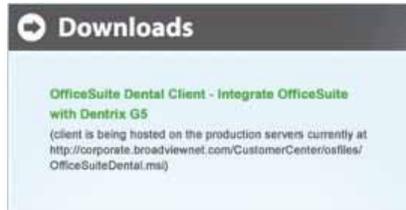# OfficeSuite Dental™
Install and Quick Start Guide

VISIT THE OFFICESUITE DENTAL™ PAGE:

Go to **www.broadviewnet.com/Download-OfficeSuite-Dental.** The software download is located in the **Downloads** section.

Click on the link and select **Run.** Follow the OfficeSuite Dental™ Wizard.

*Note: Users are prompted to select who is authorized to use the OfficeSuite Dental™ Client. It is recommended to select **Everyone** which allows any valid user logged into the target computer to see and use the OfficeSuite Dental™.*


To run OfficeSuite Dental™, click on the icon located on your desktop:

After the initial installation, you will need to perform a database activation. This allows Dentrix G5 and OfficeSuite® to connect to each other. The database activation will only need to be performed the first time you run OfficeSuite Dental™.

When you see the **Database Activation Required!** dialogue box, click **Update Now**.
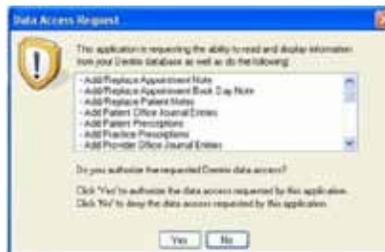

When you see the **Data Access Request** dialogue box, click **Yes**.

In order for the client to run, you will need to configure the settings. Click **Settings** on the top right side of the main screen.

The settings box will appear. The welcome letter you received will contain all of the information you need to enter. After you have filled in the settings, click **Save**. If all of the settings are correct, you will see the status show as **Connected**. If there is an issue, then you will see **Not Connected** displayed in red.
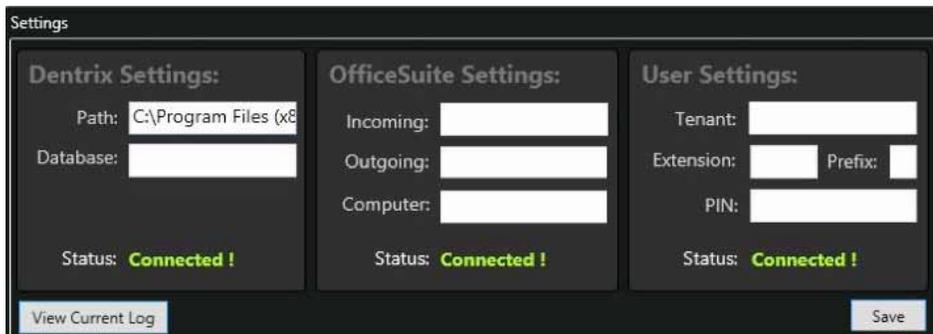
To exit the client, simply click the x located in the top right corner.

OFFICESUITE DENTAL™ LAYOUT

When an incoming call is received and the phone number is recognized by the Dentrix G5 database, OfficeSuite Dental™ will automatically pop on your screen. Here is a screenshot showing the various functions:

Patient Details will provide general information about the patient calling. The side buttons will allow you to view more specific information about the patient. All of this information is pulled directly from Dentrix G5 database.

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Here are screenshots of the various side buttons:

Family File

Ledger

Chart

TX Planner

Appointment Book

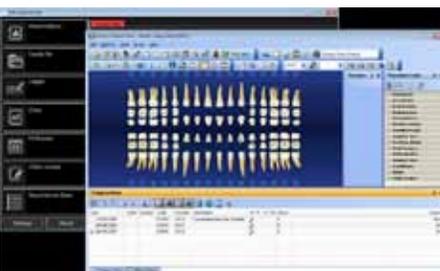...

OfficeSuite Dental™ will not allow you to make changes directly from the pop-up window. To make changes, click the appropriate side button and select **Open in Dentrix**. This will open that specific Dentrix module. For example, if you are viewing a patient's chart and select **Open in Dentrix**, Dentrix will open that patient's chart page (as shown).

You will then have the ability to make any changes to this patient's records. The next time the patient calls, you will see those changes reflected within OfficeSuite Dental™.

PATIENT SEARCH

Using the search bar located at the top of the OS Dental/Dentrix? client, you can perform an on-demand patient search. Begin typing the first letters of a patient's first or last name, or the first few digits of their phone number, and a list of matching records from Dentrix are instantly displayed. When you select the appropriate patient record, all of their information will automatically pop up just as it does when the patient calls into your office.

Type the patient's first or last name or phone number and click on the magnifying glass or hit enter.

The patient's record will appear in the client.

CALLING PATIENTS

To place a call directly from OfficeSuite Dental™, simply click on the number in the pop-up window. Your OfficeSuite® desk phone will ring and your call will be instantly connected when you pick up the receiver.

CREATING OFFICE JOURNAL ENTRIES

The notes you type into the Office Journal from OfficeSuite® are automatically saved in the Dentrix G5 database.

To create journal entries follow these steps:
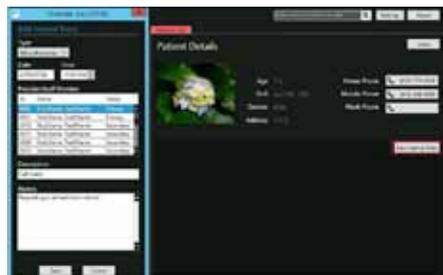
Click **New Journal Entry** from the Office Journal side button.

An **Add Journal Entry** pop-up window will appear. Fill out the necessary fields and click **Save**.

The OfficeSuite Dental™ Client application runs on any computer that meets the minimum requirements for Dentrix G5 and has Microsoft .NET Framework 4 installed with the latest available Windows Updates for Microsoft .NET Framework 4. Microsoft .NET Framework 4.0 (available from Microsoft at: *http://www.microsoft.com/en-us/download/details.aspx?id=17851)* The OfficeSuite Dental™ Client application runs on Windows XP and Windows 7.