# Win∨oice Junior<sup>Tm</sup> Demo Manual

This document contains a brief run-through of how to use the major functions of **Win∨oice Junior<sup>Tm</sup>**.  You should read over it throughly before installing the software on your computer.

At time of purchase, a concise user's manual is shipped along with the registered version of the software.  This manual gives every detail about the software in an easy to read format.  You may also wish to look at the online help included with the software.

If you need assistance installing, or questions concerning the software, feel free to call our technical support line at **(918) 627-5395** or FAX us at **(918) 627-7842.**  Please be by the computer with the install disk handy before calling the tech support line.

# Introduction

**Win**∨**oice** dental laboratory invoicing and billing software was released in 1995 with a market targeted to medium sized to large dental laboratories.  **Win**∨**oice** first became available in two packages, a Single User package, **Win**∨**oicePro**, ideal for labs with only one computer and a Network package, **Win**∨**oiceNet**, for large labs with many computers.  Both allow for the accounting of  multiple companies and have a vast array of employee and production reporting.

Soon after the release of **Win**∨**oice** it became apparent that there was a need for a program with less sophistication that would better accommodate the unique needs of smaller labs.  **Win**∨**oiceLITE** was created by trimming away features of the full package, ones that small dental laboratories told us they didn't require.  **Win**∨**oiceLITE** is an excellent package suited for the smaller lab that is interested in automatic scheduling and employee production concerns.  But, it still has the vast configurability and flexibility of its larger cousins and is designed for users with a fair amount of computer experience.

**Win**∨**oiceJR**  took simplification a bit farther, it too was created to accommodate the needs of a small lab, but special interest was taken to address the fact that small lab owners are very busy and may possess little or no computer related skills.  **Win**∨**oiceJR**  is ideal for the 1 or 2 man laboratory that wants an invoicing and billing system designed for the unique way dental labs do business, is quick and easy to install, with virtually no preconfiguration required nor any computer skills needed.

**Win**∨**oiceJR** is the smartest, easiest to install, and operate of all dental lab programs.  **Win**∨**oiceJR** memorizes restorations, metals and materials, their respective prices and how they relate to each doctor as you create invoices.  The next invoice you create, you are able to select items from ones previously memorized or type in new ones, (that are automatically added to the list).  The more invoices you create the smarter **Win**∨**oiceJR** gets!

This printing contains excerpts from the **Win**∨**oice** users manual and is only intended to assist you in creating invoices for trial purposes.  The full registered manual fully details every element of **Win**∨**oicJR**.  The disk you have received includes dummy data that can be modified to represent your restorations, miscellaneous charges, metals and prices.  You may remove these already memorized lists by using the auxiliary program included with **Win**∨**oicJR** called *Brainwash* that resides in the same program group as **Win**∨**oicJR**.

# Installation

## Windows 95 & Windows NT

To install **Win**∨**oiceJR**, insert the floppy in your disk drive. Click on the *Start* button.  Click on the *Run* item.  Type in "**A:SETUP**" or "**B:SETUP**" depending upon which drive you have the disk inserted into.  Click the *OK* button.  **Win**∨**oiceJR** will then display a licensing agreement, please read the licensing agreement in it's entirety.  If you agree to the terms, click the *I agree* button.  The installation program will then ask for the source and destination paths.  Accept the defaults by clicking the *Continue* button.

The next prompt allows you to enter your company name for registration purposes.  ***Be very careful when entering your company name as it can NOT be changed later and it is printed on all work tickets and reports!***  You will be asked for confirmation of the company name.  Be absolutely sure that there is no typographical errors.  Upon confirming the company name, the setup program will install **Win**∨**oiceJR** into the destination directory and create a new folder named *WinVoice* which will include a shortcut named ***WinVoice Junior.*.*

To run **Win**∨**oiceJR**, click on the *Start* button, move to the *Programs* folder, then to the *WinVoice* folder, then click on the ***WinVoice Junior*** shortcut.  Note: there is a second short cut named ***WinVoice NoTheme***, it is meant for slower computers(386/486).  Instead of using the highly graphical(and slow) themes, it uses a quick menu bar to access all of **Win**∨**oiceJR**'s features.  You may run either shortcut depending on your tastes.

# Windows v3.1

To install **Win**∨**oiceJR**, insert the floppy in your disk drive. Click on the *File* menu of program manager.  Click on the *Run* item under the file menu.  Type in "**A:SETUP**" or "**B:SETUP**" depending on which drive you have the disk inserted into. Click the *OK* button,  **Win**∨**oiceJR** will then display a licensing agreement, please read this agreement in it's entirety.  If you agree to the terms, click the *I agree* button.  The installation program will then ask for the source and destination paths. Accept the defaults by clicking the *Continue* button.

The next prompt allows you to enter your company's name for registration purposes.  ***Be very careful when entering your company name as it can NOT be changed later and is printed on all cases and reports!***  You will be asked for confirmation of the company's name, be absolutely sure there are no typographical errors.  Upon confirming the company name, the setup program will install **Win**∨**oiceJR** into the destination directory and create a new group named *WinVoice* that will include an icon named ***WinVoice Junior.***.  To run **Win**∨**oiceJR**, double click on the ***WinVoice Junior*** icon.

Note: there is a second icon named ***WinVoice NoTheme***, it is meant for slower computers(386/486's 33 MHZ or slower). Instead of using the highly graphical(and slow) themes, it uses a menu bar to access all of **Win**∨**oiceJR**'s features.

# Running for the first time

This section will describe how to get up and running with **Win**∨**oiceJR** in the shortest amount of time.  Grab a case that needs to be invoiced, reserve about an hour of your time and you'll soon be a **Win**∨**oiceJR** master!

When **Win**∨**oiceJR** is executed for the first time, you will be asked if you would like to use cue cards or not.  Cue cards will provide on screen cues of various functions of **Win**∨**oiceJR**, so select "Yes", (you can turn Cue cards and Sounds OFF later if you so desire, by clicking on the *Config* button and then clicking on the appropriate button).  You can change the location of a Cue card dialog by clicking on the bold heading border of the Cue card and dragging the dialog to a different location on your screen.

After selecting "Yes", you will be prompted to choose a theme if you are not using the *NoTheme* shortcut.
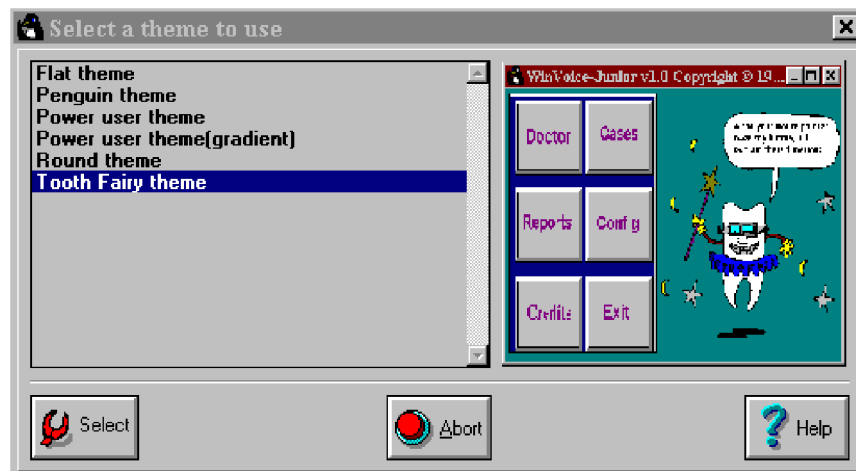


Themes are various desktops (user interfaces) that are used by **Win**∨**oiceJR**. Each theme has a distinctive "style" and contains different sets of control buttons, backgrounds, and sounds.  You have several choices of themes.  Don't worry about deciding which one is best for you right now as themes can be changed later.  For the moment, let's select the "Tooth Fairy theme".  Highlight "Tooth Fairy theme" and click the *Select* button.

After a theme has been selected, **Win**∨**oiceJR** will ask your company information.  And then you will be at the main **Win**∨**oiceJR** desktop.  From there, you can select all of **Win**∨**oiceJR**'s features.

# Doctors

If at this time you are only interested in invoicing the pile of cases that have been building up while you have been shopping for software, the first step is to begin entering your doctors (customers). To do so, move your mouse arrow to the *Doctor* button and click the left mouse button. The Doctor's list dialog will appear.
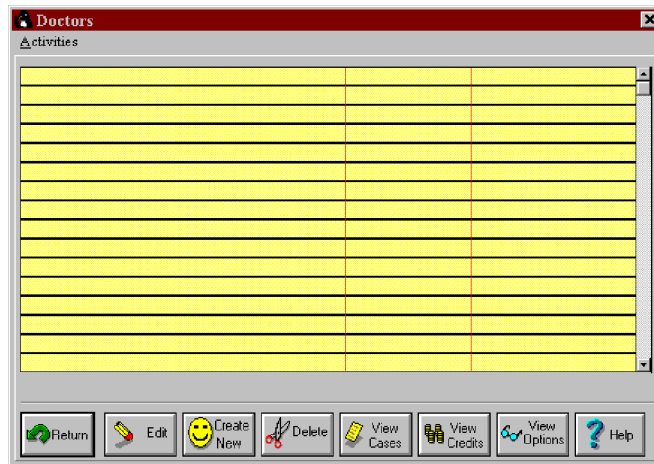


All dialog boxes in Junior have similar elements, you have a top half which contains lists you can select items in, and at the bottom, a row of buttons of functions you can preform on the list. Click the *Create New* button to enter a new doctor. When you do, you will be presented with the Create/Edit Doctor dialog.



It should be noted that your list of doctors will be sorted by the first characters entered into the field from left to right. Therefore, we suggest that you enter your doctor's names as such: LAST NAME, DR. FIRST NAME, INITIAL. Each doctor name must be unique. If you have more than one doctor with the exact same name, add information after the name that uniquely identifies them(such as city).

The boxes in the lower left hand corner is the opening balances for this doctor. If you know this doctor's ageing history, enter the proper amounts the 30, 60 and 90+ balance columns. When amounts are entered into these fields the "Total balance" field will display the total. This should equal what the doctor owes your lab to date, less his/her cases in production. If you do not know the ageing history, enter the doctors last statement balance in the "30" line. You can enter this information later. Just make sure you enter it before ending the month.

Fill in the information for your first doctor from the case you have in front of you. When finished, click the *Save* button. This doctor will now appear in the doctors list. When you have time, you should enter all of your accounts in the same fashion. For now, click the Return button to go back to the **Win**∨**oiceJR** desktop.

# Cases

Click the Case button from the desktop.  This brings you to the list of cases.
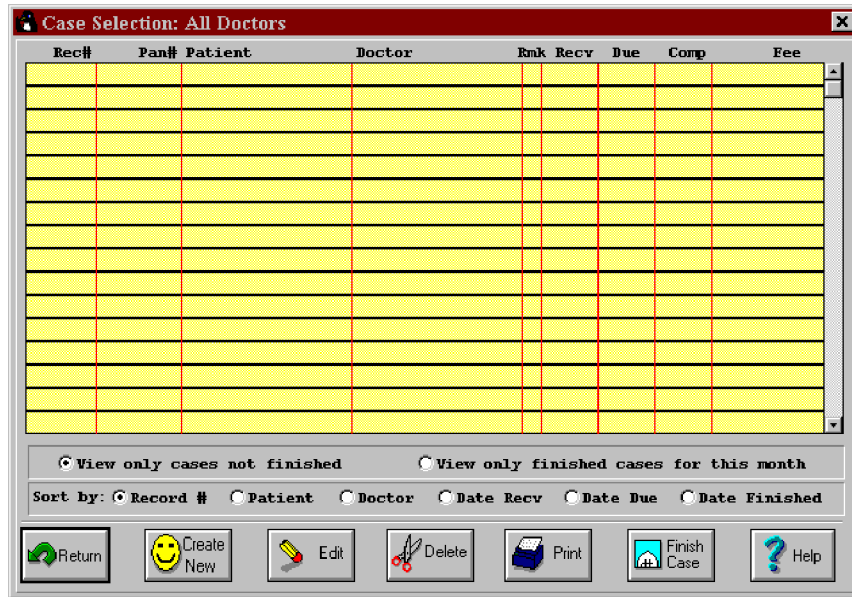


This buttons right below the list tell **Win∨oiceJR** how you would like to view the list.  Please note that the list is really broken down into TWO separate lists.  One list contains finished cases.  These are the cases that have been completed and sent back to the doctor.  The other, unfinished, is the work you still have in production.  If you are looking for a case, be sure to check BOTH lists to see the current status of that case.

At this time we want to enter the case in front of you into **Win∨oiceJR**, lets click the *Create New* button.
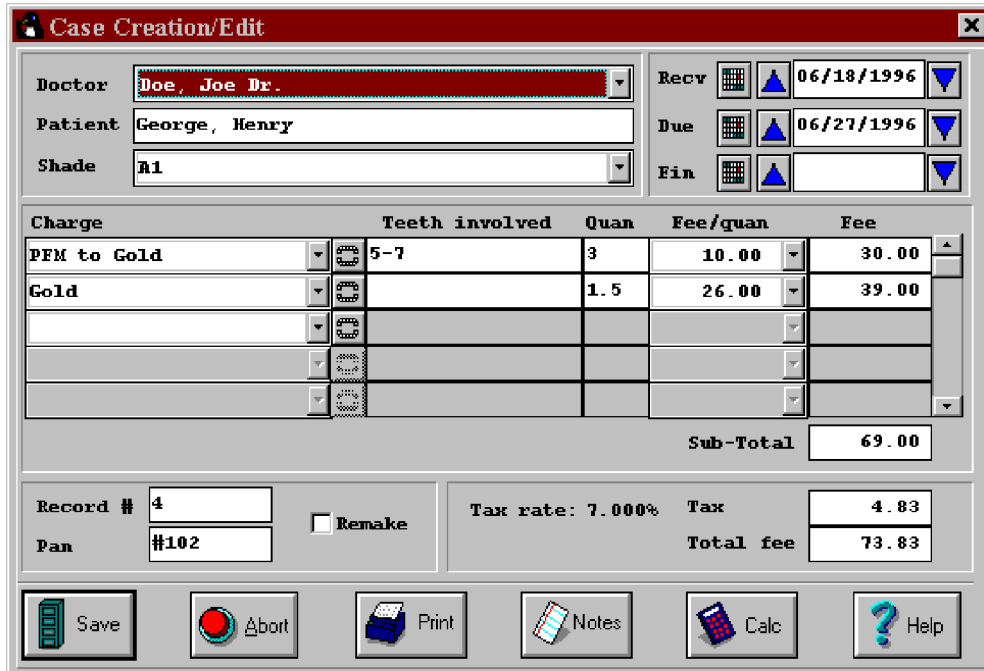


The upper left hand section allows you to select a doctor, fill in patient name, and enter the shade type.  The very first thing you should do when creating a case is to select the doctor.  This lets **Win∨oiceJR** know what memorized price list to use and the tax rate if any.   There are several ways of selecting the doctor,  you can click on the small arrow button to the right of the *Doctor* line to bring down your list of doctors, then click on the correct doctor.  You can begin typing the name of the doctor,

when enough letters are typed to allow **Win**∨**oiceJR** to recognize which doctor you are typing, he will complete typing for you.  Or, you can use your down arrow key to move down the doctor list until the correct doctor is highlighted and press the enter key.  Use the method that is most comfortable for you.

The patient's name is printed on the doctor's statement and should be entered for each case to help the doctor identify the case for payment.  If this doctor's office uses a special identifying number for cases, you might want to also enter it after the patient's name in this field.

Next, let's type in this case's shade type, if any. The shade field is one of **Win**∨**oiceJR**'s unique "memorizing" fields.  You can tell the difference between a "memorizing" field and a "list" field by the small grey outline inside the box where text appears (in Windows 3.1, the arrow to the right is separated by a small space from the text box on the left).  In a memorizing field, you have the choice of entering a new type or, you may click on the small arrow button to the right of the line to see types you've previously entered.

The fields to the right of doctor/patient/shade are date fields.  "Recv" is the date the case is received.  "Due" is when you expect the case to be finished.  "Finished" is when the case is actualy completed and sent to the doctor.  To change these date fields you may:

1) Click on the ▦ button to be presented with a calendar where you can select the year, month, and day.
2) Click on the ▲ or ▼ buttons to move up or down a day at a time.

A few notes about finished date:  This is the date that the case was completed and posted to the doctor's billing account.  Most labs enter cases soon after they are received and later indicate that the case is finished.  However, you may wish to enter cases when you are finished with them.  If this case has already been finished, enter a finished date, otherwise, leave the finished date field blank to be filled in when case is finished. *A case is NOT posted to a doctor's billing account (will not appear on his/her statement) until a finished date has been entered.*

The middle section of this dialog  is where you create all charges that will appear on the doctor's invoice.  You may have up to 20 charges on a single case.  This means you can get as creative as you wish when invoicing a case.  You may list all procedures to be  performed individually, or combine several procedures into one charge.  Typically, you'll want to do this the same as you've been filling out paper invoices.

To begin invoicing a case, type in the name of the restoration, product or service on the first line in the *Charge* column. Notice, this is a "memorized" field, as you enter charges, **Win**∨**oiceJR** will remember them for easy selection the next time you invoice a case to this doctor.  **Win**∨**oiceJR** comes with examples of charges.  The numbers in front of the example charges are used to show that **Win**∨**oiceJR** can use "codes" as other softwares do for quick lookup, but they are not necessary.  Just type your charges in, as you normally hand-write them.  If you wish to remove the example charges, use the *Brainwash* shortcut in the *WinVoice* folder.

Once you have entered a charge, press the Enter key, the cursor will move to the Tooth Chart button 🦷 (or click on this button).  You will then be presented with the Tooth Chart dialog.
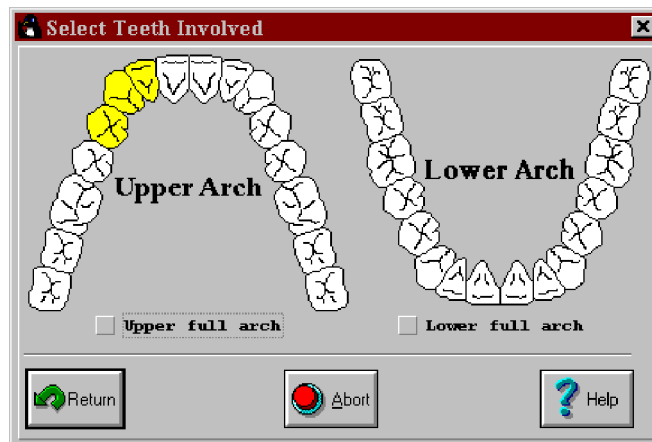


Click on the tooth/teeth that represent the charge and then click the *Return* button.  The "Teeth involved" line will

automatically fill with the tooth numbers selected and the "Quan" field will fill with the quantity of teeth indicated on the Tooth Chart. The *Quan* field will now be highlighted, you can change it if needed to match the quantity that is to be charged for. **Win∨oiceJR** will remember this the next time you select the same charge. Example: If you select an entire arch and enter a quantity of 1, **Win∨oiceJR** remembers that the fee for this charge type should be based on each arch). If you do not select any teeth and enter a quantity with a decimal place(ex 1.7), then **Win∨oiceJR** will remember this charge as a 'metal" charge.

After entering the quantity, enter the "Fee/Quan" field. Once entered, the *Fee* field will change to reflect the quantity multiplied by the fee. This is another memorized field and the next time you create this charge, the fee will be displayed automatically, (it can be overridden if necessary). You will soon see that **Win∨oiceJR**'s photographic memory will make case entry faster after each and every session.

**Note: A negative number can be entered into the Quan/Fee field. This allows you to easily generate discounts or billing adjustments when invoicing.**

You can now enter other charges for this case if any. In our above example let's assume that we need to charge for metal used for this case. Don't select teeth on the Tooth Chart, just enter a weight into the "Quan" field. **Win∨oiceJR** will multiply the Quan times the Fee/Quan and arrive at the total metal fee. Example: 1.7dwt X $17.50 will total $29.50. It doesn't matter if you weigh your metal in DWT's or grams. If you use grams in the *Quan* field, make sure that the Fee/Quan is in fee per gram, if you use penny weights in the *Quan* field, make sure the Fee/Quan is per penny weight.

As you fill in charges, you will notice that **Win∨oiceJR** automatically calculates the sub-total, then calculate the tax, and displays the grand total in the box just below the charges box.

When you are finished entering charges, you can enter a Pan number if you wish. The Pan number is recorded and printed on the invoice and can contain letters or numbers. You can also change the Record number if you wish, it should be noted that if you elect to change the Record number, the next case that is created, **Win∨oiceJR** will increment the number by one. This enables you to start your record number where your old paper system left off.

The button line allows you to Save the case, Abort the case, Print the case, enter Notes about the case, or pop up an electronic calculator.

# Printing

This case has now been completely created, let's now print it. Clicking the *Print* button displays the Select Print Format dialog.
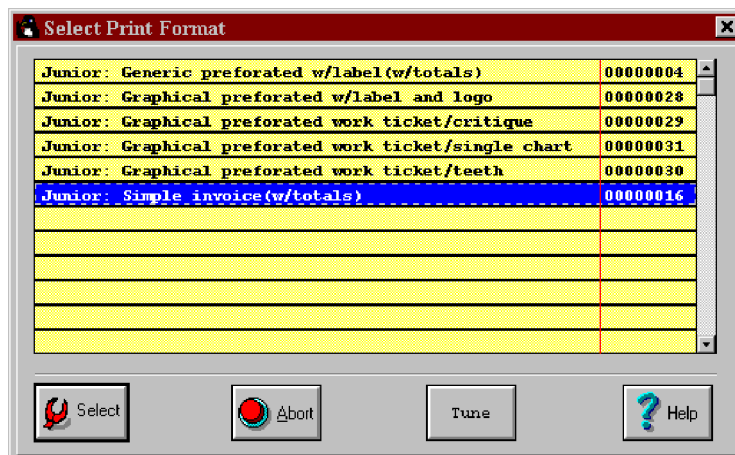


This dialog contains the different methods by which you may print. **Win∨oiceJR** uses what we call TPF's to tell your printer how to print the field information on a sheet of paper/form. TPF's are predesigned print formats and can be customized for your lab if necessary. Your company logo can be embedded in a TPF and will be printed on every case (invoice/work ticket) printed. Contact the **Win∨oice Sales** for additional information on a Custom TPF.

You may print a case as many times as you wish with as many different print formats as you wish. This can allow you to print

a work ticket when you first create the case and an invoice when you finish the case. The "Generic perforated" TPF that is included with **Win∨oiceJR** is designed to print on the three part piece of paper that can be purchased from **Win∨oice Sales**. One part is a work ticket, another is an invoice, and the last is a mailing label. Since the paper is perforated, the sections are easily separated. You can keep the work ticket for your records, include the invoice with the completed case and use the mailing label on the outside of the return package for easy delivery or shipping. This is the blue faded paper in the set of example print outs.

Simply highlight the print format you wish to use and click the *Select* button. You will then be presented with the Windows select printer dialog.
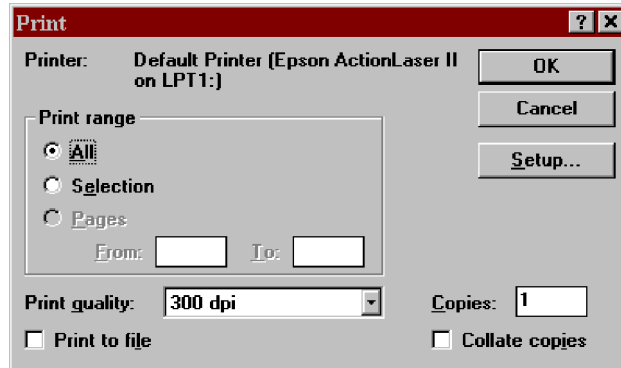


This dialog will be displayed before **Win∨oiceJR** prints anything. You use it to switch between different printers and print options quickly and easily. For instance, you might want to use a cheap dot matrix printer in 60 dpi draft quality mode to print your invoices and use a laser printer in 600 dpi mode to print statements. As long as the proper Windows print driver exists on your system, **Win∨oiceJR** can print to your printer. **Note: Not all print drivers support graphic printing.** If yours does not initially print graphics properly, first make sure all print settings are set for maximum resolution and shading via the setup button on this dialog. If you are using an HP 600 series of printers, and installed the printer driver that was included with the printer, you may need to switch to the less buggy HP LaserJet IIIP driver that is included with Windows to print properly.

# Statements

The reports button from the desktop allow you to get information on your business. The main report you will be interested in, would be Statements. Statements are divided up into two lists(simular to how cases are divided). One list contains "this months" information, the other "last month". At the end of your billing cycle, you should first verify all of the information in "this months" statements are correct, then click the "End Month" button on the statement dialog. This moves all of the information from "this month" to "last month". Then you can click the "Print" button and select "last months" statements, send these to your doctors.

# Conclusion

We hope that you enjoy using the **Win∨oiceJR Demo** and soon join the many labs taking advantage of the latest, state of the art dental lab software packages available to the industry! If you need any assistance with installing, setup, or using of this demo, please feel free to call our technical support line at **(918)627-5395**.

If you decide to purchase the software, contact us at 1-800-665-0091 (918)665-7326. There are two options when purchasing **Win∨oiceJR** after installing the demo. You can either elect to purchase the "upgrade" or the "install". The "Upgrade" will register the software, but leave all of the doctors, cases, charges, etc you've already entered. The "Install" is a brand new copy of the registered version, which means it will overwrite all of your information with the example information.

# Happy computing!