TRAINING WORKSHOPS XDENT



MAY 2022

DentalWize XDENT Training Manual for Super Users

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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 <u>www.cgm.com/za-xdenttraining</u> or by scanning the QR code below.



Scan for full training manuals

1. Creating / Registration / Patients

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

How do you create a patient?

(Q.≠ }	Search patient by Name	(by Name))	+ - 🖻
*	Name	DRN	NRIC #	
8	Print (IIII Labels) 📾 E	trocx	Consult	Select

Click on Patients placed 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 as 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 field.

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 list

×		Lis	t of Patients		- 🗆 🗙
Q.v Þ	Search patient by Text		O O E Ey Text)	3	<u>+ - #</u>
Cat	egories: All 🛛 👻	Active	 Not Active 	Only nor	-complete records
6	Namo		DRN	NRIC #	
					^
					~
<					>
0	Print Labels	Export		Consult	Select

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 patients 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.

•			List of Patients	
Q •	Name	t by Name	(by Name)	+ − ⊯
Ca	NRIC #	🗢 🔽 Activi	e 🔽 Not Active	Only non-complete records
*	TOXE		DRN	NRIC #

Search in the Patients List

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

3. 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".



TRAINING GUIDE REFERENCE: Page 87 – 99 / XDENT_User_Guide_v1_2

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.

8			Daily scheduling - Practitioner: DR. K	EWAL PRADHAN	×
Madnasday	Hour	Patient	Treatments		
17	08:30	- Jannifer i an (Sranfard) -			
August		- service (starter) P			
2016	10:00	- Also Vana b			
		- contrary P			
6 Unders	11:15	🔳 Daniel Schwidt 🕨			
O office					
4 A F	12:15	Andrew Um 🔻			
Co ta					
Weekly	01:30	Michael Mint (Standard) 4			
S Making	02:13				
SD Privacy	03:00				
	02:20				
	04:00				
	04:20				
	03:13				
2	06:00				
Messages	07:00				
9 Print	07:30				
	08:15				

TRAINING GUIDE REFERENCE: Page 64 – 67 / Full Guide_XDENT_English_Clinical

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.

ractitioner:	PRACTITIONER #1	<u>e</u> 03	Seat: Any		9
Patient setting Any preference	s; will be considered or	ily in accord	ance with practic	e open	ing hours
Monday	All day	0	All hours	0	05.15 AM 2
Tuesday	All day	0	All Neural	0	05:00 AM 🗘
Wednesday	Alt day	÷	All hours	0	02-00 AM
Thursday	All day	ĉ	All hours	0	02:00 AM
Friday	All day	0	All hours	0	02:00 AM 💲
Saturday	All day	Ċ.	All hours	0	08:00 AM 🔅
Sunday	All day	0	All hours	¢	02:00 AM
Select all	F. C.				

4. 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 reatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.Inv."

Daniel Schmidt				Accounting statement:	0.00	Total full payments
Debits		🕹 Credits				
Treatments performed:	0.00	Paid documents:	0.00	Toucherstein aussisse		Dura da barra
Service and products	0.00	Adv. payments to invoice:	0.00	Treatments in progress:	0.00	Due dates: 0.00
				Treatments to perform:	0.00	Past Due dates: 0.00
Total Debit:	0.00	Total Credit:	0.00	Total:	0.00	
• • • • •	[/ # + -				Available in Xinfo
Date: 09/03/2016 De	fault treatment pro	posal of SGP Dollar 0.00				Accounting notes
Tooth Treatment		* Practiti	ioner Status	Price List Amount	Deposits Invoic	
Documents			Deposits to be in	voiced Payment	due dates	
Num. Date	Amount Dep	p. inv. Paid	Date Amoun	t Date	Amount	
						÷ 1
				Ø		
					100 C	

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"

ú	XDENT	Archive	Edit	Multimedia	a Operations	Documents	Accounting	Store	Services	Windows	Help	
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	D		te te	he coll	octod							
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			Note	es:								
				Acc	ount							۹ ۲
												Payment entry
	_	-						-	_	_		



TRAINING GUIDE REFERENCE: Page 141 – 144 / XDENT_User_Guide_v1_2

14. ACCOUNTING

Accounting record represents the main tool to obtain patient-related information in terms of profits and treatments provided at the practice.

For each treatment, the relevant total amount and collected amount are provided. The accounting situation of the patient is displayed against a blue background in the upper portion of the record. The total amount is displayed against a red background if the patient is in debt, otherwise against a green one in credits. All total amounts in the accounting record refer either to the treatment plan currently selected in the plan list or to the accounting record in its entirety.

Nik Koh				Accounting statement:	0.00	Total full payments	*
+ Debits		Credits				1	
Treatments performed:	266.00	Paid documents:	266.00			Dire dahara	
Service and products	0.00	Adv. payments to invoice:	0.00	Treatments in progressi	0.00	Due datest	0.00
				Treatments to perform:	0.00	Part Due dates:	0.00
Total Debit:	266.00	Total Credit:	266.00	Totak	0.00		
		1 ¢ + -				🖌 Av ailabk	e in Xinilo

Invoicing Preferences

To issue invoices, there are some options that can be set from preferences "Accounting record.

Concise description to be mentioned in the invoice: If it exceeds the length of a row, it automatically continues in the following line, which is repeated during formatting

Invoicing notes can be customized, with the possibility to enter what are relevant notes.

Invoices Issue									
with detailed description with concise description	Sun	imary invoice w total in invoice	list		Ų	If a detailed the automat performed t	description i tic creation o treatments wi	is chosen, if invoices will ins ith their corresp	dicate sing onding co:
Synthetic description to be re	sported in the in	voice:				If a concise	description i	is chosen, the im	voice will
Dental treatments						indicate a si treatments.	ingle entry in	cluding all perfo	rmed
Invoicing type:									
Receipt Invoice	Deduce	errores done in the	inunire 🗆 C	house a start in the	he impoir-		a not allow a	an treatment of	dated into a
	Deduce	anality many in the	anvone a	CALCONS IN S				Nor-Distantion-11	
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Characters after invok Rems to be reported in the in Logo:	te: (i.e. 147/A)		CCM XDENT	Select		You can add will be place	d a logo and/ d TopRight o	or text as an im	ault issue age file th
Characters after invok Items to be reported in the in Logo: Notes:	te: (i.e. 147/A) voice:		CCM XDENT	Select		You can add will be place -select the the field if y The logo ms	d a logo and/ d TopRight o logo as a Jor ou don't wan ast cannot es	for text as an im on the print form g, Gif or Png file at to print any log cceed 110x250 p	ault issue age file th c or empty po. xts (height
Characters after invok Rems to be reported in the in Logo: Notes:	te: (i.e. 147/A) voice:		COM XDENT	Select		You can add will be place -select the the field if y The logo ma and width). If the image	d a logo and/ d TopRight o logo as a Jpe ou don't wan ust cannot es size is too la	for text as an im on the print form g. Gif or Png file it to print any log exceed 110×250 g arge, it will be pro	ault issue age file th or empty po. sts (height sportional
Characters after invok Rems to be reported in the in Logo: Notes: Stamp Duty virtual	veice: (i.e. 147/A) veice:		COMIXDENT	Select	ţ.	You can add will be place -select the the field if y The logo m and width). If the image resized.	d a logo and/ d TopRight o logo as a Joe ou don't wan ast cannot es size is too la	ior text as an im on the print form g, Gif or Png file it to print any log ceed 110×250 g arge, it will be pro	ault issue age file th c or empty po. tts (height
Characters after invoid Rems to be reported in the in Logo: Notes: Stamp Outy virtual Profits assessment:	veice: (i.e. 147/A) veice:		COMIXDENT	Select		You can add will be place -select the the field if y The logo m and width). If the image resized.	f a logo and/ d TopRight o logo as a Joe ou don't wan ast cannot en size is too la e print form:	iDel for text as an im on the priot form g, Gi or Png file kcceed 110x250 p arge, it will be pro	age file th c or empty po. ys theight
Characters after invok Rems to be reported in the in Logo: Notes: Samp Duty virtual Profits assessment: Profit margar: 3	voice: ().e. (1/2, 147/A) voice: y paid	tsk management:	COM XDENT	Select	Log	You can add will be place -select the the field if y The logo m and width). If the image resized. go place on th Taxatio	I a logo and/ d TopRight logo as a Jpe ou don't wan sist cannot es size is too la e print form: n:	(Def for text as an im on the priot form on the priot form it to priot any log ceed 110x250 g arge, it will be pro Left 	aukt issue age file th or empty po. sts theight sportional

5. Claim Submissions

TRAINING GUIDE REFERENCE: CGM XDENT Claim Submissions.pdf

	ing Demonstration M	Main Member >	All	Accounti	ng statemen	t: 7.415.1	4		Full pay	vments of a plan
Debits	ng centonisti duon n	Credits			Due date		Accounting	notes	(Turpu	pierre pierre
reatments perform	ed: 8.877.82	Paid documents:	1.462.68	Pa	ast Due date	s: 0.0	D			
ervice and product	s: 0.00	Adv. payments to	invoice: 0.00	Treatment	ts in progres	is: 0.0	D			
				Treatmen	its to perform	m: 905.5	6			
otal Debit:	8,877.82	Total Credit:	1,462.68		Tota	8,320.7				
	0	/ @ + -	-							Available in Xinf
Date: 10/05/2022	Claim Submissions and	d Remittance Demo	mber of 74P 257 79							č3
Tooth Code	Treatment	monscration main mer	Practitioner	Status	Price List	Amount T.R.c	uota Adv. pavm.	Invoices	Diag, Code	Place of services
8145	Local anaesthetic - per	visit	COSMETIC & DENT/	10/05/202	62.03	62.03 0.00	0.00	0.00		Consulting Roon
8101	Oral examination		COSMETIC & DENT/	10/05/202	158.91	158.91 0.00	0.00	0.00	Z00.0	Consulting Roor
8110	Sterilized instrumentati	ion	COSMETIC & DENT/	10/05/202	36.85	36.85 0.00	0.00	0.00		Consulting Room
ocuments		Details Claims				Depo	sits to be invoiced		Payment d	ue dates
Num. Date	Amount Paid	Num.	Date Status	Amour	nt	Date	Amount		Date	Amount
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ate: 06/04/2022	Treatment plan from p Patient: Recording Der	hysical examination monstration Main Mer	nber of ZAR 3,399.31							E9
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Date: 06/04/2022 Date: 15/03/2022 Date: 15/03/2022	Treatment plan from p Patient: Recording Der Demo of 2x vists treat Patient: Recording Der Treatment plan from p	hysical examination monstration Main Mer emnts monstration Main Mer hysical examination	nber of ZAR 3,399.31 nber of ZAR 589.28							29 (1) (1)
Date: 06/04/2022 Date: 15/03/2022 Date: 15/03/2022	Treatment plan from p Patient: Recording Der Demo of 2x vists treat Patient: Recording Der Treatment plan from p Patient: Recording Der	hysical examination monstration Main Mer temnts monstration Main Mer hysical examination monstration Main Mer	nber of ZAR 3,399.31 nber of ZAR 589.28 1ber of ZAR 503.01							29 29 29
Date: 06/04/2022 Date: 15/03/2022 Date: 15/03/2022 Date: 11/03/2022	 Treatment plan from p Patient: Recording Der Demo of 2x vists treat Patient: Recording Der Treatment plan from p Patient: Recording Der New treatment plan 	ohysical examination monstration Main Mer temnts monstration Main Mer hysical examination monstration Main Mer	nber of ZAR 3,399.31 nber of ZAR 589.28 nber of ZAR 503.01							49 45 65 65
Date: 06/04/2022 Date: 15/03/2022 Date: 15/03/2022 Date: 11/03/2022	Treatment plan from p Patient: Recording Der Demo of 2x vists treat Patient: Recording Der Treatment plan from p Patient: Recording Der New treatment plan Patient: Recording Der	hysical examination monstration Main Mer temnts monstration Main Mer hysical examination monstration Main Mer monstration Main Mer	nber of ZAR 3,399.31 nber of ZAR 589.28 nber of ZAR 503.01 1ber of ZAR 500.00							20 20 20 20

6. Payments

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."

				Accounting statement:	0.00	Total full payments	
Debits		👽 Credits					
Treatments performed:	0.00	Paid documents:	0.00	Transments in programs:	0.00	Due datas:	0.00
Service and products	0.00	Adv. payments to invoice:	0.00	Treatments in progress.	0.00	Due dates.	0.00
				Treatments to perform:	0.00	Past Due dates:	0.00
Total Debit:	0.00	Total Credit:	0.00	Total:	0.00		
9 9 9 0		/ # + -				Availa	ble in Xinfo
Date: 09/03/2016 D	efault treatment prop	posal of SGP Dollar 0.00				Acco	unting notes
Tooth Treatment		* Practiti	oner Status	Price List Amount E	eposits Invoice		
				+	Ľ	2	
	_				-		

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"

• • •			Due dates to be	cashed		
Payments	to be collect	ed				
Due date 🔺	Amount	Customer		Description		
	Q Filter:	1	6		Select all	
		Total selected	due date amount	: 0.00		
Payment de	tails					
C	ate: 17/3/1	6 Type:	Lheque	0	Amount:	0.00
No	tes:					
					-	-

TRAINING GUIDE REFERENCE: Page 18 / XDENT Quick User Guide v0.9_20160317

		Scheda	Contabile							
Campisi Alessia			1	iituazione	contabile:		0,00	🗧 Saldi (del piano com	renke 👘
🔶 Debiti	🕹 Crediti						1			
Prestazioni eseguite: 0,00	Documenti pogati:	0,00		Prestazi	oni in corso:	(0,00	Totale s	cadorus:	0,00
	Acconti de fatturare:	0,00	1	Prestazioni	da eseguire:	1.400	0,00	Totale	scaduto:	0,00
Totale Debiti: 0,00	Totale Crediti:	0,00			Totale:	1.400	0,00			
	10-								🔄 Visibile	in Xinfo
Pata: 09/10/2013 Nuovo piano di trat	tamento - Preventivo n. 1	di Euro 1.400,00		_				120	Annotazi	oni contabili
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16 Impianto osteointegrato		DR. VERDI	da eseguire	700,00	700,00	0,00	0,00			
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Data: 12/09/2013 Proposta di trattam	ento predefinito di Euro 13	8.700.00						8		
Sitampa Fattura Acconte Fattura	s Salde Nota di credi	te					-		Annulla	Conferma

TRAINING GUIDE REFERENCE: Page 141 – 144 / XDENT_User_Guide_v1_2

	Invoice						- 🗆 🗙
Type: Trype: Type:	Customer	Ni, Ke 171. O 169877	AS HIN SWEE RDAD 7-SINBAPORE	(SAN CENTRE)			
Nurber 81 / 💌		iRIC ∉/Par	ssport# S860	00002	_	DRN 19	
Date: 12/10/16	Payment	Cash					v
	Store						۹
Detail Footes							
DETAIL			Bar code:		+	- //	+ Presiron
Code Description	0.5	ми	Price	T.P. Payer	\$VAT_	& Discount 1	l otal
PDC complete denture acrylic each jaw PH4SES	1		1.200.00	0.00	0	0.00	1.200.00
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					TA	XABLE INCOME	1,200.00
Print the following synthetic description in the document						VAT	0.00
^						OTAL AMOUNT	1,200.00
					P	ATIENT TOTAL	0.00
					T.P	PAYER TOTAL	0.00
							Hound of
🖶 Print 🔲 Send email						Cancel	Canfirm
						1	

How to issue Medical Certificate for a Patient in XDENT?

Patient Record > Medical Certificate

MEDICAL CERTIFICATE will allow you to generate an official Medical leave document for that Patient. After generating the MC, print and the Practitioner is required to endorse it with a signature. Enter Start Date, Day Taken, and Reason and select Practitioner.

×	Medical Certificate		-		×
Issuer:	CGM Singapore				
Document #:	6	Date of visit: 17/08/2016			
Patient: Sam Sung (M	NRIC #:S8600000Z)	Date of birth: 01/01/1980			
Start date:	÷ 10/08/2016	Day(s) taken:		\$	3
End date:	12/08/2016				
Reason:					~
Practitioner:	DR. KEWAL PRADHAN				
	Dr. Kewal Pradhan				
			Co	nfirm	

13.5 Medical Certificates

How to View and Re-Print Medical Certificate in XDENT?

To View, go to Documents > Medical Certificate

It will show the list of all the Medical Certificate that has been created in XDENT. To print the MC again, either double click on MC or select the record and click Consult button.

80		List of	Medical Certificates		
Issued cert	tificates by:	SM Singapore		2016 v	
Date	Number v	Patient	Practitioner	Void	
17/08/2016	7	Sam Sung (NRIC #:S86000002)	DR. KEWAL PRADHAN		~
17/08/2016	6	Sam Sung (NRIC #:SB6000002)	DR. KEWAL PRADHAN	17/08/2016	
26/07/2016	6	Edith Lin (NRIC #:S7952214E)	DR. KEWAL PRADHAN		
21/07/2016	4	Nichael Mint (NRIE #S7989894E)	DR. KEWAL PRADHAN		
20/07/2016	з	Kewal (NRIE #:S86000002)	DR. KEWAL PRADHAN		
20/07/2016	2	Kewal	DR. KEWAL PRADHAN	20/07/2016	
20/07/2016	1	Kewal	DR. KEWAL PRADHAN	26/07/2016	
					Ų
Q+ Pati	ant			Void Consult	

8. Reporting

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 postprocess.

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

Accounting reports					- 🗆	×
	ING STATS (in a given tir	mespan)				
Accounting	Bill books	Practitioners	Treatments	Quotations		
From	n: 01/07/20	🗆 All d	ates until to : 3	1/07/20		
Sales Volume Revenue	Revenues Detail Pay	ment Income/Expe	enditure Claim status	Age Analysis Ov	erdues	
Total sales volume in the	timespan	Invoicing items	s detail			
All issuers	O By issuer				Q	
All patients	O By patient				Q	
All ref. practitioners	O By ref. practitioner				Q	
All Reference person	(s) O By Reference perso	n			Q,	
With payments						
All payments types	 By payment type 				Q	
All types	O By type				Q	
All practitioners	O By practitioner				Q	
 Monthly 	r sales volume 🔿 Da	aily sales volume	Invoices in the time	span 🔳 Repor	t	

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"

	OUNTING STATS (in a given timesp				
Accounting	Bill books	Pra	ictitioners	Treatments	Quotations	
	From: 05/08/2	0	🗌 All dat	es until to :	05/08/20	
ales Volume Rev	renue Revenues	Detail Paymen	t Income/Expen	diture Claim status	Age Analysis Overd	lues
View by	Patients	Filter by	/ patient:		v	0,
	O Third Party P	ayers Filter by	y TP Payer:			Q,
Show details						
Aging buckets	All	🔘 30+ days	⊖ 60+ days	⊖ 90+ days	🔿 120+ days	
Order by	Account No.	O Account Nam	ie			
					Report	1

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 data sheets for a possible postprocess.

- 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

TRAINING GUIDE REFERENCE: Page 121 – 126 / Full Guide_XDENT_English_Clinical

1 Counting	Bill books Practitioners Treatments Quotations
	From: 19/01/17 🗘 🎆 🛛 All dates until to : 19/01/17 🗘 🚍
	Quotas Treatments Treatments performed Output
All Clinic manag	ers All Group Supervisors All Practitioners All Sales Representatives All Reference person(s)

9. Emails and SMS (Communications / CRM) *TRAINING GUIDE REFERENCE:* Page 21 / XDENT Quick User Guide v0.9_20160317

The Callback feature allows you to add automatic patient recalls. You can specify the type of call and XDENT will automatically alert you by the CRM window when a patient is to be recalled. Alternatively, you can schedule automatic SMS or XINFO App reminders to go out.

CRM						
° 🖠		Practitioner: PRACTITIONER #1	Patients Agenda Res	ources Treatments Mu	ltimedia CRM Documents Accounting	Etock Report Services
🔁 Commi	unication Centre					- 0 ×
Commu	nication Centre	Q , rearch addressee 🛛 🔞	Multiple (Communications	Communic	calved 🔮 News 📼 cations 🛫 management 📼	Communication 🛜
All months	 All years 	*	•	Send today	To send Sent and Closed	Sent and Opened
Addressee		Туре	Applicant	Expected date 🔺	Notes	
900 SMS message To send	Dicapio 02/02/2002 Mob.: +60123456789 Phone no.: 03456789012		Smith John	14/03/2016	Follow up treatment	^
go SMS message To wend	Dicapio 02/02/2002 Mob.: +60123456789 Phone no.: 03456789012		PRACTITIONER #1	14/03/2016	Re schedule	
SMS message Send today	Razak 02/02/1977 Mob.: +60134567890		Administrator	15/03/2016	Please come again	

TRAINING GUIDE REFERENCE: Page 70 / XDENT_User_Guide_v1_2

How to View Patient Communication from Patient Record? Patient Record > CRM

CRM is a communication Center which includes all the CRM functions of the office and therefore manages all the Practice/Patient interaction modes in both communication directions.

For more detail (Refer # 12.1)

20				Recall list				- 0 ×
Communication	Centre	Q.+ SmSurg	0	Nultiple Communications	Communi	ootived 🐣	News nonagement	Communication 奈
All months 💌	All years		М	 Send today 	• To send	Seni today	Sent and Opened	Sent and Closed
Sending date and Addressee		Type		Applicant	Espected data A	Notex		
Closed 01/01/1980 15/05/2016 Phone no.: 9	1291305	Guard Phase 2		Pradhan Kewal	15/08/2016			~
SMS message To sent	1291306	Recall after 90 day	5	Pradhan Kewal	15/11/2016			
Add Delete	Report 2	conversioné listed.			1			Control Served

How to send reminder to the Patient for the appointment Scheduled today and next day?

Click the "message" button of the lower side of Schedule Screen and send a reminder to today and tomorrow-scheduled patients via SMS.

Default message text can be managed from XDENT general setting, under the communication tab (Refer # 4,4)

	Sending Comm	unications
	lessages	
Send reminde	rs for the appoinments on	: today: whole day 🗸 🗸
only patients	with SMS service enabled in th	he pail today: morning today: afternoon
Sender:	XDENT	today: whole day tomorrow, whole day
Message text	«Name), your denlist remind «Current date» at «hirum». 160 charactere ma-	9 your oppointment on A
0 SMS to s	end SMS sent]
0		0
Notificati	ions to send	Notifications sent
Close		Abort Confirm

TRAINING GUIDE REFERENCE: Page 121 – 128 / XDENT_User_Guide_v1_2

How to Manage Multiple Communication for a Patient in XDENT?

Communication Centre > Multiple Communication

In the multiple communication, a communication can be sent to more than one selected user based on some default criteria or by manually selecting them.

-			Communication Centre – 🗖 💌
Communications	to Patient	5	Nutice 🖸 Received 🕈 New 💷 Communication 🖘
All Bitholays Not reserved Patents with debts Unspect due dotos Al least one Accepted Quoteris	21	> <	Applicant: PlothonKeval Q Type: Type not defined v Notesi
Q.			Pasitioner v Patient v Today 🐹 👔 🕼 Character v B I U Q
Andrew Lim	Phone no.	+6591291308 ^	Nezzapez Later Ernal
CHAS Blue Ter Patient CHAS Orange Tier Patient CHAS Pioneer Patient District Education	+656386672 +656386672 +656386672	+6594285923 +6594285923 +6594285923	
Edith Lin James Wong Jernifer Lee	+656386672	+6594285923 +6591234860 +6591234860	
s VbA 😜	5	Delete 🛧	
hane A	Phone no.	Mobile A	
¢		•	Available characters
Selected patients:	a		C. Servi

1. Managing Communications

When a new Communication Centre is opened, all inbound and out bound communications managed by the office are shown for a desired the range.

Mese: Tutti	t Tutti	🕖 🕇 🔲 Nascondi Reci	all appuntamenti	Da invi	are Da Inviare oggi	Inviati oggi
Destinatario	Cell.e.Tel.	Tipo	Richiedente	Data 🛛 🔻	Note	Stato
Primerano Francesco	Cell.: +3933324232425 Tel.: 023123456			29/12/2012		Ca.inviare
Primerano Francesco	Cell.: +393332423242; Tel.: 023123456	filtra per destinatario della comunicazione	Dr. Verdi	17/12/2012	chiedere analisi del sangue	C 17/12/2012
Primerano Francesco	Cell.: +3933324232423 Tel.: 023123456	filtro di riceca per		17/12/2012	stato della comunicazione: -eflettuata il 17/12/12 alle ore 00:46 tramite telefono	U 17/12/2012
Campisi Alessia	Cell.: +3933432232343 Tel.: 067512345523	mese e anno		17/12/2012		17/12/2012
Bianchi Virginia	Cell.: +3933312344556 Tel.: 093212344567			17/12/2012		17/12/2012 00:46
Primerano Francesco	Cell.: +3933324232421 Tel.: 023123456			17/12/2012	/	Oa inviare
Campisi Alessia	Cell: +3933432232343 Tel: 067512345523		modalità di invio delle comunicazioni	17/12/2012	stato della comunicazione: da inviare	Oa inviare
Bianchi Virginia	Cell.: +3933312344556 Tel.: 093212344567			17/12/2012		Oa.inviare
Bianchi Virginia	Cell.: +3933312344556 Tel.: 093212344567			17/12/2012		L 17/12/2012 00:46