DentaLab for QuickBooks
2006 Release XI
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OVERVIEW

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2006 Release *XI* based on requests and suggestions from users of the system as well as the technical support staff. Here is a summary list:

New Splash Screen
Easier Backup/Recovery
Product Groups
Case Types
Routing/Shipping

Critical Dates
Changing Invoices
Work Ticket: New Fields, Choice of Sizes and Content
Cases to Be Shipped Report
Case Lists: Invoice Dates, Default Status

Reassign Case to Another Doctor
Redesign Controls for Basic Lists
Schedule Factors
Item Notes
Basic Lists Screen/Print Reports

Pickup/Delivery Lists
Case Purge Utility
Invoice Dates
Start Dates
Ship Case Utility

Case Labels – Addition of One-Up Labels
Quality Control Feedback Forms
Remake Case – New Calculations
Case Summary Report – New Options
Customer Information
Security and User Permissions

Scanning Supplement: New Browse/Select for Images
Barcode Supplement: Scan Case Number for Shipping

More details can be found on the following pages. In addition, we have developed a number of white papers for more in-depth discussion and training on specific topics. These are available upon request.

NEW SPLASH SCREEN

The splash screen launched at the start of DentaLab always lets you know what the program is doing.

EASIER BACKUP/RECOVERY

From the top task bar in DQB, you can now click on File, then Utilities and then Backup. A filename indicating the weekday and date will be shown in the browser window. The filename and location can be edited to match your backup media or location. A Restore option is also available to administrators with the option to select from the list of backup filenames.

PRODUCT GROUPS

The concept of grouping items (products and services) into classifications called Product Groups was introduced. The user specifies the name of each Product Group and then selects items (products and services) from the Item Table to be included in the group. An item may be included in more than one group. The number of Product Groups that can be setup is unlimited.

Then for selected date ranges, product groups statistics can be reported the screen or to a printed report. These include for each item in the group its estimated value based on default price for scheduled work, its actual billed amount based on work invoiced, quantity and remake amount. Totals are then provided for each product group.

CASE TYPES

**Each lab can establish a table of Case Types and then select a type for each case.
Some examples might be Fixed vs. Removable, In-House vs. Out-Sourced.
Cases due reports can then be sorted by Case Type.**

ROUTES/SHIPPING

Designed to coordinate with the shipping routes in QuickBooks that are used in its Shipping Manager, the same routes can be assigned to customers in DQB. The Cases due reports can then by sorted by route. This field is shown in other reports as well as part of the case information.

CRITICAL DATES

There are five critical dates associated with each case: Received, Start, End, Ship and Requested. These have been moved to the top of the case entry screen and are shown in a row so that they can be seen at any time during case entry.

CHANGING INVOICES

There is now greater flexibility to change or update quantities and pricing when creating an invoice in DQB. Previously, the user had to click to QB to accomplish this.

WORK TICKET: NEW FIELDS, CHOICE OF SIZES

The standard work tickets now include Case Type, Item Notes and Ship Route. There are three standard sizes, one for Letter (8.5 x 11 inches) and two for international ISO sizes A4 and A5. In the company settings, you can choose your size. If licensed for one of the barcode supplements, barcodes will be printed for the case number and for each labor-related case item. Work tickets will include scheduled incomplete items, unless the user checks the Setting to also include completed items. Customization for content, fonts, colors and graphics is also available.

CASES TO BE SHIPPED REPORT

A new report has been added to show cases to be shipped for a specified date range.

CASE LISTS: INVOICE DATES, DEFAULT STATUS

If a case has been billed, the latest invoice date will be shown in a new column in the case lists. In the company settings, you can also specify a default status for the case lists, e.g. include all cases, open cases.

REASSIGN CASE TO ANOTHER DOCTOR

If a case has been entered for the wrong doctor, you can now change the customer to another one without having to delete and re-enter the case.

REDESIGN CONTROLS FOR BASIC LISTS

All of the controls (such as new, edit, delete) for the tables in the Basic Lists set have been redesigned for easier selection and entry with less possibility of user error.

SCHEDULE FACTORS

For those who want to fine-tune their scheduling, schedule factors can be setup for items. These are essentially multipliers that are applied to case entry items. The default value is 1, but this can be increased to a higher integer value (such as 2, 3, 4) to indicate complexity or difficulty and therefore a longer time needed in the schedule. The value can also be set to 0 to indicate that the item should have no effect on the schedule. The user can change the item's schedule factor for a specific case.

ITEM NOTES

Notes to guide the work or add specifications can be added to any item. These are then transferred to the case whenever the item is added, but may be modified or removed by the user. In addition, the items in Standard Procedures can have notes that are transferred when the procedure is added to the case. Item notes are printed on the standard work tickets.

BASIC LISTS SCREEN/PRINT REPORTS

From the top task bar in DQB, you can now click on Reports, then Lists and choose from the following basic lists:

Customers	Items	Technicians	Price Lists
Work Centers	Standard Procedures	Product Groups	

First the screen report will be displayed. You can then click the Printer icon to send the report to the printer.

PICKUP/DELIVERY LISTS

When you receive requests from your local doctors to pickup the cases they have ready for you, you can record these and then generate lists by date and route, with groupings by doctor, for both the requested pickups and the cases scheduled for delivery. The lists can include the doctor's name, full address and telephone as well as case memos for patient names and other case information. Counts and check-offs are provided for the number of pickup requests as well as cases to be delivered.

CASE PURGE UTILITY

This is a new utility that provides for purging obsolete case records by date. From the top task bar in DQB, you can now click on File, then Utilities and then Purge Cases. You will next be asked to enter a date. All cases and related notes entered prior to this date will be removed. You must be logged in at the administrative level to use this option. This utility can be useful if your case records have reached a large volume and you wish to improve system speed or if you have been in the trial period entering practice cases that you no longer wish to keep.

INVOICE DATES

Previously the system recorded the system date as the invoice date for a case. Now, if you have changed the default system date to another date, it will record your new invoice date.

START DATES

Previously the system used the case entry date as the starting point for scheduling the case. Now, if you change the default start date to a future date, it will use your new start date.

SHIP CASES UTILITY

From a grid of all cases scheduled to be shipped for a specified date, the user can now easily check off the cases actually shipped and mark the quality control completions.

CASE LABELS – ONE-UP

Another option for case labels has been added to print one-up labels to a Brother label printer. Additional options may be added upon user requests.

QUALITY CONTROL FEEDBACK FORMS

A generic quality control feedback form with specific case information has been added. This can be requested in the same manner as case labels for one or more cases. We are offering customization of the form on a billable basis.

REMAKE CASES – NEW CALCULATIONS

If a case has been marked as a remake case, a special screen will be provided for invoicing. The customary price for the customer and item will first be shown, but the user can change the price by designating a percentage or a specific price. The new price will be used for the line amount. The remake column will represent lost revenue, i.e., the difference between the customary amount and the actual amount invoiced.

CASE SUMMARY REPORT – NEW OPTION

A new option has been added for the case summary report to include only scheduled, but incomplete.

CUSTOMER INFORMATION

On all screens that provide the customer name and address, the format has been improved and now also shows the namekey, account code and contact name.

SECURITY AND USER PERMISSIONS

The security system that requires user-identifications and passwords was improved. The ability to view items was extended to those with entry-level permissions.

FOR SCANNING SUPPLEMENT – BROWSE/SELECT IMAGES

For those with the scanning supplement, you can now use a Windows-style browser to navigate and find JPEG images that have been obtained from other sources, such as email attachment downloads, and associate them with specific cases for future viewing.

FOR BARCODE SUPPLEMENT – SCAN CASE NUMBER FOR SHIPPING

You can now scan the barcoded case number from the work ticket to indicate that a case has been shipped.