

OVERVIEW

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2008 Release XV-000 in July based on requests and suggestions from users of the system as well as the technical support staff. Here is a summary list:

Case Short Memo Field

- New field up to 10 characters
- Use is optional, can be used for whatever purpose the lab wishes, such as short ID or alert, alternate doctor in group practice
- Will be shown as new sortable column in Case List grid
- Has not been added to standard reports or work tickets

Case Packing List

- Similar to standard invoice formats on letter-size paper, but does not include prices or dollar amounts
- Includes patient name, shade and teeth
- Can be requested from Action menus associated with case
- Formatted for use with 2-window envelopes showing lab name in window near top and shipping address in window near bottom

Options - Invoice Setting to Confirm Status

Added a new option: Have user confirm status for each invoice

Default will be ON (checked)

If user checks OFF (unchecked), the window for selecting/confirming invoice status will not be displayed and the default status will be recorded

Case List – Selection of Cases

- In addition to double-clicking of mouse for selected/highlighted case, also provide for pressing the Enter key to select

Options – Invoice Setting for Default Remake %

- Added a new option: Default billing % for remakes
- Initial setting will be 100
- User may override with value 0-99
- When billing, if the default is other than 100, the billing percentage will be applied to the line amounts if the case has been marked with Remake? set to true (ON).

Options - Company Information

- Two new fields for Registration and Certification, variable length
- Will be displayed on Case Materials Disclosure report
- Recommend that user include type of Registration or Certification, e.g. FDA 12345 or DAMAS 7890

Basic Lists – Customers

- New field for doctor's license code, in preparation for upcoming on-line prescription entry

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Basic Lists – Materials Disclosure

- Each Materials Disclosure list will include a title/description and then list of materials
- Each material record will include manufacturer, part/description, batch or lot codes
- May be assigned to an item in Basic Lists- Items.
- Will be used in Case Entry to select for case items
- May be edited for specific case
- Designed to provide ease of use and time-saving for standard list

Case Entry – Materials Disclosure Tab

- New tab to view/edit materials associated with case
- If Materials Disclosure assigned to an item in Basic Lists-Items, will automatically enter materials list for case
- In addition, Materials Disclosure list can be selected at Case Entry
- Case Materials Disclosure List can be edited for specific case.
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Print Case Materials Disclosure Report

- Available option from Case List and Case Entry
- Can be displayed/printed and sent to doctor and/or held in house
- Includes company with registration/certification(s)
- Includes case header information such as number, patient
- Includes case billable items and materials
- Separate page for each case

Case History Report

- Adds new section for case materials disclosure

Case Materials Analysis Report

- Available from Left Navigation/Reports
- User selects date range for cases entered
- Must select Manufacturer, full or partial match
- Can optionally select part/description and batch/lot, full or partial match
- Report title will reflect search criteria
- All matching cases will be included, with case number, customer name with address and telephone, patient name, dates entered and invoiced, case item(s) with quantity and description, and case materials list