

**DentaLab for QuickBooks**  
**2014 Release XL-000 October**

\*\*\*\*\*

This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in 2014 Release XL in October on requests and suggestions from users of the system as well as the technical support staff.

**More Choices to Customize Columns for Customer List**

This expands the number of fields in the selection list to customize columns for the customer list. This will be helpful if a lab needs to make changes, check which customers are new, etc.

- Ship Method
- P.O.
- P.O. Expiration
- First Active
- Last Active
- Price Level
- Time Zone

Synchronized from QuickBooks:

- Type
- Active/Not Active

**Close All Windows**

This is a new button to close all windows. It is located at the bottom of the left menu frame in the standard version.

**For Images Supplement: Digital Photos from USB Camera or Webcam**

In addition to scanning case documents and browsing to add digital images sent by the dental offices, you can now use a USB camera or webcam to capture case-related photos and have them stored with the case.

This new feature was developed using the IPEVO Point 2 View USB camera, due to its affordability and resolution, as well as with standard webcams.

From the screen, you can also adjust camera features such as brightness, resolution. In conjunction with the introduction of this new feature, we have moved the Images selections within Options/Case Settings to a separate tab.

Available upon request with further details is a new white paper titled Images Supplement.

**For Images Supplement: Ability to Crop Images**

The WIA scanning feature has provided for auto-cropping. For those who prefer to do their own cropping, a new feature has been added to select, then crop and save an image. The user can choose whether to retain or delete the original image.

**Action Required Report**

The Action Required report currently requests a ship date range. To accommodate cases with an action required that are not yet shipping such as cases being placed on-hold, we have added the option of requesting this report by a range of the dates the actions were entered.

**Master Schedule Guidance to Change Daily Limits**

Although the Help guide says the limits per day can be edited from the master schedule screen, this was not obvious to a number of users. We have added text near the bottom left to let the user know how to not only view/edit the cases but also to change the daily limits.

**Menu Limited by User Roles**

This new feature is the next step for the user roles we introduced in an earlier release for the standard version of DQB. The menu will now be limited to correspond to the roles available to the logged-in user.

\*\*\*\*\*

**Custom Fields Analysis**

There are three types of records—cases, customers and items-- that provide for up to 10 custom fields each. From Reports/Custom Fields Analysis, the user can select:

- One of three tables – cases, customers or case items
- If cases or case items, a range of case entered dates from 2 calendars.

Next, the program would show the custom fields in use (up to 10) for the selected table and provide for checking which of these are to be reported.

The program will create a record for each unique entry in each selected custom field as it reviews the selected records to tally a count of its occurrences. Empty entries will be bypassed.

A total count of records with entries will be tallied. Then for each record, the program would calculate the percentage of its count within the total. Sample reporting:

**Custom Field Analysis for Cases Entered [date] to [date]**

<u>Custom Field</u>	<u>Count</u>	<u>% of Total</u>
Type of Denture		
Premium	325	32.5
Standard	675	67.5
Total	1000	100.0

**Custom Field Analysis for Customers**

<u>Custom Field</u>	<u>Count</u>	<u>% of Total</u>
Business Model		
Corporate	33	16.5
Hospital	12	6.0
Individual	96	48.0
Large Group 5+	34	17.0
Small Group <5	14	7.0
University	11	5.5
Total	200	100.0