

WinVoice Pro/Net Trial Pamphlet

Installation Instructions

Insert diskette into appropriate floppy drive.
Select run from program manager. Or Start->Run, Enter <Drive Letter>:setup(Example: a:setup)
Follow on screen installation instructions.

Configuration

The first time you start, **WinVoice™** will ask you at what date to consider the first period open. This date will be printed on statements indicating the start of your first billing cycle. This date is generally the day you sent out your last statements, unless you intend to enter work that is in the lab previous to starting **WinVoice™**. You must then insure that the *initial period starting date* precedes the received date of the oldest invoice to be entered. Click on the month and day, then click Continue.

A note about lists: All lists (doctors, employees restorations, etc.) are displayed by the system in alphabetical order. Make an attempt to enter your data so the records are sorted as you want them. For instance it is usually best to enter your gold/metals noting their gold content first as they will then usually be sorted by price. See pre-configured metal list for examples.

Configure the shades, shipping, payment, and status types. You will find these under the Configure menu. Then configure your metal types. Enter both the fee and "our cost" fields for each metal. Don't worry if the cost varies, when entering an invoice, you may override this value. You should also enter a note (physical properties) about each metal. This note pertaining to this metal will be printed on standard invoice formats informing the doctor about the composition of the metal. Use the pre-configured information as a guide

Departments should be next when configuring **WinVoice™**. Departments are overall categories for your designs and restorations. Highlight a department, then click on the Edit button. From the department window, you may configure designs, restorations, and what the clicks on the tooth chart represent (see your manual for details, you should at least have some text in for "One click"). First you should click the Design button and configure your designs. Once your designs are finished, you should configure restorations.

When you edit a restoration, you should also configure its steps. Steps are the procedures needed to complete a given restoration and are used for employee productivity reports, piece rate reports, and auto-scheduling. Generally, the steps involved should give you a good idea as to the unit designation for a restoration. "Units" is a number you assign (from one to 7) to each restoration that is used by the system when scheduling and printing employee productivity. For instance most labs count each porcelain fused to metal as one unit, they also count each porcelain fused to metal with a porcelain shoulder as one unit. Therefore, set the restoration PFM unit designation as "1" and the restoration "Porcelain shoulder" as "0", this will schedule a PFM with a porcelain shoulder as one unit. Use the pre-configured information as a guide.

Setting up your restorations and steps is usually the longest part of configuration. Don't worry if its not completely accurate, you can go back and modify it at anytime. In fact, most labs constantly rework the step lists of restorations, to help improve the auto-schedulers performance.

With your departments, restorations, and designs completed, you should next configure your doctors. Click the Doctor menu and then on Select/Modify. Highlight the doctor you wish to edit and click the Edit button. When creating doctors, don't forget to set the "OpnBal" fields (Opening Balance) for this doctor. Opening Balance is how much the doctor owes before **WinVoice™**'s invoices start (generally the balance from the last statement sent out prior to setting up **WinVoice™**). If you wish to charge a doctor a different fee other than your default fees. Click on the Fees button then you can highlight a department and change the fees for designs, restorations, and metals, applies to doctor in question only.

Invoices

Once configuration is complete, you may begin entering actual invoices. Click on "Invoice" menu and then on "Select/Modify" This calls the Invoice Select dialog box. From this dialog you create new, edit, print, and close your invoices among other functions. You may wish to click on the View Options button to see the view filters that can be used to display various invoice selections on this screen. You can filter which invoices will be selected for viewing/printing in numerous ways.

You should delete the dummy invoices that **WinVoice™** comes setup with. Highlight one invoice by moving the cursor to it and clicking the left mouse button, then click the delete button, a conformation window will appear asking if you are sure, click on the Yes button. Repeat the process until all invoices are deleted. Some invoices might indicate "can not delete closed invoice". To correct this problem, edit the invoice and click on the check box called "opn" and then save.

To create a new invoice, click the Create New button. You will be presented with the Invoice Editing dialog box. Click on the fields you wish to enter or use the tab key to move between fields. You should start by selecting the doctor for this invoice (as the doctor

selected can affect pricing for this invoice). Then proceed to fill in the rest of the information. When entering date fields, click on the  "Calendar" icon. A graphical calendar is displayed, click on the month and day to quickly fill a date field.

Clicking on the Shade button allows you to enter a description of a custom shade. This information is attached to this invoice and can be easily recalled at a later date. Clicking on the Items Received button calls a dialog allowing you to click on the items that were received with this case. Clicking on the  "Totals" icon will display detailed information concerning pricing of the invoice.

Each invoice will have tasks assigned to it. Tasks are the procedures (restorations) that are to be completed for this invoice/case. Click on the Add Task button to create a new task. You will be asked what department this task is to be assigned to (which will be skipped if you only have one department configured). When creating a new task, you should first select the teeth/arch that are involved for this task. When you configured your departments, you told **WinVoice™** what each click on a tooth represents for this department. Click on the tooth/teeth/arch to be restored changing their colors to graphically represent the restoration to be completed. Then, click on the restoration for this task (you can override the displayed fee if required). Next, select the design (if any) for this task, and finally, select the metal (if any) to be used for this task. If you know the metal weight, enter the value in now. If not, you may enter in the metal weight later when closing this invoice.

Note: If when you click on teeth on the tooth chart, teeth do NOT highlight, even though you have text under the department in the "One click" region. Windows is more than likely setup in "large font" mode. Under Win95, exit WinVoice, click Start->Settings-Control Panel. Then double click on "Display". Then click on the tab named "Settings". Then in the section called "Fonts" select "Small", click "Ok". Your computer will then need to restart and it should correct the tooth highlighting problem.

When you are finished with the invoice click the Save button, the invoice will then be highlighted at the bottom of your list of invoices. If it does not, go to Invoice View Options. To print invoices, highlight the invoices you wish to print. (To highlight more than one invoice, hold down the ctrl key while left clicking with your mouse). When the invoices to be printed are highlighted, click the Print button. You will then be asked to select a print format(TPF). They allow you to print various invoice/work ticket formats. If a suitable invoice format is not included, **WinVoice Development** can design a custom .TPF for your lab for a modest fee, contact sales for more details.

Daily routine

Most labs enter their invoices in batches on the date they are received and print invoices/work tickets to be sent through production. When gold weights are known they will make note of it on the doctor's copy and the lab copy of the work ticket, multiply the weight by the price per weight noted on the work ticket and add that figure to the subtotal on the doctor copy of the work ticket. They then, return the work ticket (doctor's copy) along with the completed case to the doctor, keeping the lab copy of the work ticket (with gold weight and Total Fee noted.).

They then take a full days completed work tickets (lab copies) to the computer and close each invoice one at a time, entering the gold weights (use the Search button for find invoice in a large list). When finished, the lab copies are added on a calculator, and the total is checked against the Period report total for that day. If the totals match you are sure everything is entered correctly. This is how we suggest you standardize your daily routine. It will ensure your paper records coincide with your computer records for tax purposes and accountability.

Reports

The reports in **WinVoice™** are based on a semi-real time accounting system. Which means that even though billing cycles are assigned (periods), **WinVoice™** still generates reports real time. Real time accounting applies payments to oldest invoices and recalculates values at the time of report generation. This gives the feel of traditional accounting principles as well as keeping you informed by the minute as to what is going on in your laboratory. It also utilizes the capabilities of your computer to its maximum. To select between Open Invoice or Balance forward statements, edit your company information.

End of Month

To send out statements to your doctor, you should first look over your statements using the State button on the button bar, to verify that their statements are correct. Once you've verified that their information is correct, you should run a backup for safe keeping. Then click the activity menu from the main **WinVoice™** screen and select "Close Period". Closing a period indicates to the software the end of your billing cycle and assigns interest charges to past due accounts. Once close period is finished, you may use the Print Rep menu to print your statements. Please note that your trial period will EXPIRE 3 days after you perform this function. When the trial period expires, you do NOT lose your information, you simply have to purchase the software from us to continue using **WinVoice™**.