What's New

Strato Version 2.3

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 2.3.

The available languages are English, Danish, Swedish, Norwegian, Spanish, Polish, and Chinese (Traditional). Strato v.2.3 is certified to NOAH 4 and works with Noah v.4.8.

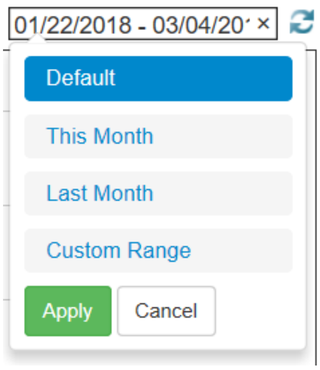
2 KPI Reports

2.1 KPI Reports overview

Strato now provides its customers with access to the warehouse database with data for statistical analysis and business analytics. We use this data to provide you with enhanced KPI reports split into two subcategories:

- **Appointments** - available for all customers
- **Sales** - available only for Pro customers

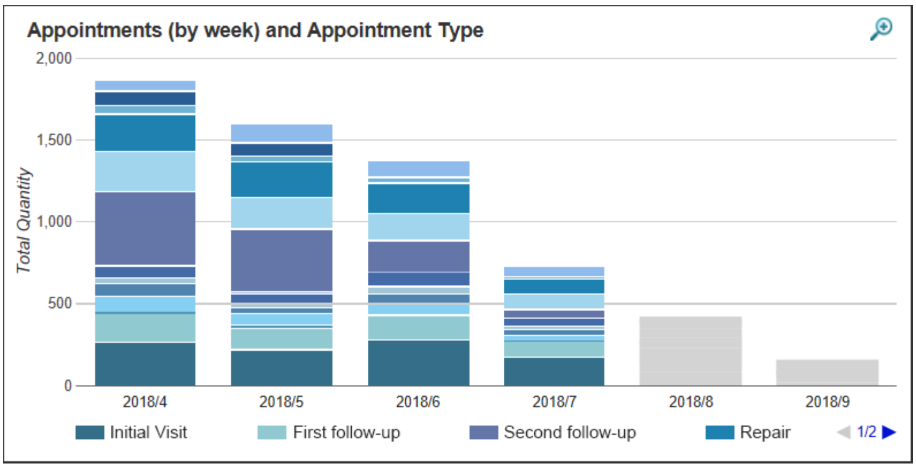
Open the **Dashboard** tab in the upper right corner to view weekly reports on appointments and sales. Default date range for the appointments is current week, 3 past weeks and 2 future weeks (future weeks displayed in grey). Default date range for the sales is current week, 3 past weeks, 2 future weeks. You can also display widgets for current and last month, or select your custom date range from the calendar.



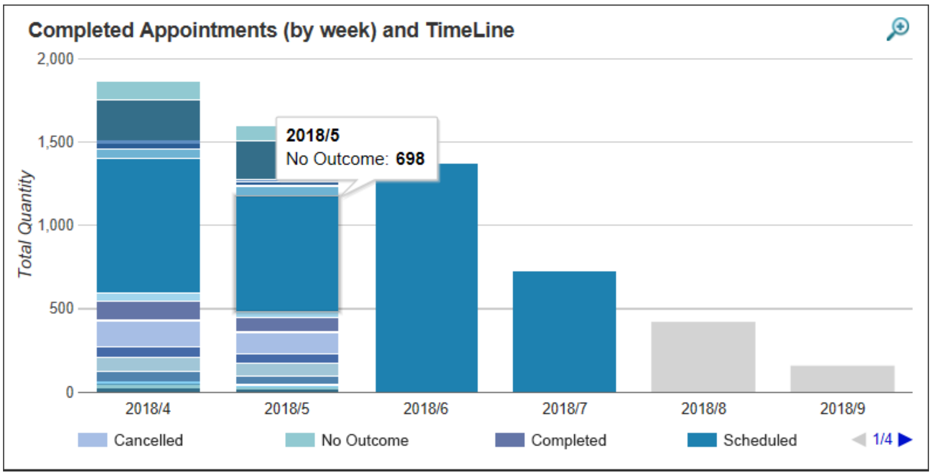
2.2 Appointments reports

Go to the **Appointments** tab to view:

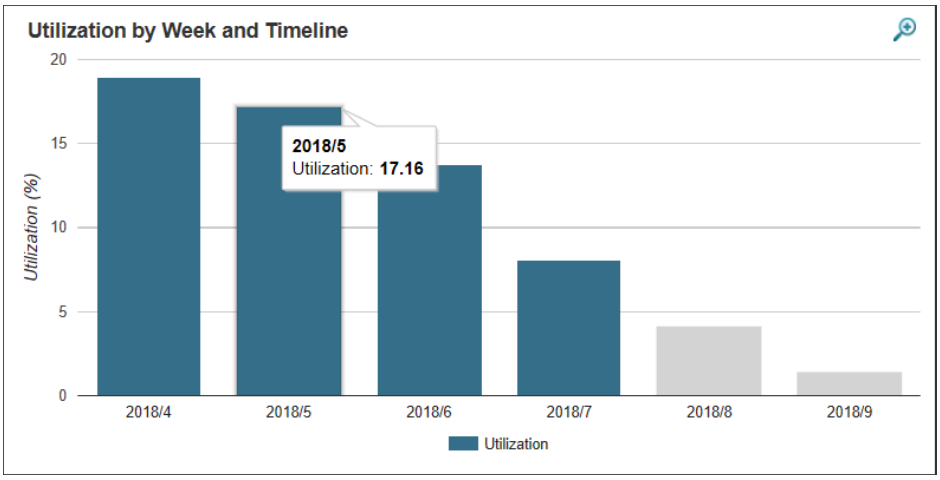
- Appointments (by week) and Appointment Type



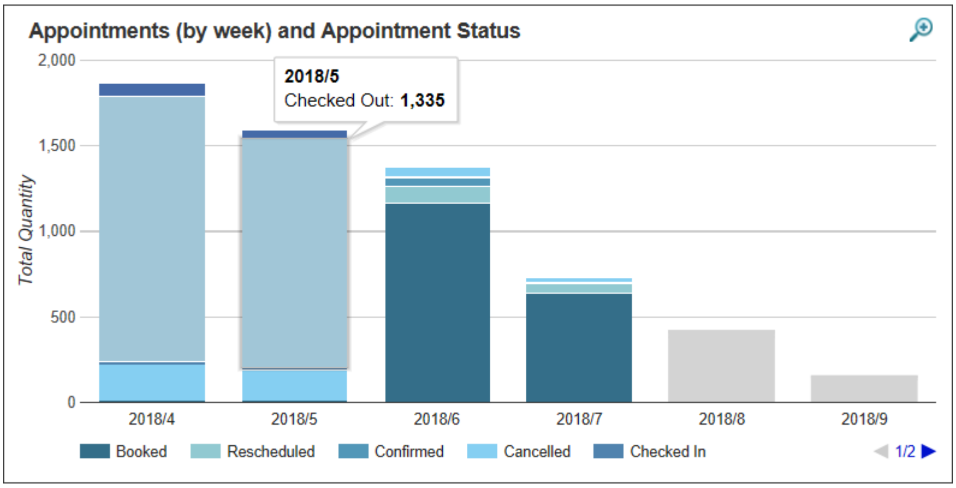
- Completed Appointments (by week) and TimeLine - split by appointments outcome



- Utilization by Week and Timeline - Appointments divided by the weekly amount of working hours. If you schedule activities during days with no working hours, such activities will be skipped during calculation. Formula - Appointments / (Work hours - activities in days with no working hours).



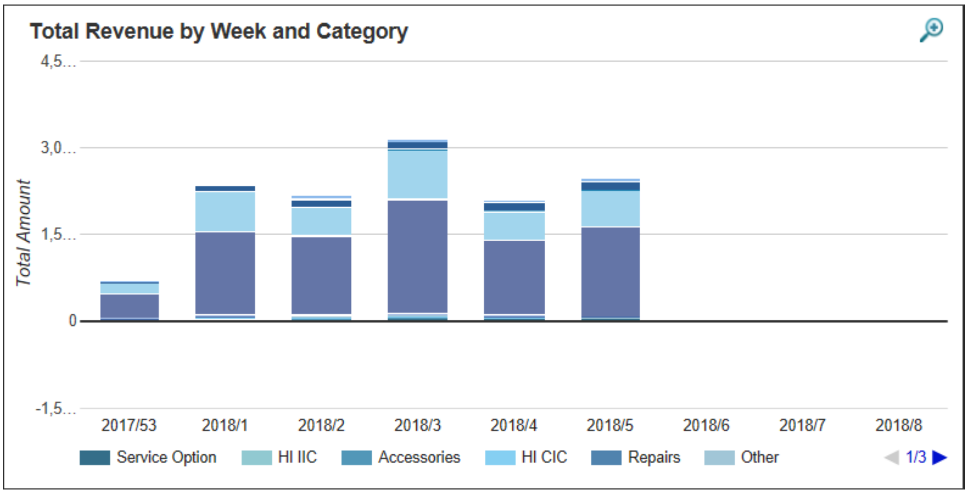
- Appointments (by week) and Appointment Status



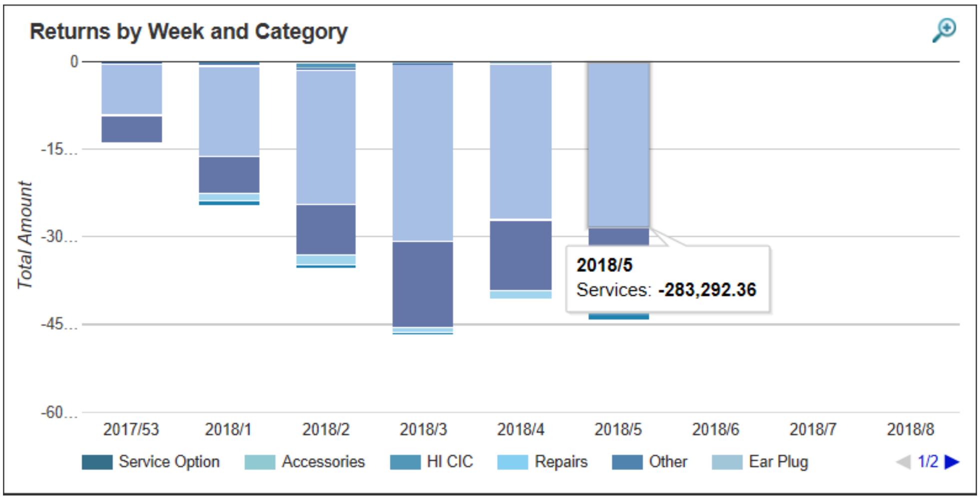
2.3 Sales reports

Click the **Sales** tab to get access to the sales reports. You can choose to display price and amount including VAT if you select the **Use VAT** check box. Specify your preferred date range and click **Apply** to view the following reports:

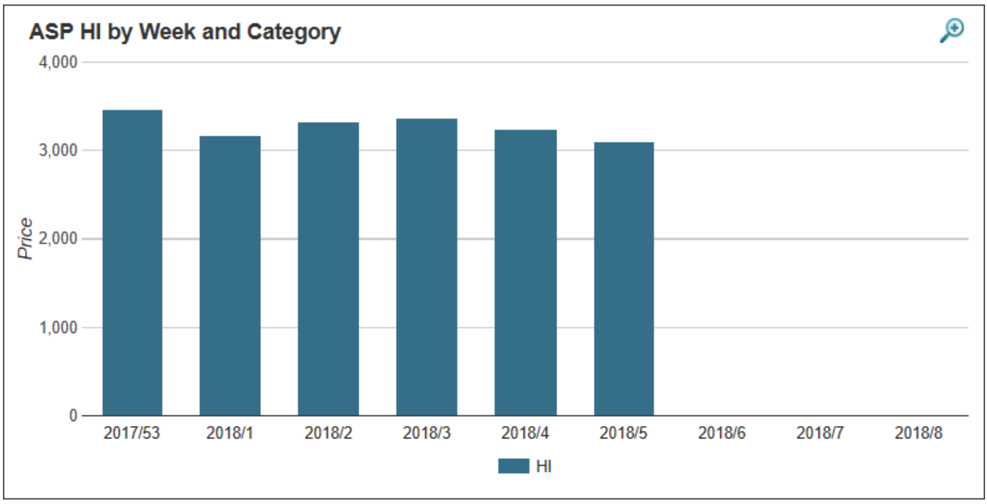
- Total Revenue by Week and Category



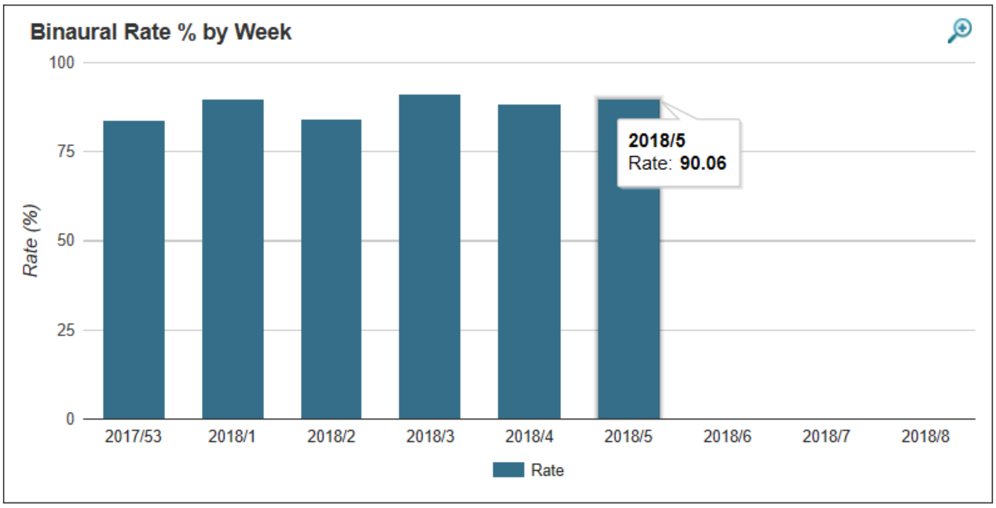
- Returns by Week and Category - cumulative value of returned goods and services (negative amount)



- ASP HI by Week and Category - average sales price of a hearing instrument split by week and HI's category

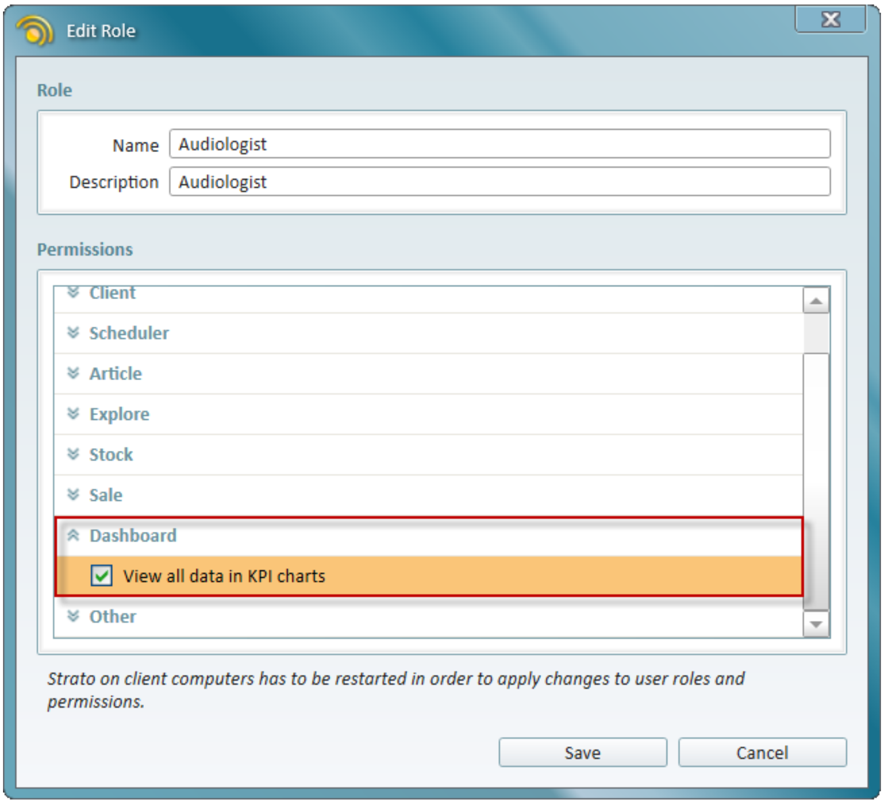


- Binaural Rate % by Week - percentage rate of the sold binaural hearing instruments



2.4 User permissions

Depending on the permissions set for the user role, users can see cumulative data for all the users across multiple offices or only for themselves. This permission can be set when editing the user role from **Tools -> Administration**.



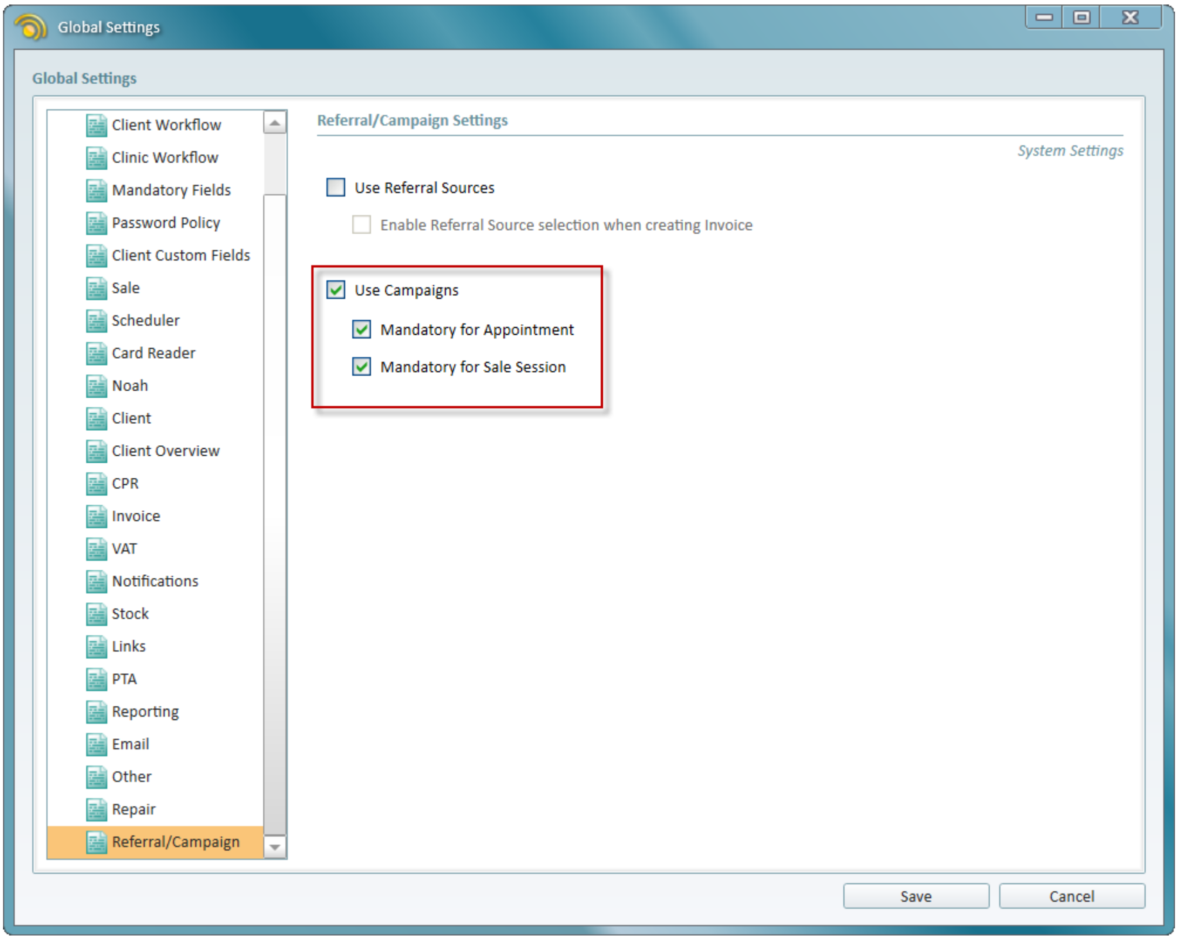
3 Promotional Campaign

3.1 Overview

Strato now includes promotional campaigns that can be created by the administrators to advertise the products to potential customers. You can create several campaigns and then add costs to them. Costs are money spent on a particular part of your campaign. For instance, you might create a promotional campaign for the city of Aarhus that would include costs spent on radio air time, printed booklets, and street billboards. When creating a sale or an appointment you can ask the client how they found out about your services and add the corresponding campaign to the sale/appointment. That helps you track which of your promotions are most effective.

3.2 Setting up Campaign functionality

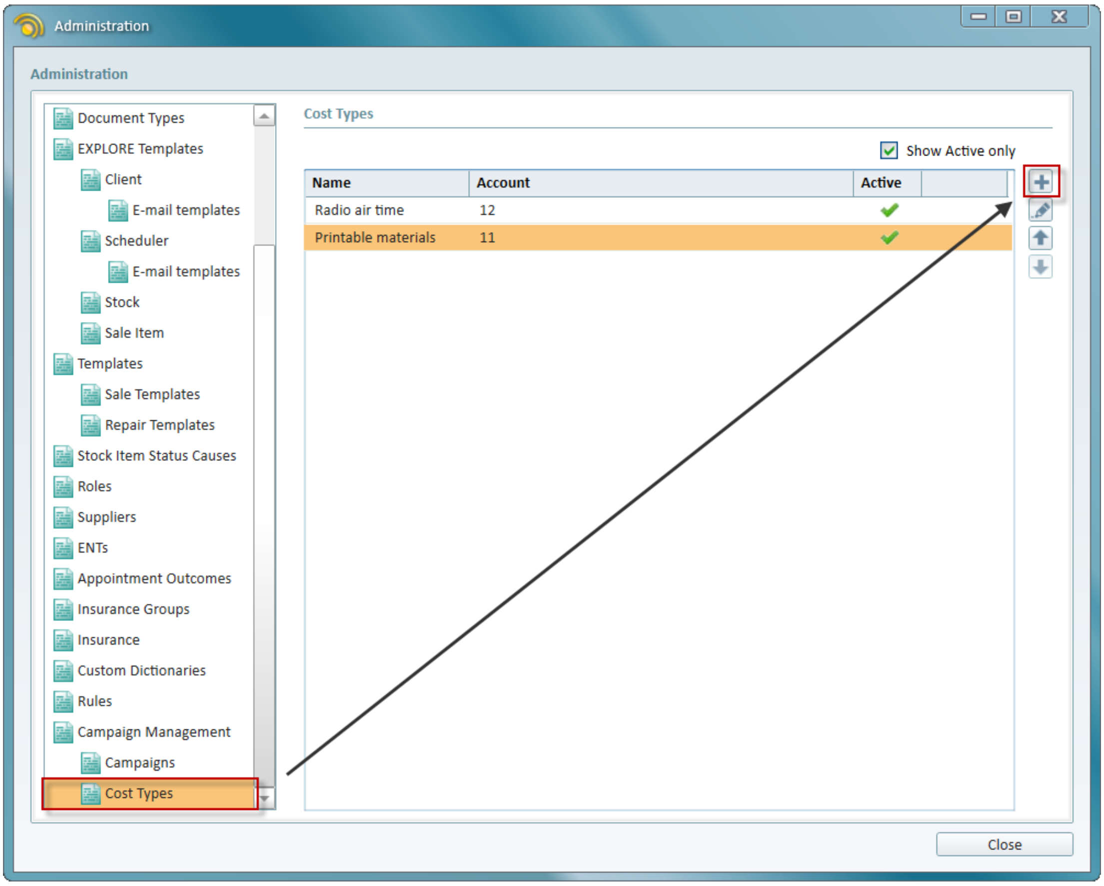
To enable campaigns, go to **Tools -> Global Settings** and select **Referral/Campaign**. Select **Use Campaigns** to turn it on. You can also make it mandatory to specify campaign when creating a new appointment or a new sale session.



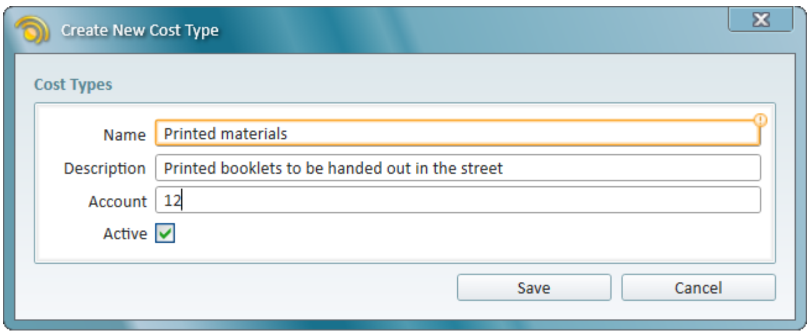
3.3 Creating a cost type

Let's first create cost types that we can add to our campaign. For this:

1. Go to **Tools -> Administration -> Campaign Management** and select **Cost Types**.
2. Next click the **Add New** button to create a new cost type.



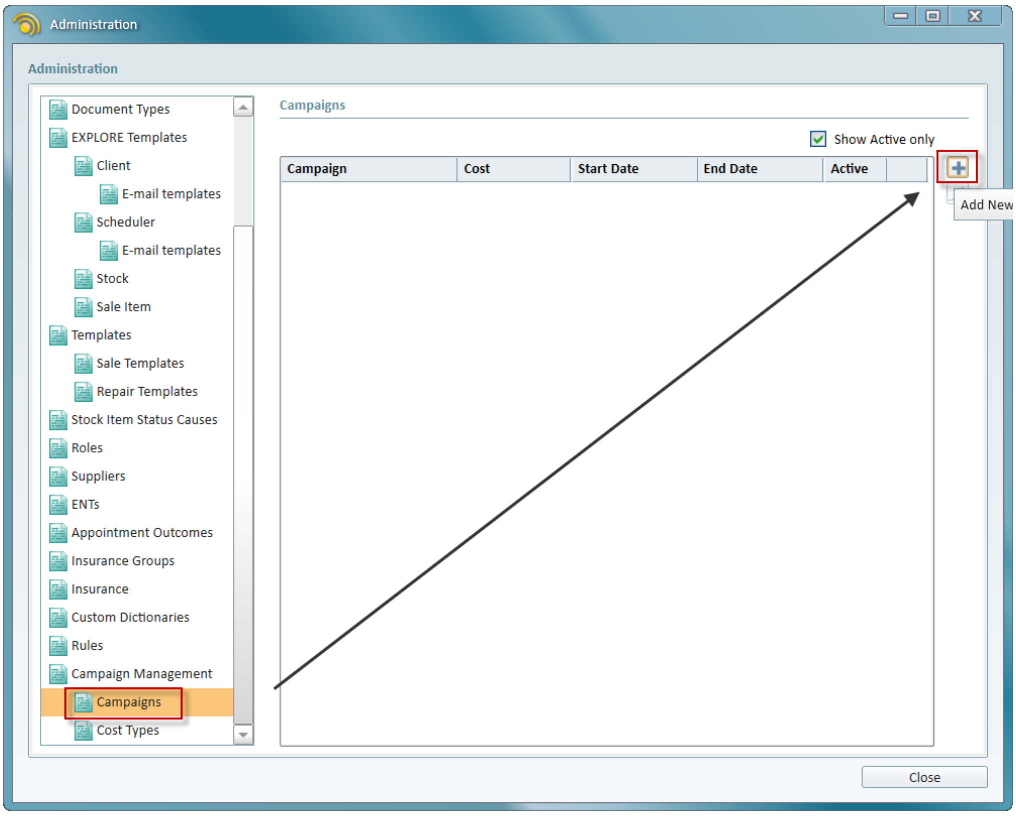
3. Then enter the cost type's title, description and specify the account for financial statement. Click **Save** afterwards.



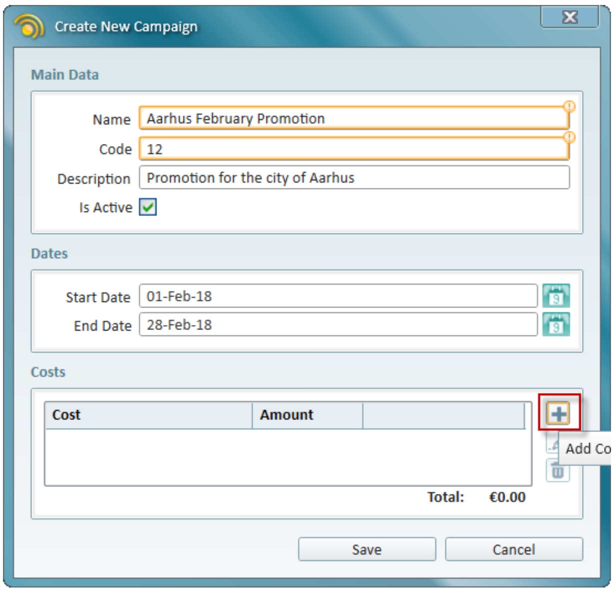
3.4 Creating a campaign

Now add your campaign:

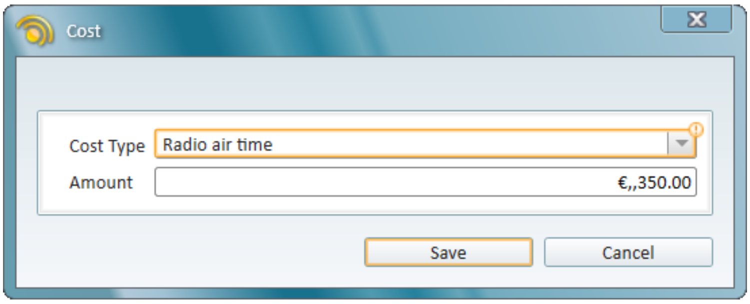
1. Go to the **Campaigns** tab and click **Add New**.



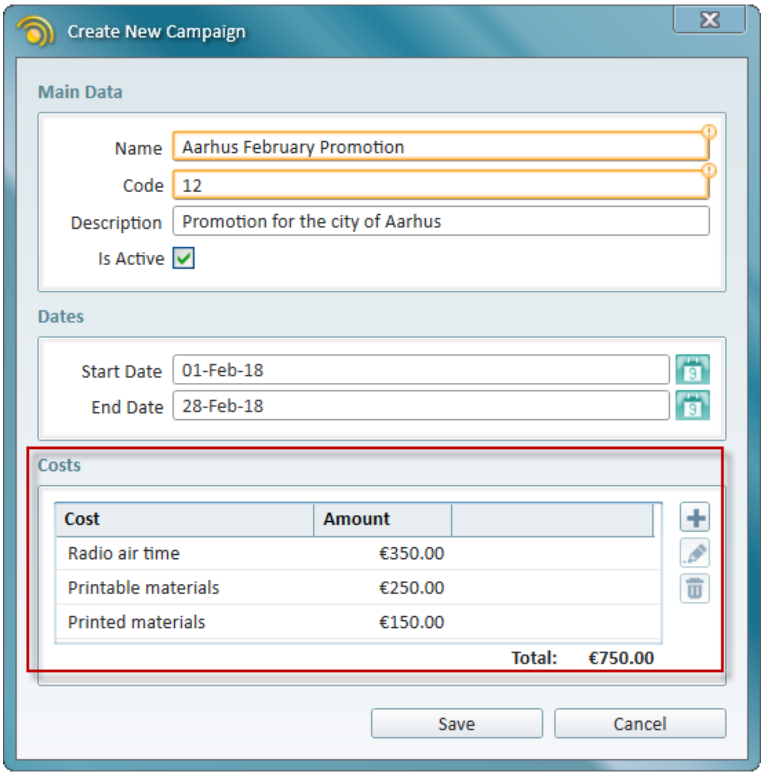
2. Provide campaign details and then click **Add Cost**.



3. Select one of the available cost types and specify its amount.



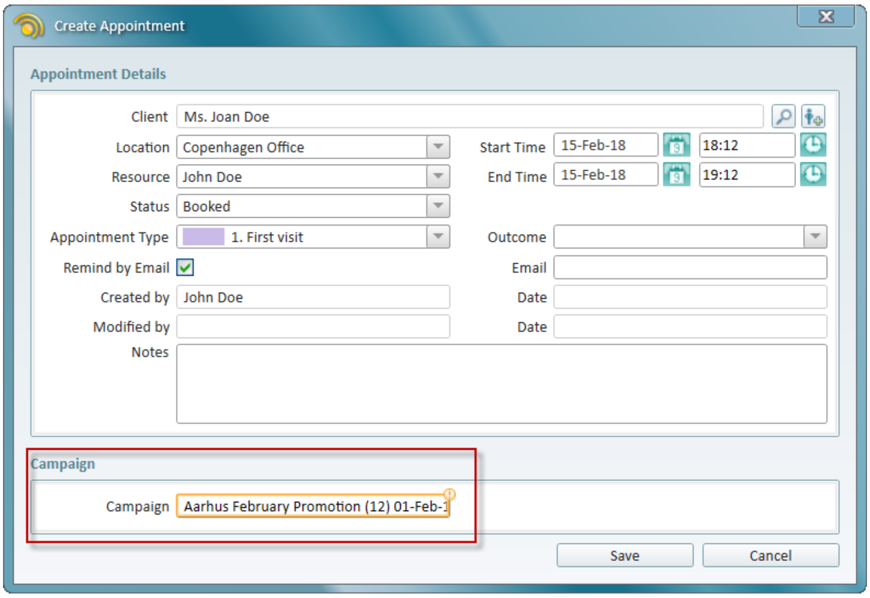
4. Your campaign will include all added costs with the total campaign cost displayed below.



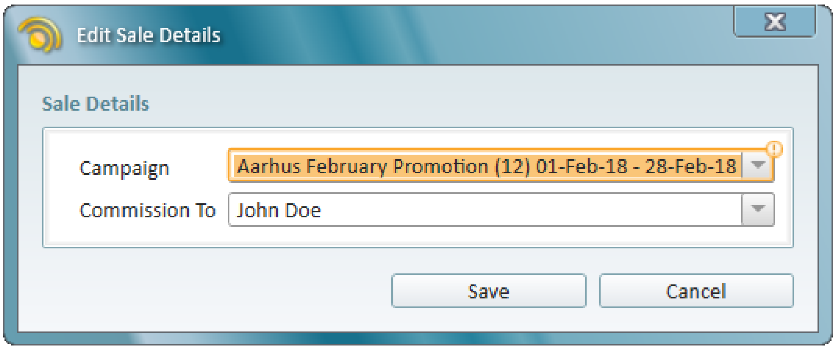
5. Save the campaign to complete the procedure.

3.5 Adding campaign when creating appointments or sale sessions

Now as you add the new appointment, you need to specify campaign that prompted the customer to schedule the visit to your clinic.



When creating a new sale, you will also need to provide the promotional campaign that led to the sale.

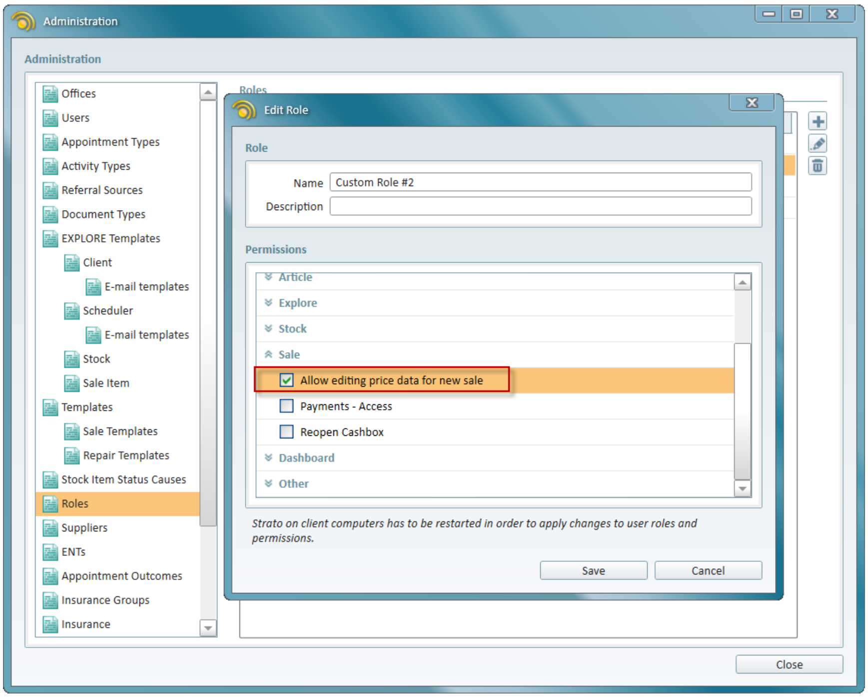


4 Sale Tab

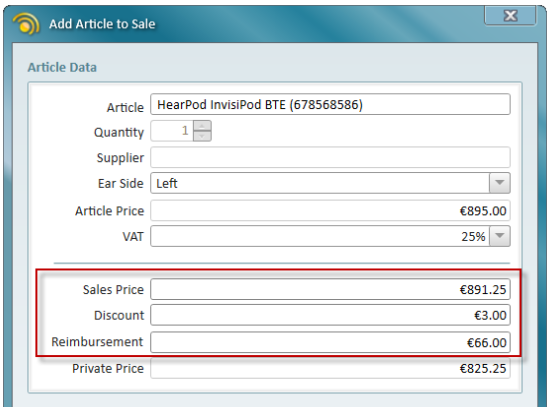
4.1 Ability to edit price data for new sale

We have added the new role permission that regulates the right to change the price when starting a new sale. To apply the permission:

1. Go to **Tools -> Administration** and click the **Roles** tab on the left.
2. When editing the role, open the **Sale** permission and select the **Allow editing price data for new sale** option.



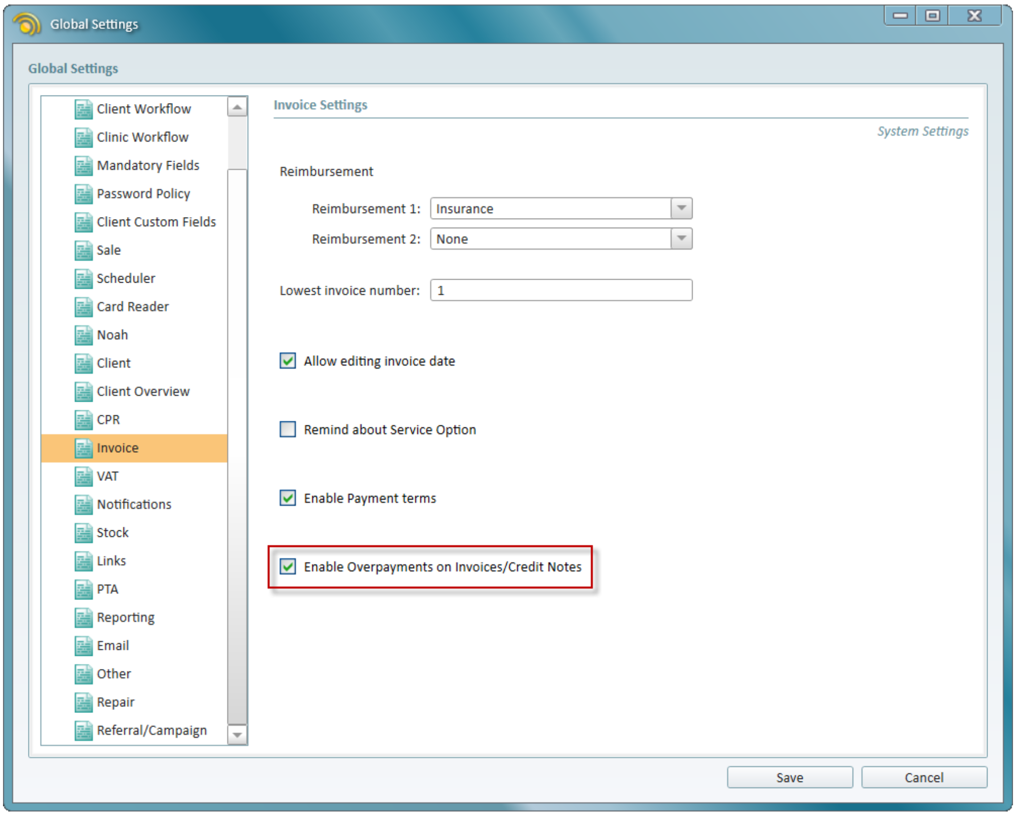
Users assigned to this role can now edit the article price when creating the new sale. They would also be able to change the discount and reimbursement amounts. If permission is not granted, these fields remain read-only.



4.2 Overpayments on Invoices and Credit Notes

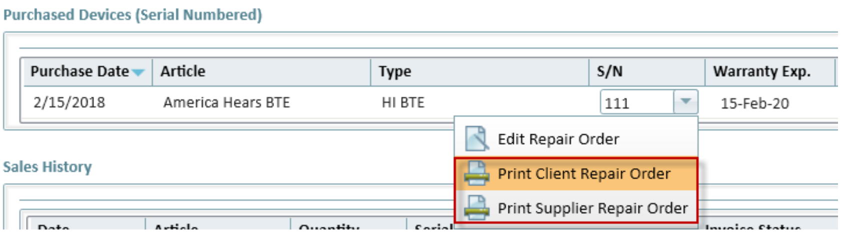
You can now register multiple payments for a single invoice/credit note. This is useful if more than one payment has been made by mistake. Until you sort out how to refund the duplicate, you need to let Strato know which invoice this payment belongs to. To enable this option:

1. Go to **Tools -> Global Settings**.
2. Click the **Invoice** tab and there check the **Enable Overpayments on Invoices/Credit Notes** option.



4.3 Print repair orders from the Sales History tab

After creating a repair order, go to the **Sales History** tab and click the order's serial number. You can now print both client and supplier repair orders from here.



4.4 Discount is applied to price without VAT

We have changed the logic when applying discounts to the price that includes VAT. In this case Strato:

1. Calculates the base article price without VAT.
2. Applies discount to the base price.
3. Applies VAT to the base price with discount.

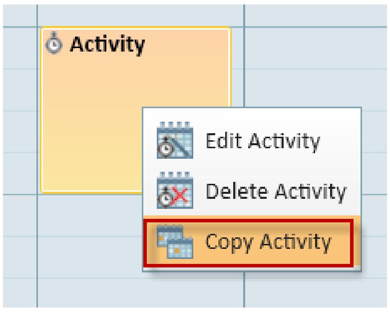
5 Other Improvements

5.1 More client custom fields

We have increased the number of client custom fields in Strato from 10 to 20.

5.2 Copy activities in Scheduler

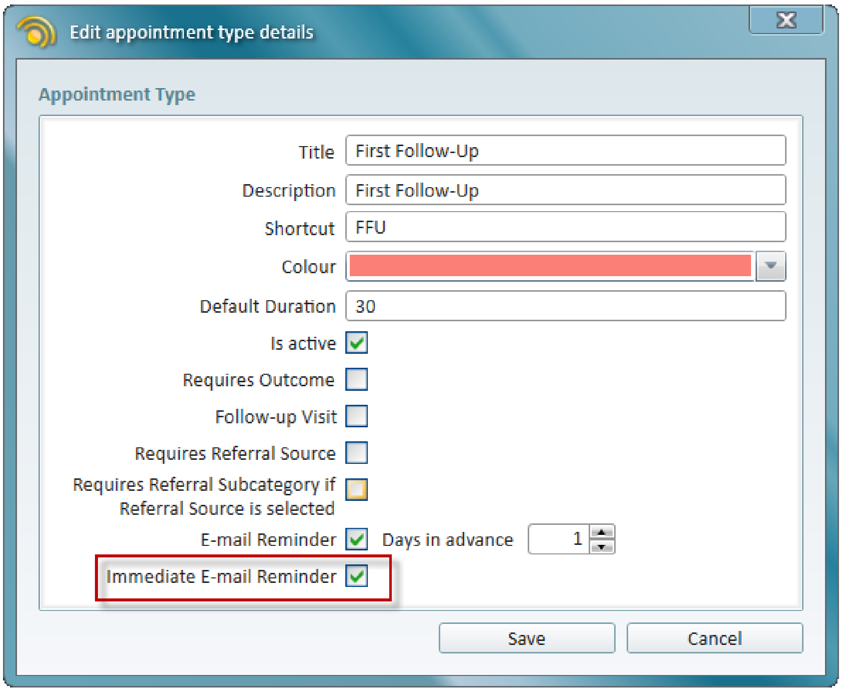
You can easily copy an activity by right clicking it in the Scheduler and selecting the corresponding option.



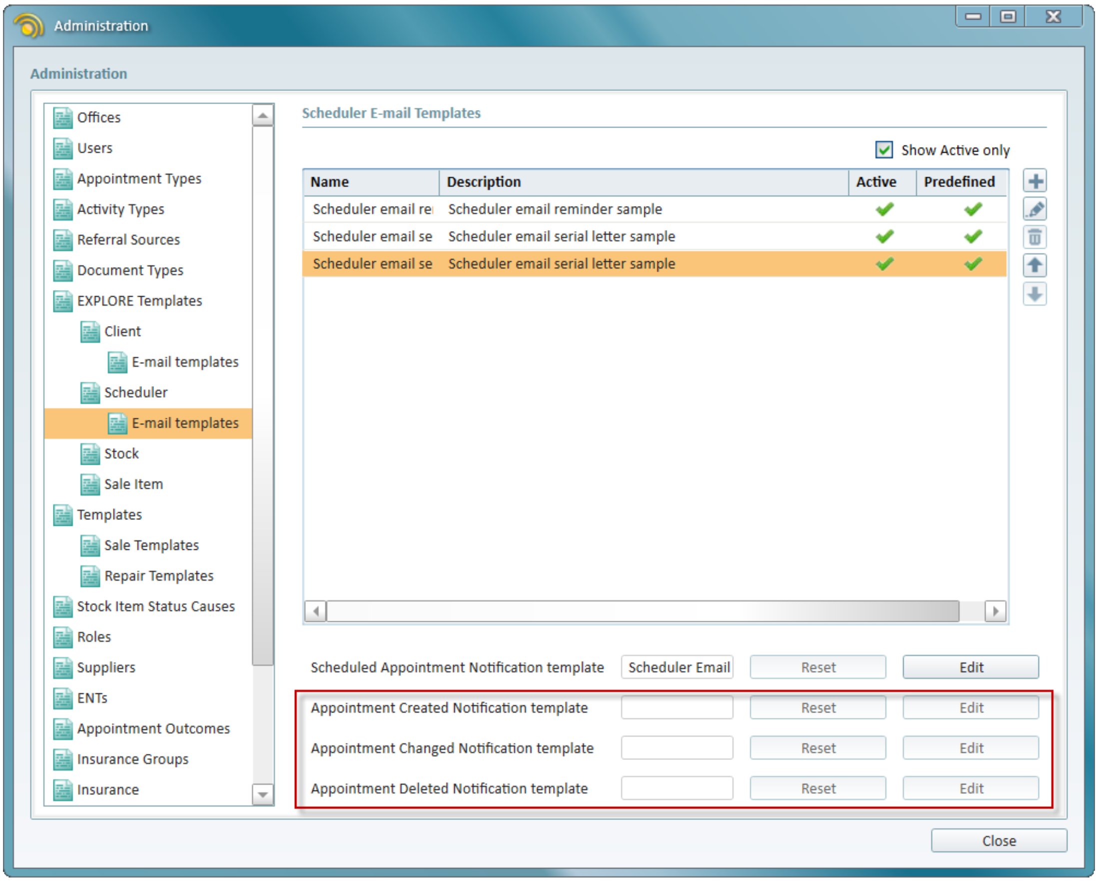
5.3 Immediate email notifications

Now you can enable additional email notifications per appointment type. Start editing appointment details and then select the **Immediate E-mail Reminder** check box. The patient will receive emails when:

- Appointment is created
- Appointment details changed (place, date, time, patient's email)
- Appointment is deleted, canceled, or rescheduled



These emails include the corresponding Strato templates found under **Tools -> Administration -> EXPLORE Templates -> Scheduler -> E-mail templates**.



When creating a new appointment in Scheduler you can always skip email notifications if you deactivate the **Remind by Email** option.

5.4 Added created date to appointment details

Appointment details in Scheduler now also include the date when appointment was created.

5.5 Ability to filter payments by payment method

You can now use payment method as a search filter in the Payment EXPLORE view.

5.6 Fixed article purchase price

Article purchase price at the moment of invoice creation remains fixed. It will be used in the Power BI reports and during ERP operations. This fixed price is displayed in the Sale Item EXPLORE.

6 Additional Information

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