What’s New

Strato Version 2.6

Strato

auditdata

Your Partner in Audiology Solutions

1 Introduction

The purpose of this document is to give you an overview of the new and modified features in Strato 2.6.

The available languages are English UK, Danish, Swedish, Norwegian, Spanish, Polish, Mandarin (Traditional), German and Finnish. Strato v.2.6 is certified to NOAH 4 and works with Noah v.4.9.

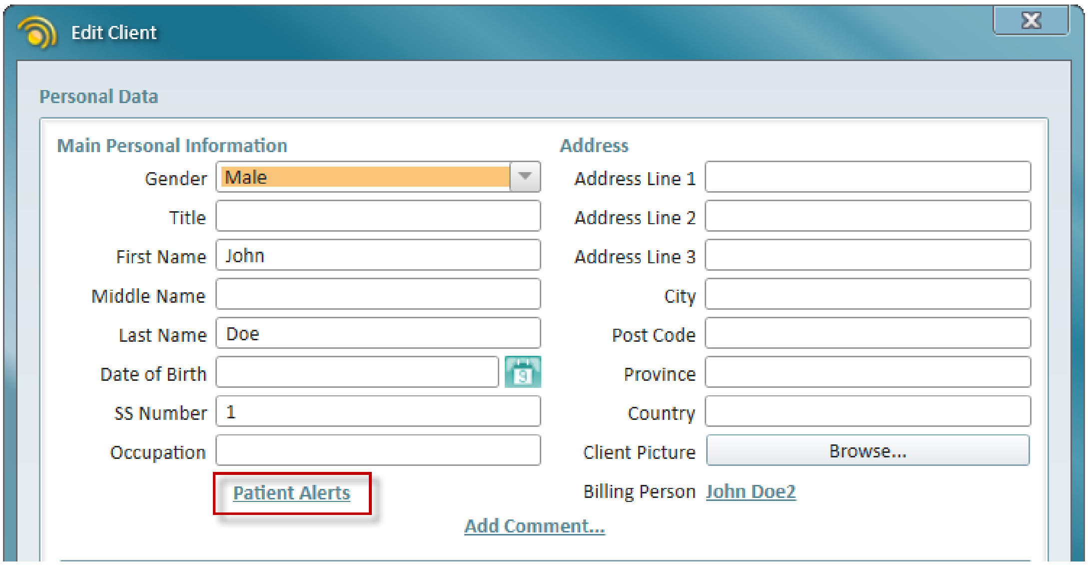
2 Scheduler

2.1 Patient Alerts

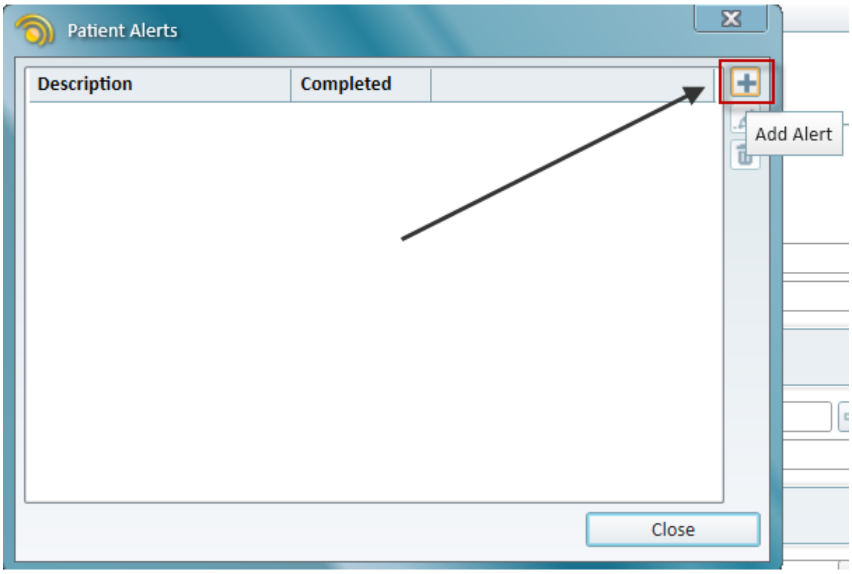
Patient Alerts allow you to create custom alerts when opening a client screen and/or an appointment with the client. This helps you to keep track of important information related to a specific patient and take the corresponding action - e.g. the patient has allergies or a translator is required.

To create an alert:

1. Start editing a client profile and then click the ***Patient Alerts*** link.

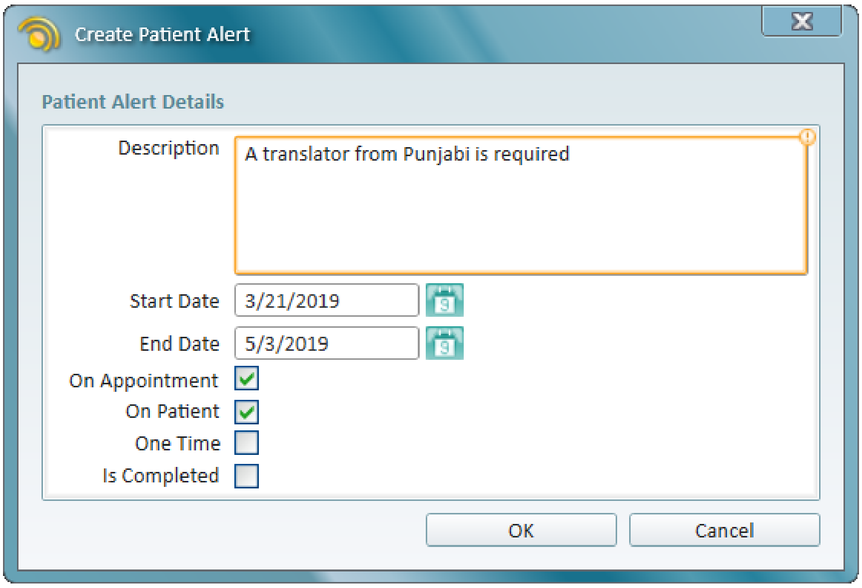


2. Click **Add Alert** to open the *Create Patient Alert* window.



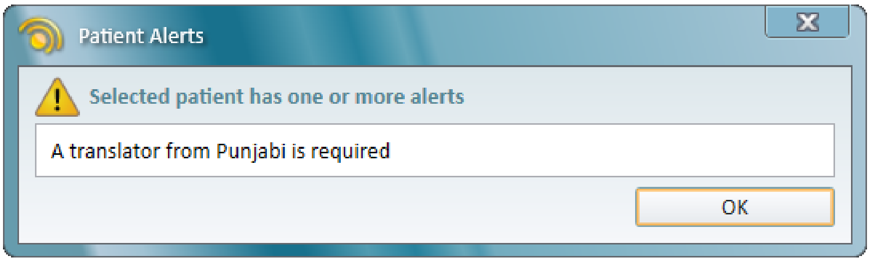
3. Enter the alert description and specify the date range when this alert must be shown. Select **On Appointment** to display the alert when creating an appointment for the patient. **On Patient** means

the alert is shown when opening a patient screen. **One Time** means the alert is shown only once; after this it will be automatically marked as **Is Completed**. If the alert is marked as **Is Completed**, it will not be shown.

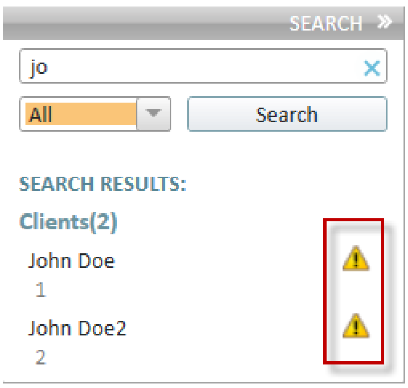


4. Click **OK**.

You can create multiple alerts for a patient and those will be displayed on a patient screen or on an appointment, depending on the settings.



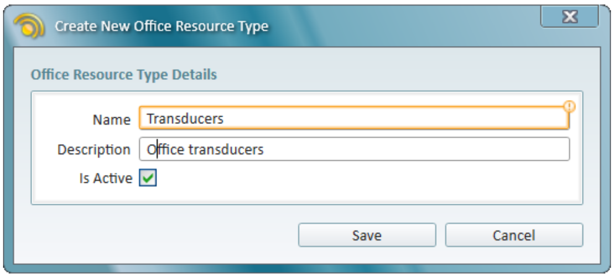
Strato will show a warning sign for every client with active alerts in the patient search results.



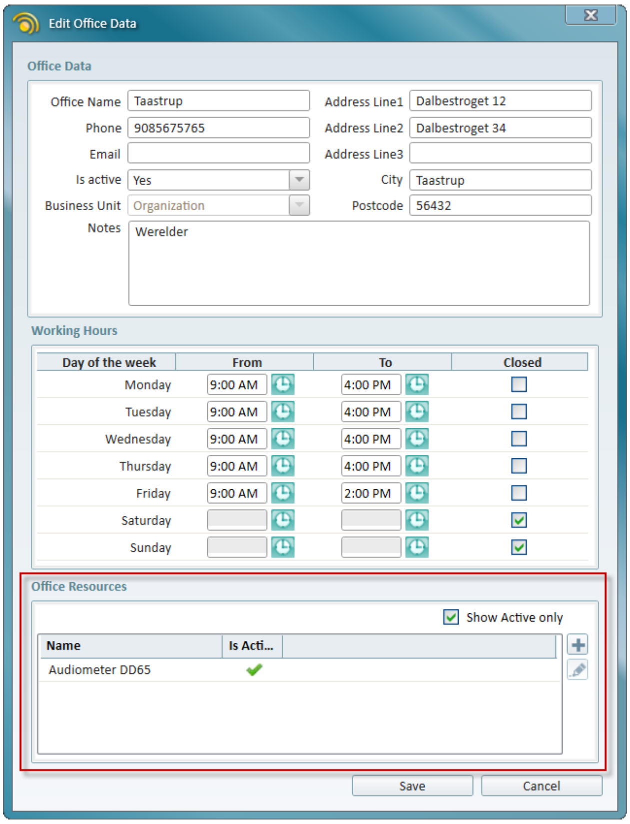
2.2 Scheduler Office Resource Management

You can now better track such office resources as sound booths, audiometers or office rooms. Simply create a resource type and assign it to the office. Then as you create appointments in this office – add a required resource. To further ensure accuracy when booking appointments and using resources, appointment reasons can be linked directly to the resources that are relevant to that reason.

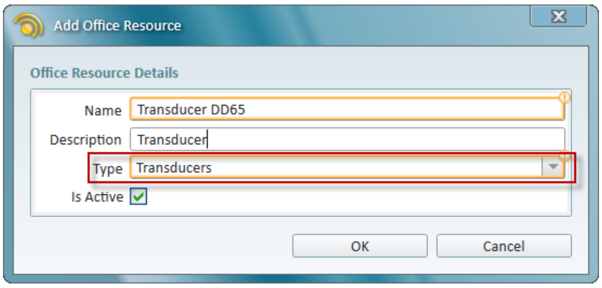
Resource types can be added by going to **Tools** -> **Administration** and selecting the **Office Recourse Types** tab. Here, click the **Add Office Resource Type** button and provide the resource type name and description. Select **Is Active** to ensure you can later add resources to this type and then click **Save**.



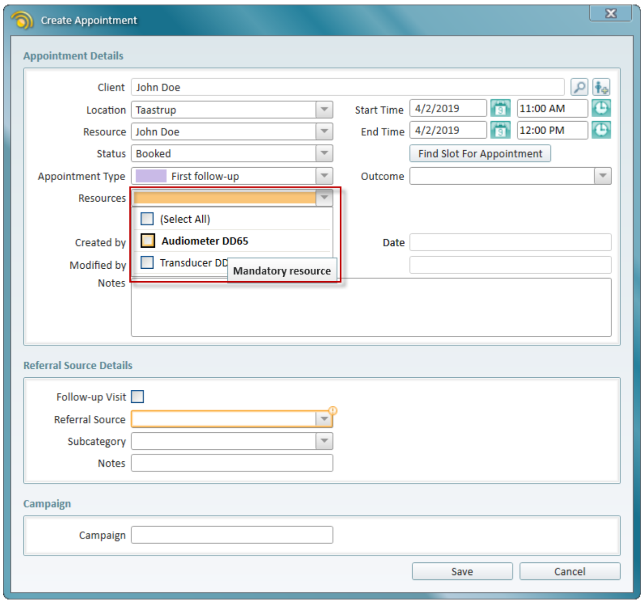
Now switch to the **Offices** tab and start editing the office to which you want to allocate resources. Available office resources are listed at the bottom of the ***Edit Office Data*** window.



Click the **Add Office Resource** button, enter the resource details and assign it to the correct resource type. Make sure the **Is Active** option is checked and click **OK**.



Now as you create an appointment, just add one or several required resources to your appointment.

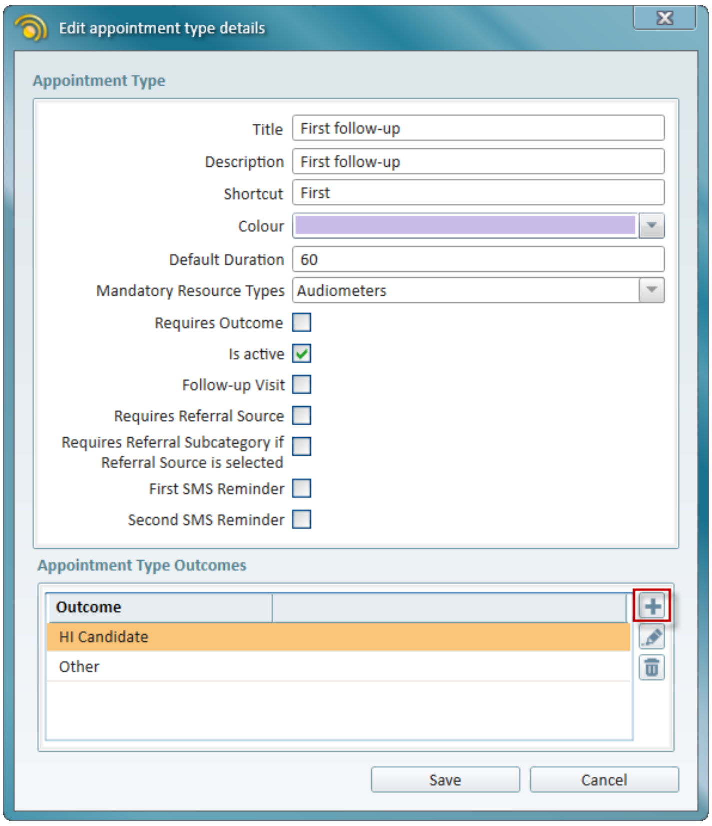


2.3 Appointment Outcomes and Actions

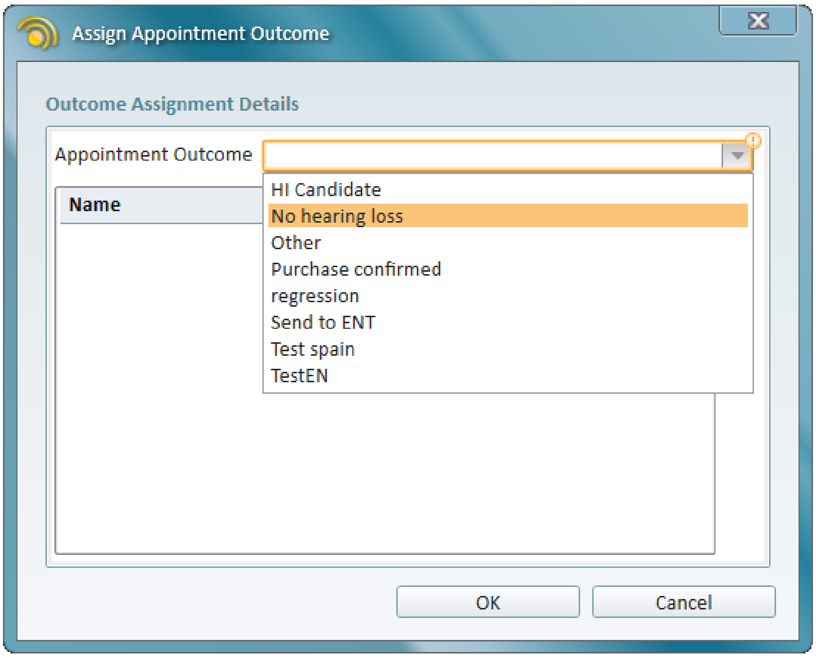
Strato now includes an Enterprise level feature allowing you to assign outcomes to specific appointment types and then add specific actions for every outcome. This way when you create an appointment of a certain type, you will be able to choose from the list of the relevant outcomes. If the outcome has one or several actions, those will be displayed – a helpful reminder to ensure a consistent client experience across the entire organization.

First, you need to assign one or several outcomes to an appointment type in Strato and then specify actions for the outcome. To do this:

1. Go to **Tools** -> **Administration** and select the **Appointment Types** tab.
2. Start editing an appointment and locate the *Appointment Type Outcomes* section at the bottom of the ***Edit appointment details*** window. Click the **Assign Outcome** button on the right panel to assign an existing outcome to the appointment type.

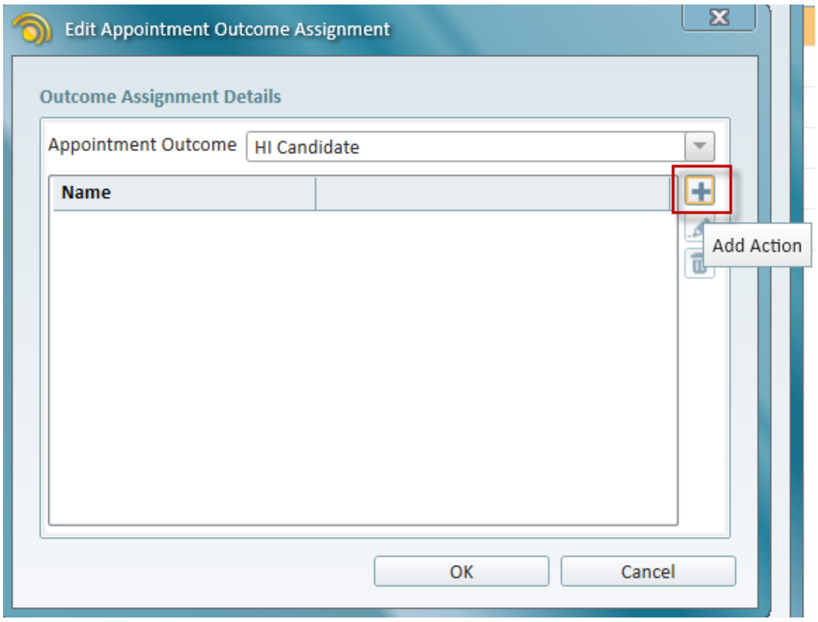


3. Select the outcome from the drop-down list.

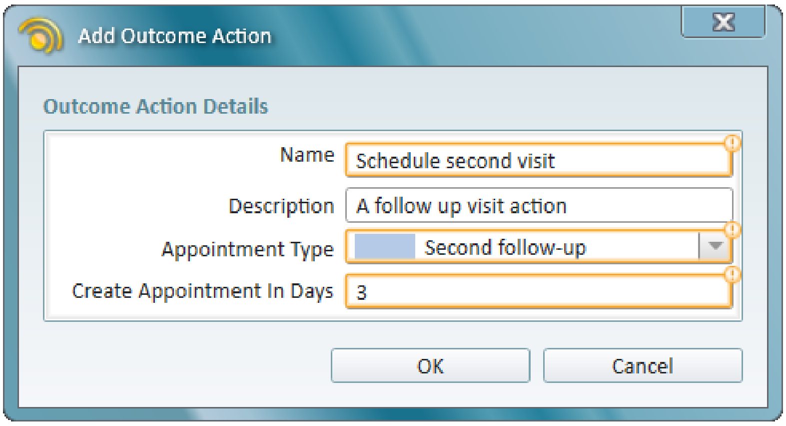


4. The next step is to make sure your outcome has actions that will be automatically displayed in the Scheduler. Click the **Add Action** button to open the ***Add Outcome Action*** window.

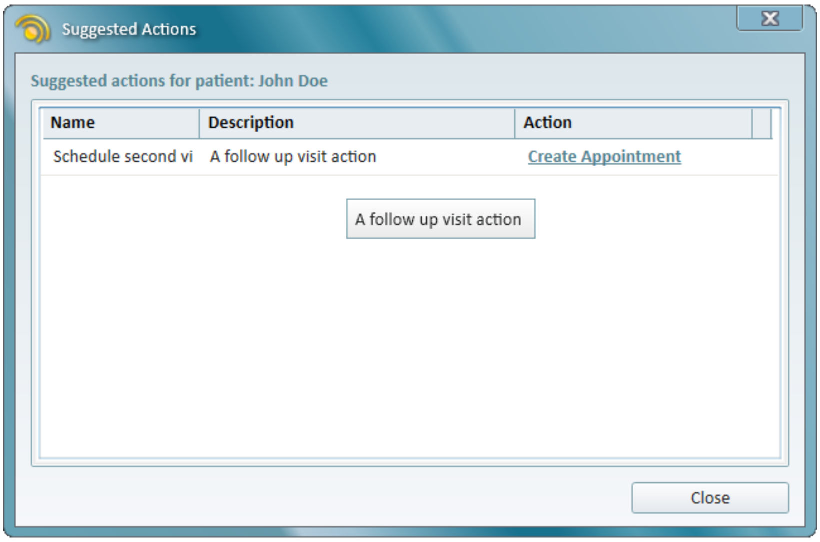
   Note: The action here is to prompt the user to create an additional appointment as a result of the current appointment's outcome. For example, if the outcome of the initial appointment results in the patient requiring a hearing instrument, then the follow up action is to schedule a second appointment where the actual HI can be fitted and sold to the client.



5. Enter the action's name and description. Then select the type for the follow up appointment and specify when the next appointment needs to be created.



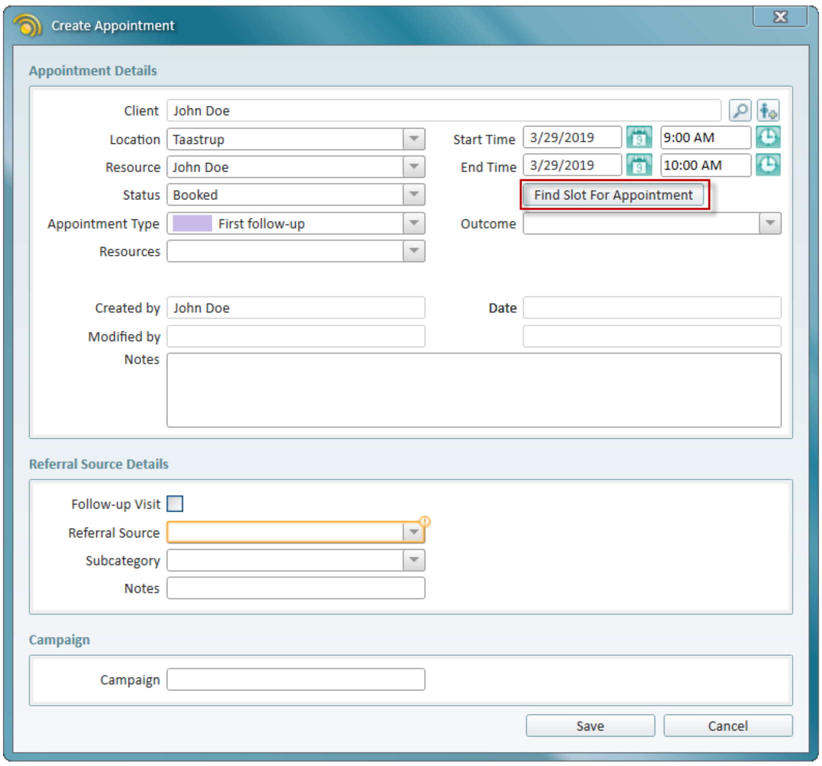
In the Scheduler, as you change the appointment outcome to **HI Candidate** and save your changes, the suggested action pops up.



Clicking the **Create Appointment** link will open the new window where the follow-up appointment can be created. The appointment type and date that you specified for the action will be set automatically. If you click **Close** instead, there will be no further actions.

2.4 Find Slot for Appointments

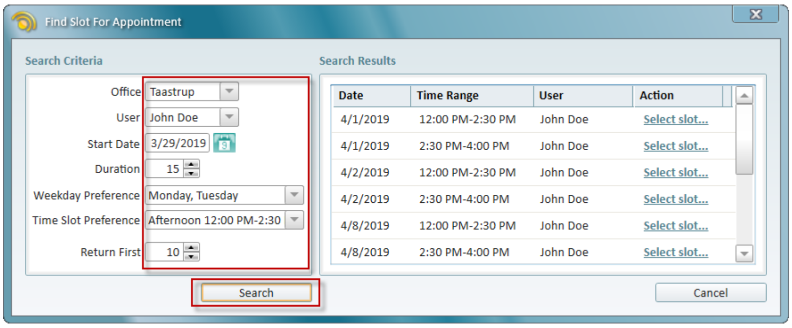
With busy appointments calendar finding the right spot for the appointment might become a challenge. Now you can do it in Strato just with a few clicks. Start creating an appointment and locate the **Find Slot For Appointment** button.



Click it to open the ***Find Slot Appointment*** window. Select the office and user for the appointment. Then specify:

- Start Date
- Preferred appointment duration
- Weekday preference
- Time slot preference
- The number of results you want Strato to return for your search (max. 20).

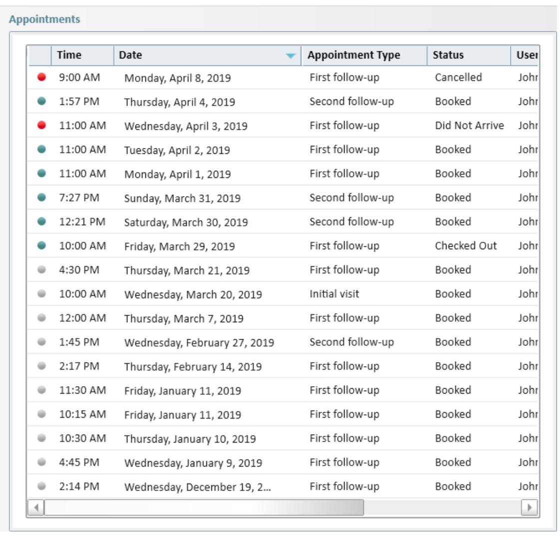
Then click **Search**.



You can now choose the appropriate time slot from the ***Search Results*** section. Find the slot suitable both for the patient and for the office specialist and then click ***Select slot...***. The correct time and date will be automatically selected and you can then create the appointment.

2.5 New Look for Appointment History

We have redesigned the view of the appointment history in Strato to ensure it is easier for you to track all the appointments. Open the client screen and go to the **Client Info** tab to find the patient appointments sorted by the date. Grey icon indicates the appointment is in the past, blue icon - appointment is scheduled for the future, and red icon means the appointment is either cancelled or the patient did not arrive.


Appointments

Time	Date	Appointment Type	Status	User
9:00 AM	Monday, April 8, 2019	First follow-up	Cancelled	Johr
1:57 PM	Thursday, April 4, 2019	Second follow-up	Booked	Johr
11:00 AM	Wednesday, April 3, 2019	First follow-up	Did Not Arrive	Johr
11:00 AM	Tuesday, April 2, 2019	First follow-up	Booked	Johr
11:00 AM	Monday, April 1, 2019	First follow-up	Booked	Johr
7:27 PM	Sunday, March 31, 2019	Second follow-up	Booked	Johr
12:21 PM	Saturday, March 30, 2019	Second follow-up	Booked	Johr
10:00 AM	Friday, March 29, 2019	First follow-up	Checked Out	Johr
4:30 PM	Thursday, March 21, 2019	First follow-up	Booked	Johr
10:00 AM	Wednesday, March 20, 2019	Initial visit	Booked	Johr
12:00 AM	Thursday, March 7, 2019	First follow-up	Booked	Johr
1:45 PM	Wednesday, February 27, 2019	Second follow-up	Booked	Johr
2:17 PM	Thursday, February 14, 2019	First follow-up	Booked	Johr
11:30 AM	Friday, January 11, 2019	First follow-up	Booked	Johr
10:15 AM	Friday, January 11, 2019	First follow-up	Booked	Johr
10:30 AM	Thursday, January 10, 2019	First follow-up	Booked	Johr
4:45 PM	Wednesday, January 9, 2019	First follow-up	Booked	Johr
2:14 PM	Wednesday, December 19, 2...	First follow-up	Booked	Johr

3 Article

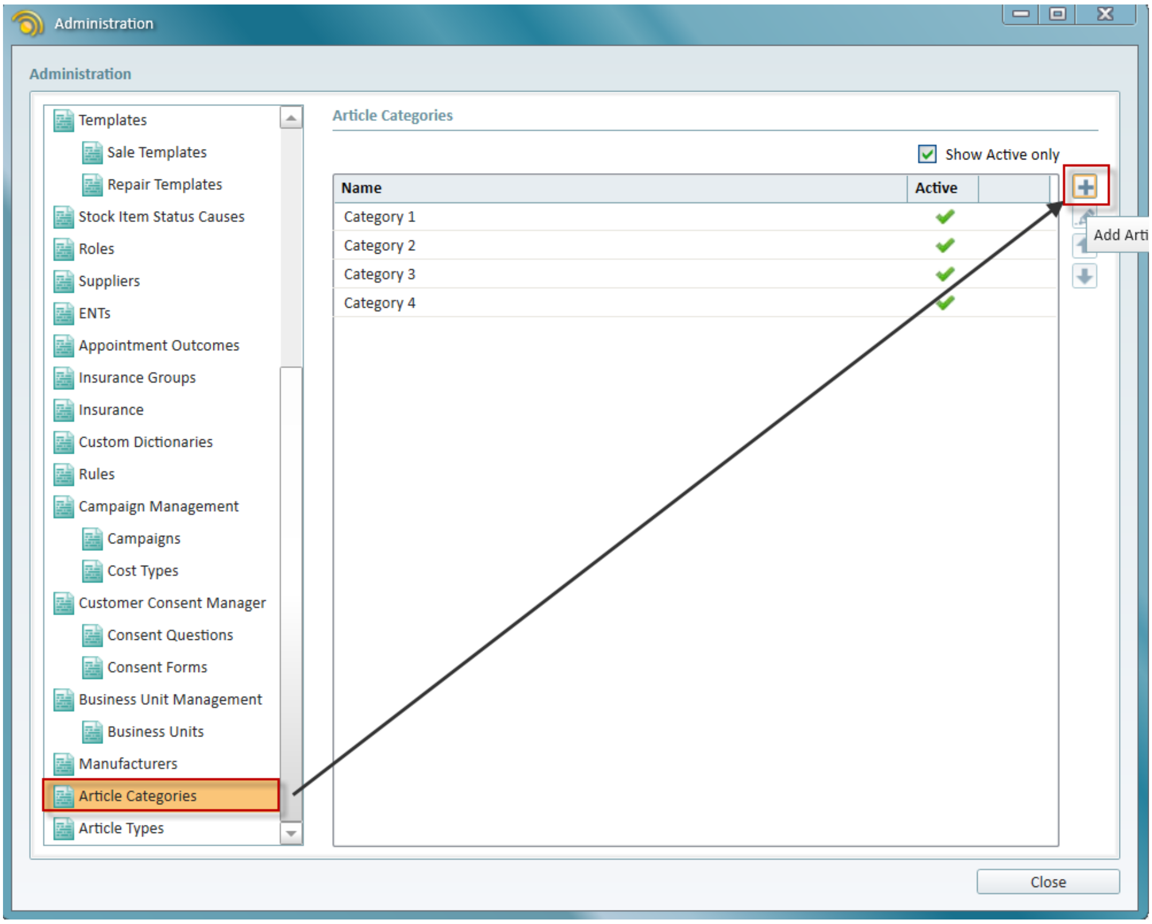
3.1 New Article Entities

We have added more ways to organize the articles in your stock. This includes the ability to assign articles to different categories, manufacturers, makes, models and styles.

3.1.1 Creating Article Categories

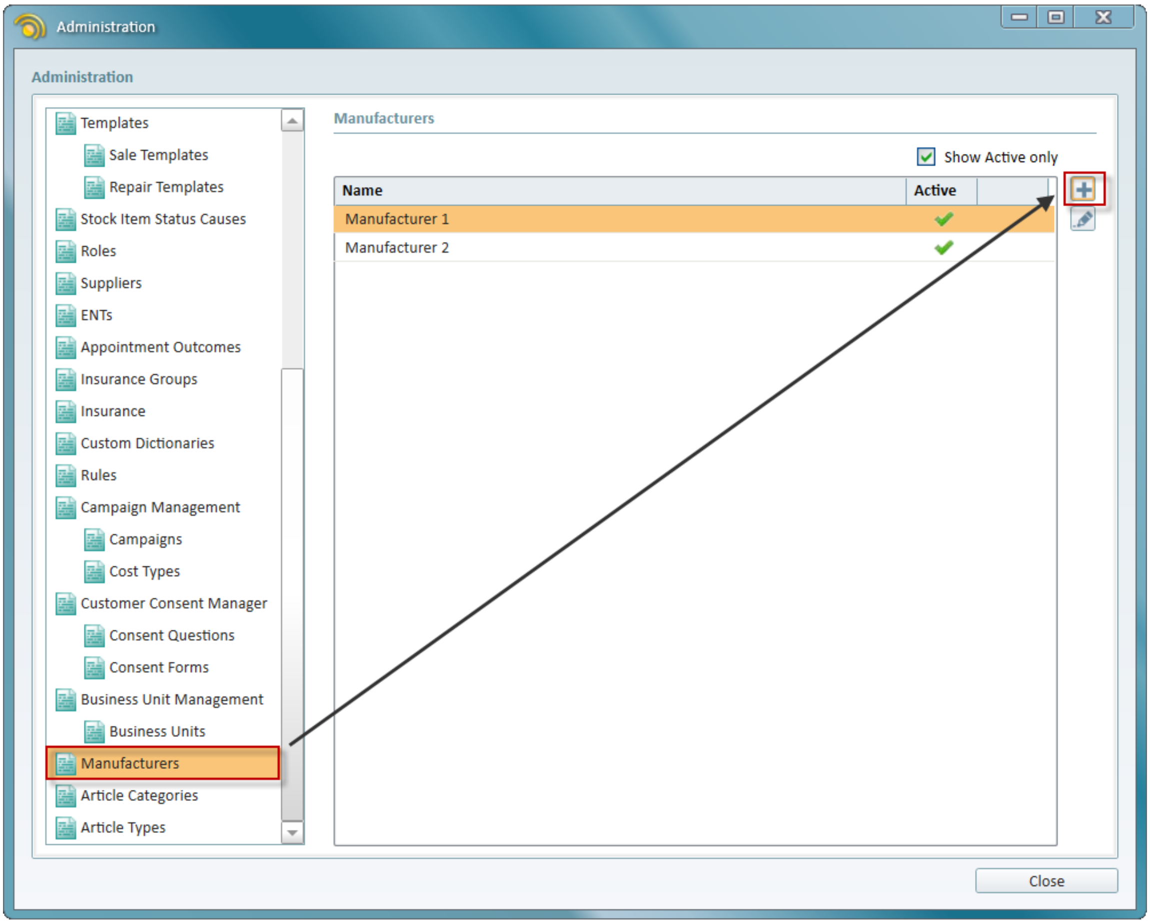
You can create different categories as an optional method of organizing your articles. One article can only be in one category. The main benefit of assigning articles into categories is the ability to create and apply Binaural and Max discounts which are described with more details in the **Sale** section . Other than that, you can apply filters to show articles that belong to certain categories.

Categories can be created by going to **Tools** -> **Administration** -> **Article Categories** and clicking the **Add Article Category** button.

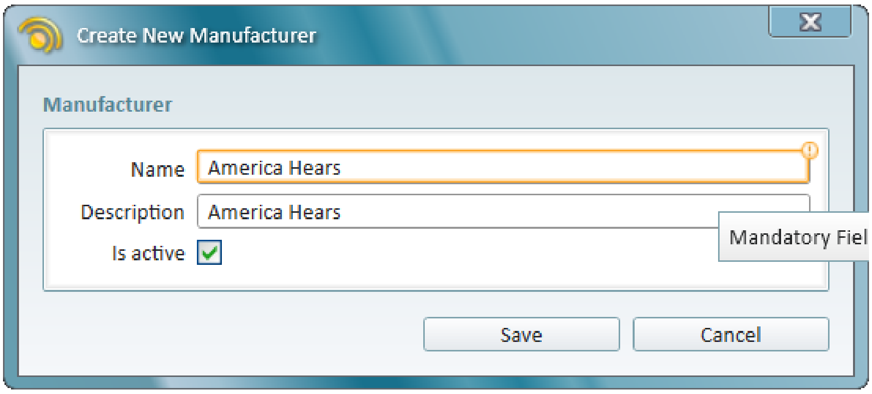


3.1.2 Creating Article Manufacturers

Creating manufacturers and then assigning them to the articles you are selling can be done from **Tools** -> **Administration** -> **Manufacturers**. Here, you can display all manufacturers or only active ones. To create a new manufacturer, click the **Add Manufacturer** button to open the ***Create New Manufacturer*** window.



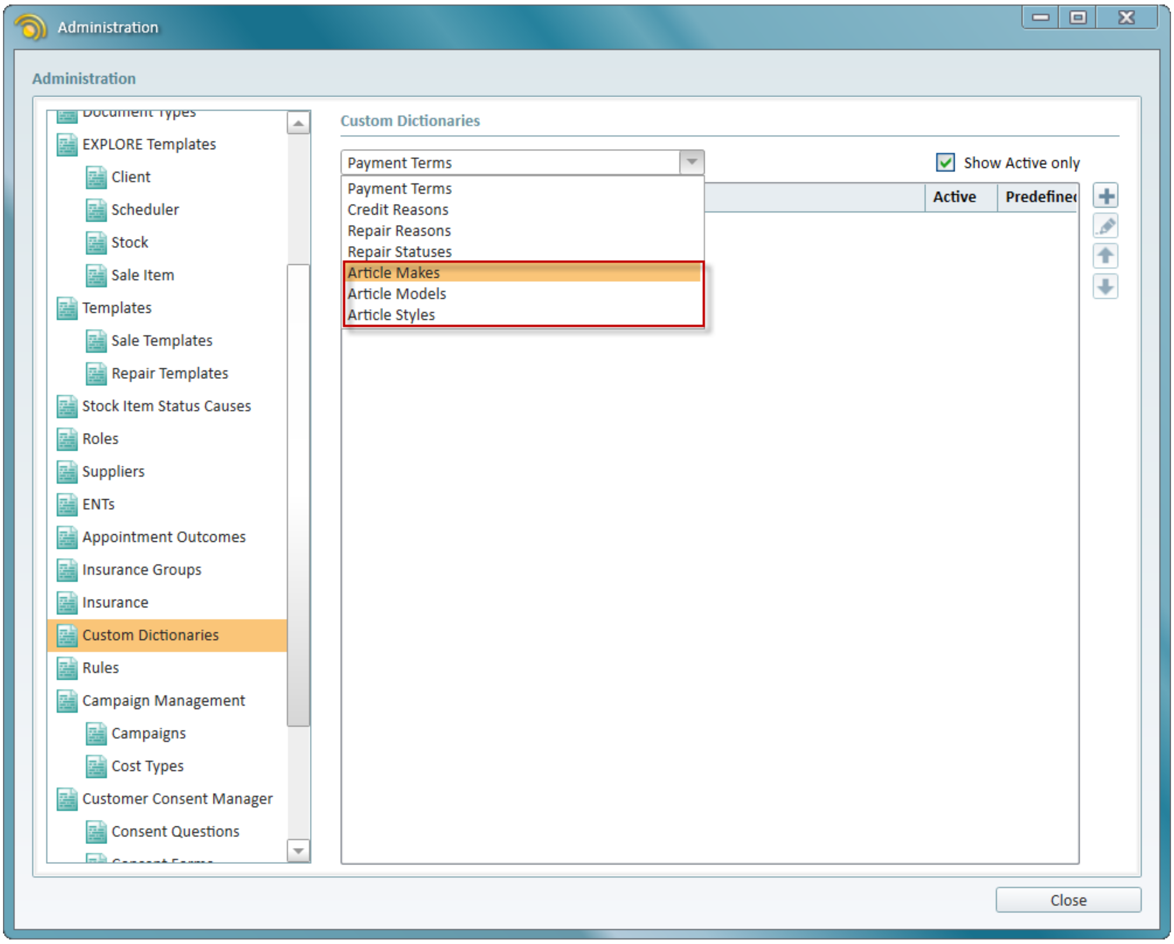
Provide the manufacturer name and description and select the **Is active** check box to ensure you can assign this manufacturer to the articles.



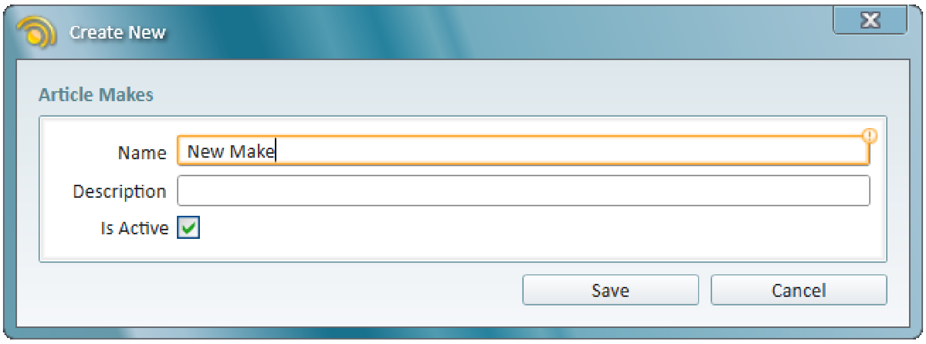
Click **Save** to complete the procedure. As with the categories, one article can be assigned to one manufacturer.

3.1.3 Creating Article Makes, Models and Styles

Finally, Strato allows you to specify even more entities for your articles - by creating article makes, models and styles. This can be done from **Tools** -> **Administration** -> **Custom Dictionaries**. You can add a make, model or style by selecting them from the drop-down list and then using the **Add** button in the right panel.

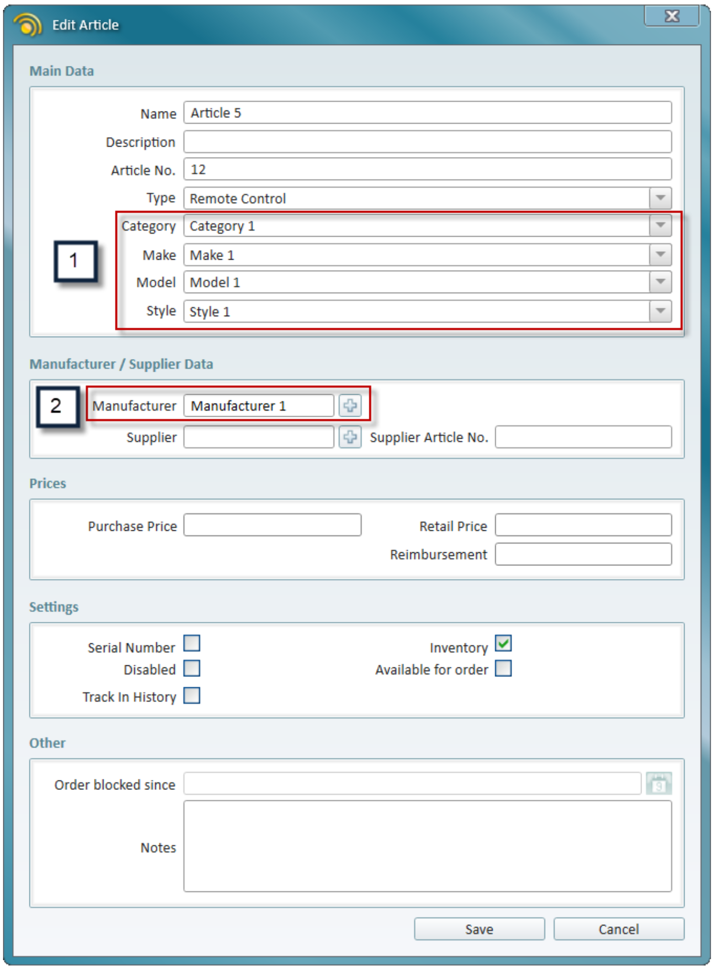


The ***Create New*** window provides the same simple interface for all entities - you need to specify name, description and set the style, model or make as active.



3.1.4 Assigning Entities to an Article

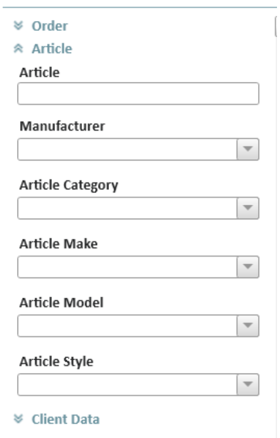
Edit an article and then select the required category, make, model or style from the corresponding drop-down lists **(1)**. Manufacturer can be added a bit below from the *Manufacturer / Supplier Data* section **(2)**.



You can also create a new manufacturer by using the **Create new manufacturer** button to the right of the ***Manufacturer*** field.

3.1.5 Filter Options in the EXPLORE views

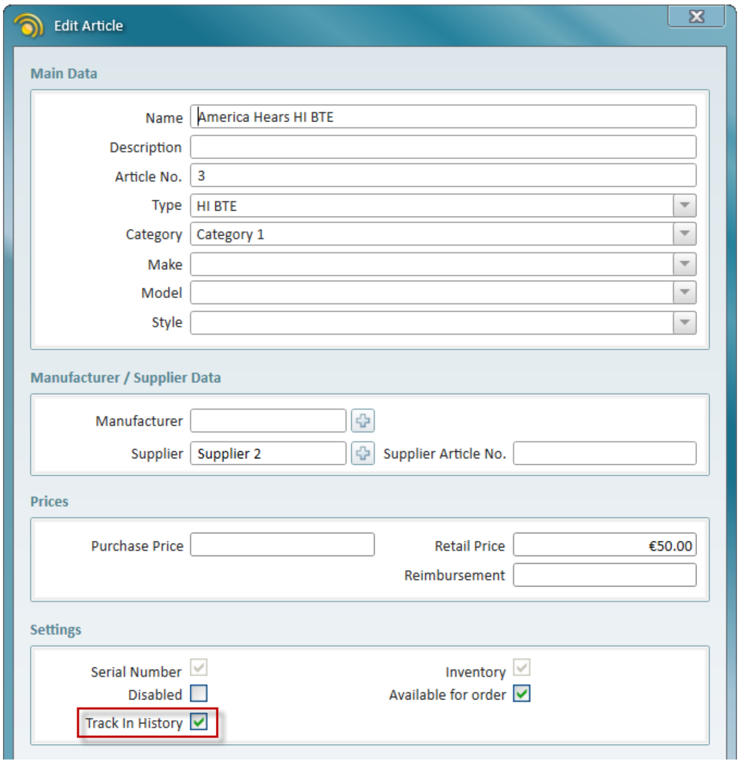
Use the filter options on the left panel to display the articles by category, manufacturer, model, make and style.



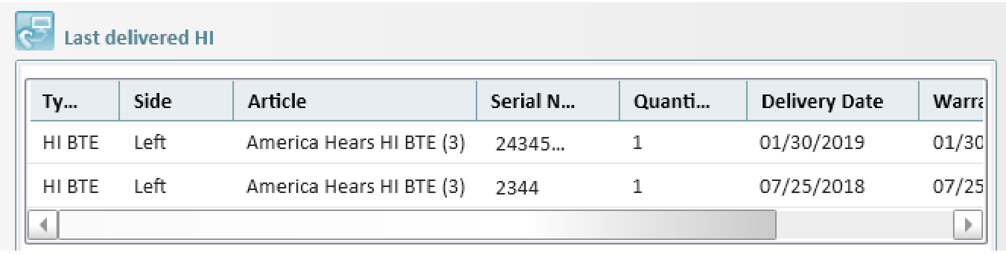
This can be done from Article EXPLORE, Sale Item EXPLORE, Stock Item EXPLORE and Order EXPLORE.

3.2 Tracking HI Articles

Select an option **Track in History** for an HI article of your choice.



Now a complete item history can be tracked on the **Last delivered HI** panel on the client’s screen. Only HI articles with the status **Delivered** and with the enabled option **Track in History** will be displayed.



4 Sale Enhancements

4.1 Binaural and Max Discounts

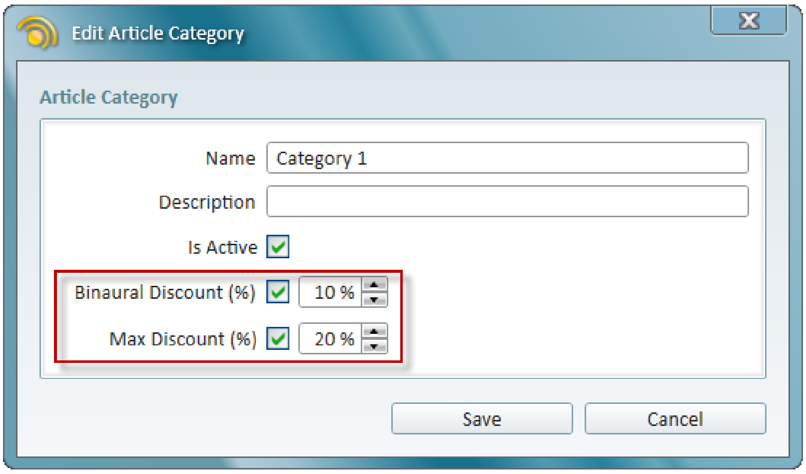
Binaural Discount is a discount that is applied if the client buys two or more articles from the same category. The discount is applied to all the articles from the same category in one sale session.

Max Discount is a setting that limits the maximum discount that can applied to the items within a single sale session.

This way you have one more way to effectively promote products to your customer base, while at the same time ensuring the total sale discount does not exceed the reasonable limit.

To set it up:

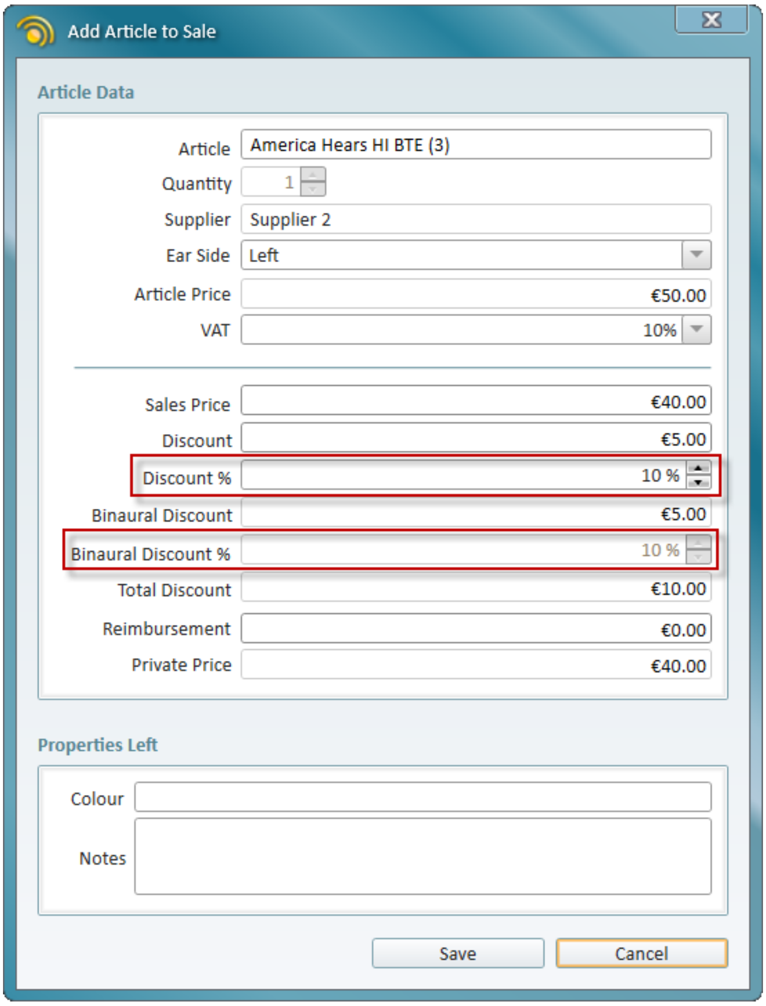
1. Go to **Tools** -> **Administration** and open the **Article Categories** tab.
2. Add a category or start editing an existing one.
3. Set the discount values according to your preferences. There are no restrictions here, but it is obvious that the Binaural Discount should not exceed the Max Discount.



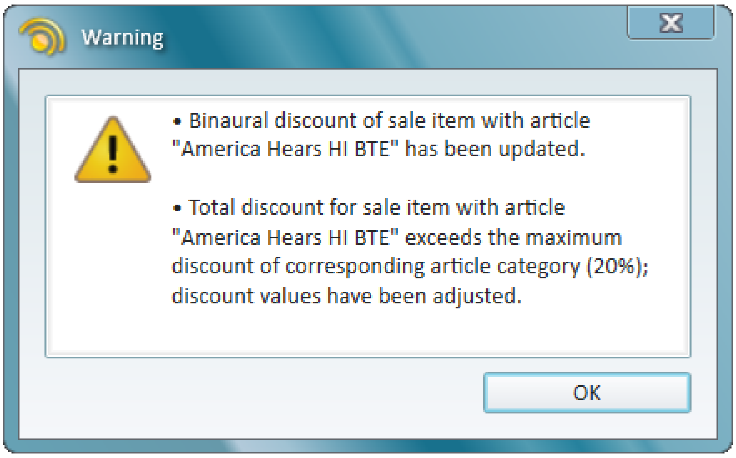
4. Make sure you set your category as active and then save your changes.

Now you can select the client and add two or more articles to the sale. These can be the same or different products but they must be from the same category.

For example, we are adding **Item 1** and **Item 2**, where each costs 50 EUR and a marketing rule discount of 10% is applied to both items. Simultaneously, a Binaural Discount of 10% will be applied. This way, the initial price total is 100 EUR and the 10% marketing rule as well as the 10% Binaural Discounts are applied, bringing the total discount amount to 20 EUR or 20%. This does not exceed the Max Discount value that we have set for this category.



However, if we change the Binaural Discount for the category to 15%, the Max Discount will be exceeded - 10% (marketing rule) + 15% (binaural) = 25% > 20% (Max Discount). The system will note this right when you add the second item to the sale and the Binaural Discount is applied. As you save **Item 2**, the warning will be displayed, notifying you that the Binaural Discount applied to this item has been updated in order to bring down the total sale discount to 20%.

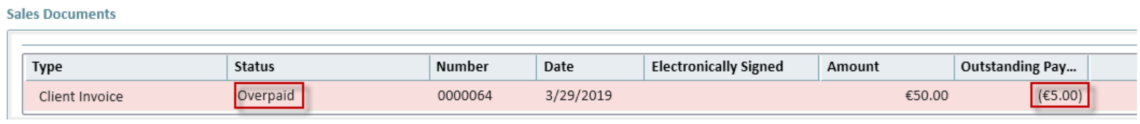


The marketing rule discount (or the discount that you manually enter in the **Discount** field when adding articles to the sale) has priority over the binaural discount.

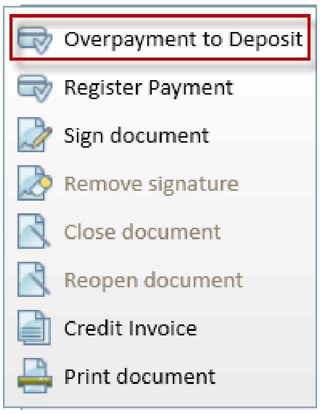
As you can see from the screen shot (initial price 100 EUR), the binaural discount was lowered from 15% to 10% to comply with the Max Discount of 20%.

4.2 Improved Payment Balance Handling

The invoices with overpayments will now have the status **Overpaid**. Such invoices are colored differently to bring your attention.



Moreover, overpaid amount can now be easily transferred over to a client deposit by clicking the invoice and selecting the **Overpayment to Deposit** option.

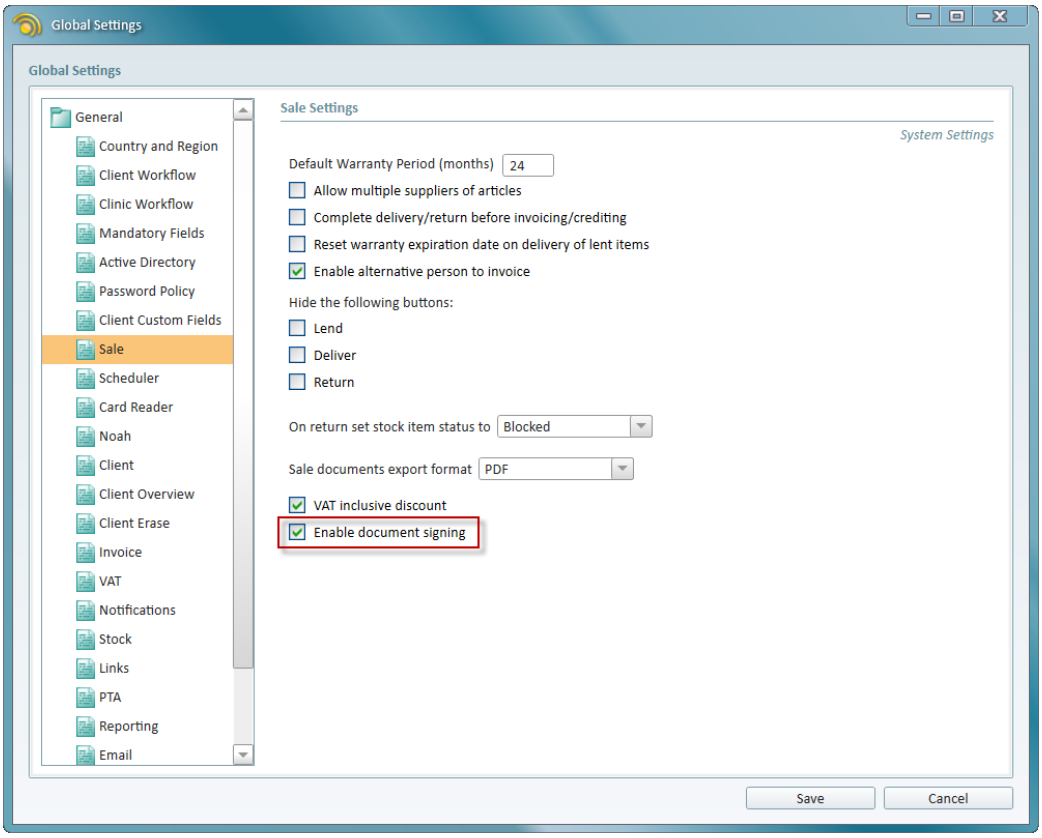


5 Other Improvements

5.1 Electronically Sign Documents

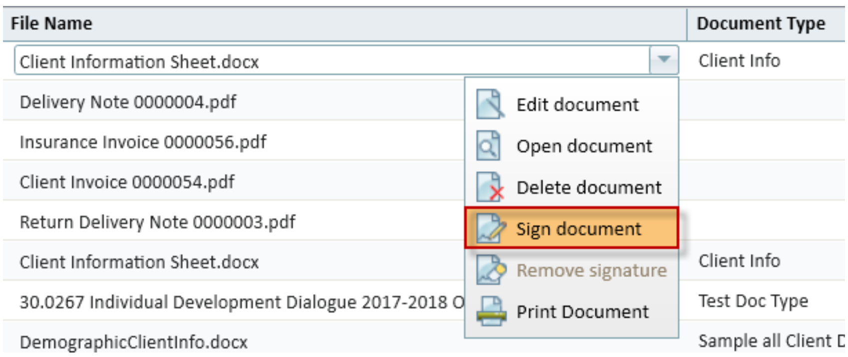
You can now sign Strato documents electronically – using the Signature Pad or the Signature feature in Adobe. This saves time and money allowing you to avoid the manual signature paperwork process.

First, you have to enable the functionality under **Tools** -> **Global Settings** -> **Sale**.



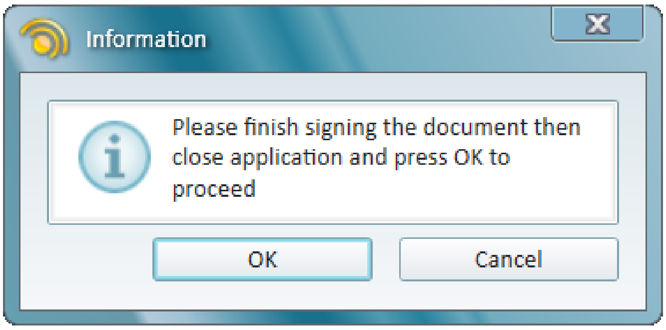
Now you can electronically sign Word and Excel documents from the client's **Sale** and **Documents** tab, as well as from the Sale Document EXPLORE view.

Select the document and then click **Sign document**.

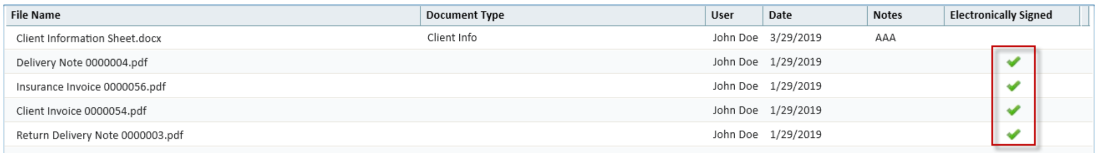


The Word or Excel document will be automatically converted and opened as a PDF file where you can enter the electronic signature. Make sure you save the signed document in Adobe before closing it and going back to Strato.

Here, click **OK** in the ***Information*** window.

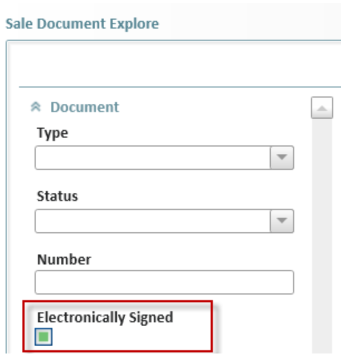


The document will now be marked as **Electronically Signed**.



File Name	Document Type	User	Date	Notes	Electronically Signed
Client Information Sheet.docx	Client Info	John Doe	3/29/2019	AAA	
Delivery Note 0000004.pdf		John Doe	1/29/2019		✔
Insurance Invoice 0000056.pdf		John Doe	1/29/2019		✔
Client Invoice 0000054.pdf		John Doe	1/29/2019		✔
Return Delivery Note 0000003.pdf		John Doe	1/29/2019		✔

This allows you to filter the documents by the electronic signature in the Sale Document EXPLORE view.

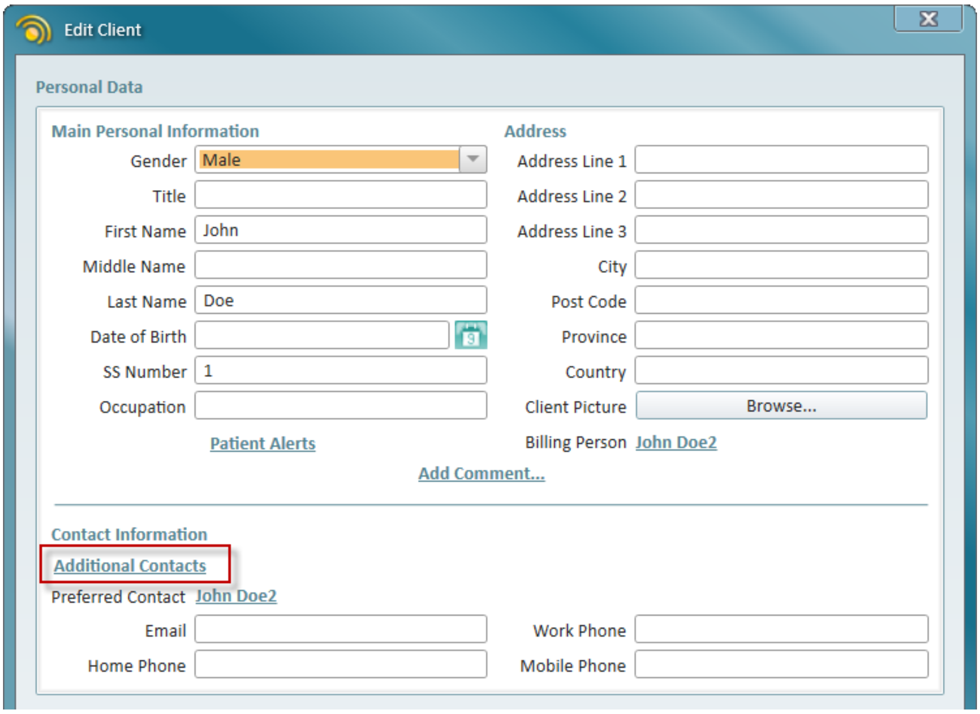


There is also a possibility to remove the electronic signature by selecting the signed document and clicking **Remove signature**. The signature is removed and the document's format is reverted from PDF to either Microsoft Word or Excel. Only users with the corresponding permission can remove the signatures. The permission can be set up by editing the user role and selecting **Remove signature** in the Client Permissions.

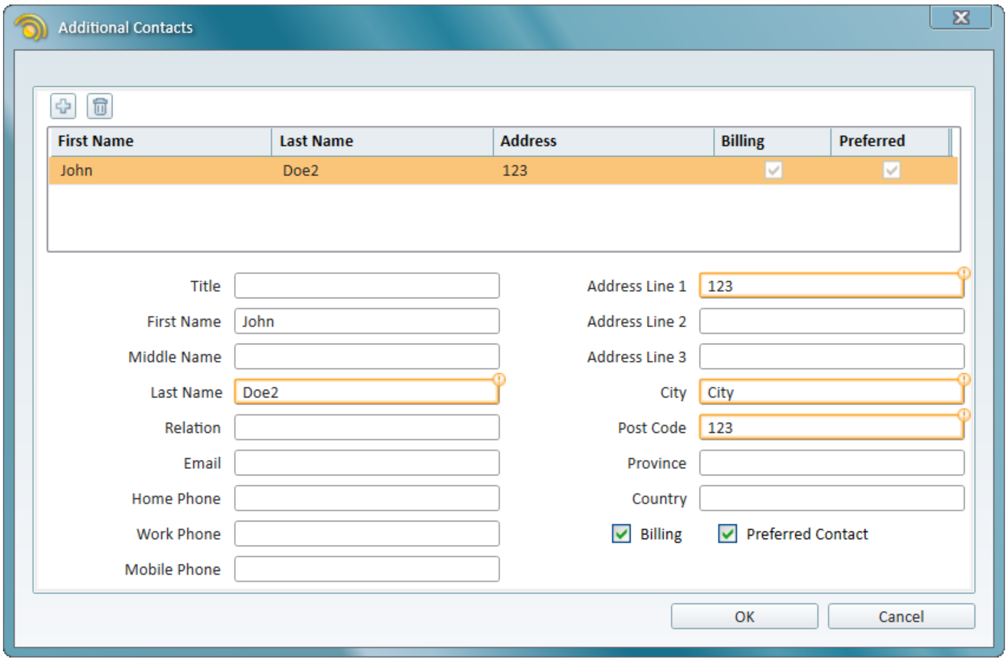
5.2 Additional Contact Details on Client

You can now add more contact details for the client - it can be the parent of a child, the caregiver for the elderly person etc. You can mark a contact as a preferred one for the client or set the contact as the client’s billing address.

Start editing the client and select ***Additional Contacts***.

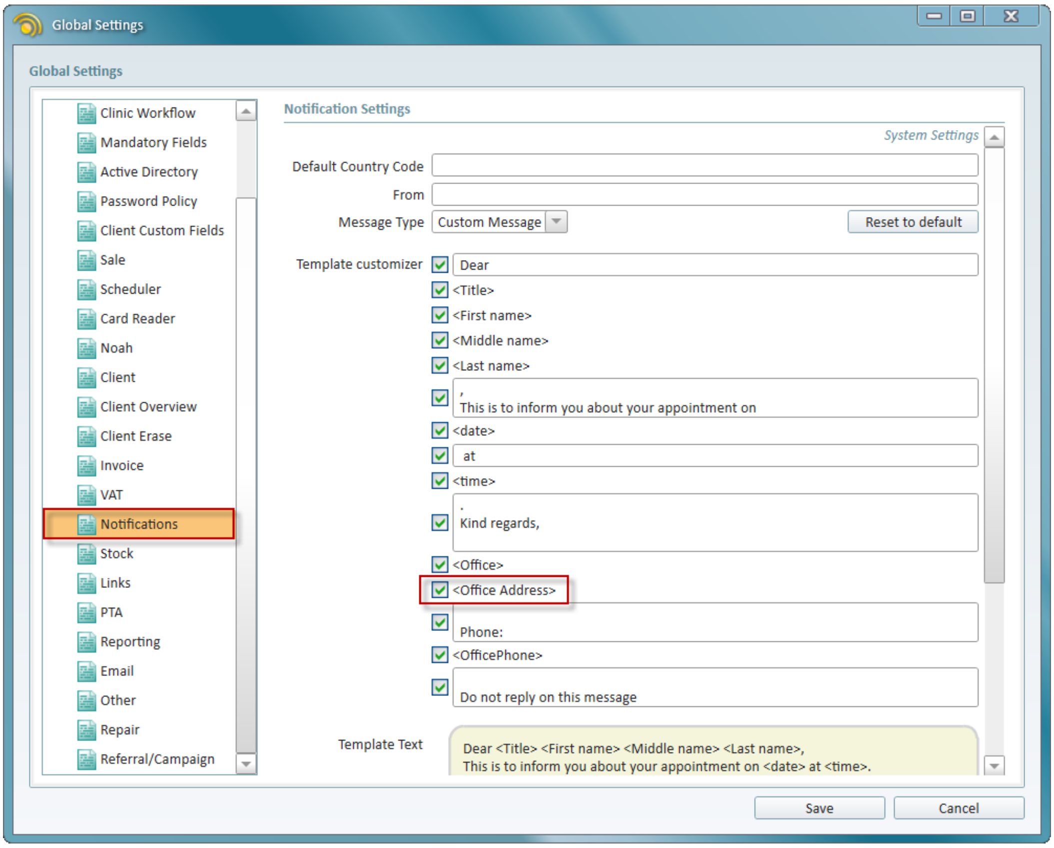


Next, you can add as many contacts as needed. You can set the contact as a billing or/and a preferred one, but you cannot have two or more preferred or billing contacts.



5.3 SMS Template

The SMS template now includes the **Office Address** – making client notifications even more informative.



6 Additional Information

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