

QuickNotes

Creating QuickNotes can save you time with notes that you type in repeatedly. QuickNotes is a feature that allows you to use pre-defined note text (user-defined by you) that may be edited within each note field as you go.

For example, you might repeatedly type the following on your insurance forms: "This is our second request for payment. Claim originally submitted on DD/MM/YY. Thank you in advance for your cooperation with payment on this claim."

How to Set Up a QuickNote

- From the *Main Menu*, click **System Stuff** and then click **QuickNote Setup**.
 - The QuickNote Setup option is in the **Note display and editing section**.
- Click and type a name that will refer to the note.
 - This note may contain merge fields.
- Type the note in the note box.
 - This note may contain merge fields.
- Click when done.

Using a QuickNote

- When you are in the note field on an insurance form (or any other note field), click .
 - If the current note is empty, the *QuickNote name* search window will appear.
 - If the current note is not empty, the *Search for...* window will open. Click for the *QuickNote name* search window to open.
- Type the name of the QuickNote that you want to enter in the current note field.
 - If you can't remember the QuickNote name, the **page up** or **page down** keys will scroll through the available QuickNotes.
- The note will appear in the note box, and it may be edited if customization is necessary.
 - Editing the note once it's in a note box won't change the original QuickNote.

Questions? Contact the staff at Datacon for help.
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