calendar view

#### 5.2 Current date is highlighted

The current date in the calendar view is now highlighted so that you can easily see the current date.

#### 5.3 Print a Scheduler reminder letter from the calendar view

You can now print appointment reminder letters from the calendar view by right-clicking an appointment and selecting **Print Reminder**. The appointment reminder is then sent to the default printer.

Please note that the template used for printing is specified under **Tools > Administration > EXPLORE Templates > Scheduler**.

	Offices 📤	Scheduler EXPLORE 1	Templates		
	Users				Show Active on
	Appointment Types	Name	Description	Active	Predefined
FirstName100 LastName100	Referral Sources	Scheduler Explore a	This sample shows how an appointment reminder letter can be	) 🖌	×
Initial	Document Types	Scheduler Explore a	This sample shows how MS Excel can be used to create appoi	r 🖌 🖌	×
	EXPLORE Templates	Scheduler Explore :	Serial letter example that includes all possible data fields.	<ul> <li>Image: A second s</li></ul>	×
	Client	XXX		<ul> <li>Image: A second s</li></ul>	×
Edit Appointment	E-mail templates				
Delete Appointment	Scheduler				
Print Reminder	E-mail templates				
	Stock				
🚰 Change status 🔸	Sale Item				
Copen Client screen	Sale Templates				
	Stock Item Status Causes				
Edit Client	Roles				
View Client	Suppliers				
	ENTs	4			L D

#### 5.4. Better SS number visibility in calendar

It is now possible to make SS number more visible in the calendar by first setting up this functionality under **Tools** > **Global Settings** > **Scheduler**. Select the **Show Client SS number in calendar view** checkbox and then click **Save** to apply the change.

Global Settings	× )
Global Settings	
General	Scheduler Settings
Country and Region Client Workflow Clinic Workflow	System Settings First week of the year Starts on Jan 1  Show cancelled or rescheduled Appointments as transparent Scroll to default start time
Password Policy Client Custom Fields Sale Scheduler	Default start time 8:00
Card Reader	

SS number is then displayed in the tooltip as you hover your mouse over an appointment in the calendar.

🛅 FirstName100 ĹástName100 Initial		
	FirstName100 LastName100 SS Number: 100 Initial	
	11:00 - 12:00 Tuesday, July 5, 2016 FirstName LastName Odense Office Booked	e100

Appointment Details	SEARCH >>
Appointment Details: 06-Jul-16 at 13:00 - 14:00	LastName100 ×
User: FirstName LastName Office: Odense Office Client: FirstName100 LastName100 SS Number: 100	All Search SEARCH RESULTS: Clients(4) FirstName100 LastName100
adm adm	5610 Assens FirstName1003 LastName1003

It is also visible in the **Appointment Details** section and in the Quick Search.

# 6. Improvements in sorting, filtering and displaying data

6.1 Offices, users and suppliers are now sorted alphabetically.

Administration							5
Administration							
E Offices	1	Offices					
🔛 Users						Show Activ	e only
Appointment Types		Office Name	City	Phone	Address	Active	•
Referral Sources		Aarhus Office				× 1	<u>_</u>
Document Types		Malmo Office					
EXPLORE Templates		Odense Office				×	
Client							

#### 6.2 Select/deselect all when defining search criteria

When defining search criteria in the EXPLORE view using multiselect comboboxes, you can now select/deselect all options with a single click.

-	Filter				
	2871	appointments and a	tivity items were four	d: only the first 1000 are o	displayed.
	_			-	
×		Client First Name	Client Last Na	Appointment Status	User
_		FirstName6180	LastName6180	Booked	FirstName LastName
Ŧ		FirstName9547	LastName9547	Booked	FirstName LastName
		FirstName7378	LastName7378	Booked	FirstName LastName
		FirstName523	LastName523	Booked	FirstName LastName
		FirstName3896	LastName3896	Booked	FirstName LastName
		FirstName5757	LastName5757	Booked	FirstName LastName
		FirstName498	LastName498	Booked	FirstName LastName
		FirstName6159	LastName6159	Booked	FirstName LastName
	_	×□	Client First Name Client First Name FirstName6180 FirstName9547 FirstName7378 FirstName523 FirstName523 FirstName5757 FirstName498	Client First Name Client Last Na FirstName6180 FirstName9547 FirstName7378 FirstName7378 FirstName523 FirstName523 FirstName3896 FirstName5757 FirstName5757 FirstName498 LastName498	<ul> <li>FirstName6180</li> <li>FirstName6180</li> <li>FirstName9547</li> <li>LastName9547</li> <li>Booked</li> <li>FirstName7378</li> <li>LastName7378</li> <li>Booked</li> <li>FirstName523</li> <li>LastName523</li> <li>Booked</li> <li>FirstName3896</li> <li>LastName3896</li> <li>Booked</li> <li>FirstName5757</li> <li>LastName5757</li> <li>Booked</li> <li>FirstName498</li> <li>LastName498</li> <li>Booked</li> </ul>

#### 6.3 See total count for the search results in EXPLORE

Strato displays up to 1000 search results in the **EXPLORE** view. While this remains unchanged, you can now see the total number of search results by clicking the corresponding link.

								Search
Last Days	Filter		-	5 0 0 🖬 🕢	2			
Next Days	More than	1000 clients were found	; only t	the first 1000 are displ	ayed. Click here to	get total count	1	
Include today	Addr	es First Name	-	Last Name	Middle Name	Date of Birth	Gend	Client Status
Address Data	Stree	t100 FirstName100	)	LastName100	MiddleName100	18-Dec-15	Female	Client
Address	Stree	t1003 FirstName10.		LastName1003	MiddleName10	27-Nov-30	Female	Client
City	Stree	t1004 FirstName10		LastName1004	MiddleName10		Male	Client
	Stree	t1008 FirstName10		LastName1008	MiddleName10	21-Feb-41	Female	Client
Region	Stree	t1011 FirstName10		LastName1011	MiddleName10	29-Mar-35	Male	Client
	Stree	t1012 FirstName10		LastName1012	MiddleName10	18-Mar-36	Male	Client
Post Code	Stree	t1018 FirstName10		LastName1018	MiddleName10	14-Jul-24	Male	Client
	Stree	t1022 FirstName10		LastName1022	MiddleName10		Male	Client
-	- Carros	-1000 E10		1	KR Jalla Nama 40	22 L-= 20	N.4-1-	C!

#### 6.4 More search parameters in Client EXPLORE

You can now use First name, Client number, and HI Serial as search parameters in the **Client EXPLORE** view.

#### 6.5More search parameters in Sale EXPLORE view

It is now possible to use First name, Last name and SS Number as search parameters in the **Sale EXPLORE** view.

# 7. Article Enhancements

#### 7.1 New status for articles: "Removed"

Articles with serial numbers can now have a "Removed" status, which means they have been removed from stock.

General	× 🔺	Filter	· [		- G	• 1 🗖	2			
Item Status	×	1 sto	ock item(s) found							
Removed	*		Article Type	Client	Colour	Commissi	Commission Return Da	Office	Serial Numb	Status
Status Date Absolute Dates			HI BTE					88888	11111	Removed
To Relative Dates Last Days Next Days					est serial (3) s Office					
Include today				tus Remov use lost	ed					
Serial Number			Serial Num Col							
Colour										

Besides assigning the new status for the article, you can also specify the cause to the article's removal. In order to do this, you need to create all possible causes under **Tools** > **Administration** > **Stock Item Status Causes**. Click the **Add Stock Item Status Cause** button, provide the name of the cause and its description. Then select the **Is active** checkbox. Click **Save** to complete the procedure.

Mdministration			×
Administration			
Users 🔺	Stock Item Status Causes		
Appointment Types		Show Active only	_
Referral Sources	Name	Active	+
Document Types	lost	×	+
EXPLORE Templates			
Client	Create New Stock Item Status Cause	X	
E-mail templates	Create New Stock item status cause		
Scheduler	Cause		
E-mail templates	New Descented		
Stock	Name Deprecated Description Replaced by the newer model.		
Sale Templates	Is active		
Stock Item Status Causes	is active		
Roles	Save	Cancel	
Suppliers			
ENTs			

## 7.2 New "Services" article type added

There is a new article type, "Services". You can now differentiate your services from the articles for more accurate labelling.

Sreate New Article		X
Main Data		
Name		9
Description		
Article No.		
Туре	· · · · · · · · · · · · · · · · · · ·	ľ.
Supplier Data	Accessories Batteries Ear Plug	
Supplier	Earmold HI BTE HI CIC	
Prices	HI IIC HI ITE	
Purchase Price	HI Other HI RIC Other	
	Remote Control Repairs	
Settings	Services Tinnitus Masker	

# 8. Adding customer defined links

You can now add your preferred links and have easy access to them from Strato. To add links, go to **Tools** > **Global Settings** > **Links** and click the **Add link** button. Enter URL in the **Resource** field and provide the link's description. Click **Save** to complete the procedure.

Global Settings Global Settings	×
Ceneral General	Custom Defined Links
Country and Region	System Settings
Client Workflow	Description Resource
Clinic Workflow	Auditdata   Audiology solutions https://www.auditdata.com/
Mandatory Fields	
Password Policy	
Client Custom Fields	
Sale	Link Details
Scheduler	Resource: http://www.audiologyonline.com/
Card Reader	Description: Audiology Online
Noah	
Client	Save Cancel
Client Overview	
Invoice	
VAT	
Notifications	
Stock	
Links	
PTA	

All links are visible from **Help** > Links.

DSS. Only IO		
Help		
Help I		
Links	Auditdata   Audiology solutions and equipment for hearing care professionals	
About	Audiology Online	

# 9. Customised PTA frequencies

Strato now allows creating customised PTA frequencies. They can be configured under **Tools** > **Global Settings** > **PTA**. You can define any combination of frequencies to be shown in the audiograms in the corresponding reports.

After making your selection, click **Save** to complete the procedure.

Global Settings					X	
Global Settings						
General Country and Region Client Workflow Mandatory Fields Password Policy Client Custom Fields Client Custom Fields Client Custom Fields Card Reader Noah Client Client Client Overview Client Over	PTA Settings PTA Frequencies 125 250 2000 3000 Reset to default	<ul><li>✓ 500</li><li>✓ 4000</li></ul>	☐ 750 ☐ 6000	∑ ▼ 1000 ▼ 8000	Dystem Settings	
Reporting						

## **10.Add comments about clients**

You can now add comments about a client when editing the client's profile. If the comment is of high importance, you can set a flag by selecting the **Attention** checkbox.

tName100	Address Line 1 Address Line 2 Address Line 3	Street100			
	Address Line 3				
IdleName100	City	Assens			
tName100	Post Code	5610			
Dec-15	Province				
)	Country				
	Client Picture	Browse			
Client is suffering from severe-to-profound hearing loss.					
Attention 🗹					
	Dec-15	Province Country Client Picture	Province Country Client Picture Browse		

The 'high importance comment' will be visible when you search for the client from the global search. You can see a tooltip message with a comment on hover or view the comment about the client in the client's **Personal Data** section.

	SEARCH »	Personal Data
	LastName100 ×	
-	All Search	
	SEARCH RESULTS: Clients(4) FirstName100 LastName100	FirstName100 MiddleName100 LastName100 (Client) Born 18-Dec-15 (0 years old) Female Street100
	100	5610 Assens
Client is s	uffering from severe-to-profound hearing loss.	SS Number:100
	FirstName1003 LastName1003 1003 Street1003	Client is suffering from severe-to-profound hearing loss.
_	5853 Ørbæk	Contacts:
	FirstName1004 LastName1004 1004 Street1004	Home Phone: 100 Mobile Phone: 100 Work Phone: 100
	FirstName1008 LastName1008 1008 Street1008 5772 Kværndrup	Email: admin@email.com Physician: Referral: 86 år

# **11. Performance**

We are constantly monitoring the use and performance of Strato. We pay attention to which functionality is used most often, the response time etc. Based on this real-life data, we are able to optimise Strato continuously.

# **12.Additional Information**

For further information, please contact <u>stratosales@auditdata.com</u> or visit <u>www.auditdata.com</u>.