easydental®

Easy Dental 12.2

Installation Guide

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EASY DENTAL AND MICROSOFT WORD FOR WINDOWS

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.

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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.

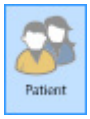
To make tasks simple, all tasks in Easy Dental are assigned to graphical toolbars. Each primary task has its own set of features that are accessed from the toolbar. This streamlined layout allows you to quickly locate and use each feature.

Thousands of dental practices worldwide have proven the Easy Dental software to be capable of turning a practice into a viable and profitable business. Using Easy Dental, you can boost staff productivity, enhance professionalism, keep chairs full, increase collections, and improve your bottom line.

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

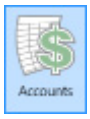
Easy Dental Organization

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



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

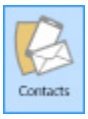
The Treatment Plans module is used to enter and track recommended procedures.

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.

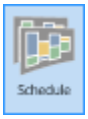
Prescriptions

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



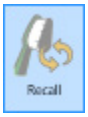
Contacts

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.

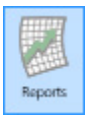


Recall

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 12.2 Registration and Updates

Registration/activation is required with Easy Dental 12.2. 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 12.2 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 12.2 System Requirements available online at www.easydental.com/support/software-updates. For information about installing and using Windows, refer to the Windows documentation.

How to Get Help

If you have questions concerning hardware or network requirements, Henry Schein One recommends that you contact Henry Schein One TechCentral (800-288-7691) or another qualified integration specialist.

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 Service Bundle, 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 12.2. For a successful installation, read and follow the instructions below before attempting to install Easy Dental 12.2.

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 12.2. The current Easy Dental 12.2 System Requirements are available online at www.easydental.com/support/software-updates.

Back Up Your Data

Create a backup of the server's hard drive. 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.

Check Available Disk Space

From the Start menu, click **My 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 available online at www.easydental.com/support/software-updates.

Important: If you use imaging software and/or the Documents module, you must dedicate an additional 30-40 GB of hard disk space in addition to what is needed for the Easy Dental 12.2 Server installation.

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.

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

For Upgrades, Verify the Correct Version is Currently Installed

You must install Easy Dental 12 or 12.1 before you can upgrade to Easy Dental 12.2. To determine which version of Easy Dental is installed, in the Patient Banner, click the Help button, and then click **About**. If the version is older than Easy Dental 11.4, you must install all product upgrades to bring the version to Easy Dental 11.4. For example, if Easy Dental 11 is currently installed, upgrade to Easy Dental 11. 2 or 11.3 and then to 11.4. From Easy Dental 11.4, you can install Easy Dental 12.1. You can then upgrade to Easy Dental 12.2 through the Update Manager.

Note: For more information on installing Easy Dental server software updates, see "Installing Easy Dental server software updates" in the Easy Dental Help.

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).

Follow the Installation Instructions

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

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

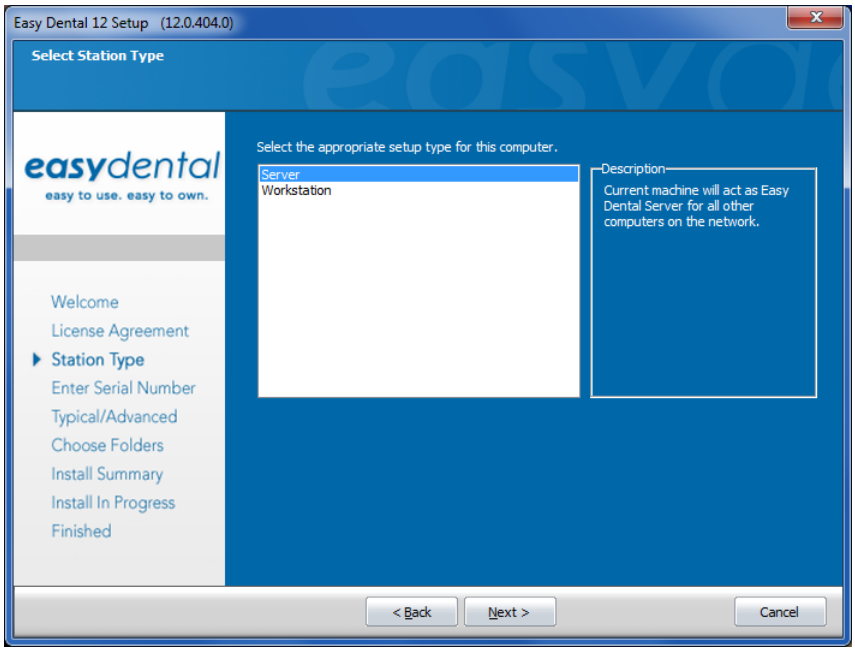
1. Double-click setup.exe.

   Your system is checked 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 License Agreement screen appears.

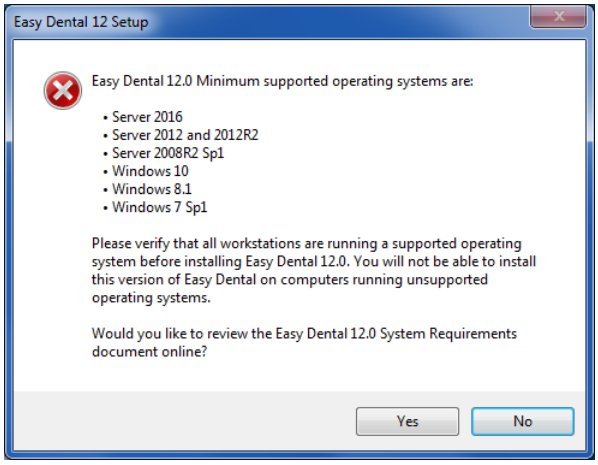
2. Read the Software License Agreement, select **I accept the terms of the license agreement**, and then click **Next**.

   The Select Station Type screen appears.



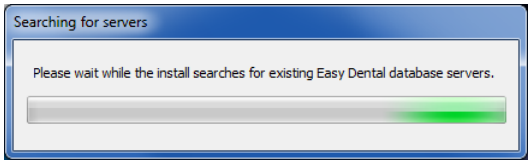
3. Select the type of installation you are performing:
   - **Server** – Select if you are installing on the computer that will act as the Easy Dental server for all other computers on the network.
   - **Workstation** – Select if you are installing Easy Dental on a front office or clinical workstation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

   The Minimum Supported Operating Systems dialog box appears.

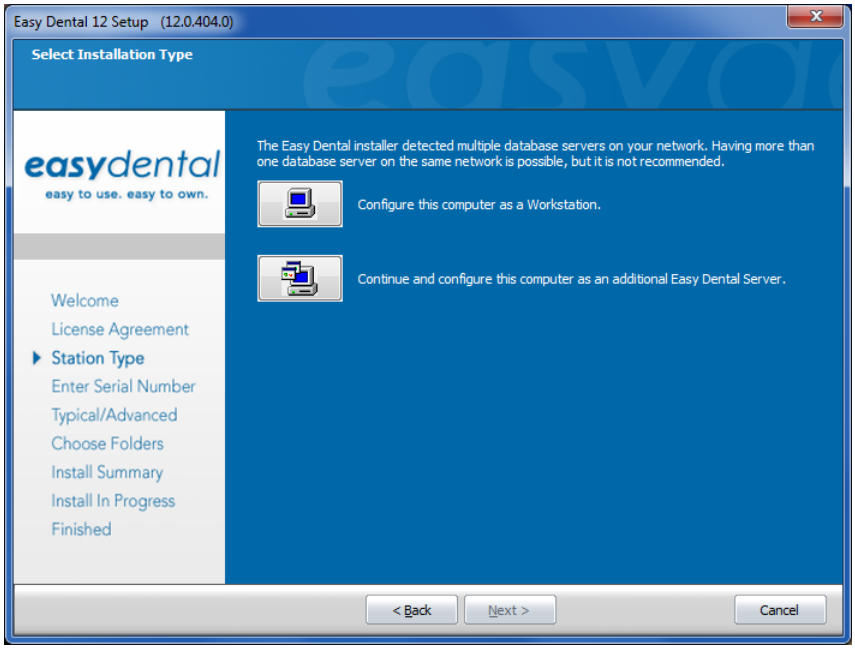


5. To review the Systems Requirements document online, click **Yes**; otherwise, click **No** to continue the installation.

   The Searching for servers screen appears.

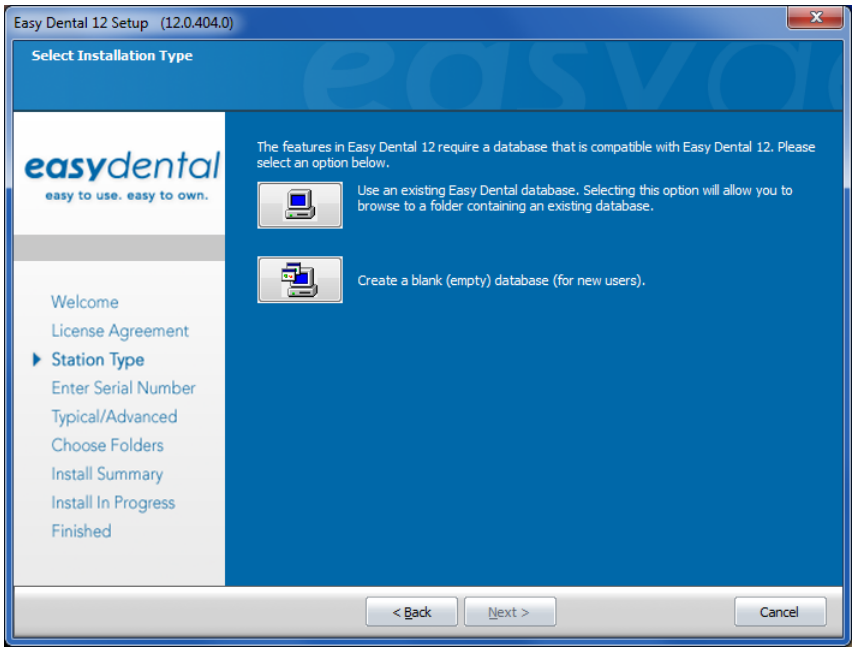


If the installation program detects any other Easy Dental servers on the network, the following Select Installation Type screen appears; otherwise, skip to Step 8.



6. Click one of the following options:
   - **Configure this computer as a Workstation**.
   - **Continue and configure this computer as an additional Easy Dental Server**.

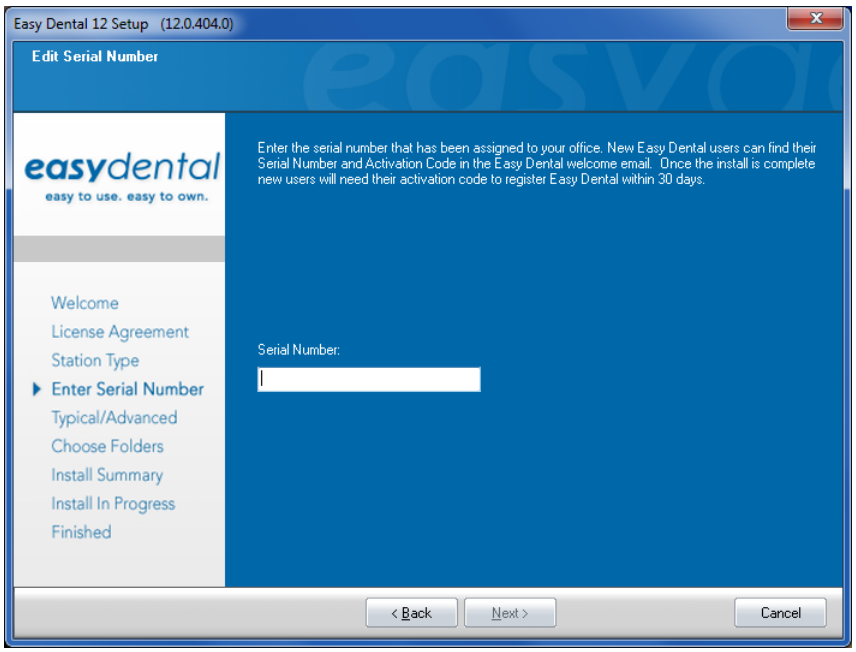
   The following Select Installation Type screen appears.



7. Click one of the following options:

- **Use an existing Easy Dental database.** You can then browse to a folder containing an existing database.
- **Create a blank (empty) database (for new users).**

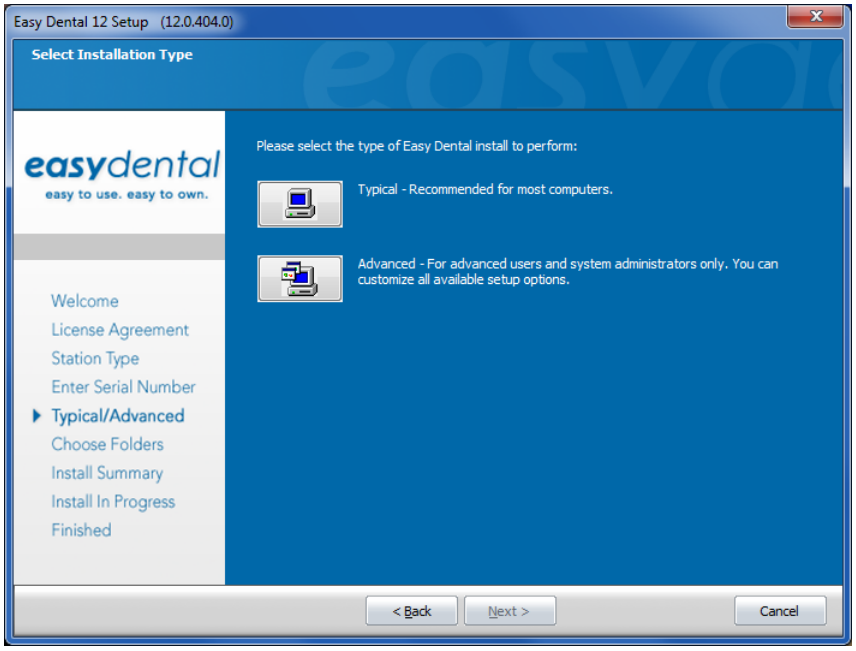
The Edit Serial Number screen appears.



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

Note: 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 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.

The following Select Installation Type screen appears.

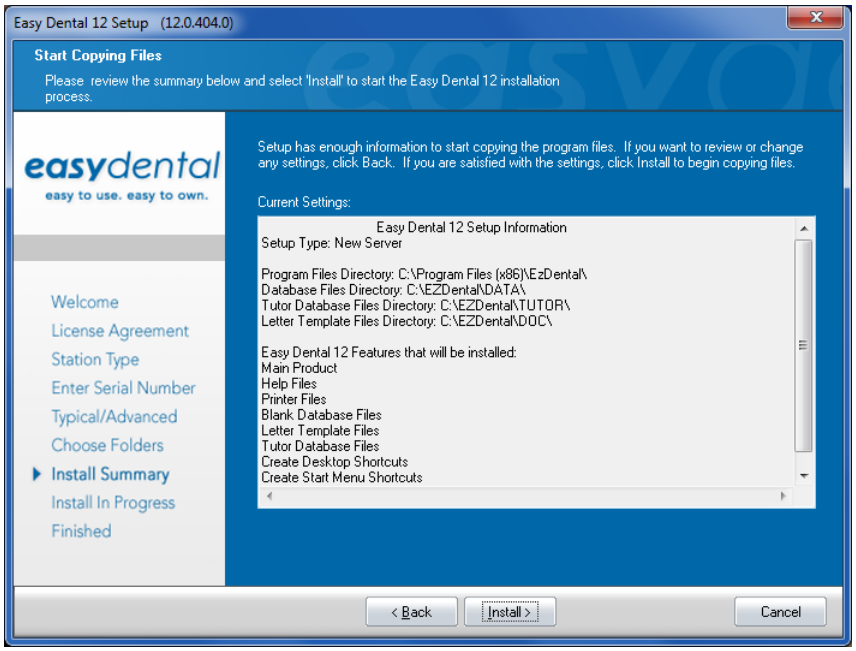


9. Select one of two installation types:

   - **Typical** – (Recommended for most computers.) Folders are placed in the default locations, and all of the default Easy Dental features are installed.
   - **Advanced** – You can specify the location of the Easy Dental files.

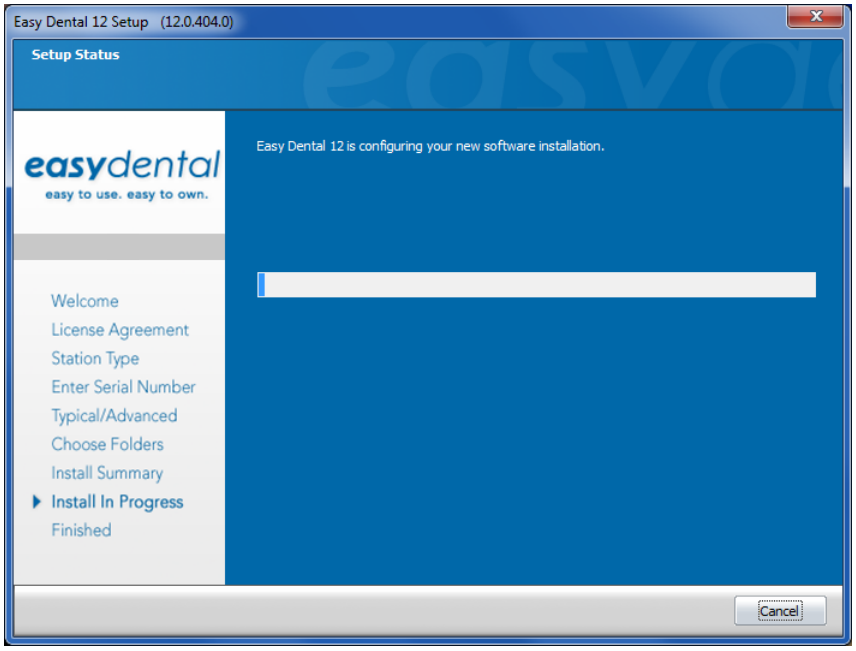
   Note: If you are upgrading, you are not asked to choose an installation type, and the Easy Dental installation program selects the current location as the destination.

   The Start Copying Files screen appears.

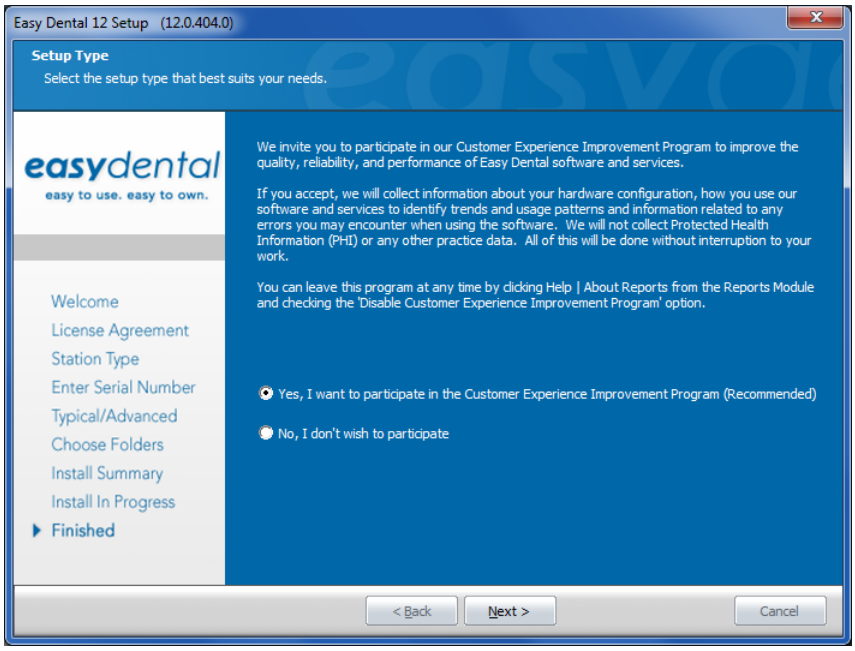


10. Review the settings that have been specified for your installation. To make changes to any of the settings, click **Back** and change the desired settings. When the settings are correct, click **Install** to begin installing Easy Dental.

    The Setup Status screen appears.



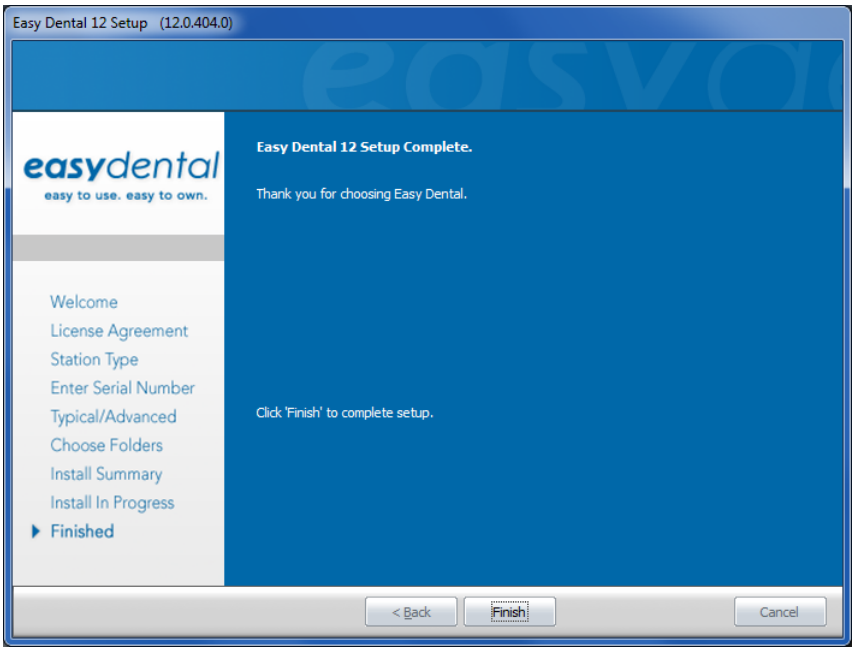
After the files have been copied, the following screen appears.



11. Select one of the following options, and then click **Next**.

- **Yes, I want to participate in the Customer Experience Improvement Program (Recommended)**.
- **No, I don't wish to participate**.

The Easy Dental Setup Complete screen appears.



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

Important: 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

If you are upgrading from a previous version of Easy Dental, you can update your workstations automatically. For a new Easy Dental installation, download and install Easy Dental 12 and then use the Update Manager to install the Easy Dental 12.2 client software.

Updating Workstations Automatically

1. Open Easy Dental on a computer that has not yet installed the required updates, such as Easy Dental 12.2.

   A message 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\12.2.
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**, or double-click the Easy Dental shortcut on the desktop.

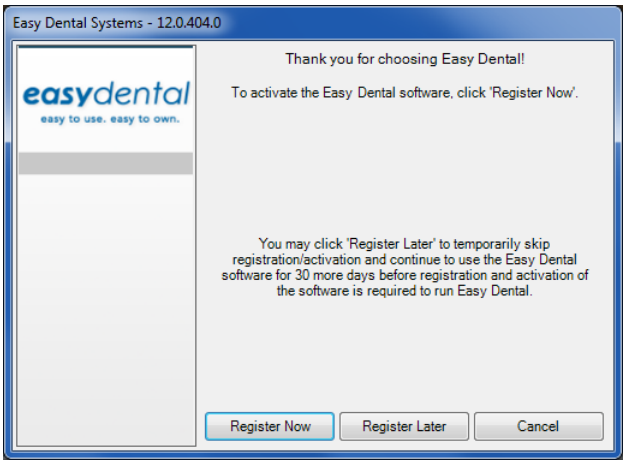
Registering/Activating Easy Dental

In order for Henry Schein One to know which version of Easy Dental you are using to provide you with updates, you must register and activate Easy Dental 12.2. Registration is only necessary if you have not registered your previous version of Easy Dental.

In Easy Dental 12.2, 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 12.2 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**.

Important: 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.

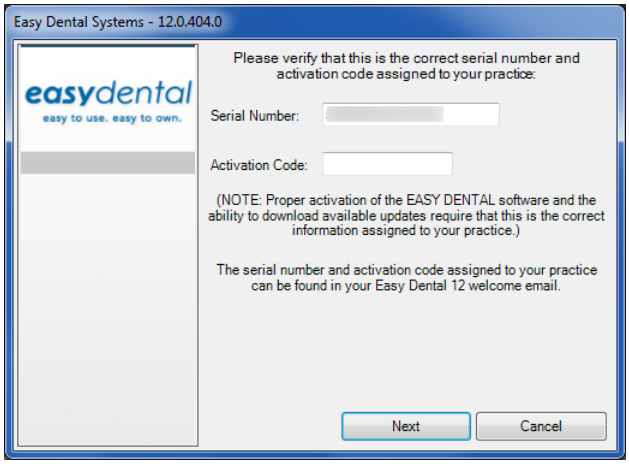
Register Now

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

To register your software

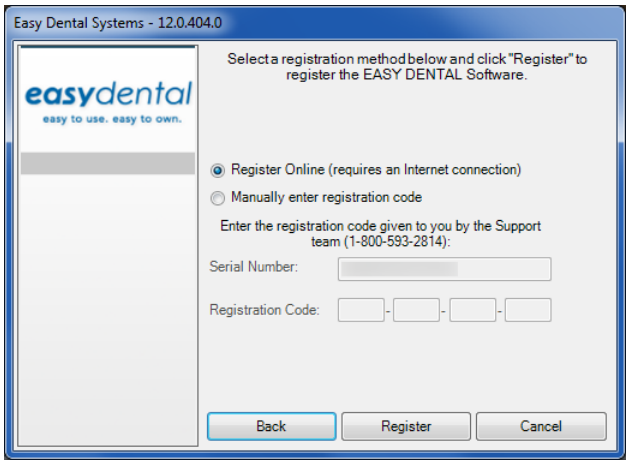
1. From any workstation, in the registration/activation dialog box, click **Register Now**.

   The serial number and activation code verification dialog box appears.



2. The serial number you entered when you installed Easy Dental 12.2 is displayed in the **Serial Number** field. Verify that the serial number listed matches the serial number assigned to your office.
3. In the **Activation Code** field, enter the activation code assigned to your practice.
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.



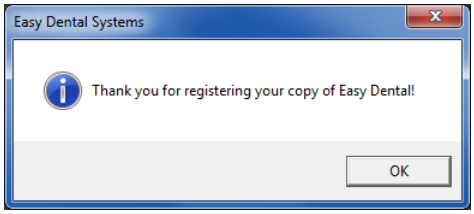
5. You have two registration options: register online or manually enter a registration code. Select the desired option and follow the directions below to register/activate your software.

Registering Online

To register and activate your Easy Dental software online

1. Click **Register**.

   The registration utility verifies your serial number and automatically registers/activates your software. A message appears when the activation has been completed successfully.



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

Entering the Registration Code Manually

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.
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 on your Serial Number & Activation Code card is for online registrations only and is not the registration code that you enter here.

3. Click **Register**.

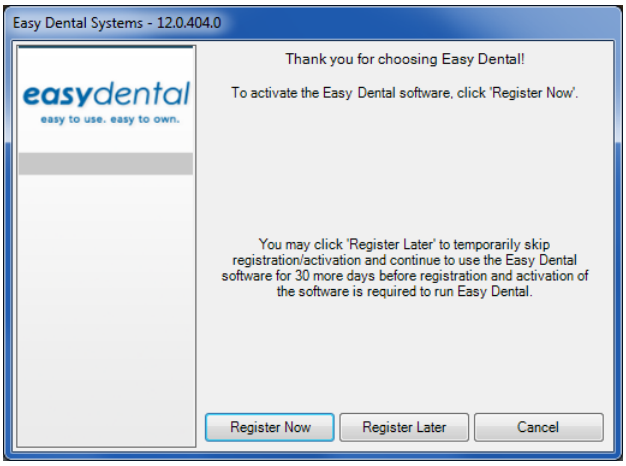
   A message appears when the activation has been completed successfully.
4. Click **OK** to close the message box and open the module you were trying to access.

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 12.2, 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 12.2.

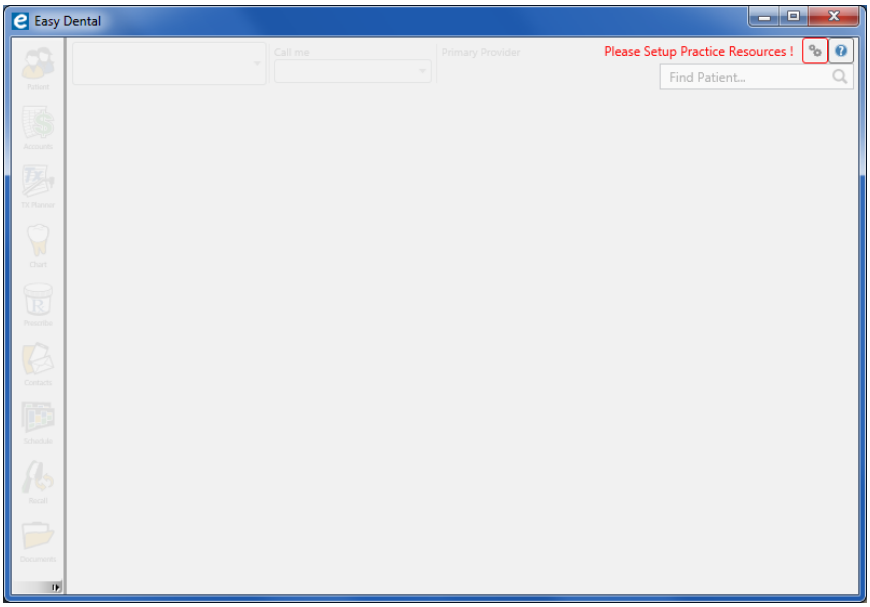
Since registration/activation is required, you can only click Register Later for 30 days after you install Easy Dental 12.2. After 30 days, the Register Later button is disabled on the registration/activation dialog box. At that point, you must register Easy Dental 12.2 before you can access the program.



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

Opening Easy Dental for the First Time

If this is the first time you have installed Easy Dental, when you open it, the following screen appears.



Click the Settings button (outlined in red) to set up your practice resources. Please refer to the Easy Dental Help topic “Setting up Easy Dental” in the Reports module Help for links to the various topics that will guide in setting up your practice and your practice resources.