

DentaLab for QuickBooks

Release 1.56 List for October 2018

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in the 2018 October Release 1.56 based on requests and suggestions from users of the system as well as the technical support staff.

Case List: Prescribing Doctor Column and Search

The Prescribing Doctor field was added to Case Entry in DQB 1.55. This update adds this field to the Customize Columns action and the search criteria in Case List.

Case List: Invoice Time – Record and Display

The time will automatically be shown with the invoice date for future invoices. This will not need a setting.

Case List: Show Credit Memo Date Separately

We have added an option in the Customize Columns actions to show the Credit Memo Date in the Case List. The time will also be shown for future credit memos. The Invoiced Date will reflect the latest date and time an invoice was created.

Case Entry: Action List to Match Case List Actions

The action menu in Case Entry was updated to have the same options available in Case List for the selected case.

Case Entry: Option to Use Only Critical Dates

We recommend automatic scheduling of case item because it assures proper dates, checks workloads, and shows in graphic calendars. Using only the critical dates at the top of the screen could, however, be appropriate if sending to outsource locations.

Now in Case Entry, you can set an indicator to not display an alert if the case items are not scheduled. Once this indicator is set ON, it will remain On through subsequent cases until the user turns it OFF.

Cases Not Returned – Query with Option to Mark Finished

In the Cases menu is a new option to request cases that have been on hold or out for try-in more than a specified number of days. From the grid, you can select all cases or checkmark specific cases to mark them as Finished so that they no longer appear in reports for these case statuses.

In addition, each selected case has CASE NOT RETURNED added to the short memo field.

Basic Lists – Print Customer Preference Lists

The option to print the Customer Preference list is available in Basic Lists-Print Lists. We have added an indicator to exclude customers that do not have preferences. The options now provide for generating this list for one customer, all customers, all who have preferences.

For all preference lists and the customer profile, we have added general preferences at the top.

Reports: Condensed Version of Pickup/Delivery Report.

To provide for a more condensed report, there is now an option to exclude customer address. In addition, the Office Closed field has been moved up adjacent to the customer name and telephone.

Reports: Sales Analysis by Sales Category- Added Report Totals

This report includes sales totals by customer for items assigned to a sales category. We have added report totals for count and dollar columns.

Reports – More email capabilities

This expands the number of reports available for direct emailing to the customer, using the selected email template in the Report Templates tab of Options/Email Settings.

Preferences for one customer

Invoice Register for one customer

Invoice for customer printed in DQB

All reports in Customer Center, adding Invoice Register for one customer.

.....