

DentaLab for QuickBooks 2015 Release XLI-000 January

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2015 Release XLI in January on requests and suggestions from users of the system as well as the technical support staff.

New Email Capabilities for Cases and Customers

With this release, new email capabilities have been added for case and customer communications.

These have been placed in a number of convenient locations:

1. from the Email tab in Case Entry for both the standard and starter versions
2. in the left frame menu of the Customer Center for the standard version
3. from the Actions menu or right-click on selected case in Case List
4. from the email tab for a selected customer in Basic Lists-Customers

The email address entered In QuickBooks for each customer or job is synchronized into DentaLab for QuickBooks (DQB) and will be readily available for case and customer emails. It will also be displayed in a number of locations throughout the system adjacent to other basic customer information.

You will also be able to add additional email addresses to your DQB address book. When writing your email, click To or CC to access your address book.

This new email capability provides a number of time-saving features:

- templates to use common fields in the subject line or body of the email
- easy selection of primary customer and case fields to insert into the email
- ability to easily attach documents, case images to emails, compress if needed
- the user can preview emails, test settings and layouts, request onscreen guides
- an option to search case-related records such as case plans, case communications, action required messages for email addresses

In Options/Email Settings, you will need to setup your email credentials and security settings, as well as a default layout for your emails.

The email layouts have been developed with the standard reporting tool that is used for reports and forms throughout DentaLab for QuickBooks. This means that you can submit requests to have Mainstreet customize unique formats for your lab.

Customer Center

The Customer Center in the standard version has a fresh new look with more advanced technology to provide your business development personnel with more flexibility to move and forth among related customers and between categories of information for each selected customer.

The new email capabilities have been included in the Customer Center so that you can create and track emails during your business development/marketing activities.

Ability to Mark Work Center Inactive

Previously once a work center has been used in a case, it could not be deleted as it might be needed for case history even if it is no longer being used. You can now mark a work center as inactive.

As the complexion of outsourcing keeps changing and digital dentistry continues to increase, there have been greater changes in work centers for scheduling. This is necessitating this new feature that was hardly needed with the traditional in-house work centers. Inactive work centers will still be available for historic cases, but not for selection within new cases or new standard procedures.

Invoice Register for One Customer

The current invoice register provides for selection of a date range and then shows/prints all cases invoiced in that date range. This enhancement provides for generating the same report for one customer.

Vendor Return Date

The vendor return date was being set to the scheduled date for the last case item. This has been changed to retain an entry that has been made by the user.

Event Logging for Cases

Each major addition or change to the table of cases will be recorded in an event log, including the date, time and user login. The logs will remain available for 30 days to track and report these.

Notifications Center – Option to Use Invoice Date for Shipped Report

In the Notifications Center, we have added a new indicator you can check to use the case invoice date instead of the shipped date to determine whether a case will be in the Cases Shipped Report.