



Global Dental Solutions, LLC[®]

full service dental laboratory

Customer Portal User Guide



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1 How to Access the Customer Portal

1.1 Logging in

To access your account, follow these steps:

Account Login

1. Visit the portal at <https://myaccount.XXXXXXXXXX.com> or click Account Login on the homepage
2. Enter Your **Username** and **Password**.
3. Click Login to access your account.

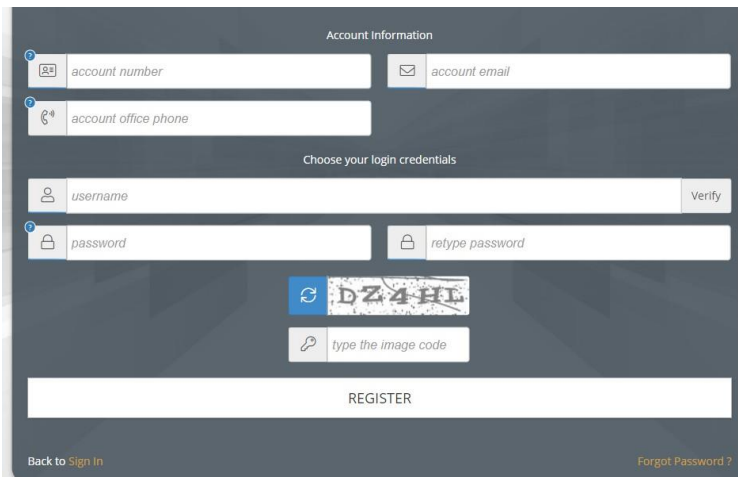
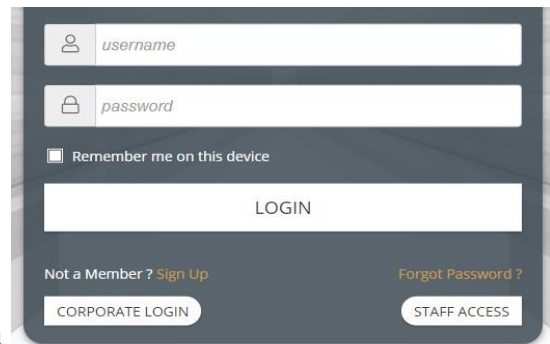
• Member Login

For Existing Members:

- Enter your Username
- Enter your Password
- Click Login

Not a Member?:

- Click Sign Up →
- Account Information Section
 - Enter in Account Number- Found on monthly statement
 - Enter in Account Email- Email that is on file for your account
 - Enter in Account Office Number- Phone number on file for your account.
- Choose your Login Credentials
 - Username- Chose a Username, Office email recommended (Min 5 Character)
 - Click Verify
 - Password – Create a Password
 - Retype Password
 - Enter the image code
 - Click Register



Due to HIPAA requirements, password must meet the following criteria:

- Minimum of 8 characters
- Contain at least one numeric character. (Ex: 0-9)
- Contain at least one special character. (Ex: @, #, \$)
- Contain at least one uppercase character
- Contain at least one lowercase character
- Cannot match username
- Cannot match previous password



Unable to locate your Account?:

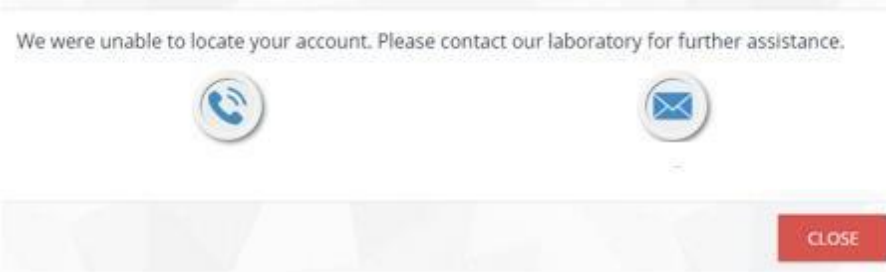
- **Possible Errors:**

- Phone number or Email do not match your account
- Incorrect account number

Unable to verify your information?:

- **Possible Errors:**

- Existing Account



- **Corporate Login**

For Customers with Multiple Locations:

- Have a consolidated view of all your accounts.
- Contact the Lab by phone at 866-905-1111 to obtain a username and password

- **Staff Access**

For Customers with Multiple Doctors and/or Office Staff:

- Choose from 3 different levels of access to assign to users on your account.

- **Basic**

- View Cases
- View Pickups
- Messages
- Web Settings
- Reset Password

- **Standard**

- View Statements
- Submit RX and View Cases
- Schedule and View Pickups
- Resources
- Preferences
- Messages
- Contact Lab
- Settings

- **Full Access**

- Same access as Member login
- Includes All Access in Standard plus:



- View and Make Payments
- Upload Files

2 Home Page Navigation

The Home Page provides quick access to the following features:

- Account Information
- Quick Links
 - Accounting
 - Make and view payments and balances
 - View Purchases and Statements
 - Cases
 - Submit RX
 - View Cases
 - Pickups
 - Schedule and View Pickups
 - Resources
 - My Files
 - Preferences
 - General Instructions
 - Alerts & Notifications
 - Accounting Preferences
 - Messages
 - View and Send Messages
 - Fulfillments
 - Order Supplies
 - Return Labels
 - Settings
 - Web Settings
 - Staff Access
 - Reset Password

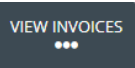
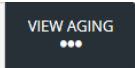




3 Account Management

3.1 Make Payments

- Select the type of payment you would like to make
 - **Total Balance** (Includes past due balances, current statement- including all invoices and cases for the month) – less any payments or credits issued during the current month
 - **Balance Due Now** (Includes past due balances and current statement)- less any payments or credits issued during the current month.
 - **Past Due Balances** (Includes any balance past due by 30+ days)
 - View Aging – See details
 - **Other Amount-** Enter any payment amount you would like to make
 - **Selected Invoices**
 - View Invoices – All unpaid invoices
 - Choose invoice to pay. Hold SHIFT and highlight invoices to pay multiple



Make Payment

I Would Like To Pay

TOTAL BALANCE \$0.00	BALANCE DUE NOW \$0.00	PAST DUE BALANCES \$0.00	VIEW AGING ...	OTHER AMOUNT ???	SELECTED INVOICES \$0.00	VIEW INVOICES ...
-------------------------	---------------------------	-----------------------------	-------------------	---------------------	-----------------------------	----------------------

Payment Notes:

Card Information & Billing Information

USE CARD ON FILE SAVE CARD ON FILE

Card Number:

Expiration Date (MM / YY): Security Code:

Authorized By:

Name On Card:

Address 1: Address 2:

City: State:

Zip Code: Country:

PROCESS PAYMENT: \$0.00



3.2 View Balances & Payments

- Recent Activities

- Transactions completed during the current month

\$0.00	04/15/2020
Charges	Last Payment Date
\$1,638.00	\$1,638.00
Payments	Last Payment Amount
\$0.00	\$0.00
Credits	Unapplied Credits
\$0.00	\$0.00
Writeoffs	Unapplied Payments

- Aging Summary

- Account Detail for Balances Due

\$0.00	\$0.00
Past Due 30	Total Past Due
\$0.00	\$2,588.00
Past Due 60	Current Balance
\$0.00	\$2,588.00
Past Due 90	Total Due Now
\$0.00	\$2,588.00
Past Due Over 90	Total Balance

- Payments & Credits

- Payments made and Credits Issued to Account

Payments & Credits

Ref #	Date	Type	Status	Amount
23747	04/15/2020	Visa	Failed	\$1,638.00
23748	04/15/2020	Visa	Success	\$1,638.00
23405	02/26/2020	Check	Success	\$1,628.68
23135	02/04/2020	Check	Success	\$1,334.00
23134	02/04/2020	Check	Success	\$43.18
22985	01/15/2020	Visa	Success	\$2,159.00

- Distribution

- Payment detail by Case- Click on amount for more details

Distribution

Case #	Amount	Write Off	Patient Name
10104286	\$26.68	\$0.00	Finance Charge
10102961	\$109.00	\$0.00	
10102958	\$95.00	\$0.00	
10102563	\$248.00	\$0.00	
10101902	\$29.00	\$0.00	
10100598	\$50.00	\$0.00	




3.3 View Statements

- Overview of Account Statements

Period From	Period To	Current Balance	Past Due 30	Past Due 60	Past Due 90	Past Due Over 90
03/01/2020	03/31/2020	\$2,588.00	\$1,638.00	\$0.00	\$0.00	\$0.00
02/01/2020	02/29/2020	\$1,638.00	\$0.00	\$0.00	\$0.00	\$0.00
01/01/2020	01/31/2020	\$1,628.68	\$1,377.18	\$0.00	\$0.00	\$0.00
12/01/2019	12/31/2019	\$1,377.18	\$2,159.00	\$0.00	\$0.00	\$0.00
11/01/2019	11/30/2019	\$2,159.00	\$0.00	\$0.00	\$0.00	\$0.00
10/01/2019	10/31/2019	\$1,198.47	\$2,032.78	\$655.07	\$122.72	\$0.00

- View PDF Statement by clicking on line



Global Dental Solutions, LLC®
Full service dental laboratory

Global Dental Solutions
8215 Roswell Rd Bldg 500
Atlanta, GA 30350
866-905-1111

Statement

Statement Date	01/31/2020
Statement Number	[REDACTED]
Page Number	[REDACTED]
Due Date	[REDACTED]
Account Number	[REDACTED]
PO#	[REDACTED]
Please Pay This Amount	\$225.05

Visit us at <http://globaldentalsolutions.com/> and click on Account Login to set up electronic payments.

Account Number: [REDACTED] PLEASE RETURN TOP PORTION WITH PAYMENT

Monthly Activity

Date	Case Number	Reference	BalFwd**	Prepay	Payment	Invoice	Db/Cr/FC*	Applied	Amt. Due
Prior Statement Periods Open Items (Balance Forward**)									
			\$102.50						\$102.50
This Statement Period									
1/31/20	554712	Finance Charge					2.05		\$2.05
						120.50			\$120.50
Total:			\$102.50			\$120.50	\$2.05		\$225.05

Customer Summary

Balance Forward**	\$102.50
Prepays	\$0.00
Payments	\$0.00



3.4 View Purchases

- Overview of Purchases, Credits, Cases in Progress, Remakes

View Purchases

<p>\$0.00 Month-To-Date</p> <p>\$0.00 Quarter-To-Date</p> <p>\$5,828.00 Year-To-Date</p> <p>PURCHASES</p>	<p>\$0.00 Month-To-Date</p> <p>\$0.00 Quarter-To-Date</p> <p>\$0.00 Year-To-Date</p> <p>CREDIT</p>
<p>\$0.00 Cases In Production</p> <p>PURCHASES IN PROGRESS</p>	<p>\$0.00 Month-To-Date</p> <p>\$0.00 Quarter-To-Date</p> <p>\$1,107.00 Year-To-Date</p> <p>REMAKE</p>

4 Cases

4.1 Submit RX

- Fill in Digital RX to submit a case to the lab

Submit RX

NEW CASE
 REMAKE CASE
 ADJUST CASE

Doctor Information
 Doctor Name:

Shipping Address:

Patient Details
 First Name: Last Name: Chart Number: Sex:

Case Details
 Shade: Rx Number: Coupon: Scanner:

Rx Submission Method: Submission Date: Requested Return Date:

Comments:

RUSH
 THIS CASE IS AUTHORIZED AND SIGNED BY:
 Doctor: Complete Comfort Dental

SAVE TEMPLATE
 Save this design as a template for future submissions



- Use the Drop Down Menu to Select Prescribing Doctor

Doctor Name:

+ New Doctor

- If the Doctor is not present in the drop down, click on + New Doctor
 - Enter Prefix
 - First Name
 - Last Name
 - Email
 - License Number and State Issued
 - Doctors NPI #
 - Save

New Doctor

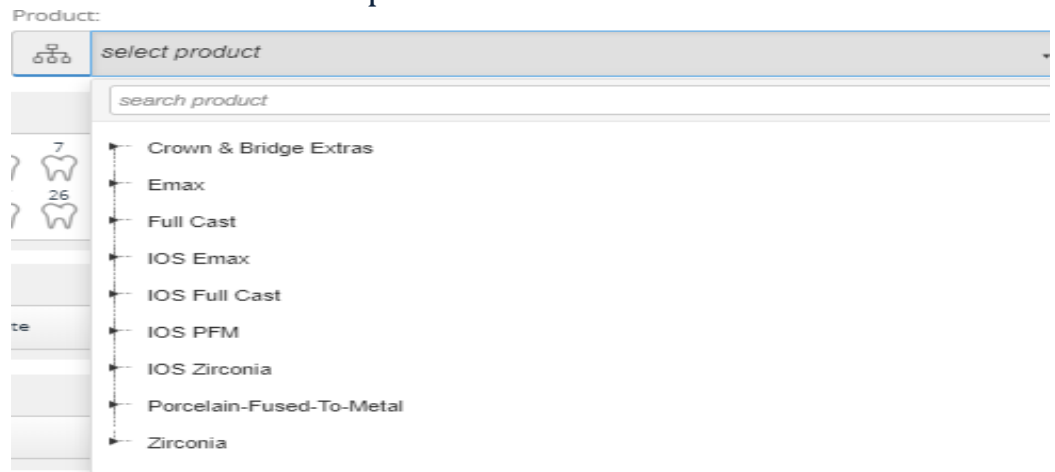
- Enter Patient Details
 - First Name
 - Last Name – Required
 - Chart Number
 - Sex
- Enter Case Details
 - Shade – Required
 - RX Number
 - Coupon- If redeeming for Case
 - Scanner- Required if submitting digital case
 - Comments – Add any additional information
 - Requested Return Date- Required
 - If Rush Case- Please contact the lab 866-905-1111

- Select Product Details

○ PRODUCTS +



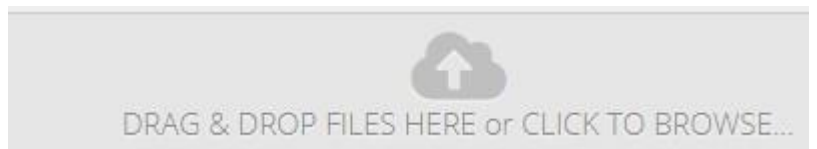
- Use Drop Down to Select Type
- Use Drop Down to Select Product for Treatment



- Fill In Preferences Form as Applicable
 - If selection is blank lab will use preferences on file.
 - If no preferences are on file, the default values will be used:
 - Tooth Number
 - Due Date Conflict
 - Design
 - Occlusal Clearence
 - Contact
 - Margin Design
 - Digital Occlusion
 - Pontic Design
 - Coats
 - Margin Prep
 - Metal Design



- Click Save
- Attach any pictures or digital files or notes
- Drag and Drop file or click to browse for file
 - All File Types except CBCT DICOM accepted



- Watch Bar for File upload





SAVE TEMPLATE
Save this design as a template for future submissions

Template Name:

FCZ Dr Eric

SUBMIT CASE

- Rush- If selected contact the lab directly to ensure we can meet your requested date.
- Select Box- This Case is Authorized and Signed By:
- Template can be saved for future orders
- Name the Template
- Submit Case
- Click Request Pickup to generate FedEx label
- Click Print Icon to print the work order
- Include Work order in each case sent to the lab

Submit Rx

Case number 10114797 successfully submitted.

PRINT WORK ORDER REQUEST PICKUP

CLOSE

4.2 View Cases

View your entire Case History with Global Dental Solutions

- Until the status of the case is invoices dates and times listed will appear as estimates. If you have any questions on the case, please contact the lab at 866-905-1111 to speak with our customer service representatives.
- If your practice has multiple doctors you can filter case history to cases by doctor.
- Click the Export Button to have your Case History exported to excel

View Cases

Doctor Name:

All Doctors --

EXPORT

Case #	Status	Patient Name	Address	Date In	Est. Arrival Date	Invoice Date	Req. Return Date	Shipment Date	Rx Number	Delivery Status	Doctor Name	Doctor No.	Rush	Total
10114707	Submitted	Lisa TEST		04/20/2020 08:33 AM			05/04/2020			-- NA --		3337		\$0.00
10113584	Invoiced			03/19/2020 03:11 PM		03/31/2020 04:55 PM	04/08/2020	03/31/2020 05:08 PM		On its way		3337		\$35.00
10113580	Invoiced			03/19/2020 12:58 PM		03/30/2020 08:51 AM	04/01/2020	03/30/2020 10:08 AM		On its way		3337		\$190.00
10113582	Invoiced			03/19/2020 02:38 PM		03/24/2020 11:35 AM	03/30/2020	03/24/2020 12:14 PM		On its way		3337		\$49.00
10112793	Invoiced			03/13/2020 06:07 PM		03/30/2020 09:28 AM	04/07/2020	03/30/2020 11:31 AM		On its way		3337		\$380.00
10112791	Invoiced			03/13/2020 05:19 PM		03/23/2020 01:00 PM	03/26/2020	03/23/2020 01:58 PM		On its way		3337		\$120.00
10112788	Invoiced			03/13/2020 05:22 PM		03/30/2020 08:51 AM	03/30/2020	03/30/2020 10:08 AM		On its way		3337		\$0.00



5 Pickups

Easily Schedule Case Pickups, Print Shipping Labels and View your Case Pickup Status

5.1 Schedule Pickups

- Select Pickup Date and Time
 - Pickup From- Select a time that is at least 2 hours from the current time
 - Pickup To- Select a time that is before 5:00 pm local time
- Provide any relevant comments, if necessary
- Select Schedule Pickup

SCHEDULE PICKUP

Schedule Pickup

Service Center:

Global Dental Solutions

Customer ID:

101670

Customer Phone:

407-830-4401

Doctor Name:

[Redacted]

Carrier Information

Carrier:

FedEx

Service Type:

STANDARD OVERNIGHT

Pickup Details

Schedule Date:

2/11/2025

Pickup Date:

2/11/2025

Pickup From:

8:00 AM

Pickup To:

5:00 PM

Number Of Packages:

1

Total Weight (Lbs):

1

Comments:

[Comments field]

Warning: Pickup date is today

SCHEDULE PICKUP



5.2 View Pickups

- View all pickups and status
- For FedEx Cases- Select the Tracking # to view tracking status
- Reprint FedEx labels
- Request Pickups

View Pickups

+ REQUEST PICKUP

		Id	Scheduled On *	Pickup Date	From	To	Status	Carrier	Tracking #
			from to	from to			All		
		15099	10/01/2019 07:38 AM	10/01/2019	14:00	17:00	Completed	FedEx	790991090689
		14805	09/16/2019 02:30 PM	09/17/2019	14:00	18:00	Completed	FedEx	795787875746
		14803	09/05/2019 12:41 PM	09/09/2019	14:00	17:00	Completed	FedEx	795784020505
		14108	08/08/2019 08:30 AM	08/08/2019	12:00	15:00	Completed	FedEx	795783209460
		13984	07/31/2019 01:47 PM	08/01/2019	12:30	15:30	Completed	FedEx	795749993435

6 Resources

6.1 My Files

- Add patient files for the lab

6.2 Public Files

- Store any information specific to your practice and the lab

7 Preferences

7.1 General Instructions

- Add any instructions that you would like to save and have applied to all future cases
- Save Changes

General Instructions


General Instructions:

Enter General Instructions for all future case here



7.2 Alerts & Notifications

- **Select Alerts you would like to receive when action has been taken on your account**
 - Alert Me of Changes as They Occur During the Day-You will receive an email each time:
 - New case is entered
 - Hold is placed on a case
 - Case is invoiced
 - Your account is put on COD
 - Alert Me Once at the end of the day- You will receive one email per day containing:
 - Cases Received
 - Cases Shipped
 - Cases placed on Hold
 - All invoices in a combined PDF document
- **Select Notification Method**
 - Email (Preferred Method)
 - Text

Alerts & Notifications 

Alert Me Of Changes As They Occur During The Day:

<input type="checkbox"/> NEW CASE IS ENTERED	<input type="checkbox"/> CASE PLACED ON HOLD
<input type="checkbox"/> CASE IS INVOICED	<input type="checkbox"/> CUSTOMER PLACED ON COD

Alert Me Once At The End Of The Day:

<input type="checkbox"/> CASES RECEIVED AND SHIPPED	<input type="checkbox"/> ALL INVOICES FOR THE DAY IN ONE PDF FILE
---	---

Notification Methods:

<input type="checkbox"/> EMAIL <small>(for Invoices, billing E-mail address will be used, if available)</small> Email: <input type="text"/>	<input type="checkbox"/> TEXT MESSAGE <small>(applies only to alerts sent throughout the day)</small> SMS Cell Phone Number: <input type="text"/> Service Provider: <input type="text" value="American Messaging Pager"/>
---	---

SAVE CHANGES



7.3 Accounting Preferences

- **Select method of receiving monthly statements**
 - PDF statement via email
 - Statement printed and mailed to office
 - Email and Printed Statement mailed to office

8 Messages

8.1 View Messages

- **View messages from the lab regarding FedEx labels, statements and more**

Messages

EMAILS 5 INQUIRIES search...

Eljevonja.Chapman@globaldentalsolutions.com
GDS Daily Case Digest
 From: Global Dental Solutions Customer ID: 101670- [REDACTED] Case Summary Alert for: 02-06-2025 10:45 PM Cases Received Today Doctor Patient Name Case Number [REDACTED]
 02/06/2025 10:46 PM

Eljevonja.Chapman@globaldentalsolutions.com
GDS Daily Case Digest
 From: Global Dental Solutions Customer ID: 101670- [REDACTED] Daily Case Summary Alert for: 01-08-2025 10:45 PM No Cases Received Today Doctor Patient Name Case Number Cases Shipp
 01/08/2025 10:46 PM

Eljevonja.Chapman@globaldentalsolutions.com

8.2 Send Messages

- **Send Messages to the lab**
 - Enter Subject and Message
 - Click Send Message

Send Message

8215 Roswell Rd Bldg 500
 8215 Roswell Rd Bldg 500, Atlanta, GA 30350
 View larger map

Global Dental Solutions

ADDRESS
 8215 Roswell Rd Bldg 500
 City: Atlanta, State: GA
 Zip Code: 30350, Country: US

CONTACTS
 Office Phone: 866-905-1111
 Second Phone: 404-256-0501
 Fax: 404-256-1404
 Email: CustomerService@globaldentalsolutions.com

Keep In Touch

Subject:

Department:

Message:

SEND MESSAGE



9 Fulfillments

9.1 Order Supplies

Order Supplies

- Boxes
- RXs
- FedEx return Labels
- Fee Schedules

Boxes
Quantity: 6

Order Supplies



All Supplies
Quantity: 1

Fed Ex Return Labels
Quantity: 12

Fee Schedule
Quantity: 1

[REDACTED] RXs
Quantity: 25

9.2 Order Return Labels

- Create FedEx labels without dispatching FedEx to your office

Return Labels

Service Center:

Customer ID:

Customer Phone:

Doctor Name:

Carrier Information

Carrier:

Service Type:

Package Details

Package Type:

Number Of Labels:

CUSTOMER IS PAYING FOR THIS SHIPMENT



10 Settings

10.1 Change Web Settings

Web Settings

Language

ENGLISH FRANÇAIS ESPAÑOL DEUTSCH

DUTCH ROMÂNĂ

User Interface - Reset module layout...

Module:

Add To Homepage

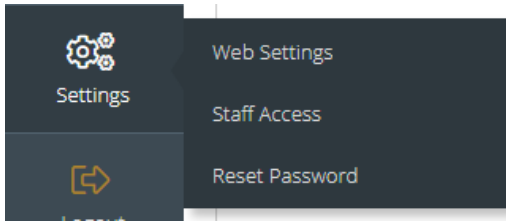
By adding the web app to home screen, you no longer need to open the browser and the application would act similar to regular app.

Android: To add this web app to the home screen, open the browser option menu and tap on **Add to homescreen**. The menu can be accessed by pressing the menu hardware button if your device has one, or by tapping the top right menu icon: (Available on Chrome)

iOS: To add this web app to the home screen, tap and then **Add to Home Screen** (Available only on Safari).

- **Select Language**
- **Select Layout**
- **Instructions on how to add the app to your mobile device's home screen**

10.2 Create Staff Login



- **Login to the Member Portal**
- **Select Settings**
- **Select Staff Access**
- **Enter Staff Information in all Fields**
- **Select Access**
- **Create Login and Password**
- **Select Save**

General Info

Name: Position: Office Phone:

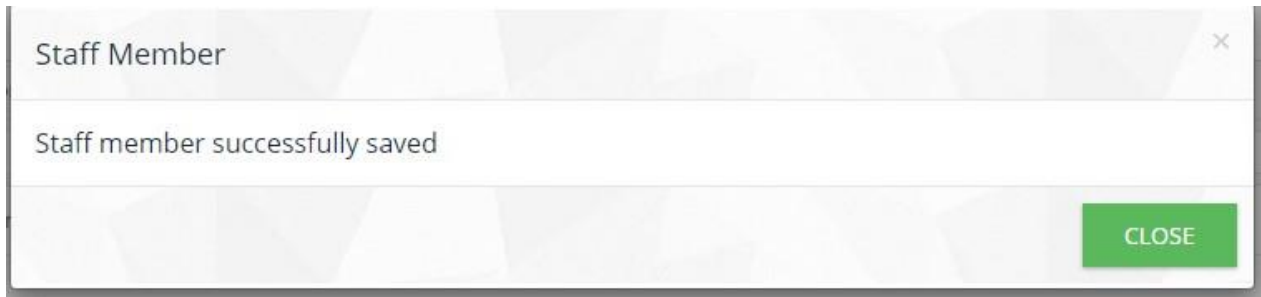
Extension: Cell: Birth Date:

Web Access

ENABLED

Email: Access Level:

Password: Very Strong Retype Password:



10.3 Reset Password

Reset Password



Current Password:

New Password:

Retype New Password:

SAVE CHANGES

- Enter Current Password
- Enter New Password
- Follow Password Requirements
- Retype New Password
- Save Changes

i Due to HIPAA requirements, password must meet the following criteria:

- Minimum of 8 characters
- Contain at least one numeric character. (Ex: 0-9)
- Contain at least one special character. (Ex: @, #, \$)
- Contain at least one uppercase character
- Contain at least one lowercase character
- Cannot match username
- Cannot match previous password