

easydental[®]

easy to use. easy to own.

Publication Date

May 2015

Copyright

© 1987 – 2015 Henry Schein, Inc. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrievable system, or translated into any language in any form by any means without the written permission of Henry Schein, Inc.

Software License Notice

Your license agreement with Henry Schein, which is included with the product, specifies the permitted and prohibited uses of the product. Any unauthorized duplication or use of Easy Dental in whole or in part, in print, or in any other storage and retrieval system is forbidden.

Licenses and Trademarks

© 1987 – 2015 Henry Schein, Inc. Easy Dental, Henry Schein, and the “S” logo are registered trademarks of Henry Schein, Inc.

Easy Dental and Microsoft Word

Easy Dental can be used with Microsoft Word. To use Easy Dental with Microsoft Word, you need to license and install Microsoft Word.

Table of Contents

Introduction	2
Easy Dental Organization	2
Easy Dental Registration and Updates	5
Before Installing Easy Dental	5
How to Get Help	6
Tips for a Successful Installation.	7
Installing the Server Software	10
Installing the Client Software.	19
Starting Easy Dental	20
Registering/Activating Easy Dental	20
Register Now	22
Registering Online	24
Manually Entering the Registration Code.	25
Registering Later.	26

Introduction

Easy Dental is a practice management software product that can help you manage your dental practice. With Easy Dental, you can schedule appointments, record and track patient information, create treatment plans and prescriptions, manage patient accounts and billing, run reports, and more.

To make tasks simple, Easy Dental assigns all tasks to graphical toolbars. Each primary task has its own set of features that are accessed from the toolbar. This streamlined layout allows you to quickly locate and use each feature.

Thousands of dental practices worldwide have proven the Easy Dental software to be capable of turning a practice into a viable and profitable business. Easy Dental boosts staff productivity, enhances professionalism, helps keep chairs full, increases collections, and improves the bottom line.

This Installation Guide will help you install and register your Easy Dental software.

Easy Dental Organization

Easy Dental is organized into eleven different windows of information, or modules: Patients, Accounts, Treatment Plans, Chart, Prescriptions, Contacts, Schedule, Recall, Documents, Reports, and eDex.



Patients

The Patients module manages patients' demographic and insurance information. Patient information, such as patient's name, address, employer, insurance information, notes, and recall, are entered in this module.



Accounts

The Accounts module is used to manage patients' accounts. The Accounts module accurately details completed procedure costs, insurance claims, guarantor and insurance payments, and a running balance.



Treatment Plans

The Treatment Plans module is used to enter and track recommended procedures.



Chart

The Chart's complete chair-side integration makes it the perfect tool to simplify record-keeping. In the Chart, entering and documenting existing, recommended, and completed treatment is as simple as clicking a mouse. The Chart uses standard textbook charting symbols that are familiar and easy to use. This module also features the Estimator, a unique case presentation program that displays the treatment plan costs in terms of primary and secondary insurance portions and estimated patient's portion.



Prescriptions

The Prescriptions module is used to quickly create prescriptions and accurately track medicines prescribed to patients.



Contacts

The Contacts module acts as a contact manager for the office. All contacts and correspondence made with a patient can be recorded in this module.



Schedule

The Schedule module looks exactly like a paper schedule with the appointments blocked out in various colors, signifying different providers. With this module, appointments (including unscheduled appointments, recall appointments, and ASAP appointments) can be scheduled and tracked, significantly increasing production.



Recall

The Recall module allows you to effectively track and manage the recall system in your office. Recall will help you to stay on top of your patient retention with a series of lists and the ability to customize patient settings.



Documents

The Documents module allows you to attach electronic documents and images to patients, insurance carriers, providers, referrals, and employers.



Reports

The Reports module generates informative reports, performs practice analysis functions, and controls most printing processes. Easy Dental can be configured to your practice's unique needs in the Reports module.



eDex

The eDex module is an electronic contact manager and directory. You can use eDex to manage and quickly search lists of patients (active, inactive, or archived), employers, insurance carriers, labs, non-patients, providers, staff, referrals, and any other contact that you may want to remember. You can even use eDex to locate a patient's next appointment.

Easy Dental Registration and Updates

Registration/activation is required with Easy Dental. Registering/activating your software allows the Check for Updates feature to know which version of the software you are using to provide you with key software updates. Registration/activation also allows Easy Dental Customer Support Representatives to know which version of Easy Dental you are using in order to provide better service when answering your questions.

Easy Dental makes it easy to install updates on all the computers in your office. You can use the Check for Updates feature to check for updates online and automatically install them on any computer in your office.

Before Installing Easy Dental

Before installing and using Easy Dental, you should be familiar with using the computer. The Easy Dental documentation is written with the assumption that you are familiar with using a PC and Microsoft Windows.

Microsoft Windows must be installed before you can install Easy Dental. For information on supported Windows

versions, read the Easy Dental System Requirements included in the box with your software and available online at www.easydental.com. For information about installing and using Windows, refer to the Windows documentation.

How to Get Help

Henry Schein Practice Solutions recommends that dental offices contact Henry Schein TechCentral (800-288-7691) or another qualified integration specialist for new installation or upgrade assistance.

You can find answers to many questions about Easy Dental in the Easy Dental User's Guide, or in the Easy Dental Help (by clicking the Help button found in the toolbar or by pressing Alt+H).

If you are on a current Easy Dental Customer Service Plan, you can find additional information, including on-demand tutorials, at www.easydental.com/resourcecenter. You can also access the Easy Dental technical support knowledgebase for answers to common questions.

If these methods do not provide an answer, contact Easy Dental Customer Support at (800) 824-6375. Toll-free telephone support is available only to registered users on a current maintenance contract. Registered Easy Dental users not on a current support contract will be billed for telephone support at the current support rate. Support is limited to the current version of the software and one prior release. When calling customer support, be near the computer with the problem, and be prepared to give the following information:

- The Easy Dental customer number assigned to the practice
- Your name and the name of the practice

- The Easy Dental version number (found in the Help drop-down under About Schedule in the Schedule module)
- The type of network being used, if any
- The version of Windows installed on the computer and on the server
- The exact wording of any messages that have appeared on the screen
- The circumstances surrounding the question or problem
- Steps that have been taken in an effort to reach a solution

Tips for a Successful Installation

The following installation tips will help you minimize or eliminate any issues when installing Easy Dental. For a successful installation, read and follow the instructions below before attempting to install Easy Dental.

1. Meet the System Requirements

Make sure the server and workstations on your network meet the current system requirements before you upgrade to or install Easy Dental. The current Easy Dental System Requirements are included in the box with your Easy Dental software and are available online at www.easydental.com.

2. Back Up Your Data

Create a backup of the Easy Dental database and related files (or create a backup image of the server's entire hard drive, if you prefer). If you are upgrading, back up the server's EzDental directory and all sub-directories. If any Easy Dental data is stored elsewhere on the system, back up that directory as well. Verify the integrity of all backups to be sure you have a good backup before upgrading from a previous version of

Easy Dental. For more information, refer to the eBackUp for Easy Dental Recommendations document in the Easy Dental Resource Center at www.easydental.com/resourcecenter.

3. Check Available Disk Space

From the Start menu, click **Computer**. Right-click the C:\ drive icon and select **Properties**. The **Local Disk Properties** dialog box appears, and the **General** tab displays the used and free space on the computer. The current Easy Dental System Requirements are included in the box with your Easy Dental software and are available online at www.easydental.com.

Note: If you use imaging software and/or the Documents module, you must dedicate an additional 30-40 GB of hard drive space in addition to what is needed for the Easy Dental Server installation.

4. Prepare for Server and Workstation Installation

Find the Serial Number/Activation Code card inside the Easy Dental software box. These numbers will be needed during the installation. If you are upgrading, check the Batch Processor for reports. Print the reports and clear the Batch Processor. Send all unsent electronic claims.

Note: The Easy Dental upgrade process may clear any reports in the Batch Processor and delete any unsent electronic claims.

5. For Upgrades, Verify the Correct Version is Currently Installed

Easy Dental 2009 or newer must be installed before the program can be upgraded to Easy Dental 11.2 and 11.3. To determine which version of Easy Dental is installed, open Reports, then click **Help** and **About Reports**. If the version is older than Easy Dental

2009, all product upgrades must be installed to bring the version to Easy Dental 2009 or 2010. For example, if Easy Dental 2008 is currently installed, upgrade to Easy Dental 2009 or 2010 before installing Easy Dental 11.2 and 11.3.

6. For Upgrades, Verify the File Locations

If you are upgrading Easy Dental, locate the Easy Dental program, database, and template files. The locations of these files must be confirmed during the installation process. To view the file locations, open Reports, then click **Maintenance** and **Preferences**.

7. Exit Easy Dental at Each Workstation and Close Other Programs

Before installing Easy Dental, close any Easy Dental modules and any other programs on the Easy Dental server and all workstations. To avoid conflicts and allow access to all files and directories, you should disable any anti-virus and screen saver software and then re-enable it after you have completed the Easy Dental installation.

During server installation, it is best to shut down each workstation (to prevent others from starting Easy Dental while it is being updated).

8. Verify the Easy Dental CD Configuration

Verify that the Easy Dental Installation CD is the right CD for the office configuration (single user, multi-user, or lite multi-user).

9. Follow the Installation Instructions

Make sure you follow all the step-by-step instructions in this installation guide as you install Easy Dental.

10. Finish the Installation Completely

Do not interrupt the installation process, even if it appears as though nothing is happening. You will be prompted when the installation is ready to continue. Terminating an installation prior to completion could affect the integrity of the database. Terminate the installation only if you are directed to do so by Easy Dental Customer Support.

Installing the Server Software

If the program will be installed on a networked system, you'll need to install Easy Dental on the file server first.

To install the Easy Dental server software

1. Insert the Easy Dental CD-ROM into your CD-ROM drive. If your computer is equipped with AutoStart technology, the installation begins automatically.

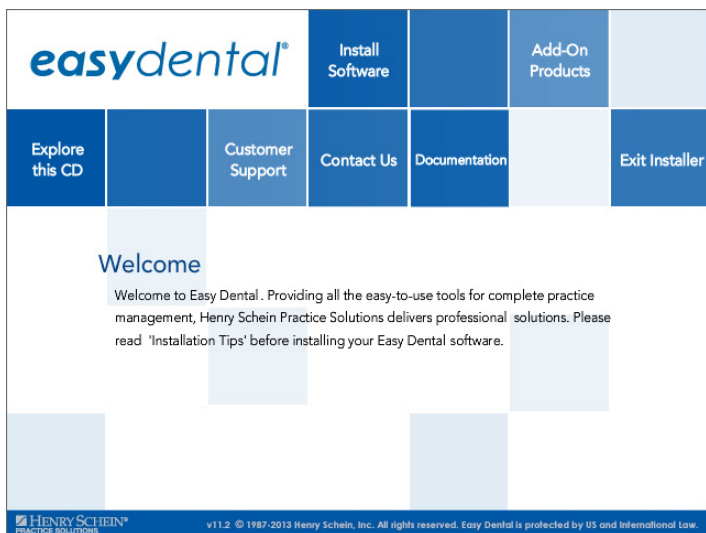
If the installation Welcome screen does not appear:

- A. Click **Start** and then click **Run**.

The **Run** dialog box appears.

- B. In the **Open** field, type D:\Launch.exe (where D: is the drive letter for the CD-ROM drive).
- C. Click **OK** to begin the installation.

After the installation program installs the needed prerequisites, the Easy Dental Welcome screen appears.



From the Welcome screen, you can click any of the following options:

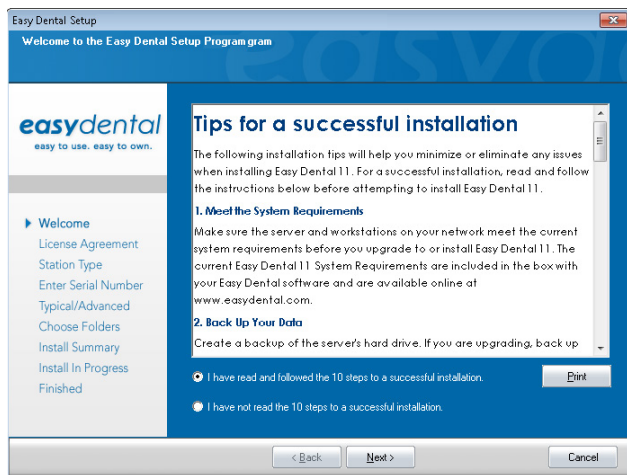
- **Install Software** - Lets you proceed with the Easy Dental software installation.
- **Add-On Products** - Provides information about several eServices add-on products and digital imaging software you can use with Easy Dental, as well as options for training and marketing your practice.
- **Explore this CD** - Opens a window where you can easily explore the contents of the Easy Dental installation CD.
- **Customer Support** - Provides Easy Dental Customer Support contact information, support and upgrade plans, frequently asked questions, and troubleshooting information.
- **Contact Us** - Displays contact information for Henry Schein Practice Solutions (address, phone numbers, and e-mail address).

- **Documentation** - Provides access to the Easy Dental documentation in PDF format.
- **Exit Installer** - Exits the Easy Dental installation program.

2. Click **Install Software**.
3. Click **Install Easy Dental**.
4. Click **Install Now**.

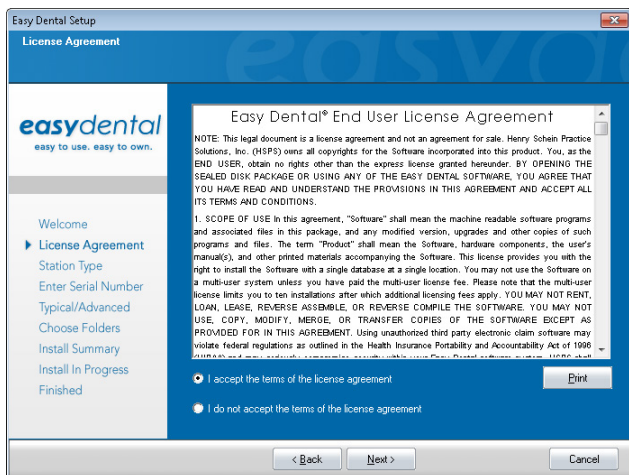
Easy Dental checks your system to verify that all required components, such as the Microsoft .NET Framework, are installed. If the Microsoft .NET Framework 3.5.1 and 4.0 are not already installed, Easy Dental installs them. This will take several minutes, and you must reboot your computer once these items are installed.

The Tips for a successful installation screen appears.



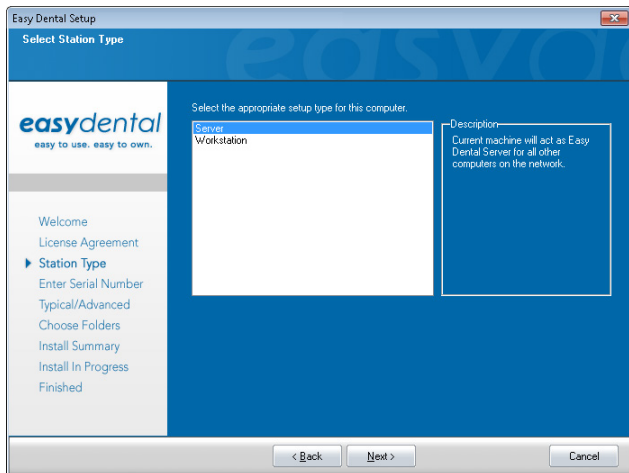
5. Read the Tips for a successful installation, select **I have read and followed the 10 steps to a successful installation**, and then click **Next**.

The License Agreement screen appears.



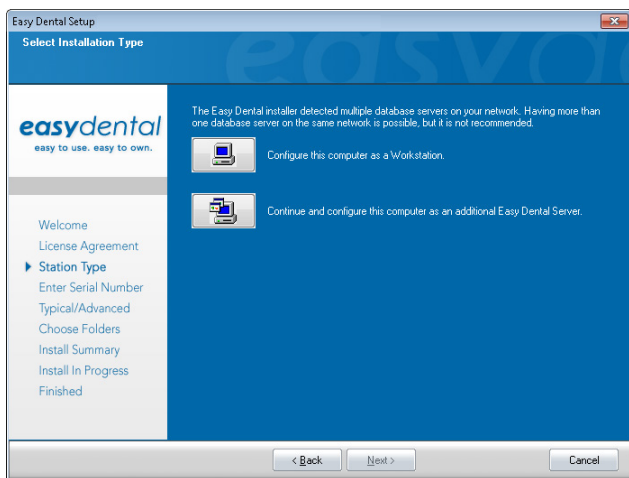
6. Read the Software License Agreement, select I accept the terms of the license agreement, and then click Next.

The Select Station Type screen appears.



7. Select the type of installation you are performing:
 - **Server** - Select this type of installation if you are installing on the computer that will act as the Easy Dental server for all other computers on the network.
 - **Workstation** - Select this type of installation if you are installing Easy Dental on a front office or clinical workstation over a network and have already run the server installation on another computer on the network.
8. Click **Next**.

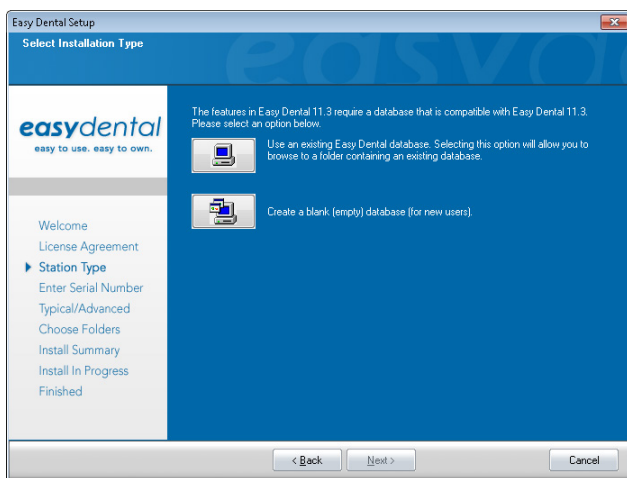
The installation program checks your network for any Easy Dental servers, and then the Select Installation Type screen appears.



9. Do one of the following:
 - Click **Configure this computer as a Workstation** if you have already installed an Easy Dental server and want this computer to function as a workstation.

- Click **Continue** and configure this computer as an **additional Easy Dental Server** if you want this computer to function as an Easy Dental server.

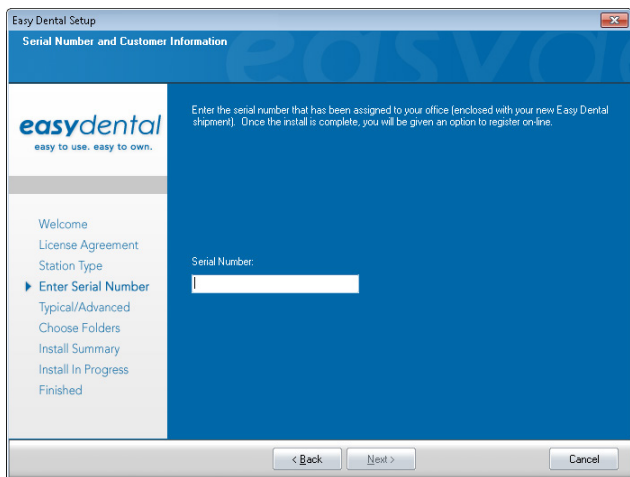
If the installation program detects any other Easy Dental servers on the network, the following Select Installation Type screen appears; otherwise, the Enter Serial Number screen appears, and you can skip to Step 11.



10. Click one of the following options:

- Use an existing Easy Dental database.
- Create a blank (empty) database (for new users).

The Enter Serial Number screen appears.



11. Enter the serial number that was provided with the software, and then click **Next**.

If you are upgrading, the serial number you entered previously to install Easy Dental appears. Verify that the serial number is correct by consulting the card included in the box with your Easy Dental software. You must enter the serial number assigned to your office in order for the registration/activation and Check for Updates features to work properly.

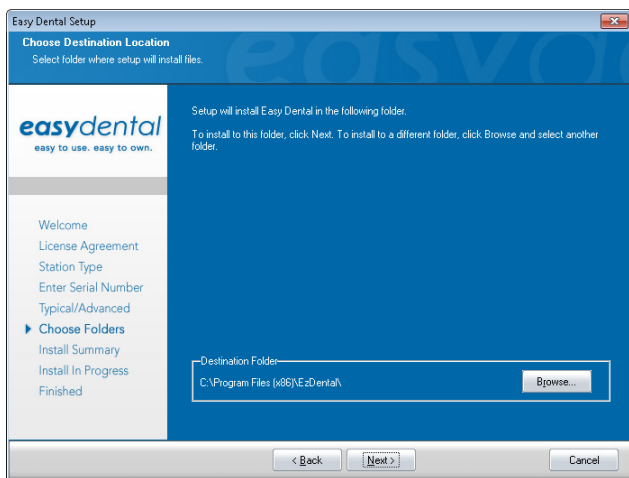
Note: If you are running Windows 7 or Windows Vista, and your data is located in the \Program Files or \Program Files(x86) folder, you will receive a message about data virtualization. Carefully follow the instructions in the message.

12. You can perform one of two installation types: **Typical** or **Advanced**. With a typical installation type (recommended for most computers), folders are placed in the default

locations, and all of the default Easy Dental features are installed. With the Advanced installation, you can specify the location of the Easy Dental files.

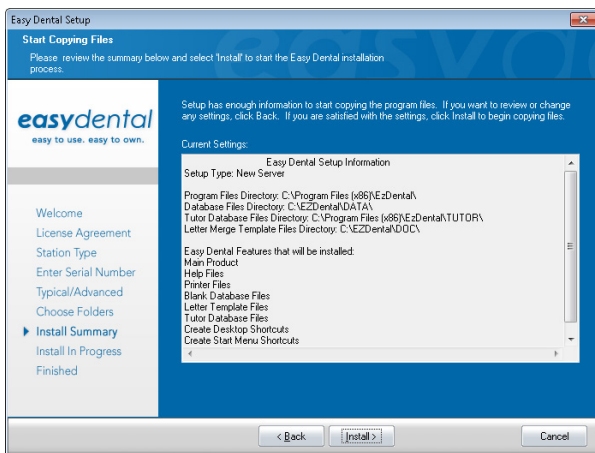
If you select Typical, proceed to Step 13.

If you select Advanced, the Choose Folders screen appears. Follow the sub-steps in the note below before proceeding to Step 13.

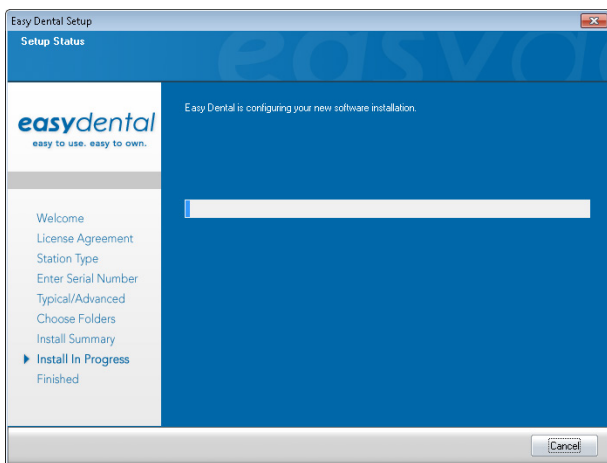


Note: The Choose Folders screen lists the destination directory for Easy Dental. By default, the recommended directory is selected for new users. The current location is selected for upgrading users. To use the default folder location, click **Next**. To change the folder location, click **Browse** and browse to the desired location. When the directory is set to the desired destination, click **Next** to continue.

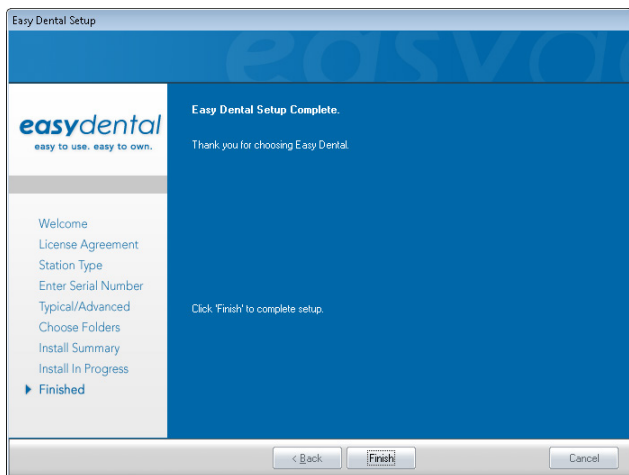
The Install Summary screen appears.



13. Review the settings that have been specified for your installation. To make changes to any of the settings, click **Back** and change the desired settings. When the settings are correct, click **Install** to begin installing Easy Dental.



When the installation is complete, the Finished screen appears.



14. Click **Finish** to complete the setup.

Note to integrators: For network installations, the C:\EZDental\Data folder on the server should be shared. The Easy Dental installation will add the following exception to the Windows firewall (any third-party firewall should be configured so that this port is open): UDP 6600.

Installing the Client Software

Note: The Easy Dental workstation installation no longer requires a mapped drive or that you use the Easy Dental CD. If you are upgrading from a previous version of Easy Dental, you can update your workstations automatically. For a new Easy Dental installation, you can install the client software by connecting to the directory via a UNC path or by using the Easy Dental CD.

Updating Workstations Automatically

1. Open Easy Dental on a computer that has not yet installed the required updates.

A message box appears notifying you that the computer needs to install updates.

2. Click **OK** to install the required updates.

Installing the Client Software on a New Computer

1. From the computer's Start menu, click Computer, and then click Network.
2. Select the Easy Dental server and navigate to Data\Installs\11.2.
3. Double-click the setup.exe file.

Starting Easy Dental

To start Easy Dental

1. From the Windows **Start** menu, point to **All Programs > Easy Dental**, and then click **Easy Dental**.

Note: The installation also places a shortcut to Easy Dental on your Desktop.

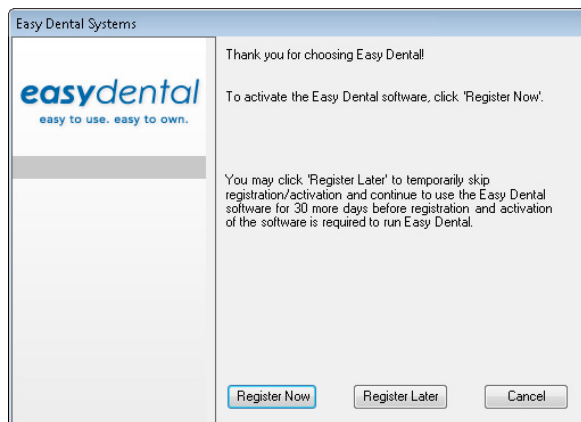
Registering/Activating Easy Dental

In order for Henry Schein Practice Solutions to be able to know which version of Easy Dental you are using to provide you with updates, you must register and activate Easy Dental. Registration is only necessary if you have not registered your previous version of Easy Dental.

In Easy Dental, registration and activation is required in order for you to run the software.

We recommend that you register and activate Easy Dental at the time of installation. If you do not register at the time of installation, you have a grace period of 30 days in which to register before registration/activation is required. After the 30-day grace period, you must register/activate Easy Dental in order to use your software.

If you do not restart your computer immediately after you complete the installation, the registration/activation dialog box appears. If you restart your computer immediately after you complete the installation, the activation screen appears when you open Easy Dental.



You can register/activate your software by clicking **Register Now**. You can temporarily skip the registration/activation process by clicking **Register Later**.

Note: You must complete the registration/activation within 30 days of installation. After 30 days, you will not be able to access your Easy Dental software until you complete the registration/activation.

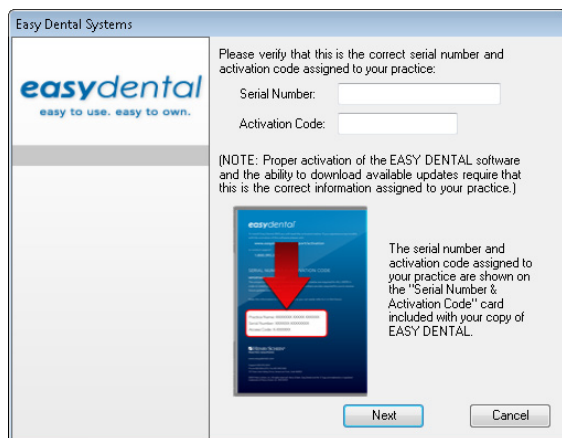
Register Now

You only need to register your software once, regardless of how many workstations you have.

To register your software

1. From any workstation, in the **registration/activation** dialog box, click **Register Now**.

The serial number and activation code verification dialog box appears.



2. The serial number you entered when you installed Easy Dental is displayed in the **Serial Number** field. Verify that the serial number listed matches the serial number assigned to your office.

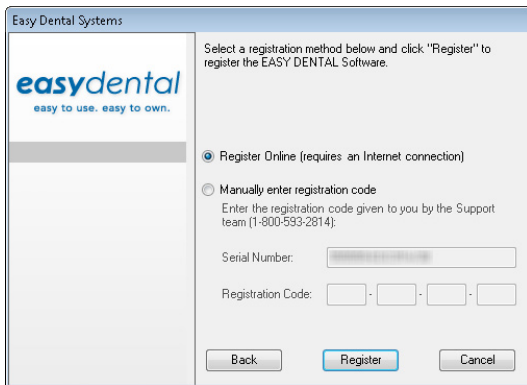
Note: You can find your serial number and activation code on the card located inside the flap of the outer shipping box in which you received your Easy Dental software.

3. In the **Activation Code** field, enter the activation code assigned to your practice.

Important: You must enter the correct serial number and activation code assigned to your practice. If you do not enter the correct serial number and activation code, you will not be able to activate the software properly or download the correct updates for your software.

4. Once you have entered the correct serial number and activation code assigned to your practice, click **Next** to proceed with the registration process.

The select registration method screen appears.



5. You have two registration options: register online or manually enter a registration code. Select the desired option and follow the directions below to register/activate your software.

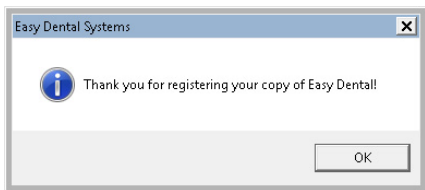
Note: Registering online requires an Internet connection. If you do not have an Internet connection, you must call Easy Dental Customer Support and manually enter the registration code.

Registering Online

To register/activate your Easy Dental software online

1. Click Register.

The registration utility will verify your serial number and automatically register/activate your software. A message appears when the activation has been completed successfully.



2. Click **OK** to close the message box and open Easy Dental.

Manually Entering the Registration Code

To register and activate your Easy Dental software manually

1. You must call Easy Dental Customer Support at 1-800-824-6375 to obtain your complete registration code. When you call customer support, you must have your full serial number available, which is located on the back of the CD case.
2. Easy Dental Customer Support will provide you with a 16-digit registration code. Enter your registration code (obtained by calling Easy Dental Customer Support) in the fields provided (four digits in each field).

Note: The activation code found on your Serial Number & Activation Code Card is for online registrations only and is not the registration code you should enter here.

3. Click **Register**.

A message appears when the activation has been completed successfully.

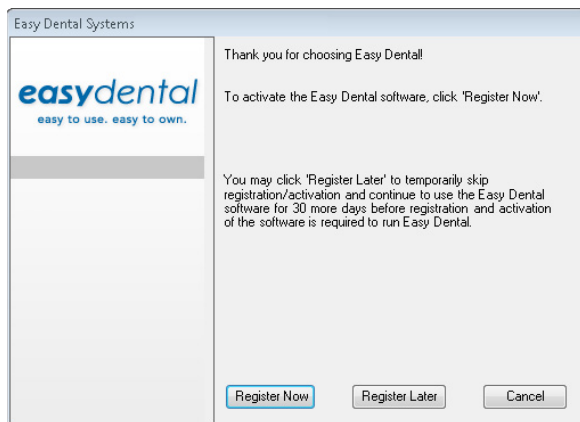
4. Click **OK** to close the message box and open the module you were trying to access.

Registering Later

If you click Register Later on the registration/activation dialog box, the registration/activation dialog box is closed and the module you were trying to access opens.

Until you register Easy Dental, the registration/activation dialog box appears once a day and reminds you how many days you have left until you must register/activate Easy Dental.

Since registration/activation is required, you can only click Register Later for 30 days after you install Easy Dental. After 30 days, the Register Later button is disabled on the registration/activation dialog box. At that point, you must register Easy Dental before you can access the program.



Follow the steps in the Register Now section above to register/activate your software so you can use it.



www.easydental.com

Support 800.593.2814 | Phone 800.824.6375

1220 South 630 East, Suite 100, American Fork, Utah 84003

©2015 Henry Schein, Inc. All rights reserved. Henry Schein, Easy Dental and the 'S' logo are trademarks or registered trademarks of Henry Schein, Inc. 209-7413