

Strato SMS Module

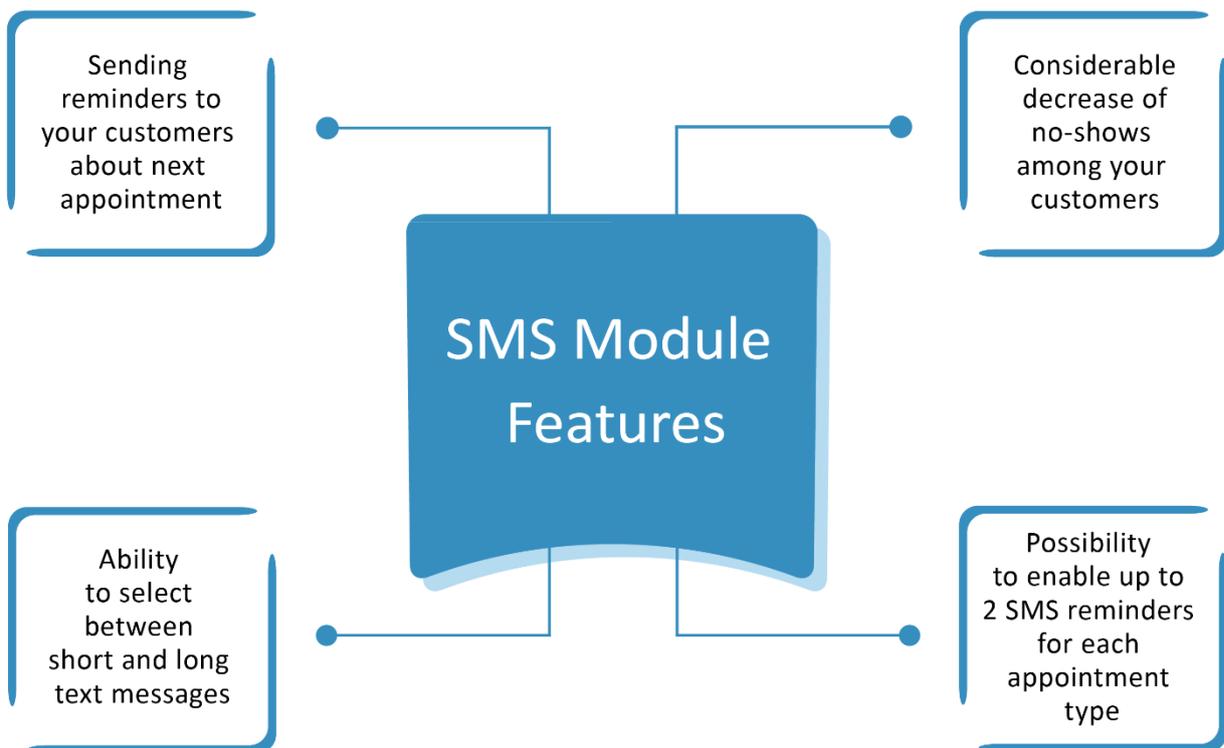
Getting Started



1 Strato SMS Module Overview

The SMS notification module is an add-on to Strato allowing you to send appointment reminders to your customers by SMS.

The below image demonstrates possibilities and benefits of the SMS module.



The SMS Notification module can be ordered on a separate basis in addition to your Strato license. Please contact stratosales@auditdata.com to make the SMS module available in your Strato system or to check whether your market is covered by our SMS provider.

When selecting an SMS provider, we have paid attention to strong data security issues to ensure a reliable SMS service.



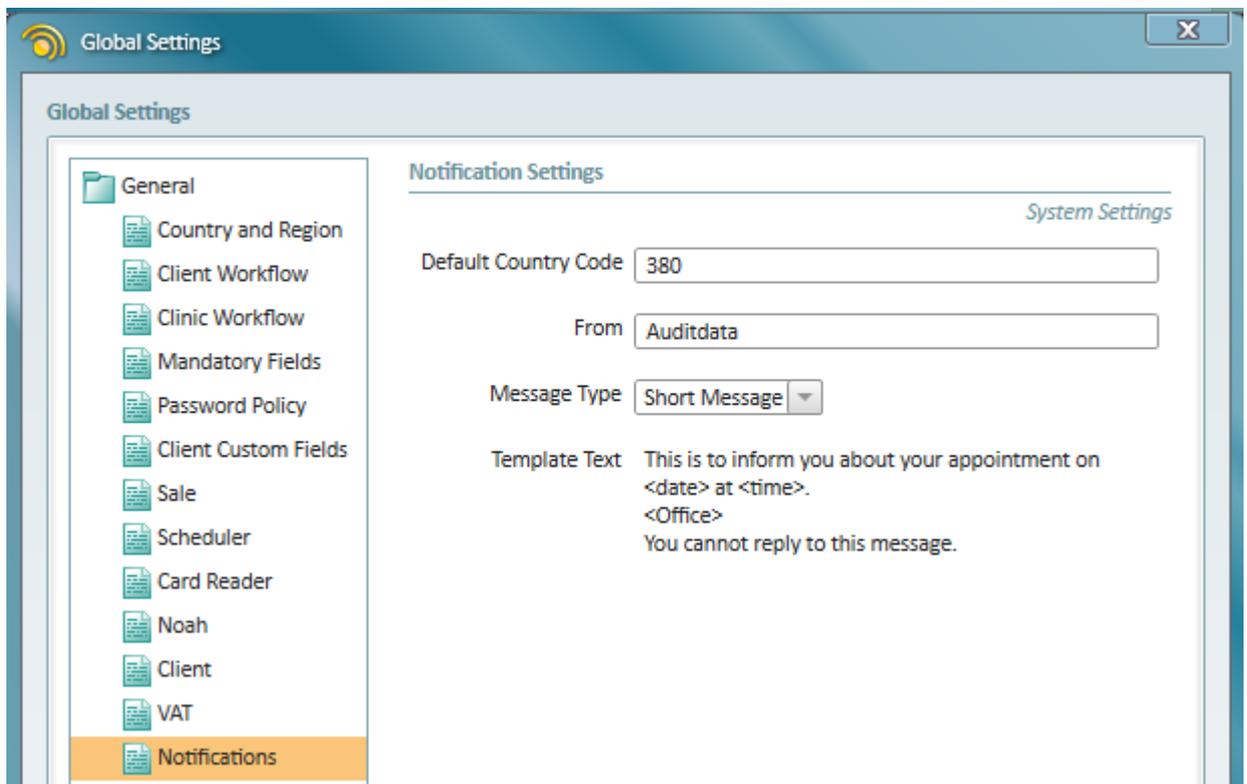
2 Configuring Strato SMS

In order to start using the Strato SMS notification service, it is required to set up a few parameters first. **Note:** This set-up must be done only once or if you later decide to change some set-up parameters.

2.1 Global Settings

To activate and use the SMS notification module, the following steps must be performed:

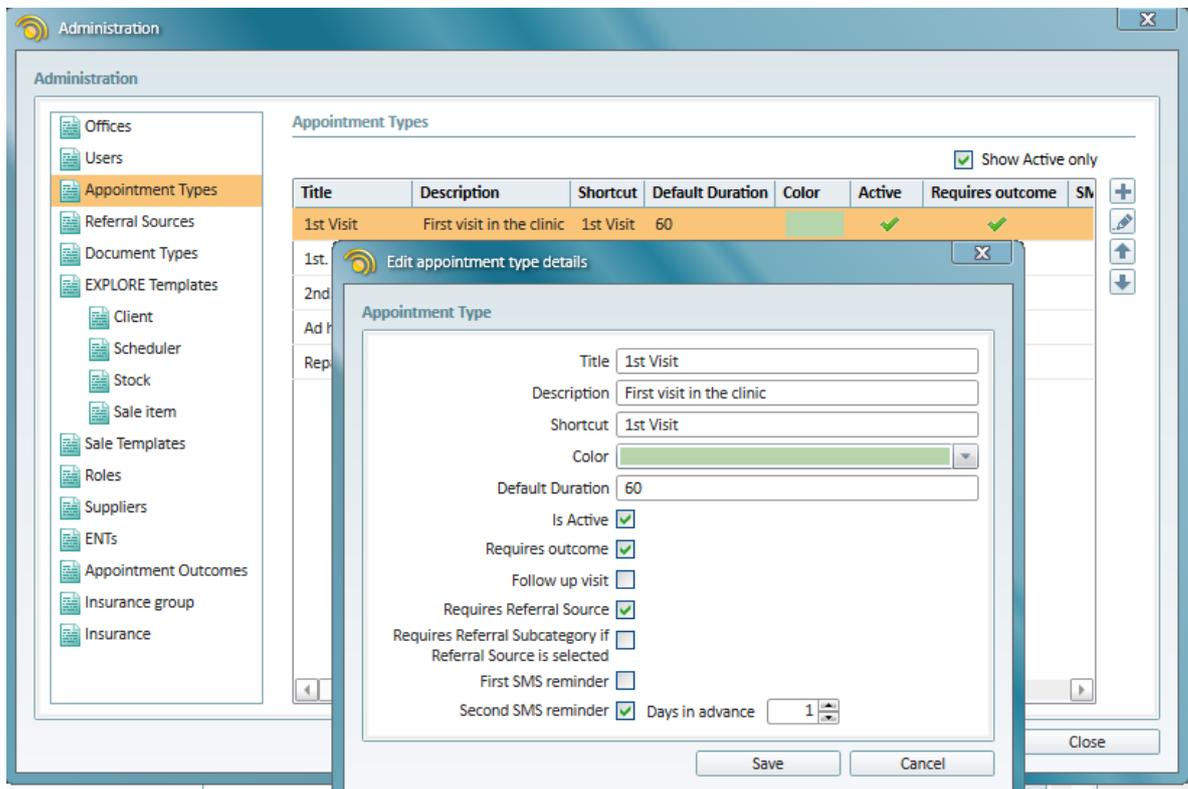
1. After you order an SMS notification, we will create an account for you enabling you to use the SMS notification service.
2. When your account has been created and activated, you will be able to set up your SMS notifications (i.e. specify whether you want a short or long SMS message). **Note:** One SMS can contain up to 160 characters; if an SMS contains more characters, it will be counted as multiple SMS messages. Select the short message to ensure that you only send one SMS message.
3. Ensure that you specify the country code for your market, so that Strato could confirm the validity of the phone numbers (this is to be done through **Global Settings**).





2.2 Configuring Appointments with SMS Notifications - Administration

1. As mentioned before, you can enable SMS notifications for different appointment types. To do this, navigate to **Administration > Appointment Types** and specify for which appointment type you want to use the SMS notifications. It is possible to activate up to 2 notifications for each appointment.
2. Select the appointment types, you want to use the SMS notification service. It is possible to activate up to 2 notifications per appointment – and specify how many days before the meeting, you want the SMS to be send (maximum 10 days in advance). Normally, one reminder 1 day (24 hours) before the appointment is sufficient.





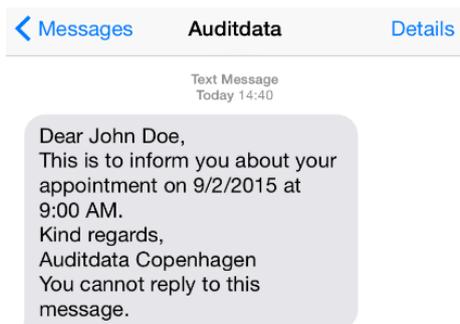
3 Using Strato SMS Notifications

3.1 Creating Appointment with SMS Notifications

When creating a new appointment (which has been set to use SMS notifications), you will notice that the appointment is now set to send an SMS message (The “Remind by SMS” option is automatically enabled).

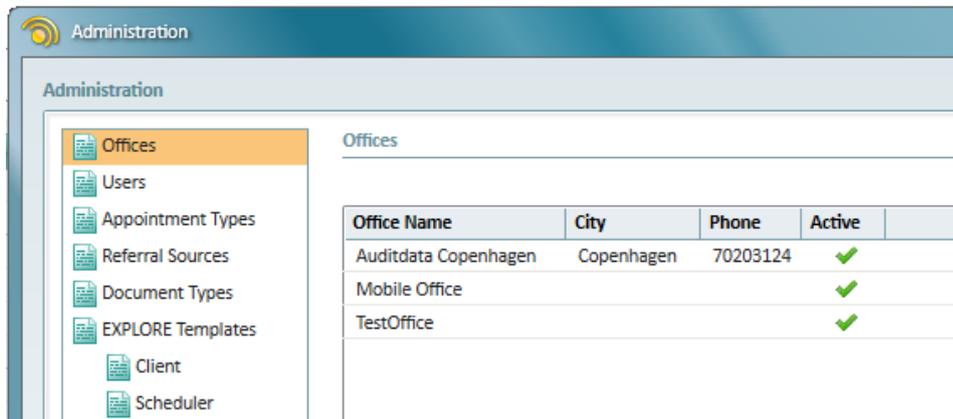
Save the appointment, and an SMS will be sent as per your setup (the below image shows a long SMS message).

If, for some reason, you do not want to send an SMS to this specific client, you can disable – or if you want the SMS to be sent to another phone number you can just edit the mobile phone number. **Note:** Editing of the mobile phone number will update the client data – so we would suggest to simply add a text after the phone number; i.e. “21728797 (son)”.



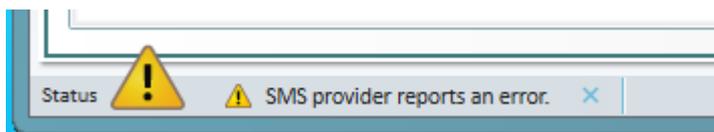
Note that:

- The sender is “Auditdata” (as specified in the SMS notification settings in the field “From:”).
- The client’s name is taken from the Strato client data.
- The date and time is taken from the scheduler. The date format depends on your Strato country setting.
- “Auditdata Copenhagen” is the “Office Name”, specified when a new office is created.



3.2 Troubleshooting Issues

Normally, you should not face any problems, but if, for example, your account has been closed for some reason, the SMS won’t be sent. In this case Strato will display a message in the status bar. If this happens, you should contact stratosupport@auditdata.com.



Note: Only Strato users, defined as “Administrator” will be informed if such errors occur.

4 Contacts

In case you have any questions on the SMS module, please feel free to contact us at any time at stratosales@auditdata.com. We will be happy to assist you and answer your questions.