



INSTALLATION GUIDE

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Dentrix and Microsoft Word

Dentrix data can be used with Microsoft Word. To use Dentrix with Microsoft Word, you need to license and install Microsoft Word.



INSTALLATION GUIDE

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Introduction

Thousands of dental practices use Dentrix to run their dental practice. Dentrix boosts staff productivity, enhances professionalism, helps keep chairs full, increases collections, and improves the bottom line. And, with its extensive suite of eServices products and third-party partnerships, Dentrix provides many profitable integration solutions.

This Installation Guide will help you install and register your Dentrix G6 software.

Before Installing Dentrix

Before installing and using Dentrix, you should be familiar with using the computer. The Dentrix documentation is written with the assumption that you are familiar with using a PC and Microsoft Windows.

Microsoft Windows must be installed before you can install Dentrix. For information on supported Windows versions, read the Dentrix G6 System Requirements included in the box with your software and available online at www.Dentrix.com. For information about installing and using Windows, refer to the Windows documentation.

How To Get Help

Henry Schein recommends that dental offices contact Henry Schein TechCentral (1.877.483.0382) or another qualified integration specialist for new installation or upgrade assistance.

You can find answers to many questions about Dentrix in the Dentrix Help, which you can access from the Help menu of each Dentrix module. A secondary resource is the ***Dentrix G6 User's Guide*** (available on the Windows desktop after installing Dentrix and in the Dentrix Resource Center at www.Dentrix.com/resource-center). You can find additional information, including on-demand tutorials, at www.Dentrix.com/resource-center.

If you are on a current Dentrix Customer Service Plan, you can access the Dentrix technical support knowledgebase at www.Dentrix.com/resource-center for answers to common questions.

If these methods do not provide an answer, contact Dentrix Customer Support at 1.800.DENTRIX. Toll-free telephone support is available only to registered Dentrix

users on a current Dentrax Customer Service Plan. Registered users not on a current support plan will be charged for telephone support. (For current pricing information, visit www.Dentrax.com/support/contact-us.aspx)

Support is limited to the current version of the software and one prior release. When calling customer support, be near a computer running the Dentrax software. Be prepared to give the following information:

- Your name and the name of the practice
- The Dentrax customer number assigned to the practice
- The version number of the product being used
- The type of network being used, if any
- The version of Windows installed on the computer
- The exact wording of any messages that have appeared on the screen
- The circumstances surrounding the question or problem
- Steps that have been taken to reach a solution

Installing Dentrax G6 From a DVD

In an effort to provide you with current technology solutions, the Dentrax G6 installation program is on one DVD. Most modern computers have DVD readers installed. If your computers meet the Dentrax G6 system requirements, installing Dentrax G6 from DVD will not be a problem for your office. If you have any questions about installing from DVD or want to make sure your hardware is ready for Dentrax DVD installation, please contact your hardware technician or call Dentrax Customer Support at **1.800.DENTRIX**.

New Features

Some of the new features available in Dentrix G6 are briefly described in this section. For additional information about these features and other changes in Dentrix G6, refer to “What’s new in Dentrix G6?” in the Dentrix Help, and the Dentrix G6 Release Guide in the Documentation folder of the Dentrix G6 DVD and in the Dentrix Resource Center.

Alerts

- Medical alerts were enhanced so you can save medical alert notes in the notes history. You can copy medical alert notes to clinical notes, include medical alert notes in the Patient Notes Report, and add patient notes from Questionnaire forms to the medical alert note.
- In the **Create Patient Alert** dialog box, a new “Questionnaires” option was added to the list of options where a patient alert could be displayed in Dentrix.

Appointment Book

- When you create an appointment, you can now type a specific appointment length.
- You can now specify an additional Provider ID for an appointment. You can also display this additional Provider ID field in the appointment block, Hover window, the Print Appointment Book View Report, the Patient Route Slip, and the Patient Visit Form.
- The **Set Appointment Procedures Complete** dialog box in the Appointment Book now allows you to view and easily assign providers to procedures before posting them.
- Appointment blocks, the Hover window, the **Appointment Information** dialog box, and the **Appointment History** dialog box now include a **Date/Time Created** field and **Staff ID** field so you can see when the appointment was created and who created it.

Document Center

- The Document Center now provides a method to support documents scanned from all scanners as long as they use a supported Document Center format: .pdf, .doc, .docx, .xls, .ppt, .bmp, .gif, .jpg, .png, .txt, and .rtf. Other changes were made to make scanning documents easier.

Ledger

- Several enhancements were made to the Ledger including new columns (entry date, surfaces, check #), adjustable column widths that are automatically saved when you close the Ledger, the ability to sort by and hide columns, a note indicator for payments and adjustments that have a note, tooltips for the column headings, alternate row shading, and a Refresh button on the toolbar.
- When clicking **Enter Batch Payments** from the **File** menu, a new **Batch Payment Entry** dialog box appears with enhanced functionality.
- You can now split payments by multiple family members.
- In the **Ledger Colors Setup** dialog box, a new **Restore Defaults** button was added so you can restore the default Ledger colors.

Letters/List Manager

- You can use a new List Manager tool (similar to the one in Collections Manager and Treatment Manager) to create, view, and print customized lists of patient information. The List Manager also allows you to “hide” patients and merge letters for only the listed patients.
- The Letter Merge feature includes a new option that allows you to open a data file in Microsoft Excel.
- The **Patient Report View** dialog box associated with the Office Manager’s Letters feature was redesigned to list all the available data fields in a single tree view. A new **Select All** option was added so you can select all data fields at once. A new **Email** option in this dialog box allows you to specify whether you want to include patients **With Email addresses**, **Without Email addresses**, or **All**.
- A new data field was added where you can specify the date a patient last referred another patient.

- The process of generating letters and lists is now simpler and requires fewer mouse clicks. It is more flexible when using data files and creating journal entries.

Office Manager

- In the **Daily Huddle Report** dialog box, you can use a new drop-down menu to specify whether you want to print/batch the Patient Visit Form or the Patient Route Slip.
- The Source of Payment list box in the **Dental Insurance Plan** Information and **Medical Insurance Plan Information** dialog boxes includes several new options that you can select.

Miscellaneous

- Dentrix now includes a contact manager called eDex that lets you manage and quickly search for Dentrix contacts, such as patients, providers, staff, labs, insurance carriers, and other contacts. You can search by first or last name, address, email address, or phone number. You can also add custom notes or append notes to a patient note. A button to access eDex was added to the toolbars of most Dentrix modules; a button and graphic was also added to the Dentrix Launcher.
- The toolbar buttons for all modules were given a newer look.
- A new CMS 1500 Form was added to the Ledger. The instructions for completing the new claim form are available on the National Uniform Claim Committee (NUCC) website.

Tips for a Successful Installation

For a successful installation, read the following information before installing Dentrix. Call 1.800.DENTRIX or send an e-mail message to support@dentrix.com for any questions related to these installation tips.

- 1 Meet the System Requirements:** Make sure the server and workstations on your network meet the current system requirements before you upgrade to or install Dentrix G6. The current Dentrix G6 System Requirements are available online at www.Dentrix.com.
- 2 Back Up Your Data:** Create a backup of the server's hard drive. If you are upgrading, back up the server's Dentrix directory and all subdirectories. If any Dentrix data is stored elsewhere on the system, back up that directory as well. Verify the integrity of all backups to be sure you have a good backup before upgrading from a previous version of Dentrix. For more information, refer to the Dentrix G6 Recommendations document in the Dentrix Resource Center at www.Dentrix.com/support/resource-center.
- 3 Check Available Disk Space:** From the Start menu, click **Computer**. Right-click the C:\ drive icon and then click **Properties**. The **Local Disk Properties** dialog box appears, and the **General** tab displays the used and free disk space. Refer to the Dentrix G6 System Requirements for the required free hard disk space for servers and workstations. The Dentrix G6 System Requirements are included in the box with your Dentrix software and are available online at www.Dentrix.com.

Note: *If you use imaging software and/or the Document Center, you must dedicate an additional 30-40 GB of hard drive space in addition to what is needed for the G6 Server installation.*

- 4 Prepare for Server and Workstation Installation:** Find the Serial Number/Activation Code card inside the Dentrix G6 software box. These numbers will be needed during the installation (unless you are upgrading and have previously completed the activation). You can find these numbers in the box with your Dentrix software. If you are upgrading, check the Practice Assistant for reports. Print the reports and clear the Batch Processor. Send all unsent electronic claims. Depending on the size of your network, installing Dentrix G6 on your server and all of your workstations could be time-consuming. Please plan accordingly.

Note: Since the Dentrix G6 installation/upgrade process could clear any reports in the Batch Processor or Practice Assistant and delete any unsent electronic claims, we recommend that you print any reports you need before installing or upgrading.

- 5 For Upgrades, Verify the Correct Version is Currently Installed:** Dentrix G4 with Productivity Pack 8 or G5.2 must be installed before you can upgrade the program to Dentrix G6. To determine which version of Dentrix is installed, in the Office Manager, from the **Help** menu, click **About Office Manager**. If the version is not Dentrix G4 with Productivity Pack 8 or G5.2, all product upgrades must be installed to bring the version to one of these supported versions. For example, if Dentrix 11.0 is currently installed, you must upgrade to version G4 with Productivity Pack 8 before installing Dentrix G6.
- 6 Close Other Programs and Exit Dentrix at Each Workstation:** To avoid conflicts and allow access to all files and directories, you should disable any anti-virus and screensaver software and then re-enable it after you have completed the Dentrix installation. You should also close any other programs on the Dentrix server and all workstations. If you are upgrading, before installing Dentrix, close any Dentrix modules. During server installation, it is best to shut down each workstation (to prevent others from starting Dentrix while it is being updated).
- 7 Follow the Installation Instructions:** Make sure you follow all of the step-by-step instructions in the *Dentrix G6 Installation Guide* as you install Dentrix G6.
- 8 Finish the Installation Completely:** Do not interrupt the installation process, even if it appears as though nothing is happening. You will be prompted when the installation is ready to continue. Terminating an installation prior to completion could affect the integrity of the database. Terminate the installation only if you are directed to do so by Dentrix Customer Support.
- 9 Before installing Dentrix G6:** Be sure to check with the applicable application vendors to access these G6-compatible versions. To see a list of authorized vendors with applications designed to integrate with Dentrix G6, visit: www.Dentrix.com/products/henry-schein-partners.

Installing Dentrix G6

Read the Tips for a Successful Installation before beginning the installation. If Dentrix is being installed on a networked system, the installation process must be completed on each workstation. Install Dentrix on the file server (the computer where the practice database will be stored) first.

1. Insert the Dentrix G6 DVD into the DVD drive. If the DVD drive is equipped with AutoStart technology, the following screen will appear within a few seconds.



If the screen does not appear:

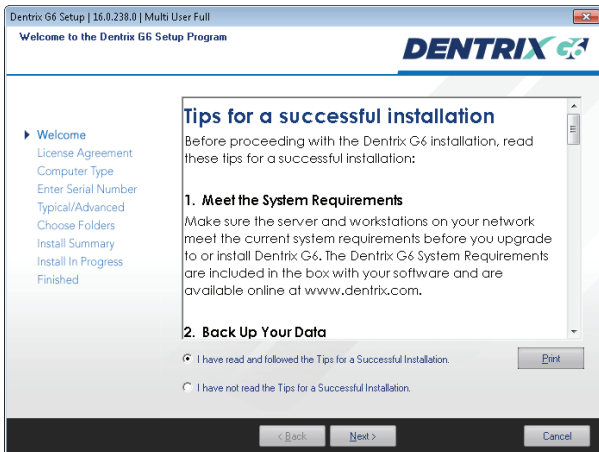
- A. Click the Windows Start button and then click **Run**.
- B. The **Run** dialog box appears.
- C. In the **Open** field, type D:\DENTRIX_G6 (where D: is the drive letter for the DVD drive).
- D. Click **OK** to begin the installation.

Dentrix performs a check of your system to verify that all required components (such as the required versions of Microsoft .NET Framework) are installed on your computer. After Dentrix has performed the check, Dentrix prompts you to install any required components that are not already installed.

Note: If the Microsoft .NET Framework 3.5.1 and 4.0 are not already installed on your computer, installing them will require several minutes. After they are installed, some computers may need to be rebooted.

Dentrix installs several prerequisites, such as the Edidev runtime and Crystal Reports prerequisites, which are needed for Dentrix G6. This will probably take several minutes.

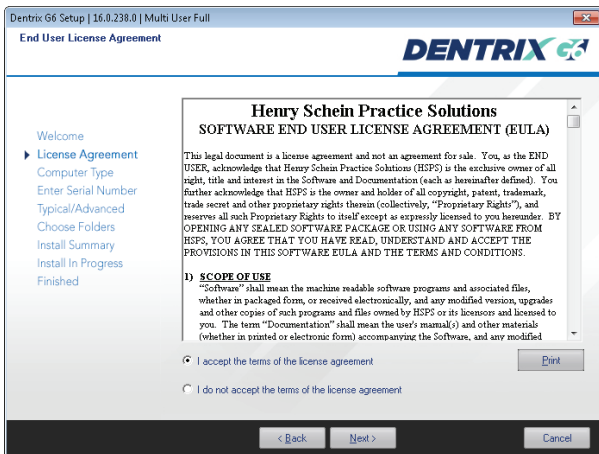
The Dentrix installation then displays the Welcome screen.



2. After you have read the Tips for a successful installation, select **I have read and followed the tips for a successful installation** and click **Next** to continue.

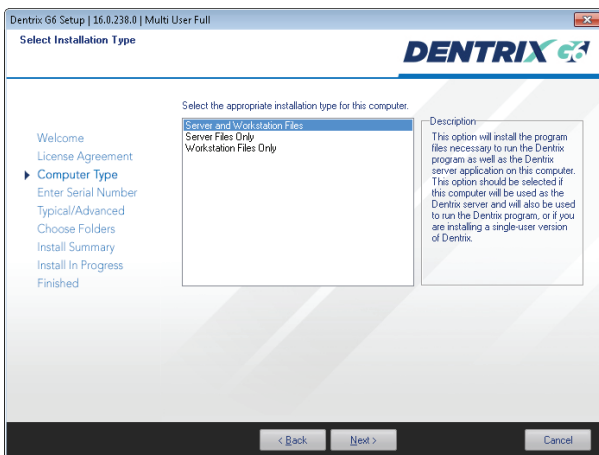
Note: If you are upgrading from a previous version of Dentrix, you will be prompted again to back up your data before proceeding. If you have backed up your data, click **Yes** to continue with the installation.

The End User License Agreement screen appears.



3. After you have read the Software End User License Agreement, select **I accept the terms of the license agreement** and click **Next** to continue.

The Select Installation Type screen appears.



4. Select the type of installation you are performing:

Note: *The Dentrix server must be upgraded or installed first before you can install Dentrix on any workstations.*

- **Server and Workstation Files** – Select this type if this computer will be used as the Dentrix server and a workstation, or if you are installing a single-user version of Dentrix.
- **Server Files Only** – Select this type of installation if you are installing on the computer that will act as the Dentrix database server for all other computers on the network.
- **Workstation Files Only** – Select this type of installation if you are installing Dentrix G6 on a front office or clinical workstation over a network and have already run the server installation on another computer on the network.

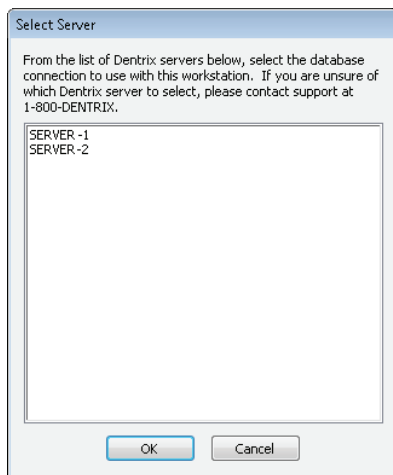
5. Click **Next**.

If you selected either Server option, and the Dentrix installation detects other Dentrix database servers on your network, you will be prompted to either configure this computer as a workstation (recommended) or continue and configure this computer as an additional server.

A message appears asking if you want to use an existing Dentrix database or install a blank (empty) database (for new users).

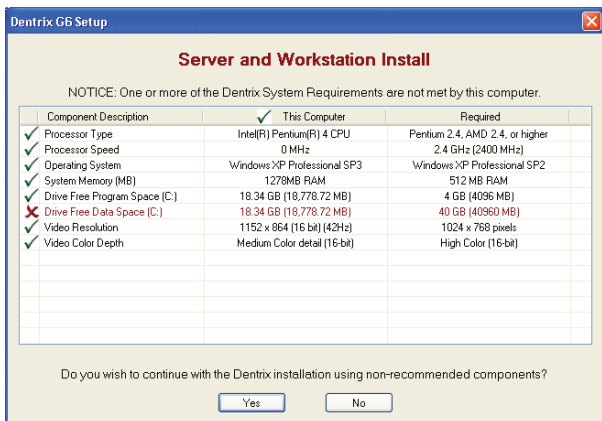
6. Click the option that is applicable to your office **Use an existing Dentrix database**, or **Create a blank (empty) database**.

If you selected the **Workstation Install Only** option, you are shown a list of available Dentrix servers and are prompted to select the server that you want to connect to.



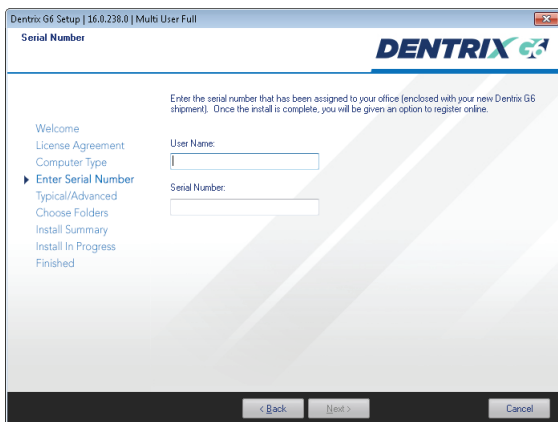
7. Select the server that you want to connect to and click **OK**.

Dentrix runs a system requirements check. If your system meets the requirements, the installation continues to the next step. If it does not meet the requirements, the **Dentrix System Requirements Notice** dialog box displays what your system needs in order to meet the system requirements.



8. If the **System Requirements Notice** dialog box appears, verify the system requirements. A green check mark indicates that a component meets the requirements. A red “X” indicates that a component does not meet the requirements. To discontinue the installation and install the required components (recommended), click **No** to stop the installation. Click **Yes** to continue the installation without the recommended system requirements.

The User Name and Serial Number screen appears.



9. Enter your **User Name** and **Serial Number**. Your serial number is on the Serial Number/Activation Code card inside the Dentrix G6 software box.

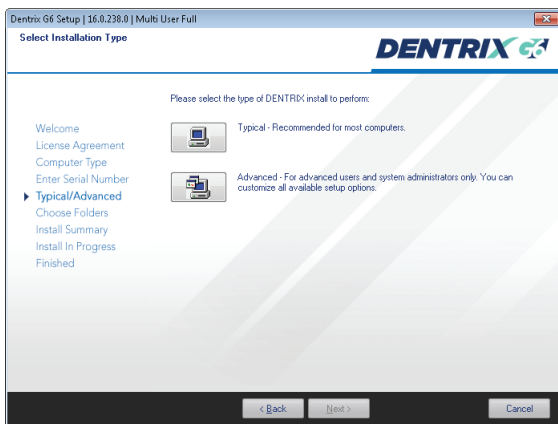
If you are upgrading, the serial number you previously used to install Dentrix will automatically appear in the **Serial Number** field. Verify that the serial number in the field is the serial number that was assigned to your office when you originally purchased Dentrix. In some instances, the serial number shown may not be the one assigned to your office.

To verify that your serial number is correct, consult the card that was included in the box with your Dentrix software. Enter the serial number that was assigned to your office to continue with the installation.

Important: You must enter the serial number that was assigned to your office in the **Serial Number** field in order for the registration/activation and Check for Updates features to work properly.

10. Click **Next**.

The Select Installation Type screen appears.

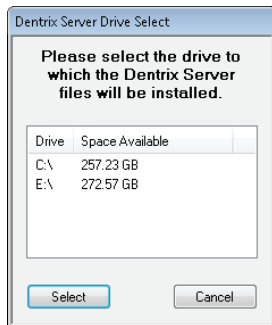


11. You can perform one of two installation types: **Typical** or **Advanced**. With a typical installation type (recommended for most computers), folders are placed in the default locations, and all of the default Dentrix G6 features are installed. With the advanced installation, you can specify the location of the Dentrix files.

If you select **Typical**, the Start Installation Screen appears. Proceed to Step 11.

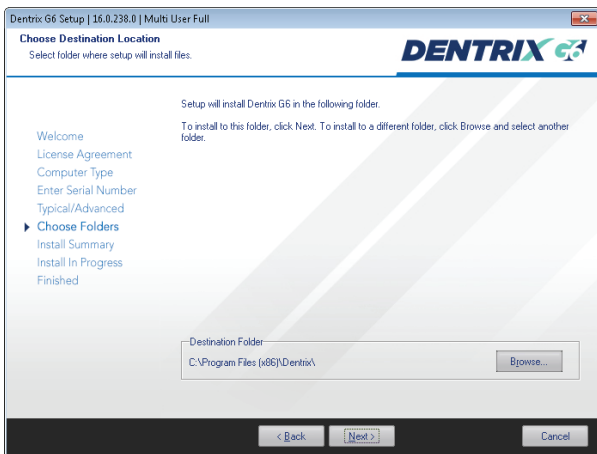
If you select **Advanced**, the **Dentrix Server Drive Select** dialog box appears.

Follow these substeps before proceeding to Step 12.



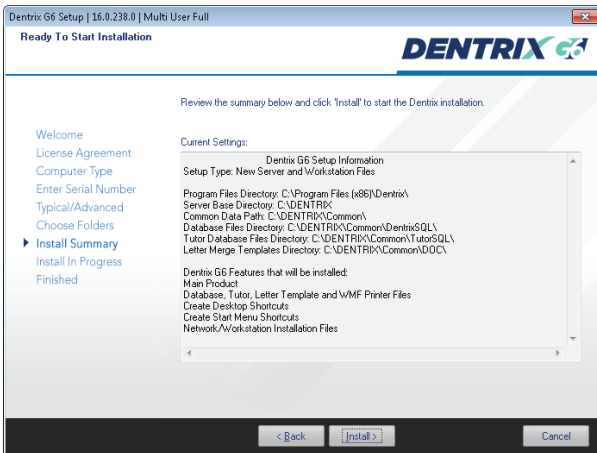
- A. Select the drive where you want to install the Dentrix server files and click **Select**.

The Choose Destination Location screen appears.



- B. To change the folder locations, click **Browse**, navigate to the desired location, and then click **Next**. To use the default folder locations, click **Next**.

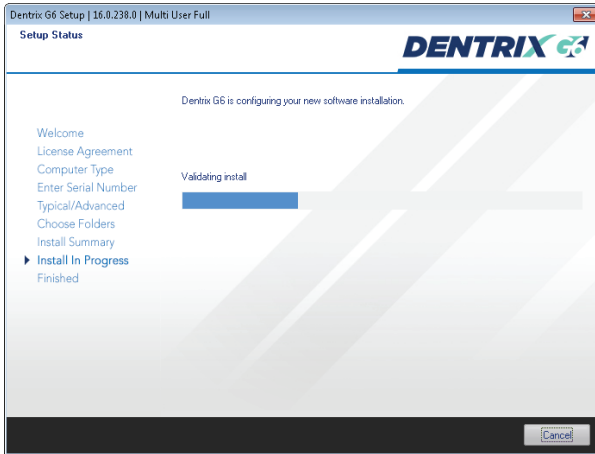
The Start Installation screen appears.



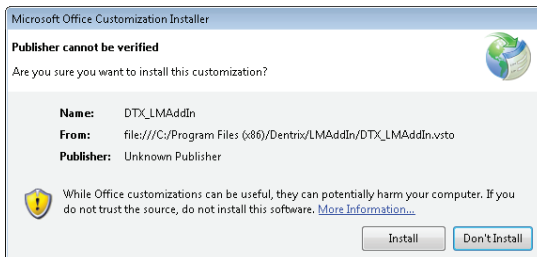
12. Review the settings that have been specified for your installation. To make changes to any of the settings, click **Back** and change them. When the settings are correct, click **Install** to begin installing Dentrix G6.

If you are upgrading to Dentrix G6 and converting your Dentrix database, a message appears, stating that the Dentrix G6 conversion can require considerable time depending on the size of your database. To proceed with the database conversion and Dentrix installation, click **Yes**.

As Dentrix is being installed on your computer, the Setup Status screen displays the current setup status.



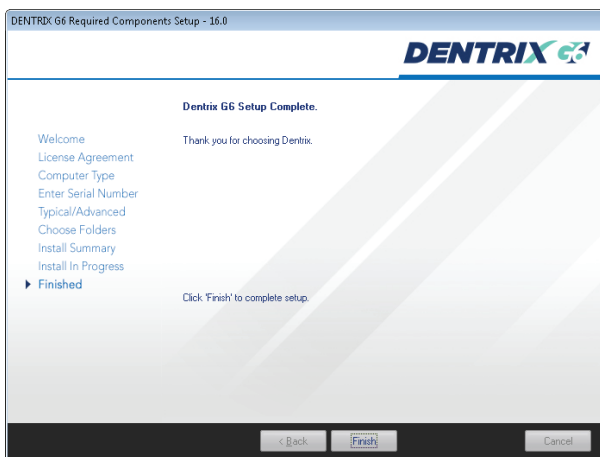
Note: If you see the Microsoft Office Customization Installer message at some point, click **Install** to continue the installation of this component.



If you have installed eSync on the computer, the Dentrix installation will prompt you to download the latest version of eSync and the eSync plug-ins, which includes Dentalink, an intra-office messaging tool.

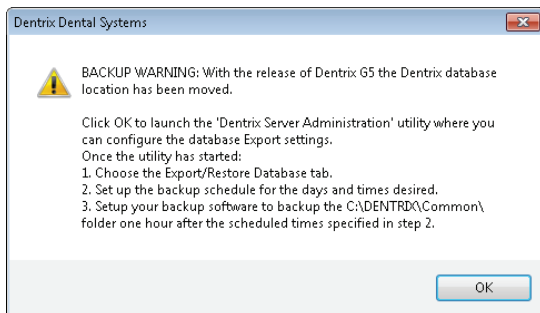
If you use eSync, and eSync is not installed on the computer, you will need to download and install the latest version of eSync.

After Dentrix is installed, the Setup Complete screen appears.



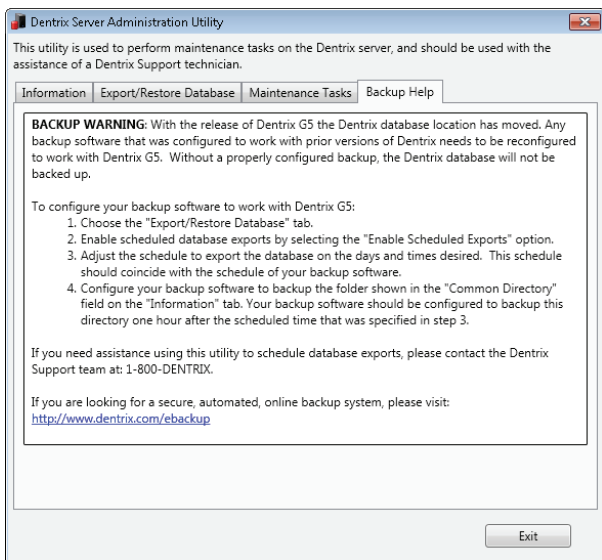
13. Click **Finish**.

A Backup Warning message may appear, letting you know that Dentrix G6 uses a new location for its database.



14. Click **OK**.

The **Dentrix Server Administration Utility** appears. Use this utility to schedule recurring exports of your Dentrix database to be backed up using your backup software (sold separately).



If you need assistance using the **Dentrix Server Administration Utility** to schedule database exports, please contact Dentrix Customer Support at **1.800.DENTRIX**.

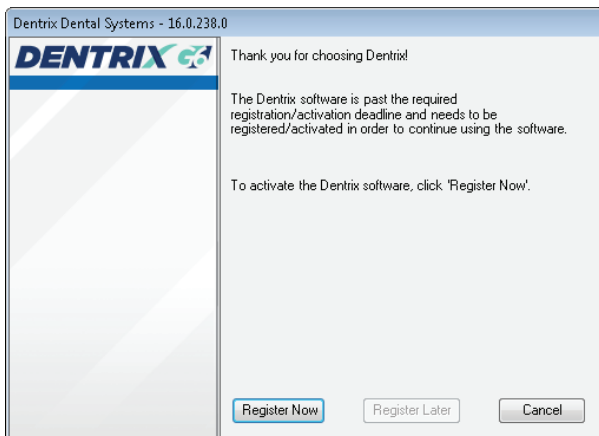
15. When finished, click **Exit**.

Note to integrators: For network installations, the C:\DENTRIX\Common folder on the server should be shared. (The Dentrix installation will attempt to automate this.)

The Dentrix installation will add these exceptions to the Windows firewall (any third-party firewalls should be configured so that these ports are open): TCP 6597, TCP 5712 TCP 6602, TCP 6603, TCP 6604, TCP 6605, TCP 6606, TCP 6610, and UDP 6600.

Registering/Activating Dentrrix G6

You must register and activate Dentrrix G6 in order to run your software and receive update information. We recommend that you register and activate Dentrrix at the time of installation. If you do not register at the time of installation, the activation dialog box appears when you open any Dentrrix module. You have 30 days in which to register before registration/activation is required to use your software.



You can register/activate your software by clicking **Register Now**. You can temporarily skip the registration/activation process by clicking **Register Later**.

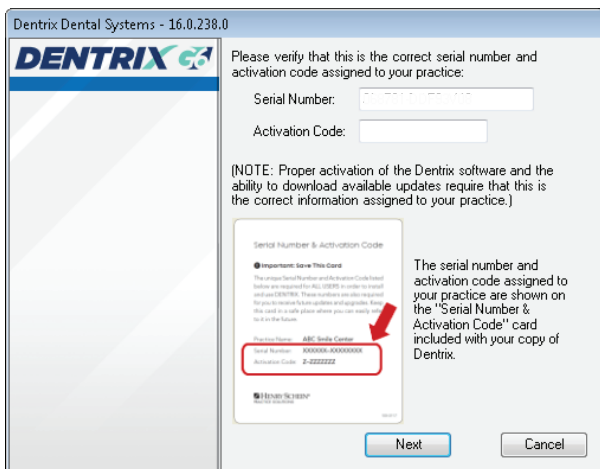
Register Now

You only need to register your software once, regardless of how many workstations you have.

To register your software

1. From any workstation, click **Register Now** on the registration/activation dialog box.

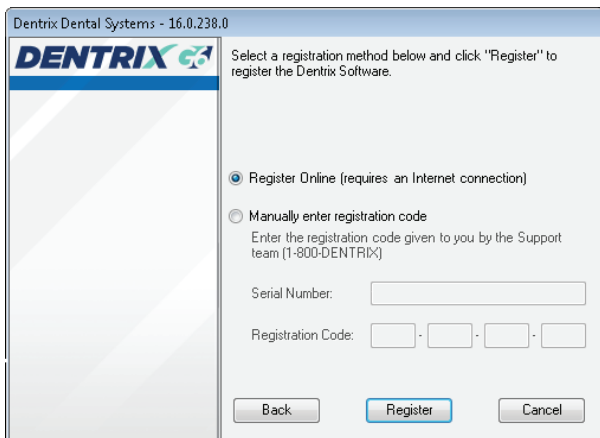
The serial number and activation code verification dialog box appears.



2. The serial number you entered when you installed Dentrix G6 appears in the **Serial Number** field. Verify that the serial number matches the serial number assigned to your office. You can find your serial number on the Serial Number & Activation Code card inside the Dentrix software box you received when you purchased Dentrix.
3. In the **Activation Code** field, enter the activation code assigned to your practice. You can find your activation code on the Serial Number & Activation Code card inside the Dentrix software box you received when you purchased Dentrix.

Important: You must enter the correct serial number and activation code assigned to your practice. If you do not enter the correct serial number and activation code, you will not be able to activate the software properly or download the correct updates for your software.

4. Once you have entered the correct serial number and activation code, click **Next**.



5. Select the desired option: **Register Online**, or **Manually enter registration code**.

Note: *Registering online requires a valid Internet connection. If you do not have an Internet connection, you must manually enter the registration code.*

These options are explained below.

Registering Online

To register your Dentrix software online

1. Click **Register**.

The registration tool checks your serial number and automatically registers and activates your software. A message appears when the activation has been completed successfully.

2. Click **OK**.

Manually Entering Registration Code

To register your Dentrix software manually

1. Call Dentrix Customer Support at **1.800.DENTRIX** to obtain your complete registration code. When you call, you must have your full serial number available,

which is located on the Serial Number & Activation Code card inside the Dentrrix G6 software box.

2. Dentrrix Customer Support will provide you with a 16-digit registration code. Enter your registration code (obtained by calling Dentrrix Customer Support) in the fields provided (four digits in each field).

Important: *The activation code found on your Serial Number and Activation Code Card is for online registrations only, and is not the registration code you should enter here.*

3. Click **Register**.

A message appears when the activation has been completed successfully.

4. Click **OK**.

Register Later

If you click **Register Later** on the registration/activation dialog box, the reminder will continue to appear once a day when you open Dentrrix until the end of your 30-day grace period. After 30 days, the **Register Later** button is disabled on the registration/activation dialog box, and you must register Dentrrix G6 before you can use it. Follow the steps in the Register Now section above to register/activate your software so you can use it.

Update Manager

Note: *You can use the Smart Upgrades feature to deploy Dentrrix G6 to a computer on your network without accessing the setup files on the server or taking the DVD to the other computers. Once you have upgraded one computer to G6, you can use the Update Manager to update the remainder of your computers. This is the preferred method of upgrading.*

As with all versions of Dentrrix, once you have installed updates on any computer on your network, Dentrrix requires you to install the updates on all other computers on your network.

With Dentrrix G6, this process is automated if you have already upgraded to Dentrrix G6

on your server. When you attempt to open a Dentrix module on a computer that has not yet installed the required updates, a message box appears, notifying you that the computer needs to install updates.

You must install the required updates to use Dentrix on that computer. If there are optional updates to install, you can choose to install those updates, but it is not required to run Dentrix.

To install the updates, click **Install**. All open Dentrix programs close, and an install status message box appears. The updates install, and you can then access Dentrix on that computer.

Note: *If you stop the installation before it is finished, you will be prompted to install the updates again when you try to access Dentrix.*

Installing Dentrix G6 Over a Network

After you have upgraded to Dentrix G6 on your server, you can follow these instructions and install Dentrix G6 from the setup files on the server. This installation method does not require the DVD.

To install Dentrix G6 over a network

1. Click the Windows Start button and click **Run**.
2. Enter `\\[server]\Common\Installs\g6\Setup.exe` on the command line, where “Server” represents the name of your Dentrix server computer on the network. The Installation Setup screen appears for several seconds, followed by the Welcome screen.
3. Click **Install Software**. The screen that appears lists the products you can install. From this screen, you can install Dentrix G6 and the Required Components.
4. Click **Install Dentrix G6**. The InstallShield Wizard begins installing Dentrix.

Note: *If your system does not meet the system requirements, the Dentrix System Requirements Notice dialog box displays what your system needs in order to meet the system requirements.*

After the Dentrix software has been installed, the Setup Complete screen appears.

5. Select whether you want to restart your computer now or later and click **Finish**.

DENTRIX G6



www.Dentrix.com | Support: 1.800.DENTRIX
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