This document reviews the significant enhancements to DentaLab for QuickBooks (DQB) in the 2023 October Release 1.75 based on requests and suggestions from users of the system as well as the technical support staff.

## DQB and DentaLRx:  Fundamentals for Compatibility and Security

To maintain compatibility with the latest software from the major providers such as Microsoft for Windows 11 and the .Net Framework and Intuit for QuickBooks, we have applied the technical changes required.

In addition, there are continual upgrades to internet security measures that are needed to guard against theft of information, ransomware, and other dangers.

## DQB Case Reports by Customer – Expand to Customer Groups

For this initial set of reports, we have added selection for customer group to the top criteria set:

**Cases by Date and Status:**
Below the selection for a single customer, we have added Select Customer Group.

This uses the same criteria and format as currently done for a single customer, but includes reporting for each customer in the selected group.

**Cases Shipped**:
The criteria section now includes selection for:
- Single Customer.
- Customer Group
- 

This uses the same criteria and format as currently done for a single customer, but includes cases for each customer in the selected group.

**Activity Logs:**
The criteria section now includes selection for:
- Single Customer.
- Customer Group.

This uses the same criteria and format as currently done for a single customer, but includes activity for each customer in the selected group.

## DQB Call Memo for Call List

Currently the Call List in the daily case reports set is based on checking the Call Doctor indicator during Case Entry.  This feature will provide for entry of a memo for the call and then showing this on the Call List.

**Database:** The Case Communication record will now include the Call Memo fields:

- entry date
- edit date
- entry by
- spoke to
- memo text

**Case Entry:** A button to the right of the Call Doctor indicator has been added:

  Add Memo for Call List

This will display a frame for entry with the format similar to entry for a Case Communication. The entry date will default to the case date but can be overwritten.

After the user clicks Add, save the record and return to the case entry process.

A reminder note has been added at the bottom of the frame:  To update this call memo, go to the Case Communications tab.

**Call List:**

The report currently shows just the Contact name.  We have added  the Customer Name and a slash in front of the Contact:   **Crossroads Dentistry/Sara**

The report is currently sorted by Case #.   We have added an option to sort by Customer.

Each Case Communication will include  the new fields for the Call Memo.   Sample:

**Memo:**  Entry 9/18/23  Edited 9/20/23  Entry By Sam  Contact Sara    discuss changing delivery to 9/28 by 3 PM.

Multiple case communications can be entered.