DentureFlowPro 5.0 — Feature Guide

Updated July 30, 2026

A reference for every feature in the app, organized by area. Use this alongside the Getting Started guide — that one gets you oriented; this one is for looking up "how do I do X?"

What's new in this update (July 2026)

• **Edit instead of redo:** charges and appointments can now be corrected in place — no more delete-and-recreate.

• **Front desk:** patient search now matches phone numbers and email; new sort options; "Last seen" on every patient row; warning flags on patients.

• **Billing:** overpayments now show as "Credit on Account"; receipts get sequential numbers; write-offs are reversible.

• **Fee guides:** edit items in place, and copy a reference guide into your clinic to customize.

• **Multi-office labs:** a combined All Offices view of every lab queue you belong to.

• **Schedule:** color accents by appointment type, a live current-time line, and a phone-friendly agenda view.

• **A visual refresh** across the app — larger navigation, logos, and page headers. Everything is where it was.

Patients

Creating a new patient Click + New Patient (top of the Dashboard or Patients page). Fill in what you know — you can leave most fields blank and complete them later from the patient's chart.

Finding a patient Use the search bar at the top of any page — type a first or last name and matching patients appear as you type. On the Patients page, the filter also matches **phone numbers** (type the digits exactly as you see them on call display — formatting doesn't matter) and **email addresses**.

Sorting the patient list Sort by last seen, name A–Z, treatment date, newest patients, or balance owing. Each row shows the patient's **last visit date** and a badge for their next upcoming appointment, and you can filter to just the patients **scheduled today**.

Warning flags Flag a patient with **Non-payment risk**, **Arrives late**, **No-show history**, or a custom note of your own (set these in the patient form). Flags appear on the patient list and the chart header so the whole team sees them before booking or billing.

The patient chart Opening a patient gives you tabs for notes, health history, images, documents, treatment steps, billing, insurance, and referrals — everything about that patient lives in one place.

Archiving a patient You can only archive a patient once their account is either paid in full or formally written off — this is enforced automatically so a patient with an outstanding balance can't accidentally disappear from view.

Clinical Notes & AI Documentation

Writing a note Type or dictate into the note box, then click the AI formatting button to have it cleaned up into proper clinical language. Always read the result before saving — see the AI note in the Getting Started guide.

Note locking If you're the clinic's denturist, your notes lock immediately — they're final. If you're any other role, your note is saved as “Pending” until the denturist reviews and locks it. You can edit your own pending note for 24 hours after creating it.

Importing an old chart If a patient is coming from a previous system, upload their old chart as a PDF (from the patient's chart) and the AI will pull out demographics (name, DOB, contact info) and write a clinical summary note — review both before keeping them.

Oral examination from photos Upload one or more intraoral photos and the AI writes a full soft-tissue/hard-tissue examination note, with one section always left as an editable placeholder for buccal mucosa/tongue findings.

Radiograph / image interpretation Upload an x-ray or scan and specify the image type — the AI writes a structured clinical interpretation (bone quality, pathology, prosthetic considerations, etc.). It always uses FDI tooth numbering.

Treatment steps & journey sync The Treatment Steps section on a patient's chart tracks what's been done and what's upcoming. Click **Sync from Notes** to have the AI scan the patient's clinical notes and automatically detect completed/upcoming steps — it won't guess; it only marks something completed if the note clearly says so.

Referrals & Reports

Referral letters From a patient's chart, dictate what you want to communicate to a referring dentist and the AI drafts a full professional letter — signed with your clinic's denturist name (set this in your clinic profile).

Consult reports Similarly, dictate consult notes and the AI drafts a complete consultation report for a referring provider.

Outgoing referrals tracker Log when you refer a patient elsewhere (extractions, restorative work, etc.), track status (pending / attended / no-show), and set follow-up dates.

Referral sources & leaderboard Track where your patients come from (a specific dentist, a current patient, advertising, etc.). The Dashboard shows a leaderboard of your top referral sources and a monthly trend chart — filter by this month, last 3 months, or all time.

Scheduling

Booking an appointment From the Schedule page, click an open time slot and fill in the patient, appointment type, and any notes for the visit.

Editing an appointment Open any appointment from the schedule and click **Edit** to change its date, time, type, duration, or notes — no need to cancel and rebook.

Reading the schedule Appointment cards are color-accented by type (consults, records, bite, try-in, delivery, repairs, maintenance), and today's grid shows a line at the current time so you can see where the day is at a glance.

Appointment statuses Appointments can be marked scheduled, arrived, waiting, in progress, completed, cancelled, late, missed, same-day cancellation, or cancelled by office. Cancelling by office requires a reason.

Importing a schedule from a file If you have a schedule exported from another system (PDF, Excel, or plain text), upload it and the AI will match names to existing patients (or flag new ones to auto-create) and build the day's appointments for you. Review the results — anything it couldn't confidently match is flagged as failed rather than guessed.

Schedule blocks Block off time for things like vacations or conferences (only the denturist or front-desk staff can delete a block).

On your phone Phone-width screens get a tappable agenda list instead of the desktop time grid, with the navigation behind a slide-out menu. The app is still designed for desktop — but checking the day from your phone works.

Lab Workflow & Partial Denture Designer

Lab tasks Create and track lab work — assign to a staff member, set priority and due dates, and track status through pending → in progress → completed.

Working across offices If you belong to more than one office, the Lab Workflow page has a **This Office / All Offices** toggle. All Offices shows one combined queue across every location you're part of, with a clinic badge on each task — built for central lab technicians.

Lab prescriptions Fill out a full lab prescription (arch type, denture type, shade, instructions) tied to a patient or lab task.

AI design suggestions Upload an impression or scan photo from within a lab task to get two AI-suggested framework design options.

Partial Denture Designer (standalone page) A dedicated tool: upload occlusal photos (upper/lower, plus optional buccal and anterior views) and get three complete “by the book” framework design options — clasp types, major connector, rest seats, retentive elements, and clinical rationale for each. Save your chosen design straight into a lab prescription and generate a print-ready PDF to send with the case.

Billing & Fee Guides

Charges & payments Add charges to a patient from your clinic's fee guide (pulls in the correct professional/lab fees automatically), and log payments as they come in.

Correcting a charge Made a mistake? Click the edit button on any charge to fix its description, date, quantity, or fees in place. Totals and the patient's balance recalculate automatically.

Deposits & credits Overpayments are fine — a patient who pre-pays simply carries a **Credit on Account**, shown on their billing tab, receipts, and statements until it's used up.

Receipts & statements Print a payment receipt or a full account statement for a patient — both show your clinic's own name, address, and denturist, and are safe to hand to the patient. Every payment gets a sequential receipt number (e.g. R-000123) printed on the receipt.

Write-offs Writing off a balance (denturist only) books a balancing ledger entry so the account and the ledger always agree — and it's reversible: un-writing-off restores the debt exactly. Write-offs are reported on their own line, never counted as collections.

Fee guides Every clinic has its own private fee guide(s). Denturists can import one from a PDF (see the Getting Started guide), copy a built-in reference guide into the clinic to customize, or expand any guide into a searchable item editor to fix amounts and add missing items in place.

CDCP copay tracking Record the CDCP copay conversation and its outcome — paying (with the amount) or waived — shown on the patient's profile badge and copay card. The Dashboard surfaces anyone still needing that conversation.

Predetermination tracking Track predetermination status (pending/sent/approved/not approved) with the sent date. Anything sent more than 10 days ago without a response is automatically flagged as overdue on the Dashboard.

Recall List

Shows patients who haven't been seen in a while, sorted by how long it's been (default: 12 months, adjustable). Filter by referral source, and mark a patient as contacted once you've reached out.

Staff Tasks

Your personal to-do list within the app — tasks assigned to you across all your patients, filterable by status, category, and whether they're yours specifically or unassigned. Also shows lab-specific tasks in one combined view under Lab Workflow.

Staff Management (denturist only)

Adding staff Go to Staff in the sidebar and click Add Staff — fill in their name, a username, their role, and a temporary password (or generate one). You'll get a one-time screen with their login details; copy it and send it securely (see the Getting Started guide for the full walkthrough).

Removing staff Click the trash-can icon next to a staff member's name to remove someone who's left — this only revokes their access to your clinic; it doesn't affect anything else.

Questions or Problems?

Reach out to your clinic's denturist, or to Damien directly. For tech support, call or text **(437) 383-6637** anytime — day or night, whatever's easiest. Screenshots of anything odd are always appreciated and make it much faster to track down.