

**DentaLab for QuickBooks
2015 Release XLII-000 April**

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2015 Release XLI I in April on requests and suggestions from users of the system as well as the technical support staff.

Option to Load MSSSI Connector

In the Options/QB Synchronization screen, there is a new button to load the MSSSI connector that is used to transfer information between DQB and QuickBooks.

This is available to all security levels.

Case Item Custom Field to Invoice

In Invoice Settings, the user can specify up to two of the custom item fields to be available for the Other1 and Other2 fields in the QB template. The standard DQB invoice template will follow this setting to also print one or both of these custom fields on the invoices printed in DQB.

Export Case List to Excel

From your case list, the selected cases can be exported to an Excel worksheet. You can request this by first right-clicking on the list, then choosing to Export Case List to Excel. The cases will be transferred in the same sequence and for the same selections you currently have in the case list. You will be asked to enter a unique name for the Excel file.

Flow Charts for Daily Case Production, Setups and Scheduling

In the Main Menu, there is a new option for Flow Charts. Next you can choose Daily Case Production or Setups and Scheduling. The flow charts provide buttons to access the entry screens and guides to provide information on each step in the process. Buttons not available to the Starter version will be marked with a red X.

You can also CTRL/Click at each step to directly access the related topic in the Help user manual.

We particularly recommend use of these for new/novice users and those who want to gain a better understanding of the workflow.

Option Screens

The option screens have been enlarged to accommodate the increased number of settings you have to personalize the system for your lab. In addition, some screens have been divided into more sections with titles and additions to the text to provide more information on settings.

Price Level Assignments

When you choose a specific price level, to the right of the screen will be two new frames, the top one to show which customers have been assigned to the price level, the bottom one to show which customers have not been assigned to a price level.

You can select a customer from the bottom frame and then use the **Add** button to transfer it to the top list of assigned customers. You can select a customer from the top assigned list and then use the **Remove** button to transfer it to the bottom list of customers without a price list assignment.

Option to Sort for Cases by Date and Status Report

At the top of the screen where you choose the criteria for the Cases by Date and Status Report, you can now choose to sort within the date and status by one of ten case fields for the report.

Add Custom Reports to Backup/Restore

If a lab has requested customization of one or more of the standard reports, the custom version(s) will be stored in the DQBData/CustomReports folder. This contents of this folder will now be included in the standard Backup/Restore process.

Add Planned Ship Date to Notifications Open Cases Report

For those licensed for the Notifications supplement, the standard report for open cases will have a new Due Out column showing the planned Ship Date.

Store Images/Documents for Customer

For those licensed for the Images supplement, in the Customer Center you can scan, photograph and browse images and documents at the customer level, following the same patterns we already have in Case Entry. You will need to enter a name for each image or document up to 30 characters. The Index for each will be the customer, date/time and the name.

You can then select stored images and documents for viewing from a grid.

If selected, the images and documents will be included in the standard backup/restore procedures.

We strongly recommend that you do not include case images and documents at the customer level. Use the options in Case Entry for these.