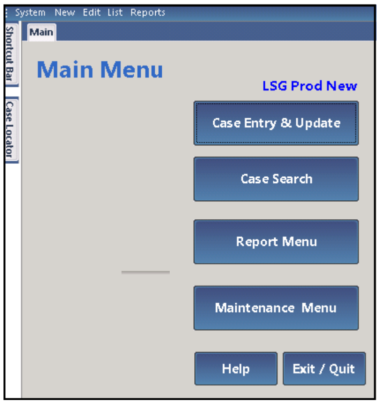
LabManager™ Version 7

Navigation Tools

The Easy Menu

Navigation Tools



The **Easy Menu** format is found on the **Main Menu** screen of **Lab Manager v7.**
It has the familiar look and feel of previous versions of Lab Manager.

Case Entry & Update Button: This is found at the **Main Menu** and will allow you to enter a new case.

Case Search Button: Click on this button to use the **Advanced Search** capabilities to find a case.

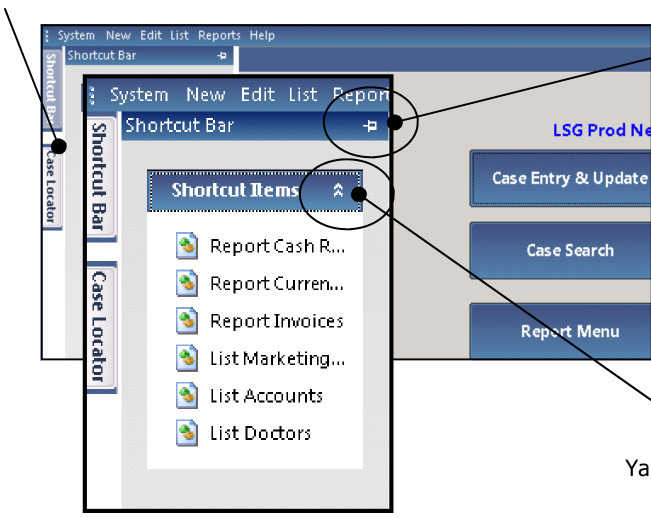
Report Menu Button: Click on this button to access reports.

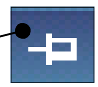
Maintenance Menu Button: Click on this button to access items like **Accounts, Doctors, Products,** etc.

Help Button: Click on this button to be directed to more information about the software.
Exit/Quit Button: Click on this button to close out of the program.

Shortcut Bar

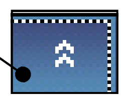
The Shortcut Bar creates direct links to most used reports and data entry screens. The bar slides out from the left when you hover your mouse over it.





The **STICK PIN** in the upper right corner of **BOTH** the **Shortcut Bar** and the **Case Locator Bar** is used to <u>lock</u> things to a certain place in the program.

- Clicking on the **STICK PIN** <u>locks the bar into place</u>.
- Clicking on the **STICK PIN** again <u>will unlock the bar and allow it to slide away when not in use</u>.
- If the **Shortcut Bar** ever gets closed or disappears for any reason, you can go to **System** at the top, **Control Panel**, and then the **Show All Dock Bars** OR bring the bar back by closing **Lab Manager** and then restarting it.
- When the **Shortcut Bar** is <u>locked open</u>, using the **Stick Pin**, **the bar can be dragged to another location of the program.**



Yahoo! Messenger.lnk

The DOUBLE ARROWS symbol controls viewing **Shortcut Items** list.

- DOUBLE ARROWS **<u>pointing up</u>**, **Shortcut Items** list **<u>appears</u>**.
- DOUBLE ARROWS **<u>pointing down</u>**, **Shortcut Items** list **<u>disappears</u>**.
- Clicking on the arrows toggles the **Shortcut Items** list between visible

Using the Shortcut Bar

1. Hover your mouse over the **Shortcut Bar** button and the slide out will appear.
2. Click on the report or item that you wish to view. If the item is not listed, see the instructions on **Editing the Shortcut Bar** (See below).
3. Move your mouse away from the **Shortcut Bar** and it will slide back to the left.

Editing the Shortcut Bar

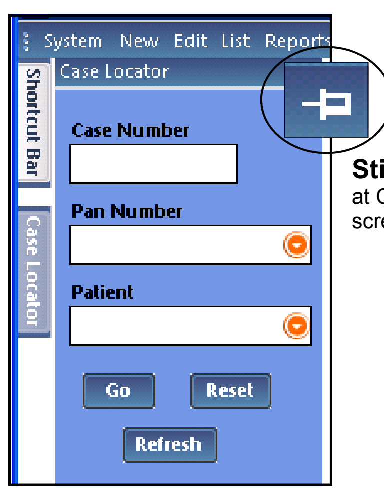
1. Hover your mouse over the **Shortcut Bar** button and the slide out will appear.
2. **Right** click in the white area on the **Shortcut Items**, and then click on **Manage Shortcut Items.**
3. At the **Edit Shortcut Bar Items** screen, check the boxes under the **Selected** column of items you want to appear on the **Shortcut Bar.**
4. Once all desired items have been selected, click **Save** at the bottom of the screen.
5. Click **Close** to exit the **Edit Shortcut Bar Items** screen.

Case Locator Bar

The Case Locator bar is used to quickly locate a specific case, by **Case Number, Pan Number or Patient** name for any cases not yet statemented.

Using the Case Locator

1. Hover your mouse over the **Case Locator** button and the slide out will appear.
2. There are **3 ways** to look for a case, choose one of the following:
   - Type in the **Case Number** with all the numbers and the dash. Example 1201-0001.
   - Type in the **Pan Number** or choose the pan number from the drop down list.
   - Type in the **Patient** name, or choose the name from the drop down list.
3. Click on **Go** to be taken to the case.
4. Click **Reset** if you want to clear the information on the screen and do a new search.
5. Click **Refresh,** if a user on a different workstation adds a case or updates an existing case, clicking the **Refresh** button will refresh it all to include that new/updated data.
6. Move your mouse away from the **Case Locator** and it will slide back to the left.



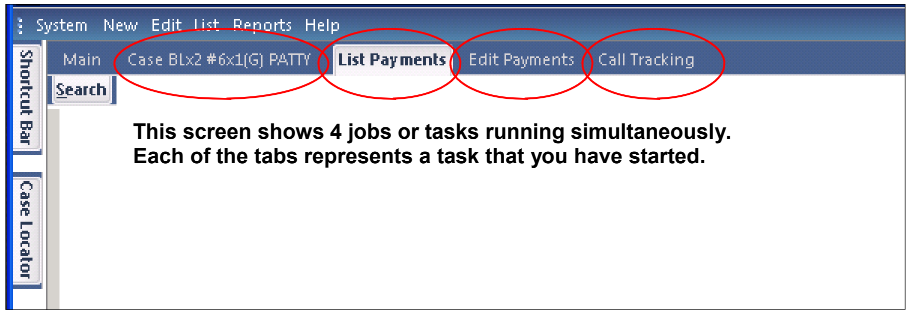
Stick Pin
at Case Locator screen

Multitasking

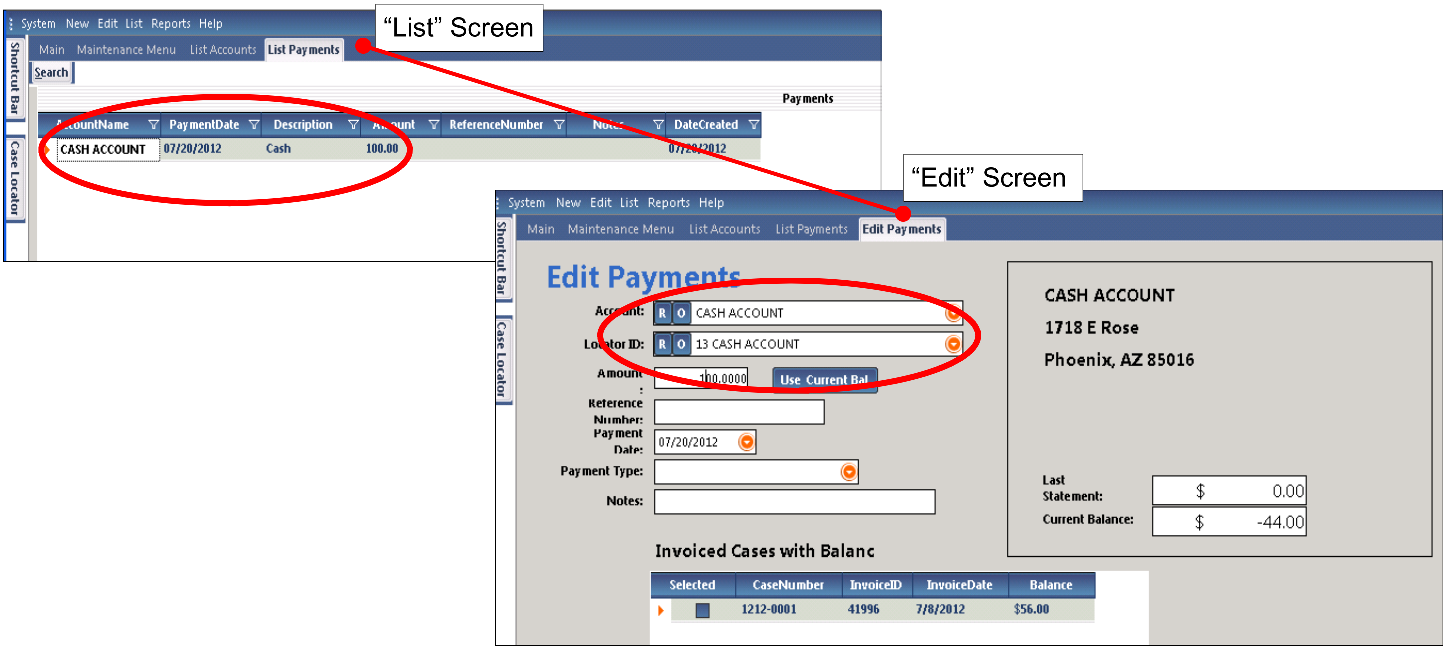
Perform multiple jobs or tasks simultaneously, without closing screens or exiting.

Example: You are logging in a case when the phone rings. The caller is a doctor who wants to pay their bill using a credit card. Without closing the case screen, using the menu bar at the top of the screen, click on **List,** then **Payments** and enter the payment. When you have finished entering the payment and saved, that task along with its tab will close. You can move from one task to another simply by clicking on the tabs running across the top of the screen.

NOTE: You can't close a "List" screen before you close the "Edit" screen tied to it.



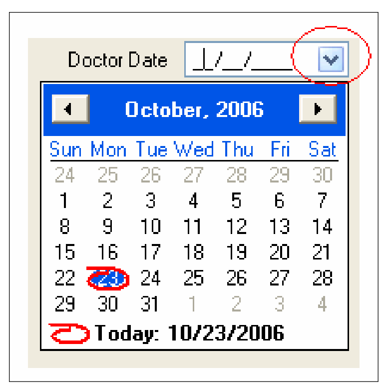
Example: In the screen image below, you can't close the **List Payments** tab before you close the **Edit Payments** tab. This is because the **Edit Payments** screen is getting its data from the **List Payments** screen. One is dependent upon the other. Therefore, if you have problems closing a screen, check to see that you don't have a dependant screen open.



Control Buttons

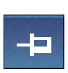
Menu Bar: The Menu Bar at the top of the screen can be accessed by pressing and releasing the ALT button and then pressing the letter that is underlined on the menu bar to open that menu. The arrow keys can also be used to access menu items once the Menu Bar is selected.

Buttons: Buttons on the screen can be pressed using the key board by holding down the **ALT** key while at the same time pressing the letter on the keyboard corresponding to the **underlined letter on the button**. For example, to save any changes you make to information on the screen, you can press **ALT** and **S** or you can simply click on the **Save Changes** button with the mouse.

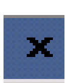


Bold Fields: When setting up accounts, products, materials, etc., it is important that you define the fields that are **BOLD**. The **BOLD** fields are required.

Date Fields: Throughout Lab Manager, you will find fields to enter dates into. Dates can be typed into the field using your keyboard or you can click on the drop down list button to the right of the date field to pop up a small calendar. The calendar can be used to select the date you want by simply clicking on it. Buttons are provided in the upper portion of the calendar to move forward and backward in time. Also, if you if you click on the Month you will get a list of months to choose from or if you click on the year, you will see buttons to increase or decrease the year.



Stick Pin: Clicking on the small **Stick Pin** in the upper right corner of the **Shortcut Bar or Case Locator,** will lock the bar into place. Clicking on the **Stick Pin** again will unlock the bar and allow it to slide away when not in use. If the **Shortcut** bar ever gets closed or disappears, you can go to **System, Control Panel and Show All Dock Bar** or bring the bar back by either closing Lab Manager and then restarting it. When the **Shortcut Bar** is locked open using the **Stick Pin**, the bar can be dragged to another location in the program.



Little Black X: The little black X toward the top right corner of **Lab Manager v7** will close the specific tab that is displayed.

Control Buttons

These control buttons are found throughout the program.

Add Button: This button can be used to add new items of this type to your list.

Add New: This button creates a new Account, Doctor, Product, Material, Case, etc.

Cancel: If you accidentally erase or change something on a screen, and if you haven't saved the accidental changes, just click the **Cancel** button to cancel the changes.

Clear Button: This will delete the information in the designated field.

Close: This button closes the screen. Changes made on the screen must be saved before closing the screen, or changes will be lost.

[ ] Close on Save or Cancel: A check mark here will automatically close the screen each time the **Save Changes** button is selected. Remove the check mark from this box and the screen will not close automatically until you close the screen and open it again later. The default setting for this function can be changed in the **Company Preferences and Settings** area.

DeInvoice: If an invoiced case needs to be modified, click on the **De-Invoice**. Make the changes to the case and then re-invoice it.

Design: This button creates a custom version of a report. The process is discussed in the **Custom Reports** section of the manual.

Export To PDF: Reports can be exported into PDFs to be saved on the computer or emailed to doctors. Click **Export To PDF** and save the file with a name and a location that can be found later.

Export To Excel: Export data to Microsoft Excel when creating custom reports and graphs of Lab Manager information. To export the data in a table or grid, simply click on the **Export To Excel** button at the bottom of the screen.

Find/Search: Located on the **Case Entry** screen, it directs the user to an advanced search screen to locate cases.

Go: When using **Edit** at the **Menu Bar.** The **Go** button activates the search process.

List Button: This button can be used to see a list of the existing items and to add new items.

Load Financial Data: Using the **QuickBooks Interface** payment totals can be transferred from **Lab Manager v7 to QuickBooks**.

Load Follow Ups: Use this button to load the marketing follow-up dates into the marketing calendar.

On Hold Button: Put accounts "on hold" and they will not show in the drop down lists on a case. Click the **On Hold** button in the drop down list to be able to choose a doctor from an account that is on hold.

Next: This button can be used to move forward through the records. **Example:** If you are on doctor number 3 of 4, the **Next** button will move you to the next doctor in the list.

New Product: To add products to the case, click on the **New Products** button on the left of the Products grid on a case (Alt+P)

New Material: To add Materials to the case, click on the **New Material** button on the left of the Materials grid on a case (Alt+M).

Preview: Use this button to view or preview the report. While previewing a report, zoom in on an image, move from page to page, print it using the **Print** button in the upper left screen, or even send the report to a different printer.

Previous: This button moves backwards through the records or to the previous "person or item" in a list.

Print: Use this button to send your report to the default printer in Windows.

Print Quote: This creates a printable quote instead of invoicing the case.

Quick Return: Use this button if a previously statemented case needs to be credited to the Account/Doctor. This button only allows an invoice to be refunded exactly as it was billed. This refund will be applied to the balance owed by that Account.

Refresh: If a user on a different workstation adds a case or updates an existing case, clicking the **Refresh** button will refresh it all to include that new/updated data.

Reset: Found in the search form. This will clear the search form back to defaults so a different search can be done.

Retired Button: Retired items are hidden in some lists and reports. To see retired items, click on the **Retired** button for them to be available in the drop down list.

Return: Use this button if a previously statemented case needs to be credited partially or in full to the doctor. This refund can be a partial of full refund. This refund will be applied to the balance owed by that Account.

Run Aging: Aging is done when **Statement Jobs** are created. If aging needs to be done outside of a normal statement job, click **Run Aging**. This is not normally recommended since it will issue service charges.

Save: This button will save the information you have entered or changed on a screen.

Save Changes: This button will save the information you have entered or changed on a screen.

Save and New: In **Case Entry** this saves the case, but does not invoice it. You are then presented with a new **Case Entry** screen where a new case can be entered.

Save New: This button will save the information you have entered or changed on the Screen.

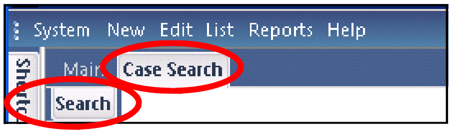
Schedule: This button is used to schedule the steps of the case. This feature is only available with the Scheduling Module.

Search: Once you have selected a field to search, a search function, and typed in what you are looking for, click on the **Search** button. Lab Manager v7 will then look for any matches and then display those matches in a table for you to review.

Transfer data: Using the QuickBooks Interface payment totals can be transferred from Lab Manager v7 to QuickBooks

Advanced Case Search

There are 2 ways to access the **Advanced Case Search**.



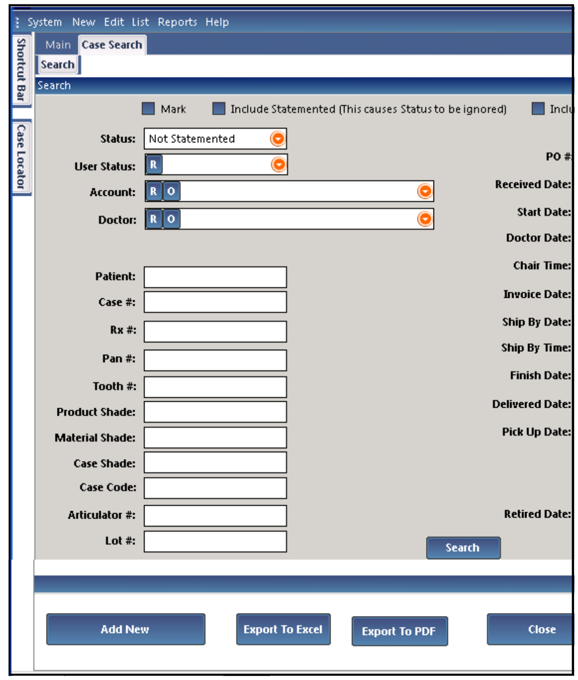
At the **Main Menu** click **List** and then **Case Search.**

OR

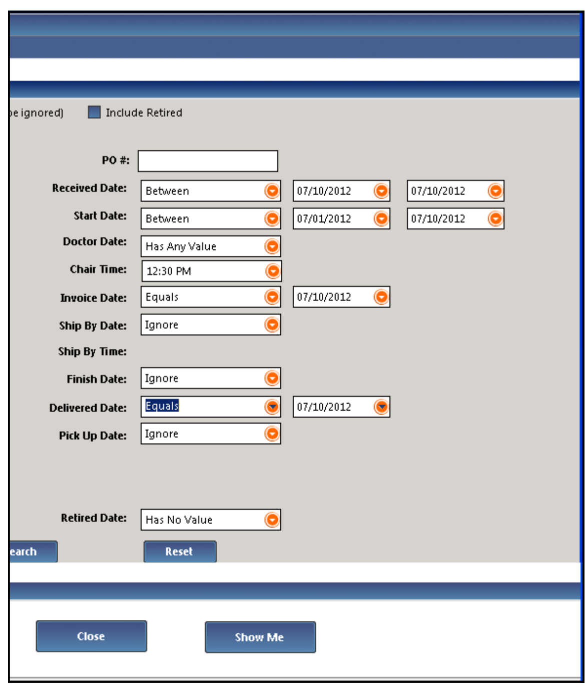
Or at the **Main Menu,** click on the **Case Search** Button.

List of Criteria

Use these criteria when searching single or multiple fields:



- **Mark:** Put a check in the **Mark** box, if specific cases have previously been selected using the **Mark** function.
- **Include Statemented (This causes Status to be ignored):** Check this box to only search for Statemented cases.
- **Include Retired:** Check this box when searching for retired/deleted cases.
- **Status:** Use this drop down to select whether the case is **Open, Invoiced, State-mented or Not Statemented**. It defaults to **Not Statemented**.
- **User Status:** Use this user definable field to find cases that you have assigned a custom status. **Example**: **Try-In, Die Trims.** If you have assigned cases to these custom statuses, you can find a list of all of them here to insure you haven't missed any returns from your accounts.
- **Account:** Use the drop down to select an account.
- **Doctor:** Use the drop down to select a doctor.
- **Patient:** Type in a partial name or a full name. We recommend typing in last name only to eliminate the chance of excluding a patient because the name was mis-spelled.
- **Case #:** Enter in either a partial or a whole case number with a dash.
- **RX #:** Enter in either a partial or whole RX number.
- **Tooth #:** Enter in the tooth number.
- **Product Shade:** Enter in a shade for a product. This will only search the shades that have been assigned to a product.
- **Material Shade:** Enter in a shade for a material. This will only search the shade that have been assigned to a material.
- **Case Shade:** Enter in a shade.
- **Case Code:** Enter in a case code.
- **Articulator #:** Enter in a partial or whole articulator number.
- **Lot #:** Enter in a partial or a whole lot number.



- **PO #:** Enter in a partial or a whole PO number.
- **Received Date:** Type in the date that the case was received.
- **Start Date:** Type in the date that the case was started in the lab.
- **Doctors Date:** Type in the date that the doctor needs the case back by.
- **Chair Time:** Use the drop down list and choose the chair time for the patient.
- **Invoice Date:** Type in the date that the case was invoiced.
- **Ship By Date:** Type in the date that the case was shipped back to the doctor.
- **Ship By Time:** Use the drop down list and choose the time the case was shipped.
- **Finish Date:** Type in the date the case was finished in the lab.
- **Delivered Date:** Type in the date that the case was delivered to the doctor.
- **Pick Up Date:** Type in the date that the lab picked up the case from the doctor.
- **Retired Date:** Type in the date that the case was retired/deleted.
- **Search:** Use this button after all the criteria for the search has been entered.
- **Reset:** Use this button to clear all the search criteria to search again.

Note for Date Fields: Fields that contain dates have a drop down that gives you different ways of searching.

Choose from:

1. **Ignore:** This will not search a date and this is the default.
2. **Has Any Value:** This will look for cases with that date available.
3. **Has No Value:** This will look for cases that does not have a date.
4. **Equals:** Use this status when matching a specific date.
5. **Between:** Use this status when looking between 2 different dates. This will pop up 2 more date fields. Enter in the **Start Date** in the first box and the **End Date** in the last box.

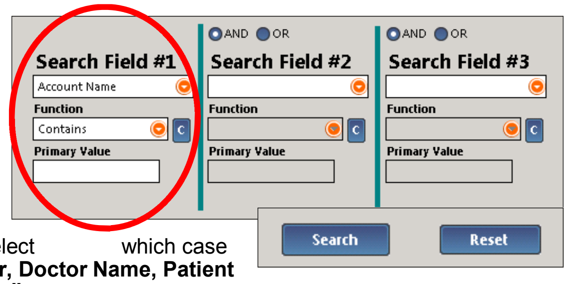
Using the Advanced Case Search

1. At the **Case Search Screen**, fill in at least 1 criteria. See full list of criteria with definitions on this and previous page.
2. Click **Search** and this will fill the grid with items from the search.
3. Hover above **Search** towards the top left corner to have the **Case Search** screen with search criteria reappears.
4. Click on **Reset** to clear the screen to find another case.
5. Once the case is located, click on the **Case Number** in the grid to view the case.

“List Search” Screens

Navigation Tools

A short, universal list search screen allows multiple search criteria for user definable lists.



Example: Combine TWO or more search criteria: At **List, Cases, Search Field,** enter patient’s name in **Search Field #1** and doctor’s name in **Search Field #2,** Lab Manager will only show cases that match BOTH the patient name and the doctor name.

The **Search** screen hides itself when the cursor is moved off of the search area. If it disappears, simply point the mouse at the **Search Tab** and the screen reappears. Using multiple **Search Fields** at one time, allows you to combine multiple search criteria to create custom searches, in seconds.

Search Field: Search Field #1’s first white field, is a drop down list that allows you to select which case field you want to search. You can select from a list: including **Account Name, Case Number, Doctor Name, Patient Name, Pan Number and Multiple Date Criteria.** The default answer is set to “**Patient Name”.**

Function: Search Field #1’s second white field, is a drop down list of common functions used to find the data you are looking for. The default answer is set to **Contains,** because it is easier to find a name that “contains” a portion of the name.

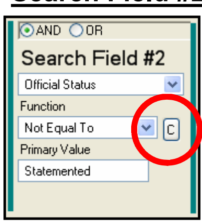
Example: When searching for patient **John W. Smith,** go to **Function** and enter **Contains**. In **Primary Value** enter **Smith**. By specifying just **Smith**, you are more likely to find his name. His name might have been entered as **Smith, John** or **John Smith** or **John W Smith** or **John W. Smith**. Looking for a patient name containing **Smith** would have found all of these examples.

- **Equal To:** Use this function to find items that exactly match the primary value.
- **Not Equal:** Use this function to find items that do not match the primary value.
- **Less Than:** Use this function to find dates that come before (less than) a given date (primary value).
- **Greater Than:** Use this function to find dates that come after (greater than) a given date (primary value).
- **Between:** Use this function to find an item between two given items. Most commonly used to locate a case with a date between two given dates.
- **Contains:** Use the function to locate a name or item that contains a string of characters defined in the primary value field.
- **Starts With:** Use this function to find an item that starts with a string of characters as defined in the primary value field.
- **Ends With:** Use this function to find an item that ends with a string of characters as defined in the primary value field.

Primary Value: Use this field to enter a name or date; such as **Smith** or a **06/12/12**. If you had chosen the **Between** function, Lab Manager will display both a **Primary Value** field and a **Secondary Value** field so that you can enter both a starting value and the ending value.

Once you have selected a field to search, a search function, and typed in what you are looking for, click on the **Search** button to the right. Lab Manager will then look for any matches and then display those matches in a table for you to review. To see more of a case that is listed in the table, just click on the case number in the first column of the table. Click on **Reset** to clear the criteria to do a different search.

Search Field #2’s



Search Field #2’s, first white field, is a drop down list that allows you to filter out those cases that have been **Statemented**. The default answer is **“Official Status”.**

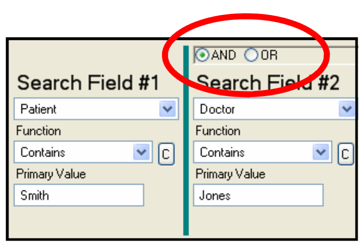
This is done so that you only see the current month’s cases. If all of the cases (past and present) where showing, you might confuse old cases with current ones.
The default answer is **“Not Equal To”.**

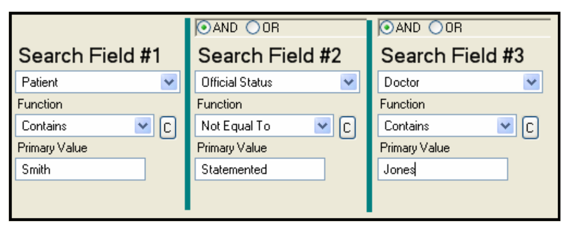
If you want to find an older case; one that has been **Statemented**, simply click on the **[C] button** to the right of the **Function** drop down list field. The **[C] button** “clears” the search criteria in that search field.

AND/OR

Above **Search Field #2** and **Search Field #3** there is the option to perform an **“AND”** search or an **“OR”** search. These functions are used when you are using two or more search criteria.

Example, if you want to find a case with a **Patient Name** of **“Smith” AND** the case was for **Doctor “Jones”,** you would enter search criteria like the example shown to the right.

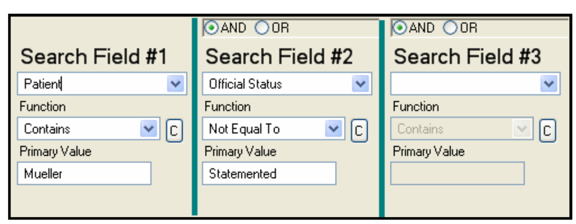




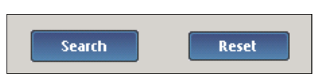
This example will find ALL cases past and present. To narrow the search down to just current cases, enter your search criteria like this next example.

Search Results

After you have typed in your search criteria and **clicked** on the **Search button**, the results of the search will be displayed in a table like the one below.



The search criteria for the table below looked like the example to the right. I searched for a patient named **Mueller** with an **Official Status, Not Equal To, Statements.** In other words, all current cases with a patient name containing “Mueller”.



Now that you can see a list of possible matches, to **see** an entire case,

CaseNumber	Patient	AccountName	OfficialStatus	UserStatus	Doctor	LabToothNumberSystem	DoctorToothNumberSyst
0610-0007	Mueller	1st Account	Invoiced		1b	Universal	Universal
0610-0008	Mueller, Rosalie	1st Account	Invoiced		1b	Universal	Universal
0610-0009	Mueller, Taxable,	1st Account	Invoiced		1b	Universal	Universal
0610-0010	Mueller, NonTaxa	1st Account	Invoiced		1b	Universal	Universal
0611-0001	Mueller, Tom	1st Account	Invoiced		1st Doc	Universal	Universal

“List” Screens

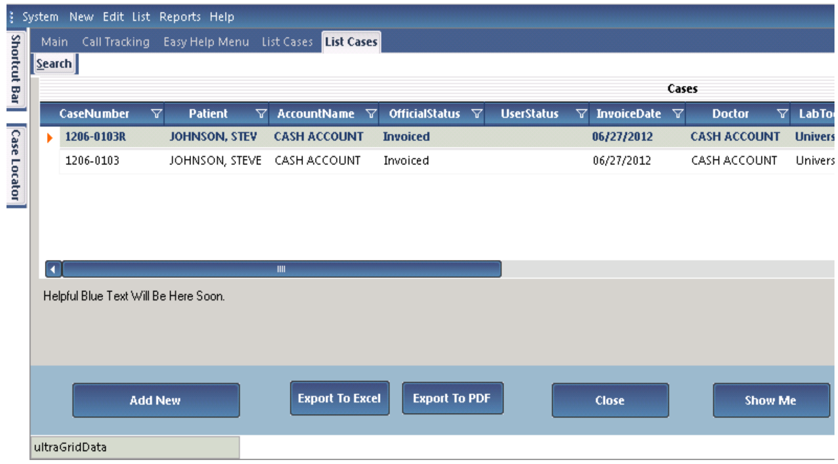
Navigation Tools

View or locate information in a list format. These lists may contain all or may be limited to some of the available items.

Example: Clicking List and then **Cases** will take you to a list, if no search criteria is used and **Search** is selected, then the list displayed will contain ALL of the cases in the system. On the other hand, **if you search for all of the cases for a given account,** the list displayed will only contain the cases for that doctor.

Sorting

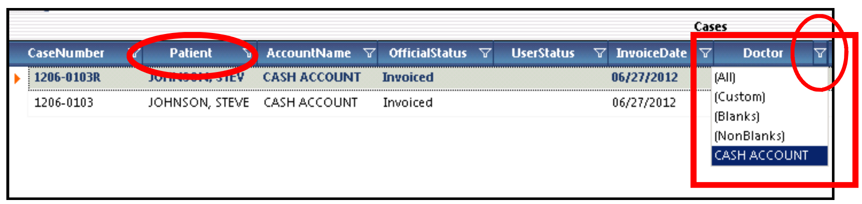
To sort a list, just **click** on the column heading. **For example**, to sort list by doctor, click on the **Doctor** heading. The list to the right, is now sorted by **Doctor instead of by Case Number.** To sort by Patient, simply click on the Patient heading.



Filtering

Filtering allows you to hide items from the list that don’t match a given criteria. **For example:** You might filter out all of the cases except the ones for a given doctor. To filter the list by doctor, **click** on the small funnel to the right of Doctor (As seen above). This will open a drop down list that includes; **All, Custom, Blanks, NonBlanks, and a list of doctor names.** To filter the list to show only doctors with cash accounts, **click on CASH ACCOUNT** in the drop down list.

- The **All** function will cause the list to show all item and remove any filtering.
- The **Custom** function allows you to create complicated custom filters that can be based on one or more filter items.
- The **Blanks** and **NonBlanks** function will limit the list to just blank or non-blank records. These can be used for locating cases with a missing Pan #, Dr Date, or some other missing piece of data.



Exporting Data

The information in most tables can be exported to **Microsoft Excel or to a PDF**. This can be very useful for creating custom reports and graphs of **Lab Manager** information. To export the data in the table, simply click on the **Export To Excel** or **Export to PDF** button at the bottom of the screen.

Selecting an Item in the List

In most lists the field farthest to the left is what is clicked on to select that item.

Cases: Click on the Case Number in the grid to select and view the case.
Accounts: Click on the Account Name in the grid to select and view the account.
Doctors: Click on the Locator ID in the grid to select and view the doctor.
Payments: Click on the Account Name in the grid to select and view the payment.
Products: Click on the Description in the grid to select and view the product.
Materials: Click on the Description in the grid to select and view the material.
Vendors: Click on the Locator ID in the grid to select and view the vendor.
Marketing Contacts: Click on the Locator ID in the grid to select and view the marketing contact.
Invoices: Click on the Invoice ID in the grid to select and view the Invoice terms for a case.