



# TRAINING WORKSHOPS XDENT

MAY 2022



**DentalWize XDENT Training Manual  
for Receptionist and Admin**

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## NOTE:

For the purpose of this training session, sections in this manual have been extracted from the extensive training manuals. All source documents are referenced and can be accessed at [www.cgm.com/za-xdenttraining](http://www.cgm.com/za-xdenttraining) or by scanning the QR code below.



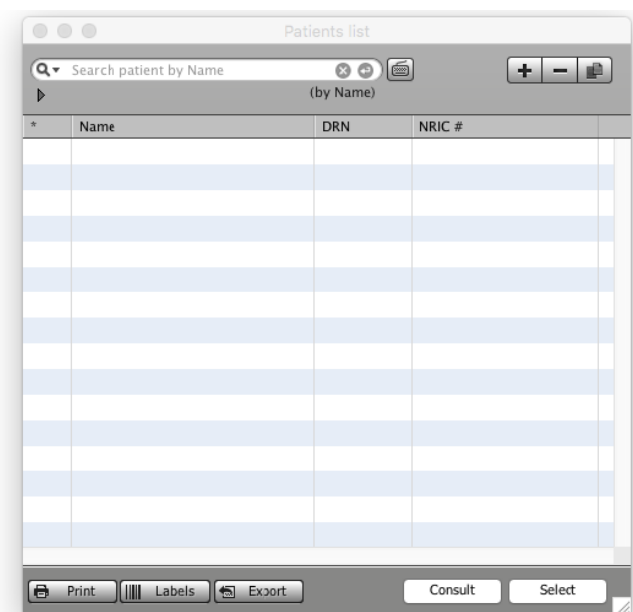
**Scan** for full  
training manuals

## 1. Creating / Registration of Patients

TRAINING GUIDE REFERENCE: Page 4 / XDENT Quick User Guide v0.9\_20160317

### How do you create a patient?

Click on Patients place a button on the toolbar and press “+” then enter the data.



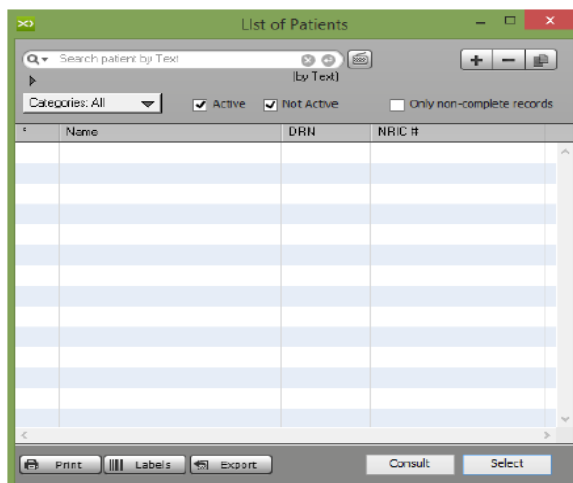
TRAINING GUIDE REFERENCE: Page 27 / XDENT\_User\_Guide\_v1\_2

## 7. PATIENTS

The patient list contains the list of patients present in XDENT and search mechanisms that are very powerful. To view patients in the database, press the Enter key on your keyboard, Use the appropriate search field to filter the patients to be displaced based on the “Name” value or any other search. Each time you press a keyboard character; Search is activated on that part of the display name.

Take note that setting search value as “Text” at the dropdown on the magnifying glass allows you to search all fields.

To open a patient record, you must search for it, select and click “View” or Double Click on the name of patient show in the the list.



## Practice patients

The list of the patients managed by XDENT is accessible through *Patients List that* allows you to find, add, delete, browse, duplicate, print and export patients' data.

Find function can be activated through "ENTER" or by clicking on the corresponding icon, placed on the right of the Lookup Field. If the Lookup Field is left empty, all the patients are viewed in the personal data field; otherwise the search is filtered through the selected key search and what is written in the Lookup Filled.

The patients list can be viewed both as a table and as a *FORM* also displaying the patient photo and the phone details for instant VoIP call. Select your choice from Settings.

## 2. Searching for Patients

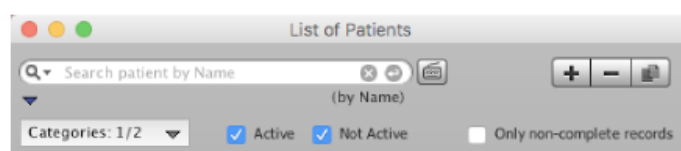
TRAINING GUIDE REFERENCE: Page 38 – 42 / Full Guide\_XDENT\_English\_Clinical

### Search Filters

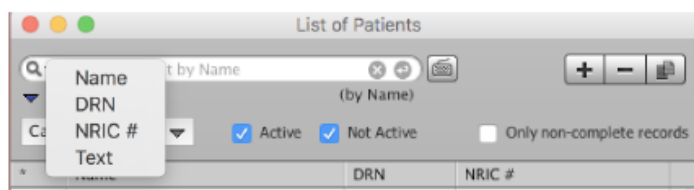
Once you have set the search parameters of a working session, these are stored for the next use of XDENT. In this way, the type of search filters (surname, name, text, ...) or interest categories, usually used, do not need to be set again every time XDENT restarts. In addition to the filters Through personal data, there is also a filter that narrows the search of the patients according to their associated category.

In order to access the categories filter, click on the arrow under the Lookup Field in the patient list window. If you click on the filter, you can select one or more categories in order to view all the patients included.

The categories filter takes into account all the categories specified in the patient's records.



In the table layout (that can be activated from Setting Patients record), were the column displayed in the can be customized, the window can be set both Horizontally and Vertically.



### Search in the Patients List

The search parameter in the patients list can be set by surname, name code, phone number or text as shown in Figure.

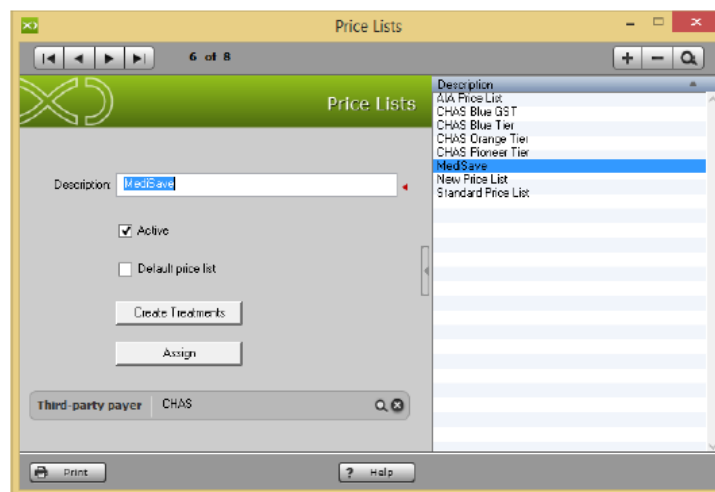
### 3. Linking Price Lists

TRAINING GUIDE REFERENCE Page 114 / XDENT\_User\_Guide\_v1\_2

## How to Add/Edit/Delete Price List in XDENT?

The clinica can modify the price list for the treatments and adapt them from existing lists by clicking “assign” it will copy the treatment record from the other pricelist to the selected price list or create a new pricelist with a blank record and you can select Price list as Default.

To make changes to a Price list, access the Treatments and then Price list.



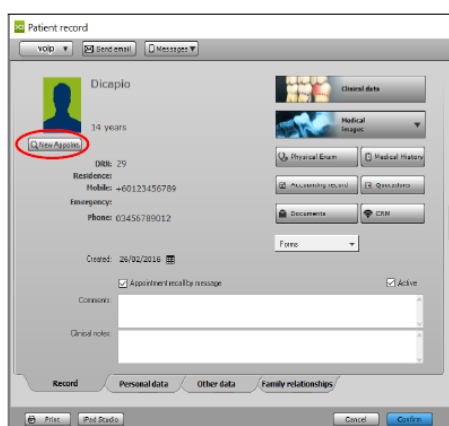
#### 4. Navigating the Agenda (Calendar)

TRAINING GUIDE REFERENCE Page 5 / XDENT Quick User Guide v0.9\_20160317

### How do you fix a new appointment for a patient?

Open the patient's record, press the "New Appoint." button. Double-click on the time of the day of interest. Here you can indicate all appointment details.

See details in section PLANNING WEEKLY/DAILY



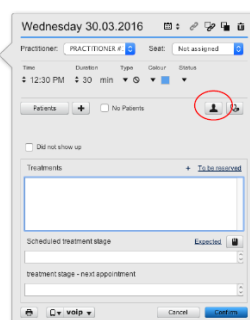
TRAINING GUIDE REFERENCE Page 13 / XDENT Quick User Guide v0.9\_20160317

The weekly/daily planning is done in the Agenda of the clinic and presents various display options:

- **Planning Practitioner:** used to manage the appointments of an individual doctor.
- **Planning Multi-practitioners:** used to view and manage agendas simultaneously for more doctors.
- **Planning Practices:** used to manage appointments in relation to shared resources: XRAY Rooms, Dental Chairs, Other Rooms, etc.

Depending on the type of clinic organizations choose the desired planning. The window Weekly/Daily Planning is displayed at the time intervals of 15 minutes that allow the assignment of appointments (configurable option in the preferences).

To Insert a new appointment, double-click with the mouse on the time match desired, It opens a detailed of window "appointment" that lets you choose the patient among those in the database through the "Patients" button or enter a new one using the "+" button. You can also specify the duration of the appointment and performance planned, i.e. The type of treatment to be performed on the patient. From the appointment window, you can go directly to a patient's record through the appropriate button "Patient Record".

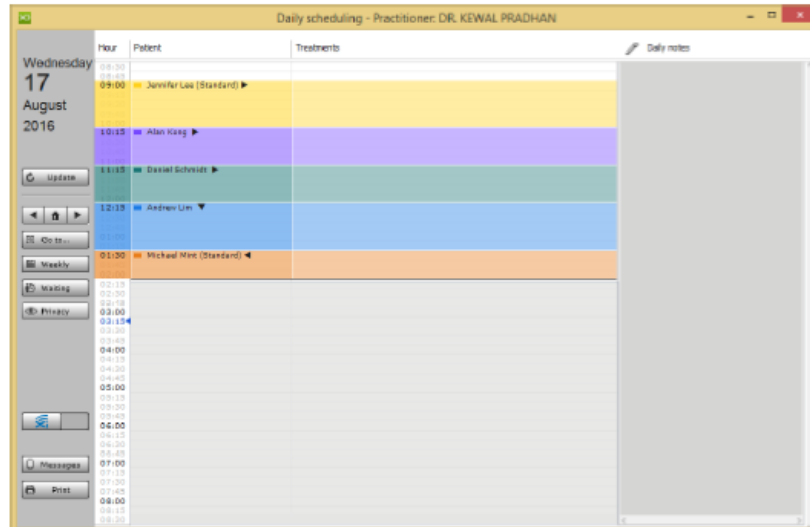


## 8.2 Daily Scheduling

### How to view Daily Schedule of Practitioner in XDENT?

Go to Agenda > Daily Scheduling

This will show the daily schedule of individually selected practitioners.



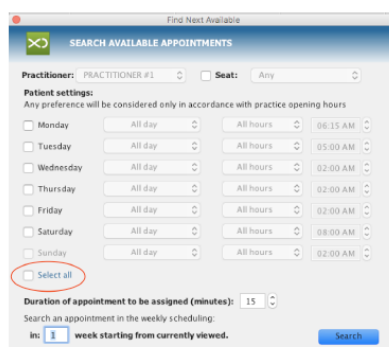
### Searching for a new appointment

Through function 'search for a new appointment; specific hours and time ranges in which a patient is available for an appointment can be defined, obviously based on practice needs and the possible duration of the appointment.

If a patient has no preferences, check box *select all* can be used to enable or disable all days in this one click.

#### Tip

**XDENT** saves the last selection. Therefore, if assigning several appointments in a row is desired, conveniently configure the search parameters and assign the first appointment in the scheduling accordingly. By recalling the *New Appointment* function, a research starting from the first appointment assigned with the parameters already selected the first time activated.





## 5. Quotes

TRAINING GUIDE REFERENCE Page 17 / XDENT Quick User Guide v0.9\_20160317

**Quotations of Razaq**

1 of 1

**Quotations Archive**

Title: Quot1 User: Administrator Date: 15/03/16 Amount: 980.00

Patient: Pending

Financing charges: fixed 0.00 % 0.00 Total cost: 0.00

Variable data

Practitioner: Smith John  
Patient: PLAZA DE ESPANA 12345 MADRID (XX)  
Date: 123456  
Quot. no.:  
Quot. name:  
Practice logo:  
Ref. Doctor:  
Ref. Sake:

Quotation #2 Quota 1

Dear <Title> Razaq:

18 17 16 15 14 13 12 11 21 22 23 24 25 26 27 28  
48 47 46 45 44 43 42 41 31 32 33 34 35 36 37 38

UPPER DENTAL ARCH  
Treatment:  
23 Root canal anterior first v... Amount: Ringgit300.00  
23 scaling and polishing Ringgit60.00  
LOWER DENTAL ARCH  
Treatment:  
45 Root canal anterior first v... Amount: Ringgit200.00

Quotation total amount Ringgit 980.00

12/3/2016

PAYMENT MODE  
Deposit: +300.00  
No. installments: 2 When treatment plan is completed:580.00  
Due date: contact treatment

TRAINING GUIDE REFERENCE Page 61 – 65 / XDENT\_User\_Guide\_v1\_2

## How to issue a Quotation for a Treatment Estimation to Patients in XDENT?

The QUOTATION contains all the patients estimates, and from here the Practitioner can generate a cost estimate for the patient with the agreed upon payment terms, change the state of each of them and eventually eliminate them or duplicate them to adduce changes. The Practitioner must create a NEW Treatment plan and ADD treatment then click Quotation Button on left bottom.

**XDENT Dental Chart**

18 17 16 15 14 13 12 11 21 22 23 24 25 26 27 28  
48 47 46 45 44 43 42 41 31 32 33 34 35 36 37 38

Medical records  
Conservative  
Endodontic  
Implant  
Ortho  
Periodontal  
Malocclusion  
Status  
Aesthetics

Treatment plan  
Add Treatment

Treatment status  
Planned  
In Progress  
Performed

Quotations

No.	Type	Treatment	Time	Amount	Status	Date	Practitioner	App. Date	App. by
1	Diagnostic	Consultation (Complex)	45	120.00		12/06/20	DR. KENAL PRADH		DR. KENAL PRADH
2	Endodontic	surgical endodontics	60	1,440.00		12/06/20	DR. KENAL PRADH		DR. KENAL PRADH

## How to Create/Add/Edit/Delete Quotation Form in XDENT?

Documents > Quotation Form

Clinic able to Create/Add/Edit/Delete quotation form in this form module, Form field variable are available to select the field from the XDENT Database.

The screenshot shows the 'Quotation Form Storage Management' window. On the right, a list of templates is shown, with 'Standard Quotation' selected. The main area displays a preview of the 'Standard Quotation' form for 'Apple Pie Dental'. The form includes fields for Patient Name, Gender, NRIC, and various dental services. The bottom of the window has 'Print' and 'Help' buttons.

TRAINING GUIDE REFERENCE: Page 59 – 63 / Full Guide\_XDENT\_English\_Clinical

The screenshot shows the 'Quotation Calculation' window. It features a table with the following columns: Tooth, Treatment, T.P. payer quota, Patient quota, Reduct., Reduced patient quota, and Total amount. The table contains data for various dental treatments. Below the table, there are fields for 'Total quotation', 'Deposit', 'Installments no.', 'Due date', and 'When treatment plan is completed'. There are also buttons for 'Apply Discounts', 'Reductions', 'Initial price', 'Edit', 'Update', 'Apply', and 'Cancel'.

Tooth	Treatment	T.P. payer quota	Patient quota	Reduct.	Reduced patient quota	Total amount
32-33,44-45	Periapical/ Bitewing	8.00	36.00	0.00	36.00	36.00
15	pulpotomy	8.00	720.00	0.00	720.00	720.00
21	Occlusal View	8.00	72.00	0.00	72.00	72.00
42	molar root canal therapy	8.00	1,200.00	0.00	1,200.00	1,200.00
45	surgical endodontics	8.00	1,440.00	0.00	1,440.00	1,440.00
44	Consultation (Complex)	8.00	120.00	0.00	120.00	120.00
	Consultation (Complex)	8.00	120.00	0.00	120.00	120.00

## 6. Billing and Invoicing

TRAINING GUIDE REFERENCE: Page 7 / XDENT Quick User Guide v0.9\_20160317

### How do you issue an invoice?

Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.Inv."

The screenshot shows the 'Accounting record' window for patient Daniel Schmidt. The window is divided into several sections. At the top, there's a header with the patient's name and an 'Accounting statement' showing 0.00. Below this, there are two main sections: 'Debits' and 'Credits'. Both sections show a total of 0.00. To the right, there are 'Due dates' and 'Past Due dates', both also at 0.00. Below these sections, there's a table with columns for Tooth, Treatment, Practitioner, Status, Price List, Amount, Deposits, and Invoices. Under the table, there are three smaller tables: 'Documents', 'Deposits to be invoiced', and 'Payment due dates'. The 'Documents' table has columns for Num., Date, Amount, Dep. inv., and Paid. The 'Deposits to be invoiced' table has columns for Date and Amount. The 'Payment due dates' table has columns for Date and Amount. At the bottom of the window, there are buttons for 'Print', 'Full Paym. Inv.', 'Treatment plans', 'Other documents', 'Cancel', and 'Confirm'.

TRAINING GUIDE REFERENCE: Page 8 / XDENT Quick User Guide v0.9\_20160317

### How do you register a payment of an invoice?

Go to the menu bar, click "Accounting" - followed by "Credit Collection"

The screenshot shows the 'Due dates to be cashed' window. The window has a menu bar at the top with options: XDENT, Archive, Edit, Multimedia, Operations, Documents, Accounting, Store, Services, Windows, and Help. Below the menu bar, there's a section titled 'Payments to be collected'. This section contains a table with columns for Due date, Amount, Customer, and Description. Below the table, there's a 'Filter' field and a 'Select all' checkbox. The 'Total selected due date amount' is displayed as 0.00. At the bottom of the window, there's a 'Payment details' section. This section includes fields for Date (17/3/16), Type (Cheque), Amount (0.00), and Notes. There is also an 'Account' field and a 'Payment entry' button.

Scheda Contabile

**Campisi Alessia** Situazione contabile: **0,00** [Saldi del piano corrente](#)

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**Debiti** **Crediti**

Prestazioni eseguite: **0,00** Documenti pagati: **0,00**

Acconti da fatturare: **0,00** Prestazioni da eseguire: **1.400,00**

Totale Debiti: **0,00** Totale Crediti: **0,00** Totale: **1.400,00**

Totale scadenze: **0,00** Totale scadute: **0,00**

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Data: 09/10/2013 Nuovo piano di trattamento - Preventivo n. 1 di Euro 1.400,00

Dente	Prestazione	Operatore	Stato	Linkino	Importo	Acconti	Fatture
13	Impianto osteointegrato	DR. VERDI	da eseguire	700,00	700,00	0,00	0,00
16	Impianto osteointegrato	DR. VERDI	da eseguire	700,00	700,00	0,00	0,00

**Documenti**

Num.	Data	Importo	Acconto	Pag.

**Acconti da fatturare**

Data	Importo

**Scadenze di pagamento**

Data	Importo

Data: 12/09/2013 Proposta di trattamento predefinito di Euro 13.700,00

Stampa

Fattura Acconto

Fattura Saldo

Nota di credito

Annulla

Conferma

**Invoice**

Issued by: DGH Singapore

Type: Invoice

Number: 81 /

Date: 12/10/16

Customer: Mr. Kwee  
171, CHIN SWEE ROAD (SAN CENTRE)  
169677 - SINGAPORE

NRIC #/Passport #: S86000002

Payment: Cash

Store:

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**DETAIL**

Code	Description	Qty	M.U.	Price	T.P. Payer	% VAT	% Discount	Total
PDC	complete denture acrylic each jaw PHASES	1		1.200,00	0,00	0	0,00	1.200,00

☐ Print the following synthetic description in the document

TAXABLE INCOME: 1.200,00

VAT: 0,00

TOTAL AMOUNT: 1.200,00

PATIENT TOTAL: 0,00

T.P. PAYER TOTAL: 0,00

Round off

Print Send email Cancel Confirm

## 7. Reports

TRAINING GUIDE REFERENCE: Page 24 / XDENT Quick User Guide v0.9\_20160317

This function is accessible from the toolbar or from REPORT menu and allows you to obtain statistical information on the doctor's clinic. Such a tool is crucial for obtaining useful information to the economic management of the study.

The reports are divided into:

- Accounting
- Purchase
- Medical History
- Appointments
- Patients
- Stock

All reports can be applied to any period of interest by selecting the date of start and end date compared to what you want to get the results.

Reports can also be obtained in graphic form and results can be exported to Excel data sheets for a possible post-process.

TRAINING GUIDE REFERENCE: Page 1 – 7 / XDENT Suggested Reports (all main reports)

### Suggest Day End reports

#### Patients Invoiced Report (Summary)

**Function:** To have a list of patients invoiced for a specific Day OR a Specific Date containing a summary of the invoiced totals.

**Location:** Report > Accounting Reports > Accounting Tab > Sales Volume option

Leaving all selections as default just update the "From:" and the "To: dates as required.

The screenshot displays the 'Accounting reports' window with the title 'ACCOUNTING STATS (in a given timespan)'. The 'Accounting' tab is selected. The date range is set from '01/07/20' to '31/07/20'. The 'Sales Volume' report is chosen, and the 'Revenue' sub-tab is active. The interface includes several filter options: 'Total sales volume in the timespan' with radio buttons for 'All issuers', 'All patients', 'All ref. practitioners', and 'All Reference person(s)'; 'Invoicing items detail' with a search button; 'With payments' with radio buttons for 'All payments types', 'All types', and 'All practitioners'; and 'By payment type', 'By type', and 'By practitioner'. At the bottom, there are radio buttons for 'Monthly sales volume', 'Daily sales volume', and 'Invoices in the timespan', along with a 'Report' button.

## Suggested Month End reports

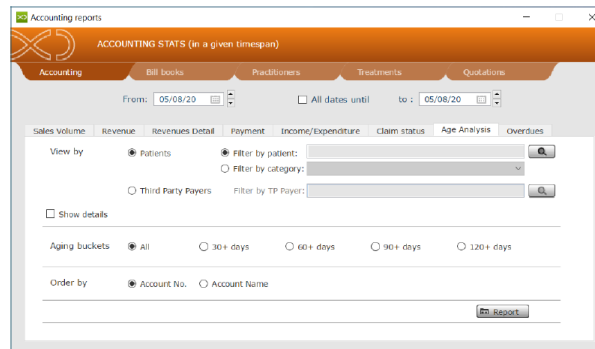
### Age analysis (Summary)

Function: To get a list of all 30,60,90,120+ days outstanding accounts.

Location: Report > Accounting reports . Accounting Tab . Age Analysis option

Leaving all selections as default this will give you a summarised report on the patient account aging.

For more details as to what treatments are still outstanding select the “Show Details”

The screenshot shows a software window titled "Accounting reports" with a sub-header "ACCOUNTING STATS (in a given timespan)". The window has several tabs: "Accounting", "Bill books", "Prescriptions", "Treatments", and "Quotations". The "Accounting" tab is active. Below the tabs, there are date pickers for "From:" (05/08/20) and "to:" (05/08/20), with an option for "All dates until:". A horizontal menu contains options: "Sales Volume", "Revenue", "Revenues Detail", "Payment", "Income/Expenditure", "Claim status", "Age Analysis" (which is selected), and "Overdues". Under "View by", there are radio buttons for "Patients" (selected), "Filter by patient:", "Filter by category:", and "Third Party Payers". There are also input fields for "Filter by TP Payer:". A "Show details" checkbox is present. Below that, "Aging buckets" are shown with radio buttons for "All" (selected), "30+ days", "60+ days", "90+ days", and "120+ days". An "Order by" section has radio buttons for "Account No." (selected) and "Account Name". At the bottom right, there is a button labeled "Run Report...".

TRAINING GUIDE REFERENCE Page 155 – 156 / XDENT\_User\_Guide\_v1\_2

## 16. REPORT

### Pending

This function is accessible from the toolbar or from REPORT menu and allows you to obtain statistical information on the doctor's clinic. Such a tool is crucial for obtaining useful information to the economic management of the study.

The reports are divided into:

- Accounting
- Purchase
- Medical History
- Appointments
- Patients
- Stock

All reports can be applied to any period of interest by selecting the date of start and end date compared to what you want to get the results. Reports can also be obtained in graphic form and results can be exported to Excel datasheets for a possible post-process.

#### 16.1 Accounting Reports

#### 16.2 Purchase Reports

#### 16.3 Medical History Reports

#### 16.4 Appointment Reports

#### 16.5 Patient Reports

#### 16.6 Stock Reports

Accounting reports

**ACCOUNTING STATS (in a given timespan)**

Accounting Bill books Practitioners Treatments Quotations

From: 19/01/17 All dates until to : 19/01/17

Quotas Treatments Treatments performed Output

Calculate quotas for Supervisors, Practitioners, Sales Representatives or Reference Persons in the period

☒ All Clinic managers ☐ All Group Supervisors ☐ All Practitioners ☐ All Sales Representatives ☐ All Reference person(s)

☐ By single user

☒ Consider also the performed phases ☐ Calculus on the revenue

☒ Quota gross of costs ☐ Quota net of financing costs ☐ Quota net of total costs