

CUSTOMERS

Some interesting things about customers...

Worksheet

← Back+ New Order

Customer

🔍

Customer

Id	Jde Num	Name	Customer Co...	Private
1198		Customer 1		×
1216		Customer 2		×
1283		Customer 3		×
1319		Customer 4		×
1351		Customer 5		×
1372		Customer 6		×

Add New Customer

In DentaCAD Classic, to start an order you have to pick a customer and once you pick that customer and start the order you cannot change the customer. This is no longer the case in SmartSales.

To change the customer on an order simply click in the text field labeled “Customer” to open the Customer Search. Now type in the business name, persons first or last name or JDE number and the search results will filter for you search parameters.

You can sort the search results by clicking on the column headers. Click anywhere on the line of a customer to change the orders target customer.

You can also start an order for a customer in the Customer Search screen. At the far right of the line for any

Customers

Create a new customer → +

Search... Start a new order →

ID	JDE #	Name	License #	Specialty	Address	City	State	Zip	Phone	Contact	Status	Actions
405730	1234567	Topher's Smile			123 Main Street	Anytown		21134	(999) 111-1111	Topher White	Private	 
405728	9991111111	Topher Dental			123 Main Street	Anytown	MD	21157	(999) 111-1111	Topher White	Private	 

particular customer click on the “paper” icon to start a new order with that customer’s data pre-populated.

From this screen you can also create a new private (seen only by you) customer. Click on the “+” symbol in the upper right area of the Customer Search screen to open a customer creation dialogue box. This process should be quite a bit more straight forward than the process in DentaCAD Classic. You can edit your private customers from this view by clicking on the pencil icon at the end of the target customers line. Editing of non-private customers has been locked out for non-admin users.

Customers you create will have a checkmark in the column labeled “Private” in the customer search on the worksheet. (On the Customer Search view the column is currently labeled “Status”).

Customer

Id	Jde Num	Name	↓	Customer Co...	Private
405730	1234567	Topher's Smile		Topher White	✓
405728	9991111111	Topher Dental		Topher White	✓

You can make changes to customer information (global/shared customers as well as private customers) in the Customer Information section of the Order Worksheet screen. However any changes you make here only apply to this order. The changes will be used for any generated Forms or orders that are OrderLinked. They will also “stick” (save) in this order (once the Save button is clicked) but the changes will not save back to the customer record and thus will not be in place if this customer is selected for another/new order. To make permanent changes to a private customer please do so from the Customer Search view.

Customer Information

Hide

Billing Information			Shipping Information		
Company Topher Dental			Ship to Topher Dental: 123 Main Street		
Address 123 Main Street		Suite 100	Address 123 Main Street		Suite 100
City Anytown	State MD	Zip 21157	City Anytown	State MD	Zip 21157
Phone (999) 111-1111		Fax	Phone (999) 111-1111		Fax
Contact Topher White			Contact Topher White		

It is not possible at this time to delete private customers.