Getting Started

Document Version: DN200231/03







1 STRATO OVERVIEW	
2 INSTALLATION	
2.1 System Requirements	
2.2 Installation Procedure	5
3 GETTING STARTED	
3.1 Creating Offices	
3.2 Adding Users	
3.3 Managing Appointment Types	
3.4 Creating Referral Sources	
3.5 Creating a New Client	
3.6 Adding Activities	
3.7 Adding Appointments	

1 STRATO OVERVIEW

Strato is an online Office Management System designed specifically for hearing clinics and hearing aid dispensers/shops.

The system is fully integrated with NOAH enabling you to handle all your clinic tasks – appointments, measurements, fittings, journals, follow-ups and repair/service – from a single workplace.

Its key advantages are as follows:

- Ease of use the interface and menus are intuitive and user-friendly, and it takes a short amount of time for a user to familiarize with the system.
- Strato is a fully cloud-based application available 24/7 from any location, with data protection, security, backup and system updates automatically taken care of. You log in, do your work and log off again.
- Your data appointments, audiograms, fitting data, journals and such are regularly updated and can be accessible from any location at any time.

This document will guide you through the installation and initial configuration of Strato and ensure that you can start using the system immediately.



2 INSTALLATION

Prior to starting the installation process, ensure that your computer meets or exceeds the minimum system requirements.

2.1 System Requirements

Processor	Processor/Clock speed: 2 GHz (or higher)
System RAM	2 GB (4 GB recommended)
Free hard drive space	1 GB free for Strato and 1 GB free for every Noah module (audiometric equipment, fitting software, REM/HIT software)
Operating System*	Microsoft Windows 8 (not Windows RT), Microsoft Windows 10
Screen Resolution	1280x960 (or higher)
Network	Internet connection min. 0,5 Mbit/s
Noah	Strato is compatible with Noah v4.12
Noah License	Noah 4 Engine license is needed for using Noah modules in Strato

*Your OS must be up to date. All Windows updates must be installed.

Noah Licensing

Strato is fully integrated with the Noah system, and can run a variety of Noah fitting and measurement modules.

For more information about Noah, visit the **HIMSA** website.

- If you intend to use Strato along with Noah, version Noah 4.12.0 (build 4882) or later of Noah is required.
- If you have not obtained and installed a Noah 4 license, Noah will cease to operate after 45 days.

To check Noah version and license information, go to the Strato **Help** > **About** and then click **Noah License**.

You can purchase the license from Auditdata. This will help ensure that you receive the best Noah support possible. Contact **Auditdata** for more information.

There can be problems if a different Noah license was previously installed on the computer. To handle this situation, Auditdata can provide a Noah 4 demo license.

The procedure for registering and installing a Noah 4 license can be found in the Noah 4 Knowledgebase on the HIMSA website.

2.2 Installation Procedure

- 1. Download Strato from here: http://stratoupdate.auditdata.com/updates/setup/Strato.exe
- 2. Run the Strato **.exe** file Strato.exe and select the folder to extract the installation files:

line and the second sec	×
Do you want to install the Strato? Extract installation to:	
C:\Users\user1\Desktop\Strato Installation	
OK Cancel	
Extracting 18%	
5	
Cancel	

3. After extraction the Setup program will check whether Noah 4 is installed on your computer.
Please note that Noah installation is an optional setting for Strato.

😵 Strato Setup	×
The following components will be installed on your machine:	
Strato Check Tool NOAH 4 (optional)	
Do you wish to install these components?	
If you choose Cancel, setup will exit.	
Install Cancel	

😵 Strato Setup	×
Installing NOAH 4 (optional)	
 Strato Setup 	×
Noah 4 installation options	۱
 ✓ Install Noah 4 ✓ Install Noah 4 basic modules 	
	Install Abort

- 4. The installation wizard will now guide you through the installation procedure.
 - Follow the instructions on the screen.

🔀 Strato Office Management	System Setup	_		×
	Welcome to the Strato Of Management System Setu	fice Ip Wiz	ard	
	The Setup Wizard will install Strato O System on your computer. Click Next to exit the Setup Wizard.	fice Man to contin	agement nue or Car	ıcel
	Back Nex	t	Cano	cel

😥 Strato Office Management System Setup 🦳 🗌	\times
End-User License Agreement Please read the following license agreement carefully	0
Strato TERMS AND CONDITIONS	^
THIS LEGAL AGREEMENT BETWEEN YOU AND Auditdata GOVERNS YOUR USE OF THE Strato PRODUCT, SOFTWARE, SERVICES, AND WEBSITES (COLLECTIVELY REFERRED TO AS THE "SERVICE"). IT IS IMPORTANT THAT YOU READ AND UNDERSTAND THE FOLLOWING TERMS. BY CLICKING "AGREE," YOU ARE AGREEING THAT THESE TERMS WILL APPLY IF YOU CHOOSE TO ACCESS OR USE THE SERVICE.	~
I accept the terms in the License Agreement Print Back Next Can	cel

🕼 Strato Office Management System Setup 🛛 —		×
Destination Folder Click Next to install to the default folder or click Change to choose another.		0
Install Strato Office Management System to:		
C:\Program Files (x86)\AuditData AS\ Change]
Back Next	Cano	cel



🙀 Strato Office Management System Setup	_		×
Installing Strato Office Management System			•
Please wait while the Setup Wizard installs Strato Office Management	: System.		
Status: Copying new files			
Back Nex	t	Cano	el



5. The installation is now finished. Double-click the shortcut on your desktop to run Strato.

	×
🕤 Strato	
Login admin	
Password •••••	
ОК	
	auditdata

- 6. Use **admin** as a login name and enter the password you received in the email.
 - You will be asked to change this password the first time you log into Strato.

3 GETTING STARTED

When you have completed the software installation, you can begin to familiarize yourself with the system, and customise it to your preferred work settings.

Only users with administrator rights can make changes to Configuration settings.

3.1 Creating Offices

Once you logged into the system and changed the password, the first thing you need to do is to create an office. To do this:

1. Select Tools > Configuration > System > Offices and click the ADD (+) button on the right-hand



System	- Onices				
Active Directory	Filter			Show	Active only
Business Units	Office Name	City	Phone	Address	Active
Campaigns					
Campaign Cost Types					
Card Reader					
Client Workflow					
Clinic Workflow					
Country and Region					
Custom Dictionaries					
Explores					
Links					
Offices					
Other					
Password Policy					
Referral/Campaigns					
Password Policy					

- 2. Fill in the information that you consider important and indicate the working hours. Then click **Save**.
 - The fields outlined in **yellow** are required.

fice Data							
Inc. Data			0				
Office Name	Office		A	ddress Line1			
Phone			A	ddress Line2			
Email			A	ddress Line3			
Is active	Yes		-	City			
Business Unit	Organizati	ion	-	Postcode			
Notes							
orking Hours							
Day of the	week	From		То		Closed	
	Monday	9:00 AM	5	5:00 PM	5		
	Tuesday	9:00 AM	5		5		
We	dnesday		5	12:00 AM	1:00 AM	2:00 AM	3:00 A
Т	hursday		5	4:00 AM	5:00 AM	6:00 AM	7:00 A
	Friday		5	8:00 AM	9:00 AM	10:00 AM	11:00 A
s	Saturday			12:00 PM	1:00 PM	2:00 PM	3:00 P
	Sunday	12:00 PM		4:00 PM	5:00 PM	6:00 PM	7:00 P
	Sunday	12.0011		8:00 PM	9:00 PM	10:00 PM	11:00 P
ffice Resources							
					Sh	ow Active o	nly
Name		Is Active			0.03		

- 3. Create as many offices as you want repeating the above steps.
 - There may be a limitation applied via the **Maximum number of offices** setting in the Back-office.

3.2 Adding Users

After you create offices, the next step is to add users and assign them different permissions. Thus you may allow one user to have all admin rights, while limiting access rights for other users.

To add a user:

1. Select Tools > Configuration > System > Users



2. Click the ADD (+) button on the right-hand side of the window to open the **Create New User** dialog.

System Active Directory Business Units Campaigns Campaign Cost Types Card Reader Clinic Workflow Clinic Workflow Country and Region Custom Dictionaries Explores Dinks Other Password Policy Referral/Campaigns Referral Sources Roles Points	Configuration							X
Referral Sources	Configuration System Active Directory Active Directory Campaigns Campaign Cost Types Card Reader Client Workflow Clinic Workflow Clin	Users Filter admin	First Name	Last Name] _ Sha Is \$	w erased users [Role Admin Role	Show Active only Business U Organization	
Rules Rules	Referrai Sources							

- 3. Fill in the fields that you consider important, such as account and personal data.
 - In the **Scheduler** section, define User availability for activities and appointments as well as available appointment types for a User.
 - In the Assigned Offices section, if required add working hours for the said User.

Sreate New User		X					
Account Data							
Login	admin1						
Password	••••						
Confirm Password	****						
Role	Admin Role	-					
	Strato on client computers has to be restarted in order to apply changes to user roles.						
User Status	Active	-					
Business Unit	Organization	-					
Scheduler							
Is Available Fo	r Activities 🔽						
Is Available For App	ointments V						
Available Appointin	icir i Ahes						
Personal Data							
User Initials	adm1						
First Name	Admin1	51					
Last Name	Admin1	51					
Mobile Phone	[51					
Phone		51					
Fmail		51					
Sign	[$\exists \Box$					
Licer ID		$\exists \Box$					
Notes		$\exists \Box$					
Assigned Offices							
Office		1					
Office 10							
Office 22							
Office 25							
Office 30							
Office 8546							
		-					
	Working hour	s					
	Save Cancel						

To add Working hours:

- Select the Office to be assigned
- Click the corresponding button Working hours
- In the Edit User Working Hours window, select the working hours for the User

S Edit User Working Hours							X
Working Hours							
Day Of Week	Fre	om	т	o	Day Off	Office	
Sunday	00:00	•	00:00	•	\checkmark	Office	-
Monday	08:00	•	17:00	•		Office	-
Tuesday	08:00	Ð	17:00	Ð		Office	-
Wednesday	08:00	Ð	17:00	•		Office	-
Thursday	08:00	•	17:00	•		Office	-
Friday	08:00	Ð	17:00	•		Office	-
Saturday	09:00	Ð	15:00	Ð		Office	Ŧ
<u>.</u>				Save		Cance	

4. Click Save.

• The newly added user should now appear in the list.

Business Units	Users					
Campaigns	Filter			Sho	ow erased users	Show Active only
Campaign Cost Types	Login	First Name	Last Name	ls	Role	Business U
Card Reader	admin	Admin	Admin	~	Admin Role	Organization
Client Workflow	admin1	Admin	Admin	1	Admin Role	Organization
Clinic Workflow						
Country and Region						
Custom Dictionaries						
Explores						
Links						
Offices						
🔛 Other						
Password Policy						
Referral/Campaigns						
Referral Sources						

To create a user role:

 Select Tools > Configuration > System > Roles and click the ADD (+) button on the righthand side. 2. In the **Create New Role** dialog, give a name to the role and activate the permissions by enabling the check-boxes in every section.

S Create New F	Role	3
Role		
Name Description	End user Normal user	P
Permissions		
	ation	
🖌 Арро	pintment Outcome - Manage	
Appo	pintment/Activity Types - Manage	
Articl	le Categories - Manage	
Articl	le Types - Manage	
Busin	ness Units Management	
Camp	paign Management	
Custo	om Dictionary Management	
🔽 Docu	ument Types - Manage	
Strato on client permissions.	t computers has to be restarted in order to apply changes to user roles and	
	Save Cancel	

3. Click Save. A new role with the selected permissions is added to the list.

3.3 Managing Appointment Types

After you created offices and users, it might be important to add appointment types.

To add an appointment type:

1. Select **Tools > Configuration > Scheduler > Appointment types** and click the ADD (+) button on the right-hand side to add a new appointment.

Configuration								X
Configuration								
P Scheduler		Appointment Types						
Activity Types					Sho	ow Active	only	
Appointment Outcomes		Title	Description	Shortcut	Default Duration	Colour	A	÷
Appointment Types		Initial visit	Initial visit of client (only email notif)	Initial	60			
Notifications		Second follow-up	Second follow-up (only sms)	Second	30			1
Giffice Resource Types		First follow-up	First follow-up (sms+email)	First	60			•
Conline Booking		Repair	Repair equipment visit	Repair	30			
Scheduler Settings	_	First fitting	fitting for hearing aids	FF	30			
📄 Sales, Repairs and Orders								

 In the Create New Appointment type dialog, fill in the required fields (outlined in orange), select the color and enable other options (if applicable). Click Save. Your appointment type is now added to the list.

Create New Appointment Type	X
Appointment Type	
Title	Final visit
Description	No more visits needed
Shortcut	Final
Colour	· · · · · · · · · · · · · · · · · · ·
Default Duration	30
Mandatory Resource Types	
Requires Outcome	
Is active	
Follow-up Visit	
Requires Referral Source	\checkmark
Requires Referral Subcategory if Referral Source is selected	
Available for Online Booking	
Appointment Type Outcomes	
Outcome	
	
	Save Cancel

- 3. To modify an existing appointment type, select the appointment type you want to change and click the pencil icon () in the right-hand side.
- 4. Use the UP (1) and DOWN (1) arrows to change the position of the appointments in the list.

3.4 Creating Referral Sources

You may create as many referral sources as you want and add subcategories for them.

To create a new referral source:

 Select Tools > Configuration > System > Referral Source and click the ADD (
 button on the righthand side.

System 2	Referral Sources		
Active Directory			Show Active only
Business Units	Name	Active	
Campaigns			
Campaign Cost Types			
Card Reader			
Client Workflow			
Clinic Workflow			
Country and Region			
Custom Dictionaries			
Explores			
Links			
Grifices			
Other			
Password Policy			
Referral/Campaigns			
Referral Sources			
Roles			
Rules			
Users			
Scheduler			
Activity Types			
Activity Types			

2. In the dialog that opens, enter the title for a new referral source and select whether to make it Active. Optionally, add the required *Usage Areas* and click **Save**.

Create Referral Source	X
Referral Source	
Name News	ĵ
✓ Is active	
Usage Areas	
Use in Create (Edit) Client dialog	
Reference existing client	
Use in Appointment dialog	
Use in Invoice creation dialog	
Save	Cancel
Save	Cancel

3. To create a referral subcategory, click the icon 📆, enter the title and save the subcategory. The referral source with the subcategory will look as follows:

S Configuration		
Configuration		
P System	Referral Sources	
Active Directory		Show Active only
Business Units	Name	Active
Campaigns		✓
Campaign Cost Types	News 1	✓
Card Reader		1
Client Workflow		•
Clinic Workflow		
Country and Region		
Custom Dictionaries		
Explores		
Links		
Offices		
Other		
Password Policy		
Referral/Campaigns	2	
Referral Sources		
Roles		
Rules		
Users		

- 4. To modify either referral source or its subcategory, select the source/subcategory you want to change and click the pencil () icon in the right-hand side.
- 5. Use the UP (\frown) and DOWN (\bigcirc) arrows to change the position of the source in the list.

3.5 Creating a New Client

To create a new client:

1. Choose Create Client from the Client menu.



2. The **Create Client** dialog window opens. Fill out the information about a client and then click **Save**.

6	Create Client			X
1	Personal Data			
	Main Personal Inform	nation	Address	
	Gender	Male	Address Line 1	
	Title	Mr	Address Line 2	
	First Name	FirstName	Address Line 3	
	Middle Name		City	
	Last Name	LastName	Post Code	
	Date of Birth	04/03/1988	Province	
	SS Number	04/03/1500	Country	
	SS Number		Clinet Distance	
	Occupation		Client Picture	Browse
		Patient Alerts	Billing Person	Add Billing Person
		Add Cor	nment	
	Contact Information			
	Additional Contacts			
	Email	first_name@gmail.com	Work Phone	+3507070712
	Home Phone		Mobile Phone	
l				
1	Insurance			
	Group		Insurance	
	Group		Insurance Delice	
			Insurance Policy	
I	Primary Assignments			
	Office	Office	Acoustician	· · · · ·
	Physician			
	Physician / G.P.		ENT	•
I	Referral			
	Referral Source		Referral	
	Subcategory		Nenerral	
	NOAH Deferred			
	NUAR REFERTAL			
	Custom Fields			
	Type of Hearing Loss		Suggested Treatment	•
-	Other Data			
	Other 1		Creation Date	17/05/2020
	Other 2		Client Number	
	Created by		Client Status	Client
	created by		ciient status	
				Save Cancel

3. The **Client Screen** for the newly-created client will be opened.

🕥 Auditdata Strato		Mr FirstName LastN ×	Scheduler	Clinic Tasl	s	Dashboard			I X
File Client Scheduler Cashbox E	XPLORE Tools Help								
🚯 🚄 🥌 🧱 🐻 🖻 🔝						Curren	t Office: Aud	liometry 1	~
Mr FirstName Last	Session History		No	Data					SEARCH &
Initial Visit	Client Data			Payment balance			FI	RONT PAGE	S LIST &
PT Audiogram	Mr FirstName LastNam Born 04/03/1988 (32 y Primary: Office: 0	ne (Client) Jears old)		Client's balanc Deposi From clien To clien	e €0.00 t €0.00 t €0.00 t €0.00				TASK
New Sale item	Other Data: Client Nu	mber: 2501480		From insuranc To insuranc From insurance grou To insurance grou	e €0.00 e €0.00 p €0.00 p €0.00				
Fitting REM	Pure Tone			Last delivered HI			1		
() REM () HIT				Type Side	Artic	Serial N	Quantity	De	
Add Document S Client Info Official Gramerican Client Report all gramerican Client Report	Right Left			Last Visit Info Date Appointment Type Status					
	REM			Outcome Notes Specialist					-
Status 🕝						Current User: J	ohn Doe Cas	hbox Statu	s: Opene

4. If you want to later add more information about the client, you can use the **Search** function to find a certain client and then select **Edit Client**.

	_	SEAR	CH »
FirstName			×
All	-	Search	
SEARCH RESUL	TS:		
Clients(2)			
Mr FirstName	LastNam	e	-
	ୁ Vi	ew Client	
1000	🖹 Ec	lit Client	
	P 0	oen Client screer	
	🔷 Pr	epare for offline	»
Status: Open	📑 Ex	port Client	
	Cr	eate Appointme	nt

5. Alternatively, you can select **Open Client Screen** to access the client's details page and then click the

Client Data to open the Edit Client dialog window.

link

3.6 Adding Activities

PREREQUISITE: To be able to add an Activity for a user, make sure this user is available for activities. In order to do so:

- 1. Navigate to Tools > Configuration > System > Users
- 2. Find the user in the list
- 3. Click Edit 📝 to open the User profile
- 4. Verify if the corresponding setting has been activated

For details, refer to Section 3.2: Adding Users.

To create a new activity:

1. Switch to the **Scheduler** tab (located at the upper right corner of the window).

Mr F		Scheo	luler				Clinic	Tasks		
			_							
New Appointment	New Activity]	P		-	-	-	C/	ALEND	AR »
		1		•		Μ	ay 20	20		•
Specialist Offi	ce 💌]		Мо	Tu	We	Th	Fr	Sa	Su
Sat 23/05/2020	Sun 24/05/2020			27	28	29	30	1	2	3
FirstName LastName	FirstName LastName			4	5	6	7	8	9	10
				11	12	13	14	15	16	17
				18	19	20	21	22	23	24
				25	26	27	20	20	20	21
				25	20	27	20	29	50	51
				1	2	3	4	5	6	7

- 2. You are presented with the **Scheduler** page.
 - By default, it shows the office and all the resources for this office.

	 18 - 24 May 20 	020 Week 21				New Appointme	ent New Activity
	19 Day Week	Work week Mor	nth		Office	Specialist	Office 💌
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Admin1 Admin1	Admin1 Admin1	Admin1 Admin1	Admin1 Admin1	Admin1 Admin1	Admin1 Admin1	Admin1 Admin1
12:00							

- 3. You can easily choose to view the scheduler for a selected user by clicking the **Specialist** tab.
 - All offices assigned to this user will be displayed in the scheduler.

	 18 - 24 May 20 	20 Week 21				New Appointme	nt New Activity
	19 Day Week	Work week Mor	nth		Office	Specialist	dmin1 Admin1 🛛 👻
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
12:00							

4. Now click the **New Activity** button to schedule an activity. The Create activity dialogue opens.

Create Activi	ty				X
Activity Details:					
Туре	Management work				-
Name	Management work				î
Location	Office 💌	Start Date	18/05/2020	12:00	•
Specialist	Admin1 Admin1	End Date	18/05/2020	13:00	•
Colour]			
Created by	John Doe	Date			
Modified by		Date			
Notes					
		Add Pacurranca	(Caup		rol
		Add Recurrence	Save	Can	cei

- 5. Name the activity, then specify the start and end date and time for this activity. Add comments (if any) and click **Save**.
- 6. If you want the activity to repeat on a regular basis, click **Add Recurrence** and indicate the recurrence period and time. Click **Save** to confirm the recurrence.

Activity Recurrence
Recurrence Details:
Start Time 12:00
 ○ Weekly Recur every 1 days ③ Daily
Start Date 18/05/2020 3 End after 5 occurrences
Save Cancel

7. Your recurrent activity is now added to the Scheduler.

	 18 - 24 May 2020 	Week 21				New Appoint	nent New Activity
	20 Day Week	Work week Month			Of	ffice Specialist	Admin1 Admin1 🔍
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
12:00	ර Management work $ං$	් Management work එ	් Management work ව	ံ Management work $~ ပ$	ి Management w ౪		
13:00							

8. Alternatively, you can add a new activity by selecting a preferred day and time directly in the Scheduler and right-click the mouse on this date. Then select **Create activity**.

	 18 - 24 May 2020 	Week 21				New Appoint	ment New Activity
	20 Day Week	Work week Month			0	ffice Specialist	Admin1 Admin1 🗸 👻
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
13:00							
						C	reate Appointment
						50 C	reate Activity
14:00							
						✓ 1	5 minutes
						2	0 minutes
						3	0 minutes
15:00						6	0 minutes

3.7 Adding Appointments

Appointments are created on the same Scheduler page as activities.

PREREQUISITE: To be able to add an Appointment for a user, make sure this user is available for appointments.

In order to do so:

- 1. Navigate to **Tools > Configuration > System > Users**
- 2. Find the user in the list
- 3. Click Edit 📝 to open the User profile
- 4. Verify if the corresponding setting has been activated

For details, refer to Section 3.2: Adding Users.

	K > 18 - 24 May 2020 Week 21 New Appointment New Activity						
	19 Day Week	Work week Mont	th		Office	Specialist	Admin1 Admin1 🔍
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
08:00							

To add a new appointment:

1. Click the **New Appointment** button. The **Create Appointment** dialogue opens.

S Create Appointmen	t			X
Appointment Details				
Client	Mr FirstName LastName			P 🙀
Location	Office	 Start Time 	18/05/2020	08:00
Specialist	Admin1 Admin1	End Time	18/05/2020	09:00
Status	Booked	*	Find Slot For Appoin	tment
Appointment Type	Initial visit	 Outcome 		-
Resources		*		
Created by	John Doe	Date		
Modified by		Ξ́		
Notes				
Referral Source Details				
Follow-up Visit				
Referral Source		*		
Subcategory		*		
Notes				
Campaign				
Campaign	May Promotion (07) 01/05/2020 - 31/0	5/		
			Save	Cancel

- 2. Select the office, a type of appointment, and a start and an end date-time of the appointment.
 - To select a different client, click the **Search Client** icon and the cursor will automatically switch to the search panel in the right.

)AR »	SEARCH »
	Su	All Search
Start Time 18/05/2020 10:00 Search Client End Time 18/05/2020 11:00 11:00	5	Clients(1) Mr James Doe 1233456
Find Slot For Appointment Outcome	19 26	TASKS LIST » Status: Open 💌 🕂
	3 10	

3. You can also create a new client directly from this window by clicking the Add New Client icon 振.

The **Create Client** dialogue opens.

- Fill out the client's data and click **Save** when done.
- The client in this appointment will be changed to a new one you just created.

Create Appointment			S Create Client			
Appointment Details			Personal Data			
Client	Client3		Main Personal Inform	nation		
Location	Office		Gender	Not defined 👻		
Specialist	Admin1 Admin1		Title			
Status	Booked		First Name			
Appointment Type	Initial visit		Middle Name			
Resources			Last Name	Client3		
			Date of Birth			

4. Specify other appointment details (if applicable) and click **Save** to add an appointment. Your appointment appears in the scheduler. Mouse over the appointment to see the details.

	 18 - 24 May 	y 2020 Week 21				New Appointm	ent New Activity
	19 Day Wee	Work week Mont	th		Office	Specialist	Admin1 Admin1 🗸
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
08:00	The clients is a client of the						
09:00		Client3 Initial 08:00 - 09:00 18 May 2020 Admin1 Admin1					
11:00		Office Booked					

5. Alternatively, you can add a new appointment by selecting a preferred day and time directly in the scheduler and right-click the mouse on this date. Then select **Create Appointment**.

	 18 - 24 May 202 	New Appointm	New Activity				
	21 Day Week	Work week Mont	th		Office	Specialist	Admin1 Admin1 🗸
	Mon 18/05/2020	Tue 19/05/2020	Wed 20/05/2020	Thu 21/05/2020	Fri 22/05/2020	Sat 23/05/2020	Sun 24/05/2020
	Office	Office	Office	Office	Office	Office	Office
08:00	i Client3 Initial			reate Appointment reate Activity 5 minutes			
09:00				0 minutes 0 minutes 0 minutes			
10:00							