

DentaLab for QuickBooks Release 1.57 January 2019

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in the 2019 January Release 1.57 based on requests and suggestions from users of the system as well as the technical support staff.

The following options are available in both the starter and standard versions:

Marking Case as Shipped in Case Entry

To date, the Cases/QC and Ship option provided for marking the actual date and time shipped as well as completion of quality control for a batch of selected cases. If available, the barcode on a shipment label from one of the major services could be scanned to record the tracking number.

This update provides for marking this for an individual case in Case Entry in these options:

- 1) From the action menu option QC and Ship in both the Case List and Case Entry.
- 2) From the button QC and Ship next to the entry field for the tracking number in Case Entry.

The Actual Shipped Date/Time will be set to the current date/time. For those services that provide online tracking, the specific pickup, transit and delivery will be available from their website.

Note that the Ship Date at top of Case Entry is the planned ship date. The Actual Shipped Date/Time is a separate field.

Add Case Barcode to Cases Shipped Report

We have added a barcode in 3 of 9 (also called 39) format for the case number to the Cases Shipped report.

Customers by Ship Method

In Basic Lists/Print Lists is a new option to List Customers by Ship Method. You can choose to list all ship methods or one ship method.

Case List: Convenient Reset for Criteria

In the Case List, you can find cases in a variety of ways, some simple, others with multiple criteria. We have added a convenient Reset button to completely clear the criteria from your prior search and give you a clean slate to enter your new criteria.

Options/Case Settings: More Fields to Disable/Require

In Options/Case Settings, we have added more case fields that can be either disabled or required:

Class (NOTE: Coordinate with use of classes in QuickBooks)
Adjustment Reason
Remake Reason
On Hold Reason

We have also added an option to hide Prescribing Doctor field. This field has primarily been used by those who have not set up jobs in QuickBooks for the individual doctors in a group.

Improved Patient Matching in Case Entry

In Options/Case Settings you can click on the indicator for: Prebooked/On Hold/Out for Try-In Patient Match. Show auto-complete matches under the patient name textbox when typing. You can also indicate that you want to search On Hold cases for the doctor with a matching patient name.

If the above are clicked on, once you enter 3 or more characters in the patient name field, the program will display a frame with cases that have one of the designated case statuses. The columns shown will help you to determine if you already have a case with a matching patient name:

- Case number
- Case Status
- Received Date
- Requested Date
- Patient
- Invoiced Date

If you determine that one of the cases matches the case at hand, you can choose to switch to it for the current case and continue on with your entry.

In Options/Case Settings, there is also an option to show a button for Prior Patient Search in case entry. If shown, you can click it to enter a full or partial patient name, then also choose whether to match from the beginning or anywhere in the name. The matching cases will be displayed.

- Patient Name
- Gender
- Case Number
- Pan Code
- Case Status
- Status Date

You can select a patient name to insert into the current case at hand.

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Invoice Register added to DQB Starter

The invoice register that has been available in the standard version has been added to the starter version. You can select one customer or all customers for a specified invoice date range.

The following option is available only in the standard version.

Transfer/Clone Customer Auxiliary Information from Another Account

This option is available from the top right of the Customer Center screen and has been designed particularly for doctors in dental groups to provide for transferring information from one doctor to another. You can choose to transfer:

- General preferences
- Preferences by work center
- Preferences by item
- Customer alerts
- Notifications schedules