

DentaLab for QuickBooks
2012 Release XXIX-000 January

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2012 Release XXIX.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:

Case Communications Entry and Report

In Case Entry and Customer Center, the user will be able to record the date and notes of each communication concerning a case, along with the identity of the persons involved. The communication can be in any of a number of venues such as telephone calls, in-person visits, emails, correspondence.

There is no limit to the number of communications that can be recorded in the log for each case number. A printed report of communications for a case may be generated.

Sales Categories Entry and Reports

The Sales Categories will provide another way to categorize each item involved in a case so that these can be reported for counts and dollars in invoices, adjustments and remakes. The Sales Analysis by Sales Category reports for a specified date range or for year-to-date (YTD) may be requested from Reports-Sales Analysis or from Customer Center-Reports.

Each item can be assigned to only one Sales Category. This can be performed from Basic Lists-Sales Categories or from Basic Lists-Items. Some sample Sales Categories:

- Crowns
- Dentures
- Ortho
- Partial

Items not assigned to a specific Sales Category will be included in the reports as Unassigned.

Customer Lists – New Search Categories

New search criteria have been added to help find a specific customer:

- telephone number
- contact name
- city
- state
- postal/zip code
- rep/salesperson
- email

When there are multiple matches, a second grid would be displayed for further selection. The user will next select/confirm the customer choice.

These search criteria will be available in Basic Lists-Customer, Case Entry, and the Customer Center – Find Customer.

Note that if custom columns are specified for the customer lists involved in Basic Lists and Case Entry, these will be applied to all lists in these areas. If custom columns are specified for the Customer Center-Find Customer list, this will be applied only to this list.

Expanded Customer Center

The Customer Center has been expanded to include two ways to focus on customer profiles and activities for marketing, business development and customer service: 1) by specific customer and 2) by date/date range.

In addition, the Customer Center also includes setting up schedules for the Notifications supplement and a link to the Spreading the News supplement for email newsletters and promotions.

Find Customer

One way is to find and focus on a specific customer by using the Customer List through its alphabetic index, traditional and new search criteria, or by clicking column headings to sequence the list in various ways.

Once selected/confirmed, the basic customer information (account, name, address, telephone, email, fax, contact, rep, price levels, etc.) would be shown with tabs or links to various information specific to the customer:

Activity Logs

Alerts

Cases

Case Communications

Notifications

Preferences by Work Center

Preferences by Item

Reports

Schedule Pickup

Expanded Customer Center Reports

Case Reports for selected customer and specified date range:

- All Cases Received
- Open/In Lab Cases
- On-Hold Cases
- Out-for-Tryin Cases
- Invoiced Cases
- Shipped Cases
- Cases Due in Requested Date Range
- Cases Due in Scheduled Completion
- Cases for Specific Patient
- Case History

Customer Analysis Reports for selected customer:

- Customer Sales Analysis by Item by date range or YTD
- Customer Sales Analysis by Sales Category by date range or YTD
- Customer Remake Report by date range
- Customer Profile

Find Date

The other way is to focus on a specific date or date range to generate grids of customer activities, alerts, cases and/or case communications.

A variety of dates/ date ranges can be selected with further browsing capability such as:

Today	Two days	Three days
Week	Two Weeks	Three Weeks
Month	Two months	Quarter
MTD	YTD	

The system will display tabs with headers followed by record counts for:

Activity Logs
Alerts
Cases
Case Communications

You can click each tab to display a grid of the search results. Initially, the records will be sequenced from latest to oldest, but you may click the column headings to re-sort by any column. You may also edit the records.

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Notifications

For those who have licensed the Email Notifications supplement, here you can setup schedules for email notifications as well as view, edit, delete, suspend, reactivate, send now, generate a log of sent notifications or a report of customer assignments.

Spreading the News

For those who have licensed the Spreading the News supplement, this provides a link to this system for synchronizing QuickBooks email addresses, adding other email addresses, setting up groups, assigning prospects and customers to groups, setting up and sending email newsletters and promotions, keeping logs of these activities.