

winVoiceTM Version 2.6



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Concept

Five 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 utilizes 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. **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. Print format changes can be accomplished by a savvy computer user or if you prefer, **WinVoice Development** offers custom design service for a nominal fee. This is a powerful feature that allows you to print your documents the way YOU like!

WinVoice[™] printing formats utilizes 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.

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. **WinVoice-Lite**[™] is specifically designed for the smaller lab that is interested in automatic case scheduling. **WinVoice-Pro**[™] offers more powerful features and reporting that larger labs find important, such as employee production management, piece rate payments and multi-level security tailored for each employee.

Networking is a valuable time saving tool that can benefit both small and large labs. Networking with Windows 95 is as easy as installing a 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. **WinVoice-Lite**[™], **WinVoice-Pro**[™], and **WinVoice-Net**[™] utilize the same data formats, this makes upgrading to a more advanced version quick, easy and painless.

New Features

WinVoice™ v2.6 (from v2.0)

- ! **New controls.** Standard windows controls, such as list boxes, combo boxes, and edit boxes have been replaced by our own code. This greatly enhanced the operating speed of our software and allows more flexibility. List boxes were most notably changed.
- ! **System configuration.** Allowing customization of screen colors.
- ! 2 new doctor **sort methods** help to find doctors in your list easier.
- ! **View Credits** button on doctor list screen, works the same as the View Invoices button.
- ! New, easier, **search for invoice** feature. Added **search by pan number**.
- ! **Redesigned invoice screen.** More attractive and easier to use.
- ! New **“memorization”** fields. The shade/status/misc charge/payment fields have been replaced by memorization fields. Allows for the addition of items *On The Fly*, that are automatically saved.
- ! New **up/down a day buttons** on all date fields. This helps to speed data entry.
- ! **“Clickable” reports.** On most visual reports, a magnifying lens will appear over fields that can be clicked to provide additional information.
- ! Double clicking on a day in the **company calendar** will give you a list of the invoices on that day.
- ! New **“print tune”** function allows you to delicately offset the position where reports line up on your paper.
- ! Added **last credit**, and amount to the Accounts Receivable report.
- ! Pop-up view options before executing the invoice list.
- ! **“Batch Invoice”** company switch. When on, after an invoice is created, will ask if you wish to create another. A time saver, since the invoice list does not have to be reloaded after every invoice creation.
- ! **New mailing label** print options.
- ! Accounts receivable due report now has **percentage reporting**.
- ! Added **Employee steps report**.
- ! Title bar of doctors list now reports **sum total of doctors in your list**.
- ! Default view options on company edit screen lets you insure that your default view option settings are saved.
- ! Print invoice list and contact list reports added.
- ! **Overall period report** allows you see totals for all periods in the system, also allows you to filter by doctor.
- ! Many improvements were made to existing reports. New fields, and faster execution.
- ! **Print pie charts feature** added.
- ! New **“moveable” button bar**. Scroll left or right, rather than having first page and second page.
- ! Two new invoice list sort methods. Doctor and pan.
- ! Print all *Unprinted* invoices.
- ! Print invoice list.
- ! Imaging
- ! Doctor group billing
- ! Numbered tooth charts

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. **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!*

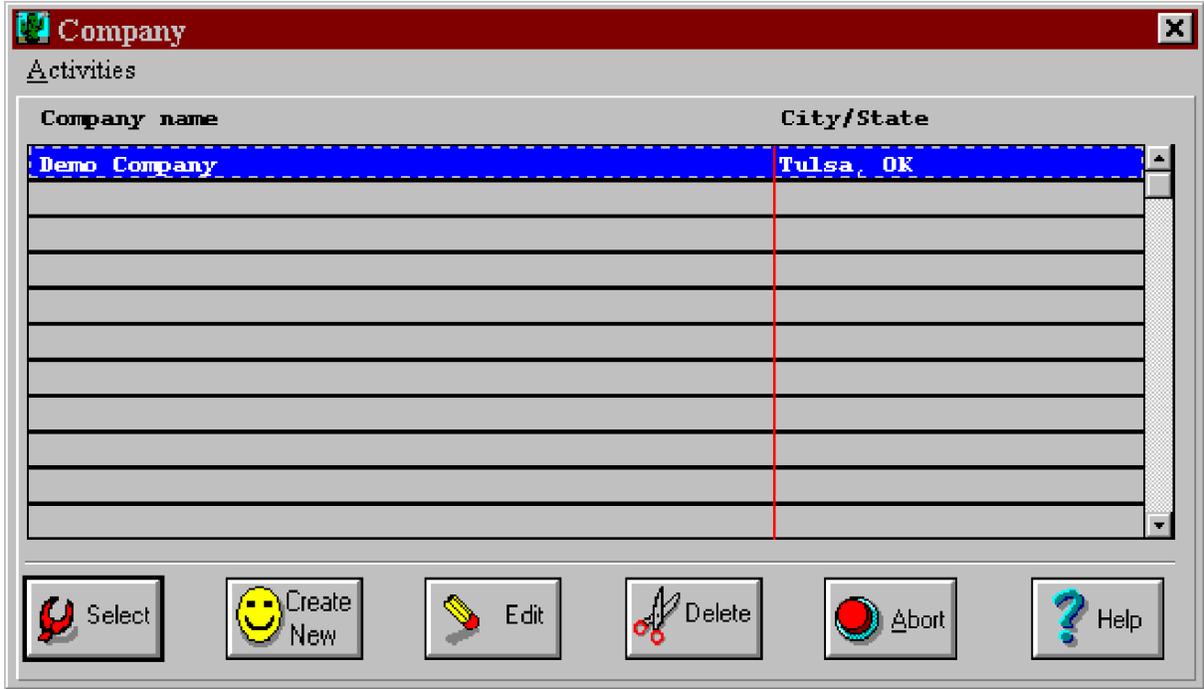
WinVoice™ is designed to allow you to customize most every element. To ease configuration, all *lists* utilizes the same basic "list-select-edit" design. This greatly reduces the learning curve required to use the program and enables you to quickly maintain configuration lists.

Companies

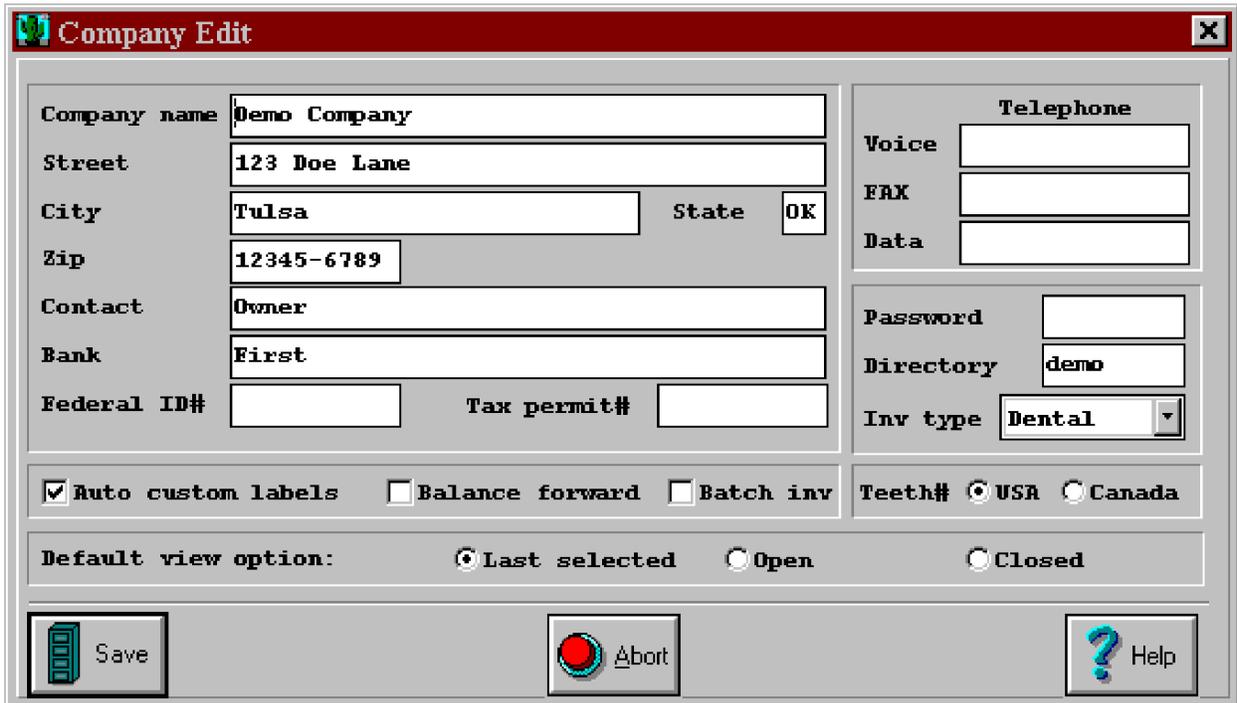
WinVoice-Pro™ and **WinVoice-Net™** allow invoicing/billing for multiple companies. A company in **WinVoice™** is any entity that needs to maintain a doctor/account list. This feature is commonly used by labs that operate two or more businesses under one roof and use different names for each business. 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.

Note, your company name is hardcoded at the time of shipping. This prevents other labs from using your purchased copy of **WinVoice™**. Please make absolutely sure that the company name listed on the blue invoice receipt is exactly as you are wanting your company name presented. If not, contact customer sales IMMEDIATELY, do NOT open the enclosed sealed diskette protector. If, in the future, you decide to change your company name, a name change disk will cost \$49 plus shipping. This is a radical change from prior security measures which only allowed **WinVoice™** to be run on the computer originally installed upon. This locking in of the company name allows you to make backups of your lab and move them to home computers for further report study or usage.



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



Most dialogs are divided into boxes, the first box 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.

The second box of information 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 box of company configuration 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 a password into 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!**

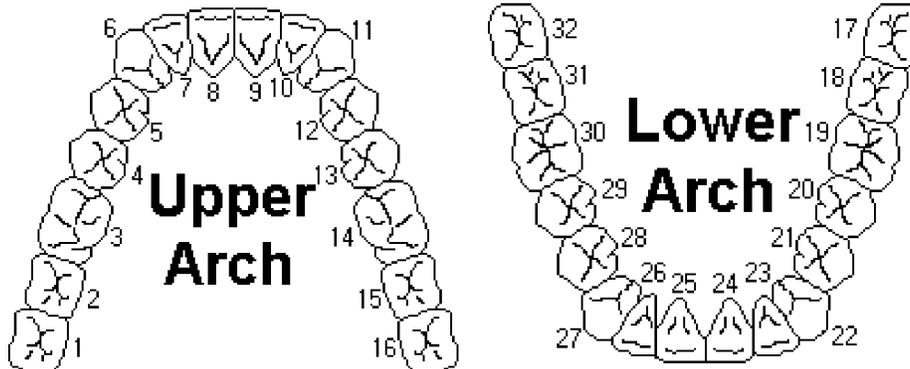
The *directory* field is where on your hard drive **WinVoice™** is to place the company's data files. This is a standard DOS directory filename, it must be 8 characters or less and may NOT contain spaces or punctuation characters. The company directory will become a sub-directory of the root **WinVoice™** directory. For instance, let's 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".

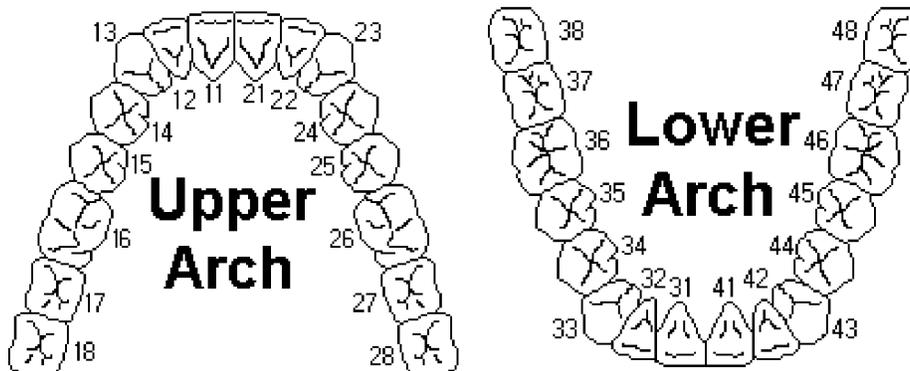
The *Print Custom labels* check box allows you to select if you wish to be prompted to Print Custom labels after the printing of invoices. If a check is in this box, the Custom label dialog box will display asking if you wish to print Custom labels after you print an invoice. Custom labels are different 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 Inv* checked, you will be prompted if you want to create a another invoice after saving a new one.

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.

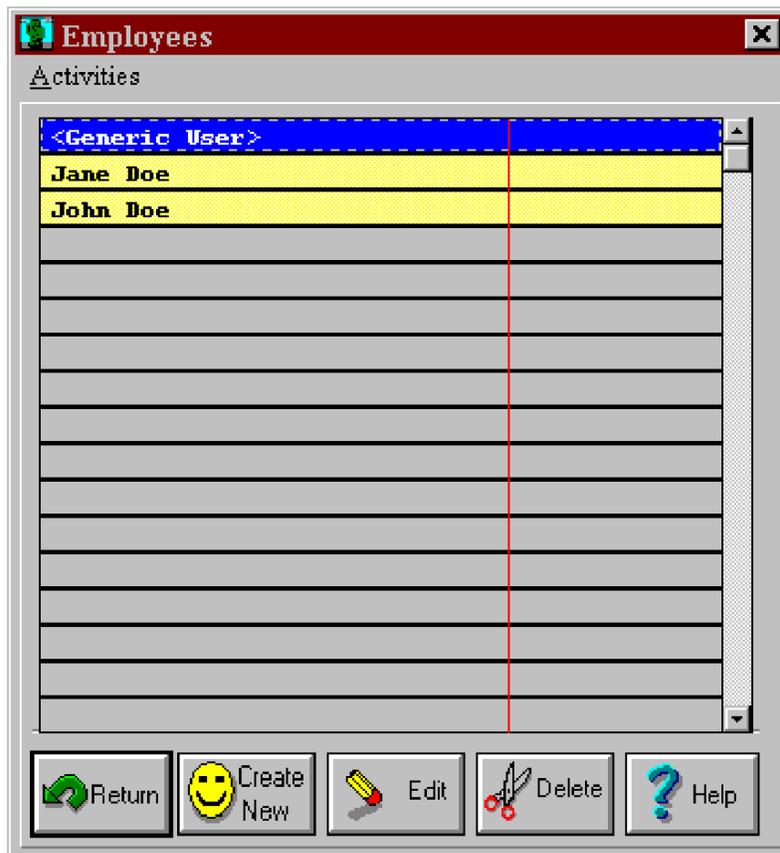
See: *Employee* section of this manual for additional information as to how to edit/create employees.

Employees

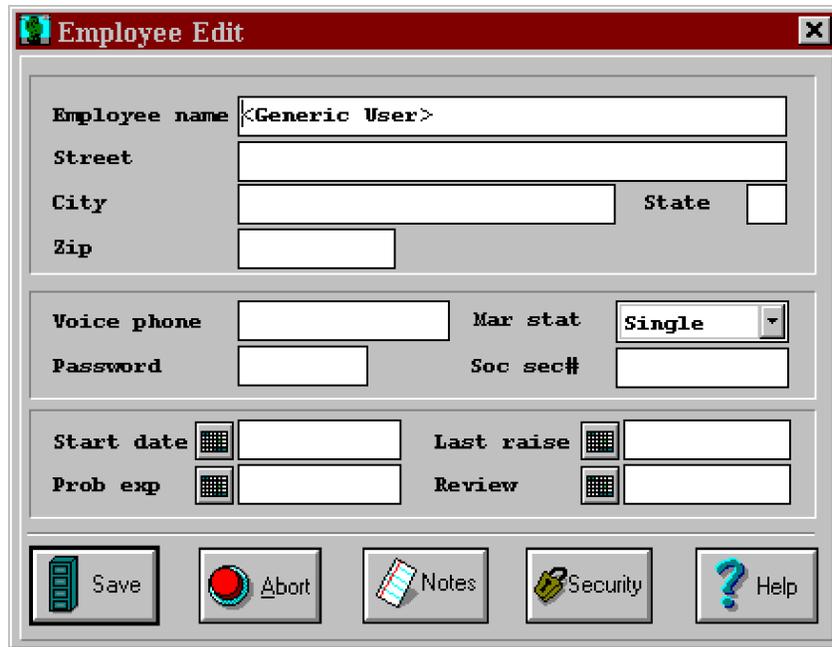
The Employee function of **WinVoice-Pro™** and **WinVoice-Net™** allows the Administrative Employee to restrict access to different areas of the system for every other employee.

By clicking on the *Emp* icon  from the second page of the button bar on the desktop or *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.



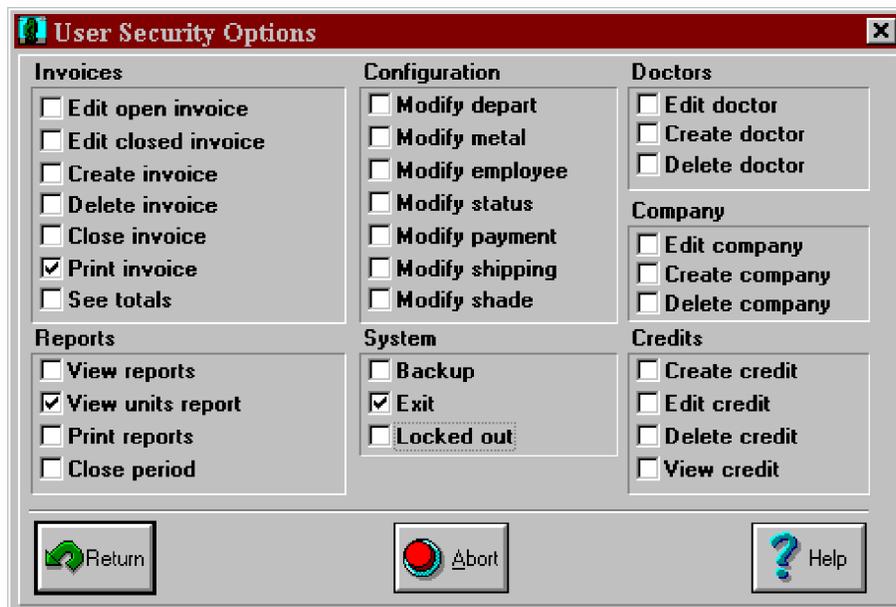
Clicking on the *Edit* or *Create New* buttons will bring up the Edit Employee dialog.



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. 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 to. You may restrict each employee's access to **WinVoice™** as much or as little as you feel necessary.

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!

The following is a synopsis of the different security buttons and how they effect security.

Invoices

<i>Edit open invoice</i>	Allows an employee user to edit an existing invoice.
<i>Edit closed invoice</i>	Allows an employee user to edit an already closed (and as such, should remain unchanged) invoice. A "reason for editing closed invoice" box will be displayed upon editing a closed invoice.
<i>Create invoice</i>	Allows an employee user to create a new invoice.
<i>Delete invoice</i>	Allows an employee user to delete an open invoice. Note: Closed invoices can not be deleted.
<i>Close invoice</i>	Allows an employee user to close an open invoice.
<i>Print invoice</i>	Allows an employee user to print an invoice and its associated form letter.
<i>See totals</i>	Allows an employee user to see the total number and fee of invoices when the select invoice screen is active.

Configuration

<i>Modify depart</i>	Allows an employee user to create, edit, and delete departments.
<i>Modify metal</i>	Allows an employee user to create, edit, and delete from the metals list.
<i>Modify employee</i>	Allows an employee user to create, edit, and delete employees.
<i>Modify status</i>	Allows an employee user to create, edit, and delete the status types used in an invoice.
<i>Modify payment</i>	Allows an employee user to create, edit, and delete the payment types associated with invoices.
<i>Modify shipping</i>	Allows an employee user to create, edit, and delete the shipping types associated with invoices.
<i>Modify shade</i>	Allows an employee user to create, edit, and delete the shade types associated with invoices.

Doctors

<i>Edit doctor</i>	Allows an employee user to edit a doctors information (includes Opening Balance function).
<i>Create doctor</i>	Allows an employee user to create a new doctor.
<i>Delete doctor</i>	Allows an employee user to delete a doctor.

Company

<i>Edit company</i>	Allows an employee user to change a company's information.
<i>Create company</i>	Allows an employee user to create a new company.
<i>Delete company</i>	Allows an employee user to delete a company.

Reports

View reports Allows an employee user to use the "view" style reports. Note: does not exclude the Units report.

View units report Allows an employee user to view the units report. Note: this commonly used report is separate from the main view reports security option.

Print reports Allows an employee user to use the printed reports functions.

Close period Allows an employee user to close the current period.

System

Backup Allows an employee user to use the backup function.

Exit Allows an employee user to exit **WinVoice™** when logged on.

Locked out With this button toggled **ON**, an employee will not be allowed to logon. **USE THIS BUTTON WITH CARE! The Administrative employee should not have this box checked. If so, the Administrative employee will no longer be able to logon to WinVoice™.**

Credits

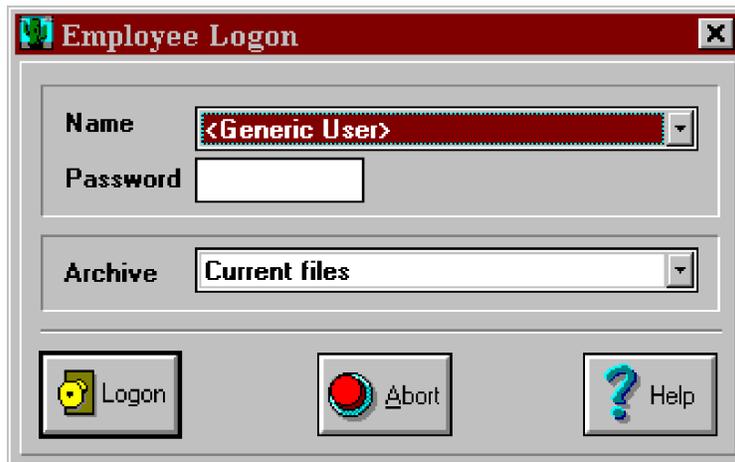
Create credit Allows an employee user to create a new credit/adjustment for a doctor.

Edit credit Allows an employee user to edit a credit/adjustment.

Delete credit Allows an employee user to delete a credit/adjustment.

View credit Allows an employee user to access the Select Credit/Adjust function. Without this security feature enabled, a user may not create, edit, or delete.

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**[™].

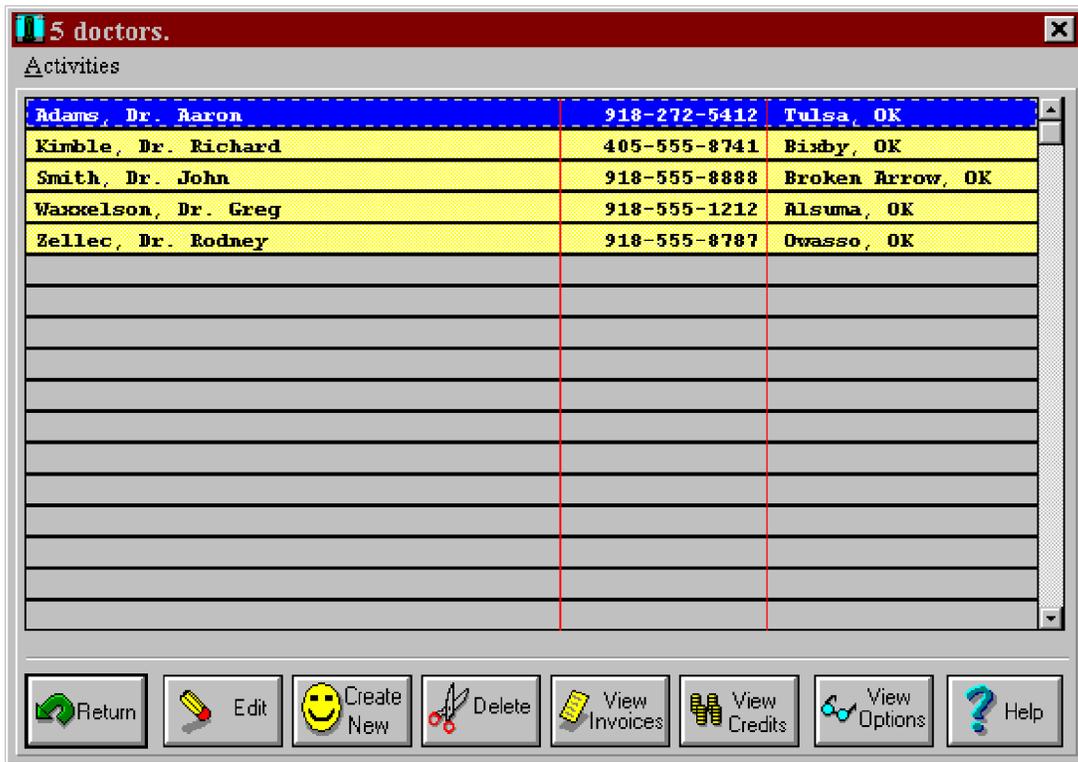
Note: When a new company is created, one employee is automatically created that is defined as the "Administrative employee". This newly created Administrative employee is named "**SysOp**" and has all security buttons turned on, (with the exception of "Locked out"). The employee password for SysOp is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

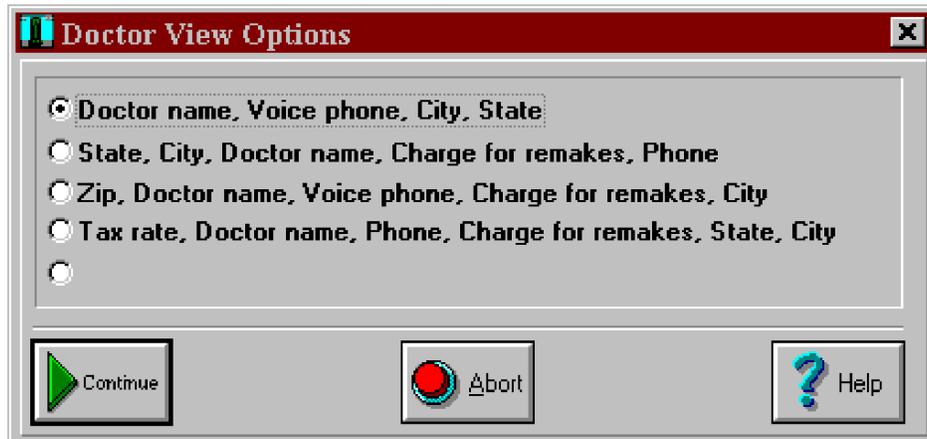
Doctors

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

By clicking on the *Doc* icon  from the button bar or *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.



When a doctor is highlighted (by clicking once on the doctor's name in the list), you may 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.

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 that assigns this doctor's billing account to another doctor or group of doctors. The Contact Name field is used by **WinVoice™** 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,".

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 *Discount* percentage rate for this doctor. A discount factor 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. 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 *Service Charge* field is also applied to each invoice and includes a description. Example: "Handling fee" "1.00"). Also included is an option to *Tax Service Charge* and an option to *Charge for Remakes*. If the *Charge for Remakes* check box is left blank, and a newly created invoice is marked as a *Remake*, the doctor will be charged only for the metal and miscellaneous fees noted on that invoice.

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 *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 ageing history, divide the total into each field 30, 60, 90, and 120+ old. If your current billing system doesn't track ageing history, enter the total amount into the opening balance "30" field. To verify that the totals are correct, click on the *OpnBal*

icon , located on the second page of the button bar or *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.

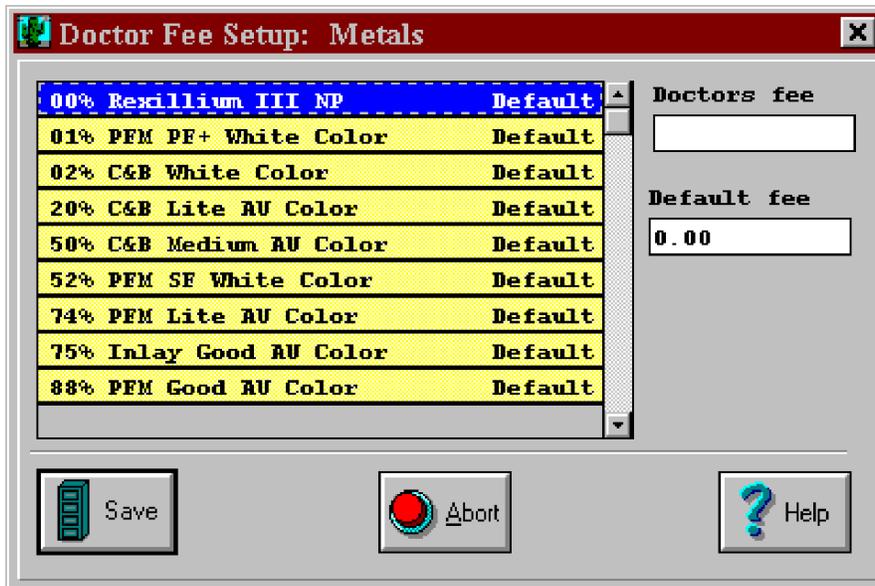
Note: The opening balance fields will be accurate only until the first period is closed, at which time they are internally used by **WinVoice™** to calculate accurate ageing history for reporting purposes.

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!

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.



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 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.

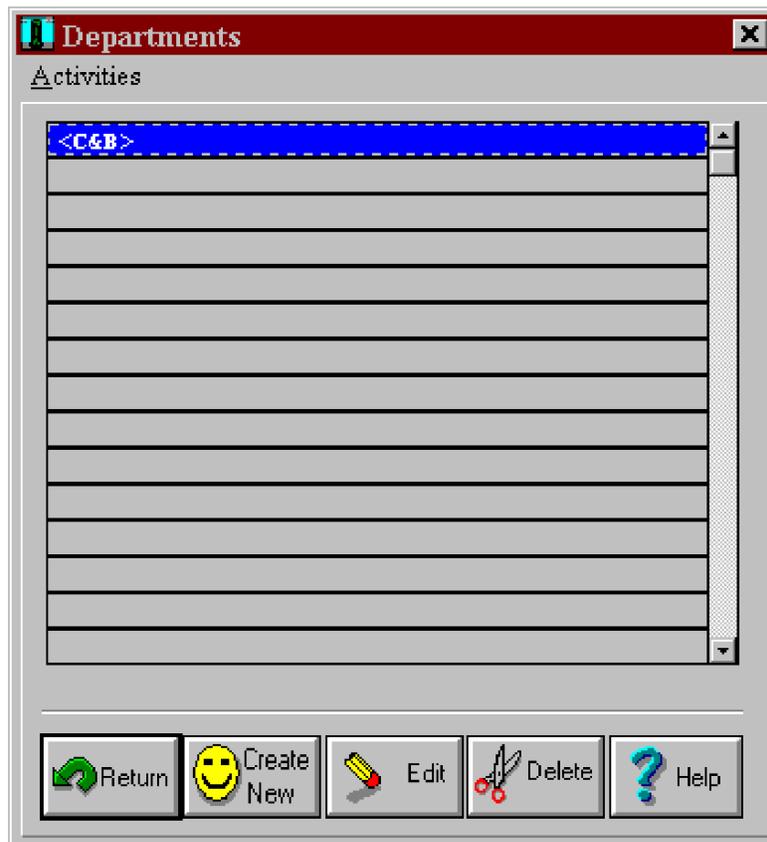
Note: If you enter a doctor's fee that is the same as the default fee. "Default" will continue to be listed in the column on the left.

Departments

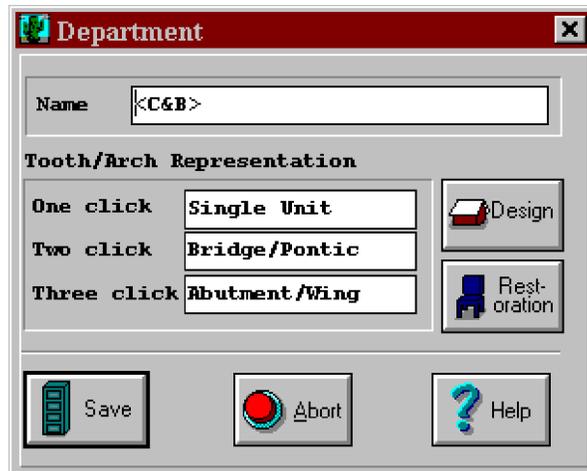
Departments allows you to sub-divide (departmentalize) your restorations and designs, this helps to keep your lists of restorations and designs as small as possible, speeding data entry.

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 the *Depart* icon  or *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.



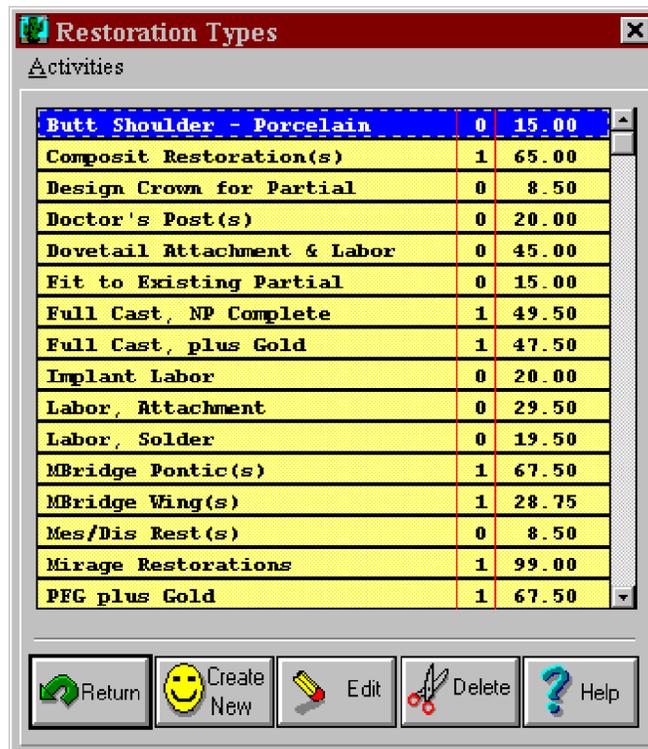
Tooth/Arch Representation is defined as how one, two or three clicks are to be represented and displayed on the Tooth/Arch chart when adding or editing a task. The representations can be changed to fit your scheme of operations. See also: [Tooth Chart](#), [Invoices](#) in this manual.

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, schedule cases and send accurate statements to your doctors. Restorations are sub-divided by department

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



Restoration Type	Quantity	Price
Butt Shoulder - Porcelain	0	15.00
Composit Restoration(s)	1	65.00
Design Crown for Partial	0	8.50
Doctor's Post(s)	0	20.00
Dovetail Attachment & Labor	0	45.00
Fit to Existing Partial	0	15.00
Full Cast, NP Complete	1	49.50
Full Cast, plus Gold	1	47.50
Implant Labor	0	20.00
Labor, Attachment	0	29.50
Labor, Solder	0	19.50
MBridge Pontic(s)	1	67.50
MBridge Wing(s)	1	28.75
Mes/Dis Rest(s)	0	8.50
Mirage Restorations	1	99.00
PEG plus Gold	1	67.50

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

Restoration Type

Name: Butt Shoulder - Porcelain

Fee: 15.00 Fee per tooth?

Material cost: 0.00 Fee per arch?

Units(0-7): 0 Is not taxable

Buttons: Save, Abort, Steps, Default Steps, Help

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, the restoration fee is increased by one unit. 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.

Units 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 preconfigured 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.

See also: The next section on Steps for additional information pertaining to the *Steps* and *Default Steps* buttons. Steps pertain to employee productivity reports and invoice auto-scheduling.

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 AutoScheduler to schedule your cases.

Production effort tells the AutoScheduler 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.

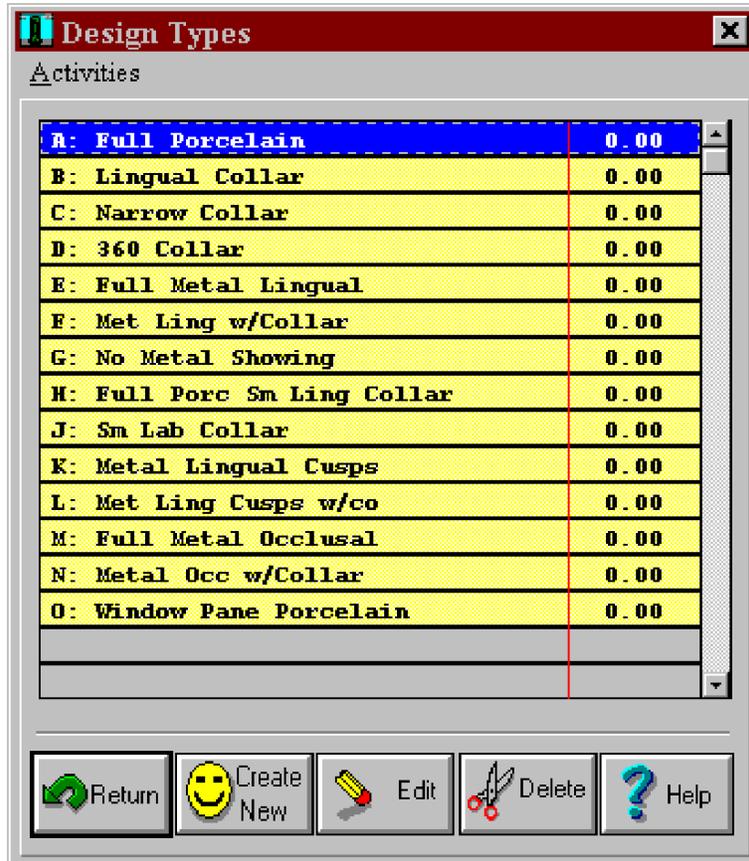
By clicking on the *Default Steps* from the Edit Restoration dialog, the Default Steps dialog box is displayed.



Click on the step in the list box, then select the employee that **in most cases** performs the step highlighted on the left. 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).

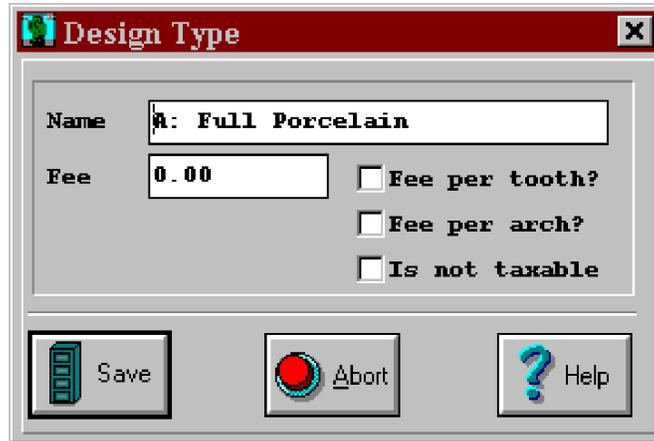
Designs

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



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 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.

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

Metals



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

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.

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 contents 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.

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.

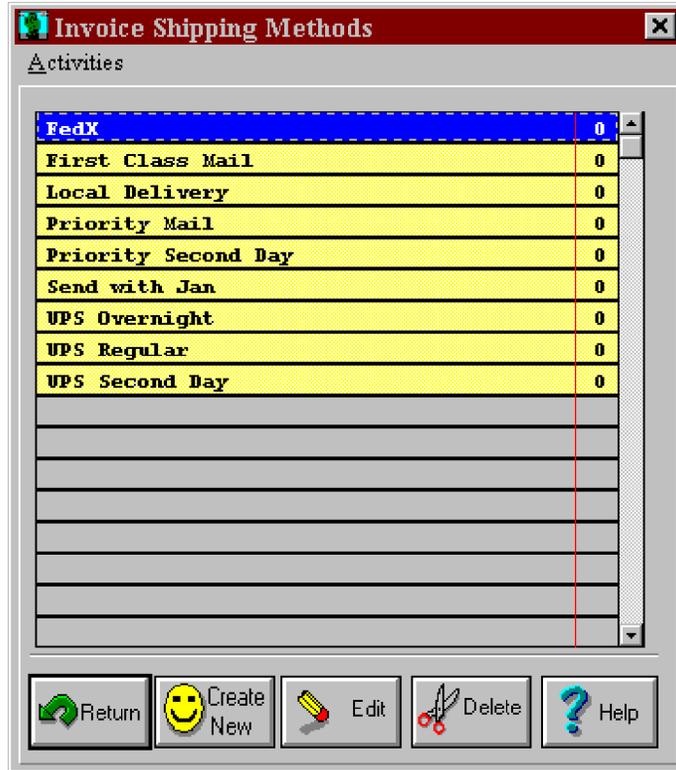
Is taxable allows you to charge tax relating to the sales price of the metal and is reflected on the standard invoice.

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 be 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.**

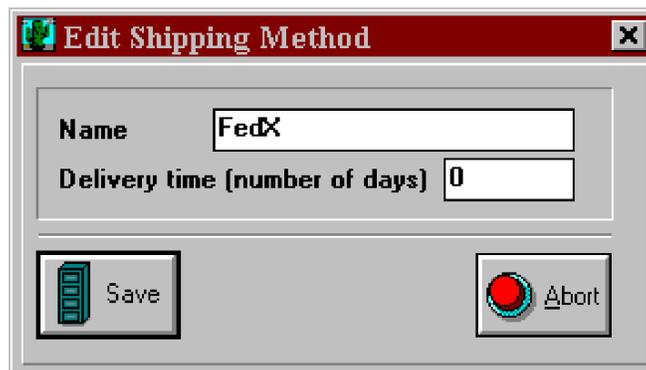
See also: [Doctor configuration](#) for information for setting up exception metal fees for specific doctors.

Shipping Types

When the *Ship* icon  is clicked on the button bar or *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.

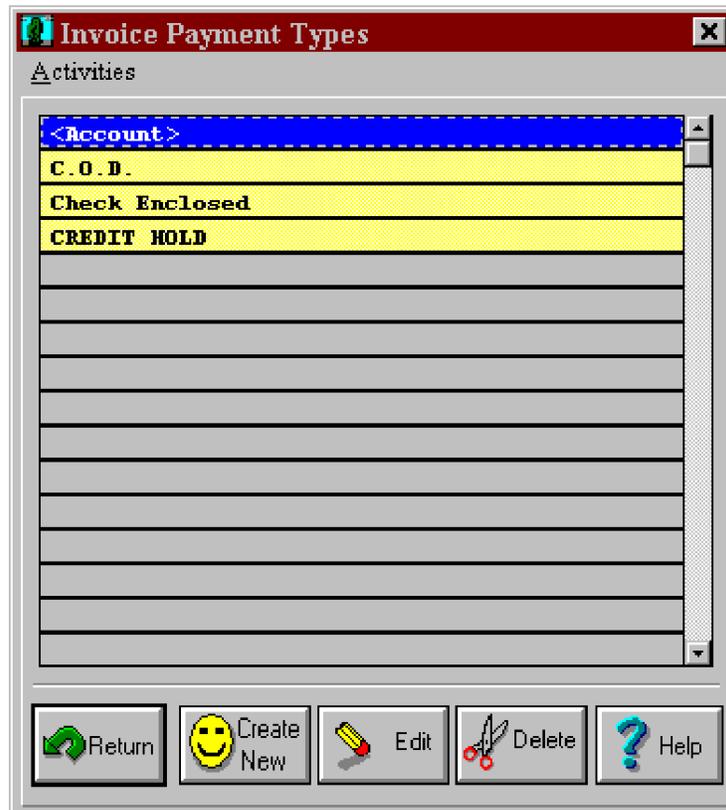


The delivery time is used by the AutoScheduler to determine if the recommended scheduled completion date will allow for proper delivery via the doctor's usual shipping method. **Entering a zero indicates that a case can be delivered the same day as the scheduled completion date.**

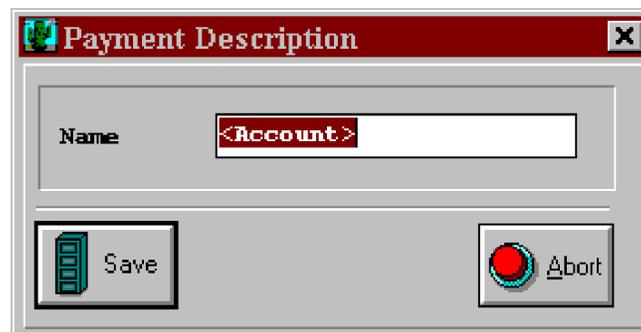
Payment Types

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 the PayList icon  is clicked or *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.

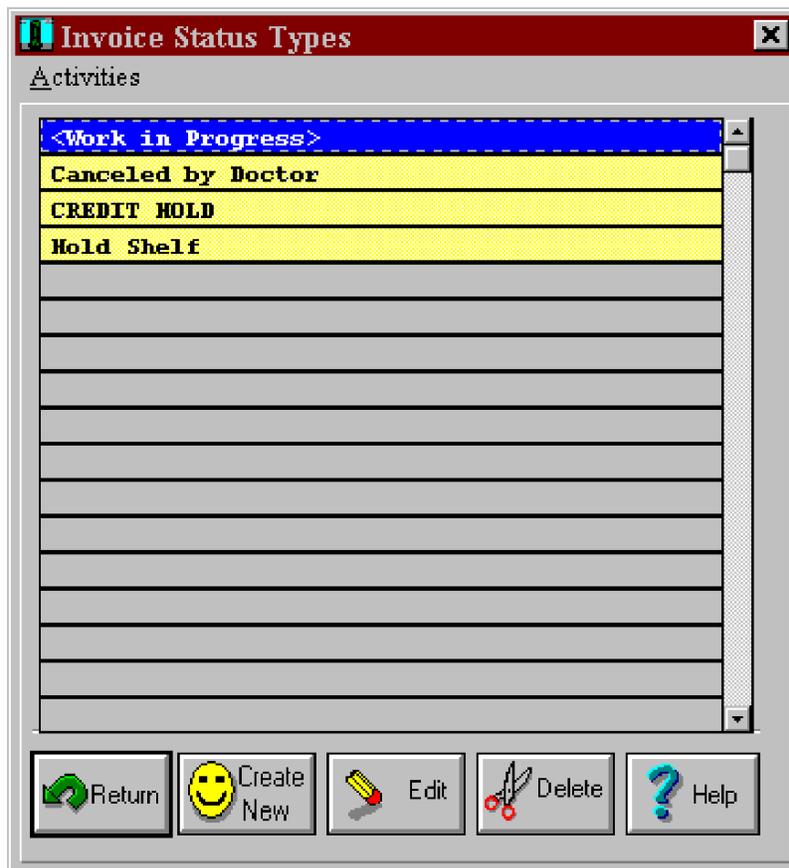


Here you may edit an existing Payment Type, or create a new one.

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 on the Status icon  or selecting *Configure->Status* types from the menu bar, displays the Select Status dialog box.

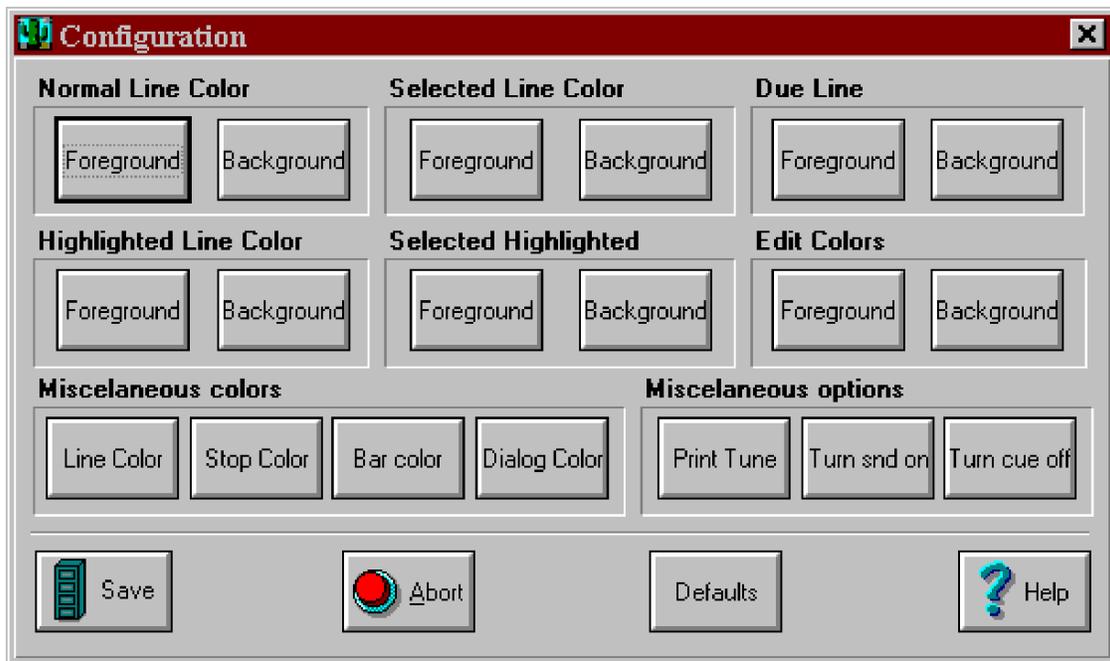


Here you may create a new Status Type, or edit an existing one.

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 contains 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.

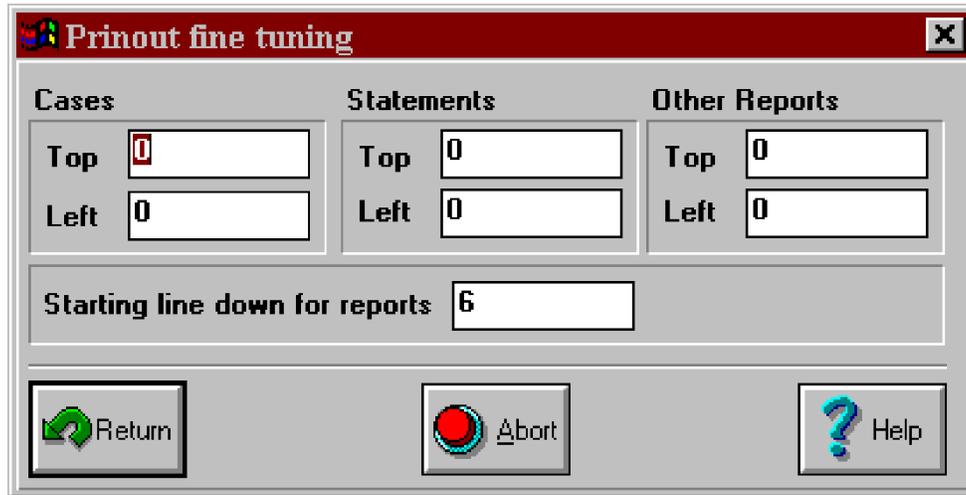
The last box, *Edit Colors* controls the foreground and background of the edit boxes on dialogs. These are the controls you see on your screen where you type in text such as patient name.

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 grey).

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.

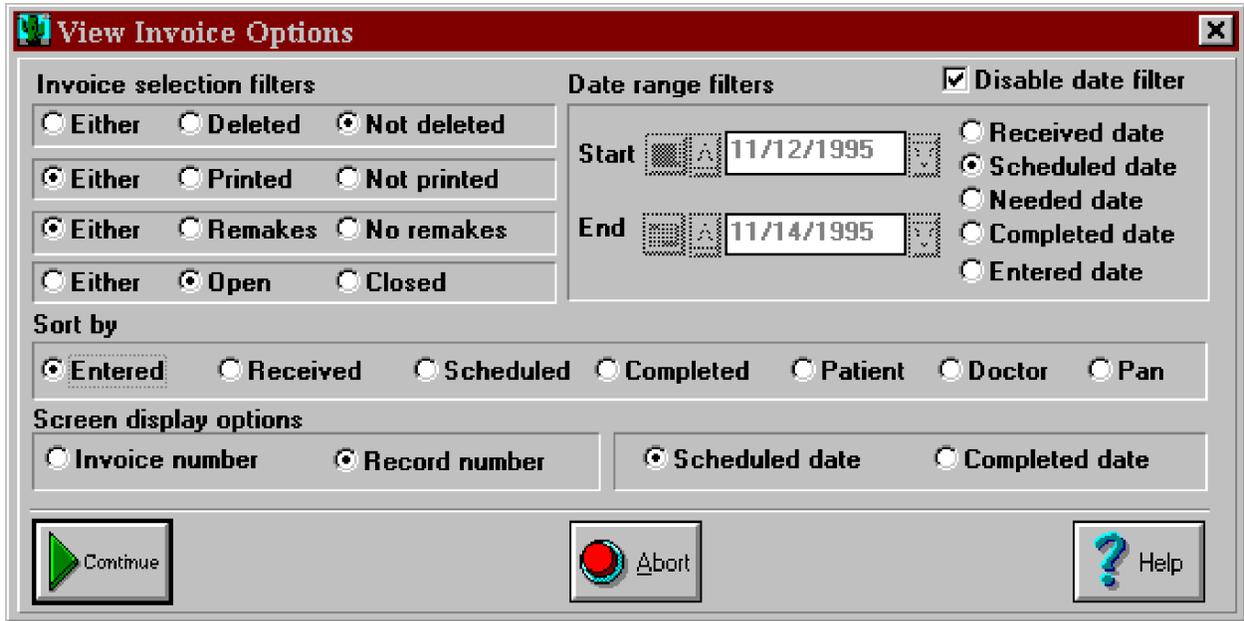
Print Tune

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.*** Start with increments of 100, and notice how much of a change 100 units makes on a sheet of paper. For instance, for a 300 dpi printer, a unit count of 100, would be 1/3rd of an inch. For a 600 dpi printer, 100 would be 1/6th of an inch.

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.



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 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.

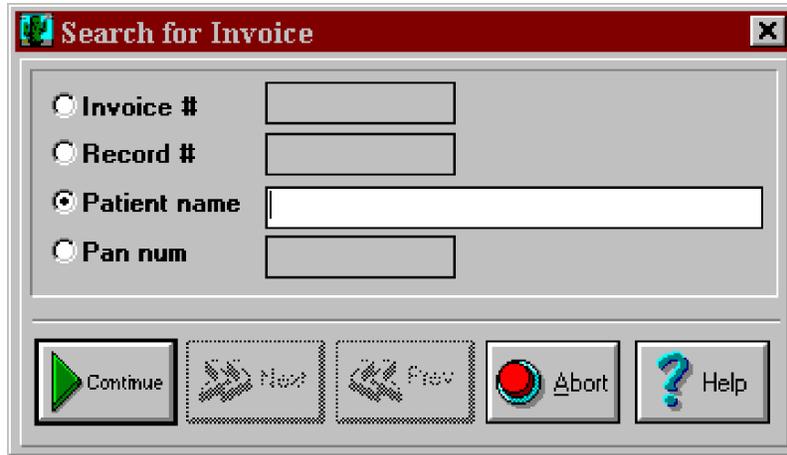
Record number is a sequential number that is incremented each time an invoice is created. *Invoice* number is a unique number assigned to each invoice at the time the invoice is created and will not be duplicated under any circumstance during the course of your business. It is used by the system to process and sort data efficiently. The major difference between the invoice number and record number is that the invoice number is guaranteed not to be duplicated for at least 100 years. 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. 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.

Item	Description	Quantity	Price
PEM NP Complete	00% Rescillium III	10-11	139.00
Fit to Existing Par		10-11	30.00

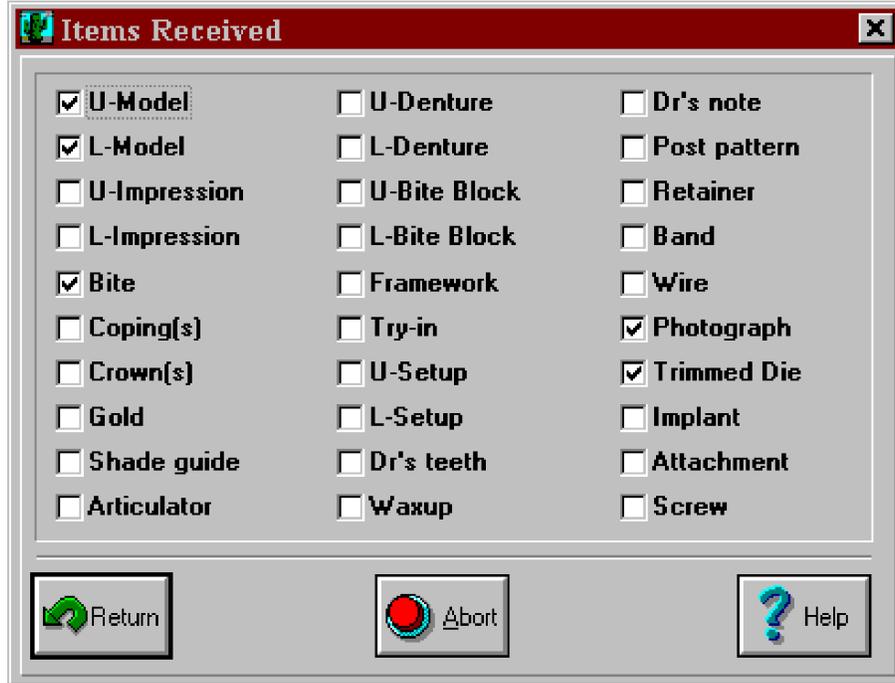
The title bar of this dialog displays the invoice number, record number, and the date the invoice was created.

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.

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*.

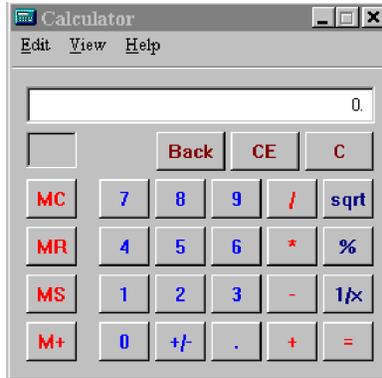
It is possible to enter a completed date when the invoice is created, but it is HIGHLY recommended that you follow the suggested procedure for closing an invoices. See: Closing an invoice for additional information.

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

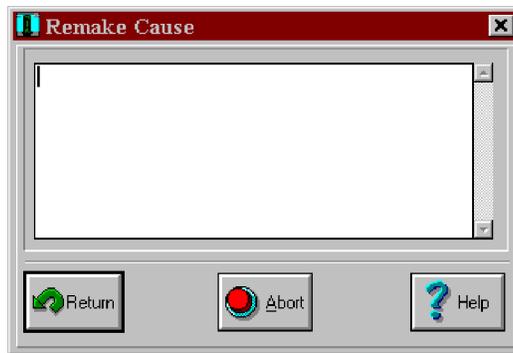


This dialog allows you to select the items that were received as part of a case. This will allow you to keep a permanent record of all items received so you can refer back to it if necessary. Items received is indicated on the standard invoice by **bold** print.

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



If the *Remake* button is checked, a note field dialog will be displayed allowing you to permanently record the reason for the remake.



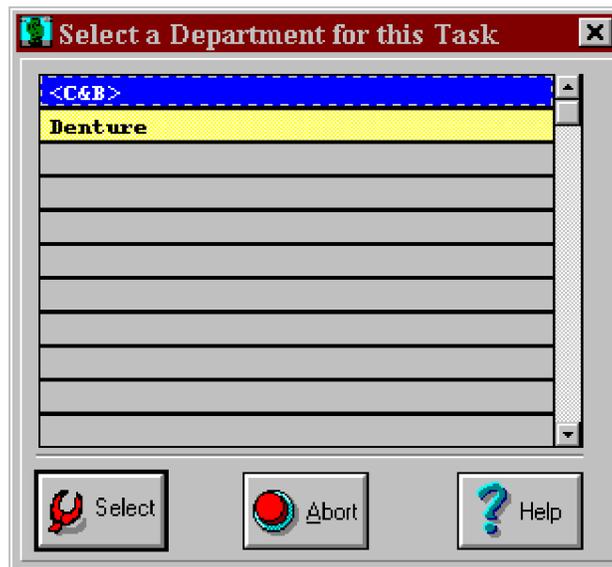
When invoices are sent to the printer, **WinVoice™** checks each invoice to see if a *Notice* button is checked on any of the recently entered invoices. If one or more are, **WinVoice™** prompts if you would like to print Notice letters.

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.

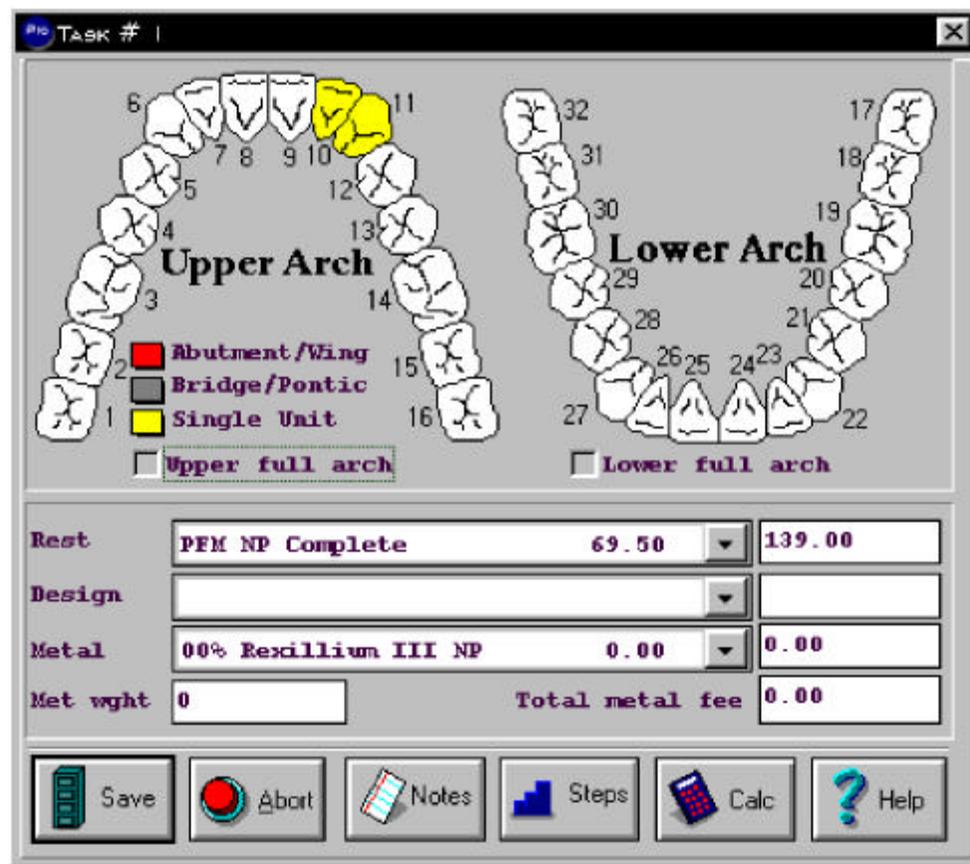
Tasks

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. The standard invoice that is included with **WinVoice™** has room to print five tasks. **If your particular mode of operation requires that you print more than 5 tasks, you may commission WinVoice Support to create a custom print format to accommodate your needs.** (There is a modest fee for this service). Each task must include at least one restoration and can optionally include, a design, a metal, metal weight, notes, and steps.

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.



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 a 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 it's 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.

0	Opaque	Jane Doe
0	Die trim	Jane Doe
0	Metal finish	Jane Doe
0	Finish/Polish	Jane Doe
0	Porcelain glazing	Jane Doe
0	Porcelain build-up	Jane Doe
0	Porcelain grinding	Jane Doe
0	Die prep and wax-up	Jane Doe

Employee: Jane Doe

Completed date

Started: [Calendar] [] at []

Finished: [Calendar] [] at []

Save Help

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.**

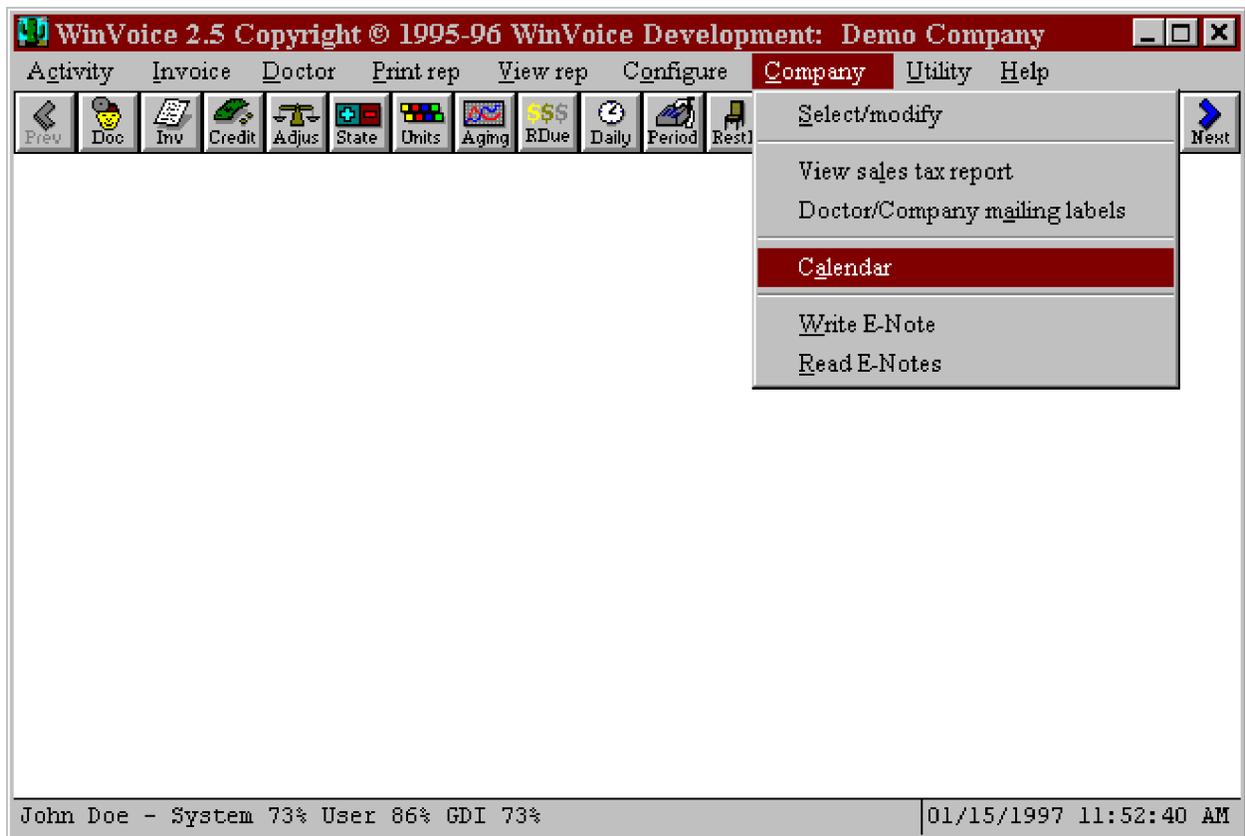
Click on the step at the left, then click on the employee that completed the step at the right. See: Step configuration for detail concerning default step assignments.

Scheduling

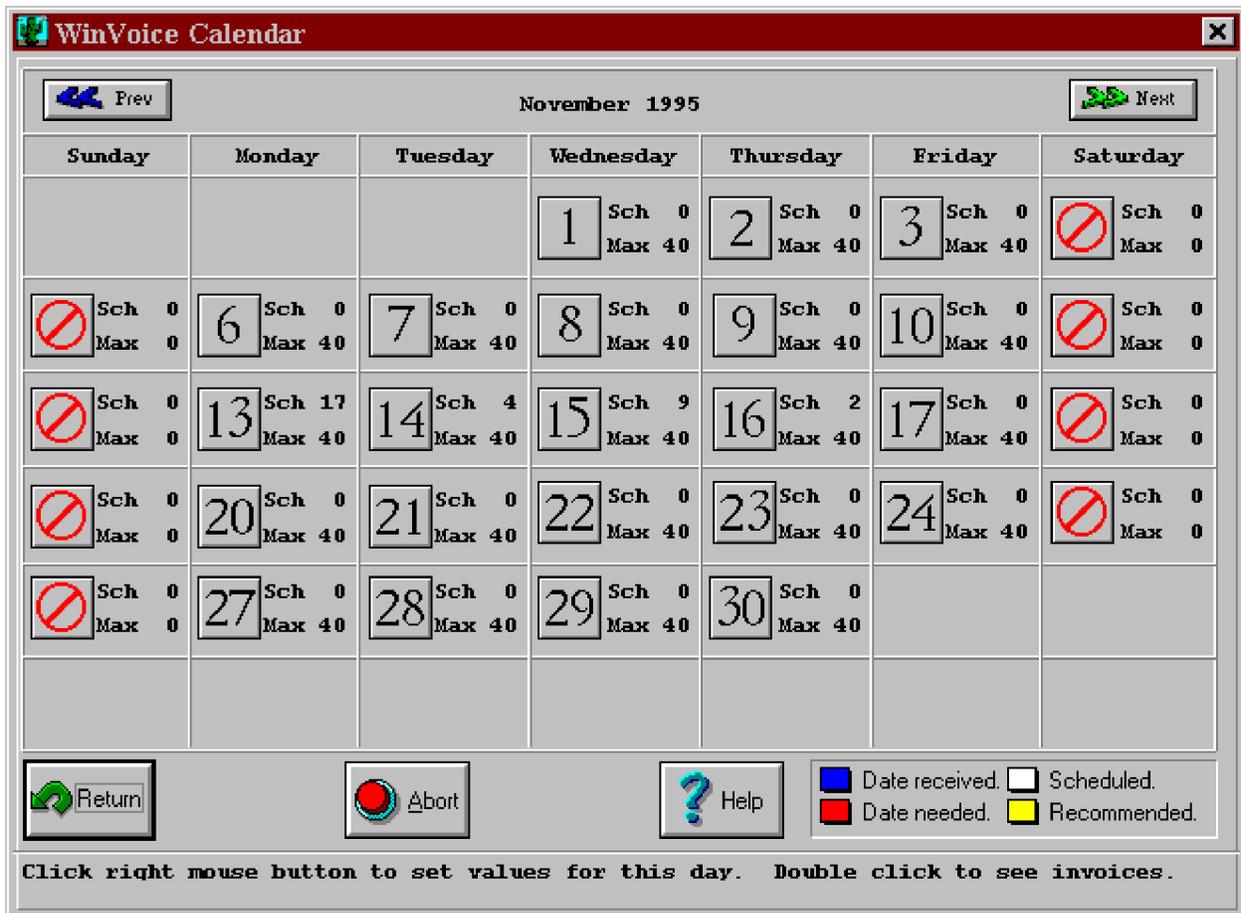
Manually scheduling a busy lab is a time consuming, sometimes confusing, and usually an inaccurate process. It requires that the person responsible be very knowledgeable as to everything that is going on in the lab, approximately how long it takes to process different restorations, when the doctor needs 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 case load 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.



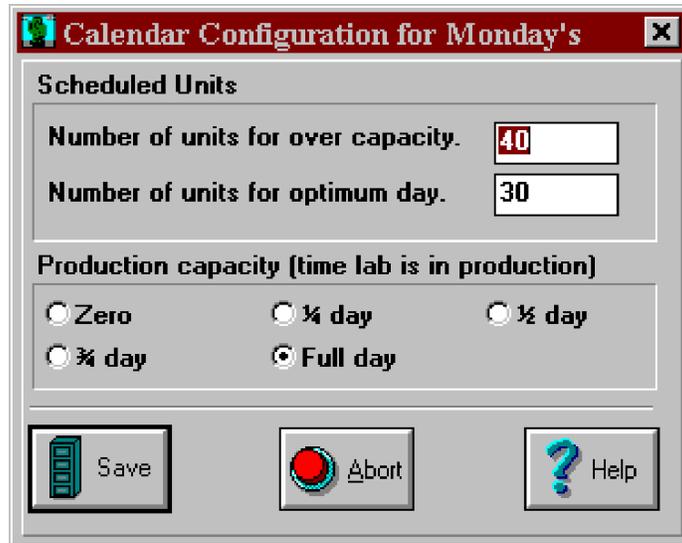
Selecting this menu item displays the **WinVoice™** Company calendar dialog box.



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 , 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.



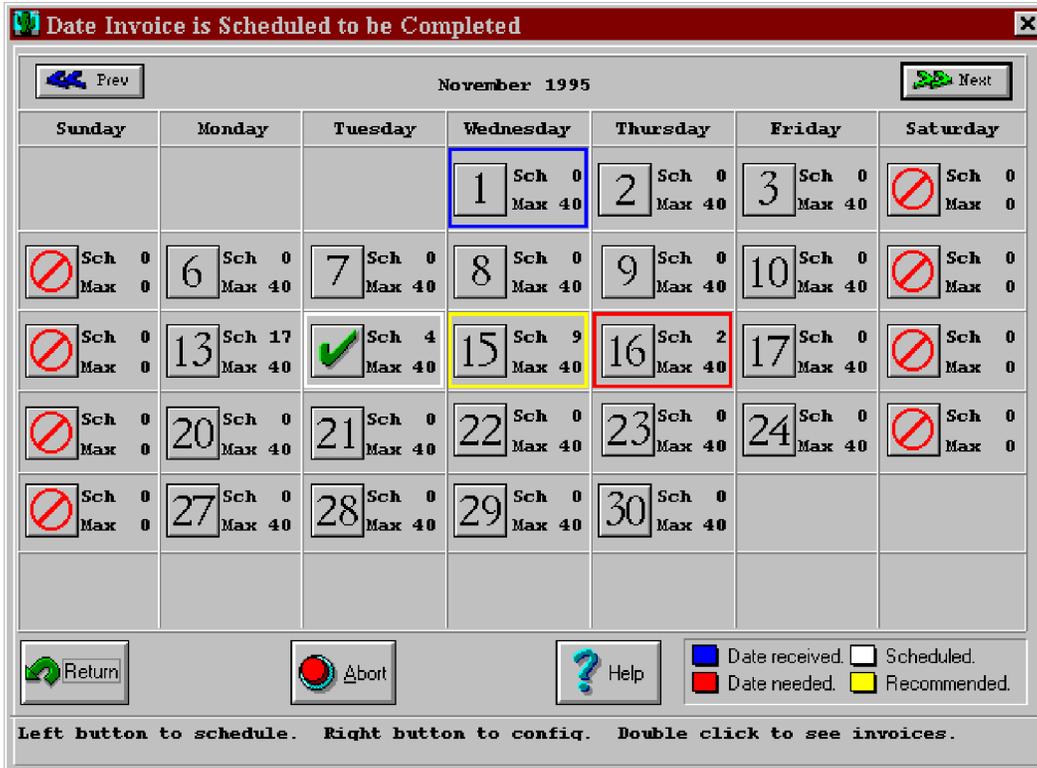
This dialog allows you to configure each day of the month. If the optimum number of units for your lab to produce per day is 30, enter 30 under the "Number of units to be considered day optimum" field. If the very maximum number of units your lab can produce is 40, enter that value under "Number of units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

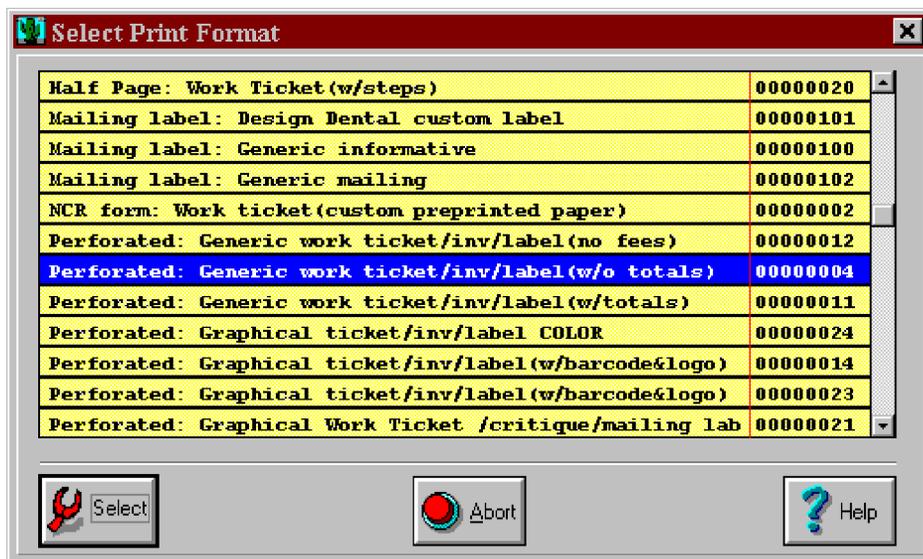
WinVoice™ allows you to print invoices, work tickets and statements using proprietary print formats. These print formats allows configuration fields to be positioned at will on a page, along with logos, bitmaps, text, lines, and assorted fonts and color preferences. This is one of the most powerful features of **WinVoice™** as it allows for inexpensive customization of your printouts.

Depending on your programming skills, designing print formats can be a time consuming and sometimes confusing process. 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.](#)

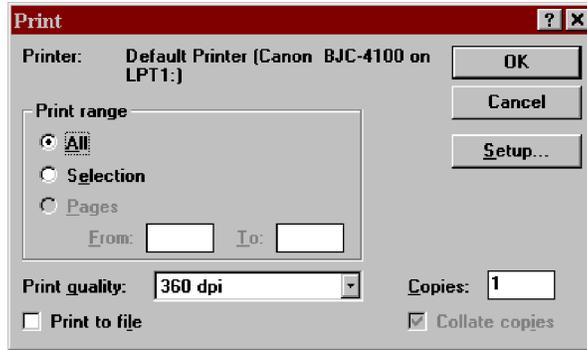
You may also select to print all *Unprinted invoices* in your invoice list by clicking *Activities* on the Invoice dialog and then selecting *Print all Unprinted invoices.*

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.

After highlighting the print format and clicking the *Select* button, the Windows 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™**.

Within the Select printer dialog, you may also select the windows 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 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 a invoice(s) is printed, **WinVoice™** 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*.

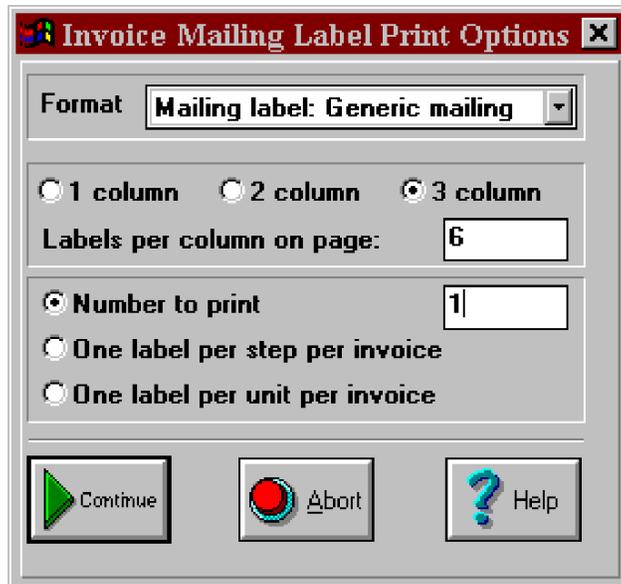
See: Data Entry, Notice Button for additional information.



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™** 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 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 as to the size of paper you intend to use. Refer to your Windows users manual for information on how to set up paper size.

Please note that each printer is made differently and not all print drivers are designed the same. Not all of **WinVoice™**'s capabilities may be available with your printer. For instance, if your printer does not highlight the tooth charts, try switching to one of the compatible print drivers that came with Windows rather than the print driver provided along with your printer. **WinVoice™** conforms to the microsoft print driver specifications, so the drivers that come with Windows should work properly. The most notable example are the HP print drivers. Most of the newer models that have come out in the last several years don't have properly working drivers, but the internal Windows drivers work perfectly. We are working to get these drivers corrected.

Closing

Closing an invoice tells the system that the case has been processed by the lab 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/workticket. 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.

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

Close Invoice

Closing date 01/13/1997

Invoice# : 816447353 Rec# : 5 Remake

Patient name : Dennie, Moore

Doctor name : Smith, Dr. John

Total fee : 127.67 Units : 2

Continue Abort Edit Steps Print Help

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.

After a days (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.

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 lab's 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 lab's 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.

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. A doctor's billing account **WILL** be altered by deleting one of his/her closed invoices.

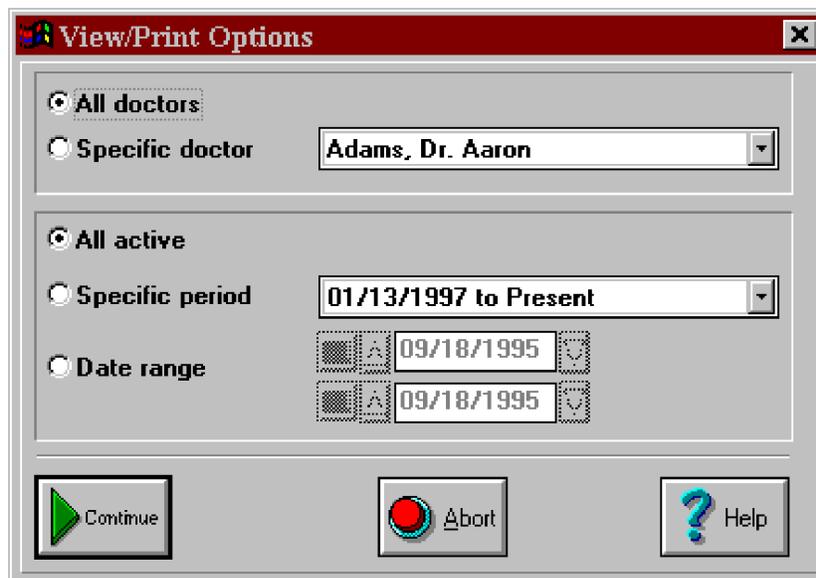
Payments

Payments consist of Credits and Adjustments. Credits are 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 the *Credit* icon  from the button bar, or *Activity->Credit doctor account* from the menu bar, the Credit View Options dialog is displayed.

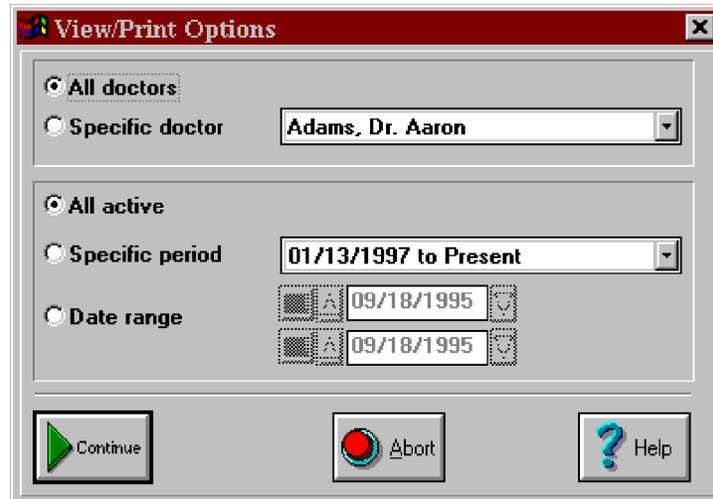


This dialog allows you to filter how credits are viewed and printed. You may view *All doctor's* credits or a *Specific* doctor's credits. You can view *All active* credits, or just the credits issued during a *Specific period*. You may also select a *Date range*.

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

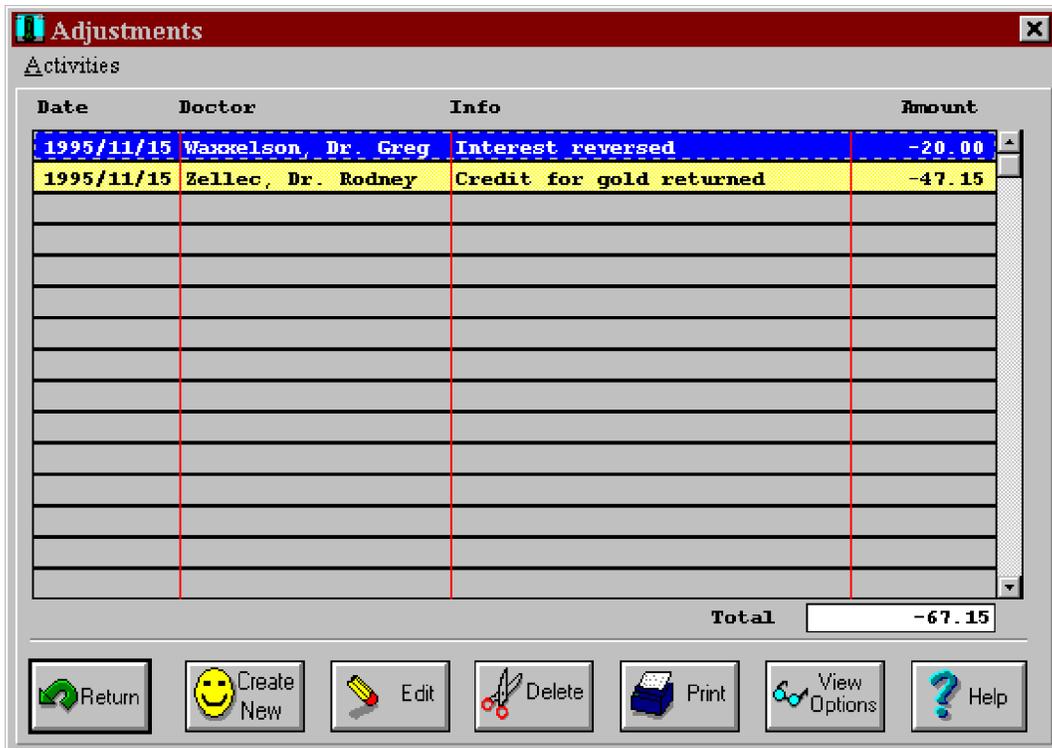
Adjustments

When you click the *Adjus* icon on the button bar or select *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.

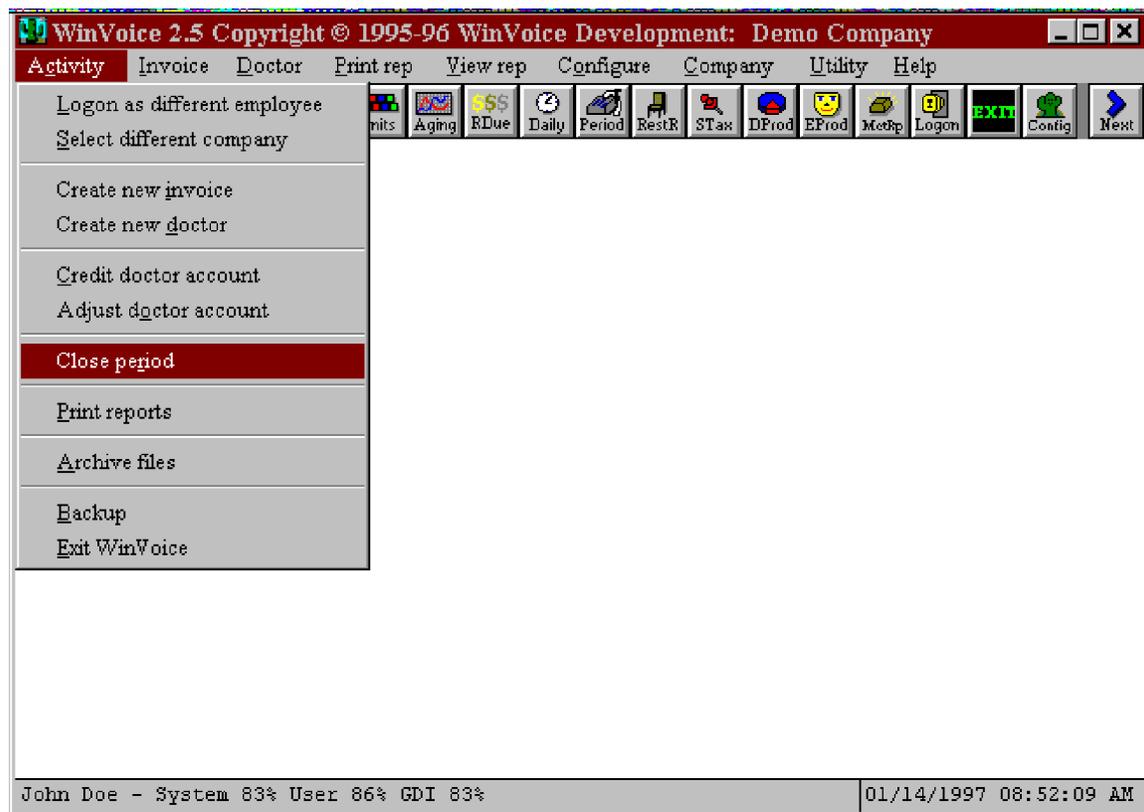
Billing Periods and Archiving

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.

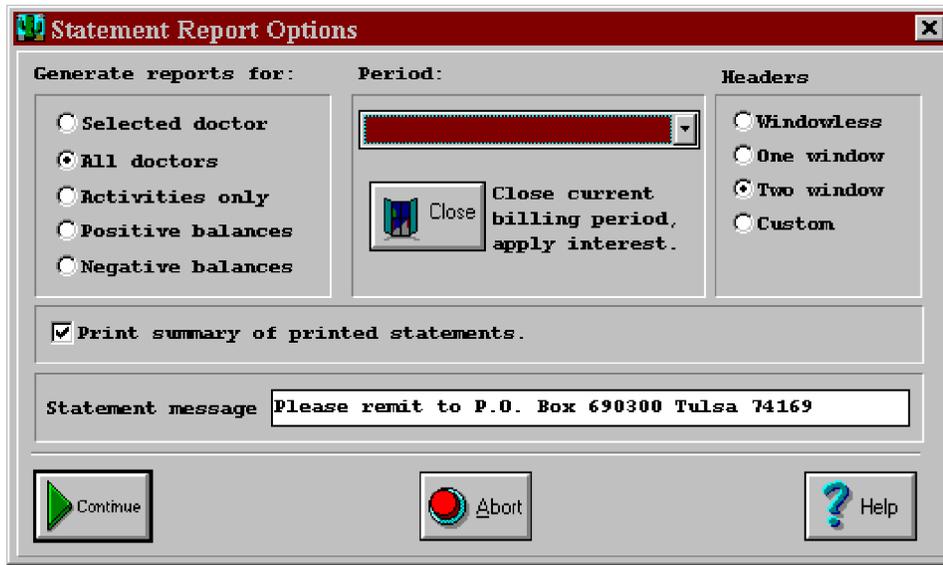
Closing a Period

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.

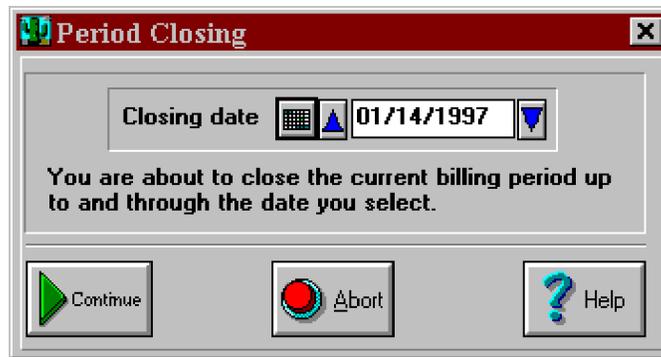
You may close a period in one of two ways. You may either select Close Period from the Activities menu, depicted below.



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 note: Be absolutely sure of your intentions before closing a period. You should preform 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.

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.

Please insure that a reliable BACKUP is performed prior to archiving and that you are absolutely sure you wish to proceed.

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**[™] is having to search through a multitude of invoices and it's 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.

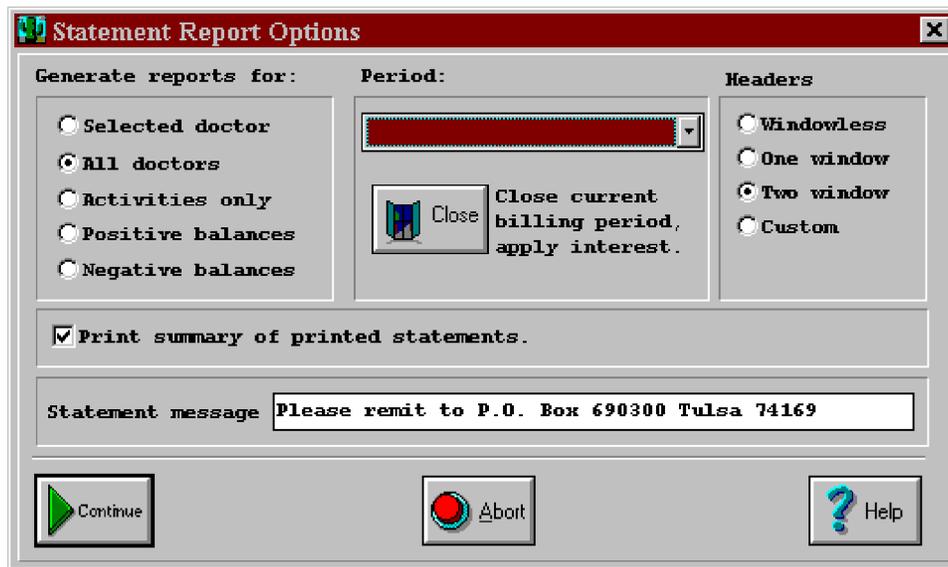
Note: It is a good policy to return to Current files after you are finished retrieving archived information. Technical support reports that a common user error is made by individuals loading an archive, (to retrieve desired information) then leaving the system in an archive state. This allows a co-worker to get on the system and not understand why the invoices on the screen don't match the current work load. A per-instance support charge can be avoided by always returning the system to the Current files state.

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, 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.**

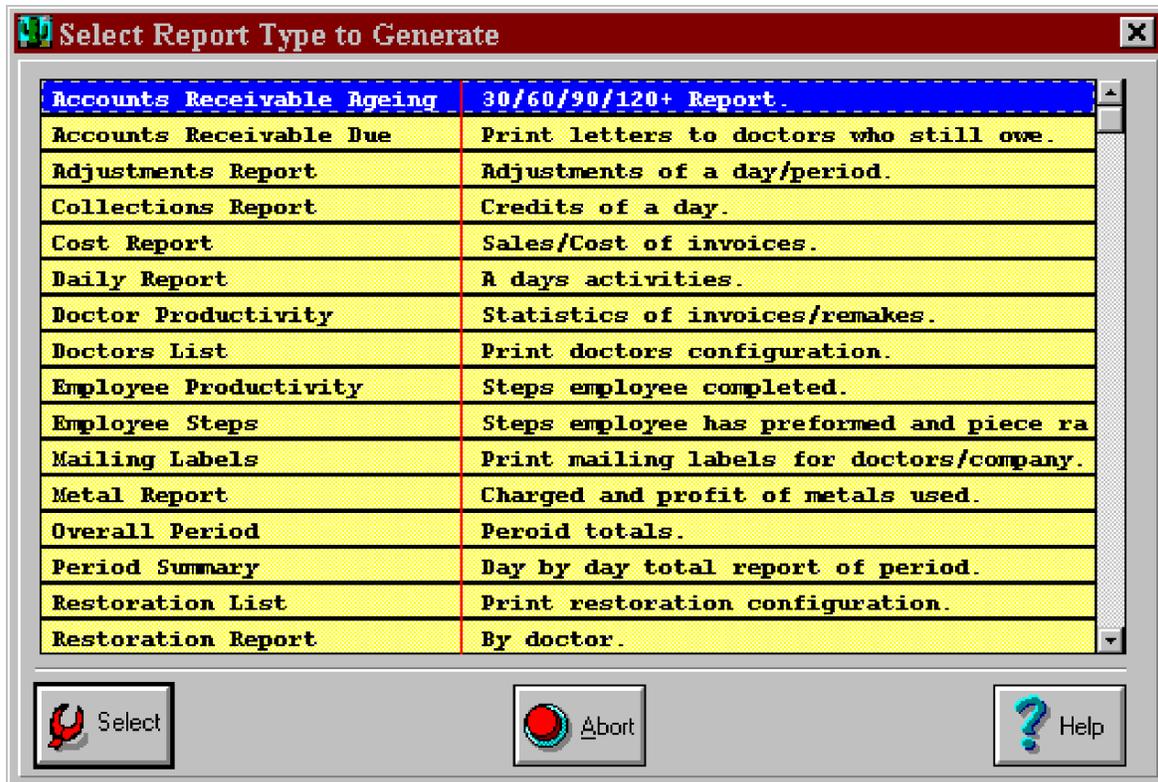
The *Statement message* is text that is printed at the bottom of each statement. It may be something such as "Happy holidays" or specific instructions as to where to send payment.

If the *Show summary* box has been checked, a summary page will print following the statements showing grand totals for the batch of statements. Printed on the summary is, Grand balance, Sales, Interest, Collections, Number of payments, Number of invoices, Number of remakes, the Total number of units as well as other statistics about the printed statements.

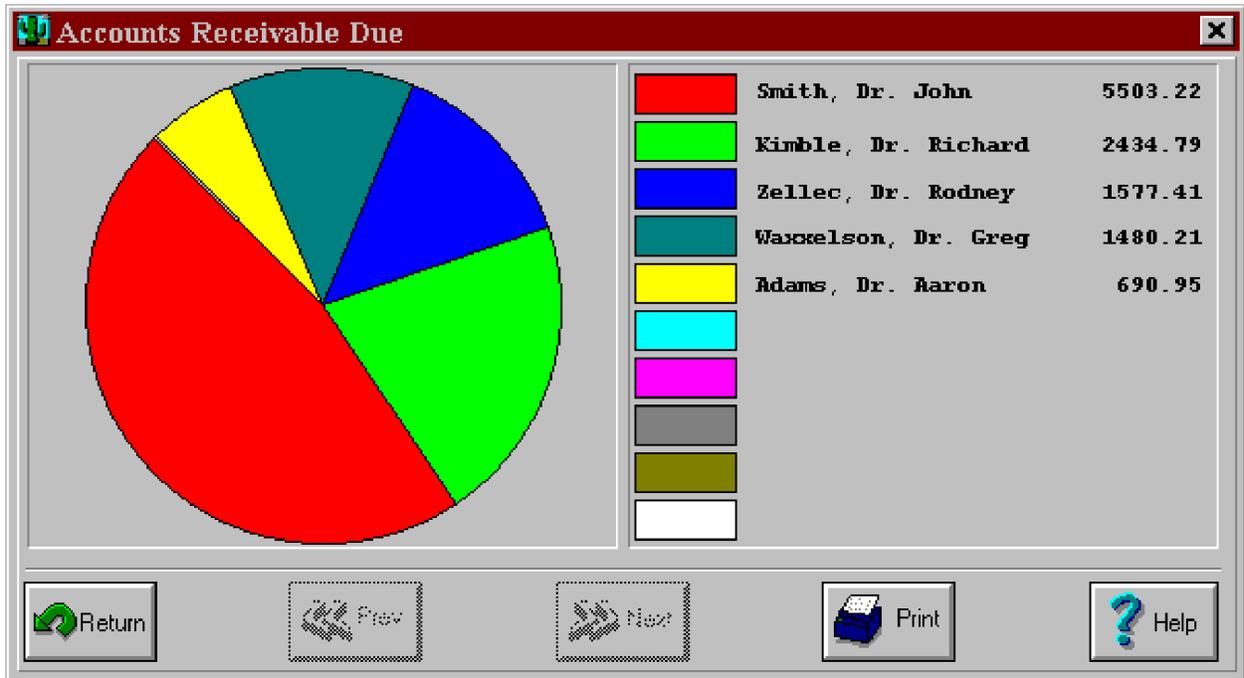
Reports

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.

For easy access to printed reports, the button bar contains the *Report* icon . It gives you quick access to all available reports, along with a brief description of the report.



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.



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.

Accounts Receivable Ageing

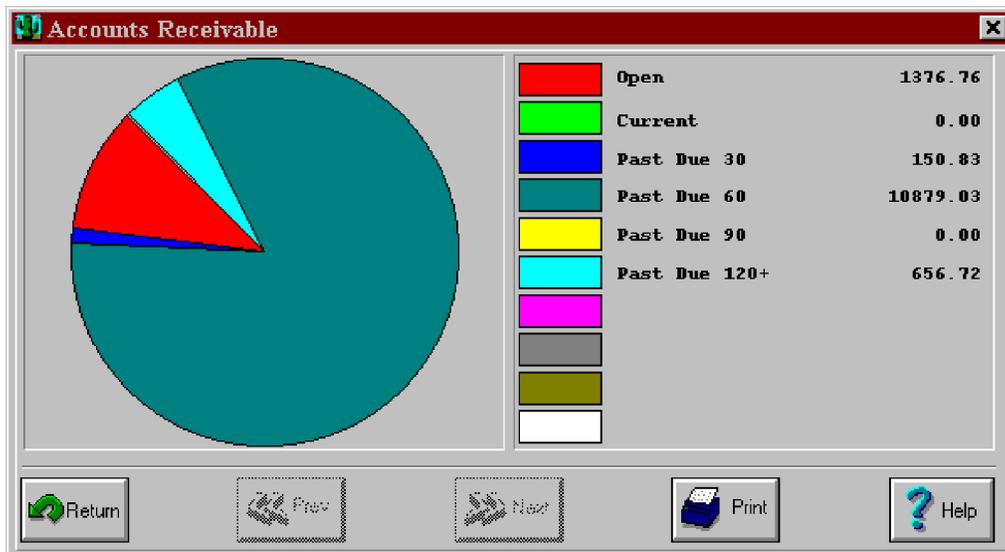
The Accounts Receivable Ageing report shows amounts for invoices that are 30/60/90/120+ past due. It also shows the current balance owed by doctors, and the total of their open invoices.

After clicking the *Agmg* icon  from the button bar, or selecting *Print rep->Billing->Accounts receivable ageing* from the menu bar, the Accounts Receivable Ageing dialog box appears.

Doctor	120+	90	60	30	Current	Open
Adams, Dr. Aaron	102.50		578.24	10.21	0.00	0.00
Kimble, Dr. Richard	255.00		2143.81	35.98	0.00	0.00
Smith, Dr. John			5421.89	81.33	0.00	220.34
Waxkelson, Dr. Greg			1480.21		0.00	670.50
Zellec, Dr. Rodney	299.22		1254.88	23.31	0.00	485.92
Grand totals:	656.72		10879.03	150.83	0.00	1376.76

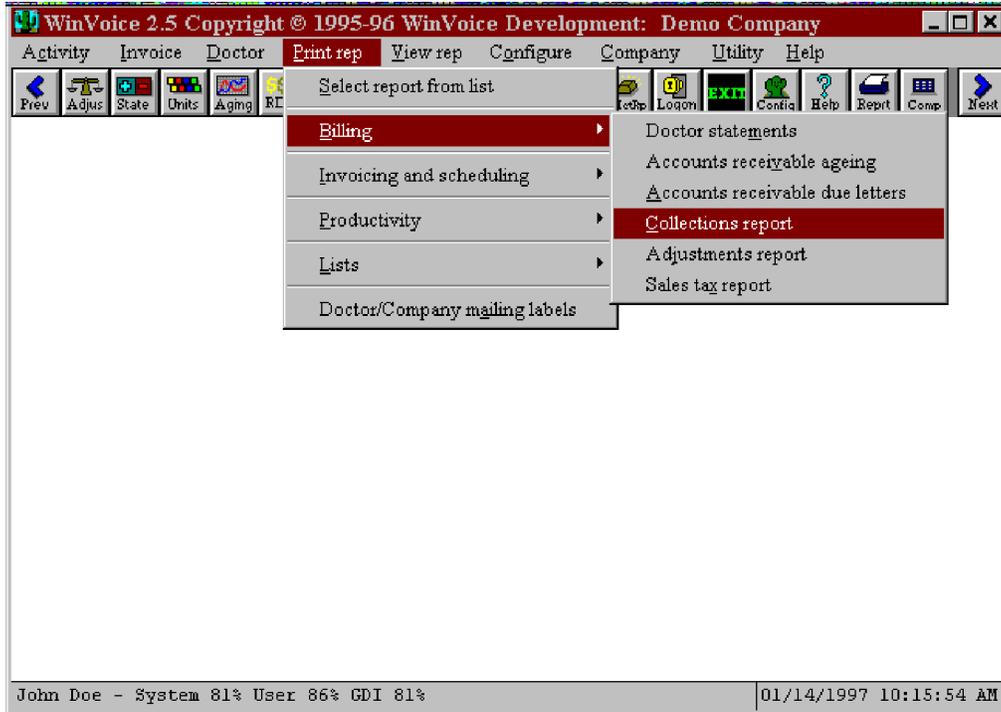
Buttons: Return, Print, Show Graph, Help

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

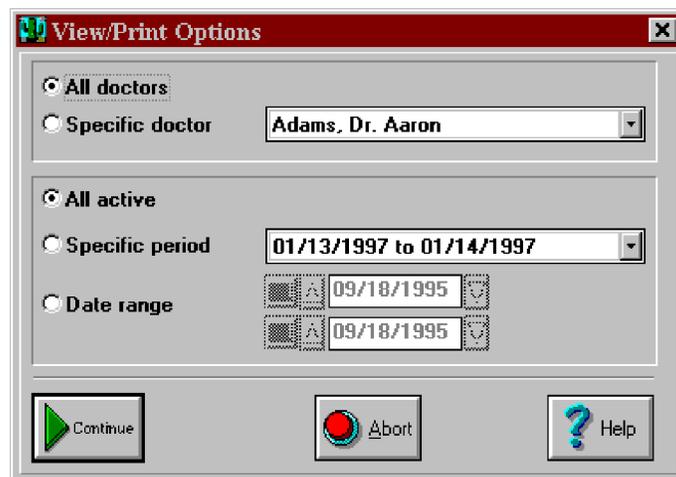


Collections Report

The collections report is a list of credits (payments). It may be selected from the *select reports* dialog, the *select credit* 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.

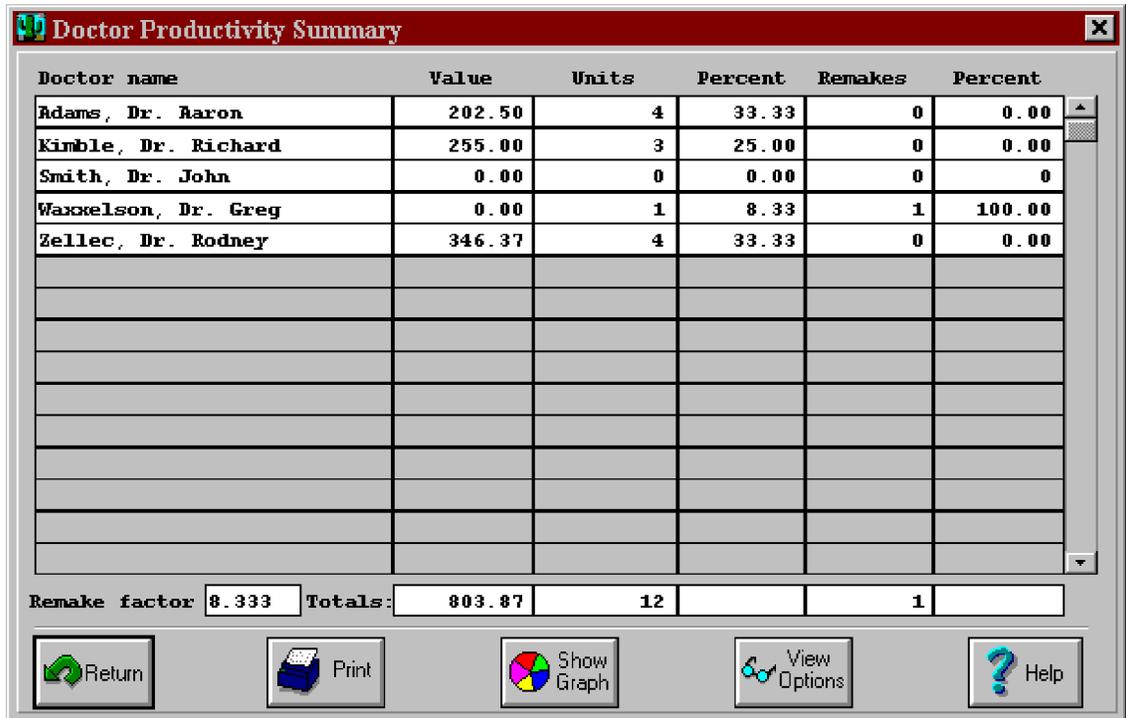
Doctor Productivity

The Doctor Productivity Report will generate information showing the total sales to 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 the *DProd* icon  on the button bar or *View Rep->Productivity->Doctor productivity report*, the Doctor Productivity Report Options dialog box displays.



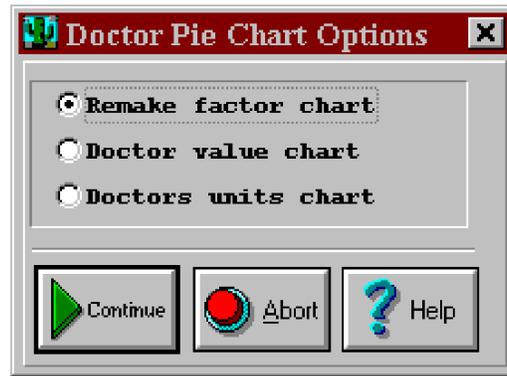
You may select a *Date range* or the period to use as search criteria. When you click the *Continue* button, the Doctor Productivity dialog box appears.



Doctor name	Value	Units	Percent	Remakes	Percent
Adams, Dr. Aaron	202.50	4	33.33	0	0.00
Kimble, Dr. Richard	255.00	3	25.00	0	0.00
Smith, Dr. John	0.00	0	0.00	0	0
Waxcelson, Dr. Greg	0.00	1	8.33	1	100.00
Zellec, Dr. Rodney	346.37	4	33.33	0	0.00
Totals:					
Remake factor	8.333	803.87	12	1	

You may change the Date Range at any time by clicking the View Options button.

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

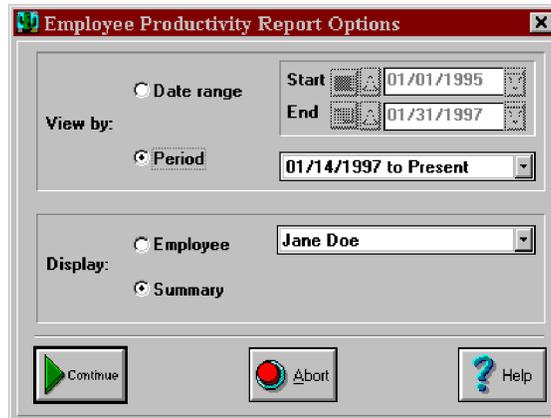


You may select to see a pie chart based on the *Remake factor* of each doctor, the production *Value* of each doctor, or the *Units* sent for each doctor.

Employee Productivity

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

Clicking the *EProd* icon  from the button bar or selecting *View Rep->Productivity->Employee productivity* from the menu bar brings up the Employee Productivity options dialog.



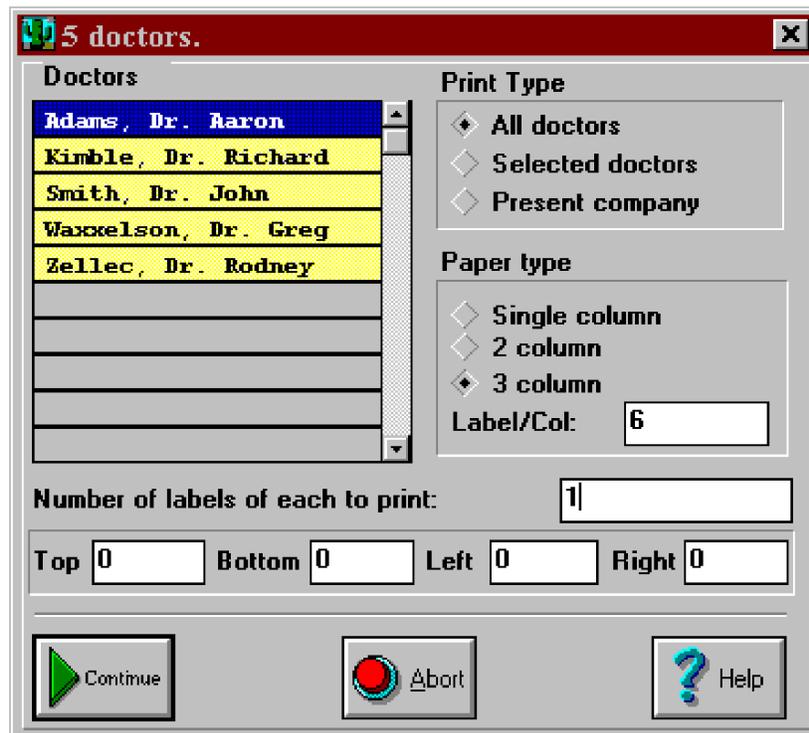
You may select to view steps completed, by a *Date range* or a *Specific period*. You may also select to see a particular employee's steps record, or a summary of how many of each steps where preformed.

Step name	Restoration	Number	Piece rate	Rate
Die trim	PFM NP Complete	1	1.00	1.00
Die prep and wax-up	PFM NP Complete	1	4.00	4.00
Metal finishing	PFM NP Complete	1	4.00	4.00
Opaque	PFM NP Complete	1	0.50	0.50
Porcelain build-up	PFM NP Complete	1	5.00	5.00
Porcelain grinding	PFM NP Complete	1	5.00	5.00
Porcelain glazing	PFM NP Complete	1	1.00	1.00
Polish	PFM NP Complete	1	1.00	1.00
Wax to partial	Fit to Existing Part	1	2.00	2.00
Build porc to Partia	Fit to Existing Part	1	2.00	2.00
Grind porc to partia	Fit to Existing Part	1	3.00	3.00
Grand totals:		11	28.50	28.50

Note: Number is number of restoration steps preformed, NOT restoration units.

Mailing Labels

Mailing labels may be printed for the company or for doctors. The mailing labels 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.** 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. **The *Mailing labels* report differ from the *Custom Labels* report, as the printing format can not be customized.**

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.



Clicking the *MetRp* icon on the button bar, or selecting *View Rep->Productivity->Metal report* on the menu bar will display the visual metal report.

Metal Report						
Period		01/13/1997 to 01/14/1997				
Metal name	Cases	Weight	Charged	Our cost	Profit	
50% C&B Medium AU Color	0	0.00	0.00	0.00	0.00	
00% Rexillium III NP	0	0.00	0.00	0.00	0.00	
02% C&B White Color	0	0.00	0.00	0.00	0.00	
01% PEM PF+ White Color	0	0.00	0.00	0.00	0.00	
52% PEM SF White Color	0	0.00	0.00	0.00	0.00	
74% PEM Lite AU Color	0	0.00	0.00	0.00	0.00	
88% PEM Good AU Color	0	0.00	0.00	0.00	0.00	
20% C&B Lite AU Color	0	0.00	0.00	0.00	0.00	
75% Inlay Good AU Color	0	0.00	0.00	0.00	0.00	
Grand totals:						
	0	0.00	0.00	0.00	0.00	

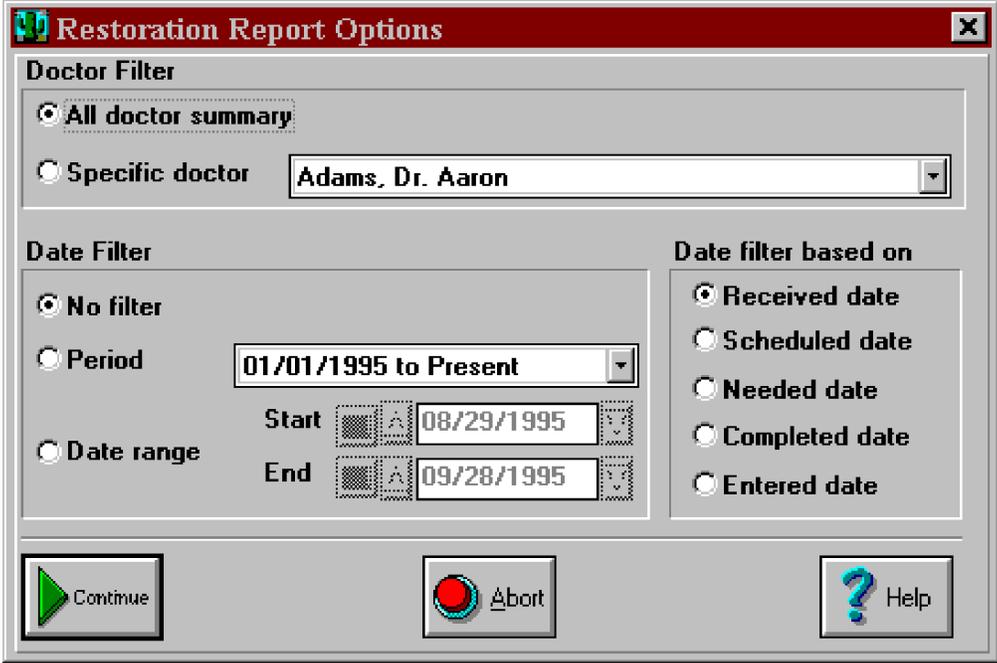
Return
 Print
 Show Graph
 Help

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

Restoration Report

The restoration report gives a listing of restorations completed. There are various filters for this report allowing for many variations.

By clicking the *RestR* icon  from the button bar or selecting *View Rep->Productivity->Restoration report* from the menu bar, the Restoration Report Options dialog displays.



Restoration Report Options

Doctor Filter

All doctor summary

Specific doctor

Date Filter

No filter

Period

Date range

Start

End

Date filter based on

Received date

Scheduled date

Needed date

Completed date

Entered date

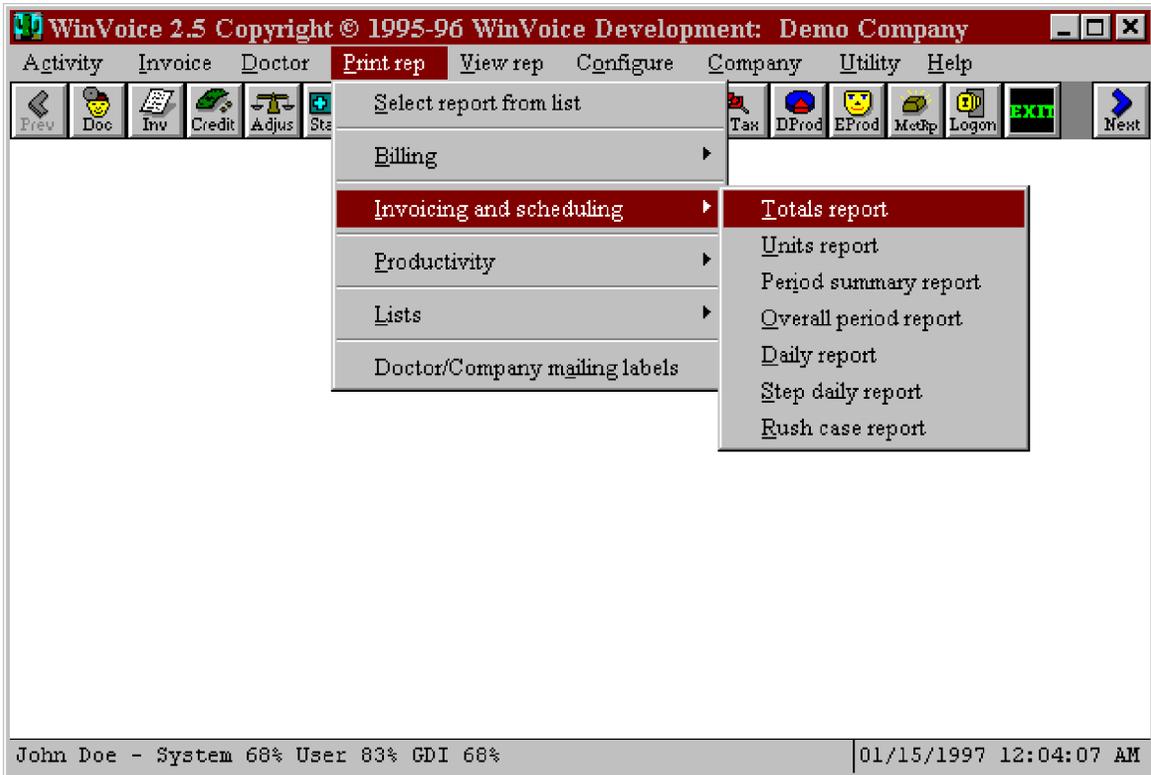
You may select a *Specific doctor* to view, or an *All doctor summary*. You may also select to scan all invoices (*No filter*) or just the invoices in a specific period (*Period*), or by a *Date range*. The *Filter based on* group, controls which date field **WinVoice**[™] will use as selection criteria, (assuming *Date Range* is selected as the date filter).

After clicking the *Continue* button, the restoration report dialog box appears.

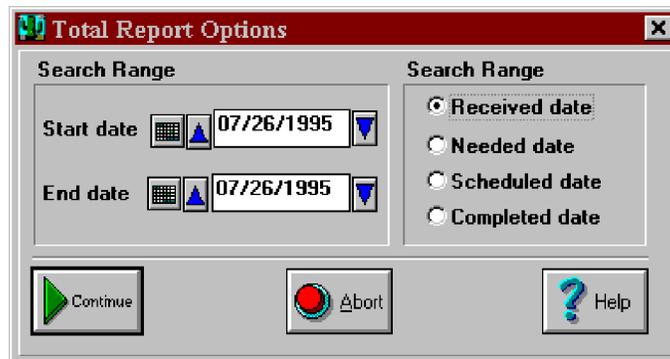
Totals Report

The totals report is a printed report that shows a day by day list of invoices. This list includes the invoice number, pan number, patient name, doctor name, if the invoice is open, and the fee for the invoice. The totals report does not have an on screen equivalent.

Select this report either by clicking the *Report* icon on the second page of the button bar or through the print report menu item.



When you select the totals report, you are then given the Total Report dialog box.

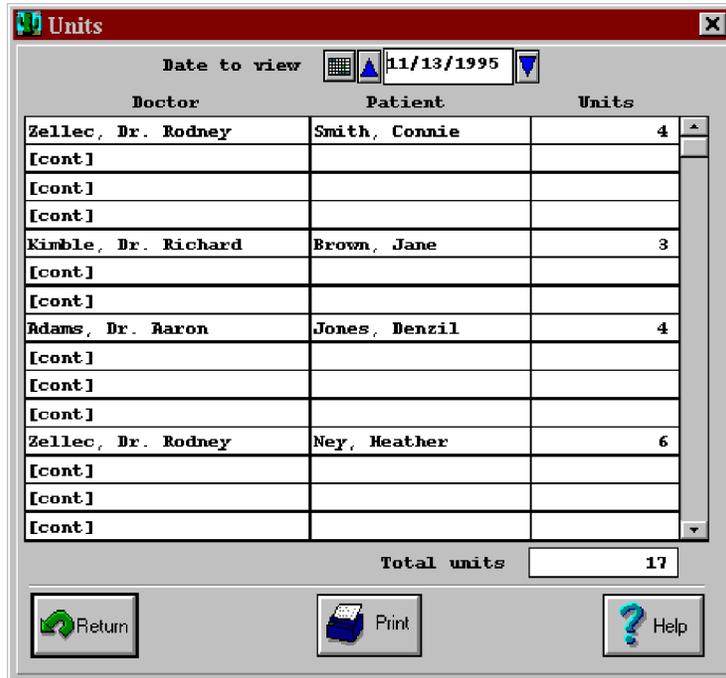


Filter the invoices to print by *Received*, *Needed*, *Scheduled*, or a *Completed* date range.

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 the Units icon  from the button bar or selecting *View Rep->Invoicing and Scheduling->Units Report* from the menu bar, displays 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™** brings up the Units Report options dialog box.

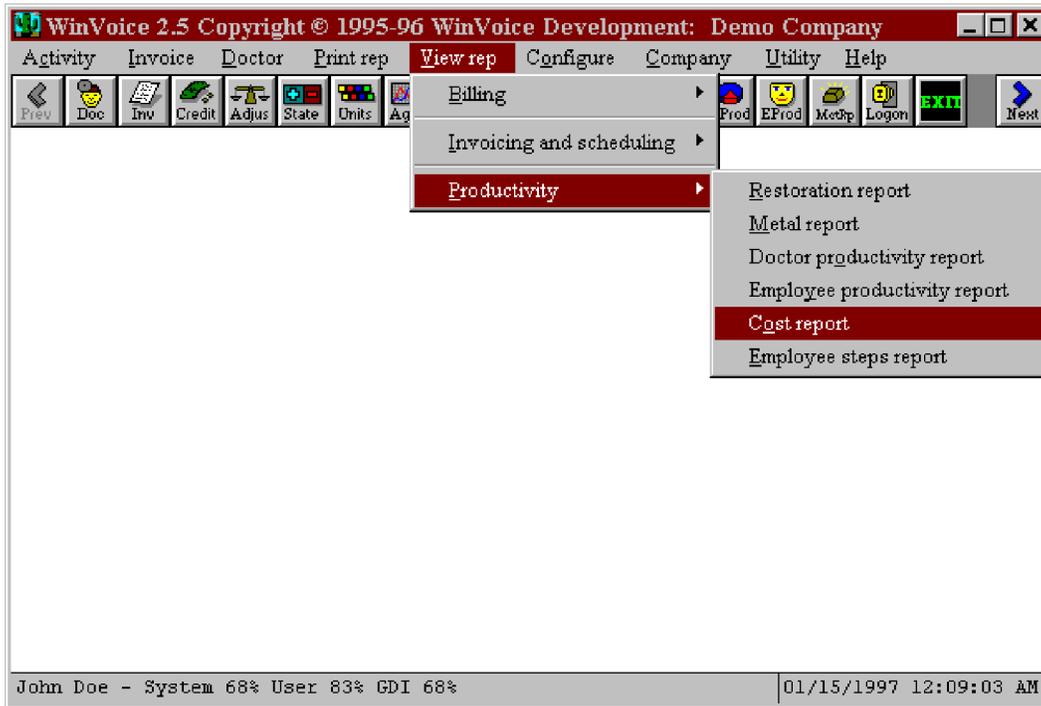


The units report printout is divided into a three column chart per page. Each column shows a list of up to 80 units per day. You can use this chart to quickly see which days are going to be busier than others and if you

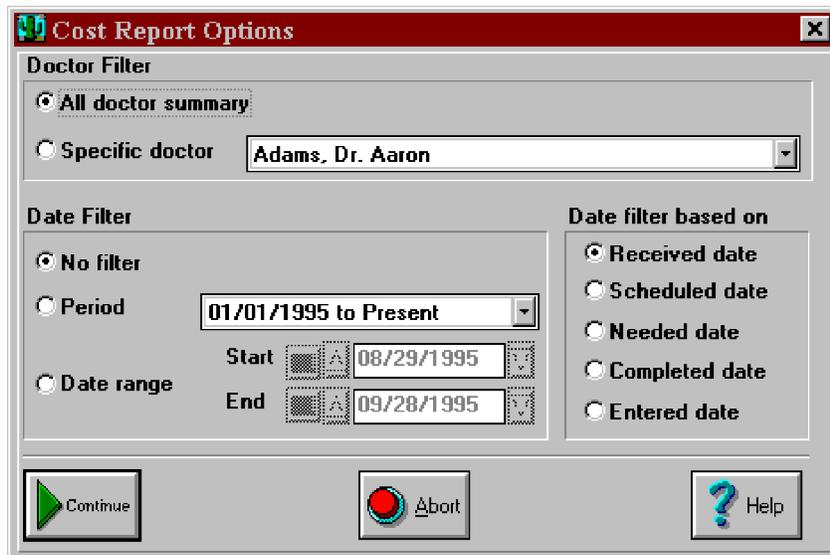
have exceeded your daily production capacity.

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 the menu.

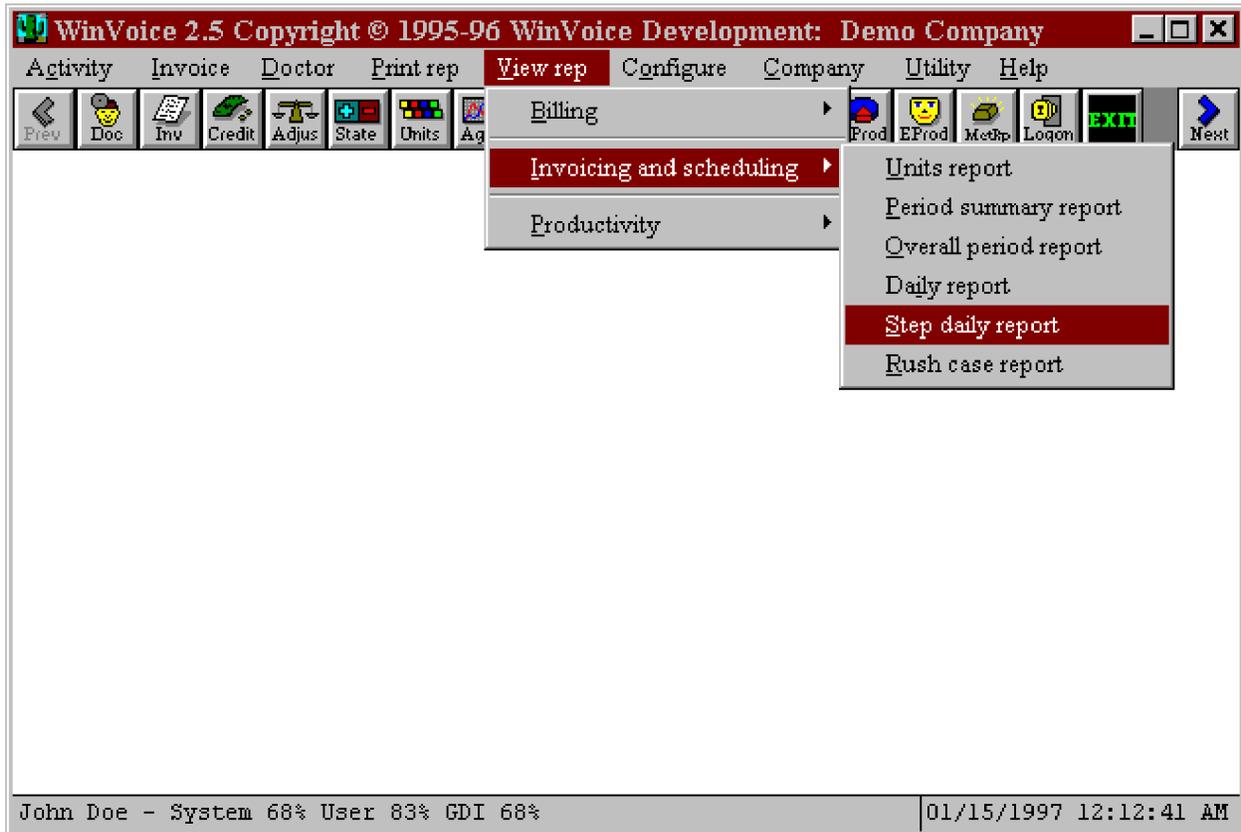


Executing the cost report displays the cost report options dialog box.



Step Daily Report

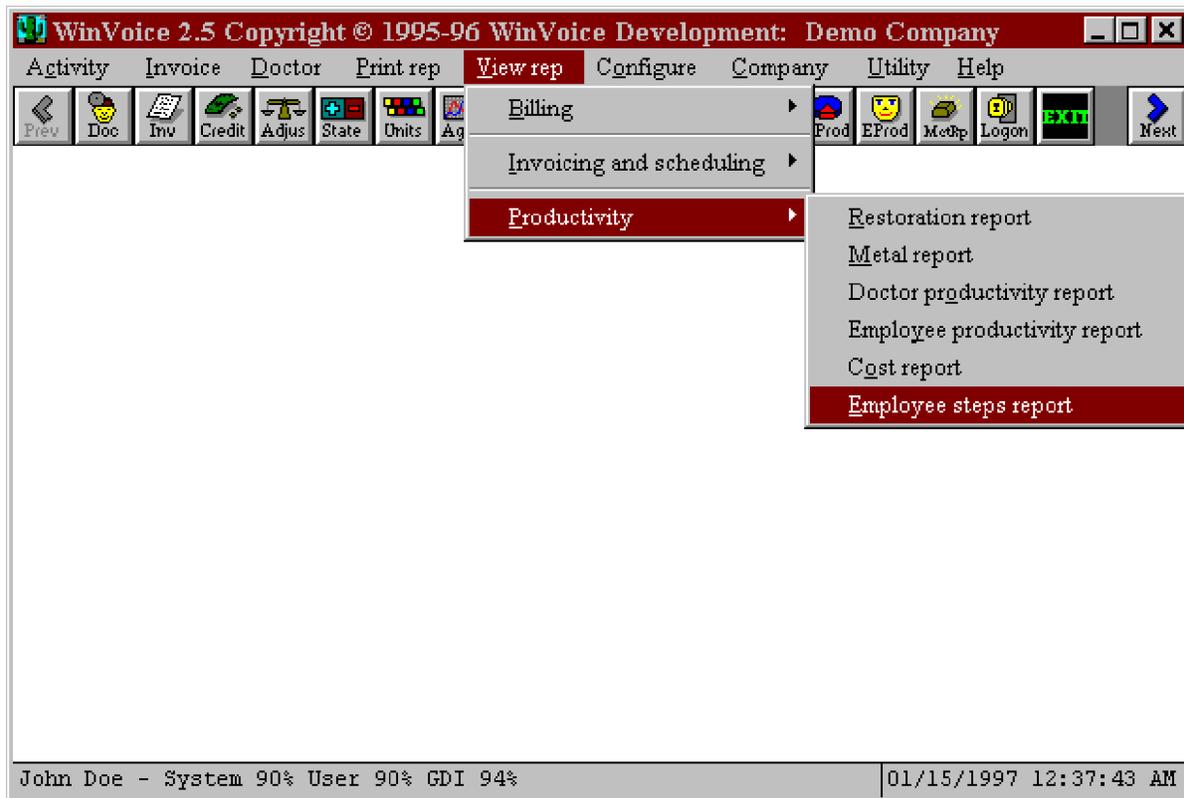
The Step Daily report gives a listing of steps to be completed on cases that are scheduled for a given day. This report works in conjunction with the AutoScheduler. You may use it to give your department heads steps to complete for a given day to help insure that they meet your production schedule. To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



Upon selecting the report you are presented with the Step Daily Dialog box.

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 either the select *Report* icon or select it from the menu.

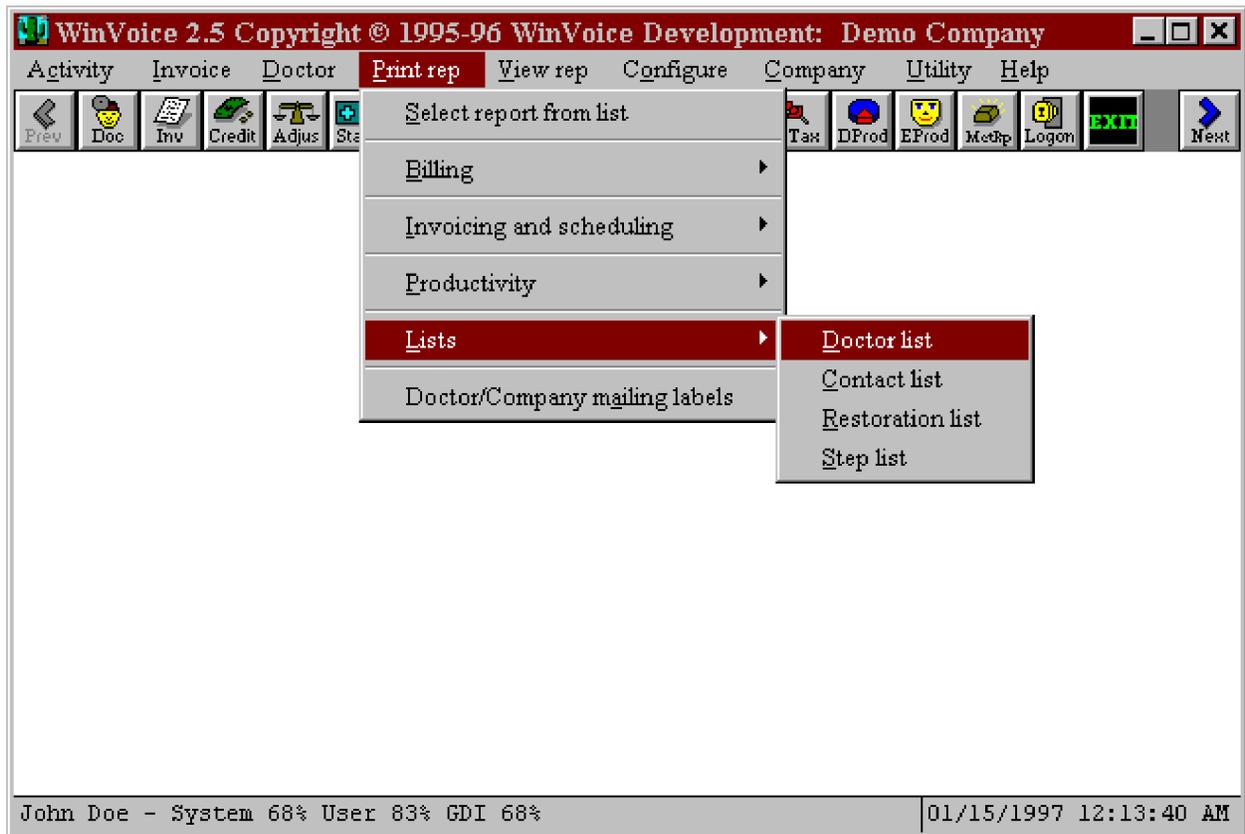


Upon selecting the report you are presented with the Employee Steps Report Options Dialog box.



List Reports

List reports allow you to print your configuration lists. This allows you to verify that your configuration is correct or for backup purposes. You may print your doctor, restoration, or step list. The contact list is similar to the doctor list. The option is available through either the *Reprt* icon or from the menu. from the menu.



Note: To generate the invoice list report. First go to invoices, set your view options, then select *Activities->Print invoice list* from the menu bar at the top of the dialog.

Utilities

Utilities are auxiliary programs that operate independently from the main **WinVoice™** program, they serve to enhance the capabilities of **WinVoice™**. It is possible to create shortcuts/icons to run these utilities without first executing the main program.

Backup

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 it's routine use! Nothing can be as frustrating as spending hours entering data into a computer and loosing 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.*

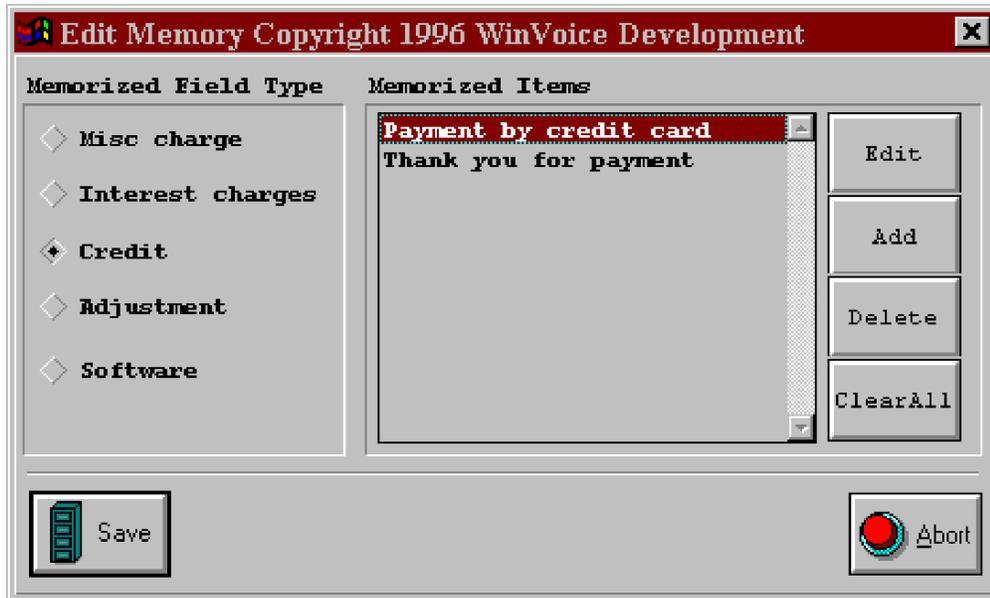
To backup, click the Backup icon  on the button bar or select *Utilities->Backup* from the menu bar. Once the backup program is loaded, select the "Backup" radio button. Accept the default in "Source Path" (usually "C:\WINVOICE\"), insure that the "Destination" drive is correct (usually "A:\") for a 3 ½ 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 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, 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 *Scan Disk* (a Microsoft utility program) or other disk utilities to check your diskettes for errors. See your Window 95's or MS DOS manual for additional information on *Scan Disk*.

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.

Tips and Tricks

- ! You can quickly edit an item by double clicking on any item contained in a list dialog box
- ! 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 speeds 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. It can very quickly eliminate any potential problems with both backup disks and your hard drive.**
- ! On a network, move the win*.dll files from the **WinVoice™** directory into the Windows directory of the clients on the network. The clients will run faster.
- ! 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 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.

- ! **WinVoice-Net**[™] clients can get faster access on nodes by moving WIN*.DLL's from the \winvoice directory on the server, into the \windows directories of all the nodes. This speeds up access by reducing the network access to the server.

Support

If you have a question about **WinVoice™**, 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™**.
- ! 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 which 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. Also run scandisk(which is a utility included with Windows, Start->Programs->Accessories->System Tools->Scandisk), select your (C:) drive, then select Standard test, and Start. Restarting and scandisk fix most technical support calls.
- ! **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? 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. Does the error occur while printing, or after printing several items? If so, your printer drive may be out of date, contact your printer technical support and have them install the latest version, or ask them how to switch over to the microsoft universal driver for your particular brand of printer.

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 your 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

Administrative Employee	The employee of a company that has total security privileges.
Accounts Receivable Letter	A text file that is used to format the design of the print out that is sent to doctors who are past due on their accounts.
Adjustment	A correction to a doctors account. Can be positive or negative.
Archive	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.
Backup	The process of storing the WinVoice™ information and placing it in a safe location in case of system failure or operator error.
Closing	Indicating that an invoice is complete and should be billed to the doctor.
Collection	A credit (payment made by a doctor to your lab).
Company	Your lab or a business. WinVoice™ allows multiple companies.
Completed	An invoice that has been closed and charged to a doctor's account.
Credit	A Payment/Collection from a doctor. Credits are applied to a doctor's oldest invoices.
Department	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.
Design	A specific style to follow when producing a restoration.
Doctor	Individual or business that has authorized work on an invoice and who will be charged for the invoice.
Employee	An individual who is authorized access to WinVoice™ or who is used to record steps completed.
Interest	An amount charged on unpaid balances, (that are older than the start of the last period).
Invoice	A record of services to be preformed for a doctor.
Logon	The start of a session in WinVoice™ . To logon, select an employee name, enter the correct password and optionally, select the archive you wish to use.
Metal	Material used to create a task. Generally has a weight associated.
Notice Form Letter	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.
Opening Balance	The total amount a doctor owes your lab before the start of the first period. This information is changed by the software when archiving occurs. Opening balances should NOT be changed after verified as being correct.
Password	A unique sequence of characters kept secret that is used to secure companies or parts of WinVoice™ from unauthorized use.
Payment Types	How an invoice is to be paid for.
Period	A billing cycle, normally every 28 days. Periods are used for statements to indicate when billing begins and ends.
Remake	An case or invoice that has been processed before.

Restoration	A procedure that is to be performed when processing a case. Restorations have steps and units assigned to them.
Sales	Closed invoices that are billed to a doctor.
Scheduled	When an invoice/case is to be completed and shipped.
Shipping Types	How the invoice/case is to be returned to the doctor.
Statement	Indication of how much a doctor owes. Statements show invoices that have not been paid for.
Status Types	Optional field not used by most labs.
Steps	A set of procedures that must be performed to complete a restoration. Steps can be assigned to individual employees when invoices are created, thereby tracking employee productivity and piece rate payments.
Tasks	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).
Text File	An ASCII file that is used by WinVoice™ to format a printed report. See .TPF, Notice Form Letter, and Accounts Receivable Letter.
.TPF	A type of text file that is stored in the root directory of WinVoice™ . It is used to format printed reports. Assistance in creating a custom .TPF is available from WinVoice Development . See also: Text file.
User	Anyone logging onto system. See Employee
WinVoice™	In this manual, refers to WinVoice-Lite™ , WinVoice-Pro™ , or WinVoice-Net™ .
WinVoice-Junior™	A separate software package developed for smaller laboratories.
WinVoice-Lite™	Very similar to WinVoice-Pro™ but does not have multiple companies, employee security, or archiving. Discontinued as of July 1, 1998.
WinVoice-Net™	Very similar to WinVoice-Pro™ but allows multiple users to access data at the same time. Includes an employee--employee note capability.
WinVoice-Pro™	Our flagship software package. It has multiple companies, employee security/productivity and step assignment.

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