DentaLab for QuickBooks
2013 Release XXXV-000 July
****

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2013 Release XXXV in July on requests and suggestions from users of the system as well as the technical support staff. These will be applied only to the standard version unless otherwise indicated. Here is a summary list:

Invoice History Tracking in DQB

Originally in DQB, the QuickBooks invoice could be created from the DQB case information but the subsequent actions were all located in QuickBooks. Gradually more and more options related to invoicing were added to DQB at the requests of users to provide for the special requirements of dental labs.

In this release each invoice transaction transferred to QuickBooks will also be recorded in the DQB database to provide:

1. Invoice history lookup in DQB when invoicing multi-stage cases
2. A comparison to the corresponding invoice in QuickBooks to determine if the total amount has been changed in QuickBooks
3. More specific sales reporting in DQB for multi-stage cases
4. Invoice history in DQB when reviewing a case

New Report: Special Items in Cases

This new report has been designed to track supply fulfillment items such as case boxes, prescriptions pads, etc., but may be used for any items. The user will first create a product group for the items to be included. If the items are not to be included in the invoice, they should be marked in Basic Lists/Items as not billable.

A new option in Cases menu for Special Items in Cases that will generate a list by entry date range showing the cases for which the items in the specified product group will be needed by their completion date and a total count for each item.

Within each item, the cases will be in descending order by entered date, case number.

New Case: Change Status

For new and prebooked cases, while entering the case you will be able to change the status to one of these three options: Open/In Lab, Prebooked, On Hold. This selection box will be in the General tab, right side of screen. If you elect to place the case On Hold, you will not be able to schedule the case items.

New Report: QC Analysis by Issue, Case

A new report to provide Quality Control Analysis by Issue and Case has been added to the Reports/Quality Control Analysis set. This report will be based on the entries made in QC and Ship at the case level for the actual ship date range..

The report will be grouped by Issue from Basic List/QC Issues/Reasons with a total case count for each issue. The fields included are: Case #, Customer Name, Patient Name, QC By, Actual Ship Date, QC Passed, QC Description

A total Case Count will be provided for each issue.

New Report: All Customer Profiles

This is a report patterned after the customer profile for a single customer, but this includes a profile for every customer. A new page will be started for each customer. This will be available from the Actions menu for Customer List and from Reports/Customer Profiles.

New Report: Sales for Specific Item

In Reports/Sales Analysis, there are several categories that generate a sales report for all items for a specific rep, customer group, etc. We have added selection for one specific item to provide reporting on all the customers who have had sales of the item in the date range selected.

Mailing List based on Customer Activity

In Reports/Customer Activity, there is a new option to generate a mailing list based on selecting customers that have or have not sent in a case in the selected date range. The field used to determine this is the case entered/received date. First the report will be displayed on the screen. The user has the option to print or to save to a variety of formats. For mailing labels, it is recommended that the save be to Microsoft Excel or Word due to their built-in facilities for mailing labels.

The customer fields available in the mailing list will be:
Customer Name
Billing Address
Rep
Last Active Date

We have also developed a separate guide to create the mailing labels that will be available upon request.

New Option to Check Price Level in Case Entry

In order to enable this feature a checkbox has been added to the Case Settings options screen to check if you want the system to determine if each item added to the case for a customer has a price level assignment. Note: Once an administrator checks this feature, all client DentaLab computers will be set this way.

If this option is set, when adding items to a case DentaLab will check if the item is currently within the price level list associated with the customer. If the item is not within that list, it will prompt the user to add the item to the current customer price level list. If will also ask the user to set the price for the item within the price level list.