DentaLab for QuickBooks
2017 Release LII-000 October
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This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2017 Release LII (1.52) in October on requests and suggestions from users of the system as well as the technical support staff.

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

Credit Memos for Cases in DQB

Previously, if you wished to generate a credit memo, this had to be done in QuickBooks. Now, from the Case List or Case Entry menu, you can create a credit memo for the case. The system will first develop the credit memo in the same manner as it would an invoice. You can then edit this to change items, quantities and amounts. You can also add a message.

When ready, the credit memo is created in QuickBooks, added to the Invoice History table for the case, noted in Case Activities. You can choose to view/print the credit memo in QB or DQB.

You can request customization of the credit memo format to be printed in DQB.

Customer Contact Preference and Information

A new field has been added to the customer record for Contact Preference. It can hold up to 50 characters of text for you to record how each customer likes to be contacted. Some examples could be:

- Phone only
- Email or phone
- Available for calls 11:30 to Noon

Entry/edit of this field is available in Basic Lists-Customers and Customer Center screens.

In Case Entry screen, in the Hide/Show frame for customer information, this field will be displayed along with the. Also include full set of contact fields; telephone number, fax number, email address.

Contact Preference will also be in the Customer Profile report.

Enhanced Reporting by Rep

In the Sales Analysis by Rep, there are now MTD and YTD counts for customers and for invoices for each rep. If the report includes all reps, these counts will be shown for the total report.

For Basic Lists-Customer Group, the selection grid now shows a column for Rep. This will provide an easier way to select customers to create a customer group for a specific rep. Once this is done, you can generate Production and Sales Analysis reports specifically for the customer group. When creating a group for new customers by date, you will be able to see which rep added each new customer.

The following enhancements have been applied only to the standard version:

Activity Logs Query and Report

A new menu option called Activity Logs has been added to the Daily section of Reports. This will provide an additional way to track follow-ups needed on specific day or range.

The Activity Log query and report that has been available for one customer in the Customer Center has been adapted for reporting on all customers by either the enter or alert date range. The report has been enhanced to show more contact information and the full memo.

Technician Productivity Reports – New Option

In Options/Case Settings/Technician tab, there is a new option to multiply the units and amounts in the Technician Productivity reports by the schedule factor. The default is OFF. If you wish, you can run these reports with or without multiplying by the item schedule factor by turning the option on and off. For those licensed for Technician Productivity, the three reports are:

1. **Technician Productivity -** comprehensive set of information for technician, case, item, completions, pay rates with calculation of incentive or piece rate pay.
2. **Technician Quick -** condensed version of the above for a shorter report
3. **Technician Quality Control -** this set focuses on quality control issues involved with completed work.