

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in the 2021 January Release 1.65 based on requests and suggestions from users of the system as well as the technical support staff.

DQB Case Activities - Continuation Case Added

If a case has been continued for a doctor+ patient using the Prior Search QC Edit feature, the Case Activity set will now show: Case has been continued from prior case #____.

DQB Options/Case Settings – Prescribing Doctor and Pan in Use

The Prescribing Doctor field was added to Case Entry for those labs that were not following the recommended protocol to set up QB jobs for doctors within a group under the main QB billing customer. We have added a Case Setting in the Required/Disable tab for Prescribing Doctor so that you can choose to hide it.

You can also set on an indicator to check whether the pan code entered for a new case is for a pan already in use.

DQB Outsource Case Remake Indicator and Reason

A Remake indicator and selection of reason has been added in the left frame of New Outsource Case/Case Details.

These fields have also been added to the standard outsource work ticket.

DQB Backup Security Compliance Measures

To comply with current internet security standards, the standard DQB backup has added measures to guard against failures.

DQB Consolidated Invoice for Customer Group

A new menu option has been added to Cases/Completions called Print Consolidated Invoice. This will provide for generating a consolidated invoice that includes all invoices for a customer group in a specified range of invoice dates. The invoices must first be created in QuickBooks.

To generate a consolidated invoice, the user will first select a range of invoice dates from two calendars and then select a customer group. The

program will gather the invoices that meet the criteria and organize these into an invoice format on standard letter size paper. The selected invoices will first be shown in a grid.

The lab company name will be shown at the top, followed by the bill-to address from either the first invoice selected or a billing customer specified by the user. The invoice date will be the current date, the due date will be accessed from the first invoice or a specified case invoice. The user can choose to Show the consolidated invoice and/or Print it.

If the invoice requires multiple pages, the page number will be shown on the bottom. Each invoice will include a header line in bold showing the doctor, patient, case #, tooth #, shade, memo and date requested. The line items will show the quantity, item description, price and line amount. The total amount will be shown for each invoice.

NOTE: You can request customization for your consolidated invoice format.

At the conclusion of the consolidation, a total count of case invoices will be shown and a total amount for all invoices included.

DentalRx Pickup Request Email Alerts

As the administrator for DentalRx, you can indicate in your settings to send an email alert to up to 2 email addresses whenever a pickup request has been entered via DentalRx. The subject of the email will be Pickup request received via DentalRx. The message will include the customer name, address and telephone, the pickup request date/time and the memo field that typically includes the patient identification.

The pickup requests from DentalRx are also stored in DQB and available in Reports/Pickup and Delivery and in the Customer Center for a selected customer.