



User Manual

Software Clinic S. C.

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1. Downloading, installing, activating SmartDental

1.1. Abbreviations used in the manual

LMB – left mouse button

RIGHT-CLICK – right mouse button

MPW – main program window

1.2. Tips

For the first time, you need to log in as 'Administrator'.

Remark! The 'Password' field should be left blank until the user sets a password.

1.3. Data security – Important!! Read and apply.

The key to the security of data in Electronic Medical Records (EHR) is to ensure their confidentiality and **protection against loss**, in accordance with the requirements of the GDPR. The SmartDental system offers the necessary tools for data protection and archiving, supporting the Customer, who is the personal data controller, in its obligations under the GDPR.

The responsibilities of the personal data controller (Customer) include:

- **Data Security Management:** Ensuring that the work environment is secure and protects against the risk of equipment failure, virus attacks, and other digital threats.
- **Contingency Plan Implementation:** Establish and regularly test contingency procedures to restore data quickly if necessary.
- **Regular Data Archiving and Protection:** Continuous, secure data archiving and protection in accordance with GDPR guidelines.
- **Legal and Operational Awareness:** Understanding the responsibilities and rights arising from the role of a data controller, including responding appropriately to data security incidents.

SmartDental supports the data controller by providing appropriate tools and functions, but the ultimate responsibility for data protection lies with the Customer, who acts as the personal data controller in the context of the GDPR.

Items that are subject to archiving:

- Database
- SmartDental 2.0/Docs directory or DentalDocs shared folder

- [SmartDental 2.0/RTG directory](#) or [DentalRTG shared folder](#)

Suggested security measures for SmartDental data backups:

- 1) At least once a day, make backups to an external drive (e.g. flash drive, portable drive, network drive).
[The Main Window > Tools > Data backup](#).
- 2) Set the Windows Task Scheduler to copy the database and directories. The script is available on request from the manufacturer.
- 3) Use features available on your Server device for automatic data backup and archiving (Windows, Linux, NAS network drives).
- 4) Secure your data by encrypting the data on the disk.

1.4. About SmartDental

SmartDental is an innovative software dedicated to dental practices and clinics. What distinguishes SmartDental from other dental software is its logical structure, which ensures easy and intuitive usage, similar to the usage of many popular desktop software solutions.

The main features of SmartDental, which make the work of the practice/clinic much smoother and better organized, are:

- Patient registration.
- Keeping medical records in electronic form (EHR).
- Treatment planning.
- Planning, tracking and settlement of prosthetic works.
- Recording periodontal examinations.
- Financial settlements and issuance of sales documents.
- SMS notifications and campaigns (SMS gateway, Android phone).
- Patient groups and discount groups.
- Warehouse management and procurement.
- Documentation of sterilization process and used packages.
- Administration and reporting on the operations of the clinic.
- Remote access to appointments schedule for employees (mobile app for iOS and Android).
- Possibility of multi-computer and multi-site configuration.

SmartDental, created by combining IT experience with dental practitioner's experience, has been adapted to the specifics and expectations of dental clinics. The well-thought-out and logical structure of this software, combined with comprehensive functionality, makes it easy to use, while allowing for further development in future.

Thanks to the permissions system, each employee has precisely defined access to individual parts of the software, which allows it to be adapted to different types of dental facilities – both single-computer and multi-computer ones.

In addition, the software allows for managing multiple treatment locations and for the separation of entities and organizational units. By integrating with your existing practice website using an "online" appointment booking module, SmartDental can simplify the process of booking appointments, providing better access to medical services for your patients and greater convenience for you.

1.5. Requirements

- Windows operating system currently supported by Microsoft;
- System component - Microsoft .NET Framework 4.8 or;
- A computer that meets the minimum requirements for the installed operating system;
- Printer and scanner running on Microsoft Windows;
- Microsoft Windows network (for multi-user operation);
- TCP/IP network protocol;
- The minimum screen resolution is 1366 × 768;
- The recommended screen resolution is FullHD or higher;
- Recommended size of text and other system elements: 100%;
- A Wacom STU or DTU-1141b series e-signature device (if using an electronic signature) or a Windows pen tablet.

SmartDental can be ran on an Apple operating system (MacOS) using [Parallels Desktop for Mac](#).

1.6. Downloading the software

A demo version of SmartDental is available for download [from the manufacturer's website](#).

1.6.1. Downloading the software for initial installation

SmartDental requires *Microsoft .NET Framework 4.8* to operate properly.

Some operating systems have the appropriate version of *the .NET Framework* built in or preinstalled and thus do not require you to install it.

REMARK! The SmartDental installer will inform you if you do not have the required *.NET Framework*.

1.6.2. Software update

REMARK! Before and after each update, you should perform a database backup:
[Tools > Data backup > Backup](#)

REMARK! In a multi-computer configuration, SmartDental instance running on the server computer should be updated first.

1.6.2.1 Manual update

The SmartDental installer (latest version of SmartDental 2.0 software), available from the manufacturer's website, can be used to manually update the software to a newer version.

1.6.2.2 Automatic update

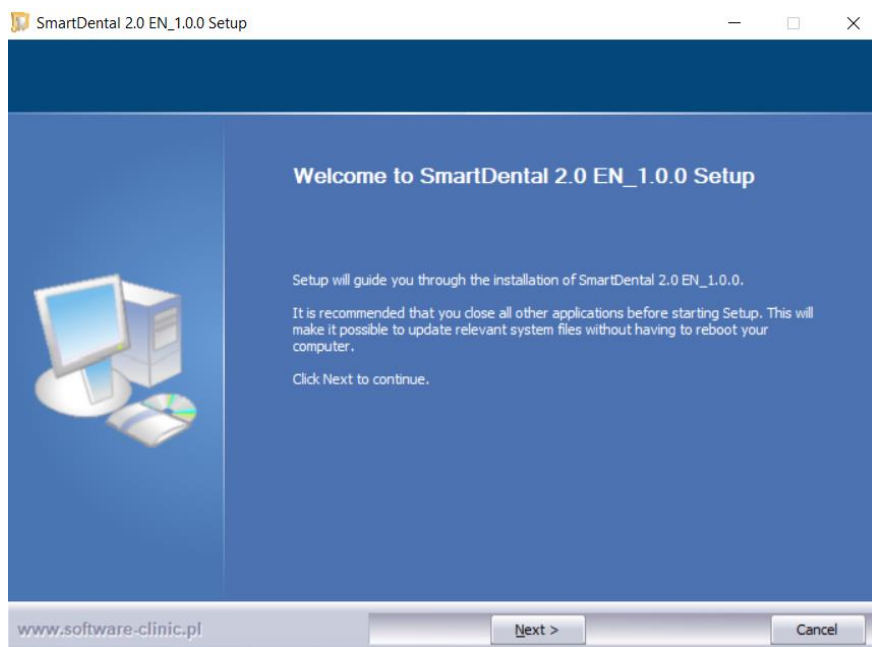
The automatic update of SmartDental is available in the following menu location:

Settings > Update

1.7. Installing the software

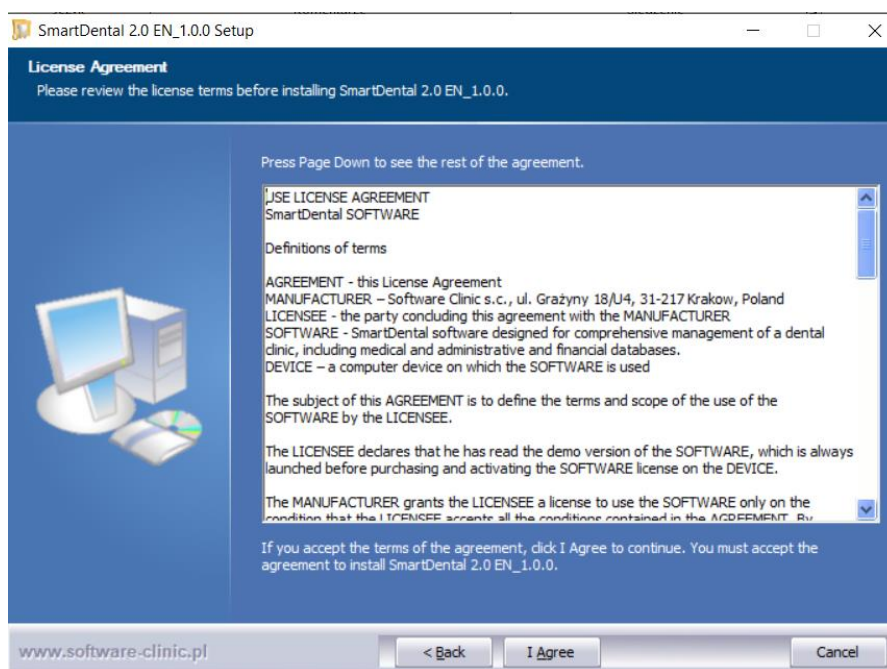
1.7.1. Installation Steps

- Unzip and run the previously downloaded SmartDental installer.
- If the "User Account Control" window appears, you should allow the software to make changes to your computer.
- In the welcome window, click **Next >**.



- In the "License Agreement" window it is necessary to read the content of the software license. Only agreeing to the license terms will allow to proceed with the installation.

Downloading, installing and activating SmartDental



1.7.2. Applies to systems without the corresponding *.NET Framework*

When you install SmartDental you may receive a message that you do not have the correct version of the *.NET Framework* installed. In that case you should follow the instructions provided by the installer, i.e.:

1. Close the installer.
2. Download the appropriate version of the *.NET Framework* available from Microsoft website.
3. Install the correct version of the *.NET Framework*, and if you are prompted to restart your computer, do so.
4. After installing the *.NET Framework*, restart the SmartDental installer.

1.8. First launch of the software

1.8.1. Running a trial version – activation wizard


1.8.1.1 Overview

When you first launch the SmartDental software on your computer, the "First time launch" window will appear. Then, a trial version of the program is automatically launched, allowing you to familiarize yourself with SmartDental's full functionality. Running the trial version is free of charge and does not oblige you to purchase the commercial version. If you have previously assigned a commercial license to your computer, it will be automatically activated.


Online activation requires an Internet connection. Registered users only need to provide their login (e-mail address) and password. If you are not registered, please fill in the required details and click "Register".

Downloading, installing and activating SmartDental

Launching SmartDental for the first time




Welcome, please log in to start the trial version of SmartDental.
If you already have a license for this computer - the commercial version will be launched.



Log in

E-mail

Customer password



Registration


E-mail

Customer password

Confirm password

Contact person

Phone no.



The Personal Data Administrator (PDA) is Software Clinic s.c. with its registered office in Kraków, ul. Grażyny 18/U4, 31-217 Kraków, Poland. PDA can be contacted by e-mail at kontakt@software-clinic.pl.

The personal data provided will be processed on the basis of art. 6 sec. 1 let. a) of the general regulation on the protection of personal data of April 27, 2016 in order to set up a user account, which is necessary to run the test version of the SmartDental software, report errors, fulfill orders, etc. Your personal data will be stored until you withdraw your consent.

☐ I consent to the processing of my personal data by Software Clinic s.c. with its registered office in Kraków, ul. Grażyny 18/U4, 31-217 Kraków, in order to launch the test version of the SmartDental software, report errors, process orders, etc. I declare that the data was provided voluntarily after having read the above information clause and the instruction regarding the right to access my data and opportunities to improve them. I am aware that my consent may be revoked at any time.

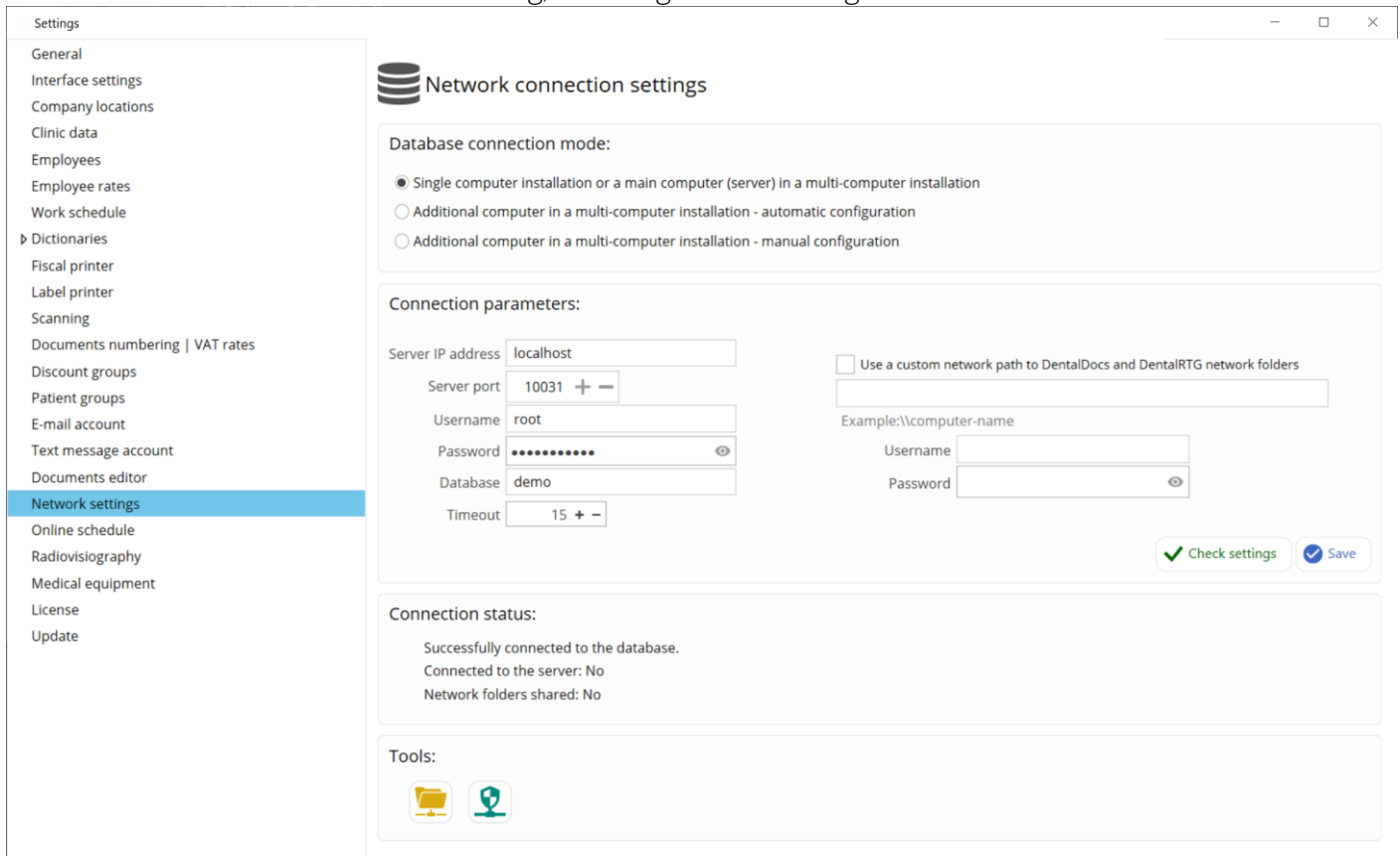
☐ Pursuant to the Act of July 18, 2002 on the provision of electronic services (Journal of Laws No. 144, Item 1204, as amended), I consent to the sending of commercial information by electronic means by Software Clinic s.c.

1.8.2. Configuring a database connection

When you start the SmartDental software for the first time you may need to configure a database connection. In that case the "Network connection settings" window will automatically open. This window also opens whenever there are problems connecting to the database and is also available in the [Settings > Network settings](#) menu of SmartDental.

A detailed description of the connection configuration steps can be found in the [Configuring a database connection](#) section of this document.

Downloading, installing and activating SmartDental



Settings

- General
- Interface settings
- Company locations
- Clinic data
- Employees
- Employee rates
- Work schedule
- Dictionaries
- Fiscal printer
- Label printer
- Scanning
- Documents numbering | VAT rates
- Discount groups
- Patient groups
- E-mail account
- Text message account
- Documents editor
- Network settings**
- Online schedule
- Radiovisiography
- Medical equipment
- License
- Update

Network connection settings

Database connection mode:

- ☒ Single computer installation or a main computer (server) in a multi-computer installation
- ☐ Additional computer in a multi-computer installation - automatic configuration
- ☐ Additional computer in a multi-computer installation - manual configuration

Connection parameters:

Server IP address:

Server port: + -

Username:

Password: 👁

Database:

Timeout: + -

☐ Use a custom network path to DentalDocs and DentalRTG network folders

Example: \\computer-name

Username:



Password: 👁

✓ Check settings ✓ Save

Connection status:

Successfully connected to the database.
Connected to the server: No
Network folders shared: No

Tools:

The **Connection status** section informs you whether the connection was correctly established and if not, then what steps you need to take to get the connection set up correctly.

1.8.2.1 Single computer installation or server in a multi-computer installation

If you want to run SmartDental as a stand-alone version or as a master computer (server) in a multi-computer installation, then please select the option **Single computer installation or a main computer (server) in a multi-computer installation**.

If there no database connection, then please follow the information in **Connection status** section.

1.8.2.2 Multi-computer installation – additional computers

1.8.2.2.1 Additional computer in a multi-computer installation – automatic configuration

This option is not recommended at this time as there may be issues with automatically establishing a connection due to firewalls etc. This option is appropriate if you want the additional computers (clients) to connect to a database located on the master computer (server) that also acts as a workstation, i.e. the SmartDental software is installed on it. When setting up this type of connection, SmartDental software must be running on the server computer.

Remark! Automatic configuration may not work properly with advanced firewall settings.

1.8.2.2.2 An additional computer in a multi-computer installation – manual configuration

Manual configuration is the recommended option for a multi-computer installation. This option is also useful for advanced multi-computer setups, especially when the database is located on a Linux server, NAS drive, or other remote server. In this case, it is necessary to provide the exact connection parameters to for the MariaDB database connection on each client computer.

1. **IP address or server hostname:** Specifies the location of the server where the database is located.
2. **Port Number:** Indicates the port on which the database server listens for connections. By default, in MariaDB, the port is 3306.
3. **Database name:** Specifies the name of the database to which we want to connect.
4. **Username:** This is the login of the user who has access to the database.
5. **Password:** A password assigned to a database user to authenticate when connecting.

1.8.3. Logging into SmartDental for the first time

For the first time, you should log in as 'Administrator'.

Remark! The 'Password' field should be left blank until the user sets a password.

1.8.4. Database selection

In the trial version, a demo database is provided, containing sample data, such as a list of patients, employees, default dictionaries of diagnoses and procedures. This allows to test and evaluate SmartDental using sample data before making a purchase decision. The database in the trial version can contain up to 50 patients and/or 50 registered appointments.

The trial version can be extended to a fixed date at the customer's request. If you want to start entering actual data, you should switch the database from the trial one ("demo") to production one ("clinic"). You can switch the databases at any time in the "Settings > Network settings" window.

In the "Database" field of the above window please type either "demo" or "clinic", then press "Check settings" and then "Save".

1.8.5. Upgrade the trial version to the commercial version

If the software runs in a trial version mode and the user has purchased a commercial license, then license activation should be performed in Settings > License window.

Downloading, installing and activating SmartDental

The screenshot shows the 'Settings' window with the 'License' tab selected. The window is titled 'Software license' and contains two main sections: 'Software license' and 'Subscription'.

Software license section:

- Basic information:** User: [redacted], License key: [redacted]
- License in use:** Status: Demo version. A list of modules with checkboxes: Basic module, Reception module, Treatment module, Billing and sales documents module, Digital imaging module, Referrals module, Documentation templates and digital signature module, Text message | E-mail communication module, Prosthetics module, Warehouse module, Management module, Sterilization module, Doc Planner module, Periodontal module, Patient consents module.
- Online license status:** Status: Demo version. A list of modules with checkboxes: Basic module, Reception module, Treatment module, Billing and sales documents module, Digital imaging module, Referrals module, Documentation templates and digital signature module, Text message | E-mail communication module, Prosthetics module, Warehouse module, Management module, Sterilization module, Online booking module, Periodontal module, Patient consents module.
- Actions:** Load online license (cloud icon), Deactivate license (red circle with slash), Delete license (red circle with slash).

Subscription section:

- Subscription in use:** Status: Inactive. Subscription until: 2022-11-17.
- Online subscription status:** Status: Inactive. Subscription until: 2022-11-17.
- Actions:** Load online subscription (cloud icon), Delete subscription (red circle with slash).

If the computer is connected to the Internet, the **Online license status** section will show information about the modules you have purchased. To activate them, please click the **Load online license** button.

1.8.6. Activate your software update and technical support subscription

In order to use new versions of the software and receive technical support from SmartDental, it is necessary to have an active software update and technical support subscription. The subscription is free for the first 12 months of using the software and automatically loads when the software starts.

To activate your subscription at any time, please go to **"Settings > License > Load online subscription"** section.

If you are connected to the Internet, you will see the information about your current subscription in the **"Subscription"** section. To activate your subscription, simply click the **"Load online subscription"** button.

2. Software configuration

SmartDental was designed to minimize end-user errors. This manual contains additional information to makes it easier to understand the individual components of SmartDental and to draw attention to the elements which may not be immediately obvious from the user's point of view.

2.1. Configuring a database connection

SmartDental can operate in a single-computer or multi-computer environment. In case of a multi-computer operation, the program must be installed on both the main computer and the additional computers. The installation process is described in detail in the [Installing the](#) section of this manual.

Both single-computer and multi-computer configurations can be achieved by using a separate (dedicated) computer as a database server. This computer can run Linux (e.g. NAS) or Windows. Additional network configuration and data collection options are described in [Possible causes of connection problems between computers](#).

2.1.1. Connecting computers to a LAN

For a reliable connection between computers, it is recommended to use a wired (ethernet) network. A wireless network may be interfered with by other devices and may prevent the SmartDental software from running smoothly.

A local area network (LAN) can have different configurations depending on the devices used (router, switch, modem, direct connection), service provider and additional software (firewall, antivirus, etc.). Therefore, if you encounter connectivity problems between SmartDental workstations, the configuration should be commissioned to an IT specialist or you should seek remote technical support from the SmartDental team.

The connection configuration is performed in the [Network connection settings](#) window, which is automatically opened in case of connectivity issues and is also available at any time in the [Settings > Network settings](#) menu.

2.1.2. Setting up the software on the master (server) computer

If you want to run SmartDental in a stand-alone (single-computer) version or as a master computer (server) in a multi-computer installation, then please select [Single computer installation or a main computer \(server\) in a multi-computer installation](#) option in the [Network connection settings](#). SmartDental will then check the connection to the database on the local computer.

Software Configuration

If the connection check is successful, the message **Yes** will be displayed in the **Connection Status** section next to the relevant items. Please save your configuration changes by pressing the **Save** button.

If the software is unable to establish a connection to the database, then an error will be displayed in the **Connection status** section along with a suggested solution.

The demo version of SmartDental software includes MariaDB server version 10.2. For a standard database installation, please use the following settings in the **Network connection settings** window:

Server IP address: localhost or 127.0.0.1

User: root

Password: smartdental

Database: demo or clinic

Port: 10031

Settings

General
Interface settings
Company locations
Clinic data
Employees
Employee rates
Work schedule
Dictionaries
Fiscal printer
Label printer
Scanning
Documents numbering | VAT rates
Discount groups
Patient groups
E-mail account
Text message account
Documents editor
Network settings
Online schedule
Radiovisiography
Medical equipment
License
Update

Network connection settings

Database connection mode:

- ☒ Single computer installation or a main computer (server) in a multi-computer installation
- ☐ Additional computer in a multi-computer installation - automatic configuration
- ☐ Additional computer in a multi-computer installation - manual configuration

Connection parameters:

Server IP address: localhost

Server port: 10031

Username: root

Password: [masked]

Database: demo

Timeout: 15

☐ Use a custom network path to DentalDocs and DentalRTG network folders

Example: \\computer-name

Username: [input]

Password: [masked]

☒ Check settings ☒ Save

Connection status:

Successfully connected to the database.
Connected to the server: No
Network folders shared: No

Tools:

Fig. Database connection

For a multi-computer installation, you will also need to:

- Share network folders on the server computer: **C:\SmartDental 2.0\Docs** and **C:\SmartDental 2.0\RTG** – in the **Tools** section of the **Network settings** please click the folder icon and then

click **Share network folders** to share these folders as **DentalDocs** and **DentalRTG** shared folders using built-in Windows folder sharing feature.

- Allow remote connection to the server – in the **Tools** section please press the  icon.

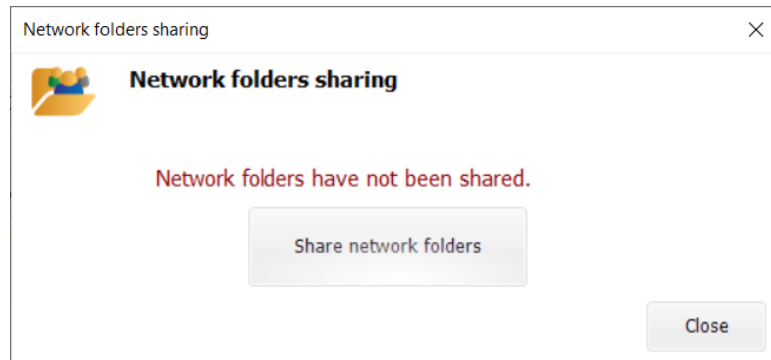


Fig. Checking and Sharing Network Folders

REMARK! If you select **Single computer installation or a main computer (server) in a multi-computer installation**, there are several reasons why you might face issues connecting to the MySQL database:

- a) There is no MySQL database server installed on this computer

Solution: Follow the instructions in the **Connection status** section.

- b) The connection to the database is blocked by the Windows firewall.

Solution: In the **Tools** section, press the  icon.

Once you have done the above, you should click on the **Check settings** button and see the following:

Software Configuration

The screenshot displays the 'Settings' window with the 'Network settings' tab selected in the left sidebar. The main area is titled 'Network connection settings' and contains three sections:

- Database connection mode:** Three radio buttons are present. The first, 'Single computer installation or a main computer (server) in a multi-computer installation', is selected.
- Connection parameters:** This section includes input fields for 'Server IP address' (localhost), 'Server port' (10031), 'Username' (root), 'Password' (masked with dots), and 'Database' (demo). A 'Timeout' field is set to 15. To the right, there is a checkbox 'Use a custom network path to DentalDocs and DentalRTG network folders' which is unchecked, followed by an 'Example:\\computer-name' and fields for 'Username' and 'Password'.
- Connection status:** This section shows the status of the connection: 'Successfully connected to the database.', 'Connected to the server: No', and 'Network folders shared: Yes'.

At the bottom right of the 'Connection parameters' section are two buttons: 'Check settings' (with a green checkmark icon) and 'Save' (with a blue checkmark icon). At the bottom left of the 'Network connection settings' section is a 'Tools' button with a shield icon.

Fig. Connection configured correctly

2.1.3. Automatic configuration of the software on additional computers

This option is not recommended since there may be difficulties automatically establishing a connection due to your firewall settings. We recommend that you follow the manual route for configuring a multi-computer installation of SmartDental.

If you do plan to use this option, then please make sure that the computer that acts as the server in the multi-computer installation is turned on and that SmartDental is running on it.

Then, in the **Network connection settings** window, select the option **Additional computer in a multi-computer installation – automatic configuration**.

Press **Check settings**. The status of the successful connection can be found in the **Connection status** section.

2.1.4. Manual configuration of the software on additional computers

This is the recommended option for configuring a multi-computer installation of SmartDental.

Please make sure that the computer that acts as the server in the multi-computer installation is turned on.

In the **Network connection settings** window select the option **Additional computer in a multi-computer installation – manual configuration**.

Next, enter the IP address of the server computer and the rest of the connection details and press the **Check Settings** button.

The status of the connection can be found in the **Connection status** section.

Remark! You can check the IP address of the server computer by running the Windows command prompt (cmd command in Start > Run) and then typing "ipconfig /all" in the command prompt.


2.1.5. Possible causes of connection problems between computers

There are five main reasons why you might have trouble connecting to a master (server) computer:

a) **The server computer is down**

Solution: Make sure that SmartDental is configured as a stand-alone installation or the main computer (server) in a multi-computer installation.

b) **The server computer does not allow you to connect remotely**

Solution: In the **Network connection settings**, in the tools section, press **Allow remote connection to the server**. 

c) **Windows Firewall does not allow you to connect to the database on the server computer**

Solution: In **Network connection settings** on the server computer, press the **open port** icon: .

d) **Your antivirus program blocks the connection of the client computer to the server.**

Solution: Temporarily disable the antivirus on the server computer and the client computer and try to connect again on the client computer. If the connection is established correctly, then you should add the appropriate exceptions in the antivirus software rules and restart it, or change the antivirus software to a different one. If the connection is not established, then the problem is probably with the network.

INFORMATION! SmartDental runs fine on computers with most antivirus software (including AVG Antivirus and Avast), but it can be interfered with by Kaspersky and McAfee.

e) **The local network is not configured correctly.**

Solution: Make sure that network computers can "see" each other, such as using the "ping" command, and that shared directories are visible and accessible in the network environment. Usually, this type of configuration work should be outsourced to a specialist or performed remotely by our technical support.

2.1.6. Advanced manual configuration of SmartDental on servers

Applies if you place the SmartDental database on a server device (without SmartDental software installed), i.e. Linux, Windows Server, NAS network drives, and/or if you have a custom network location for the **DentalDocs** and **DentalRTG** shared folders.

In this configuration, each workstation with SmartDental installed on it is a client of the server computer. In the **Network connection settings** window, select the server parameters and set **Use a custom network path to the DentalDocs and DentalRTG shared folders**.

Your MySQL or MariaDB server should be configured to allow remote connections to it from client computers with **Select, Insert, Delete, Update** permissions for all computers and additionally **Create, Drop, Alter** for at least one client computer from which SmartDental will be able to update the database structure. This computer should always receive SmartDental updates first.

Settings

- General
- Interface settings
- Company locations
- Clinic data
- Employees
- Employee rates
- Work schedule
- ▶ Dictionaries
- Fiscal printer
- Label printer
- Scanning
- Documents numbering | VAT rates
- Discount groups
- Patient groups
- E-mail account
- Text message account
- Documents editor
- Network settings**
- Online schedule
- Radiovisiography
- Medical equipment
- License
- Update

Network connection settings

Database connection mode:

- ☐ Single computer installation or a main computer (server) in a multi-computer installation
- ☐ Additional computer in a multi-computer installation - automatic configuration
- ☒ Additional computer in a multi-computer installation - manual configuration

Connection parameters:

Server IP address: 192.168.1.225

Server port: 10031 + -

Username: root

Password:

Database: demo

Timeout: 15 + -

☒ Use a custom network path to DentalDocs and DentalRTG network folders

\\192.168.1.225

Example: \\computer-name

Username:

Password:

☒ Check settings ☒ Save

Connection status:

Successfully connected to the database.

Access to shared network folder DentalDocs: Yes

Access to shared network folder DentalRTG: Yes

Tools:


2.1.7. Share Docs and RTG folders

Local folders

In case of a stand-alone installation and installation on a server computer, by default SmartDental uses the local **Docs** and **RTG** folders located in the SmartDental installation folder, e.g. C:\SmartDental 2.0\

Shared network folders

In a multi-computer installation, those folders should be shared on the local network under the names **DentalDocs** and **DentalRTG**, respectively.

If SmartDental is installed on the server, the directory sharing can be easily performed from SmartDental's **Network connection settings** window, by clicking folder  icon in the **Tools** section.

Otherwise, you can manually share these directories. In that case the actual name and location of these directories does not matter – what is important is that they have appropriate **share names** within the network, i.e. **DentalDocs** and **DentalRTG**.

Directory security

If the shared directories are protected by a username and password, then please provide those on each client computer, under the **Use a custom network path to the DentalDocs and DentalRTG folders** field in the **Network connection settings**.

2.2. Minimal software configuration

2.2.1. Basic configuration

Below are the basic elements of the software that must be configured before using SmartDental.

2.2.1.1 Configuration of doctors and other employees

In order for SmartDental to function properly, you must add at least one user belonging to the treatment category. Each user must be assigned appropriate permissions. Configuration of doctors and other employees is available in **Settings > Employees**.

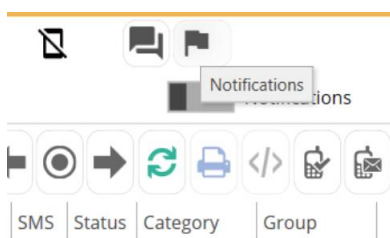
2.2.1.2 Administrator

The administrator is the default user that exists from the moment the program is installed. The administrator is the only user who cannot be removed. In order to ensure data security, it is required that the Administrator, like other users, has a password set.

2.2.1.3 User passwords

A password must be set for each user to access the program. The password should contain at least 8 characters, including lowercase and uppercase letters, and special characters or numbers. The program requires you to change your password every 30 days.

Notification about the need to change a password for a given user appears in the main window of the program, in the **Notifications** section.



If the password is forgotten, it is possible to generate a new password in the login window and to have it sent to the e-mail address specified in the employee's data. If no e-mail address was provided for a given employee, then a new password will be sent to the e-mail address provided during the activation of SmartDental. It is recommended to immediately change passwords generated this way after logging back to SmartDental.

A user with **Administration – Adding employees** permissions has the ability to set and to remove a password to other employees.

2.2.1.4 User permissions

Thanks to the permissions system, each employee has strictly defined access to individual parts of the SmartDental software - reception, treatment, cash register, logistics, manager, administration, etc. This way the software can be adapted to both a single-computer office as well as a multi-computer dental facility divided into departments. At the same time, the system of user permissions allows you to configure in detail the employee's access to confidential data stored in SmartDental.

Each employee may be granted any number of permissions, but individual categories of users must have permissions related to their core scope of activity (e.g. a doctor or other employee performing medical treatments must have a permission in the treatment category).

2.2.1.5 User permissions – categories and permissions

There are 7 categories of users:

1. **Administration** – intended for technical employees, the minimum permissions set is one permission from the **Administration** category;

2. **Treatment** – intended for employees providing dental treatment (e.g. doctors, hygienists), the minimum permission set is **Treatment – treating patients**;
3. **Reception** – intended for personnel dealing with patient registration;
4. **Manager** – intended for personnel dealing with the clinic's financial data;
5. **Assistant** - intended for personnel assisting in treatments;
6. **Dental technician**;
7. **X-ray technician**;

Each category requires a minimum of one permission of each type. Each employee assigned to one of the categories can be granted additional permissions.

If a given employee will provide treatment in addition to other activities, he or she must be assigned the **Treatment** category (e.g. a receptionist who is also a dental hygienist or a business owner who is also a doctor).

Employee permissions

Reception | Adding/editing patients

- Access to the list of patients
- Viewing and editing the address data of the patient or his company
- Adding, editing a patient or their company

Reception | Managing appointment schedule

- Access to the appointment schedule
- Access the list of appointments of other employees
- SMS communication with patients
- Email communication with patients
- Add, edit, or delete appointments
- Adding, removing free online appointments
- View patient appointments
- Approve or decline online appointment bookings
- Access to the online (web) appointment schedule
- Export of appointments to Outlook

Reception | Visibility of contact data

- Access to the patient's contact details (e.g. phone, address)

Treatment | Treating patients

- Access to the list of patients
- View patient appointments for an employee
- Access to the online appointments schedule
- Admitting a Patient (adding an appointment)
- Adding and editing medical-dental history
- Adding X-ray images (file or scan)
- Access to appointments buffer
- Access to the patients' dental charts

Treatment | Medical records editor

Software Configuration

- Access to the electronic documentation editor (e.g. interviews, consents to treatment, referrals)

Treatment | Visibility into other employees' appointments

- Ability to view other employees' appointments

Treatment | Price change blocked

- Blocks the possibility of changing the prices of services when adding an appointment

Cash register | Patient billing

- Accepting payments and issuing sales documents
- Access to Patient Balance
- Access to financial data of users in the **Treatment** category, irrespective of the **Show other employees my financial data** setting of those users.

Cash register | Settlement of prosthetic laboratories

- Access to billing for prosthetic laboratories

Cash register | Settlement of employees

- Not Currently Used

Cash register | Settlement of contractors

- Not Currently Used

Logistics | Workflow of prosthetic works

- Access to the list of prosthetic works (view, add, edit)

Logistics | Procurement of supplies

- Access to the 'Warehouse' module
- Contractor list management
- Managing goods receipts
- Manage item issues
- Generating Item Orders
- Commodity list management

Manager | Summary of operations

- Full access to the clinic's work reports

Manager | Personal summary of operations

- Access to reports specific to an employee

Manager | Daily summary of operations

- Access to reports for only the current day and a specific employee

Manager | Reports on medical records and GDPR

- Access to the office documentation (admission book, diagnostic laboratory book, login reports, schedule history, patient data history, report of documentation made available to patients)

Manager | Clinic financials

Software Configuration

- Access to reports on financial data of the clinic

Administration | Software configuration

- Software settings
- Access to updates
- Access to database diagnostics
- Access to license activation
- Enable/disable training mode
- Commodity list management
- Contractor list management

Administration | Data backup

- Archiving and restoring the database

Administration | Adding employees

- Employee management
- Work schedule management

Administration | Configuring dictionaries

- Setting up medical dictionaries (diagnoses, procedures, medications)

Administration | Configuring discount groups

- Setting up discount groups

Remote access to own appointments - View

- Access appointments schedule from iOS/Android app, with access limited to viewing only own appointments

Remote access to own appointments - Edit

- Access appointments schedule from iOS/Android app, with access limited to viewing and editing only own appointments

Remote access to others' appointments - View

- Access appointments schedule from iOS/Android app, with access limited to viewing and editing your own appointments and viewing others' appointments

Remote access to others' appointments - Edit

- Unlimited access to appointments schedule from iOS/Android app

Visibility of contact data

- Access to patients' contact data (phone number, e-mail address) from iOS/Android app

Description of employee permissions in the **Treatment** category:

- Access to **each patient's Medical Card** along with a preview of treatments performed by other employees

- If an employee in the Treatment category does not have the **Show other employees my financial data** option checked, then the costs of treatments will not be visible to other employees who belong to the **Treatment** category.
- An employee can only edit or delete entries in the **Patient Card** made by himself/herself
- An employee cannot edit or delete the treatment history of other employees
- An employee can print the details of an appointment entered by another employee, but the costs of treatments will not be visible if the author of the entry does not have the option "**Show other employees my financial data**" checked.

2.2.1.6 User permissions - hiding financial data


To avoid viewing financial data between employees, you can turn off the **Show other employees my financial data option**.



In this case, other employees can't see this employee's financial data, except when the other employee has the **Cash register | Billing patients** permission, which overrides the **Show other employees my financial data** setting.

2.2.1.7 Displaying an employee in the online schedule (active online booking)

To set the presence of a given employee in the online booking system, when adding/editing an employee, select the option **Show employee in the online schedule**.

Employee | Edit

 Employee | Edit

Employee permissions

Category Treatment

☒ Reception | Adding/editing patients

☒ Reception | Managing appointment schedule

☒ Reception | Visibility of contact data

☐ Reception | Read-only schedule

☒ Treatment | Treating patients

☒ Treatment | Medical records editor

☒ Treatment | Visibility into other employees' appointments

☐ Treatment | Price change blocked

☒ Cash register | Billing patients

☒ Cash register | Settlement of prosthetic laboratories

☒ Cash register | Settlement of employees

☒ Cash register | Settlement of contractors

☐ Cash register | Settlement deletion blocked

☒ Logistics | Workflow of prosthetic works

☒ Logistics | Procurement of supplies

☒ Manager | Summary of operations

☐ Manager | Personal summary of operations

☐ Manager | Daily summary of operations

☐ Manager | Reports on medical records and GDPR

☐ Manager | Clinic financials

☒ Administration | Software configuration

☒ Administration | Data backup

☒ Administration | Adding employees

☒ Administration | Configuring dictionaries

☐ Administration | Configuring discount groups

☐ Remote access to own appointments - View

☐ Remote access to own appointments - Edit

Employee data


First name

Michael

Last name

Johnson

Password

 Set

Date of birth

1/3/1972

Date of employme

1/28/2024

Status

Active

Address

123 Elm Street

City

New York

Phone no. 1

1234567890

Phone no. 2

9876543210

E-mail

michael.johnson@example.com

Settings for employees from the 'Treatment' category.

Title

DDS

Personal ID no.

Personal ID no.


82013196431

License no.

1234567

RMC ID no.

Schedule color

 #FFF7B580

New schedule color

Undefined

☐ Show my financial data to other employees.

☒ Show employee in the online schedule.

Assign employees to locations.

Wybierz lokalizację

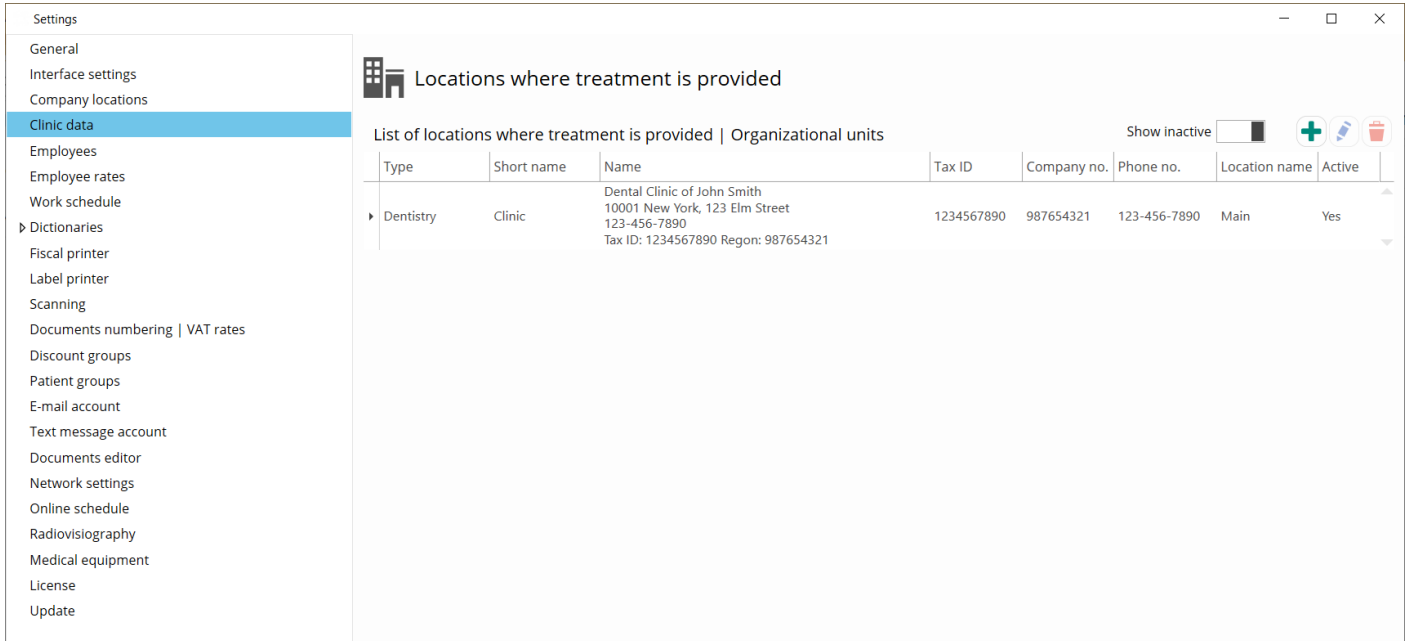
Additional information displayed for the employee in the online schedule

The order in the list of employees online

1

2.2.2. Treatment locations

Treatment locations allow to select where treatment is provided. At the login stage, each employee can choose a specific place where they provide treatment, which is then assigned to the activities performed by them in the program.



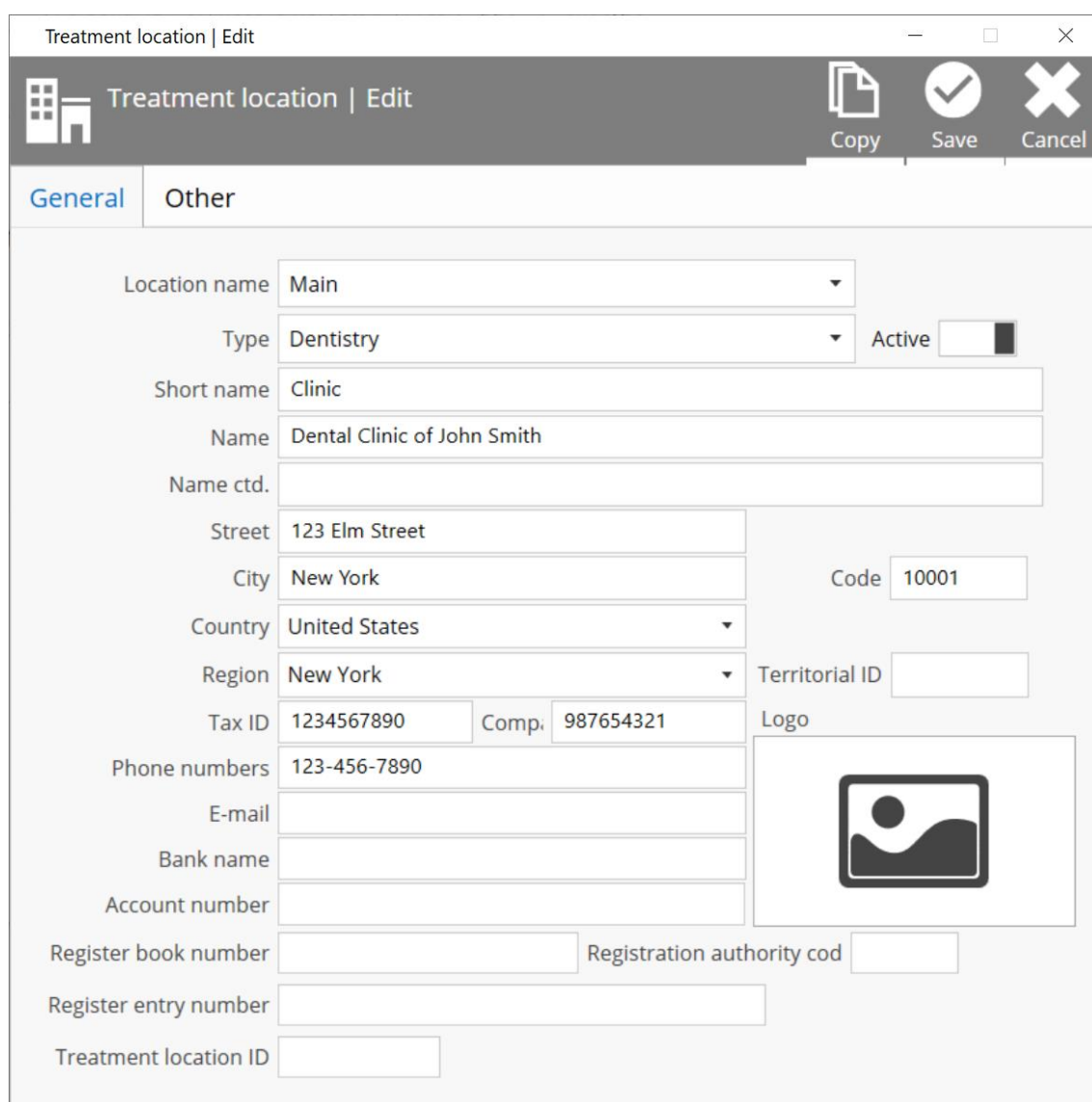
The screenshot shows the 'Settings' window with the 'Clinic data' section selected in the left sidebar. The main area displays 'Locations where treatment is provided' with a table of organizational units.

Locations where treatment is provided

List of locations where treatment is provided | Organizational units

Show inactive ☐

Type	Short name	Name	Tax ID	Company no.	Phone no.	Location name	Active
Dentistry	Clinic	Dental Clinic of John Smith 10001 New York, 123 Elm Street 123-456-7890 Tax ID: 1234567890 Regon: 987654321	1234567890	987654321	123-456-7890	Main	Yes



Treatment location | Edit

Copy Save Cancel

General Other

Location name Main

Type Dentistry Active ☒

Short name Clinic

Name Dental Clinic of John Smith

Name ctd.

Street 123 Elm Street

City New York

Country United States

Code 10001

Region New York

Territorial ID

Tax ID 1234567890 Comp. 987654321

Phone numbers 123-456-7890

E-mail

Bank name

Account number

Logo

Register book number Registration authority cod

Register entry number

Treatment location ID

2.3. Configuring dictionaries

Configuration of dictionaries is available in [Settings > Dictionaries](#).

2.3.1. List of diagnoses, procedures and their categories

[List of diagnoses](#) dictionary allows you to create a list of diagnoses with a default description and category. The categories of diagnoses are mainly for informative purposes.

[List of procedures](#) dictionary allows you to create a list of procedures with a default description, division into categories, VAT rate, Saltes tax rate (applies to integrated fiscal printers), default price of the procedure, commission for the doctor and cost of materials for a given procedure. The categories of procedures are additionally defined by colors, which allows to visually distinguish

Each dictionary can be freely configured according to the needs of a given practice/clinic. In addition, in case of **General medicine**, separate dictionaries and categories of diagnoses and procedures can be created. Diagnoses and procedures can be added manually to the dictionary or imported from a predefined list which comes bundled with the SmartDental software.

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Software Configuration

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▲ Dictionaries

List of registration methods

List of procedures

List of diagnoses

List of prosthetic labs

List of documented services

List of suppliers

List of warehouse items

Fiscal printer

Label printer

Scanning

Documents numbering | VAT rates

Discount groups

Patient groups

E-mail account

Text message account

Documents editor

Network settings

Online schedule

Radiovisiography

Medical equipment

License

Update

+

List of procedures and categories

Export to XML

Import from XML

Import ICD9 procedures

List of procedure categories

Category name	Clinic type	Show in schedule	Color
Aesthetic dentistry	Dentistry	Yes	
Periodontology	Dentistry	Yes	
Orthodontics	Dentistry	Yes	
Dental surgery	Dentistry	Yes	
Prosthetics	Dentistry	Yes	
Endodontics	Dentistry	Yes	

List of procedures

Search

Category

Diagram position

Procedure name	ICD9	Diagram position	Description	Category name	VAT	Tax	Price	Commission 1	Commission 2
--- no procedure ---				General dentistry	N/A	E	\$0.00	\$0.00	
Acrylic prosthesis				Prosthetics	N/A	E	\$0.00	\$0.00	
Add the clamp to the prosthesis				Prosthetics	N/A	E	\$0.00	\$0.00	
Add tooth to prosthesis				Prosthetics	N/A	E	\$0.00	\$0.00	
Alveolar irrigation				Dental surgery	N/A	E	\$0.00	\$0.00	
Anesthesia		Anesthesia		General dentistry	N/A	E	\$0.00	\$0.00	
Big arch fixed appliance with 2 rings				Orthodontics	N/A	E	\$0.00	\$0.00	
Camera shot, 1 arc				Orthodontics	N/A	E	\$0.00	\$0.00	
Cofferdam				General dentistry	N/A	E	\$0.00	\$0.00	
Composite Onlay				Prosthetics	N/A	E	\$0.00	\$0.00	
Conductor anesthesia				General dentistry	N/A	E	\$0.00	\$0.00	
Control visit with a removable appliance				Orthodontics	N/A	E	\$0.00	\$0.00	

2.3.2. Transfer of diagnoses and procedures

It is possible to export and import a list of diagnoses and procedures. This feature allows you to transfer a previously created list from a demo database or another clinic.

The function is available in the list of diagnoses and procedures ([Import from XML](#), [Export to XML](#)).

2.3.3. Discount groups

This feature of the program allows you to assign patients to groups and provide them with a percentage discount from the employee and/or from the owner, differentiating into treatment categories (e.g. restorative, endodontics, prosthetics, etc.).

Software Configuration

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- Documents numbering | VAT rates
- Discount groups**
- Patient groups
- E-mail account
- Text message account
- Documents editor
- Network settings
- Online schedule
- Radiovisiography
- Medical equipment
- License
- Update

Discount groups

Group name	Category
Pro Bono	

Discount values per category of procedures

Treatment category	Owner discount	Employee discount
Aesthetic dentistry	100 + -	0 + -
Periodontology	100 + -	0 + -
Orthodontics	100 + -	0 + -
Dental surgery	100 + -	0 + -
Prosthetics	100 + -	0 + -
Endodontics	100 + -	0 + -
Dental prophylaxis	100 + -	0 + -
General dentistry	100 + -	0 + -
Restorative dentistry	100 + -	0 + -
Prosthetics Module	100 + -	0 + -

To assign patients to a given group:

- Create a discount group in [Settings > Discount groups](#);
- Assign a patient to a selected group when adding a new patient or editing an existing patient's data;
- A percentage discount for treatment from the employee and/or from the owner can be set to a given discount group, with a distinction between the treatment categories;

Membership in a given group is displayed in:

- [Patient Record > Patient Data](#)
- [List of patients](#)
- [List of scheduled patients](#)
- [Adding sales documents](#)
- [Adding a procedure during a visit with the possibility of assigning the discount to the price of the treatment](#)

Patients list									
Patients list									
Find patient <input type="text" value="Enter at least 3 characters"/> <input checked="" type="checkbox"/> Show all active <input type="checkbox"/> Show inactive Patient group <input type="text"/>									
No. ▾	Last name and first name	Personal ID no.	Address	City	Phone no.	Phone no. 2	Discount group	Patient group	
10	Jones Scarlett Grace	84120992345	567 Maple Street	Miami	9876543210	1234567890			
9	Brown Evelyn Charlotte	96022285647	456 Pine Lane	New York	9876543210	1234567890	pb		
8	Martinez Harper Elizabeth	87071064785	345 Main Street	Chicago	1234567890	9876543210			
7	Davis William Michael	92081754822	890 Oak Avenue	Los Angeles	9876543210	1234567890			
6	Smith Jackson James	88042973825	567 Pine Street	New York	1234567890	9876543210			
5	Robinson Sophia Grace	95111289401	234 Cherry Street	Miami	9876543210	1234567890			
4	Miller Liam Alexander	23234231	789 Oak Lane	Houston	1234567890	9876543210			
3	Smith Emma Madison	72010112857	142 Ash Lane	New York	48516853083	126453663			
2	Williams Ava Grace	90032567419	456 Maple Avenue	Chicago	1234567890	9876543210			
1	Johnson Oliver Daniel	85091557832	123 Elm Street	Los Angeles	9876543210	1234567890			

2.4. Additional configuration

2.4.1. Setting up doctors' work schedules (working hours)

The configuration is available in [Settings > Work schedule](#).

The configuration of the working hours of a given physician is required for the following features of the program to work:

- graphical representation of working hours in the schedule;
- one-day preview in the schedule for many doctors at the same time, where selected employees are displayed based on working hours;
- online scheduling (automatic generation of available dates);
- search for available free appointment slots;

In SmartDental, you can use your doctor's working hours based on the rules set in [Working Hours Rules](#). It is also possible to set a more precise [Working Hours Schedule](#). Whether SmartDental is to be based on a general [Working Hours Rule](#) or a detailed [Working Hours Schedule](#) can be set in [Settings > Interface Settings](#) under [Use exact work schedule instead of rules in when settings working hours](#).

Working Hours Rules

To fully configure your working hours, you may need to add several work schedule characteristics for a single doctor. The basis for determining the work schedule characteristics is the range of working hours of a doctor in a given week, month or part thereof.

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- E-mail account
- Text message account
- Documents editor
- Network settings
- Online schedule
- Radiovisiography
- Medical equipment
- License
- Update

Work schedule

Working hours rules

Employee

Employee	From	To	From	To	Days	Months
▶ Johnson Michael	2017-11-30	2030-11-30	08:00	14:00	Mo Tu Th	01 02 03 04 05 06 07 08 09 10 11 12
Johnson Michael	2017-11-30	2030-11-30	14:00	20:00	We Fr	01 02 03 04 05 06 07 08 09 10 11 12
Smith Emily	2017-11-30	2030-11-30	14:00	20:00	Mo Tu Th	01 02 03 04 05 06 07 08 09 10 11 12
Smith Emily	2017-11-30	2030-11-30	08:00	14:00	We Fr	01 02 03 04 05 06 07 08 09 10 11 12

Working hours schedule

Employee

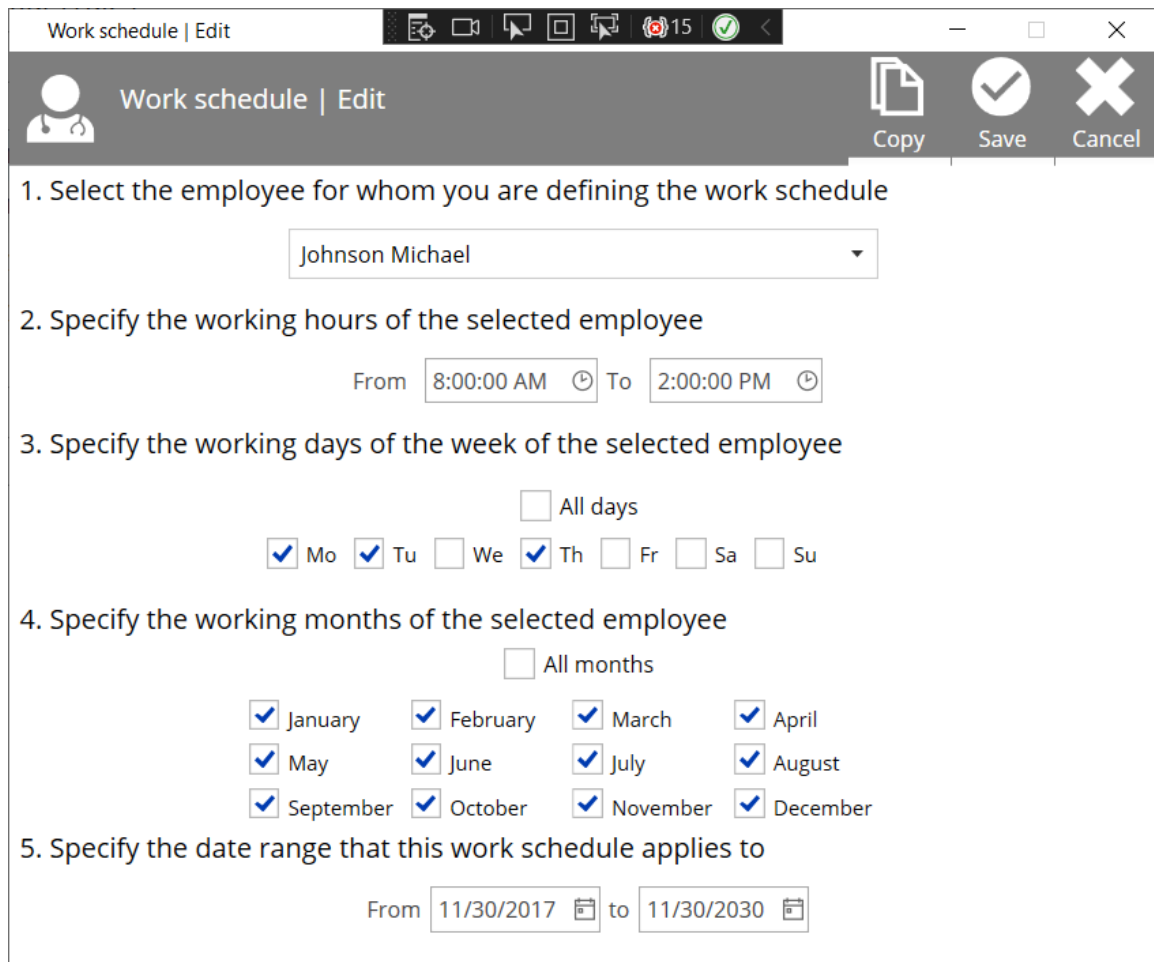
Employee	From
Employee	From

2.4.1.1 Example I

The doctor works several days a week from 9 a.m. to 3 p.m. and the other days from 3 p.m. to 8 p.m. Two work schedule characteristics should be created for this doctor.

1. Characteristics for 9:00 a.m. – 3:00 p.m.:
 - a. Hours: 9:00 a.m. – 3:00 p.m.
 - b. Determine the days of the week when the doctor works during these hours
 - c. Determine the months in which the doctor works during these hours
 - d. Specify the date range for which this characteristic applies
2. Characteristics for 3:00 p.m. – 8:00 p.m.:
 - a. Hours: 3:00 p.m. – 8:00 p.m.
 - b. Determine the days of the week when the doctor works during these hours
 - c. Determine the months in which the doctor works during these hours
 - d. Specify the date range for which this characteristic applies

REMARK! The date range for the characteristic must include the months that are included in a given characteristic.



Work schedule | Edit

1. Select the employee for whom you are defining the work schedule

Johnson Michael

2. Specify the working hours of the selected employee

From 8:00:00 AM To 2:00:00 PM

3. Specify the working days of the week of the selected employee

☐ All days

☒ Mo ☒ Tu ☐ We ☒ Th ☐ Fr ☐ Sa ☐ Su

4. Specify the working months of the selected employee

☐ All months

☒ January ☒ February ☒ March ☒ April
☒ May ☒ June ☒ July ☒ August
☒ September ☒ October ☒ November ☒ December

5. Specify the date range that this work schedule applies to

From 11/30/2017 to 11/30/2030

2.4.1.2 Example II

The doctor works several days a week from 9 a.m. to 3 p.m. and the other days from 3 p.m. to 8 p.m. However, this range of working hours and days is for the first and last week of a given month or months.

1. Characteristics for 9:00 a.m. – 3:00 p.m.:
 - a. Hours: 9:00 a.m. – 3:00 p.m.
 - b. Determine the days of the week when the doctor works during these hours
 - c. Specify only one month
 - d. Specify a date range that covers the first week of the month
2. Characteristics for 3:00 p.m. – 8:00 p.m.:
 - a. Hours: 3:00 p.m. – 8:00 p.m.
 - b. Determine the days of the week when the doctor works during these hours
 - c. Specify only one month
 - d. Specify a date range that includes the last week of the month

Such a characteristic must be repeated for each other month in which the doctor works only in particular weeks.

Schedule of working hours

Exact work schedule items can be generated automatically based on previously entered **Working Hours Rules**. To do this, select the selected rule and select **Generate working hours schedule** from the RIGHT-CLICK menu.

Once the days and hours on which the doctor works are generated, you can fine-tune the schedule by adding, editing, or deleting individual working days, which will allow you to set an irregular work schedule (e.g., removing holidays, vacations, or other exceptions to the work schedule).

2.4.2. List of registration methods

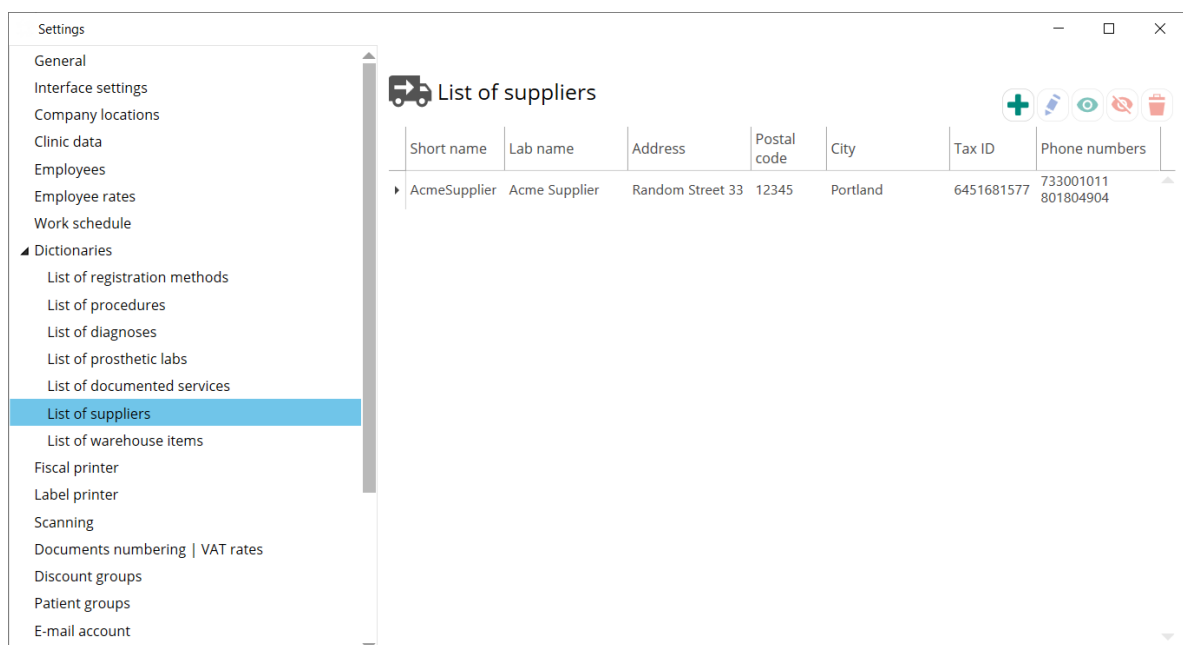
The configuration is available in **Settings > Dictionaries > List of registration methods**.

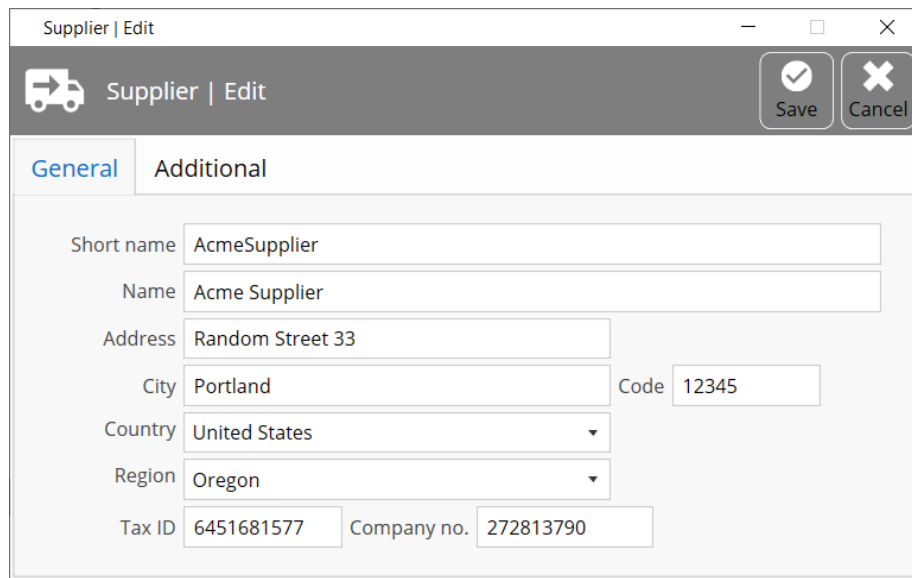
The method of registration is for informational and statistical purposes only. Registration methods are used when adding a new patient and indicate how the registration took place (online, by phone, on-site etc.).

2.4.3. List of suppliers

The configuration of suppliers is available in the **Settings > Dictionaries > List of suppliers** menu. The list is used when receiving items at the warehouse. This view provides a list of suppliers with the option to filter displayed data. From the list level, it is possible to add, edit, delete and activate/deactivate suppliers.

REMARK! If the goods have already been received from a given supplier, it is not possible to delete this supplier, but only to deactivate them reversibly. Deactivation means that the supplier is not displayed in the list of suppliers when items are received.





Supplier | Edit

Supplier | Edit

Save Cancel

General Additional

Short name AcmeSupplier

Name Acme Supplier

Address Random Street 33

City Portland Code 12345

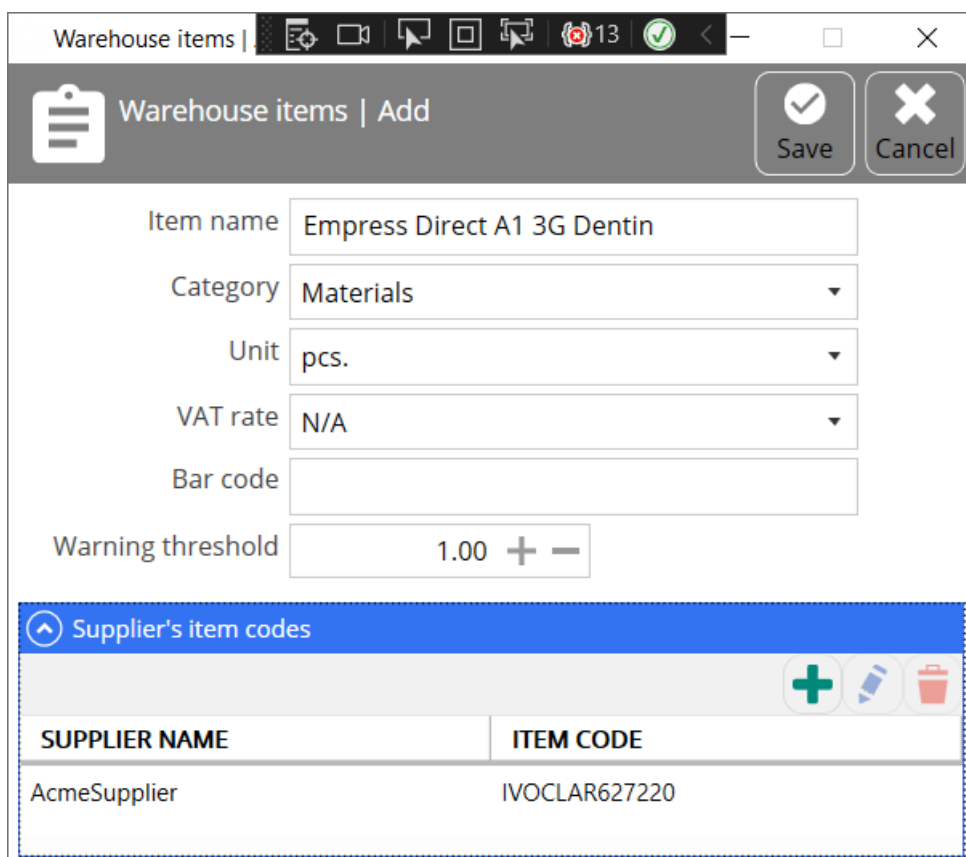
Country United States

Region Oregon

Tax ID 6451681577 Company no. 272813790

2.4.4. List of warehouse items

The configuration of the list of warehouse items is available from the [Settings > Dictionaries > List of warehouse items](#). The list of warehouse items is used in the warehouse module of the software (stock level, receiving, handing out items and generating orders). This view displays a list of warehouse items that are used in the dental office/clinic, with the ability to filter the displayed data. From the list level, it is possible to add, edit, delete and activate/deactivate a given warehouse item.



Warehouse items | Add

Warehouse items | Add

Save Cancel

Item name Empress Direct A1 3G Dentin

Category Materials

Unit pcs.

VAT rate N/A

Bar code

Warning threshold 1.00 + -

Supplier's item codes

SUPPLIER NAME	ITEM CODE
AcmeSupplier	IVOCLAR627220

Additional properties of the warehouse item:

Warning quantity	Means the quantity of goods below which a given warehouse item must be ordered from the supplier
Item Codes	For each warehouse item, you can set the commodity codes under which the item appears at the supplier. When ordering an item, the code for each item will be placed in the order printout, depending on which supplier it is ordered from

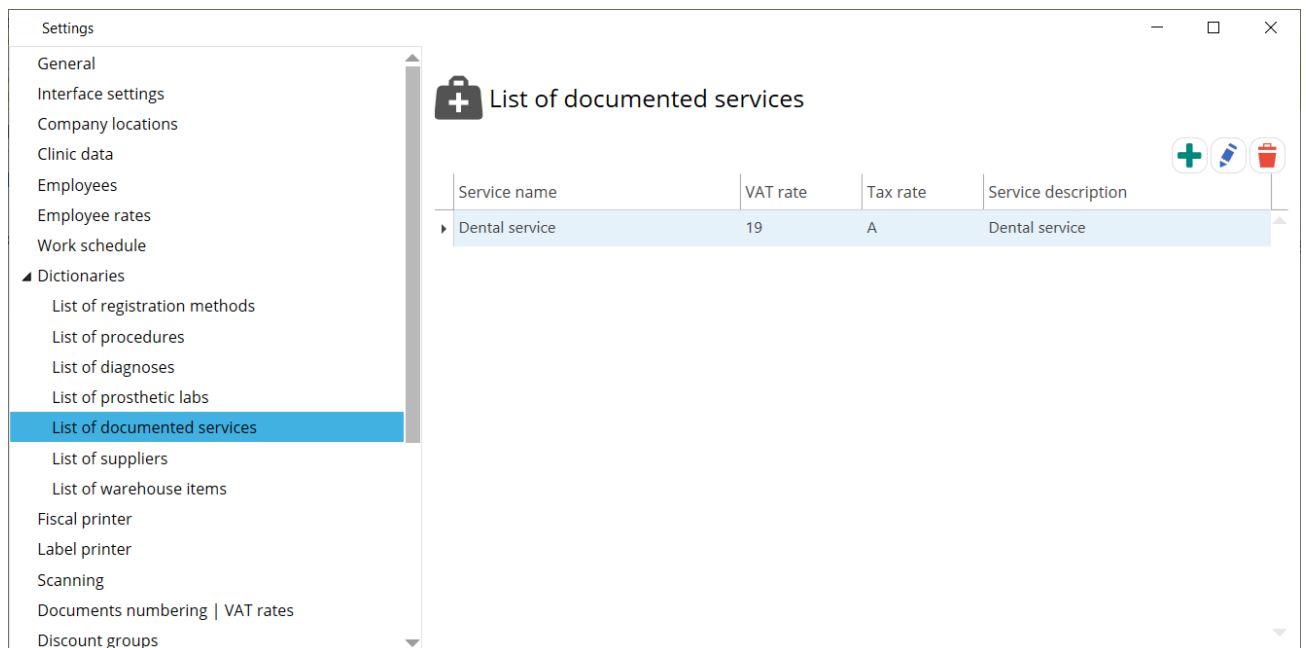
REMARK! If a warehouse item has already been received into the warehouse, it is not possible to delete it, but only to deactivate it reversibly. Deactivation means that the item is not displayed in the list of warehouse items.

2.4.5. List of documented services

The configuration is available in [Settings > Dictionaries > List of documented services](#) or directly from the level of [Patient card > Add payment > List of items on the document > Add from list](#).

It is a separate list of services used only when issuing sales documents, i.e.: Receipt, Cash Receipt, VAT Invoice, Bill.

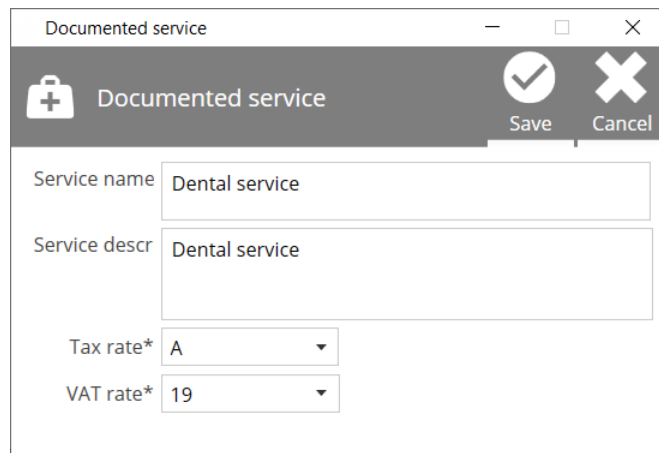
The list of documented services was created as a result of the use of different nomenclature by the owners of dental offices/clinics when issuing the above documents. When issuing sales documents for services rendered, general nomenclature (e.g. "Dental service") or specific nomenclature is used, where specific treatments performed by a doctor are entered in the document.



When adding a documented service, you must provide the following data:

- Service Name

- Select the Tax rate for the service (only when you use a fiscal printer)
- Select the VAT rate for the service
- In addition, you can add a description of the service



Documented service

Service name: Dental service

Service descr: Dental service

Tax rate*: A

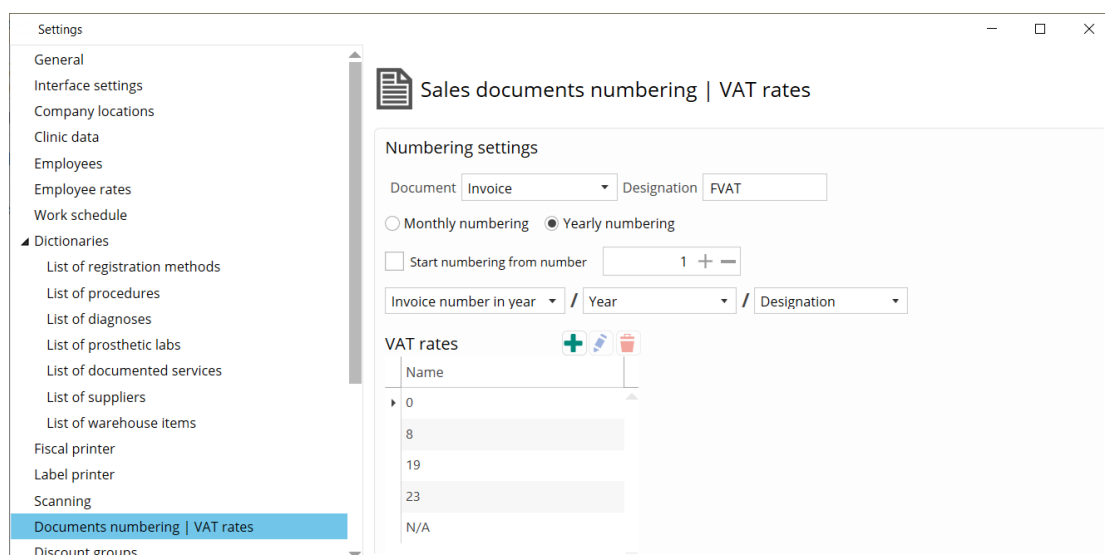
VAT rate*: 19

Save Cancel

INFORMATION The Tax rate can be selected only when you use SmartDental along with a fiscal printer. Tax rates are denominated with letters (A, B, C, D, G). Information about the VAT value assigned to a given Tax rate should be obtained from the company that performed the fiscalization or such a list should be printed, in accordance with the procedure found in the user manual of a given fiscal printer.

2.4.6. Set up numbering for sales documents

The configuration of sales document numbering is available in [Document numbering | VAT rates > Numbering settings](#). It allows you to customize the numbering format of cash receipts, bills and VAT invoices to a wide extent.



Settings

General

Interface settings

Company locations

Clinic data

Employees

Employee rates

Work schedule

▲ Dictionaries

List of registration methods

List of procedures

List of diagnoses

List of prosthetic labs

List of documented services

List of suppliers

List of warehouse items

Fiscal printer

Label printer

Scanning

Documents numbering | VAT rates

Discount groups

Sales documents numbering | VAT rates

Numbering settings

Document: Invoice Designation: FVAT

☐ Monthly numbering ☒ Yearly numbering

☐ Start numbering from number: 1

Invoice number in year / Year / Designation

VAT rates

Name	Value
0	
8	
19	
23	
N/A	

2.4.7. Setting up SMS notifications

SmartDental software allows you to send notifications about an upcoming appointment (Main window > Scheduled appointments) and to send SMS messages of any content to any selected list of patients (SMS campaigns - Main window > Texting).

The program can use a commercial SMS gateway (www.gsmservice.pl, tidesoftware.pl, www.smsapi.pl) or [an Android phone](#).

2.4.7.1 Creating an account on gsmervice.pl

- Open the gsmervice.pl registration page (<http://gsmervice.pl/register.php>) and follow the instructions on the website.
- After activating your account, log in to the website and click on [the SMS Gateway](#) in the top menu and follow the instructions in order to activate the SMS gateway.
- Once you have completed the above steps, you will need to go to the <http://bramka.gsmervice.pl/aktywacja-api> page to activate API access for SmartDental.
 - In the API Standard field, leave "HTTP API" and "SOAP API" checked;
 - The "Allowed IP" and "Callback" fields should be left blank;
- In [the Settings > Edit Message Senders menu](#), you can set the sender of the message (text or phone number).

The data provided during the activation of access via API, i.e. login, password and sender of the message, will be used to configure SMS notifications in the SmartDental program.

2.4.7.2 Setting up your Android phone

For this feature to work properly, you need an Android phone connected to your Gmail account, a local WiFi network, and the free myMobKit app installed and configured. When sending or receiving notifications, the phone should be unlocked.

The cost of SMS is in accordance with the current price list of the operator (contract).

In the myMobKit application, select the [> Service > Start/stop control panel in the Control Panel](#). In the URL part, you will see the IP address of the service along with the port number.

Service

Start/stop control panel

Check this to start control panel



URL

<http://192.168.1.100:1688>

Then, in the Security section, click [Security > Configure security settings](#) and change the default login ([Login user name](#)) and password ([Login user password](#)).

Login user name

admin

Login user password

password123

The above settings must be entered in the SMS settings of the SmartDental software.

2.4.7.3 Configure notifications in the program

Configuration of SMS notifications in SmartDental is possible in **Settings > Text message account**.

After filling in the data obtained from the gsm.service.pl, tideplatform.com, smsapi.pl or entering the data from the myMobyKit application from the Android phone and setting the content of the message, press **Check settings**, then select **Use** or **Use Android gateway** and press **Save**.

The **Status** section informs you about the current status of your configuration.

Text message server settings

Connection parameters | Internet gateway

Operator: gsm.service.pl
Login:
Password:
Customer ID:
Sender:
Text message type: Traditional
Encoding: GSM-7
Traditional text message price: \$0.00
Economical text message price: \$0.00
Check settings Save

Android Gateway (myMobKit) 1 | Connection settings

Operator: myMobKit
IP address: 19.168.1.100
Port: 1688
Login: admin
Password:
Delay between text messages (ms): 2,000
Check settings Save

Android Gateway (myMobKit) 1 and commercial gateway | Message settings

Put the following tags in the text message content: @ClinicName#, @ClinicNameCtd#, @Address#, @Phone# to add the indicated data.
Put the tag: @Doctor# in the text message to add the indicated employee data.
Put the tag: @Title# in the text message to add the employee's title.
Put the tag: @Patient# in the text message to add the patient's last name and first name.
Put the tag: @PUBLIC# in the text of the message to add the text PUBLIC APPOINTMENT or PRIVATE APPOINTMENT.

Default message

Beginning of the message:

2.4.8. Setting up a connection to imaging software (radiovisiography)

SmartDental is integrated with dedicated software for digital imaging devices from Durr Dental, Planmeca, Kodak, Gendex, MyRay RageMage, MyRay Iris, Gendex VixWin, Carestream, Cygnus Media, VATECH EzDent-i, Sopro Dental Imaging System, Instrumentarium CliniView and Sirona Sidexis. Thanks to the integration, there is no need to open the dedicated software separately. Depending on the type of dedicated radiovisiography software, the program launches it and creates or updates and opens the patient's medical record.

For proper operation, it is necessary to install specific dedicated software (provided with the purchase of a digital imaging device) and configure it correctly, depending on the type of practice infrastructure.

Then, in the SmartDental software, in **Settings > Radiovisiography**, set the appropriate access paths to the rvg software and activate the **Use** button.

SmartDental gives you the ability to use software dedicated to several devices from different companies at the same time.

Settings

- General
- Interface settings
- Company locations
- Clinic data
- Employees
- Employee rates
- Work schedule
- Dictionaries
- Fiscal printer
- Label printer
- Scanning
- Documents numbering | VAT rates
- Discount groups
- Patient groups
- E-mail account
- Text message account
- Documents editor
- Network settings
- Online schedule
- Radiovisiography**
- Medical equipment
- License
- Update

Radiovisiography settings

DurrDental VistaSoft

Application path: C:\Program Files\Duerr\VistaSoft\Clients\VistaSoft.exe

Data transfer file: C:\ProgramData\Duerr\VistaSoft\WorkstationService\Examination\DBSWINLegacySupport\patimport.txt

☒ Use Personal ID instead of record number

Use ☐

DurrDental DBSWin

Application path: C:\Program Files (x86)\Duerr\DBSWIN\bin\DBSWIN.exe

Data transfer file: C:\ProgramData\Duerr\temp\patimport.txt

Use ☐

Planmeca Romexis

Application path: C:\Program Files\Planmeca\Romexis

Use ☐

Planmeca Romexis6

Application path: C:\Program Files\Planmeca\Romexis

☐ Use Personal ID instead of record number

Use ☐

MyRay Iris

Application path: C:\NNT\NNTBridge.exe

Use ☐

2.4.8.1 Configuration and description of integration with DurrDental, VistaSoft and DBSWin

Requirements

DurrDental VistaSoft, when called from SmartDental, receives the patient's data along with the patient card number. DurrDental VistaSoft only takes into account the medical card number in order to recognize the patient.

Therefore, the integration between DurrDental VistaSoft and SmartDental works correctly when the DurrDental VistaSoft patient database is empty and each time a new patient is created DurrDental VistaSoft is called from the SmartDental level.

Remark!!!

When the DurrDental VistaSoft database already contains patients at the start of the integration, it is required to import all patients from DurrDental VistaSoft to SmartDental, before entering subsequent patients into the SmartDental software. This should be done by the reseller or manufacturer of the SmartDental software.

Configuration

In order to configure the integration correctly, in [Settings > Radiovisiography > DurrDental VistaSoft](#), set the path to the [DBSWIN.exe](#) (default is [C:\Program Files \(x86\)\Duerr\DBSWIN\bin\DBSWIN.exe](#)) or [VistaSoft.exe](#) (default is [C:\Program Files\Duerr\VistaSoft\Clients\VistaSoft.exe](#)) and the path to the [patimport.txt](#) file (default [C:\ProgramData\Duerr\temp\patimport.txt](#) or [C:\ProgramData\Duerr\VistaSoft\WorkstationService\Examination\DBSWINLegacySupport\patimport.txt](#)).

2.4.8.2 Configuration and description of integration with MyRay Iris

Description of operation

Integration of MyRay Iris with SmartDental is possible even if the MyRay Iris database previously contained a list of patients. Before calling the patient in MyRay Iris, SmartDental checks if the patient with the given data exists in the MyRay Iris and displays a message asking you to verify that it is the same patient. Once the patient has been verified, SmartDental will create an association and the next time the patient is from opened SmartDental in MyRay Iris without an additional message.

Configuration

In order to configure the integration correctly, in [the Settings > Radiovisiography > MyRay Iris](#), set the path to the [NNTBridge.exe](#) (default is [C:\NNT\NNTBridge.exe](#)) and the path to the database (default is [C:\NNT\Shared\SFPA\PatDocDB.mdb](#) by default).

2.4.8.3 Configuration and description of integration with Gendex VixWin

Description of operation

By default, Gendex VixWin is set to work on its own database, which is located in the **VXDATA** folder specified in Gendex VixWin under **Options > Preferences > Image Database Drive**.

In order to properly integrate with SmartDental, in Gendex VixWin **Gendex VixWin > Options > Preferences > Work system** set to **External database**. This setting will create a **VXIMAGES** directory on the drive specified in **Gendex VixWin > Options > Preferences > Image File Database Drive**. Next, copy the contents of the **VXDATA** directory to **VXIMAGES**, which will give you access to the patients you have already added and the images in **Gendex VixWin**. From now on, it will only be possible to run **Gendex VixWin** using the SmartDental software.

Configuration

In order to configure the integration correctly in SmartDental, in **Settings > Radiovisiography > Gendex VixWin**, set the path to the **vixwin.exe** file (default is **C:\vixwin\vixwin.exe**) and the path to the external database to **Y:\VXIMAGES**, where **Y** is the drive indicated in Gendex VixWin **Options > Preferences > Image Database Drive**.

Remark!!!

Gendex VixWin does not create a new patient in its own database when calling a patient from SmartDental, but only adds images with an identifier that is the patient's card number in SmartDental. Therefore, if you stop using the SmartDental integration, you will need to populate the database in VixWin.

2.4.8.4 Configuration and description of integration with MyRay RayMage

Requirements

When MyRay RayMage is called from the SmartDental level, it receives the patient's data along with the patient medical card number from the SmartDental software. MyRay RayMage only takes into account the card number in order to recognize the patient.

Therefore, the Integration between MyRay RayMage and SmartDental workes correctly when the MyRay RayMage patient database is empty. Subsequently, each time a new patient is created, MyRay RayMage should be called from the SmartDental software.

Remark!!!

When the MyRay RayMage database already contains patients at the start of the integration, it is required to import all patients from the MyRay RayMage software into SmartDental, before adding new patients to SmartDental. This should be done by the reseller or manufacturer of the SmartDental software.

Configuration

In order to configure the integration correctly, in [Settings > Radiovisiography > myRay RayMage](#), set the path to the [rayMage.exe](#) (default is [C:\Program Files \(x86\)\MyRay\rayMage\rayMage.exe](#)).

2.4.9. Saving and loading settings files

The part of the program settings, common to the entire installation, is saved in the database, which allows them to be saved in the case of new installations that are connected to a given database. Some of the settings that apply to a given computer in the installation are saved on the computer.

Once you have set up the software on your computer, it is recommended that you save the settings file. Saving the file makes reconfiguration much faster if you reinstall Windows or want to set up the program on another computer. After the software update, the settings are retained from the previous version.

Saving and loading the configuration file is available in [Settings > General](#).

2.4.10. Training mode

At the beginning of using the SmartDental software, it is possible to turn on [the Training Mode option](#), which allows you to delete incorrectly entered appointments without providing additional annotations.

[Training mode](#) applies to all employees and can only be set by a user with the [Administration | Software configuration](#) permissions.

In training mode, when deleting an appointment they are actually deleted from the database, not just crossed out with a note on who made the change.

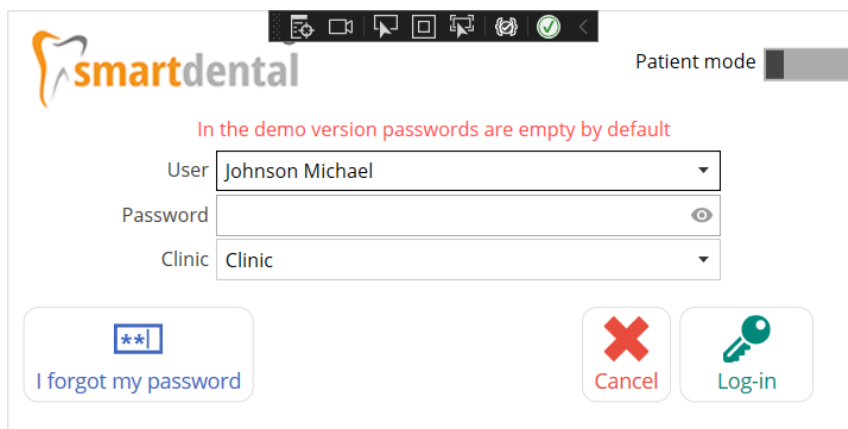
In training mode, appointments can only be edited or deleted by the employee who entered them.

3. Software usage

3.1. Logging in, switching users, and closing the software

3.1.1. Login

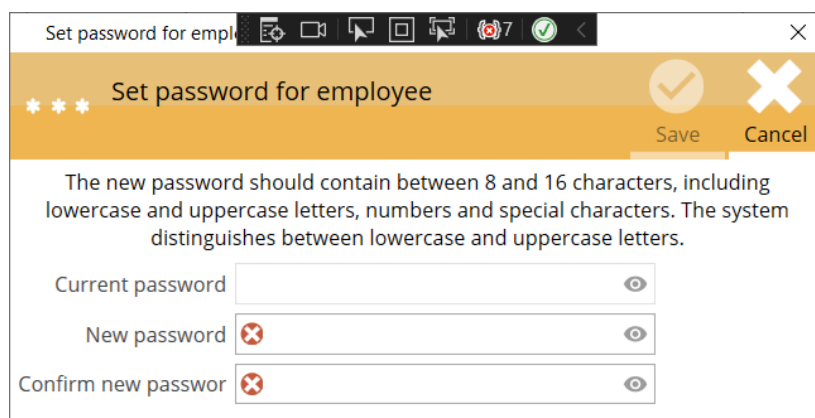
Every time the SmartDental software is launched, an employee must log in. To do this, please select an employee, enter a password and select/change the Clinic if necessary.

The image shows the SmartDental login window. At the top left is the SmartDental logo. To the right of the logo is a toolbar with several icons. Further right is a 'Patient mode' toggle switch. Below the logo, a red text message states: 'In the demo version passwords are empty by default'. The login form consists of three fields: 'User' with a dropdown menu showing 'Johnson Michael', 'Password' with a text input field and an eye icon, and 'Clinic' with a dropdown menu showing 'Clinic'. At the bottom left is a button labeled 'I forgot my password' with a password icon. At the bottom right are two buttons: 'Cancel' with a red X icon and 'Log-in' with a green key icon.

I forgot my password

If an employee forgets their password, a new password can be sent to the e-mail address assigned to the employee. If no such address has been assigned, the password will be sent to the primary e-mail address of the clinic provided during the activation of the software.

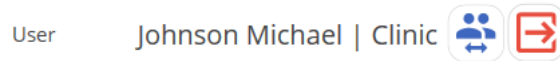
After receiving the password, the employee should log in and set their own password in the [Main Window > System > Change password](#)

The image shows a dialog box titled 'Set password for employee'. The title bar includes the text 'Set password for empl' and a close button. The dialog has a yellow header bar with three asterisks '***' on the left, a checkmark icon and a close button on the right, and 'Save' and 'Cancel' buttons. Below the header, a text message states: 'The new password should contain between 8 and 16 characters, including lowercase and uppercase letters, numbers and special characters. The system distinguishes between lowercase and uppercase letters.' There are three input fields: 'Current password', 'New password', and 'Confirm new password'. Each field has an eye icon to the right. The 'New password' and 'Confirm new password' fields have a red X icon to the left of the input field.

If a user has appropriate permissions, the password can be changed by going to [Settings > Employees](#), selecting an employee, clicking Edit and then [Password: Set](#).

3.1.2. Switching users

It is possible to switch between users without closing the software: **System > Switch user** or by using the blue button located in the middle of the main program window:



3.1.3. Closing the software

The software can be closed by going to **System > Close program** or by clicking the cross located in the upper right corner of the main program.

3.1.4. Protecting unsaved data

When you switch users or close the program, you will see a message about unsaved work (for example an unsaved appointment). Only after viewing and closing these windows will you be able to switch the user or close the program.

3.2. Registering a patient for an appointment

To register a patient for an appointment:

- 1) Open the Schedule window using the Schedule **Main Window > Schedule** quick access button;
- 2) In the schedule window, select the desired time slot for the appointment. To do this, you can left-click on the point corresponding to the start of the visit, and then, while still pressing the left-click, drag the cursor down or up, marking the time allotted for the appointment (e.g. 1.5 hours).
- 3) Once you have selected an appointment time slot, place the cursor over the selection area and then RIGHT-CLICK on it. In the context menu that appears, select the **New appointment** option:

Appointments schedule

February 2024 March 2024 February 5 - 9, 2024

Mo Tu We Th Fr Sa Su Mo Tu We Th Fr Sa Su

29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Clinic All Employee Johnson Michael

View Date Display 10 + - From 2/8/2024

Day 5-days 7-days

MONDAY, 5 TUESDAY, 6 WEDNESDAY, 7

Johnson Michael Johnson Michael Johnson Michael

7 07 30 08 30 09 30 10 30 11 30 12 PM 13

New appointment
New event
Paste appointment

A new appointment window will be displayed:

Appointment | Add

Appointment | Add Save Cancel

Employee Johnson Michael

Clinic Clinic

Appointment date 2/6/2024 4:00 PM - 5:45 PM

Patient

Patient data
(address, birthday)

Appointment type Aesthetic dentistry

Additional information


☐ Public appointment ☐ Add to waiting list

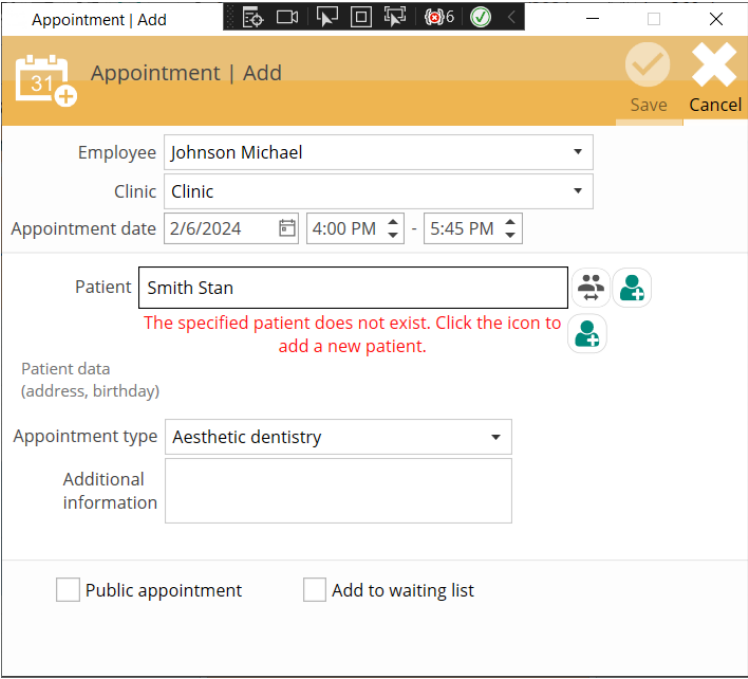
Available fields:

Software Usage

- **Employee** who will treat the patient. An employee should first be set up as described in [Configuration of doctors and other employees](#). The currently logged in employee or the one who is treating patients on the selected day is automatically selected. If the schedule view is set to **All employees** and **7 days**, please select the employee.
- **The date** of the appointment with the time range matching the one selected in the schedule window.
- **The patient** to whom the registration relates.
- **The type of appointment** to be made. For your convenience, individual types of appointments (endodontics, prosthetics, etc.) are marked in the schedule with different colors. Types of visits and colors can be configured in the software settings.
- **A description of the appointment** (optional), which will be visible in the schedule in the form of * and after hovering the mouse cursor over the appointment, when editing the appointment and in the list of appointments.
- **Public appointment:** If the appointment is to be reimbursed by the public health service.
- **Add to waiting list:** If this appointment is to be added to the waiting list.

Features:

- When the window opens, you can immediately type the first letters of the patient's name and then select the patient from the list of the displayed patients. If the list is empty, enter the patient's last name and first name. The software will display an option to allow you to quickly add a new patient to the database.
- Press the  button and select a patient from the list, where you can additionally use a filter. If the patient is not on the list, add him/her.



Appointment | Add

Employee Johnson Michael

Clinic Clinic

Appointment date 2/6/2024 4:00 PM - 5:45 PM

Patient Smith Stan

The specified patient does not exist. Click the icon to add a new patient.

Patient data (address, birthday)

Appointment type Aesthetic dentistry

Additional information

☐ Public appointment ☐ Add to waiting list

Software Configuration

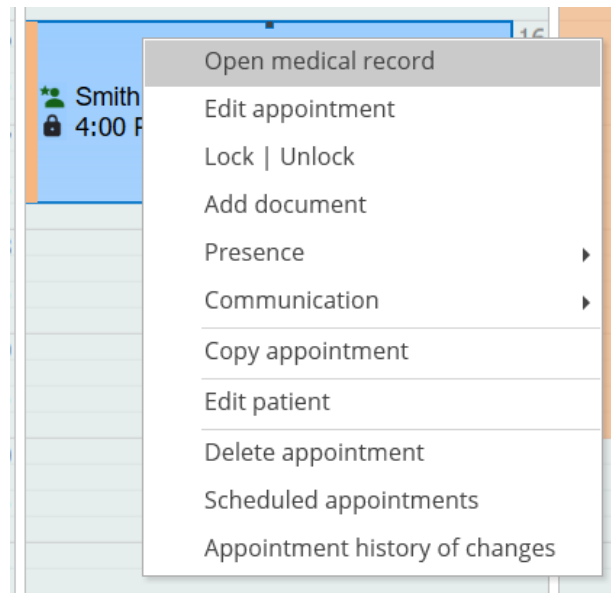
Once you have entered the above details, you should save your appointment. An appropriate entry will appear in the schedule, as shown in the figure below. When you left-click on the appointment, additional information is displayed (appointment type, date, time range, description). When you save a new appointment, it is automatically locked, protecting you from accidentally moving it around in the schedule. Locking/unlocking an appointment and other options are available in the context menu when you RIGHT-CLICK on the appointment.

	MONDAY, 5	TUESDAY, 6	WEDNESDAY, 7
	Johnson Michael	Johnson Michael	Johnson Michael
	30	30	30
1	13	13	13
	30	30	30
2	14	14	14
	30	30	30
3	15	15	15
	30	30	30
4	16	16	16
	30	30	30
5	17	17	17
	30	30	30
6	18	18	18
	30	30	30
7	19	19	19
	30	30	30
8	20	20	20
	30	30	30

Smith Jackson James
4:00 PM-5:45 PM

3.3. Admitting patients (conducting the appointment)

To admit a patient, you need to open their medical card (EHR). This can be done from the appointment schedule by either double LEFT-CLICK-ing on the appointment or RIGHT-CLICKing on the appointment and selecting **Open medical record** from the context menu:



It is also possible to open the patient's medical record from the level of:

- patients lists;
- scheduled appointments;
- quick patient search in the main program window;

3.3.1. Patient's medical card - general description

The appearance of the patient card may vary depending on:

- type of clinic (dentistry, general medicine)
- interface settings
- purchased modules

Smith Jackson James | Patient card 6 | Tel.: 1234567890 | Employee: Johnson Michael

Patient card | 6

Smith Jackson James

Personal ID no.: 88042973825 | Age: 35y,10m

All procedures: 100.00
All payments: 0
Balance: -100.00

Appointment history | Treatment plans | Treatment overview | Medical history | Services | Prosthetics | Images 1 | Documents 0 | Finances | Reminders 0 | Statistics | Text messages

Appointment history

Employee

2024-02-06 13:47-13:48
Johnson Michael

Diagram preview

Diagram description

Employee data

Dental Clinic of John Smith | 10001 New York, 123 Elm Street | Tax ID: 1234567890 | Company no.: 987654321
DDS Johnson Michael | License no.: 1234567

Modifications

Diagnoses

No data

Procedures

Location	Code	Procedure name	Price	Employee discount	Owner discount	Charge
		Glassionomer filling	\$100.00	0.00%	0.00%	\$100.00

Prosthetic works

No data

The patient chart contains the following tabs:

- Appointment history
- Treatment plans
- Treatment overview
- Medical history
- Services
- Prosthetics
- Images
- Documents
- Finances
- Reminders
- Statistics
- Text messages

3.3.1.1 Patient card - Appointment history

The appointment history includes all appointments for a given patient. Each appointment contains:

- dental diagram (in the case of a dental office)
- diagnoses under private treatment
- treatments under private treatment
- ICD10 diagnoses under public treatment

- ICD9 treatments under public treatment
- completed prosthetic works (in the case of a dental office)
- prescribed medications
- used sterilization packets

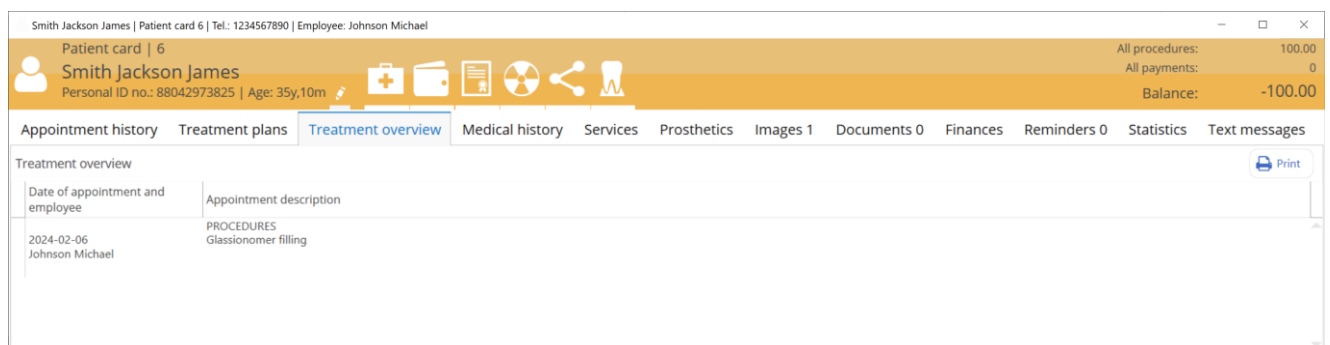
Therefore a graphical (diagram) and a written record of the history of treatment performed on a given patient during a given visit is available at any time. The diagram and description of each appointment can be converted to PDF and printed.

From this window, two printouts are available:

- Appointment history
- Patient medical card

3.3.1.2 Treatment overview

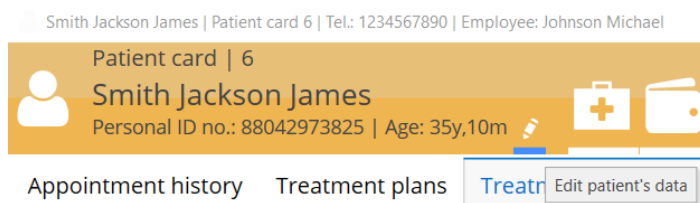
Displays a chronological overview of a patient's treatment. The treatment overview can be converted to PDF and printed.



3.3.1.3 Medical card - Patient data

From the level of the patient medical card, as well as in many other areas of SmartDental, direct access to view/edit patient data is possible.

In the patient's card, the edit button is located next to the patient's first name and last name:



Patient | Edit

Save Exit

Basic Data Important information Authorized persons Company data Other

Last name: Smith
 First name: Jackson
 Second name: James
 Personal ID no.: 88042973825
 Gender: Male
 Date of birth: 4/29/1988
 Tax ID:
 Street: 567 Pine Street
 Postal code: 10005 City: New York
 Country: United States
 Region: New York
 Cell no.: 1234567890 Info:
 Other no.: 9876543210 Info:
 E-mail: jackson.smith@example.com

Reason for entry: Routine checkup
 Discount group:
 Patient group:
 Registration meth:
 Registration date: 8/12/2021
☐ Panoramic x-ray photo
☐ CBCT image
☐ Cephalometric image

Card no.: 6 Designation:

3.3.1.4 Patient card – Medical history

Displays data from the current (recent) medical and/or medical history interview.

Adding medical history (medical interview) is described in chapter

[Electronic documentation and digital signature.](#)

3.3.1.5 Patient card - Prosthetics

Prosthetic treatment is described in chapter [Prosthetics](#)

3.3.1.6 Patient Card - Finances

Finances are described in chapter [Patient billing](#)



3.3.1.7 Patient card - Images

If the office has radiovisiography, the recommended place to store the images is the dedicated radiovisiography software (e.g. Romexis, VixWin, etc.). Such storage of images ensures that all medical data embedded in the images is preserved. This is especially true for DICOM images.

The **Images** tab allows you to add additional images to the patient's card if the clinic does not have radiovisiography. SmartDental supports both "regular" image file types (jpg, png, gif, etc.) and DICOM files (rvg and rvt) acquired via RVG cameras from Kodak, Gendex, etc. In this tab it is also possible to acquire images from a scanner.

Remark!!! Please note that DICOM images, when added to the Images tab, lose characteristic medical data and can only be used as auxiliary photos. The original files should be retained.



When you add an image, the following window appears:

To add an image from a file, press the Open file button  and select the file on your computer or on a portable medium (pendrive, cd/dvd, etc.). To scan an image, press the Scan button .

Each image can be described by adding information about the teeth it pertains to, the type of image, as well as a short verbal description. To save the image, press the **Save** button.

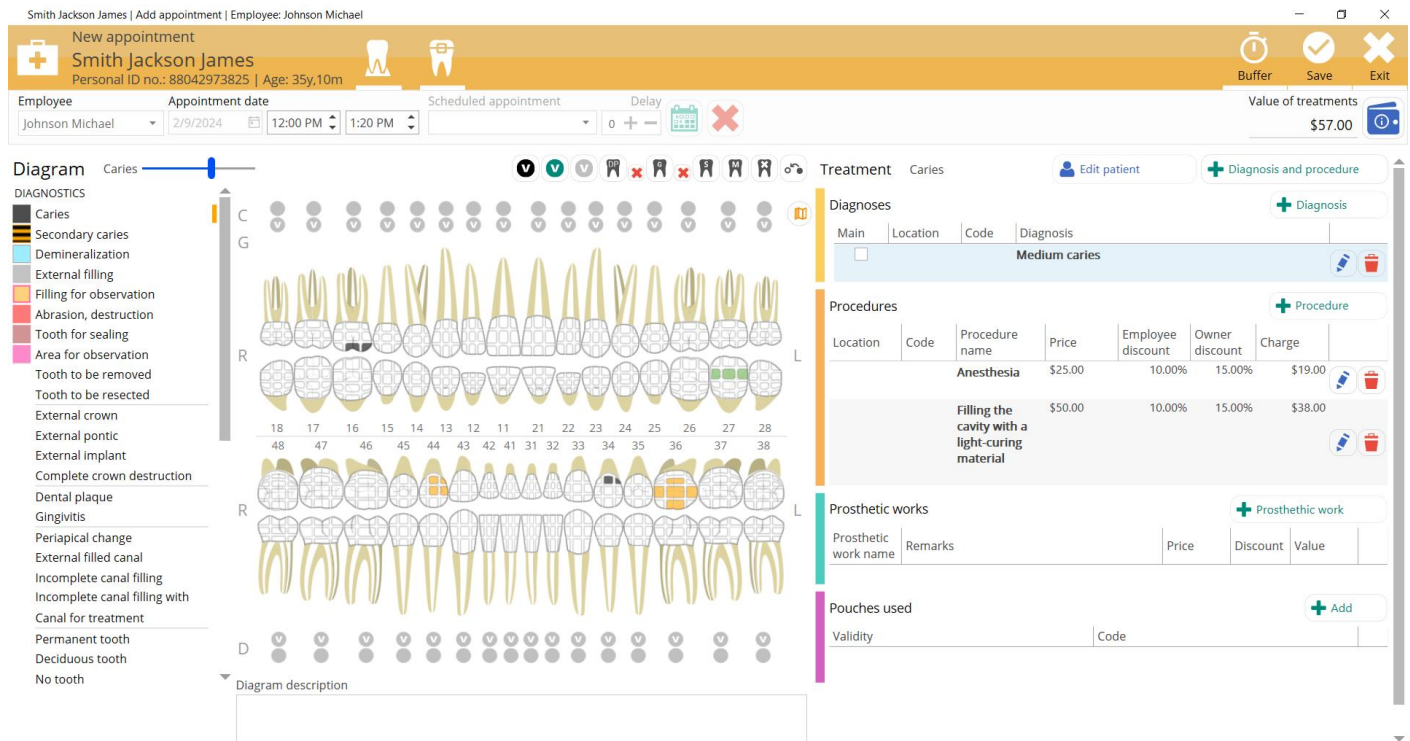
3.3.2. New appointment

To add a new appointment for a given patient, select one of the options:

- In the Patient Card view, press the  button
- in the **Appointment history** tab of the Patient Card view, press the  button
- in the **Appointment history** tab of the Patient Card view, right click and then click **Schedule View**, after selecting a time slot, right click and then click **Add appointment**.

This will bring up a new appointment window for that patient. The appearance of this window may vary depending on:

- type of logged office (dentistry, general medicine) - see [Błąd! Nie można odnaleźć źródła odwołania.](#)
- interface settings
- purchased modules



3.3.2.1 Edit a diagram

A dental diagram is used to graphically represent the current condition of the dentition. The data in the diagram is incremental, displaying information collected from previous appointments. This allows you to keep track of what changes have occurred as treatment progresses.

Each time a new appointment is added, you can check the current condition of patient's teeth and capture any changes that have occurred during the appointment. To do this, select the appropriate item from the scroll list on the left-hand side of the diagram.

Then hover the mouse cursor over the appropriate tooth and left-click on the area where you want to mark the given item. SmartDental provides you with areas of the diagram can be marked with a given item on a given tooth. The software does not provides those areas when the selection applies to the entire surface of the tooth or is unambiguous (for example when marking a missing tooth).

If you want to indicate that the tooth needs to be removed or resected, you can use markers which are placed near the tips of the tooth roots (round markers). Click the markers until you get the desired marking.

Markers placed closer to the apical area (circle with the letter V) are used to indicate the vitality of the tooth:








- Black means a dead tooth
- Green color tooth alive


Markers farther away from the vertex region (filled circle) are used as follows:

- Red with a cross indicates a tooth to be removed
- Red with a horizontal line indicates a tooth (root) to be resected




Above the diagram, on the right, there are additional tools that are used to mark all teeth:

- Scale the diagram
-  Vitality test marking (negative, positive, no test done)
-  Plaque with the option to cancel
-  Gingivitis with the option to cancel
-  Marks all teeth as permanent
-  Marks all teeth as deciduous
-  Marks all teeth as missing
-  Undoes all changes made during a given appointment

In the upper-right corner of the diagram, there is a button for a legend  which explains how to use diagram markings.

3.3.2.2 Adding, editing, and deleting diagnoses and procedures

Next to the diagram, depending on the activated modules, there are tables devoted to diagnoses, procedures, prosthetic works and sterilization packages.

To add an entry to a given table, press . Edit and delete buttons appear when entries are added to a given table.

Adding diagnoses and procedures is based on a similar scheme, except that in the window of adding procedures you can additionally set the cost of the procedure and possible discounts (in percentages). The default discount values will also be provided if they have been configured in [discount groups](#).

Procedure:

Search

- Provide at least the first 3 letters of the diagnosis or procedure name
- If the diagnosis or procedure you are looking for is on the drop-down list, select it, then indicate on the mini diagram which teeth it applies to and save
- If no procedure or diagnosis is found in the dictionary, you can enter its full name and then select either [Use once](#) or [Add to dictionary](#).
 - a. Use once option allows you to save a diagnosis or procedure without adding it to the dictionary (e.g. if you believe that such an entry is only needed once)
 - b. Adding to the dictionary will allow you to find a given diagnosis or procedure in the future and select it in the search field

Selection from the list

By selecting the [Show all control](#), we can choose from a list of one (double-click LMB) or multiple (press Ctrl + select LMB) solutions or procedures. In this scheme, it is also possible to search for a diagnosis or procedure based on the available filters. Due to the fact that the selection from the list can apply to many items, at this stage it is possible to add a description only if you have selected one item from the list (double-click on the left-click). Otherwise, you can add a description by editing the items added to the table.

Diagnosis | Add

Diagnosis | Add

Multiply Copy Save Cancel

Permanent	Quadrant I								Quadrant II								Clear
	18	17	16	15	14	13	12	11	21	22	23	24	25	26	27	28	
Deciduous	Quadrant IV								Quadrant III								
	48	47	46	45	44	43	42	41	31	32	33	34	35	36	37	38	

Show all

If the entered diagnosis does not exist on the list - add it to the dictionary or use it once.

Diagnosis ☒ Use once ☒ Add to dictionary







Caries

- Circular caries
- Deep caries
- Medium caries
- Secondary caries
- Superficial caries





When adding a diagnosis or procedure, you can use **Copy** instead of **Save**. This results in subsequent entries for a given diagnosis or procedure getting added to the table of diagnoses or procedures.

After completing the above steps, the entries in the patient's appointment window should look like this:

Diagnoses + Diagnosis

Main	Location	Code	Diagnosis	
<input type="checkbox"/>			Medium caries	 
<input type="checkbox"/>			Deep caries	 
<input type="checkbox"/>			Deep caries	 

Procedures + Procedure

Location	Code	Procedure name	Price	Employee discount	Owner discount	Charge	
		Anesthesia	\$25.00	10.00%	15.00%	\$19.00	 
		Filling the cavity with a light-curing material	\$50.00	10.00%	15.00%	\$38.00	 

3.3.2.3 Handing over prosthetic works

Handing over the prosthetic work is understood as giving the patient a removable prosthetic work or cementing a fixed prosthesis during a given appointment. The value of the work will be added to the total value of treatments during a given appointment.

To add an entry to the **Prosthetic works** table, press . Delete buttons appear when you add entries to this table.

In order for a given work to be available for handing over, it must first be planned and added to the list of orders for prosthetic laboratories. Preparation of the prosthetic work for submission is described in the chapter [Prosthetics](#).

3.3.2.4 New appointment – Permanent save

Once you have entered all the items into the appointment and made changes to the diagram, you can save this new appointment using the **Save** button located in the upper right corner of the **Add Appointment window**.

After saving an appointment it will be visible in the **Appointment history** section of the **Patient card**. To print out the information about an appointment, please click on the **Appointment card** located in the upper right section of the **Patient card** window.

3.3.2.5 New appointment – Saving to buffer

If you have not entered all the information about the appointment and you want to save the partial information that you have entered, and thus close the appointment window in order to edit it later on, press the **Buffer** button. This will save the appointment temporarily, with the option to edit it later without having to annotate changes made to the medical record.

The appointments placed into the buffer are marked with a green color in the **Appointment history** section of the **Patient card**.

To fill in the missing data for an appointment saved to a buffer, edit it and then press the **Save** button. From that moment on, any change to the appointment will require providing annotations. Appointments saved to a buffer can only be edited or deleted by the employee who entered them.

3.4. Electronic documentation and digital signature.

3.4.1. Basic information

SmartDental is compatible with WACOM STU devices and Windows pen tablets to ensure simple and fast preparation (based on ready-made templates), signing and storage of electronic documentation. Signature devices ensure that signed PDF documents are protected with a digital certificate.

3.4.2. Required hardware



Wacom STU-300, Wacom STU-430, Wacom STU-500, Wacom STU-530 digital signature tablet, or Windows pen tablets.

3.4.3. Additional requirements

In order for the electronic documentation part of the program to work properly, it is necessary to install the Adobe Reader software available on from <https://get.adobe.com/reader/>

3.4.4. Creation of electronic documents

To create an electronic document:

- press the  button available in the Patient Card
- press the  button available in the Patient Card > Documents tab.

Electronic signature

Once you have selected the appropriate document template and filled in the details, you need to press the Sign button for the doctor and the patient to sign the document. Once signed, the document is saved in the Documents tab of the Patient Card.

Traditional signature

It is also possible to print the document to be signed by the patient in the traditional way. Such a document can still be stored as paper documentation or imported (scanned) and stored electronically in the Documents tab of the Patient Card.

It is also possible to print out a blank or partially completed document for further manual completion.

3.4.5. Documents tab

In the **Documents** tab you will find all electronic documents generated, scanned or imported for a given patient. In the Documents tab, it is possible to:

- View the list of documents;
- Open the selected document;
- Generate new documents;
- Scan documents;
- Add documents from a file;

3.5. Patient billing

3.5.1. Overview

All patient billing documents can be found in the **Finances** of the **Patient Card**. The finances tab is divided into two tables: **Value of visits** and **Issued sales documents**.


Value of appointments		Financial documents issued									
Appointment date	Value	Date	Documents	Payment method	Value	Payment date	Payment method	Payment	Description	Employee	Category
2024-02-06	\$100.00	2024-02-09	Pa nr 1/2024/RACH		\$100.00	2024-02-09	Cash	\$100.00		Johnson Michael	Standard

Fig. Billing tab in the patient's chart

The **Value of appointments** table shows information about the date and amount due after the appointment was saved.

The **Financial documents issued** table shows information about the patient's deposits and/or issued sales documents.

Access to billing options

- To add a new sales document, click the  button at the top of the **Patient Card** window.
- All options, including settling sales documents and issuing advance invoices, are available in the menu after RIGHT-CLICKING billing item.

3.5.2. The primary way of settling the patient

Recording only the patient's payment is the easiest way to bill the patient. To settle the patient, you need to:

- select as **Payment method**: Cash, Card or Bank transfer;
- The amount to pay will be suggested based on the patient's balance

It is not possible to print a confirmation for this type of payment, but it can be transformed at any time into a printable sales document, i.e.: **Receipt**, **Cash receipt**, **Invoice** or **Prepayment invoice**.

For the purposes of billing analysis, the payment can be assigned to a given employee. This is especially important when the revenue is split between two or more doctors.

REMARK!!! A patient's payment can be converted into a fiscal receipt only if the date of payment and receipt issuance match.

The screenshot shows the 'Sales document' window for patient 'Smith Jackson James'. The window has a title bar with 'Sales document | Add | Smith Jackson James' and standard window controls. Below the title bar is a toolbar with icons for Print, Edit, Save, and Cancel. A tab bar at the top shows 'I want to issue an Invoice | Bill | Receipt', with 'I want to issue an Invoice' selected. The main area is divided into two sections: 'Patient balance' and 'Patient payment'.

Patient balance		Patient payment	
All procedures:	\$100.00	Date of sale	2/9/2024
All payments:	\$100.00	Payment method	Cash
Balance:	\$0.00	Category	Standard
		Payment date	2/9/2024
		Payment description	
		Payment value	\$0.00 + -
		<input type="checkbox"/> Assign to employee	

Fig. Basic method of patient billing

3.5.3. Issuance of sales documents

In order to issue a sales document, you need to expand the section **I want to issue an Invoice | Bill | Receipt** in the **Sales document** window. It is possible to issue:

- Fiscal receipt (only for situations when SmartDental is connected to a fiscal printer);
- Cash receipt for a single patient payment;
- Invoice for a single patient payment;
- Collective bill, invoice for previous payments, receipts or Cash receipts;
- Bill, invoice with payment by bank transfer (possibility of partial payment by the patient);
- Bill, invoice with deferred payment (possibility of partial payment by the patient);
- Cash receipt as an invoice settlement, a bill with payment by bank transfer;
- Cash receipt as an invoice settlement, a bill with deferred payment;
- Advance invoices;
- Cash receipt as an advance payment in the case of persons issuing invoices;

The numbering of sales documents can be configured as described in the

[Configuration of numbering of sales documents](#).

Sales document line items

In order to issue a fiscal receipt and/or other sales document (invoice, bill, cash receipt), you need to add line items (services) to the **List of items on the document** table. To do this, click the **Add from list** or **Add from day of sale** button.

- Adding from list** – is adding items to the document from the **List of documented services**, the configuration of which is described in chapter **List of documented services**.

- b) **Adding from day of sale** – is an automatic addition to the document of services that have been recorded in the patient's card on the day corresponding to the **Day of sale** of the issued document.

Issuing sales documents

To issue a selected sales document, select the **Document** option and choose the document type. After selecting a document, the document number will be generated according to the settings described in chapter [Configuration of numbering of sales documents](#).

Sales document | Add | Smith Jackson James

Sales document | Add

Smith Jackson James

Print

Edit

Save

Cancel

I want to issue an Invoice | Bill | Receipt

☒ Document

Number

Payment method

Date of issue

Invoice

1/2024/FVAT

Cash

2/10/2024

☐ Fiscal receipt

☐ Print patient's tax id nr

☐ Applies to previous payments/receipts

☐ Issue the document for a company

List of items on the document

+ Add from day of sale

+ Add from list

Service name	Tax	VAT	Price	Quantity	Value

Gross value of the documer \$0.00

Patient balance

All procedures: \$100.00

All payments: \$0.00

Balance: (\$100.00)

Patient payment

Date of sale 2/10/2024

Payment method Cash

Category Standard

Payment date 2/10/2024

Payment description

Payment value \$0.00 + -

☐ Assign to employee

Advance invoices

If you receive one of the forms of early payment, i.e. a down payment, prepayment, advance payment or installment, the only document that can be issued is a **Prepayment invoice**. Only VAT

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taxpayers have the option of preparing this form of advance document. This is due to the fact that the advance payment raises a VAT liability. As far as income tax is concerned, the **Prepayment Invoice** does not generate revenue and the received Invoice is not a cost.

A **Prepayment invoice** is drawn up as soon as the relevant amount due for the aforementioned payments has been paid. It cannot be *issued* later than the seventh day after receipt of partial payment. This will happen even if the service is not completely performed.

What about billers?

An entrepreneur who issues invoices is not able to document the advance payment with an advance bill. In such a situation, the payer can only write a confirmation of receipt of the advance payment in the form of a **Cash receipt** document. Since the advance payment is not income, no invoice is issued.

Printing Documents

When you click the **Save** button or edit a saved document, the print buttons for documents are activated.

3.5.3.1 Issuing a fiscal receipt

The option to issue **Fiscal receipt** appears only when SmartDental is connected to a fiscal printer. To issue a fiscal receipt, select the **Fiscal receipt** option.

A fiscal receipt can be issued:

- when adding a patient's deposit without additional sales documents;
- together with an additional document, i.e.: Cash receipt, Receipt, Invoice, Prepayment invoice;
- A fiscal receipt issued without an additional document may be part of a collective document (invoice or receipt) issued at a later date, as described in [Issuing a collective bill/VAT invoice](#).

3.5.3.2 Issuing a cash receipt for a single patient payment

A cash receipt document for a single patient payment can be issued:

- when adding a new patient deposit;
- when editing an existing deposit that is not linked to another document;
- as a settlement of a Receipt or Invoice with a transfer or deferred payment;

To issue a cash receipt document, you need to:

- select **Document** and select **Cash receipt**;
- specify whether the Cash receipt **should also be printed**;
- add document line items;
- specify the **Payment method** and the Patient's **payment value** and press **Save**.

3.5.3.3 Receipt or invoice for a single patient payment

A receipt or invoice for a single payment can be issued:

- when adding a patient's contribution;
- when editing a patient's payment that is not linked to another document;

To issue a receipt or invoice for a single payment:

- Select **Document** and select **Invoice** or **Receipt**;
- specify whether the Receipt **should also be printed**;
- add document line items;
- specify the **Payment method** and the Patient's **payment value** and press **Save**.

3.5.3.4 Issuing a collective receipt, invoice for previous payments or cash receipt.

A collective document can be issued for:

- any patient payment not linked to an additional document;
- each patient payment associated with a fiscal receipt and/or cash receipt issued for a single patient payment;

To issue a collective document, you need to:

- select **Document** and select **Invoice** or **Receipt**;
- tick **Applies to previous payments/receipts**;
- in the **Related payments or cash receipts** section select which items will be included in the document. When selecting related deposits, the **List of items on the document** is updated;
- if at least one of the items from **Related payments or cash receipts** section is a **deposit without a fiscal receipt and/or a dash receipt** and there are no related service line items, it is necessary to make a correction in the **List of items on the document** (by adding items or editing values) so that the sum of the values of the selected items from the **Related payments or cash receipts** section is equal to the sum of the values of the items in the **List of items on the document** section.

3.5.4. Hiding patient billing data between employees

In SmartDental it is possible to hide patients' billing data between employees. The option to hide billing data is available when adding or editing an employee in [Settings > Employees](#). To enable the hiding of billing information please uncheck the option [Show my financial data to other employees](#).

In this case, other employees can't see the employee's financial data, except if the other employee has the [Cash register | Billing patients](#) permissions enabled, which overrides the [Show my financial data to other employees](#) setting.

3.6. Prosthetics

SmartDental supports prosthetic scheduling, workflow between practice/clinic and dental lab, handover process, and billing with the dental prosthetic lab. It is possible to provide a detailed description of the work and a printout of the order for the prosthetic laboratory.

The prosthetics module is of particular importance in the case of billing. Normally, each prosthetic work can be saved as a procedure and its price can be specified when adding a patient visit. Such an action does not take into account the cost of performing such work, which in turn can be accounted for with a given work and can contribute to more accurate analyses of the work of the clinic.

3.6.1. Access to features

Adding a prosthetic work plan is available in the patient's card in the **Prosthetics** tab. There are three tables in the tab: **Prosthetic work**, **Work stages** and **Laboratory orders**. Instructions for adding, editing and deleting a plan, as well as the stage of treatment are available on the right side of each table.

Transfer of work to the technical laboratory and preview of previous work is supported in the **Patient Card > Prosthetics > Laboratory orders** table and in the **Laboratory orders** window available from the main program window.

Settlements with prosthetic laboratories are available in **Lab orders** window available from the main program window.

Handing over prosthetic work to the patient is available when admitting a patient for an appointment, i.e. in the **New appointment** window, section **Prosthetic work**.

3.6.2. General rules of handling prosthetic work

Prosthetic work plans are not linked to a specific patient appointment, but to the patient in general (patient's medical record). When prosthetic treatment is planned or has been initiated, a prosthetic work should be created in the patient's card. Once the work has been created, it can be ordered with the prosthetic laboratory **Patient card > Prosthetics > Laboratory orders** table and in the **Laboratory orders** window available from the main program window.

After completing a laboratory order, we set its status to **Sent**. If a given laboratory does not use its own laboratory cards, you can print an order for the laboratory and attach it to the submitted work. When you receive an intermediate stage, you should set its status to **Intermediate stage**. After receiving the final stage of work from the prosthetic laboratory, its status should be set to **To be handed out**. From now on, when you create a new patient appointment, the prosthetic work will be

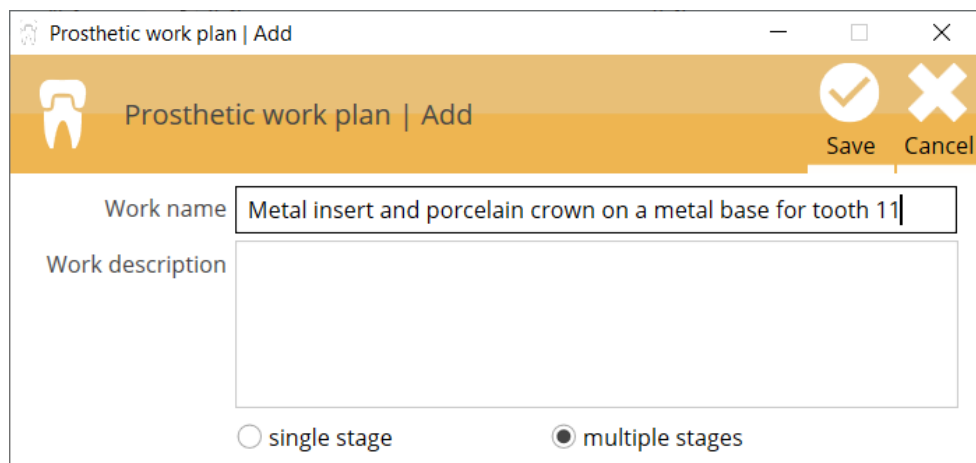
available to hand out in the [New appointment > Prosthetic works](#) section. Once the appointment is saved, the status of the work changes to [Handed out](#).

3.6.3. Prosthetic work plan: single or multi-stage




The prosthetic work plan can be single or multi-stage. A single stage plan is used, for example, when the prostheses included in this plan are sent to the laboratory in one stage, e.g. only a crown etc. In this case, the work plan is also a work stage. A multi-stage plan comprise of several works (example 1) or one work that consists of intermediate steps that we want to list (example 2). Staging can be used in a variety of ways. You can create multiple single-stage plans for multi-step work, as well as a multi-stage plan for single-step work.

Example 1. A metal insert and porcelain crown on a metal base for tooth 11.

We create a multi-stage treatment plan called, for example: "Metal insert and porcelain crown on a metal base for tooth 11".



We get the following entry in the Prosthetic Works table:


Prosthetic works			  	
Treatment name	Description	Stages		
▶ Test work		yes		
	Metal insert and porcelain crown on a metal base for tooth 11	yes		


Select it and in the [Work stages](#) table click [Add](#).


Now we can create the following stages:

- Metal insert tooth 11
- Porcelain crown on metal base tooth 11

Prosthetic work stage | New

 Prosthetic work stage | New

 Save

 Cancel

Work stage name


Metal insert tooth 11

Work stage description

Work stage type

Fixed denture

Characteristics

 Add


Due date


2/11/2024 12:00:00 PM


☒ Only save

☐ Add to laboratory orders

Prosthetic work stage | New

 Prosthetic work stage | New

 Save

 Cancel

Work stage name


Porcelain crown on metal base tooth 11

Work stage description

Work stage type

Fixed denture

Characteristics

 Add

Due date

2/11/2024 12:00:00 PM

☒ Only save

☐ Add to laboratory orders




Work stages



Stage name	Description	Due date	Status
▶ Porcelain crown on metal base tooth 11		2/11/2024	
Metal insert tooth 11		2/11/2024	

Or if an intermediate step is required to try on the metal substructure, we can create the following stages:

1. Metal insert tooth 11
2. Porcelain crown - metal base - tooth 11
3. Porcelain crown - finishing the work - tooth 11

Work stages   

Stage name	Description	Due date	Status
Metal insert tooth 11		2/11/2024	
Porcelain crown - metal base - tooth 11		2/14/2024	
▶ Porcelain crown - finishing the work - tooth 11		2/16/2024	

Example 2. An upper acrylic denture is to be made.

We create a multi-stage plan of prosthetic work called, for example, "Upper acrylic denture"

We create work stages, e.g.:

1. Individual spoon
2. Stencil
3. Wax denture
4. Acrylic denture

After receiving an intermediate stage of work from the studio (individual spoon, stencil, wax prosthesis, porcelain crown base, etc.), its status should be set to **Intermediate stage**. The next stage is sent to the lab.

Example: When we receive a wax prosthesis from the laboratory for the clinical stage (control in the mouth), we set the status of this stage to **Intermediate stage**. The next stage sent to the laboratory will be to make a finished denture, i.e. in the "Acrylic denture" stage, set the status to Sent.

After receiving the final stage of work from the lab, e.g. the acrylic denture, we set its status to **To be handed out**.

3.6.4. Additional characteristics of prosthetic work

When creating or editing a single stage work plan, or in the case of a multi-stage plan, when creating or editing work stages, additional options are available:

Characteristics – allows you to add work characteristics depending on whether the prosthetic work is fixed or mobile.

Characteristics of fixed denture

Color type: color guide Color: 3M2

☐ Include color map

Color guide type: VITA 3D Master

Build type: athletic

Front teeth shape: square

Foundation: nickel-free steel

Step: porcelain

Scheme of applying ceramics: normal

Incisal edge transparency: translucent

Incisal edge iridescence: blue

Face texture: irregular

Surface: matte

☒ Mamelons ☐ Enamel cracks ☐ Decalcifications

☐ Furrow pigmentation ☐ Translucent dentin

Characteristics of prosthetic works

Characteristics of removable denture

Characteristics of removable denture

Save Cancel

General

Build type **athletic** Front teeth shape **square**

☐ Include a denture design

Upper denture

Color guide type **Vitpan**

Color **A3**

Arc shape **regular**

Teeth alignment

Teeth size **large**

Denture reinforcement

Material **Acrylic**

☐ Colorless plate

☐ Individual characteristics of lip red

☐ Palatal folds

Lower denture

Color guide type

Color

Arc shape

Teeth alignment

Teeth size

Denture reinforcement

Material

☐ Colorless plate

☐ Individual characteristics of lip red

Characteristics of prosthetic works

3.6.5. Adding work to lab orders

Each of the created or edited work steps can be saved or immediately added to Laboratory Orders.


The screenshot shows a window titled "Prosthetic work stage | Edit" with a standard Windows-style title bar (minimize, maximize, close buttons). The window has an orange header bar containing a tooth icon, the title "Prosthetic work stage | Edit", and "Save" and "Cancel" buttons with checkmark and X icons respectively.


The main content area contains the following fields and controls:


- Work stage name:** A text input field containing "Porcelain crown - metal base - tooth 11".
- Work stage description:** A large, empty text area.
- Work stage type:** A dropdown menu currently showing "Fixed denture".
- Characteristics:** A button with a green plus icon and the text "Add".
- Due date:** A date and time picker showing "2/14/2024 12:00:00 PM" with a calendar icon to its right.
- Save options:** Two radio buttons: "Only save" (unselected) and "Add to laboratory orders" (selected).
- Laboratory:** A dropdown menu showing "AcmeLab".
- Cost of work:** A numeric input field with "+" and "-" buttons for adjustment.
- Status:** A dropdown menu showing "To be sent".

A **Work stage** can also be added to **Laboratory orders** or edited from the **Main Program Window > Lab orders**.

Laboratory order | Add

 Laboratory order | Add

 Save

 Cancel

Patient

Smith Jackson James

Treatment plan


Metal insert and porcelain crown on a metal base for tooth 11

Treatment stage

Metal insert tooth 11

Due date

2/14/2024 12:00:00 AM



Laboratory

AcmeLab

Stage status

To be sent

Work price

+

-

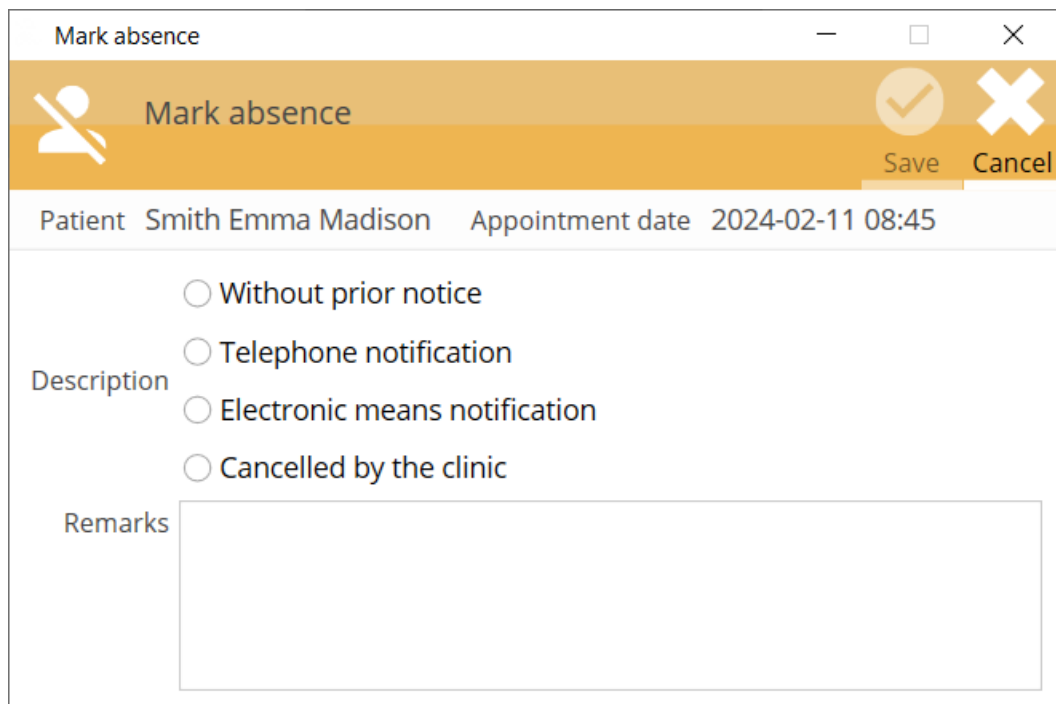
3.7. Appointments schedule

3.7.1. Registration of absences or cancelled appointments

The purpose of this function is to collect information about the number of cancelled appointments by the patient or the lack of attendance at the appointment without prior cancellation. This information is available in:



- [Patient card](#) > [Statistics](#) in the form of a detailed description
- In the window for adding a new appointment in the appointment schedule in the form of 
- In the list of appointments in the form of 

To mark the absence of attendance at the appointment, select the appointment in the schedule or the list of appointments in the main program window and press the right mouse button and select [Presence](#) > [Add absence](#).




The image shows a 'Mark absence' dialog box. The title bar says 'Mark absence'. The header bar is orange and contains a person icon with a slash, the text 'Mark absence', and 'Save' and 'Cancel' buttons. The 'Save' button has a checkmark icon. Below the header, there is a field for 'Patient' with the value 'Smith Emma Madison' and a field for 'Appointment date' with the value '2024-02-11 08:45'. Under the 'Description' label, there are four radio button options: 'Without prior notice', 'Telephone notification', 'Electronic means notification', and 'Cancelled by the clinic'. At the bottom, under the 'Remarks' label, there is a large text area.

After completing the no-attendance form, the following will appear:

- in the schedule – a red cross at the visit 
- in appointments list in the main window of the program 

However, if the patient comes to the appointment, it is possible to undo this action by clicking on the **Presence > Remove absence** in the aforementioned menu.

If at least one absence of the patient has been registered for the appointment, in the window of scheduling a new appointment in the schedule, next to the field indicating the patient, . When you hover the cursor over the icon, information about the number of absences is displayed, taking into account whether the patient informed about the absence of attendance at the appointment or not.

3.8. Warehouse

The system offers functionality that enables effective warehouse management in a dental office, including the creation of requests for quote. To make the work easier for users, there is an option to automatically generate orders based on the current stock of goods.

The functions available in the system are, m.in:

- **Inventory:** Overview of the warehouse by item category.
- **Merchandise Management:** Track the quantity of goods received, issued, and current stock in the warehouse.
- **Low Stock Alerts:** Receive information about low stock levels of individual items in the warehouse.
- **Item Stock Receipts:** Include the expiration date for stock receipts.
- **Internal Issues/Receipts:** Managing the flow of goods inside the cabinet.
- **Order Generation:** Ability to generate orders automatically or manually.
- **Export Purchase Orders to Excel:** Create a pre-order in Excel format to submit a request for quotation.
- **Import Quotes** from Excel: Ability to import selected quotes from Excel format.

These features provide comprehensive support in the management of warehouse resources, enabling the optimization of purchasing and storage processes in the dental office.

4. SmartDental key combinations

4.1. Management panel

General

- CTRL + F: Quickly search for the patient's card;
- ALT+F4: Close the active window;

Quick search for patient records

- DOWN ARROW: Go to the list of found patient records;
- ENTER: Open the card of the selected patient;
- ESCAPE: Close the search list

4.2. Login

- ENTER: Login approval;
- ESCAPE: Exit the window without logging in;

4.3. Patients list

- RIGHT ARROW: Go to the next patient page;
- LEFT ARROW: Go to the previous patient page;
- CTRL+F: Search for patient;
- CTRL + F2: Edit the selected patient;
- ENTER: Open the card of the selected patient;
- INSERT: Adding a new patient;

4.4. Patient card

- RIGHT ARROW: Move to the next tab;
- LEFT ARROW: Go to the previous tab;
- INSERT: Adding a new item in the current tab;
- ALT + INSERT: Adding a new item in the second table in the current tab;
- F2: Edit the position in the current tab;