DentaLab for QuickBooks
2014 Release XXXVIII-000 April
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This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2014 Release XXXVIII in April on requests and suggestions from users of the system as well as the technical support staff. The first list will be applied only to the standard version, The second list below will be applied to the starter version.

Invoice Settings – Option to Append Request Time to Request Date

In Invoice Settings/Custom Fields for selection of case fields to transfer to the QuickBooks invoice, a new indicator has been added to the right of Request Date to include the Request Time. If checked on, the case request time will be included with the request date. Sample: 04/15/2014 Noon

Case List – Add Rep Field to Customize Columns Selection List

For each customer synchronized from QuickBooks, we include the Rep field which is used to store the representative or sales person assigned to the account. In the actions for Case List, you can customize the columns to be displayed. We have added the Rep field to the selection list.

New Reports on Case Item Completions

To comply with government regulations, each lab should be recording which technician completed each case item. There are three methods of recording: keyboard entry, tablet touch, or barcode scanning of work tickets.

New reports to provide this information are now available in Cases/Case Item Completions for a selected completion date range for all technicians or one selected technician. For each technician, the standard sequence will be completion date, case number, item name with total quantity (in units) for the date range.

Introduction of Column Heading Sort within Report

This new Case Item Completions report also introduces a new capability for DQB reports. Just as you can click on column headings in screen grids to sort the data in a column, you will now be able to sort columns in reports. We will continue in future releases to add this capability to more reports wherever appropriate.

Customer Profile Report – More Space for Custom Fields

The Customer Profiles Report has been modified to provide for more space for longer entries in the 10 custom fields.

New Custom User Roles for Security

In Options/Users & Security, we have had five levels of security for the most common user roles: Manager/Administrator, Entry, Case Entry, Technician Plus, Technician.

You will now have the capability of creating new custom user roles for security levels. For example, you may want to create a Business Development role to give access to the Customer Center or a Delivery role to give access to the Pickup and Delivery list.

First, you will enter a unique name for the custom level. Then, you can begin the selection process with one of the existing levels or begin with no selections. You next check which selections the custom level can access and then click Save to create the new custom level. .

Once complete, the custom level will be available for assignment to a user. Only the manager level can create and/or edit a custom level and make the assignments. The options for users and security and to restore the database will continue to be restricted to the manager.

Option to Detect Idle User and Automatically Logout

In Options/Company Information/Application for Idle User is a new indicator. If you check this, the program will determine if a logged-in user has been idle for the specified number of minutes and if yes, the user will automatically be logged out so other users can log in. The default number of minutes is 10, but you can override this with another number. The minimum is 5 minutes.

Note: This option is most applicable to networked systems.

New Standard DQB Invoice Format

As we anticipate more labs will use DQB to print their invoices rather than QuickBooks due to the upcoming introduction of IdentAlloy e-certificates, we have updated the format of the standard DQB invoice. The new version will include more of the case and invoice fields. If you have a custom DQB invoice, please let us know if you wish to have this adapted to be comparable to the standard.

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This list will be applied to the starter version (single station only) and will add capability already proven in the standard system:

<u>Basic Lists – Tooth Charts</u>
In this option, the user can setup tooth charts for use in case entry. The two most common standards have already been setup: Universal Numbering System and FDI World Dental Federation Notation.

The user can also indicate which chart to use as the default in case entry.

<u>Case Entry – Selection from Tooth Chart</u>
In Case Entry, the user can now select the tooth numbers from the charts setup in Basic Lists. Free-form entry will also remain available.

<u>Reports Menu – Extra Time Cases</u>
To help determine which cases can be rescheduled, the **Extra Time Cases** report will list open cases with 2 or more extra days between the scheduled end date and the doctor's request date.

<u>Options/QB Synchronization for QB Company File Changes</u>
For changing your QuickBooks company file or its location, two buttons have been modified:

Change QB Company File – This option will refresh your DQB database to work with a brand new QuickBooks company file. Because it removes data related to the prior company file, it requires a password and coordination with Mainstreet.

Change QB Company File Location – If your QuickBooks company file is the same, but its location has changed, this option provides a simple way to specify the new location. If you do not know the location of your QB company file, while in QuickBooks press the F2 key to determine this and other vital information.