



Magic Touch Software

Info@MagicTouchSoftware.com

Voice: 760.481.3238

DLCRM Custom Applications

Last Revised: 4.17.2007

DLCRM Custom Applications

The following features have now been released as add on applications for the DLCRM product with the same goal of lab optimization and streamline processes in mind as the base product. These custom features take this ideal to the next level by providing for a design that will further enhance and simplify your day-to-day lab processes. While all information that is generated or referenced by these add-on features is derived from both DLPlus and DLCRM, you can rest assured that your software is working together in complete harmony.

RX Scanning System

- ❖ Tired of filing away all of the old RX's? Filling up your storage rooms with stacks of papers? Then you should explore this scanning module available only in DLCRM. Simply scan your Work Orders, RX's and any other relevant case documents and let DLCRM automatically sort them out, attach images to DLPlus, and instantly make these images available to all users in DLPlus and DLCRM at all locations.
- ❖ Tired of looking for an old RX from 2 years ago for a remake case, see how easily you can find images stored with the original case # and print any and all pages as needed to remake the Case or verify an issue.
- ❖ You no longer need to file away the paper RX forms in storage or file cabinets and hassle with trying to find them later.
- ❖ This custom scanning feature is built according to your lab's specifications for a one-time fee. All automated systems will run according to specified times and days and do not require interaction from your staff to remember when to run them.

Automated Account Recovery Call Creation

- ❖ Another feature you will only find in DLCRM is the ability to proactively scan your database and generate call records using specified criteria that has been fully customized to your lab's requirements. These Calls will be assigned to an individual, a group, or even a department.
- ❖ Your Sales staff can then follow up on these calls and address the reason for the doctor's decreased case load with your lab before you lose that account. For example, at the first of each month, you can compare the Sales for the previous month compared to the month before and if the sales or even units have dropped a certain percentage, DLCRM will create call records and assign it to the "Marketing Department."
- ❖ Imagine being able to proactively contact doctors and offer incentives to bring them back on their way out rather than waiting until the door has been shut.

Automated Account Collection Call Creation

- ❖ Suppose you are able to arm your accounting department with the ability to come to work in the morning and already know what doctors need to be contacted and why. With this custom add-on feature DLCRM will periodically scan your entire database for all past due accounts according to your specific criteria and will generate call records accordingly.
- ❖ As these calls are created in DLCRM, they can be viewed in either the doctor's specific record or in the Calls Management window making it easier than ever for the collection department to follow up on these delinquent accounts.
- ❖ With complete flexibility in how often and what criteria to base these calls, your accounting department will never be happier with this new feature.

Account Collection Follow up Letters

- ❖ This add on feature introduces the ability to create queries based on specified criteria available in DLPlus and/or DLCRM for any type of past due accounts. Once the doctors have been filtered accordingly, with a few clicks you can then print a customized reminder letter to be mailed to the Doctors.
- ❖ All of the letters generated will be tracked with in DLCRM and a permanent record will be kept in each doctor's account. The next time you wish to print a batch of letters, you also have the option to exclude those doctors that have already received this letter in the last 30 days or what ever time frame you choose.
- ❖ It's never been easier to stay on top of those delinquent accounts that used to cause problems.

Automated Account Collection Follow up E-Mail

- ❖ Much like the Account Collection Letter module, this feature is designed to work based on a specified query. However, the Automated Account Collection Email service takes all of the manual processing out of the equation. Basically once the setup is completed, this feature will automatically generate a custom e-mail, send it to the Doctor and create a Call record in DLCRM for tracking purposes.
- ❖ Again, the details of when, why, and how often are completely at your lab's discretion.

Doctors' Performance Rating

Doctor Performance Rating	
Rating Group	Rating

❖ Yet another feature that you will only find in DLCRM is the ability to rate or grade your doctors based on any set of criteria you find most important. All we require is a breakdown of the rating units and the criteria you wish to use. Also decide how often you want to calculate and update the doctors' rating and we take care of the rest.

- ❖ Once the setup is completed, DLCRM will automatically produce ratings for all doctors and populate the Doctor's Performance grid found on the first page of the Doctors View.
- ❖ For example, it is possible to give all of your doctors a Sales rating based on a scale of 1 to say 100, with 100 being the highest rating possible. At the same time, you can even decide to give all of your Doctors a Fixed Department rating or a Removables rating based on the amount of sales they produce every month. This rating could be a letter grade A through F.
- ❖ The rating guidelines are completely flexible and can be based on anything from sales to return percentage to product types. They can also be recalculated at any time interval you choose, whether it be weekly or even hourly. The possibilities are endless.

Direct Mail Marketing Campaign

- ❖ We can create customized queries based on any criteria available in DLPlus and/or DLCRM and in turn can be used for direct mail marketing campaigns.
- ❖ You may choose to print the letters yourself or take advantage of the built in export feature that will export the doctor record and all specified fields to whatever file type you specify. This file can then be submitted to your own fulfillment centers or an outside marketing vendor to take care of delivery.
- ❖ You may also associate these mailing with a given Campaign to evaluate the result of your campaigns or track any discounts you may have offered.

Automated COD Accounts Monitoring

- ❖ This feature will automatically place those Doctors on COD that fit into whatever criteria your lab specifies and will creates call records accordingly for your staff to follow up.
- ❖ If the Doctor happens to make a payment and no longer falls into your specifications for COD, the flag is then removed automatically and you are able to invoice the cases as usual through DLPlus.

- ❖ This feature takes the guesswork out of maintaining your COD Accounts.

Automated Shipping Time Constraint Monitoring

- ❖ This feature will eliminate yet another manual task that has proved necessary in providing your doctors with the absolute best customer service possible.
- ❖ DLCRM can automatically generate call records for those cases that have been entered and the specified due date happens to fall before the expected ship date that was calculated based on working days in the lab for that product.
- ❖ Your staff will then use these calls to contact doctor and discuss the proposed ship date right immediately after the case has been entered instead of when the Case is due out.
- ❖ Your doctors will never be happier knowing your lab is on top all scheduling issues early.

DLCRM Web Subscription Services

- ❖ DLCRM has introduced the ability to allow your doctors to communicate directly with your lab 24 hours a day / 7 days a week via the Internet. Imagine having a website dedicated to your doctors that can offer up to the minute case progress as well as case submission, image and file uploads, case pick up requests, and accounting data including balance and payment information.
- ❖ Once subscribed to the Web Services module, our experts will work hard to create a website that meets your aesthetic requirements. Your doctors will simply need to set up their own personal account and log on information. Once this step is completed, your doctors will be authenticated by the latest in online security and given access to all of the functionality previously mentioned.
- ❖ For example with just a few clicks your doctors are able to submit a case online, instantly providing your lab with patient information, shade, requested ship date, case type, product, quantity, tooth #'s, and any extra notes they feel are important to the case. At the same time, your doctors can upload pictures they may have taken chair side. Once the doctor clicks submit, this case information as well as the attached images are then entered in your DLPlus database automatically where your lab can then bring up the case and add further production information or just begin work on the case. Most if not all of the case entry is already done.
- ❖ Just as easily as your doctors can log in and check the status of a case, they can also submit a credit card or check payment, and even request a pick up from your lab without ever picking up the phone.
- ❖ Picture how your doctors will feel knowing their lab offers this kind of security and support 24 hour a day that only DLCRM Web Subscription Services can provide.

Data Synchronization Services

- ❖ Do you outsource to other labs? Do you worry the case was received late? Do you wonder what progress has been made? Or when will the case ship? Then the Data Synchronization module available only in DLCRM is the answer to all your outsourcing worries.
- ❖ This feature will require the Production Facility (where the case is outsourced to) to install DLPlus and DLCRM together. Once this setup has been completed, any case that is entered and the production facility is changed to another Lab through DLPlus, DLCRM Sync will automatically transfer the case to the production facility database so there will be no need for them to enter the case again. No re entry means less room for clerical and other errors.
- ❖ As the case goes through the lab at the production facility, DLCRM Sync constantly updates the original records at the origin facility so you have an up to the minute complete and instant progress report available at all times. Imagine knowing exactly when your case will ship back to you while on the phone with your Doctor.
- ❖ If you decide to make any changes to the case at the origin facility, including products, tooth #'s, shade changes, etc., or even create call records related to the case, DLCRM Synchronization will automatically (optional feature) transfer your calls and notes to the production facility eliminating the need to notify them. Also, if the production facility replies to these call records or notes, you will automatically receive it at the origin facility and DLCRM will keep permanent track of the notes in the specific doctor record at both locations.