

**DentaLab for QuickBooks**  
**2017 Release L-000 April**

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This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2017 Release L (1.50) in April on requests and suggestions from users of the system as well as the technical support staff.

These enhancements have been applied to the standard version.

**Advance Bill/Estimate for Case**

Previously when an estimate was requested, this had to be developed in QuickBooks. This new feature provides for doing this in DQB with these advantages:

1. The price levels established in DQB will be used when assigned to the specific customer rather than the default prices in QuickBooks.
2. You can save the case as a pre-booked or on-hold so that it ready if the case proceeds.
3. The pricing can be saved as an advance bill for easy transfer to the live bill in single or batch invoicing. This assures that the pricing offered to the customer is honored.
4. You can also generate an Estimate form that can be printed or saved to one of the industry-standard formats for issuance to the customer.
5. You can choose to use the standard Estimate format or request customization for features such as color, logo, marketing messages.

In the Case List and Case Entry action menus, we introduced in January 2017 a new option to preview the invoice for the case. This developed the invoice for the billable case items using the pre-established prices in QuickBooks or the assigned DQB Price Level for a visual presentation. It also provided a review of the invoice history for the case.

The menu option is now called Advance Bill. In this release, the user is given an option to edit the invoice and enter invoice messages and then Save to Advance Bill to store the information in the advance bill table for use when invoicing. If edited, the program will calculate a new total.

If an advance bill already exists for the case, it will be displayed and the user can choose to edit, delete or simply view it.

From this screen, the user can also Generate an Estimate to be displayed, then printed or saved to one of the industry-standard formats for issuance to the customer. The format will be similar to the invoice, but will say Estimate. The user will be able to add a message to the recipient.

If an advance bill is available, its information will be used to create the actual invoice in both the single and batch methods.

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### **Memo Fields: Scrolling to Insert from Standard Notes**

There are a number of areas in the system where text can be entered with the option to insert from the standard notes you have set up in Basic Lists-Lab Notes. Right click and then Select from Standard Notes to display the selection list that is scrollable with up/down arrows.

### **Options: Case Settings and Starting Case Number**

The option to set the starting case number has been expanded to provide for setting the next case number not only when first starting to use DQB but also at any time as long as the next number is higher than the highest case number already existing. The screen will show the minimal case # that can be entered.

The program has also been set to alert the user when entering the very first case to set the starting case number if it is any number other than 1.

### **Options: Case Settings Date Tab and Invoice Settings Date Frame**

For better design and to make access easier, we have placed all of the case settings dealing with dates in one tab with a title Dates, For invoice settings, the date options have been consolidated into one frame with a title Dates in the last tab. For the newly added date settings, see below.

### **Options: Case Settings for Which Date to Initialize Case List**

Currently the default date to initially display the Case List is the Entered Date. We have provided an option to choose a different date from the list of critical dates at the top of case entry. The selection list includes Entered, Start, End, Ship or Request.

### **Options: Case Settings on Initial Date Range for Case List**

Currently the initial date range setting for the case list is for 2 calendar months ending with the current date. This option would provide for the user to specify a different number of months for the starting point of the range. .

### **Options: Case Settings to Set Start Date One Workday after Enter Date**

The standard for a new case has been to set the Start Date to the Enter Date. Setting this option would initialize the Start Date to the next workday after the Enter Date.

### **Options: Invoice Settings to Set Invoice Date**

In Options/Invoice Settings we added an indicator to always set the invoice date to the case ship date. Initially the default setting will be System Date.

