

What's New

Strato Version 2.9



1 INTRODUCTION	3
2 DATA IMPORTS	4
3 CALL LOGGING	6
4 PROCESSING FRIENDS AND FAMILY REFERRALS	8
5 FURTHER UPDATES	10
6 ADDITIONAL INFORMATION	12

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

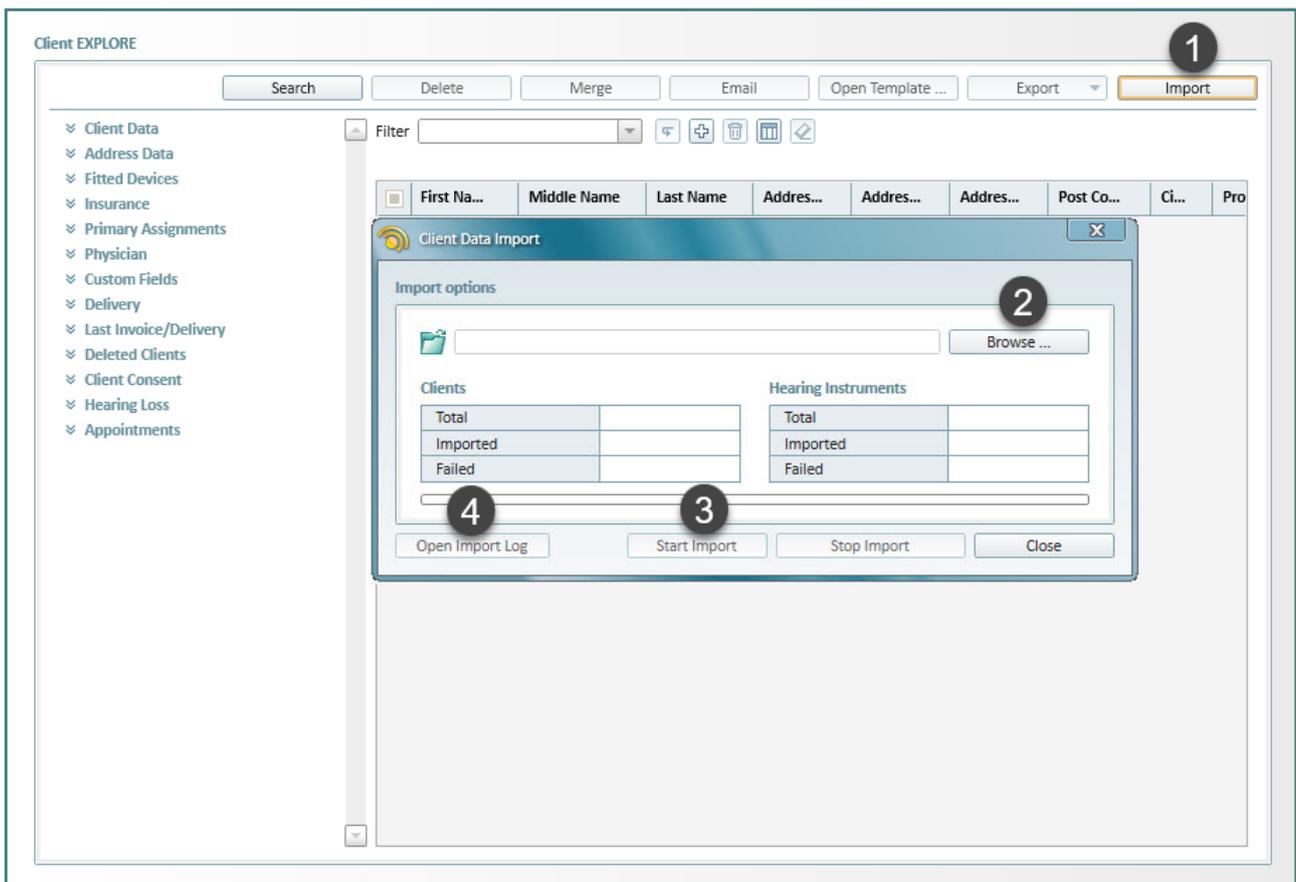
2.9 Version Strato has made it easier to import data into the system.

Should you need to upload new client data from an external data source or update your database with information on hearing instruments for existing clients, 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**

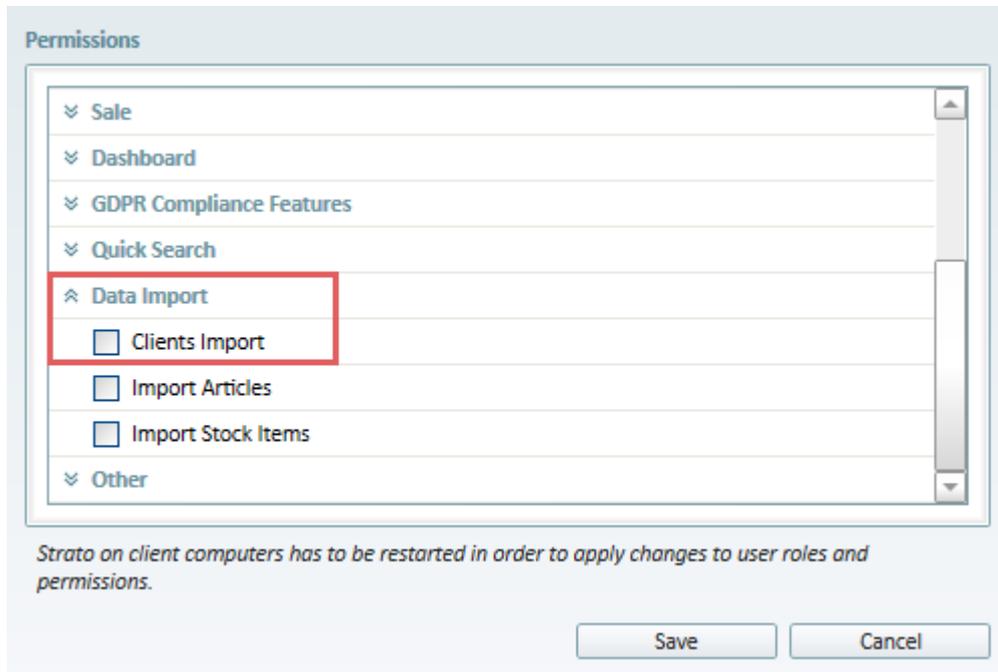


Import rules

- 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**.



Permissions

- ∨ Sale
- ∨ Dashboard
- ∨ GDPR Compliance Features
- ∨ Quick Search
- ∧ Data Import
 - Clients Import
 - Import Articles
 - Import Stock Items
- ∨ Other

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

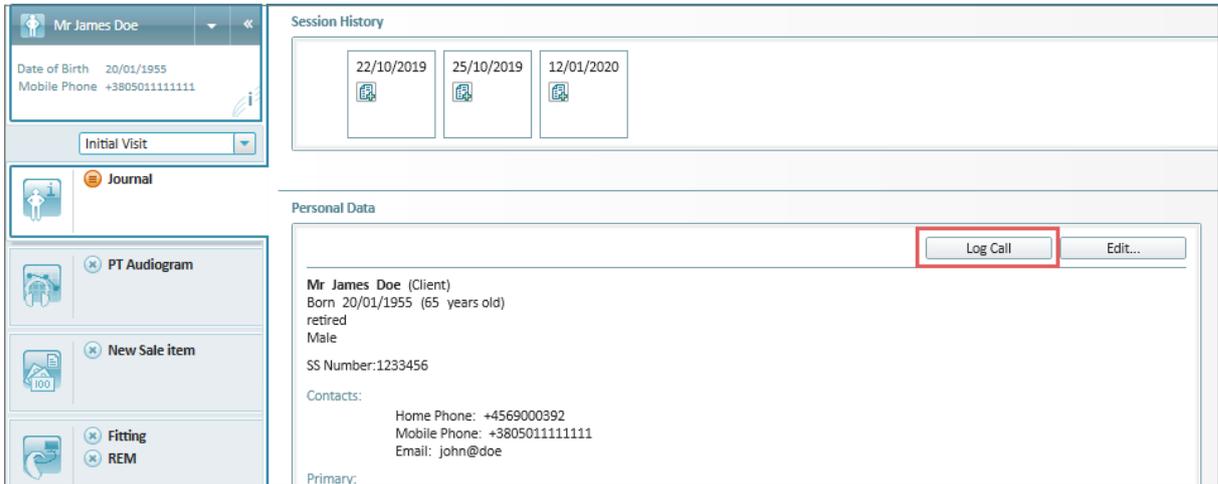
Save Cancel

3 CALL LOGGING

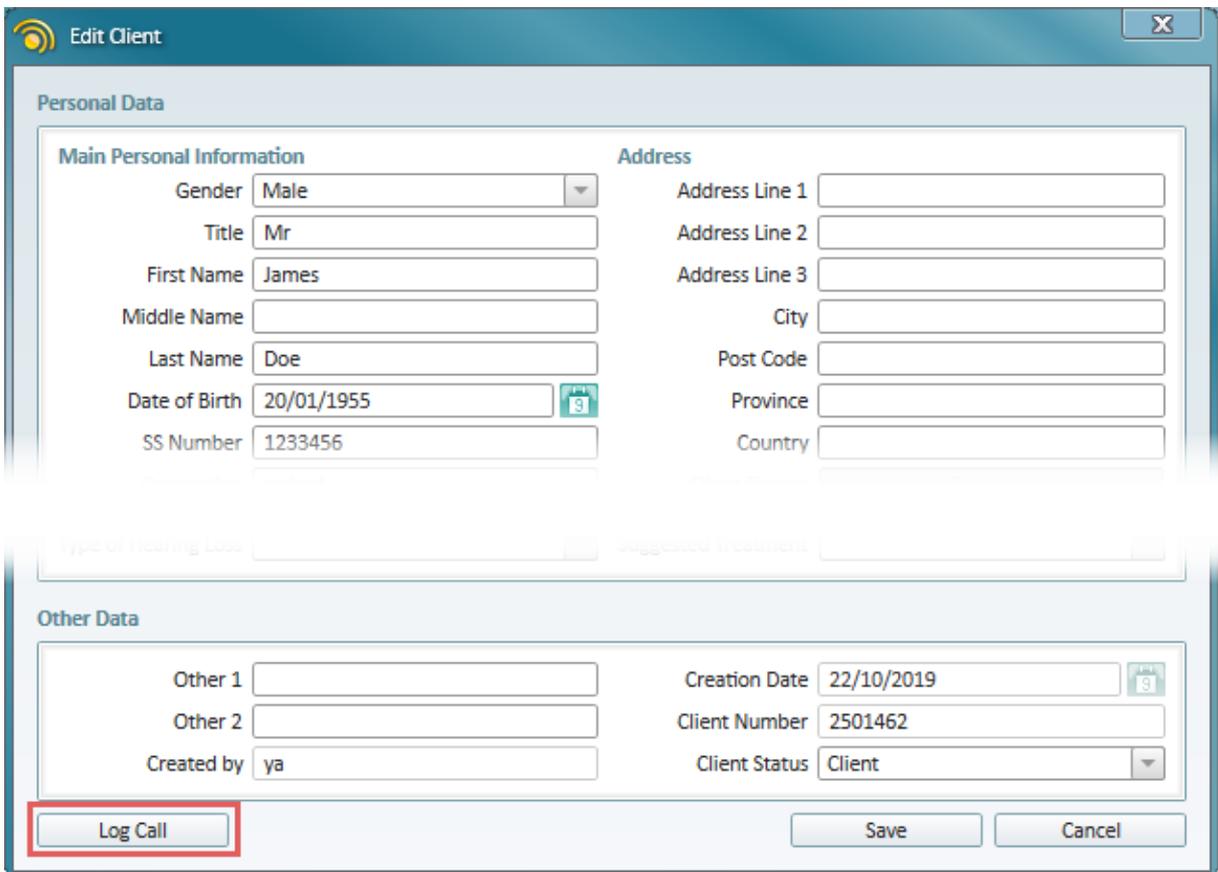
Client interaction outside of the typical in-person communication can be tracked with the new **Call Logging** feature.

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

Log Call

Call Logging Details

Date: 15/04/2020

Time: 14:50

Operator: John Doe

Call Reason: Additional tests needed

Call Outcome: Client has been informed

Call Logging History

Date / Time	Operator	Call Reason	Call Outcome
10/04/2020 14:49	John Doe	Reschedule appointment for 20/04/2020	Confirmed by client

Save Cancel

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:

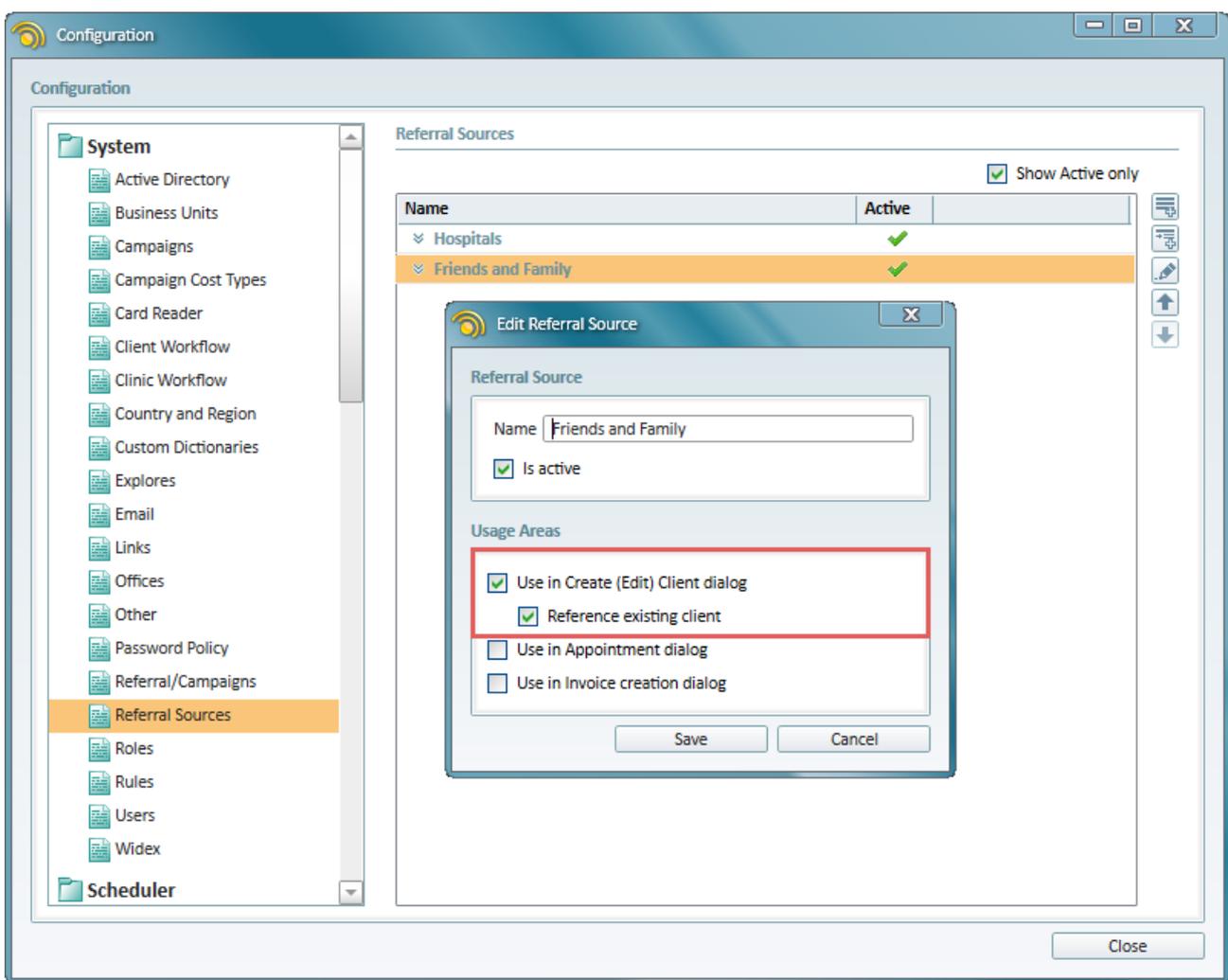
1. Select the pre-configured *Friends and Family Referral Source*
2. If needed, add a **Subcategory** for a more comprehensive analysis
3. In the **Referral** field, use the search button (🔍) to choose a client and connect to them

The screenshot shows a web form for client management. At the top, there is a link for 'ADD COMMENT...'. Below this are several sections: 'Contact Information' with 'Additional Contacts' (Email: john@doe, Home Phone: +4569000392, Work Phone, Mobile Phone: +3805011111111); 'Insurance' (Group, Insurance, Insurance Policy); 'Primary Assignments' (Office: Office 22, Acoustician: Office WH); 'Physician' (Physician / G.P., ENT); and 'Referral' (Referral Source: Friends and Family, Subcategory: Sub FF, NOAH Referral, Referral: Client2). The 'Referral' section is highlighted with a red border. At the bottom, there is a 'Custom Fields' section.

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



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]

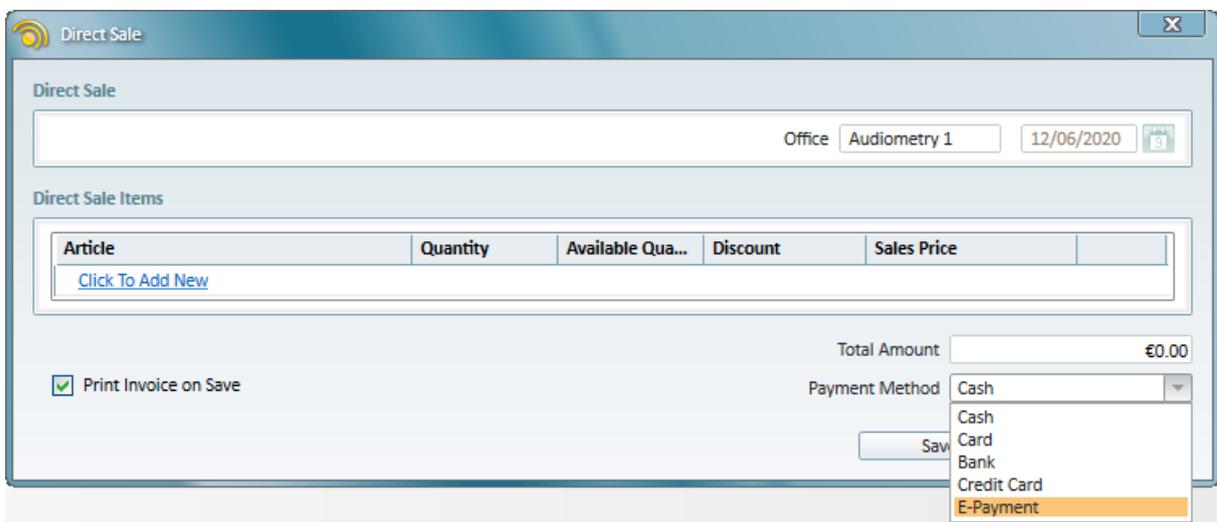
In Japanese, the **Enter** key is no longer used to save entries, activate search or close dialog windows. **CTRL+S** must be used for saving and the **Search** button for search.

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.