

# Notes in Evolution

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# Notes in Evolution

\*\*\*FYI\*\*\* Notes will only print on forms/reports if the form/report is coded to include these notes.

## Global and Case Entry Preference Notes

In the **Doctors** form in the **Maintenance** menu under the **Main** tab, you can enter **Global Preferences** and **Case Entry Preferences**.

Select the Doctor and then enter the notes needed. Then click **Save**.

The screenshot shows the 'Doctors' form in the 'Maintenance' menu. The 'Main' tab is selected. The form displays a list of doctors on the left and a detailed form on the right. The 'Global Preferences' and 'Case Entry Preferences' sections are highlighted with red arrows. The 'Save' button is also highlighted with a red arrow.

| Last Name          | First N | MI | Acct | P |
|--------------------|---------|----|------|---|
| Adams              | Sheree  |    | 1008 |   |
| All Smiles         |         |    | 1033 |   |
| Atlanta Nu Smile   |         |    | 1005 |   |
| Baily Dental Cent  |         |    | 1026 |   |
| Campbell           | James   |    | 1027 |   |
| Daniels            | Zelda   |    | 1028 |   |
| Doe                | John    | P. | 1001 |   |
| Edger              | James   |    | 1029 |   |
| Fort               | Edwar   |    | 1009 |   |
| Gentle Dental Clin |         |    | 46   |   |
| Gentry             | Donald  |    | 1030 |   |
| Haller             | Brian   |    | 1007 |   |
| Inman              | Kathy   |    | 1031 | F |
| Jackson            | Curtis  |    | 1032 |   |
| Kasper             | Kathle  |    | 1010 |   |
| Kersey Dental La   |         |    | 1011 |   |
| Luna Happy Smil    |         |    | 1012 |   |
| McKeen             | Cindy   |    | 1013 |   |
| New Dental Clinic  |         |    | 1014 |   |
| North Georgia De   |         |    | 1006 |   |
| Olson              | Beth    |    | 47   |   |
| Omg                | Ima     |    | 1015 |   |
| Phelan             | Todd    |    | 1016 |   |
| Quinn              | Sheila  |    | 1017 | F |
| Riddle Dental Clin |         |    | 1018 |   |
| Rosenberry Denta   |         |    | 37R  |   |

**Global Preferences:**  
Path for this note: Maintenance > Doctors > Main (tab) > Global Preferences. These notes show up on the Touch screens for the case.

**Case Entry Preferences:**  
Path for this note: Maintenance > Doctors > Main (tab) > Case Entry Preferences. These notes show up on the "New Order" form to the Case Entry Person.

Track Tax Caps by Location

Change Status Delete Add New Save

- **Global Preferences:** These notes are intended to be included on the work ticket for every case for an account and may be printed work tickets and will display on the **EvoTouch** screen and in the **EvoTech App** for all steps.

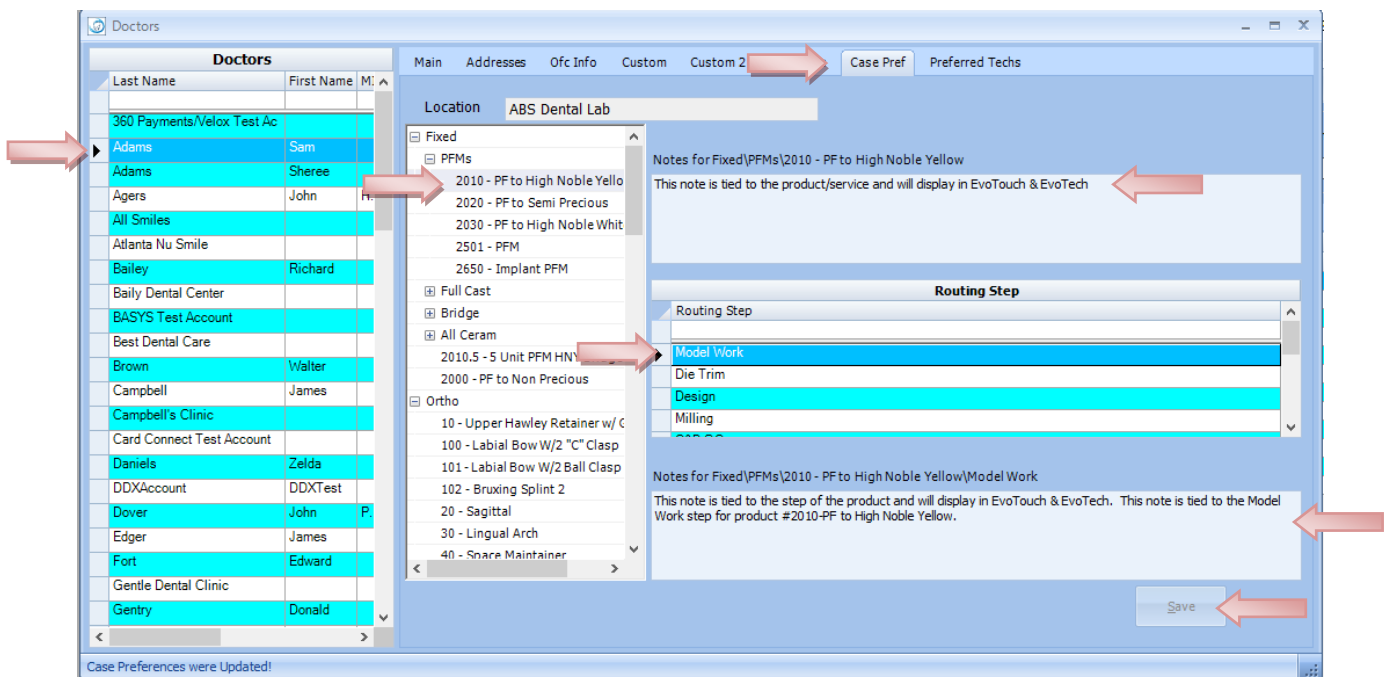
- **Case Entry Preferences:** These notes display on the **New Order** screen to case entry operators when the account is selected for case entry. These notes are meant to ensure that cases are entered correctly for an account. These notes **DO NOT** show up on the **EvoTouch** screens or in the **EvoTech App**.

## Account Preference Notes

These are detailed, technical notes concerning a specific step and/or service for how that account desires their work to be done. These notes print on work tickets and display on the touch screens to technicians. When the system finds a note for a step for an account within the department that step is tied to, it automatically includes the note as part of the case detail. Preferences can be entered for an account, by services; by service and step; by sales department. These notes are intended to make every work ticket for an account customized with that account's preferred technical processes and are applicable to the type of restoration for each case.

In the **Doctors** form of the **Maintenance** menu under the **Case Pref[erences]** tab is where you may enter these types of notes. For example, select a service/step and enter the appropriate notes for the way this doctor prefers this service/step to be completed or if certain materials, metals, etc are to be used. These notes will appear on the **EvoTouch** screen and in the **EvoTech App**.

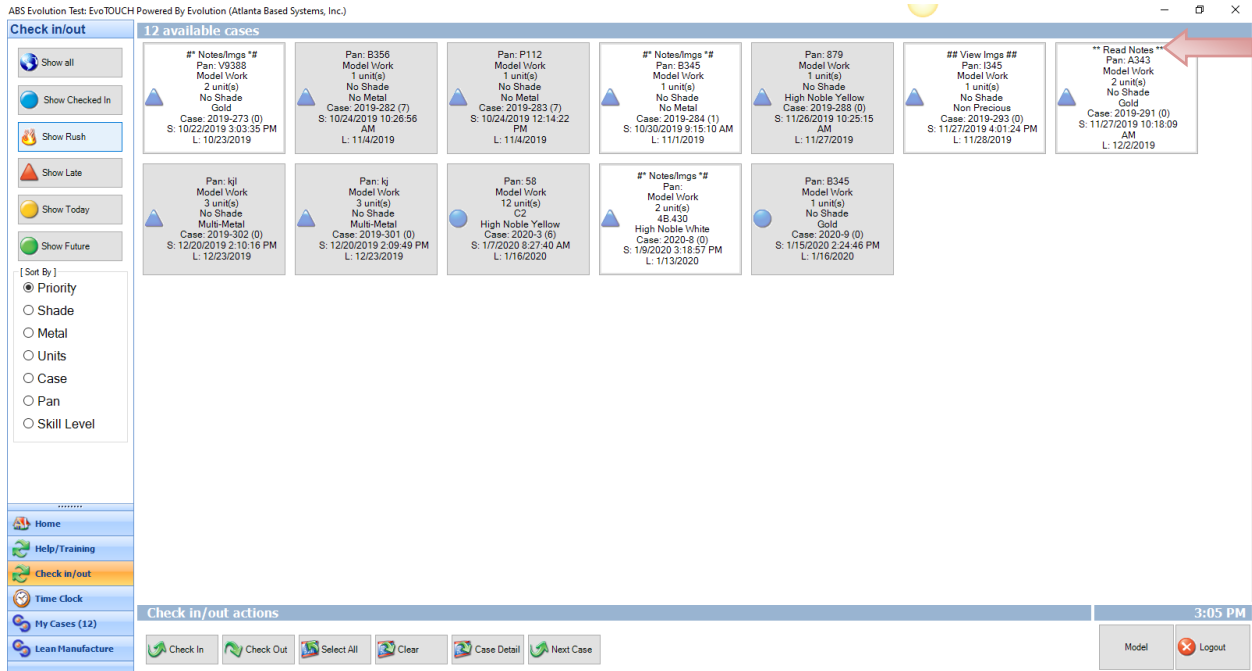
To associate a note with a specific service for the selected doctor, enter it in the text box located at the top of the form.



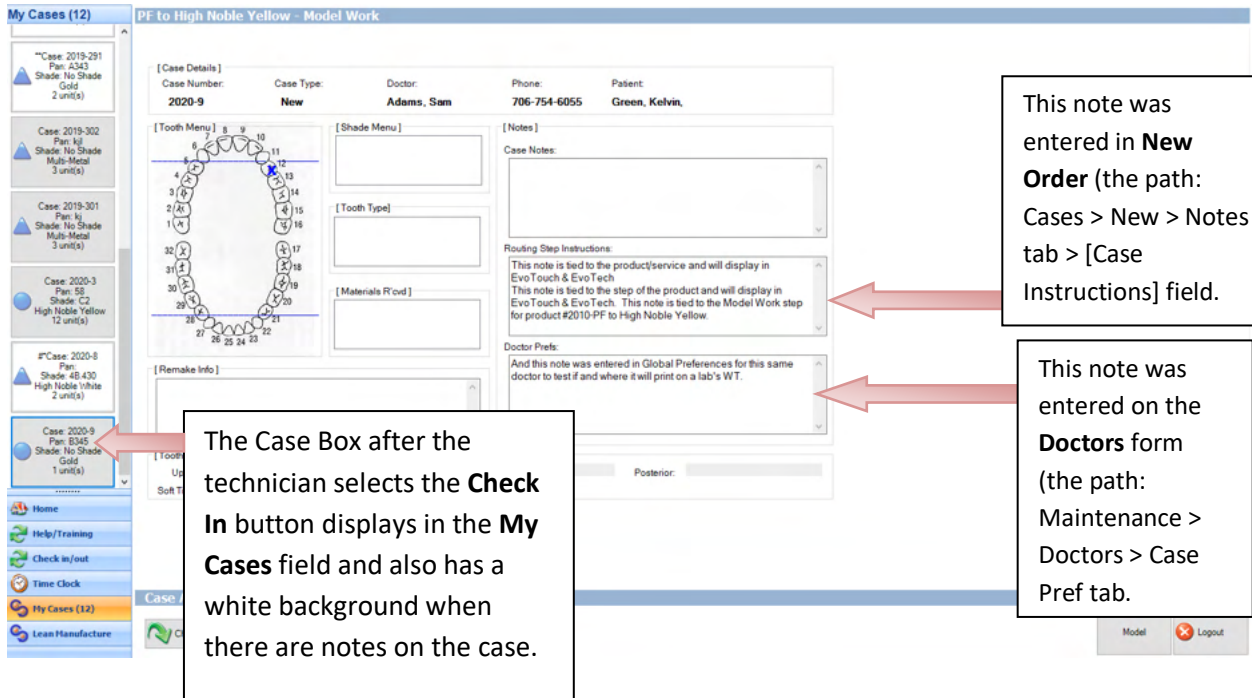
If you want a note tied to one of the steps associated with that service, select a step and enter the note in the text box located at the bottom of the form.

# Notes in Evolution

When there are notes on a case the Case Box Button states **\*\* Read Notes \*\*** and the box has a white background.



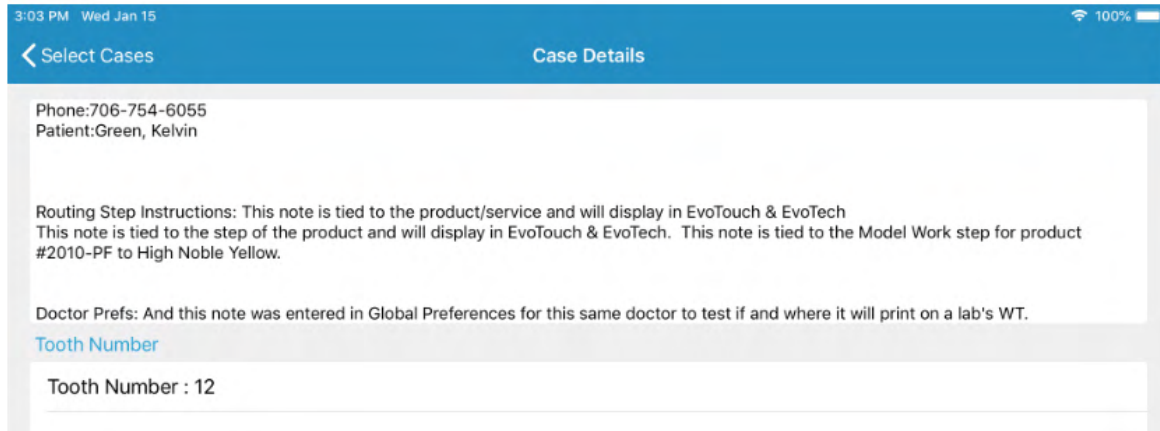
On tech touch screen select the case by clicking the case button and the details will appear on the screen.



# Notes in Evolution

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The notes will also display in the **EvoTech** app on the *Case Details* screen.



# Notes in Evolution

## Call Notes

Call Notes can be entered in **CRM** and **Case Inquiry** – these notes will display on the **Call Notes** tab in **Case Inquiry** and on techs touch screens under **Case Details**.

On the **Case Inquiry** form, select the **Call Notes** tab.

Case Inquiry

Start Date: 3/5/2017 OR Enter Invoice Number Add Images Dr: Fort Case #: 2017-00566 Clear Filters on Close

End Date: 6/5/2017 2017- Refresh Data Acct #: 1009 Pan #: P64 Acct Mgr:

Case List Case Info Schedule Steps **Call Notes** Invoices Tracking Tech Data Audit Data

**Call Notes History**

| Name          | Subject                    | Created Source |
|---------------|----------------------------|----------------|
| Administrator | 6/5/2017 Case Invoice Note |                |
| Administrator | 6/5/2017 Case Entry        |                |

**Call Note**

Here is a note for the case that is entered in New Order on the "Notes" tab and in the field called Case Instructions. This note appears to the technician on the Touch Screens and can print on a Work Ticket if the Work Ticket has been formatted to include them.

[Add New Note]

Subject: Careful w/ Margins

Activity Type: Call

Sub type:

Assign To: Administrator

Status: Started

Priority: High

Start: 6/5/2017 11:38 AM

Due: 6/6/2017 11:38 AM

End: 6/6/2017 11:38 AM

Save Note

A note can be entered by any person who uses Dynamic Data to a case when a Doctor calls or sends an email.

Dr: Fort Acct #: 1009 | Case #: 2017-00566 Pan #: P64

Enter and/or select the appropriate information on the left and then enter the note in the text box on the right and select **Save Note**.

# Notes in Evolution

Notice the note is now in the **Call Note** field and the **Call Notes History** grid displays the **Name** of the person who entered the note, the **Subject**, the **Created** date, and the **Source** is displayed as **Internal**. This case had a note entered during **Case Entry** too.

The screenshot shows the 'Case Inquiry' window with the 'Call Notes' tab selected. The 'Call Notes History' table lists three entries:

| Name          | Subject            | Created  | Source            |
|---------------|--------------------|----------|-------------------|
| Administrator | Careful w/ Margins | 6/5/2017 | Internal          |
| Administrator |                    | 6/5/2017 | Case Invoice Note |
| Administrator |                    | 6/5/2017 | Case Entry        |

The 'Call Note' field contains the text: "A note can be entered by any person who uses Dynamic Data to a case when a Doctor calls or sends an email." Below this is an 'Add New Note' form with fields for Subject, Activity Type (Call), Sub type, Assign To (Administrator), Status, Priority, Start, Due, and End, along with a 'Save Note' button.

# Notes in Evolution

In the CRM menu, select **Customer Service** in the **Activities** section:

Right click in the **Activities** grid and select **New Activity**.

The screenshot displays the CRM Customer Service interface. At the top, there are search fields for Account Number and Last Name, and a Search button. Below this, account details are shown: Acct Class: Dentist, Acct No: 1009, Sales Rank: 15. Doctor information includes Dr: Dr. Edward Fort, Dr Status: Active, and a checked box for Allow Case Entry. A bar chart on the right shows sales data for months 6 through 7, with a peak in month 3. The main section contains expandable tabs for Addresses (2), Cases (5), Invoices (10), and Activities (10). A red arrow points to the Activities tab. Below the tabs is a table with columns: Subject, Type, Sub Type, Status, Priority, Owner, Start Date, Due Date, End Date, Contact, Contact Type, and Desc. The first row is selected, and a context menu is open over it. The menu options are: New Activity (highlighted with a red arrow), CRM Account Activity, Send eMail to Edward Fort (Account # 1009), Refresh Data, Show All Activities, Clear All Filters, and Clear All Sorting. Below the table, there are fields for Subject (Careful w/ Margins), Type (Call), Sub Type, Status (Started), Priority (High), Assigned To (Administrator), and Address (Primary Address- TF). A Save button is located at the bottom right of the form area. At the very bottom, there are tabs for Sales Team Info and Custom.

# Notes in Evolution

Enter the Subject, Type, Sub Type, Status, etc. as appropriate in the proper fields. Then type the note in the text box at the bottom of the section. Click **Save**.

CRM: Customer Service

Account Number: [ ] Last Name: [ ] Search [ ]

Acct Class: Dentist Acct No: 1009 Sales Rank: 15

Dr: Dr. Edward Fort

Practice Name: [ ] Dr Status: Active

Web Site: [ ]  Allow Case Entry

Addresses (2)

Cases (5)

Invoices (10)

Activities (11)

| Subject | Type              | Sub Type | Status | Priority | Owner         | Start Date | Due Date | End Date | Contact | Contact Type | Desc |
|---------|-------------------|----------|--------|----------|---------------|------------|----------|----------|---------|--------------|------|
|         | Case Note         |          |        |          |               |            |          |          |         |              |      |
|         | Case Note         |          |        |          |               |            |          |          |         |              |      |
|         | Support           |          |        |          |               |            |          |          |         |              |      |
|         | Case Invoice Note |          |        |          |               |            |          |          |         |              |      |
|         | Case Note         |          |        |          |               |            |          |          |         |              |      |
|         | Call              |          |        |          | Administrator |            |          |          |         |              |      |

Subject: Case Note entered in CRM Description: ase Notes entered in CRM Importance... Case Number: 2017-00566

Type: Call Start Date: 6/5/2017 12:00 AM Case Patient: Robert Woodward

Sub Type: [ ] Due Date: 6/6/2017 12:00 AM Case Location: ABS Dental Lab

Status: Started End Date: 6/6/2017 12:00 AM

Priority: High Address: Primary Address- TF

Assigned To: Administrator Contact: [ ]

This note was entered in CRM Customer Service.

Save

Sales Team Info

Custom

The note then appears in **Case Inquiry** on the **Call Notes** tab for that case.

Case Inquiry

Start Date: 3/5/2017 OR Enter Invoice Number Add Images Dr: Fort Case #: 2017-00566 Clear Filters on Close

End Date: 6/5/2017 2017- Refresh Data Acct #: 1009 Pan #: P64 Acct Mgr: [ ]

Case List Case Info Schedule Steps Implants **Call Notes** Tracking Tech Data Audit Data

Call Notes History

| Name          | Subject                  | Created  | Source    |
|---------------|--------------------------|----------|-----------|
| Administrator | Case Note entered in CRM | 6/5/2017 | Internal  |
| Administrator | Careful w/ Margins       | 6/5/2017 | Internal  |
| Administrator | 6/5/2017 Case Invc       | 6/5/2017 | Case Invc |
| Administrator | 6/5/2017 Case Entr       | 6/5/2017 | Case Entr |

Call Note

This note was entered in CRM Customer Service.

# Notes in Evolution

Notice the **Case Notes:** field on the technician's touch screen now includes the 2 notes input on the same case from **CRM Customer Service** and from the **Case Inquiry Call Notes** tab.

ABS Evolution Test: EvoTOUCH Powered By Evolution (Atlanta Based Systems, Inc.)

My Cases (8)

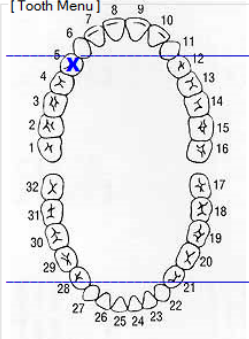
Porcelain Fused to Semi Precious - Model Work

RUSH

[ Case Details ]

|              |            |              |              |                   |
|--------------|------------|--------------|--------------|-------------------|
| Case Number: | Case Type: | Doctor:      | Phone:       | Patient:          |
| 2017-566     | New        | Fort. Edward | 310-666-1200 | Woodward, Robert. |

[ Tooth Menu ]



[ Shade Menu ]

5-Vivadent PE-01

[ Notes ]

Case Notes:

them.  
 Administrator -- 6/5/2017 11:49:14 AM  
 This note was entered in CRM Customer Service.  
 Administrator -- 6/5/2017 11:40:43 AM  
 A note can be entered by any person who uses Dynamic Data to a case when a Doctor calls or sends an email.

[ Materials R'cvd ]

- 1-Master Model
- 1-Bite
- 1-Shade Tab
- 1-Casting

[ Remake Info ]

[ Tooth Mold / Soft Tissue Shade ]

Upper Anterior:  Lower Anterior:  Posterior:

Soft Tissue Shade:

Case Actions

11:51 AM

Check Out

Add Metal

Case Images

Add Image

Print Work Ticket

Sissy Lewis

Logout

# Notes in Evolution

## Case Instruction Notes

These notes are added at Case Entry time. These notes will appear in *EvoTouch* on the tech touch screen, in the *EvoTech* app, and can print on the Work Ticket. These notes are intended to be specific to each case and will either override or enhance predefined preferences.

Case Instructions notes are entered on the **Notes** tab in **New Order**.

The screenshot displays the 'New Order' software interface. The top section contains various input fields and buttons for case management, including 'Doctor', 'Shipping', 'Patient Details', and 'Case Type'. A calendar widget shows the date 6/5/2017. The 'Notes' tab is selected, and a 'Case Instructions' field contains a sample note. A red arrow points to the 'Notes' tab, and another red arrow points to the 'Case Instructions' field.

**Case Instructions**

Here is a note for the case that is entered in New Order on the "Notes" tab and in the field called Case Instructions. This note appears to the technician on the Touch Screens and can print on a Work Ticket if the Work Ticket has been formatted to include them.

# Notes in Evolution

## Notes for Step

Notes for a **Step** are entered on the **Notes** tab in **New Order** below the **Step** grid. The user must first select the correct step from this grid which will turn the line a dark blue, then enter the note in the **Notes for Step:** box below the grid. These notes appear on the tech touch screen.

Select the step from the **Step** grid that you want to associate a note. Enter the note in the **Notes for Step** section. Click **Save**.

**New Order**

[ Doctor ]  
Acct Num: [ Search ] 2017- [ Retrieve Case ]

Dr: Fort, Edward (1009)  Call Requested

[ Shipping ]  
\*Addr: 6281 Bristol Parkway Tallulah Falls, GA 30573 Ship Time: 10:00 AM  
Carrier: Local Delivery  Rush Order  
Required Out of Lab by: 6/8/2017 8:00 AM

[ Patient Details ]  
First Name: Robert MI Last Name: Woodward  
Age: [ ]  Male  Female Cases (0)

[ Tooth Mold ]  
Upper Anterior Lower Anterior Posterior  
[ Try In ]  
 Try In Required  
Try In Lead Time: 0 days

[ Case Type ]  
 New  Continuation  
 Remake  Repair

[ Delivery Due Date ]  
June, 2017  
Sun Mon Tue Wed Thu Fri Sat  
28 29 30 31 1 2 3  
4 5 6 7 8 9 10  
11 12 13 14 15 16 17  
18 19 20 21 22 23 24  
25 26 27 28 29 30 1  
2 3 4 5 6 7 8  
Today: 6/5/2017

[ Original (RX) Due Date ]  
Day: 08 or Date: 6/8/2017  
 No Due Date

[ Patients Appointment ]  
To: Edward Fort  
Phone: 310-666-1200  
Fax: 310-666-1201  
Cell:  
eMail:  
6281 Bristol Parkway  
Tallulah Falls, GA 30573

[ Case Guarantee ]  
 No Guarantee

Order Summary  
3 Cases On Hold  
1 Case Estimates

Services **Notes** Implants View Schedule

Route Step Notes

| Service               | Step                        |
|-----------------------|-----------------------------|
| Porcelain Fused to Se | Model Work                  |
|                       | Die Trim                    |
|                       | Wax Post/Reduction Coping   |
|                       | Cast Post/Reduction Coping  |
|                       | Metal Finish Post/Red. Copi |
|                       | C&B QC                      |
|                       | Opaque                      |
|                       | Stain & Glaze               |
|                       | Metal S                     |
|                       | Metal F                     |

Notes For Step  
This note is specifically fo the Die Trim step for this specific case and will show up on the Touch Screens too.

Save

[ Case Notes ]  
Case Instructions Invoice Operator Notes  
Here is a note for the case that is entered in New Order on the "Notes" tab and in the field called Case Instructions. This note appears to the technician on the Touch Screens and can print on a Work Ticket if the Work Ticket has been formatted to include them.

## Notes in Evolution

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The **Case Instructions** note is displayed in *EvoTouch* on the tech touch screen and *EvoTech* app for that case in the **Case Notes:** box.

[ Notes ]

Case Notes:

Administrator -- 6/5/2017 11:22:16 AM  
Here is a note for the case that is entered in New Order on the "Notes" tab and in the field called Case Instructions. This note appears to the technician on the Touch Screens and can print on a Work Ticket if the Work Ticket has been formatted to include them.

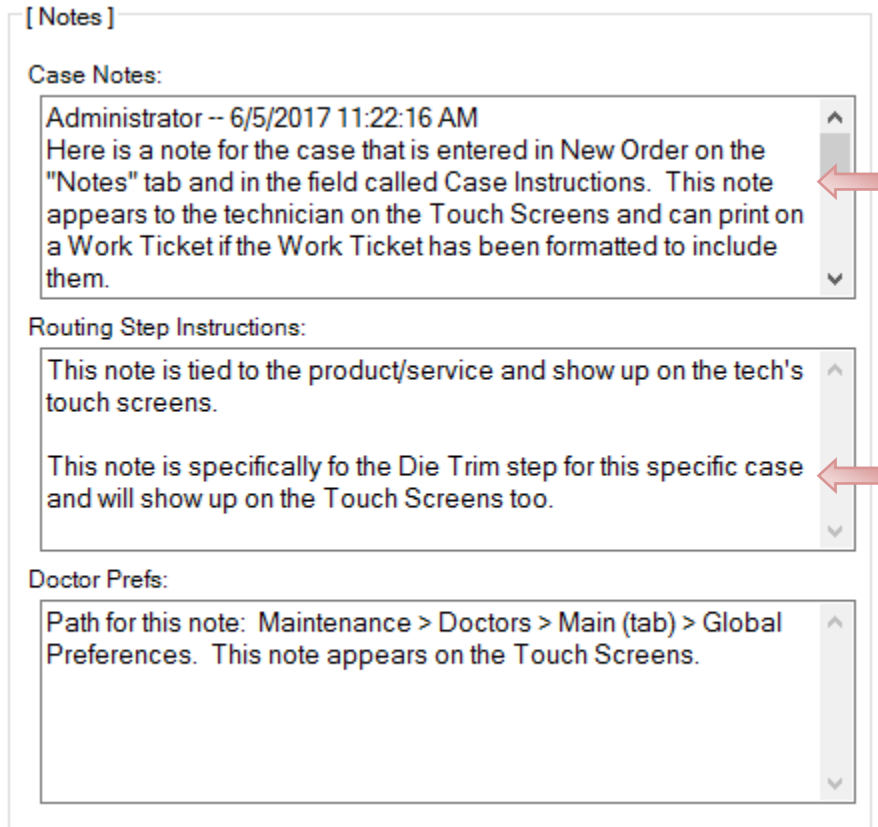
Routing Step Instructions:

This note is tied to the product/service and show up on the tech's touch screens.

This note is specifically fo the Die Trim step for this specific case and will show up on the Touch Screens too.

Doctor Prefs:

Path for this note: Maintenance > Doctors > Main (tab) > Global Preferences. This note appears on the Touch Screens.



The **Notes For Step** note is displayed on the *EvoTouch* screen, **Routing Step Instructions:** box and in the *EvoTech* app for that case.

# Notes in Evolution

## Case Invoice Notes

A note can be added in **New Order** specifically for the case for the Invoice operator to see when they invoice the case.

The screenshot displays the 'New Order' window with the following sections:

- [ Doctor ]**: Acct Num: 2017-566, Retrieve Case, Dr: Fort, Edward (1009), Call Requested.
- [ Shipping ]**: \*Addr: 6281 Bristol Parkway Tallulah Falls, GA 30573, Ship Time: 10:00 AM, Carrier: Local Delivery, Rush Order, Required Out of Lab by: 6/8/2017 8:00 AM.
- [ Patient Details ]**: First Name: Robert, MI, Last Name: Woodward, Age, Male, Female, Cases.
- [ Tooth Mold ]**: Upper Anterior, Lower Anterior, Posterior, [ Try In ] Try In Required, Try In Lead Time: 0 days.
- [ Case Guarantee ]**: No Guarantee.
- [ Delivery Due Date ]**: Calendar for June 2017, Today: 6/5/2017.
- [ Original (RX) Due Date ]**: Day 8 or Date 6/8/2017, No Due Date.
- [ Patients Appointment ]**: To: Edward Fort, Phone: 310-666-1200, Fax: 310-666-1201, Cell, eMail, 6281 Bristol Parkway Tallulah Falls, GA 30573.
- [ Case Type ]**: New, Continuation, Remake, Repair.
- [ Case Shade ]**: Local, Case Origin: Local, Acct Mgr: [blank].
- [ Soft Tissue Shade ]**: [blank]
- [ Case Shade ]**: [blank]
- [ Order Summary ]**: 3 Cases On Hold, 1 Case Estimates.

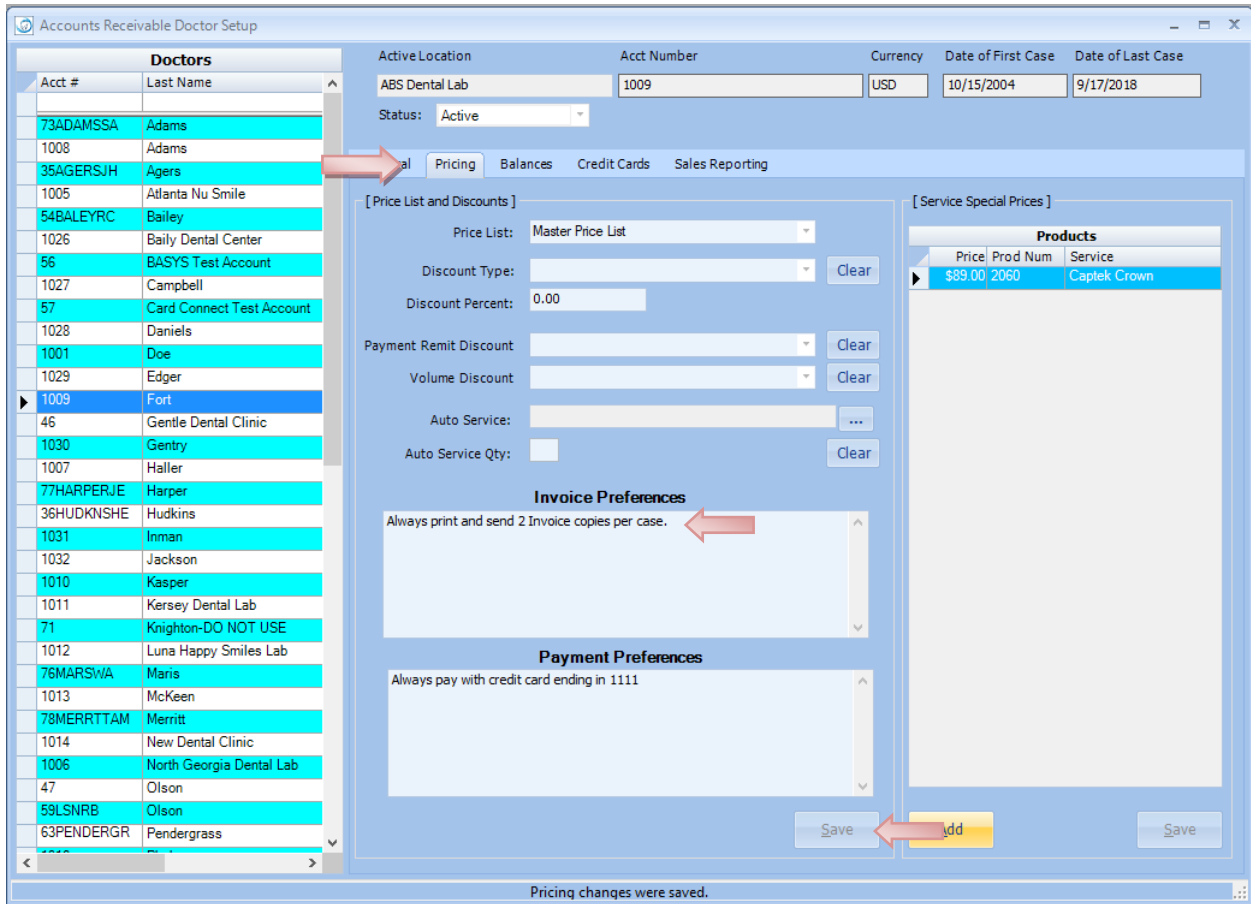
The **Notes** tab is active, showing:

- Route Step Notes**: Service: Porcelain Fused to Se, Step: Model Work, Die Trim, Wax Post/Reduction Coping, Cast Post/Reduction Coping, Metal Finish Post/Red. Copi, C&B QC, Opaque, Stain & Glaze. Notes For Step: [blank].
- [ Case Notes ]**: Case Instructions, Invoice Operator Notes (highlighted with a red arrow). Text: This note was entered in New Order on the Invoice Operator Notes tab of the Notes (Main tab). This note appears to the person who invoices the case.

## Invoice Preferences

These notes display on the Pre-Invoicing and Invoicing forms to invoicing operators when an invoice is processed for an account. These notes are intended to ensure each account is invoiced correctly.

**Invoice Preferences** are entered on the **Pricing** tab of the **Doctor A/R Setup** form of the **A/R** menu. Once the note has been entered in the **Invoice Preferences** box click **Save**.



# Notes in Evolution

When a note is added in the **Invoice Operator Notes** field of **New Order** and when a case is invoiced for a doctor with an **Invoice Preferences** note it will appear in the **Operator Notes** box of the **Invoicing** form of the **A/R** menu. Notice how the note is identified as well.

The screenshot displays the 'Invoicing' window with the following sections:

- [Invoice Info]:** Case # 2017-566, Invoice Date: 6/5/2017, Active Location: ABS Dental Lab, Dr. Status: Active.
- [Bill To Info]:** Dr. Edward Fort, 6281 Bristol Parkway, Tallulah Falls, GA 30573.
- [Ship To Info]:** Dr. Edward Fort, 6281 Bristol Parkway, Tallulah Falls, GA 30573.
- [Case Info]:** Pan Number: P64, Doctor Due Date: 6/8/2017, Shipping Due Date: 6/8/2017 10:00 AM, Shipping Type: Local Delivery, Patient Name: Robert Woodward.
- [Services]:** Type Product # and Press <Enter>, Double-Click to Add. Categories: Fixed, Ortho, Removable, Sundry, Metals.
- Summary:** Credit Limit: n/a, Current Balance: \$2,417.76, Past Due (>30 Days): \$2,382.53.
- Service Line Items to be Invoiced:**

| Selected                            | Edit | Prod # | Service                    | Units | Ant Units | Ant Surcharge | Price   | Extended | Rem % | Disc % | Net     | Tax % | MDT    | Total   | CP | CP |
|-------------------------------------|------|--------|----------------------------|-------|-----------|---------------|---------|----------|-------|--------|---------|-------|--------|---------|----|----|
| <input checked="" type="checkbox"/> | L    | 2020   | Porcelain Fused to Semi Pr | 1.00  | 0.00      | \$0.00        | \$110.0 | \$110.00 | 0.00  | 0.00   | \$110.0 | 2.00% | \$0.00 | \$112.2 |    |    |
| <input checked="" type="checkbox"/> | L    | ME1    | MetalSemi Precious         | 0.00  |           | \$0.00        | \$50.00 | \$0.00   | 0.00  |        | \$0.00  | 2.00% | \$0.00 | \$0.00  |    |    |
- Operator Notes:**
  - Case Invoice Note:** This note was entered in New Order on the Invoice Operator Notes tab of the Notes (Main tab). This note appears to the person who invoices the case.
  - Invoice Preferences:** Always print and send 2 Invoice copies per case.
- [Invoice Totals]:** Values are in: USD
 

|                      |                 |
|----------------------|-----------------|
| Extended Total       | \$110.00        |
| Discounts            | \$0.00          |
| Remakes              | \$0.00          |
| Coupon               | \$0.00          |
| <b>Net</b>           | <b>\$110.00</b> |
| Sales Tax            | \$2.20          |
| Medical Device Tax   | \$0.00          |
| <b>Invoice Total</b> | <b>\$112.20</b> |
- [Actions]:** Save, Invoice, Invoice and Print, Credit Memo, New Invoice, Delete Invoice.

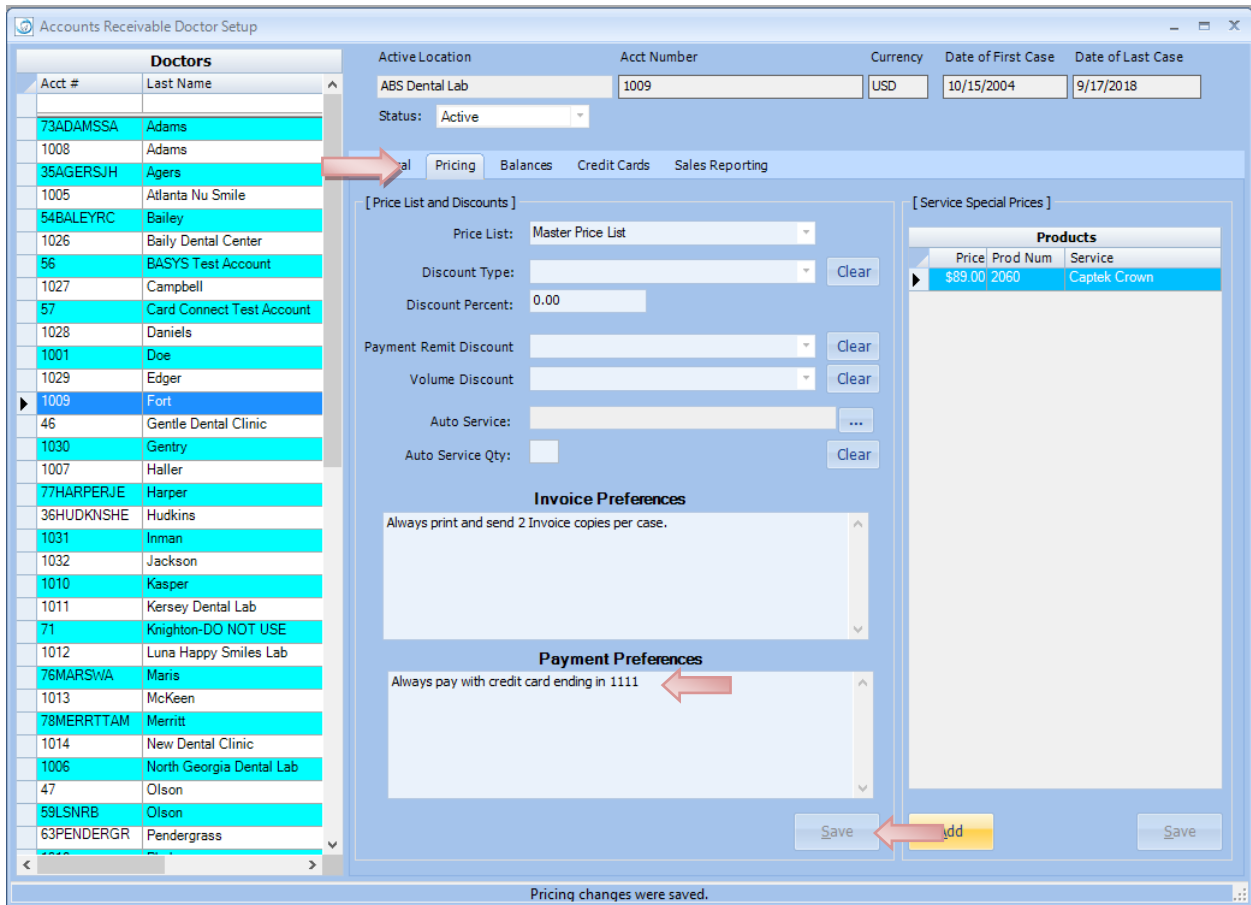
Additional text at the bottom: "Please remember that our lab will be closed Memorial Day - May 29th." and "Service Line Items were Loaded."

# Notes in Evolution

## Payment Preferences

These notes display on the **Payment Entry** form to payment entry operators when they are entering payments for an account with these notes setup. These notes are intended to ensure payments are entered correctly for each account.

**Payment Preferences** are entered on the **Pricing** tab of the **Doctor A/R Setup** form of the **A/R** menu. Once the note has been entered in the **Payment Preferences** box click **Save**.



# Notes in Evolution

When the account is selected from the **Doctors** grid of the **Payment Entry** form under the **A/R** menu, the note is displayed in the **Payment Operator Notes** field.

**[Payment Date]**

Payment Date: 9/17/2018

Total Payments for this Day: \$0.00

**Active Location**

ABS Dental Lab

Payment History

**[Payment Info]**

Amount: USD **Remaining Amount**

Ck/CC Number\*

Payment Type: Payment (Cash/Checks) Credit: Authorize ...

Notes

**[Aging Totals]**

|               |            |   |                        |
|---------------|------------|---|------------------------|
| USD Balance   | \$1,607.15 | / | \$1,607.15             |
| USD Value     | \$1,607.15 | / | \$1,607.15             |
| Unapplied Pay | \$0.00     |   |                        |
| Current       | \$0.00     |   | <b>Period Invoices</b> |
| 30 days       | \$22.08    |   | \$0.00                 |
| 60 days       | \$237.00   |   | <b>Period Payments</b> |
| 90 days       | \$18.81    |   | \$0.00                 |
| 120 days      | \$18.81    |   |                        |
| 150+ days     | \$1,310.45 |   |                        |

**Doctors**

| Last                   | First    | Account #  |
|------------------------|----------|------------|
| Adams                  | Sam      | 73ADAMSSA  |
| Adams                  | Sheree   | 1008       |
| Agers                  | John     | 35AGERSJH  |
| Atlanta Nu Smile       |          | 1005       |
| Bailey                 | Richard  | 54BALEYRC  |
| Baily Dental Center    |          | 1026       |
| BASYS Test Account     |          | 56         |
| Campbell               | James    | 1027       |
| Card Connect Test Acco |          | 57         |
| Daniels                | Zelda    | 1028       |
| Fort                   | Edward   | 1009       |
| Gentle Dental Clinic   |          | 46         |
| Gentry                 | Donald   | 1030       |
| Haller                 | Brian    | 1007       |
| Harper                 | Jeanie   | 77HARPERJE |
| Hudkins                | Heather  | 36HUDKNSHE |
| Inman                  | Kathy    | 1031       |
| Jackson                | Curtis   | 1032       |
| Kasper                 | Kathleen | 1010       |
| Kersey Dental Lab      |          | 1011       |
| Knighton-DO NOT USE    | Barbara  | 71         |

Account Status: Active

Acct No: 1009  
Dr. Edward Fort

6280 Bristol Parkway  
Suite 12  
Tallulah Falls, GA 30573

Optional: Distribute Oldest to Newest Apply

Payment Operator Notes

Always pay with credit card ending in 1111

Distribute Payments To

All  Current  30 Day  60 Day

90 Day  120 Day  150+ Day

**Unpaid Invoices**

| Case #   | Type           | Invoice # | Inv Date  | First Name | MI | Last Name | Amount   | Balance  | Payment Amt | Dr Acct# | Dr Li |
|----------|----------------|-----------|-----------|------------|----|-----------|----------|----------|-------------|----------|-------|
| 2018-22  | Invoice        | 2018-53   | 1/12/2018 | Jim        |    | Evans     | \$70.20  | \$70.20  | \$0.00      | 1009     | Fort  |
| 2017-674 | Invoice        | 2018-57   | 1/12/2018 |            |    | Henson    | \$340.00 | \$340.00 | \$0.00      | 1009     | Fort  |
| 2017-557 | Invoice        | 2018-74   | 1/15/2018 |            |    | Smith     | \$159.12 | \$159.12 | \$0.00      | 1009     | Fort  |
| 2017-557 | Invoice        | 2018-78   | 1/15/2018 |            |    | Smith     | \$57.20  | \$57.20  | \$0.00      | 1009     | Fort  |
| 2017-607 | Invoice        | 2018-79   | 1/15/2018 |            |    | Testing   | \$458.50 | \$458.50 | \$0.00      | 1009     | Fort  |
| 2017-566 | Invoice        | 2018-99   | 1/18/2018 | Robert     |    | Woodward  | \$169.00 | \$169.00 | \$0.00      | 1009     | Fort  |
|          | Service Charge | 2018-190  | 2/28/2018 |            |    |           | \$18.81  | \$18.81  | \$0.00      | 1009     | Fort  |
|          | Service Charge | 2018-221  | 3/31/2018 |            |    |           | \$18.81  | \$18.81  | \$0.00      | 1009     | Fort  |
|          | Service Charge | 2018-301  | 4/30/2018 |            |    |           | \$18.81  | \$18.81  | \$0.00      | 1009     | Fort  |
|          | Service Charge | 2018-360  | 5/31/2018 |            |    |           | \$18.81  | \$18.81  | \$0.00      | 1009     | Fort  |
|          | Service Charge | 2018-430  | 6/30/2018 |            |    |           | \$18.81  | \$18.81  | \$0.00      | 1009     | Fort  |

**Unapplied Payments**

| Pay Id | Date Paid | Check | Amount | Balance | Notes |
|--------|-----------|-------|--------|---------|-------|
|        |           |       |        |         |       |

Credit Limit: \$0.00 | Current Balance: \$1,607.15

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# Notes in Evolution

## Print Notes

**Print Notes** are entered on the **Invoicing** form and will print on **THIS** invoice only. These are free-form notes for specific invoices. Enter note in the **Print Notes** field. Click **Save**.

The screenshot shows the Invoicing software interface. At the top, it displays 'Invoicing (Form Opened On 4/22/2016 3:56 PM)'. The interface is divided into several sections:

- [Invoice Info]**: Case # 2016-306, Invoice Date: 4/22/2016, Active Location: Greater Dental Lab, Dr. Status: Active.
- [Bill To Info]**: Dr. Greg Alford, 3812 Central Avenue, Suite 1 J, Clarkesville, GA 30523.
- [Ship To Info]**: Dr. Greg Alford, 3812 Central Avenue, Suite 1 J, Clarkesville, GA 30523.
- [Case Info]**: Pan Number: T545, Doctor Due Date: 5/5/2016, Shipping Due Date: 5/5/2016 8:00 AM, Shipping Type: BETH, Patient Name: Bobby Rhodes.

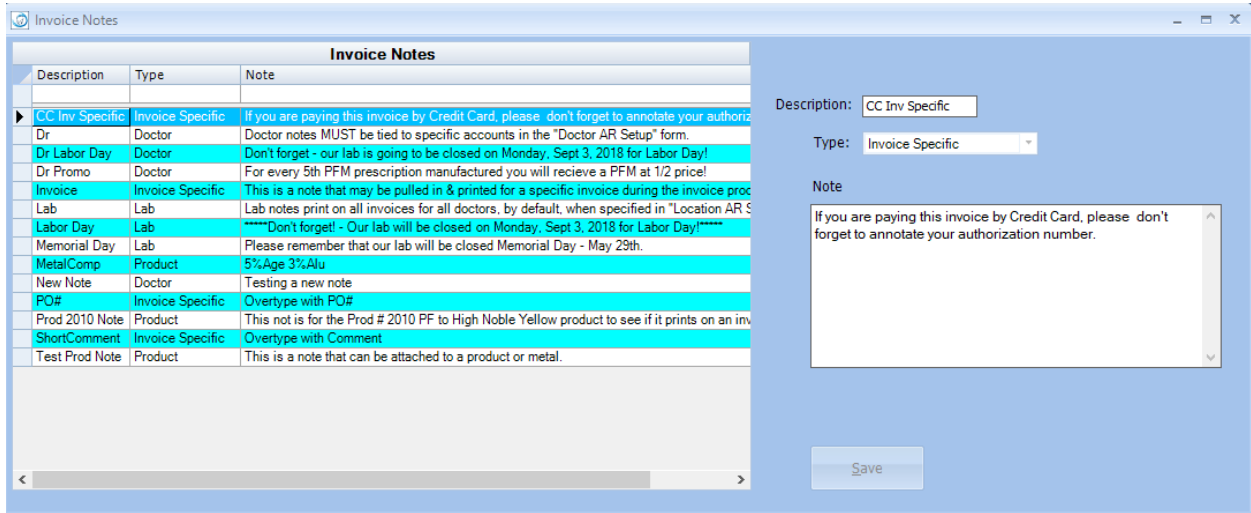
Below these sections, there is a summary bar showing 'Credit Limit: n/a', 'Current Balance: \$2,277.57', and 'Past Due (>30 Days): \$554.23'. A table titled 'Service Line Items to be Invoiced' lists two items:

| Selected                            | Edit | Prod #  | Service                            | Units | Ant Units | Ant Surcharge | Price    | Extended | Rem % | Disc % | Net      | Tax % | MDT    | Total    |
|-------------------------------------|------|---------|------------------------------------|-------|-----------|---------------|----------|----------|-------|--------|----------|-------|--------|----------|
| <input checked="" type="checkbox"/> |      | L 101   | Porcelain Fused to Semi-Precious C | 3.00  | 1.00      | \$9.00        | \$107.10 | \$330.30 | 0.00  | 0.00   | \$330.30 |       |        | \$357.59 |
| <input checked="" type="checkbox"/> |      | L M0016 | Metal\Special New                  | 0.00  |           | \$0.00        | \$34.65  | \$0.00   | 0.00  | 0.00   | \$0.00   | 8.262 | \$0.00 | \$0.00   |

The 'Print Notes' tab is selected, showing a text area with the placeholder text: 'This is an area where a note can be entered specific to this invoice.' A red arrow points to this text area. To the right, the 'Invoice Totals' section shows 'Values are in: USD' and a list of totals: Extended Total (\$330.30), Discounts (\$0.00), Remakes (\$0.00), Coupon (\$0.00), Net (\$330.30), Sales Tax (\$27.29), Medical Device Tax (\$0.00), and Invoice Total (\$357.59). A red arrow points to the 'Save' button in the 'Actions' section.

# Notes in Evolution

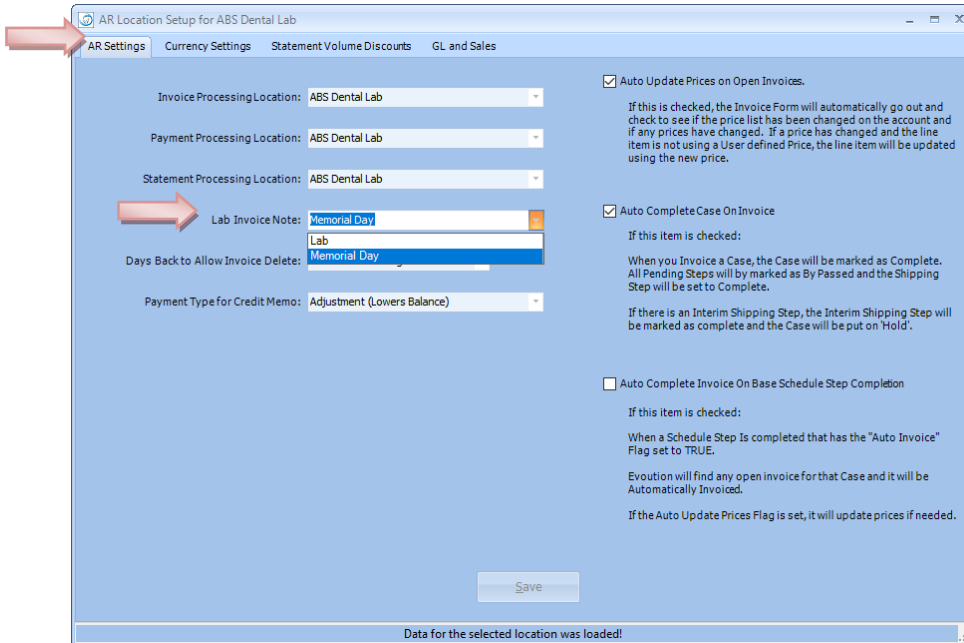
## Invoice Notes



Invoice Print Notes are pre-defined in the A/R > **Invoice Notes** form. There are four types of pre-defined invoice notes:

### Lab

These notes are tied to the invoice form and print on all invoices for all accounts. These notes are selected on the **Lab A/R Setup** form of the **AR Settings** tab.



# Notes in Evolution

They may also be selected or changed on the **Invoicing** form itself (**Set Global Inv Note** button).

The screenshot shows the 'Invoicing' window with the following details:

- [Invoice Info]**: Case # 2016-306, Invoice Date: 4/22/2016, Active Location: Greater Dental Lab, Dr. Status: Active.
- [Bill To Info]**: Dr. Greg Alford, 3812 Central Avenue, Suite 1 J, Clarkesville, GA 30523.
- [Ship To Info]**: Dr. Greg Alford, 3812 Central Avenue, Suite 1 J, Clarkesville, GA 30523.
- [Case Info]**: Pan Number: T545, Doctor Due Date: 5/5/2016, Shipping Due Date: 5/5/2016 8:00 AM, Shipping Type: BETH, Patient Name: Bobby Rhodes.
- Financials**: Credit Limit: n/a, Current Balance: \$2,277.57, Past Due (>30 Days): \$554.23.
- Service Line Items to be Invoiced**:
 

| Selected                            | Edit | Prod #  | Service                            | Units | Ant Units | Ant Surcharge | Price    | Extended | Rem % | Disc % | Net      | Tax % | MDT    | Total    |
|-------------------------------------|------|---------|------------------------------------|-------|-----------|---------------|----------|----------|-------|--------|----------|-------|--------|----------|
| <input checked="" type="checkbox"/> |      | L 101   | Porcelain Fused to Semi-Precious C | 3.00  | 1.00      | \$3.00        | \$107.10 | \$330.30 | 0.00  | 0.00   | \$330.30 |       | \$0.00 | \$357.59 |
| <input checked="" type="checkbox"/> |      | L M0016 | Metal\Special New                  | 0.00  |           | \$0.00        | \$34.65  | \$0.00   | 0.00  | 0.00   | \$0.00   |       | 8.262  | \$0.00   |
- Invoice Info**: Print Notes, Operator Notes, Tooth Mold.
- [Invoice Totals]**: Values are in: USD. Extended Total: \$330.30, Discounts: \$0.00, Remakes: \$0.00, Coupon: \$0.00, Net: \$330.30, Sales Tax: \$27.29, Medical Device Tax: \$0.00, Invoice Total: \$357.59.
- [Actions]**: Save, Invoice, Invoice and Print, Credit Memo, New Invoice, Delete Invoice.
- Buttons**: Test Global Invoice Note, Set Global Inv Note (highlighted with a red arrow).

A window pops up giving the user the ability to choose and view the note.

The 'Invoice Notes' dialog box displays a list of notes with the following columns: Description, Type, and Note. The 'Labor Day' note is selected and highlighted with a red arrow. The note text is: "\*\*\*\*\*Don't forget! - Our lab will be closed on Monday for Labor Day!\*\*\*\*\*". A red arrow points to the 'Save' button at the bottom right.

Then click **Save**.

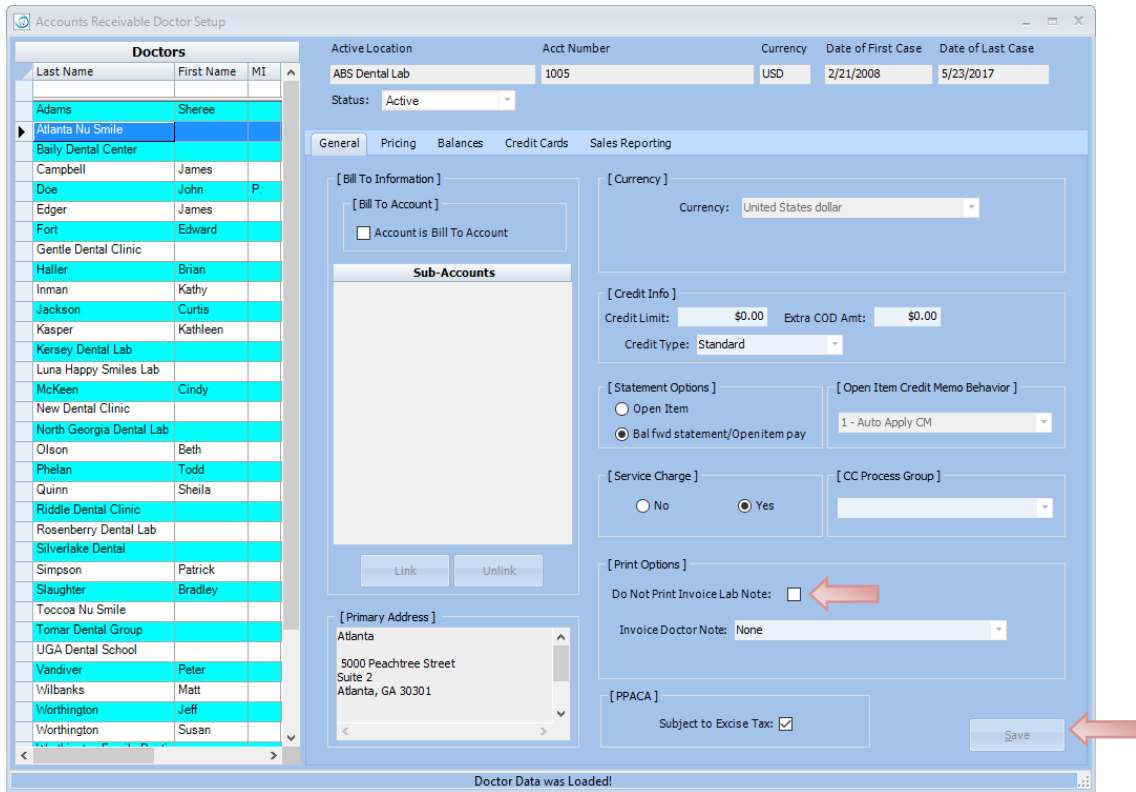
The 'Invoice Options' dialog box shows the 'Select Note For Invoice' dropdown menu set to 'Labor Day'. The note text is visible in the adjacent text area. A red arrow points to the 'Save' button at the bottom right.

The note is now the note that will print on every invoice.

The screenshot shows the 'Invoicing' window with the 'Set Global Inv Note' button highlighted by a red arrow. The note text "\*\*\*\*\*Don't forget! - Our lab will be closed on Monday for Labor Day!\*\*\*\*\*" is visible in the field above the button.

# Notes in Evolution

It is possible to exempt specific accounts from printing an invoice note. This is done in the **Doctor A/R Setup** form of the **General** tab from the **A/R** menu. Simply left click the box for **Do Not Print Invoice Lab Note**; then click **Save**.



# Notes in Evolution

## Doctor

These notes are tied to specific accounts on the **Doctor A/R Setup** form of the **General** tab in the **Invoice Doctor Note** field. This note will print on every invoice for that account, regardless of any other defined notes. These notes stop printing only when they are removed from the field for that account.

The screenshot shows the 'Accounts Receivable Doctor Setup' window. On the left, there is a table of doctors with columns for Last Name, First Name, and MI. The 'General' tab is selected, showing various configuration options. The 'Invoice Doctor Note' field is highlighted with a red arrow, and the 'Save' button is also highlighted with a red arrow.

| Last Name                | First Name | MI |
|--------------------------|------------|----|
| Adams                    | Sheree     |    |
| Atlanta Nu Smile         |            |    |
| Baily Dental Center      |            |    |
| Campbell                 | James      |    |
| Doe                      | John       | P. |
| Edger                    | James      |    |
| Fort                     | Edward     |    |
| Gentle Dental Clinic     |            |    |
| Haller                   | Brian      |    |
| Inman                    | Kathy      |    |
| Jackson                  | Curtis     |    |
| Kasper                   | Kathleen   |    |
| Kersey Dental Lab        |            |    |
| Luna Happy Smiles Lab    |            |    |
| McKeen                   | Cindy      |    |
| New Dental Clinic        |            |    |
| North Georgia Dental Lab |            |    |
| Olson                    | Beth       |    |
| Phelan                   | Todd       |    |
| Quinn                    | Sheila     |    |
| Riddle Dental Clinic     |            |    |
| Rosenberry Dental Lab    |            |    |
| Silverlake Dental        |            |    |
| Simpson                  | Patrick    |    |
| Slaughter                | Bradley    |    |
| Toccoa Nu Smile          |            |    |
| Tomar Dental Group       |            |    |
| UGA Dental School        |            |    |
| Vandiver                 | Peter      |    |
| Wilbanks                 | Matt       |    |
| Worthington              | Jeff       |    |
| Worthington              | Susan      |    |

Active Location: ABS Dental Lab, Acct Number: 1008, Currency: USD, Date of First Case: 9/5/2004, Date of Last Case: 3/30/2017, Status: Active

General | Pricing | Balances | Credit Cards | Sales Reporting

[ Bill To Information ]  
[ Bill To Account ]  
 Account is Bill To Account

[ Currency ]  
Currency: United States dollar

[ Credit Info ]  
Credit Limit: \$0.00, Extra COD Amt: \$0.00  
Credit Type: Standard

[ Statement Options ]  
 Open Item  
 Bal fwd statement/Openitem pay

[ Open Item Credit Memo Behavior ]  
1 - Auto Apply CM

[ Service Charge ]  
 No  Yes

[ CC Process Group ]  
01 - Monthly

[ Print Options ]  
Do Not Print Invoice Lab Note:   
Invoice Doctor Note: Dr

[ PPACA ]  
Subject to Excise Tax:

Link Unlink

[ Primary Address ]  
Primary Address- Clarkesville  
12 Main Street  
Suite 200  
Clarkesville, GA 30523

Save

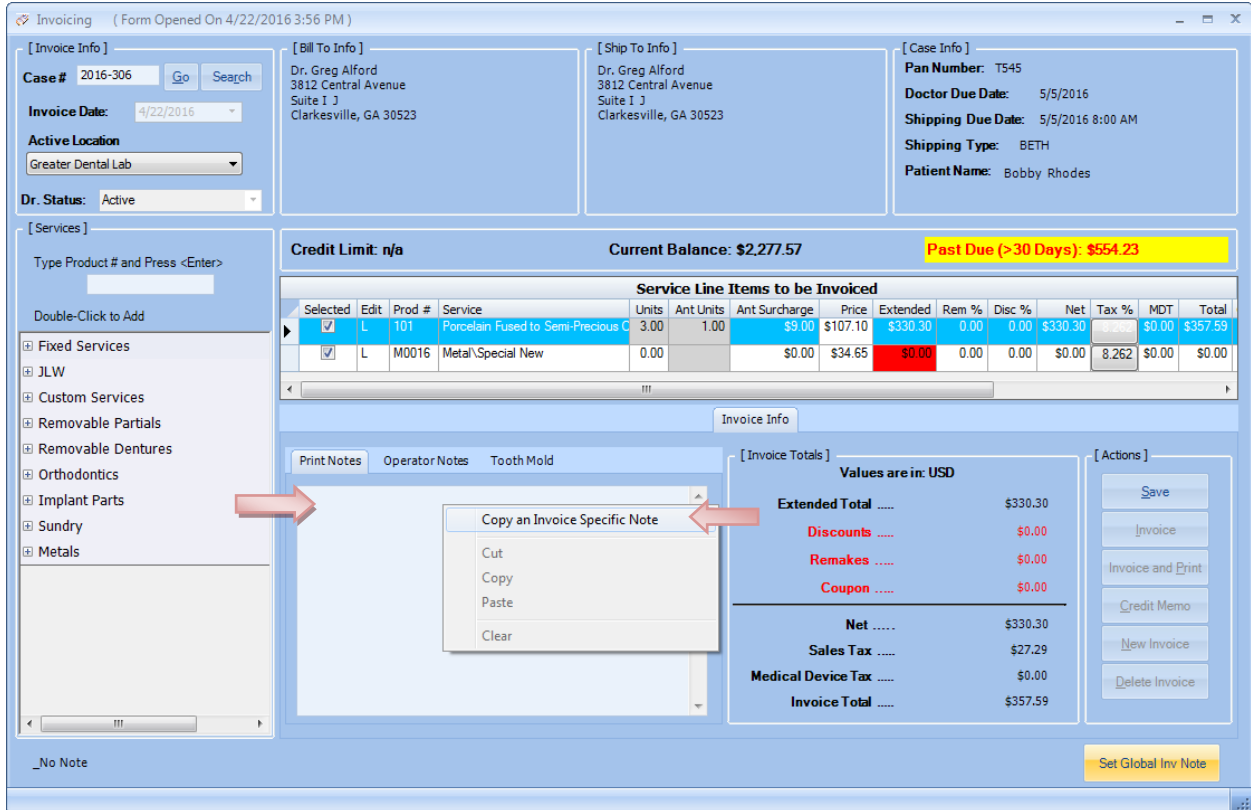
Doctor Data was Loaded!

# Notes in Evolution

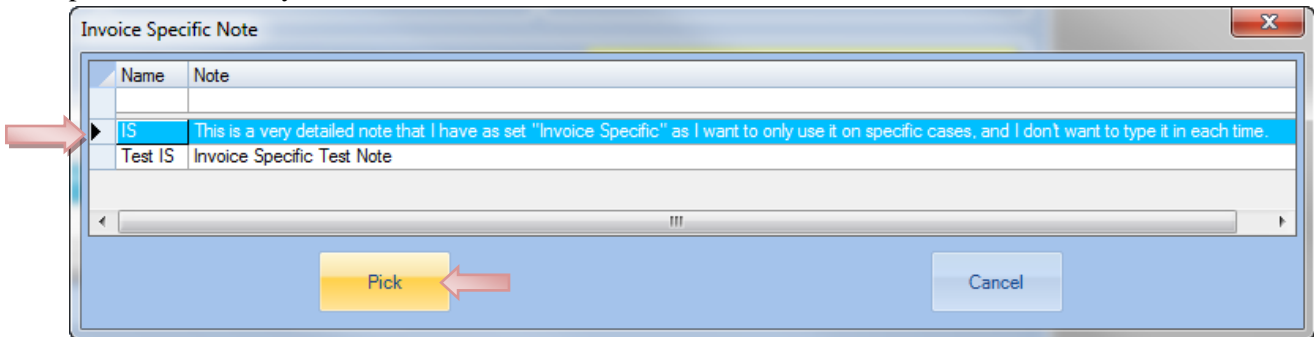
## Invoice Specific

These notes were added to allow labs to pre-define specific notes that should print only on specific invoices. Instead of having to type a free-form note in the **Print Notes** field for every qualified invoice, the operator can pick these notes and the copies from the note to the **Print Note** field. By choosing the note rather than free-form typing these notes, labs are assured the information is consistent and correct.

Right-click in the **Print Notes** box and select **Copy an Invoice Specific Note**.



Select a specific note from the box and select **Pick**. The note text is copied and can stay the same or be edited. You may also copy from multiple Invoice Specific notes on one invoice, but each one must be picked individually.



# Notes in Evolution

The note is now part of the specific invoice for that case. Click **Save**.

The screenshot shows the 'Invoicing' window for Case # 2016-306. It includes sections for Invoice Info, Bill To Info, Ship To Info, and Case Info. A summary bar shows a Current Balance of \$2,277.57 and a Past Due amount of \$554.23. The Service Line Items table lists two items: Porcelain Fused to Semi-Precious Crowns and Metal/Special New. A note editor is open with a sample note, and a red arrow points to the 'Save' button in the Actions panel.

| Selected                            | Edit | Prod #  | Service                            | Units | Ant Units | Ant Surcharge | Price  | Extended | Rem %    | Disc % | Net    | Tax %    | MDT    | Total  |          |
|-------------------------------------|------|---------|------------------------------------|-------|-----------|---------------|--------|----------|----------|--------|--------|----------|--------|--------|----------|
| <input checked="" type="checkbox"/> |      | L 101   | Porcelain Fused to Semi-Precious C | 3.00  | 1.00      |               | \$9.00 | \$107.10 | \$330.30 | 0.00   | 0.00   | \$330.30 |        | \$0.00 | \$357.59 |
| <input checked="" type="checkbox"/> |      | L M0016 | Metal/Special New                  | 0.00  |           |               | \$0.00 | \$34.65  | \$0.00   | 0.00   | \$0.00 | 8.262    | \$0.00 | \$0.00 |          |

## Product

These notes are to be associated to products and metals so they will print on the invoice if that product or metal is selected on a case. Once set up, you may associate them to a product under the **Services** grid in the **Service Centers** form under the **Product** menu. You may associate to a metal under the **Metals** form also under the **Products** menu. Select the appropriate note from the drop down list in *Product Invoice Note* column on the row for the correct product or metal. Then select **Save**.

The screenshot shows the 'Services' grid with columns for Product Number, Status, Value Add, Metal By Tooth, Require Teeth, Connector, Conn. Units, Print Cert, Include in MDT, Disclosure Note, Product Invoice Note, Do Not Remake, Description, and InvoiceDescription. A dropdown menu is open for the 'Product Invoice Note' column, showing options like 'GA Test Prod Note' and 'Prod 2010 Note'. A red arrow points to the 'Save' button at the bottom of the window.

## Dr. Portal Case Notes

If you are using Dr. Portal, your doctors may enter notes associated with their cases. When that occurs a user in you lab may be notified that a note was added on a case from the Dr. Portal. Do determine who gets that notification, you can control this in the **EvoWebAdmin** program under menu path:

**Configuration and Setup > Notifications.**

The **Case Note Added** notification set up is what drives this. The first user in the list is the one that will be assigned as owner when notes are added to cases in the Dr. Portal. That means that person will get notified when a doctor enters a note on a case in the Dr. Portal. So you will want to keep this in mind when you are setting the order of the users on this notification.

Notification Setup

Location: ABS Dental Lab, Inc

Top user in each active grid will always be notified even if unselected.

[ Web Portal ]

| Case Added       |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |
| Anissa Russell   | <input type="checkbox"/>            |  |

| Case Deleted     |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |
| Anissa Russell   | <input type="checkbox"/>            |  |

| File Added       |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |

| Image Added      |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |

| Pickup Request   |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |

| Case Note Added  |                                     |  |
|------------------|-------------------------------------|--|
| User             | Always                              |  |
| Barbara Knighton | <input checked="" type="checkbox"/> |  |
| Administrator    | <input type="checkbox"/>            |  |

| CC Payment Received |                                     |  |
|---------------------|-------------------------------------|--|
| User                | Always                              |  |
| Barbara Knighton    | <input checked="" type="checkbox"/> |  |

[ Driver App ]

| Driver Note Added |                          |  |
|-------------------|--------------------------|--|
| User              | Always                   |  |
| Barbara Knighton  | <input type="checkbox"/> |  |

Web Service Notifications: Default User

Barbara Knighton

Save

**When you right click on any of the notification grids, you get the following options:**

**Add eMail:** Select this to get a user's list. It will display their primary email set on the User's Form in **EvoData**.

**Remove eMail:** Select to remove user from the notification list.

**Move Up:** Select to move the user up in the notification list. (Note: Only for Web Portal notifications.)

**Move Down:** Select to move the user down in the notification list. (Note: Only for Web Portal notifications.)