

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) and DentalRx in the 2021 October Release 1.68 based on requests and suggestions from users of the system as well as the technical support staff.

### **DQB and DentalRx: Fundamentals for Compatibility and Security**

To maintain compatibility with the latest software from the major providers such as Microsoft for Windows 11 and the .Net Framework and Intuit for QuickBooks, we have applied the technical changes required.

In addition, there are continual upgrades to internet security measures that are needed to guard against theft of information, ransomware, and other dangers.

### **DQB Advanced Installer**

For installation of both the licensed versions of our software and trials/demos, we now have a new utility called Advanced Installer. This tool has been designed to handle conflicts with other SQL based software for installation of the SQL database and to provide timely messages to you from our servers whenever needed.

### **DQB Master/Weekly/Daily Schedules: Mark Technician, Completion Time**

The DQB Master and Weekly Schedules work with graphic calendars to review and update schedules. The Daily Schedule works with pane technology for the same purposes.

For all of these schedules, the user can now mark completions of case items with the technician, completion date and time. This information will be available in the case item grids of Case Entry as well as the schedules.

Note that the alternate methods of marking completions such as barcode scanning and the tablet workflow app continue to be available.

### **DQB Reports/Cases By: Add Columns**

In the DQB Reports/Cases By set,, these columns were added:

Cases On Hold Report– Patient Name and Case Status (to distinguish between On Hold and Out for Try-In)

Work In Progress Report - Patient Name

### **DQB Case Entry: To Identify Required Fields**

In Options/Case Settings you can indicate which case fields are required.

In Case Entry, these fields are now identified by placing a red asterisk to the left of each field name.

NOTE: The case entry fields marked as Disabled in Options/Case Settings are grayed out so that information cannot be entered.

### **DQB Options/Users & Security: Add Individual Email Authorizations**

You now have the option to authorize individual login users to send email messages for cases and customers. Below the entry for user name, login and password is an optional section to fill if you want to give this authorization.

Optional: If this user is authorized to send emails for cases and customers, complete this section.

You will be given a choice of the default email settings for the lab (entered in Options/Email Settings) or the user-authorized email at all points involving sending emails for cases or customers:

Case Entry  
Basic Lists-Customers  
Customer Center

NOTE: This feature is not applicable to the DQB Notifications Supplement.

### **DQB Individual Case QC and Ship Action**

Currently we have a QC and Ship option in the action menu for an individual case as well as in the Case Entry screen. To mark the case as actually shipped, the user would scan the case number barcode from the work ticket.

For those not scanning barcodes, we have added the capability to do this from the screen. If the case already has an actual shipped date/time, this will be shown to the user with the option to update it to the current date/time.

### **DQB Case Entry – New Choices for Patient Matching**

The primary purpose of the Prior Patient Search has been to prevent duplicate entries for the same case. We have found that labs are also using this feature rather than the Case List to find cases by doctor + patient.

In Options/Case Settings, you can indicate which case statuses are to be considered for the patient matching (On Hold, Out for Try-in, Pre-booked, Open/In Lab). You can indicate whether the Enter Date and Start Date is to be set to the current date upon reactivation. You can also specify that the Start Date is to be one workday after Enter Date.

In Case Entry/New Case, when a patient match is selected, the user now be given these choices:

- View/Edit - the user determines all the next steps for selected case
- Reactivate – this will set the status to Open/In Lab for selected case, check option to determine if Enter and Start dates to be set, and add to times rescheduled.

In summary, we now have multiple options to search for a prior patient:

1. Case List, find by entry of patient name in criteria. You can also limit the search to doctor + patient.
2. Options/Case Settings for automatic patient matching primarily to avoid duplicates in Case Entry
3. Case Entry button for Patient Search
4. Cases/Prior Search/QC Edit primarily for continuation cases

### **DQB Invoice Settings: Add Alerts Tab, Corresponding Invoice Options**

Currently there are a number of potential alert messages that can occur when invoicing a single case. It is in DQB Options/Invoice Settings that you indicate your choices.

You can set the default case status but also indicate you want to have the option to change the case status. You can also set an indicator to limit overwriting an invoice to the same day. We have added an Alerts tab to include these options:

- Do not show an alert for case items not yet scheduled.
- Do not show an alert for case items not yet completed.
- Automatically mark all case items completed when invoiced with invoice date/time.