What’s New

Strato Version 2.9

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 2.9.

The available languages are English, Danish, Swedish, Norwegian, Spanish, Polish, Chinese (Traditional), German, French, Italian, Japanese and Finnish.

Strato v.2.9 works with Noah v.4.12.0.

2 DATA IMPORTS

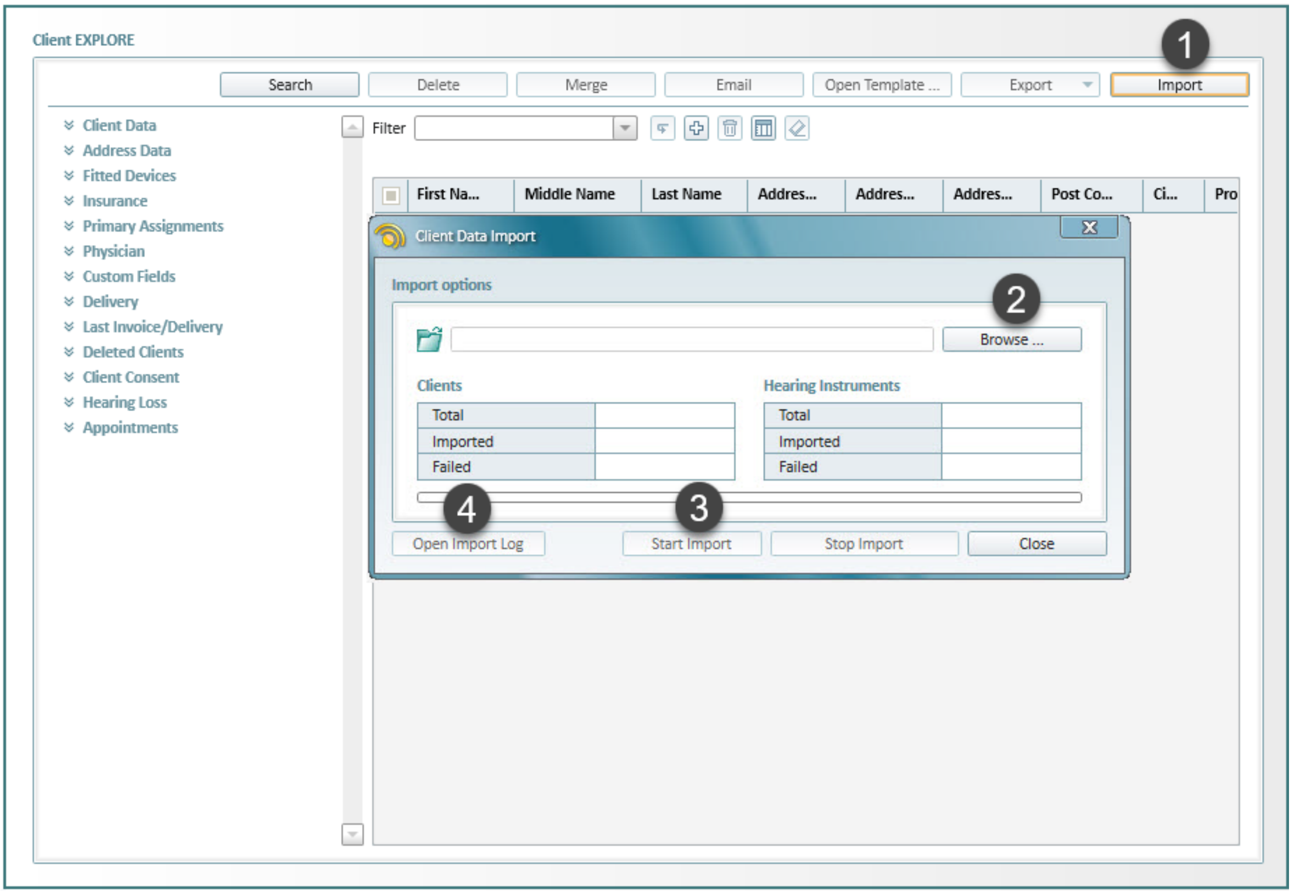
2.9 Version Strato has made it easier to import data into the system.

Should you need to update your database with information on existing clients or upload new client data from an external data source, the **Import option** allows you to do so.

Imports can now be run from the ***Client Explore***.

To initiate Import:

1. Use the **Import** button on the ***Client Explore*** Screen
2. Via **Browse**, select the data file to be imported
3. On the ***Client Data Import*** dialogue, click **Start Import**
    - View Import details in the respective tables
4. When required, check for errors by employing the function **Open Import Log**

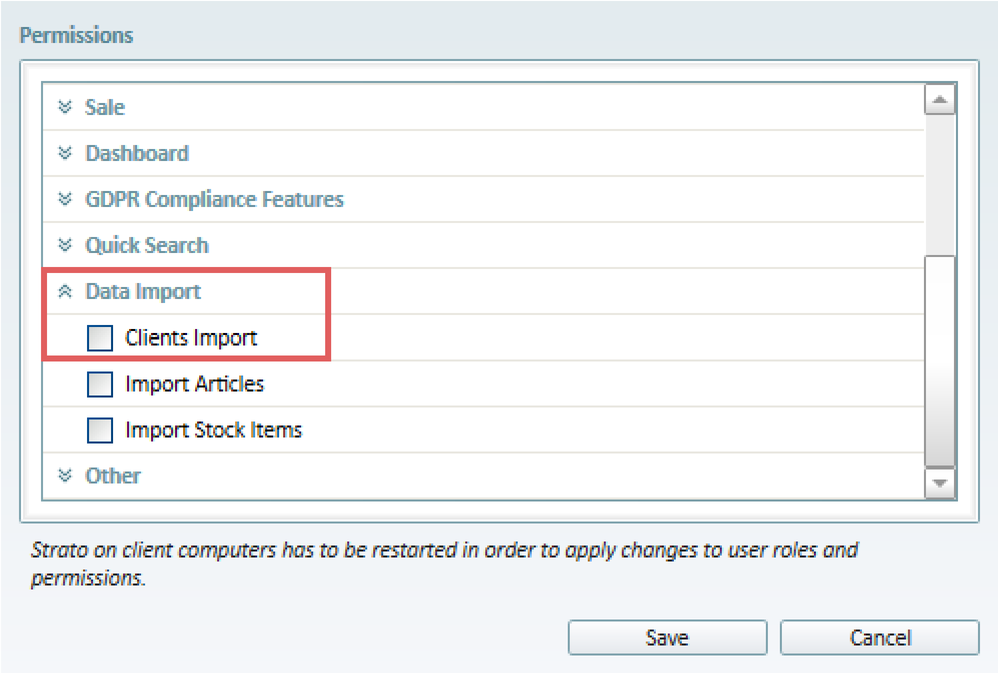


Import rules

- The Import file must be formatted as an *XML spreadsheet*
- For convenience, it is recommended to edit the XML spreadsheet in *Excel*
- In the data spreadsheet, *First Name*, *Last Name* and *Office* fields are mandatory
- *Office* must match an existing office in Strato
- If specified, *Acoustician* must match an existing User in Strato

Import prerequisites

A User in charge of imports, must have been granted the **Clients Import** Permission via the respective settings in ***Configuration > Roles***.

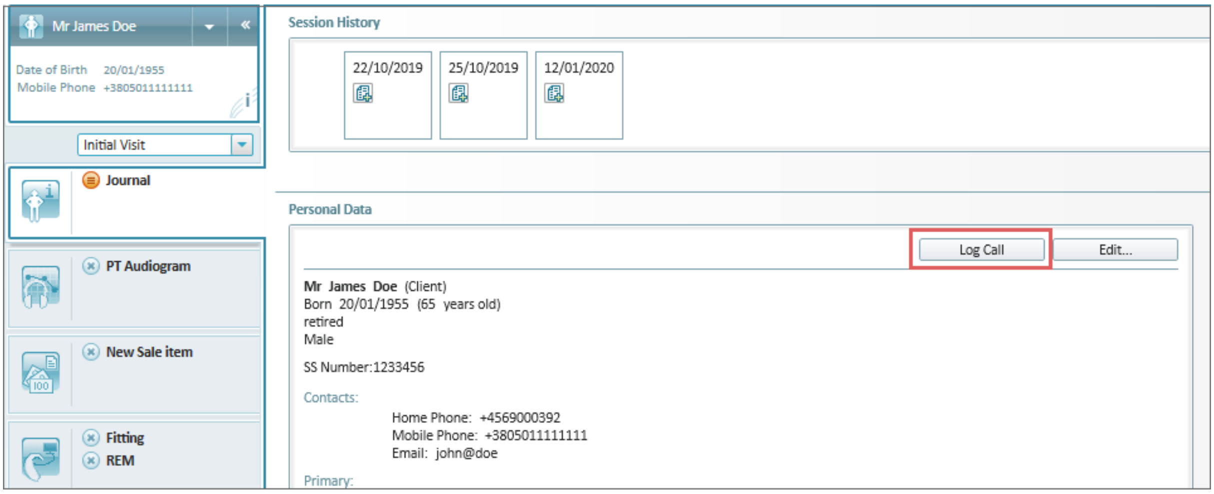


3 CALL LOGGING

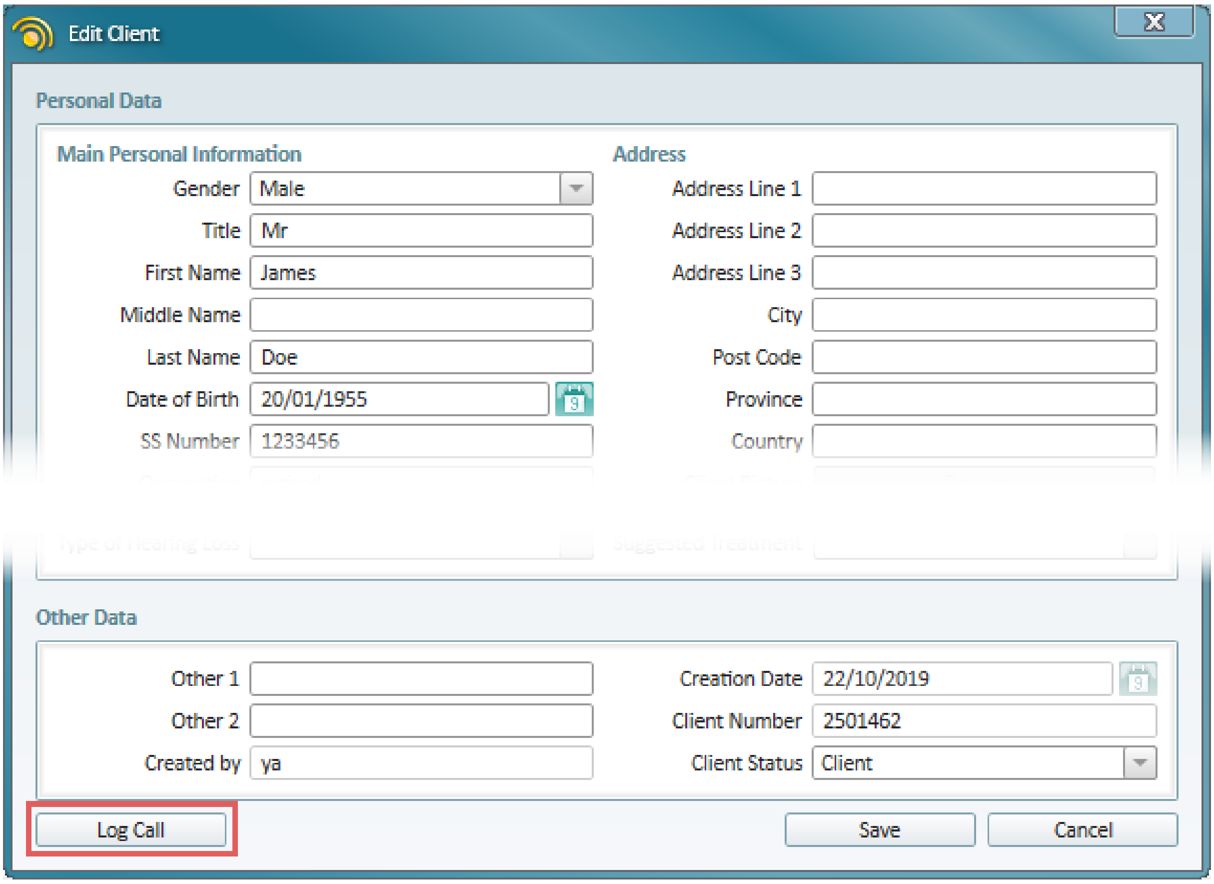
Client interaction outside of the typical in-person communication can be tracked with the new **Call Logging** feature.

The logging operation can be launched from:

1. ***Client Screen > Client Info tab***



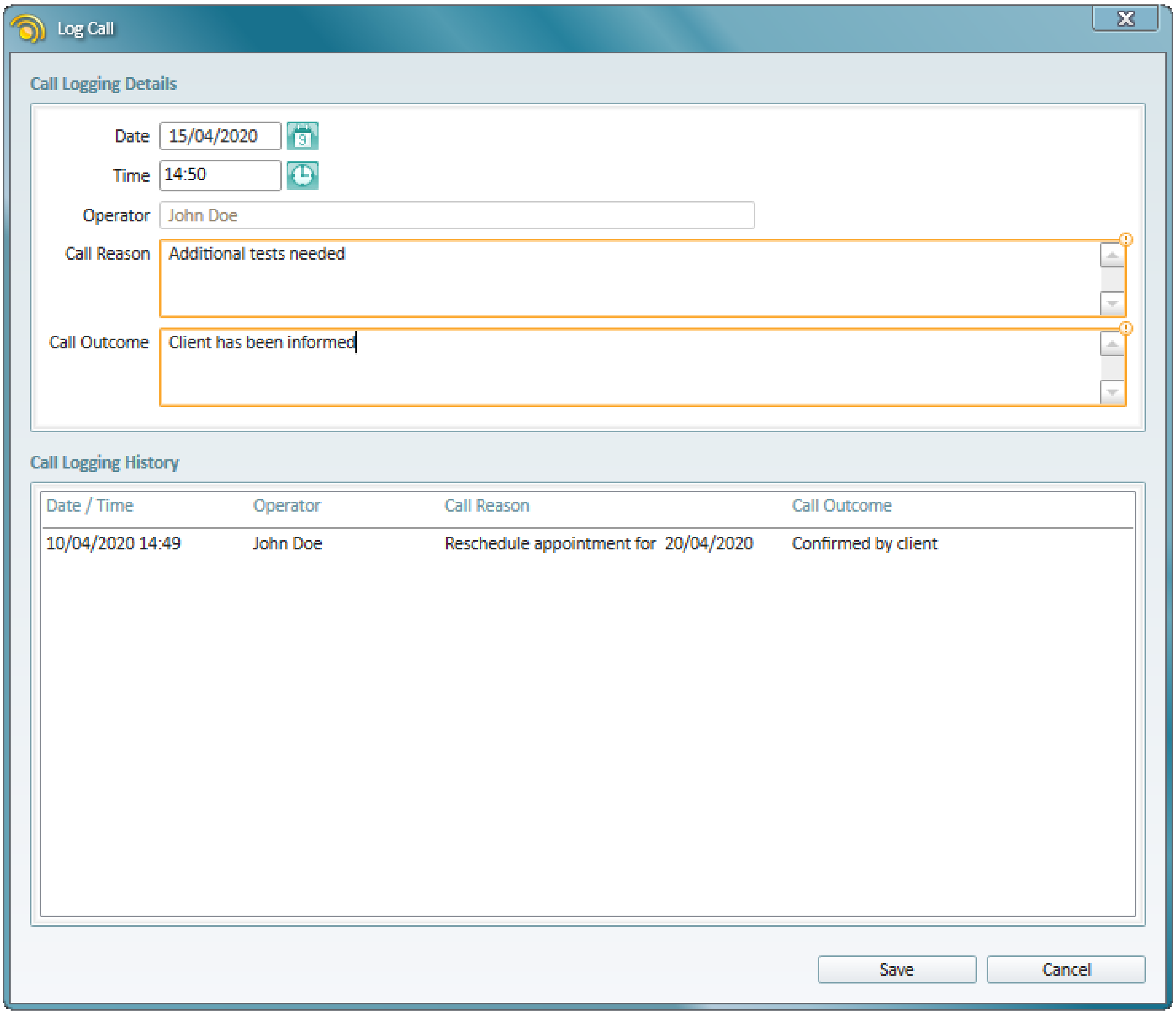
2. ***View/Edit Client*** dialog windows in ***Client Explore*** and ***Quick Search***



Logged data

When activated, **Call Logging** will record the following:

- *Date:* defaults to the current date (can be changed)
- *Time:* defaults to the current time (can be changed)
- *Operator:* the name of the logged-in user (cannot be changed)
- *Call Reason:* a field where the user can enter the important details of the call
- *Call Outcome:* a field where the user can enter the important details of the outcome of this call



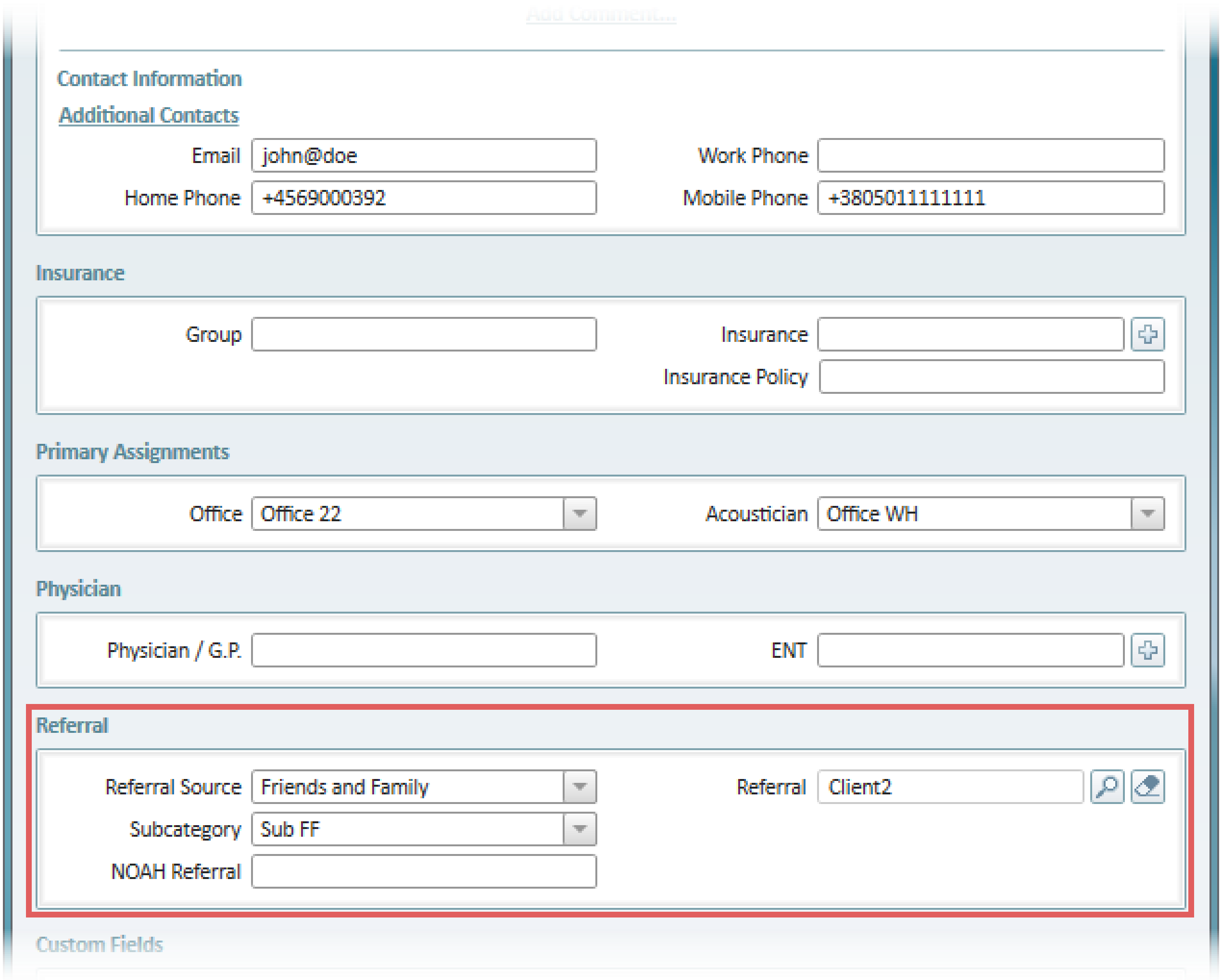
Note: Previous entries cannot be edited or deleted.

4 PROCESSING FRIENDS AND FAMILY REFERRALS

As of Release 2.9, it is possible to track Client Referrals, such as Friends and Family. For these purposes the corresponding section has been added to the ***Create/Edit Client*** dialog.

In the Referral section:

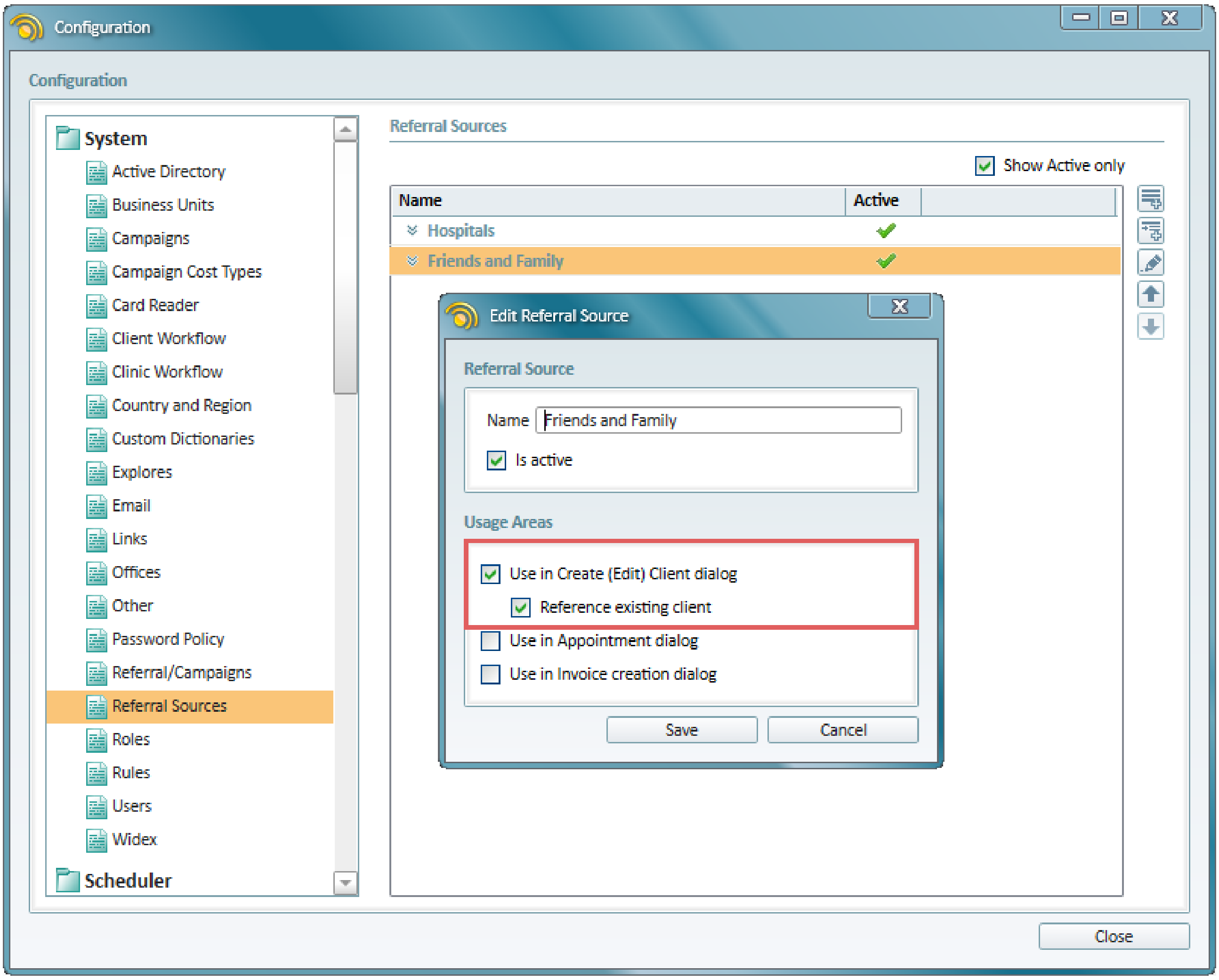
1. Select the pre-configured *Friends and Family* **Referral Source**
2. If needed, add a **Subcategory** for a more comprehensive analysis
3. In the **Referral** field, use the search button ( ) to choose a client and connect to them



Prerequisites

To enable Friends and Family referral processing, from ***Configuration > System > Referral Sources***, in the ***Edit Referral Source*** dialog window, select the following *Usage Areas*:

- Use in Create (Edit) Client dialog
- Reference existing client


Configuration
Configuration
System
Active Directory
Business Units
Campaigns
Campaign Cost Types
Card Reader
Client Workflow
Clinic Workflow
Country and Region
Custom Dictionaries
Explores
Email
Links
Offices
Other
Password Policy
Referral/Campaigns
Referral Sources
Roles
Rules
Users
Widex
Scheduler
Referral Sources
Show Active only
Name
Active
Hospitals
Friends and Family
Edit Referral Source
Referral Source
Name
Friends and Family
Is active
Usage Areas
Use in Create (Edit) Client dialog
Reference existing client
Use in Appointment dialog
Use in Invoice creation dialog
Save
Cancel
Close

5 FURTHER UPDATES

Shortcuts

[CTRL + S]

New in 2.9, this shortcut combination allows:

- Saving entered data
- Closing active dialogs
- Launching search

Note: the cursor must be placed in the text field to enable the shortcut.

[Enter]

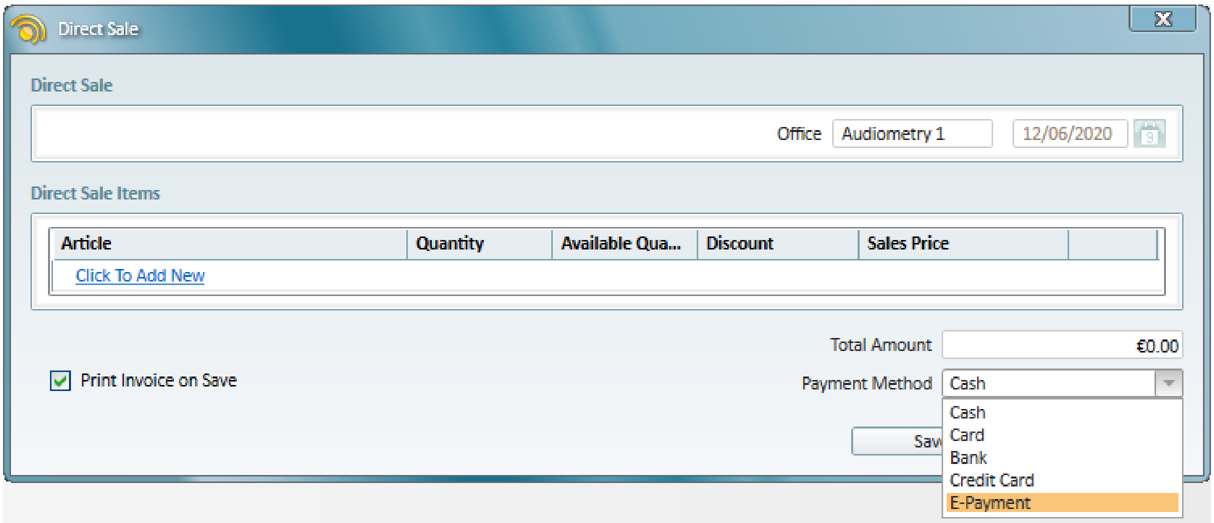
In Japanese, the ***Enter*** key is no longer used to save entries, activate search or close dialog windows. ***CTRL+S*** must be used for saving and the **Search** button for search.

E-Payment

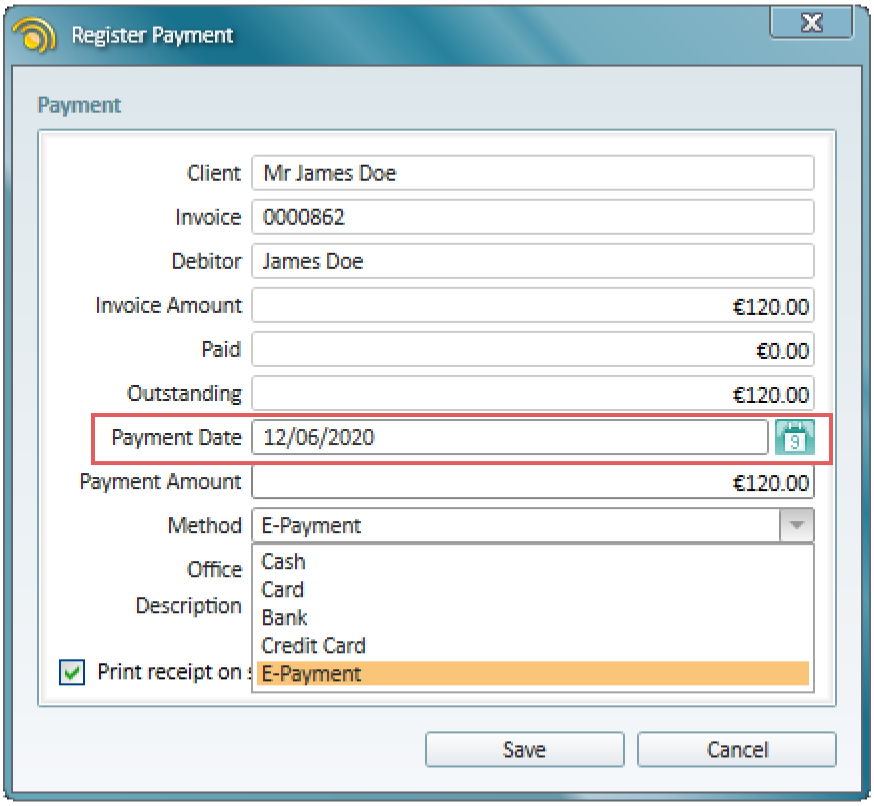
Payment methods now include a new option: E-Payment.

Along with other types of payment, E-Payment is accessible either from the ***Cashbox*** menu in the toolbar or the ***Sale*** tab on the ***Client Screen***.

1. To access from the Cashbox menu, go to ***Cashbox > Direct Sale***



2. To access from the Sale tab, go to ***Client Screen > Sale*** tab
   - In the **Current Sale** section, when registering a sale transaction, you will be able to select E-Payment as a preferred method.
   - If required, it is possible to change the payment date.

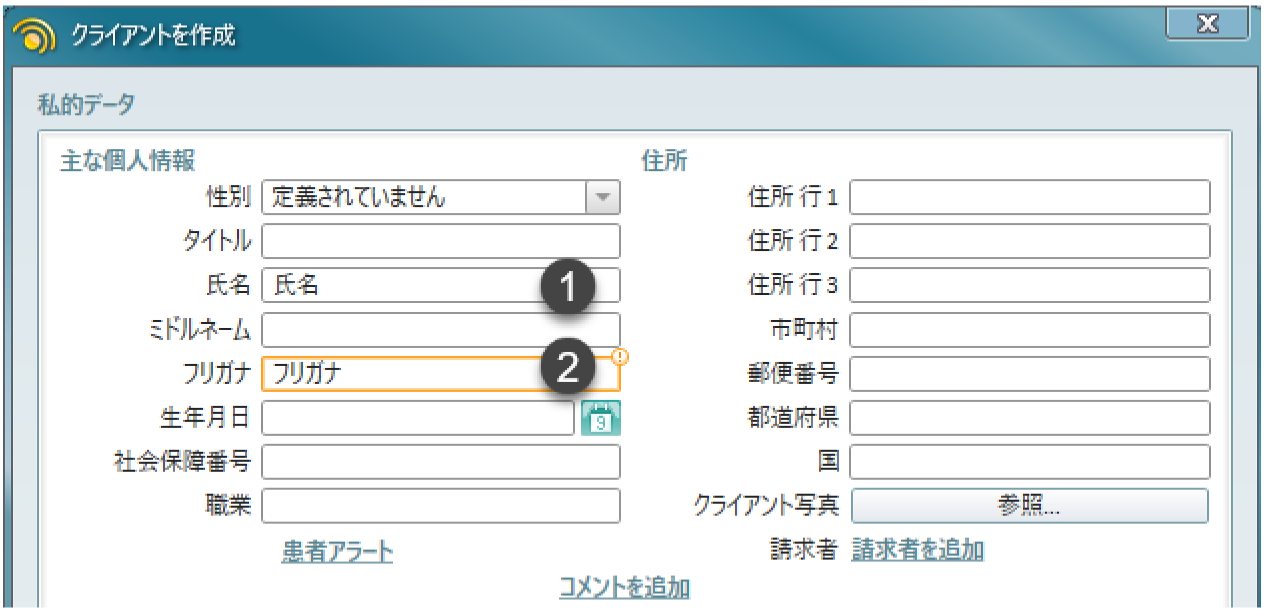


Name processing

To be handled by the system correctly, **First** and **Last Name** in the Japanese version must be written both in Kanji and Hiragana.

When adding names in Japanese:

1. In the **First Name** field, enter the full name in Kanji
2. In the **Last name** field, enter the full name in Hiragana



6 ADDITIONAL INFORMATION

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