DentaLab for QuickBooks
2016 Release XLV-000 January
****

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2016 Release XLV in January on requests and suggestions from users of the system as well as the technical support staff.

Unless otherwise noted, the enhancements have been applied to only the standard version of DQB.

Basic Lists - Price Level Option to Add All Items

For a new price level, there is now a button to add all active items to the list. The user can then override the default prices for each item.

Basic Lists – Items Actions to Cross Reference to Standard Procedures

In the actions menu for items, there are now three options to cross reference to standard procedures:

1. Cross Reference Item to Standard Procedures
2. Use of Item in Standard Procedures
3. Cross-Reference All Items to Standard Procedures

Case Entry – Presentation Changes

For the Case Notes in the General tab, you can now double-click anywhere in the case notes field to have a much larger window pop up for your entry.

For Case Items in the Add Items tab, the entry of the quality control and assigned technician fields has been moved up to the right of the item selection frame. The selection list for items has been enlarged to assure that those items with long names are shown in full.

To speed entry, the loading of information in the right half of the tabs has been changed to on-demand loading.

Case Invoices – Add QuickBooks Classes to Transactions

In QuickBooks, you can create classes that you assign to transactions. This lets you track account balances by department, business office or location, or any other meaningful breakdown of your business.

Many business owners have certain segments of their business that they want to keep a close eye on. By using the class tracking feature, you can define these segments and track their associated account balances on invoices, bills, and other documents. Businesses with different departments or locations can use classes to report account balances for each. To turn on class tracking in QuickBooks:

1. Go to the Edit menu and click Preferences.
2. In the Preferences window, click Accounting in the list on the left.
3. Click the Company Preferences tab.
4. Select the Use class tracking checkbox.
5. Click the OK button.

To create/edit classes, go to the Lists menu, then Class Lists.

DQB Synchronization for Classes

In Options/QB Synchronization, there is a new option to synchronize Classes for both the automatic and manual synchronizations. The default setting is Off. You will need to check this to On if you wish to add classes to your invoice transactions in DQB.

DQB Optional Assignment of Class to Customer

If you have turned on the above settings for classes, a default class can be selected for a customer in DQB. The class field in Case Entry will be initially set to the selected class for the customer. Note that this is optional as a lab may choose to have a different basis for assigning classes.

DQB Use of Classes for Case Items

If you have turned on the above settings for classes, you will be given the option in Case Entry to select a class to be applied to all case items. You will be given the opportunity to select a different class when adding a new case item or editing an existing item.

When creating an invoice for a case, the class for each line item will be transferred to the QuickBooks invoice. When displaying invoice history information, the class for each line item will be shown. The standard DQB invoice will include the class for each line item. If you wish to have the QB invoice show the class, you can check this in the template associated with the invoice**.**

For Reports/Sales Analysis, there will be an option for Summary by Class for which you can select all classes or one class. Totals will be provided for each class.