DentaLab for QuickBooks
2008 Release XIV-000
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OVERVIEW

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2008 Release *XIV* -000 in April based on requests and suggestions from users of the system as well as the technical support staff.   Here is a summary list:

Invoicing Multi-Stage Cases
- the case being billed will be reviewed at the start of the invoicing process
- will check if any billable case items have a non-zero invoice amount
- if they do, a response box will be displayed asking if these previously billed items are to be transferred to this invoice
- No will be the default response
- If Yes is selected, the already invoiced items will transfer again to invoice
- If No is selected, the already invoiced items will not be transferred to invoice

Selecting Items for Product Group
- if a product group is being created or edited, a grid with active items will be shown
- each item will have a checkbox for the user to indicate to include this item in the group
- checked items will become part of product group
- designed to make it faster and easier to set up a group

Selecting Customers for Customer Group
- if a new customer group is being created, a grid with active customers will be shown
- each customer will have a checkbox for the user to indicate to include this customer in the group
- checked customers will become part of the customer group
- designed to make it faster and easier to set up a group

Pan Codes
- the pan code will be in the grids for batch work tickets and batch invoicing
- the pan code will be included in the Cases to be Shipped Report

Item Description Expansion
- In coordination with QuickBook's expansion of the item description, we now provide for up to 1000 characters for the item description in the QB invoice
- Item List report also changed to provide for up to 1000 characters
- most reports will show only up to 50 characters, depending on the space available

Transfer Received (Enter) Date to QB Invoice
- the Case Enter Date has been added to the list of fields that can be transferred to the QB invoice
- in DQB Options/Settings, this field will be added to the selection of fields to be transferred to the QB invoice with the default being Yes
- If set to Yes, the Enter Date will be transferred to the QB invoice. If not already established as a custom field in QB, it will be added as Received Date
- If users wish to show this on the QB invoice, they will need to further customize their invoice template in QB

Technician Productivity Report
- for those times when you specify a range of dates, we have added sub-totals for the columns by date

Standard Procedure Deletion
- previously you could not delete a standard procedure if it was used in a case
- now if you request deletion of a standard procedure, you will be given a warning if it has been used in one or more cases, but you will be given the option to confirm deletion

Standard Procedures and Incentive Pay Schedules
- when creating a new standard procedure, if you choose a billable item that has an incentive pay by percentage schedule already setup, you will be asked if you wish to transfer this schedule of items to the standard procedure
- this has been designed to both save time and assure coordination between standard procedures and incentive pay tasks