

DentaLab for QuickBooks Release 1.64 October 2020

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in the 2020 October Release 1.64 based on requests and suggestions from users of the system as well as the technical support staff.

Important Microsoft .NET Framework Advance

The Microsoft .Net Framework provides the software support for the various functions of the Microsoft operating systems such as coordination with manufacturer controls for printers and other devices, user access and control, internet services, security measures. We have advanced the DentaLab systems beginning with DQB 1.58 to the latest version to provide better performance, reliability and security.

For the web-based features of DQB and its supplements, we continually advance the internet security measures to the latest industry standards.

NOTE: The following option is available only in the standard version of DQB:

DQB Case Entry: Prior Search/QC Edit/Start New Case

We currently have capabilities in Case List and Entry to search for prior cases by Customer and Patient, then go to the case to edit, lookup invoice history. We have been asked to expand these capabilities to provide for:

1. Easier ways to search for the patient should there be question on spelling.
2. List matching case(s), then select mark quality control issues when the case is returned to the lab and becomes a remake case.
3. Easily create the new case with information transferred from prior case
4. .Record prior case # when the new case is created to show succession

A new option Prior Search/QC Edit has been added to the Cases menu. Access is limited to manager and case entry levels but may be expanded in Custom security setups..

You will first select the customer from the standard Customer List. The basic customer information such as name, shipping address, main phone and email will be shown at the top of the next screen.

You can next set indicators and calendars to limit the search:

- Limit search to cases entered [date] to [date]
- Limit search to cases invoiced [date] to [date]

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Next you can enter a partial or full patient name and elect to match from the beginning or match anywhere. The program will show all matches for the customer + patient. To help you pinpoint the case, the grid will show the case number, status, date entered, date invoiced, tooth numbers, shade, qc by, times reschedules, remake indicator and remake/qc reason.

If you select a case from the grid, the program will show the case items with item name, standard procedure, qty, date scheduled, date completed and give you an opportunity to select the technician and qc issue. Next you can elect to start a new cloned case and indicate whether to transfer the prior case items and enclosures.

If you start a new case, the customer, patient, tooth numbers and shade will be transferred and the remake indicator will initially be set on. If elected, the prior case items and enclosures will also be transferred. You may overwrite any of these fields, enter the remaining fields, and schedule the new case.

The prior case number will be recorded and shown in the new case. It will be available in the Customize Columns action menu to show in the Case List and included in the Case History.

NOTE: The following options are available in both the starter and standard versions of DQB:

DQB Case Entry – Expansion of Case Notes

In the Case Notes field of Case Entry, you can now enter up to 32768 characters. The number of characters you have entered will be shown beneath the field. This change has been applied to standard case entry, outsourced case entry and prebooked case entry.

The full set of case notes you have entered will also be shown in Case History and the seven standard work tickets. If you have a custom work ticket and would like to have it include the expansion, please contact us.

If you need more than the 32768 characters for a specific case, we recommend that you go to the Case Plan tab in Case Entry. This field has been designated as a memo field, which means it has no limit. Case Plans can be output to a printer or one of the industry standard formats such as PDF.

DQB Case Entry and Schedule Pickup – Expansion of Customer Information Window

This new feature was added to provide a way to show the open hours for the dental offices as many have adopted new schedules in response to the pandemic. To expedite this, we are making use of the Custom Fields for the customer that already exist.

You have 10 of these that can be used for any custom purpose, each one can contain up to 50 characters and you set up a prompt to show the name/description of each. Example:

Office Hours Mon,Tue 8:00 – 4:00 Thurs 8:00 – 7:00 Fri 8:00 – Noon
Weekend Hours 8:00 – 2:00 Second Sat of Month

The Doctor Information window available during Case Entry has been expanded to show the Custom Fields for the customer that have an entry.

The Schedule Pickups screen now has a button to Show Doctor Information.

DQB Outsource Item Lists in Basic Lists and New Outsource Case

We have had several requests to provide for selection of multiple items when entering an outsource case, similar to the way this can be done with standard procedures in the case entry. To provide for this, we have added to Basic Lists an option called Outsource Item Lists. Here you name the list and then select the items to be included.

Then in New Outsource Case, you can select from the lists as well as enter items one by one. You will be able to edit the item list.