

DENTRIX

Dentrix 2023

INSTALLATION GUIDE

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Introduction

Thousands of dental practices use Dentrix by Henry Schein One 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 23.12 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 2023 System Requirements available online at www.dentrix.com. For information about installing and using Windows, refer to the Windows documentation.

How To Get Help

Henry Schein One recommends that dental offices contact TechCentral by Henry Schein One (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. You can also 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 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 Dentrix Customer Service Plan. Registered users not on a current support plan will be charged for telephone support. (For current pricing information, visit www.dentrix.com/support/contact.)

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

- Your name and the name of the practice
- The Dentrix 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 Dentrix 23.12

Important: You must be running Dentrix G7 or later to upgrade to Dentrix 23.12.

In an effort to provide you with current technology solutions, the Dentrix 23.12 installation program is available over the internet. If your computers meet the Dentrix 2023 system requirements, installing Dentrix 23.12 from the internet will not be a problem for your office. If you have any questions about

installing or want to make sure your hardware is ready for Dentrix installation, please contact your hardware technician or call Dentrix Customer Support at 1-800-DENTRIX.

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.

- **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 23.12. The current Dentrix 23.12 System Requirements are available online at www.dentrix.com.
- **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 too. Verify the integrity of all backups to ensure you have a good backup before upgrading from a previous version of Dentrix.
- **Check Available Disk Space:** From the Start menu, click **My 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 2023 System Requirements for the required free hard disk space for servers and workstations. The current system requirements 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 23.12 Server installation.

- **Prepare for Server and Workstation Installation:** Find the Serial Number/Activation Code. You will need these numbers during the installation. You can find these numbers in your welcome email message. If you are upgrading, check the Batch Processor and the Practice Assistant for reports. Print the reports to clear the Batch Processor. Print the generated reports in the Practice Assistant. Send all un-sent electronic claims.

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

- **For Upgrades, Verify the Correct Version is Currently Installed:** You must install Dentrix G7 or later before you can upgrade the program to Dentrix 23.12. To determine which version of Dentrix is installed, from the **Help** menu in the Office Manager, click **About Office Manager**. If the version is not Dentrix G7 or later, you must install all product upgrades to bring the version to G7 or later.
- **Exit Dentrix at Each Workstation and Close All Other Programs:** Close any Dentrix modules and any other programs on the Dentrix server and all workstations. To avoid conflicts and allow access to all files and directories, disable any anti-virus and screensaver software and then re-enable it after you have completed the Dentrix installation. Shut down each workstation (to prevent others from starting Dentrix while it updates).
- **Follow the Installation Instructions:** Make sure you follow all of the step-by-step instructions in the *Dentrix Installation Guide* as you install Dentrix 23.12.
- **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.
- **Before installing Dentrix 23.12:** Check with the applicable application vendors to access these G7.4.5-compatible versions. To see a list of authorized vendors with applications designed to integrate with Dentrix 23.12, visit: www.dentrix.com/products/henry-schein-partners.

Installing Dentrix 23.12

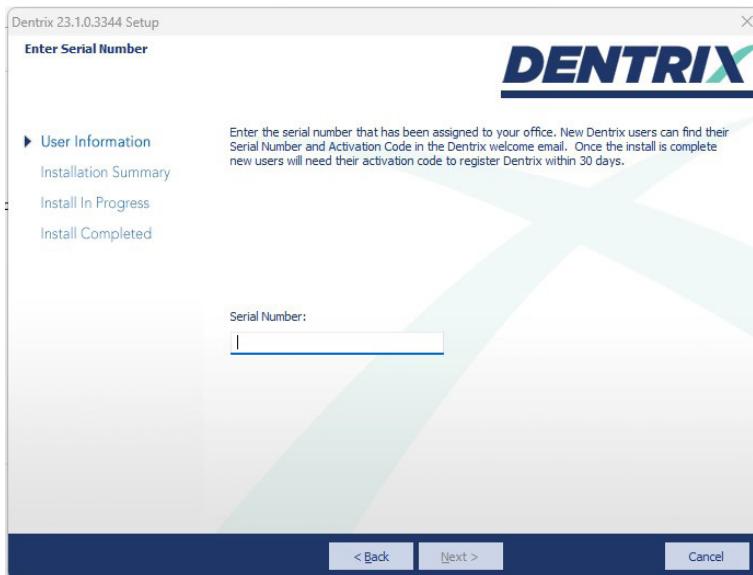
Read the Tips for a Successful Installation before beginning the installation. If you install Dentrix on a networked system, you must complete the installation process on each workstation. Install Dentrix on the file server (the computer where the practice database will be stored) first.

To install Dentrix 23.12

1. Click the link in the email message you received after purchasing Dentrix.

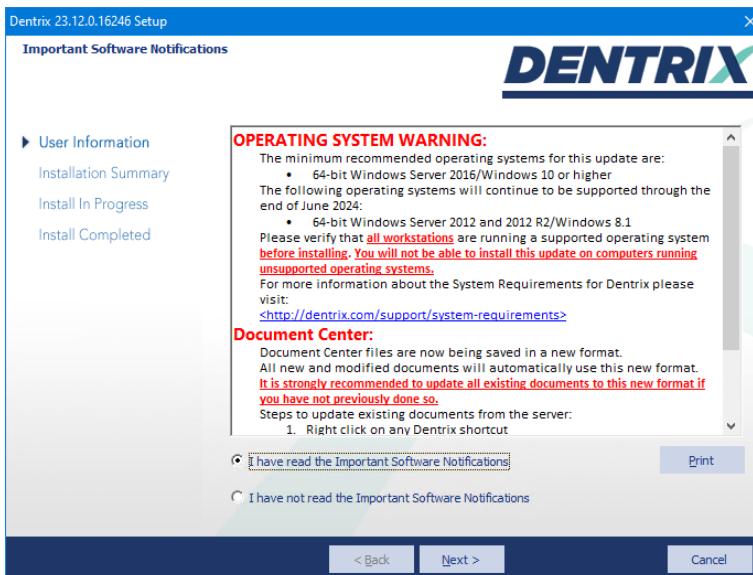
The Enter Serial Number screen appears.

Note: If you are upgrading from a previous version of Dentrix, this screen does not appear. The Dentrix installation program recognizes your serial number from the previous version.



2. Type your serial number, and then click **Next**.

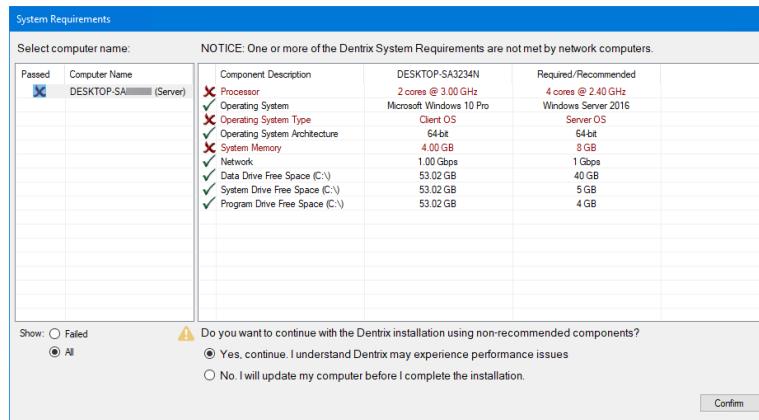
The Important Software Notifications screen appears.



3. Read the agreement, select **I have read the Important Software Notifications**, and then click **Next**.

A system requirements check runs. If your system meets the requirements, the installation continues

to the next step. If it does not meet the requirements, the **System Requirements** dialog box displays what your system needs in order to meet the system requirements.

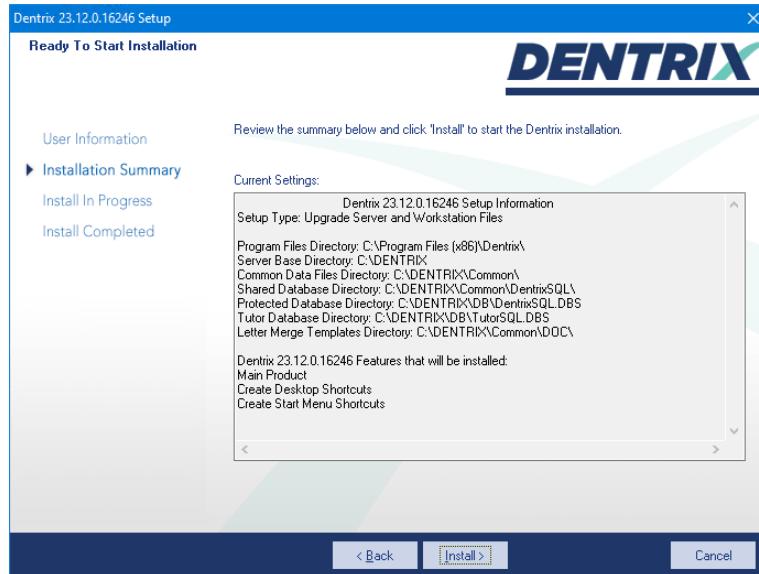


4. (Optional) If the **System Requirements** dialog box appears, verify the system requirements, select one of the following, and then click **Confirm**:

- **Yes, continue. I understand Dentrix may experience performance issues.**
- **No, I will update my computer before I complete the installation.**

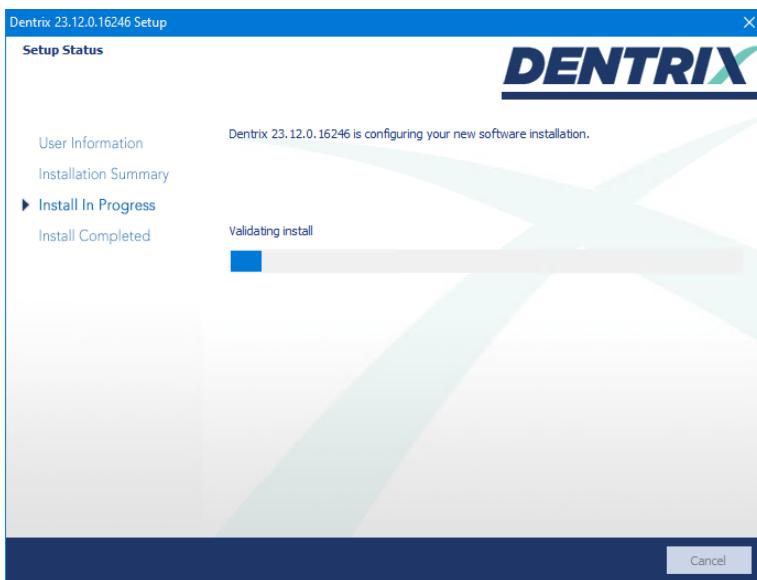
Note: A green check mark indicates that a component meets the requirements. A red "X" indicates that a component does not meet the requirements.

The Ready To Start Installation screen appears.

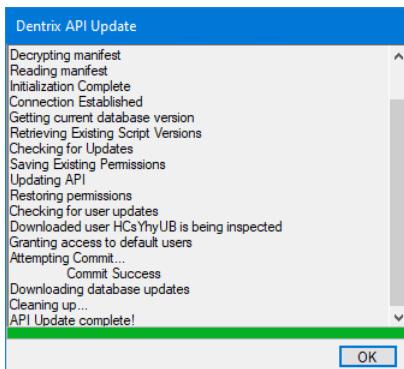


5. Review the summary, and click **Install**.

The Setup Status screen appears.

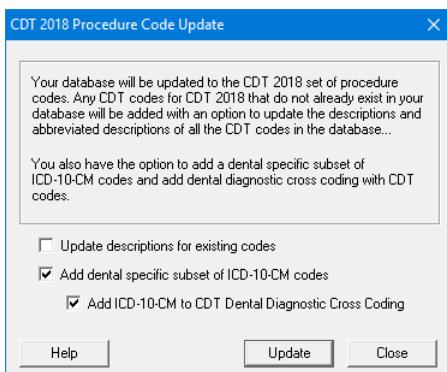


The **Dentrix API Update** dialog box appears.



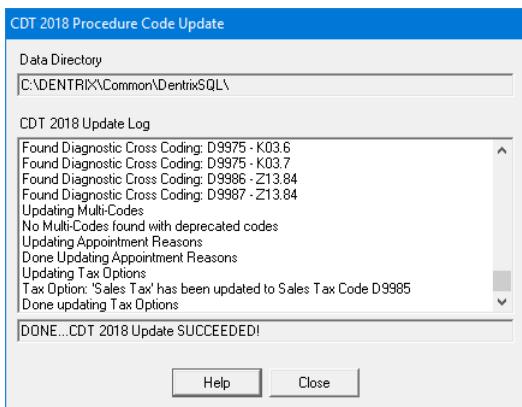
- When the update is complete, click **OK**.

The **CDT Procedure Code Update** dialog box appears.



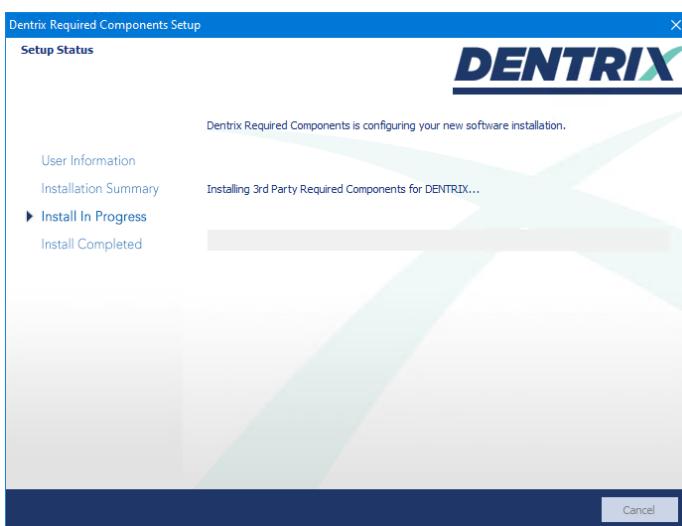
- To update the descriptions of existing codes, select **Update descriptions for existing codes**, and then click **Update**.

The **CDT Procedure Code Update** dialog box appears.

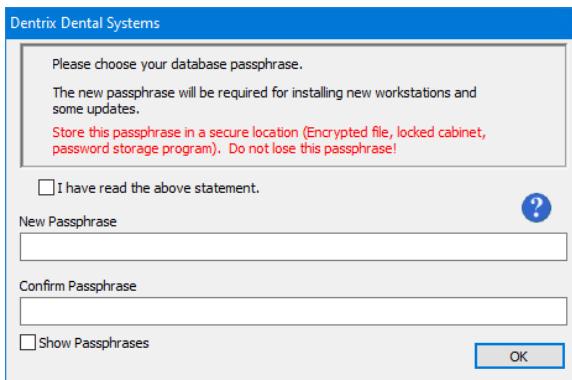


- Click **Close** when the update is complete.

The Setup Status screen for required components appears.



The Passphrase screen appears.



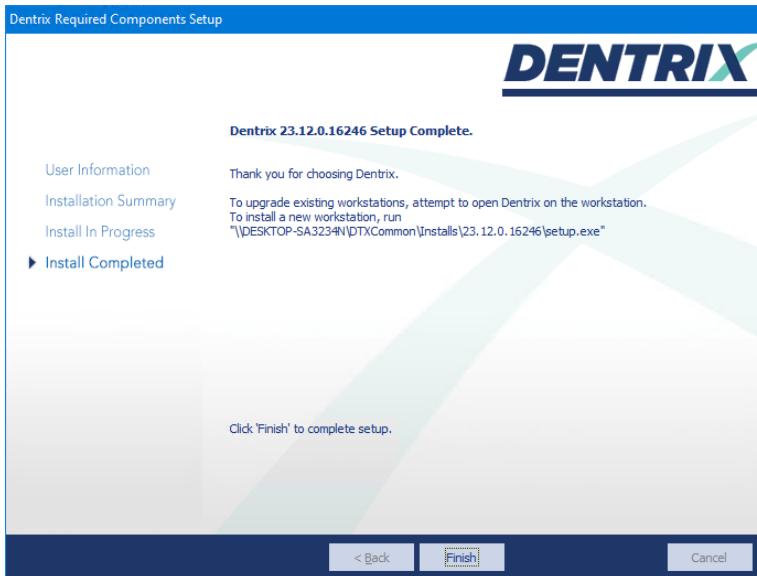
- Do the following, and then click **OK**:

- Read the message and select **I have read the above statement.**
- Enter a passphrase that is at least 10 characters long and contains at least one of each of the following: a capital letter, a lower case letter, a number, and a special character (asterisk, question mark, or other character).

If you have installed eSync on the computer, the Dentrix installation prompts you to download the latest version of eSync and the eSync plug-ins.

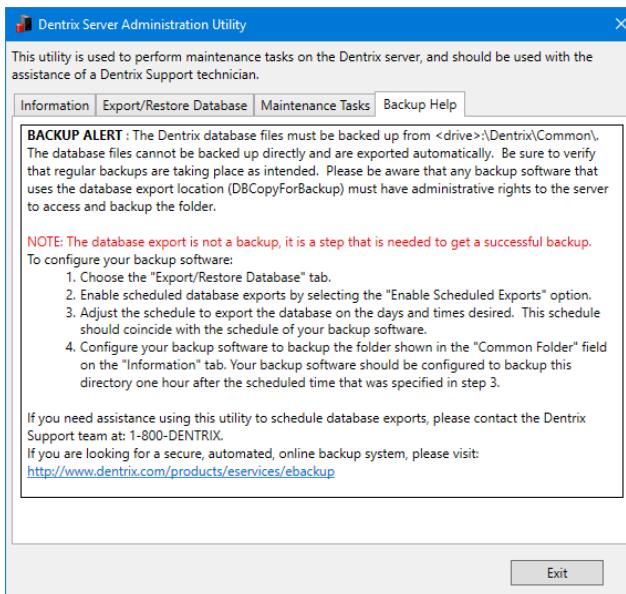
If you use eSync, and eSync is not installed on the computer, you must download and install the latest version of eSync.

The Setup Complete screen appears.



10. Click Finish.

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.

11. 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 (configure any third-party firewalls 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 Dentrix 23.12

You must register and activate Dentrix 23.12 to run your software and receive update information. We recommend that you register and activate Dentrix at the time of installation. If you do not register at the time of installation, the activation dialog box appears when you open any Dentrix module. You have 30 days in which to register before registration/activation is required to use your software.

To register/activate your software, click **Register Now**. To temporarily skip the registration/activation process, click **Register Later**.

REGISTER NOW

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

To register your software now

1. From any workstation, click **Register Now** in the registration/activation screen.
The serial number you entered when you installed Dentrix 23.12 appears in the **Serial Number** field in the registration/activation screen.
2. Verify that the serial number matches the serial number assigned to your office. You can find your serial number in the email message you received when you purchased Dentrix 23.12.
3. In the **Activation Code** field, enter the activation code assigned to your practice. You can find your activation code in the email message you received when you purchased Dentrix 23.12.
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 an internet connection. If you do not have an internet connection, you must manually enter the registration code.

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 completes successfully.
2. Click **OK**.

REGISTERING MANUALLY

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

Important: The activation code in the email you received or 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 completes successfully.
4. Click **OK**.

REGISTERING LATER

If you click **Register Later** in the registration/activation screen, the reminder continues to appear once a day when you open Dentrix until the end of your 30-day grace period. After 30 days, the **Register Later** button is disabled, and you must register Dentrix 23.12 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 Update Manager to deploy Dentrix 23.12 to a computer on your network without accessing the setup files on the server. Once you upgrade one computer to G7.7, 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 Dentrix, once you install updates on any computer on your network, Dentrix requires you to install the updates on all other computers on your network.

With Dentrix 23.12, this process is automated if you have already upgraded to Dentrix 23.12 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 finishes, you are prompted to install the updates again when you try to access Dentrix.

Installing Dentrix 23.12 Over a Network

After you have upgraded to Dentrix 23.12 on your server, follow these instructions and install Dentrix 23.12 from the setup files on the server.

To install Dentrix 23.12 over a network

1. Depending on the version of Windows you are running, right-click the Windows Start button and click **Run**.
2. Enter \\[server]\\Common\\Installs\\23.12\\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 23.12 and the Required Components.
4. Click **Install Dentrix 23.12**. 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 installed, the Setup Complete screen appears.

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

