durban
dental laboratories

v12

Customer Portal
User Guide

Contents

durban
dental laboratories

Registration & Login

Register to gain access to all of your case and payment information.

Registration

1. In a browser, navigate to the portal with the link provided by your lab.

2. In the navigation bar, select Not a Member ? Sign Up which will lead you to the following screen:
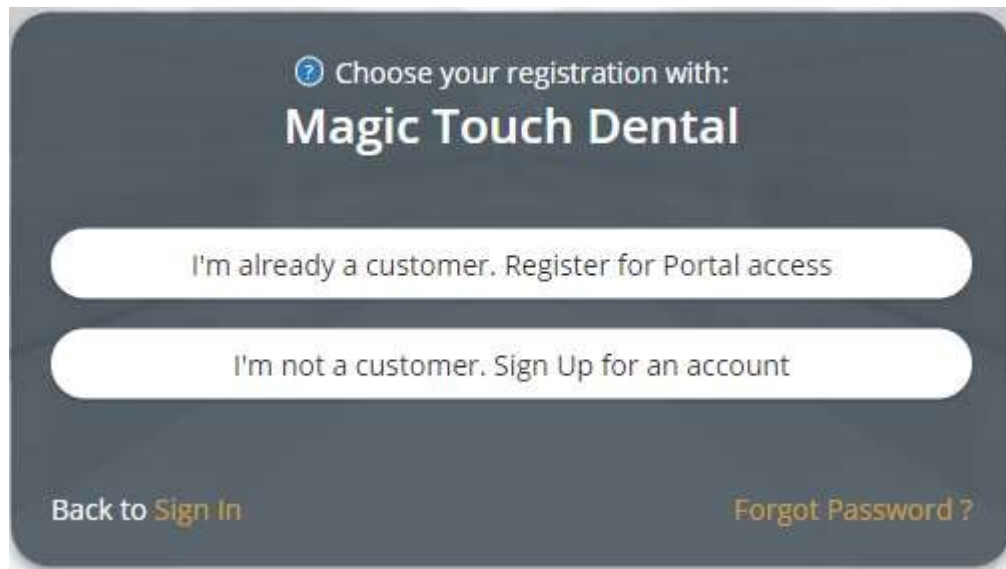
Select the option for I'm already a customer. Register for Portal access.

3. The registration account window will open up requesting the following values:

- Account #

- Account email

- Account office phone
- Last payment amount

- Username

- Password

- Retype Password

- Verification image code

Thank you for registering with
Magic Touch Dental

Account Information

| account number | account email |

| account office phone | last payment amount |

Choose your login credentials

| username | Verify |

| password | retype password |

4F 5 6W

type the image code

REGISTER

Back to Sign In   Forgot Password ?

Login

1. Once you have successfully registered, enter your registered username & password.

2. Click on   LOGIN

Forgot Password

1. In the event that you forgot your password, simply proceed to the Customer Portal login screen and select the   Forgot Password ?   button.

2. This will direct you to the following page:

3. Once you have selected Reset Password, an email will be sent to you with a new temporary password. After recovering access, you may reset your password.

Reset Password

1. On the main navigation bar, select the Settings menu and choose the Reset Password menu option.
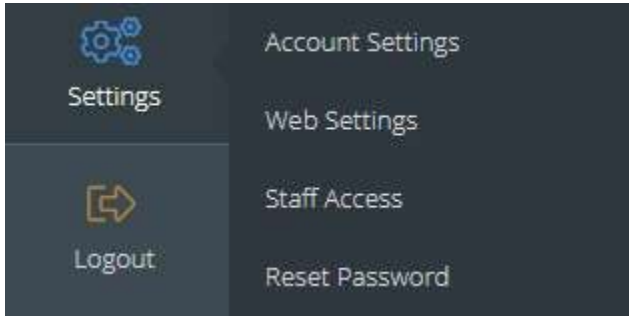
2. The following form will open allowing for you to enter your new credentials. Please note, your current password is required to set a new password.

3.

Accounting

This section can be used to make payments on invoices.

It can also be used to view previous payments & statements.

Make a payment

1. From the main navigation bar, select the Accounting menu.
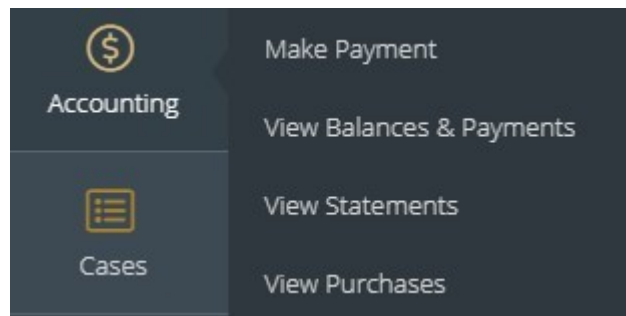
2. Select the Make Payment button

3. In the Make Payments page, you can:
    - Pay total balance
    - Pay balance due now
    - Pay past due balances
    - Pay a specific amount
    - Pay specific invoices
    - Enter payment notes

4. Payments can be processed by
    - Credit Card payments
    - eCheck Payments

5. Additionally, you can opt to save Credit Card/eCheck information on file to use for future transactions.

6. To process a payment:
    - Select payment type (eCheck or Credit Card)

- Enter payment information

- Enter Billing Name & Address
- Select Payment type (Selected, Total balance, or a specific amount)

- If you choose "Pay Selected Invoices", ensure that you check the box next to each invoice that you wish to pay.

- Process payment

View Balances & Payments

1. From the main navigation bar, select the Accounting menu.

2. Select the View balances & payments menu option.

3. This page displays the following summary fields:
    - Recent activities
    - Aging Summary
    - Payments & Credits

View Statements

1. From the main navigation bar, select the Accounting menu.

2. Select the View Statements menu option.

3. Select the statement period you would like to view and a new browser window will open with the statement to view, print or download.

View Purchases

1. From the main navigation bar, select the Accounting menu.

2. Select the View Purchases menu option.

3. This section displays a quick overview of Purchases, Purchases in progress, Credit, and Remake. While not intended for accounting purposes, you may find this up-to-date information handy. The summary fields displayed are the following:
    - Purchases – Invoiced cases
    - Purchases in progress – Cases currently in production
    - Credit – Total credits issued
    - Remake – Total remakes

Cases

Submit Cases and track submitted cases as their status and

locations are progressively updated.

Submit a case

1. From the main navigation bar, select the Cases menu.
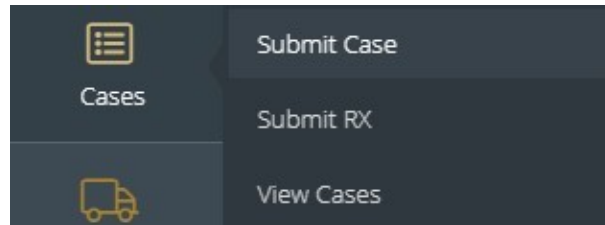
2. Select the Submit Case menu option

3. Once in the Submit Case page, you will have to first complete the following fields:

   • Submitting from a save case template

   • Case Type

   • Doctor Name

   • Patient Details

   • Case Details

   • Add Products to the case

   • Upload and attach documents, files, or images

4. If there are alternate shipping addresses on record with your account, there will be a Change option located directly underneath where the Shipping Address is listed. By clicking on this, you will be able to choose between the multiple locations.

Shipping Address

Dr Bob Jones
330 Rancheros Dr, Suite 258, San Marcos, CA, 92069

CHANGE

5. If the case should be marked as Rush, check the Rush option accordingly.

☐ RUSH
Extra charge may apply for Rush cases

6. If this submission should be saved as a template for future use, select the option Save
Template.

☐ SAVE TEMPLATE
Save this design as a template for future submissions

7. Once all case information is reviewed, select to authorize the case, and submit.

☐ THIS CASE IS AUTHORIZED AND SIGNED BY:
Doctor: Dr Bob Jones

Submit an Rx

1. From the main navigation bar, select the Cases menu.

2. Select the Submit RX menu option.

Case Information

1. Once in the Submit RX page, you will have to first complete the following fields:

   - Submitting from a save case template

   - Case Type

   - Doctor Name

   - Patient Details

   - Case Details

   - Add Products to the case

   - Upload and attach documents, files, or images

2. If there are alternate shipping addresses on record with your account, there will be a Change option located directly underneath where the Shipping Address is listed. By clicking on this, you will be able to choose between the multiple locations.

3. After you've entered the Case Information, proceed to add Products by selecting

PRODUCTS   ✚

Product Instructions

1. Once the Add product form is open, you will first need to select the RX Type:

   Rx Type:

   ℞ select rx type   ▼

2. Based on the RX Type selection, the product selection will display and the form will expand for selection of preferences and product instructions.

3. Thoroughly read all preferences & descriptions that populate and make the proper selections.

4. After you've finished with the adding product(s), preferences and instructions select Save.

5. If the case should be marked as Rush, check the Rush option accordingly.

   ☐ RUSH
   Extra charge may apply for Rush cases

6. If this submission should be saved as a template for future use, select the option Save Template.
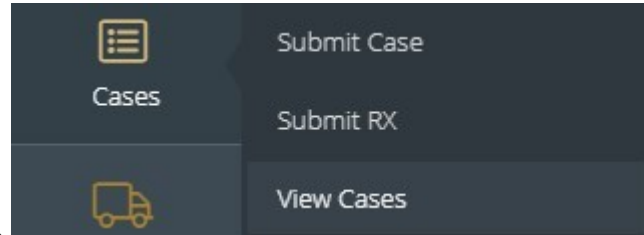
   ☐ SAVE TEMPLATE
   Save this design as a template for future submissions

7. Once all case information is reviewed, select to authorize the case, and submit.

   ☐ THIS CASE IS AUTHORIZED AND SIGNED BY:
   Doctor: Dr Bob Jones

View Cases

1. From the main navigation bar, select the Cases menu.

2. Select the View Cases menu option.

3. Once in the View Cases page, you can:

    •   Filter by Doctor or View all

    •   Sort cases by any of the available columns

    •   Drag and drop to rearrange the order of the columns

    •   Export the current list of cases

    •   View case details ☰

4. When selecting to view the case details you select from the following menu options:

    •   View Details   Upload Files

    •   View Attachments

    •   New Inquiry

    •   Make Comments

    •   Print Workorder

    •   Print Invoice

    Note: Menu options will depend on the display properties configuration in the portal.

***Please Note: The Delivery column will outline the latest activity on the case regarding delivery status. Please see below the key on the different values and what those values indicate:

- Fabricating: This means the has not been invoiced and the case is still in production
- Preparing to Ship: This means the case has been invoiced but it has not yet been shipped
- On its way: This means the case is invoiced and an outbound shipment or delivery is pending.
- Delivered: This means the case has been marked as successfully delivered.
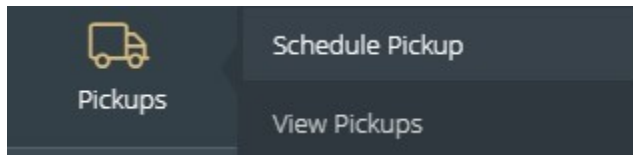
Pickups

Request a pickup and view existing scheduled or requested pickups.

Schedule Pickups

1. From the main navigation bar, select the Pickups menu. 2.
Select the Schedule Pickup menu option

3. This link will bring you to the Schedule Pickup page and you will need to complete the following:

   - Service Center
   - Service Type for Carrier shipping
   - Route for Local shipping
   - Pickup Date
   - Pickup Time From
   - Pickup Time To
   - Number of Packages
   - Total Weight
   - Comments

4. Once all information has been completed, select and you will receive an on-screen dialogue confirming the pickup request.

5. Depending on how the laboratory has provided access for carrier pickups, you will receive a confirmation dialogue that the pickup has been successfully requested or scheduled. If the pickup has been scheduled, the dialogue will display an option to Print the shipping label.

6. For pickups with tracking numbers, you can also click on the tracking to view its status on the carrier's website.

View Pickups

1. From the main navigation bar, select the Pickups menu.
2. Select the View Pickups menu option.
3. From View Pickups, you may view the following information for all listed pickups:

    •   Pickup ID

    •   Scheduled date

    •   Pickup Date

    •   Pickup time (From – To)

    •   Status

    •   Carrier

    •   Tracking Number

4. From this page, you may also request a new pickup as well as access the following actions on each listed pickup:

    •   Void   Pickup

                    •   View/Print Label

    •   Pickup   Notes

It is important to note, that your account's default shipping method will determine whether the pickup that is scheduled or requested will be either a Local Pickup request or a Carrier pickup.

Resources

My Files

1. From the main navigation bar, select the Resources menu.
2. Select the My Files menu option.
3. This page is designed for you to upload images and attachments for cases that are not yet sent to the lab or if the case number is not known. This page can also be used to upload any documents, contracts or forms that should be shared with the laboratory. For cases that have already been sent to the lab, please click View Cases and find the appropriate case to upload attachments.
4. With each upload, you may enter the following information:

   - Patient First Name

   - Patient Last Name

   - Document Date

   - Attachments Description

   - Department

   - Attachment Notes ## Public Files

1. From the main navigation bar, select the Resources menu.
2. Select the Public Files menu option.
3. This page is designed to access files, images, or documents that the laboratory has shared with you.

Preferences

Configure your alerts, notifications, add instructions to your account and set manufacturing preferences in one spot.
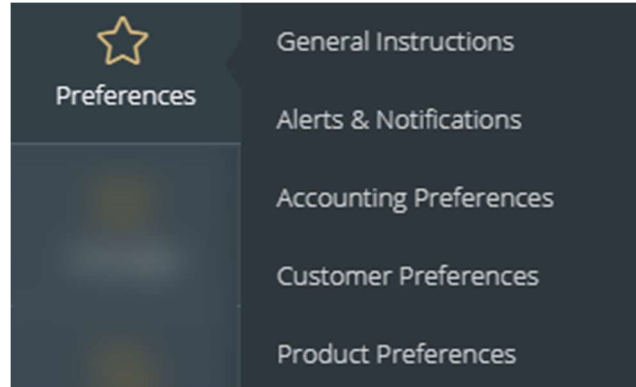
General Instructions

1. From the main navigation bar, select the Preferences menu.

2. Select the General Instructions menu option.

3. This page will display a free text box where you can enter any notes that should generate on every single case's work order form to be used in production in the laboratory.
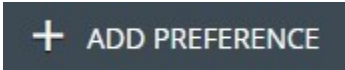
Alerts & Notifications

1. From the main navigation bar, select the Preferences menu.

2. Select the Alerts & Notifications menu option.

3. This area is designed to specify when and what types of alerts should occur.

4. There are two categories to activate: Alert Me of Changes as They Occur During the Day and Alert Me Once at The End of The Day. Each of these sections contain different options which will trigger an alert.

5. Once all of the desired alerts have been configured, it is important to complete the Notification Methods. The available notification methods include:

   • Email

   • Text Messages

Accounting Preferences
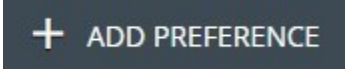
1. From the main navigation bar, select the Preferences menu.

2. Select the Accounting Preferences menu option.

3. This page allows you to configure the method in which you will receive your monthly billing statement.

4. It is important also to complete the Billing Contact Email with the correct recipient who should receive the statement.

Customer Preferences

1. From the main navigation bar, select the Preferences menu.

2. Select the Customer Preferences menu option.

3. This page is to define any general preferences that should generate automatically on every case's work order to be used in production in the laboratory.

4. In addition to adding preferences, you may view or modify any existing preferences already configured for all doctors or a specific practice doctor.

5. To add a preference, select **+ ADD PREFERENCE**

6. From this form, first you will need to select the Preference Type and then either select predefined values or enter a custom value. When all selections or text have been added, click Save.

Product Preferences

1. From the main navigation bar, select the Preferences menu.

2. Select the Product Preferences menu option.

3. This page is to define any product specific preferences that should generate automatically on every case's work order to be used in production in the laboratory.

4. In addition to adding preferences, you may view or modify any existing preferences already configured for all doctors or a specific practice doctor.

5. To add a preference, select **+ ADD PREFERENCE**

6. From this form, you will first need to select the product which you would like to add the preference for.

Product:

7. Once a product is selected you will then need to select a preference type. Based on the type that is selected, you will then select the predefined preference value or enter a custom preference value. When all selections or text have been added, click Save.
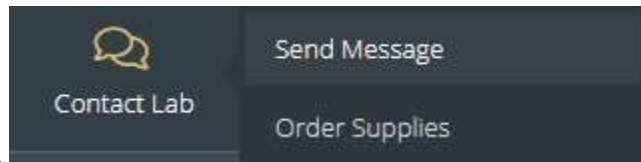
Messages

This area is designed to quickly view any messages and
attachments sent by your laboratory. You can also easily send any questions or
comments to your Lab.

View Message

1. From the main navigation bar, select the Messages menu
2. In the Messages page, you can view all correspondence that you have received from your laboratory.

Send Message

1. From the main navigation bar, select the Contact Lab menu

2. Select the Send Message menu option
3. Enter a Subject, briefly describing your inquiry.
4. Select the Department you would like this message directed to.
5. Enter a detailed description of your inquiry in the Message field.

Fulfillments

Order Supplies

1. From the main navigation bar, select the Fulfillments menu
2. Select the Order Supplies menu option.
3. Select the item type between the main option at the top of the page. The corresponding items will display accordingly and you may select as many items as desired.

 and you will

4. Once all items have been selected, click receive a confirmation that your request has been successfully processed.

Return Labels

1. From the main navigation bar, select the Fulfillments menu.
2. Select the Return Labels menu option.
3. If available for selection, select the appropriate Service Center.
4. If available for selection, select the service and package type as well as the number of labels.
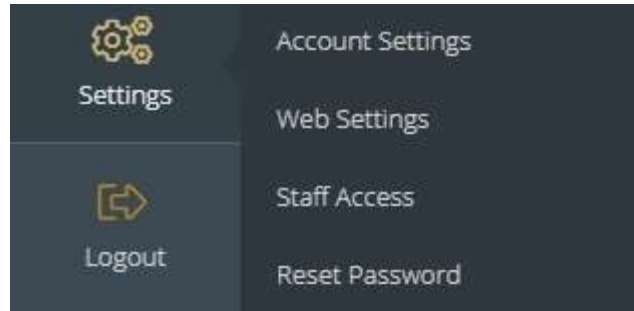5. If you intend to pay for the shipment for each return label, please check the option accordingly.

6. Once all information is selected, select .

Settings

Modify and Configure your account settings, web settings, staff access and reset password.

This includes Practice Name, Phone Numbers, Emails, Password and more.

Account Settings

1. From the main navigation bar, select the Settings menu

2. Select the Accounting Settings menu option

3. Configure the required fields as necessary.

    The fields that are currently editable are:

    - First Name

    - Last Name

    - Practice Name

    - License

    - Office Phone

    - Cell Phone

    - Fax

    - Email

    - Shipping Address

    - Billing Address

Web Settings

1. From the main navigation bar, select the Settings menu

2. Select the Web Settings menu option.

3. On this page, you may configure a language selection, reset certain modules back to default settings and access a link to add your portal link to the homepage of your device.
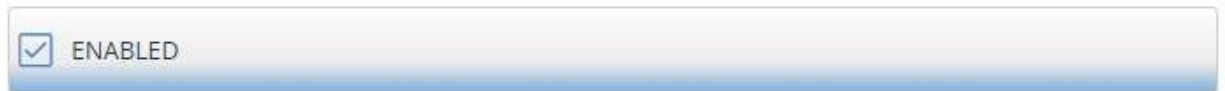
***Please note, if you are selecting a custom language it is important that you have accepted cookies on the portal website. If cookies are not accepted, the language will reset the next time the browser is closed and re-launched. ***

Staff Access

1. From the main navigation bar, select the Settings menu

2. Select the Staff Access menu option.

3. You may create staff records which the laboratory may access and also create user logins for any of those members of staff in order to grant them access to the portal.

4. To add a new staff login, select NEW STAFF

5. Complete the General information section.

6. To enable portal access, you will select the option for web access,

Web Access
☑ ENABLED

7. It is important to note the different levels of access that you may grant to staff users. There are three categories and all have different access throughout the portal.
   Basic has access to the following modules:
   - Cases
   - View Cases
   - Pickups
   - View Pickups
   - Messages
   - View Messages
   - Settings
   - Web Settings

- Standard has access to the following modules:
    - Accounting
        - View Statements
            - Cases
        - Submit Case
        - Submit RX
        - View Cases
            - Pickups
        - Schedule Pickup
        - View Pickups
            - Resources
            - My Files
        - Public Files
        - Preferences
    - General Instructions
    - Alerts & Notifications
    - Accounting Preferences
    - Product Preferences
        - Messages
        - View Messages
        - Contact Lab
        - Send Message
        - Order Supplies
            - Settings
        - Account Settings
    - Web Settings   Staff Access

- Full has access to the following modules:
    - Accounting
        - Make Payment
    - View Balances & Payments
        - View Statements
        - View Purchases
            - Cases
        - Submit Case
        - Submit RX
        - View Cases
            - Pickups

- Schedule Pickup
  - View Pickups
    - Resources
    - My Files
  - Public Files
  - Preferences
- General Instructions
- Alerts & Notifications
- Accounting Preferences
- Customer Preferences
- Product Preferences
  - Messages
  - View Messages
  - Contact Lab
  - Send Message
  - Order Supplies
    - Settings
  - Account Settings
  - Web Settings
  - Staff Access