

DentaLab for QuickBooks
2017 Release XLVIII-000 January

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

These enhancements have been applied to the standard versions.

Option to Not Adjust Ship/End Dates

When a case is scheduled, the End and Ship dates are set to the scheduled completion date for the last case item. Now in Options/Case Settings, there is a new option if you do not wish to have the program adjust these dates.

Also, when the last case item is completed, the Ship date is updated to the completion date. In Options/Case Setting, you can request that the program not adjust this. The default setting is Off.

Concurrent Access to Case Record

In Case Entry/Edit only one user can be entering or editing the case at a time. If another user requests the same case, the program will alert them that it is being updated and ask if the user would like to be able to view it. The program then asks for the entered information to be saved and allows the subsequent user to view the case.

Setting of Dates Upon Reactivation of Case

When reactivating a case that has been out for try-in or on hold, the user will now be asked whether to reset the entered and start dates to the current date. The user can elect to keep the original dates for the case or have them reset.

Additional Save Button for Case

In Case Entry/Edit, there have been two save options:

1. Save and New to save the case and proceed to create a new case for the same customer.
2. Save and Close to save the case and return to the case or customer list.

The new button is only to Save. This will serve to assure the fields already entered will be saved should the user need to interrupt the entry. The screen will remain open for a return to the entry process.

Print Case Enclosures List

In Case Entry/Edit in the Add Enclosures tab, there is a new Print button to show/print a list of the enclosures for the case.

Cases to be Shipped Report

A new option has been added to the Cases to be Shipped Report to also include cases that were scheduled to ship on the specified date and have already been marked as shipped. If this option is on, the Shipped Status and Date will be shown.

Custom Setting for QB Invoice Due Date

QuickBooks provides in Preferences a list of ways to automatically set the invoice due date. If the lab needs a custom setting, the program now provides for specifying to DQB how to set the due date when first creating the invoice from a case. Currently the selection list has just two possibilities, one to use the QB default and the other to set the due date to the end of the next month. Upon request, we can add more custom settings to the list.

Preview Invoice for Case

In the Case List and Case Entry action menus is a new option to preview the invoice for the case. This develops the invoice for the billable case items using the pre-established prices in QuickBooks or the assigned DQB Price Level. This is the first step toward new features that will be introduced in the next release.

Synchronization Option to Limit by QB Customer Type

In Options/Synchronization, there is a new indicator to limit customer synchronization by the type field in QuickBooks. If checked, the user can select the QuickBooks type field to limit the synchronization to those customers with a matching type. The matching to this field will be case-insensitive.

Invoicing Optimization

The batch invoicing process has been optimized to handle larger volumes of cases having invoices created in QuickBooks.

Scanner Settings

Two scanner settings have been added to Options/Case Settings/Images to provide for compatibility between older vs. newer technology in hardware and software. These can be used with guidance from tech support when needed.

DentalRx Enhancements re Printing of Prescription

The prescription form that can be printed at the dental office will also be available in the lab from the DQB case entry/edit screen.

In the dental office, the option to print had been limited to open cases. This will be expanded to include finished cases.