

DentaLab for QuickBooks
2011 Release XXV-000 January

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2011 Release XXV-000 in January based on requests and suggestions from users of the system as well as the technical support staff. These will be applied only to the standard version unless otherwise indicated. Here is a summary list:

Copy Price Level to Start New Price Level

This new option provides for creating a new price level by copying a prior price level and then editing. It is designed to be used when a new price level is similar but not identical to an existing one.

This is available from the action menu for Basic Lists-Price Levels. The user would first select an existing price level and then request it to be copied to a new one. Then the user would change the name from Copy of (prior price level) to the new price level name. Next the user would edit the new price level as desired and save it.

Keyboard Shortcuts:

In some of the menu options in the Cases section of the new Home Page design, you will see in parentheses a keyboard shortcut using the CTRL (control) key plus a letter as follows:

- CTRL+L for the case list
- CTRL+N for a new case
- CTRL+I for batch invoicing
- CTRL+W for batch work tickets
- CTRL+S for the master schedule

Patient Match for On-Hold and Out-for-Tryin Cases:

This new option provides for a display of matching On-Hold and Out-for-Tryin cases for a customer and full/partial patient name in Case Entry.

For this option to be active, you must first check the box in Options/Case Settings to display patient name matches for On-Hold and Out-for-Tryin cases.

Then if you select a customer and begin to enter a patient name for a new case, the system will check to see if there are any cases in the On-Hold or Out-for-Tryin status that match. If there are, these will be displayed in a grid and you will be given the option to select a case and reactivate it rather than entering a new case.

New Option to Limit Cases to be Shipped Report to One Ship Method:

From Reports/Cases to Be Shipped, the screen display now provides an option to include all cases to be shipped on the selected date or limit the report to just one selected ship method. If you wish to choose one ship method and then return to all methods, you can delete the selected ship method to generate the new report

Invoice Register:

In conjunction with the new option introduced in the last release to print QB invoices created from DQB cases in DQB, there is now a new option to display/print an invoice register for a selected range of invoice dates in DQB. This can be found under Cases/Invoice Register. This register is more detailed than the Transaction Report available in QuickBooks.

Batch Invoice Printing:

In conjunction with the new option introduced in the last release to print QB invoices created from DQB cases in DQB, there is now a new option to select and print a batch of invoices in DQB. This can be found under Cases/Print Invoices. You first find the invoices by entering criteria in the Find section: by range of invoice dates, case status, patient name, doctor name, account, case number, case stage, case type, entry by, short memo. You can also check individual invoices in the selection grid and or click Select All or Select None.

Note that we provide with the standard system an invoice format similar to the ones provided in QuickBooks that includes the fields being transferred from the case such as patient name, shade, teeth, etc. You can request customization of this format.

Case Entry-Show Office Closed and Days to Ship Fields:

To aid in scheduling, two customer fields will be shown in Case Entry below the Customer Contact information frame: Office Closed and Days to Ship

Show Office Closed Field in Reports:

The Office Closed field from each customer record will be shown in these reports: Call Doctor, Pickup/Delivery List, Cases to be Shipped