

Transactor Coffee Break Tour

A short informal tutorial for Transactor using the installed Example Lab Co



Welcome to the Coffee Break Tour

Use this tour to get familiar with using **Transactor**. If you haven't yet installed **Transactor** see Install Transactor

For more details on the procedures described in the tutorials please refer to Basic Working Procedures in Transactor Help.

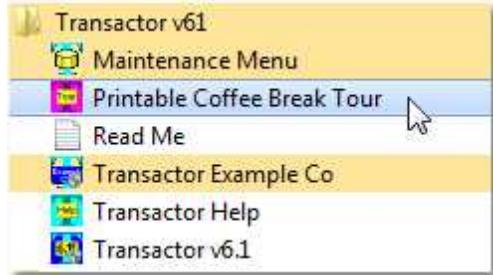
DO feel free to experiment, because anything you do here won't affect your main 'Live' **Transactor** system.

So get the coffee on and let's get started. [Tour the Main Form](#) ⁽²⁾

Do you prefer a printed tour?

If you prefer to print out this tutorial a printer-friendly version is available as follows:

- From the Windows *Start* menu, choose *All Programs (program files) - Transactor v61 - Printable Coffee Break Tour*



If your computer is not able to open PDF files, you can get a free PDF Viewer from the internet. One such viewer is available from www.foxitsoftware.com or www.adobe.com

- In the PDF viewer, from the *File* Menu, choose *Print*

1 Tour the Main Form

Let's start by taking a look at Transactor's Main Form using the example lab data called DentaLab LTD with its set of fictitious Surgeons and sample jobs.

Starting the example dental lab Transactor Main Form

- From the Windows Start menu, choose *All Programs (or Program Files)-Transactor v61-Transactor Example Co*

You should now see the Main Form. It may help to maximise this window.

Code	Description	Tax	Done	Price	Qty	Value
PATIENT	Mason, R, Mr					
SHADE	F7					
NOTATION	R 5 L					
BCRP	Bonded Crown (Non-precious)	JOHN		79.80	1	79.80
CCR	Cold Cure Rollin			19.00	1	19.00
TOTAL						98.80

Notice the caption at the top for the example company we are using, DentalLab Limited.

Notice the Menu Bar at the top and the Tool Bar underneath the menu bar. The Tool Bar has some useful buttons which we'll try in a moment.

Notice the Function Bar at the bottom and the status bar below it. The Status Bar at the bottom usually displays a short helpful message.

Using the Job Navigator tool

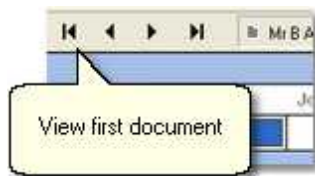
- Just below the main menu, in the Tool Bar, click the *View Last Document* icon



You should see the last Job Document that was entered in the example DentaLab Limited system.

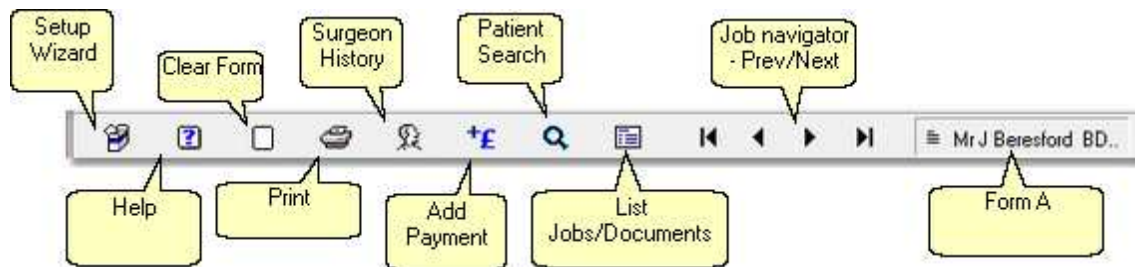
Notice the job details are in a 'grayed out' text. This means they can't be accidentally modified. More on how to modify jobs later.

Try the 'View First Document' button and have a look at some of the other jobs. If you hover the mouse over the tool icons you will get useful hints..



Trying some other Actions and Functions

- Hover the mouse over some of the other tool bar buttons to see what they do



- Try *Clear Form*. Then point the mouse into the Surgeon Account area, and double click to bring up the Surgeon selector. This is the same as choosing *Surgeon - Select* from the Main Menu.



Note: You may see some menu choices, or icons are not available. For example, if you have started, or are modifying a job on the form, the Clear Form icon will be unavailable. This is because Transactor doesn't want you to accidentally clear the form. Instead you need to choose an Action for the current job eg. Book it in, Out or Delete it. Read more about this in the next section.

Once you've finished experimenting, press F12 to clear the form, or click on 'Clear Form' on the toolbar.

You'll now be back to a clear Main Form.

2 Understanding Actions

Actions are 'Start New Job', 'Book In', 'Book Out' etc. You'll quickly become familiar with these 'Actions' since the whole system is based around them.

Actions are done by choosing them from the Menu, but they are also available from the Function Bar at the bottom of the Main Form.

The Function Bar is a handy way to quickly see what Actions you can choose. Some may be disabled (grayed out) because it isn't valid for what you are doing. For example if you have no job details showing on the Main Form, 'Book Out' just doesn't make sense!

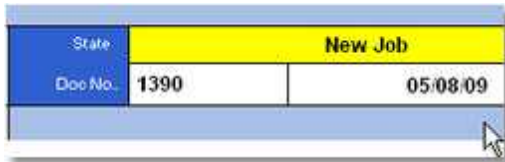
Let's do some simple Actions now just to get a feel for it.

The New Job Action

- From the Main menu, choose Action - New Job, or choose F3 New Job from the Function Bar.



You will see that the top right of the Main Form shows the Doc No which is also the Job No. Notice that the State box describes the job's status in full (New Job)., later on this could display 'Booked In', 'Booked Out' or 'Booked Out Charged'.



We'll cover New Jobs and Booking In later, for now we'll just practice aborting this new job, to go back to a clear Main Form. A New Job has been started, Transactor won't let us simply click *Clear Form* so we need to practice using the Delete Action.

- From the Main menu, choose *Action - Delete*

Transactor doesn't want users to do things like deleting jobs accidentally, so it asks you for confirmation.

- In the Confirm Action dialog, choose *Delete Job*

You'll now be back to a clear Main Form and we have demonstrated that after starting a job you can Delete it rather than continuing.

3 The Clear Form Action

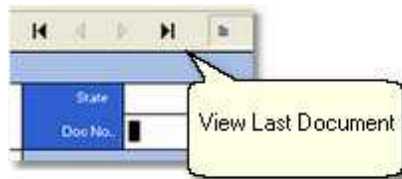
Clear Form is frequently used. For example, if you have been using the Main Form to view a Job's details then at some point you need to clear this Job from the form so that you can select a different Surgeon or Job/Document.

The Clear Form is available from the Function Bar (F12), the Action Menu, and the Main tool bar icon.

If you are working on a New Job or modifying an existing job (i.e. not just viewing), you won't be able to clear the form because you need to Action the current job first (*Action... Book-In/Book-Out/Delete* etc.)

To Clear the Main Form

- First of all, lets retrieve a Job Document onto the Main Form so in the Tool Bar, click the *View Last Document* icon



- After viewing a Job Document click the Clear Form Icon on the main Tool Bar.



Sometimes you cant just Clear the Form. We'll explain this now. First of all retrieve the last Job Document onto the Main Form again.

- Now with a Job Document on the Main Form being viewed, from the *Action* menu choose *Modify*



- Now click *Modify Job* to confirm

Surgeon Account...		Surgeon	State	Modify Job Booked In
Mr B Adams BDS (328)		2252.52 D	Doc No.	1388 04/08/09
Cooden Dental Surgery 146 Cooden Sea Rd Bexhill-On-Sea, East Sussex TN39 4SL Tel: 01424 579135		Reference	Current Job State	
		Usual Prices	NHS (n)	
		On Book out	Charge £	
		Due Date	11/08/09 Tues	

Note the Job State has now changed from just 'Booked In', to 'Modify Job Booked In'. This Job-Document for dental surgeon Mr B Adams, can now be edited.

We'll assume that for some reason we want to mark this job such that when it is booked out, an Invoice will not be raised. In other words, the job won't be charged for at this stage but it will be stored in a state of 'Booked Out Ongoing'.

- Click in the *On Book out* box and Change it from 'Charge' to 'On-Going'

Surgeon Account...		Surgeon	
Mr B Adams BDS (328)		CREDIT LIMIT	
Cooden Dental Surgery 146 Cooden Sea Rd Bexhill-On-Sea, East Sussex TN39 4SL Tel: 01424 579135		Reference	
		Usual Prices	NHS (n)
		On Book out	Charge £
		Due Date	11/08/09 Tues

Click to drop down the List Box

On-Going
Charge
On-Going

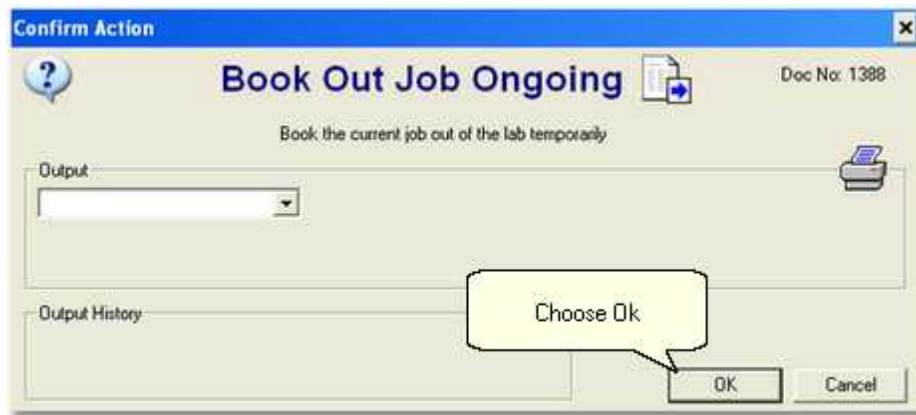
Choose 'On-Going'

- Now choose Action - Clear Form

...Having trouble ?

The Clear Form action is disabled/greyed out and Transactor will not let you clear the Form because you may accidentally lose job details. Instead, if you want a clear form you first need to decide what you want to do with this Job Document that is currently being modified. We could Book it back in, Book it out, put it On Hold, or Delete it. Let's just do the most likely thing if we were modifying a Booked In job, we'll Book it out.

- Choose Action - Book Out (F8)



Notice Transactor 'knows' this job is to be booked out without charging at this stage, so you are asked to confirm *Book Out Job Ongoing*. Now you will see a clear form. If you choose View Last document you'll see that the state of this job is marked as Job Booked Out Ongoing.

Now let's move on to [Tour Surgeons](#) ⁹

4 Tour Surgeons

Ok so far but now it's time to get to take a peek at selecting Surgeons and Practices onto the Main Form.

- If you already have a job on the form, choose Clear Form first.

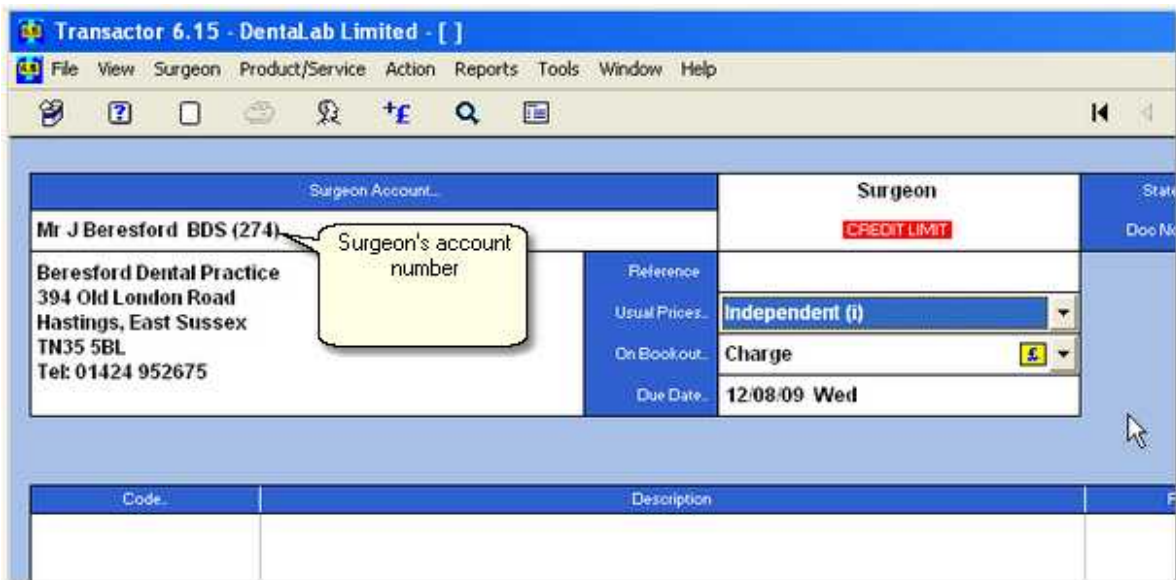
Note: If the Clear Form function is disabled (greyed out) and you are unsure what to do, see [Understanding Actions](#) ⁵

Selecting a Surgeon for a job

- From the Surgeon menu, choose Select..



- In the Surgeon Account Selector's list, choose 'Beresford'. There are three easy ways to do this. (i) By double clicking the row with the mouse, or (ii) Hi highlight the row and press *Enter*. or (iii) Highlight the row and click *Select*.



That Surgeon has now been selected onto the Main Form. In the example lab, Mr Beresford's practice address is the same as his invoice address and so Transactor has no need to display it in full.

In case you are wondering, Surgeons can have several accounts, each one working out of different practices. You'll see how this works in the User Guide.

We chose Mr Beresford (account no 274) as the Surgeon in our example because that's one of the four surgeon accounts that has sample jobs. The others are 'Adams', 'Dodds' and 'Kelly'.

If you know a Surgeons's account no you can use it to quickly select the surgeon even more quickly. Let's try this but first remember to clear the form (F12).

- In the Surgeon Account box, type 274 and press Enter.

A screenshot of a software interface showing a search box titled "Surgeon Account...". The text "274" is entered into the box, and a mouse cursor is positioned over the text.

Mr Beresford's details are retrieved onto the Main Form.

Another way select a Surgeon onto a clear form is by surname. Don't forget to clear the Main Form first.

- In the Surgeon Account box, type the surgeon's surname (or just the first few letters of it) and press Enter.

A screenshot of a software interface showing a search box titled "Surgeon Account...". The text "Ber" is entered into the box, and a mouse cursor is positioned over the text.

A window will appear showing any Surgeons matching what you typed. If only one account is showing you can just press Enter to save time, otherwise highlight the correct account and then choose 'Select'.

A screenshot of a "Surgeon Account Selector" window. It features a search field with "Ber" and a "Find" button. Below the search field is a table with two columns: "Surgeon name" and "Practice name & address (or * Invoice address only)". The first row of the table is highlighted in blue and contains the text "Beresford, J, Mr" and "Beresford Dental Practice, 394 Old London Road, Hastings, I". A mouse cursor is pointing at the first row.

In this topic we've shown you a few ways to retrieve a Surgeon's details onto the Main Form. You may want to do this either to view the Surgeon's record, job list/history, or to assign the Surgeon to a New Job.

5 Understanding Surgeons and Practices

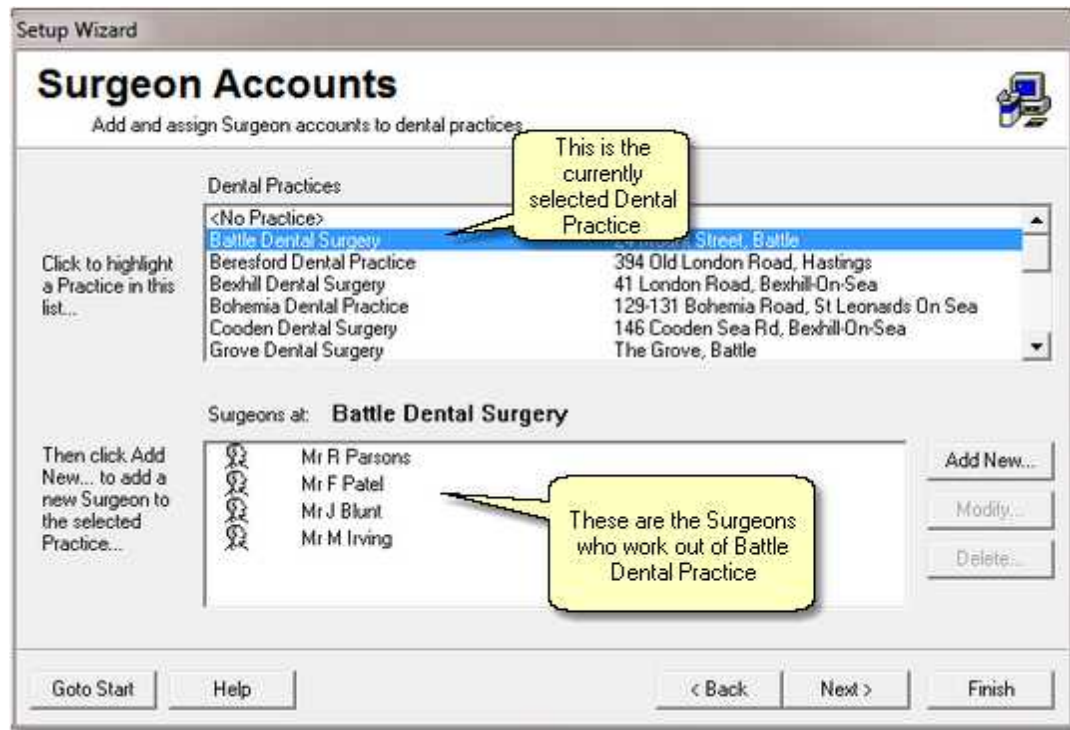
Let's spend a moment to understand how Transactor assigns and maintains Surgeons with Dental Practices.

In [Tour Surgeons](#) ⁹ you saw how Surgeon Accounts are selected onto the Main Form for various day to day tasks such as booking in a job. The Main Form Surgeon menu can also be used to Add and Modify Surgeon accounts.

Let's now take a peek at the Surgeon Accounts page in the Setup Wizard because it's a good way to show you graphically, how Surgeon's can work out of one or more Dental Practices.

To view the Surgeon Accounts page in the Setup Wizard

- From the Tools menu, choose *Setup Wizard*
- In the Setup Wizard, choose *Next* until you get to the Surgeon Accounts page
- Click on Battle Dental Surgery



A list of Surgeons will appear in the bottom window who work out of the selected Dental Practice.

Take a mental note that Mr J Blunt has a Surgeon Account assigned to this Practice. Suppose Mr Blunt has just phoned to say he will now work out of Bohemia Dental Surgery as well as Battle Dental Surgery.

- In the upper window, select 'Bohemia Dental Practice', note there are already three Surgeons with accounts at this Practice.
- Click Add New

Dental Practices

<No Practice>	
Battle Dental Surgery	24 Mount Street, Battle
Beresford Dental Practice	394 Old London Road, Hastings
Bexhill Dental Surgery	41 London Road, Bexhill-On-Sea
Bohemia Dental Practice	129-131 Bohemia Road, St Leonards On Sea
Cooden Dental Surgery	146 Cooden Sea Rd, Bexhill-On-Sea
Grove Dental Surgery	The Grove, Battle

Click to highlight a Practice in this list...

Surgeons at: **Bohemia Dental Practice**

	Mr A Innes
	Mr G Vincent
	Mr C Austin

Then click Add New... to add a new Surgeon to the selected Practice...

Click Add New

Add New...
Modify...
Delete...

- In the 'Add New Surgeon Account' form, enter Mr Blunt's name and initials and click Ok

Add New Surgeon Account

Surname	Initials	Title	Professional titles (eg. BDS)
Blunt	J	Mr	BDS

company name

DENTAL PRACTICE

Bohemia Dental Practice
129-131 Bohemia Road
St Leonards On Sea, East Sussex
TN37 6RE Tel: 01424 135791

Type: Surgeon Usual prices: NHS

INVOICE ADDRESS Same as above

Street1: BOHEMIA DENTAL PRACTICE
Street2: 129-131 BOHEMIA ROAD
Town: ST LEONARDS ON SEA
County: EAST SUSSEX
Postcode: TN37 6RE

Tel no: 01424 135791
Fax/Tel:
Email:

Credit limit: 5000 Discount %: 0

Added: 15/08/09 Modified: 15/08/09

Notes... OK

1. Enter the Surgeon's Name, Initials and Title.

2. Click OK

So now Mr Blunt now has two accounts, one of which is his new account for work sent to Bohemia Dental Practice, and the other for work sent to Battle Dental Practice.

Surgeons at: **Bohemia Dental Practice**

	Mr A Innes
	Mr G Vincent
	Mr C Austin
	Mr J Blunt

Then click Add New... to add a new Surgeon to the selected Practice...

Now click on *Back* to go to the Dental Practices page. That is where you can experiment with adding new Dental Practices, or changing their details.

- Click *Finish* to exit the Setup Wizard

You will find yourself back at the clear Main Form. If you choose Surgeon - Select from the Main Menu, you'll see that Mr Blunt's name appears twice, once at each of the two practices he works out of.

6 Jobs and Documents


In this topic we'll take a look at the various ways of handling jobs and documents on the screen.

One common requirement is to view a list of jobs for a selected Surgeon.

Using the Surgeon History

- Select Dodds (204) onto the Main Form (see [Tour Surgeons](#) ^{9b})
- From the Surgeon menu, choose History (F11)..

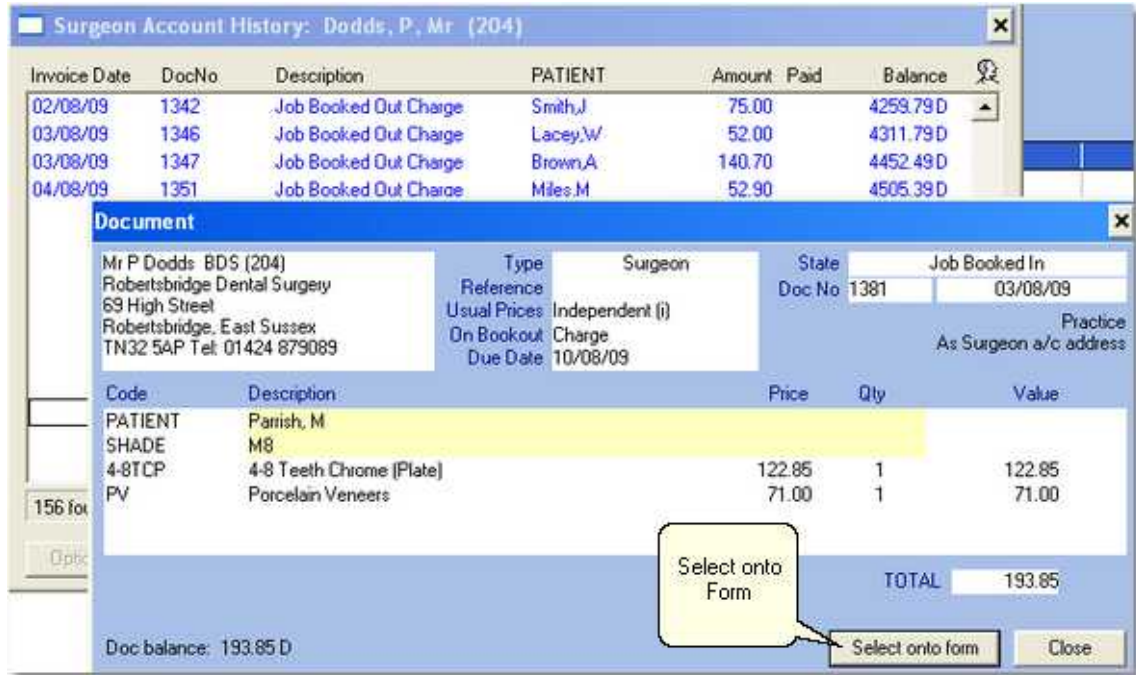
Surgeon Account History: Dodds, P, Mr (204)						
Invoice Date	DocNo	Description	PATIENT	Amount	Paid	Balance
02/08/09	1342	Job Booked Out Charge	Smith,J	75.00		4259.79D
03/08/09	1346	Job Booked Out Charge	Lacey,W	52.00		4311.79D
03/08/09	1347	Job Booked Out Charge	Brown,A	140.70		4452.49D
04/08/09	1351	Job Booked Out Charge	Miles,M	52.90		4505.39D
	1362	Job Booked In	Jones,Tim	108.60		
	1363	Job Booked In	Summers,W	86.15		
	1367	Job Booked In	Richardson..	38.38		
	1368	Job Booked In	West,L	122.85		
	1369	Job Booked In	Flynn,K	157.20		
	1374	Job Booked In	Wilson,T	82.80		
	1376	Job Booked In	Trimble,S	91.28		
	1381	Job Booked In	Parrish,M	193.85		
	1382	Job Booked In	Williams,R	44.35		
	1386	Job Booked In	Paltrow,K	186.60		
156 found				Total open:	1112.06	CURRENT BALANCE 4505.39 D

Options...  Black items are 'Locked' (cannot be changed) View... Close

You'll see a list of jobs 'Booked In' and jobs 'Booked Out Charged' for 'Dodds'. You'll also see his payments.

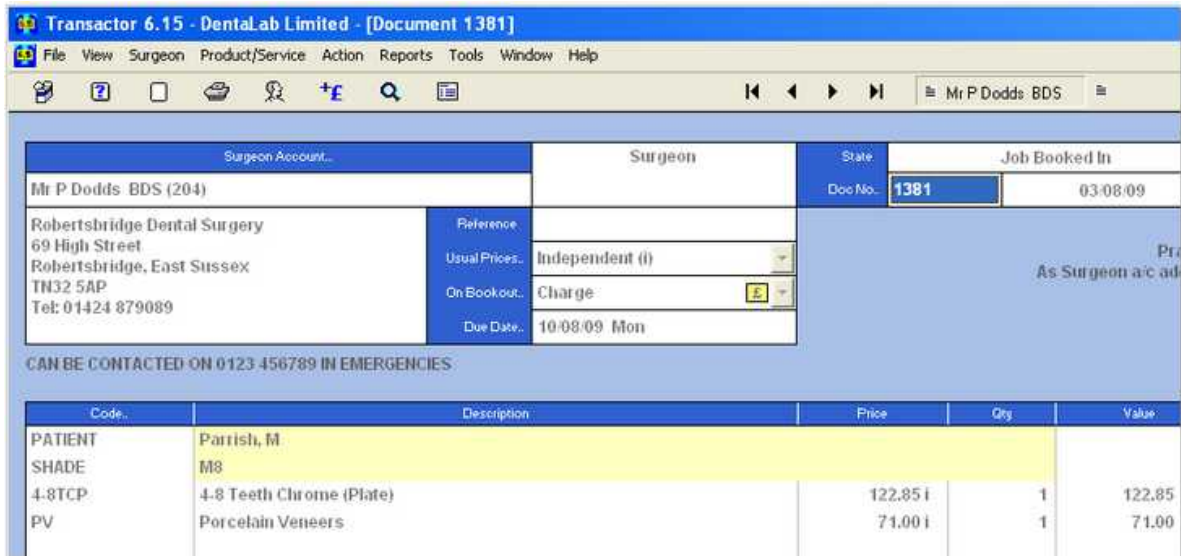
- Highlight the job for the patient 'Parrish,M' (DocNo 1381) and click 'View'.
- If you scroll up you'll see the items at the top of Mr Dodd's list are in black. This means they are 'locked' and cannot be modified. The Main Help explains about Locking and Un-Locking of Job

Documents.



You'll see a summary view of the selected job in a window. We'll go the whole hog and select this job onto the main form.

- In the Document window, choose 'Select Onto Form'



Now we have a job shown on the Main Form. It is in a 'Read' or 'Viewing' state with grayed-out text, this indicates you can't accidentally modify any details. Look at the Function Bar to get a hint of what you can now do with this job/document.

In fact there are several ways to quickly retrieve job details onto a clear Main Form.

Surgeon History (which we have just used)
 or Job Number
 or View \ Booked In Jobs due by
 Tools \ Patient Search (You can type all or the first part of the patient's name and press *Enter*).
 View \ Jobs-Documents (Scroll down to the selected Job).

Try each of these now. Clear the Main Form each time.

7 Booking In a New Job

You'll need a clear Main Form so if there's a job showing, you need to clear it first.

Starting a New Job

- From the Action Menu, choose 'New Job', (or press F3).

Notice the new Document No (The Job No) is visible on the right). This Example Lab is set up to do to automatic job numbering but in your 'Live' system you can use the Setup Wizard to opt for manual job numbering so that you enter the new job numbers yourself if you wish.

- Select a Surgeon onto the Main Form. If not sure how to, see [Tour Surgeons](#)

Surgeon Account...		Surgeon	State	New Job	
Mr P Dodds BDS (204)		4505.39 D	Doc No...	1391	0
Robertsbridge Dental Surgery 69 High Street Robertsbridge, East Sussex TN32 5AP Tel: 01424 879089		Reference	As Sur		
		Usual Prices:	Independent (i)		
		On Bookout:	Charge £		
		Due Date:	12:08:09 Wed		
CAN BE CONTACTED ON 0123 456789 IN EMERGENCIES					
Code..	Description	Price	Qty		
PATIENT SHADE NOTATION	R _____ L _____				

For the moment we'll skip Usual Prices, On Bookout and Due Date info as these are explained in the main Help.

- Enter a Patient name by double-clicking 'Patient' in the 'Code' column.

Modify Line: PATIENT

Surname: Williams Initials: John Title: Extra:

Do not print on invoice

OK Cancel

Now we'll move on and enter some Product/Services.

- Place the cursor on a blank row in the Code column and press *Enter*, or choose Products & services from the Product/Service menu.

Products and Services

Find by Code: Find State: SALES ITEM

Code	Description	Price	Stock	Property
4-10TCM	4-10 Teeth Chrome (Skel Multiple)	138.20	yes	Prosthetics
4-8T	4-8 Teeth	62.10	yes	Prosthetics
4-8TCP	4-8 Teeth Chrome (Plate)	122.85	yes	Prosthetics
AJC	Acrylic Jacket Crown	17.50	yes	Crown&Bridge
BCNP	Bonded Crown (Non-precious)	79.80	yes	Crown&Bridge
BCP	Bonded Crown (Precious)	83.80	yes	Crown&Bridge
BCSP	Bonded Crown special edition	85.60	yes	Crown&Bridge
BPNP	Bonded Pontic (Non-precious)	44.35	yes	Crown&Bridge
BRNP	Bonded Retainer (Non-precious)	86.15	yes	Crown&Bridge
CCR	Cold Cure Reline	19.00	yes	Other

43 found

Add new... Options... Blue items: Work completion required Select onto form... Close

- Highlight an item such as 'BCP' and choose *Select onto form...*
- Verify or amend the price and quantity, then click *OK*.
- On another blank row, press *Enter*, and the *Products and Services* window will appear. You can change the properties of one of the line items.
 - Right click the item and choose *Properties*
 - or
 - highlight the item and click the *Options* button

In the Properties window you can change the price, description, or other properties.

Close the Properties window if you have opened it.

- Choose *Select onto form*

Repeat the above steps a few times to add a few more Products or Services.

After you have specified the details of the job, we can proceed to Book it in.

- From the Action Menu choose *Book In* (F7) and click OK
- The Confirm Action window appears. Here you can choose to print a job ticket if you wish, or just leave the output box blank.
- Click Ok

That's it, the job is booked into Transactor, but It can be retrieved at any time.

Notes

The full User Guide has a lot more information for example:

How you can use the keyboard instead of the mouse.

Using automatic job numbers or manually typing in your own unique job number each time you start a new job.

Why in this example the Independent price band came up automatically for this Surgeon, and how a Surgeon's preferred price band can be configured.

Notice that this Job could be directly Booked In and Out straightaway by choosing *Action-New Job* then *Book-Out*. You'd only want to do this if the work had commenced without the job being booked into the computer (not a recommended practice).

Transactor didn't print anything when you booked the example job in, but the User Guide shows you how Transactor can be configured to prompt you for your usual printing habits, a Job Ticket on Booking In, Despatch Notes and Invoices on Booking Out. Isn't Transactor wonderful!

8 Booking Out a Job

After having tried some Booking In let's have a quick go at at Booking Out.

NOTE

For more details and options refer to Booking Out a Job - (main Help).

To Book Out a Job (Summary)

- Retrieve the Job onto the Main Form
- Edit/Modify the Job if the details need updating or the On-Bookout box is not correctly set (to either 'On-Going' or 'Charge').
- Choose the Book Out action

To Book Out a Job (step by step)

First ensure you have a [Clear Form](#) ⁶.

There are several ways to quickly locate and retrieve a Job on the computer. The fastest is by using the Doc No, also called a Job No. We will assume we don't have the job number handy and select a Job from Mr Beresford's history list.

- Select Mr Beresford onto the Main Form. If you don't know how to, see [Tour Surgeons](#) ⁹, then choose Surgeon History.



- In the Surgeon Account History window, highlight one of the jobs at the bottom with a description of 'Job Booked In'.

The image shows a window titled "Surgeon Account History: Beresford, J, Mr (274)". It contains a table with the following data:

Invoice Date	DocNo	Description	PATIENT	Amount	Paid	Balance
26/07/09	1266	Job Booked Out Charge	Hopkins,A	102.53	✓	1929.63 D
28/07/09	1228	Job Booked Out Charge	Anderson,J	102.53	✓	2032.16 D
28/07/09	1329	Job Booked Out Charge	Jackson,F	56.40	✓	2088.56 D
01/08/09	1345	Job Booked Out Charge	Tomlinson,J	54.50	✓	2143.06 D
03/08/09	1350	Job Booked Out Charge	Blair,T	37.14	✓	2180.20 D
04/08/09	1322	Job Booked Out Charge	Summers,K	69.50	✓	2249.70 D
21/08/09		CHEQUE		-2300.50	✓	50.80 C
27/08/09	1373	Job Booked Out Charge	Jenkins,S	490.07		439.27 D
	1360	Job Booked In	Mason,R	98.80	■	
	1361	Job Booked In	Quigley,E	69.28		
	1366	Job Booked In	Thompson..	83.60		
	1380	Job Booked In	Rawlings,T	70.69		
	1385	Job Booked In	Manning,N	47.47		
	1332	Job Booked In	Smith	15.50		
	1395	Job Booked In		258.45		

At the bottom of the window, it shows "90 found", "Total open: 643.79", and "CURRENT BALANCE 439.27 D". There are buttons for "Options...", "View...", and "Close". A note says "Black items are 'Locked' (cannot be changed)".

- In the Surgeon Account History window, highlight one of the jobs at the bottom with a description of 'Job Booked In'.
- Click *View*, then in the next window press *Enter* to choose the *Select Onto Form* button.
- From the Action Menu, choose *Modify* or press F4

- Ensure the On-Bookout box is set to *Charge*. (in this example we want to finalise the job when it is Booked Out this time).

The screenshot shows the 'Modify Document 1395' window in Transactor 6.15. The window is divided into several sections:

- Surgeon Account:** Mr J Beresford BDS (274)
- Practice Address:** Beresford Dental Practice, 394 Old London Road, Hastings, East Sussex, TN35 5BL, Tel: 01424 952675
- Surgeon:** 697.72 D
- State:** Doc No. 1395
- Modify Job Booked In:** 21:08:09
- Reference:** Independent (i)
- On Bookout:** Charge (with a callout box: 'Set On Bookout to 'Charge'')
- Due Date:** Charge

The main table displays job details:

Code	Description	Price	Qty	Value
PATIENT	Smith, John, Mr			
SHADE				
NOTATION	R _____ L _____			
BRNP	Bonded Retainer (Non-precious)	86.15 i	3	258.45
TOTAL				258.45

A callout box at the bottom of the table says: 'Check and adjust job details and prices'.

- From the Action menu, choose *Book Out* or press F8

The 'Confirm Action' dialog box is titled 'Book Out Job Charge' and contains the following information:

- Doc No:** 1395
- Instruction:** Book the current job out of the lab and charge for it
- Output:** Delivery Note to Practice (A4) To Batch Queue 1 copy
- Output History:** (Empty field)
- Invoice Date:** 01/09/09
- Buttons:** OK, Cancel

- In the Confirm Action window, ensure Output is set to Delivery Note to Practice (A4), to Batch Queue, then Press Enter.

That's it, this job is Booked Out and finalised. It will appear on this Surgeon's statement for this month.

After a batch of jobs have been booked in we can optionally print despatch notes with Jobs grouped together by Dental Practice. See [Printing a daily report](#) ^[21]

Note

If required, we could have setup Transactor to automatically print an Invoice as well as the batched Despatch Note, but there's more about this in the main Help. You may be interested to know what happens if you notice a mistake after booking a job out. Well normally you can still modify the job and book it back out again providing the lab manager hasn't done a 'Locking' for the finalised (charged) jobs in this date period. Again there's more about this in the main Help.

See also

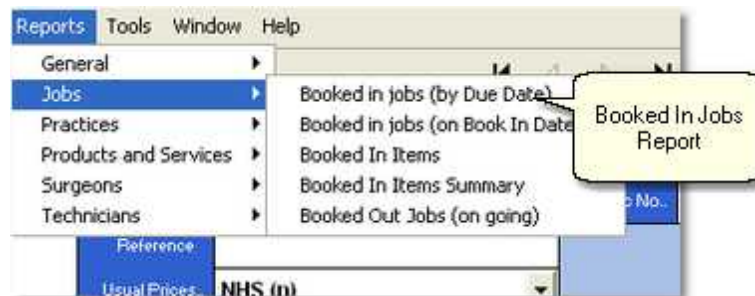
- Selecting an Existing Job - (main Help)
- Patient Search - (main Help)

9 Printing a daily report

Printing a Booked In Jobs Report

A typical daily report which is used for Job Scheduling.

- From the *Reports* menu, choose *Jobs - Booked in jobs (by Due Date)*



- You'll get a few options but you can leave these as they are and just click OK.

Report: Booked in jobs (by Due Date)

Options

Sort by

Due Date

Properties

Change...

Page Format

Output to

To report on ALL dates, leave Due Date blank.

OK Cancel

The report will come up in a print preview window.

Due Date	Surgeon	Doc#	Patient	On Book/Out
07/08/09 Fri	Beresford (274)	1360	Mr R Mason	Charge
	Beresford (274)	1361	E Guigley	Charge
	Dodds (204)	1362	Tim Jones	Charge
08/08/09 Sat	Adams (328)	1365	Miss S Jennings	Charge
	Dodds (204)	1367	R Richardson	Charge
	Dodds (204)	1368	Ms L West	Charge
	Dodds (204)	1369	K Flynn	Charge
	Kelly (295)	1370	C Patterson	Charge
	Adams (328)	1371	Mrs G Nelson	Charge
	Adams (328)	1372	R Harris	Charge
09/08/09 Sun	Kelly (295)	1364	Mr D Morrison	Charge
	Beresford (274)	1366	W Thompson	Charge
	Beresford (274)	1373	S Jenkins	Charge

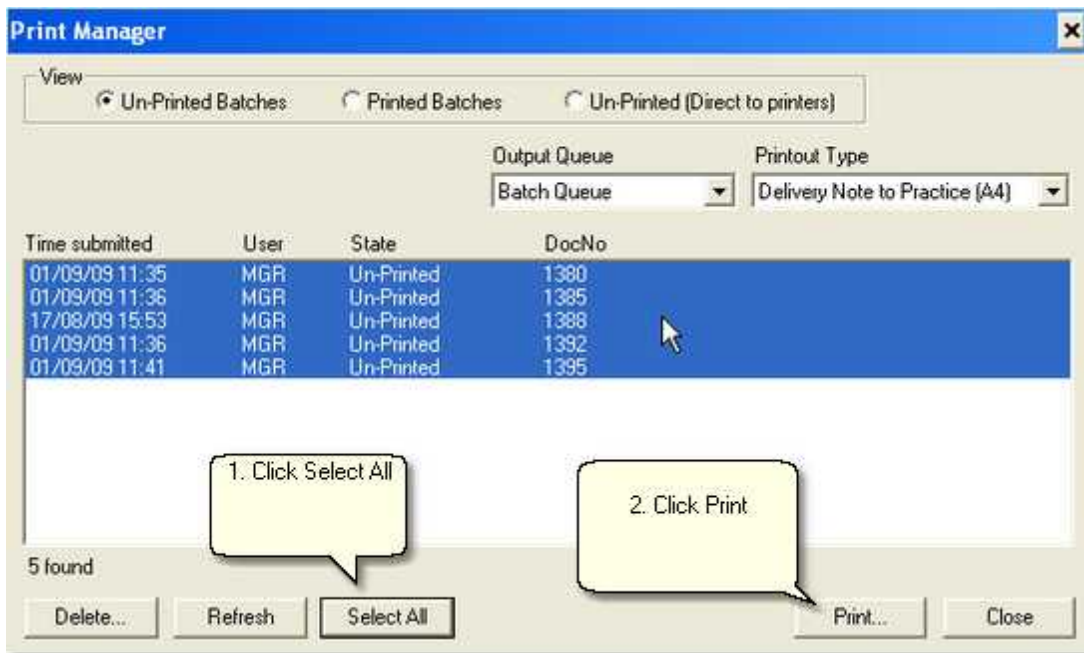
- To print a hard copy of the report, click the Printer icon on the Tool Bar.

Note: The above report is useful since it is effectively a Job Schedule showing booked in jobs by due date, the most urgent at the top. Some larger labs use this report on a daily basis, choosing the other flavor of this report specifying the due date in the report options.

Printing Despatch Notes to Practice

After a session of booking out jobs, we may want to print off the Despatch notes grouped by Dental Practice.

- From the Tools menu, choose Print Manager



Notice the View group box is set to Un-Printed Batches by default.

- Click Select All, then Print then Ok to see the Despatch notes in a Preview window (we won't print them to a physical printer now).

DELIVERY NOTE

Beresford Dental Practice
394 Old London Road
Hastings
East Sussex
TN35 5BL



DentaLab Limited
17 High Street
Barnham
East Sussex
TN33 9JG

Tel: 01424 777777
Email: sales@transactor.co.uk

TEL NO		TIME	D
01424 952675		11:47	1/9/2
SURGEON	DOC NO	PATIENT	JOB STATUS
Mr J Beresford BDS	1380	T Rawlings	Job Booked Out Charge
	1385	N Manning	Job Booked Out Charge
	1392	Smith	Job Booked Out Charge
	1395	Mr John Smith	Job Booked Out Charge

CHECKED BY: _____ ITEMS: 4

RECEIVED BY: _____

This is a custom-made dental appliance that has been manufactured to satisfy the all characteristic, properties and features specified by the prescriber for the above named patient. This appliance is intended for the exclusive use by this patient and conforms relevant essential requirements specified in Annex 1 of the Medical Devices Directive (93/42/EEC) and the United Kingdom Medical Devices Regulations SI 1994 No. 3017

KEEP AWAY FROM THE EXTREMITIES OF HEAT AND COLD

Notes

This report is very useful because the delivery driver will get one despatch note per Dental Practice even if several Surgeons are at that Practice. Also notice the Checked by and Received by signature areas.

If you prefer to keep Delivery Notes per job, or per Surgeon then then you can do this too. See the main Help.

10 Statements

In this topic we will preview (but not print out) Statements for All Surgeons for the example DentaLab

Limited.

Printing surgeon statements

- From the Reports menu, choose Surgeons - Statement (monthly)

Report: Statement (monthly)

Options

Surgeon A/c no. (or Profile name)

Month

Year

Properties

Page Format

Output to

For ALL surgeons leave Surgeon A/c number blank. Groups can be done by using Profile(s)

You'll get a few options but you can leave these as they are.

Notice in this example, that the Surgeon A/c no. box is blank; this means we'll get a Statement for all Surgeons.

If the Surgeon A/c no box is not blank, this is because there was a Surgeon showing on the Main Form when the Report menu was chosen; simply clear the 'Surgeon a/c no.' box.

- Confirm that the 'Output To' setting is 'Preview Window' then choose OK. Individual statements for all surgeons will be produced.

STATEMENT				DentaLab Limited	
July 2009				17 High Street Battle East Sussex TN33 0AE	
				Tel: 01424 775007 Email: sales@transactor.co.uk	
To:					
Mr B Adams BDS Cooden Dental Surgery 146 Cooden Sea Rd Bexhill-On-Sea East Sussex TN39 4SL					
A/c No				Printed	Page
328				5/8/2009	1 of 2
Date	Doc#	Description	Patient	Amount	Balance
		Balance brought forward			0.00
05/07/09	1232	Invoice	M Carter	54.50	54.50
05/07/09	1239	Invoice	Mr G Miller	65.90	120.40
05/07/09	1246	Invoice	C Black	58.50	178.90
05/07/09	1247	Invoice	M Fuller	62.50	241.40
06/07/09	1252	Invoice	Mr C Jackson	88.50	329.90
06/07/09	1253	Invoice	Mr D Whittington	97.30	427.20
07/07/09	1259	Invoice	Mr C Robinson	56.23	483.43
10/07/09	1264	Invoice	P Reece	62.03	545.46
11/07/09	1270	Invoice	J Evans	86.50	631.96
12/07/09	1277	Invoice	K Crowther	49.03	680.99
12/07/09	1278	Invoice	K Smith	25.00	705.99

- Click on the Next Page icon to step thru the Statements.



If we wanted to print these statements (from the Printer Icon shown above), we could either print all statements or specify the page number range.

- Close the Preview Window.

To produce a statement for an individual surgeon, either select a surgeon onto the Main Form before choosing the Report, or in the Report Options, type in the a/c number before clicking OK.

Try also...

Running some of the other reports. As long as you leave the 'Output to' box as it is, all reports will go to a preview window so you won't need to waste paper.

Try the Surgeon Summary Invoice report which summarises invoices for an individual surgeon

account and month with a grand total amount. Some labs use this instead of printing individual Invoices.

Try re-running the Statements but this time choose the Surgeon Statement (date Range). This means that the aged analysis at the bottom of the statement is 30/60/90 days rather than current month/1mth/2mth/3mth. You will see which type is more suitable for the way you deal with your surgeons.

11 What Next

That completes the Coffee Break Tour tutorial.

We recommend you now go to Start your live Transactor and Set up Transactor for your lab in the main help.

We hope you have enjoyed your experience with **Transactor** so far.

Please contact us if you have any questions.

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