

Vendor Portal Manual

Every screen of the Dentrist vendor portal, step by step: the lab portal, the dentist portal and the technician view.

VERSION 1.0 · NOVEMBER 2026

The vendor portal is the web application a dental lab uses every day in Dentrist. It follows a case from the moment a dentist sends it, through production on the bench, delivery, invoicing and payment, and posts every amount automatically to a full double-entry accounting system. The same portal adapts to whoever signs in: lab admins and staff, technicians, and the dentists who send cases to the lab.

This catalog walks through every screen of the vendor portal, step by step, with screenshots. The screenshots come from the **Demo Lab EN** demonstration lab, so the clients, orders and amounts you see are sample data. Each demo order uses **one formula type** across all of its units so the lists stay easy to read.

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1. Introduction

1.1 What Dentrist does

Dentrist brings everything a dental lab does into one bilingual (English and Arabic) workspace:

- **Lab management (LMS):** orders, the FDI tooth chart, shades, production phases, technicians, couriers, files and 3D scans, delivery dates and a calendar.
- **Client management (CRM):** clinics, hospitals and partner labs, their dentists, special prices, prepaid wallets and account statements, plus a portal where dentists send and follow their own cases.
- **Finance and accounting:** invoices and payments, expenses, suppliers and bills, technician pay, salaries, cash and bank, inventory, tax, and a real ledger with a trial balance, profit and loss, balance sheet and cash flow.

1.2 Who uses the vendor portal

Person	What they see
Lab admins and staff	The full lab menu: orders, clients, catalog, users, sales, expenses, cash and bank, accounting, reports and settings. Most of this catalog is about this view
Technicians, couriers and other staff roles	A reduced menu with the orders assigned to them (see 15. The technician view)
Dentists and clinic staff	The **dentist portal**: they send orders to the lab and follow their status, invoices, statement and wallet (see 14. The dentist portal)

Everyone signs in at the same address; the menu adapts to the person who signs in. Labs join Dentrist from the Dentrist website, and the Dentrist team creates the lab and its first admin account.

1.3 User roles

Every person signs in with their own account. What they see in the menu, and what they can do on each page, depends on their role:

Role	Typical person	Main access
Admin	Lab owner or manager	Everything in the lab portal, including settings, finance and users
Technician	Bench technician	Orders assigned to them, the calendar, phases and order chat
Courier	Delivery driver	Orders to deliver and their delivery status
Accountant	Internal or external accountant	Finance and accounting pages, mostly read-only
Designer	CAD designer	Orders and design files
Scanner	Scanning technician	Orders and scan uploads

Role	Typical person	Main access
Dentist	Dentist or clinic account	The dentist portal: their own orders, invoices, statement and wallet

Admins can also build **custom roles** with exactly the permissions they need when the feature is enabled for the lab (see 7. Users and roles).

1.4 The life of an order

Every feature in Dentrist hangs off the order. A typical case moves like this:

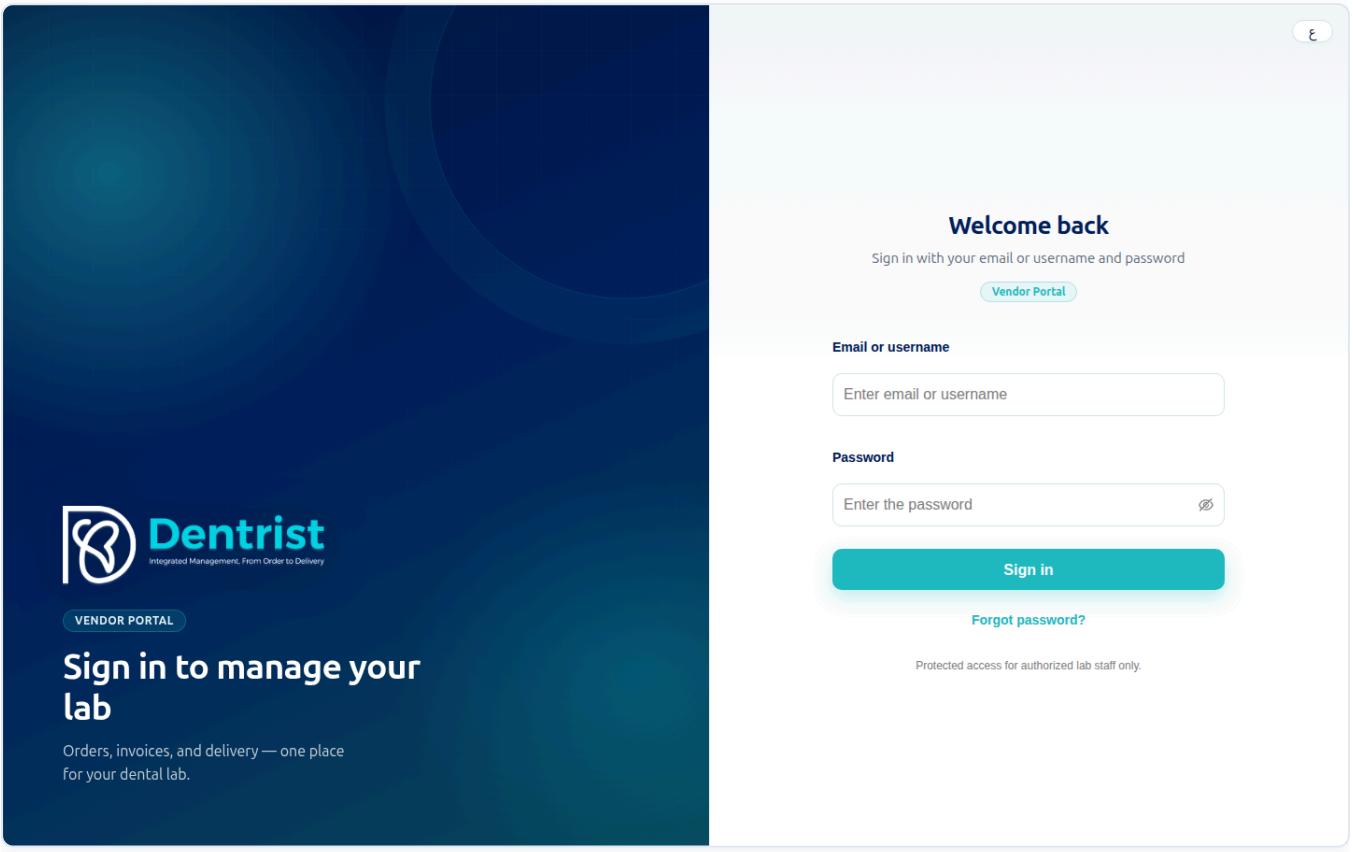
1. **Order received.** The lab creates the order, or the dentist sends it from the dentist portal. It starts as *Requested*.
2. **Production.** The lab moves it to *In Progress* (or the lab's own production statuses), assigns technicians, and ticks production phases such as Model, Design and Finishing. At this point Dentrist records the production cost of each unit.
3. **Delivery.** The order goes *Out for Delivery*. From the lab's **billable status** (usually *Out for Delivery*) the order amount is owed by the client and counts as revenue.
4. **Invoicing and payment.** The order is added to an invoice, the client pays (cash, bank, transfer channel or wallet), and the order is *Closed*.
5. **Accounting.** Each step posts a balanced journal entry, so the reports and financial statements are always up to date.

> **Tip:** Which statuses exist, their order, which one is billable and which ones the dentist can see are all configured per lab by the Dentrist team. Ask Dentrist support through Support chat to change them.

2. Getting started

2.1 Signing in

Open the lab portal address you received and sign in with your **email or username** and **password**. Click the eye icon in the password field to show what you typed. The ع **/ EN** button in the top corner switches the sign-in page between Arabic and English.



The sign-in page of the lab portal. Dentists use the same page.

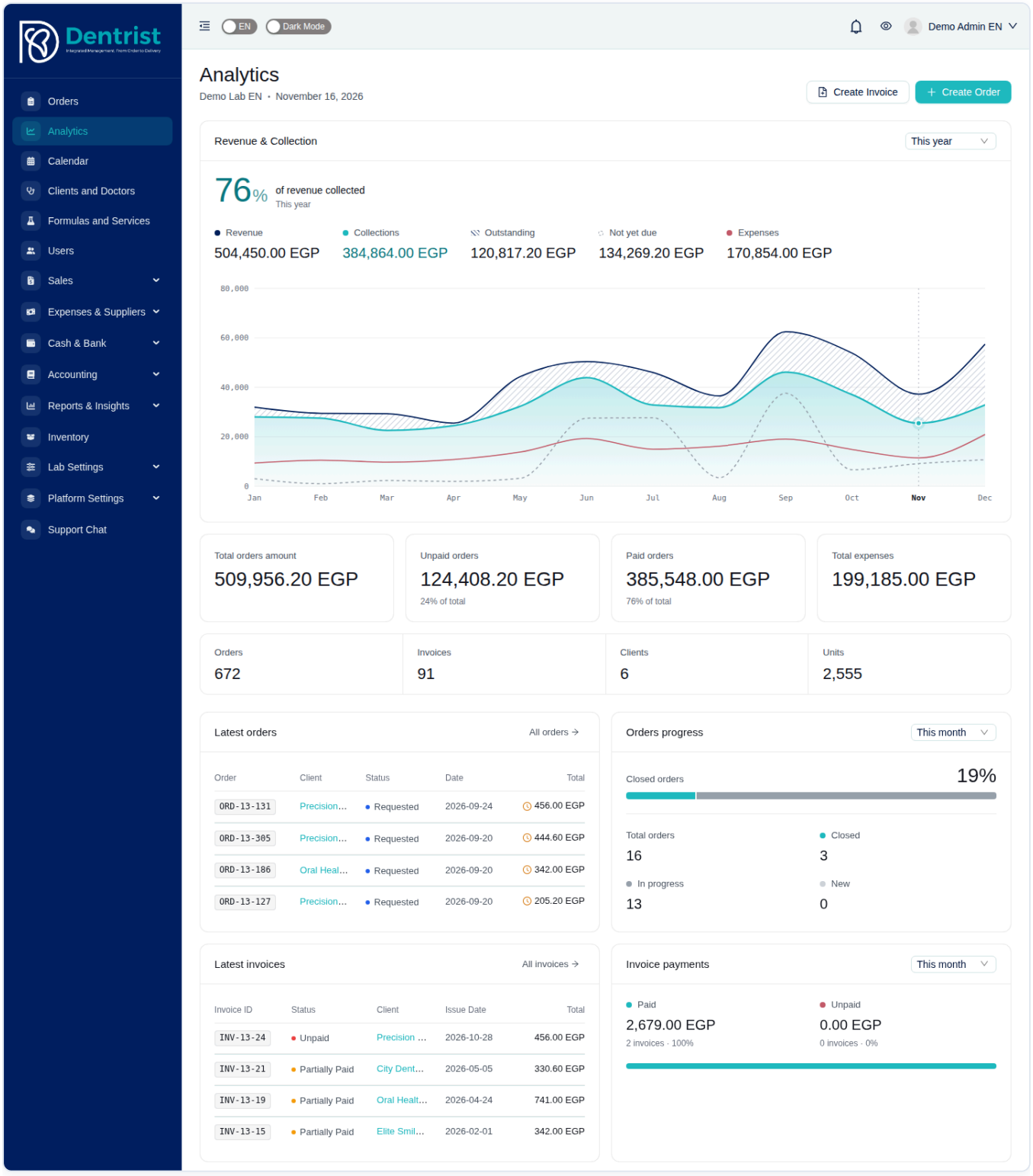
If you forgot your password, click **Forgot password?** and follow the instructions. If your account has no email, the page shows how to contact your lab admin instead.

2.2 The screen layout

After signing in you land on your workspace. Every page has the same three areas:

- **Sidebar (left).** The main menu. Items with an arrow open a group of pages. The menu only shows the pages your role can use. Click the ☰ icon at the top to collapse or expand it.
- **Top bar.**
  - **EN / AR** switch: changes the language of the whole system. Arabic switches the layout to right-to-left.
  - **Dark Mode** switch: changes between light and dark theme.
  - **Bell:** your notifications (for example, when someone mentions you in an order chat).
  - **Eye:** shows or hides prices on screen. Useful when a client is looking at your screen.
  - **Your name:** opens a menu with **Profile**, **System tour** and **Log out**.

- **Page content (center).** Most pages start with a header card (title, count and the main action buttons), then a **Filters** card, then the list or form.



The lab portal: sidebar on the left, top bar with language, theme, notifications, price visibility and the user menu.

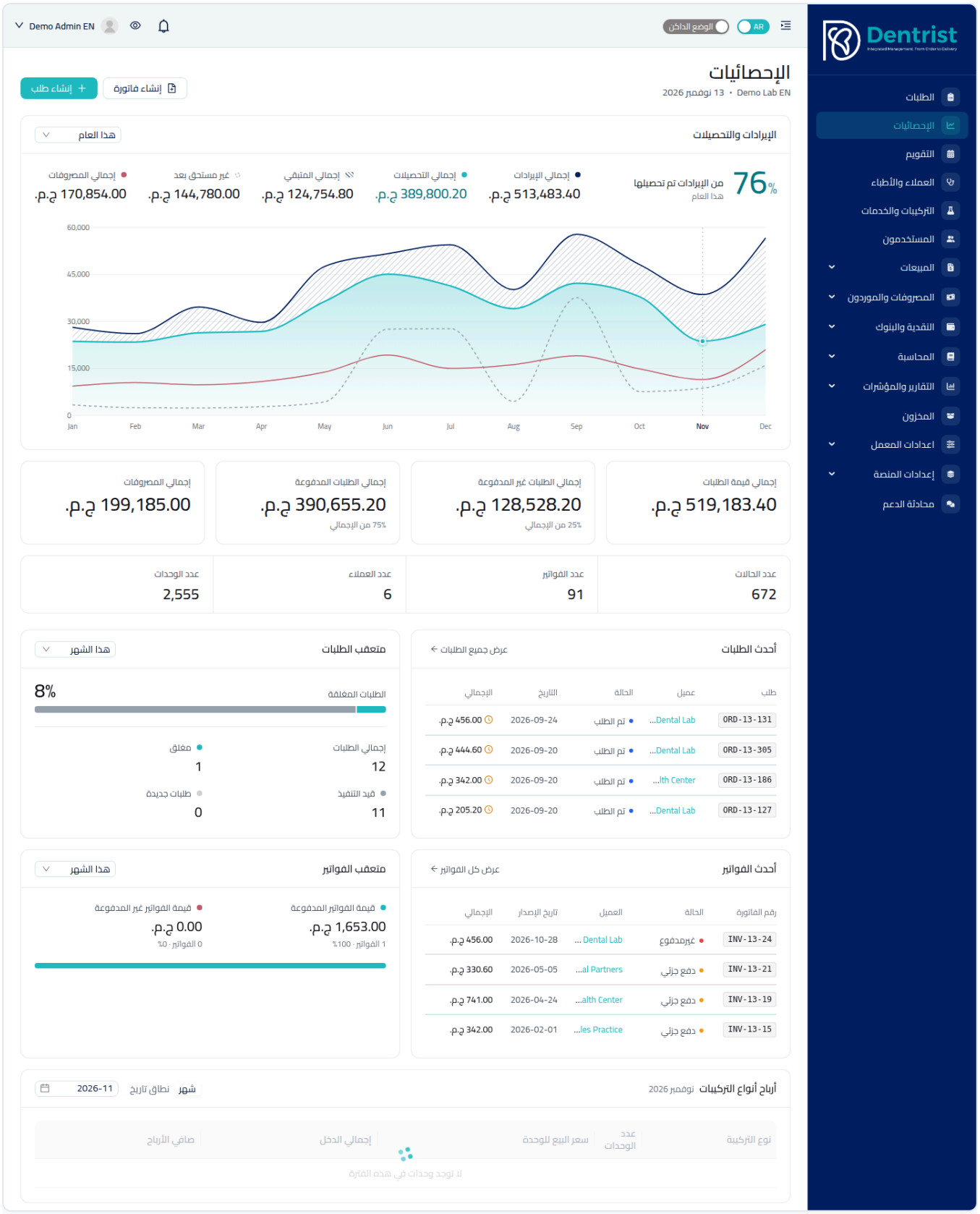
The full sidebar of a lab admin contains:

Menu	What you find there
Orders	All orders, create order

Menu	What you find there
Analytics	The dashboard
Calendar	Orders and invoices on a calendar
Clients and Doctors	Clinics, their dentists, prices, wallets and statements
Formulas and Services	The products and services you sell, with prices and costs
Users	Staff accounts and roles
Sales	Invoices, Discount Settings
Expenses and Suppliers	Expenses, Expense Types, Suppliers, Supplier Bills, Technician Settlements, Salaries
Cash and Bank	Cash and Bank accounts, Bank Reconciliation, Payment Settings
Accounting	Chart of Accounts, Journal Entries, Fixed Assets, Period Close, Tax
Reports and Insights	Revenue Report, Collection Report, Transactions, Financial Reports, Aging Reports, Lab Costing, Financial Insights
Inventory	Stock items, movements, stock counts and valuation
Lab Settings	Lab information, Delivery Settings, Vacations, Branches
Platform Settings	Colors, Activities, Notification Settings, Subscription
Support Chat	Chat with the Dentrist support team

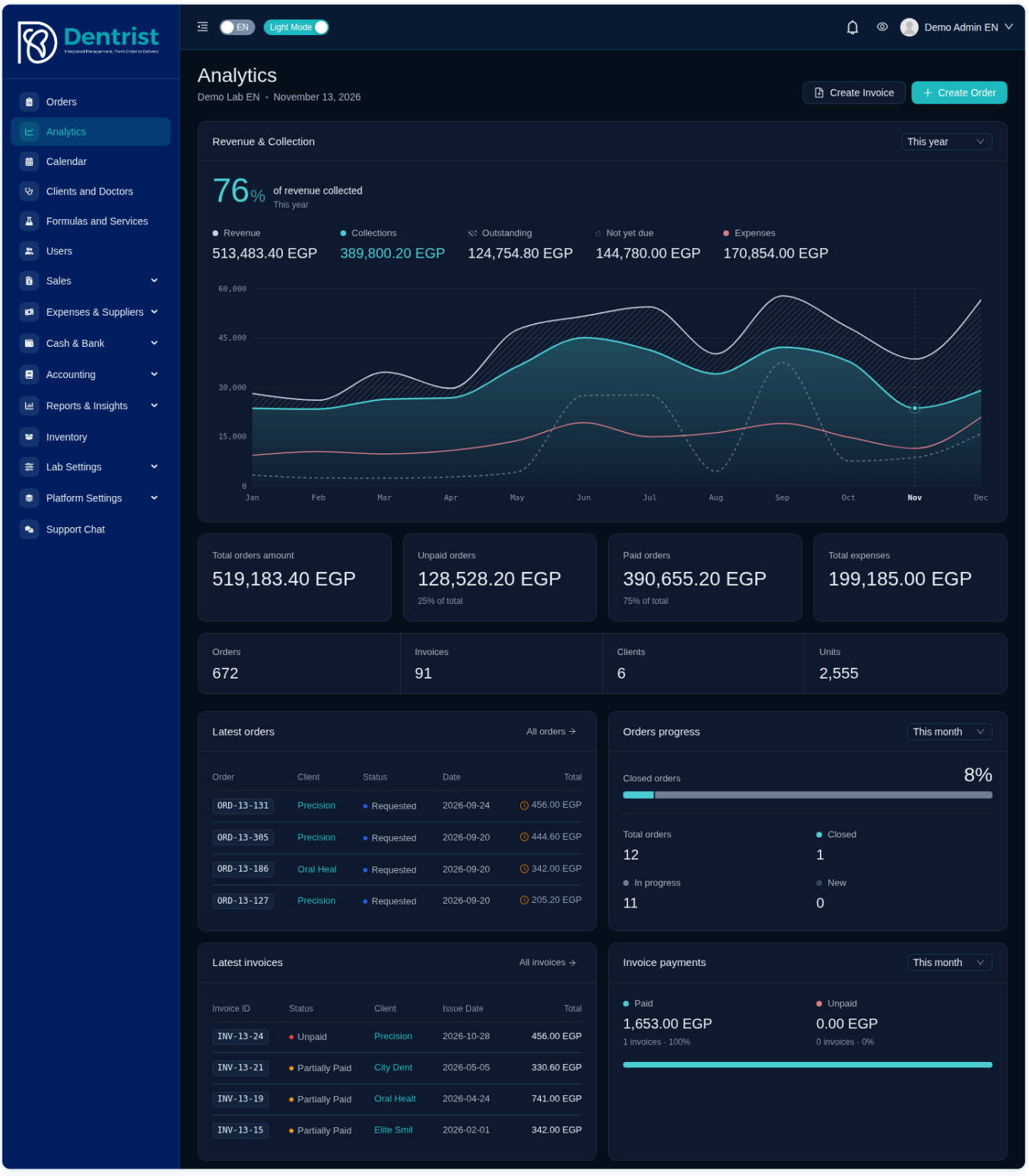
2.3 Language and theme

Dentrist is fully bilingual. Click **EN / AR** in the top bar to switch. Your choice is saved to your account, so the system opens in the same language next time, and emails and PDFs follow it.



The same dashboard in Arabic, with the right-to-left layout.

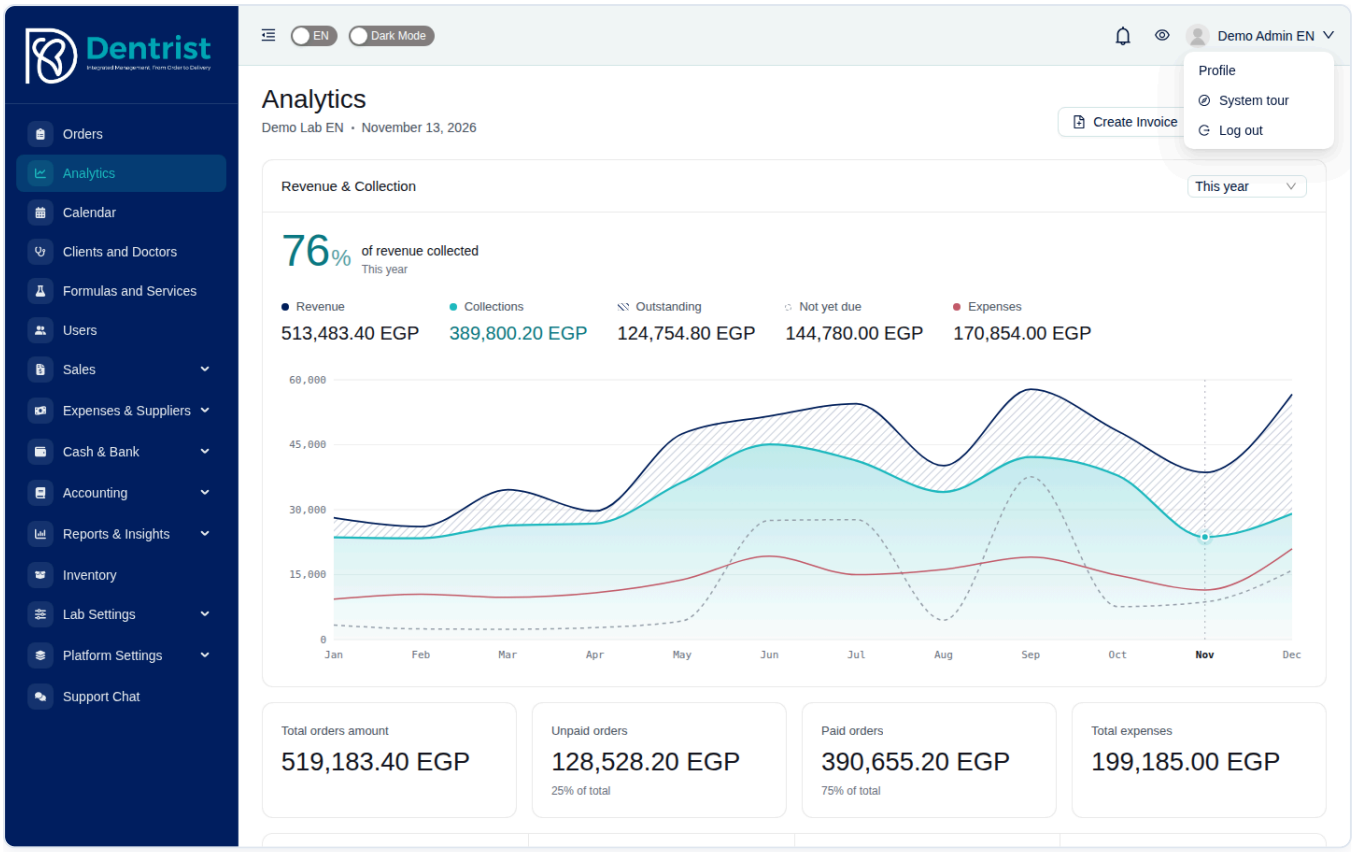
Click **Dark Mode** for a dark theme, which is easier on the eyes in a dim lab.



Dark mode.

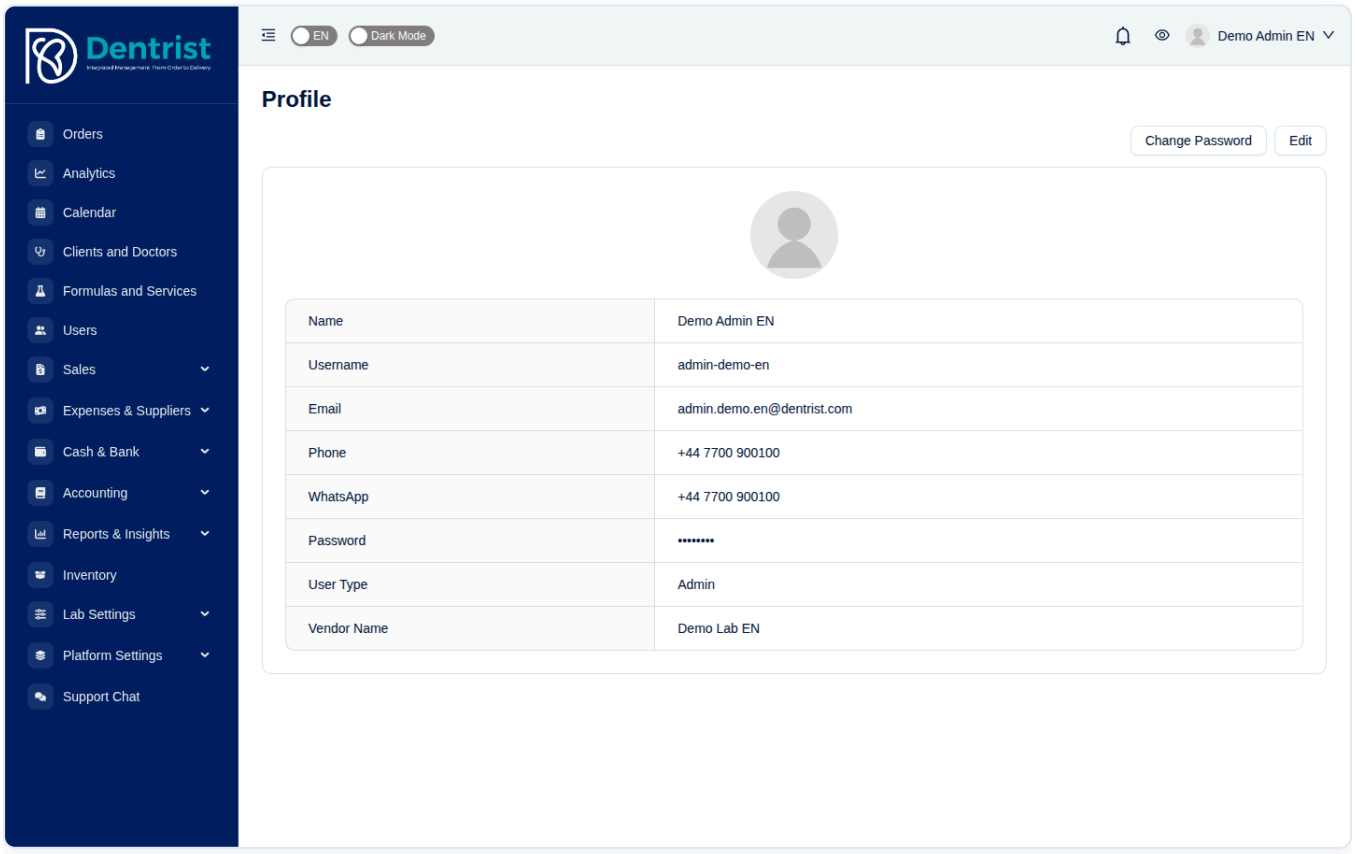
2.4 The guided tour and your profile

The first time you sign in, a short **guided tour** introduces the main navigation, the language and theme controls, your account menu, the workspace and the system pages. You can skip it at any time and replay it later from your name in the top bar → **System tour**.



The user menu: Profile, System tour and Log out.

Profile shows your name, username, email, phone, WhatsApp, user type and lab. Use **Edit** to change your details and photo, and **Change Password** to set a new password.

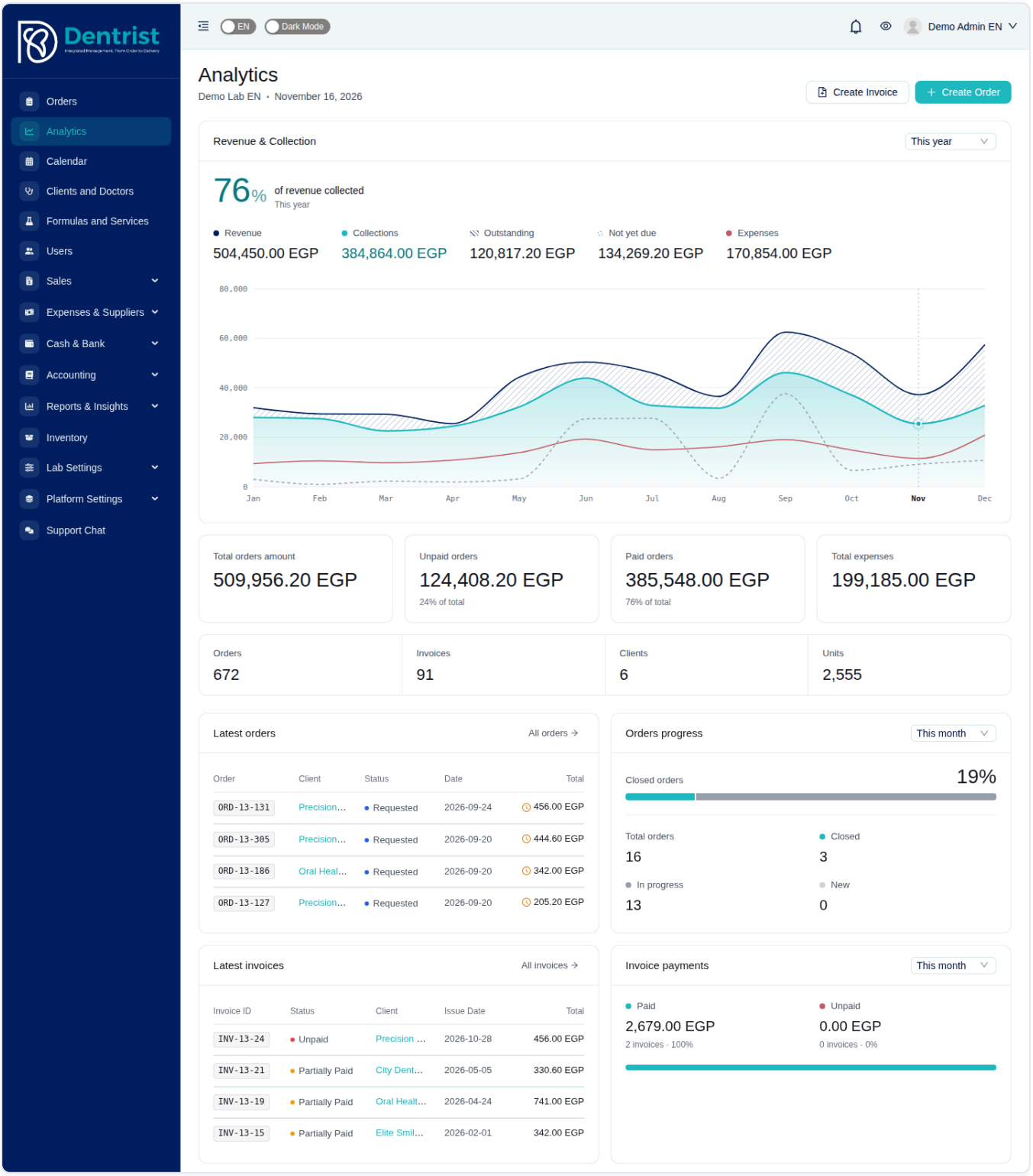


Your profile.

3. Dashboard

Menu: Analytics

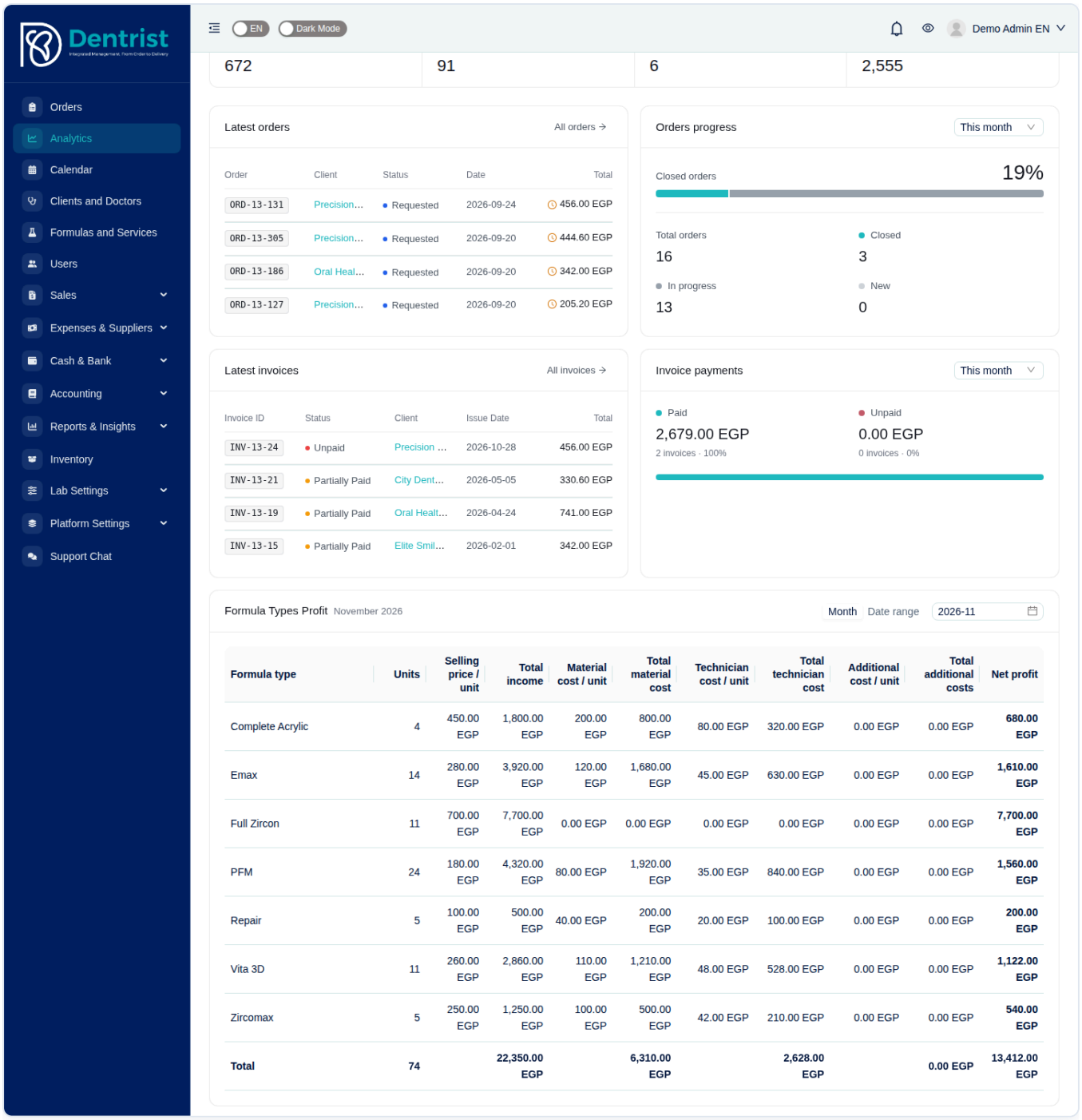
The dashboard (the **Analytics** page) is the lab owner's control panel. It summarizes the lab's activity for the selected period. Use the period selector on each card (for example **This year**, **This month** or a custom range) to change it.



The dashboard: the Revenue and Collection chart with the collection rate, and the KPI cards below it.

What you see, from top to bottom:

1. **Header:** the lab name, today's date and the **Create Invoice** and **Create Order** shortcuts.
2. **Revenue and Collection:** the share of revenue already collected in the period (for example *76% of revenue collected*), five totals and a month-by-month chart of them:
   - **Revenue:** the amount of orders that became billable in the period.
   - **Collections:** the money actually received.
   - **Outstanding:** billable amounts not yet paid (the hatched area between the revenue and collection lines).
   - **Not yet due:** orders still in production, not yet billable.
   - **Expenses:** the lab's expenses in the period.
3. **KPI cards:** total orders amount, unpaid and paid orders (with their share of the total) and total expenses, then the number of orders, invoices, clients and units.
4. Further down:
   - **Latest orders** and **Latest invoices**, with links to the full lists.
   - **Orders progress:** the share of closed orders, and how many orders are closed, in progress or new in the period.
   - **Invoice payments:** paid and unpaid invoice amounts in the period.
   - **Formula Types Profit:** per formula type, the units sold, selling price, total, material, technician and additional costs, and net profit, by month or date range.
   - The latest formula types, the formula types tracker, the most active clients and activity charts for clients, orders, invoices and expenses.



Formula type	Units	Selling price / unit	Total income	Material cost / unit	Total material cost	Technician cost / unit	Total technician cost	Additional cost / unit	Total additional costs	Net profit
Complete Acrylic	4	450.00 EGP	1,800.00 EGP	200.00 EGP	800.00 EGP	80.00 EGP	320.00 EGP	0.00 EGP	0.00 EGP	**680.00 EGP**
Emax	14	280.00 EGP	3,920.00 EGP	120.00 EGP	1,680.00 EGP	45.00 EGP	630.00 EGP	0.00 EGP	0.00 EGP	**1,610.00 EGP**
Full Zircon	11	700.00 EGP	7,700.00 EGP	0.00 EGP	0.00 EGP	0.00 EGP	0.00 EGP	0.00 EGP	0.00 EGP	**7,700.00 EGP**
PFM	24	180.00 EGP	4,320.00 EGP	80.00 EGP	1,920.00 EGP	35.00 EGP	840.00 EGP	0.00 EGP	0.00 EGP	**1,560.00 EGP**
Repair	5	100.00 EGP	500.00 EGP	40.00 EGP	200.00 EGP	20.00 EGP	100.00 EGP	0.00 EGP	0.00 EGP	**200.00 EGP**
Vita 3D	11	260.00 EGP	2,860.00 EGP	110.00 EGP	1,210.00 EGP	48.00 EGP	528.00 EGP	0.00 EGP	0.00 EGP	**1,122.00 EGP**
Zircomax	5	250.00 EGP	1,250.00 EGP	100.00 EGP	500.00 EGP	42.00 EGP	210.00 EGP	0.00 EGP	0.00 EGP	**540.00 EGP**
Total	**74**		**22,350.00 EGP**		**6,310.00 EGP**		**2,628.00 EGP**		**0.00 EGP**	**13,412.00 EGP**

Lower part of the dashboard: latest orders and invoices, orders progress, invoice payments and formula type profit.

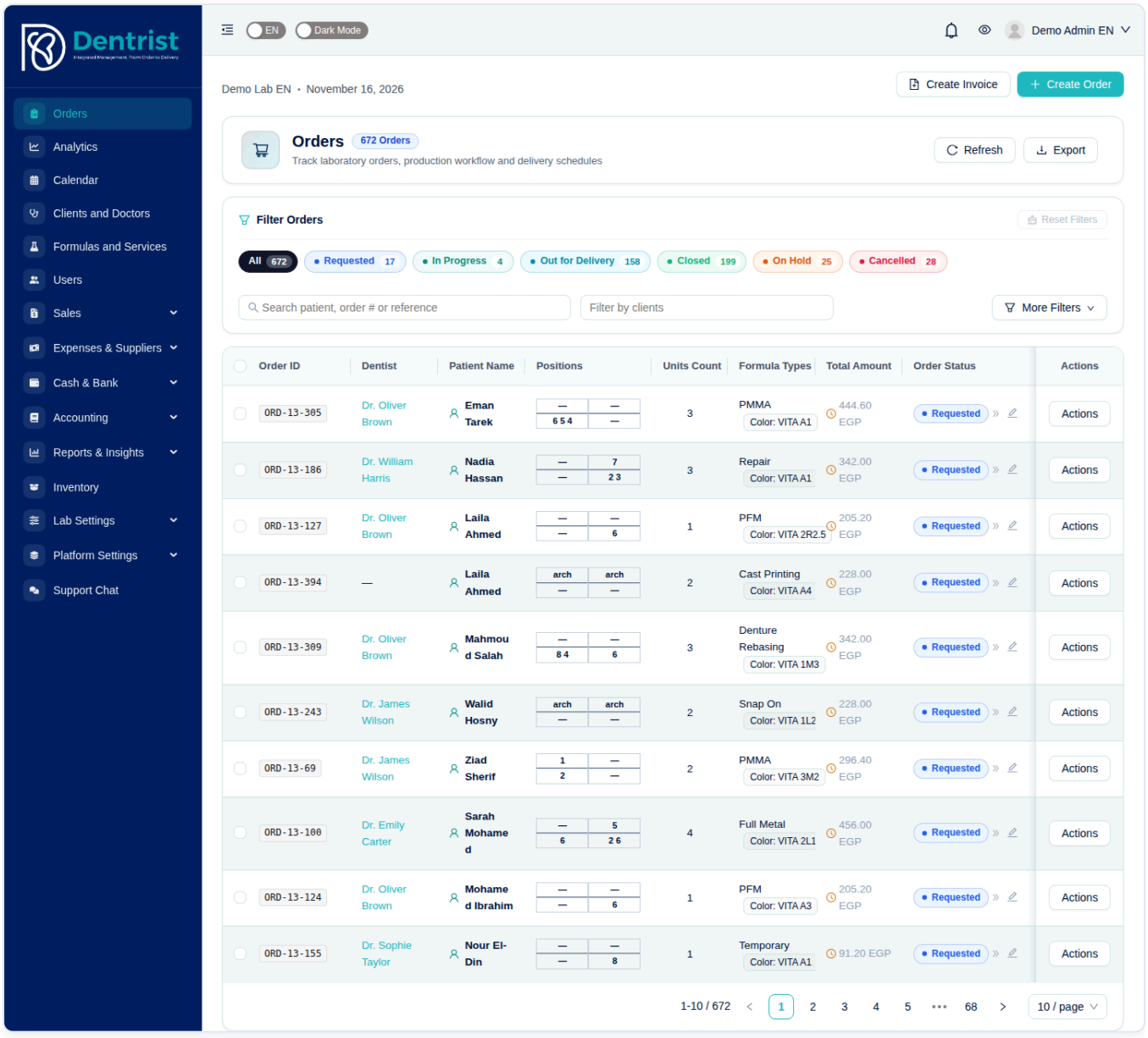
> **Note:** The dashboard is an operational view. For the books of record (profit and loss, balance sheet), use 12.4 Financial reports.

4. Orders

Menu: Orders

4.1 The orders list

The orders list shows every case in the lab, newest first.



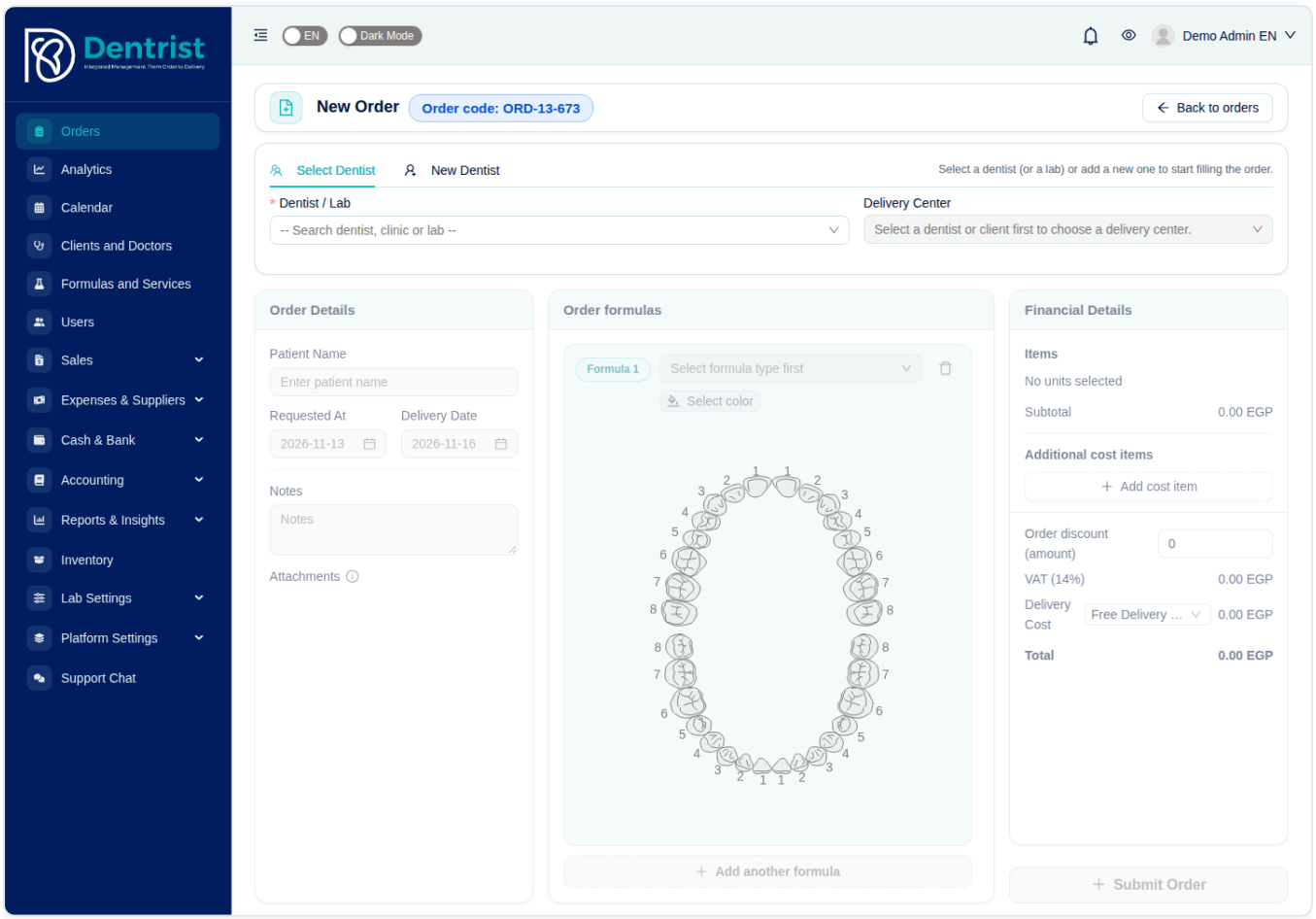
The orders list with status chips, filters and the table.

- **Status chips** at the top (All, Requested, In Progress, Out for Delivery, Closed, On Hold, Cancelled…) show how many orders are in each status. Click a chip to show only those orders.
- **Filters:** search by patient or order number, client, dentist, technician, courier, formula type, payment status, requested date range and paid date range. Tick **Remakes only** to list only remake orders. Your filters are remembered when you come back to the page. **Reset Filters** clears them.

- **Table columns:** order ID, dentist, patient, tooth positions, units count, formula types and shade, total amount, order status (click **Jump to status** to change it right from the list), requested date and actions.
- **Bulk actions:** tick several orders with the check boxes to change their status or perform other actions on all of them at once.
- **Export** downloads the list (with the current filters) to a file; **Refresh** reloads it.

4.2 Creating an order

Click **Create Order** (on the orders list, the dashboard banner or the header). The new order already has its order code (for example *ORD-13-673*).

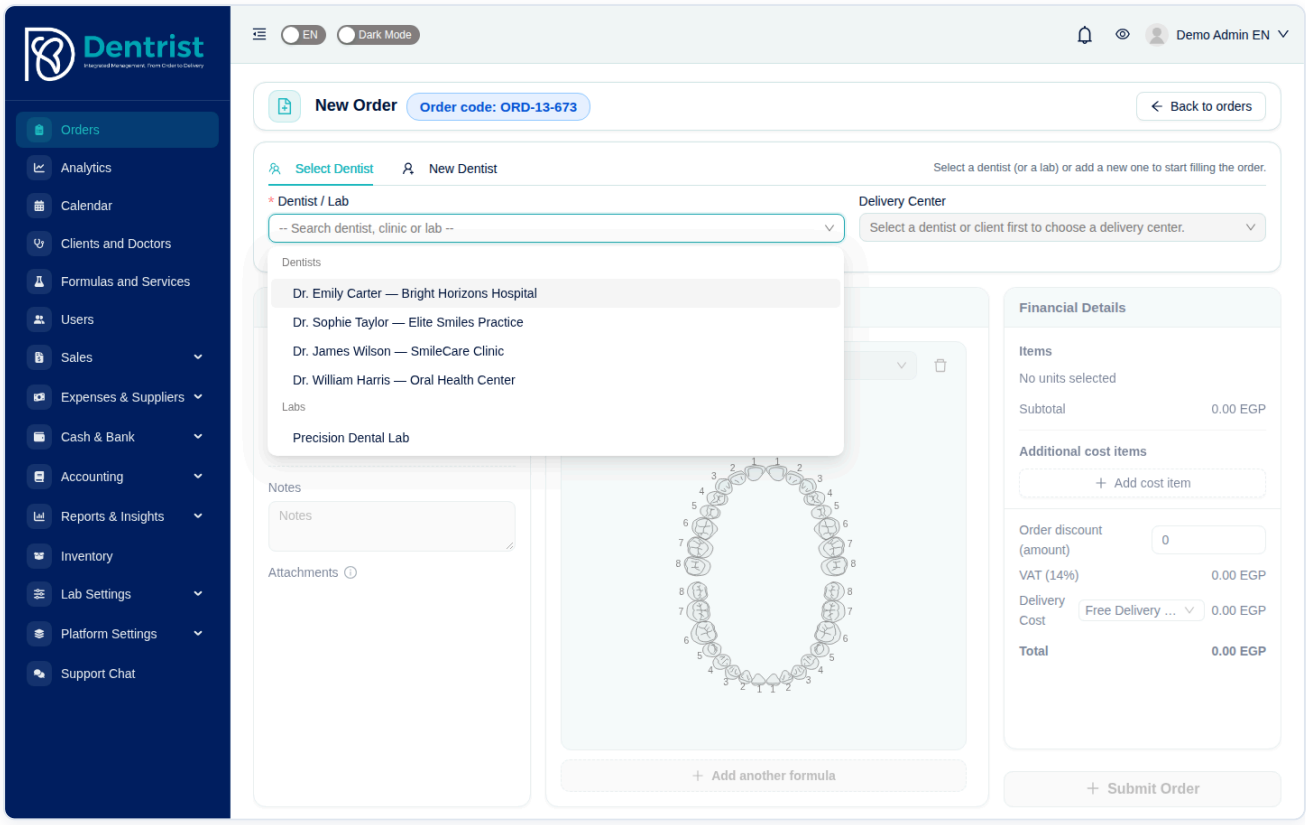


The create order form: who the order is for at the top, then order details, order formulas with the tooth chart, and the financial details. The rest of the form stays greyed out until you choose a dentist or lab.

Fill the form from top to bottom:

1. **Who the order is for.** The first card has two tabs:
    - **Select Dentist** (the default). Open the **Dentist / Lab** list and type part of a dentist, clinic or lab name. The list has two groups: **Dentists**, shown as *Dr. Name — Clinic*, and **Labs**, for partner labs that send you work. The clients who order most appear first. Choosing a dentist fills in both the dentist and their clinic (the client who pays for the order), so there is no separate client field.
    - **New Dentist**, for someone who is not in the system yet (see below).

Then choose the **Delivery Center** (where the case will be delivered). The list only shows the delivery centers of the selected clinic; **Add new** adds one on the spot.

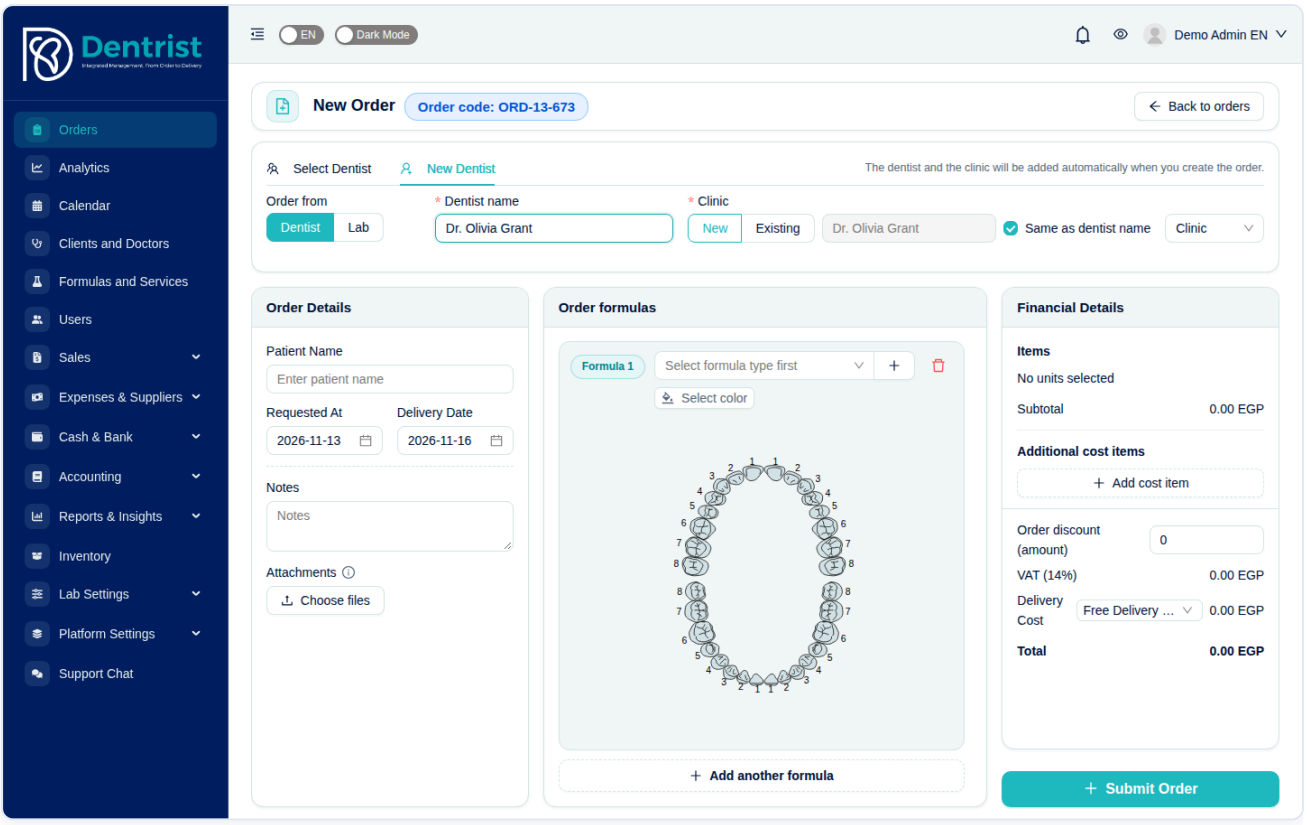


The Dentist / Lab list: dentists with their clinic, then partner labs.

Ordering for a new dentist or lab. Open the **New Dentist** tab and choose **Order from**:

- **Dentist:** type the **Dentist name** and choose the **Clinic**. With **New**, the clinic takes the dentist's name while **Same as dentist name** is ticked; untick it to type a different name, and choose **Clinic** or **Hospital**. With **Existing**, pick one of your current clients.
- **Lab:** type the **Lab name**.

Nothing is saved yet. The dentist and the clinic (or the lab) are created together with the order when you click **Submit Order**, and the new dentist is then selected in the **Select Dentist** tab.



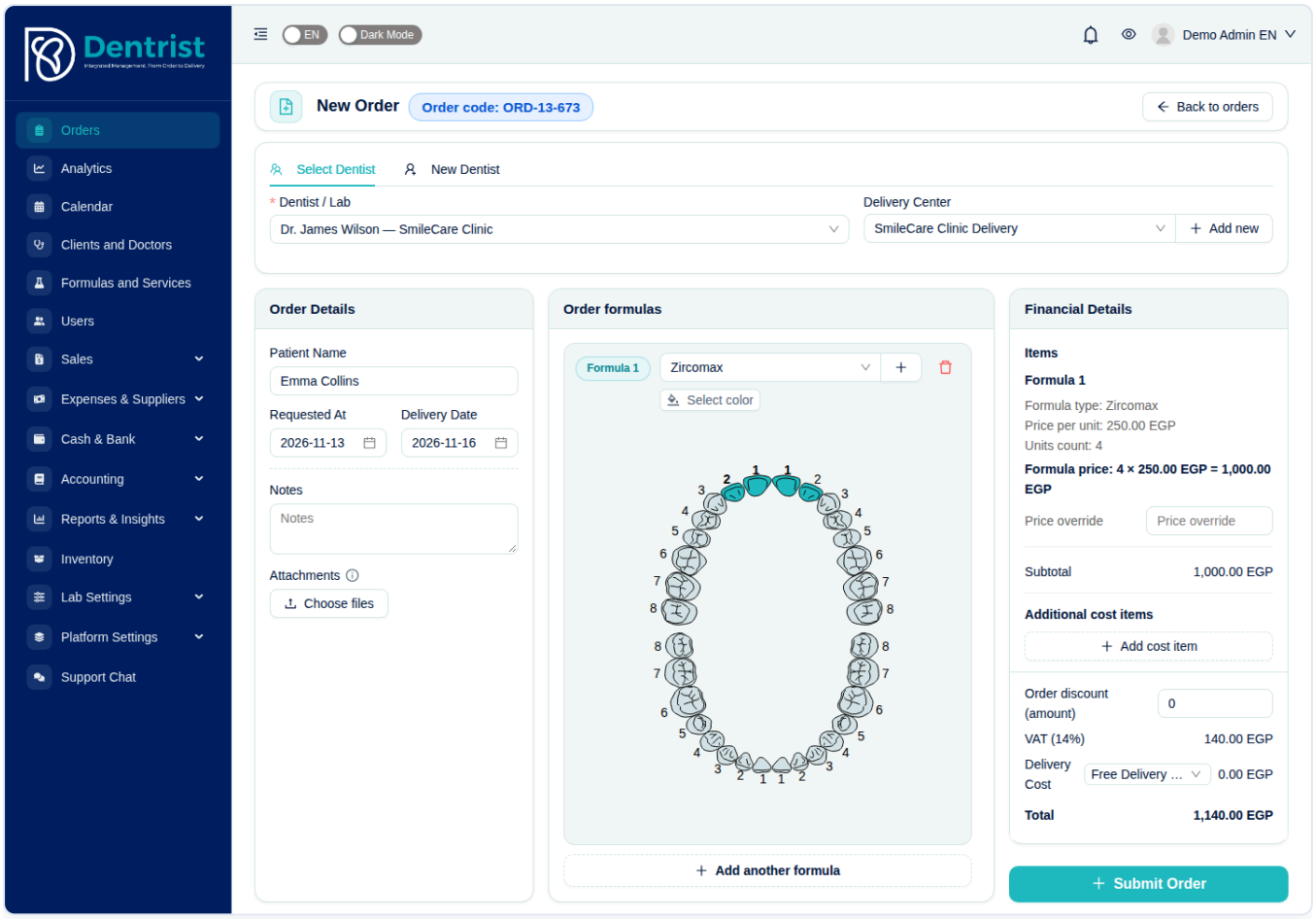
The New Dentist tab: a new dentist with a new clinic of the same name.

2. **Order Details.** Enter the **Patient Name**. **Requested At** defaults to today and **Delivery Date** is suggested from the lab's working days and vacations; change them if needed. Add **Notes** and **Attachments** (photos, scans, PDFs) if you have them.

3. **Order formulas.** For each product:
    1. Choose the **formula type** (for example *Zircomax*, *Emax*, *PFM*). The **+** button next to it adds a new formula type without leaving the order. If the chosen type has no selling price yet, Dentrist asks you to set one so the order is priced correctly.
    2. Click **Select color** and choose the shade (for example *VITA A2*).
    3. Click the teeth on the **FDI tooth chart**. Each selected tooth is one unit. Click a tooth again to remove it.
    4. Click **Add another formula** for a second product on the same case (for example crowns on the upper arch and a night guard).

4. **Financial Details.** This panel updates live as you work:
    - **Items:** each formula with its unit price, number of units and formula price, and the **Subtotal**. Type a **Price override** to charge a different unit price for this order only.
    - **Additional cost items:** click **Add cost item** for extras such as shade matching or a custom abutment, with a description and an amount.
    - **Order discount (amount):** a discount on the whole order.
    - **VAT** at your lab's rate, and the **Delivery Cost** from the chosen delivery type.
    - **Total:** what the client will owe.

5. Click **Submit Order**. A confirmation appears with a link to open the new order.

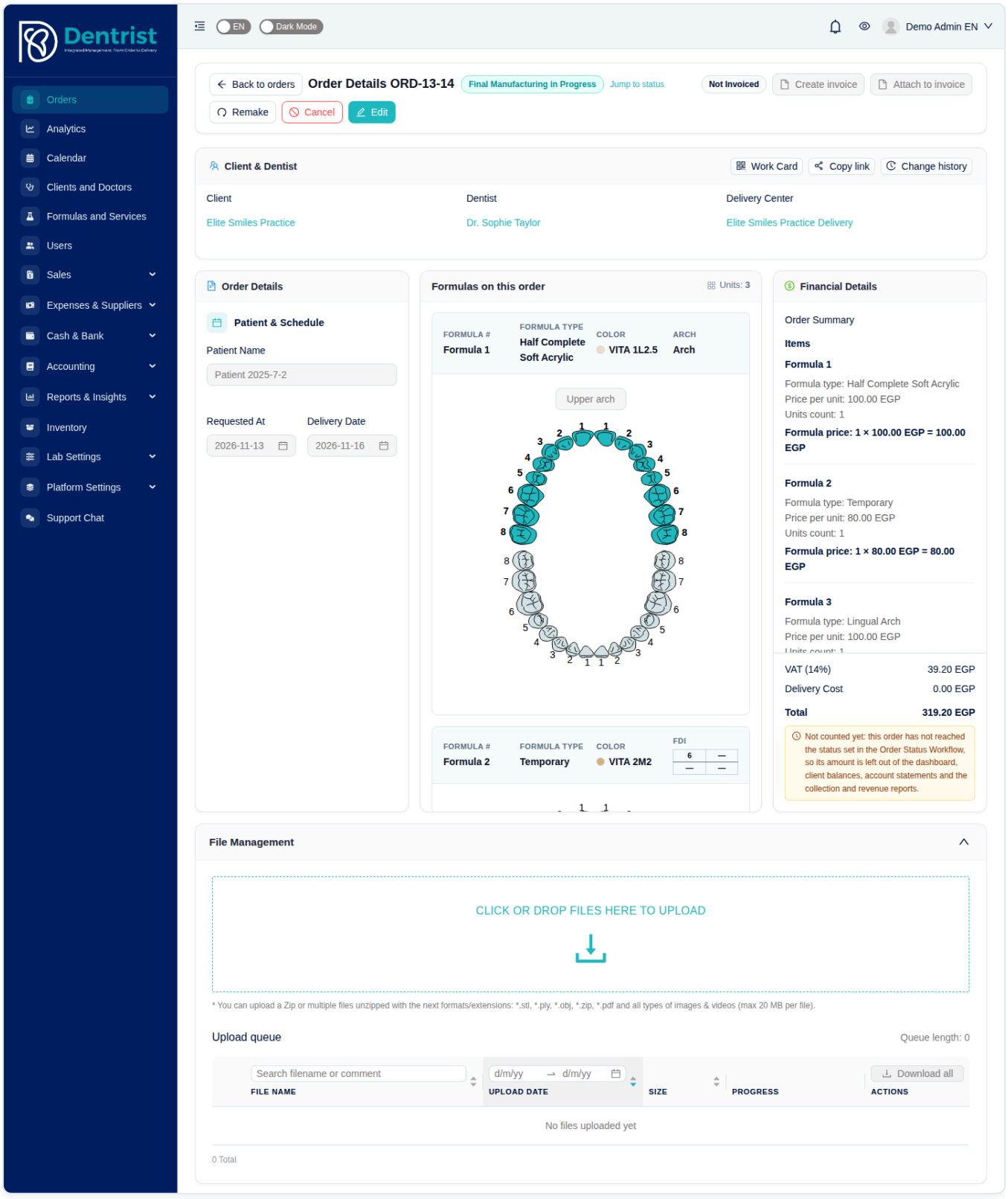


A filled order: Dr. James Wilson of SmileCare Clinic, four Zircomax units (teeth 12, 11, 21, 22) at 250 EGP, 14% VAT and free delivery, for a total of 1,140 EGP.

> **How the total is calculated:** units × unit price, minus the order discount, plus additional cost items, gives the net amount. VAT is added on the net amount, then the delivery cost (delivery is not taxed). If the client has a **custom price** for the formula type, that price is used instead of the catalog price (see 5.5 Custom prices).

4.3 The order page

Click an order code anywhere in the system to open its page.



The order page: header actions, client and dentist, order details, formulas on the tooth chart, and the financial summary.

The header shows the order code, its status and whether it is already on an invoice (**Not invoiced** or the invoice code). **Work Card**, **Copy link** and **Change history** sit on the **Client and Dentist** card just below. The actions are:

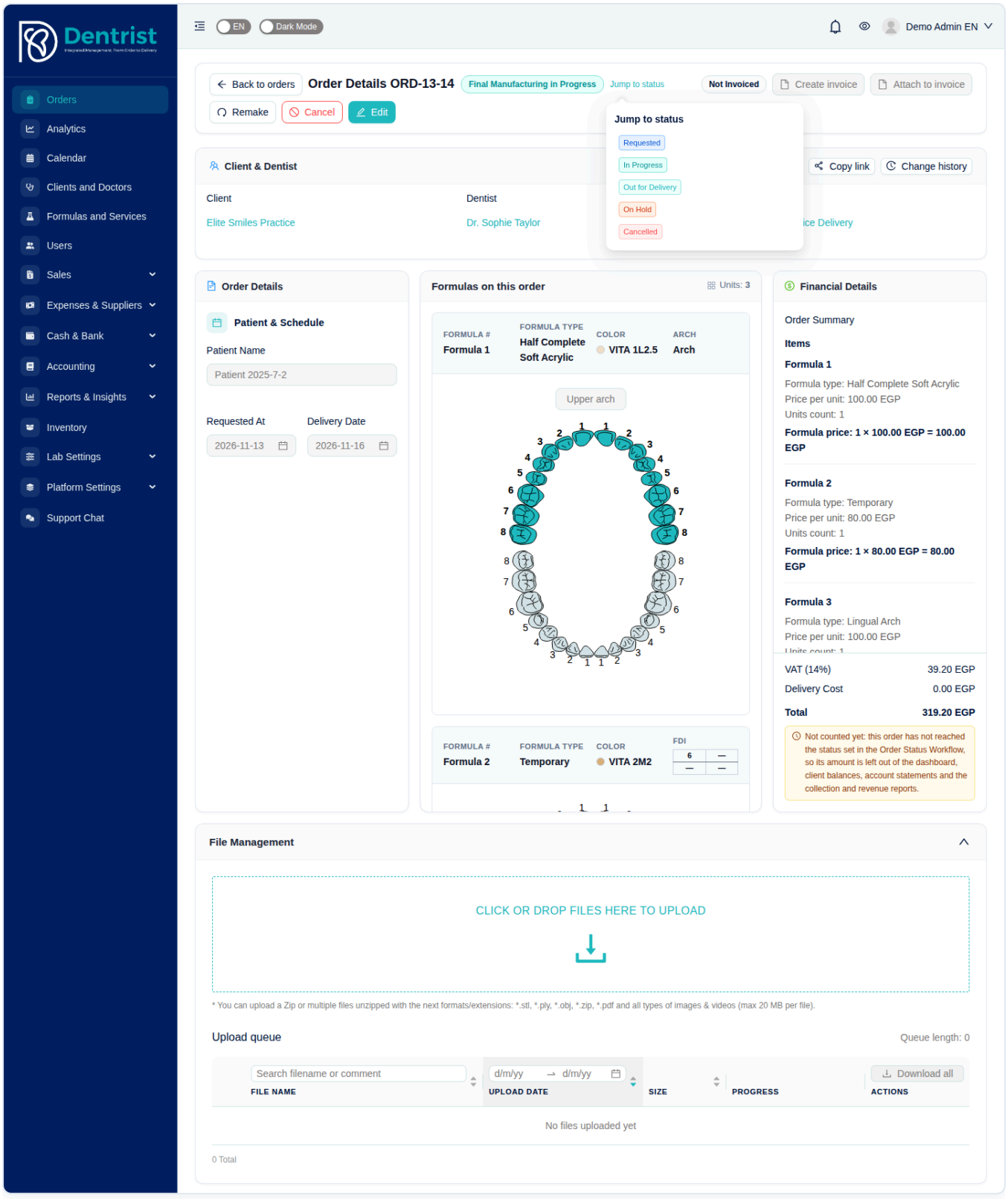
Button	What it does
Jump to status	Move the order to another status (see 4.4)
Create invoice	Create a new invoice from this order (only once the order is billable)
Attach to invoice	Add the order to an existing open invoice of the same client
Remake	Create a remake of this order, with a reason. Remakes are tracked for cost and quality reports
Cancel	Cancel the order
Edit	Change the order. Orders lock once they reach the billable status
Work Card	Print the job ticket that travels with the case on the bench
Copy link	Copy a public link to the order to share with the dentist
Change history	See every change made to the order (see 4.8)

The cards below show:

- **Client and Dentist:** the client, dentist (or lab contact) and delivery center.
- **Order Details:** patient name, requested and delivery dates, and notes.
- **Formulas on this order:** each formula with its type, shade and the selected teeth highlighted on the chart. Switch between **Upper arch** and **Lower arch** when needed.
- **Financial Details:** the order summary with prices, VAT, delivery and total. A yellow note tells you when the order has not reached the billable status yet and is therefore not counted in revenue and client balances.

4.4 Changing the order status

The current status is shown next to the order code. Click **Jump to status** beside it (on the order page or in the orders list) and click the new status in the popup. The statuses offered, and their order, come from your lab's **order status workflow**.



The Jump to status popup lists the statuses the order can move to.

What happens automatically when the status changes:

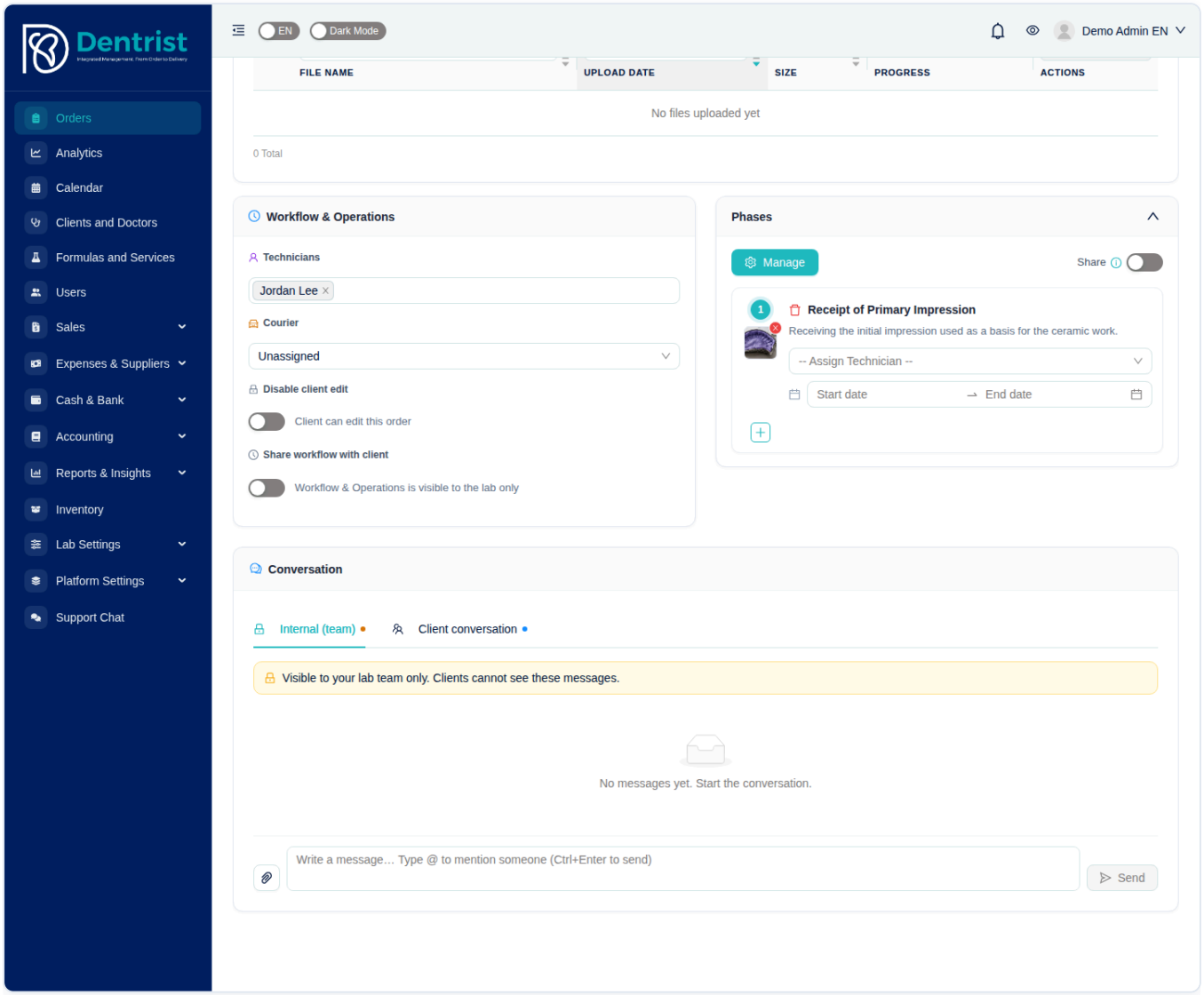
- **Leaving *Requested*** (the case goes to the bench): Dentrist records the production costs of each unit (material, technician and additional costs from the formula type).
- **Reaching the billable status** (usually *Out for Delivery*): the order amount becomes owed by the client, counts in revenue and reports, appears in the client's account statement, can be invoiced, and is locked

against editing.

- **Moving back** before the billable status reverses the revenue, and the order becomes editable again.
- **Paid** orders move to *Closed* when their invoice is fully paid.
- The dentist and anyone who chose to be notified receive a notification.

4.5 Production: technicians, courier and phases

Scroll down the order page to the **Workflow and Operations** and **Phases** cards.



Assign technicians and a courier, control what the client can do and see, and follow production phase by phase.

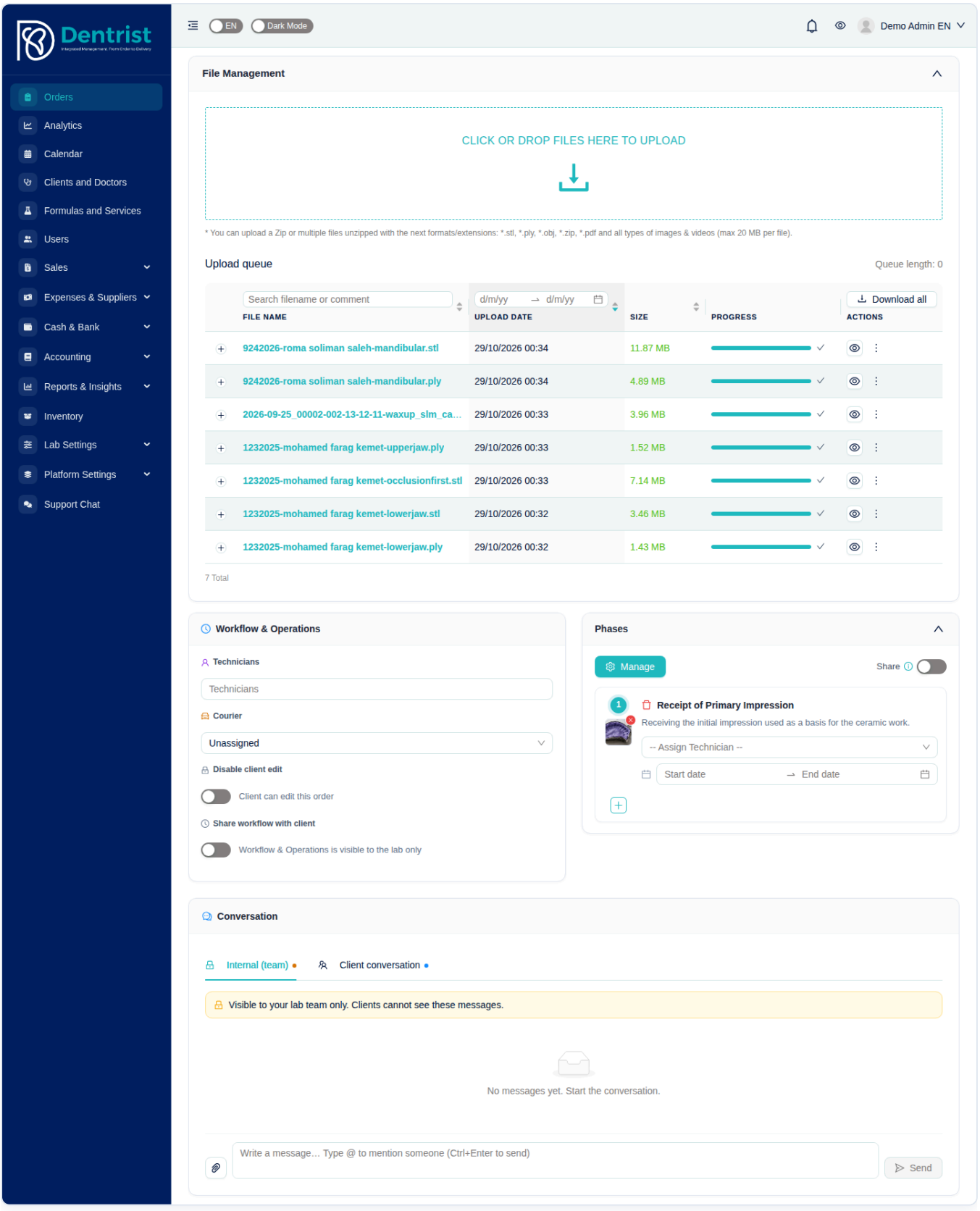
Workflow and Operations:

- **Technicians:** assign one or more technicians. They see the order in their own list and are paid for it through technician settlements.
- **Courier:** assign the courier who will deliver the case.
- **Disable client edit:** stop the dentist from editing the order from the dentist portal.
- **Share workflow with client:** let the dentist see the workflow and operations details in the portal.

Phases list the production steps of the case (for example Receipt of Primary Impression, Model, Design, Waxing, Casting, Finishing, Send for Trial Fitting). For each phase you can assign a technician and set a start and end date. Click **Manage** to add, remove or reorder phases. Turn on **Share** to let the dentist follow the phases from the portal.

4.6 Files and the 3D viewer

The **File Management** card stores everything related to the case: intraoral scans, STL, PLY and OBJ models, ZIP files, photos, videos and PDFs (up to 20 MB per file).



Drag and drop files into the upload area. Each file shows its upload date, size and progress.

- **Upload:** drag files onto the area or click it to choose files. You can upload a ZIP or several files at once.
- **Search** by file name or comment and filter by upload date.
- **Download all** downloads every file of the order.

- Click the **eye** icon to preview a file. 3D files (STL, PLY, OBJ) open in the built-in **3D viewer**, where you can rotate, zoom and pan the model with the mouse. No CAD software is needed.



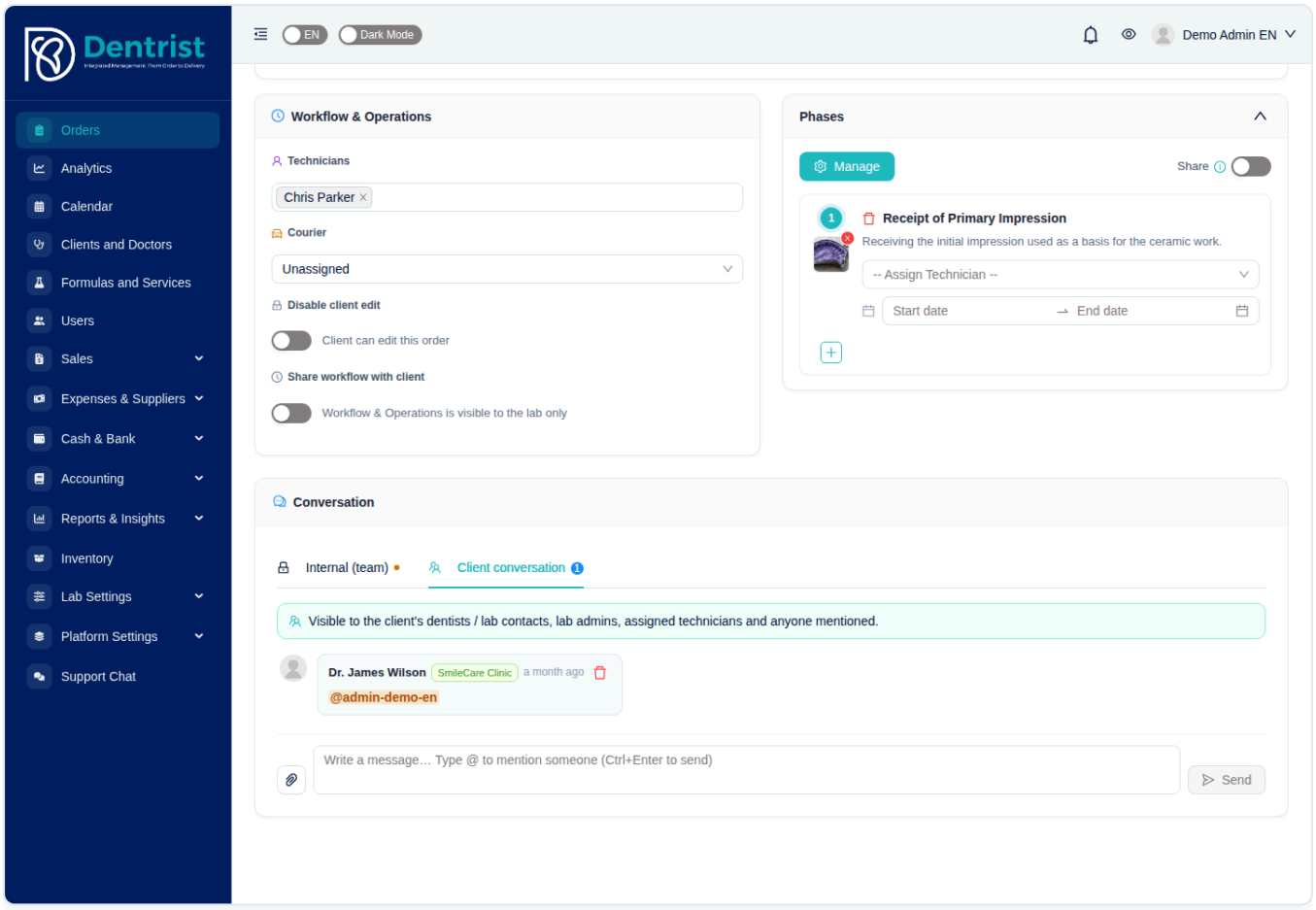
An intraoral scan opened in the 3D viewer.

4.7 Conversation

At the bottom of the order page, the **Conversation** card keeps all discussion about the case in one place, with two tabs:

- **Internal (team):** visible to your lab team only. Clients never see these messages.
- **Client conversation:** shared with the dentist, who sees it in the dentist portal.

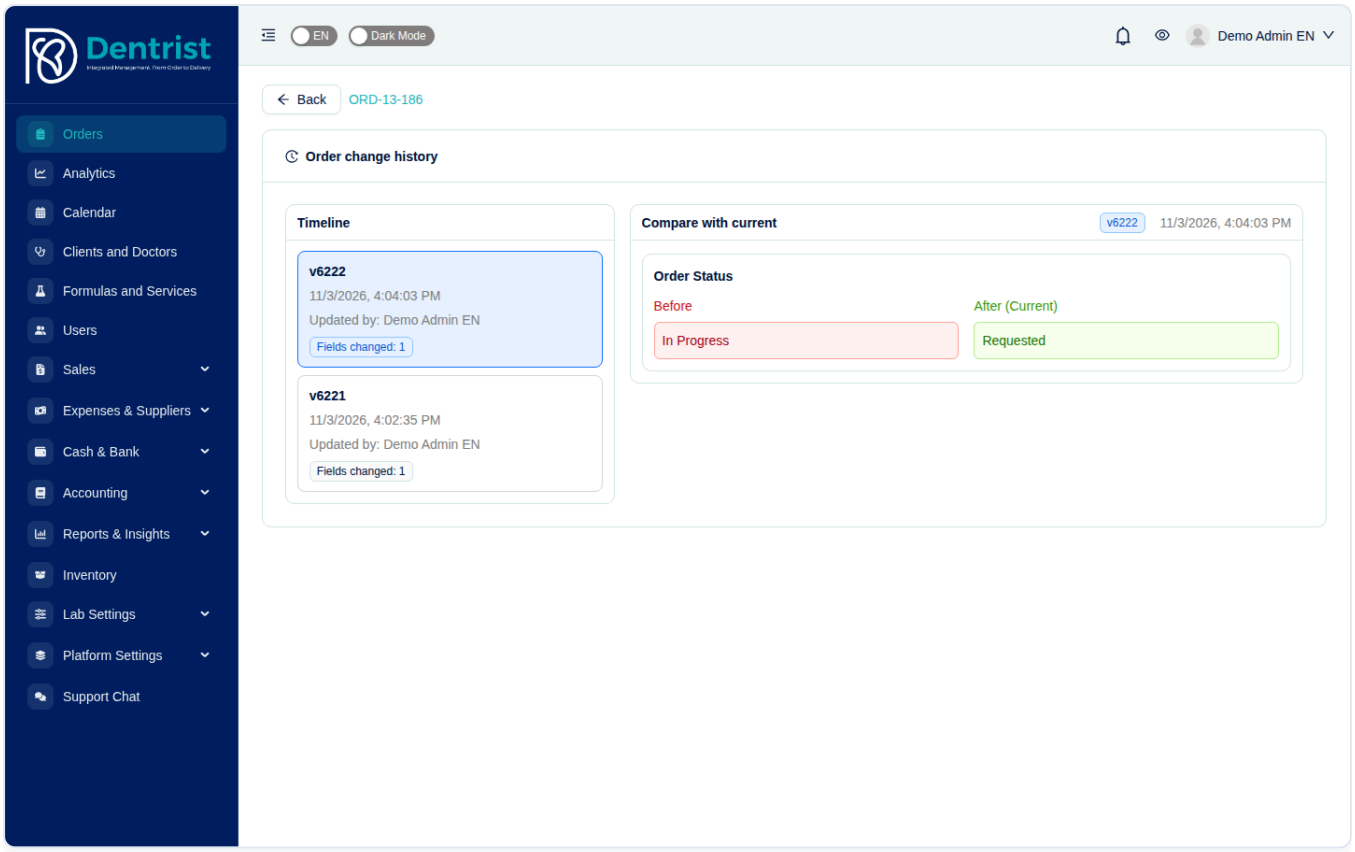
Type @ followed by a name to mention a colleague or the dentist; they get a notification. You can attach files to messages. Press **Ctrl+Enter** to send.



The order conversation with internal and client tabs.

4.8 Change history

Every change to an order (status, units, prices, dates, assignments) is recorded. Click **Change history** on the order page to see who changed what and when, with the old and new values.

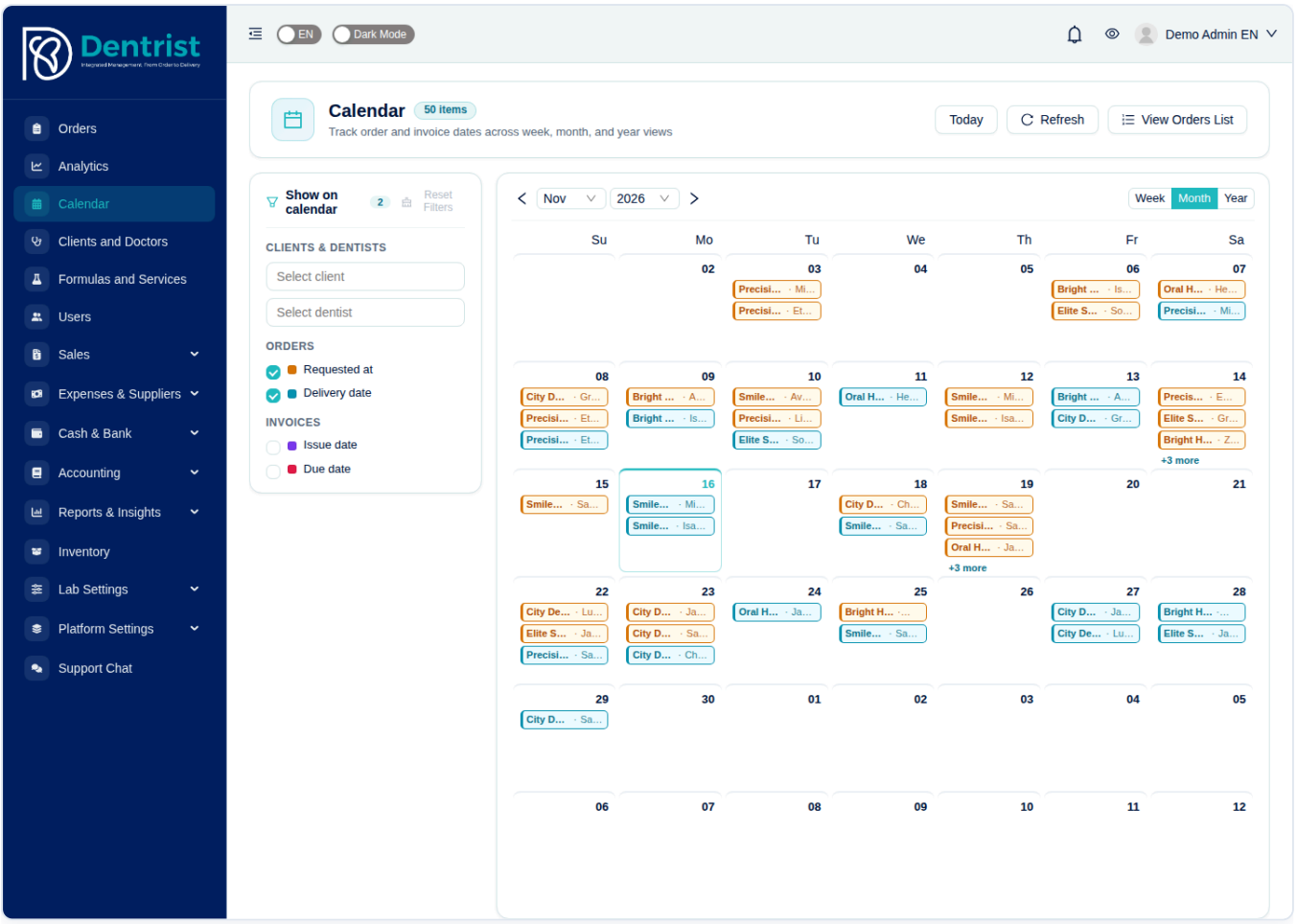


The change history of an order.

4.9 Calendar

Menu: Calendar

The calendar shows orders by **requested date** and **delivery date**, and optionally invoices by **issue date** and **due date**. Switch between **Week**, **Month** and **Year** views, and use the arrows or **Today** to move in time. Filter by client and dentist in the left panel. Weekends and lab vacations (see 13.3) are highlighted. Click any item to open it.



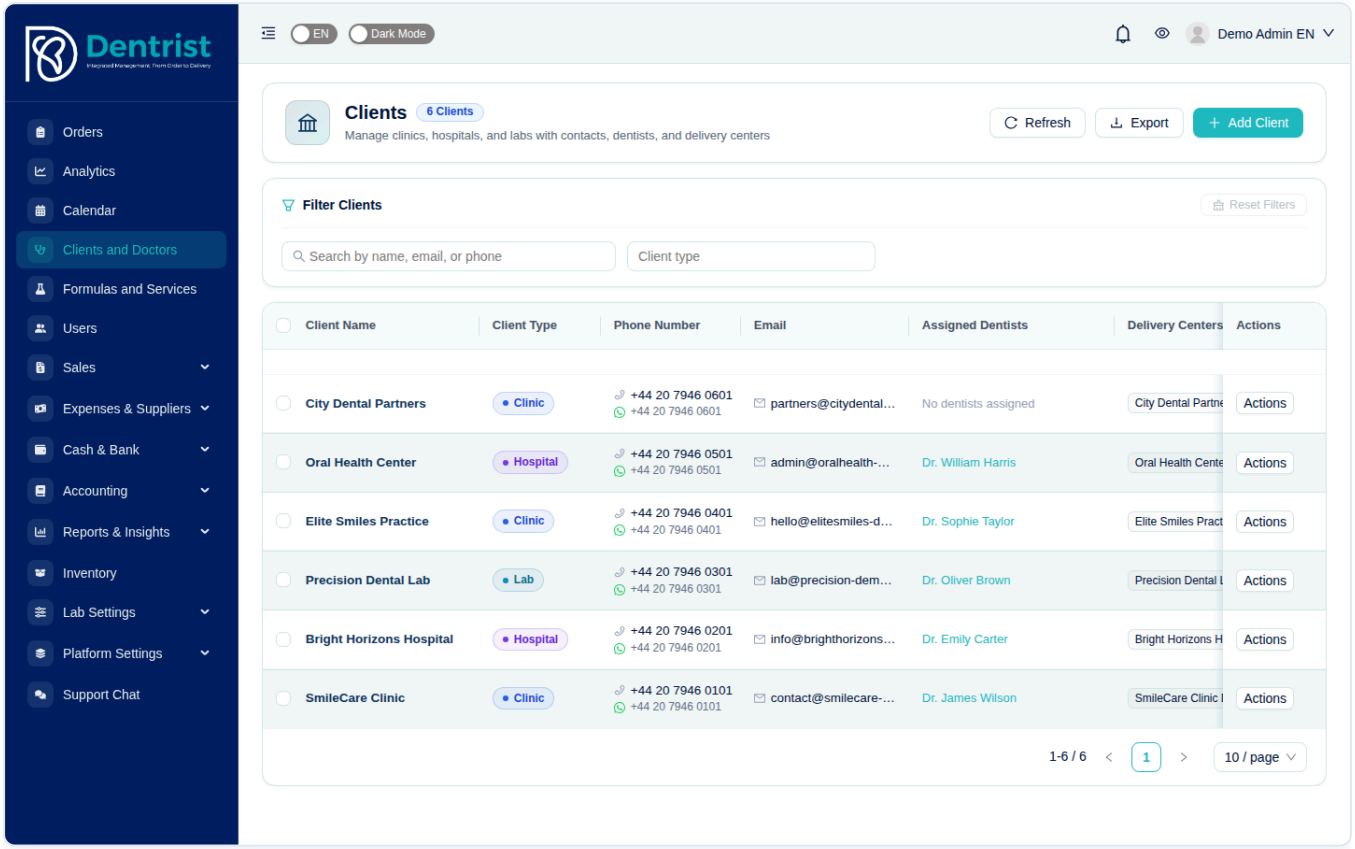
The calendar in month view: orange items are requested dates, blue items are delivery dates.

5. Clients and dentists

Menu: Clients and Doctors

A **client** is the clinic, hospital or partner lab that orders from you and pays you. Each client can have several **dentists** and **delivery centers**.

5.1 The clients list

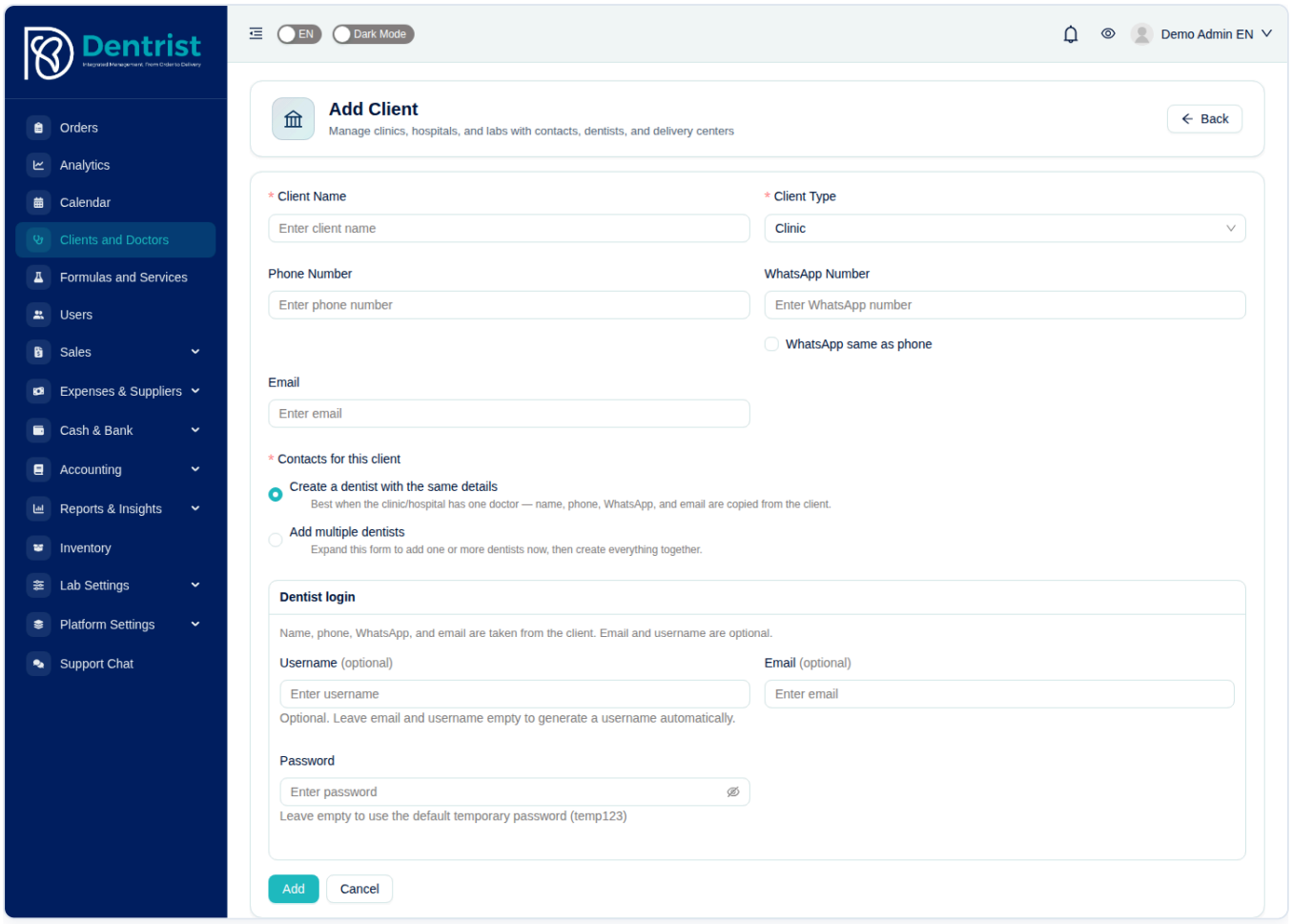


All clients with their type, contacts, assigned dentists and delivery centers.

Search by name, email or phone, and filter by client type (Clinic, Hospital, Lab). Use **Actions** on a row to view, edit or delete a client. **Export** downloads the list.

5.2 Adding a client

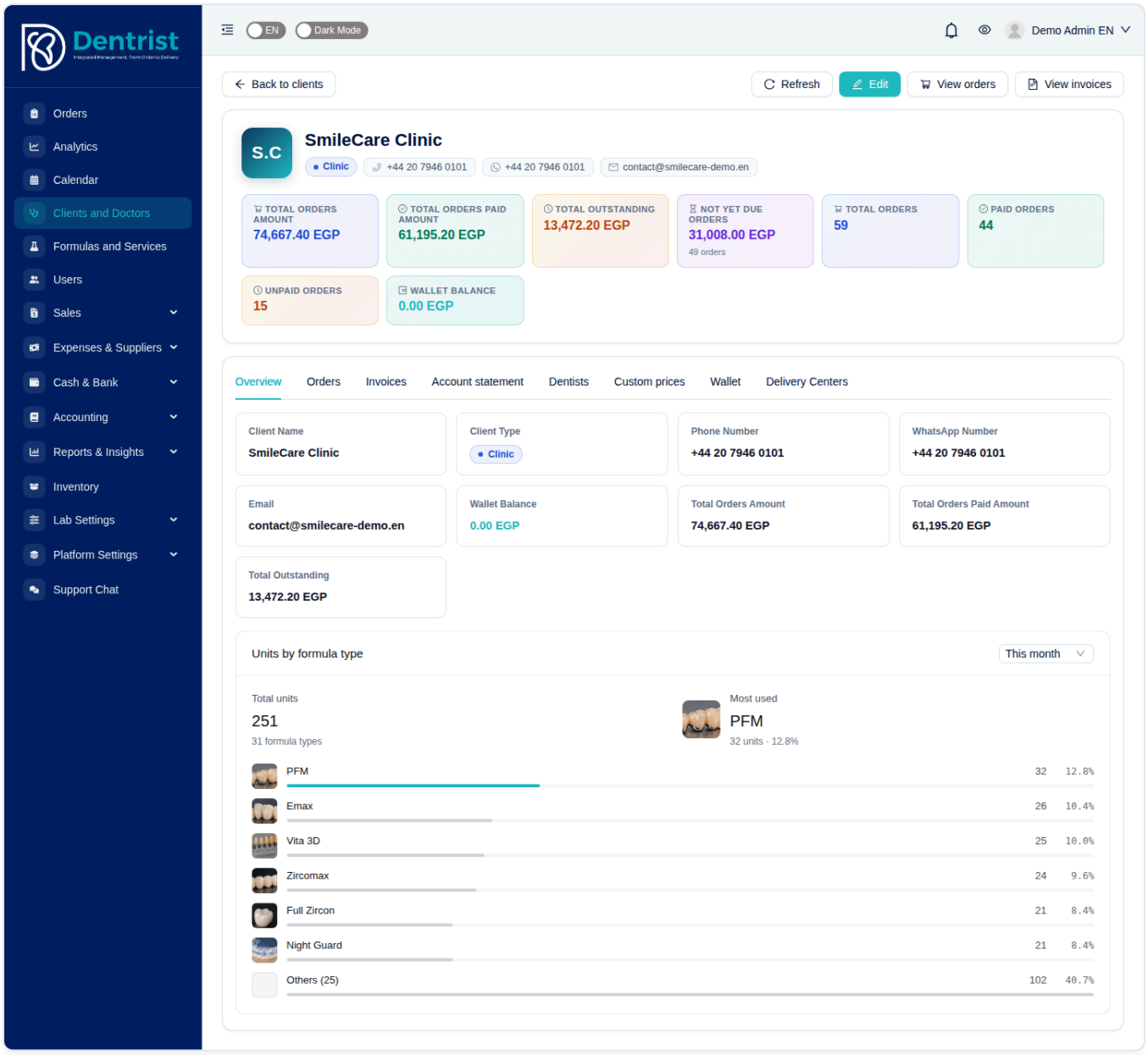
Click **Add Client** and fill in the client's name, type, phone, WhatsApp, email and address. You can add the client's dentists and delivery centers right away or later from the client page.



Adding a new client.

5.3 The client page

Click a client name to open its page. The header shows the client's contacts and the key figures: total orders amount, total paid, total outstanding, not-yet-due orders, number of orders and how many are paid and unpaid.



The client page, Overview tab, with the formula types this client orders most.

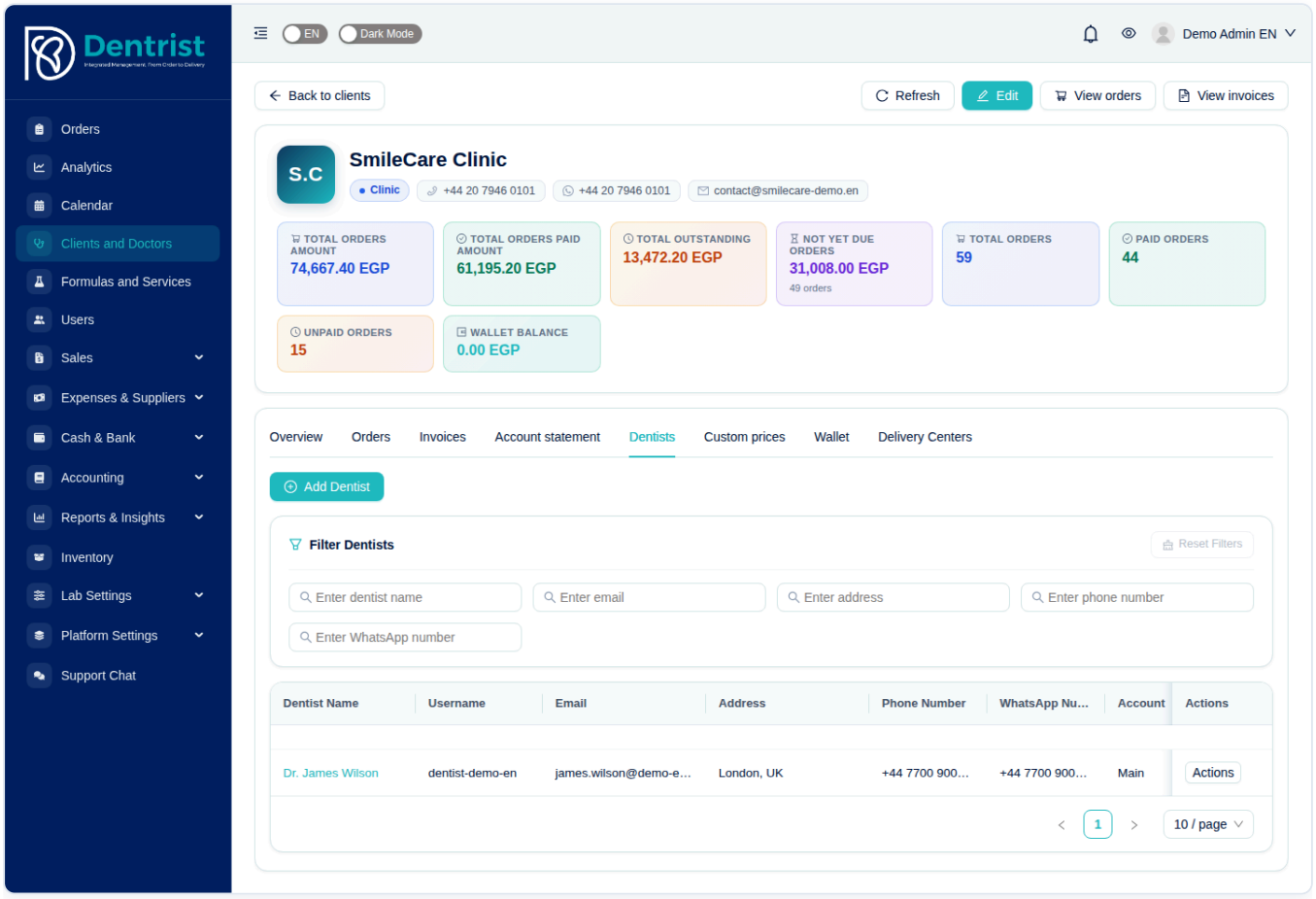
The tabs are:

Tab	What it shows
Overview	Client details, totals and the formula types tracker
Orders	All the client's orders
Invoices	All the client's invoices
Account statement	Every billable order with its paid or due state and the balance
Dentists	The dentists who work for this client and their portal access
Custom prices	Special prices for this client
Wallet	Prepaid balance and its history

Tab	What it shows
Delivery Centers	The addresses where cases are delivered

5.4 Dentists and portal access

Open the **Dentists** tab to add a dentist to the client or edit one. Each dentist can receive an **invitation** to the dentist portal, where they can send orders and follow their cases (see 14. The dentist portal).



The dentists of a client.

5.5 Custom prices

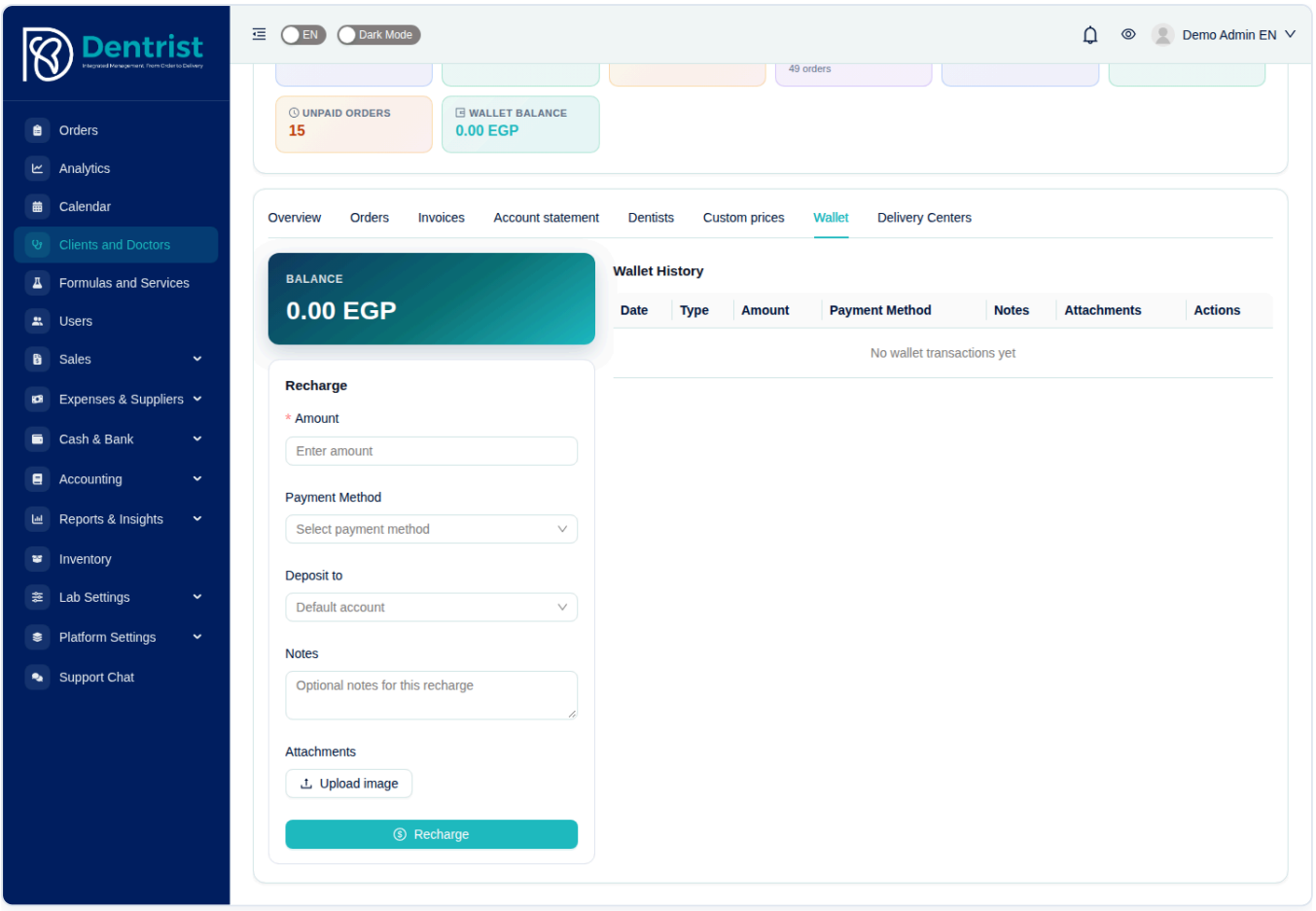
Some clients get special prices. In the **Custom prices** tab, set a price for any formula type. New orders for this client use that price instead of the catalog price. Existing orders keep the price they were created with.



Special prices for one client.

5.6 Wallet (prepaid balance)

A client can pay in advance, for example for a package of cases. The **Wallet** tab shows the balance and history.



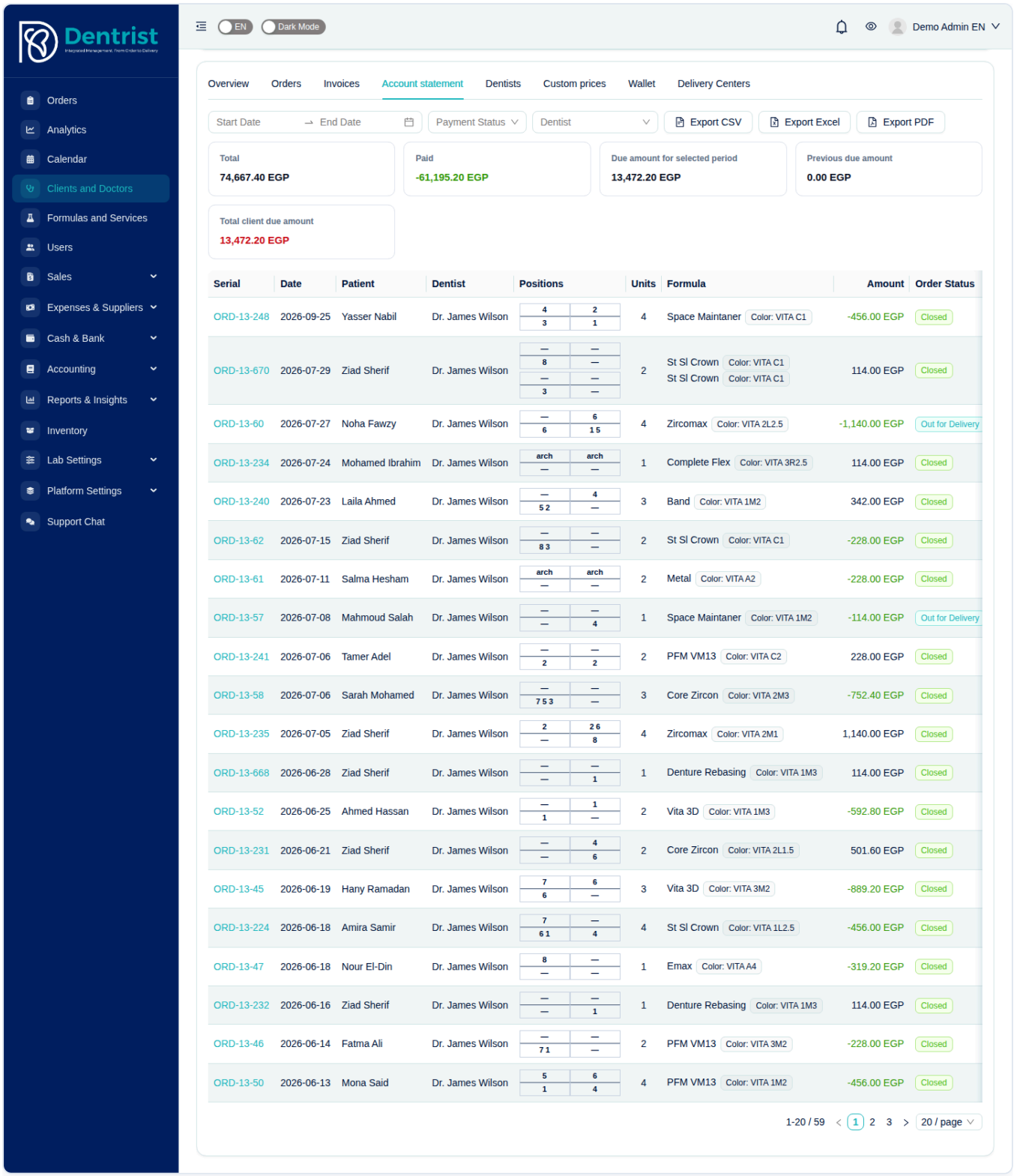
The client wallet.

- **Recharge:** add money to the wallet, with the payment method and the cash or bank account that received the money.
- The wallet can then be used as a payment method on the client's invoices.
- When an invoice is refunded, the paid amount goes back to the wallet.
- **Revert** cancels a recharge (admins only, and only if the balance is high enough).

> **Note:** In accounting, wallet money is a liability (money you hold for the client), not income. It becomes income only when it pays for delivered work.

5.7 Account statement

The **Account statement** tab lists every billable order of the client with its amount and whether it is **Paid** or **Due**, plus the totals: due for the selected period, previous due amount and total client due amount. Filter by date range, dentist and status, and click **Export** to download it as CSV, Excel or PDF to send to the client.



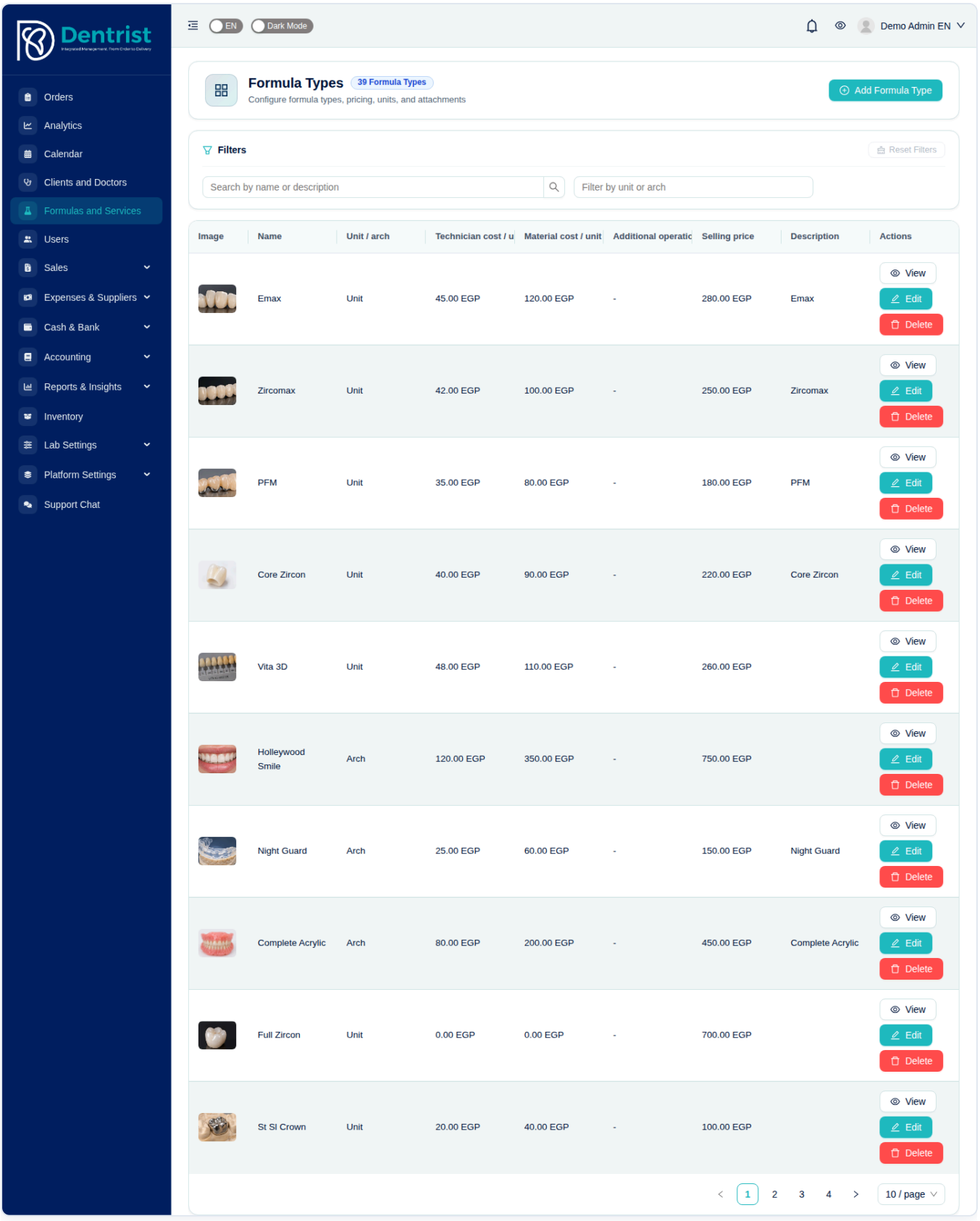
The client account statement.

6. Formulas, services and colors

6.1 Formula types

Menu: Formulas and Services

Formula types are the products and services you sell: zirconia crowns, Emax, PFM, dentures, night guards, repairs and so on.



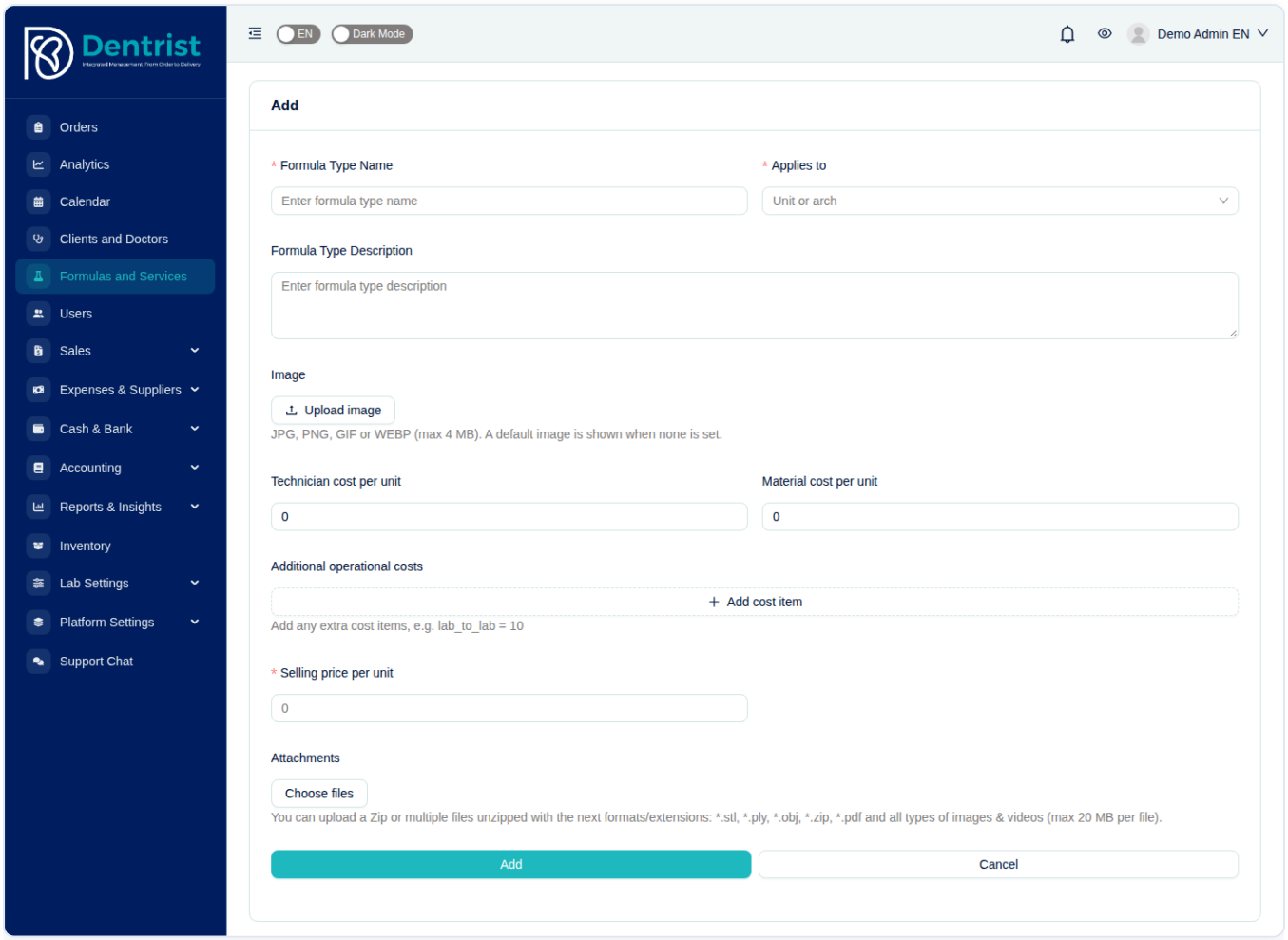
The formula types list with image, unit, costs and selling price.

Each formula type has:

- **Name, image and description.**
- **Unit or arch:** whether it is priced per tooth (unit) or per arch.

- **Selling price:** the default price per unit.
- **Technician cost**, **material cost** and **additional operation costs** per unit (for example milling). Dentrist uses these to calculate the production cost and margin of every order automatically.

Click **Add Formula Type** to create one, or **Edit** on a row to change it. Changing a price does not change existing orders.



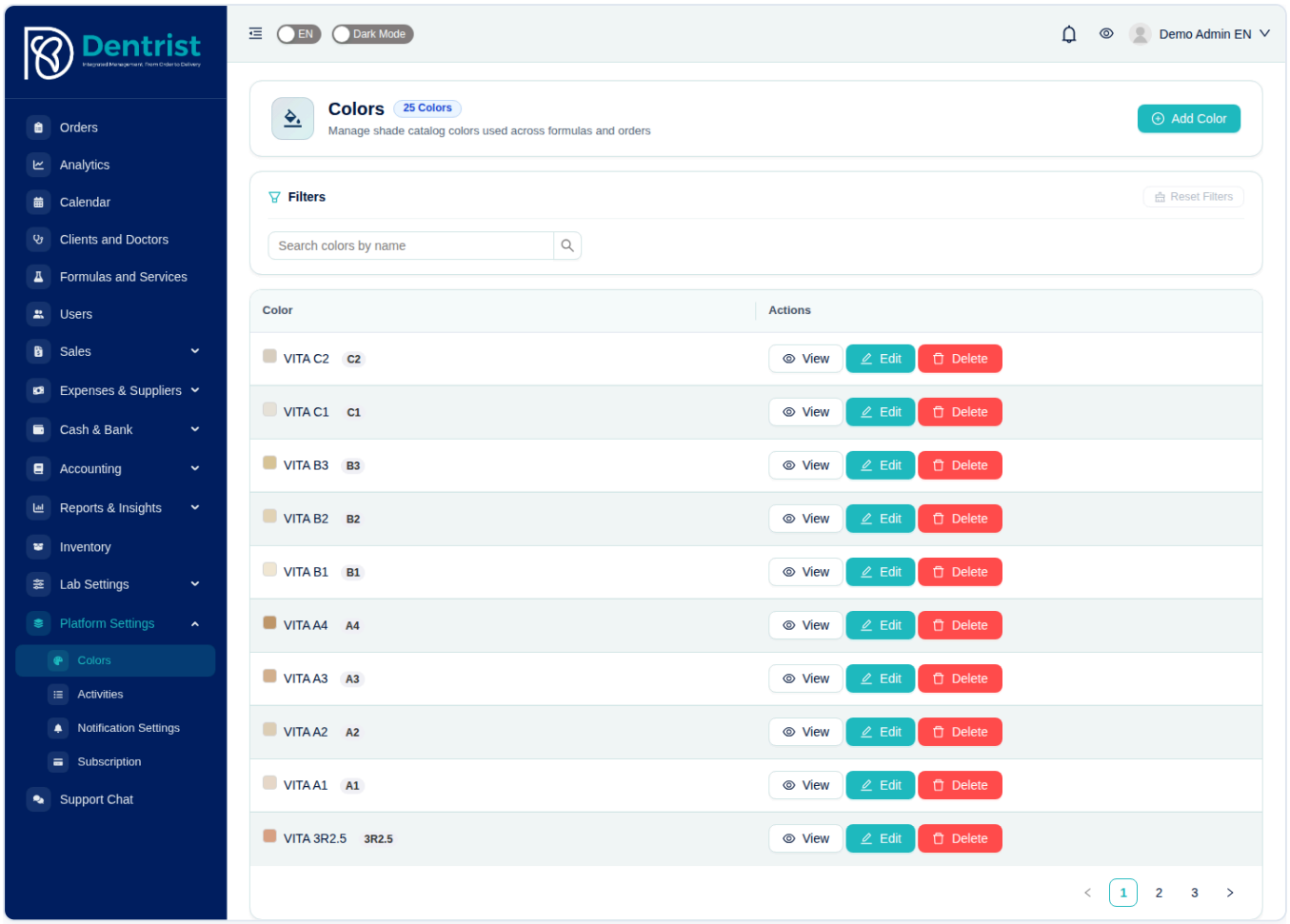
Creating a formula type.

> **Note:** Whether material, technician and additional costs are included in cost calculations is switched on per lab by the Dentrist team.

6.2 Colors (shades)

Menu: Platform Settings → Colors

The shade catalog used when you choose a color for a formula (VITA A1 to D4 and any custom shades). Add, edit or delete colors here.



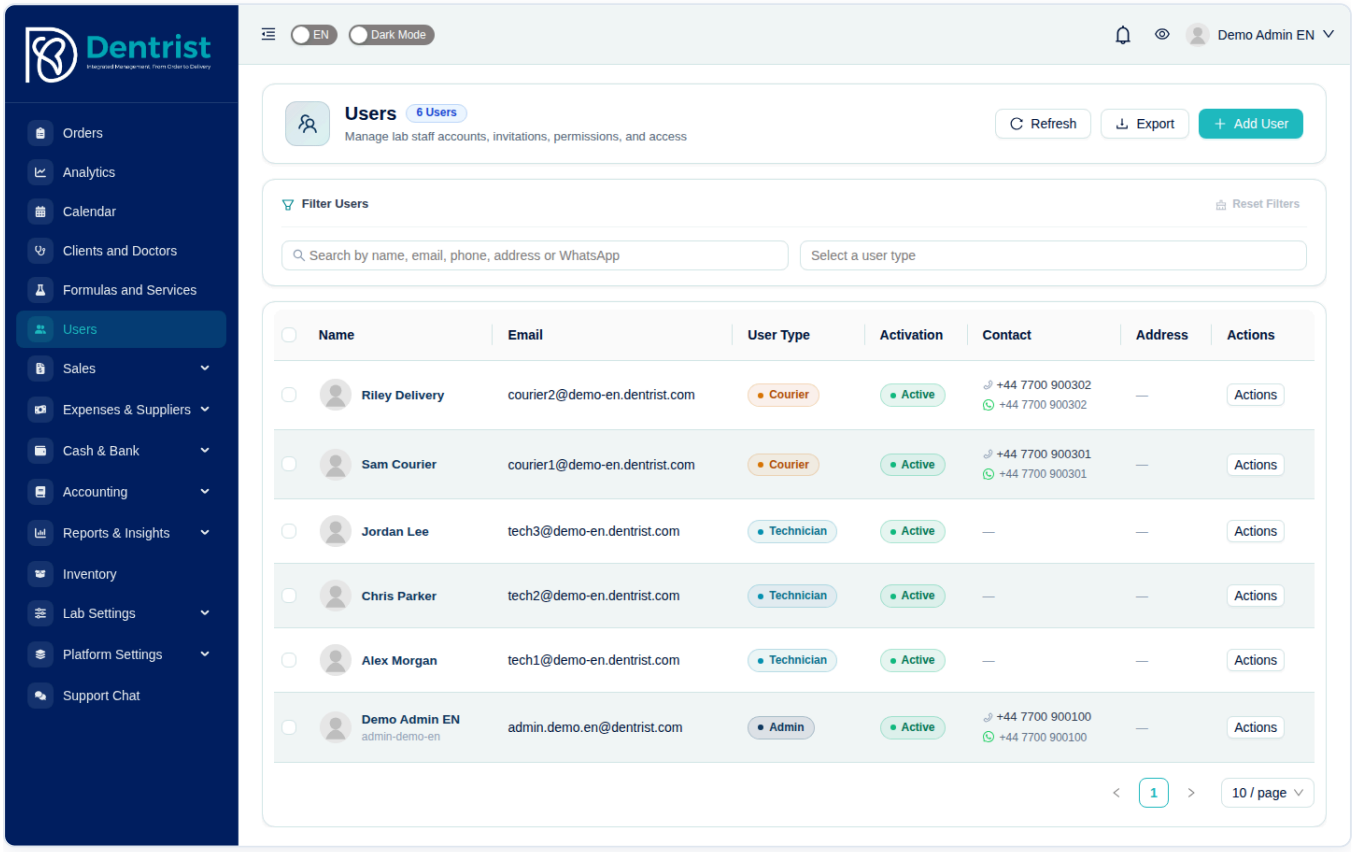
The shade catalog.

7. Users and roles

Menu: Users

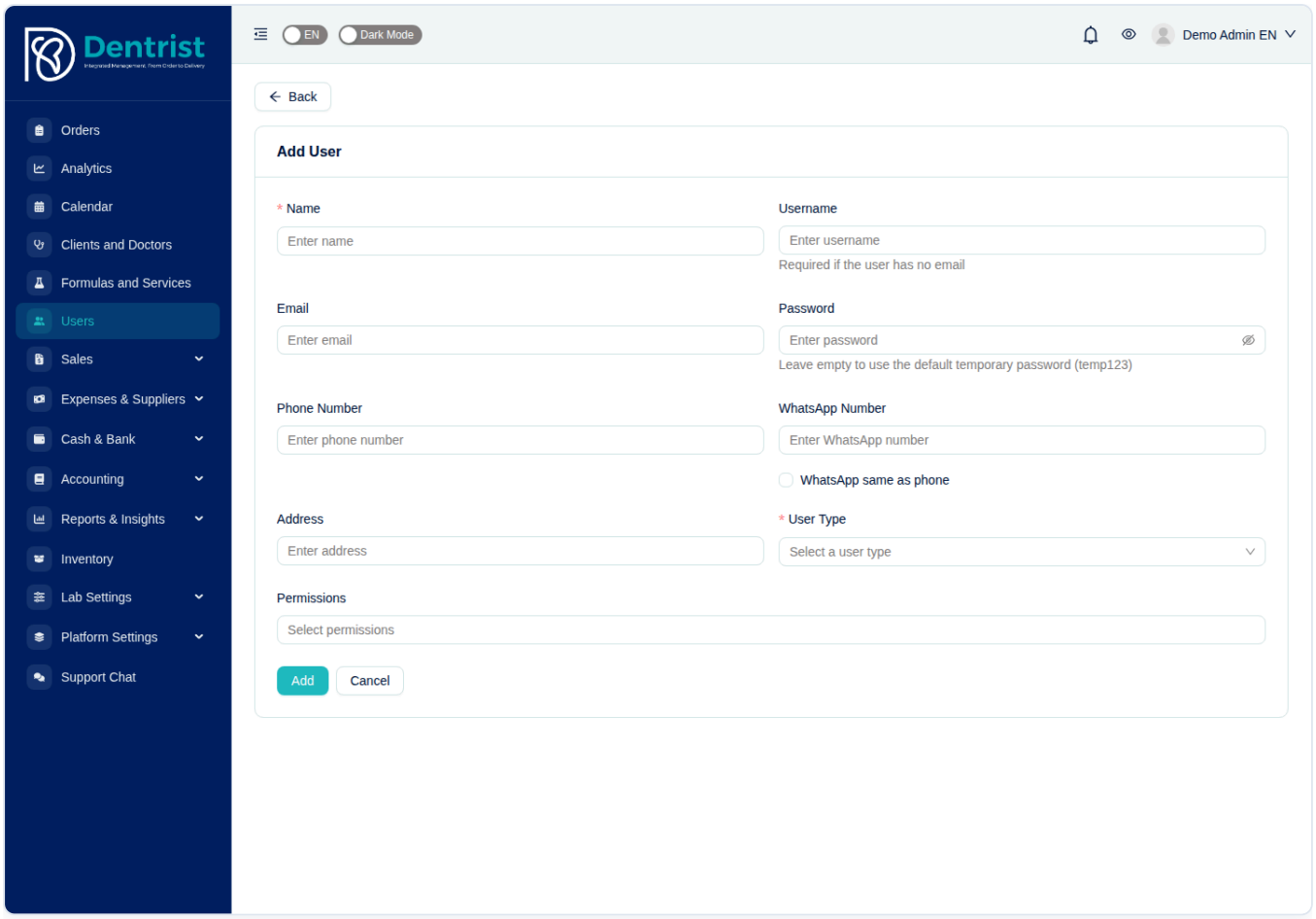
7.1 Users

The Users page lists your lab staff: name, email, user type (Admin, Technician, Courier…), whether the account is active, and contacts.



Lab staff accounts.

To add a staff member, click **Add User** and fill in the name, username, email, phone, WhatsApp, user type (role) and password. Use **Actions** on a row to view, edit, deactivate, see the change history of, or delete a user.

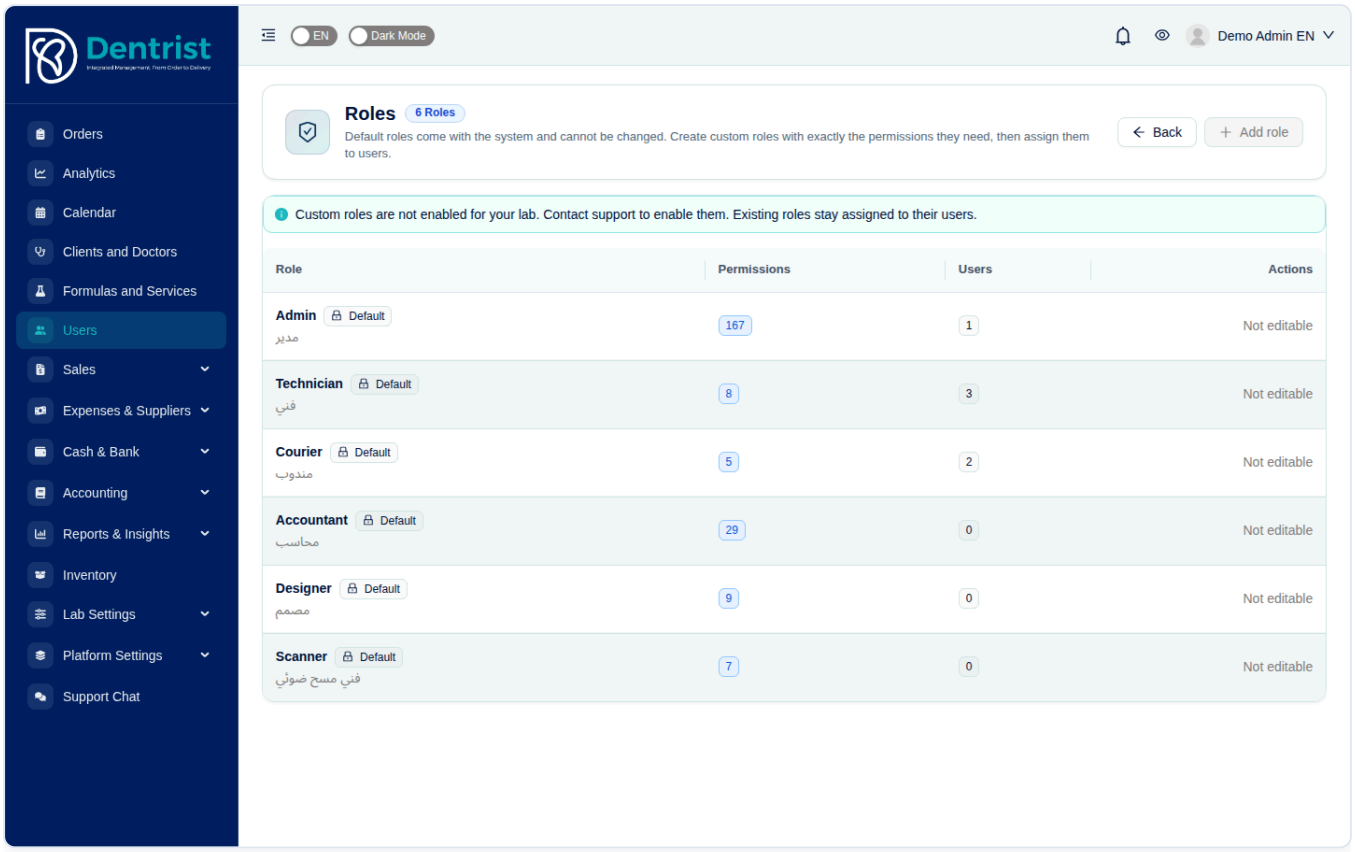


Adding a staff account.

> **Tip:** Deactivate people who leave the lab instead of deleting them. Their history (orders, phases, payments) stays intact and they can no longer sign in.

7.2 Roles and permissions

Click **Roles** on the Users page to see the roles, how many permissions each has and how many users use it. The default roles (Admin, Technician, Courier, Accountant, Designer, Scanner) come with the system and cannot be changed.



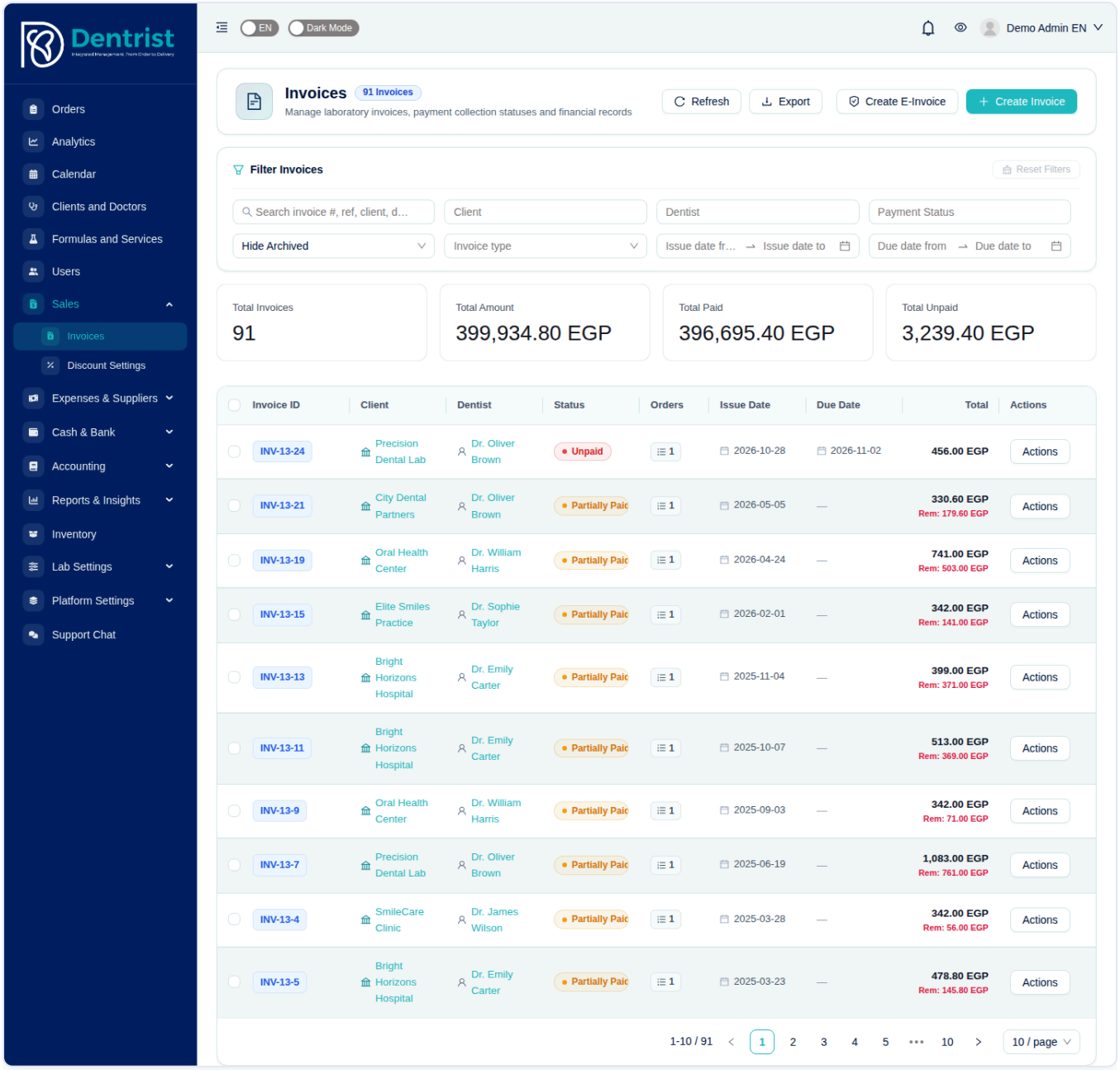
The roles of the lab.

When **custom roles** are enabled for your lab, click **Add role**, give it a name and tick exactly the permissions it needs (for example, a receptionist who can create orders and see clients but not finance). If the button is disabled, contact Dentrist support to enable the feature.

8. Sales: invoices and payments

8.1 The invoices list

Menu: Sales → Invoices



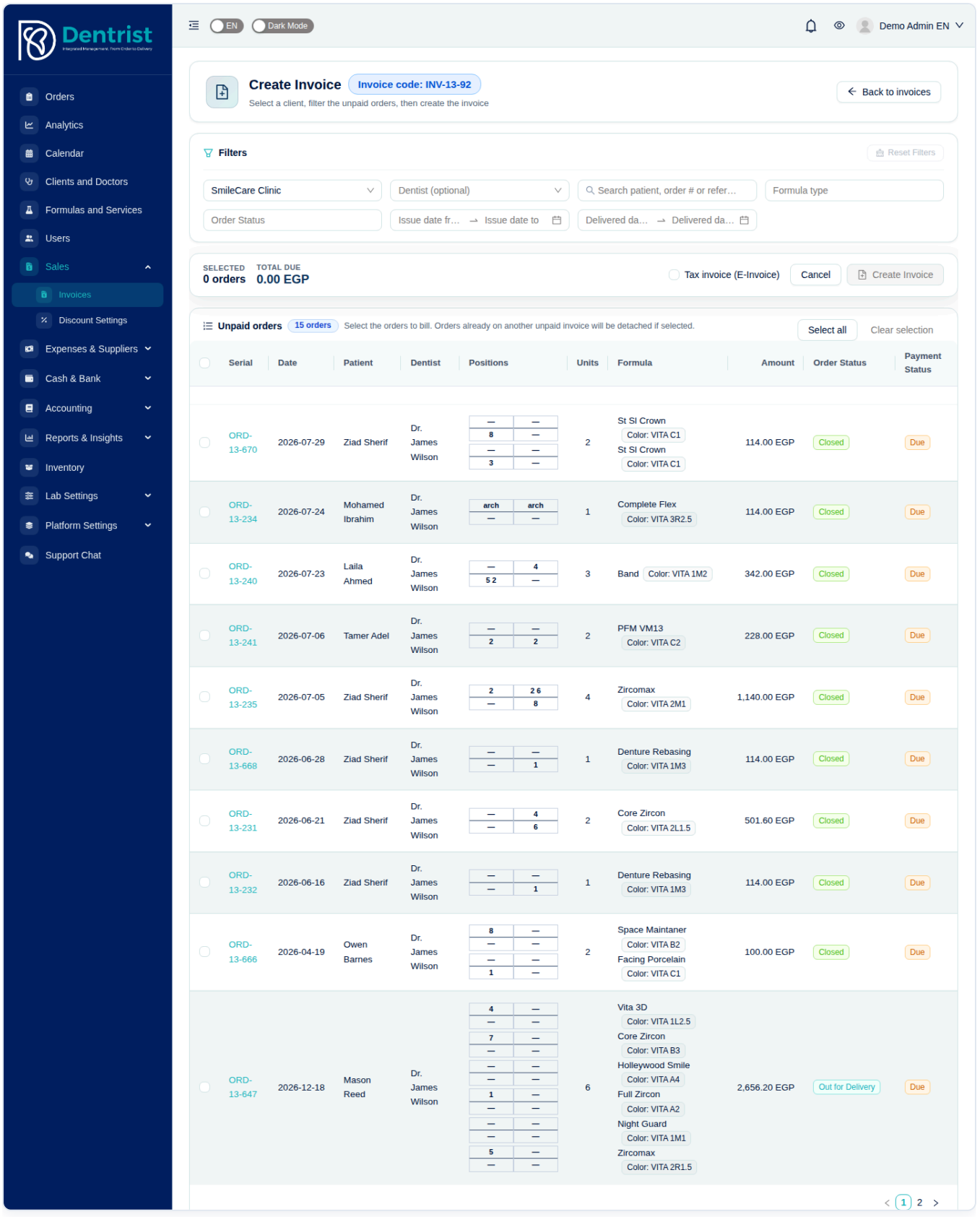
Invoices with their status, totals and remaining amounts.

The cards at the top show the number of invoices, total amount, total paid and total unpaid. Filter by invoice number, client, dentist, payment status (Unpaid, Partially Paid, Paid), invoice type, issue date and due date. Unpaid rows are highlighted in red and partially paid ones in orange, with the remaining amount under the total.

8.2 Creating an invoice

There are three ways to invoice orders:

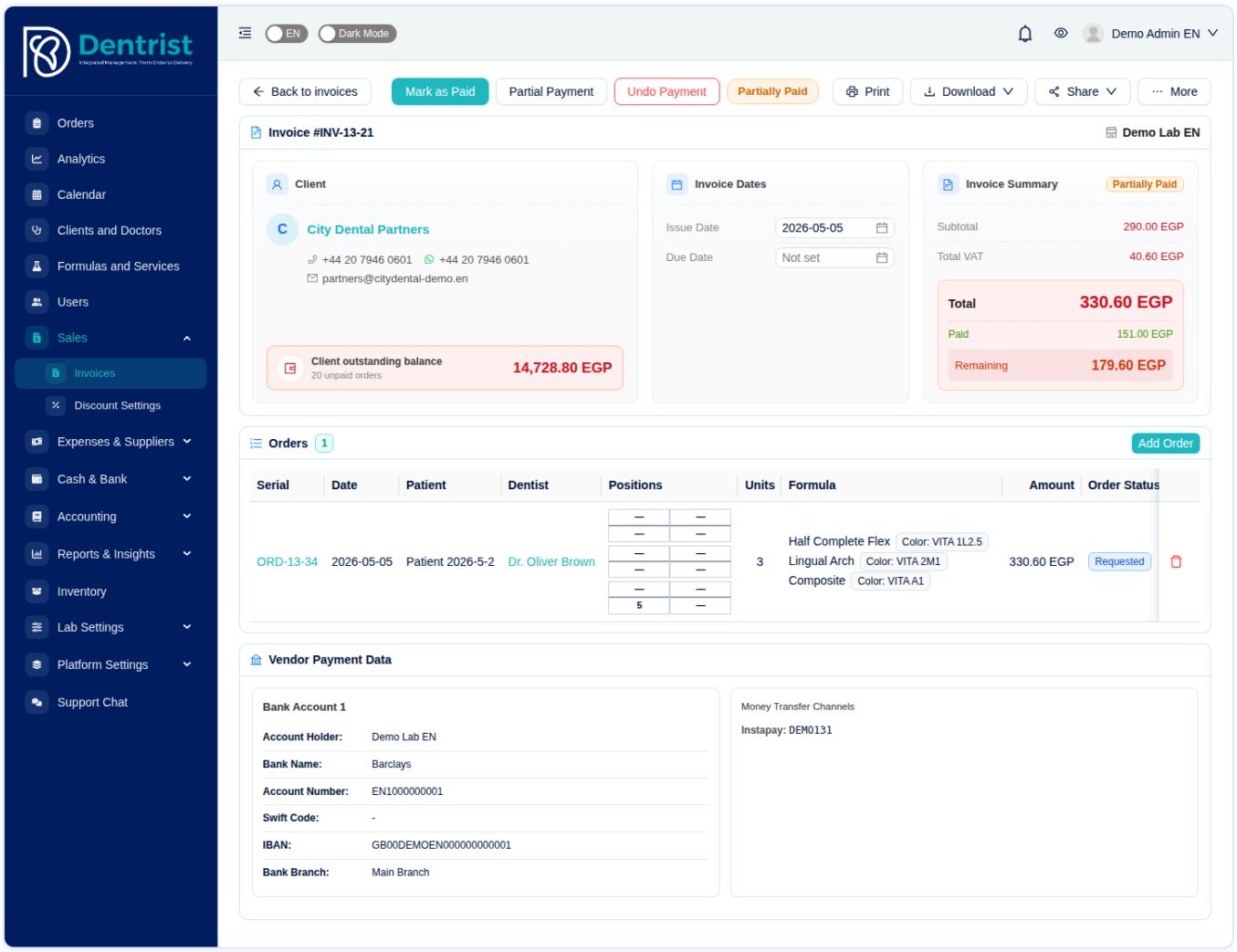
- **From an order:** on the order page, click **Create invoice**.
- **Add to an existing invoice:** on the order page, click **Attach to invoice**.
- **From the invoices list:** click **Create Invoice**, choose the client and tick the unpaid orders to include.



Creating an invoice from the client's unpaid orders.

Only orders that have reached the billable status and are not already on another active invoice can be invoiced. The invoice total is the sum of its orders. The invoice gets its own code (for example *INV-13-24*), the issue date is today and the due date is set automatically (you can change both).

8.3 The invoice page



An invoice that is partially paid.

The invoice page shows the client, the invoice dates, the **Invoice Summary** (subtotal, VAT, total, paid and remaining) and the client's total outstanding balance. Below are the orders on the invoice, and at the bottom the lab's **bank accounts and money transfer channels** so the client knows how to pay.

Actions at the top:

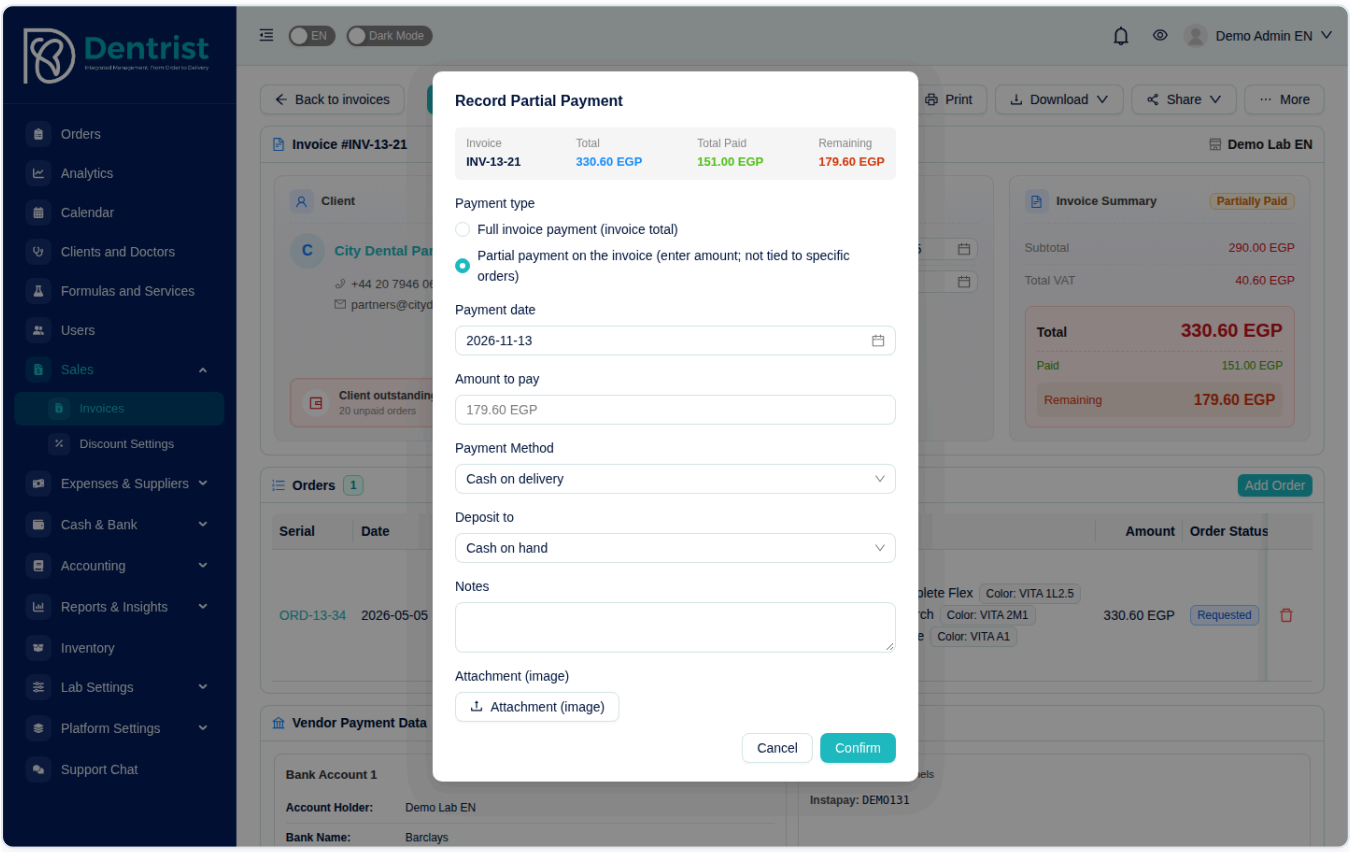
Button	What it does
Mark as Paid	Record full payment of the remaining amount
Partial Payment	Record part of the amount, or pay specific orders
Undo Payment	Remove the recorded payments
Print	Print the invoice
Download	Download as PDF
Share	Share the invoice, for example by WhatsApp or a public link
More	Change history, refund to wallet, cancel, delete, detach orders, e-invoice

Add Order adds another unpaid order of the same client to the invoice. The bin icon on an order row removes it from the invoice.

8.4 Recording a payment

Click **Mark as Paid** or **Partial Payment**:

1. Enter the **amount** (for a partial payment) or choose the orders being paid.
2. Choose the **payment method**: cash, bank transfer, money transfer channel (for example InstaPay), card or **wallet**.
3. Choose the **account** the money went into (cash on hand, a bank account…).
4. Set the **payment date** and add a note or attachment if you like, then confirm.



Recording a partial payment.

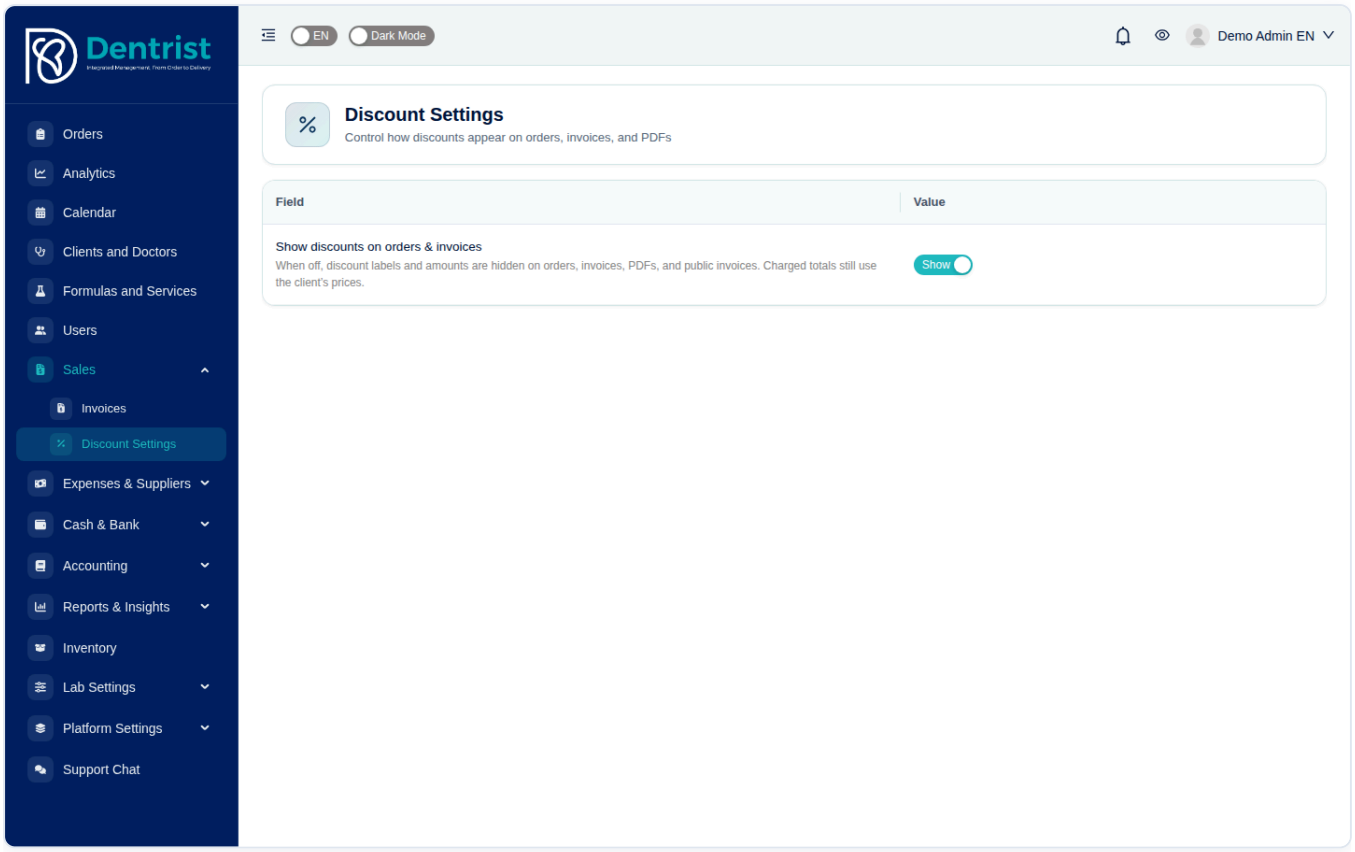
The invoice status becomes **Partially Paid** or **Paid** automatically. When it is fully paid, its orders are marked paid and moved to *Closed*. The payment appears in Transactions, in the client's account statement and in the ledger.

> **E-invoicing:** If your lab uses the Egyptian Tax Authority e-invoice integration, open **More → E-invoice** on a non-draft invoice to check readiness, submit it and follow its status.

8.5 Discount settings

Menu: Sales → Discount Settings

Choose whether discount labels and amounts appear on orders, invoices, PDFs and public invoices. When hidden, clients only see the final prices; the charged totals do not change.



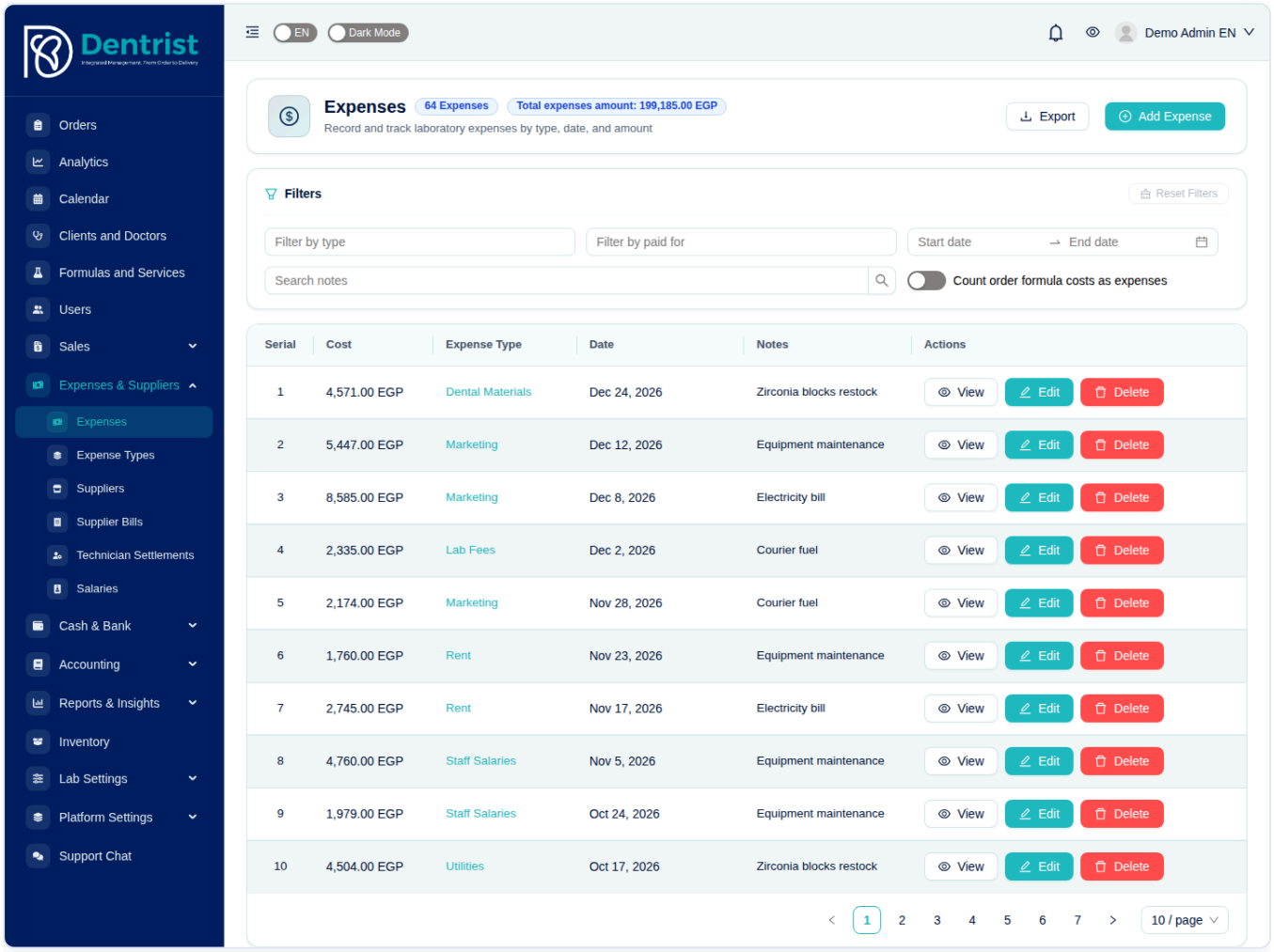
Show or hide discounts on documents.

9. Expenses and suppliers

9.1 Expenses

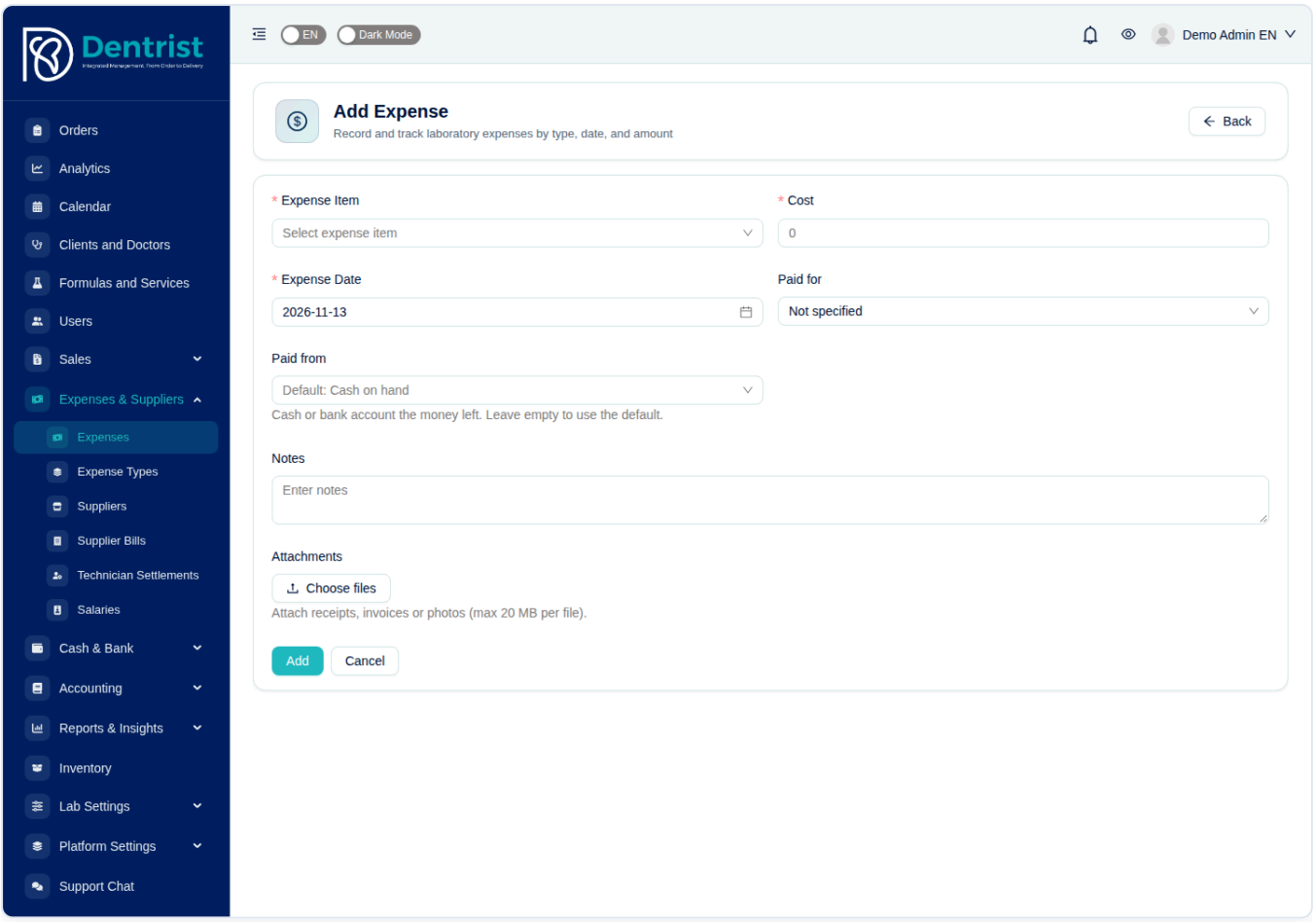
Menu: Expenses and Suppliers → Expenses

Record everything the lab spends that is not a supplier bill: rent, electricity, fuel, marketing, maintenance…



The expenses list with the total at the top.

Click **Add Expense** and fill in the **expense type**, **cost**, **date**, who it was **paid to** (a staff member, optional), which cash or bank account it was **paid from**, notes and attachments (receipts).



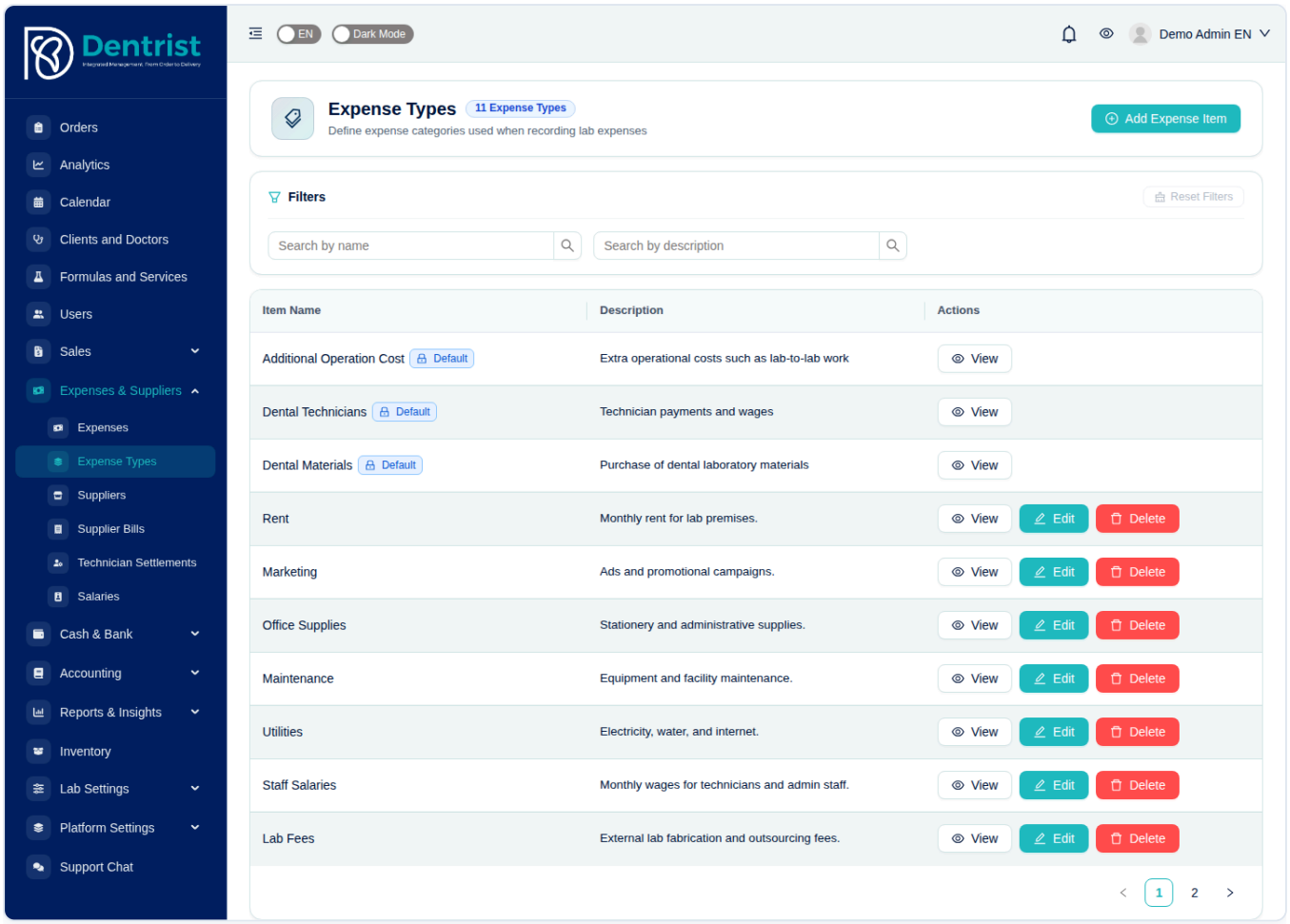
Recording an expense.

Count order formula costs as expenses: by default, the automatic production costs of orders are used for margins and reports only, so they are not counted twice with your actual purchases. Turn this switch on if you want them counted as expenses too.

9.2 Expense types

Menu: Expenses and Suppliers → Expense Types

The categories for expenses. *Additional Operation Cost*, *Dental Technicians* and *Dental Materials* are defaults that cannot be deleted. Add your own (Rent, Marketing, Utilities, Staff Salaries…). Each type posts to its own expense account in the ledger.

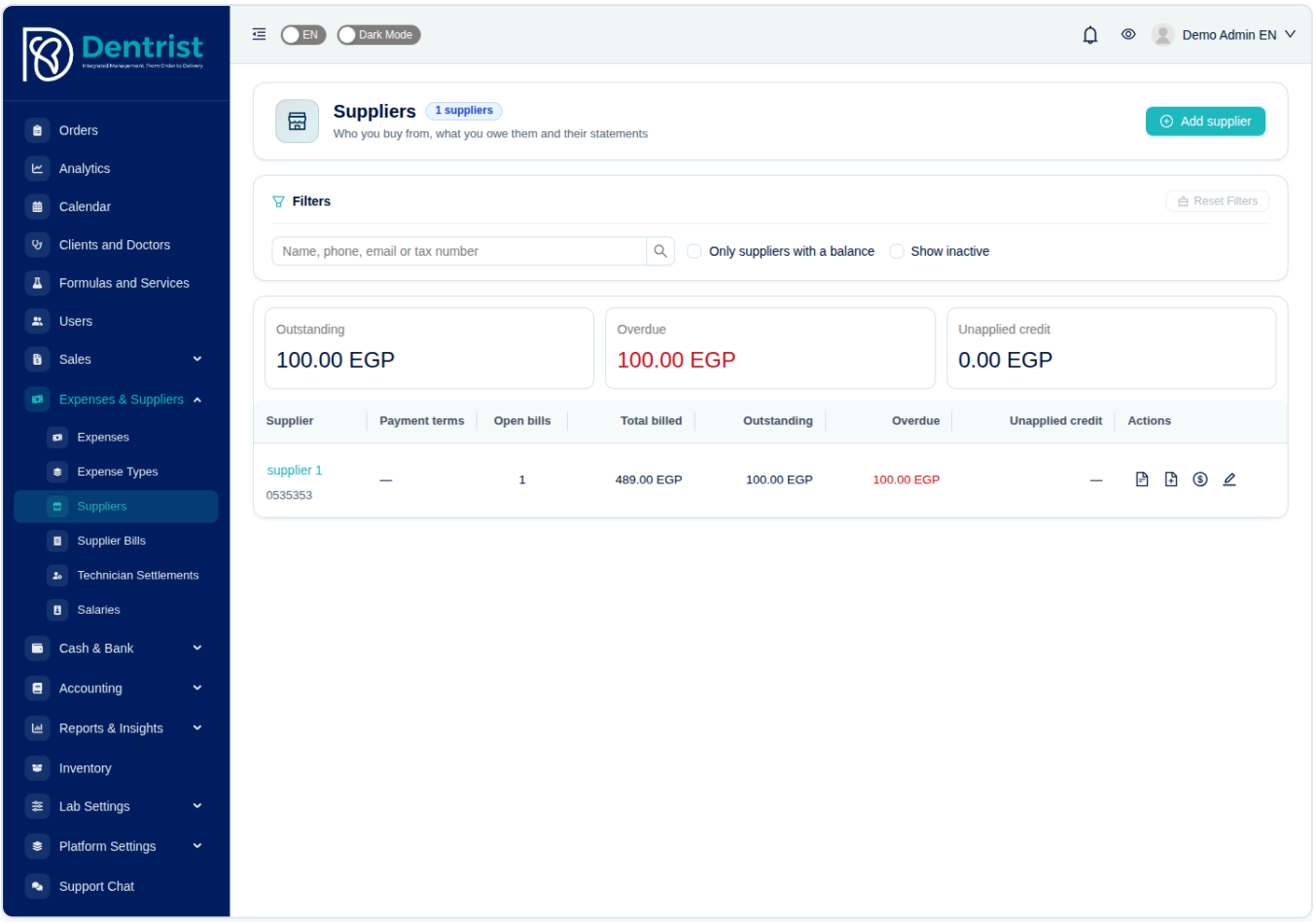


Expense categories.

9.3 Suppliers

Menu: Expenses and Suppliers → Suppliers

The companies you buy from. The cards show the total **Outstanding**, **Overdue** and **Unapplied credit** across suppliers, and the table shows each supplier's payment terms, open bills, total billed, outstanding and overdue amounts. The icons on each row open the supplier's statement, bills and payments.



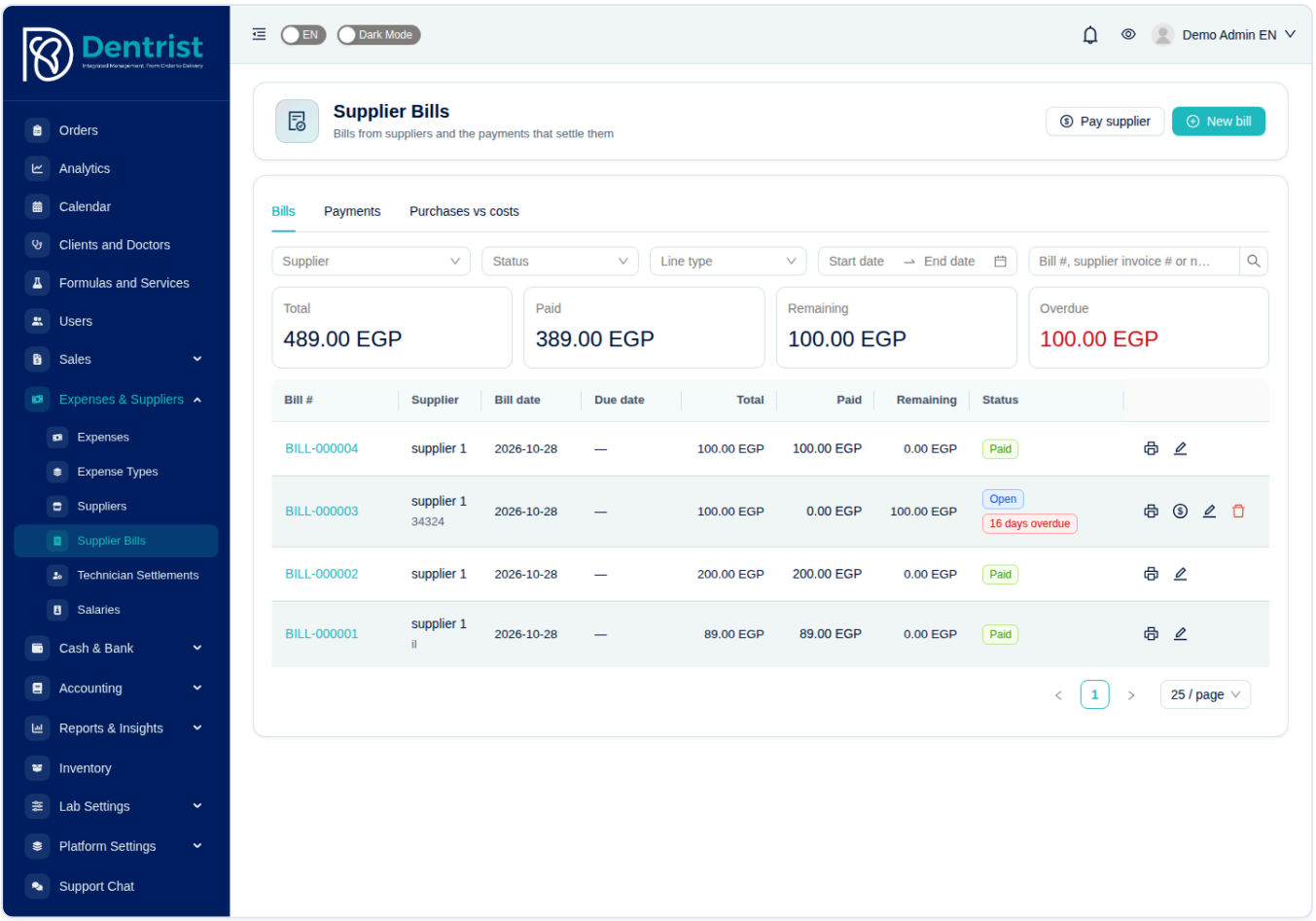
Suppliers and what you owe them.

Click **Add supplier** and enter the name, phone, email, tax number and **payment terms** (for example 30 days).

9.4 Supplier bills

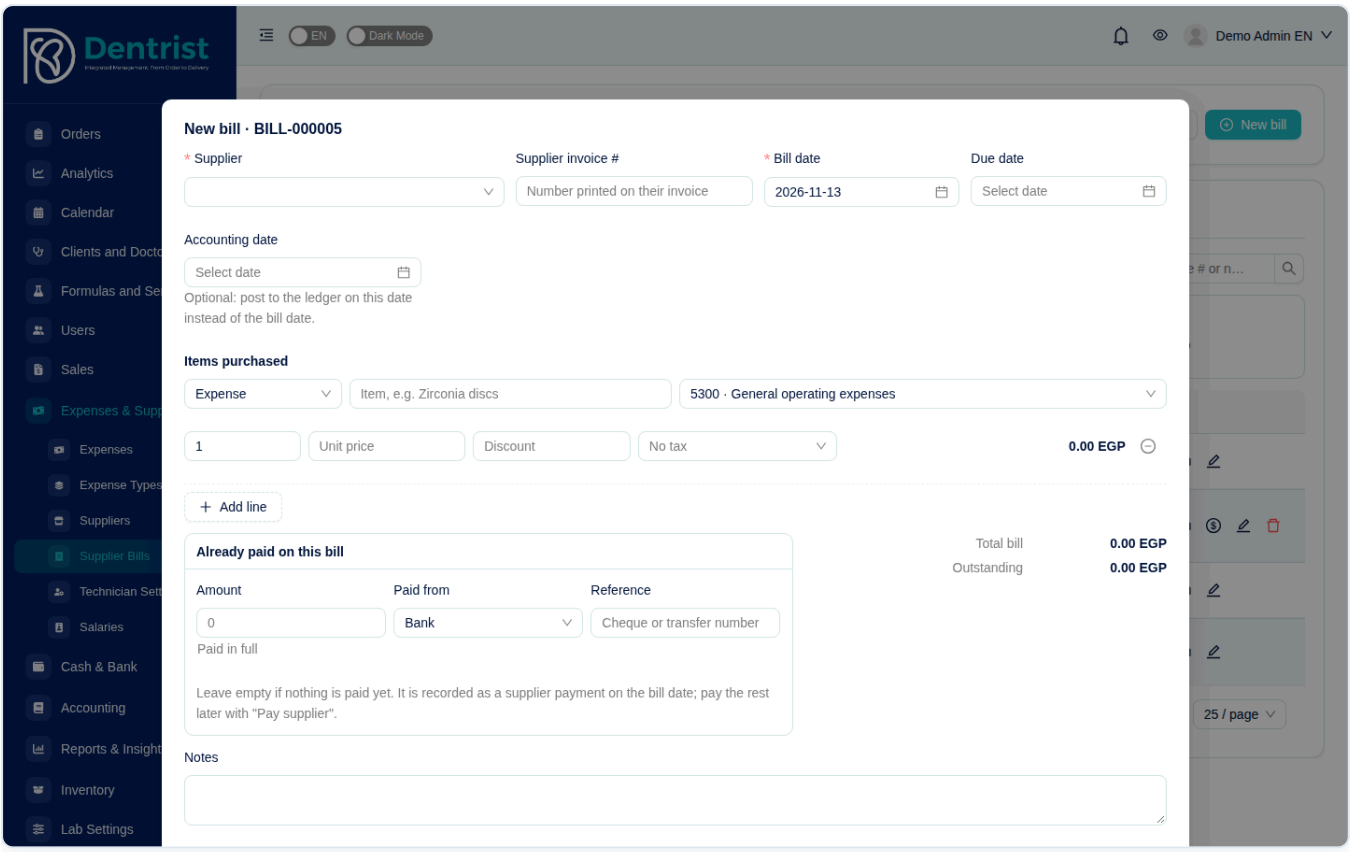
Menu: Expenses and Suppliers → Supplier Bills

A supplier bill records a purchase on credit. It increases what you owe the supplier until you pay it.



Supplier bills with their paid, remaining and overdue amounts.

- **New bill:** choose the supplier, bill date, due date and the supplier's invoice number, then add lines (expense type or stock item, quantity, price, tax). Lines with stock items add stock to Inventory when the bill is approved.
- **Pay supplier:** record a payment and allocate it to one or more bills.
- Tabs: **Bills**, **Payments** and **Purchases vs costs**.
- Overdue bills are flagged with the number of days overdue.

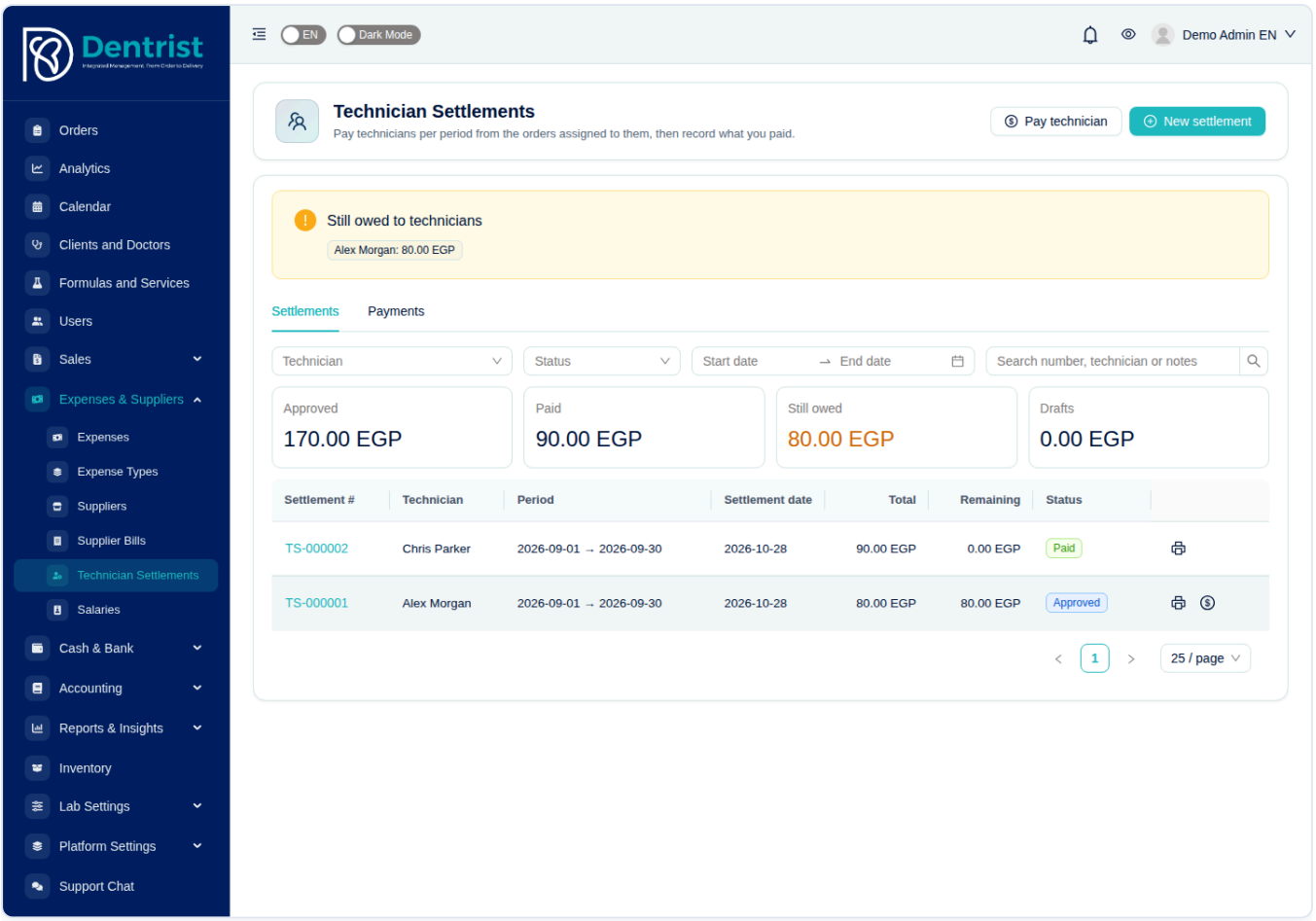


Creating a supplier bill.

9.5 Technician settlements

Menu: Expenses and Suppliers → Technician Settlements

Pay technicians per piece for the orders assigned to them.



Settlements, with a warning of what is still owed to each technician.

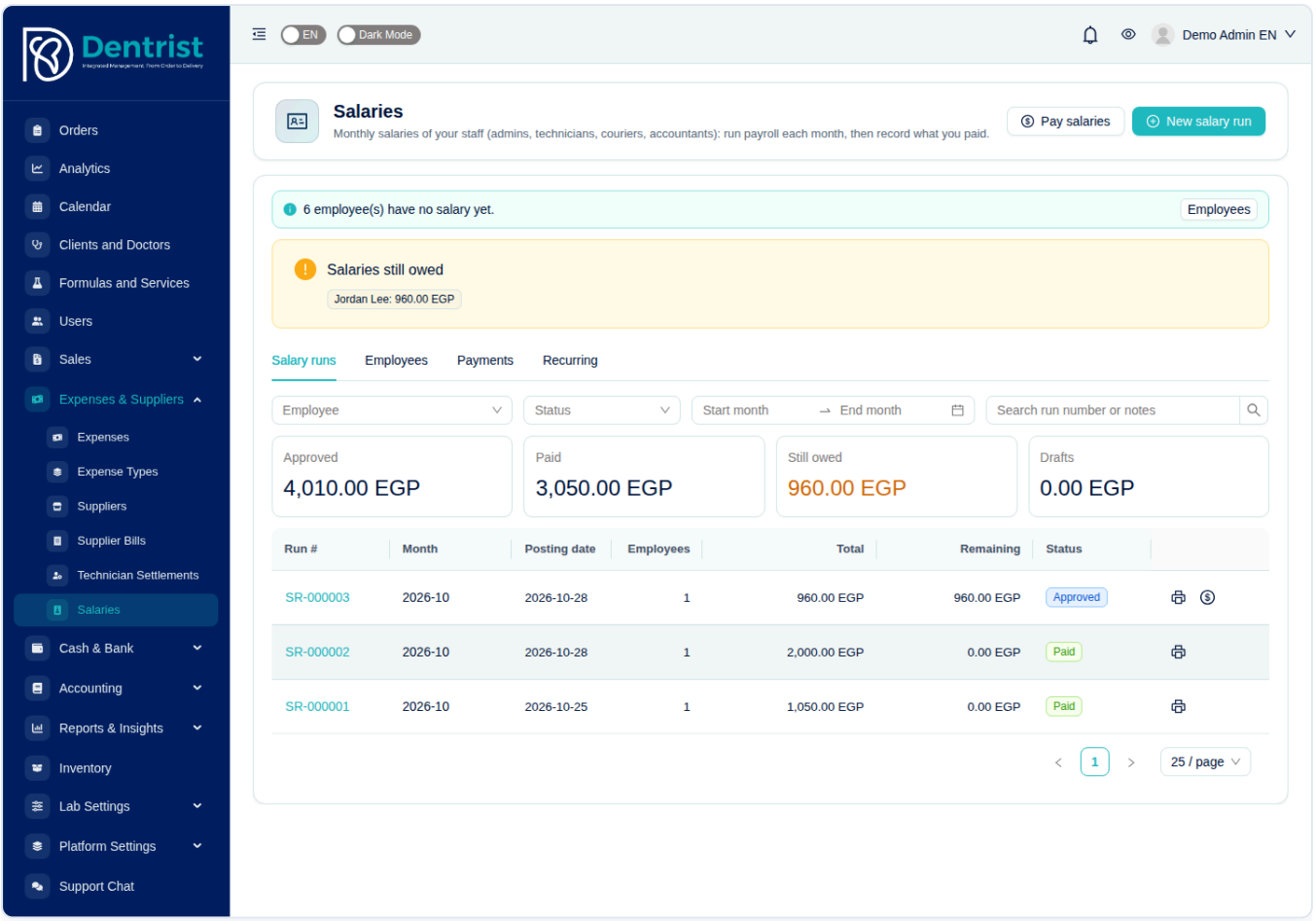
1. Click **New settlement**, choose the technician and the period, and click **Load orders**. Dentrist lists the technician's orders in that period with the amount due for each.
2. Review, adjust if needed, and **approve**. The amount is now owed to the technician.
3. Click **Pay technician** (or the pay icon on a settlement) to record the payment.

The cards show what is approved, paid, still owed and in draft.

9.6 Salaries

Menu: Expenses and Suppliers → Salaries

Monthly payroll for your staff.



Salary runs, with the employees who have no salary set and the salaries still owed.

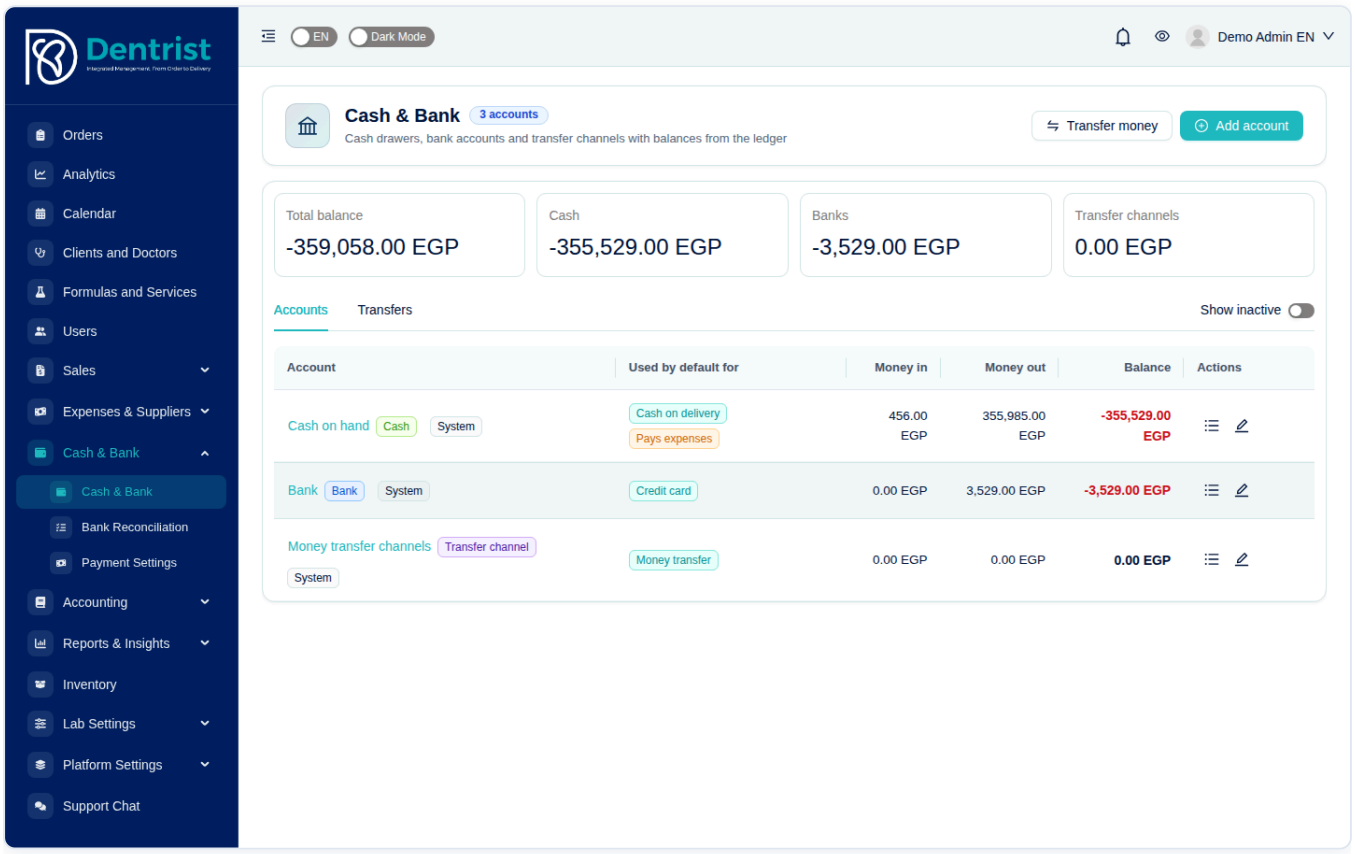
1. In the **Employees** tab, set each employee's salary and start date. You can also add employees who do not use the system (for example a cleaner); they have no login.
2. Click **New salary run**, choose the month, review allowances and deductions (partial months are prorated) and approve.
3. Click **Pay salaries** to record the payment.
4. In **Recurring**, let Dentrist create the salary run automatically every month on pay day.

10. Cash and bank

10.1 Cash and bank accounts

Menu: Cash and Bank → Cash and Bank

Your real money accounts: the cash drawer, bank accounts and money transfer wallets, with balances taken from the ledger.



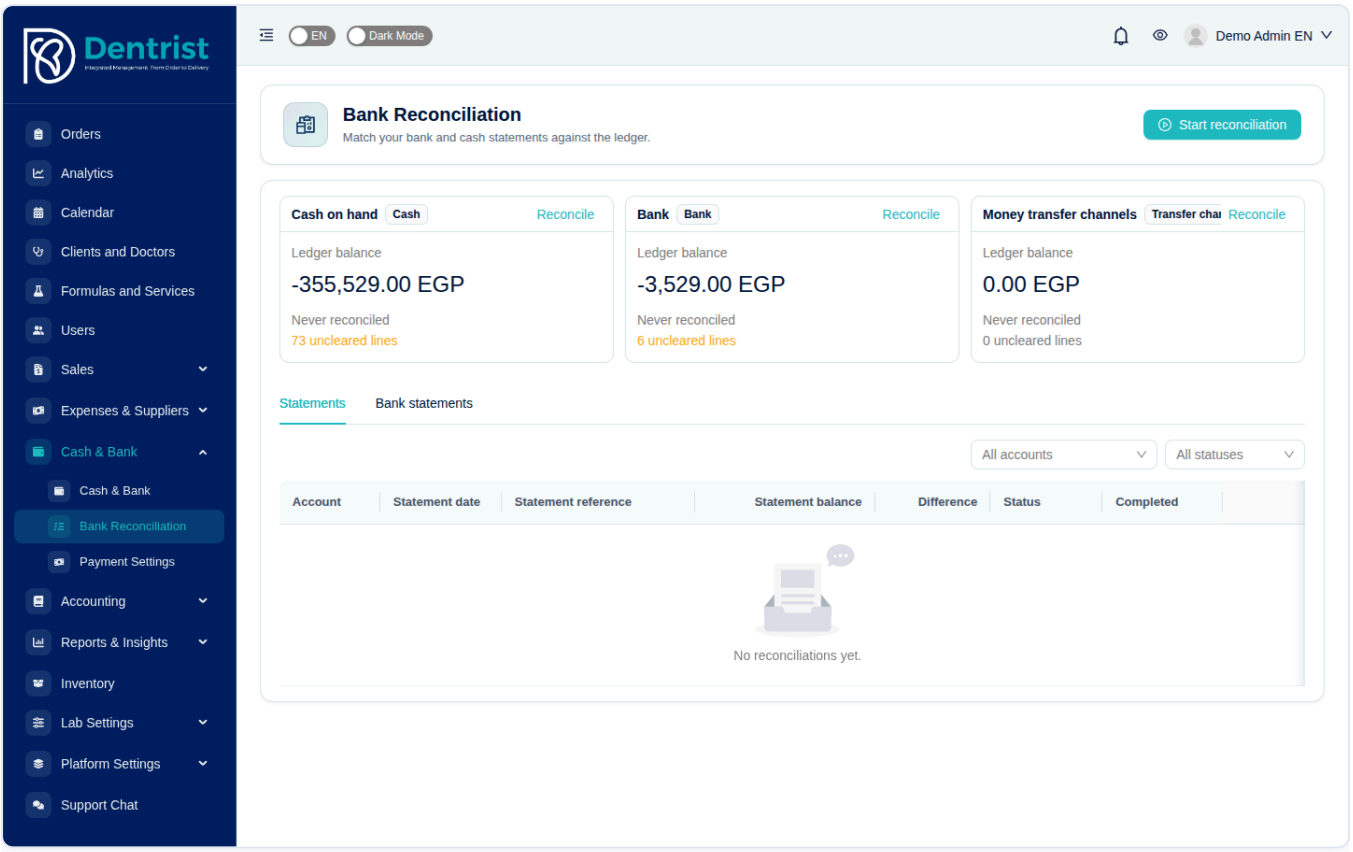
Balances per account and in total.

- Three built-in accounts exist: **Cash on hand**, **Bank** and **Money transfer channels**. Add more with **Add account** (for example a second bank).
- **Used by default for** shows which account receives each payment method (cash on delivery, credit card, money transfer) and which one pays expenses.
- **Transfer money** moves money between accounts (for example depositing cash into the bank).
- The list icon on a row opens the account's movements.

10.2 Bank reconciliation

Menu: Cash and Bank → Bank Reconciliation

Check that your ledger matches your bank statement.



Each account with its ledger balance, last reconciliation and uncleared lines.

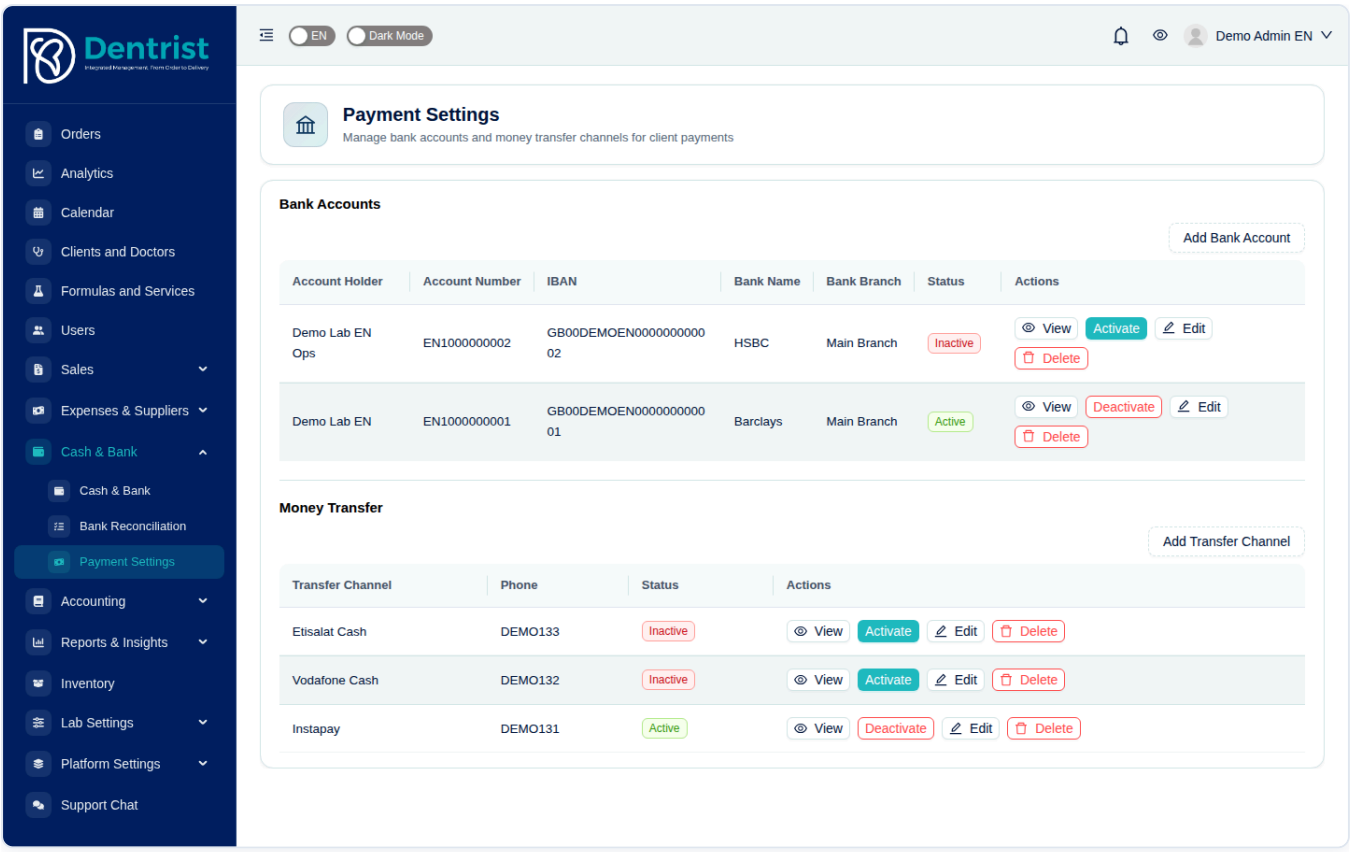
1. Click **Reconcile** on an account (or **Start reconciliation**).
2. Enter the statement date and the closing balance shown on the bank statement.
3. Tick each ledger line that appears on the statement. Dentrist shows the difference; when it reaches zero, complete the reconciliation.

In the **Bank statements** tab you can import a CSV or OFX statement file and let Dentrist match its lines to the ledger automatically.

10.3 Payment settings

Menu: Cash and Bank → Payment Settings

The bank accounts and money transfer channels (for example InstaPay or mobile wallets) that are printed on your invoices so clients know where to pay. Add, edit, activate or deactivate each one.



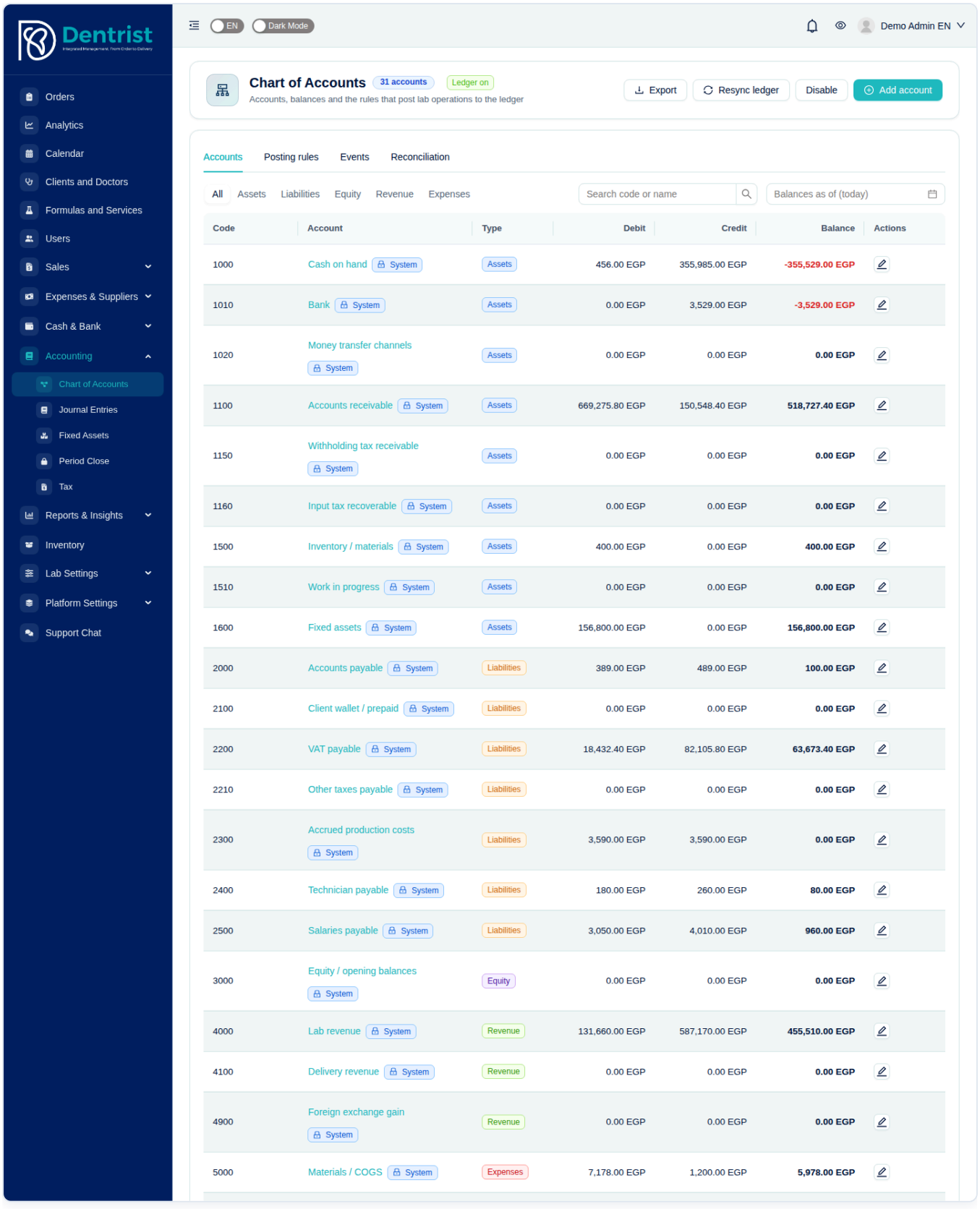
Bank accounts and transfer channels shown to clients.

11. Accounting

Dentrist includes a complete double-entry ledger. You do not need to type journal entries for daily work: orders, payments, expenses, bills, settlements and salaries post automatically. These pages are where you (or your accountant) review and control the books.

11.1 Chart of accounts

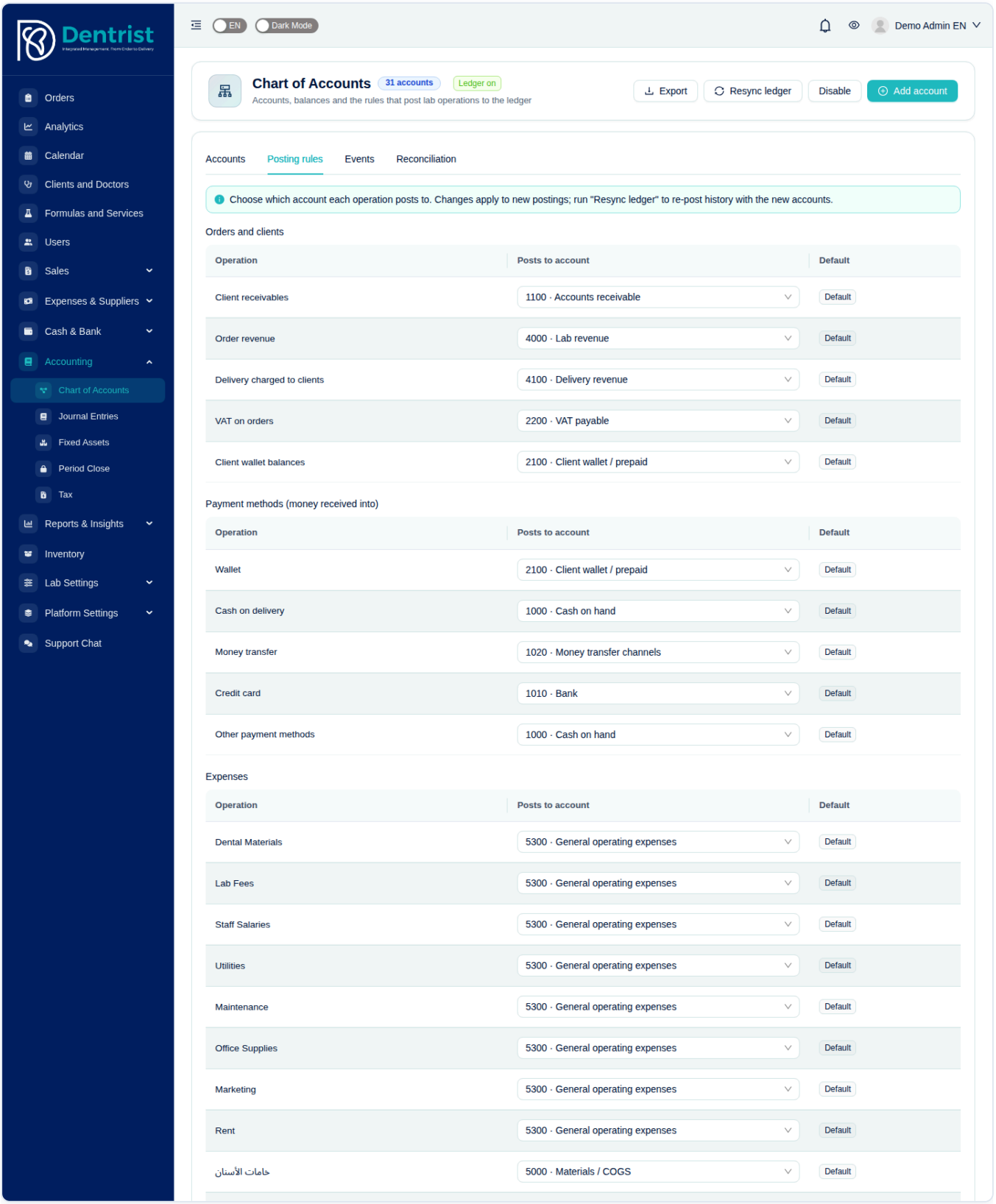
Menu: Accounting → Chart of Accounts



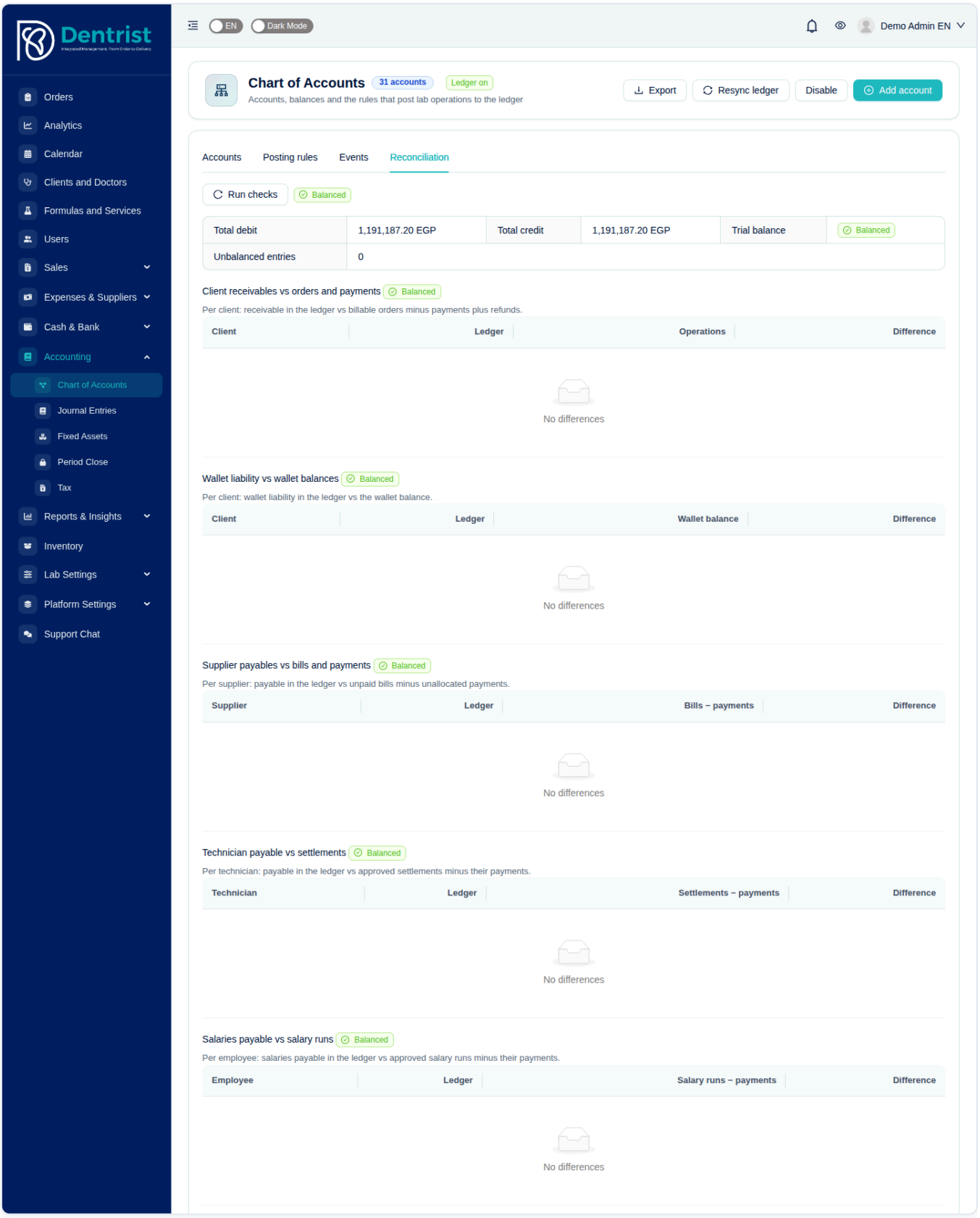
The chart of accounts with debit, credit and balance per account.

- The **Accounts** tab lists all accounts with their type (assets, liabilities, equity, revenue, expenses) and balances. Filter by type, search, or see balances as of a past date. **System** accounts are created by Dentrist and cannot be deleted; click **Add account** to add your own.
- The **Posting rules** tab shows which account each operation posts to (for example which revenue account an order uses, or which account an expense type uses), and lets you change them.

- The **Events** tab shows the queue of operations being posted.
- The **Reconciliation** tab runs a **health check** that compares the ledger with the operational data (client balances, wallets, supplier balances, technician and salary payables). Click **Run checks**. If something differs, click **Resync ledger** in the header and check again.
- **Export** downloads the chart; **Disable** turns accounting off for the lab.



Posting rules: which account each operation uses.

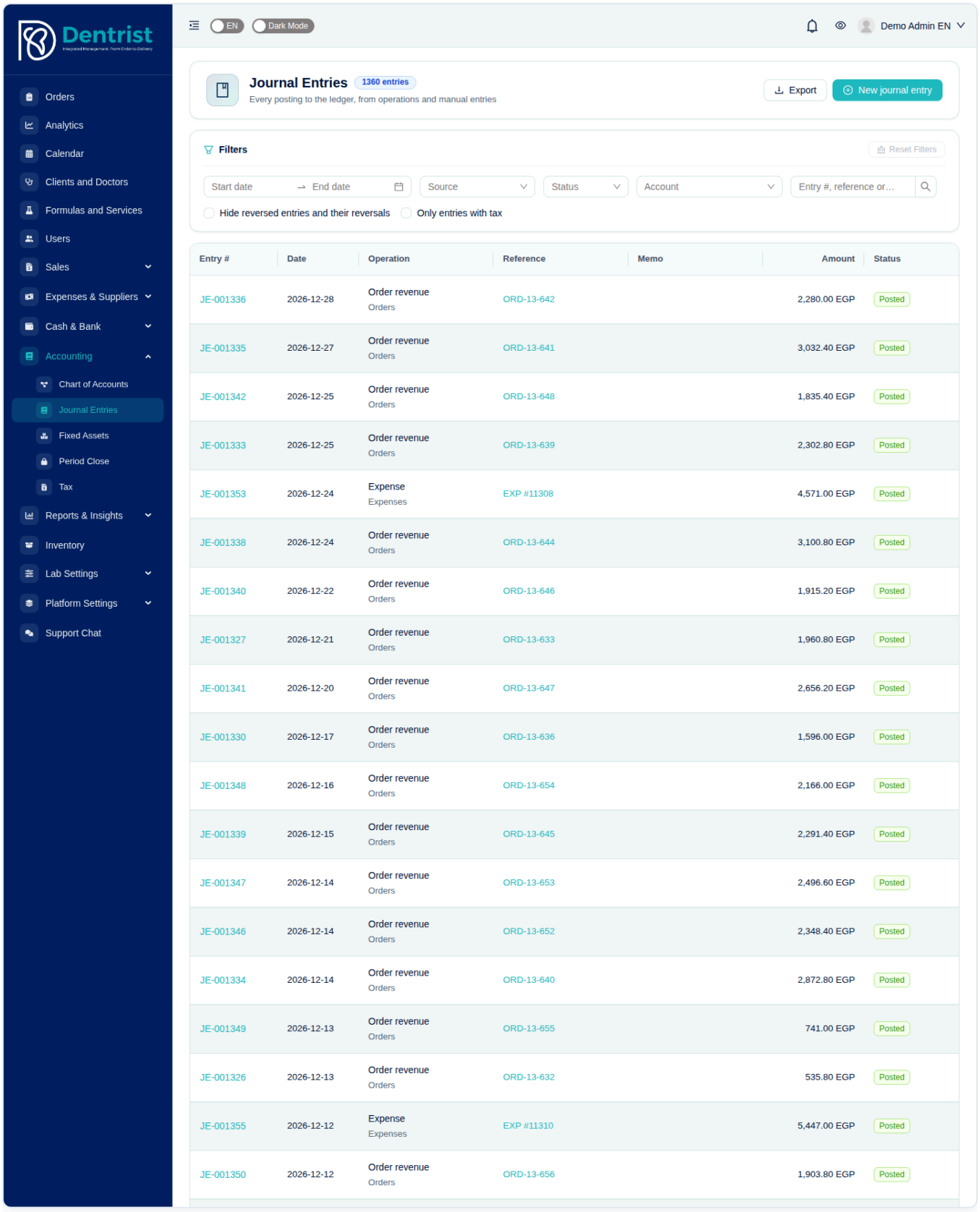


The ledger health check.

11.2 Journal entries

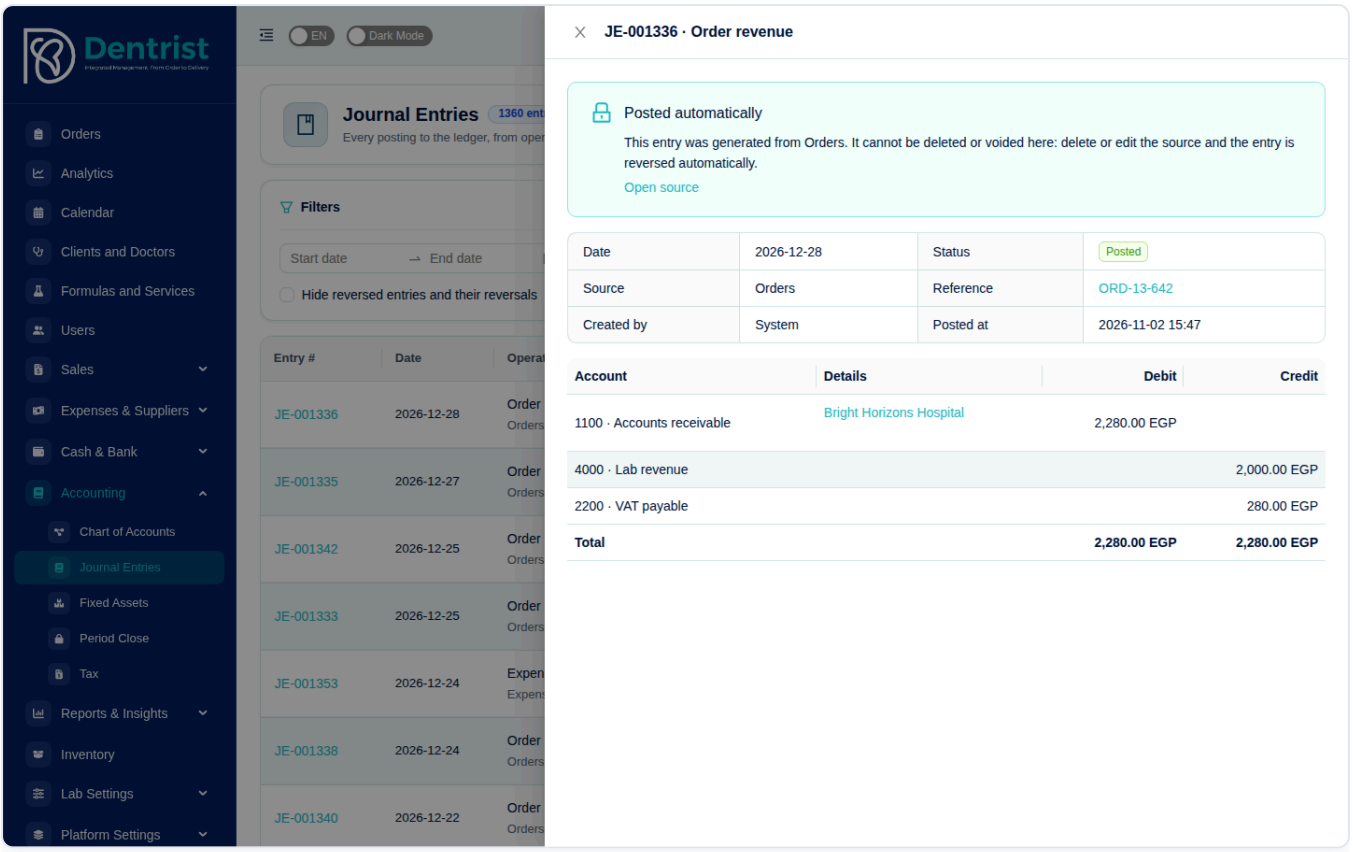
Menu: Accounting → Journal Entries

Every posting to the ledger, from operations and manual entries.



The journal with the operation, reference and amount of each entry.

Filter by date, source (orders, invoices, expenses…), status, account, or search by entry number or reference. Click an entry to see its lines (debits and credits). Click the reference to open the order, invoice or expense behind it.



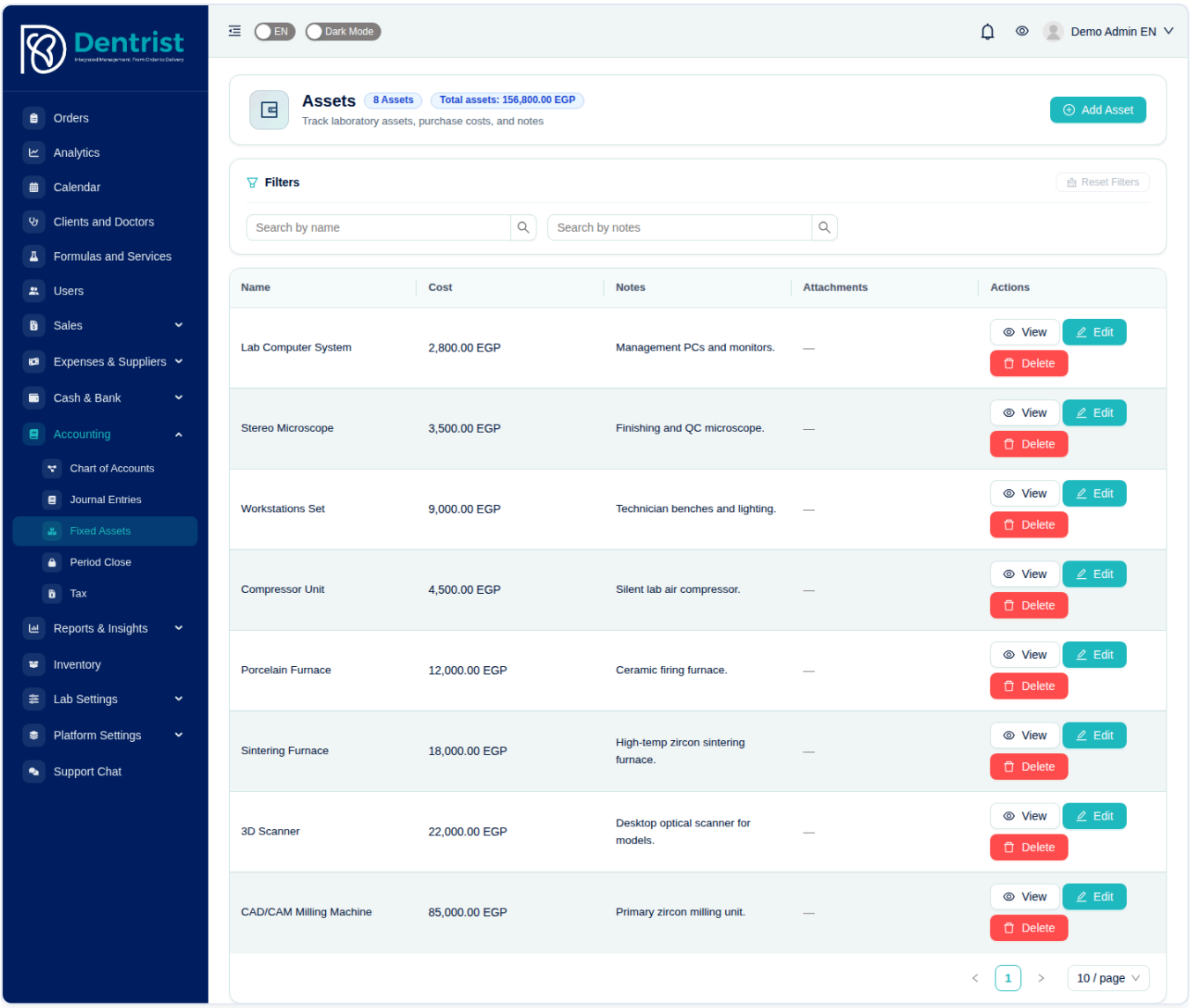
An entry's debit and credit lines.

- **New journal entry** records a manual entry (for example opening balances or an adjustment). Debits must equal credits.
- When an operation is edited, Dentrist never changes its old entry; it **reverses** it and posts a new revision. Tick **Hide reversed entries and their reversals** to see only the current picture.

11.3 Fixed assets

Menu: Accounting → Fixed Assets

Equipment the lab owns: milling machines, furnaces, scanners, computers… Record each asset with its cost, notes and attachments (invoice, warranty). The total value is shown at the top. Depreciation is used in Lab Costing to spread the equipment cost over orders.

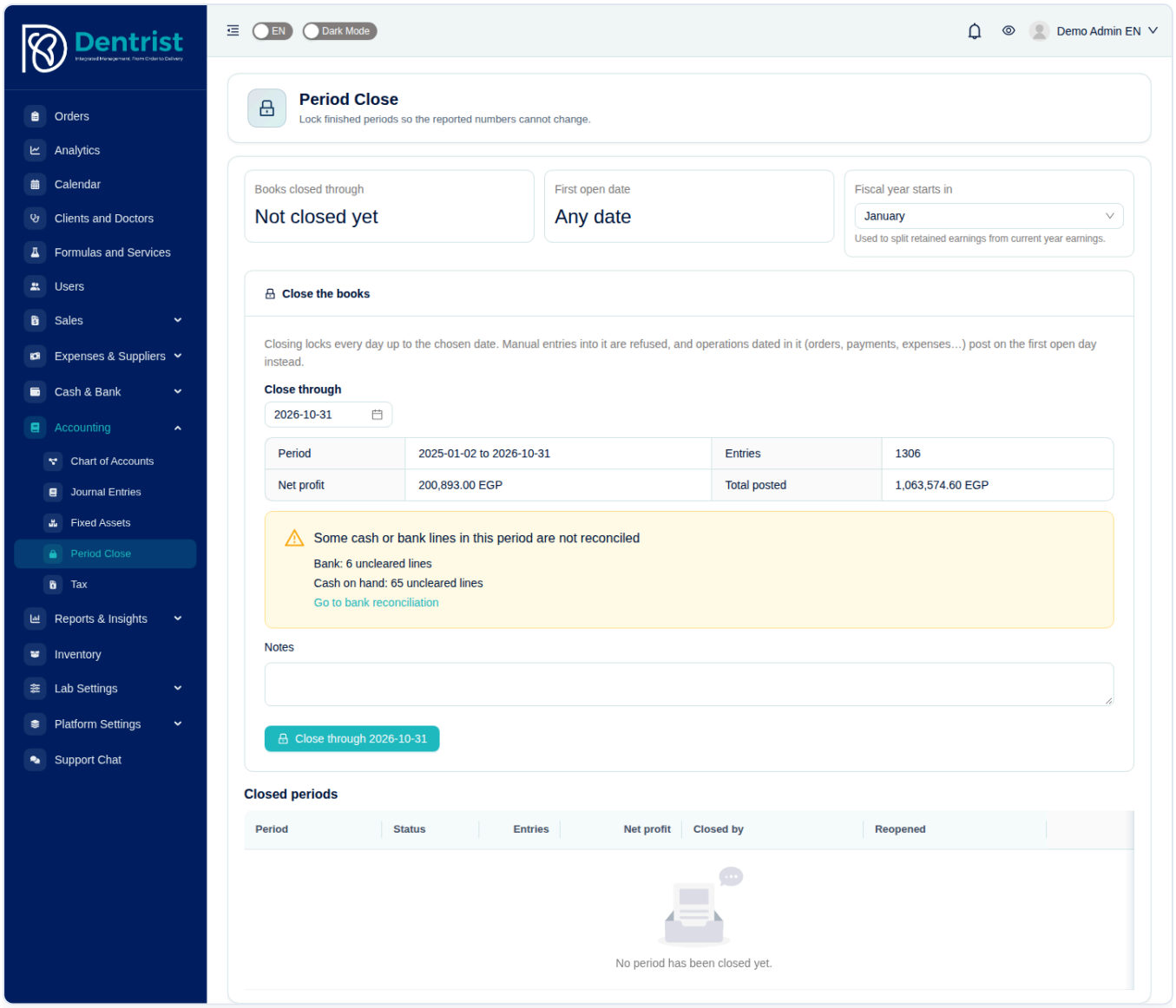


The lab's assets.

11.4 Period close

Menu: Accounting → Period Close

Lock finished periods so the reported numbers cannot change.



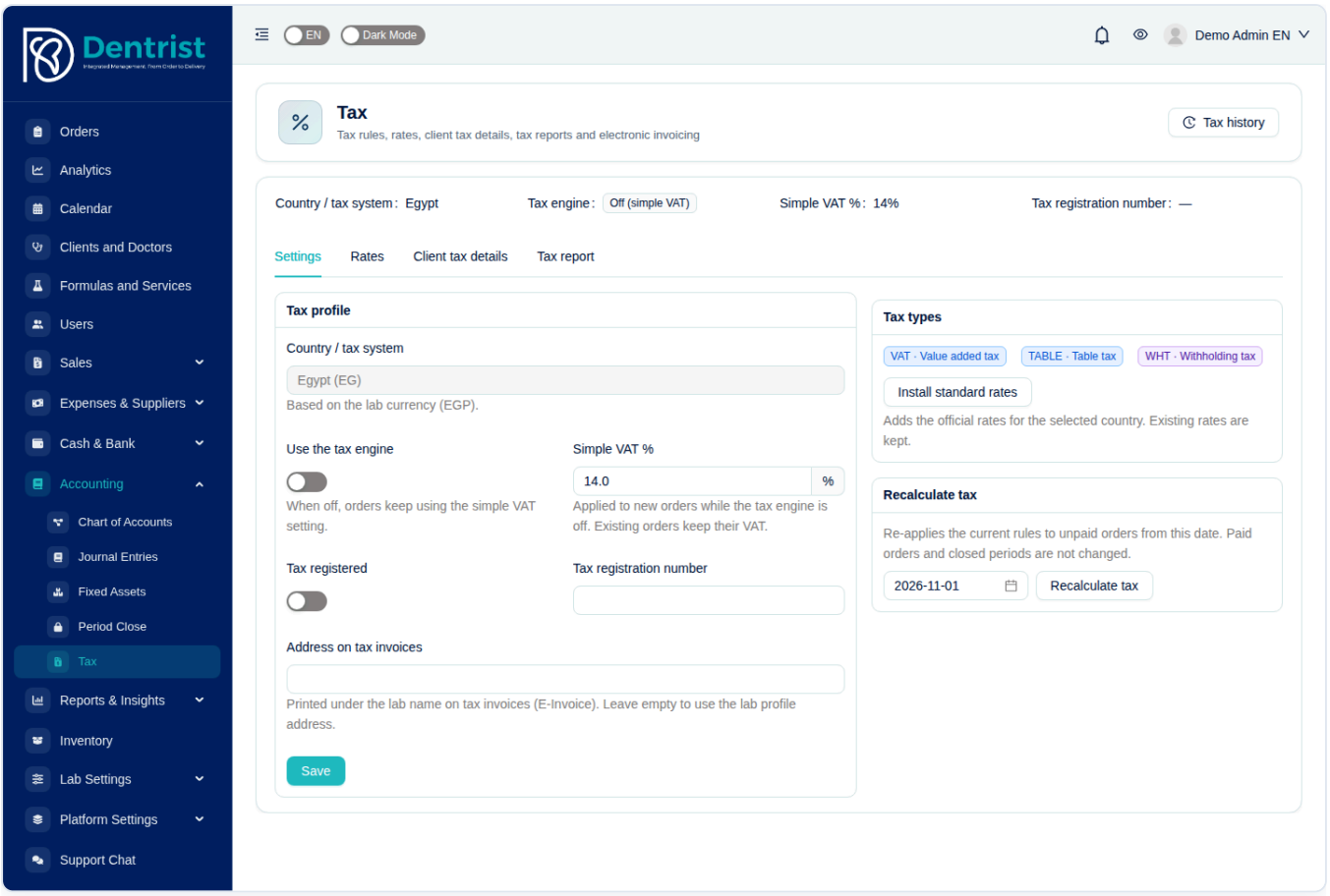
Closing the books through a date.

1. Choose **Close through** (for example the last day of last month).
2. Review the preview: period, number of entries, net profit and total posted. Dentrist warns you about cash and bank lines that are not reconciled.
3. Add notes and click **Close the books**.

After closing, manual entries into the closed period are refused, and operations dated in it post on the first open day instead. Set the month your **fiscal year starts in** on the same page.

11.5 Tax

Menu: Accounting → Tax



Tax settings: country, VAT rate, registration and tax types.

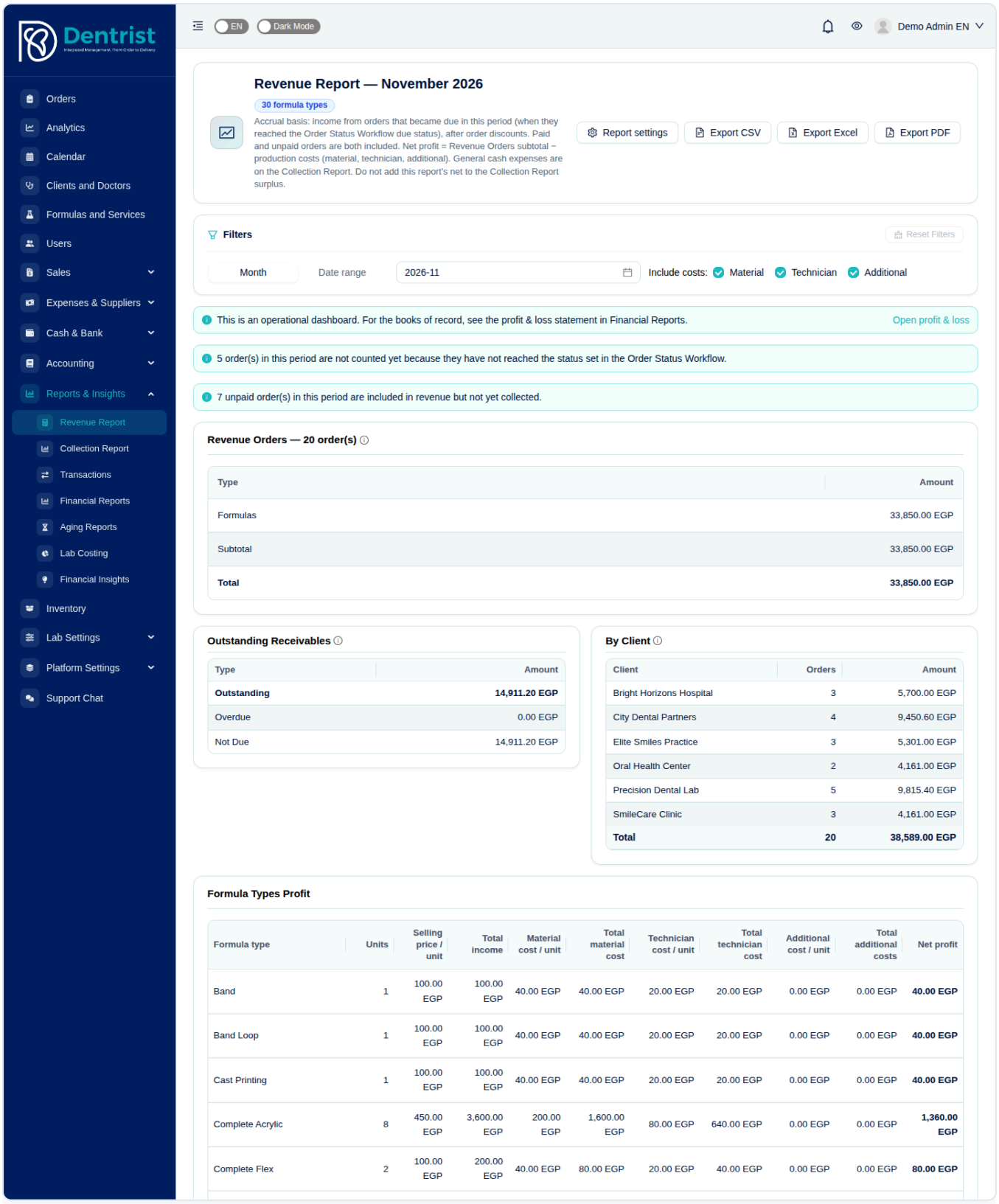
- **Settings:** the country tax system (taken from your currency), **Simple VAT %** used on new orders, whether the lab is **tax registered**, the registration number and the address printed on tax invoices. Turn on **Use the tax engine** for country-specific rules with several tax types (VAT, table tax, withholding tax).
- **Install standard rates** adds the official rates of your country.
- **Recalculate tax** re-applies the current rules to unpaid orders from a date.
- Tabs: **Rates**, **Client tax details** (clients' tax numbers and exemptions) and **Tax report** (tax collected and paid for a period).
- **Tax history** shows every change to the tax settings.

12. Reports and insights

12.1 Revenue report

Menu: Reports and Insights → Revenue Report

Income from orders that became due in the period (when they reached the billable status), paid or not, after discounts, with production costs and net profit per formula type.



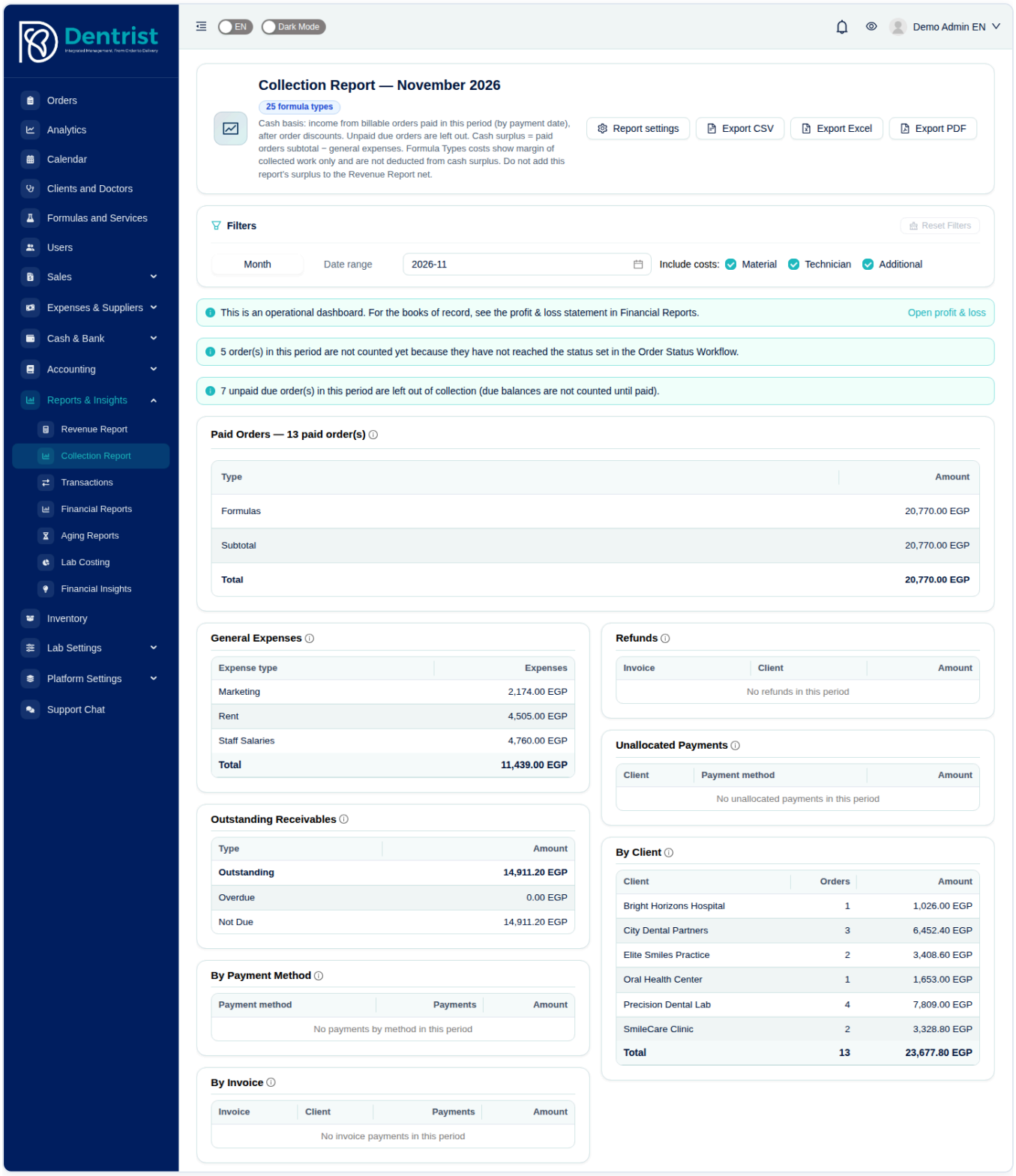
The revenue report for one month.

Choose **Month** or a **Date range**, tick which costs to include (material, technician, additional), and export to **CSV**, **Excel** or **PDF**. Notes at the top tell you how many orders are not counted yet because they have not reached the billable status, and how many unpaid orders are included.

12.2 Collection report

Menu: Reports and Insights → Collection Report

The cash view: income from orders actually **paid** in the period (by payment date), and the cash surplus after general expenses.



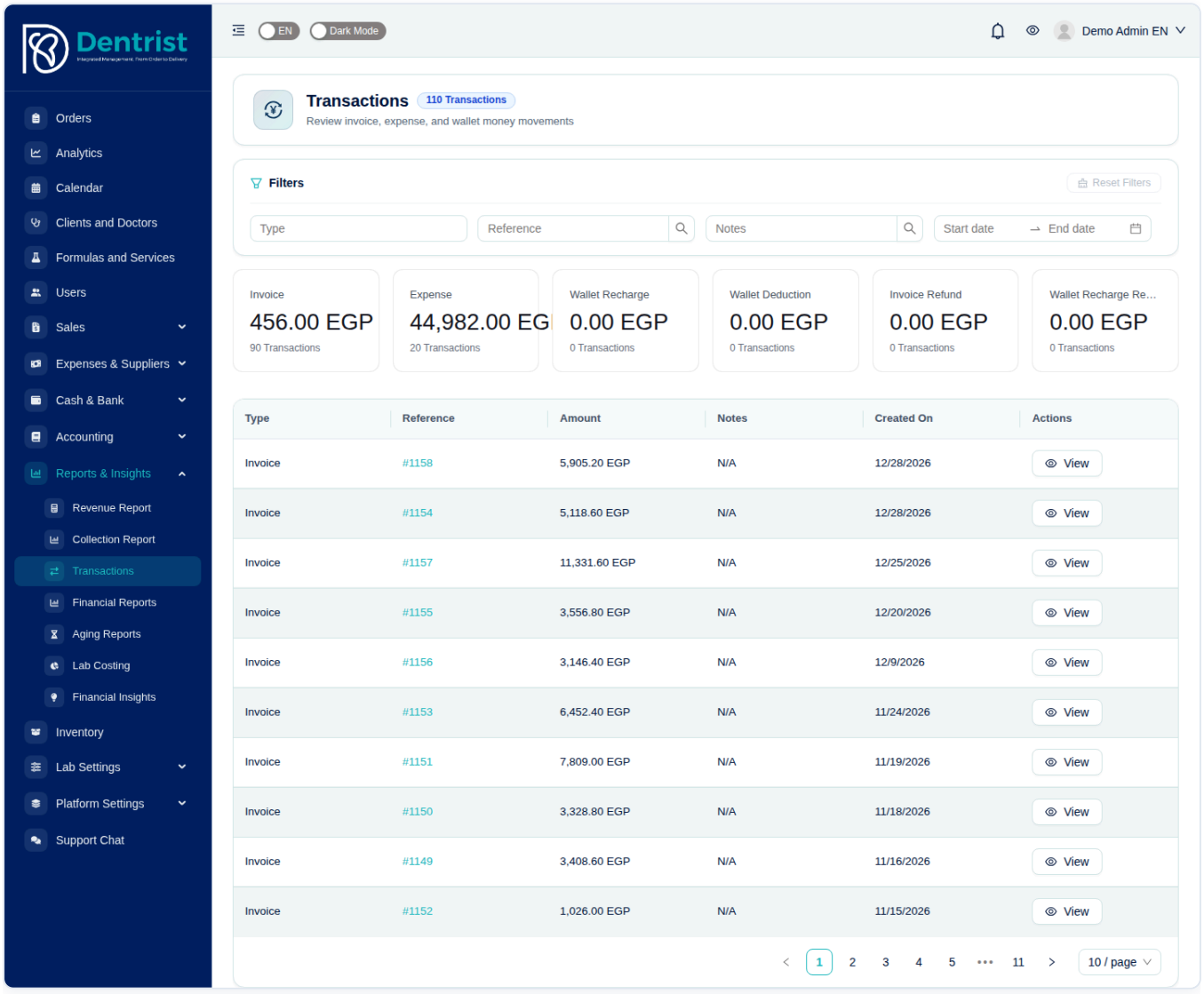
The collection report.

> **Revenue or collection?** Revenue is what you delivered and billed; collection is what you received. Do not add the two together.

12.3 Transactions

Menu: Reports and Insights → Transactions

Every money movement: invoice payments, expenses, wallet recharges and deductions, and refunds. The cards show the total and count per type. Filter by type, reference, notes and date.



The transactions list.

12.4 Financial reports

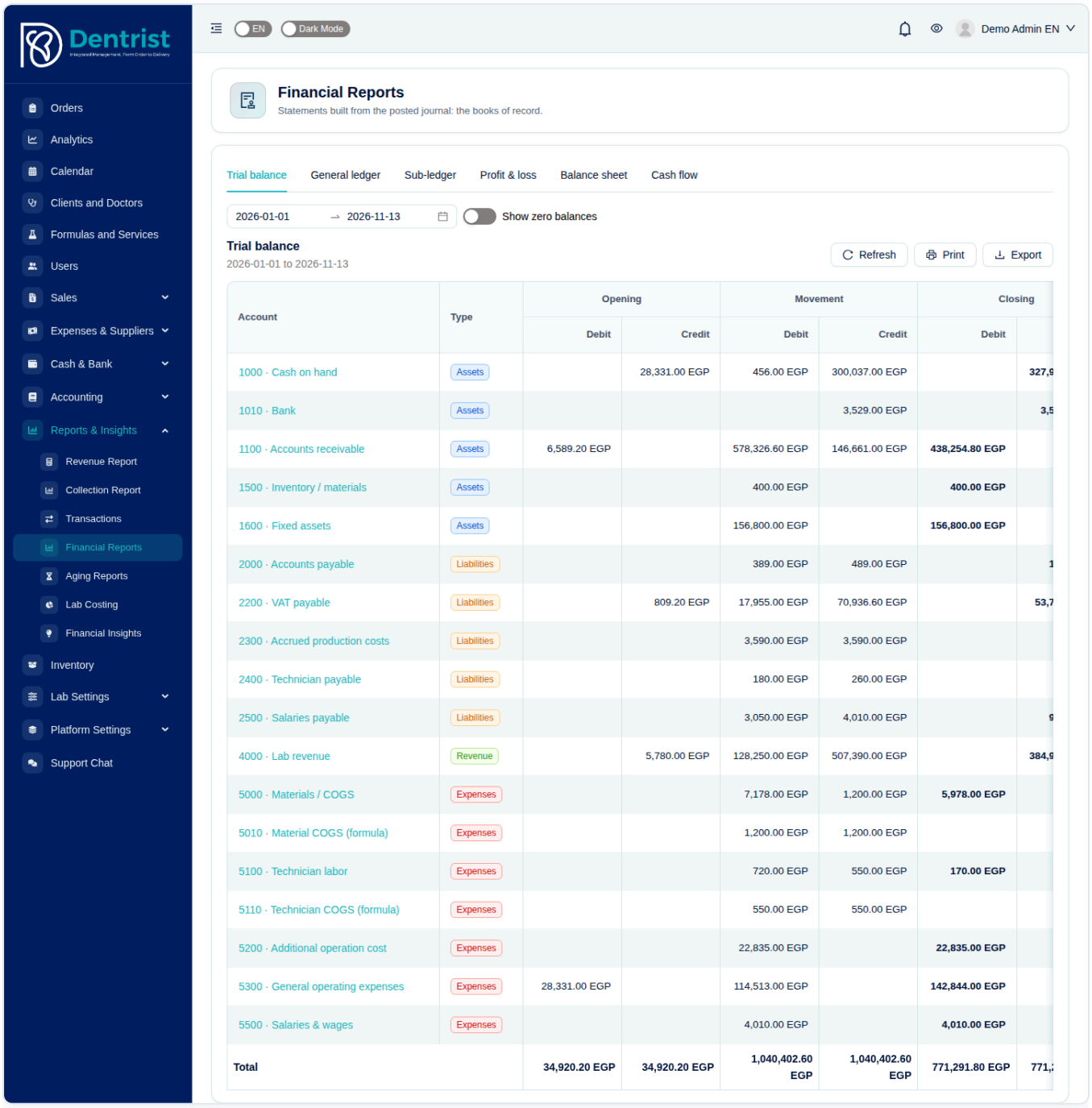
Menu: Reports and Insights → Financial Reports

The books of record, built from the posted journal. Choose the date range and use the tabs:

- **Trial balance:** opening, movement and closing debit and credit per account. It should always show *Balanced*.

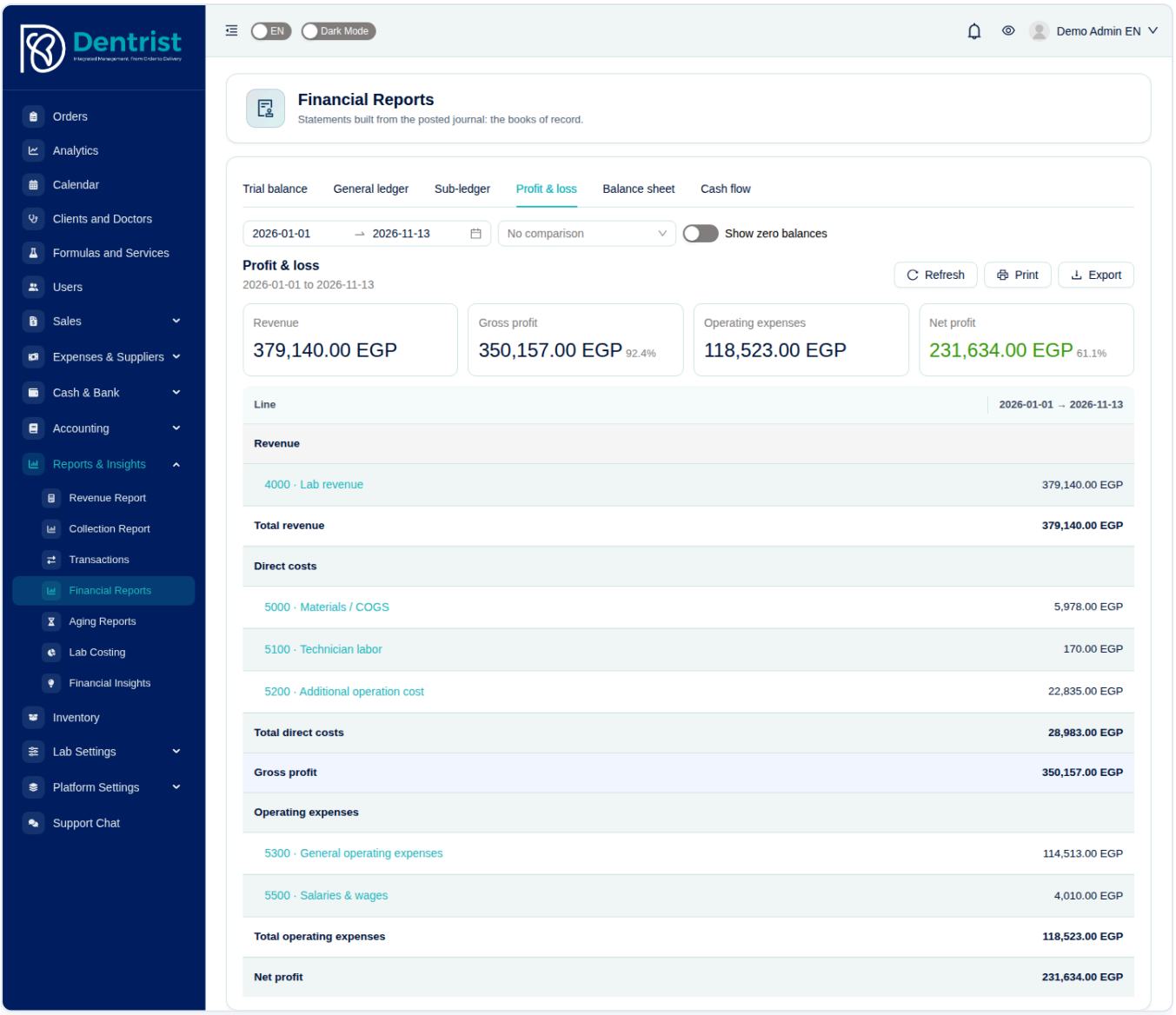
- **General ledger:** every line of every account.
- **Sub-ledger:** balances per client, supplier or technician.
- **Profit and loss:** revenue minus cost of sales and expenses.
- **Balance sheet:** assets, liabilities and equity.
- **Cash flow:** where cash came from and went.

Each tab has **Refresh**, **Print** and **Export**.

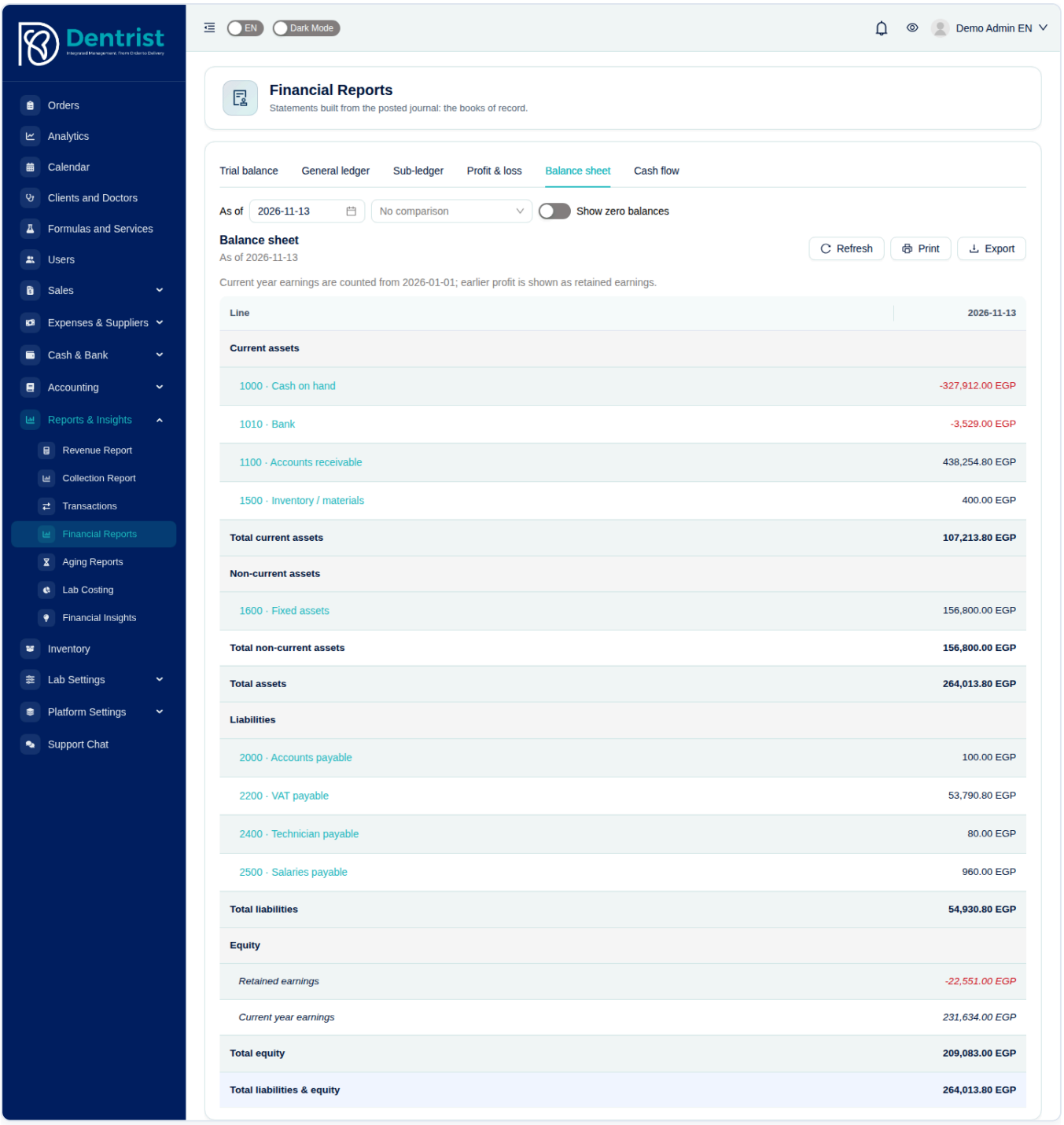


Account	Type	Opening		Movement		Closing	
		Debit	Credit	Debit	Credit	Debit	
1000 · Cash on hand	Assets		28,331.00 EGP	456.00 EGP	300,037.00 EGP		327,9
1010 · Bank	Assets				3,529.00 EGP		3,5
1100 · Accounts receivable	Assets	6,589.20 EGP		578,326.60 EGP	146,661.00 EGP	**438,254.80 EGP**	
1500 · Inventory / materials	Assets			400.00 EGP		**400.00 EGP**	
1600 · Fixed assets	Assets			156,800.00 EGP		**156,800.00 EGP**	
2000 · Accounts payable	Liabilities			389.00 EGP	489.00 EGP		1
2200 · VAT payable	Liabilities		809.20 EGP	17,955.00 EGP	70,936.60 EGP		53,7
2300 · Accrued production costs	Liabilities			3,590.00 EGP	3,590.00 EGP		
2400 · Technician payable	Liabilities			180.00 EGP	260.00 EGP		
2500 · Salaries payable	Liabilities			3,050.00 EGP	4,010.00 EGP		9
4000 · Lab revenue	Revenue		5,780.00 EGP	128,250.00 EGP	507,390.00 EGP		384,9
5000 · Materials / COGS	Expenses			7,178.00 EGP	1,200.00 EGP	**5,978.00 EGP**	
5010 · Material COGS (formula)	Expenses			1,200.00 EGP	1,200.00 EGP		
5100 · Technician labor	Expenses			720.00 EGP	550.00 EGP	**170.00 EGP**	
5110 · Technician COGS (formula)	Expenses			550.00 EGP	550.00 EGP		
5200 · Additional operation cost	Expenses			22,835.00 EGP		**22,835.00 EGP**	
5300 · General operating expenses	Expenses	28,331.00 EGP		114,513.00 EGP		**142,844.00 EGP**	
5500 · Salaries & wages	Expenses			4,010.00 EGP		**4,010.00 EGP**	
Total		**34,920.20 EGP**	**34,920.20 EGP**	**1,040,402.60 EGP**	**1,040,402.60 EGP**	**771,291.80 EGP**	771,:

The trial balance.



The profit and loss statement.



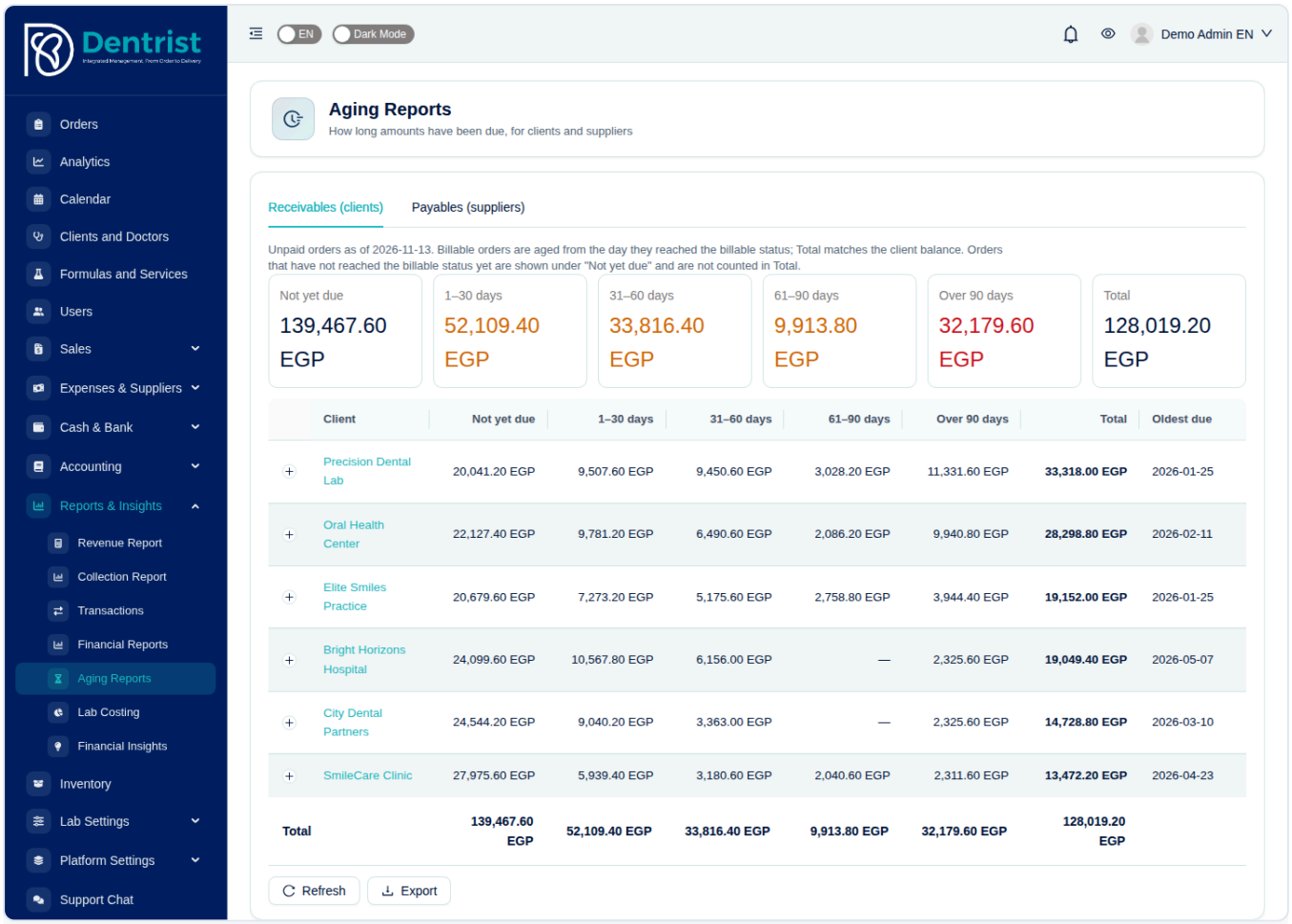
The balance sheet.

12.5 Aging reports

Menu: Reports and Insights → Aging Reports

How long amounts have been due, in buckets: not yet due, 1–30 days, 31–60, 61–90 and over 90 days.

- **Receivables (clients):** who owes you, and how late. Click **+** on a client to see the orders behind the amounts.
- **Payables (suppliers):** whom you owe.

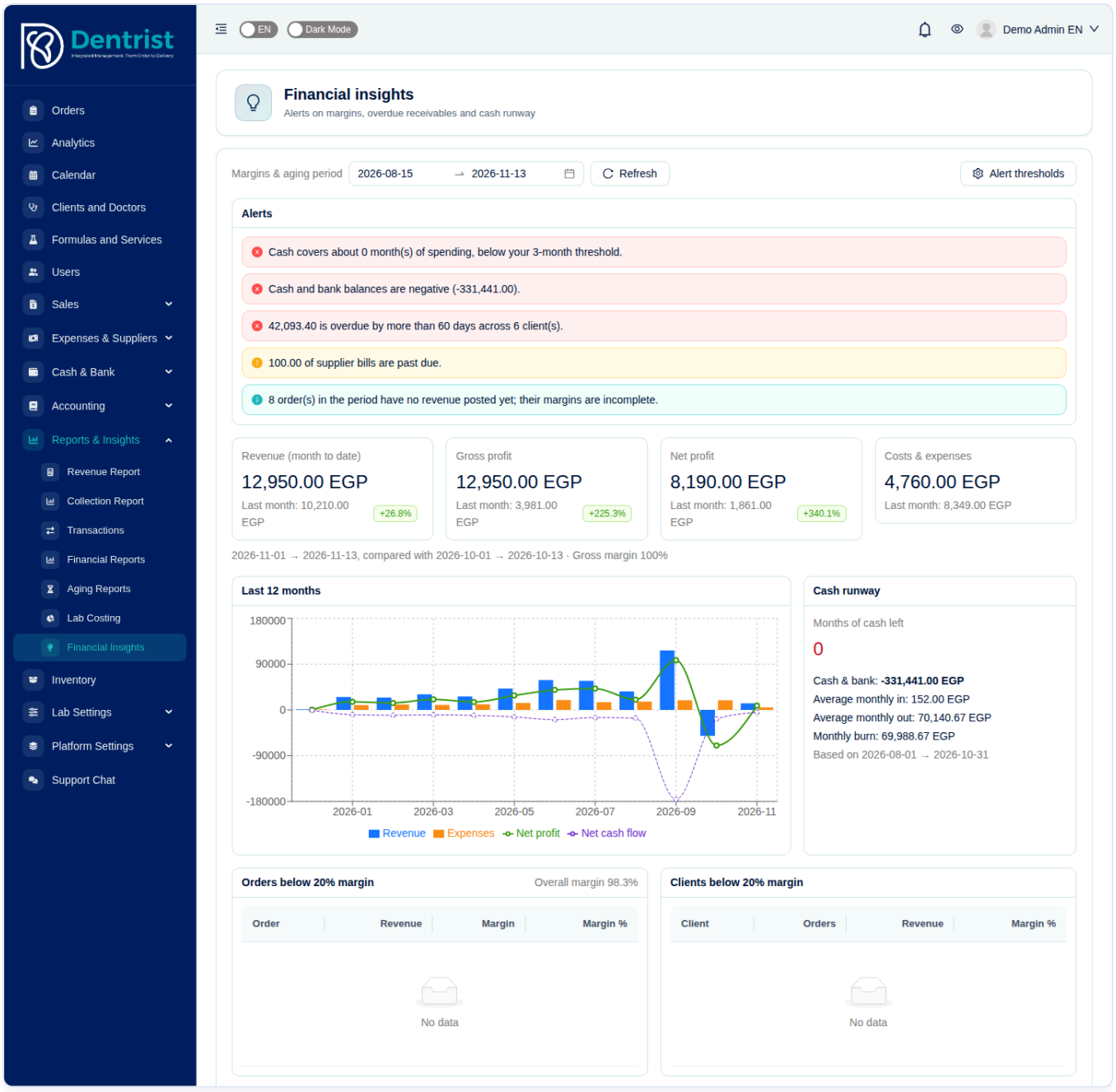


Receivables aging per client.

12.6 Financial insights

Menu: Reports and Insights → Financial Insights

Automatic alerts and KPIs computed from the ledger: low cash runway, negative balances, overdue receivables, past-due supplier bills, low-margin orders and clients, revenue, gross and net profit compared with last month, a 12-month trend and cash runway. Click **Alert thresholds** to set when each alert appears.

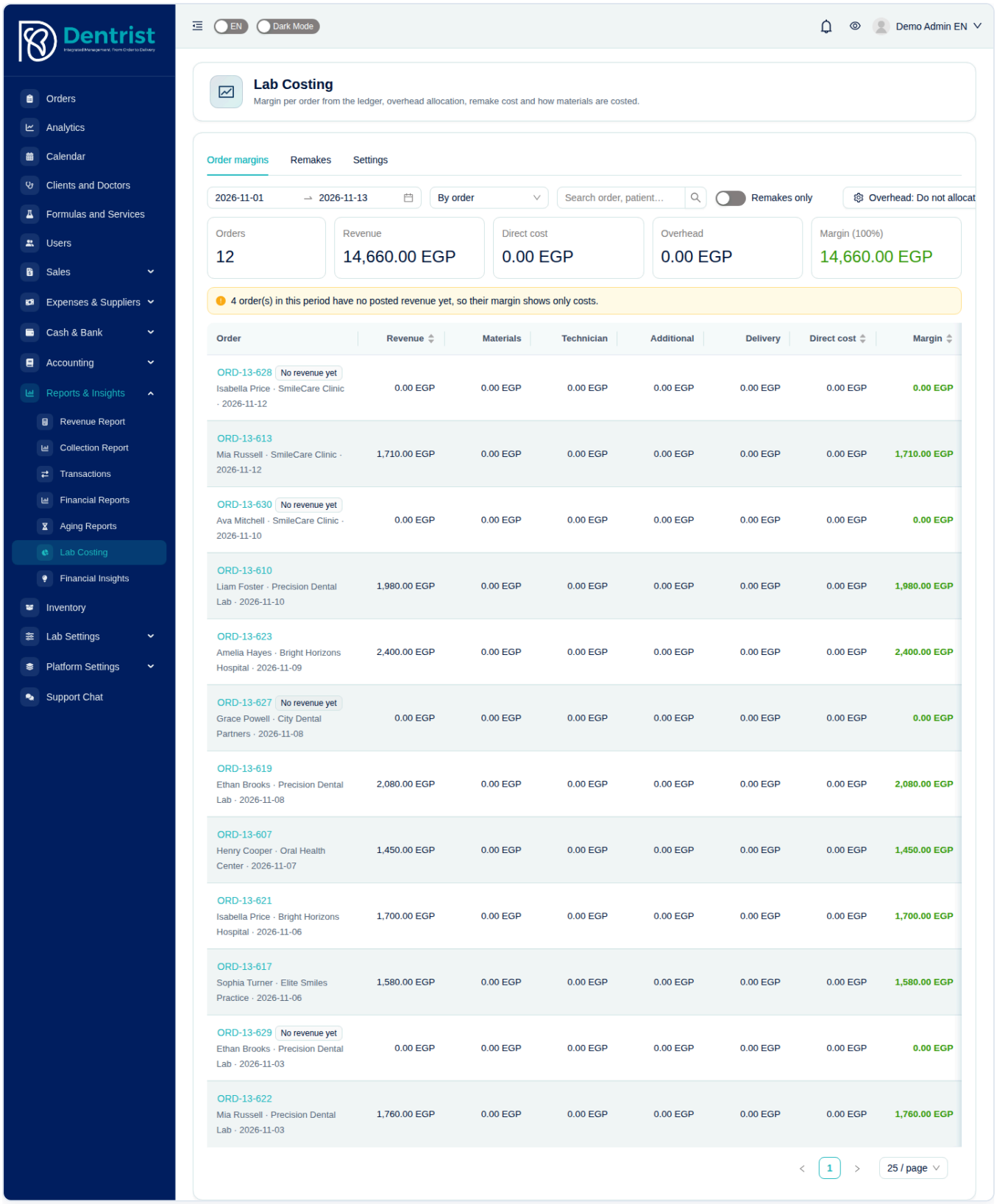


Alerts and key figures.

12.7 Lab costing

Menu: Reports and Insights → Lab Costing

Which orders, clients, technicians and formula types make money.



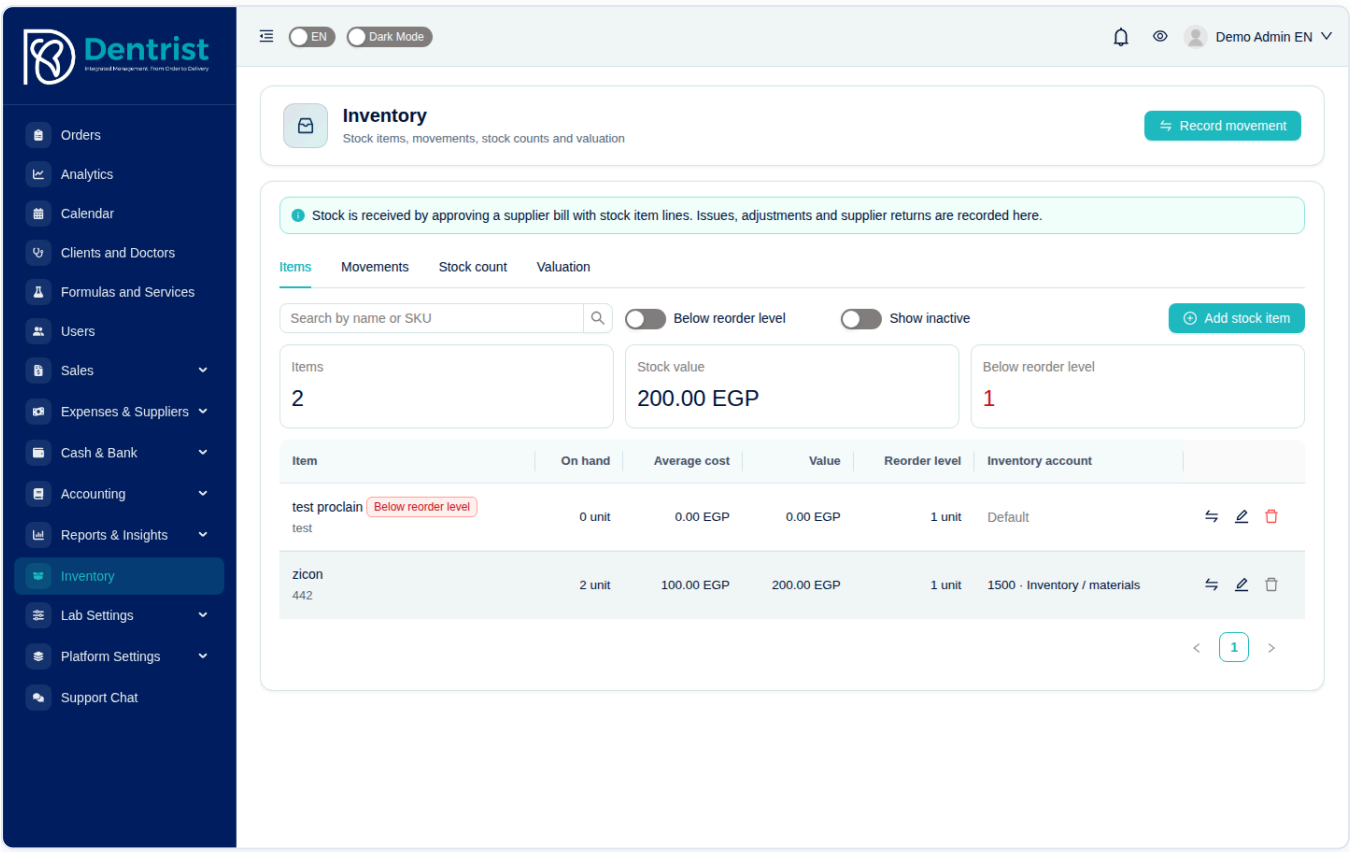
Margin per order: revenue, materials, technician, additional and delivery costs.

- **Order margins:** revenue and direct costs per order (or grouped by client, technician or formula type), with the margin. Use **Overhead** to spread general expenses and equipment depreciation over orders.
- **Remakes:** how many remakes you had, why, and what they cost.
- **Settings:** how materials are costed (as stock or as direct expense).

12.8 Inventory

Menu: Inventory

Stock of materials (zirconia blocks, porcelain, implants parts…) at moving average cost.



Stock items with quantity on hand, average cost, value and reorder level.

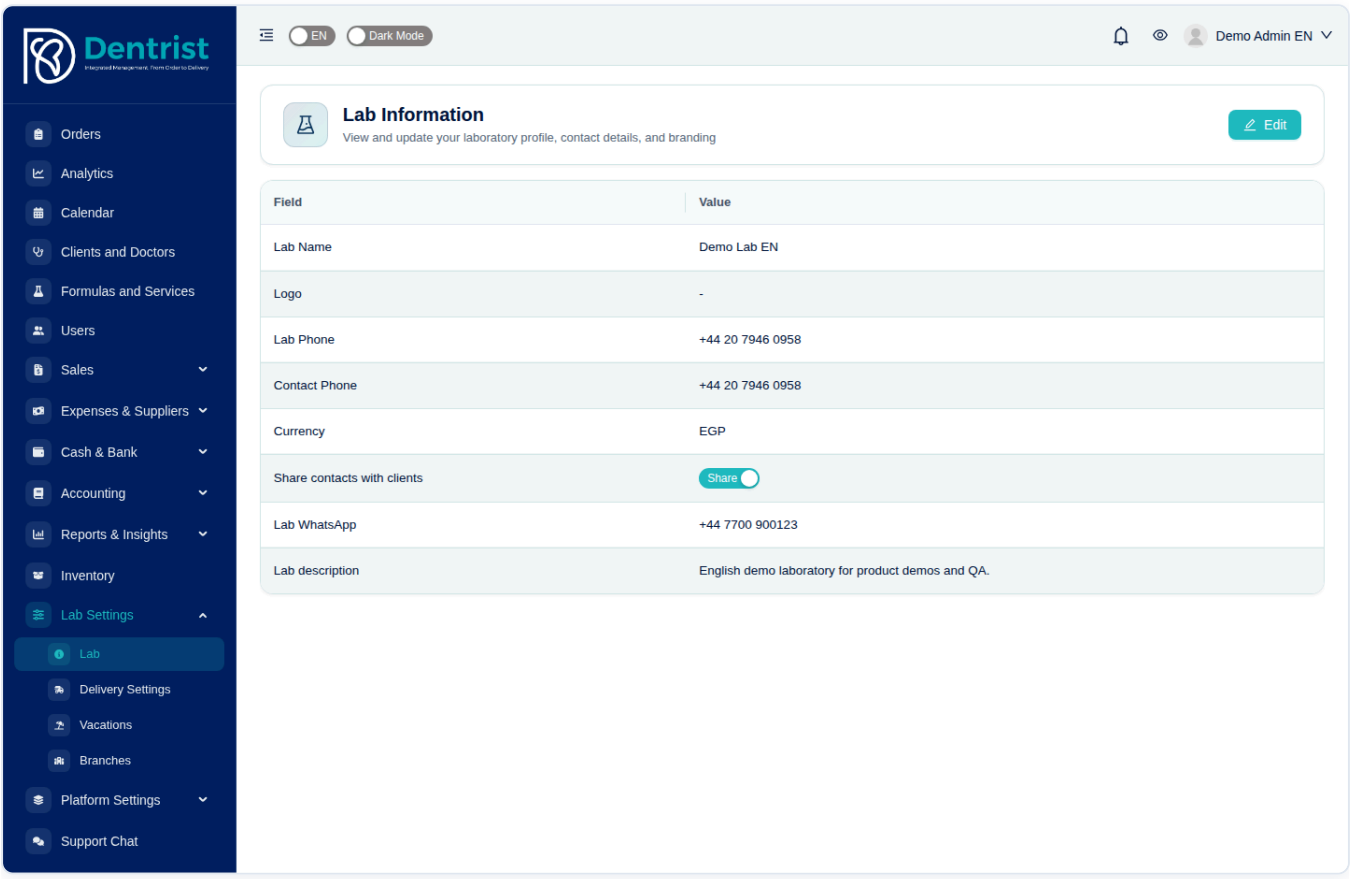
- **Items:** add stock items with SKU, unit, reorder level and inventory account. Items below their reorder level are flagged.
- Stock comes in when you approve a **supplier bill** with stock item lines.
- **Record movement** issues material to an order (its cost goes to that order's margin), adjusts stock, or returns it to a supplier.
- **Movements**, **Stock count** (count and correct stock) and **Valuation** (value of stock on a date) tabs.

13. Lab and platform settings

13.1 Lab information

Menu: Lab Settings → Lab

Your lab's name, logo, phones, WhatsApp, currency and description. Turn on **Share contacts with clients** to show your contacts in the dentist portal. Click **Edit** to change them. The logo appears in the top bar and on invoices.

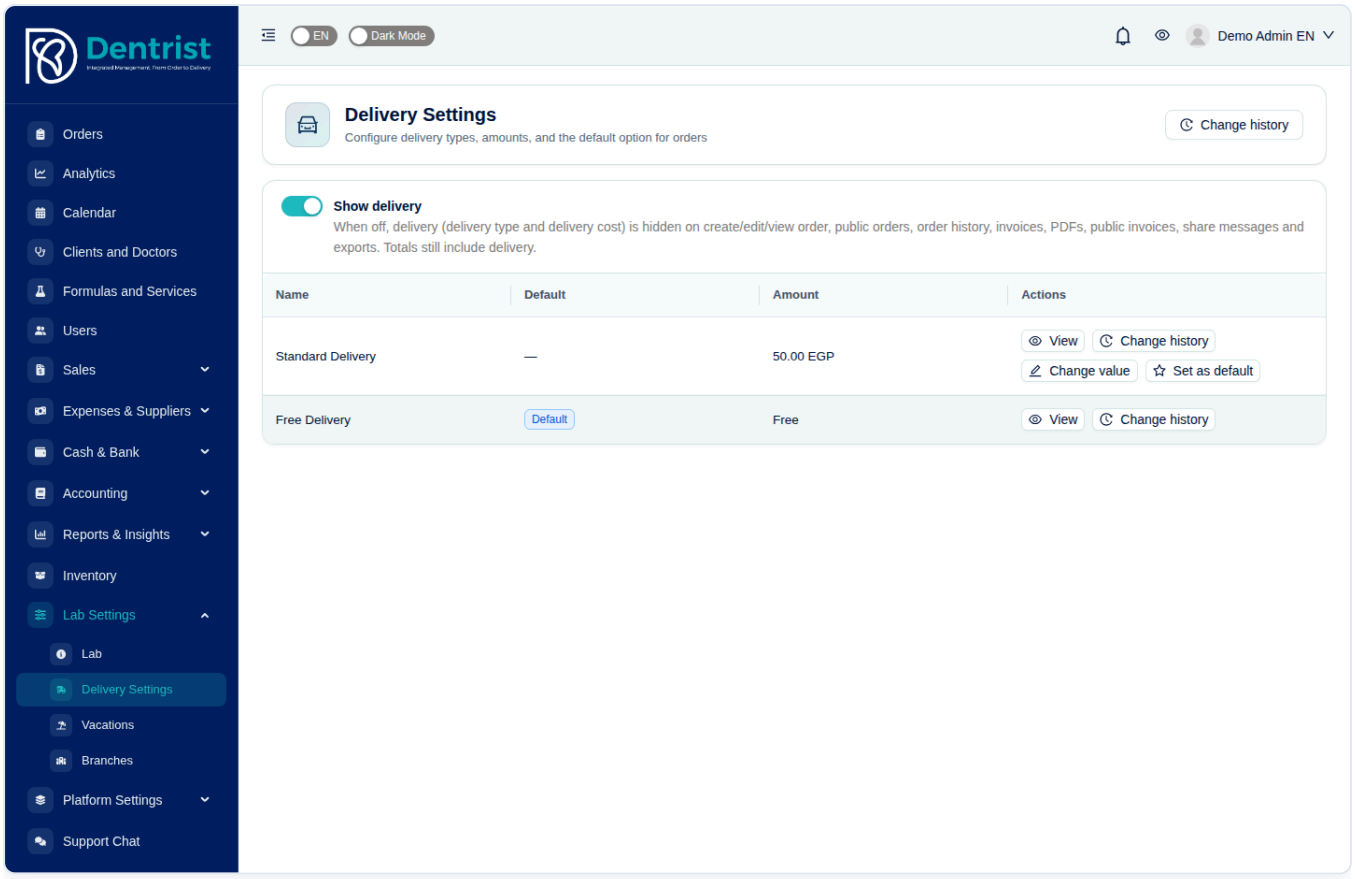


The lab profile.

13.2 Delivery settings

Menu: Lab Settings → Delivery Settings

Delivery types and their price (for example *Standard Delivery* 50, *Free Delivery*). The **Default** type is used on new orders. Use **Change value**, **Set as default** and **Change history** on each type. Turn off **Show delivery** to hide delivery from orders, invoices and PDFs (totals still include it).

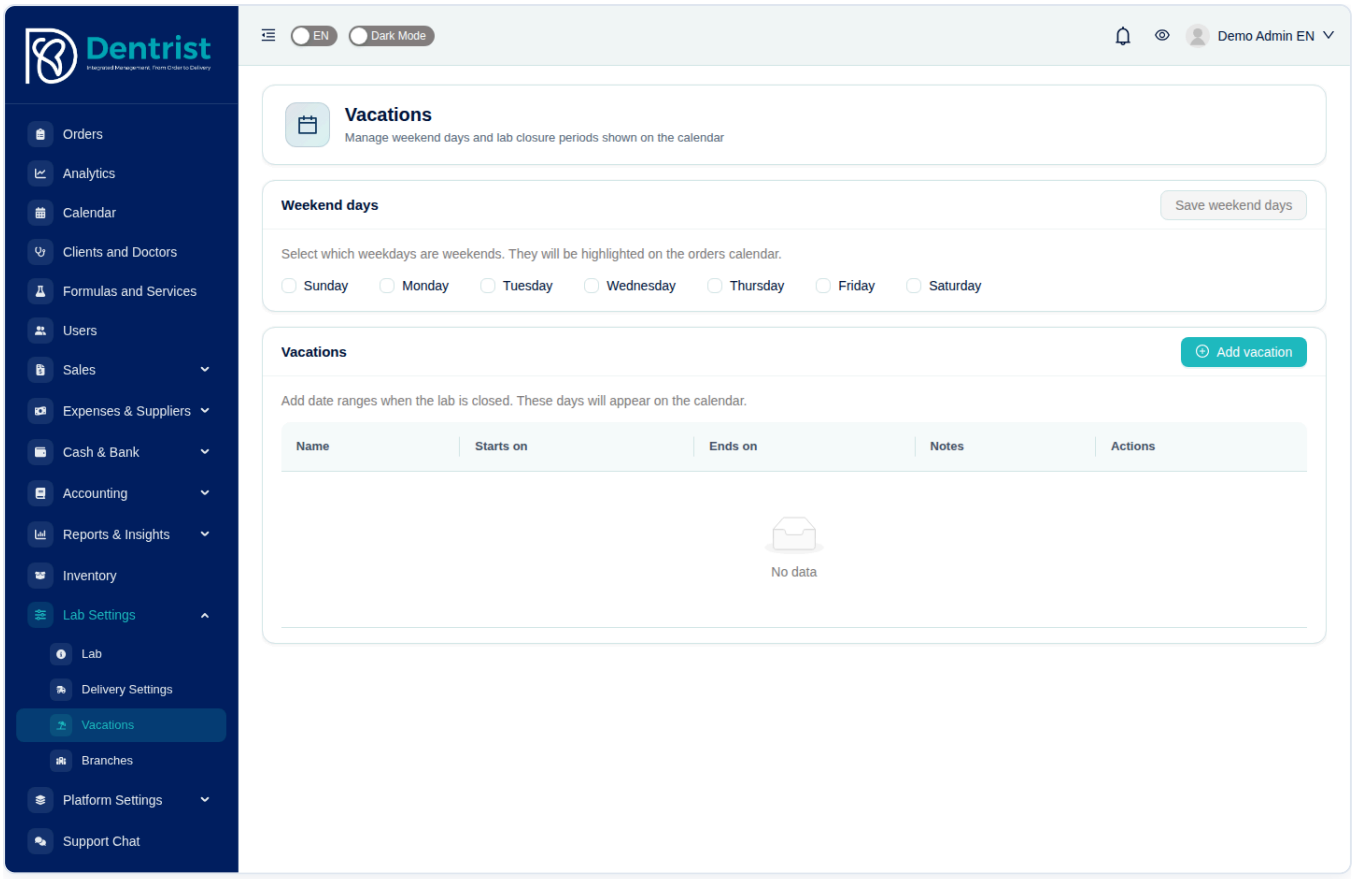


Delivery types.

13.3 Vacations

Menu: Lab Settings → Vacations

Tick your **weekend days** and add **vacations** (date ranges when the lab is closed). They are highlighted on the calendar and taken into account when suggesting delivery dates.

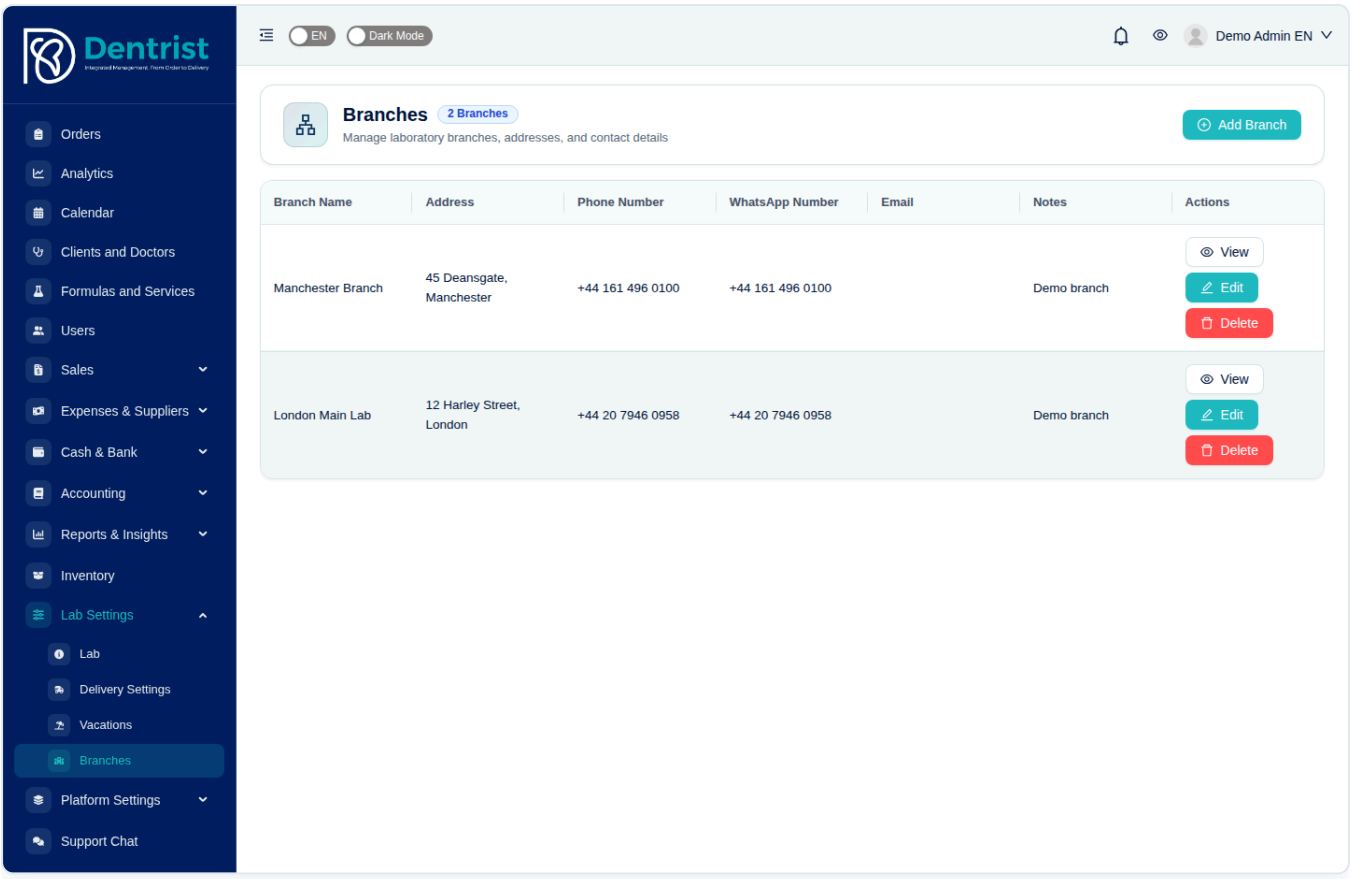


Weekend days and lab closures.

13.4 Branches

Menu: Lab Settings → Branches

The lab's branches with address, phone, WhatsApp, email and notes.

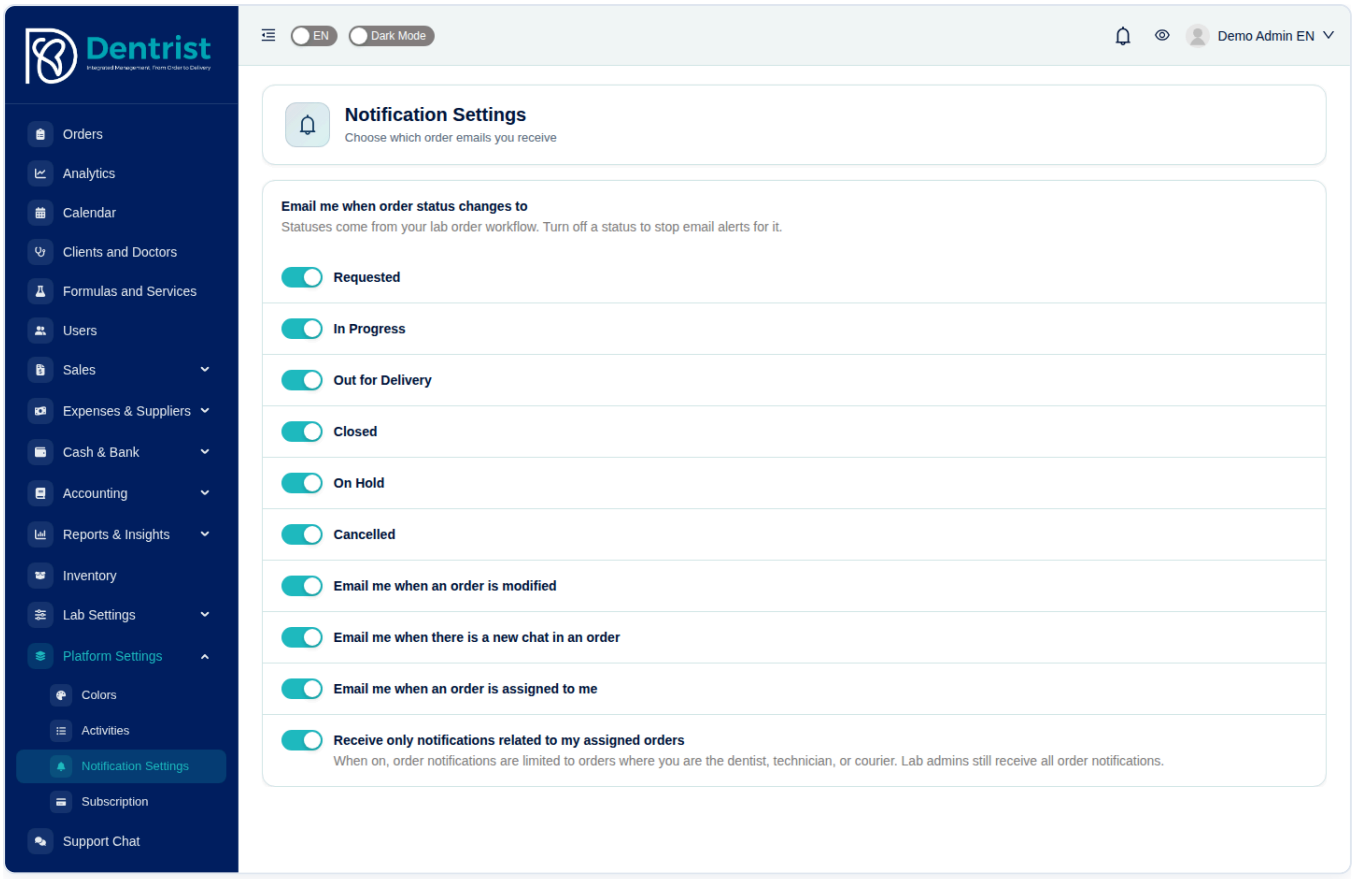


Lab branches.

13.5 Notification settings

Menu: Platform Settings → Notification Settings

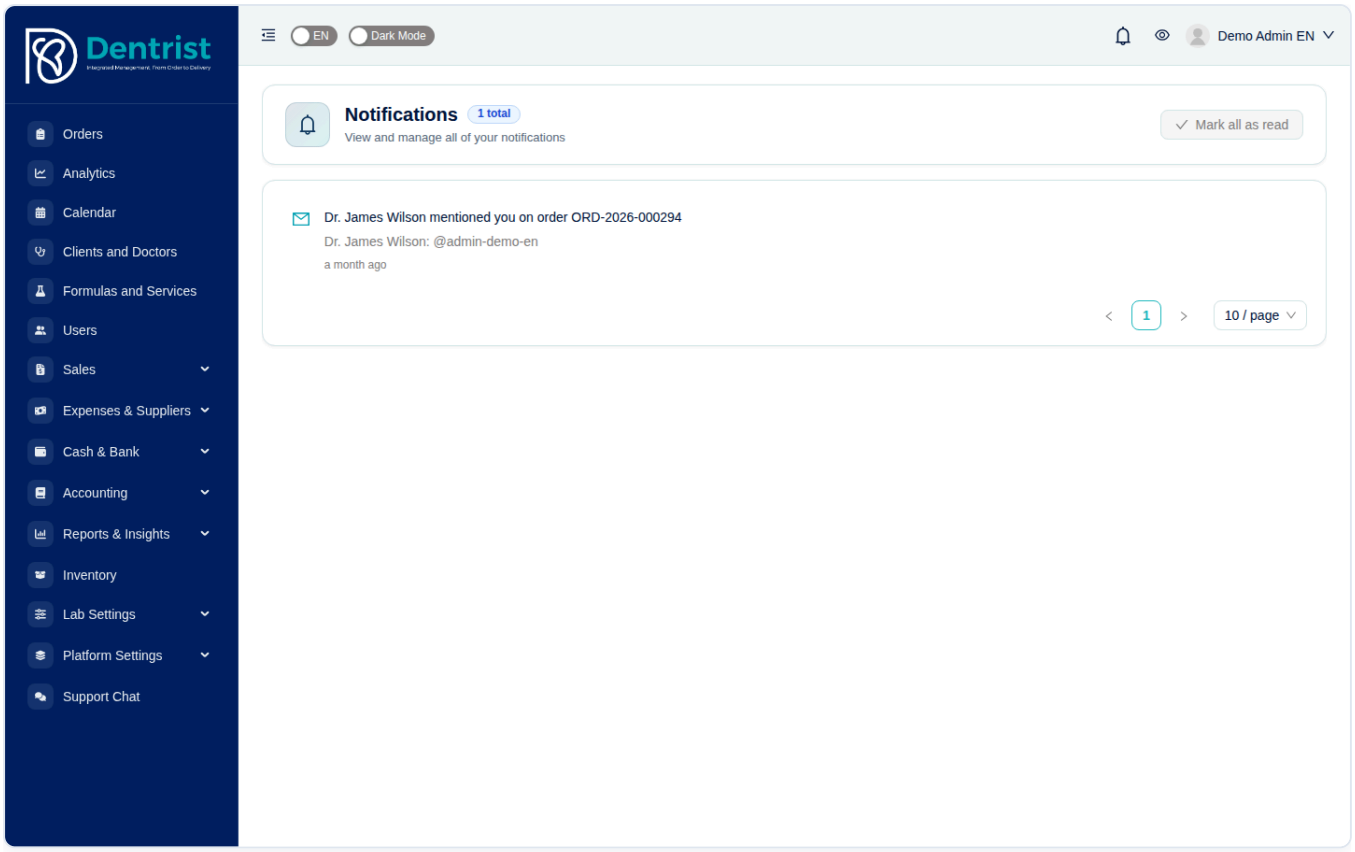
Choose which emails you receive: when an order moves to each status, when an order is modified, when there is a new chat message in an order, and when an order is assigned to you. Turn on **Receive only notifications related to my assigned orders** to limit them to your own orders.



Personal email notification preferences.

13.6 Notifications

Click the **bell** in the top bar to see your latest notifications, or open the full **Notifications** page. Click a notification to open the order or invoice it is about. **Mark all as read** clears the counter.

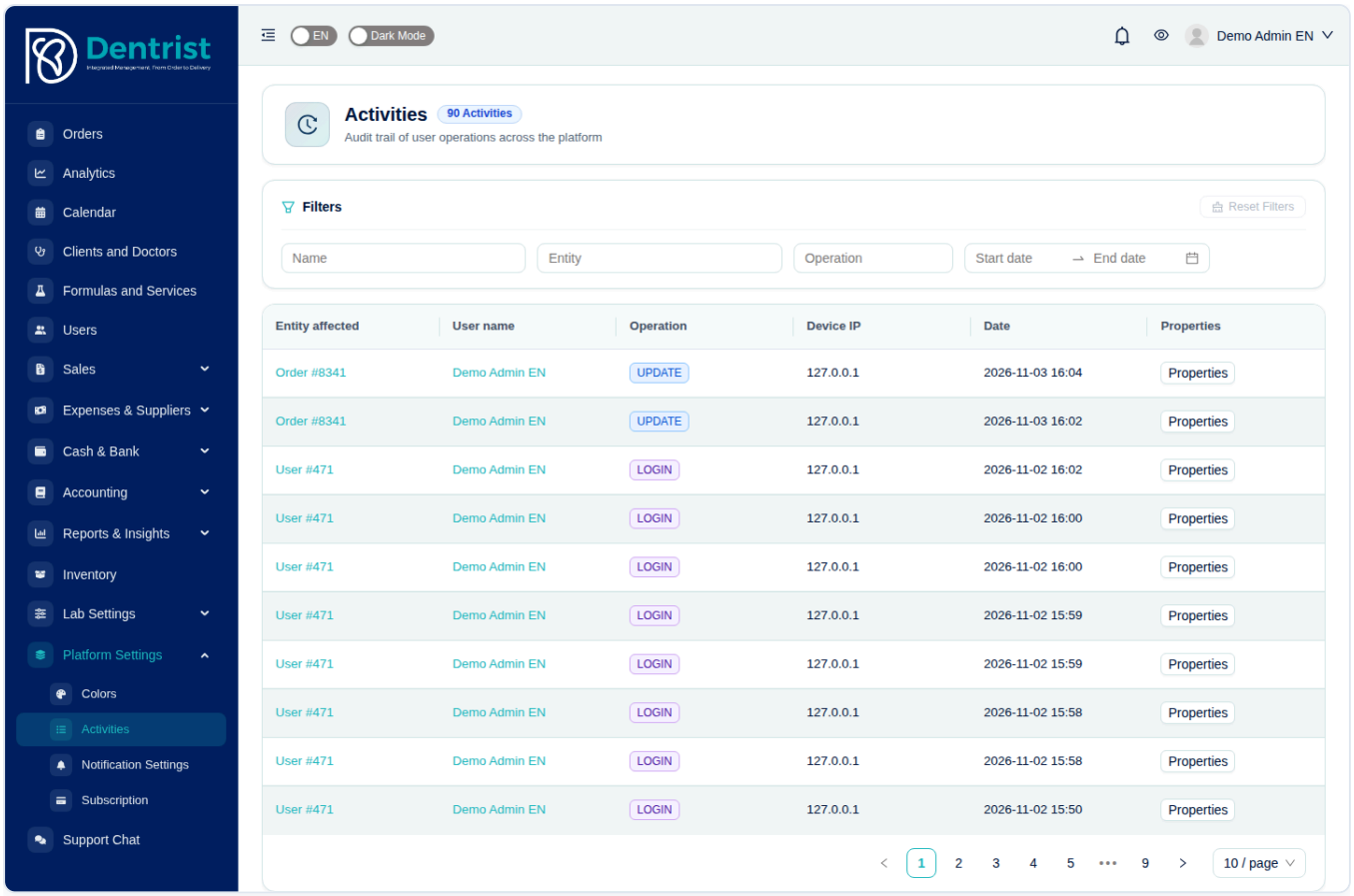


The notifications page.

13.7 Activities (audit log)

Menu: Platform Settings → Activities

The audit trail of who did what and when: every create, update, delete, login and logout, with the user, entity, device IP and date. Click **Properties** to see exactly what changed. Filter by user name, entity, operation and date.

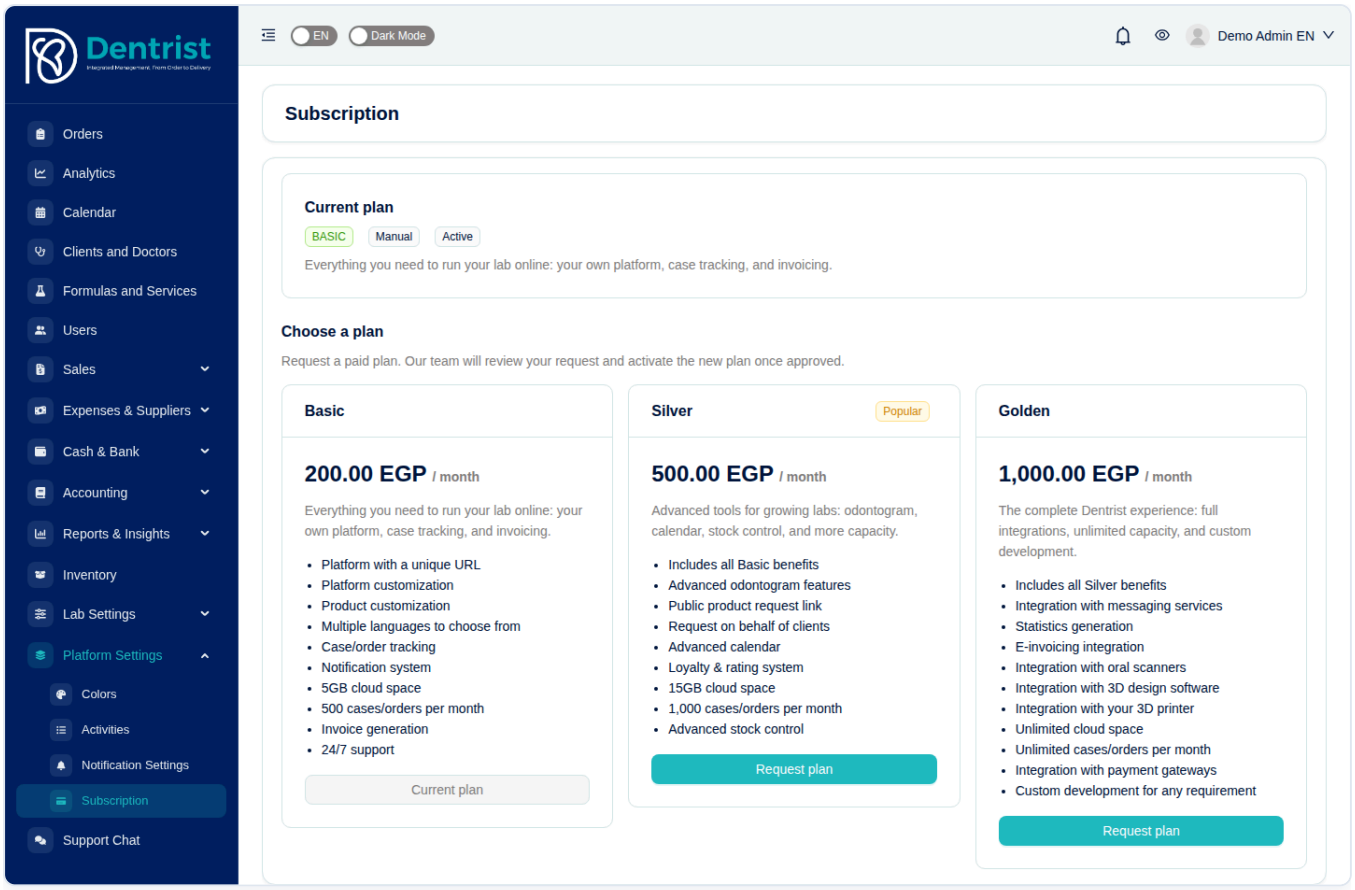


The audit log.

13.8 Subscription

Menu: Platform Settings → Subscription

Your current plan and its status, and the available plans with their prices and features. Click **Request plan** to ask for an upgrade; the Dentrist team reviews the request and activates the new plan.



The current plan and the available plans.

13.9 Support chat

Menu: Support Chat

Chat directly with the Dentrist support team. Type your question, attach a screenshot if helpful, and click **Send**. Replies arrive in the same conversation, usually within a few hours.



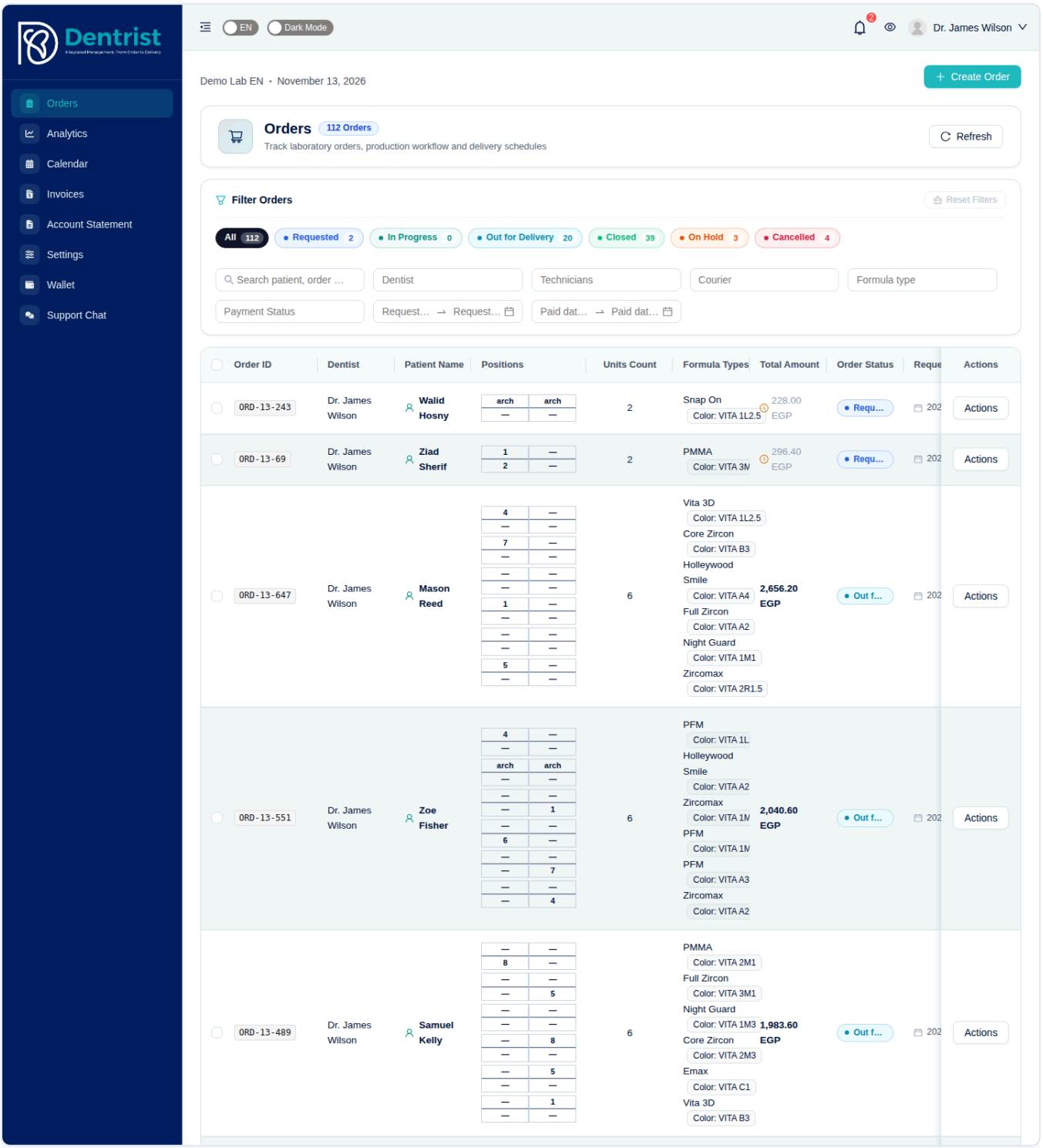
Chatting with Dentrist support.

14. The dentist portal

Dentists sign in on the same page as the lab staff. Dentrist recognizes them and shows the **dentist portal**, with a shorter menu focused on their own cases and account: **Orders**, **Analytics**, **Calendar**, **Invoices**, **Account Statement**, **Settings**, **Wallet** and **Support Chat**.

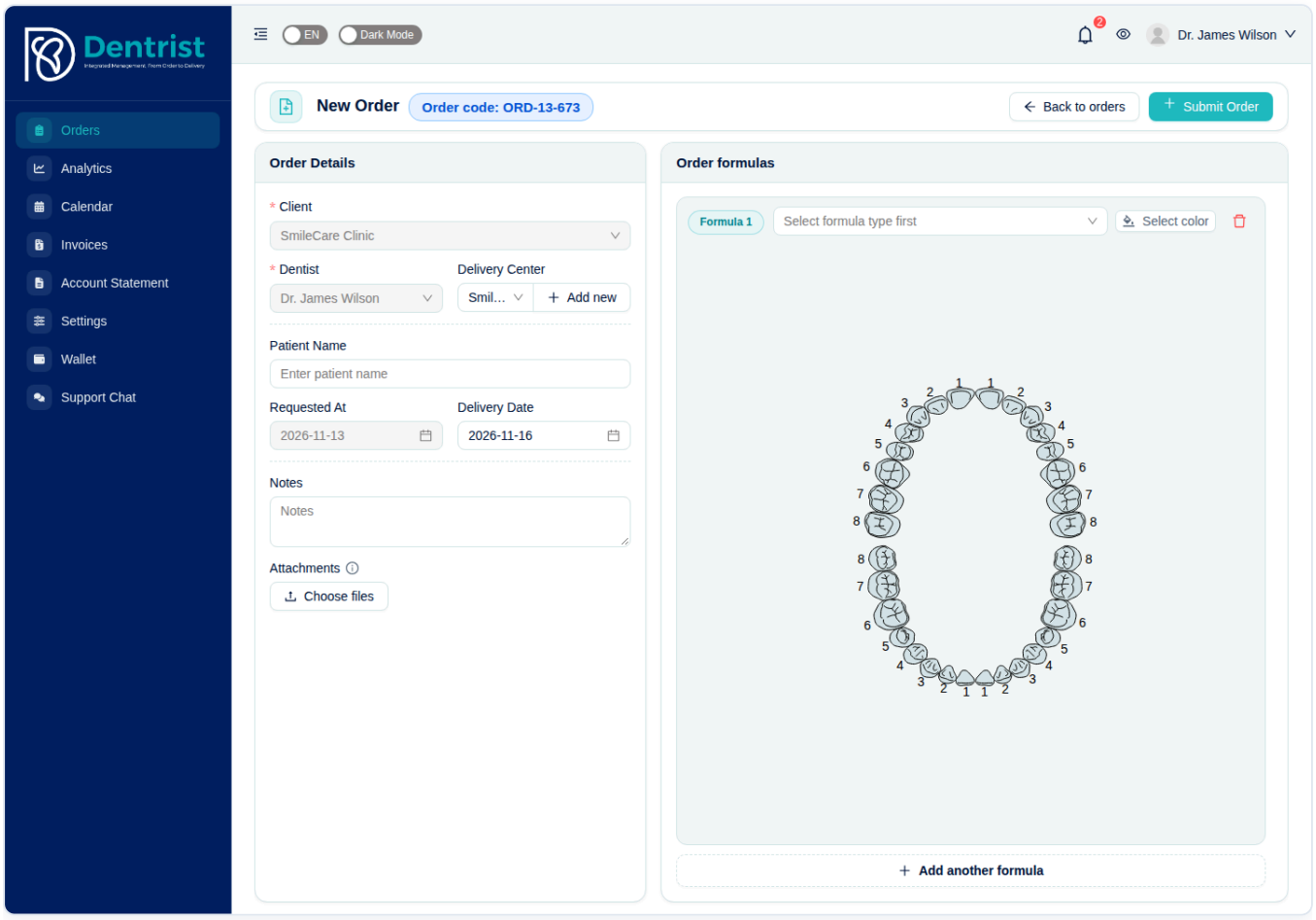
14.1 Orders

The dentist sees only their own (or their clinic's) orders, with the statuses the lab chooses to share.



The orders list in the dentist portal.

To send a new case, the dentist clicks **Create Order**. The dentist portal keeps a simpler form than the lab's: the **Client** and **Dentist** are already filled in and locked, there is no financial panel, and **Submit Order** sits at the top of the page. The dentist enters the patient name and delivery date, picks the delivery center, chooses the formula, shade and teeth on the tooth chart, attaches the scans or photos and clicks **Submit Order**. The order arrives at the lab as *Requested*, and the lab is notified.

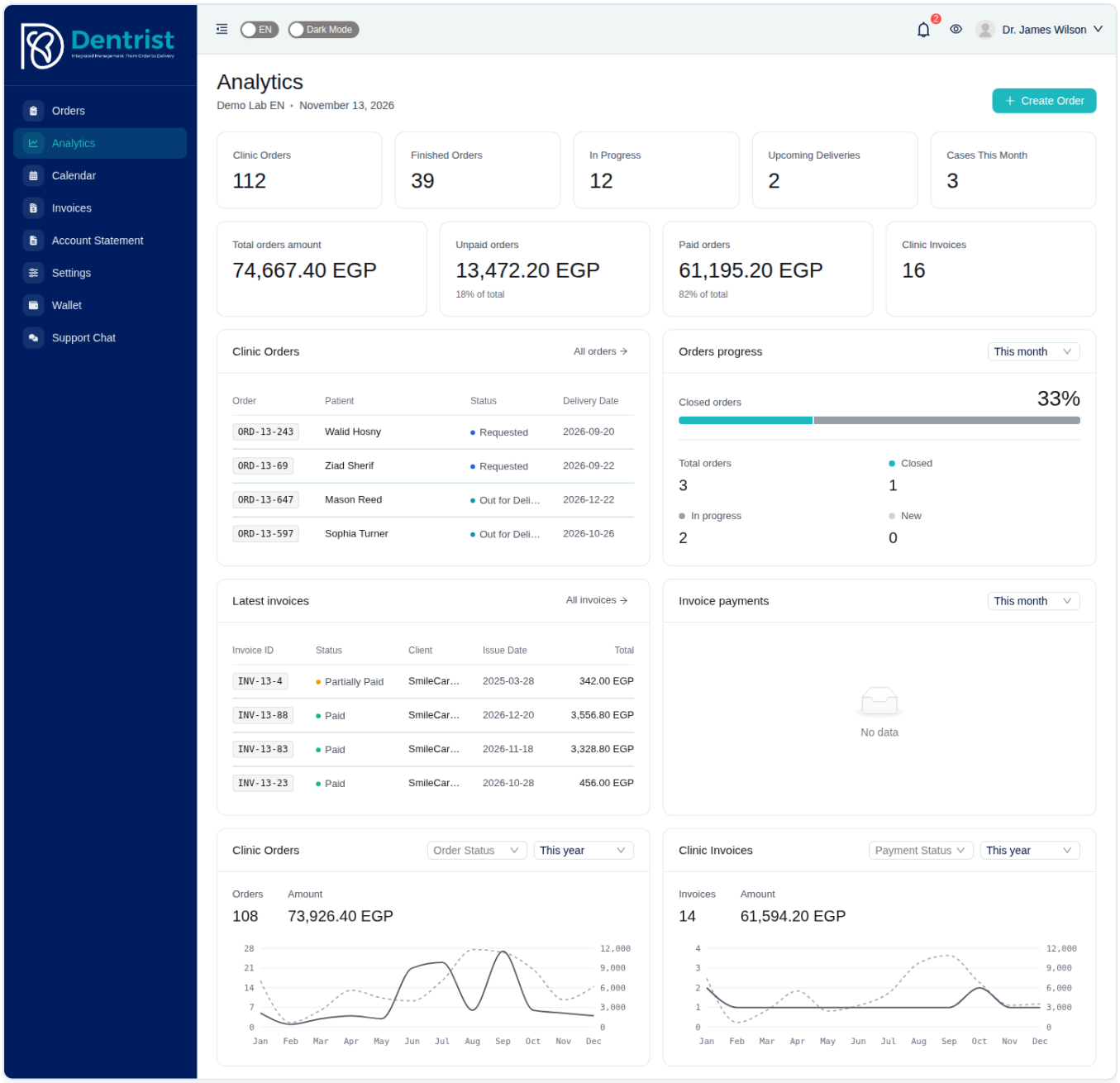


A dentist sending a new order to the lab.

On each order, the dentist can follow the status and, when the lab shares them, the production phases. They can talk with the lab in the **Client conversation** and download the lab's files.

14.2 Dashboard

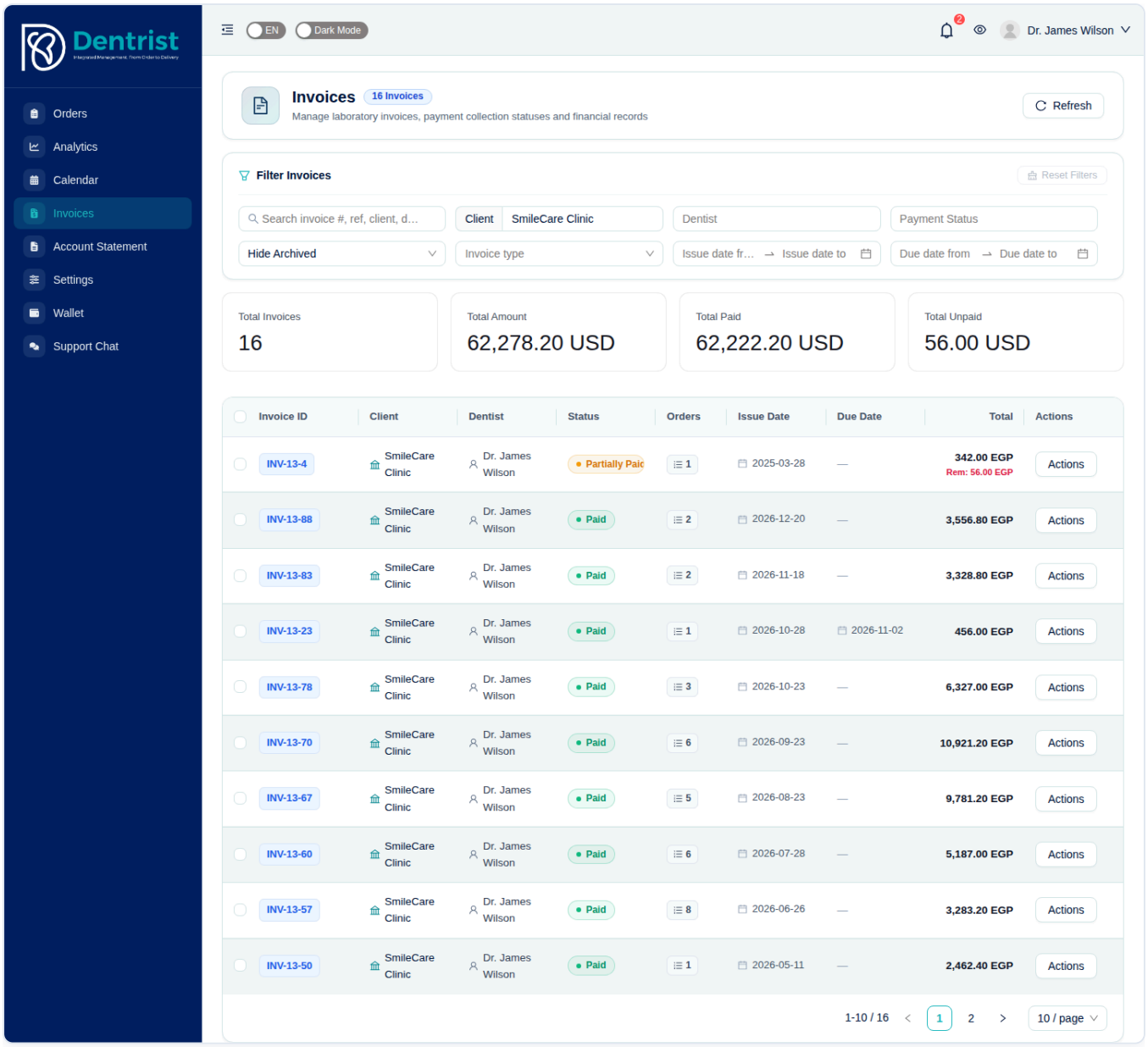
The dentist's **Analytics** page summarizes the clinic's orders (clinic orders, finished, in progress, upcoming deliveries and cases this month), the amounts ordered, paid and unpaid, the number of clinic invoices, the latest orders and invoices, the orders progress and the invoice payments. A **Create Order** shortcut sits at the top.



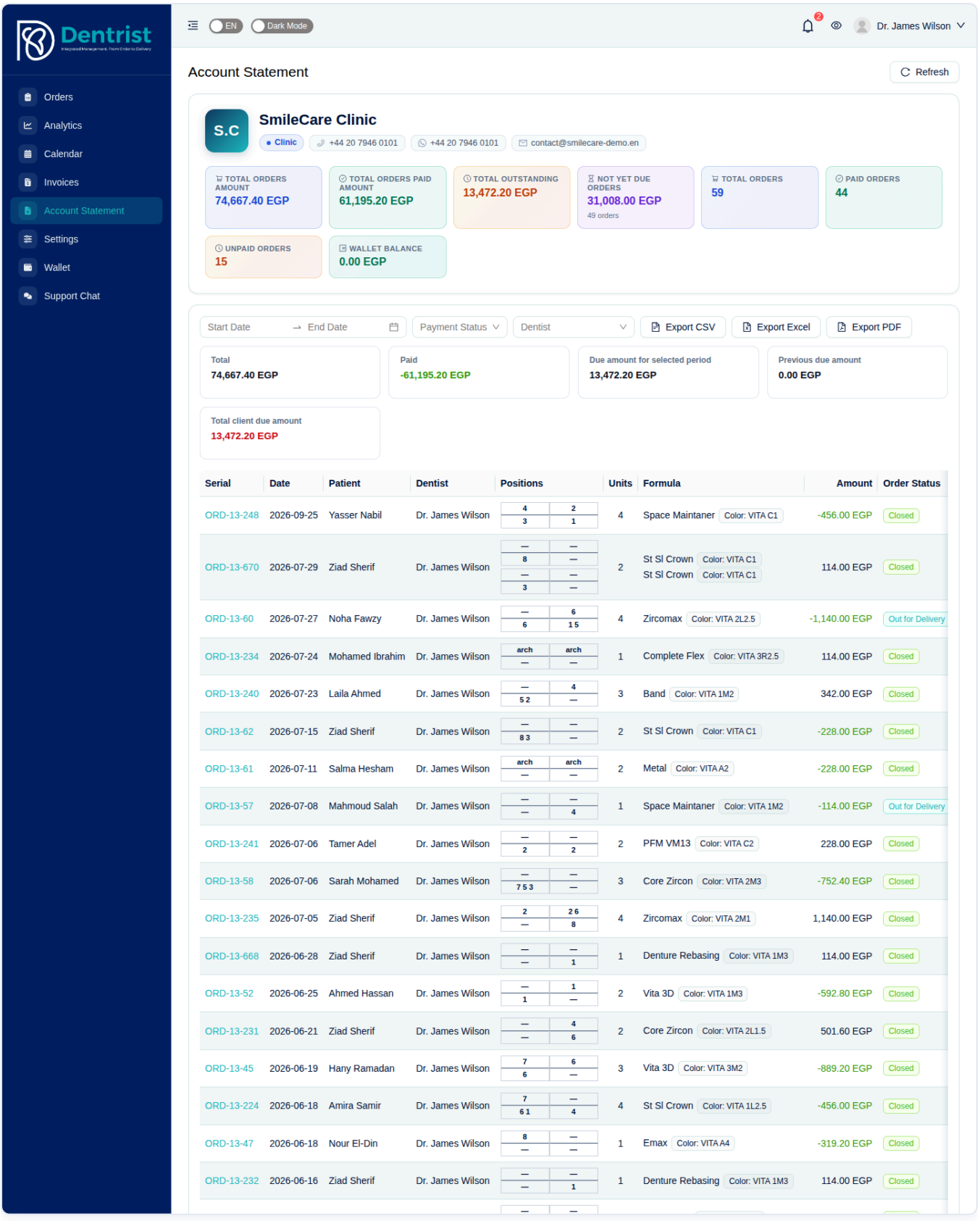
The dentist dashboard.

14.3 Invoices, statement and wallet

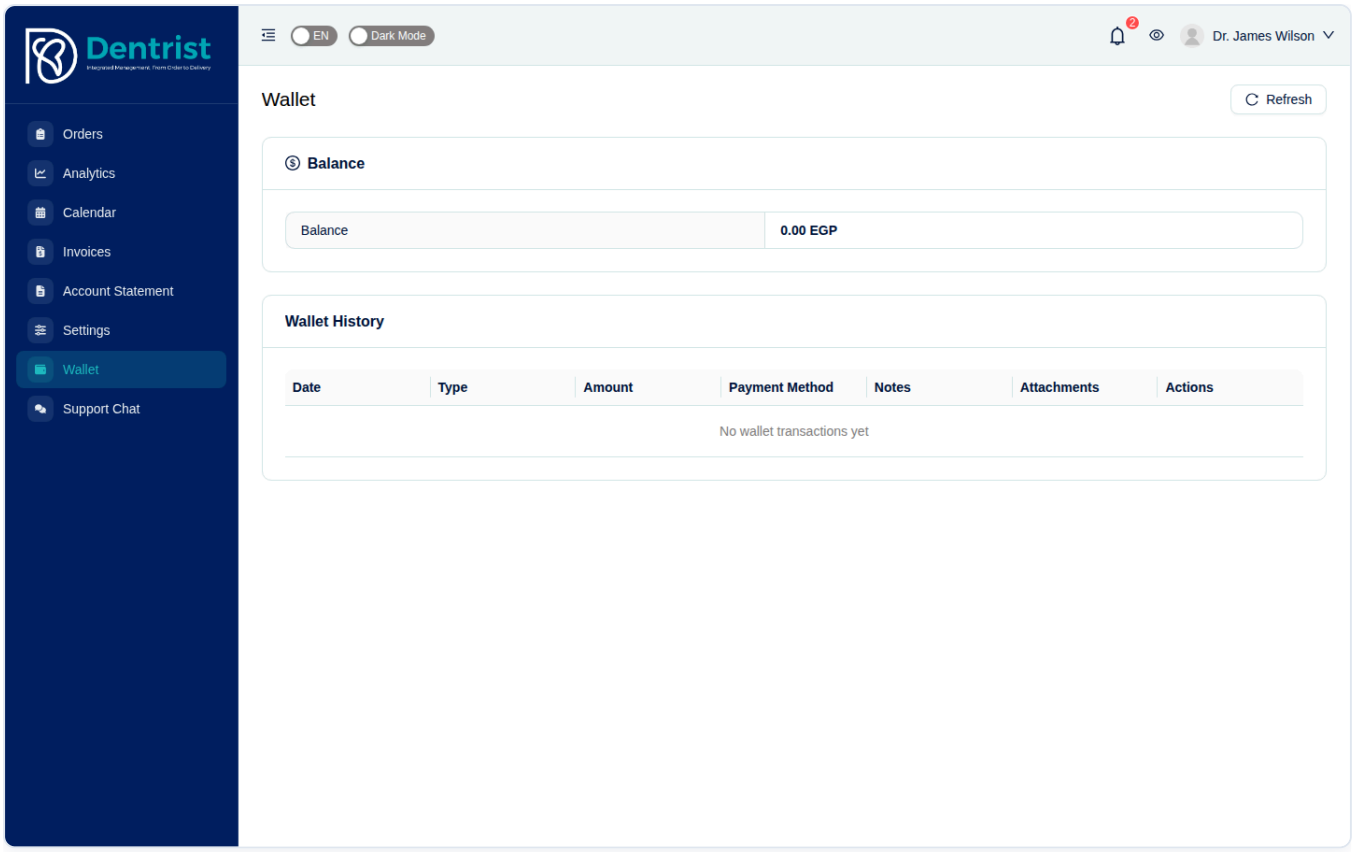
- **Invoices:** the invoices the lab issued to the clinic, with their status and remaining amounts. They can be viewed, printed and downloaded.
- **Account Statement:** the same statement the lab sees, with every billable order, what is paid and what is due.
- **Wallet:** the clinic's prepaid balance and its history.



Invoices in the dentist portal.



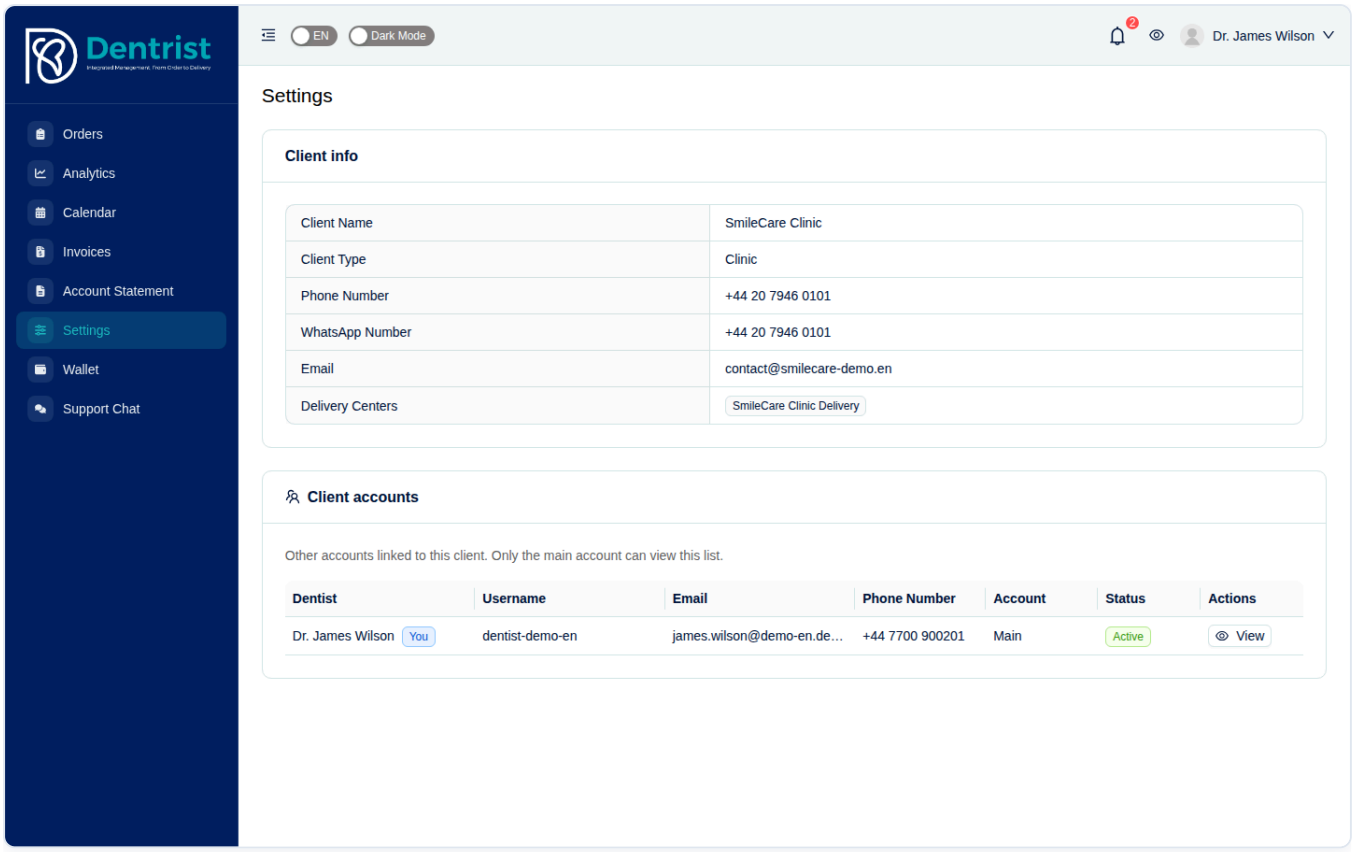
The clinic's account statement.



The clinic's wallet.

14.4 Settings and client accounts

Settings shows the clinic's details as the lab recorded them: name, type, phone, WhatsApp, email and delivery centers. Below them, **Client accounts** lists every dentist account linked to the clinic, with its username, email, phone, whether it is the main account and its status. Only the main account can see this list. The lab creates and edits these accounts from the client's **Dentists** tab.

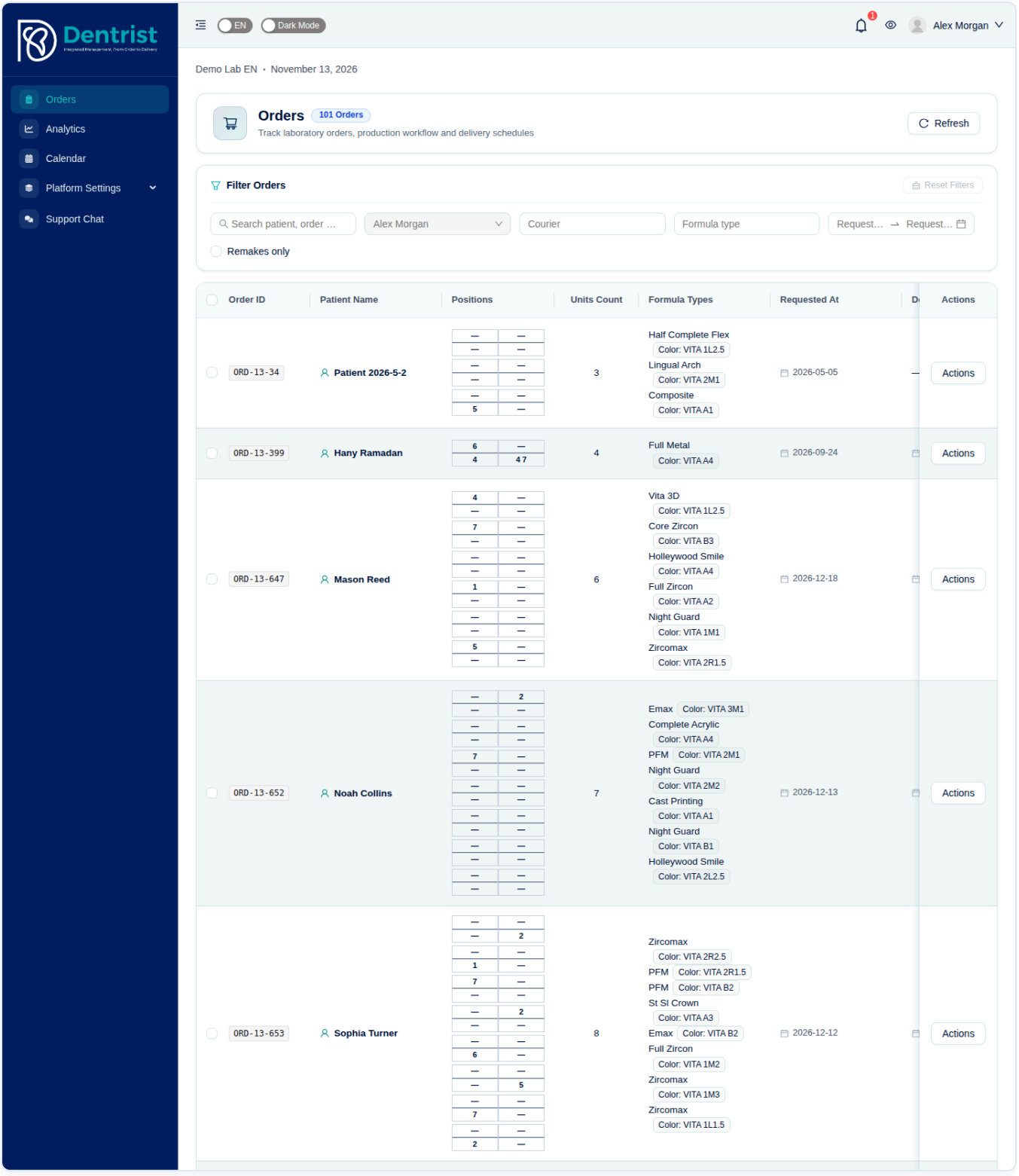


Clinic settings in the dentist portal.

> **Why it matters:** dentists stop calling to ask "where is my case?" because they can see it live, and the lab gets complete, readable orders with scans attached.

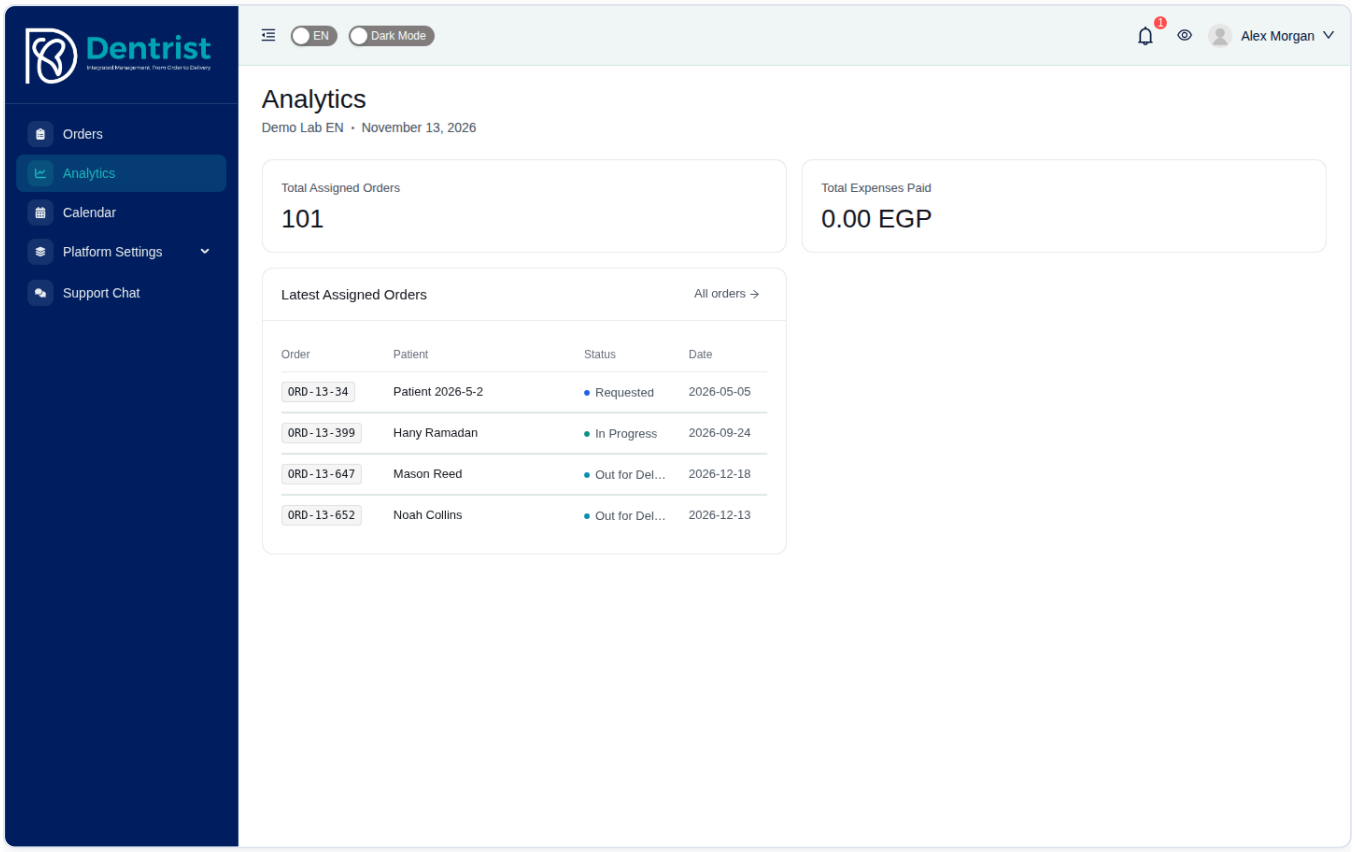
15. The technician view

Technicians see a reduced menu: **Orders**, **Analytics**, **Calendar**, a few **Platform Settings** and **Support Chat**. The orders list is already filtered to the technician and shows no prices. A **Remakes only** filter shows the cases sent back for rework.



The orders list of a technician.

From the order page, a technician can update the production **phases** they work on, upload files (for example the design), chat with the team, and move the order status when their role allows it.



The technician's dashboard: assigned orders, expenses paid to them and the latest assigned orders.

Appendix A. Quick reference

A.1 Common tasks

I want to…	Go to
Register a new case	Orders → Create Order
Take an order from a dentist who is not in the system yet	Orders → Create Order → New Dentist
Move a case to the next step	Order page → Jump to status
Assign a technician or courier	Order page → Workflow and Operations
Upload or view a scan	Order page → File Management → eye icon
Print the job ticket	Order page → Work Card
Send the dentist a link to the order	Order page → Copy link
Invoice a delivered case	Order page → Create invoice
Record a payment	Invoice → Mark as Paid / Partial Payment
Take a prepaid amount from a clinic	Clients → client → Wallet → Recharge
Send a clinic its statement	Clients → client → Account statement → Export
Give a clinic a special price	Clients → client → Custom prices
Record rent or a utility bill	Expenses and Suppliers → Expenses → Add Expense
Record a purchase on credit	Expenses and Suppliers → Supplier Bills → New bill
Pay technicians for the month	Expenses and Suppliers → Technician Settlements
Run payroll	Expenses and Suppliers → Salaries → New salary run
See who owes me money	Reports and Insights → Aging Reports
See my profit	Reports and Insights → Financial Reports → Profit and loss
Close last month	Accounting → Period Close
Add a staff member	Users → Add User
Change the VAT rate	Accounting → Tax → Settings
Add a lab holiday	Lab Settings → Vacations
Ask Dentrist for help	Support Chat

A.2 Order statuses

Each lab can have its own workflow. The default statuses are:

Status	Meaning
Requested	The order was received and is waiting to start. No production cost yet
In Progress	The case is on the bench. Production costs are recorded
Out for Delivery	The case left the lab. Usually the billable status: the amount is now owed
Delivered	The case reached the clinic
Closed	Delivered and paid
On Hold	Paused (for example waiting for the dentist). Keeps its billable state
Cancelled	Cancelled. Revenue and production costs are reversed

Labs may add their own statuses, such as *Under Review*, *Pending Design Approval*, *Design Approved*, *Design Revision Requested*, *Final Manufacturing in Progress* or *Disputed*.

A.3 Default chart of accounts

Code	Account	Code	Account
1000	Cash on hand	2300	Accrued production costs
1010	Bank	2400	Technician payable
1020	Money transfer channels	2500	Salaries payable
1100	Accounts receivable	3000	Equity / opening balances
1150	Withholding tax receivable	4000	Lab revenue
1160	Input tax recoverable	4100	Delivery revenue
1500	Inventory / materials	4900	Foreign exchange gain
1600	Fixed assets	5000	Materials / cost of sales
2000	Accounts payable	5100	Technician labor
2100	Client wallet / prepaid	5200	Additional operation cost
2200	VAT payable	5300	General operating expenses
2210	Other taxes payable	5400	Delivery cost
		5500	Salaries and wages
		5900	Foreign exchange loss

A.4 Glossary

Term	Meaning
Vendor	A lab using Dentrist
Client	A clinic, hospital or partner lab that orders from the lab
Formula type	A product or service the lab sells (crown, bridge unit, denture…)
Unit	One tooth (or one arch) of a formula on an order
FDI chart	The international tooth numbering chart used to select teeth
Phase	A production step of an order (Model, Design, Waxing…)
Billable status	The order status from which the client owes the order amount
Remake	A new order that redoes a previous one, linked to it with a reason
Wallet	A client's prepaid balance with the lab
Delivery center	An address of a client where cases are delivered
Settlement	A piece-rate pay statement for a technician
Journal entry	A balanced accounting record (debits equal credits)
Period close	Locking the books up to a date

A.5 Troubleshooting

Problem	What to do
An order cannot be invoiced	It has not reached the billable status yet, is on hold or cancelled, or is already on another invoice
An order cannot be edited	It reached the billable status. Move it back to an earlier status to edit it
An order is missing from revenue or the client statement	It has not reached the billable status. Check the yellow note on the order page
Totals on the dashboard and the reports differ	The dashboard is operational; the financial reports come from the ledger. Use the financial reports for the books
The ledger health check shows differences	Click **Resync ledger** on the Chart of Accounts page and run the checks again
A wallet recharge cannot be reverted	The wallet balance is lower than the recharge amount, or it was already reverted
A menu page is missing	Your role does not include it, or the feature is not enabled for your lab. Ask your admin or Dentrist support

Problem	What to do
Prices are not visible	Click the eye icon in the top bar