

DentaLab for QuickBooks 2018 July Release 1.55

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2018 July Release 1.55 based on requests and suggestions from users of the system as well as the technical support staff.

The following enhancements have been applied to the standard and starter versions:

Options/Case Settings – New Indicators

We recommend that each doctor within a group practice be set up as Job in QuickBooks, which synchronizes each of them to have their own customer record in DQB. For those who do not follow this standard, we have now included a Prescribing Doctor field in Case Entry. A new indicator has been added to say whether to populate the Prescribing Doctor with the doctor name if created as a Job in QuickBooks.

To the set of Required Field Indicators, we have added:

1. Entry of reason if Remake
2. Entry of reason if Adjustment

Options/Email Settings – New Templates

In Email Settings, to date we had provided for a default email and a welcome email. There is now a new tab for templates that you can name and setup and then use wherever DQB provides for emailing a report to the customer. This will be used first for the new Reports/Remake/Adjustment Review for emailing to customers.

Options/Invoice Settings – Item Classes

There are three new indicators for item classes:

1. Whether to give priority to customer class or item class if both present
2. Whether to require selection of a default class for item in Basic Lists-Item
3. Whether to require an item class when invoicing

Basic Lists – Items/Assignment of Class

This now provides for selection of a default class for each item, based on the option chosen in Invoice Settings for item class.

Case Entry-Highlight Which Tabs Have Entries

The tabs in case entry will have bold fonts for their names if there is activity. When applicable, a count will also be shown after the tab name. Sample: **Case Enclosures (2)**

Case Entry-Show Dates First and Last Active in Customer Frame

To help with identifying new customers and reactivations, the customer information frame that can be requested now includes Date First Active and Last Active.

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Case Entry- Selection of Reason for Remake or Adjustment

If Remake checked, you can select a reason from Basic Lists-Quality Control Reasons or enter a new reason. If Adjustment checked, you can select a reason from Basic Lists-Quality Control Reasons or enter a new reason.

Case Entry- Custom Fields Increased to 6

With the reformatting of the case entry screen for the above, we were able to increase the number of custom case fields displayed from 3 to 6.

Case History - Add Reason for Remake or Adjustment

The Case History report now includes any reasons entered for Remakes or Adjustments.

The following enhancements have been applied to the standard version:

Reports – Key Business Indicators

This is a new report to provide statistics on key business indicators to review/compare performance month by month within a chosen year. The Key Business Indicators for the month with their source are:

Sales	total invoiced amount in currency
Units	total quantities from invoiced items
Average Sale/Unit	Sales / Units
Invoice Count	number of invoices with non-zero amount
Average Sale/Invoice	Sales / Invoice Count
Zero Invoice Count	number of invoices with zero amount
Remake Count	number of invoices for DQB remake cases
Remake Lost Revenue	remake amounts from DQB remake cases
Remake % of Sales	Remake Lost Revenue * 100 / Sales
Work Days	From calendar, add weekdays; if Sat or Sun on, add; subtract holidays
Average Sales/Day	Sales / Work Days
Average Units/Day	Units / Work Days
Accounts Invoiced	number of customers invoiced in month
Average Sale/Account	Sales / Accounts Invoiced
New Accounts	count based on Date First Active in month
New Account Sales	total amount invoiced for new accounts
Average New Accounts	New Account Sales / New Accounts

Reports – Remakes/Adjustments Review for Doctors

Reports/Remake/Adjustment Review for viewing, selection to email to customers based on reasons entered during case entry. In the top criteria frame, you can select date range, remake or adjustments, customer, then browse Next/Previous through customers. For emailing, you can select template setup in Options/Email Settings for message with emailed report, then email customer. You can also choose to print/save the report..

The following enhancement has been applied to the standard version with the Images Supplement::

Images – Save Camera Settings

When your camera provides for settings, you can click Save to retain them for subsequent use.

The following enhancement has been applied to DQBT Tablet Workflow App. Note that this update requires a separate installation. If you have licensed this module, please call to schedule a time.

Material Disclosure

A Material Disclosure button has been added so the technician can update the actual material used as the case progresses. This button along with Technician Notes is purple to indicate that the technician is permitted to enter information.