



1. Go to the Excel Orthodontics, Inc. website at <u>https://myaccount.excelorthodontics.com</u>.

Note: Orthoviewer (a free software) must be installed in order to view digital files.

2. Select "Login" from the menu.



3. Enter User Name and Password.

LOGIN							
Access your account using your Username/Password and gain access to all of your case and payment information.							
Username:							
Password:							
Remember me on this computer							
Login							

4. Select "Cases" from the menu.

ORTHODONTICS INC.	Account Settings Web Settin
HOME ACCOUNTING CASES PICKUPS PREFERENCES MY MESSAG	ES CONTACT LAB
Excel Orthodontics, Welcome to your Account	nt Excel Orthodontics, Inc.
 Welcome to Excel Orthodontics, Inc. Your online account is designed to provide you with optimal comwhen working with Excel. It's a valuable order management and comenables both your staff and the Excel production team to be "on the satthroughout the case production process. Use it to Securely submit new cases, including electronic file attachments. Search for current and past case information. Track case status throughout the production and shipping process. Set up automatic alerts to notify personnel of any production change. Add custom information and instructions (such as specific contact of specify how you wish to receive statements and case confirmations). 	venience and efficiency mmunication platform that ame page" at all times ges. people on your staff, special pickup and delivery req





5. Select "View Cases" from the drop down menu.

THODONTICS INC.							
	CASES PICKUPS PREFERENCES	MY MESSAGES	CONT				
	View Cases Submit Case	SUBMIT CASE	_				
INSTRUCTI	Upload File Attachments View Customer Attachments		_				
rvice Center:	Excel Orthodontics, Inc.	~					

6. The "View Cases" screen will appear. Search for your case by entering the case number or patient first or last name in the appropriate field.

	VIEW CASES								
F	Reset Filter								
							🔄 Refresh 🧏 🕎 🌌		
	Tracking	Case # 👻	Status	Patient First	Patient Last	Date In	Est. Ship Date		
			All Cases 🔻			From:	From:		
				\smile	\smile	То:	То:		
		229094	Submitted	lance	dowdle	08/04/2014			
		223442	Invoiced	Duplicates		06/06/2014	06/10/2014		
		222174	Submitted	Brandon	Farley	05/23/2014			
		001110				0511010011			

- 7. Press "Enter."
- 8. Click on the "View Case Details" icon.

		🔄 Refresh 🛐 🕎 🌌					
	Tracking	Case # 👻	Status	Patient First	Patient Last	Date In	Est. Ship Date
		T	All Cases 👻	T	T	From:	From:
						То:	То:
		229094	Submitted	lance	dowdle	08/04/2014	
V	iew Case Deta	ils 23442	Invoiced	Duplicates		06/06/2014	06/10/2014
		222174	Submitted	Name	Lastname	05/23/2014	





9. The "Invoice Details" screen will appear. Click on "View 1 Attached File."

(INVOICE DETAILS: 2	219385					_	S X
	Case #: 219 RX Number: Submitted On: Date Invoiced: 04/30/2014 00:00:00		Case Status: Invoiced Shade: Received On: 04/27/2014 23:53:00 Tracking Number:		Patient Name: Remake Reason: Requested Return Date: 05/06/2014 15:00:0 Est. Ship Date: 05/06/2014 13:00:0		nt Name: Reason: urn Date: 05/06/2014 15:00:00 np Date: 05/06/2014 13:00:00	
				Make Comments	s Uplo	ad Files	View 1 Attached File Print Invoice	
	Product	Quantity	Unit Price	Teeth N	lumbers	Total Cha	arge	Description
	761	1.00000	\$20.00			\$20.00		761 - Complete Finished 3-D Study Model

10. Click on the case file icon.



- 11. Follow the instructions on your screen in order to open the site (instructions will differ from operating system to system).
- 12. View digital file.