

# Lab Manager 97

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## WHAT IS LAB MANAGER 97 ?

**Lab Manager 97** is a computer based production management and accounts receivable system. It has been designed to enable you, the manager of a dental laboratory, to know at all times what you are selling, who you are selling it to, and who is producing it. It also schedules (Release 2) each case through the laboratory, and lets you know when you have more work than your normal capacity will allow.

Further, **Lab Manager 97** automatically generates professional looking work tickets, invoices, and monthly statements. Finally, and perhaps most important, **Lab Manager 97** gives you up to the minute information regarding your receivables.

## WHY DO WE CALL IT LAB MANAGER 97?

This new Windows program is much more than just another DOS program converted to run under Windows. The fact is, **Lab Manager 97** is a brand new product and has little in common with the DOS version.

DOS limited us to primitive graphs, word processing, and little mouse support. In the Windows version there are no such limitations. In fact, instead of spending years developing a great word processor and spread sheet program to take the place of the old DOS version products, we have wisely chosen to integrate **Lab Manager 97** with the best Windows products such as Microsoft Word for word processing and Microsoft Excel for creating spread sheets and graphs to analyze **Lab Manager 97** data. **Lab Manager 97** will be fully integrated with Microsoft's Office 97 providing the user with the best and most powerful tools available. Imagine using **Lab Manager 97** to do all your billing, scheduling, and production management functions using it's new Windows point and click interface and produce beautiful, professional looking sales and marketing letters with the world's most powerful word processor and create an unlimited number of graphs to analyze your **Lab Manager 97** data using Microsoft's excel, and imagine doing all of this without ever leaving **Lab Manager 97**. We see **Lab Manager 97** as one piece of a suite of products all working together.

## WHAT IS MICROSOFT OFFICE?

Microsoft Office (95 or 97) is a collection of full-featured products that work alike and work together as if they were a single program. They take you well beyond the usual approach to ease of use, integration, and custom solutions.

Microsoft Office includes Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Access (Office Professional). Microsoft Office also includes a workstation license for Microsoft Mail. To use Microsoft Mail, your organization must also acquire Microsoft Mail for PC Networks, Server version.

## **DO I NEED MICROSOFT'S OFFICE 95 OR OFFICE 97 TO USE LAB MANAGER 97?**

No. You will not need either of these packages to use **Lab Manager 97**. However, if you want to be able to create letters, quick memos, or perform a mail merge (merging doctor names and addresses onto a document) you will need Microsoft Word. If you want to create custom graphs and spread sheets of your **Lab Manager 97** data you will need Microsoft's Excel. *Microsoft Office includes both of these programs.*

## **IS THERE ANYTHING LAB MANAGER 97 WON'T DO THAT THE DOS VERSION DOES?**

Yes. The first release of **Lab Manager 97** will be roughly the same as the DOS program's modules 1 and 3 providing both billing and production management. Later in 1997 we will ship **Lab Manager 97** Release 2. Release 2 will add to the first release, scheduling, technician production, and bar coding. The two releases together will do roughly everything the DOS version does and more.

## **DO I HAVE TO RE-TYPE MY DATA INTO LAB MANAGER 97?**

No, for most users. If you are using Lab Manager version 16, your data will be converted for you. If you are using Lab Manager version 15 or 15.02, you will have to use a special utility provided with **Lab Manager 97** to convert all of your data. If you are using a version of Lab Manager older than 15 then you will have to transfer the data manually by typing your information into **Lab Manager 97**.

## **WHO CAN USE LAB MANAGER 97?**

**Lab Manager 97** was developed initially with the small to medium sized dental laboratory in mind. However, recent technological developments, such as low-cost high-capacity mass storage devices and multi-user microcomputer systems, enable **Lab Manager 97** to be a valuable management tool to even the largest laboratories. **Lab Manager 97** is expandable, and will grow as your business grows.

**Lab Manager 97** requires no specialized knowledge of computers. The daily operation of **Lab Manager 97** can be performed by anyone reasonably adept in office procedures. Some skill in typing would be helpful, but not necessary.

## **IS LAB MANAGER 97 EASY TO USE?**

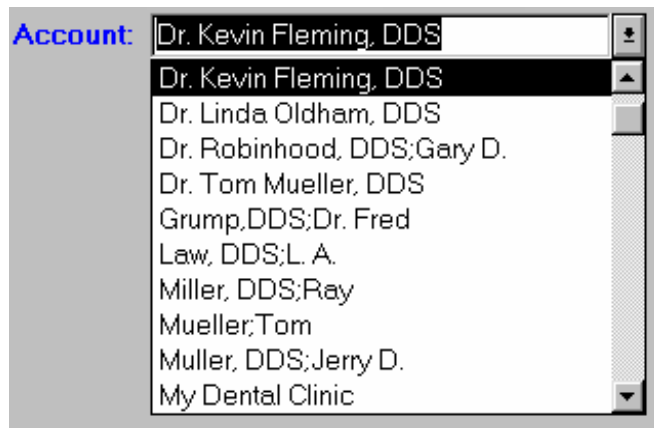
Yes. **Lab Manager 97** was designed to be used by people who know nothing about computers. Day to day use is so simple that most people can learn to use **Lab Manager**

**97** in just a few days. Our complete training only takes two days (if you elect to use our installation and on-site training). Many users have implemented **Lab Manager 97** over a weekend while others have taken more time and have done it in a week or two.

Using **Lab Manager 97** is simple, all you need to do is make choices from items on the screen.

Depending on your selection, the computer may display another set of options for you to select from.

In places where the computer requires a name or account number, you would simply fill in the space provided by typing on the keyboard. To make it even easier, **Lab Manager 97** has helpful information built right into the program. Most anywhere in the system where information is asked for, such as account numbers, case numbers, product, material, and technician numbers, **Lab Manager 97** will tell you what answers are allowed. All you have to do is click on one of the drop down list boxes. A list of items will then be displayed to choose from.



**Lab Manager 97** includes an on-line "context sensitive" computerized manual. Context sensitive means that when the help key is pressed, the computer automatically jumps to and displays that part of the manual which describes the function you were performing when the help key was pressed. This help is always available at the touch of a key. With this function the user can easily read the manual page by page, make searches or inquiries of the manual, or print all or portions of the manual.

## LAB MANAGER 97 FEATURES

The features described here cover all **Lab Manager 97** modules. Unless you purchased all modules, not all the features described will be available.

**CASE ENTRY:** The heart of the system. Each case is entered into the computer as it is received in the lab. The computer assigns a number to each case automatically. Case entry is as easy as "filling in the blanks" on the screen. With very little practice, cases can be entered and scheduled in less than 20 seconds. Locating a case in the computer is easy. A case can be located knowing one of several items including the doctor number or patient's name.

**AUTOMATIC SCHEDULING:** (Module 2) Each case is scheduled through the various production steps that you define for each product. YOU pre-define the maximum number of units per day your laboratory can complete along with the non-working days (such as Saturdays, Sundays, and holidays) which the computer will use to schedule each case. If you can not accept the automatically computed delivery date, you simply manually schedule the case by entering the dates from the keyboard. Whenever necessary, cases can be rescheduled.

**DOCTOR INFORMATION:** **Lab Manager 97** keeps track of important doctor information such as name, address, phone number, a sales code used for categorizing doctors for sales and tax purposes, tax rate (each doctor can have a different sales tax rate,) credit limit, 30, 60, and 90 day due totals, year to date total, service charge rate, discount rate, payments, and special preferences.

**TECHNICIAN INFORMATION:** (Module 2) **Lab Manager 97** keeps track of your technician's name, address, phone number, social security number, month to date production, year to date production, and hours worked.

**PRODUCT INFORMATION:** Information on each product that you sell is also stored by **Lab Manager 97**. Information such as the product description, code, retail price for each of the 12 price lists, production steps used to make this product, and the department number. Up to 9 departments can be defined, each with their own set of products. A special user definable product code provides a means to summarize product usage for the more important products.

**PRODUCTION STEP INFORMATION:** (Module 2) Production steps are the individual steps used to produce a given product. With each step, **Lab Manager 97** stores the step description, code, production time in days, step value (for technician production), and the maximum number of this step that can be done in one day (in your lab).

**MATERIAL INFORMATION:** **Lab Manager 97** stores information on materials such as gold, teeth, and attachments; those materials which you charge for. The following

information is maintained on each material; description, code, units (pennyweight, ounce, each,) quantity in stock, percent mark up, re-order point, re-order quantity, vendor number, quantity sold year to date, cost sold year to date.

**VENDOR INFORMATION:** Information on each of the vendors you buy materials from is also kept by **Lab Manager 97**. Information such as name, address, phone number, contact, credit terms, and special instructions are stored.

**MARKETING INFORMATION:** Information on potential accounts can be stored in this file for marketing purposes. Store their name, address, contact, birthday, seminars attended, materials sent, last contact date, and follow up date (among other things).

**SALESPERSON INFORMATION:** Information on your sales people can be kept in this file including, among other things, name, address, social security number, area, and commission rate.

**PRINTED WORK TICKET:** A work ticket is printed for each case that is entered. This work order accompanies the case through the laboratory, and includes the following information.

- Doctor's name, patient's name, case number, date entered, date due. The doctor's name and related information can be optionally suppressed if desired.
- All products involved, along with tooth numbers relating to each product and shade.
- Doctor's standing orders (preferences).
- Each production step that you have defined for the first products involved, and the computed date of completion for each step (Module 2 only).
- An area on the work ticket for recording the production information and materials used.
- With our optional bar-coding hardware and software, the work ticket includes bar-codes of each production step that can be scanned by the technician as the step is finished giving credit for that step to that technician.

**CASE ENTRY REPORTS:** An almost unlimited number of case related reports can be printed.

**INVOICING:** When a case is finished, case information such as materials used, shipping charges, misc. charges, and discounts can be added or updated. The system can then print invoices, calculating the sales tax (where applicable) automatically. The invoices are designed to be mailed using our double windowed envelope or they can be used as a shipping label using one of our shipping envelopes

With our optional bar-coding hardware and software, **Lab Manager 97** adds a bar-code to each invoice to be used for tracking cases.

**QUALITY CONTROL:** A quality control sheet of your own design can be automatically attached to each invoice. Multiple QC sheets can be defined and keyed to the different departments to allow the computer to automatically select the QC sheet that fits the work shown on the invoice.

**INVOICE REGISTER:** The invoice register can be printed listing and totaling all invoices for the month or for any specific date within the month.

**PAYMENTS, CREDITS, DISCOUNTS AND ADJUSTMENTS:** Payments are entered quickly and easily from the keyboard as they are received. A cash receipts journal can be printed daily or as needed. Special credits and discounts can be entered in the same way that the payments are entered but are summarized separately.

**STATEMENTS:** After the last case for the month has been invoiced, the statements can be printed. Statements detail all account activity for the month, listing all invoices by case number and patient's name, along with all payments by check number. Total of current charges, as well as 30, 60, and 90 day balances are shown. An optional sales message or other greeting can be printed on the statement. The printed statements can then be folded in half and placed in our double windowed envelope for mailing. This means that what previously required hours, can now be accomplished in just a few minutes.

**AGED TRIAL BALANCE:** This report can be printed at any time to summarize each of the doctor's accounts. The report shows the total of any payments made, current charges, 30, 60, and 90 day past due balances, etc.

**LEDGER CARD:** Shows account information, past due balances, current charges, service charge, payments, and ending balance all on an easy to read screen for a given account.

**CREDIT LIMIT REPORT:** This report can be printed any time to list any doctors who have exceeded their credit limit.

**SYSTEM STATUS REPORT:** This report can be printed any time to summarize the exact status of the laboratories case load, cash receipts, accounts receivable, and other useful information.

**PRODUCTION ACCOUNTING:** Production related reports such as technician production, department and account production are also included in **Lab Manager 97**.

**MATERIAL RELATED REPORTS:** These reports are provided to show how much of each material is currently in stock, how much of each material has been used, and which materials need re-ordering.

**DELIVERY LIST:** A list designed to be given to the delivery person listing cases to be delivered automatically organized by route.

**ARCHIVE SEARCHES:** **Lab Manager 97** provides a simple means to find old cases that have long since been returned to the doctor. Search by patient name, account, case number, pan number, etc. Old payments, credits, discounts, and adjustments can also be found using an archive search.

**MULTI-MONTH REPORT SUMMARIES:** Sales, production, and remake summaries can be created spanning any time period **Lab Manager 97** has been in use. Compare monthly sales side by side. Graph this data and/or export it to your favorite spreadsheet program using **Lab Manager 97**'s graph and export functions. **Lab Manager 97** is designed to interface directly to Microsoft Excel making it easy to create spread sheets of **Lab Manager 97** data.

**CONTEXT SENSITIVE ELECTRONIC MANUAL:** **Lab Manager 97** has the complete user manual stored on disk. When a question arises on how to do something within **Lab Manager 97**, click on the Help button and **Lab Manager 97** instantly displays the section or page of the manual that pertains to what you are trying to do. For example, if you have a question about entering a case while you are doing so, click on Help and it displays the page in the manual explaining case entry. This is what is meant by "context sensitive," it is sensitive to what you are doing. In addition to this feature, the manual can be printed, searched, and/or read page by page.

**ADDITIONAL HELP:** In addition to the context sensitive electronic manual, **Lab Manager 97** offers help wherever an account, product, case, technician, material, or department number is required. If you don't know what number to enter, you need only click on the drop down list box beside the field and choose the account, product, case, or material you desire. You don't have to memorize numerous account numbers.

**CLINIC AND GROUP DOCTORS SUPPORT:** **Lab Manager 97** supports clinics and group doctor practices. This allows you to treat a group of doctors as one entity, yet at the same time allow separate sales summaries on the statement for each doctor.

**REMAKE REPORTING:** Remakes are reported in two ways. First as a function of sales, and second as a function of production.

**SALES TAX REPORTING:** To make sales tax reporting easy, **Lab Manager 97** will summarize all sales for each tax jurisdiction in which you do business. **Lab Manager 97** will automatically apply the sales tax rate appropriate to each of your dentist-clients.

**STATE REGISTRATION NUMBER AND REGISTRATION DATE:** Required in some states, a state registration number and date can be defined if necessary, and will automatically be printed on all correspondence to the doctor.

**PASSWORDS:** **Lab Manager 97** supports a different password for each technician/employee. With each password, the user can define which menu options, and reports the user of that password will have access to.

**ACCOUNTING SYSTEM POSTING:** **Lab Manager 97** will eventually post to the Quick Books account system for Windows. **Lab Manager 97** handles all accounts receivable functions and Quick Books handles the accounts payable, general ledger, and payroll. This feature may be available as an extra option to be added shortly after the initial release of **Lab Manager 97**.

**EXPORT DATA:** **Lab Manager 97** information can be exported to most any database or spreadsheet program. Use this feature to export sales or production information to your favorite spreadsheet program for the ultimate in custom reporting and graphing.

**ONE TOUCH GRAPHS:** View graphs of sales, product production, and material usage with the touch of a single key.

**TIME CARD REPORTING:** Enter, calculate, and print reports on time card activity (Module 2).

**BAR-CODING:** (Module 2) **Lab Manager 97** offers bar-coding to track technician production, shipping and delivery, and inventory control (Available in Release 2).

## **EASY TO LEARN**

**MENUS:** **Lab Manager 97** incorporates easy to use menus showing a list of choices or buttons. To perform a desired function, simply click on the desired button. Choosing an item from one menu may display yet another menu. Moving through **Lab Manager 97** is as simple as making choices from the displayed menus.

**INTUITIVE:** **Lab Manager 97** understands dental laboratories and the processes performed in them and will attempt to answer your questions for you by providing the correct default answers.

**CONTEXT SENSITIVE ELECTRONIC MANUAL:** Refer to the previous section for a detailed description of this helpful feature.

**FIELD BY FIELD HELP:** **Lab Manager 97** offers detailed help on each “field” or item you are entering. This information changes as you move from field to field and is displayed at the bottom of the screen.

**TRAINING VIDEO:** To help you quickly learn the basics, a training video is available for a small fee. Check with our sales department for price and availability.

**PHONE SUPPORT:** As good as the program and its manual is, rest assured that a friendly, helpful voice can be found on the other end of the phone. Trained personnel are available to answer questions, solve problems, or offer suggestions. You may choose from several support plans to suit your needs

## COMPATIBILITY

**Lab Manager 97** is compatible with IBM compatible computers using Microsoft Windows 3.1 or above.

**Lab Manager 97**'s network version is network compatible with most network operating systems including Novel and LANtastic.

**Lab Manager 97** is compatible with most dot-matrix, laser, ink jet, and bubble jet printers.

Lab Manager 97 provides a conversion program to convert the data from the previous version of **Lab Manager 97** to the next version (when necessary). If a version is skipped, manual data entry might be necessary. *To avoid incompatibility, Lab Manager 97 should be updated with each new release.*

**Lab Manager 97** can also export its own data to other programs such as a database or spreadsheet by creating specially formatted data files defined by the user.

## SYSTEM REQUIREMENTS

To run **Lab Manager 97**, you must have the following.

- 80586 (Pentium) computer or better
- 32Meg of Ram or more
- 30Meg of free hard drive space just for **Lab Manager 97**
- 200Meg of free hard drive space if you intend to add Microsoft Office to your computer
- Windows 95 or above
- Dot matrix, inkjet, or laser printer
- Mouse
- Tape drive or Zip drive (recommended for backups)
- CD-ROM (recommended)
- Microsoft Office 95 or above (optional)

## COPY PROTECTION

For your convenience, **Lab Manager 97** is not copy-protected. Please remember that the license agreement states that your copy of **Lab Manager 97** can only be used on a single computer at a time (unless you have a multi-user license). Illegal copying and use of **Lab Manager 97** is a violation of copyright statutes and is punishable by law.

## IMPORTANT PRELIMINARIES

To make setting up **Lab Manager 97** as easy as possible, you should take some time to organize the information you intend to put into **Lab Manager 97**. Organize your account, product, and material lists. If you intend to take advantage of our powerful scheduling features, you will need to decide what production steps your technicians perform to make the various products you sell. Products include the labor items such as your crowns and bridges. Materials are the things you keep in inventory such as gold, teeth, and attachments. Production steps include "preparatory, frame wax-up, sprue, invest, and wax" to name just a few.

## REGISTRATION PAGE (NEW USERS ONLY)

Please return the warranty registration page included with this package. Only registered users of **Lab Manager 97** will receive information about new releases of the software when they become available and *only registered users are eligible to receive technical support*.

## **MOST COMMONLY ASKED QUESTIONS**

The following will answer some of our most often asked questions.

**WHAT COMPUTER DO I NEED?** See System Requirements

**APPLE COMPUTERS:** **Lab Manager 97** has been designed to operate on IBM compatible computers, however, software and hardware does exist that will allow an Apple computer to operate an IBM compatible program like **Lab Manager 97**. Check with Apple Computers or your local computer store for more information on this special program.

**WHAT TYPE OF PRINTER SHOULD I BUY?** There are basically three types of printers; dot matrix, inkjet, and laser. The dot matrix printer is very fast and usually has a very long lifetime, but because the print quality is normally not as good as the inkjet or laser printers, it is used mostly for report purposes such as the printing of work tickets, invoices, statements, and accounting reports. If you want to print invoices and statements on two-part forms, we recommend a dot matrix printer. If you are going to be using your computer exclusively with **Lab Manager 97**, look for a printer with a printing speed of at least 120 characters per second (CPS). These printers generally cost between \$200 and \$600. If "letter quality" is important, look into a letter quality dot matrix printer like the 24 pin printers we sell. These are more expensive, but well worth the extra money because they combine the qualities most desired; letter quality print and high speed.

Laser and inkjet printers are supported by **Lab Manager 97** for most forms and reports. Laser and inkjet printers can not print on a two part form like a dot matrix printer.

If you buy a dot matrix printer, make sure it includes a tractor mechanism. The tractor or pin feed mechanism is very important for dependable paper feeding. Many printers have built-in tractor or pin feed mechanisms which work just fine.

Generally speaking, the more you pay for a printer, the longer it will last and the better the print quality and speed will be.

**NOW WHAT DO I DO?** Once **Lab Manager 97** has been installed, starting it for the first time will display **Lab Manager 97**'s Start-up Wizard. The wizard will help you to define your laboratory information such as departments, products, and production steps (this is where the larger "Electronic Manual" is helpful).

**CAN I START USING THE SYSTEM AFTER I GET EVERYTHING TYPED IN?** Yes, but we have found that after a little use you will want to make improvements to the information you defined. You can expect an adjustment period of a few months. As you become more and more familiar with the program, you will want to "fine tune" the system to your needs. You should use the computer along side your current manual system for a period of time adequate to insure accuracy (at least two months).

**WHO DO I CALL IF I HAVE TROUBLES?** There are qualified support people at LSG who can help you. **If you have troubles, however, start with Lab Manager 97's built-in help**, it has been designed to answer most of your questions. If you still have a question, check the support plan that you currently have for your support options and then call our support staff at 1 (602) 264-5913.

## **PHONE SUPPORT**

### **Think You Don't Need Phone Support? Consider this...**

The day your computer gets zapped by a pesky power surge, or hiccups, or the day your computer operator announces they're history... you may realize it just ain't so. You can protect yourself from unexpected and unplanned consulting charges by picking up an inexpensive phone support contract. For example: A 3 minute call with no support plan costs \$25. The same call with pre-pay support plan is only #3.33, and there's no bill!

**That's quite a difference!** It's easy and inexpensive protection.

**This NEW phone support plan is a real bargain.** It cost far less than other vendor-provided support. For instance, Microsoft's plan begins at \$35.00/call and Borland charges \$2.95/minute. One of our competitors charges \$4.00/minute.

We at LSG offer pre-paid support plans for as little as **\$1.11/minute**). The more you buy now, the more you save.

**This NEW phone support plan has no expiration date.** Think of it like a phone card with 60 to 180 minutes on it. It can be used until the card runs empty. We will track the actual minutes used and will notify you when it is about to be used up.

If you talk for 3 minutes we subtract only 3 minutes. The rest is there when you need it. It could last for years.

**Save money!** Get phone support in 1998 and beyond at 1997 pre-pay prices.

1 HR Support Plan ..... \$80.00

2 HR Support Plan..... \$150.00

3 HR Support Plan..... \$200.00

**Phone support plan hours:** Monday through Friday, 8 AM to 5 PM - MST

Support plans do not cover "After Hours" calls. **"After Hours Support"** is billed at \$2.00/minute with a \$25.00 minimum and applies to ALL calls received outside of normal business hours, on holidays, or on days that LSG is closed.

**No support plan option:** \$25/call with a minimum at \$90/hour. COD accounts will be asked for a VISA or MasterCard number before support is offered.

*Please Note: The time in Phoenix, Arizona, where Laboratory Systems Group, Inc. is located, is the same as California (the West Coast) from the first Sunday in April until the last Sunday in October. All other times, Phoenix, is one hour later. When calling for support, please keep this time difference in mind. Calling from the East Coast at 8:00 in the morning can be 5:00 in the morning in Phoenix. This can be an advantage because you can call after 5:00 East Coast time when your phone is quiet and still get standard phone support.*

**WHAT DO I DO IF I GET AN ERROR MESSAGE ON THE COMPUTER?** If everything is working properly, you should never get an error message, however, if one should occur, and the reason is not obvious, call LSG and read to us the exact error message as it is displayed on the screen. In some cases we will ask you to type a few things into the computer to help us determine what the problem is.

Most errors, we have found, are related to the hardware, computer configuration, data or a printer problem. By maintaining proper backups, a problem with the diskette is easily fixed. Printer problems, generally, are very simple also; out of paper, bad printer ribbon, incorrectly installed paper, printer is turned off, printer is off line, etc. If you have a problem, call us. We can help you determine what the problem is.

In some cases where the problem appears to be with the hardware (the computer itself) we will instruct you to contact your local computer dealer or repair facility. If you purchased the computer from us, you may have "on site" service available. Contact us for more details on "on site" service.

## **HISTORY OF LAB MANAGER 97**

In late 1979, David W. Stevens C.D.T., the owner and manager of a five technician laboratory, began to investigate the possibility of using a microcomputer in a small dental laboratory. With no easily obtainable information on the subject available to him, he decided to "take the plunge" and purchased a computer.

Using "off-the-shelf," general purpose software, he computerized the accounts receivable system in his laboratory. In time, he was using the computer for mailing list management, word processing, budgeting, and inventory control. It became apparent early on, however, that optimum use of a computer could not be achieved without software specifically developed for a dental laboratory. It was determined that all existing dental laboratory systems were very expensive, and clearly out of reach of the small dental laboratory. So, after several months of planning and defining the needs of the dental laboratory, he contacted Tom Mueller and Associates, a software development

house, and, after a long and complete feasibility study, work was begun on a comprehensive dental laboratory management system.

The work took over two man years of development and testing. It was important that the system be inexpensive, easy to use, and had to be able to grow with and adjust to each individual laboratory.

The results of this work is **Lab Manager 97**, and is now available world wide from Laboratory Systems Group, Inc. Other products available for the dental laboratory include word processing, a spread sheet program, payroll, general ledger, check writing, mailing list management, accounts payable, and bar-coding, to name just a few.

## **TYPICAL MONTHLY SCENARIO**

The following describes how **Lab Manager 97** might be used during a typical month and assumes that the system has already been installed, that is, all departments, products, production steps, materials, doctor's, etc., have been defined.

## **LOGGING IN A CASE**

As a case comes into the lab it is placed into a numbered pan. (Pan numbers are optional, but are helpful in locating cases.) The pan and the doctor's prescription are brought to the computer where the case information is entered into **Lab Manager 97**. This is done using the "Case entry and update" selection at the "Main program menu." Click on the "New Case" button and **Lab Manager 97** displays a new case for you to fill in.

This screen is much like a form, with titled blanks that will be filled in. It is here that certain basic information concerning the case is entered into the computer. This information includes the doctor's account name, the patient's name, and the type and number of restorations or appliances to be produced, along with the tooth numbers and shade. If the doctor requests the case by a specific date, that can be entered into the doctor's due date. Information that can be typed in later includes type and quantity of materials used, shipping and handling charges, and miscellaneous charges. All new cases are automatically given an OPEN status. A case will remain in the computer for as long as it is OPEN. Later when the case is finished, we will CLOSE it to signal the computer that the case is ready to be invoiced.

## **ADDING PRODUCTS AND MATERIALS TO A CASE**

Products are assigned to the case by clicking on the “Products” tab at the top of the case entry screen. Type in the product name or number or click on the drop down list box to select a product and then enter the desired quantity and optional tooth numbers. Materials will be entered later using the same process after clicking on the “Material” tab at the top of the case entry screen.

When the basic information has been entered, clicking on the EXIT button will signal the computer that the entry process is complete or click on the “New Case” button to enter another new case.

## **PRINTING A WORK TICKET**

To print a work ticket, exit the case entry screen and then click on the Report Menu button located at the Main Program Menu. From the Report menu, click on the Production tab and then click on Work tickets and then click on Print.

## **ACCOUNTING REPORTS**

A number of reports can be printed at any time listing case and accounting information. Some reports you will print daily, while others will be printed weekly and monthly. **Lab Manager 97** even has a "System status" report designed to be displayed each day summarizing your lab's status with such information as number of cases received today, number of open, closed, and invoiced cases, MTD sales, MTD cash receipts, and current accounts receivable balance.

## **INVOICING A CASE**

When a case is completed, return to the "Case entry and update" program, call up the desired case by its case number, and make whatever changes, and/or additions necessary. With the work ticket of the finished case in hand, type in the materials used, add any other products used along with any optional shipping and handling charges or miscellaneous charges. When done CLOSE the case by changing the status to closed and repeat the process with any other finished cases.

Now that the case is closed, an invoice will automatically be printed the next time you print invoices.

## PRINTING INVOICES

To print an invoice, exit the case entry screen and then click on the Report Menu button located at the Main Program Menu. From the Report menu, click on the Invoices button.

Upon completion, return to the "Main program menu" where you may decide to print a "Daily invoice register." The invoices are designed to be mailed in our double windowed envelope, used as a shipping label, or they may accompany the case back to the doctor.

## CLOSING THE MONTH

By the end of the month the processes described above have been repeated many times as cases enter and leave the laboratory. The next step is to print the month-end accounting reports such as the MTD Cash Receipts Journal, Aged Trial Balance, Invoice Register, and Department Production reports; to name just a few. All of these reports are optional, but recommended.

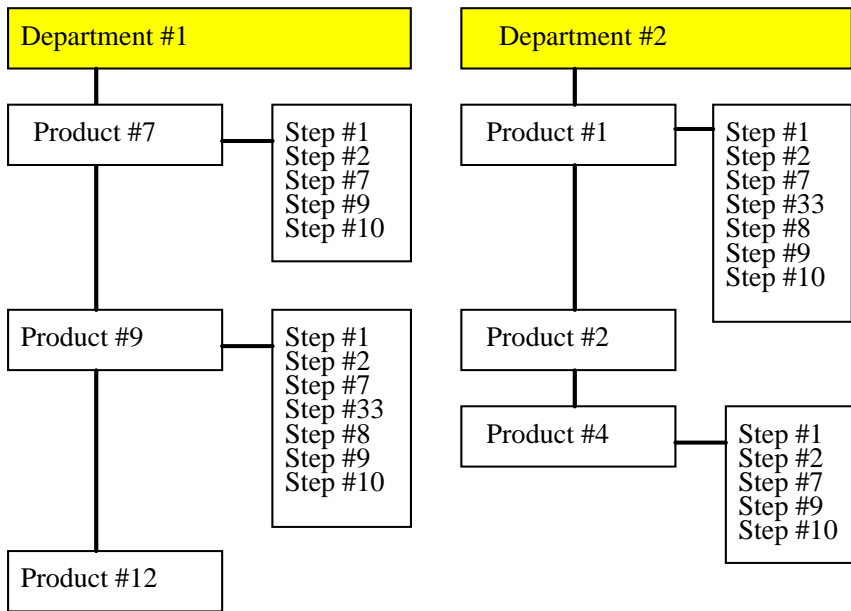
Now it is time to print and mail the Statements. The statements summarize the doctor's account activity listing each of the invoices sent that month along with any payments received and finally showing the accounts current, 30, 60, and 90 day past due balances.

Following the printing of the statements, and with your permission, the computer automatically performs end of month processing. This process archives the current data, updates the doctor's accounts, archives finished/statemented cases, reduces the quantity in stock of each of the materials billed, and updates a number of other files. When completed, you are ready to start entering cases and payments for the new month.

## DEPARTMENTS, PRODUCTS, AND PRODUCTION STEPS.

**DEPARTMENTS & PRODUCTS:** Lab Manager 97 allows an unlimited number of departments to be defined. Common departments include, "Crown & Bridge," "Denture," and "Orthodontic." Thousands of products can be defined in any or all departments. As each product is defined, it is assigned to one of your departments by placing a department number into the "Dept#" field.

**PRODUCTION STEPS:** Production steps are those processes your technicians perform in the lab on a day to day basis. These "Steps," in a crown and bridge lab, might include, "Preparatory," "Frame Wax-up," "Sprue, Invest, and Cast," "Frame Finish," "Porcelain Buildup," "Porcelain Contour," "Final Finish," and "Deliver." At some time, these production steps are assigned to the various products. The illustration below shows how these three different items interrelate.



## THINGS THAT NEED TO BE DONE EACH DAY

Out of all of **Lab Manager 97's** functions and reports, only one operation should be performed each day. **Lab Manager 97's data should be backed up each and every working day.** This requirement is not for **Lab Manager 97's** sake, but your own. If something should go wrong with the computer or the data in it, your only safeguard is with the daily backup of your data.

## THINGS THAT NEED TO BE DONE EACH MONTH

In addition to the day to day use, there is a process that must be performed at the end of each month. It doesn't matter when this process is performed, just that it be performed before starting the new month.

**WHEN:** The end of month reports need to be printed before starting the new month. This means before entering any payments or invoices for the following month. The date this is done makes no difference. You decide when you want to close one month and start the next month.

**OPTIONAL:** It is recommended that a number of reports be printed before closing the month. The purpose of these reports is to capture the important accounting and

production totals and detail before they are archived during end of month processing. These reports should include the Aged Trial Balance, Invoice Register, Cash Receipts Journal, Current Sales Report, Lab Status Report, Department Production Report by Department, Material Usage Report along with any others you would like. We recommend that you start with the Aged Trial Balance. Study it over for mistakes; missing charges, high past due balances, missing payments, etc. If a mistake is found, correct by re-invoicing, or entering the missing payment and then reprint the Aged Trial Balance. Once it looks correct, proceed to the rest of the reports.

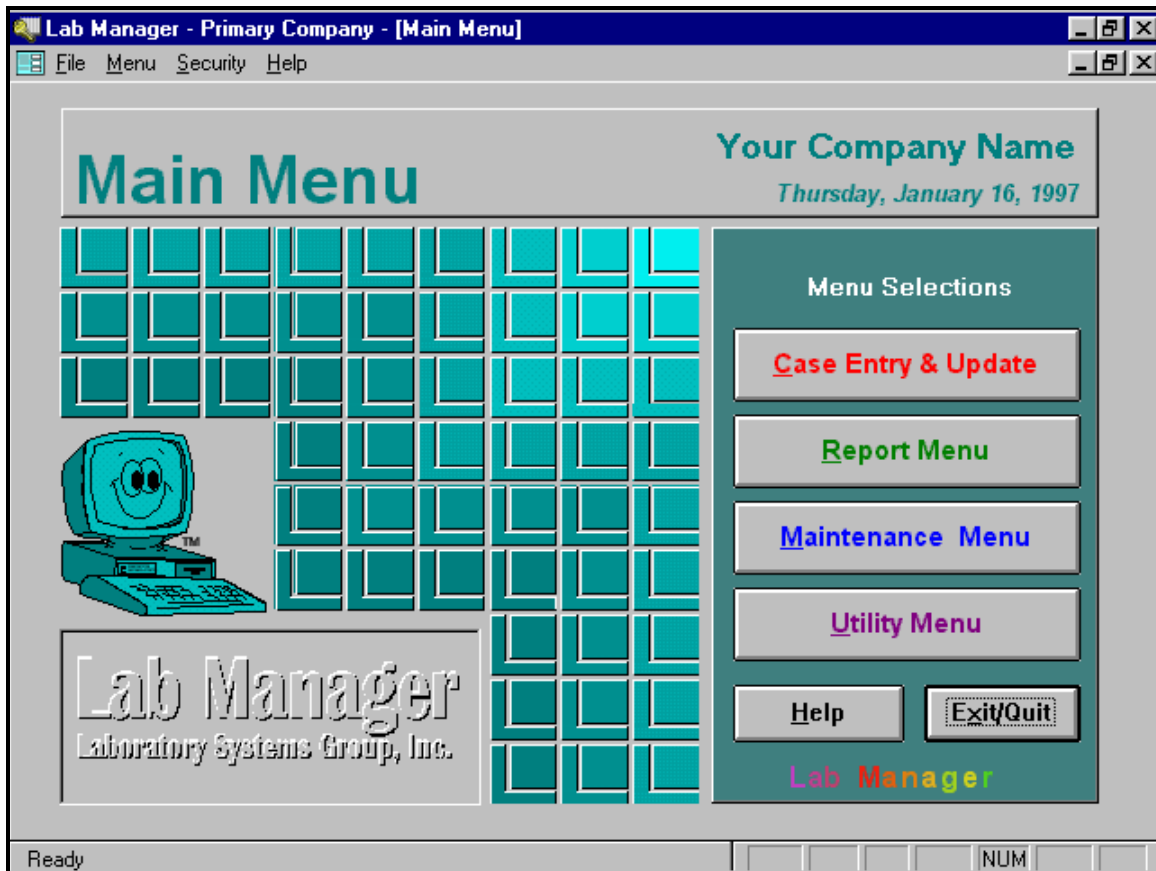
**MUST DO:** Once the billing information has your stamp of approval on it, "back up" the data to a diskette or tape, then label the diskette with the current date. Next, you are ready to print the monthly statements. Print the statements for ALL accounts, following the prompts. When all of the statements have been printed, the computer will ask if the statements are printed correctly. Look them over for physical defects. The totals should be correct because they will always match the Aged Trial Balance. If the statements have a problem, answer NO, correct the problem, and reprint them. If the statements are correct, answer YES and the computer will ask which month is being ended. Be sure to answer these questions correctly. At this point, the computer will do it's end of month processing. This process archives the current data, updates the inventory, and updates the account file. This process only takes a few minutes and will return to the Main Menu when finished.

## **THINGS THAT NEED TO BE DONE EACH YEAR**

**RESET YTD TOTALS:** At the start of your new fiscal year certain totals need to be reset to zero. To do this, start at the **Main Menu** and select **Utility Menu**. From this menu, select **Year End**. At the next menu, select "**Reset Year to Date totals.**" The process only takes a moment.

**CREATE A NEW CALENDAR:** (Release 2 only) At the beginning of the new year, a new calendar must be defined. To do this, start at the **Main Menu** and select **Utility Menu**. From this menu, select **Year End**. Next, select **Reset Calendar**. Follow the prompts until done.

# MAIN PROGRAM MENU



It is from here that all **Lab Manager 97** features and reports can be reached. To enter or update a case click on the Case Entry & Update button. To print or preview a report, click on the Report Menu and then click on the desired report. Click on the Maintenance Menu button to enter or update accounts, products, materials, etc. Click on the Utility Menu to access any of several **Lab Manager 97** utilities. Clicking on the Case Entry and Update button at the Main Menu displays the last case entered.

## THE CASE ENTRY & UPDATE SCREEN

Clicking on the Case Entry & Update button at the Main Menu will cause **Lab Manager 97** to display the last case entered. All of the case related information can be entered, changed, or just reviewed from here. The following describes the main features of this screen.

Near the top of the screen, in large letters, is the case number. This number will also be the invoice number when it is printed. Below the case number are 5 tabs; each described below.

## MAIN

Lab Manager - Primary Company - [Case Entry]

File Menu UnMark Security Help

Case:9702-197 Thursday, February 06, 1997 Exit

Main Products Materials Tooth#s Table

Status: Open CaseID: 197

Account:

Clinic Dr#:

Patient:

Received: 2/6/97 Schedule: 2/6/97

Dr's date: Pan#:

Ship by date: Shade:

Ship by time: Case code:

Invoice date:

Invoice Amount: \$0.00

Total of products: \$0.00

Total of materials: \$0.00

Discount: \$0.00

Tax: \$0.00

Total:

Finish date:

Delivered:

Articulator#:

PO#:

Archived:  Work ticket:  Post card:  Label:  New case:  Mark:

Dr's Items Notes Photo Undo Delete Add New Search

Record: 24 of 24

Form View NUM

The Main tab is used to show information such as the case status, account name, patient, receive and due dates. Click on the Products tab to enter the products associated with this case. Click on the Materials tab to enter the materials associated with this case.

To enter a new case, click on the **ADD NEW** button located at the bottom of the case entry screen. Select the account by clicking on the first small button to the right of Account. Choose the account you want from the list of accounts in the list box. Next, type in the patient's name next to Patient. You may optionally fill in information in the other fields on this screen such as Dr's date, Pan#, and Shade.

# PRODUCTS

Lab Manager - Primary Company - [Case Entry]

File Menu UnMark Security Help

Case:9702-198 Thursday, February 06, 1997 Exit

Main Products Materials Tooth#s Table

Product ID	Description:	Dept	Qty	Price List	Total	Remake	Sch	Tooth #'s
			1	0	\$0.00	No	0	

Record: 1 of 1

New Product Prev Next Add Delete

Record: 24 of 24

Enter products for this case. NUM

**Adding a Product to the Case:** When you are ready to add a product to the case, click on the Products tab at the top of the screen.

To enter a product by product number, type the product number into the Product ID column and press enter. Or, if you prefer, the product may be entered by product description by moving first to the Description column and typing in all or a portion of the product description.

But the most common method of selecting a product is click on the small List Box button in either the Product ID column or the Description column then clicking on the desired product in the list.

Press enter to move to the Qty column and type in the desired quantity.

The Price List will default to the appropriate price list for the selected doctor but can be changed on-the-fly by typing a different number in or by using the small drop down list box in that column.

The Total is automatically calculated but can be changed if desired by simply typing over it.

If the product is a remake, it can be marked as a remake by clicking on the drop down list box in the Remake column and selecting Yes.

The Sch column (applies only to **Lab Manager 97**'s scheduling module available separately) is used to indicate whether or not this product is to be scheduled. Zero will tell **Lab Manager 97** not to schedule this product. If several products exist, a number greater than zero will indicate the order the products are to be scheduled together. For example, if you have two products to be scheduled together, one to be scheduled before the other, then you would place a "1" in the Sch column for the product to be scheduled first and place a "2" in the Sch column for the product to be scheduled second.

## MATERIALS

Lab Manager - Primary Company - [Case Entry]

File Menu UnMark Security Help

Case:9702-198 Thursday, February 06, 1997 Exit

Main Products **Materials** Tooth#s Table

Material ID	Description:	Dept#	Qty	Cost	Total \$	Tooth Numbers	Taxed	DiscountAmt:
			1	\$0.00	\$0.00		No	\$0.00

Record: 1 of 1

New Material Prev Next Add Delete

Record: 24 of 24

Enter Materials for this case. NUM

**Adding Materials to the Case:** Materials are the billable materials such as gold, teeth, and attachments you bill the doctor for.

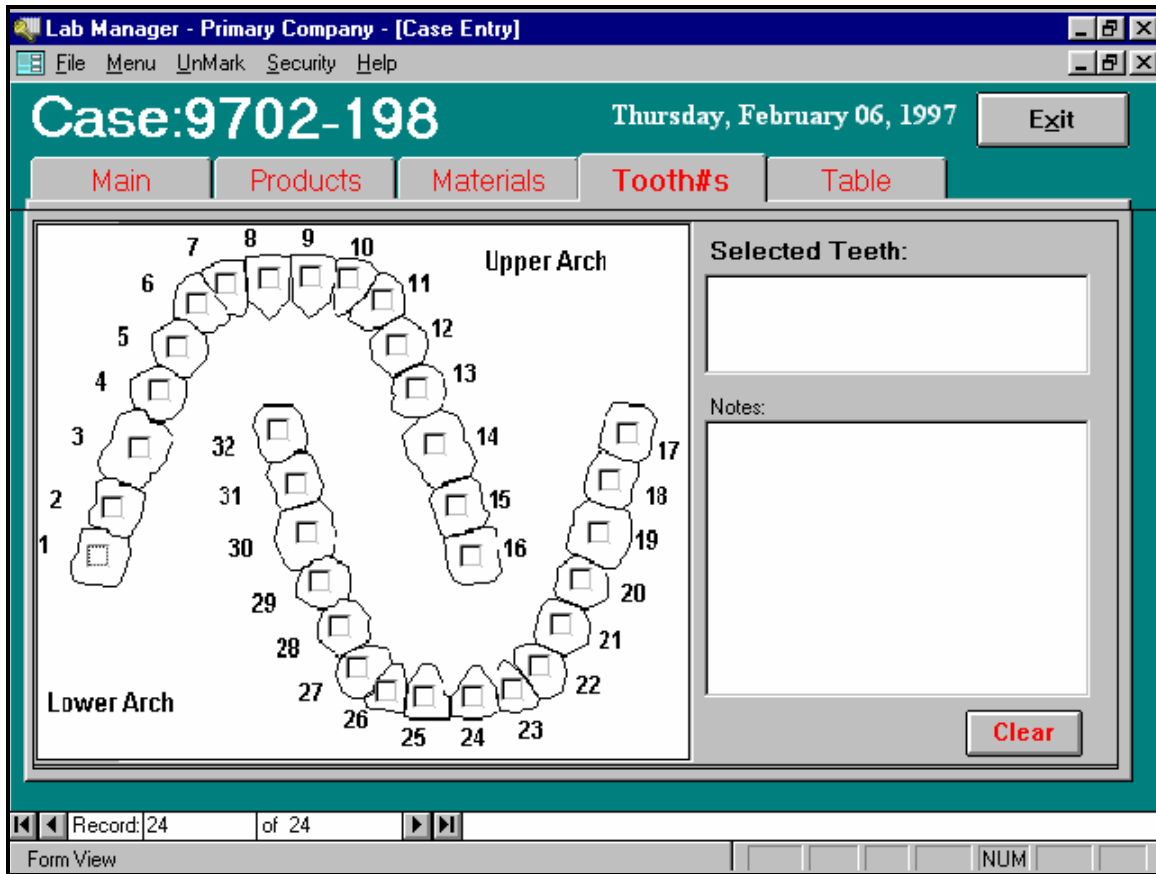
Like products, materials can be entered by material number, description, or by using one of the two list boxes. To select a material, click in either the Material ID column or the

Description column and then click on the drop down list box in that column. Then, click on the material you want in the list.

Define the quantity, modify the Cost or Total if necessary, type in the Tooth numbers if you want, and choose whether or not the material is taxed.

Any number of materials can be defined in this way for the case.

## TOOTH#S



**Selecting Tooth#s:** Tooth numbers can be defined in several places; the product area, the material area, or by using the Tooth#s tab at the top of the case entry screen. To use, click on the Tooth#s tab, then click in the small box located in the center of the tooth you want to select. A selected tooth has a check mark in it.

Room has been provided in the Notes windows to the right of the two arches to type up special notes on the teeth selected. This is typically used to describe special shade information related to specific teeth.

## SEARCH

Lab Manager - Primary Company - [Case Entry]

File Menu UnMark Security Help

Case: 9702-198 Thursday, February 06, 1997 Exit

Main Products Materials Tooth#s Table

CaseNumber	Status	Doctors	Clinics	Price List#	
9610-141	Invoiced	Dr. Tom Mueller, DDS	Dr. Richard Nixon	1	John
9610-142	Invoiced	Dr. Tom Mueller, DDS	Dr. Byron Rutt	1	Davi
9610-149	Statemented	Carolina Dental Cer.	Dr. Jimmy Carter	1	
9610-156	Statemented	Grump, DDS; Dr. Fred	Dr. Richard Nixon	1	
9610-157	Open	Barnes, DDS; Mark J.	Dr. Jimmy Carter	2	cool
9610-158	Statemented	Diamond, DDS; Neil		1	Fran:
9610-159	Open	Dr. Tom Mueller, DDS		1	Stev
9610-161	Statemented	Carolina Dental Cer.		1	ted
9610-162	Open	Diamond, DDS; Neil		1	Stev
9610-163	Open	Diamond, DDS; Neil		1	Fran:
9610-164	Open	Dr. Tom Mueller, DDS		1	Fran:
9610-165	Open	Dr. David R. Koyer, DDS		1	McD
9610-166	Open	Dr. Tom Mueller, DDS		1	Blac
9610-167	Statemented	Barnes, DDS; Mark J.		1	Whit
9610-168	Statemented	Mueller; Tom		1	Smith
9610-169	Statemented	Mueller; Tom		1	
9611-170	Open	Dr. Tom Mueller, DDS		1	Muel
9611-171	Statemented	Reagan, DDS; Ronald S		1	Way

Record: 1 of 33

Record: 24 of 24

Enter a valid status; O=Open C=Closed, H=on Hold, T=Try in, Q=Quote NUM

**Locating a current case:** A current case may be located in several ways.

- Click on the Table tab, scroll through the cases on the screen until you find the one you are looking for, click on it and then click on the Main tab.
- Place the cursor into the field you want to search (such as the patient name) and press the CTRL F (control F) to FIND a case. Type the name of the patient name into the dialog box and click on one of the FIND buttons.
- Click on the word Locate at the top of the screen and fill in the FIND dialog box and click on one of the FIND buttons.

The three methods listed above work in both the Table view and the Main form view.

**Locating an Archived Case:** An archived case, one that is no longer current but in a previous month, can be located by clicking on the Search button in lower right of the Main case entry form.

This form can actually be used to locate both current and archived cases but is used primarily to locate old cases. A case can be located using any field or any combination fields on the form above. To use, select or type in the search information, such as the patient's name, and then click on the Search button. A list of the cases matching your search will be listed in the box below the search criteria.

To locate a case using a date, simply type in the date you want to search for in the appropriate field and click on the Search button. Next to the date fields are three buttons used to further fine tune your search when searching for a date. The button marked with "<" means Less Than. The button marked with ">" means Greater Than, and the button marked "=" means equal to. For example, to locate all cases received before a given received date, type in the received date into the received date field and click on the "<" (less than) button. Then click on the Search button.

So for each of the searches described will only locate current cases. To locate a case that has been archived, click on the Archive box before clicking on the Search button. The Archive button simply tells **Lab Manager 97** to include the archived cases in the search.

## ADDITIONAL CASE RELATED FEATURES

At the bottom of the case entry screen are several buttons providing additional case related features. The following describes each of those buttons.

### HISTORY

The history button can be used to display a complete history of invoices and payments for the account assigned to this case. Use it to see all of the activity for this account.

### DR'S ITEMS

Lab Manager - Primary Company - [Case Entry]

File Menu

Case: 9702-198

Items Received from the Doctor

Exit

Close Cancel

Received: 2/6/97 Schedule: 2/6/97 Finish date:   
 Dr's date: Pan#: Delivered:   
 Ship by date: Shade: Articulator#:   
 Ship by time: Case code: PO#:   
 Archived:  Work ticket:  Post card:  Label:  New case:  Mark

Dr's Items Notes Photo Undo Delete Add New Search

Record: 24 of 24

Form View FLTR NUM

**Items Received from Doctor:** At the bottom of the Main case entry screen is a button labeled “Dr’s Items.” To keep track of the items received from the doctor, click on the Dr’s Items button and then click on each of the items received as listed in the Items Received from the Doctor entry form.

A space for additional notes has been provided in this box.

## NOTES

The screenshot shows a software window titled "Lab Manager - Primary Company - [Case Entry]". The window has a menu bar with "File", "Menu", "UnMark", "Security", and "Help". Below the menu bar is a tab labeled "Case Notes". The main area is divided into several sections: "Notes to be stored with case" (blue header), "Notes to be printed on the Invoice" (red header), "Notes to be printed on the Work Ticket" (green header), and a large "Case Document" area (gray header). There are two buttons at the top right: "Insert Object" and "Exit". At the bottom, there is a red bar with buttons for "Dr's Items", "Notes", "Photo", "Undo", "Delete", "Add New", and "Search". Below the red bar is a status bar showing "Record: 24 of 24" and "Form View".

At the bottom of the Main case entry screen is a button labeled Notes. Clicking on this button displays a special form which allows you to enter several types of notes.

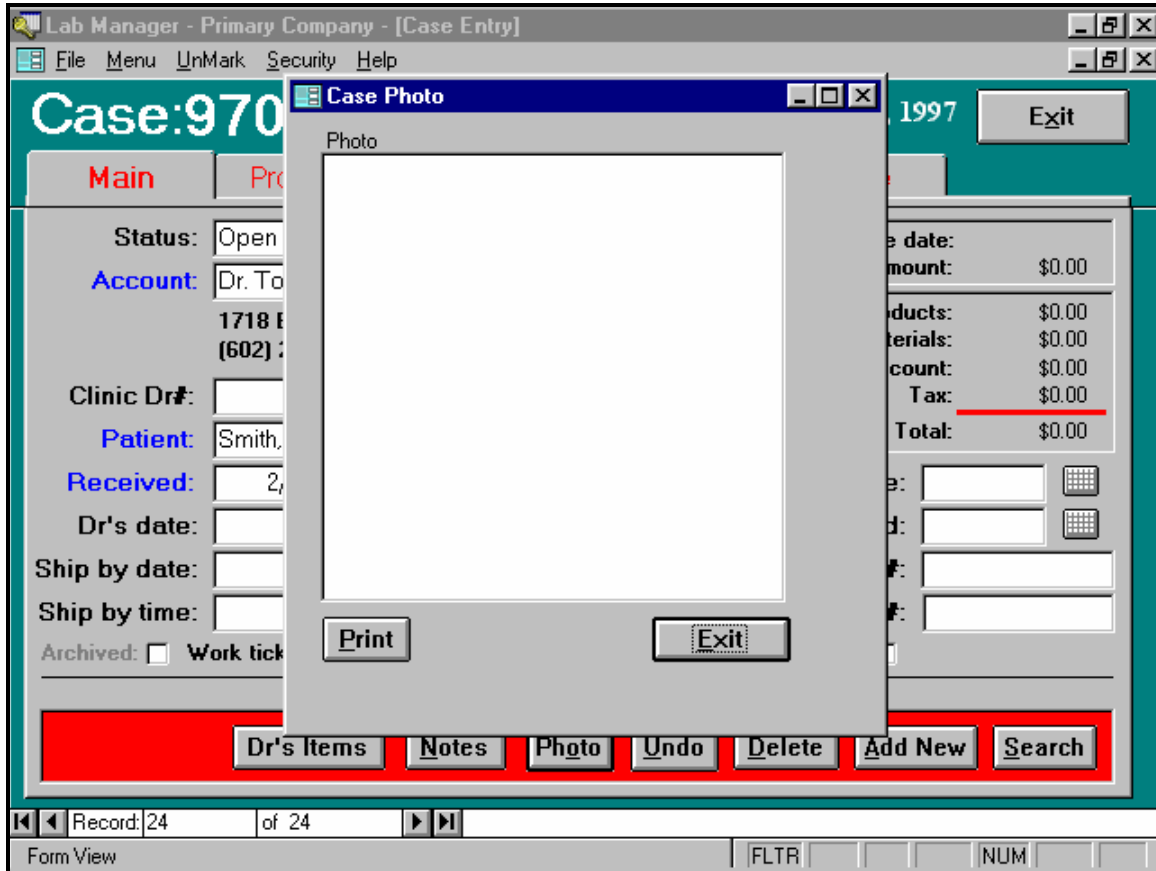
There are four area on this form for keeping notes about the case. The first are labeled “Notes to be stored with case” is for notes that are for your eyes only. These notes are simply stored with the case and can be many pages long.

The area labeled “Notes to be printed on Invoice” are for notes that will be printed on the invoice.

The area labeled “Notes to be printed on the Work Ticket” are for notes that will be printed on the work ticket.

The large windows labeled “Case Document” is for storing a full size letter or document created using Microsoft Word or some other word processor. To use, simply paste your document into the Case Document window.

## PHOTO



If you have the necessary computer hardware and your computer has lots of storage space, then scanned photos or images can be stored with the case using the Case Photo button located at the bottom of the Main case entry form.

## UNDO

The Undo button at the bottom of the case entry screen is used to reverse any recent changes made to the case; undoing anything you just did to the case.

## DELETE

The Delete button at the bottom of the case entry screen is used to delete the case currently visible on the screen.

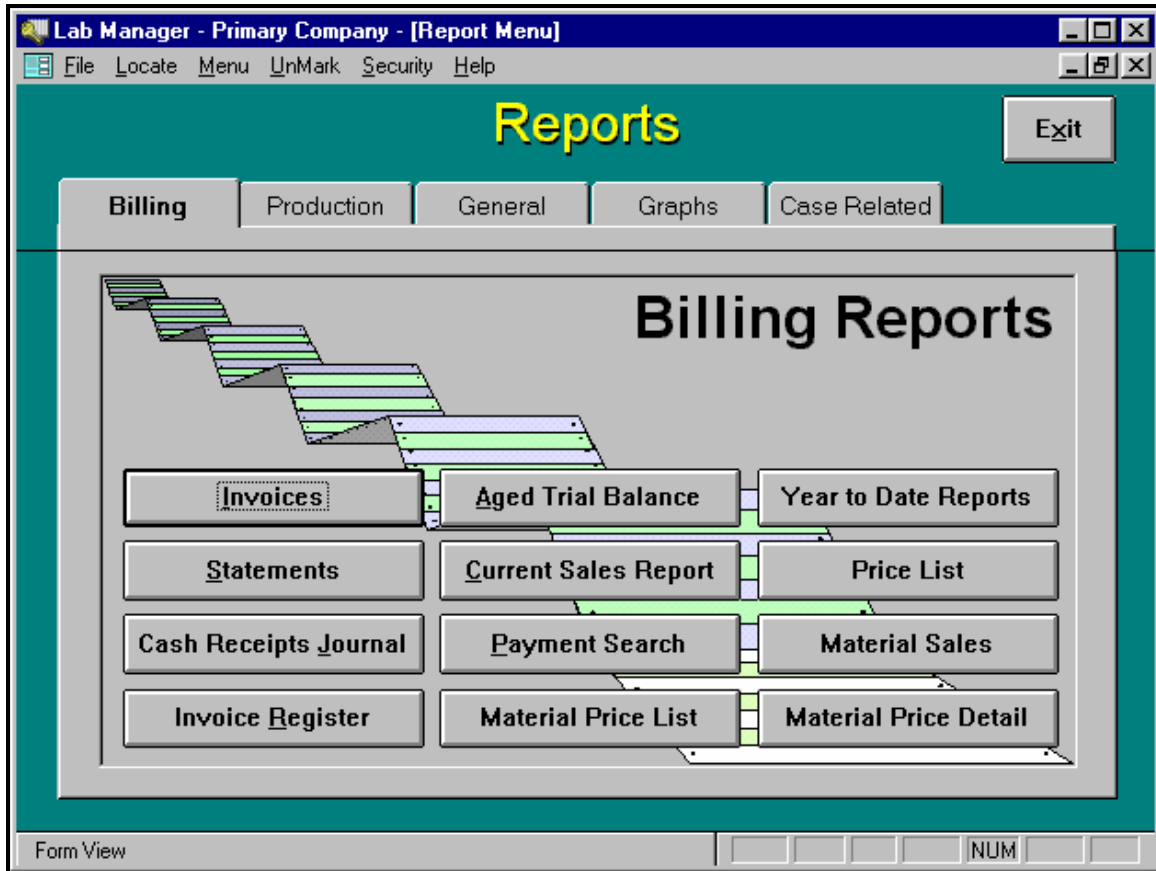
## ADD NEW

This button creates a new case. Each new case has a default status of Open and a receive and schedule date matching today's date.

## STEPS IN LOGGING IN A NEW CASE

1. At the Main Menu, click on the **Case Entry & Update** button.
2. At case entry screen, click on the **New Case** button.
3. Select an account by clicking on the List Box and clicking on doctor name.
4. Press ENTER twice to get to **Patient** and enter patient's name.
5. Optionally, **define Dr's date, Ship by date, Pan#, and Shade.**
6. To add products to the case click on the **Products** tab.
7. Add product by clicking on List Box in the ProductID or Description column.
8. Select product from list box.
9. Press **ENTER** three times to get to the Qty column.
10. Enter the desired quantity if not one.
11. Move cursor to the next line down if you want to enter another product.
12. Repeat steps 7 through 11 until all desired products are listed.
13. Materials can be entered later when the case is finished by clicking on the Materials tab and selecting materials just like the products were selected.
14. Tooth number can be selected by clicking on the Tooth#s tab.
15. Click on the boxes in the desired teeth to select them.
16. Click on the Main tab.
17. Repeat steps 2 through 16 to log in more cases.

# REPORT MENU



The report menu can be found by clicking on the Report Menu tab in the Main Menu. The report menu has five tabs located at the top of the form. Each tab is associated with a group of reports; Billing, Production, General, Graphs, and Case Related.

## BILLING

Under the Billing tab of the report menu are the following billing related reports.

### INVOICES

Clicking on the Invoices button causes **Lab Manager 97** to display another form used to print or preview invoices.

The Print button causes **Lab Manager 97** to print an invoice for all cases with a Closed status. When all the invoices are printed correctly, **Lab Manager 97** changes the status of the case to Invoiced indicating that the case has been invoiced successfully.

The Preview button causes the Invoice(s) to be displayed but not marked invoiced.

Another button resembling a mail slot with an envelope sticking out of it can be used to print mailing labels for the invoiced cases.

The Include Archived button tells Lab Manager to print invoices for cases that have archived in a previous month.

## **STATEMENTS**

Statements are printed just before closing the month and are used to summarize all of the invoices, payments, credits, and discounts for each account. Statements must be printed each month because as each case is stated, **Lab Manager 97** changes it's status to stated and only stated cases will be processed and archived during the end of month closing process.

The Preview button allows you to look at the statements without printing them. If you do use the Preview button to look at the statements, don't forget to print the statements before closing the month.

Use the Print button to print statements for all accounts.

## **CASH RECEIPTS JOURNAL**

This report is used to list payments for the month (MTD), daily, or for a given account. The MTD report should be printed at least at the end of the month to capture all of the payment, credits, and discounts for the month on a printed report.

## **INVOICE REGISTER**

This report lists and totals the invoices in an easy to read report format. This report should be printed at least at the end of the month to capture all of the invoices for the month on a printed report.

Report options include; Between two dates (**Dates**), **MTD** (Month To Date), **Sales**, **Daily**, for a given **Account**, **Archive**.

Between two dates (**Dates**) creates a list of all invoices printed between two user definable dates. **MTD** list all invoices printed so far this month. **Sales** lists all invoices for the month for accounts with a given sales code. **Daily** lists all invoices printed on a given date, usually today's date. **Account** lists all printed invoices for a given account. The **Archive** button, when pressed, causes **Lab Manager 97** to include invoices from previous months.

## **AGED TRIAL BALANCE**

The Ages Trial Balance report provides up to the minute information concerning your accounts receivable status. Information such as current month-to-date charges, 30, 60, 90 days past due charges along with the total account balance for each doctor. Grand totals are also listed at the bottom of the report. This report should be printed at least at the end of the month to capture all of the account balances on paper and can be used to look for mistakes before printing the end of month statements.

This report has the following options; Portrait and Landscape report types, Service charges included, and an option to show only accounts over their credit limit.

## **CURRENT SALES REPORT**

The current sales report is similar to the invoice register, but in account order instead of invoice number order.

## **PAYMENT SEARCH**

This report lists payments based on several search criteria. Using the search criteria, you can create a list of payments for a given account, reference number, payment date, payment type, etc.

To use, select or type in the search criteria you want to search for, like the account name, then, click on the Search button to see all of the payments that matched your search criteria. Click on the Print button to print the list on the printer.

The Clear button is used to start another search; erasing the current search criteria.

## **MATERIAL PRICE LIST**

This report simply shows all of the materials, their code and selling price.

## **YEAR TO DATE REPORTS**

The Year to Date reports are made up of several different reports including one each for Account sales, Product Sales, Product Production, Material Sales, and Material Production. The Sales reports show sales in dollars while the Production reports show sales in units produced. Each report shows sales or production for up to 1 full year broken down by month with bottom line totals.

## **MATERIAL SALES**

There are two Material Sales reports; one for month to date (MTD) sales and one for year to date (YTD) sales.

## **MATERIAL PRICE DETAIL**

This report is similar to the Material Price List but adds Cost and Markup figures to the report.

## **PRODUCTION REPORTS**

Under the Production tab of the report menu are the following production related reports.

### **ACCOUNT ANALYSIS**

This report lists all of the accounts sorted by either **month to date** sales or **year to date** sales placing the account who did the most business with you at the top of the report and the one with the lowest sales at the bottom of the report.

### **DEPARTMENT ANALYSIS**

There are two reports in this section; one for products and the other for materials. Both reports summarize production in units produced or sold along with dollar sales for each item and grouped by department.

### **MATERIAL USAGE**

The material usage report lists each material with its starting inventory quantity, quantity sold for the month, the cost of the sold material, sales, profit, current inventory level, and inventory value.

### **LAB STATUS REPORT**

This report summarizes production, sales, and receivables all on one easy to read page. Under Case Summary, **Lab Manager 97** shows how many cases and units were received today, due today, need to be shipped today, are invoiced, open, closed, on hold, etc.

The lower left portion of the report, under Sales, Payments, and Credits, **Lab Manager 97** shows your beginning accounts receivable balance, followed by MTD (month to date) sales, adjustments, credits, credit card payments, discounts, payments, refunded tax, service charges, and the ending or present balance.

Under Receivables, shows how much is owed to you in the current, 30, 60, and 90 day fields along with the number of doctors that fall into each of those categories.

## **DELIVERY REPORT**

The delivery report is designed to list all of the cases that must be delivered on a given date, between two dates, for a given account, department, or route. The report can be sorted by ship by date, doctor date, or finished date.

## **SALES BY CLINIC DR.**

This report simply summarizes sales broken down by the individual clinic doctor instead of the main billing account.

## **WORK TICKET**

The work ticket is designed to be printed and attached to the case pan so that the technician will know what work needs to be done and when it needs to be finished. **Lab Manager 97** Billing does not list individual production steps or their due dates on the work ticket; this function is added with the **Lab Manager 97** Scheduling module.

The date at the top of the work ticket it's color are defined in the company and system information area of **Lab Manager 97**.

## **DAILY DELIVERY LIST**

Unlike the delivery report, this list is designed to be given to a delivery person and shows the accounts address, phone number, and route, along with a list of the cases to be delivered to each account and a place on the form for a person to sign on that the case was received.

## **MATERIAL RE-ORDER LIST**

This report lists all of the materials that need to be re-ordered, based on the quantity in stock and the re-order point defined in **Lab Manager 97**. Also shown on this report is the vendor information, cost of each material, and the total of the order summarized by vendor.

## **GENERAL REPORT MENU**

The third tab at the top of the report menu is used to select simple lists of accounts, products, materials, etc. For example, to print a simple list of products, click on the Products button, then click on the Print button.

## GRAPHS REPORT MENU

This is the fourth tab at the top of the Report menu and is used to print graphs of sales and production for accounts, products, materials, and departments. For example, to print a graph of product production, click on the Product Graphs button, then choose a product from the product drop down list, and then click on print.

## CASE RELATED REPORT MENU

The fifth tab at the top of the Report Menu can be used to select one of several case related reports. The following describes each of those reports.

### CASE/PAYMENT

This button actually represent four reports.

1. Payments with matching cases
2. Payments without matching cases
3. Cases with matching payments
4. Cases without matching payments

Even though **Lab Manager 97** employs a “Balance Forward” accounts receivable system which applies payments to the oldest balances first, it does allow you to note what payments where intended for a given invoice. To use this feature, you will need to enter the invoice number into the Invoice number column in the payment area. This can be accomplished by using the drop down list to select the case by patient name.

The above four reports can be used to list cases or payments in a number of different combinations.

### CASE SEARCH

This is a very useful report that can list cases in thousands of different ways. By defining one or more search criteria such as status or account, or patient (to name just a few), it is easy to list all cases with matching information. The following is a step by step procedure for printing a report.

**Step 1:** Define one or more search criteria by selecting a status or defining a patient name. When searching for a date, you can use one of three options to find a date than exactly matches, one that is less than the given date, or one that is greater than the given date. The default is to find dates with an exact match. To find dates that are earlier than the given date, use the button with the “<” symbol on it. To find dates that are later than the given date, use the button with the “>” symbol on it.

**Step 2:** Click on the Search button. **Lab Manager 97** will then display the cases it found in the window at the bottom of the screen. The Clear button can be used to start a different search.

**Step 3:** Click on the Reports button to display another set of options including the sort order. The list of matching cases can be sorted by case number, ship-by date, invoice date, receive date, Dr. Date, finish date, patient name, or account name.

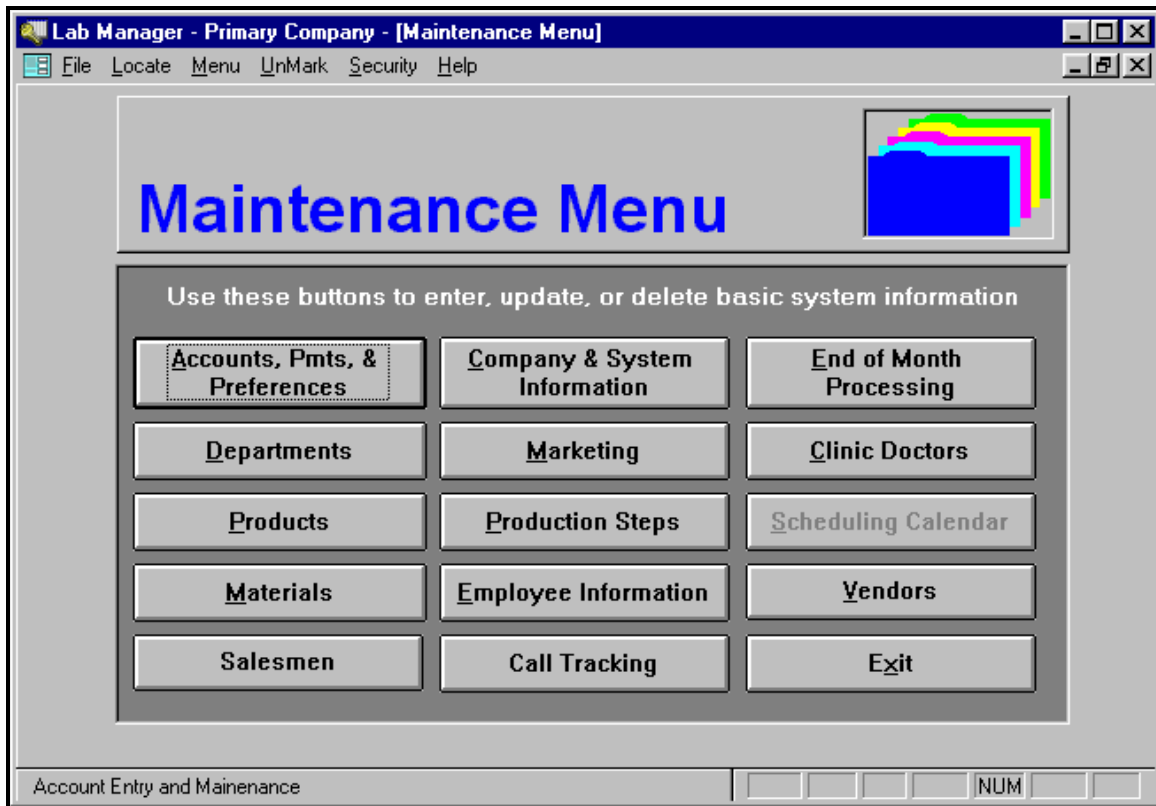
**Step 4:** Click on the button indicating the sort order you desire.

**Step 5:** Click on the Print or Preview button to print or review the report.

## **CASES AT A GLANCE**

This report is another way of looking at the cases in the system, showing the case number, account name, patient, Dr's date, Finish date, Ship by date, and the number of units for each case.

# MAINTENANCE MENU



The Maintenance Menu is the place to go when ever you want to add new accounts, products, materials, employees, etc. or make changes to existing ones. The following describes each of the buttons shown in the menu.

## ACCOUNTS, PMTS, & PREFERENCES

Lab Manager - Primary Company - [Account Information]

File Locate Menu UnMark Security Help

# Accounts

 Total payments: 

Page 1 Page 2 Payments Preferences Table

ID	Title	First Name	Last Name	Degree	Mark	<input type="checkbox"/>			
1	Dr.			DDS	Late 30+:	\$0.00			
Name:						Late 60+:	\$0.00		
Line 1:						Late 90+:	\$0.00		
Line 2:						Last paid:			
City:						Last stmt:	\$0.00		
Phone:						Code:	YTD:	\$0.00	
Price List#:						S/C rate:	0.00%	Last Year:	\$0.00
Tax %:						0.00%	Start S/C after:	Disc Rate:	0.00%
Crdt limit:						\$0.00	E-Mail:		

Graphs Print Label Sheet Delete Ledger New Search History

Record: 1 of 1

Enter the account's title. Example: Dr, Mr., Mrs, Miss, Ms. etc.

Page one of this screen is used to define an accounts name, address, phone, and some billing information. Page two is used to define additional, yet less used, account information. Payments can be entered for this account by clicking on the payment tab and special account preferences can be defined using the preference tab. The table tab can be used to find an account. The following describes each of the fields on each of the above tabs in more detail along with the buttons at the bottom of the screen.

### GRAPHS

Clicking on this button displays three graphs. The first compares sales for this year to last year, for this account. The second graph compares sales of this account to all of the other accounts together and the third graph shows a twelve month history of sales for this account.

### PRINT

Prints information on this account.

## **LABEL**

Prints a mailing label for this account.

## **SHEET**

Starts your spread sheet program to analyze sales data.

## **DELETE**

Use this button to delete this account along with it's related data.

## **LEDGER**

Displays a ledger showing financial information on this account including starting balance, current charges, past due charges, payments, and total due as of this moment. This function is great when a account calls up and wants to know his current balance.

## **NEW**

Use this button when you want to add a new account to **Lab Manager 97**.

## **SEARCH**

This button can be used to locate an account, print mailing labels, or print a list of accounts.

## **HISTORY**

Displays a complete history for invoices and payments for this account.

## **PAGE 1**

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Title:** Optional account title such as Dr., Mr., Mrs, Miss, Ms..

**First Name:** The accounts first name. Leave blank if the account uses a business name instead of a persons name.

**Last Name:** The accounts last name. If it is a business name, type all (for at least the first portion) of the name here.

**Degree:** The accounts degree, if any, such as DDS.

**Name:** This field is automatically filled out as soon as you press enter in the Degree field. The information in this field can be changed if you like.

**Line 1 and Line 2:** These are address lines. Start with Line 1 and use Line 2 only if you need more space for the address.

**City, State, and Zip:** These three fields are to the right of the City field name. Be sure to place the city into the first field, the state abbreviation into the second field, and the zip code into the third field.

**Phone:** The accounts telephone number.

**Code:** A user definable sales code used to group this account with other accounts in the same are, county, city, or tax jurisdiction. For example, if you charge tax in your area, you might want to assign each account a sales code that defines grouping that account with other accounts of the same sales code; all accounts in Orange county might be given a sales code of Orange, all accounts in Kern county might be given a sales code of Kern, and so on. By doing this, **Lab Manager 97** can produce a tax report showing the amount of tax collected in those areas.

**Price list #:** Assigns this account to one of the twelve possible price lists. Each account must be assigned to only one price list. If you only use one price list then assign this account to price list number 1.

**Tax%:** Local tax rate. The tax rate can be typed in two different ways. For example, if you charge 6.5% tax in your area, you can type it in as .065 (with out the % symbol) or 6.5% (with the % symbol).

**Crdt Limit:** Optional credit limit. If defined, **Lab Manager 97** can use it to list accounts that have exceeded their credit limit.

**S/C rate:** Optional service charge rate defined in one of two ways. For example, if you charge a 1.5% per month service charge on past due balances, type it in as .015 (with out the % symbol) or 1.5% (with the % symbol).

**Start S/C after:** Start the service charges after how many days? Allowable answers include 30, 60, or 90 days.

**E-Mail:** Optional e-mail (electronic mail) address for this account.

**Late 30+:** This field normally contains the account's 30 day past due balance, but when starting up the system for the first time, the easiest way to enter the account's starting balance is to place it here. When setting up **Lab Manager 97** for the first time, place the bottom line total from last months statement; the total amount due. This becomes the account's starting balance.

**Late 60+:** This field contains the account's 60 day past due balance. When setting up **Lab Manager 97** for the first time, leave this field blank.

**Late 90+:** This field contains the account's 90 day past due balance. When setting up **Lab Manager 97** for the first time, leave this field blank.

**Last paid:** This field is updated automatically each time a payment is entered. There is no reason to type anything into this field.

**Last Stmt:** Last Statement balance. This field is updated automatically each time the month is closed. There is no reason to type anything into this field.

**YTD:** Year to Date sales for this account. This field is updated automatically each time the month is closed. There is no reason to type anything into this field.

**Last Year:** Last years sales. This field is updated automatically each time the month is closed. There is no reason to type anything into this field.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more accounts and then print a label or a report showing only the accounts that have been marked.

## PAGE 2

Lab Manager - Primary Company - [Account Information]

File Locate Menu UnMark Security Help

Accounts [dropdown] Total payments: [button]

Page 1 Page 2 Payments Preferences Table

Fax Number: [text box] Shipping Address

Birthday: [text box] [calendar icon] Address Line 1: [text box]

Start Date: [text box] [calendar icon] Address Line 2: [text box]

Reg #: [text box] Clinic:  City State Zip: [text box]

Reg Date: [text box] [calendar icon] COD:  Statement Sent: [US Mail dropdown]

Commission: [text box] QC Sheet:  Use Shipping Address on Invoice:

Shipping method: [text box] On Hold:  Use Shipping Address on Statement:

# of days: [0] Delivery hrs: [text box]

Security #: [0] Route: [text box] UPS zone: [text box]

Definable: [text box] Contact: [text box]

Salesperson: [text box] [dropdown icon] Notes: [text area]

Special codes: [text box]

Record: 1 of 1

Form View

NUM

**Fax Number:** Optional fax number for this account.

**Birthday:** Optional birthday date. Can be used to create mailing labels, post cards, or lists of accounts with a birthday on a given date.

**Start Date:** Optional. The date the account starting doing business with you.

**Reg #:** Optional. Registration number required in some dates. If your state does not require that you be registered with the state then leave this field blank.

**Reg. Date:** Optional registration date. If your state does not require that you be registered with the state then leave this field blank.

**Commission:** Optional commission rate paid to a salesperson on all sales for this account..

**Shipping method:** Optional. Preferred shipping method for this account.

**# of days:** Optional. The number of days it takes to deliver or ship cases back to this account after the case is finished.

**Security#:** Future feature not used at this time.

**Definable:** Optional user definable field. This field can be used to place information that **Lab Manager 97** doesn't have a regular place for.

**Salesmen:** Optional. The name of the sales person responsible for this account.

**Special Codes:** Optional user definable field. This field can be used to place information that **Lab Manager 97** doesn't have a regular place for.

**Shipping Address Line 1:** Optional. First line of shipping address. Only used if the shipping address is different than the mailing address.

**Shipping Address Line 2:** Optional. Second line of shipping address. Only used if the shipping address is different than the mailing address.

**City State Zip:** Optional. City, state, and zip code line of shipping address. Only used if the shipping address is different than the mailing address.

**Statement Sent:** The method in which the statement is sent. The choices include; US Mail, E-Mail, Fax, and Other.

**Use Shipping Address on Invoice:** If this check box is checked, then the shipping address will be printed on the invoice instead of the mailing address.

**Use Shipping Address on Statement:** If this check box is checked, then the shipping address will be printed on the statement instead of the mailing address.

**Delivery hrs:** Optional delivery hours. Example: Mon-Fri 8-11:30, 1-3

**Route:** Used to define the delivery route this account is on. By defining a set of delivery routes and giving each a code, it is possible to generate a delivery list for your delivery personnel.

**UPS zone:** Optional UPS shipping zone for this account.

**Contact:** The name of the contact person at this office.

**Notes:** User definable notes on this account. Pages of notes can be typed into this field, however, only about the first 90 characters will show up at the bottom of the case entry screen. This field is not to be confused with doctor preferences which can be defined by clicking on the preferences tab at the top of the screen.

**Clinic check box:** Click on the Clinic check box if this account is a clinic or group practice with multiple doctors in it.

**COD check box:** Click here if this account is on a COD basis. If checked, **Lab Manager 97** will remind you when an account is on a COD basis when you enter a case for that account.

**QC Sheet:** Check here if this account is to receive a Quality Control sheet with the invoice when you are using an invoice form that includes a quality control portion.

**On Hold:** Check here to place this account ON HOLD making the account inactive.

## PAYMENTS

The screenshot shows a software window titled "Lab Manager - Primary Company - [Account Information]". The window has a menu bar with "File", "Locate", "Menu", "UnMark", "Security", and "Help". Below the menu bar is a teal header area with the word "Accounts" in large white font, a dropdown menu, and the text "Total payments:". To the right of the header is an "Exit" button. Below the header are five tabs: "Page 1", "Page 2", "Payments" (which is selected), "Preferences", and "Table". The main area of the window is a table with the following columns: "Amount", "Ref#", "Date", "Type", "ClinicDR", and "Notes". The table contains one row with the date "6/24/97" and the type "Payment". At the bottom of the window, there is a status bar with "Form View" and a "NUM" field.

Amount	Ref#	Date	Type	ClinicDR	Notes
		6/24/97	Payment		

Payments are entered for an account by clicking on the Payments tab at the top of the screen. The fields in the payments window include; amount, Ref#, date, payment type, clinic Dr, notes, Invoice number, and Mark. Each of these fields are described below.

**Amount:** This is where the amount of the payment, credit, discount, or adjustment is entered.

**Ref#:** Optional Reference number, normally used for the check number. When the payment is made on a credit card, some people type M/C or VISA into this field to identify the type of credit card that was used.

**Date:** The date the payment was made. The default date is always today's date.

**Type:** The payment types include; Payment, Credit, Discount, Adjustment, Refunded Tax, and Credit Card. The default is Payment.

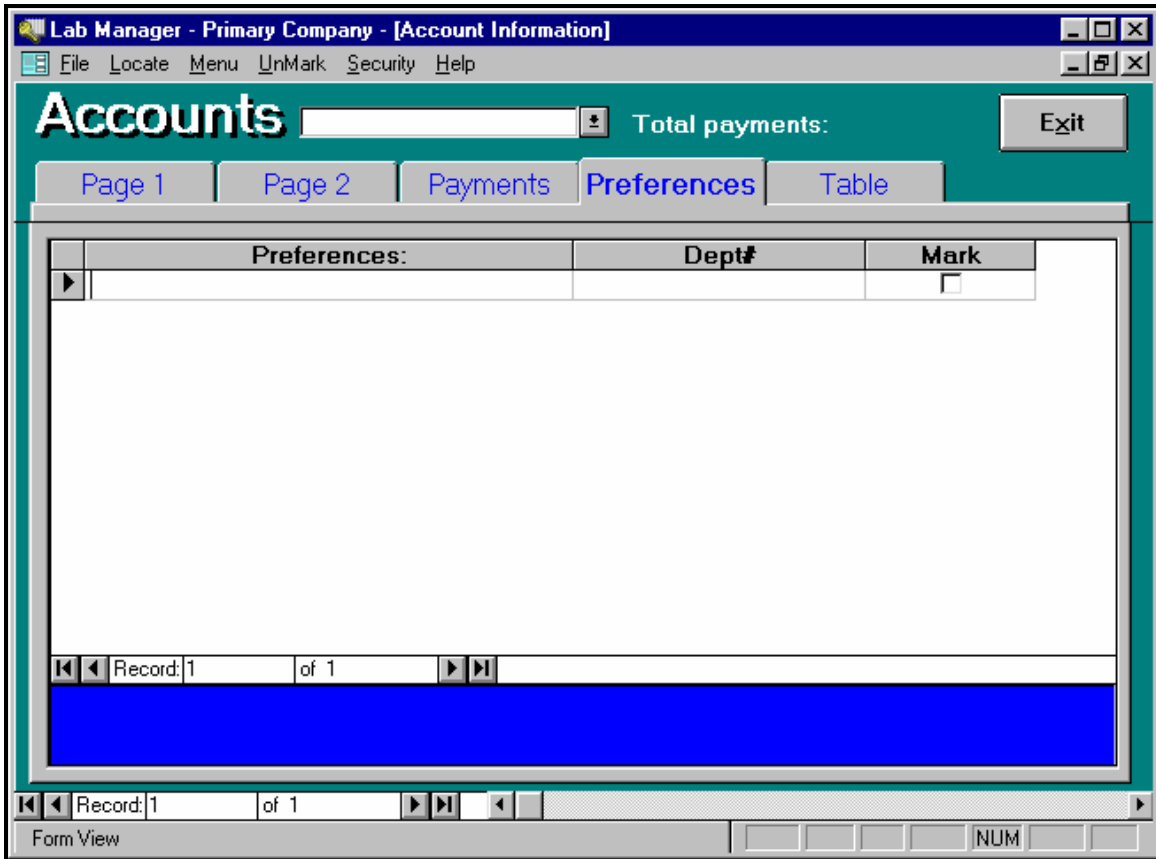
**ClinicDr:** Optional. Used to define the clinic doctor within a clinic that made the payment. Most of the time, payments come from the main office, not an individual in the office, therefor this field is usually left blank.

**Notes:** Optional notes can be entered here describing the reason for a credit, discount, or adjustment.

**Invoice number:** Optional. Can be used to remind you what case this payment was to be applied to. Remember, **Lab Manager 97** is a balance forward billing system and does not actually apply a payment to a given invoice. Instead, all payments are applied to the oldest balance first. This field, however, can be used to help track what payments have been received when dealing with accounts who want to send in payments for a given invoice.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more accounts and then print a label or a report showing only the payments that have been marked.

## PREFERENCES



The screenshot shows the 'Lab Manager - Primary Company - [Account Information]' window. The title bar includes 'File', 'Locate', 'Menu', 'UnMark', 'Security', and 'Help'. The main window has a teal header with the word 'Accounts' in large white letters. Below the header, there are tabs for 'Page 1', 'Page 2', 'Payments', 'Preferences', and 'Table'. The 'Preferences' tab is active, displaying a table with the following structure:

Preferences:	Dept#	Mark
		<input type="checkbox"/>

At the bottom of the window, there is a status bar showing 'Record: 1 of 1' and 'Form View'.

Preferences refer to those special instructions from an account. You may have as many preferences as you like associated with each account. Each preference can be tied to one of your departments so that a crown and bridge preference can be tied to the crown and bride department. Tying a preference to a department causes that preference to only so

up on work tickets that have a product in that department. A preference with no department will appear on all work tickets.

**Preferences:** A doctor's preference or standing order.

**Dept#:** Use this field to assign this preference to a department.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more accounts and then print a label or a report showing only the payments that have been marked.

## **TABLE**

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

## DEPARTMENTS

Lab Manager - Primary Company - [Department Information]

File Locate Menu UnMark Security Help

### Departments

Exit

Form Table

Dept Description:  ID:  Mark

Quality Control Document for Work Ticket

Quality Control Document for Invoice

Sales Graph Print Delete Undo Add New Search

Record: 1 of 1

Enter name of department (Example: Crown & Bridge, Denture, or Orthodontic.) NUM

Departments include the major types of work that your laboratory performs. Common departments include Crown & Bridge, Denture, Orthodontic. A crown & bridge laboratory may only have one department called Crown & bridge, or it may have two or more departments such as; Ceramic and Metal. You can define as many departments as you like, but is typically limited to 10 or less.

### SALES GRAPH

Click on this button to see a pie graph of sales by department.

### PRINT

Click on this button to print the information on this screen.

### DELETE

Click on this button to completely delete this department along with it's quality control sheets.

## UNDO

Clicking on this button will undo your last changes to the information on this screen.

## ADD NEW

Use this button to add a new department.

## SEARCH

Use this button to search for a department.

## FORM

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Dept Description:** Place the name of a department here.

**Quality Control Document for Work Ticket:** This is where a quality control document can be created for the work ticket. Type in the questions you want to appear on the work ticket. A new line can be started by pressing CTRL and ENTER together; pressing ENTER alone causes **Lab Manager 97** to go to the next field.

**Quality Control Document for Invoice:** This is where a quality control document can be created for the invoice. Type in the questions you want to appear on the invoice. A new line can be started by pressing CTRL and ENTER together; pressing ENTER alone causes **Lab Manager 97** to go to the next field.

## TABLE

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

## PRODUCTS

The screenshot shows the 'Products' window in Lab Manager. The window title is 'Lab Manager - Primary Company - [Product Information]'. The menu bar includes 'File', 'Locate', 'Menu', 'UnMark', 'Security', and 'Help'. The main area is titled 'Products' and has an 'Exit' button. Below the title are tabs for 'Page 1', 'Page 2', 'Steps', and 'Table'. The form contains several input fields: 'Description:', 'Code:', 'ID:', 'Class:', 'Dept#:', 'Relative:', and 'Definable:'. There are also checkboxes for 'Include on printed price list', 'Discountable', 'Invisible', 'Taxable', and 'Count'. A 'Price Lists' section contains 12 input fields labeled 'Price#1' through 'Price#12'. At the bottom of the form are buttons for 'Graph', 'Print', 'Delete', 'Un-Do', 'Add New', and 'Search'. The status bar at the bottom shows 'Record: 1 of 1' and a description of the product: 'Description of product (Example: Full Gold Crown)'. There are also some empty input fields and a 'NUM' label.

In **Lab Manager 97**, invoices may contain both products and materials. Products are the things that the lab makes, the labor items such as crowns, bridges, dentures, etc. Materials, defined in the material area, include those billable materials such as gold, precious metals, teeth, and attachments.

This area is used to define the products. Each product can have up to 12 different price lists. If you charge every account the same amount for a given product, then you are only using one price list and will define your selling price in the Price#1 field. If you have different prices for a given product, then you will define each of the different selling prices in the Price#1 through Price#12 fields. Price#1 corresponds to the price from your number one price list, Price#2 corresponds to the price from your number two price list, and so on.

## SALES GRAPH

Click on this button to see a three graphs showing production and sales information on this product.

## PRINT

Click on this button to print the information on this screen.

## **DELETE**

Click on this button to completely delete this product.

## **UNDO**

Clicking on this button will undo your last changes to the information on this screen.

## **ADD NEW**

Use this button to add a new product.

## **SEARCH**

Use this button to search for a product.

## **PAGE 1**

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Description:** Complete description of the product such as “Porcelain to Gold Crown.” The description should be entered exactly as you want it to appear on your invoices. Remember, materials are not defined in this area but are instead defined in the material area of **Lab Manager 97**.

**Code:** A short abbreviation for the product description. For example, PFM for Porcelain fused to Metal.

**Class:** Optional number between 0 and 32767 used to classify or group products together for reporting purposes. For example; a class number of “1” could be assigned to one or more products that you wish to track. Using one of the Case Related Reports, a report can be printed showing all of the cases currently using a product with a given class number.

**Dept#:** Using the drop down list box, select the department that this product belongs. If the product belongs in two or more department, then define separate product with the same description but with different department numbers.

**Relative:** This feature is not yet operational.

**Definable:** Optional user definable information.

**Include on printed price list:** This check box, when checked, tells **Lab Manager 97** to include this product on the Price List report.

**Discountable:** When checked, this product can be automatically discounted by the percentage defined in the account file.

**Invisible:** A product with a check mark in this field will not appear on the invoice and will not have a billing value. This product can be used in a case to help keep track of products and/or services without billing the account for them.

**Taxable:** A product with a check mark in this field is allowed to be taxed, if the account is normally taxed. This field has no affect on accounts with a zero tax rate.

**Count:** **Lab Manager 97** will only count products, on certain reports, if this field is checked. Unchecked, this product will not be included in certain product totals.

**Price#1 through Price#12:** These fields define the selling price for this product. Price#1 corresponds to price list number one, Price#2 corresponds to price list number two, and so on. If you only have one price list, place the selling price in Price#1.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more products and then print a label or a report showing only the products that have been marked.

## PAGE 2

The screenshot shows a window titled "Lab Manager - Primary Company - [Product Information]". The window has a menu bar with "File", "Locate", "Menu", "UnMark", "Security", and "Help". Below the menu bar is a teal header with the word "Products" in large white font and an "Exit" button. Underneath the header are four tabs: "Page 1", "Page 2" (which is selected), "Steps", and "Table". The main content area is divided into two sections. On the left, there are input fields for "Last Year:" (value 0.00) and "This Year:" (value 0.00). Below these is a section titled "Total Units:" followed by a "Unit Count History" table. The table has two columns of months: Jan, Feb, Mar, Apr, May, Jun in the first column and Jul, Aug, Sep, Oct, Nov, Dec in the second column. Each month has an input field with the value 0.00. On the right side of the main content area is a large empty rectangular box labeled "Product Photo". At the bottom of the window is a status bar with navigation icons, the text "Record: 1 of 1", and a "NUM" field.

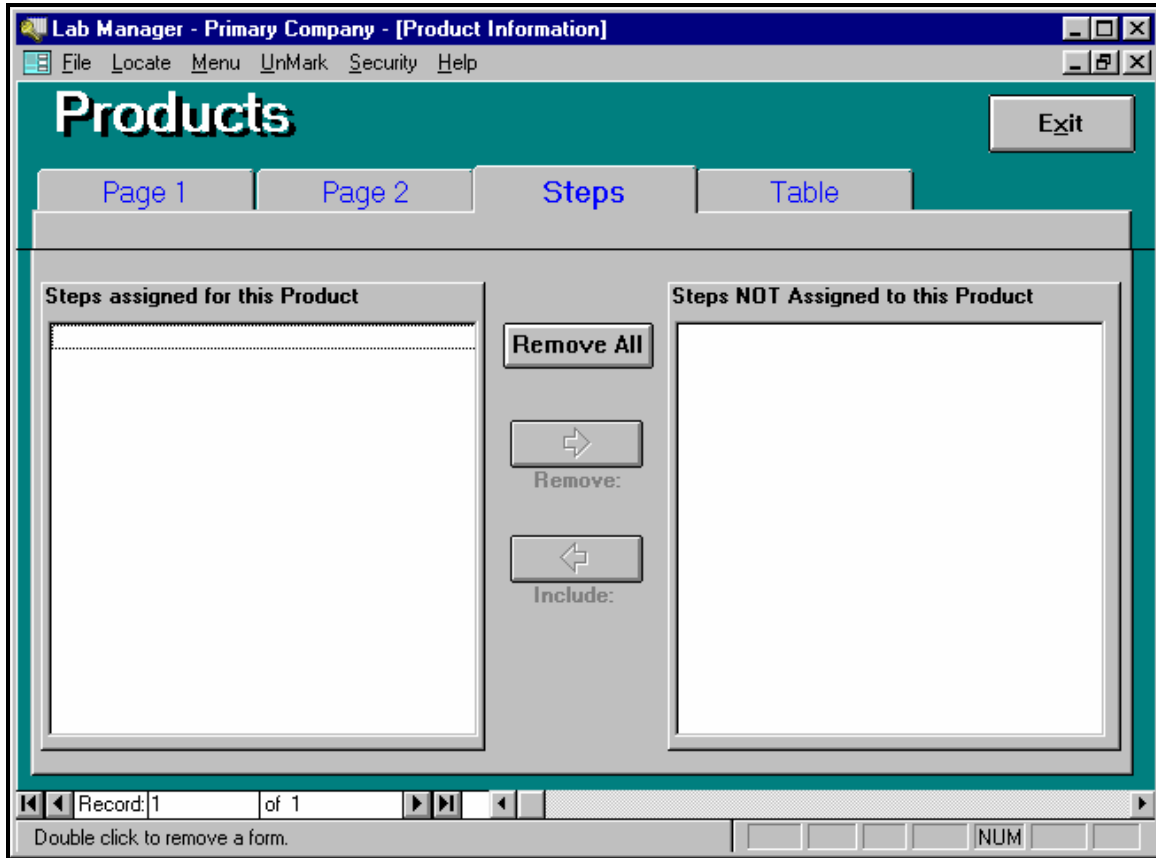
**Last Year:** Last year's sales of this product.

**This year:** This year's sales of this product so far. **Lab Manager 97** will maintain this information automatically once it is started.

**Jan through Dec:** The number of units of this product produced during the months of January through December. **Lab Manager 97** automatically maintains this information every month.

**Product Photo:** A scanned image of the product can be stored here by simply pasting the image into this box using Window's standard copy and paste functions. CTRL C will copy an image for the highlighted field and CTRL V will paste that image into a highlighted field.

## STEPS



The steps tab is used to assign production steps to this product. Steps must be defined in the Product Step area before they can be assigned to a product. Assigning steps to a product, once the steps have been set up, is as simple as clicking on the desired step in the right box and then clicking on the Include button. The left box will contain the list of steps assigned to this product.

To remove a step from this product, click on the step in the left box and then click on the Remove button.

## TABLE

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of

the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

# MATERIALS

Lab Manager - Primary Company - [Material Information]

File Locate Menu UnMark Security Help

## Materials

Selling Price:

Form Table

Description:  Updated:  Mark

Code:  ID:  YTD sold:

Units:   YTD cost:

Cost \$:  per Safety Info:

In stock:  User Definable:

Markup %:  Discountable

Dept#:   Taxable

Vendor #:   Invisible

Re-order at:  Hazardous

Re-order qty:  Material Photo

Record: 1 of 1

Enter the description of a billable material such as GOLD, TEETH, or ATTACHME  NUM

This function is used to enter new or edit existing "billable" material information such as the gold, teeth, and attachments used in the various products produced by your laboratory.

## GRAPH

Click on this button to see a three graphs showing production and sales information on this material.

## PRINT

Click on this button to print the information on this screen.

## DELETE

Click on this button to completely delete this material.

## UNDO

Clicking on this button will undo your last changes to the information on this screen.

## ADD NEW

Use this button to add a new material.

## SEARCH

Use this button to search for a material.

## FORM

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Description:** Full description of the billable material.

**Code:** This is a short abbreviated description of the material. This code is used in many places in the system where there is not enough room for the complete description. Be sure to use a code that is descriptive enough for you to recognize later.

**Units:** Defines the units in which the material is described. For example, gold is often described in units of Pennyweight; therefore, the UNITS should be defined as "PW" for pennyweight. Use the drop down list to select the units desired.

**Cost \$:** The COST field defines your cost for the materials NOT the doctor's price. Make sure the cost is in the units defined above.

**In stock:** This field is used to define the total number of units, of this material, are in stock. If the material is a metal, then this field should contain the total weight in stock. This value is automatically reduced by the amount used (according to the invoices) at the time "end of month processing" is done each month. This value is very useful for determining how much "inventory" you have.

To add more material to the "In Stock" field, when additional materials are purchased, simply click on the Increase Stock button. The computer will prompt you for the quantity received. Type in the received quantity, press **ENTER**, and the computer will add this quantity to the quantity in stock.

**Markup %:** This field is used to tell the computer how much to mark up or increase the COST for resale. For example, a markup of 100 will mark up the cost 100 percent to produce a selling price of twice that of the cost. After defining the markup value, the selling price will be displayed at the top of the screen. The mark up value can be entered

in one of two ways; as a fraction or as a percentage. For example, to enter a mark up of 50 percent, you can enter it as “.05” or as “50%” (do not use the quotes).

**Re-Order At:** Used to define the level at which the computer is to re-order more of the material. For example, if the re-order point is 10 pennyweight, the computer will automatically include this material on the RE-ORDER LIST as soon as the QUANTITY IN STOCK reaches or goes below the RE-ORDER point. See the "Material Usage Report" for more information on this feature.

**Re-Order Qty:** Suggested re-order quantity of the material when the QUANTITY IN STOCK reaches or goes below the RE-ORDER POINT. For example, to maintain a quantity of gold of at least 10 pennyweight, you might define the RE-ORDER POINT at 10 pennyweight and the RE-ORDER QTY at 5 pennyweight. In this way, the computer will tell you on the "Re-order list" to order 5 pennyweight of this material as soon as the quantity in stock reaches or goes below the re-order point.

**Dept#:** Use the drop down list to select the department this materials belongs in. If this material belongs in more than one department, then you must define additional materials with the same description but with a different department.

**Vendor #:** Account number of the vendor that supplies this material. This number corresponds to the vendor name and address as defined in the "vendor information" section of the program.

**Updated:** Date this material was last updated. This date is automatically updated each time materials are added to the "In Stock" field.

**YTD Sold:** This field is maintained automatically and contains the amount of this material sold so far this year.

**YTD Cost:** This field is maintained automatically and contains the cost of this material sold so far this year.

**Safety Information:** This field can be used to define special safety information the doctor should know when this material is used in the patient's mouth. This information is printed on the invoice automatically.

**Discountable:** When checked, this product can be automatically discounted by the percentage defined in the account file.

**Invisible:** A material with a check mark in this field will not appear on the invoice and will not have a billing value. This material can be used in a case to help keep track of how much of this material was used without billing the account for it.

**Taxable:** A material with a check mark in this field is allowed to be taxed, if the account is normally taxed. This field has no affect on accounts with a zero tax rate.

**Hazardous:** Check this box if the material is hazardous.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

**Material Photo:** A scanned image of the material can be stored here by simply pasting the image into this box using Window's standard copy and paste functions. CTRL C will copy an image for the highlighted field and CTRL V will paste that image into a highlighted field.

## **TABLE**

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

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## SALESMEN

Lab Manager - Primary Company - [Salesman]

File Locate Menu UnMark Security Help

Salesman Exit

Form Table

Name: [ ] ID: [ ]

Address: [ ]

City, State Zip: [ ]

Phone: [ ]

S/S: [ ] Mark

Area: [ ]

Commission Rate: [ ] Code: [ ]

SalesmanPhoto: [ ]

Notes: [ ]

Print Delete Un-Do [ ] Add New Search

Record: 1 of 1

Enter the last name of this person. NUM

This area of Lab Manager is used to define basic information on your sales people.

### PRINT

Click on this button to print the information on this screen.

### DELETE

Click on this button to completely delete this Salesman.

### UNDO

Clicking on this button will undo your last changes to the information on this screen.

### DIAL

Click on this button to have **Lab Manager 97** dial the phone to call this salesperson.

## **ADD NEW**

Use this button to add a new Salesman.

## **SEARCH**

Use this button to search for a Salesman.

## **FORM**

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Name:** The salesperson's full name.

**Address:** The salesperson's street address.

**City State Zip:** The salesperson's city, state, and zip.

**Phone:** The salesperson's telephone number.

**S/S:** The salesperson's social security number.

**Area:** The name or code for the area the salesperson is responsible for. Example: PHOENIX or ARIZONA.

**Commission Rate:** The salesperson's commission rate. Example: To enter a 20 percent rate, type in .02 or 20%.

**NOTES:** User definable notes. Many pages of notes can be typed into this field.

**CODE:** Optional user definable code.

**Salesman Photo:** A scanned image of the salesperson can be stored here by simply pasting the image into this box using Window's standard copy and paste functions. CTRL C will copy an image for the highlighted field and CTRL V will paste that image into a highlighted field.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## **TABLE**

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

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## COMPANY & SYSTEM INFORMATION

This is where your own company name and address is defined. Also defined here are a variety of system preferences such as mailing label type and size, invoice and statement size and type, colors used on the work ticket, standard invoice and statement messages, to name just a few.

### COMPANY

Lab Manager - Primary Company - [Company Information]

File Locate Menu UnMark Security Help

## Company & System Information

Exit

Company Interface System

Company Name:

Company Address:

Company City State Zip:

Phone Number:

Fax Number:

Email Address:

UPS Shipper #:

Start Fiscal Year:

Mailing Label Type: Continuous

System Security Activated:

Show Address on Invoice:  Print logo on invoice:  Invoice Copies:

Show Address on Statement:  Print logo on statement:  Statement Copies:

Company Logo:

Enter company name.  NUM

**Company name:** Define your own company name here the way you want it to appear on your invoices and statements.

**Company Address:** Your own company address.

**Company City State Zip:** Your city state and zip.

**Phone Number:** Your phone number.

**Fax Number:** Optional fax telephone number.

**E-mail:** Optional e-mail address.

**UPS Shipper #:** Optional UPS shipping number. This is the number you normally stamp on the box identifying you to UPS.

**Start Fiscal Year:** This is a date field to tell **Lab Manager 97** what month your fiscal year starts. For example, if your fiscal year starts June 1<sup>st</sup>, then type, 06/01/97. The year is not important.

**Mailing Label Type:** This is a drop down list box containing several popular mailing label types and sizes.

**System Security Activated:** When this check box has a check in it, security options are operational. Remove the check from this box to turn off the security options.

**Show Address on Invoice:** When this check box has a check in it, your own company name and address will be printed on the invoice.

**Show Address on Statement:** When this check box has a check in it, your own company name and address will be printed on the statement.

**Print log on invoice:** When this check box has a check in it, Lab Manager will attempt to print your company logo, as shown in the Company Logo box, on the invoice. NOTE: Printing your logo on an invoice will slow the printing of invoices. You might choose to have your invoice form preprinted with your company logo on it. *Laboratory Systems Group, Inc. can help you create great looking customized invoice and statement forms.*

**Print log on statement:** When this check box has a check in it, Lab Manager will attempt to print your company logo, as shown in the Company Logo box, on the statement. NOTE: Printing your logo on a statement will slow the printing of statements. You might choose to have your statement form preprinted with your company logo on it. *Laboratory Systems Group, Inc. can help you create great looking customized invoice and statement forms.*

**Company Logo:** This box can be used to store your company logo. Use a paint, draw, or other type of graphics program to create or scan your company logo then use the standard Windows copy and paste keys to paste your logo into this box.

## INTERFACE

Lab Manager - Primary Company - [Company Information]

File Locate Menu UnMark Security Help

### Company & System Information

Company Interface System

Suppress Dr Name:  Current Case Id:

Statement Order: Invoice # Max Case Id:

Work Ticket # style: Dr Date

Invoice Form Type: Invoice Form - LSR

Statement Form Type: Statement Form - LSR

Work Ticket Type: Work Ticket - LSR

Flash for Errors:  Flash Past Due Accounts:

Invoice Message#1:

Invoice Message#2:

Statement Message#1:

Statement Message#2:

#### Work Ticket Colors

Sun color: Black

Mon color: Red

Tue color: Magenta

Wed color: Cyan

Thu color: Violet

Fri color: Light Blue

Sat color: Black

Print QC Sheets:

Form View NUM

**Suppress Dr. Name:** Place a check here to prevent the doctor's name from appearing on the work ticket form.

**Statement Order:** Use this list box to choose the order in which the invoices appear on the statement. Choices include; Invoice#, Date, or Patient name.

**Work Ticket # style:** Use this list box to choose what is printed at the top of the work ticket in large letters. The choices include; Case number, Receive date, Dr. date, Finish date, Ship by date, and Pan number.

**Invoice Form Type:** Use this list box to choose the type and size of invoice form.

**Statement Form Type:** Use this list box to choose the type and size of statement form.

**Work Ticket Type:** Use this list box to choose the type and size of work ticket form.

**Flash for Errors:** With a check in this box, **Lab Manager 97** will display a variety of messages on the screen when they are appropriate.

**Flash Past Due Accounts:** When checked, the accounts past due balance will be displayed, flashing, on the case entry screen to remind you he has a past due balance.

**Invoice Message#1:** Optional invoice message can be placed here and will be printed at the bottom of each invoice.

**Invoice Message#2:** Optional invoice message can be placed here and will be printed at the bottom of each invoice.

**Statement Message#1:** Optional statement message can be placed here and will be printed at the bottom of each statement.

**Statement Message#2:** Optional statement message can be placed here and will be printed at the bottom of each statement.

**Print QC Sheets:** When checked, cause your quality control sheets to be printed on your invoice form (if your invoice form supports a quality control sheet).

**Work Ticket Colors:** If you have a color printer, use the drop down list boxes next to the Sun through Sat fields to select the color of the large date that prints at the top of the work ticket.

## SYSTEM

Lab Manager - Primary Company - [Company Information]


File Locate Menu UnMark Security Help

### Company & System Information


Company Interface System

Exit


Accounting System Name:

Directory and File name:  


Spread Sheet Name:

Directory and File name:  

Data Base Name:

Directory and File name:  

Word Processor Name:

Directory and File name:  

File Export Path:

Form View NUM

**Accounting System name:** Optional name of the accounting system you are using. For example; **Quick Books**.

**Directory and File name:** Optional directory and file name of the accounting system you are using. For example: **C:\QBOOKSW\QBW.EXE**. The button to the right can be used to browse the hard drive to find the directory and program name. **Lab Manager 97** needs to know this important information before it can export accounting data to it. **Lab Manager 97** can only export accounting data to Quick Books for Windows. *This function will be available sometime after May 1997.*

**Spread Sheet Name:** Optional name of the spread sheet program you are using. For example; **Excel**

**Directory and File name:** Optional directory and file name of the spread sheet program you are using. For example: **C:\MSOFFICE\EXCEL\EXCEL.EXE**. The button to the right can be used to browse the hard drive to find the directory and program name

**Data Base Name:** Optional name of the data base program (if any) you are using. For example; **Access**.

**Directory and File name:** Optional directory and file name of the data base program you are using. For example: **C:\MSOFFICE\ACCESS\MSACCESS.EXE**. The button to the right can be used to browse the hard drive to find the directory and program name.

**Word Processor Name:** Optional name of the word processing program you are using. For example; **Word**.

**Directory and File name:** Optional directory and file name of the word processor you are using. For example: **C:\MSOFFICE\WINWORD\WINWORD.EXE**. The button to the right can be used to browse the hard drive to find the directory and program name.

**File Export Path:** Optional directory name where you want data files to be exported to. Both word processing, spread sheet, and database files will be exported to this directory. A good choice for a directory would be the “**My Documents**” directory. For example: **C:\My Documents**. If in doubt, use **C:\LMWIN**. This information is required if you intend to have **Lab Manager 97** export data to other programs.

# MARKETING

The screenshot shows a software window titled "Lab Manager - Primary Company - [Marketing Information]". The window has a menu bar with "File", "Locate", "Menu", "UnMark", "Security", and "Help". Below the menu bar is a teal header with the word "Marketing" in large white letters and an "Exit" button on the right. Underneath the header are two tabs: "Form" (selected) and "Table". The main area contains a form with various input fields: "Last Name:", "First Name:", "Title:", "Full Name:", "Address:", "City:", "State, Zip:", "Phone:", "Phone 2:", "ID:", "Practice:", "Contact name:", "Definable:", "Follow up:", "Status:", "Codes:", and a "Notes:" text area. A "Mark" checkbox is located between "Title:" and "Contact name:". At the bottom of the form is a blue bar with buttons for "Label", "Print", "Delete", "Un-Do", a telephone icon, "Add New", and "Search". Below the blue bar is a status bar showing "Record: 1 of 1" and a prompt "Enter the last name of this person." followed by a "NUM" field.

This file can be used to store information on accounts you wish to send marketing letters to. **Lab Manager 97** can create labels and reports from the information in this file. Used with Microsoft Word, sells and marketing letters can be created merging the account's name and address onto the letter to create personalized letters. For more information on merging **Lab Manager 97** data into letters and other documents, refer to Exporting Lab Manager data in the Utility Menu.

## LABEL

Click on the button to print a label for this person.

## PRINT

Click on this button to print the information on this screen.

## DELETE

Click on this button to completely delete this record.

## **UNDO**

Clicking on this button will undo your last changes to the information on this screen.

## **DIAL**

Click on this button to have **Lab Manager 97** dial the phone to call this person.

## **ADD NEW**

Use this button to add a new record.

## **SEARCH**

Use this button to search for a person in the marketing file.

## **FORM**

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Last Name:** The doctor's last name.

**First Name:** The doctor's first name.

**Title:** The doctor's title such as DR.

**Address:** The doctor's full street address.

**City:** The doctor's city.

**State:** The two letter state abbreviation.

**Zip:** The doctor's zip code.

**Phone:** The doctor's telephone number.

**Phone 2:** A second or alternate phone for the account.

**Birthday:** The doctor's birth date.

**Practice:** The type of practice.

**Contact name:** A contact name, possibly the receptionist.

**Definable:** Another user definable code.

**Follow up:** The date the doctor should be contacted next.

**Status:** A user definable status of this account. One might use "A" for active, "N" for not interested, or "I" for interested.

**Codes:** Optional user definable codes.

**Notes:** Pages of user definable notes can be typed into this window.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## **TABLE**

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

## PRODUCTION STEPS

Lab Manager - Primary Company - [Step Information]

File Locate Menu UnMark Security Help

### Production Steps

Exit

Form Table

Step #:

Description:

Code:

Days to finish:

Value:

Color: Black

Label:

Mark

How many of these steps can your lab produce on each of these days?

Sun:

Mon:

Tue:

Wed:

Thu:

Fri:

Sat:

Print Delete Un-Do Add New Search

Record: 1 of 1

Step ID number created by computer.

NUM

This function is used to enter or update production step information (define each major production step used in your lab to produce its products).

The information in this file is used for scheduling and requires **Lab Manager 97** scheduling module available late 1997.

### PRINT

Click on this button to print the information on this screen.

### DELETE

Click on this button to completely delete this record.

### UNDO

Clicking on this button will undo your last changes to the information on this screen.

## ADD NEW

Use this button to add a new record.

## SEARCH

Use this button to search for a step.

## FORM

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Description:** Description of production step. For example, preparatory, frame wax-up, frame finish, porcelain buildup, porcelain contour, final finish, deliver (to name just a few).

**Code:** The CODE field is a short description of the production step. This code is used in places where the large step description will not fit. If you can not come up with a code, use the first five letters of the description.

**Days to finish:** The "production time in days" field is used to define the amount of time required to finish this step. If the step requires 2 days to complete, then enter a 2. If the step requires only one tenth (1/10) of a day to complete, then enter .1 . The computer will allocate this number of days to complete this step. Fractional days will be rounded down. Example; 1.7 becomes 1 and .3 becomes 0. Finish times with less than 1 day will have a finish date matching the starting date. If your turn-around time is 10 days, for example, the sum of each of the "days to finish" for each of the steps assigned to a product should add up to 10.

**Value:** The STEP VALUE \$ field defines the value of the step for the purpose of determining technician production. This value is used in the same way that points are used in a point system. You must supply this value from your own computations and judgment.

**Sun. through Sat.:** These fields define the maximum number of steps that can be completed on that day of the week. Lab Manager gives you the ability to define this production number for each day of the week individually. For example, if the technician can do up to 10 units of this step in a day, then the max. steps should be 10. If two or more technicians do one particular step, it is necessary to combine each technicians production capability. For example, if tech#1 can do 10 units a day and tech#2 can do 12 units a day, then your total production capacity is 22.

If the lab is only open half a day on Friday, you should make Friday's production number half that of the other days of the week. This feature can also be used to schedule certain steps only on given days. For example, to schedule your "Wax up" step only on Monday,

place the number of "Wax ups" you can do into the Monday field and leave the others set to zero.

*NOTE: REMEMBER, THE VALUES IN THE STEP VALUE FIELD AND THE MAX. STEPS/DAY FIELD CAN BE EASILY CHANGED AT ANY TIME. DO NOT GET "HUNG UP" OR "BOGGED DOWN" WITH THIS INFORMATION. AS YOU USE THE SYSTEM, YOU WILL BE ABLE TO ASSESS THESE VALUES WITH GREATER ACCURACY.*

**Color:** Optional color selection drop down list. This field has been reserved for later use.

**Label:** This field is used to tell Lab Manager whether or not this step should be included with other steps when printing the scheduling labels. Proper answers include "Y" or "N" for yes or no.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## **TABLE**

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## EMPLOYEE INFORMATION

Lab Manager - Primary Company - [Employee Information]

File Locate Menu UnMark Security Help

### Employees

Record Selector [ ] Exit

Main Security Steps Table

Employees ID [ ] MTD production \$: [ ]

Employees name: [ ] YTD production \$: [ ]

Address: [ ] Hours worked/period: [ ]

City state zip: [ ] Hours worked/MTD: [ ]

Phone number: [ ]

Soc Sec number: [ ]

Type: [ ]

LoginName: [ ]

Password: [ ]

Mark

Print Un-do Delete Add New Search

Record: 1 of 1 Form View NUM

This function is used to enter new or update existing employee information.

### PRINT

Click on this button to print the information on this screen.

### DELETE

Click on this button to completely delete this record.

### UNDO

Clicking on this button will undo your last changes to the information on this screen.

### ADD NEW

Use this button to add a new record.

## SEARCH

Use this button to search for an employee.

## MAIN

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Employees name:** The employee's full name.

**Address:** The employee's street address.

**City state zip:** The employee's city, state, and zip code.

**Phone number:** The employee's telephone number.

**Soc. Sec. number:** Employee's social security number.

**MTD production \$:** For future use.

**YTD production \$:** For future use.

**Hours worked/period:** User defined hours employee normally works per pay period. For example, if the pay period is two weeks, then the hours might be 80 hours (40 x 2).

**Hours worked/MTD:** User defined hours employee normally works monthly. For example, if the technician works 40 hours a week, the monthly hours might be 160 (40 x 4).

**Type:** Use the drop down list to select the type of employee; Hourly, Salary, Full time, etc.

**Login Name:** Use this field to define the employee's login name. Usually the persons first name or initials. This is the name the employee types in when he or she first starts **Lab Manager 97**. This information is required.

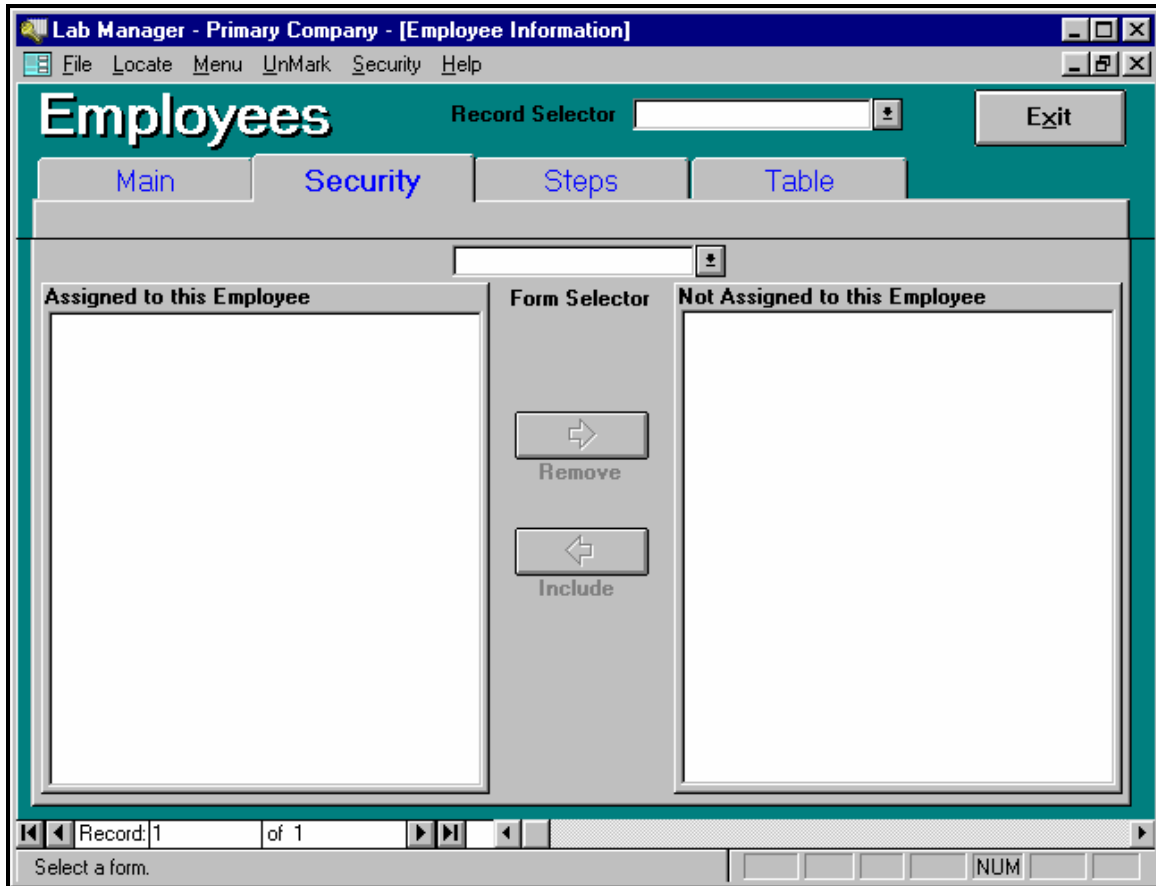
**Password:** Optional employee password. If a password is defined in this field, **Lab Manager 97** will require this password, when it is first started, to use the program. This function is used with the Security function accessed by clicking on the Security tab at the top of the form.

**Photo:** A scanned image of the employee can be stored here by simply pasting the image into this box using Window's standard copy and paste functions. CTRL C will copy an

image for the highlighted field and CTRL V will paste that image into a highlighted field.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## SECURITY



This function is used to limit an employee access to functions and reports in **Lab Manager 97**. To use, first click on the drop down list button above the words Form Selector in the upper center of the form. Next, click on one of the menus shown in the list. This will display a list of buttons in the left window. These buttons are the button the employee currently has access to.

To prevent an employee from accessing a button shown in the left window, click on the item and then click on the Remove button. The removed item will move over to the right box labeled “Not assigned to this employee.” The process can be reversed by clicking on the item in the right box and then clicking on the Include button.

## STEPS

The screenshot shows a software window titled "Lab Manager - Primary Company - [Employee Information]". The menu bar contains "File", "Locate", "Menu", "UnMark", "Security", and "Help". The main interface has a teal header with the word "Employees" and a "Record Selector" dropdown. Below the header are four tabs: "Main", "Security", "Steps", and "Table". The "Steps" tab is selected. The main area is divided into two large empty boxes: "Steps assigned to this Employee" on the left and "Steps NOT Assigned to this Employee" on the right. Between these boxes are two buttons: "Remove:" with a right-pointing arrow and "Include:" with a left-pointing arrow. An "Exit" button is located in the top right corner. At the bottom, a status bar shows "Record: 1 of 1" and a "NUM" field.

The steps tab at the top of the form is used to assign production steps to an employee. To assign a production step to an employee, click on the desired step in the box on the right and then click on the Include button. Steps assigned to this employee will appear in the box on the left. Repeat the process until all of this employee's steps have been selected.

The process can be reversed by clicking on the step in the box on the left and then clicking on the Remove button.

## TABLE

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of

the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

## CALL TRACKING

Id:	Talked With:	Date:	Start time:	End Time:	Notes:
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The call tracking function is unique to Lab Manager 97 allowing the user to keep track of the calls made to doctors. This information includes; contact name, details of the call, date, starting and ending time. A report is included to print a list of the last phone calls made.

To use the function, follow these steps;

- 1) Click on the **NEW** button.
- 2) Select the account you are talking to using the **Customer Name** drop down list box.
- 3) Click on the **START** button.
- 4) Fill in the “**Talked With**” field with the name of the person you are talking to.
- 5) Fill in the “**Details of call**” field with any notes relating to the call.

- 6) You may exit this screen while talking to the account. As long as you don't **leave Lab Manager 97** completely, the timer will continue to keep time until you return to this screen and click on the **END** button.

**New button:** Use this button first to log a new phone call then proceed to the following fields.

**Customer Name:** This is a drop down list of your accounts used to select the account the phone call was with.

**Talked With:** The name of the person you talked to.

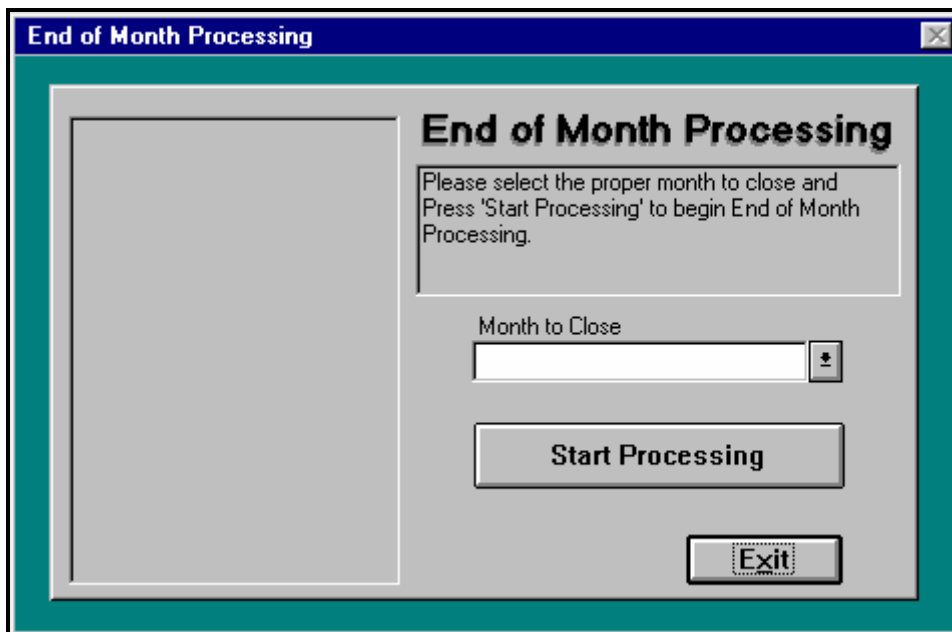
**Date:** The date of the call. The default is always Lab Manager's current date.

**Start Time:** The time of the started. Rather than type in a time, just click on the Start button and **Lab Manager 97** will fill in the starting time for you.

**End Time:** The time the call ended. Click on the End button and the ending time will be filled in for you.

**Details of call:** Optional details or notes concerning the call.

## END OF MONTH PROCESSING



This process updates the material inventory, applies payments to the account balances, ages the accounts, computes service charges, archives the cases that have been statemented, and prepares **Lab Manager 97** for the next month.

This function **MUST** be performed after printing statements at the end of the month. The exact day you close the month is not important. Most people will close the month within a day or two of the actual end of the month, however, you can close on any day.

**Lab Manager 97** will automatically display the end of month processing window when you finish printing statements for all accounts. Because of this, it is important to print any and all reports you want **BEFORE** printing the statements.

If you do print statements and find a problem with one or more of them before actually starting the end of month processing, it is a simple matter of clicking on the **EXIT** button, make the necessary corrections, reprint the related reports, reprint the statements, and then close the month. If a problem is found after the month is closed, the only way to correct the problem is to restore a **BACKUP** of the data made just before closing the month. This is why it is very important to backup up your data each month before closing. If something goes wrong during the month end closing, the backup is your only salvation.

## **END OF THE MONTH PROCEEDURE**

Follow these steps;

- 1) Print any and all desired accounting and production related reports so that you have a record of what was sold, produced, and owed.
- 2) Check over the reports and if a problem is found, correct it and then reprint any reports affected by the change. Repeat this step until everything looks correct.
- 3) Print statements for all accounts.
- 4) Check over the statements. If a problem is found, correct it and return to step two.
- 5) If all statements are correct, and the **End of Month Processing** window is on the screen, select the month you are closing using the drop down list box labeled **Month to close** and then click on the **Start Processing** button. **Lab Manager 97** will keep you informed of what it is doing in the status window above the Month to Close field.
- 6) When the status window tells you that the process is complete, click on the **Exit** button and you are finished closing the month.

There are two ways to get to the **End of Month Processing** window. The first and most common method is to print statements for all accounts. The **End of Month Processing** windows will automatically appear following the printing of the statements. The second method is to select the **End of Month Processing** button at the **Maintenance Menu**. Do not use this method unless you are sure that all statements have been printed correctly. This method might be used if you printed all of the statements, found a problem with only one of them. Printing a statement for a given account does not cause the **End of Month Processing** window to appear. For this reason you would close the month using the **End of Month Processing** button found in the **Maintenance Menu**.

## CLINIC DOCTORS

The screenshot shows a software window titled "Lab Manager - Primary Company - [Clinic Account Information]". The window has a menu bar with "File", "Locate", "Menu", "UnMark", "Security", and "Help". The main title is "Individual Clinic Doctors" with a search box and an "Exit" button. Below the title are three tabs: "Form", "Preferences", and "Table". The "Form" tab is active, showing fields for "Office:" (with a dropdown), "Doctor's name:" (with an "ID:" field), "Phone number:", "Code:", and a "Mark" checkbox. A large "Notes:" text area is below these fields. At the bottom of the form are buttons for "Print", "Un-Do", "Delete", "Add New", and "Search". The status bar at the bottom shows "Record: 1 of 1" and "Office ID (account) number." with a "NUM" field.

This function is used to enter new or edit existing clinic or group doctor names. These are the doctors belonging to a clinic and do not receive a separate bill. Doctors who require a separate bill must be defined in the Account area of **Lab Manager 97**.

### PRINT

Click on this button to print the information on this screen.

### DELETE

Click on this button to completely delete this record.

### UNDO

Clicking on this button will undo your last changes to the information on this screen.

## ADD NEW

Use this button to add a new record.

## SEARCH

Use this button to search for an Individual.

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

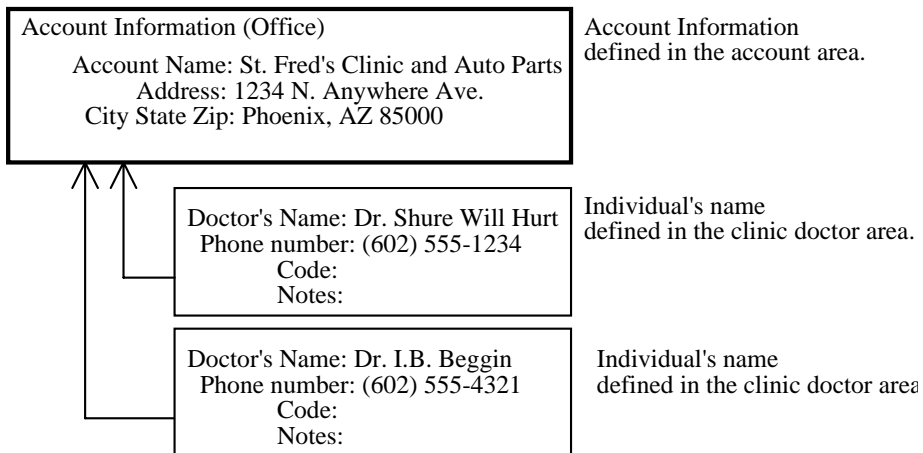
**Office:** Use the click down box to select the office or main account that this individual works in. The office is defined in the account area.

**Doctor's name:** This is the name of the doctor who works in a clinic or group practice. Any number of doctors may be assigned to an office. These doctors will not receive a bill addressed to them but rather it will be addressed to the office (see Account Information).

**Code:** Optional user definable code.

**Notes:** Pages of user definable notes can be stored here.

## How clinic accounts are set up



## PREFERENCES

Preferences:	Dept#	Mark
		<input type="checkbox"/>

**Preferences:** This field is used to define any special orders or preferences that this account might have.

**Dept#:** Use the drop down list box to assign each preference to a department.

**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## TABLE

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at

the top of the screen. This causes the FIND dialog box to appear. Type in any portion of the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

## SCHEDULING CALENDAR

The scheduling calendar is not available in this module of **Lab Manager 97**, but will be available in an add-on module called **Lab Manager 97 Scheduling** available late summer of 1997.

## VENDORS

The screenshot shows a software window titled "Lab Manager - Primary Company - [Vendors]". The window has a menu bar with "File", "Locate", "Menu", "UnMark", "Security", and "Help". Below the menu bar is a teal header with the word "Vendors" in large white letters and an "Exit" button on the right. Underneath the header are two tabs: "Form" (selected) and "Table". The main area contains a form with the following fields:

- Name: [text box] ID: [text box] Mark
- Address: [text box] Code: [text box]
- Address2: [text box] Terms: [text box]
- City, State Zip: [text box] Contact name: [text box]
- Phone: [text box] Instructions: [text box]
- Phone 2: [text box]
- FaxNumber: [text box]
- Notes: [large text area]

At the bottom of the form area is a blue bar containing buttons for "Print", "Delete", "Un-Do", a telephone icon, "Add New", and "Search". Below the form area is a status bar with navigation arrows, "Record: 1 of 1", and a "NUM" field.

This function is used to define information on each of the vendors who supply the billable materials that the lab uses.

## **PRINT**

Click on this button to print the information on this screen.

## **DELETE**

Click on this button to completely delete this record.

## **UNDO**

Clicking on this button will undo your last changes to the information on this screen.

## **DIAL**

Click on this button to have **Lab Manager 97** dial the phone to call this person.

## **ADD NEW**

Use this button to add a new record.

## **SEARCH**

Use this button to search for a person in the vendor file.

## **FORM**

**ID:** This field can be used to jump directly to a given record. For example, to jump to record #99, type 99 into this field and press enter. Record number 99 will be displayed.

**Name::** The vendor's name.

**Address:** Vendor's address.

**Address 2:** Optional second line address.

**City, State Zip:** Vendor's city state and zip code.

**PHONE:** The vendor's telephone number.

**PHONE 2:** Optional alternate telephone number.

**Fax Number:** Optional fax number.

**Code:** Optional user definable code.

**Terms:** The CREDIT TERMS defined here indicate how the vendor expects to be paid.

**Contact:** Used to define the name of the person you usually contact to place your orders.

**Instructions:** Special instructions. These instructions might typically include the method in which the material is to be shipped.

**Notes:** Any special NOTES can be made in this field. Anything can be typed here and is simply for your benefit.

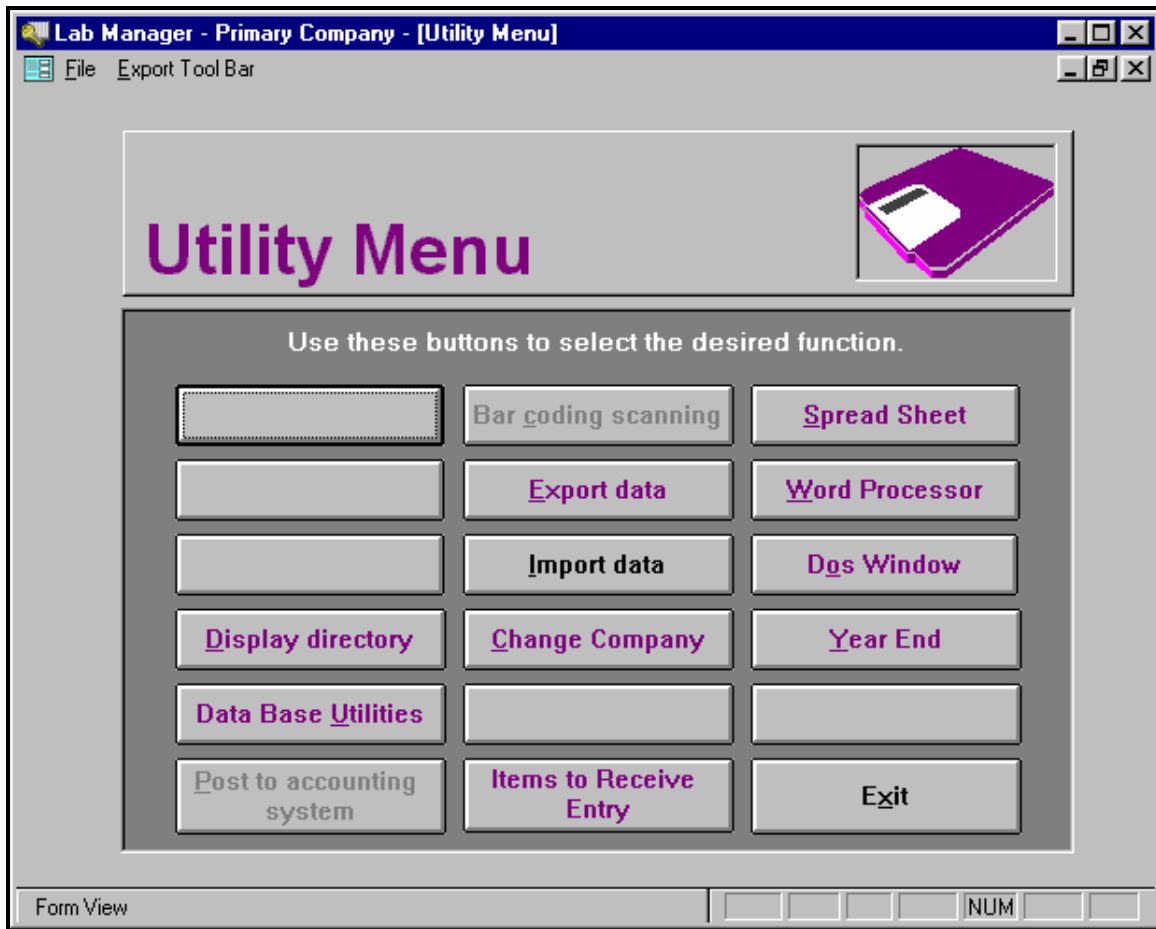
**Mark:** There is a Mark check box associated with most all data in **Lab Manager 97**. This check box can be used to select, or mark, one or more materials and then print a label or a report showing only the materials that have been marked.

## **TABLE**

The table tab at the top of the screen show the information in a table type format with one line per/item. This view of the data some times makes it easier to locate an item or to simply see what was entered already. Information can be entered or updated in either table or form view, though the form view is the most common place to enter new data.

To locate an item in the table view, simply move the cursor to the field or column in which the data you are looking for would appear, then click on the Locate menu option at the top of the screen. This causes the FIND dialog box to appear. Type in any portion of the name or description of the item you are looking for and click on the Find First button. If the item found is not the item you are looking for, then click on the Find Next button. Repeat this procedure until the item is located. Close the Find dialog box and the cursor will be on the line where the data was found. Switching back to the form view and you will see this item there.

# UTILITY MENU



This menu contains a handy collection of utilities which include **Lab Manager 97's** export and import facilities, easy access to your favorite word processor and spread sheet programs, data base utilities for erasing **Lab Manager 97's** data, changing companies, performing year end processing, and modifying the "Items received" list.

## DISPLAY DIRECTORY

This button causes a window to appear with the name of the directory and drive that **Lab Manager 97** is currently using for its data.

## DATA BASE UTILITIES

The data base utilities include buttons for erasing all of **Lab Manager 97's** data and editing/selecting the path or location in which the data is found.

## ERASE ALL LAB MANAGER DATA

This button will completely erase all of the data in **Lab Manager 97** for the selected company. Use this function carefully because it does erase all data.

## **EDIT DATABASE CONNECTIONS**

Clicking on the button causes a window to pop up that shows the Primary Company and its location on the computers hard drive. This function can be used to find and connect to a different company data base.

## **POST TO ACCOUNTING SYSTEM**

This function is used to post certain accounting data to the QuickBooks for Windows accounting system. This function should be operational sometime after June 1997 and will require a small upgrade. For more information on when the function will be available, contact Laboratory Systems Group, Inc.

## **BAR-CODING**

This function, when available in late 1997 for an additional charge, will add several bar-coding related features to **Lab Manager 97**. Bar-coding hardware will also be required.

## EXPORT DATA



Clicking on this button causes the Data Export window to be displayed. In it, you can select what **Lab Manager 97** data you would like to export and in what form it is to be exported. To use this function, use the following steps;

- 1) Click on the item in the **Data Source** window that you would like to export. Clicking on the **Query check box** under From will add many additional items to the **Data Source** window.
- 2) In the **TO** box, select the format of the data to be exported; Text file, Excel Spread Sheet, Word Document, or Mail Merge.
- 3) Fill in the **File Name** field with a name for this exported file. Example: DOCTORS
- 4) Click on the **Export Data** button.

**Lab Manager 97** will export the selected data and then automatically run the appropriate program transferring the exported data into it. The next thing you will see is your data in Microsoft Word or Excel ready for you to play with it.

## IMPORT DATA

This function is used to import data from Lab Manager version 16 (the DOS version) to **Lab Manager 97**. This function is usually used only once to transfer data from the DOS version to the Windows version. Be careful not to repeat this function unless because it will either erase the current data in **Lab Manager 97** or will append the imported data to what is already there; duplicating your data.

Import procedure;

- 1) Install **Lab Manager 97**.
- 2) Start up the DOS version of Lab Manager. Lab Manager version 16 required.
- 3) At the Main Program Menu, type in the letter "E" for export and press ENTER.
- 4) At the Export Menu, select 1 to begin the export process and press ENTER.
- 5) Lab Manager (DOS version) will ask in which drive the Windows version was installed. The default answer is "C".
- 6) Lab Manager (DOS version) will then look for the Windows version and if found will display the PATH where it found it. If this is the correct PATH then press ENTER.
- 7) Lab Manager (DOS version) will scan the hard drive for old data and will display what it found in a box at the right of the screen. Use the arrow keys or the Page Up and Page Down keys to scroll through the list using the F5 function key to remove from the list any directories that you don't want exported. For example, if you have a directory with play data in it, it should be removed. If you have two or more companies, remove company "B" from the list so that only company "A" is exported, then, start up **Lab Manager 97** and import company "A". Return to the DOS program and repeat the export process, this time, removing company "A" from the list and exporting company "B". Return to **Lab Manager 97**, create a new company for company "B", switch to it and then import the data to it.
- 8) After deleting any directories that you don't want to export, press ENTER.
- 9) Lab Manager (DOS version) will again display the small window at the right, this time showing only the directories to be exported. If this is wrong press ESC and start again. If the list is correct, press ENTER to begin the export process. The process is very quick and should only take a few minutes.
- 10) After the data has been exported successfully, exit the DOS version of Lab Manager, return to **Lab Manager 97** and import the data there.

Exporting data from the DOS version does not delete or modify the DOS data at all, therefor, the process can be repeated if necessary. The DOS version of Lab Manager will continue to operate as usual after the export process.

## **CHANGE COMPANY**

If you have two or more companies set up in **Lab Manager 97**, this function is used to switch from one company to another. Simply click on the Data Source drop down list box, click on the company you want and then click on the Change Database button.

## **ITEMS RECEIVED**

Use this function to Add, Delete, or Edit the Items to be Received list found in the case entry and update area. This list of doctor items should contain a complete list of all of the things you might receive from the doctor that you would like to keep track of.

The default list is for use as an example. Please feel free to delete the items in this list that don't apply to you and add your own.

To delete an item already on the list, click on the gray box just to the right of the item in the list. This will highlight the item, then, press the DELETE key.

To add an item to the list, scroll to the end of the list, click on the blank item at the bottom, then type in the description of the new item. Press ENTER to add another item until all are entered.

## **SPREAD SHEET**

Click on this button to launch the spread sheet defined in the System tab of the Company & System Information form. See Company & System Information for more details.

## **WORD PROCESSOR**

Click on this button to launch the word processor defined in the System tab of the Company & System Information form. See Company & System Information for more details.

## **DOS WINDOW**

Click on the button to open a DOS window to execute a DOS function. The DOS version of Lab Manager can be run within this window. Type EXIT at the DOS prompt to return to **Lab Manager 97** and close the DOS window.

## **YEAR END**

Use this button at the beginning of your new fiscal year to reset the Year To Date totals to zero. This only needs to be performed one a year.