

Penny Reed & Associates Numbers Tracking Tools – 2017 Platform Upgrade and Instructions

Welcome to 2017! We hope it's your best year yet!

As technology evolves, we have been researching and working on a solution to make tracking your numbers more secure and accessible. While your software has a wealth of information, it doesn't display it in a way that makes it simple for dental business owners, managers and teams to track their ongoing progress.

Many of you are familiar with the Excel version of the monitors. We are excited to present the Google Sheets platform – which has no software to buy or upgrade. Included in your fee, as a client or former client who purchased the tools, is your login for the 12-month period (calendar year) of your purchase.

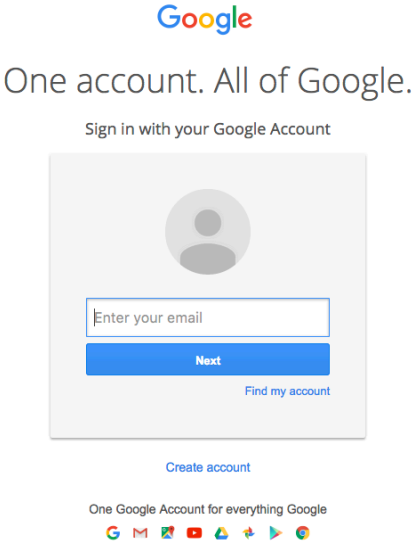
Here are the most important things you need to know to get started with the new platform:

1. **Very Important** – Use the spreadsheets in the cloud only – **Do not download and use in Excel – or formula protections will be lost** – resulting in potential additional fees to repair the spreadsheets if needed. We can only support the version kept in the cloud, so be sure not to download it to use it.
2. Google Chrome is the recommended browser to use for Google Sheets. If you don't already have Google Chrome downloaded, you may find it at <https://www.google.com/chrome/browser/> or simply go to your search bar and type in Google Chrome.
3. Your account is secure. We will have access to the backside and data should you need to change a team member name or have other support issues.
4. Your data is backed up. One of the main reasons we went to this platform is that on occasion a client might have a virus or malware on their computer resulting in a loss of data. These spreadsheets are always backed up.
5. It saves automatically – really. You don't have to press save. It does it continuously.
6. They are accessible – with your secure login, from any computer (Mac or PC) with an Internet connection.
7. You must be connected to the Internet to use them.

I. GETTING STARTED

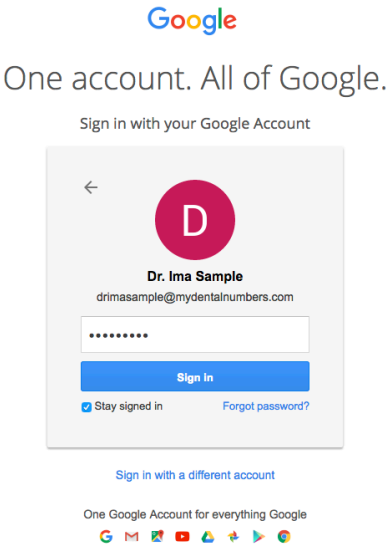
To login, go to accounts.google.com or [click here](#)

Your screen will look like this:

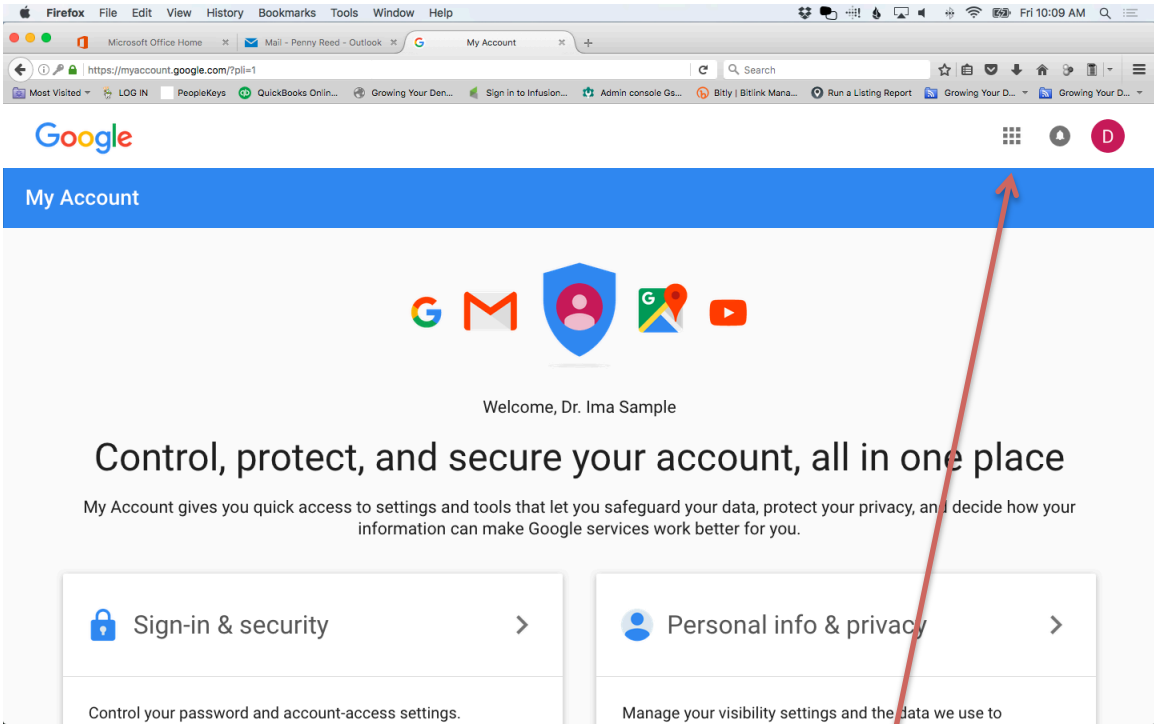


You will login with your @mydentalnumbers.com user id. If you haven't received this or aren't sure how to proceed, call 1.888.877.5648 or email clientservices@pennyreed.com

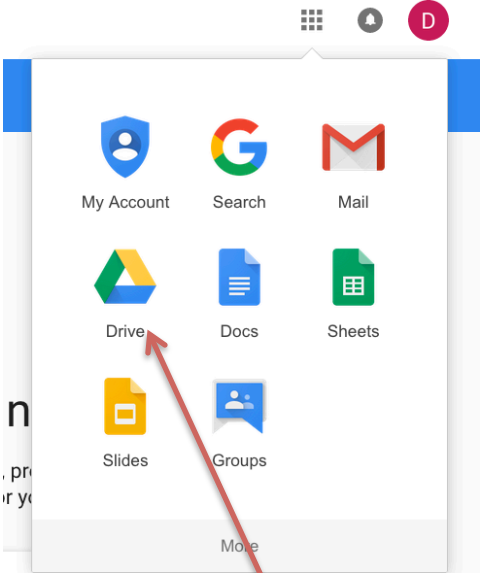
Once you are logged in, you will see a folder with your Monitors/Numbers Tracking Tools in there.



Your login screen will look like this:

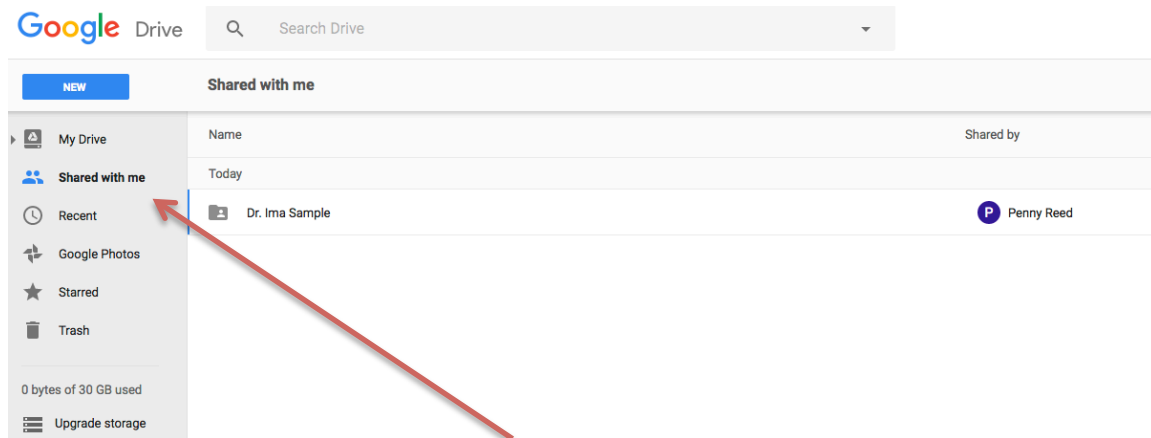


And in the upper right hand corner you will see a grid of boxes. Click it and a window, like the one below, will open.

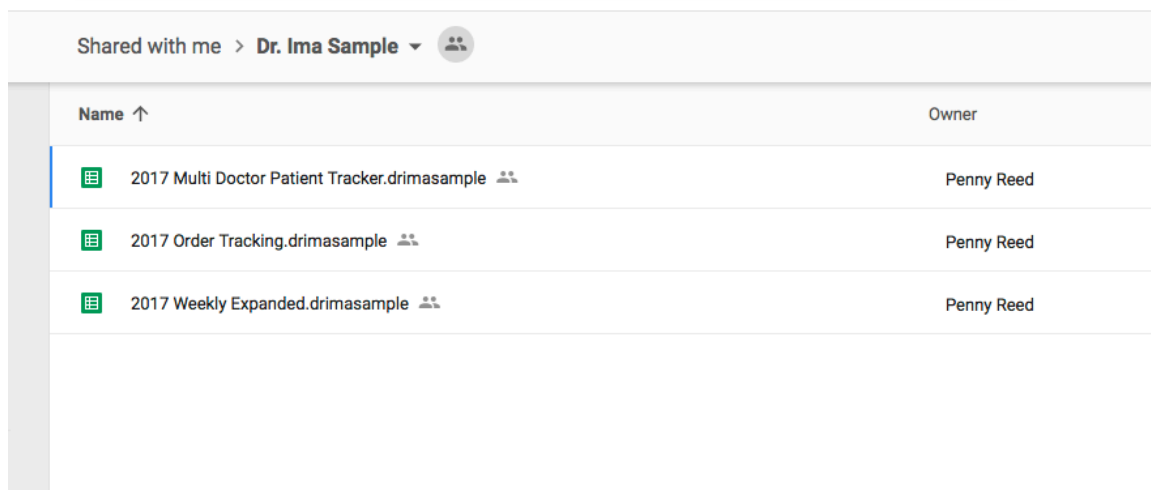


Click on Drive.

You will see a screen like the one below.



Click on Shared with me and you will see your folder with your Monitors.



Now you are in and ready to begin using your numbers tools.

II. USING THE MONITORS/NUMBERS TOOLS – TIPS

- A. Use in Google Sheets cloud only – monitors will not be supported if downloaded and used in Excel.
- B. Focus on the purple areas, these are the ones open for data entry.
- C. The area outside the spreadsheet page is not protected, in the event you wish to make notes.
- D. It is not necessary to save the document. Document changes save automatically (one of the main reasons we changed platforms for you).
- E. There will be a slight pause after entering figures in a cell. It is likely you won't notice this, as you will be looking at your practice

management reports to get the next data set. Please note this is completely normal.

- F. As you are entering data, please be sure to click or highlight the cell you are on to be sure you are entering in the area you wish to.
- G. Note that Sunday is on the monitor, this will help you separate weeks.
- H. If you desire formula changes, please contact us. *Any intentional changes to your worksheet that require us to reprogram are subject to a \$50 per hour programming fee.*
- I. If you notice that a cell is unprotected that should be protected or any other suspected issue with setup, please contact us immediately and let us know the sheet name, row/column, etc.

III. PRINTING AND SHARING

- A. Printing and Saving to PDF
While the printing options are different than with Excel, there are many ways to print and archive your data.
- B. You will notice that there is a new tab in each month with the word "Totals." This will be the sheet you wish to print for each week. To see day-to-day details, it is best to simply view the tab for that month and move the mouse left and right or up and down to see all rows and columns. This can also be done using the up/down and left/right arrow keys.
- C. Sharing with others for viewing only (other users may view but not edit). Because this is a new tool, we ask that you contact Ellen, clientservices@pennyreed.com and give her specific emails that you would like to have sharing/viewing access with these tools. For example, if the office manager is completing the spreadsheets, and the doctor wants to view, you would send us the doctor's preferred email for viewing privileges. So if his/he email is iamthedoctor@gmail.com you would send that information to us and we will share with them, in a view only capacity.
- D. Sharing allows others to view more detailed areas that may not be necessary to print.

We are so excited about the new format for these tools. Rest assured that your data is secure and if you see any tweaks that need to be addressed or if you would like additional support, contact Ellen at clientservices@pennyreed.com for a one-on-one screen share.