

# OralArts

DENTAL LABORATORIES HUNTSVILLE, ALABAMA

## Customer Portal USER GUIDE



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# Registration and Login

Register to gain access to all of your case and payment information.

## Registration:

1. Visit [www.oralartsdental.com](http://www.oralartsdental.com) and click on the Customer Portal Tab or go to [portal.oralartsdental.com](http://portal.oralartsdental.com)
2. In the navigation bar, select:

Not a Member ? [Sign Up](#)

Which will lead you to the following screen:

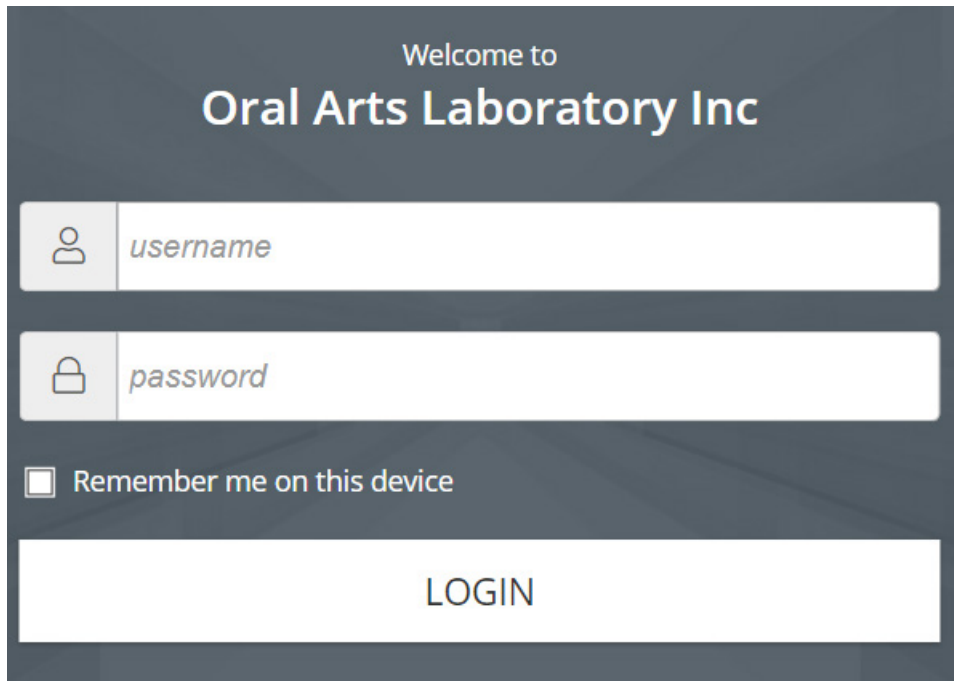
The screenshot shows a registration form for Oral Arts Laboratory Inc. At the top, it says "Thank you for registering with Oral Arts Laboratory Inc". Below this is a section titled "Account Information" with three input fields: "account number", "account email", and "account office phone". Each field has a question mark icon to its left. Below the "Account Information" section is a section titled "Choose your login credentials" with three input fields: "username", "password", and "retype password". The "username" field has a "Verify" button to its right. Below the "password" and "retype password" fields is a CAPTCHA image showing the letters "YHMKK" with a refresh button to its left. Below the CAPTCHA is an input field labeled "type the image code". At the bottom of the form is a large white button labeled "REGISTER".

1. Enter in the required values and click register

*\*Any information that is unknown and needed for registration, please call us at 1-800-354-2075 and we will be happy to assist*

**Login:**

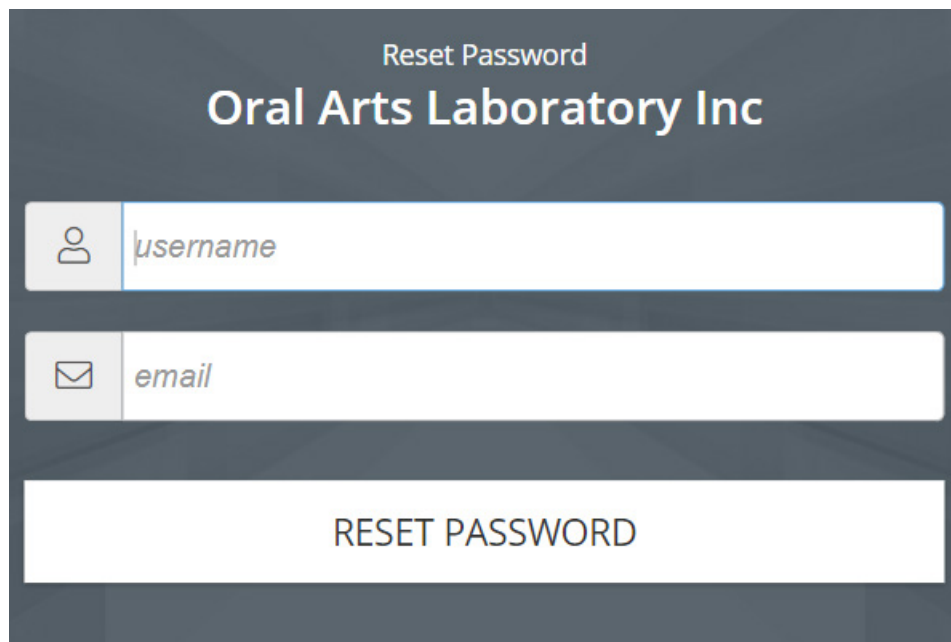
1. Once successfully registered, enter your username and password, click on login:



The screenshot shows a login interface for Oral Arts Laboratory Inc. At the top, it says "Welcome to Oral Arts Laboratory Inc". Below this are two input fields: the first is labeled "username" with a person icon, and the second is labeled "password" with a lock icon. There is a checkbox labeled "Remember me on this device". At the bottom is a large white button labeled "LOGIN".

**Forgot Password:**

1. In the event you forget your password, proceed to the customer portal login in screen and select the "Forgot Password" button
2. This will direct you to the following page:



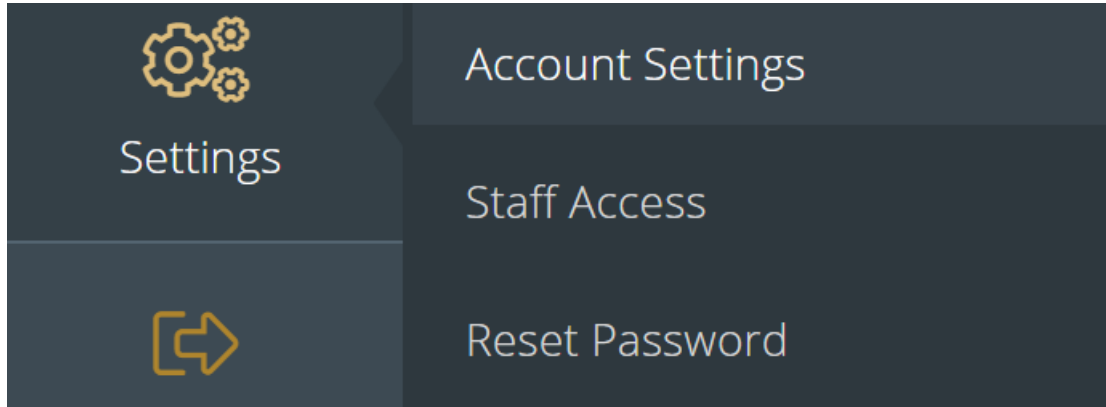
The screenshot shows a "Reset Password" page for Oral Arts Laboratory Inc. At the top, it says "Reset Password Oral Arts Laboratory Inc". Below this are two input fields: the first is labeled "username" with a person icon, and the second is labeled "email" with an envelope icon. At the bottom is a large white button labeled "RESET PASSWORD".

3. Once you have selected RESET PASSWORD, an email will be sent you with a new, temporary password. After recovering access, it is recommended to reset your password.

*\*In the event the steps above are unsuccessful, call us at 1-800-354-2075 and we will provide you with a temporary password to login, and then suggest changing it for security purposes*

**Reset Password:**

1. On the main navigation bar, select the Settings menu and choose the Reset Password menu option:



2. The following form will open allowing for you to enter your new credentials. Please note, your current or the temporary password provided to you will be required to set a new password.

---

**Reset Password**

Current Password:

Password:

Retype Password:

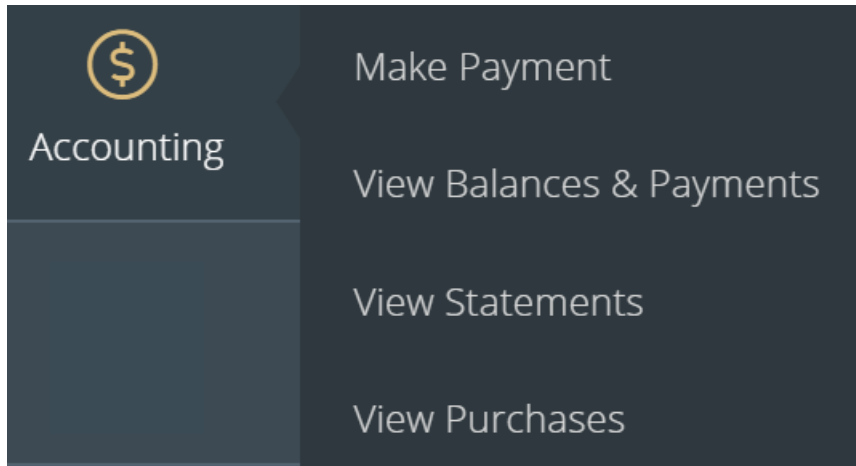
SAVE CHANGES

# Accounting

This section can be used to make payments, to view previous payments and to view statements.

## **Make a Payment:**

1. From the main navigation bar, select the Accounting menu



2. Select the Make Payment Button where you can:
  - Pay Total Balance
  - Pay Balance Due Now
  - Pay Past Due Balance
  - Pay a Specific Amount
  - Pay Specific Invoices
  - Enter Payment Notes
3. Payment can be completed with the information on file, or by entering a new card and billing information
4. To process a payment:
  - Select the payment type
  - Select if you wish to pay the total balance, or a specific amount
  - If you choose "Pay Selected Invoiced", ensure that you check the box next to each invoice you wish to pay
  - Process payment

### **View Balances and Payments:**

1. From the main navigation bar, select the Accounting menu
2. Select the View Balances & Payments menu option
3. This page displays the following summary fields:
  - Recent Activities
  - Aging Summary
  - Payments & Credits

### **View Statements:**

1. From the main navigation bar, select the Accounting menu
2. Select the View Statements menu option
3. Select the statement period you would like to view and a new browser window will open, allowing you to view, print or download the statements

### **View Purchases:**

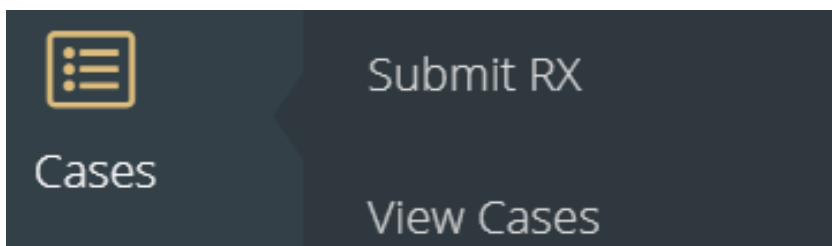
1. From the main navigation bar, select the Accounting menu
2. Select the View Purchases menu option
3. This section displays a quick overview of purchases, purchases in progress, credits and remakes. While it is not intended for accounting purposes, this up-to-date information may be needed. The summary fields displayed are the following:
  - Purchases- Invoiced Cases
  - Purchases in Progress- Cases in Production
  - Credits – Total Credits Issued
  - Remakes – Total Remakes

## **Cases**

Submit cases and track submitted cases as their status and locations are progressively updated.

### **Submit an RX:**

1. From the main navigation bar, select the Cases menu
2. Select the Submit RX menu option



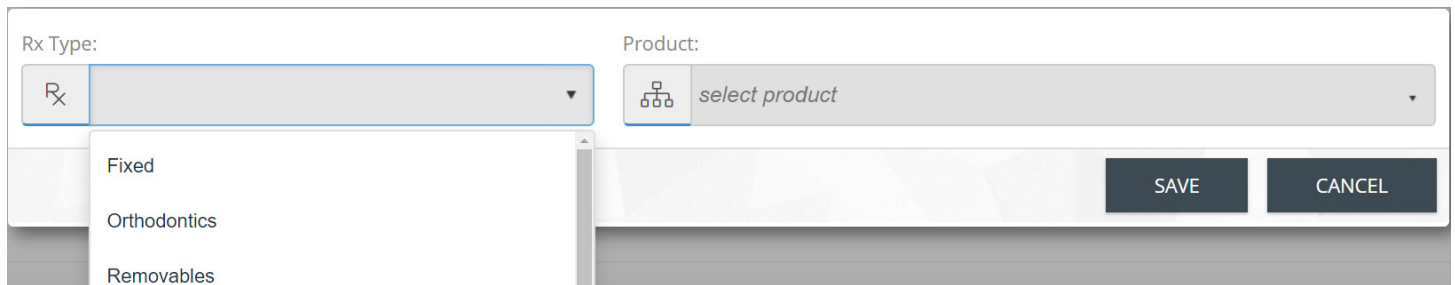
### Case Information:

1. Once in the Submit RX page, you will complete the following fields:
  - Case Type (New Case, Remake Case, Adjust Case)
  - Doctor Name
  - Patient Details
  - Case Details
  - Add Products
  - Upload and attach documents, files or images
2. After you have entered all the necessary Case Information, proceed to add Products by selecting



### Product Instructions

1. Once the Add Product form is open, select the RX Type. Based on the RX Type selection, the product offerings will display and the form will expand for a selection of preferences and product instructions



2. After you have added all the products, preferences and instructions select Save.
3. If the case needs to be rushed, please check the box accordingly. \*Note: Extra fees may apply for rush cases. Please call us at 1-800-354-2075 with any questions\*

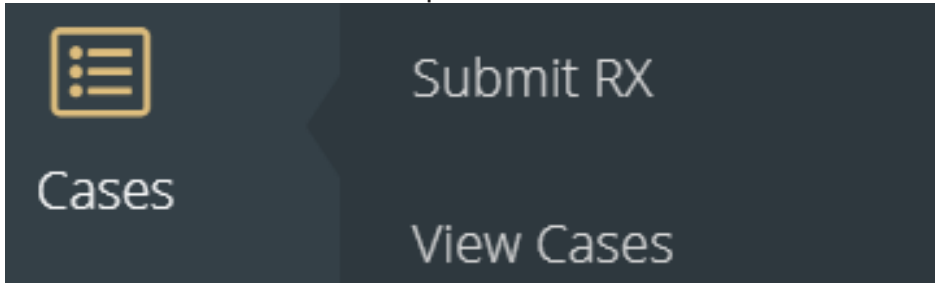


4. Authorize the case and click Submit

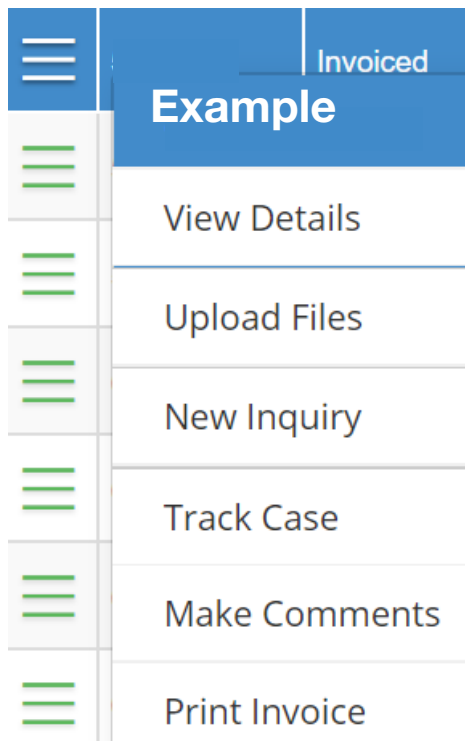


**View Cases:**

1. From the main navigation bar, select the Cases menu
2. Select the View Cases menu option



3. Once in the View Cases menu option you can:
  - Filter by doctor name
  - Sort cases by any of the available columns
  - Drag and drop to rearrange the order of the columns
  - Export the list of current cases
  - View case details
4. Select to view your case details and you can select from the following menu options:



- ***View Details***
- ***Upload Files***
- ***View Attachments***
- ***New Inquiry***
- ***Make Comments***
- ***Print invoice***

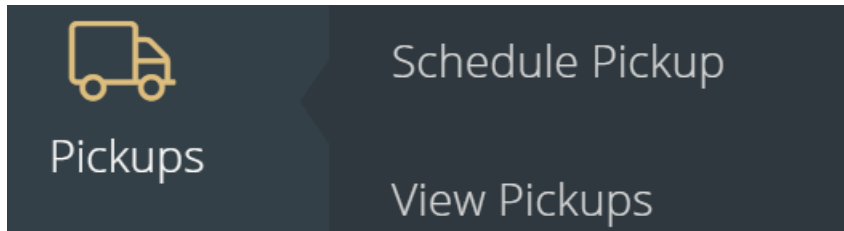
# Pickups

Request a pickup and view existing scheduled or requested pickups.

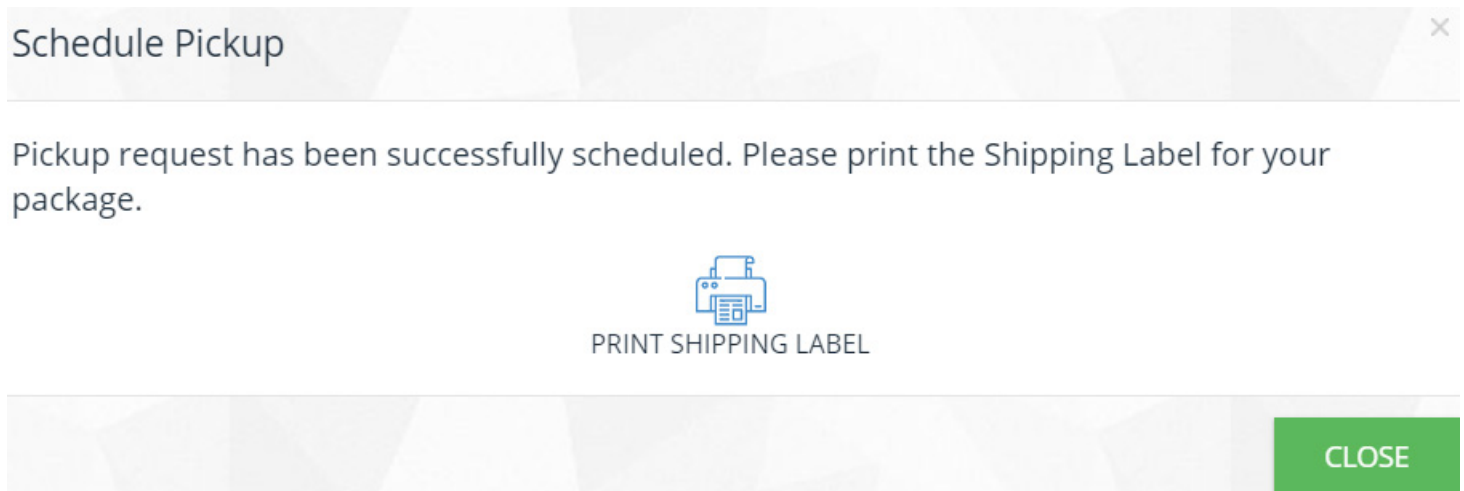
**For every 100 pickups scheduled using our portal, Oral Arts credits you the cost of one crown!**

## Schedule Pickups:

1. From the main navigation bar, select the Pickups menu
2. Select the Schedule Pickups menu option



3. This will bring you to the Schedule Pickups page and you will need to enter the following:
  - Service Center
  - Service Type for Carrier Shipping
  - Route for Local Shipping
  - Pickup Date
  - Pickup Time From
  - Pickup Time To
  - Number of Packages
  - Total Weight
  - Comments
4. Once all information has been completed, select Schedule Pickup and you will receive an on-screen dialogue confirming the pickup request along with the option to print the shipping label



5. For pickups with tracking numbers, you can also click on the tracking to view its status on the carrier's website

## View Pickups:

1. From the main navigation bar, select the Pickups menu
2. Select the View Pickups menu option
3. From the View Pickups, you may view the following information for all listed pickups:

- Pickup ID
- Schedule Date
- Pickup Date
- Pickup Times
- Status
- Carrier
- Tracking Number

4. You can also request a new pickup, as well as access the following actions on each listed pickup:

Void Pickup



View/Print Label



Pickup Notes

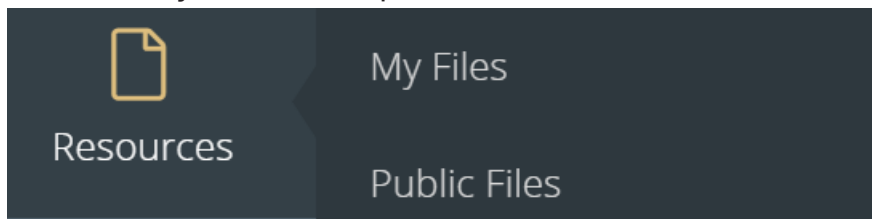


*\*It is important to note, that your account's default shipping method will determine whether the pickup that is scheduled will either be a local pickup request or a carrier pickup\**

## Resources

### My Files

1. From the main navigation bar, select the Resources menu
2. Select the My Files menu option



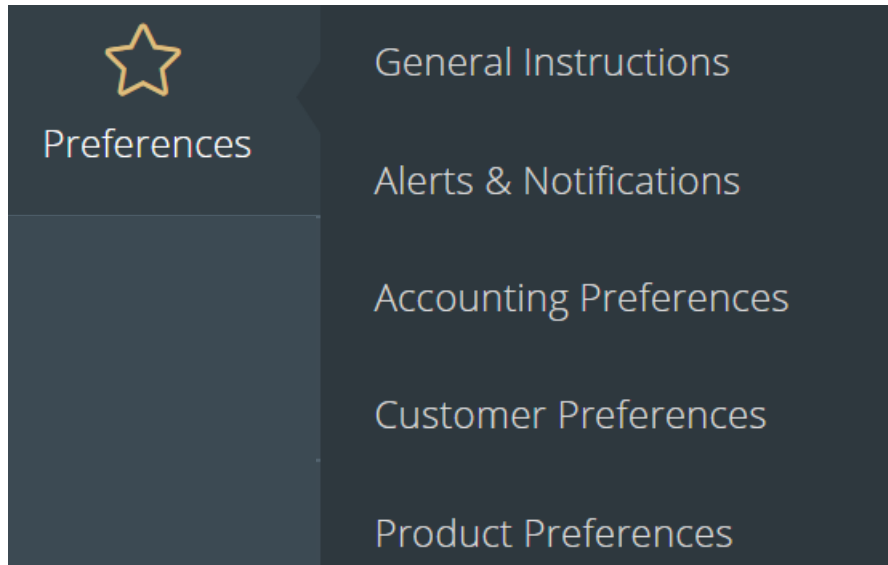
3. This page is designed for you to upload images and attachments for cases that are not yet sent to the lab or if the case number is not known. This page can also be used to upload any documents, contracts or forms that should be shared with the laboratory. For cases that have already been sent to the lab, please click the View Cases and find the appropriate case to upload attachments
4. With each upload, you may enter the following information:
  - Patient First and Last Name
  - Document Date
  - Attachments Description
  - Department
  - Attachment Notes

## Public Files

1. From the main navigation bar, select the Resources menu
2. Select the Public Files menu option
3. This page is designed to access files, images or documents that the laboratory has shared with you

# Preferences

Configure your alerts, notifications and instructions to your account and set manufacturing preferences in one spot.



## General Instructions

1. From the main navigation bar, select the Preferences menu
2. Select the General Instructions menu option
3. This page will display a free text box that you can enter any notes that should generate on every single case's work order form to be used in production in the laboratory

## Alerts & Notifications

1. From the main navigation bar, select the Preferences menu
2. Select the Alerts & Notifications menu option
3. This area is designed to specify when and what types of alerts should occur, with two categories that may be activated: Alert Me of Changes as They Occur During the Day and Alert Me Once at The End of The Day. Each of these sections contain different options which will trigger an alert
4. Once all of the desired alerts have been configured, it is important to complete the Notification Methods. The available methods are:
  - Email
  - Text Messages

## Accounting Preferences

1. From the main navigation bar, select the Preferences menu
2. Select the Accounting Preferences menu option
3. This page allows you to configure the method in which you will receive your monthly billing statement
4. It is important also to complete the Billing Contact Email with the correct recipient who should receive the statement

## Customer Preferences

1. From the main navigation bar, select the Preferences menu
2. Select the Customer Preferences menu option
3. This page is to define any general preferences that should generate automatically on every case's work order to be used in production in the laboratory
4. In addition to adding preferences, you may view or modify any existing preferences already configured for all doctors or a specific practice doctor
5. To add a preference, select



6. From this form, first you will need to select the Preference Type and then either select predefined values or enter a custom value. When all selections or text have been added, click Save

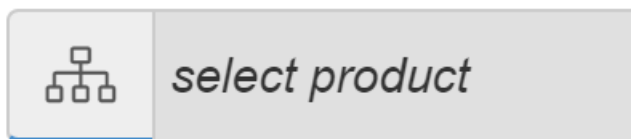
## Customer Preferences

1. From the main navigation bar, select the Preferences menu
2. Select the Product Preferences menu option
3. This page is to define any product specific preferences that should generate automatically on every case's work order to be used in production in the laboratory
4. In addition to adding preferences, you may view or modify any existing preferences already configured for all doctors or a specific practice doctor
5. To add a preference, select



6. From this form, you will first select the product in which you would like to add the preference for

Product:



7. Once selected, you will then need to select a preference type. Based on the type that is selected, you will then select the predefined value or enter a custom value. When all selections have been made, click Save

# Messages

This area is designed to quickly view any messages and attachments sent by your laboratory. You can also easily send any questions or comments to your Lab.

## **View Message**

1. From the main navigation bar, select the Messages menu
2. In the Messages page, you can view all correspondence that you have received from your laboratory

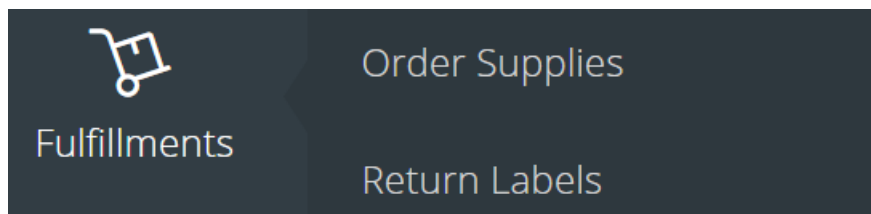
## **Send Message**

1. From the main navigation bar, select the Messages menu
2. Select the Send Message menu option
3. Enter a subject, briefly describing your inquiry, and enter your detailed description into the message field, Send
4. Please give us at least 24 hours to respond via Messages through the portal

# Fulfillments

## **Order Supplies**

1. From the main navigation bar, select the Fulfillments menu
2. Select the Order Supplies menu option



3. The corresponding supply items will display accordingly and you may select as many items as desired

### Order Supplies

GENERAL SUPPLY

<input type="checkbox"/> Duraflex Education Kit <i>Quantity: 1</i>	<input type="checkbox"/> Duraflex Shade Guide <i>Quantity: 1</i>	<input type="checkbox"/> EMA Sample <i>Quantity: 1</i>
<input type="checkbox"/> FedEx 2 Day Labels <i>Quantity: 25</i>	<input type="checkbox"/> OA Small Boxes <i>Quantity: 6</i>	<input type="checkbox"/> RX Pads <i>Quantity: 2</i>
<input type="checkbox"/> TCS Shade Guide <i>Quantity: 1</i>	<input type="checkbox"/> UPS Ground Labels <i>Quantity: 60</i>	<input type="checkbox"/> White Foam <i>Quantity: 1</i>

ORDER SUPPLIES

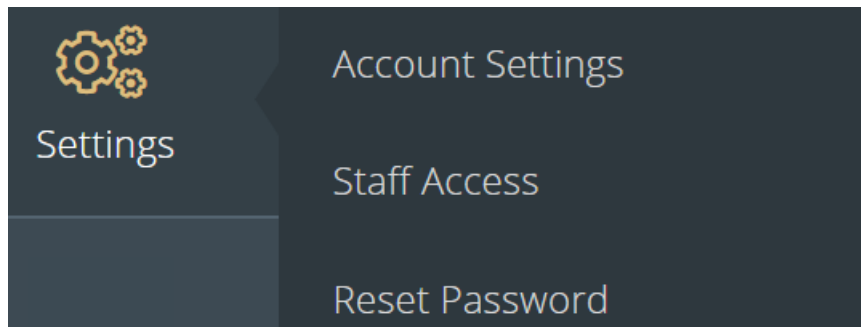
4. Once all items have been selected, click Order Supplies and you will receive a confirmation that your request has been successfully processed

### Return Labels

1. From the main navigation bar, select the Fulfillments menu
2. Select the Return Labels menu option
3. If available for selection, select the appropriate Service Center
4. If available for selection, select the service and package type as well as the number of labels
5. If you intend to pay for the shipment for each return label, please check the option accordingly
6. Once all information is entered, select Create Labels

# Settings

Modify and configure your account settings, web settings, staff access and reset password. This includes Practice Name, Phone Numbers, Emails, Passwords and more.



## **Account Settings**

1. From the main navigation bar, select the Settings menu
2. Select the Account Settings menu option
3. The editable fields will include:
  - First Name
  - Last Name
  - Practice Name
  - License
  - Office Phone
  - Cell Phone
  - Fax
  - Email
  - Shipping Address
  - Billing Address



## Staff Access

1. From the main navigation bar, select the Settings menu
2. Select the Staff Access menu option
3. You may create staff records and create user logins to grant any member of your staff access to the portal
4. To add a new staff login, select



5. Complete the General Information section
6. To enable portal access, you will need to select the option for web access

## Web Access



7. It is important to note the different levels of access that you may grant to staff users. There are three categories and all have different access throughout the portal
  - Basic** has access to the following modules:
    - Cases, View Cases, Pickups, View Pickups, Messages, View Messages, Settings
  - Standard** has access to the following modules:
    - Accounting, View Statements, Cases, View Cases, Submit RX, Pickups, Schedule Pickup, View Pickup, Resources, My Files, Public Files, Preferences, General Instructions, Alerts & Notifications, Accounting Preferences, Product Preferences, Messages, Contact Lab, Order Supplies, Settings, Account Settings
  - Full** has access to all modules

