

# Version 3.5

WinVoice Development	P.O. Box 70	Tulsa, Oklahoma 74101-0070
<b>sales</b>	<b>:</b> (918) 665-7326	<b>Sales (WATS)</b> : (800) 665-0091
<b>support</b>	<b>:</b> (918) 627-5395	<b>FAX</b> : (918) 627-7842

Software and Manual © Copyright 1995-98 TY&A Inc. All rights reserved

*Distribution or reproduction of this manual or related software is prohibited without the express written consent of Tom Yancy & Associates, inc.*

# Table of Contents

<b>TABLE OF CONTENTS.....</b>	<b>2</b>
<b>CONCEPT.....</b>	<b>5</b>
<b>NEW FEATURES .....</b>	<b>6</b>
<b>NETWORKING .....</b>	<b>7</b>
PRIMER.....	7
EXAMPLE NETWORK .....	8
CONFIGURING WINVOICE ON THE NETWORK.....	10
<b>UPGRADING .....</b>	<b>10</b>
<b>CONFIGURATION .....</b>	<b>11</b>
COMPANIES .....	11
EMPLOYEES .....	14
DOCTORS.....	15
DEPARTMENTS.....	17
RESTORATIONS .....	17
STEPS .....	18
DESIGNS .....	19
METALS.....	19
SHIPPING TYPES.....	20
SHADE TYPES .....	20
PAYMENT TYPES.....	21
STATUS TYPES .....	21
BACKGROUND CONFIG.....	21
SYSTEM CONFIG.....	22
PRINT TUNE.....	22
<b>INVOICES.....</b>	<b>23</b>
VIEW OPTIONS .....	23
DATA ENTRY .....	25
TASKS .....	26
SCHEDULING.....	27
PRINTING.....	29
CLOSING.....	31
DELETING A CLOSED INVOICE .....	32
BARCODE LOOKUP.....	32
STEP BARCODE .....	33
QUICK CREATE .....	33
FIND INVOICE .....	33
<b>PAYMENTS .....</b>	<b>33</b>
CREDITS .....	34
ADJUSTMENTS .....	34
<b>INVENTORY .....</b>	<b>35</b>
VENDOR CONFIG.....	35
SERVER CONFIG.....	35
MODEM CONFIG.....	35
TELXON CONFIG .....	36
BROWSING CATALOGS .....	36

IMPORTING CATALOGS .....	36
PLACING ORDERS .....	36
<b>BILLING PERIODS AND ARCHIVING.....</b>	<b>36</b>
CLOSING A PERIOD.....	37
ARCHIVING .....	37
<b>STATEMENTS.....</b>	<b>38</b>
VIEWING STATEMENTS.....	39
PRINTING STATEMENTS .....	39
<b>REPORTS.....</b>	<b>40</b>
DOC/COMP/EMP MAILING LABELS .....	40
STANDARD REPORT OPTIONS.....	41
<b>BILLING REPORTS .....</b>	<b>41</b>
ACCOUNTS RECEIVABLE AGING .....	41
ACCOUNTS RECEIVABLE DUE LETTERS .....	42
COLLECTIONS/ADJUSTMENT REPORTS.....	42
SALES TAX REPORT .....	42
FINALS REPORT .....	43
PERIOD BILLING SUMMARY .....	43
<b>INVOICING AND SCHEDULING REPORTS.....</b>	<b>43</b>
UNITS REPORT.....	43
PERIOD SUMMARY REPORT .....	44
OVERALL PERIOD REPORT.....	44
DAILY REPORT .....	45
STEP DAILY REPORT .....	45
RUSH CASE REPORT .....	45
SCHEDULING REPORT .....	46
<b>USAGE REPORTS.....</b>	<b>46</b>
RESTORATION REPORT .....	46
DESIGN REPORT .....	46
METAL REPORT .....	47
MISC CHARGE REPORT .....	47
SHADE REPORT.....	47
COST REPORT.....	47
TOOTH REPORT .....	48
SHIP REPORT .....	48
SERVICE CHARGES.....	48
<b>PRODUCTIVITY REPORTS.....</b>	<b>48</b>
DOCTOR CHECKUP.....	48
DOCTOR PRODUCTIVITY REPORT .....	49
EMPLOYEE PRODUCTIVITY REPORT .....	49
EMPLOYEE STEPS REPORT .....	49
WORK REPORT .....	49
<b>LIST REPORTS .....</b>	<b>50</b>
DOCTOR LIST .....	50
CONTACT LIST .....	50
RESTORATION LIST.....	50
STEP LIST.....	50
PRICE LIST .....	51

<b>TIME CLOCK REPORTS.....</b>	<b>51</b>
TIME DAILY REPORT .....	51
TIME SUMMARY REPORT.....	51
<b>INVENTORY REPORTS .....</b>	<b>51</b>
INSTOCK REPORT .....	51
ONORDER REPORT .....	52
USAGE REPORT .....	52
BROKEN REPORT .....	52
<b>UTILITIES .....</b>	<b>52</b>
BACKUP.....	52
TIME CLOCK .....	53
STEP TRACKING .....	53
MEMEDIT .....	54
PECOS.....	54
CARD FILE.....	54
MISCELLANEOUS FUNCTIONS .....	54
REMINDERS .....	54
E-NOTES .....	55
VIEW LOGS .....	55
VIEW USERS .....	55
<b>TIPS AND TRICKS .....</b>	<b>56</b>
<b>SUPPORT .....</b>	<b>57</b>
<b>GLOSSARY.....</b>	<b>59</b>
<b>INDEX .....</b>	<b>60</b>

# Concept

Six years of design and development have been invested in the **WinVoice™** project. Our goal: To provide an inexpensive, flexible and friendly invoicing and billing program, written exclusively for dental laboratories, using the Windows™ (3.1/9x/NT) operating system.

**WinVoice™** software takes advantage of time saving features like *point and click execution, pull down menus, cut and paste capabilities, combo box selection, and multi tasking*. **WinVoice™** also uses an attractive and intuitive graphical user interface.

To guarantee that **WinVoice™** keeps current with the ever-changing dental field, it was designed from the ground up to be almost completely configurable. To keep up with the latest software standards, it uses the C/C++ programming language renown for its cross-platform compatibility and speed. This allows us to very quickly adapt to new environments and rapidly create new and unique features. With this technology, **WinVoice™** allows for a multitude of lists. Each list can have approximately *65 thousand* entries. The only limits are your imagination and the power of your computer.

Most competing software packages are limited to what the software designers envisioned as the best way to run a laboratory and print an invoice. **WinVoice™** print format files allow for a complete redesign of how invoices, form letters, work tickets, and statements are typeset. A well-informed computer user can accomplish print format changes or if you prefer, **WinVoice Development** offers custom design service for a nominal fee. This powerful feature allows you to print your documents the way YOU like! **WinVoice™** printing formats use Window's print drivers. This means your invoices, statements, and reports will print the same on almost any type of printer, on most any type paper. You are able to use the oldest dot matrix printer you can imagine, or the newest laser printer that has yet to even be built!

**WinVoice™** software packages are tailored for the size and needs of your lab. **WinVoice-Junior™** caters to small labs or users with limited computer experience. It offers different Plus modules to accommodate the rapidly growth of employee computer skills and lab needs. **WinVoice-Pro™** offers a complete package with more powerful features and reporting that larger labs find important, such as automatic case scheduling, employee production management, piece rate payments and multi-level security tailored for each employee. **WinVoice-Net™** is our top of the line software, designed around even larger full service labs that need advanced reporting, multiple computer usage, different invoice styles, inventory, ordering, time clocking, and a large workload.

**Networking is a valuable time saving tool that can benefit both small and large labs.** Networking with Windows™ is as easy as installing network cards in your computers, connecting cables and rebooting the machines. When running **WinVoice-Net™**, one node (a computer) can be creating new invoices, another node can be processing statements, while yet another can be generating reports or checking on cases in progress. Networking can actually pay for itself in increased productivity and the sharing of expensive hardware such as laser printers and hard drives.

This is the seventh release of **WinVoice-Net™**. It is the culmination of years of research, development, and responses from users like you.

We hope you enjoy the **WinVoice™** experience!

# New Features

Here is a small list of improvements in WinVoice™ v3.5. See REVISION.TXT in the \WINVOICE directory for a complete list.

- Inventory and electronic ordering of inventory
- Time clock and associated reports
- 32-bit version along with standard 16 bit version. 32-bit version can run 30% faster on Win9x/NT systems.
- Individual step barcoding
- Block format printing of invoices
- New, faster print engine with over 300 TPF commands
- Employee departments to help sub-divide reports
- Doctor territories to help sub-divide reports
- Improved barcode lookup
- Find invoice feature
- Quick create invoice
- Newer list box routines speed sorting tremendously
- Re-optimized for an even higher volume of invoices and more compatibility with record numbers
- Auto-renumbering/checking of data files
- Local temporary directory work reduces network traffic.
- Improved security. From 30 options to 130. System password protects against deleting/creating companies
- HP/Non-HP print option optimizes for graphics on HP printers
- Remembers last printer selected in various sections allowing for easier multi-printer use
- % profit on cost report per invoice to help associate unprofitable invoices
- Major improvements in report speed
- Ability to embed colors into notes
- New menus with helpful graphics to identify what options perform what functions
- Hot keys to quickly access commonly used features
- DOS versions of time clock and step recording software's for older machines
- Various new reports
- Checks for printer overloading to allow larger volumes of printout
- New easy to use button bar with win98 design

# Networking

The following sections give you information as to how **WinVoice™** is used on a LAN and how to install a simple Win9x LAN. If you already have your network installed, simply see the section named *Configuring WinVoice on the Network* to create your program icons.

## Primer

**WinVoice™** is designed to work on many different network platforms. Rather than limit our software to one particular network interface, we use very sophisticated internal methods of file sharing and collision detection. This means that as long as your particular brand of networking software allows for drive mapping and read/write access to mapped drives, **WinVoice™** will be compatible.

This section covers a brief introduction to networking as well as an example of how to setup **WinVoice™** and Windows9x™ to operate as a peer to peer networking platform.

There are two distinct networking philosophies, Client-Server and Peer to Peer. Each one has individual strengths and weaknesses.

The Client-Server platform uses one computer as a Server that in turn supports another or several individual Client computers. The main advantage to the Client-Server platform is additional security options. The server can be set up to authorize or deny Client machines access to specific information. The Server can also manage the Clients easier by using remote updates and remote operation. Client-Server also supports more Clients successfully than Peer to Peer networking.

Unfortunately, Client-Server is usually much more expensive, due additional software and hardware requirements. For example: WindowsNT™ v4.0 or equivalent lists for \$649 and a top of the line computer to act as the Server can cost as much as \$3,000. You will also need basic additional networking components for each Client computer that will raise their price to as much as \$2,500. Depending upon your desire for speed, this places your financial investment for a 4-node client server network to between, \$6,649 and \$10,149. For this reason, we recommend dental laboratories only use a Client-Server platform if they plan to have more than eight machines on their network.

The Peer to Peer platform connects several Client machines together to act as a network. Each Client can set passwords to protect different elements of that system. The networking protocols that are available for this platform begin to peak at six nodes but operate very efficiently at four nodes. We recommend this platform to be used for smaller networks. Peer to Peer can be less secure than the Client-Server model. This is because the network administrator can not deny Client machines access to specific information. It is, however considerably less expensive as you need only Windows for Workgroups™ or Windows9x™ loaded on each machine to operate successfully. It also requires less configuration and maintenance and can be done by new time computer users.

# Example Network

Before attempting to install WinVoice-Net™, you should first obtain all necessary hardware. We suggest that you purchase a quality network card for each computer that is going to be hooked to your network. You will also need lengths of cable to connect each computer. There are two cabling methods. Twisted pair (10Base-T) and Coax (BNC/Thin Ethernet).

Twisted pair are flat cables with jacks on each end that look very similar to telephone connection cables. They are easy to work with and rarely experience installation problems. They are however, slightly less efficient in transferring information and to properly connect each computer you will also need a network hub. A hub is a device that each computer on the network is connected to. You can think of it as a switching device routing information between each machine. Each machine would have a network card in them, which has a cable that is led to the hub, which moves data information between the different machines. If one machine or plug is damaged, the hub simply ignores information from it, while the other computers continue to operate. Hubs can also be linked to extend the number of nodes they support.

Coax looks like cable television cabling. It is a bit more expensive and more difficult to work with than twisted pair, but it does not have the expense of a hub. Rather than using a hub, a "T" connector connects different machines using coax. The last machine on either end has a "terminator plug" attached to the other end of the T to indicate that it is the last machine. This is more difficult to work with, because, if any of the cabling between any of the machines is damaged or if a network card malfunctions, none of the other computers can access the network until it is repaired. However, if you are only networking two machines, this is the most cost-effective layout.

Once the hardware is installed, you must install the software. Each machine must have a driver installed for the installed network card. If you are using Windows9x™, most networking cards available will be auto-detected and their drivers automatically installed by Windows9x™. Otherwise, you must manually install the driver from the disk provided by the network card manufacturer. This driver tells the computer how it can operate the card. Once the computer knows how to operate the card, it needs to have a common "language" to talk to other computers on your network.

A network protocol is a unique language that is used to allow your computers to share information. When the network card driver is installed, it additionally installs a set of common network protocols into Windows™. These common network protocols are designed to interface with WindowsNT™. If you intend to setup a Peer to Peer networking system, you will need to change these network protocols. We recommend using the *NetBEUI* protocol for Peer to Peer networking due to its incredible ease of setup.

To install *NetBEUI* with Windows9x™, click Start->Settings->Control panel. Then double click on the icon named Network. Remove every listing except the one that was installed for your network card. If you are already using dial-up networking for Internet connectivity, only delete the references to your network card (usually TCP-IP). Then, click the Add button, then select Protocol, select Microsoft, and select *NetBEUI*. This will add an entry for your protocol for any adapters that resident in your system. If you are using dial-up networking, you will need to remove the *NetBEUI* entry for the dial-up adapter.

Once the protocol is installed, you need to make sure that your Client knows how to log-on properly. Select Client, then Microsoft, then Client for Microsoft Networks. Under Primary Network Logon, you should have Client for Microsoft Networks listed.

Click on the File and Printer sharing button. You should at least have the File sharing turned on. You can decide later if you would like your printer shared or not. Clicking the Ok button will add File and Printer sharing for Microsoft networks to the upper list.

Now you need to make performance adjustments to insure you network will operate at it's best. Double click on the Client for Microsoft Networks in the above list box. Make sure there is NOT a check mark for log on to Windows NT domain insure that it is set for Quick Logon. Click the OK button to save your settings.

Now double click on NetBEUI and click on the tab named Advanced. From this tab, make sure Set this protocol to be the default protocol is ON. The two other options on this screen, Maximum Sessions and NCBS can be changed based on your performance needs, but the default settings usually are adequate for end nodes. For the server, we recommend at least 30 in each section. Please note, the higher this number, the more memory networking takes up. Remember that if you experience problems later, you can always come back to this section and increase them. Click the Ok button to save these settings.

Now double click on the File and Printer sharing for Microsoft networks in the upper list. This section has two options, Browse Master and LM Announce. LM Announce should be set to Yes. Browse master is a method of optimizing how your Peer to Peer network operates. **WinVoice-Net™** should be installed on your fastest machine and it should be set for Enabled, your second fastest machine should have Automatic set and your slower machines set to "Disabled". The reason for this is that a browse master caches information for the entire network similar to a Server platform, but on a more rudimentary level. Please note that the newest version of Windows™ should always be used as your browse master, as with each succeeding version of Windows™, this caching becomes more efficient (for instance, WFWG did no caching, only kept a table of what network resources where available. Win95 added caching of actual network data, and Win98 added pre-loading of common resources. A win98 machine would want to override a WFWG's browse master, due to its improved features). You should always turn on your Browse Master computer *before* turning on the other machines. This insures that the browse master is made aware that the other machines are turned on and will properly cache their network traffic. Click the Ok button to save these settings.

Now click on the tab named Identification. Make sure each machine has a **unique computer name** and the **same workgroup name**. It is best for both names to be all capitals and shorter than eight characters. Do NOT use spaces use only numbers or letters.

Example:	Computer name	= MASTER
	Workgroup name	= DENTLAB
	Description	= Main WinVoice Computer

Now click on the tab named Access Control. It should be set for Share level. Click the Ok button to save your new network settings. After completing, the settings for each machine and insuring, those all-physical connections are made. You should Shut down each machine and restart them in the following order. First the **browse master** machine, second the **automatic** machine, then all other machines. Your network should now physically be able to communicate, but you still need to ascertain which information is to be shared.

To make a shared Directory, click on Start->Programs->Windows Explorer. From windows explorer, right click on the folder on the left-hand side that you wish to be shared (C:\WINVOICE, in most cases). Then left click on the option called Sharing.... Then insure the option named Shared as is selected. You will also want it to be read/write accessible and you can optionally enter a password to protect the directory from everyone on the network from accessing it. The shared name can be what you find most describes the folder. Usually **WinVoice™** works best. Click the Ok button to save the information then exit from Explorer.

To make a shared Printer, click on Start->Settings->Printers. Then right click on the printer icon or name connected to the computer and select Sharing... then select Shared as. You should use a descriptive name of the printer, for instance LASER for a laser printer.

## Configuring WinVoice on the Network

Assuming you have completed all steps in the previous section, you should setup all other machines on your network to allow them to connect to the newly shared resources. Go to each machine in order and complete the following.

Get into windows explorer by clicking Start->Programs->Windows Explorer. Clicks on the Tools menu select Map Network Drive. It will display the first available drive letter, you may select a different one if you wish. It is usually best to select the same drive letter for each machine, this makes it easier to perform low-level work later. We recommend drive letter **F** this allows room to install a CD-ROM and a second hard drive in the future. The Path field should be filled with the name of the shared resource to connect to. In our example, the path would be \\MASTER\WINVOICE. Click the Ok button to save this drive mapping information.

To connect to a printer, click Start->Settings->Printers. Then double clicks on Add Printer then select Network Printer then next. The browse button will provide a list of available printers on the network.

To setup WinVoice™ on an end node, click Start->Run, and type in F:\BUILDICO. The buildico.exe program is in the WinVoice™ directory, its purpose is to build the icons to access WinVoice™. Running BUILDICO is a good way of testing to make sure your network is linked properly.

## Upgrading

To upgrade from a previous version of your existing WinVoice™ software or a less advanced offering of WinVoice™ you should first make a backup of your current data. This insures that in case of problems that may be encounter during installation, you will be able to restore your current data. A wise man once said. "The only data ever lost, is data that has not been backed up."

If you have made any changes to TPF files, it is important that you save them to another directory as they will be overwritten during the installation process with their newer versions, this does not apply to custom TPFs developed by us for you, as they have different naming conventions.

Run Scandisk (thorough) on the floppy disk and Scandisk (standard) on your hard drive to check for errors. If problems are detected, select the option to correct them. It is important that your drive and disks are error free before upgrading. NOTE: To get to Scandisk from Windows9x/NT™, Start-Programs->Accessories->System Tools->Scandisk.

Make sure NO copies of WinVoice™ are running on your computer or any other computer hooked to the network. If you are running a network, you should also run *Network Repair* to verify that all temporary files have been cleared. A good way to verify this is to restart the WinVoice™ machine before installing the upgrade. If a copy of WinVoice™ is running, the upgrade will \*not\* be successful but \*no\* error messages would be displayed.

Install the upgrade from the disk as instructed by the documentation included with the upgrade disk.

Once the update is complete, you should logon to your company and review your configurations, looking for new switches and options (especially with v3.5s new security options).

## Configuration

Included with this manual is a "Getting started" pamphlet. Please take time to read this pamphlet in its entirety, as it will help you to become familiar with the steps necessary and in what order they should be accomplished when configuring WinVoice™ with your lab's information. This section gives specific information about each configuration section, while the Getting Started pamphlet gives a general order of which parts of configuration are important and which you should complete first.

WinVoice™ is shipped with dummy data, we suggest that you use the dummy data as a guide and modify it to reflect your lab's information. ***It is much faster to modify existing data than to create new data!***

WinVoice™ is designed to allow you to customize most every element. To ease configuration, all *lists* use the same basic "list-select-edit" design. This greatly reduces the learning curve required to use the program and enables you to quickly maintain configuration lists.

The buttons at the bottom of dialog window manipulates the list of items above them. If for some reason you can not view the buttons, or the complete list as the graphic in this printing indicates, you should move your mouse pointer to the lower right hand corner of the window, your mouse pointer will change into a diagonal double sided arrow. At this point, hold down the left mouse button and drag the pointer to the lower right of your monitor screen. Doing so allows you to re-size the dialog box to match your monitor's screen size. Let go of the mouse button to save the desired size. Additionally, by holding down the left mouse button on the title bar (the bold heading line that encompasses the small icon in the upper left hand corner of the dialog window) and moving your mouse, you can reposition the dialog box anywhere you wish on your monitor's screen.

WinVoice™ remembers the new position you have selected and the dialog will appear in the same spot the next time it is executed. This allows you to position dialog in the most comfortable positions and sizes for your screen size. Please note this will affect the positions of the dialog boxes for all other users as well.

## Companies

WinVoice™ allow invoicing/billing for multiple companies. A Company in WinVoice™ is any entity that needs to maintain a doctor/account list. Labs that operate two or more businesses under one roof and use different names for each business commonly use this feature. Alternatively, for labs with multiple locations and the same name. Each company can have separate employees, configuration, and invoices. It should be noted that most applications require only one company. **Important!** *Companies* differ from *Departments* and should not be used to segregate departments within your lab as it could cause repetitive invoice data entry. See: *Departments*

Upon executing WinVoice™, your list of companies is presented. The company list allows you to select the company to use for the current session, you may also, *Edit* a company; *Create* a new company; or *Delete* an

existing company in your list of companies. The activity menu at the top allows you to change the system password for accessing company information.

When the *Create New* or *Edit* buttons are clicked, the Company edit dialog box is displayed.

Most dialogs are divided into sections, the first section in this dialog contains the company information fields. These fields are used to produce invoices, statements, and reports. Fields include; company street, company city, company state, company zip, company contact (generally the owner or manager), company bank/account number, Federal/State/Province/license id, and sales Tax permit number. All fields are optional except the company name and the company name should be unique. If you have more than location with the same name, add which city they are in as part of the name or some other distinguishing characteristic.

The second section contains a voice contact telephone number, the FAX number for this company, and a data number for this company (can be modem or E-mail site). To assist our international customers and to allow for possible future changes, a strict format is not required, you may type X-XXX-XXX-XXXX or (XXX) XXX-XXXX or any combination you wish.

The third section contains system information. The *password* field is where to enter a password that will be required to access this company. **Important!** The company password is different than the employee password field. The company password is required each time someone attempts to select, edit, or delete this company. If you enter this field and click the *Save* button, you are then asked to confirm the password before WinVoice™ actually saves your changes. **Be sure to remember the password. If you forget the company password, you will not be able to access the company!**

The *directory* field is where on your hard drive WinVoice™ is to place the company's data files. This is a standard DOS directory filename, it must be 8 characters or less and may NOT contain spaces or punctuation characters. The company directory will become a sub-directory of the root WinVoice™ directory. For instance, let us assume WinVoice™ was installed in the C:\WINVOICE\ directory, and "demo" remains the directory field. Under this circumstance, the data for the company will be stored in the C:\WINVOICE\DEMO\ directory. **When you have created and saved a company, the directory field can not be changed.**

The *Inv type* field allows for future expansion of WinVoice™ into other markets and should ALWAYS be set to "Dental".

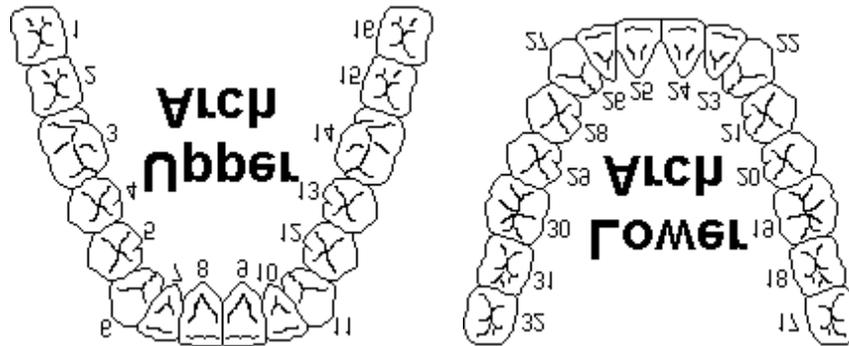
The *Print Custom labels* check box allows you to select if you wish to be prompted to Print Custom labels after the printing of invoices. If a check is in this box, the Custom label dialog box will display asking if you wish to print Custom label after you print an invoice. Custom labels are different from the Mailing label report feature discussed later in this manual. When *Balance Forward* is check box marked, *Balance Forward* accounting will be used to produce statements and they will show opening balance, current period credits, and current period invoices. Without a check mark in this field, *Open Invoice* accounting will be used to produce statements. *Open Invoice* statements shows all invoices that remain unpaid. With *Batch Invoicing* checked, you will be prompted if you want to create a another invoice after saving a new one.

Default view options allows you to set the selection filter that is displayed when viewing invoices. As your invoice list grows, it becomes increasingly more important to keep your invoice list short and to the point. This setting allows you to set the selection filter to either the last Either, Open, Closed setting, or to force it to be Open or force it to be closed. The Closed option can also be useful for labs that do not create work tickets for their invoices and close them as soon as they are created.

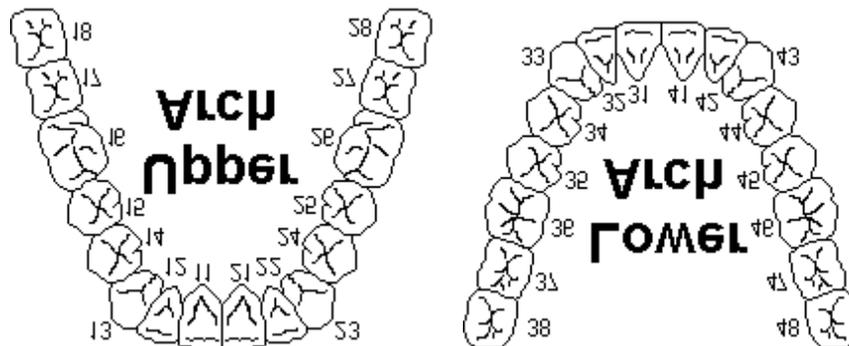
Do not use auto-scheduler allows you to switch between the full screen scheduling calendar, or the quick regular calendar for selecting the scheduled date for invoices.

Standard/Line item/Prompt allows you to select the style of invoice creation you would like to use. See the invoice chapter for more information as to which each style appears like.

The last box allows you to select between United States standard or Canadian standard, teeth numbering schemes. When "Canada" is selected, Tax permit # is changed to Goods and Services Tax #, and Federal ID # is changed to License #. The United States tooth numbering scheme starts with the upper arch at tooth #1 and moves sequentially up and around to tooth #16. The lower arch begins at tooth #32 and continues, reducing, sequentially to tooth #17.



The Canadian scheme starts with the upper arch at tooth #18, then #17, #16, #15, #14, #13, #12, #11, #21, #22, #23, #24, #25, #26, #27, and #28. The lower arch begins with #38, then #37, #36, #35, #34, #33, #32, #31, #41, #42, #43, #44, #45, #46, #47, and #48.



Access to WinVoice™ is first restricted by company selection and is further restricted by each company having a list of "employees" or users that are allowed to "logon" to WinVoice™. When a new company is created, a single employee is automatically created in the employee list that is defined as the "Administrative employee". This newly created Administrative employee is named "SysOp" and has all security buttons turned on, with the exception of *Locked Out*. This allows the administrative employee to create additional employees or delete existing dummy employees. The employee password for SysOp is "system". **The Administrative employee is very important to the new company, as he is the only person allowed to gain access to the new company's data.**

The first thing you (the Administrative employee), should do after creating a new company is edit the employee "SysOp" to reflect your personal information (name and password), assuming of course that you are to be the Administrative employee.

See: *Employee* section of this manual for additional information as to how to edit/create employees.

To help secure your company list, from the activities menu an option exists named System Password. By clicking this option, you may set a password to have access to edit/delete/create new companies. This is in addition to the password required to edit a specific company. This adds an extra layer of security for your lab that you may or may not need. To remove the password, simply press enter when it asks for the new password (in other words, leave the line blank) and it will verify that you wish to remove the system password and allow anyone to create new companies.

## Employees

The Employee function of WinVoice™ allows the Administrative Employee to restrict access to different areas of the system for every other employee. When the system is first started, you should edit the employee named SysOp and change its user name and password to match yours. This will make you the administrative employee for the company. Its also a good idea to create a second employee that has all security enabled, just in case you forget your password.

Click *Config->Employees* from the menu bar, you will call the company's list of employees. An employee is defined as any individual that is going to have access to the system, or whose productivity will be tracked by the system. *Note: Employees can be locked out of the system and still have productivity tracked.*

The Employee list allows you to *Create, Edit* and *Delete* your employees.

Clicking on the *Edit* or *Create New* buttons will bring up the Edit Employee dialog.

The Employee Edit dialog allows you to maintain employee data fields. You can record important dates, including the date the employee started with your company, the last time the employee received a raise, the date the employee's probation period expires, and the last time the employee was reviewed. Please note that the birthdate field is for the day of birth only, you should not attempt to select the year. All fields other than the employee name field are optional.

By clicking on the *Note* button, you can keep an ongoing employee performance record. The employee note can contain up to 16,000 characters!

Clicking the *Security* button of the Edit Employee dialog displays the Employee Security dialog box.

This is where you tell the system what areas of WinVoice™ each employee may have access. You may restrict each employee's access to WinVoice™ as much or as little as you feel necessary. Items with check marks next to them indicate that the employee has access to the feature described.

**IMPORTANT: The "Administrative Employee" must have the Modify Employee check box selected in the Employee Security dialog box. Without this security privilege, the Administrative Employee will not be able to create a new, or edit existing employees! Its best to click the All button, then save the Administrative Employee to be positive that you'll be able to later edit employees.**

When a Company is selected, the Employee Logon dialog is displayed. This allows an employee to logon to WinVoice™. The password field of the Edit Employee dialog is the string of text that is required by the system before an employee is allowed to logon. **It is possible to leave the employee password field blank, doing so will disable the password function.**

When *Logging On* an employee should first select his/her name from the employee list. The employee should then enter their password. The archive field is used to select which data files to use for this session. Select "current files" to use the most recent data or you may select archived batches of invoices from the Archive list. See: Archive section in this manual for additional information. After this has been accomplished, click on the *Logon* button.

If a mistake was made entering the password, an error message will be displayed indicating an illegal attempt to access **WinVoice™**. Please note that illegal attempts to access various users are maintained in the logs so that you'll be able to see if someone has been trying to access your information.

Note: When a new company is created, one employee is automatically created that is defined as the "Administrative employee". This newly created Administrative employee is named "**SysOp**" and has all security buttons turned on, (with the exception of "Locked out"). The employee password for SysOp is "**system**". See: Companies in this manual.

The Administrative employee (the person responsible for the security of the system), should edit the employee *SysOp*, and modify the information to reflect his/her own information. That person then becomes the administrative employee and can *Create new, Edit or Delete* any other employees.

## Doctors

Doctors in **WinVoice™** are any entities that are to be billed for invoices created. You may have up to 65,000 entries in your doctor list.

By clicking *Doctor->Select/Modify Doctor* from the menu bar, you bring up the Doctor Selection dialog box.

By clicking the *View Options* button, you may change how the entries are viewed in the doctor list. The activities menu allows you to print the contact list which is the doctor list as it appears on the screen for your paper records.

Click once on the doctor's name in the list then click on the View Invoices or View Credits button. Doing so brings up a list of invoices/credits that belong to the highlighted doctor. This is a powerful lookup tool that should be made available to most employees. You should familiarize yourself and your employees that have access to the system, with the *View Invoices filters*, to completely capitalize on this feature. For instance, a doctor calls wondering if a particular patient's case has gone out or not. By clicking doctor, then view invoice, then setting the invoice view options to view all invoices and sort by patient, an employee can tell the doctor in a matter of second when and if a case has been shipped. You could also use the invoice list print feature to give that very same doctor a list of what cases he still has in the lab. A FAX printer driver also helps because you could directly FAX the results to the doctor's office.

By clicking on the *Edit or Create New* buttons you bring up the Edit Doctor dialog box.

In the first grouping of fields, you can enter the mailing address of a doctor as well as other information fields including, tax number, Bank, and Contact Name. *Bill To* is a feature of **WinVoice™** that assigns this doctor's billing account to another doctor or group of doctors. **WinVoice™** uses the Contact Name field when printing Notice letters. For instance, type "Dr. Smith" in the Contact Name field if you want a notice letter to start with "Dear Dr Smith." Territories provide an easy way of grouping several doctors into a single group for reporting purposes. You may wish to use this feature to divide in state and out of state doctors or to give reports on various salesmen.

The next grouping allows you to record a *Voice* telephone number, a *FAX* number, and a *Data* number (or E-mail address) for the doctor in question. This information can be easily accessed later. The *Voice* telephone number will display in the Doctor list dialog if so desired.

The next group contains the default *Shipping* and *Payment* types that can be printed on an invoice when this doctor is selected.

The fourth grouping includes the *Service Charge* field that is applied to each invoice and includes a description. Example: "Handling fee" "1.00"). Also included is an option to *Tax Service Charge* to determine if this service charge should be included while figuring tax and an option to *Charge for Remakes*.

The next section includes the *Tax rate* to be applied to each taxable restoration, metal, design and service charge. The tax will be applied to each invoice. Example: Enter 7.0 for a 7% tax rate per applicable item per invoice. The *Discount* percentage rate entered into this field will be applied to each of this doctor's invoices. Example: Enter 5.0 for a 5% discount to be applied on each invoice created. Remake discount is the discount applied when the invoice is a remake. Enter 100 to not charge for remake invoices.

The *Opening balance* group is the total of this doctor's accounts receivable the day you first begin using WinVoice™. When gathering your doctor's information upon initial configuration, you should determine what each doctor in your list owes your lab to date. If you wish to perpetuate your aging history, divide the total into each field 30, 60, 90, and 120+ old. If your current billing system doesn't track aging history, enter the total amount into the opening balance "30" field. To verify that the totals are correct, click *Doctor->Edit/View opening balances* from the menu bar. **After you have verified that the opening balance fields are correct and all other configuration is correct you should gather all work in progress and log it into the system.** After doing so you will then be able to generate reports showing the status of A/R and Work in Progress.

Note: The opening balance fields will be accurate only until the first period is closed, at which time they are internally used by WinVoice™ to calculate accurate aging history for reporting purposes.

**Caution! The opening balance fields should not be changed after you have verified the totals are correct. Modification of any opening balance field after initial input and verification will completely alter the state of that doctor's billing account and the total amount of the company's A/R during reporting!** If you need to see the current balance of a doctor, please refer to the aging report or view their current period's statement.

The *Interest on Account* field is the percentage of interest that is to be applied to the doctor's account on all past due invoices. It is applied when the period is closed. Example: Enter 1.5 in this field if you intend to charge the doctor in question one and one half percent on the unpaid balance upon closing a period. See also: Periods in this manual.

The *Calls* button allows you to create a record of when you have conversations with this doctor. It is useful for tracking past due doctors, as you will have a list of the various times and notes about each phone call. Example: Dr Smith, I called you on the 14th, the 20th, and the 25th. You said on the 14th, and I quote....

By clicking on the *Create New* button, a timing dialog appears informing you of the length of the call as well as a note field for you to record the reason for the call.

The *Ship to* button allows you to specify where cases should be sent. This is helpful if a doctor mailing address for statements and shipping address for cases (UPS) is different. Use the main address as the address to send statements, and use the ship to feature to send to the UPS account.

The *Fee* button allows you to setup specific prices for restorations, designs, and metals to be used exclusively for the doctor in question. Clicking on this button displays the Doctor Fee Setup Department Select dialog box.

If you click on the logo icon in the upper left-hand corner of this dialog, you can select to copy prices from a different doctor or print this doctors price list. You can also set to raise the prices by a particular percent. Global change means that the default price list will be used plus the percentage you provide. Local, takes the current overridden prices and increases them by the percentage you provide. Place 0 in for the percentage to return back to default fees on all items.

Clicking the *Metal* button will call the Change Default Fee dialog box.

Click on the metal fee to be changed, then enter a fee under Doctors fee. Click the *Set* button to set the price to the right hand side. Use the *Default* button to restore this to the default fee. Click on *Save* when finished. Modifying restorations and designs are accomplished in the same fashion. Select the department to use, then click on the *Design* or *Restoration* button from the Doctor Fee Setup Department Select dialog box. A Change Default Fee Dialog will appear allowing you to modify the default fees to be charged to this doctor.

**Note:** If you enter a doctor's fee that is the same as the default fee. "Default" will continue to be listed in the column on the left.

## Departments

Departments allows you to sub-divide (departmentalize) your restorations and designs, this helps to keep your lists of restorations and designs as small as possible, speeding data entry. Please note that this does not and probably should not conform to the department structure you have created in your lab. Its used to divide billing groups to make data entry easier and has little if no bearing on scheduling for different in-lab departments.

Note: If only one department is configured, the Department Select dialog box, when adding a task, is bypassed. See also: [Invoices](#) in this manual.

Clicking *Config->Departments/Designs/Restorations* will call the Departments dialog box.

By clicking the *Edit* or *Create New* buttons, the Edit Department dialog box will be displayed.

*Tooth/Arch Representation* is defined as how one, two or three clicks are to be represented and displayed on the Tooth/Arch chart when adding or editing a task. The representations can be changed to fit your scheme of operations. See also: [Tooth Chart](#), [Invoices](#) in this manual. If you do not put anything in for One click, you will not be able to select teeth on any task for this department.

Clicking on the *Design* or *Restoration* buttons allows you to modify the design and restoration types along with their corresponding fees/prices associated with this department. See also: [Restoration](#) and [Design](#) chapters for further information.

## Restorations

Restorations are the heart of a dental laboratory. WinVoice™ uses restorations and design types to create and price invoices, schedules case and send accurate statements to your doctors. Restorations are sub-divided by department

It is important to note that the term restoration inside of WinVoice™ does not have to correspond to an actual restoration in your lab. It is better coined as a primary item billed for. Each Task on an invoice must have a restoration selected, so denture labs may want to use restorations for their list of stages.

Clicking the *Restoration* button from the Edit Department dialog displays the Restoration Types dialog.

Clicking the *Edit* or *Create New* buttons brings up the Edit Restoration Type dialog.

You may select *Fee per tooth* or *Fee per arch*, depending on how you wish to charge for the restoration in question. If *Fee per tooth* is checked, each time a tooth is clicked on the Tooth/Arch Chart, one unit increases the restoration fee. See also: Invoices.

If *Is not taxable* is not checked, this restoration will be invoiced and taxed, based upon the Tax field entry for a given doctor.

*Material cost* is how much this restoration costs your lab to produce, with the exception of metal cost. It can be your actual cost if known, or you may approximate the cost. *Material Cost* is used in restoration and cost reports to calculate or approximate profits on each restoration type you produce. This field is optional and may be left blank if you do not wish to track this information.

A *unit* is a number you assign (from 0 to 7) to each restoration. This number 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. See also: Units report.

The section on Doctor Configuration contains additional information about setting up specific restoration fees for specific doctors. Also remember that you can override a fee when creating an invoice. If the price changes on a regular basis, you may wish to leave the fee at 0.00 and inform employees that they should put in the most current price for the item when using it.

See also: The next section on Steps for additional information pertaining to the *Steps* and *Default Steps* buttons.

## Steps

Steps pertain to employee productivity reports and invoice auto scheduling. They are actions to be preformed to complete a particular restoration.

By clicking on the *Steps* button from the Edit Restoration dialog, the Select Step dialog box is displayed.

This dialog displays (from left to right), the step sequence number, the description of the step, the effort of the step, and the piece rate for the step in that order.

Note you can click the icon in the upper-left hand corner and copy groups of steps from another restoration.

By clicking the *Edit* or *Create New* buttons, the Edit Step dialog is displayed.

*Piece rate* is the dollar (or fraction of) amount to be paid to an employee for completing the step. Piece Rate is used to print employee productivity reports that can be used to make piece rate payments to your employees.

The *sequence number* is a number from 0 to 16, which represents the order in which the step should be performed. You may repeat the same sequence number if a step can be performed during the same time frame as another step. The sequence number is used by the Auto Scheduler to schedule your cases. *Production effort* tells the Auto Scheduler how much time to allow for the production of the step. The dummy data is a good example for configuring restoration steps and most labs need only to modify the dummy data to fit their lab's production criteria.

By clicking on the *Default Steps* from the Edit Restoration dialog, the Default Steps dialog box is displayed.

Click on the step in the list box, then select the employee that **in most cases** performs the step highlighted on the left. Then click the Set button to save this employee to this step. The employee chosen becomes the *Default* employee for the given step. This allows you to keep track of step production when invoices are closed, by only indicating exceptions to this rule, (if another employee performs the step). By setting up the default employees, it saves a tremendous amount of time while closing an invoice since most of your steps will already be configured.

## Designs

Your design list can contain descriptions of designs or products your lab might sell. Denture laboratories sometimes use the design list to contain denture teeth and their related prices.

By clicking the *Design* button from the Edit Restoration dialog, the Select Design dialog is displayed.

By clicking on the *Edit* or *Create New* buttons the Edit Design dialog box is displayed.

You may edit the Design fee to be charged based on each tooth clicked on the tooth chart (Fee per tooth) or (Fee per arch) this is identical to configuring restorations. You may also indicate if the fee associated with this design is taxable or not.

You'll note that the layout of designs is very similar to the layout of restorations. This is intentional, to help the learning curve of the software. If you understand restorations, designs should seem very simple in comparison.

See also: [Doctor configuration](#) for more information on setting up specific design prices for selected doctors.

## Metals

The Metals list can contain the metals your laboratory sells and their related prices. Denture laboratories sometimes use the metal list to hold denture teeth or related materials and their prices.

Clicking *Configure->Metals* from the menu bar, displays the Select Metal dialog box.

By clicking on the *Edit* or *Create New* buttons the Edit Metal dialog box is displayed.

*Fee* is what is charged per unit weight of metal. (Unit weight of metal can be pennyweight, grams, ounces etc.). The fee field content is printed on the standard invoices. Don't worry if the fee varies, when you create an invoice you are allowed to override the fee if necessary.

Please note that you should be consistent when assigning units. If you use grams, use grams for all metals presented. This will greatly help to reduce down possible billing errors from employees using the wrong weight value.

*Our Cost* is the amount you pay per unit weight for this metal. This figure is used to calculate profit for each metal you sell and is printed on the metal report. It can be approximated or left blank if you do not desire to track this information.

*Is taxable* allows you to charge tax relating to the sales price of the metal and is reflected on the standard invoice.

The *Note* button allows you to describe the composition of the metal and is printed on the standard invoices. This allows your doctors to know exactly what metal(s) was used to produce the restoration(s) and what elements the metal(s) contains. **Please be aware that the Metal note dialog will allow you to enter as many characters into it as you wish, but they may or may not all are printed on your invoices! Because of the limits of printing area on an 8.5" X 11" piece of paper, each print format is different, most print formats allow only up to 40 characters of metal notes to be printed.**

See also: [Doctor configuration](#) for information for setting up exception metal fees for specific doctors.

## Shipping Types

Shipping types inside of WinVoice™ are used to indicate how an invoice should leave your lab. It also indicates additional time that should be used by the auto scheduler to figure when a case should be completed.

When *Configure->Shipping* methods is selected from the menu bar, the Select Shipping methods dialog is displayed.

This list contains the shipping type name as well as the number of days required to deliver via the shipping method in question. Clicking on the *Edit* or *Create New* buttons displays the Edit Shipping Method dialog. Enter in the name of a new Shipping Type or edit an existing one.

The delivery time is used by the Auto Scheduler to determine if the recommended scheduled completion date will allow for proper delivery via the doctor's usual shipping method. **Entering a zero indicates that a case can be delivered the same day as the scheduled completion date.**

## Shade Types

Shade types are used by WinVoice™ to indicate the color scheme given to a case. They could also be used to give generic information about an invoice since they print on most print formats. Shade types can be typed in on the fly on an invoice. Shade configuration allows you to maintain this list.

When *Configure->Shade* types is selected from the menu bar, the Select Shade dialog box is displayed.

By clicking on the *Edit* or *Create New* buttons, the Edit Payment Type dialog box appears.

Here you may edit an existing Shade Type, or create a new one. You can also use the memory editor utility to modify shades as new ones can be memorized with each new invoice.

## Payment Types

Payment types are used by WinVoice™ to indicate payment requirements for given doctors. If desired it can be printed on invoices, it does not affect doctor statements.

When *Configure->Payment* types is selected from the menu bar, the Select Payment dialog box is displayed.

By clicking on the *Edit* or *Create New* buttons, the Edit Payment Type dialog box appears.

Here you may edit an existing Payment Type, or create a new one.

## Status Types

*Status Types* is an auxiliary list that can be used for tracking information that pertains to your unique mode of operation. It has been included as an optional list and its use is not required.

Clicking *Configure->Status* types from the menu bar, displays the Select Status dialog box.

Here you may create a new Status Type, or edit an existing one.

## Background Config

Clicking *Config->WinVoice Background* option, or the icon in the upper left hand corner of the company select dialog, allows you to modify the desktop used by WinVoice™. Productivity is enhanced when employees feel comfortable looking at the software they are using. This dialog offers several options used to customize the desktop. Employees have the ability to modify their personal desktop.

The main options are *Use color* or *Use bitmap*. Under *Use color*, you can select a solid background or a gradient (which means that hews fade from black to chosen color). To select a solid color, click on the *Tint* button. There are seven gradient color schemes to choose from.

Under *Use bitmap*, you can select to *tile* (checkerboard of the same image), *stretch* (make the image fit on the desktop), or *center* (and use the solid color above to fill in the sides). Click the *Browse* button to select an image, or leave blank to use the PECOS.BMP, which is in the \WINVOICE directory (the cactus/desert scene). Windows™ includes a large number of bitmaps, which are located in C:\WINDOWS, or create your own backgrounds with MS Paint or other software's.

The *dancing cactus* option allows you to turn on/off the icon in the upper left-hand corner. *Reverse gradient* allows you to select to have the black on the top or on the bottom for drawing gradient backgrounds.

# System Config

The WinVoice Development Team strongly believes that for a user to be comfortable with a software package he/she should be able to change most every element of it. That's why the WinVoice™ user is able to change the colors and backgrounds for the user interface. Don't be afraid to experiment with screen colors, if you loose track of what you've changed or are unhappy with the result, you can always return to the defaults quickly and easily by clicking on the *Defaults* button.

By selecting *Configure->System config* from the menu bar, you are presented with the Configuration dialog.

From here, you control most every element of WinVoice™. The top six sections contain the colors that WinVoice™ uses. By clicking on either the foreground or background buttons you get the select color dialog.

Click on the desired color and click the *OK* button.

The first box, *Normal Line* is the foreground and background colors of a normal line in a list box. The second box, *Select Line*, is the color of lines you select in a multi-select list box, like the case list box. *Highlighted Line* is a line that is highlighted but not selected, which is possible in the case list dialog box. *Selected Highlighted* is the currently highlighted line in a list box.

The last box, *Edit Colors* controls the foreground and background of the edit boxes on dialogs. These are the controls you see on your screen where you type in text such as patient name.

The next section, *Miscellaneous Colors*, allows you to change the line color that separates the various lines in a list box. *Stop Color* changes the lines that divide the different information on the lines in a list box. *Bar Color* refers to the default color to use on status boxes. *Dialog Color* is the background color to use for boxes (normally a light gray).

The next section Miscellaneous Options allows you to modify system settings. *Print Tune* allows you to offset printouts for your particular printer. The next button allows you to switch Sound on/off, which will become more useful in future releases of WinVoice™. The last button allows you to turn *Cue Cards* on or off, this button is for future releases and should **NOT** be selected at this time.

# Print Tune

The *Print Tune* button on the Config dialog allows you to fine tune where WinVoice™ begins printing reports on the paper used by your particular printer. When you click on this button, the following dialog appears.

The *Cases*, *Statements*, and *Other Reports* boxes allow you to enter the offset in printer device pixels for the top left corner of printing. This number may be from -32767 to +32767. **Please note that some printers have physical limitations as to where they can print and this setting may not have any effect on your particular printer.**

The starting line down for reports is for what line number to start printing for all reports except statements. The most common setting is 6, as this allows plenty of room at the top of the page for the reports to be bound if desired. Last line allows you to control the bottom margin on a report, the default setting is 66. Different

printers have different physical limitations on how far down on a sheet of paper they can print (many ink jet printers need an additional inch at the bottom, meanwhile, dot matrix printers can print on the very last line of a sheet).

# Invoices

The primary purpose of WinVoice™ is invoice generation and manipulation. Every effort has been made to make this process quick and easy. Invoices are indexed and compressed giving the best combination of speed and size. Invoice files are stored in the individual company directories.

By clicking *Invoice->Select/Modify/Print/Close invoice* from the menu bar, the Select Invoice dialog box is displayed.

The menus at the top of the dialog contain many functions that do not have button equivalents. Line printing the invoice list, custom labels, and other features.

## View Options

The Select Invoice dialog displays your list of invoices, based upon the *View Options* settings. Clicking the *View Options* button brings up the View Invoice Options dialog box.

The default settings for the View Invoice Options dialog box are shown as marked in the above graphic. These setting will give you the most flexibility with fastest sorting speed.

The "Invoice selection filters" section of the View Options dialog offers methods of selecting major categories of invoices. You can select to view invoices that have been *Deleted*, or ones that are *Not Deleted*, or both (*Either*). It also controls whether you view invoices that have been *Printed*, *Not Printed* or *Either*. Invoices that are *Remakes*, *No Remakes* or *Either* and if an invoice(s) is still *Open* or has been *Closed* or *Either*.

The following is one View Options example. Let's say you are looking for a closed invoice that you know is a remake, click on the "Remakes" radio button and the "Closed" radio button and select "Either" for Deleted and Printed. When you click on the OK button, the Select Invoice dialog will contain all invoices that are closed and are also remakes. This is a very powerful look up tool as it can narrow down the size of the invoice list very quickly.

**We recommend that unless you are specifically looking for a particular invoice that you keep the *Invoice selection filters* marked as *Not Deleted*, *Either*, *Either*, and *Open* with the *Sort by* set as *Entered*. This keeps the invoice list filled with the cases currently in production (Work in Progress) and sorted with the most recent invoices at the bottom of the list.**

The "Date Range" section filters invoices by date and is used in conjunction with all other filters. If you select *Don't use date range* WinVoice™ displays all of the invoices that meet the invoice filter criteria. Without the "Don't use date range" checked, you should insure that a valid "Start" and "End" date range has been entered. To select a Start and End date, click on the appropriate calendar icon located next to the date field, then click on

the desired month day and year. You may select to use the received, scheduled, needed, completed, or entered dates to base the date range on. **We recommend the standard setting be, *Don't use date range* - checked.**

Let's use the view filters in the first example. You are looking for an invoice that you know is closed and is also a remake, due to the many invoices your lab creates, over one hundred invoices are displayed in the Select Invoice dialog box. You know that the invoice was completed on the week of December 12, 1995. Uncheck *Don't use date range*, then click on the Start calendar button and select December 12, then click the End calendar button and select December 19th, then click on the *Completed Date* button. When you click on Continue, the Select Invoice dialog box will display only those invoices that were closed and are also remakes during the week of Dec 12-19.

**Proper use of the *View Options* filters can provide important information almost instantly and when combined with the *Print invoice* list function, it can be used in place of many reports. For this reason, we urge you to spend the time necessary to master its use.**

The *Sort by* section controls how invoices are displayed in the list. The most commonly used method is the *Date Entered* due to the fact that it will group your newly created invoices together at the bottom of your invoice list (oldest at top, newest at bottom). This makes batch printing and closing easier since you will most likely print the invoices at the bottom and close the invoices at the top.

*Screen display options* allows you to change between displaying the *Record* number or the *Invoice* number, you also have the option of displaying *Scheduled* date or the *Completed* date in the View invoice list dialog window.

*Record* number is a sequential number that is incremented each time an invoice is created. *Invoice* number is a unique number assigned to each invoice at the time the invoice is created and will not be duplicated under any circumstance during the course of your business. It is used by the system to process and sort data efficiently. Its best to view the invoice number as a barcode number and the record number to be the human readable equivalent of it. An invoice number of 89013902 and a record number of 293 may refer to the exact same invoice (and where it requests a barcode number, you can provide a record number and it should still find the same invoice.) You have the option of printing the *Invoice* number, the *Record* number or both on your documents.

When viewing closed invoices you are generally more concerned as to when the invoice was closed rather than when it was scheduled. The *Scheduled* and *Completed* screen display options allows you to select which date field want to be displayed in the View invoices dialog list.

**The *View Invoice Options* settings (filters), allow for much flexibility as to how invoices are viewed on the screen and sent to the printer. This is a very powerful feature, you should spend the time necessary experimenting with different settings to see how they affect your invoice list. Learn to use various filter schemes to your advantage.**

**When you can't seem to find the invoice(s) you are looking for, the first thing to do is to insure that the *Invoice View* options are set correctly. It is wise to get into the habit of resetting the *View Options* to their original state after they have been changed.**

By clicking the *Search* button from the Select Invoice dialog box, the search dialog box is displayed.

The Search dialog box allows you to move the cursor in the Select Invoice dialog quickly to the invoice you are looking for. This feature is commonly used to find an invoice in your list that you intend to Close or Edit. See also: [Closing an invoice](#).

You may enter in the exact invoice number, record number, type in a partial/complete patient name, or type in a partial/complete pan number.

Selecting *Find in current Inv list*, will take the cursor in the invoice list to the invoice you are searching for. *Edit Inv from anywhere* will search the entire data file for the invoice you are looking for and bring the edit dialog to your screen.

When you click on Continue, WinVoice™ searches for the first occurrence of the search criteria and moves the cursor in the desired invoice in the list.

By clicking the Search button again, you may click on the *Next* or *Prev* buttons in the search dialog box. Doing so will move the cursor to the next or previous occurrences of the same search criteria, if any exist.

## Data Entry

By clicking the *Create New* or *Edit* buttons on the Select Invoice dialog box, the Edit Invoice dialog box appears.

The invoice is divided up into three different pages/tabs. The first page, *Invoice*, deals with the basic information about the case. The second, *Tasks*, allows you to actually build the different items that exist on a case. The final page, *Ship to*, allows you to override the shipping address.

When creating a new invoice, you must first select the doctor the invoice will be billed to. This is important as doctors may have exceptions to your usual fees, default shipping/payment types, and other information needed by the system to properly price the invoice.

There are three buttons next to the fields in the first section. To edit a doctor, click on the small face button next to the doctor. Next to the patient name, is a button to make the case a remake or not. When clicked, it will ask you to provide a reason for the invoice being a remake. Next to the shade name, you can enter in a custom shade note to better describe how the shade fits the invoice.

The *Date* section of the invoice stores when you *Received* the case, when the doctor requires the case; *Needed*, when you plan to finish the case; *Scheduled*, when and if the patient is appointed; *Appointment* and the date the invoice was closed; *Completed*.

**It is possible to enter a completed date when the invoice is created, but it is HIGHLY recommended that you follow the suggested procedure for closing invoices. See: Closing an invoice for additional information.**

By clicking on the *Items Recv* button you will display the Items Received dialog box.

This dialog allows you to select the items that were received as part of a case. This will allow you to keep a permanent record of all items received so you can refer back to it if necessary. Items received are indicated on the standard invoice by **bold** print. You can also change the on screen representations of these different items by clicking the icon in the upper left hand corner and select the option named Edit items.

Next to the *Total Fee* on the Edit Invoice dialog is a button that looks like this . By clicking on this button, a dialog box will be displayed showing the breakdown of all fees, taxes, and charges associated with this invoice.

The Invoice Fee breakdown shows each item's description, its fee and a running total. Asterisks indicate non-taxable items. This is a helpful tool to determine how the system arrived at the total for all charges.

The *Image* button brings up the imaging module. This separate program allows you to store an image to reference later with an invoice. You must have a fully twain compliant scanning equipment to properly use the image capture functions of the imaging module. Or, you can use the *Open File* feature to load a bmp file from disk to store along with the invoice. Click on the *Exit/Save* option to save the image that's on the screen.

The *Calc* button will call a handy calculator for your convenience.

When invoices are sent to the printer, WinVoice™ checks each invoice to see if a *Notice* button is checked on any of the recently entered invoices. If one or more are, WinVoice™ prompts if you would like to print Notice letters.

Notice letters are form letters that can be mailed to your doctors informing them that a case can not be returned on the date the doctor requests. The notice letters are configurable and are stored as FORM.TXT in the company directory. You may either commission WinVoice Development to modify the letters or do it yourself if your skills permit.

## Tasks

Tasks are the procedures noted on the invoice that are to be completed to produce a given case. You may have up to 20 tasks per invoice. Each task must include at least one restoration and can optionally include a design, a metal, metal weight, notes, and steps.

There are two forms of adding tasks to an invoice, either the Line Entry or the Standard Task method. You can switch the default settings while editing a company. To change the style on the fly, click the icon in the upper left-hand corner of an invoice and select either task or line entry styles. Line entry presents a screen full of pull down boxes for your different task restorations as opposed to the add/edit/delete buttons in the standard style. Choose whichever is most comfortable for your laboratory style.

When the *Add Task* button is selected from the Edit Invoice dialog (if there are two or more departments created within a company), WinVoice™ will prompt as to which department to assign the new task.

After selecting the proper department, or if only one department exists, the Edit Task dialog box is displayed.

When adding a task, you should first select the tooth/teeth involved before selecting restorations and designs. This is important because restorations and design fees are usually based upon how many individual teeth or arches are highlighted.

You may click on the "Upper full arch" or "Lower full arch" buttons to quickly highlight an entire arch. This is primarily used to indicate a complete or partial denture, partial or orthodontic appliance with a fee based upon *Arch*.

Each click on an individual tooth may represent a different type of restoration. The department configuration indicates what each click on a tooth/arch represents. One click produces a yellow color, two clicks a gray color and three clicks a red color.

See: Departments for information how to distinguish what each color can represent. This feature is for design convenience and is optional, most labs use it to keep a permanent record of the design of the restoration in case they need to refer back to the invoice at a later date.

After the tooth/teeth in question are selected, select a restoration. The restoration combo box displays the restoration name and the default fee. **If an asterisk is next to the fee, it means that the fee is doctor specific.** When a restoration is selected the default fee for that restoration is displayed to the right. You may override the fee if you so desire.

If there is a design associated with this task, it should be selected next. You may override its fee if necessary. If this restoration requires a metal, select the correct metal from your list. The metal fee, per unit weight, may be modified if necessary. If you know the metal weight, enter it now. If not, when you determine the weight of the metal that was used, make a note of it on both the doctor and lab side of the work ticket/invoice and enter this information into the system when the invoice is closed. See: Closing an Invoice for information as how to edit an invoice when closing.

Clicking the *Note* button of the Edit Task dialog box brings up a Note field dialog that allows you to record notes about this task. Notes can be special instructions as to how to perform the task, or possibly specific instructions from the doctor. The note field is printed next to the task on the standard work ticket. **Please be informed, the Note field dialog will allow you to type as many characters as you wish. However, when printed, the number of characters printed is solely based upon the print format selected. Due to space restrictions most print formats truncate the Note field to 40 characters.**

The *Calc* button will bring up a handy calculator for your convenience.

By clicking the *Step* button, the Record Step dialog box is displayed.

This allows you to record which employee actually performed each step of the restoration(s). The list contains the sequence number, step name, and default employee. **Start and Finish times are for future expansion and are not used by the system at this time.** You can use them for your own personal record keeping information however.

Click on the step at the left, then click on the employee that completed the step at the right. Then click the set button. See: Step configuration for detail concerning default step assignments.

## Scheduling

Manually scheduling a busy lab is a time consuming, sometimes confusing, and usually an inaccurate process. It requires that the person responsible be very knowledgeable as to everything that is going on in the lab. Approximately how long it takes to process different restorations. When the doctor needs a case. How long it takes to deliver to that doctor, vacation schedules, absent technicians and many other variables that most people take for granted.

With proper configuration, WinVoice™ will do an excellent job of scheduling your caseload and possibly let the person now responsible participate more in production.

After configuring shipping types and restorations (more importantly, their steps), you will need to configure the WinVoice™ Company's calendar. The Company's calendar is accessible through the Main Menu, Company option.

Selecting this menu item displays the WinVoice™ Company calendar dialog box.

By clicking the *Prev* and *Next* buttons at the top, you may move between different months.

Each day can be represented by an icon telling the day in the month , that the day is a non working day and should not have invoices scheduled on it , that the day is considered optimally filled , or that the day is exceeding production capacity for the lab . Each day also displays how many units are scheduled to be completed on that day, as well as how many units are considered to be maximum capacity.

To configure the calendar, click the right mouse button on a given day. The Edit calendar day dialog box will then appear.

This dialog allows you to configure each day of the month. If the optimum number of units for your lab to produce per day is 30, enter 30 under the "Number of units to be considered day optimum" field. If the very maximum number of units your lab can produce is 40, enter that value under "Number of units to be considered over capacity".

The next configuration group allows you to indicate how long you plan to work that day. This allows for many different scenarios such as: The day before a holiday, non working holidays, lab only works a half day on Friday, technician leave of absences or vacations.

To configure an entire weekday for the month, click on the weekday header for the day of the week you wish to configure. Example, click with the right mouse button on "Saturday" directly under the *Next* button. When you enter the information, it will then apply to every Saturday on that month's calendar.

To configure the next month, click on the *Next* button, to return to the present month click on the *Prev* button. It's best to configure several months ahead so that long-term cases can be scheduled properly.

Once restoration steps and the Company's calendar are configured and when the Calendar button next to *Scheduled* is clicked (while in the Invoice Edit dialog), you are presented with the Date Invoice is scheduled to be completed dialog.

This dialog is the same as Company's calendar, except that it highlights the date received (blue), date needed (red), date scheduled (white), and the date recommended (yellow), for the case in question.

**Important:** Since it is possible for these dates to overlap, at times two colors may highlight a given date.

Use the information compiled by WinVoice™ to select the Scheduled date for completion. If you agree with the system's selection click on Continue, if you disagree and wish to select a different Scheduled date, click on that date with the right mouse button.

WinVoice™ will allow you to select any date as the date *Scheduled* (for completion) date. Bear in mind the date WinVoice™ selects as the *Scheduled* date is governed by your restoration and step configuration and is only as accurate as that configuration. The suggested *Scheduled* date can be overridden if desired. However, warning messages may be displayed indicating the reasons why WinVoice™ believes you should not schedule

on that date. **IMPORTANT! The date the system recommends to schedule can only be as accurate as the Restoration and restoration Step information configured into the system.**

You may also use the left mouse button to reconfigure a day(s) in the calendar, the procedure is identical to the initial configuration of the Company's calendar.

You should also be aware that when an invoice has been saved, the restoration step configuration information is saved with it, as they exist at the time of saving. **If you later edit a restoration's steps, previously saved invoices are not automatically updated.** Should a recently created invoice need to reflect restoration step changes, proceed as follows: Edit the invoice, edit each task and select the restoration, the system will then use the modified step information to recalculate the recommended completion date. If you reprint the invoice, the new *Scheduled* completion date will be reflected.

## Printing

WinVoice™ allows you to print invoices, work tickets and statements using proprietary print formats. These print formats allows configuration fields to be positioned at will on a page, along with logos, bitmaps, text, lines, and assorted fonts and color preferences. This is one of the most powerful features of WinVoice™ as it allows for inexpensive customization of your printouts to give your lab a distinct advantage over other labs. Personalized invoices and statements complete with logo give a lab a polished feel to a lab and to promote a more business like atmosphere between lab and doctor.

Depending on your programming skills, designing print formats can be a time consuming and sometimes-confusing process. The print engine in WinVoice™ consists of over 350 different commands for positioning different fields on an invoice. For this reason, WinVoice Development offers an inexpensive programming service to custom design your print formats to your specifications. Your system can contain as many print formats as you wish. This allows for limitless printing flexibility and insures that your invoices, work tickets and statements are unique from your competition. **Contact customer sales for ordering information.**

Before you can print invoices, you must first select invoices to print. From the Invoice Select dialog box, click on the invoice you wish to print, it will be then be highlighted by the cursor, then click on the *Print* icon. To select multiple invoices to print, hold down the Ctrl key while clicking on invoices, or click on one invoice and then while holding down the shift key click on another invoice. All invoices in between will be highlighted. Note: Having you invoices sorted by received date insures that they will be listed in successive order. See also: [Invoices, View Options.](#)

You may also select to print all *Unprinted invoices* in your invoice list by clicking *Activities* on the Invoice dialog and then selecting *Print all Unprinted invoices.*

When the *Print* icon is selected, the Select Print Format dialog box appears.

This dialog displays your list of print formats that are currently available for printing, as well as the filename for the formats. The files are stored in the root WinVoice™ directory. The preview button allows you to view the format to the screen before actually executing the print function. Clicking the icon in the upper left-hand corner allows you to load a text editor to modify the print format if you feel you are capable.

**Editing or correcting a botched attempt to modify a print format is NOT covered under your free technical support period. Should you require support for this reason there will be a \$3.00 per minute (\$59.00 minimum) charge. Have your credit card ready before calling support.**

Among the list of print formats is one referred to as Block Format. This format uses the block format button on the dialog box to control the various quadrants on our specialized paper. This gives you an added level of functionality where you can not only select a major print format, but sub-formats as well.

After highlighting the print format and clicking the *Select* button, the Windows<sup>™</sup> Print dialog will be displayed.

This dialog will allow you to select the printer you wish to use and set its options (such as lighter or darker print, the type of paper used, the print quality, and the number of copies of each invoice). This is a powerful and sometimes overlooked feature of WinVoice<sup>™</sup>.

Within the Select printer dialog, you may also select the Windows<sup>™</sup> print driver you wish to use. Some examples of exotic Win95 print drivers are: FAX, second display, disk file, network briefcase, HTML (web) file, and clipboard. If Windows<sup>™</sup> is setup with a FAX print driver, it is possible for you to select an invoice from your list of invoices and quickly FAX that invoice directly to a doctor's FAX machine.

After an invoice(s) is printed, WinVoice<sup>™</sup> will scan the highlighted invoice(s) to check for a *Notice* button turned on. If any are found, a dialog is displayed asking if you wish to *Print Notice letters*.

See: Data Entry, Notice Button for additional information.

If the company file has been configured to, "*Print Custom labels.*" See: Company for additional details. After Notice letters have been printed, (if any), you will be prompted if you wish to print Custom labels corresponding to the recently printed invoices.

Upon selecting *Yes*, WinVoice<sup>™</sup> displays the Custom Label Print Options dialog box.

*Format* is defined as the print format to be used by the system to print the Custom labels. These formats are similar to invoice print formats and allow the same printing flexibility and customization.

The next group contains information about the labels that you intend to print on. Enter the number of columns and the number of labels in each column. ***Make sure no values are zero! This may cause Windows<sup>™</sup> to display a Divide by zero error!***

The last group allows you to tell the system how many labels to print for each invoice. You may enter any number. Select *One label per step per invoice* or *One label per unit per invoice*.

Be sure to properly setup your printer correctly in Windows<sup>™</sup> as to the size of paper you intend to use. Refer to your Windows<sup>™</sup> user manual for information on how to set up paper size.

Please note that all printers are different and not all print drivers are designed the same. Your printer and the current print driver that was installed with it dictates how documents created with WinVoice<sup>™</sup> will be printed. For instance, if your printer does not highlight specific teeth on the tooth charts, tries switching to one of the compatible print drivers that was included with your version of Windows<sup>™</sup>. WinVoice<sup>™</sup> conforms to the Microsoft print driver specifications, so these drivers are usually more stable. You may also wish to go to Print Tune and click the icon in the upper left hand corner which allows you to switch between auto-detect printer, force non-hp, or force hp. Even if you are using a non-hp printer, you may wish to try using the hp print style. The hp style uses DIB printing rather than BITMAP style and can produce a speed improvement if your print driver supports it (a common side-effect of it not working would be that teeth would not be highlighted on the arches).

# Closing

Closing an invoice tells the system that the lab has processed the case and the doctor should be billed for it. **Some reports are not current until invoices are closed. For the system to have real time information, it is important that each day's invoices be closed as soon as possible after the cases have been completed and shipped. It is much easier to use the Close button of the Select Invoice dialog rather than editing an invoice and clicking the Open button and entering a completed date.**

A good system for managing your invoices and reporting real time information is as follows. Enter invoices in batches on the date they are received, print invoices/work tickets to be sent through production. When gold weights are known, make note of it on the doctor's copy and the lab's 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's copy of the invoice/work ticket. You may then, return the invoice/work ticket (doctor's copy) along with the completed case to the doctor. Keep the lab's copy of the work tickets (with gold weight and Total Fee noted), for your hard copy records and audit trail.

Take a full days (batch) of completed work tickets (lab copies) to the computer and close each invoice one at a time using the Close button of the Select invoice dialog and enter the gold weights, if needed. Use the Search button to find an invoice in a large list or sort the list by patient name and begin typing the name, forcing the cursor to the desired invoice. When finished, the lab copies should be added on a calculator, and the total should be checked against the Period report total for that day. If the totals match everything is entered correctly, if not you will need to find the discrepancy and correct it.

The barcode function under the invoice menu gives a quick and easy way of closing invoices. Rather than having to track down the various invoices, you simply pass your barcode scanner over the barcode on your invoice receipt and it pulls the close dialog box on your screen. If you do not have a barcode scanner, you may still get use out of this function, because instead of scanning a barcode you can type in an invoice number or a record number and get the same results much faster than manually looking through your open invoice list. It will also tell you if an invoice has already been closed or not, which is helpful to detect accidental re-printed invoices.

When the *Close* button is clicked from the Select Invoice dialog, the Close Invoice dialog is displayed.

The *Closing Date* is automatically set for the last invoice closed. Change this date if necessary by selecting the calendar button in the *Closing Date* box or by clicking on the up or down buttons. It is important the closing date is recorded correctly, as the system uses this information to compile reports and to produce Statements.

One of the other unique features of WinVoice™ is that it uses real-time statements. The software pays attention to the actual closing **date and time** of an invoice as opposed to just the closing date. This means that you can close a batch of invoices in the morning, end your statement period in the noontime and send out statements, then continue to close more invoices in the afternoon. With other systems, this would disrupt billing, as the invoices later in the day would be assumed to have been on the prior months billing. WinVoice™ uses the time you provide to know which statement they fall on. In our above example, if the invoice was closed with a time prior to noon on the given day, then it would appear on last months statement, if after noon, it appears on next month for the ultimate in flexibility.

**After a day (batch) of invoices have been closed, you should compare the total for the batch against the total for the corresponding day in the *Period report* to verify that your paper records match the system's records. It is very important to make sure paper and the computer match exactly.**

General information about the invoice is displayed below the closing date. You should insure that this invoice is indeed the invoice you wish to close as similar patient names can exist in your invoice file. If you are comfortable that the invoice corresponds with the labs side of the invoice, and all information is correct, you have the option of clicking on the *Continue* button and the invoice will be closed.

If the *Total Fee* isn't the same as what is noted on the labs invoice copy, it is most likely due to the metal weight not being known at the time of the invoice's creation. Click the *Edit* button and you will be presented with the Edit Invoice dialog. Select all Tasks (one at a time) and enter the metal weight associated with that Task. You may also modify any other values relating to the invoice until it balances with the lab's copy. Click on the *Return* button to save the information and then click on the *Continue* button to close the invoice.

A *Steps* button is on the Close Invoice dialog box. If you intend to track employee productivity you must record the steps completed by your employees. Click this button to quickly record the exceptions to the default employees that completed steps while producing this case. Some print formats contain a list of step barcodes that allow employees to quickly scan an employee barcode (which can be created from the doctor/company/employee labels section) as well as the step barcode to record exactly when they have completed a given step.

If your lab prints a final invoice to be sent to the doctor, a *Print* button is on the Close Invoice dialog for this purpose.

After an invoice has been closed, additional editing of the closed invoice requires that you enter the *Reason for editing a closed invoice*. It is highly recommended that you be very careful when editing a closed invoice as you can cause system totals not to balance with your paper records. **This can cause a doctor to be billed more or less than what your paper records indicate.** After editing a closed invoice, (especially any fields that change monetary amounts), you should verify that the Period report totals still correspond with the total for the batch of lab invoice copies of the day in question.

## Deleting a Closed Invoice

It is not possible to delete a *Closed* invoice without first *Opening* the invoice. To *Open* a *Closed* invoice you must *Edit* the invoice and click on the *Open* box in the lower right hand corner of the Editing Invoice Dialog. You are then allowed to delete the invoice. For additional information see *Data Entry* in this manual.

**IMPORTANT!** You should only delete a closed invoice if you are POSITIVE it should be deleted. A closed invoice is supposed to represent a billed invoice. Deleting one of his/her closed invoices WILL alter a doctor's billing account, which is the rational behind the added procedures needed to delete a closed invoice.

## Barcode Lookup

Barcode scanners are devices that turn a sequence of lines into machine-readable text. Most barcode readers are referred to as "wedge" devices because they are placed between your keyboard and your computer. Whenever you swipe a barcode, it sends the characters just as if they were typed in by the keyboard. "Serial" barcode readers work in a similar way, but they have Windows™ device drivers that take the barcode information from the com port on your computer and place them on the keyboard buffer. WinVoice™ stores the invoice number in its printed barcodes.

By clicking on the Invoice->Barcode lookup option, you can use your barcode scanner to edit, close, or edit the steps for an invoice. This is great way to manage large numbers of invoices. Rather than having to use your

mouse to select to edit/close/print/etc, you can simply type in the first letter of the function you are wishing to use. You may also type in the invoice number or record number in this field allowing you to use this convenient function even without a barcode scanner.

## Step Barcode

The Invoice->Step barcode option allows you to quickly scan off employee barcodes, then step barcodes, to record which employee has performed which steps. This procedure is exactly like editing an invoice, highlighting the task, editing the task, clicking the step button, highlighting the step, selecting an employee and filling in an ended time. As you can tell, its much more efficient since it only involves two swipes of the barcode reader. If you need to correct any errors, simply edit the invoice and edit the individual task steps.

To use step barcoding, you must use a print format that includes step barcodes. The easiest method is selecting the Block format and to select "employee steps" for the upper right quadrant on the print format.

You should also print out employee barcodes for each employee. To accomplish this, *click PrnRep->Doc/Comp/Emp labels.*

## Quick Create

Quick create is an option for labs who do not have the time to immediately create a full work ticket for a case that comes in, yet wants a record of its arrival in the computer. Quick create consists of three elements: doctors name, patient name, and pan number. Once this information is entered, it creates a blank invoice in the system that you can later fill in (usually through barcode lookup).

## Find Invoice

Find invoice is a convenient method of tracking cases in the lab. You are able to select between viewing a single invoice via record, invoice number, or pan number, or select a doctor. After selecting a doctor, you'll be presented with a list of all the cases in the system for that particular doctor. After highlighting an invoice you'll be given a breakdown of the invoice including the scheduled steps and if they have been completed or not.

## Payments

Payments consist of Credits and Adjustments. A credit is payments made by the doctor to be applied to his/her account balance and is considered by the system to be income to your lab. Adjustments are account monetary modifications that can be made to balance a doctor's account. Adjustments are not considered by the system as income to the laboratory.

Credits and adjustments are applied to the oldest unpaid invoices in a doctor's account.

# Credits

When you click *Activity->Credit doctor account* from the menu bar, the Credit View Options dialog is displayed.

This dialog allows you to filter how credits are viewed and printed. You may view *All doctor's* credits or a *Specific* doctor's credits. You can view *All active* credits, or just the credits issued during a *Specific period*. You may also select a *Date range*.

After verifying the Credit View Options are set correctly and clicking the *Continue* button, the Credits dialog box appears.

You may at any time change the Credit View filters by clicking the *View Options* button.

Selecting the *Print* button prints the collections report using the current credit View filters as selection criteria.

Clicking the *Edit* or *Create New* buttons will display the Edit Credit dialog box.

The *Received date* tells the system what date to apply the payment (credit) to the doctor's account. The *Amount* field is how much to credit the account. **Positive numbers reduce a doctor's balance.** *Doctor to credit* allows you to select the proper doctor for crediting. Use the *Credit Information* field to record information about the credit, such as the check number or you can optionally type *Thank you for payment*. This field is printed on the standard statement.

# Adjustments

When you click *Activity->Adjust doctors account* from the menu bar, the Adjustment View options dialog is displayed.

This dialog allows you to filter how you view or print adjustments. You may view *All doctors* adjustments or a *Specific doctor's* adjustments. You can view *All active* adjustments that have been entered, or the just the adjustments given during a *Specific period*. You may also select by a *Date range*.

After setting the Adjustment View options, the adjustment dialog box appears.

You may at any time change the view filters by clicking the *View Options* button.

Clicking the *Print* button will print a report showing adjustments, using the current view filters as the selection criteria.

Clicking the *Create New* or *Edit* buttons displays the Edit Adjustment dialog box.

Select the *Doctor to Adjust*. *Date* is the date the adjustment should apply to the doctor's account. *Amount* is how much to adjust a doctor's account. **A positive number increases the doctor's balance, a negative number decreased the doctor's balance.** *Please note that this is the opposite of a Credit.* The *Adjustment info* field can hold the reason for the adjustment and is printed on the standard statement. An asterisk in the amount field indicates that this is a non-taxable adjustment. If you remove the asterisk, this adjustment will be broken down into both a sales figure and a tax figure when it comes to report purposes.

## Inventory

Inventory is an important feature to all labs yet it is frequently overlooked. WinVoice™ helps to maintain your inventory by allowing you to create catalogs of various vendor items and then create purchase orders and reconcile those purchase orders when they are received. It also includes an electronic ordering module allowing you to place orders with PECOSTM or X-Modem equipped servers. Also see the reports section to get breakdowns of stock usage.

## Vendor Config

Vendors in WinVoice™ are any entity that maintains a catalog. Each vendor is assigned a range of barcodes that represent their items. We realize that the dental industry has not yet adapted a barcode system for their products like other industries. By designing WinVoice™ to use barcodes we are hoping to show a need and a use for such a structure. Barcodes consists of 10 numbers, the first five numbers are used to indicate what vendor they belong to. In vendor config, you assign these fist five digits to each company. You provide a range of 0145-0148 for instance. Each range provides a list of 9,999 items. This section is designed to help subdivide your main catalog.

## Server Config

A server is an entity that you place orders from. At first glance, you would expect the same number of vendors as you have servers. But this is not the case in all venues as you may wish to have your catalog subdivided by product barcode ranges and then have each product range order to the same server.

There are three different protocol choices in servers. You must contact the location your wishing or order from to find out which methods are available to you. The first, PECOS, uses the Personal Electronic Ordering System style of transfer of information. The second, X-Modem uses a standard that is typical in the optical industry. The last, FAX allows you to use your FAX printer driver to send the order through your FAX modem and simulate an order in the computer.

## Modem Config

Setup your modem information with this section. It is recommended that you use the auto-config button and only override sections if you are well-versed in modem commands.

# Telxon Config

Telxon units are hand-held devices that allow you to quickly scan off large numbers of invoices. They then attach to your computer through a serial port to upload their information to **WinVoice™**. This configuration allows you to select the various options for this serial port. It is recommend that you leave the default settings unless you're positive that they need to be changed.

# Browsing Catalogs

When you first click to browse catalogs, you are presented with the browse catalog view options.

These options allow you to narrow down your viewing of a catalog. You should first select a vendor at the bottom. Then at the top you can select to search for a particular barcode or a partial description, keyword, category code, and ranges of instock/onorder. Once you click continue, it brings up the actual catalog dialog.

You can sort the catalog using many different methods to help locate the item. When you find the item you wish to order, you can double click on it or use the buttons at the bottom to add to the order list that appears at the bottom of the dialog. You can also create new catalog items from this section or edit their properties.

# Importing Catalogs

There are two different import files that are used in **WinVoice™**. A **PRODUCT.DAT** file and a **PRODUCT.NAM** file. The **PRODUCT.DAT** file contains line after line of barcode number (10 characters), description (50 character), optional price (in 000.00 format), optional category code (3 digits 000), and optional keywords. The **PRODUCT.NAM** file provides a vendor specific product code to represent the barcode. It consists of line after line of barcode number (10 characters) and then vendor specific code (up to 10 characters)

# Placing Orders

Transmitting an order is very simple with **WinVoice™**. Once clicked, it will ask you to check which servers your wishing to send to. Then it asks you which vendors you wish to use. This allows you to send only part of an order if you wish, or to send all orders. **WinVoice™** will continually cycle through the different servers until it successfully sends each order or until the abort button is clicked.

# Billing Periods and Archiving

**WinVoice™** allows you to determine your own billing period lengths as well as store old invoices/credits to optimize system performance. Depending of course upon the size of your hard drive and the speed of your processor, you may never have to delete or "purge" old invoices as with other software.

# Closing a Period

Indicating a date range by which the billing cycle occurs is a standard accounting principle. WinVoice™ allows you to set these dates to match the way you are used to doing business. You could close every two weeks, on the 28<sup>th</sup> of each month, on the 1<sup>st</sup> of each month, on the last day of every month, every quarter, or never at all. Its completely your choice.

You may close a period one of two ways. You may select Close Period from the Activities menu, depicted below.

Or when you select to *Print statements* the Statement Report Options dialog box is displayed. By clicking the *Close* button the Close Period dialog box appears.

The *Closing date* defaults to the current date. **Click on the calendar button to change the closing date if necessary. It is very important that the Closing Date is on or after the date of your LAST invoice for the period to be closed and before your FIRST invoice for the new period.**

When the *Continue* button is selected, WinVoice™ will take a few moments and apply interest to the unpaid balances of all doctors with an interest rate noted in the doctor file. WinVoice™ uses the interest factor specified in each doctor's configuration to calculate the interest charged. You may edit the interest charges before printing statements by clicking on the *Doctor* option of the menu and then clicking on the *Edit Interest Charges* selection.

**Please be absolutely sure of your intentions before closing a period. You should perform a backup before closing the period. Closing a period can only be undone by restoring from a recent backup. Also be aware that it is possible to edit or delete invoices that are contained in a closed period. WARNING! You should NOT edit/delete anything in a closed period unless specifically directed to do so by technical support. Editing/Deleting an invoice in a closed period WILL change all prior period statements and obsolete all prior paper records. But this means that you may also modify closed invoices if you notice a mistake on one of the printed statements and then reprint the invoice without the doctor being any the wiser.**

# Archiving

Archiving allows you to select period(s) that are not referenced often, compress the information and then write it to another part of your hard drive. Archiving trims the size of your invoice file without having to purge old invoices. Archived periods can be loaded during the *User Logon* sequence allowing archived invoices and statements to be reprinted. Note: Archived information can not be changed.

By selecting *Archive files* the Archive Options dialog is displayed.

This dialog allows you to select what periods you want to keep as "current files" and what periods you intend to archive. Select the period you'd like to archive up to and through, then select *Continue*. Depending upon the number of records involved, WinVoice™ will take several minutes to analyze your data files and compress the newly archived data.

Archiving saves a great deal of hard drive space. After several months of heavy usage, your invoice file may be taking up to 4 megs worth of hard drive space. After archiving, the same invoice file will take just a little over 1 meg of drive space.

Not only does archiving save drive space, it speeds processing as well. The same lab after several months of heavy usage may notice a delay when loading the Select Invoice dialog box and an increased amount of time taken to generate statements. This is because WinVoice™ has to search through a multitude of invoices and its progress is governed by the speed of your processor and hard drive. After archiving, old invoices that were required to build statements are no longer needed and are moved to the archive file.

**Note: You should delay archiving until immediately after the current period has been closed! You should also insure that all reports and statements have been printed. We highly recommend that a backup be made prior to archiving in case a power loss is encountered during the archive process.**

You can look back at and print reports from archived files through the *Logon* dialog.

Clicking on the *Archive* combo box allows you to select the archive file to use. After successfully entering your password, WinVoice™ will take a few moments to decompress the archived data into a temporary directory.

**Note: To protect the integrity of your accounting data, attempted changes made to archived invoices and related data are NOT saved by the system.**

To return to the *Current files*, select *Logon* again and select *Current files* from the archive combo box.

Note: It is a good policy to return to Current files after you are finished retrieving archived information. A common mistake is to load an archive to look up an old case, then leave the computer and go back to work. This means that the next co-worker that goes to the system would be confused as to why the invoices on the screen don't match the current workload. A good rule of thumb is to always return to current files before leaving the computer.

## Statements

Statements are the primary method to bill doctors. They provide a printed summary of all invoices created, payments and adjustments made, interest charges, and the overall balance of a doctor's billing account.

WinVoice™ allows you to view or print statements at any time using *real time* information. Statements can be generated and mailed daily, weekly, bi-weekly or monthly. You can send a statement to one doctor or all doctors. You can look at a doctor's statement at any time during the month for real-time account information. However, you must close the period before printing statements, if you desire WinVoice™ to calculate and apply interest charges to your doctor's billing account.

WinVoice™ actually goes through all of your invoices, credits, adjustments, opening balances, and interest charges at the time you request a statement. This has many strengths and many weaknesses. One of the major strengths of this structure is that you can modify old information to correct billing. If a statement is not correct, you can go back through and modify a doctors opening balance, invoices, credits, adjustments, or interest charges to achieve the desired statement. This very same function, however, is also a weakness because a

malicious employee could very quickly disrupt your billing. We suggest that you carefully review the security you give each employee.

## Viewing Statements

Clicking *View rep->Billing->Statements* on the menu bar will display the View Statement dialog box.

You may select the doctor and the period to view. When you select a different period, WinVoice™ will take a few moments to gather the information about each account.

Statements display in this order: Opening balance, pre-period unpaid invoices (if the *Balance Forward* switch is turned off in company configuration), credits (payments), adjustments, old interest charges, closed invoices during the current period, and new interest charges.

It might seem odd at first that the *Open Invoice* statement format option in WinVoice™ can, under some circumstances, show invoices from a prior period. This only happens when a doctor routinely pays less than he was billed. This is a standard open invoice accounting practice and allows you and your doctors to see exactly which invoices their partial payments are being applied to and the invoices that remain unpaid due to the doctor's partial payments. Remember that you also have the option of *Balance Forward* accounting if you so desire. See: [Company Configuration](#) under balance forward.

## Printing Statements

By clicking on the *Print* button from the View Statement dialog box, or by selecting the *Print Rep->Billing->Statement* from the menu bar, the Statement Report Options dialog box is displayed.

You may select to print a statement for the doctor that is currently in the View statement dialog, or select another doctor. You may print statements for *All Doctors*, or just the ones which have had activities during the current period; *Activities only*, or those with *Positive balances*, or those with *Negative balances*. The default setting is *All doctors*.

You can also select to print statements from *previous periods* or to *Close* the current period. See: [Close Period](#) section for more information on closing a period.

*Headers*, controls the format to be used to print statements. *Windowless* prints a header on each statement that has the doctor's name centered at the top of the statement and information about the period above the body of the statement. *One window* prints a statement that has the doctor's mailing address positioned so that when folded, the statement can be mailed in a single window envelope. *Two window* prints your return address above the doctor's address and is designed to be mailed in a two window envelope. *Custom* should be selected if your system contains a custom print format file. WinVoice Development offers custom statement format services for a nominal fee. Contact WinVoice Sales for more information, or you may, if you possess the skills, edit the STATE.TXT file in the company directory. **Note: Should your attempts to edit the STATE.TXT file end in it's corruption, requiring assistance from Technical support to repair the problem, a fee equal to custom statement services will be charged. Credit card or pre-payments can only be accepted.** By clicking the icon in the upper left-hand corner you are able to edit the print formats for each of the statement styles.

The *Statement message* is text that is printed at the bottom of each statement. It may be something such as "Happy holidays" or specific instructions as to where to send payment.

If the *Billing Sum* box has been checked, the billing summary report is printed after the statements. This is just a handy shortcut to help you reconcile your statements.

# Reports

Most reports in WinVoice™ can be visually displayed or printed. This allows you to confirm the information on screen before taking the time needed to print out the reports. Statements are technically a report but they are given a separate section due to how important they are to your monthly activities.

Click once on the report to highlight, then click the *Select* button. In addition to the Reports dialog box, most routinely used reports have their own icon on the button bar to speed the selection process.

## Doc/Comp/Emp Mailing Labels

Mailing labels may be printed for the company or for doctors. The mailing label report does not have a visual equivalent. When you select this report, you are given the Mailing Label Print Options dialog. **It should be noted that Mailing labels differ from Custom labels. The Mailing labels report differs from the Custom Labels report, as the printing format can not be customized.** See: [Invoice](#) section for more information concerning Custom labels.

Within this dialog, you may select the *Print type*. You can select to print mailing labels for *All doctors*, or you may highlight the doctors for which you wish mailing labels to be printed, highlighting is accomplished the same as invoices. See: [Invoice](#) section in this manual for additional information.

*Paper type* allows you to select what type of labels you wish to print on. One, two or three labels wide and the number of labels per column, per page.

The bottom section allows you to fine-tune the placement of the labels, and should only be changed if the printing does not exactly line up on your label paper. By placing numbers into these fields you are changing the size of the paper, in dots, so that WinVoice™ may correctly divide the label paper. The values are different for each printer. We recommend starting out with the number 200, and then increasing or decreasing the numbers until the labels print correctly.

With the Present Company button enabled along with the 3 column paper and 2 labels/col buttons checked the labels would print like this:

Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103	Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103	Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103
Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103	Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103	Demo Company 445 S 55th East Avenue Nowhere, ST 72010-1103

Mailing labels can be used as return labels for your company. Should a doctor(s) be highlighted, labels would be printed showing the doctor name, address, city, ST and ZIP.

## Standard Report Options

Most reports use the generic report options dialog box. This will assist you since you will only have to learn what one set of options represent and you can apply them to all of your report styles. The following is the generic dialog box:

The first section allows you to generate the report for all doctors in the system, or for only a specific doctor or for a specific territory. The second filter is available on the employee productivity and invoice scheduling reports, allowing you to filter based on employee names or departments.

Below you can select to use either all invoices (No filter), or only invoices in a certain period, or only invoices between a certain date range. If you select Period or Date range, you must also select which date to filter the messages by at the left. The last section allows you to use only open invoices, or only closed, or either.

These options are very powerful and allow you to generate a wide range of reports and to get consistent values from the various reports.

## Billing Reports

Billing reports are reports that refer to the state of your accounts receivable. They list what your doctors owe and when the last time they performed work or paid. It's helpful to review this information at least once weekly to help identify potential trouble doctors. They should not be confused with productivity reports. Productivity gives statistics on how much work doctors have done while billing is real-time showing what they currently owe.

## Accounts receivable aging

The Accounts Receivable Aging report shows amounts for invoices that are 30/60/90/120+ past due. It also shows the current balance owed by doctors, and the total of their open invoices.

After clicking *ViewRep->Billing->Accounts receivable aging* from the menu bar, the Accounts Receivable Aging dialog box appears.

The report gives you your 120+, 90,60,30 totals, as well as listings for how much they've currently closed during the month and how much work is still open. It's an invaluable tool to see how your doctors are keeping track with what they owe compared to how much new work they give you.

By clicking on *Show Graph* you can easily see how your receivables are divided.

By clicking on the print button, you can get a hard copy of this graph for your records or for presentation purposes.

# Accounts receivable due letters

The Accounts Receivable Due report gives a list of doctors that have not paid their last period balances in full.

Clicking on *View Rep->Billing->Accounts due summary* displays the Accounts Receivable Due report on-screen dialog.

This dialog displays the balance from the last period as well as credits received and adjustments made during the current period, showing the total unpaid balance with extra fields to give you a good idea on how active this doctor is.

When you click on the *Print* button, individual letters will be generated for each doctor with an unpaid balance. It is a good idea to generate this report on the 15th of the month if you routinely bill at the end of the month. These letters can be mailed to encourage prompt payment. The system uses the Accounts Receivable Due print format and doctor configuration to generate these letters. The basic model should be adequate for most needs. You may edit the print format if you possess the skills, (DUNN.TXT in the company directory) or **WinVoice Development** offers an inexpensive service to custom design *Notice* letters for you.

**Note: Should your attempts to edit the DUNN.TXT file end in it's corruption, requiring assistance from Technical support to repair the problem, a fee equal to custom Notice letter services will be charged. Credit card or pre-payments can only be accepted.**

Clicking on the *Show Graph* button generates an on screen pie chart graphically depicting the information in the report.

This allows you to quickly see which doctor has the highest outstanding balance due. The list on the right is sorted by the most due to least due.

# Collections/Adjustment reports

The collections report and adjustments report are lists of credits (payments) or adjustments (billing changes). It may be selected from the *select reports* dialog, the *select credit/adjustment* dialog, or from the menu under print reports.

It uses the same View options as Credits.

For more information about View Options, see Credits under the Payments section of this manual. The report gives received date, doctor name, credit info, and the amount of each credit.

# Sales tax report

The sales tax report displays number of invoices, the fee charged, the total deductions, and the tax charged for each doctor. The period select dialog allows you to generate 6 month or yearly sales tax reports.

Clicking *View Rep->Billing->Sales Tax Report* from the menu bar, displays the period select dialog and then the sales tax report.

Clicking on *Show Graph* displays the ratio of tax charged to each doctor. The printed version is sub-divided by tax rate to make your federal and state reporting easier.

## Finals report

The Finals report gives a breakdown of the invoices, adjustments, taxes, credits, and interest charges for each of your doctors. It also breaks down doctor billing groups, allowing you to see the performance of individual doctors within a group. To access the Finals report, select *Report* icon or select it from the menu at, *View Rep->Billing->Finals Report*.

Upon selecting the report you are presented your list of doctors, from which you may tag. Use the all or none buttons at the bottom to speed this process.

You will then be presented with an additional set of options to select specific periods to use. This is a good way of getting yearly totals for specific doctors.

Doctor billing groups will appear with their sub-doctors prefixed with ... so that you may see how different doctors contribute to their respective groups.

## Period Billing Summary

The period billing summary is a print only report accessible through the menu at *Print Rep->Billing->Billing Summary*. This report generates totals of activities during selected periods. Selecting the *Billing Sum* option from the print statements dialog box may also access it. Information given includes, taxable sales, adjusted taxable sales, nontaxable sales, adjusted nontaxable sales, sales, adjusted sales, interest charge, tax charged, adjusted tax, collections, active customers, invoices, remakes, units, interest charges (#), collections (#), remake factor, and collection radio.

## Invoicing and Scheduling Reports

These reports give up to the minute reports as to your caseload. They can be used to give lists of which steps need to be completed on which days to keep with the auto scheduler or to give summaries of how busy you will be. Trends can also be seen with some of the reports giving you a good indication of when during the month or the year when you are the least busy for helping to schedule employee vacations. Also it could be used to help plan ordering consumables before rushes hit.

## Units report

The units report lists the invoices scheduled to be completed on a particular date and the number of units associated with each invoice. This report is useful to department heads, as they can quickly see how many units are scheduled to be completed on any given day.

Clicking *View Rep->Invoicing and Scheduling->Units Report* from the menu bar, displays the standard options dialog and then the Units dialog box.

Click the calendar button to select a day to view. You may use the Up and Down buttons to quickly move through adjacent days.

When you print a units report, WinVoice™ divides it into a three column chart per page. Each column shows a list of up to 80 units per day. You can use this chart to quickly see which days are going to be busier than others are and if you have exceeded your daily production capacity.

## Period summary report

The period summary report displays a day by day list of credits, collections, adjustments, invoices, and sales for the current period. This report is helpful in reconciling the system total with your paper total for a period or day within a period.

By clicking *View Rep->Invoicing and scheduling->Period report* from the menu bar, you are given a dialog to select the periods to use and then the Period Daily Summary dialog box appears.

This report should be used to reconcile sales against your lab's paper copies for a given day. It also shows daily Collections (Credits), and Adjustment totals.

Just as the overall period report can determine slow months in your business, the period summary report can indicate slow points of the month. This is important information for scheduling vacations or reordering supplies. Frequent viewing of this report can also alert you to possible downtrends to allow interception before it becomes critical.

The graph displays the ratio of sales, credits, and adjustments.

## Overall period report

The period summary report displays a day by day report of information. The Overall Period report shows a list of the totals for the various periods. **Note: Archived information is not displayed.**

To access the overall period report select *View Rep->Invoicing and Scheduling->Overall Period report* from the menu bar, first the Overall Period Summary dialog box appears.

You may elect to view all doctors or a specific doctor. Upon selecting the continue button, the period select dialog is displayed.

Once you select your periods, the report is generated.

This information can be used to help schedule vacations and for best times to present new advertising. The average sales figure allows you to see how relative each month is to one another.

## Daily report

The daily report displays a run-down of production information for a given day. It shows how many cases were received, how many were scheduled to be completed, and how many were actually completed

To display the visual report, click *View Rep->Invoicing and scheduling->Daily Report* from the menu bar. It uses our standard display options.

*Show Graph* generates a pie chart depicting difference between received, scheduled, and completed for the selected days.

You can use this information to help balance your paper invoice totals. It may also be helpful to verify that scheduled cases were completed. If you create invoices at time of departure rather than at time of receipt, you could also use this report to make sure they were all closed properly.

## Step daily report

The Step Daily report gives a listing of steps to be completed for cases that are scheduled for a given day. This report works in conjunction with the Auto Scheduler. You may use it to give your department heads steps to complete for a given day to help insure that they meet your production schedule. To access the Step daily report either the select *Report* icon or select it from the *View rep->Invoicing and scheduling->Step* daily option from the menu.

Upon selecting the report you are presented with the standard report options dialog and then the Step Daily Dialog box.

Which shows the pan #, doctor, patient, as well as the start and end date for each step. It also shows the employee that has been selected to complete the step. If a case's *Scheduled* completion date is on or before the case's *Recommended* completion date, the Step daily report gives a listing for that invoice for every day between the date received and the date scheduled and lists "Rush Case" in the step start/step end positions. Its best to select single day when generating this report. If there is an asterisk next to the pan number, the invoice has more than one task.

Usually, you will have the open only report option turned on. If the steps do not seem proper, check this setting first, as it is the most common location for errors. By using the closed only option, you can see which steps were completed early and who to commend on their speedy efforts.

## Rush case report

This report identifies cases whose recommended date is later than the scheduled date. The list generated by this report shows which cases that most likely need to be rushed through the lab to meet the completion deadline.

By selecting *View Rep->Invoicing and scheduling->Rush case report* from the menu bar, you are given a list of all rush steps.

If you frequently have steps in this list then you probably need to rethink the layout of your restoration steps since they are listed as taking more time than the person who selected the schedule date allowed.

## Scheduling report

This is a print only report that generates a list of invoices that are scheduled on requested days and printed in landscape. With this report, you may review the following fields: Doctor, patient, pans, units, restorations, date received, date needed, and the fee for invoices. It also gives a check box that you can use when a case is completed. You can give this report to your department heads to help insure that cases are completed on time or post daily in the shipping department to give a checklist of what should be shipped on that day.

## Usage Reports

As the invoicing and scheduling reports can show trends to when you are the busiest and when you would need to order more supplies, the usage reports can provide detailed examination of what you do during these times. They provide breakdowns of the different items you bill for and can give profit margin analysis of what you charge for the items compared to what it costs you to produce them. Some reports, like the tooth and shade report, will provide you with interesting statistics on the industry.

## Restoration report

The restoration report gives a listing of restorations completed. It's a good way to check to see where your strengths and weaknesses are and how to best promote your business. It could also be used to give doctors discounts based on volumes of particular services completed. The relationship between number of restorations and the actual units of the restoration is also shown.

By clicking *View Rep->Usage->Restoration report* from the menu bar, you are given the standard options and then the restoration dialog box displays.

The printed report gives Our Cost of each restoration. If you click the *Show Graph* button, the restoration pie chart options dialog box appears.

This allows you to view a pie chart based upon either *Units* of restorations or *Value* of restorations.

## Design report

The design report gives a breakdown of the different designs you've used and their values. Some labs use designs for actual billing items so this report becomes as valuable as the restoration report. For other labs, it's a

good generalization of the type of work your lab does most. Which can be incredibly valuable in selecting potential employees by testing them with your most common types of work.

To display the visual report, select *View Rep->Usage->Design Report* from the menu bar. It uses our standard display options.

*Show Graph* generates a pie chart allowing you to see either the differences between units or the value.

## Metal report

The metal report lists each metal along with how many cases used each metal during the period, the total weight of metal used, the total charged for the metal, the total *our cost* for the metal, and the resulting profit from the metal. Use this report to help predict reorder values and to determine if excessive amounts are being used.

Clicking *View Rep->Usage->Metal report* on the menu bar will display the standard report options and then the visual metal report.

The graph will depict which metal you use most often, based upon total cases.

## Misc Charge report

Each invoice can have a miscellaneous charge listed on them. This report shows you which miscellaneous charges were created and how many. If there are enough of a certain charge, you might consider creating a restoration or design type of the same name for more advanced tracking of it.

By selecting *View Rep->Usage->Miscellaneous Charge report* on the menu bar will display the standard report options and then the visual misc charge report.

## Shade report

Each invoice allows you to select a shade. It's informative to have a list of the most commonly used shades, especially for reordering supplies.

Selecting *View Rep->Usage->Shade Report* from the menu bar, displays the standard report options and then the shade report dialog box.

## Cost report

The cost report gives a comparison of the material costs and the fee charged allowing you to see your profit from the completed case. It helps you to judge how profitable each restoration is. It also clearly identifies the effects of remakes on profit. This report is accessible from either the *Report* icon or from *View Rep->Usage->Cost report*. It uses the standard report options dialog to select doctor, date range, and open/closed/either.

The printout slightly differs from the on screen variety by replacing the invoice number with task#'s restoration name to help you better determine where your profit is derived from. The printout also provides the profit percentage per invoice to help you quickly determine which cases are below your minimum profit margin. Clicking on *Show Graph* will display your cost/profit ratio in a pie chart.

## Tooth report

The tooth report displays how many of a given tooth were selected. It then also gives a breakdown on how many were yellow, red, or gray teeth. This report in itself is fairly useless for business concerns but can give powerful insights into the world of dentistry. This report is accessible from either the *Report* icon or from *View Rep->Usage->Tooth report*.

## Ship report

Most labs have several methods of shipping. This report helps to reconcile your payments to shippers and possibly to help evaluate changes in shippers or consolidation of routes. This report is accessible from either the *Report* icon or from *View Rep->Usage->Ship report*.

## Service charges

Service charges tend to be a hidden part of invoices that most labs do not take into account while billing for their services but over time account for a good part of income. If completely ignored, they can also cost profit. This report gives a breakdown of service charges on invoices. Since some labs use the service charge field to record shipping charges, this report can help reconcile your shipping payments. This report is accessible from either the *Report* icon or from *View Rep->Usage->Service charge report*.

# Productivity Reports

Productivity details how active your doctors and employees are. Doctor reports can be used to judge when your accounts may need additional advertising or rewards. Employee reports could be used for piece rate payment of work done in the lab.

## Doctor checkup

Doctor Checkup displays information similar to the Accounts Due report but lays it out differently, concentrating upon doctor's current work.

To display the visual report, select *View Rep->Productivity->Doctor Checkup Report* from the menu bar.

It's a quick report that can be generated, the helpful phone number field means that you can keep this report on your screen and make your callbacks.

## Doctor productivity report

The Doctor Productivity Report generates information showing total sales generated by each doctor, the number of units that represent those sales, their percentage of the total number of units for the period, the number of remakes, the percent of remakes, and the laboratory remake factor.

By clicking *View Rep->Productivity->Doctor productivity report*, brings up our standard display options then the Doctor Productivity dialog box appears.

When you click on the *Show graph* button, the *Doctor Pie Chart Options* dialog is displayed.

You may select to see a pie chart based on the *Remake factor* of each doctor, the production *Value* of each doctor, or the *Units* sent for each doctor.

## Employee productivity report

You may track the steps that your employees complete. This report displays the steps and the employee that completed them.

Clicking *View Rep->Productivity->Employee productivity* from the menu bar brings up the standard report options then displays the employee productivity summary.

Note: Steps is number of these steps performed. The printout is level broken by employee name.

## Employee steps report

The Employee Steps report gives a list of completed steps for a given employee. At a glance, you can see how productive your employees are.. To access the Employee Steps report, select *Report* icon or select from the menu at *View Rep->Productivity->Employee Steps*.

Upon selecting the report you are presented with the standard report options and then the employee steps report.

## Work report

This interesting report gives a list of how many seconds it takes for your employees to create invoices. Over time you should see employee speed ratings increase with their familiarity of WinVoice™. As the speed ratings level, you may ask if there are any suggestions on how to rearrange restorations/designs/departments to help an already comfortable employee to even higher data entry speeds. Or if one employee's speed is much lower than another, you may ask the faster to show their techniques to the lower. To access this report, select *ViewRep->Productivity->Work report*.

## List Reports

List reports are print only reports that give you a hard copy of your configuration. They can also be used to give handy phone and data entry aids to your employees.

### Doctor list

This report prints a complete configuration list of your doctors. Please note that it is so detailed that it can only print two doctors per page. Which means if you have 100 doctors, it would print out 50 pages on your printer.

### Contact list

Use this report to make a calling list of phone numbers for doctors. It will make your billing department's job much easier since they will have a hardcopy of names and numbers. You may also wish to use the export to cardfile function under the doctor's menu and use the cardfile program that's included with earlier versions of Windows™ to have a Rolodex version of the doctor's information.

### Restoration list

This report prints a complete configuration list of your restorations. Please note that it is so detailed that it can only print a few per page so make absolutely sure before printing this list.

### Step list

This report prints a complete configuration list of the steps for each one of your restorations. Please note that it is so detailed that it can only print a few per page so make absolutely sure before printing this list.

## Price list

You may select which doctors to generate a price list for. This will show each one of your billing items and the specific prices for the doctors.

## Time Clock Reports

These reports give you summaries of information gained through the time clock program included with Net. They are especially useful for paying employees.

### Time daily report

The daily report gives a breakdown of time-per-time when employees clocked in and out. It also provides a reason if one is given. It can be used to give an employee an exact explanation of their total time.

### Time summary report

This report gives total hours, minutes, and seconds worked during a given time frame.

## Inventory Reports

Inventory allows you to track your supplies and to verify that the orders you place are received in full. They can also be used to track shrinkage in your stock to help identify potential trouble spots.

### InStock report

The instock report gives a list of how many and the total value of the items you currently have in the lab. When selecting the report your able to select which vendors you wish to view. This report is very helpful for evaluating your net worth for bank purposes as well as for insurance.

## OnOrder report

Use the onorder report to view what you are expecting to arrive. It could also be used to see what items were ordered and have never arrived or where substituted for other items.

## Usage report

See your most commonly ordered items. This helps you identify which items you should reorder more of ahead of time. You can click on the items on the visual report and edit them.

## Broken report

Help control breakage by identifying which items were broken and taking steps to prevent it in the future.

## Utilities

Utilities are auxiliary programs that operate independently from the main **WinVoice™** program, they serve to enhance the capabilities of **WinVoice™**. It's possible to create shortcuts/icons to run these utilities without first executing the main program. Calculator and card file are two such useful programs. See your Windows™ documentation for usage instructions.

## Backup

A wise man once said. *"The only data ever lost is data that was not backed up"* **WinVoice™** is equipped with a powerful backup and restore utility. Using our built in backup utility will allow you to backup up to 4 megs of information on a single diskette. It is very important that you discipline yourself in its routine use! Nothing can be as frustrating as spending hours entering data into a computer and losing everything because of a power spike or drive failure. ***We suggest that immediately following your first session using WinVoice™, that you do your first backup.***

To backup, click *Utilities->Backup* from the menu bar. Once the backup program is loaded, select the Backup radio button. Accept the default in "Source Path" (usually C:\WINVOICE\), insure that the "Destination" drive is correct (usually A:\ for a 3 1/2 floppy). Place a newly formatted diskette into the appropriate destination drive and click on the "OK" button.

We advise that you backup at least once a day. A good backup routine is as follows:

You will need three new sets of diskettes, label them as Backup **1**, **2**, and **3**. Start your backup routine by first backing up on disk 1, make a note of the date on the label. The next time (day) you backup use disk 2 and the

next time you backup use disk 3. Assuming that you backup daily, after three days you will have three diskettes, number **1** with one days information, number **2** with two days information and number **3** with three days information. The next time you backup, rotate back to disk number 1, and so on. If you experience data loss, restore with your most recent diskette, assuming you have a successful restore session, you will be able to restore all information up to the last date noted on the diskette. If for some reason your most recent backup diskette is unreadable, go to your next most recent backup diskette and so on. Remember that diskettes eventually wear out and can be accidentally corrupted by static electricity! You should periodically replace your backup diskettes with new ones on a regular basis, we also suggest that you periodically run *Scandisk* (a Microsoft utility program) or other disk utilities to check your diskettes for errors. See your Window's manual for additional information on *Scandisk*.

**WinVoice Development** can **NOT** guarantee the safety of your data, please serve yourself well as it will be impossible for us to assist you in restoring data without a current readable backup diskette(s) available.

To run **WinVoice-Backup**<sup>™</sup>, double click the *Backup* icon in the **WinVoice**<sup>™</sup> group (or click the Backup shortcut in the **WinVoice**<sup>™</sup> group). **WinVoice-Backup**<sup>™</sup> 's main dialog will then appear.

Insert a blank formatted floppy into the drive and then click the OK button. *Please note that your data may require more than one disk to complete the backup procedure.* When you click the OK button, **WinVoice-Backup**<sup>™</sup> proceeds to take every file in the directory specified by the "Source Path" field, their sub-directories and compress them. It then places as much of this compressed data onto the "Destination" drive/path as possible. It will prompt you for additional disks until it has copied all of the compressed data.

*Note: Only ONE backup is on one disk.* If you place a disk that already has a backup in the drive, it will be **OVERWRITTEN**. Be very careful to keep your disks organized.

Depending upon the speed of your system and the amount of data, this procedure can take a great deal of time, as every file will be backed up. If you wish to save time, you can backup only your company directory by adding it to the end of the source path (ex: C:\WINVOICE\DEMO). It is **VERY** important that the path be correct. See the diagram above for a working example.

To restore your data, make sure the paths appear the same as they where when you backed up originally, and then click the *Restore* button, and then the *Ok* button.

## Time Clock

The two external time clock programs included with **WinVoice**<sup>™</sup> replace the standard on-the-wall time clocks. The first version of the software is a Windows<sup>™</sup> software that's designed to either use a barcode scanner or to allow the employees to select their names from the screen. The other version is DOS software that uses a barcode scanner (see Doc/Comp/Emp label report on how to print employee barcodes.) To use the DOS software outside of **WinVoice**<sup>™</sup>, simply place the complete path to your company's files on the command line of the software. `TMCLKD.EXE C:\WINVOICE\DEMO` would run the time clock software for the demo company. This allows you to configure multiple machines to run for multiple companies. **WinVoice**<sup>™</sup> can then be run to gather reports on total times worked.

## Step Tracking

**WinVoice™** has an internal function for recording steps, but we were well aware that many labs have older DOS machines from previous software packages that were gathering dust. Step Tracker is DOS software that is launchable through **WinVoice™** or through the command prompt that allows you to scan barcodes to record steps (see Doc/Comp/Emp label report on how to print employee barcodes.) A DOS machine must be connected to the network and must have the server **WinVoice™** directory shared to it for it to function properly. The command line for the step tracking software must include the full path to your company's files. This allows you to have multiple copies of the step tracking software running to support multiple companies. For example STEPTRKD.EXE G:\WINVOICE\DEMO\ would use the demo company's information for step tracking. An easy way of getting DOS machines on a network is first installing a network card. Attach a barcode scanner. Then install software referred to as MS Client that is downloadable from Microsoft's web site. Disk copies of the MS Client install is obtainable through **WinVoice Development** for a 10 dollar shipping and packaging fee.

## MemEdit

MemEdit allows you to modify the memorized fields contained in **WinVoice™**.

Select the field type at the left. The list at the right will then load with the various memorized items. You may then select to edit, add, delete, or completely clear the list.

## PECOS

PECOS is our Personal Electronic Catalog Ordering System developed to allow you to use your modem to send orders to various vendors. This option will operate when PECOS or WinPECOS is installed on your computer. PECOS and WinPECOS are obsolete with the new built-in inventory features of **WinVoice™** but since the data files do not migrate from PECOS to **WinVoice™** you may access your old information through these shortcuts.

## Card File

Card file gives quick access to the Windows™ program by the same name that is included with Windows™ v3.1. To export to the card file format, see the option under the doctor menu.

## Miscellaneous Functions

There are several other features built into **WinVoice™** to assist you in getting the most out of your computer. These functions are accessible through the Company menu on the desktop.

## Reminders

Reminders allow you to set messages that will pop up on given days. They can be used to remind you of an important meeting with a doctor or your spouse's birthday. You can access this feature by clicking on *Company->Reminders* menu you are presented with the calendar. Left clicking on a given day asks you if the note is to be just for you, or for any employee that logs on during that day. Then it brings up a note field edit

box, here is where you place the reminder. To clear a reminder, click on the day and delete the text from the edit box.

## E-Notes

E-notes can be used to post notes to another user. This feature allows you to manage your time more efficiently by communicating on the computer.

To write an E-Note, click on the *Company->Write E-Note* option, and you are presented with the E-note dialog.

When this employee logs on, they are presented with a prompt indicating they have an E-Note.

If they answer Yes, the E-Note will appear on their screen.

The title bar will tell them the date and time the E-Note was written they could reply to the E-Note by clicking the *Reply* button. If you wish this E-Note to appear as new again the next time you logon to **WinVoice™** remove the check mark from the *Read* box.

To re-read old E-Notes, select *Company->Read E-Notes*.

An asterisk next to the date indicates the E-Note has been read.

## View Logs

This handy feature allows you to determine who's been doing what with **WinVoice™**. By clicking *Company->View logs*, you are given a log of everything that has happened this month.

## View Users

You can easily tell whose currently using **WinVoice™** by using this function. Clicking *Company->View users*, gives you a list of the login names and when they logged in. Similar information can also be gotten through the DOS software called WINWHEN.EXE in your \WINVOICE directory or the Windows™ 32 bit system tray program named WINWHN32.EXE.

# Tips and Tricks

- ! You can quickly edit an item by double clicking on any item contained in a list dialog box
- ! Double right clicking on a list box will allow you to export it to a tabbed delimited file.
- ! Having just one department will bypass the Task select department dialog.
- ! The menu under the title of each dialog gives quick access to all available functions as well as little known functions (company select screen has main background configuration, select invoice has print mailing labels. etc.)
- ! Clicking the icon in the upper left-hand corner of a dialog brings up additional features.
- ! Using a plain background color instead of a bitmap or gradient speed screen redraws. Tiled bitmaps are faster than stretched or centered.
- ! If you don't want an invoice to be counted towards the Units Report or Daily report, leave the scheduled date blank. This will require that you hand write the scheduled date on the work ticket if needed.
- ! A routine daily backup procedure can save a great deal of grief if something goes wrong.
- ! Rearrange dialog boxes so they are comfortable for you to view. **WinVoice™** remembers where you place them.
- ! Keeping the *Open* view filter selected along with the *Received Date* sort method selected while in Invoice View options will display the list of invoices that are currently working in the lab. This also keeps the list relatively short and easy to manage and forces the most recently created invoices to the bottom of the list making the selection of invoices to print as fast as possible. Let's assume that you have just entered ten new invoices. A method to quickly select the invoices to print is: Click on the first invoice with the left button of your mouse, while holding the left button, drag the cursor down to the last invoice entered, thus highlighting all ten invoices. Click on the *Print* button to print the invoices.
- ! Use a disk defragmenting software to defrag your drive at least weekly. Windows™ and disk caches work more efficiently when your hard drive is defragmented. MS-DOS 6.0 and above has a program called *Defrag*. Win95 has Disk Defragmenter found as the Programs->Accessories->System Tools taskbar item. Also routinely run *Scandisk* or other drive/file repairing software. With Win95 *Scandisk* can be found has under Programs->Accessories->System Tools taskbar item.
- ! Lists are sorted alphabetically. You can place letters or numbers before a restorations, designs, metals, shipping types, payment types, etc. Your list will then be sorted by the first letter/number, this can force your list to sort as you wish.

- ! If a combo or list box is highlighted, begin typing in the name of what you are looking for. The cursor will be moved to the option you typed in. By using the prefix lettering approach suggested above, you can simply type "B" or "F" and the restoration you are looking for will quickly be highlighted
- ! You may want to create a new employee called "Casual User", then set very minimal security options for the newly created employee (minimum-security options would be NO security buttons checked). Casual User will then be able to look up cases but won't have access to other areas of the system.
- ! If you prefer to type more than point and click, a quick way to close a batch of invoices is as follows: Use View Options while in the Invoice Select dialog to set the View filters to *Not Deleted*, *Either*, *Either* and *Open*. Set the Sort method to *Patient*. Click on *Don't use date range*. You will need to click on the Search button to find the first invoice in your batch of invoices to close. After closing the first invoice, press *Enter* and start typing the name of the patient on the second invoice to close, the cursor will quickly move to that invoice when enough letters have been typed to make the name unique. Press *Enter* and the Close Invoice dialog will appear. If all information is correct, just press *Enter* again to close the invoice and begin typing the next patient name. The only time you will have to use the mouse is if you must *Edit* an invoice before closing it.
- ! Click on the icons in the upper left-hand corner of each one of your Windows<sup>™</sup> and if available any sub-menus. Some of them have special hidden features. For instance, on doctors fee setup (See Config: Doctors for more information), by clicking on the icon, you are given the option to copy fees from another doctor rather than having to completely re-enter the fees.
- ! A tip to optimizing WinVoice<sup>™</sup>'s performance over a network is to move the DLL's from the WinVoice<sup>™</sup> directory into EACH of the machines \WINDOWS directories. The easiest way to do this is to click Start->Programs->MS Dos Prompt. Then typing `XCOPY F:\*.DLL@`, and pressing ENTER. And after doing the last machine, typing `XDEL F:\*.DLL@`. This will reduce your network traffic and speed up loading of WinVoice<sup>™</sup> by having a local copy of the subsidiary files that WinVoice<sup>™</sup> uses. One word of caution however, if you receive an update, you will need to repeat the moving of DLL's procedure.
- ! See the online help for lists of TPF commands. Your old TPFs can be modified to fit the new `Amulti-page@printout` by adding a comma and a number of tasks to fit per page, after the TASK\_BEGIN line.
- ! Use the 32 bit version of the software if you are using Windows<sup>™</sup> 9x or NT. 32 bit software utilizes resources better as well as interfaces with the cache to gain large speed improvements.

## Support

If you have a question about WinVoice<sup>™</sup>, you may not have to call technical support to find the answer. Try these steps first:

- ! All dialog boxes have a Help button. By clicking on it, you will be given additional information about the dialog you are currently in. The button bar has a main help icon that will take you into a hypertexted table of contents. Here you can find specific information about the functions of WinVoice<sup>™</sup>.
- ! Check to see if the topic you are looking for is in the index at the end of this documentation. Many

subjects don't have chapter headings but can be found via the index.

- ! Terminology sometimes may be misleading, check the glossary in this documentation first.
- ! Make sure you press OK or Continue for any error message that WinVoice™ displays before attempting to make repairs. It is very common for someone to get a "Limited to one node" message, then do a network repair then try and run WinVoice™ again, but the copy of WinVoice™ that displayed "Limited to one node" still hasn't been told it could exit yet.

If you are having a problem with WinVoice™, try these steps before calling technical support.

- ! **Exit WinVoice™ and Windows™ and restart computer.**

Select the exit icon from the button bar, then select "Shutdown Windows". WinVoice™ uses temporary directories and files that may have been corrupted by system events. By reloading WinVoice™ and Windows™ these files are regenerated. You may also have to run Network Repair before reloading WinVoice™ to clean the WinVoice™ temporary files.

- ! **Analyze the problem.**

If something used to work, what has changed?

Have you installed other software since originally installing WinVoice™? WinVoice™ may be looking for a file(s) that could have been overwritten by the other software.

Is the problem reproducible? Are you able to exit WinVoice™, reload and duplicate the problem? Have you tried both the 16 and 32 bit versions of the software? Some problems may be related to drive caching or other system glitches. Remember to check the *View Options* dialog that relates to the function you are running. **Many support calls relates to not being able to view or print something that the user knows is in the system. Having *View Options* set incorrectly will cause this "perceived" problem!**

Is the problem isolated to WinVoice™? If the problem is printing, are you able to print from another Windows™ software? If you are able to print reports but not invoices, check the .TPF files.

Is the problem Windows™? Technical support deals only with WinVoice™ problems refer to Microsoft or your computer manufacturer for support concerning Windows™.

If you unable solve your problem and need technical support, be sure to follow these guidelines for the quickest and easiest and least expensive response to your questions.

- ! **If an error message appears, write down the exact wording of the error message.**

Technical support will not be able to help you if they do not know where the error happened and what the error was.

- ! **Have your original install disk handy.**

Support files on diskette or a reinstall may be necessary.

- ! **Have backup disks handy.**

A restore from your most recent backup may be necessary.

- ! **Have information pertaining to the hardware (computer) you are using.**

Type of processor (386/486/Pentium). Amount of RAM (8/16 meg). Free drive space. Windows™ version (Windows™ 3.1/95/NT). DOS version. Printer manufacture. Network configuration.

Directory WinVoice™ was installed to.

- ! **Be next to you computer with it running when you call.**

Technical support will ask you to run through the procedure and describe what is being displayed on the screen and suggest ways to correct the problem.

**! Allow sufficient time when calling and disable *call waiting* on your phone.**

Determining the problem and laying out a solution may take time. Make sure you have the time to spend uninterrupted, on the phone, at your computer.

You may also E-mail or FAX your questions to **WinVoice Development** at tyancy@winvoice.com or **1-918-627-7842**. Only E-mail and FAXS with the following information will be answered, so be sure to include: Your name, laboratory name, registration number, return address, return E-mail address or FAX number, voice phone number, and the best time to reach you.

Your problem will be researched and an answer to your question(s) will be returned via E-mail or FAX as soon as possible. There is no charge for this service at the time of this printing. However, we reserve the right to change this policy at anytime without notice.

## Glossary

<b>Administrative Employee</b>	The employee of a company that has total security privileges.
<b>Accounts Receivable Letter</b>	A text file that is used to format the design of the print out that is sent to doctors who are past due on they're accounts.
<b>Adjustment</b>	Corrections to a doctor account. Can be positive or negative.
<b>Archive</b>	A compressed collection of invoices and credits. After the archiving function is preformed the data may be recalled at any time by selecting the data file during logon.
<b>Backup</b>	The process of storing the <b>WinVoice™</b> information and placing it in a safe location in case of system failure or operator error.
<b>Closing</b>	Indicating that an invoice is complete and should be billed to the doctor.
<b>Collection</b>	A credit (payment made by a doctor to your lab).
<b>Company</b>	Your lab or a business. <b>WinVoice™</b> allows multiple companies
<b>Completed</b>	An invoice that has been closed and charged to a doctor's account.
<b>Credit</b>	A Payment/Collection from a doctor. Credits are applied to a doctor's oldest invoices.
<b>Department</b>	An example of a department is Crown and Bridge. You may have as many departments as you like, having just one department bypasses the Department Select when adding a Task.
<b>Design</b>	A specific style to follow when producing a restoration.
<b>Doctor</b>	Individual or business that has authorized work on an invoice and who will be charged for the invoice.
<b>Employee</b>	An individual who is authorized access to <b>WinVoice™</b> or who is used to record steps completed.
<b>Interest</b>	An amount charged on unpaid balances, (that are older than the start of the last period).
<b>Invoice</b>	A record of services to be preformed for a doctor.
<b>Logon</b>	To start a <b>WinVoice™</b> session. To logon, select an employee name, enter the correct password and optionally, select the archive you wish to use.
<b>Metal</b>	Material used to create a task. Generally has a weight associated.

<b>Notice Form Letter</b>	A form letter that can be printed and sent to doctor(s) informing them that a case can't be completed in the time allowed. Notice button on invoices must be toggled on. See text file.
<b>Opening Balance</b>	The total amount a doctor owes your lab before the start of the first period. The software changes this information when archiving occurs. Opening balances should NOT be changed after verified as being correct.
<b>Password</b>	A unique sequence of characters kept secret that is used to secure companies or parts of <b>WinVoice™</b> from unauthorized use.
<b>Payment Types</b>	How an invoice is to be paid for.
<b>Period</b>	A completed billing cycle, normally every 28 days. Periods are used for statements to indicate when billing begins and ends.
<b>Remake</b>	An case or invoice that has been processed before.
<b>Restoration</b>	A procedure that is to be preformed when processing a case. Restorations have steps and units assigned to them.
<b>Sales</b>	Closed invoices that are billed to a doctor.
<b>Scheduled</b>	When an invoice/case is to be completed and shipped.
<b>Shipping Types</b>	How the invoice/case is to be returned to the doctor.
<b>Statement</b>	Indication of how much a doctor owes. Statements show invoices that have not been paid for.
<b>Status Types</b>	Optional field not used by most labs.
<b>Steps</b>	A set of procedures that must be preformed to complete a restoration. Steps can be assigned to individual employees when invoices are created, thereby tracking employee productivity and piece rate payments.
<b>Tasks</b>	A restoration or groups of restorations to be produced and to be invoiced. Each task consists of teeth selected (optional), a restoration(s), a design (optional), a metal (optional), metal weight (optional) a note (optional), and steps (optional).
<b>Text File</b>	An ASCII file that is used by <b>WinVoice™</b> to format a printed report. See .TPF, Notice Form Letter, and Accounts Receivable Letter.
<b>.TPF</b>	A type of text file that is stored in the root directory of <b>WinVoice™</b> . It is used to format printed reports. Assistance in creating a custom .TPF is available from <b>WinVoice Development</b> . See also: Text file.
<b>User</b>	Anyone logging onto system. See Employee
<b>WinVoice™</b>	Refers to software copyright 1995-98 by Tom Yancy & Associates, Inc.
<b>Windows™</b>	Operating system software trademark Microsoft Corporation

# Index

New	Technical support .....	57
Features.....		6