TRANSACTOR 7 FEATURES

✓ Manage your dentists, practices, technicians, products, prices, jobs, invoicing and payment receipts.

✓ Fast job handling, i.e. Book in, Book out ongoing, Book out completed, Hold, Edit, Delete & Copy.

✓ Job details may be simple or detailed, i.e. include assigned technicians on job items.

✓ Output reports include:- quotes, delivery notes, patient statements, job tickets, mouthguard declarations, price lists, invoices, credit notes, summary invoices, statements, job status notifications, address labels, job labels, debtors letters and more.

✓ Reports may be printed, saved to file or emailed to customers.

✓ Reports may be automatically printed and/or emailed while you are working with jobs (in accordance with your set up preferences).

✓ Personalise reports with your company logo, labelling and custom message text.

✓ Speedy retrieval of jobs by job number or by searches via related customer, patient or job state.

✓ Add payments to customer accounts. Payments may be allocated to specific invoices or auto allocated to the earliest unpaid invoices.

✓ Control Centre – for easy set up and management of Transactor Lab Manager settings and options.

✓ Optional export to Sage, Kashflow, Clearbooks or Xero (Commercial module).

✓ Export to My Dentist (aka IDH) and Oasis (Commercial module).

V8 HAS ALL OF THESE BUT THE FOLLOWING NEW FEATURES

V8 NEW FEATURES

✓ CABLE DENTAL – Integration allows jobs to be placed by practices using their innovative practice management app which allows the dentists to place orders when using their everyday software and much much more

✓ Cloud portal - Your lab orders placed securely in the cloud on upgrade and thereafter all new orders Booked in will be available in your lab portal for you to review from anywhere and carry out a provisional Book in.

✓ Notes and file attachments - Can be added to jobs at any time at lab or practice from anywhere.

✓ Bar code scanning - Job Ticket, Delivery Note, Patient statement and Invoice include a Bar Code next to the Job number. Jobs can be instantly brought up on Transactor by scanning the bar code.

✓ Job no's prefix character - This is to differentiate Jobs added via the Cable Dental portal from those added at the lab. Prefixes are used for other jobs types also.

✓ Price bands - 'Allow custom prices' - You can change the price of a product item without the price band changing. If a price band is defined as not allowing custom prices, this effectively makes the prices of that band fixed or read only.

✓ Due Date Calendar – lab closed days - Can be assigned. A warning message pops up if you Book in a job with a closed due date specified. When adding a new job, turnaround days can be set to skip 'closed days'.

✓ Export to CSV file - All selection lists in Transactor have the option to "Export this list to CSV file".

✓ New SendTo types - (i) Printer (windows default) this works without the need to 'Assign to printer', (ii) Printer (report size) – the page size automatically matches the report being printed, (iii) Attachment – job related reports are added as job attachments.

✓ Easier selection of previously used customer - When viewing a job, if you press BackSpace on the Customer box, the job details clear from the form, however, the customer details remain.

✓ 'Customer details' & 'Sub Totals' display - Areas on the main Transactor screen can now include coloured text and backgrounds. eg. The Account Balance shows in RED when money is owed.

✓ Emailing is faster more streamlined - Does not require a Emailer application running all the time.

✓ Customised 'Letter' reports - From to Dentist(s) and Practices(s).

✓ Job snapshots - Are automatically saved to file. The snapshots are pdf files with a filename of the job number, date and time, containing the main job details. These files are written to a designated 'snapshots' folder.

V8 IMPROVEMENTS

✓ Customer accounts can have any number of designated price bands and one set as 'favourite'.

✓ Multiple Job Notes can be added to each job. Notes are time stamped & user identifiable.

✓ Improved speed of Selection list dialogs and Batch Report Manager (BRM).

✓ Date entry - when entering TODAY + or - number of days, this was restricted to max 28. Now it's 3650.

✓ Text input such as names, addresses, tel no's, emails etc... are now stripped of leading and trailing spaces to help minimise keyboard input errors.

✓ Control Centre - Improved guidance in Reports editor.

✓ Simpler Reports editor which only presents the user with those report items that are not protected.

✓ Due Date – option when entering via keyboard, if day only is entered then this defaults to next month if the day is less than than the current day.

✓ Early Payment Discount (EPD) used in Statement Reports can now exclude non-discountable items. This is settable in Control Centre.

✓ Bundled items output on reports: Invoice A4, Invoice A5, Summary Invoice detailed, Summary Invoice detailed monthly, and Statement detailed unpaid - can now optionally summarise the bundle such that the child items are not printed.

✓ When using the Preview Window to preview a report, if you click the Save to file option, the filename will be the name of the report and target criteria.

✓ Improved FILELINK, you can specify description text rather than the link file specification, and also the properties of the FILELINK item can be edited.

✓ Report Editor can now print BARCODE's of type BCT-128.

✓ The Transactor main window size and position may optionally be saved so that Transactor always starts at the same screen position and window size as when it was last used.

✓ In the Transactor main window caption bar the /Terminal name is appended to the end of the Company name.

✓ Toggle items display using hotkey (Ctrl+D), this cycles thru all the active grid display choices.

V8 HAS FIXED THE FOLLOWING BUGS

✓ In Selection lists - where if a note column wraps to greater than 15 rows, the whole record entry does not appear in the list. We now truncate the wrapped text to upto 6 rows.

✓ Some lists may be in 'case sensitive' sort order where they should be in 'case insensitive' order, these are now fixed by use of the use of COLLATE ads_default_ci instead of _cs in the selection scripts. Also modified some of our ADS Functions to return case insenstive results.

✓ Customer Dialog - when changing selection of Customer Type the warning/confirm message mechanism is now much simpler and not confusing.

✓ When Emailing from Preview Window the report is sent ok on the first attachment, however, a second corrupt/empty attachment is also attached. This was due to an incorrect file name size of 50. It is now correctly set to 128.

✓ Job Item Edit dialog - Allow Line Discount tick box was disabled. This is now enabled.

✓ Emailer now sets the From: header of the email to CompanyName <emailaddress>. We think this may be better when scanned by email spam filters. Also the ReplyTo: is populated with the email address.

✓ On a multi-user Transactor, if the Company name is greater than 40 characters, Transactor appears to start ok, however, most functions do not work. The reason is the the Application ID which is set at startup was exceeding its max of 70 chars. This is now fixed, the Application ID is made up of the Application Name + Company name + SessionID. We now truncate the Company name to 32 characters.

✓ Customer History - Advanced selection view. Unpaid column was integer, its now corrected to decimal.

✓ Customer details on main form - Displayed Account balance is updated after payments are added and when Customer History dialog is closed (in case payments were deleted while in the history dialog).

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