

Service & Product Setup

Quick reference for adding a new service or product in EvoData

A summarized guide for labs already using EvoData: add a new product, build its recipe, and set its service display order. Press F1 in EvoData for the full online documentation.

I. Adding a New Product

- Go to **Products > Service Centers**.
- Right-click in the **Services** grid and pick **New Service** — your cursor drops to the bottom of the grid, blinking in the **Product Number** field. Use the right-arrow key to move from field to field.
- Enter a **Product Number** (must be unique).
- Check the **Required Teeth** flag if this is a fixed product and you want to force the case-entry person to pick teeth.
- In **Description**, enter your internal description. Space is limited on productivity apps — abbreviations are fine as long as everyone in the lab knows what they mean.
- In **Invoice Description**, enter how it should print on the invoice.
- Click **Save**. The **Set Price** box opens — give the product its price.
- Select the **Price Service** flag if this is a removable product or an add-on (charges by the arch; price is not multiplied by the number of teeth).
- **Cost** is your cost to make the product (optional, for reporting only). If you are in a taxable state, pick the correct state. Pick the **Default Sales Department**, then click **Continue**.

Tip: Made a mistake after clicking Continue? Fix it in the **Price List** grid (lower-right of the Services grid), or go to **Products > Price Lists** for anything price-related, including the Price Service flag. Full help: online document **Services Setup & Maintenance** under Setup and Maintenance.

II. Creating the Recipe

- Go to **Maintenance > Recipes**. (A recipe is not required if you do not physically make the service.)
- If the new recipe matches another product's, open that product's recipe, right-click in the **Recipe Header** grid and choose **Copy Recipe**. Then open the new service, right-click in the Recipe Header grid and pick **Paste**.
- Change the **Name** and **Description** in the Recipe Header by clicking those fields if needed.
- To add a step, right-click and choose **Add Recipe Steps**, pick the step(s), then **Continue**. To delete a step, change its **Day** field to 0 and click **Save**.

More detail: Building a recipe from scratch or need more help? See the online document **Recipes Setup and Maintenance** under Setup & Maintenance.

III. Service Display Order

- Go to **Maintenance > Serv Disp Order** (Service Display Order).
- The new product is likely at the bottom. Use the **Up Arrow** on the right to move it under the correct header, then the **Right Arrow** to tie it under that header.
- More help: online document **Service Display Order** under Setup & Maintenance.

Need help?

Atlanta Based Systems Support | (800) 476-2097 ext. 1

Adam Thomas, Sales Manager | (800) 476-2097 ext. 231 | adam@atlantabasedsystems.com

www.atlantabasedsystems.com