

easydental[®]
 2010

easy to use. easy to own.

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Easy Dental and Microsoft Word

Easy Dental can share its database with Word for Windows, a word processing product created by Microsoft Corporation. To use Easy Dental with Word for Windows, you need to license and install Microsoft Word for Windows.

Introduction

Easy Dental is an easy-to-use practice management software product that can help you manage every aspect of 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 instead of using a menu bar. 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.

Easy Dental provides a customer support team to answer questions and resolve concerns. Our support technicians receive regular training to keep current with the latest product information and technologies.

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, increases collections, helps keep chairs full, and improves the bottom line. From front desk to operator, to x-ray, Easy Dental provides profitable integration solutions.

Easy Dental Organization

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



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. Patients are organized by family, and a patient's position within a family can be viewed 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. This module 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.



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.



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 correspondence and contacts 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.

Easy Dental 2010 Registration and Updates

Registration/activation is required with Easy Dental 2010. 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 2010 makes it easy to install updates on all the computers in your office. You can use the Updates feature to check for updates online and automatically install them on any computer in your office.

What You Should Know First

Before installing Easy Dental 2010, you should be familiar with basic computer usage, including running Microsoft Windows. Microsoft Windows XP Professional or higher must be installed before Easy Dental 2010 can be installed. For information on installing and using Windows, refer to your Microsoft Windows documentation.

It is essential to understand the fundamentals of using Windows in order to use the Easy Dental software. This documentation is written with the assumption that users know how to use a mouse, and how to open a Windows menu and select options. Consult the Microsoft Windows documentation to learn more about these actions.

How to Get Help

Most questions regarding Easy Dental 2010 can be answered by referring to the Easy Dental Help (by clicking the Help button found in the toolbar or by pressing Alt + H).

The Easy Dental Resource Center offers an online library of on-demand software tutorials and product manuals, and a technical support knowledgebase. Access is free for dental practices on an Easy Dental Customer Service Plan. Log in today at www.easydental.com/resourcecenter.

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

Note: The Easy Dental Customer Support staff has extensive experience in supporting the Easy Dental 2010 software and, as software support, they are not authorized to answer questions or solve problems relating to hardware, network, operating system, or computer configurations. Hardware, network, and operating environments vary from office to office; therefore, questions regarding these topics should be addressed by a hardware and/or operating system support representative from the appropriate vendor. Operating system questions can generally be answered by reading the Windows documentation.

Easy Dental User's Guide

The Easy Dental User's Guide is available in PDF format on the Easy Dental CD and is also installed with the Easy Dental software. It is also available online at www.easydental.com and in the Easy Dental Resource Center at www.easydental.com/resourcecenter.

You can order a printed copy of the Easy Dental User's Guide by going to www.easydental.com/support/documentation.aspx

Installing Easy Dental

Use this installation guide to install Easy Dental. Follow each step of the installation carefully so as to ensure a successful installation. Read the System Requirements, Before Installing, and the Tips for a Successful Installation sections before you begin your installation.

System Requirements

Due to the new features and technology included in Easy Dental 2010, it is very important to ensure that your system meets the latest system requirements. System requirements are subject to change according to current computer industry standards. For the latest system requirements, visit www.easydental.com or call **1-800-824-6375**. Review the system requirements before installing Easy Dental 2010 to ensure a successful installation or upgrade of the software.

Before Installing

The information contained in the following sections is vital to a smooth installation of Easy Dental 2010. Read this section carefully before beginning the installation. If Easy Dental 2010 is being installed on a network, the installation process must be completed on each workstation. Install Easy Dental 2010 on the file server (the system where the data files will be stored) first.

Note: If your network has a dedicated file server (a system with a Windows operating system installed), you should not install Easy Dental on it. Instead, install Easy Dental on the first workstation as if it is the file server. Be sure to direct paths for the Data Files and Letter Templates to the dedicated server's hard drive. For help setting up a dedicated server network, please contact Henry Schein TechCentral (800-288-7691) or a qualified network technician.

Tips for a Successful Installation

The following installation tips will help you minimize or eliminate any issues when installing Easy Dental 2010. For a successful installation, please read and follow the steps and instructions below before attempting to install Easy Dental 2010.

Note: Easy Image 4.0 is not compatible with Easy Dental 2010. Easy Image 4.5 or higher must be installed before installing Easy Dental 2010.

1. Ensure Your System Meets the System Requirements

Ensure the system meets the overall system requirements for Easy Dental 2010 before installing or upgrading. (You can obtain the most up-to-date copy of the Easy Dental 2010 System Requirements at <http://www.easydental.com/support/documentation.aspx>.) Please read the system requirements for Easy Dental 2010 and verify that each computer meets all of the requirements before you install or upgrade the Easy Dental software. Some versions of Microsoft Windows are no longer supported with Easy Dental 2010.

Adequate processor speed and network configuration is important to help reduce or eliminate any latency/performance issues as they relate to Easy Dental 2010. The amount of free memory on any computer can greatly impact the performance of the computer and also the performance of the overall Easy Dental software. Reducing or eliminating the number of unnecessary processes on a computer can significantly improve a computer's performance.

By carefully reading and adhering to the Easy Dental 2010 System Requirements, you can increase the likelihood of a successful installation. It is also recommended that dental offices contact Henry Schein TechCentral (800-288-7691) or other qualified integration specialists who offer help with installation and ongoing service and support.

2. Back Up Your Data

A backup should be created of the entire server hard drive. If upgrading, at a minimum, 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. Contact Henry Schein TechCentral (800-288-7691) or the support organization for your backup software before upgrading to Easy Dental 2010. It is very important to have a valid, verified backup when you are upgrading from a previous version of Easy Dental.

For worry-free data security, try eBackUp for Easy Dental. Call 1-800-824-6375 for details.

3. Check Available Disk Space

From the Start menu, click Computer (or My Computer on some systems). Right-click the C:\ drive icon. Select Properties. Click the General tab to display the used and free space on the computer. For a workstation install, the free space on disk should be over 3 GB. For a server installation, the free space available on disk should be at least 40 GB. Although the actual Easy Dental 2010 program requires approximately 1 GB of free hard disk space, it is recommended that at least 3 GB be free at all times for the Windows operating system.

Note: Using Easy Image and/or using the Documents module requires dedicating additional hard drive space (30 – 40 GB more than the 40 GB of free space needed for the Easy Dental 2010 Server installation) to adequately provide storage for current and future patient images and documents. Evaluate the computer's available disk space and plan appropriately.

4. Prepare for Server and Workstation Installation

Follow these four steps to prepare for the installation:

Find the serial number. This number may be needed during the install.

If you are upgrading Easy Dental, check the Batch Processor for reports. Print the reports and clear the Batch Processor. Send all unsent eClaims.

If you are upgrading Easy Dental, close Easy Dental on each workstation before starting the server install. It is best to shut down each workstation.

The server installation must be completed before the workstations can be installed.

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

Easy Dental 2008 or 2009 must be installed before the program can be upgraded to Easy Dental 2010. 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 2008, all product upgrades must be installed to bring the version to Easy Dental 2008 or 2009. For example, if Easy Dental 2007 is currently installed, upgrade to Easy Dental 2008 or 2009 before installing Easy Dental 2010.

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. IMPORTANT! Close All Programs that are Running

Look at the Windows notification area (or System Tray, normally in the bottom-right corner of the screen) and close any unnecessary programs that appear there, including the Easy Dental Time Clock. After the programs have been closed, disable the Windows screen saver. To disable the Windows screen saver, click Start, then point to Control Panel, and click Display. Click the Screen Saver tab, and in the Screen Saver list select [None].

Note: After Easy Dental 2010 has been installed, enable the screen saver by following the same steps, but select a screen saver instead of selecting [None].

8. Verify the Easy Dental 2010 CD Configuration

Verify that the Easy Dental 2010 Installation CD is the right CD for the office configuration (single user, multi-user, or office multi-user).

9. Begin the Installation

Begin the installation by following the step-by-step instructions in this document.

10. Finish the Installation Completely

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

Need help? Contact Easy Dental Customer Support by sending an e-mail message to support@easydental.com or by calling (800) 824-6375.

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 Easy Dental server software

1. Insert the Easy Dental 2010 CD-ROM into your CD-ROM drive. If your computer is equipped with AutoStart technology, the install startup screen appears within a few seconds. If the installation does not begin, complete steps 2 and 3. Otherwise, proceed to step 4.

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

The Run dialog box appears.

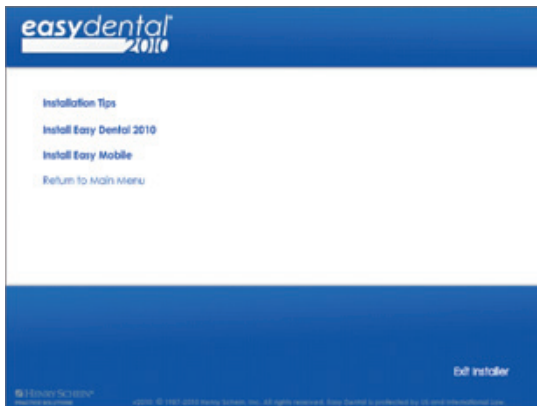
- Type D:\Launch.exe in the command line (where D: is the drive letter for the CD-ROM drive), then click **OK**.

The Easy Dental 2010 splash screen appears.



- Click **Install Software**.

The Easy Dental 2010 installation screen appears.



- Click **Install Easy Dental 2010**.

A description of the Easy Dental 2010 installation appears.



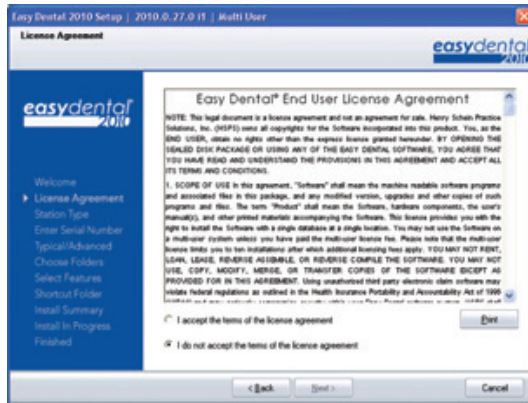
- Click **Install Now**.

The Installation Setup screen appears, followed by the Welcome screen.



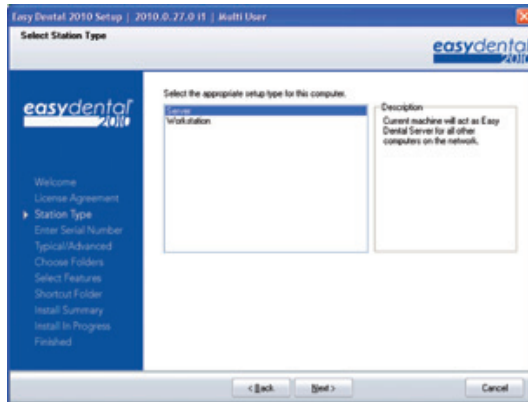
7. Read the Tips for a Successful Installation, then select **I have read and followed the 10 steps to a successful installation** and click **Next**.

The License Agreement screen appears.



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

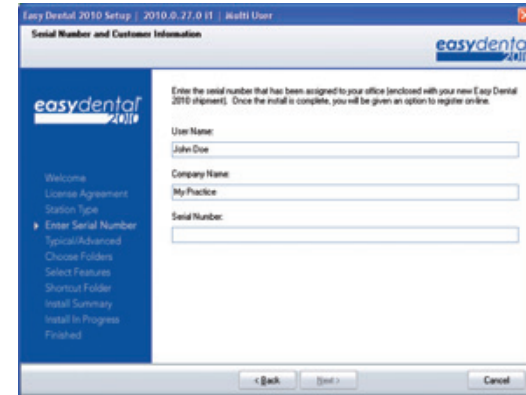
The Station Type screen appears.



Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms of the license agreement** and click **Cancel** to terminate the installation.

9. Select the setup type (**Server** or **Workstation**) and click **Next**.

The Enter Serial Number screen appears.



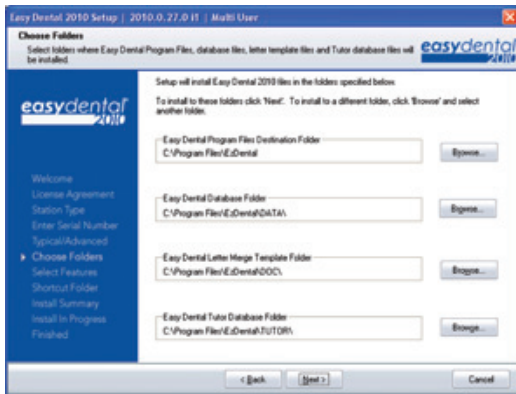
10. Enter your name, the name of the company, and the serial number that was provided with the software, then click **Next**.

The Select Installation Type screen appears.



11. You can perform one of two installation types: **Typical** or **Advanced**. The Typical installation type is recommended for most computers. During the Typical install, the directories will point to the default locations and all of the default features of Easy Dental will be installed. In the Advanced install, you can customize the locations of the directories and select which components of Easy Dental to install. If you select Typical, proceed to Step 12.

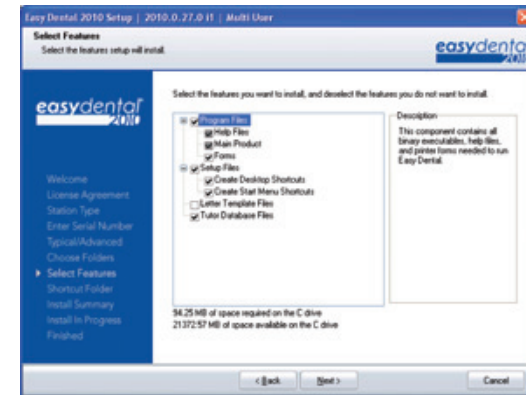
If you select Advanced, the Choose Folders screen appears. Follow the following sub-steps before proceeding to Step 12.



- a. The Choose Folders screen lists the destination directories for the Easy Dental 2010 components. By default, the recommended directory is selected for new users. The current location is selected for upgrading users. To change the directory, click **Browse**.

If you want to use the default folder locations, click **Next**. If you want to change the folder locations, click **Browse** and browse to the desired location. When each directory is set to the desired destination, click **Next** to continue.

The Select Features screen appears.



- b. The Select Features screen lists all available features. By default, all features are selected for new users.

Note: The list of features and sub-features changes according to which component is selected.

- **Blank Data Files** - Select this option if this is a new installation.

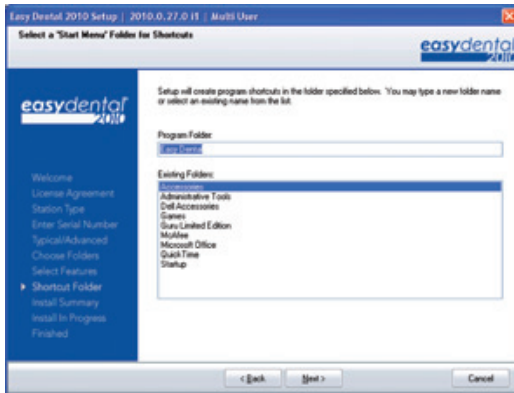
Warning: Do NOT select this option if you have previously entered information in Easy Dental. Selecting this option when upgrading will cause any existing patient information to be overwritten and lost!

- **Tutor Data Files** - These files are helpful tutorial files used to assist in learning Easy Dental basics. Networked users should install the tutorial files on each workstation. It is recommended that existing users install a new tutorial database to replace the existing Easy Dental tutorial database.
- **Program Files** - Installs basic program files. This option must be selected in order for Easy Dental to run after the installation.
- **Setup Files** - Installs the setup files necessary to install Easy Dental at a later time if needed. These files should be selected during server installation for both new and upgrading users.
- **Letter Files** - Installs blank letter templates. New users should select this option. Upgrading users should not select this option.

Warning: Selecting this option will cause existing Easy Dental letters to be overwritten. Customizations made to letter data will be lost if Letter Files is selected.

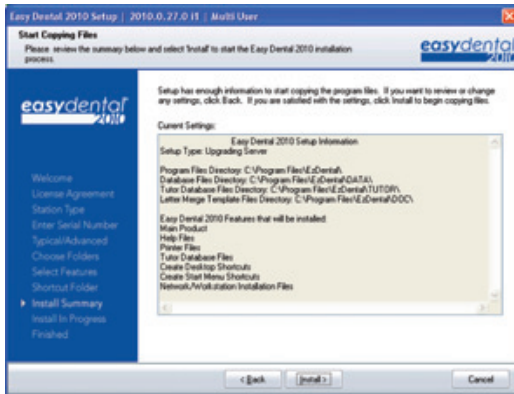
- c. Once all of the correct components have been selected, click **Next** to continue.

The Shortcut Folder screen appears.

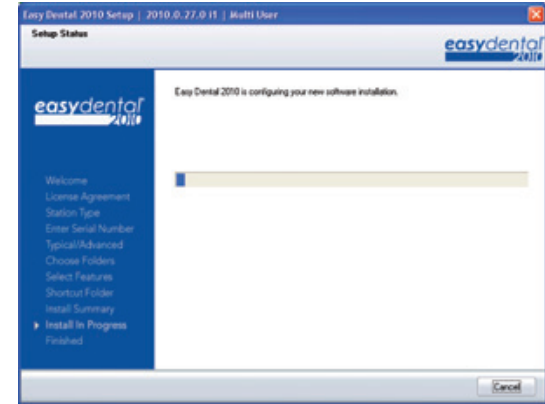


- d. The Shortcut Folder is the folder where the Easy Dental start menu shortcuts will be located. By default, the Program Folder is called Easy Dental. The Program Folder name can be customized by entering the desired name or selecting one from the list. Click **Next** to continue.

The Install Summary screen appears.



12. When you have selected the features to install (either by using the Typical or Advanced install), review the settings that have been specified for your installation. If you want 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.



13. Select **Register Easy Dental On-Line** and click **Finish** to complete the setup.

Installing the Client Software

To install Easy Dental client software

1. Map a network drive to the EzDental directory on the file server. If you do not know how to map a network drive, contact your system administrator or your network software technical support.
2. From the workstation, bring up the network drive that was mapped to the server's EzDental folder. Within the Data folder, open the Installs folder, then the 2010 subdirectory. Double-click the setup.exe file.

The Easy Dental install program will start and the Welcome screen appears.

Note: The Easy Dental workstation installation requires a mapped drive. Problems can occur if you run the installation by connecting to the directory via a UNC path instead of mapping a drive.

3. Follow the installation steps in the previous section of this guide.

Note: The Data Files and Letter Templates options are not available for a workstation install.

Starting Easy Dental

To start Easy Dental

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

The Easy Dental Start Up screen appears, after which Easy Dental opens.

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

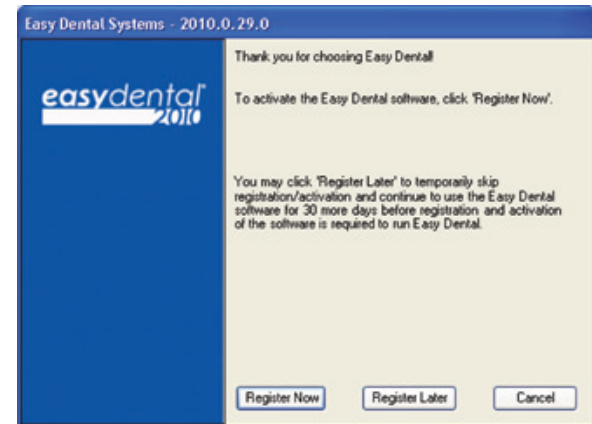
Registering/Activating Easy Dental

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 2010.

In Easy Dental 2010, registration and activation is required in order for you to run the software.

It is recommended 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 2010 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 dialog box appears when you open Easy Dental module.



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.

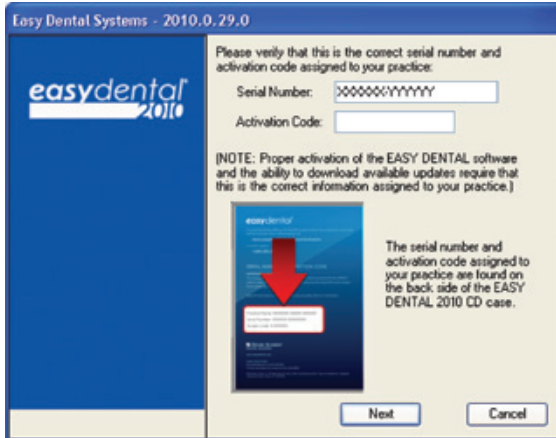
Register Now

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 2010 is displayed in the **Serial Number** field. Verify that the serial number listed matches the serial number assigned to your office.

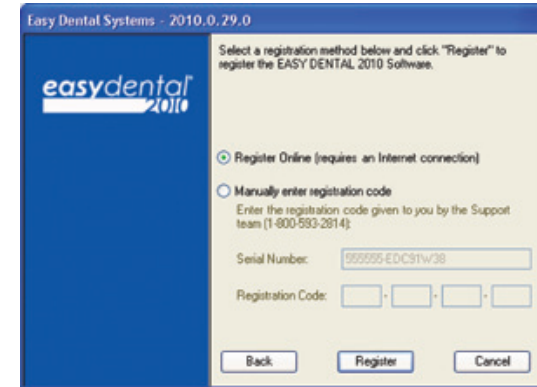
Note: You can find your serial number and activation code on the card located inside the flap of the outer shipping box in which you received your Easy Dental 2010 software.

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 dialog box 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.

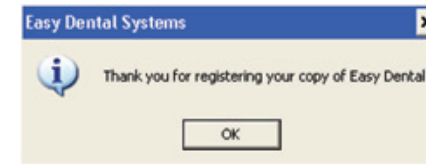
Note: Registering online requires an Internet connection. If you do not have an Internet connection, you must call Easy Dental Customer Support and manually enter the registration code.

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).

Important: 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.

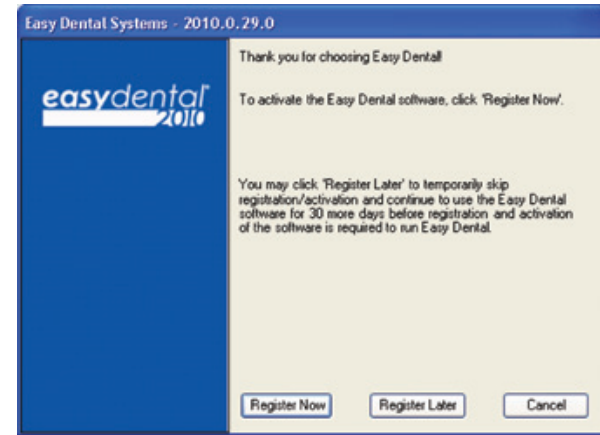
4. Click **OK** to close the message box and open the module you were trying to access.

Registering Later

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

Until you register Easy Dental 2010, the registration/activation dialog appears once a day and reminds you how many days you have left until you must register/activate Easy Dental 2010.

Since registration/activation is required, you can only click Register Later for 30 days after you install Easy Dental 2010. After 30 days, the Register Later button is disabled on the registration/activation dialog. At that point, you must register Easy Dental 2010 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

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