DentaLab for QuickBooks
2010 Release XXI-000 January
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OVERVIEW

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2010 Release *XXI*-000 in January based 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:

Pan Code in Schedule Reports

- Added pan code to all of the schedule reports in the second tab of Report Center. The revised reports have been added to both the starter and standard versions of DQB.

Pan Code Option for QB Statements

- In Options, Invoice Settings, an indicator has been added to determine if the pan code is to be added to the invoice memo field in addition to the patient name. This will then show on the QB statement for each invoice transaction line. The default setting will be off (no). If this indicator is set to on (yes), upon invoice creation, the system will append to the patient name now in the invoice memo field one space plus the pan code.

Lab Notes for Invoice Message

- We current provide for creating and accessing standard Lab Notes in several areas such as Doctor Preferences, Case Memo, Case Plans. We now provide this same capability for the Invoice Message box in the Invoice screen. This is initially being done to provide for choosing from 4 messages that Texas labs are required to add to their invoices to indicate where the case was made. We anticipate this feature will also be used for other purposes.

Customer Profile Report

- This is a new report to provide a comprehensive customer profile. A new button in Basic Lists-Customers labeled Print Customer Profile can be clicked to first show and then print this report. The previous Print button has been changed to say Print Price Level.

Case List Search Results – Next/Previous Buttons

- If the user has used one of the Find options to search the case list, the Case detail screen will now show Next and Previous buttons to allow for easy browsing to find the specific case.

Case Deletions

- Previously, when a user requested and confirmed deletion of a case, the case along with all of its sub-records was removed from the database. If deleted, the case header records and case item records will be moved to separate tables specifically to hold the deletions. The computer name, user, date, time and reason will be added to the deleted case header record.

- If the deletion request is for a case that has been already been invoiced or used for tracking technician productivity, a message will be displayed and manager level authorization will be needed to delete the case.

- In the upper level quadrant of the Home Page of the standard system will be a new button named Deleted Cases. From this, the user can specify a case entry or deleted date range, a specific doctor and patient to find deleted cases. These will be shown in a grid. The above added fields will be shown in the details. An option to reactivate the case will be provided. If this option is chosen, the case and case items will be moved from the deleted tables back to the active tables so that the case can be rescheduled.

Error Reporting

- When error messages for situations other than data edits are displayed, the user will have the option to have the complete error message transferred directly to the DentaLab Support Team at Mainstreet Systems rather than having to copy it into the Windows clipboard and then paste into a separate message to be sent via email.