

DentaLab for QuickBooks
2015 Release XLIV-000 October

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2015 Release XLIV in October 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. This release also includes two enhancements to DentalRx.

Standard Enhancements Applied to Starter Version

The following enhancements from earlier releases of the standard system have now been applied to the starter version:

Easier trial extensions
Close all windows button
Export case list to Excel
Cases locked information

Basic Lists – Standard Procedure Item Selection

This new control assures that the selection list for items is in alphabetical order when entering or editing a standard procedure. This has been applied to both the standard and starter versions..

Basic Lists – Tooth Shades

You can now mark an entry in your Basic Lists Tooth Shades table as active or inactive and whether or not available for use in DentalRx.

Custom shades entered into the table when in Case Entry will be initially set to active and not available to DentalRx. You can go to Basic Lists for Tooth Shades to change these settings.

From the Actions menu on this screen, you can also elect to print a list of your Tooth Shades.

Cases Menu: Fast Track to Case by Number

To the right of Cases in the main menu, you can now simply enter a case number to directly access the case record rather than going through the case list with its search criteria.

Cases Menu: Case ItemsSorted

This is a new report for a Case Items Sorted list that can be found in the Cases menu. The report will be based on a range of scheduled dates for case items selected from two calendars. You will also select either the default product group with all items or another one of your product groups. The report will list each item within the product group with these columns:

Scheduled Date
Case #
Customer
Patient
Pan
Shade
Short Memo
Qty

The default sort within each item will be by scheduled date. You will be given an option to sort within each item by one of the other fields, except for Qty.: A subtitle will show the sort field. A total of the Qty column will be displayed for each item.

Cases Entry: Change Doctor Alert

This is a new option to create a customer alert when changing the customer for a case. The alert will be for the latest customer selected and the user will be able to enter an alert message.

Options: Case Setting to Require at Least One Case Item

In the section to mark disabled/required case fields, we have added Case Item to require entry of at least one case item.

Options: Case Setting to Extend Patient Name Search to Open Cases

For the option to search for a matching patient name in Pre-booked, On Hold and Out for Try-in cases, we have added an indicator to also search Open/In Lab cases for the match when entering a new case. If found, the user will have the option to use the case or continue on to create a new case.

Options: New Invoice Setting to Automatically Print a QC form

We currently have invoice settings to automatically print a label with each invoice and to print a case materials disclosure form with each invoice.

This new option provides for printing a QC form to correspond to the invoice. This can be the standard form or a custom form.

Options: New Invoice Setting to Automatically Mark Case as Shipped when Invoiced

If you wish to have your cases marked as shipped when they are invoiced, in Options/Invoice Settings you can set a new indicator for this.

Note that if this option is set on, the shipped date and time will be automatically be set to the invoiced date and time. The ship method will be the one recorded in the case record. If you wish to have more detailed information on shipments such as the tracking number and/or whether quality control was passed, we recommend that you instead use the QC and Ship option.

DentalRx- Limit Shade Selection List

For selection of a shade by the dental office when entering an online prescription, you can now limit which shades are available to DentalRx by setting an indicator for the shade in Basic Lists-Tooth Shades. DentalRx will not check this indicator to determine whether to include a shade in its selection list.

DentalRx- Sending Images and Documents

Previously in DentalRx, the dental office could send images, files and documents via the Pictures option. DQB would then determine whether to send the transmission to the Images or the Documents storage area for the case by the file extension. To make it better understood that a large variety of files could be sent with a case, this button will be replaced by two separate buttons, one of Images and another for Documents with guidance as follows:

Images will include those with photographic extensions such as JPG.

Documents will include all other industry-standard formats defined by extensions such as .DOC, PDF, STL, XLS, XML.