DentaLab for QuickBooks
2014 Release XXXVII-000 January
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This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2014 Release XXXVII in January 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:

Action Required: Follow up and Reporting

To monitor the action required messages sent to dental offices in email notifications, the following capabilities have been added:

In Case Entry, the Action Required tab now provides for a follow up entry to record the date, entry by and a follow up memo.

In Reports – Action Required provides for reporting on entries and follow ups by the cases shipped date range.

In Reports – Cases Shipped, if an action required entry has been made for the case, it will be included in this report.

Create Standard Procedure from Item

From Basic Lists – Items, you can select an item and then request an action to create a standard procedure based on the item.   An item selection list will be provided for easy checking of which items are to be included in the standard procedure.   A window will next be displayed with the tentative procedure and here you can edit and re-arrange the sequence of the items as needed.

Cross-Reference Items to Standard Procedures

From Basic Lists- Items, you can request from the actions list a report for one selected item to see which standard procedures include the item.   You can also request a cross-reference report for all items to see which standard procedures include each item.   Each report will first be displayed and you can then request that it be printed.

Case Alert from Case Item Grid – Schedule Limits Exceeded

When editing an item from the case item grid, the system will now check to determine whether the schedule units for the item will cause the limits for the work center and date to be exceeded and issue an advance alert. You can then determine whether to continue editing or to allow the schedule limits to be exceeded.

Case Vendor Information without Purchase Order
In Case Entry, the entries for Vendor and Vendor Return Date in the Purchase Order were recorded only when the purchase order was created in QuickBooks.

We are now recording these in the main case record for those who want to show these fields in the Case List without creating a purchase order. From the Case List actions menu, you can select Customize Columns and check vendor and vendor return date.

Users/Security Indicator to Prevent Access to Financial Analysis
For individual users at the Case Entry and Entry security levels, there is now an indicator to Prevent Access to Financial Analysis. The default is off, but the Manager level can set this indicator on to prevent access to:

Reports - Production Analysis set
Reports - Sales Analysis set
Graph Reports – Invoiced/Remake Summary
Customer Center – Sales Analysis by Item
Customer Center – Sales Analysis by Sales Category