



DOCTOR PORTAL GUIDE

→ www.TheDentalLab.net

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WEST BERLIN, NJ

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Questions? Give us a call **856.753.6600**

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infowb@thedentallab.net

Hours:
Monday – Friday: 8:30 am – 5 pm
Saturday . Sunday
Closed

GETTING STARTED

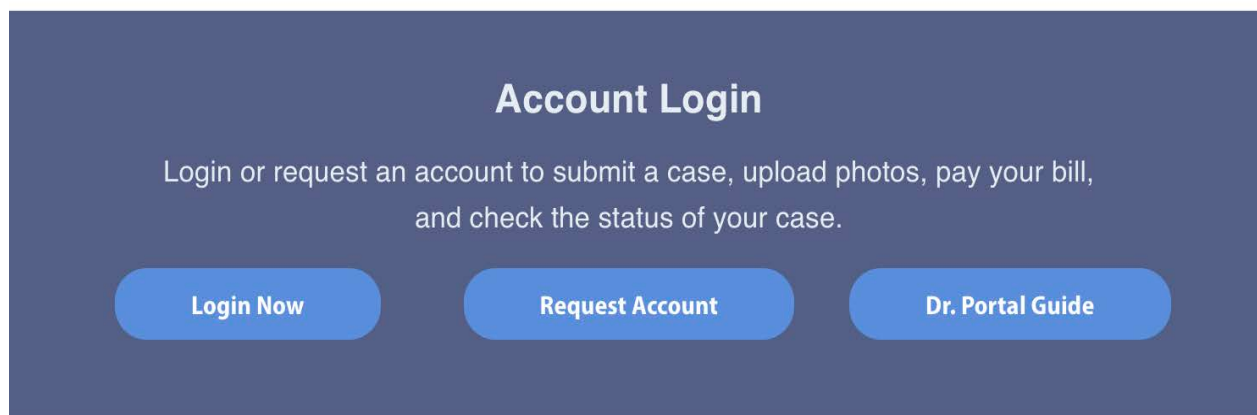
The Dental Lab Doctor Portal is a secure, HIPAA-compliant web portal for you to manage cases, upload images, view and print invoices and statements, and pay your bill.

To use the portal, you will need a username and password. If you have not already received a temporary password, you must first request an account. Please follow the steps below.

SIGNING UP

1. Go to <https://thedentallab.net/west-berlin-nj/> and scroll to the **ACCOUNT LOGIN** section (see image below)
2. Click the **LOGIN NOW** button to open your Doctor Portal
3. Or, click on the **REQUEST ACCOUNT** button to request an account
4. In **REQUEST ACCOUNT**, enter your answers to the questions in each field.
5. Click **SEND**

You will receive a pop up message that "YOUR SUBMISSION WAS SUCCESSFUL!" We will then send an email with a temporary Username (your email) and password.



[HOME](#) [ABOUT](#) [LAB DIVISIONS](#) [RESOURCES](#) [BLOG](#) [CONTACT](#)

Log in to Doctor's Portal

Username:

Password:

Forgot Password

Sign In

1. Go to <https://thedentallab.net/west-berlin-nj/> scroll to the **ACCOUNT LOGIN** section
2. Click the **LOGIN NOW** button
3. Enter the Username (your email) and temporary Password that you received in our email
4. Click **SIGN IN**



Log in to Doctor's Portal

Username:

Password:



Forgot Password

Sign In

1. To change your password, click on **CHANGE PASSWORD .**

Cases

Billing

User Setup

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Sign Out | Change Password

Atlanta Based Systems Inc.

Manage Cases

Date Range

01/15/2026

to

07/15/2026

Last Name(Leave empty to exclude)

Search Cases

Show 10 entries

Filter by case status All

Search:

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed ☒ Shipped ☒ Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed ☒ Shipped ☒ Invoiced		

Pages

Billing

User Setup

Step 04 | Change Password

Change Password

Save

Old Password:

New Password:

Confirm Password:

The Password must have 8 to 16 characters and must have at least one letter, one special character and one number.

Valid Characters:
12345678
!@#\$%^&*
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

MANAGING CASES

SORTING

When you login to the Doctor Portal, you will be taken to the **CASES** tab. Cases are automatically sorted by patient last name. You can sort by Patient, Order Date, or Status by clicking on the arrow in the sort field.

Using the **CASES** tab, you are able to:

- View case status
- Search case history
- View the case invoice
- Upload files/images to a case
- Track a UPS case sent from the lab

Atlanta Based Systems Inc.

Manage Cases

Date Range: 01/15/2026 to 07/15/2026

Last Name(Leave empty to exclude):

Search Cases

Filter by case status: All

Show 10 entries

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed ✓ Shipped ✓ Invoiced		

VIEW CASE STATUS

You can view case status from the **CASES** tab. Case statuses are:

- **Accepted:** The case has been input and is awaiting arrival of the physical case in the lab
- **Scheduled:** The physical case has arrived in the lab and has been matched to the proper information
- **In Process:** The case is in production in the lab
- **Hold:** The case is awaiting action i.e., new impressions, try-in
- **Completed:** The case has been completed in the lab. Once the case has been shipped and invoiced, the shipped and invoiced boxes will be checked in the status field

CasesBillingUser Setup

IT
Sign Out | Change Password

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Manage Cases

Date Range01/15/2026to07/15/2026Last Name(Leave empty to exclude)

Search Cases

Filter by case statusAll

Show 10 entriesSearch:

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed ✓ Shipped ✓ Invoiced		

1. To view more detailed information about a case, click on the **Patient Name**.

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Manage Cases

Date Range: 01/15/2026 to 07/15/2026

Last Name(Leave empty to exclude)

[Search Cases](#)

Show 10 entries

Filter by case status: All

Patient	Doctor	Order	Status	Carrier	Tracking Number
[Redacted]	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Ground 1 Day	
[Redacted]	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Next Day Air	
[Redacted]	Cornerstone DIRECT,	07/07/26	Completed Shipped Invoiced	UPS Ground	
[Redacted]	Cornerstone DIRECT,	06/23/26	Completed Shipped Invoiced	UPS Ground	
[Redacted]	Cornerstone DIRECT,	03/17/26	Completed Shipped Invoiced		

2. Once you click on the name, you will see more detailed information.

- **Case Number:** This is a unique, auto-generated number that is given to each case in the lab
- **Case Type:** This can be either New, Remake, Invoice. The Case Type will read Invoice when an office has ordered supplies
- **Order Date:** This is the date the case was checked in at the lab or was entered in to Web Service
- **Case Status:** This indicates where the case is in the manufacturing process
- **Ship Date:** This is an auto-generated date. It is the date the case is scheduled to leave the lab
- **Case Pan Number:** This is an internal tracking number for the lab
- **Delivery Date:** This is the date the case is scheduled to be delivered to your office
- **Case Carrier:** This is the delivery route to which your office is assigned
- **Tracking Number:** If your case was sent from The Dental Lab via UPS, you will see your tracking number here once the case is shipped. You can click on the tracking number to track the case.

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Manage Cases

Date Range: 01/15/2026 to 07/15/2026

Last Name(Leave empty to exclude)

[Search Cases](#)

[Back to Search](#)

Serviced by: Cornerstone DIRECT

[Info](#) [Invoices](#) [File](#) [Notes](#) [Cancel](#) [Remake](#) [Print Page](#)

Case Type	Order Date	Case Status	Ship Date	Case Pan Number	Delivery Date	Case Carrier	Tracking Number
New	05/05/26	Completed	05/06/26	COMB012	05/07/26	UPS Ground 1 Day	

Services

Description	Metal	Units	Tooth List
		1	
Standard Denture Teeth		1	
Print Digital Model		1	
Snowrock Partial Upper Complete - Traditional		1	

SEARCH CASE HISTORY

When using the case history search function, you can search by date, patient name, or case status.

1. To search by date, enter the date range in to the **DATE RANGE** fields. Click **SEARCH CASES**
2. To search by patient name, enter all or part of the patient last name in the **LAST NAME** field. Click **SEARCH CASES**
3. You may also filter by **CASE STATUS**

CasesBillingUser Setup

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Sign Out | Change Password

Atlanta Based Systems Inc.

Manage Cases

Date Range

01/15/2026to07/15/2026

Last Name (Leave empty to exclude)

Search Cases

Show10entriesFilter by case statusAllSearch:

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed Shipped Invoiced		

VIEW BASIC INVOICE

1. Click on the patient name of the invoice you would like to view

CasesBillingUser Setup

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Sign Out | Change Password

Atlanta Based Systems Inc.

Manage Cases

Date Range01/15/2026to07/15/2026Last Name(Leave empty to exclude)

Search Cases

Filter by case statusAll

Show10entriesSearch:

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed Shipped Invoiced		

2. Click on the INVOICES tab

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Manage Cases

Date Range01/15/2026to07/15/2026Last Name(Leave empty to exclude)

Search Cases

Back to Search

Serviced by: Cornerstone DIRECT

InfoInvoicesFileNotesCancelRemakePrint Page

InvoicePayment Received: 05/08/26Invoice Date: 05/06/26

Description	Price	Anterior Price	Taxes	Total Price
Print Digital Model		0.00 @ \$0.00 ea.	0.00 %	
Snowrock Partial Upper Complete - Traditional		0.00 @ \$0.00 ea.	0.00 %	
Standard Denture Teeth		0.00 @ \$0.00 ea.	0.00 %	
Flexible Complete		0.00 @ \$0.00 ea.	0.00 %	
3-Unit Crowns		0.00 @ \$0.00 ea.	0.00 %	
Processing and Handling		0.00 @ \$0.00 ea.	0.00 %	
Subtotal:				
Net Total:				
Taxes Total:				
Total:				
Balance Due:				

3. To print the page, click the **PRINT PAGE** tab. If you would like a more detailed invoice, see the **BILLING** section.

CasesBillingUser Setup

Theresa Colucci rd

Atlanta Based Systems Inc.

Manage Cases

Date Range01/15/2026to07/15/2026Last Name(Leave empty to exclude)

Search Cases

Back to Search

Served by: Cornerstone DIRECT

InfoInvoicesFileNotesCancelRemakePrint Page

Case Type	Order Date	Case Status	Ship Date	Case Pan Number	Delivery Date	Case Carrier	Tracking Number
New	05/05/26	Completed	05/06/26	COMB012	05/07/26	UPS Ground 1 Day	

Services

Description	Metal	Units	Tooth List
		1	
Standard Denture Teeth		1	
Print Digital Model		1	
Snowrock Partial Upper Complete - Traditional		1	

UPLOAD FILES/IMAGES TO A CASE

1. Click on the patient name of the case you would like to add pictures to.

CasesBillingUser Setup

IT Sign Out | Change Password

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Manage Cases

Date Range01/15/2026to07/15/2026Last Name(Leave empty to exclude)

Search Cases

Show 10 entriesFilter by case status All

Search:

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed Shipped Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed Shipped Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed Shipped Invoiced		

2. Click the **FILE** tab

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Manage Cases

Date Range: 01/15/2026 to 07/15/2026 Last Name(Leave empty to exclude):

Search Cases

2 **Back to Search**

3

Serviced by: Cornerstone DIRECT

Info **Invoices** **File** **Notes** **Cancel** **Remake** **Print Page**

Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
Drag files here.		

Add Files **Start Upload** 0% 0 kb

View Files **List of Uploaded Files**

3. Click the **ADD FILES** button or drag the files to the white file area.

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Manage Cases

Date Range: 01/15/2026 to 07/15/2026 Last Name(Leave empty to exclude):

Search Cases

2 **Back to Search**

3

Serviced by: Cornerstone DIRECT

Info **Invoices** **File** **Notes** **Cancel** **Remake** **Print Page**

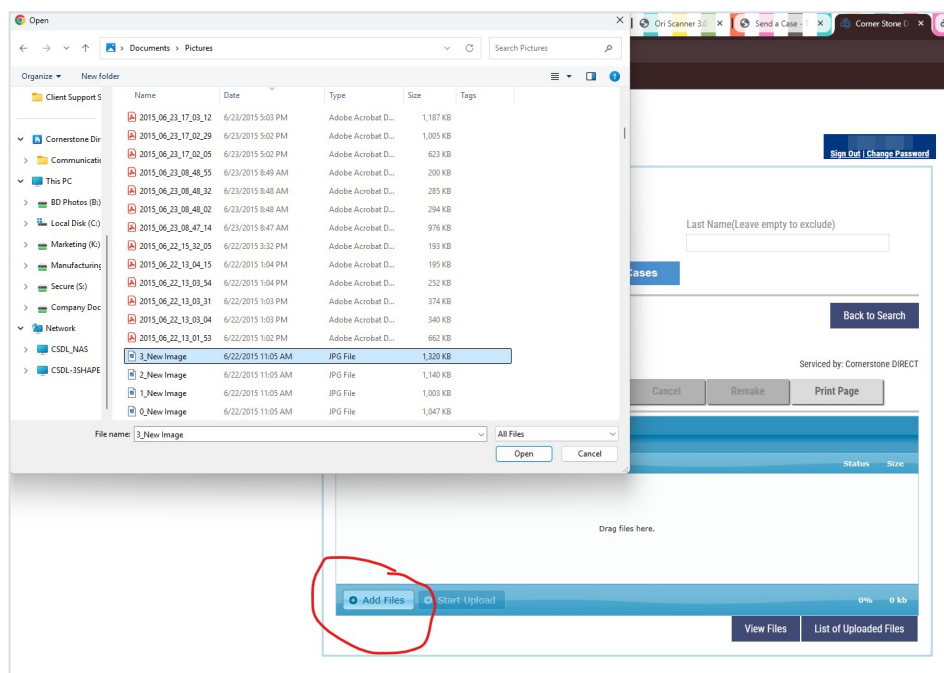
Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
Drag files here.		

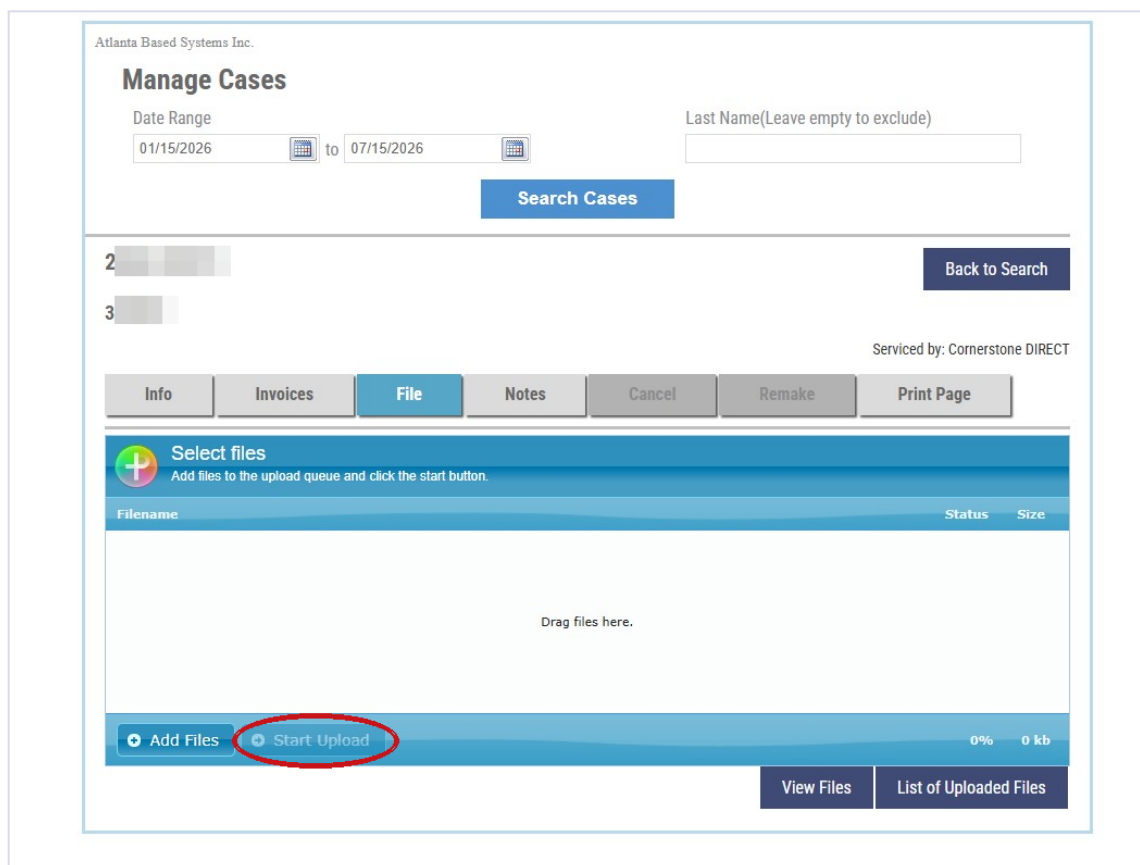
Add Files **Start Upload** 0% 0 kb

View Files **List of Uploaded Files**

4. Locate the file on your computer. Click **OPEN** .



5. Click **START UPLOAD** .



6. Once the file is uploaded, the status will read 100% and a check mark will appear at the far right-hand side.

CasesBillingUser Setup

Sign Out | Change Password

Atlanta Based Systems Inc.

Manage Cases

Date Range

01/15/2026to07/15/2026

Last Name(Leave empty to exclude)

Search Cases

Back to Search

Served by: Cornerstone DIRECT

InfoInvoicesFileNotesCancelRemakePrint Page

Select files

Add files to the upload queue and click the start button.

Filename	Status	Size
	100%	79 KB

Add Files

Start Upload

100%79 KB

View Files

List of Uploaded Files

BILLING

To access billing, login to your account and click on the **BILLING** tab. From this tab you will be able to view your account balance, view and download invoices and statements and make a payment.

Atlanta Based Systems Inc.

Manage Cases

Date Range: 01/15/2026 to 07/15/2026

Last Name(Leave empty to exclude)

Search Cases

Filter by case status: All

Show 10 entries

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed ✓ Shipped ✓ Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed ✓ Shipped ✓ Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed ✓ Shipped ✓ Invoiced		

VIEW ACCOUNT BALANCE

1. When you click on the **BILLING** tab, you will automatically be taken to the **ACCOUNT BALANCE** screen. This screen shows the total invoices and payments month to date as well as the total balance on the account.

Billing

Account Balance **View Invoices** **View Statements** **Pay My Bill**

Current Period	Invoices	Total Payments	Total Balance	Current Period Balance
07/01/26 to 07/31/26				

VIEW DETAILED INVOICES

1. To view and download invoices, click on **VIEW INVOICES**.

The screenshot shows the top navigation bar with 'Cases', 'Billing', and 'User Setup' tabs. On the right, there are links for 'Sign Out' and 'Change Password'. Below the navigation bar, the 'Billing' section is active, showing links for 'Account Balance', 'View Invoices' (circled in red), 'View Statements', and 'Pay My Bill'. A table below these links shows the 'Current Period' as '07/01/26 to 07/31/26' with columns for 'Invoices', 'Total Payments', 'Total Balance', and 'Current Period Balance'.

2. Invoices are searchable by date, patient name, case number and invoice status. To search by Date, input your start date and end date and click **SEARCH**. To view, print or download a specific invoice, click on the **PDF SYMBOL** next to the invoice you wish to view. A new window will open with your invoice.

The screenshot shows the 'Search Invoices' section. The search criteria are circled in red: 'Start date' is '03/15/2026' and 'End date' is '07/15/2026'. A 'Search' button is next to the end date. Below the search criteria, there is a 'Filter by invoice status' dropdown set to 'All'. A table of search results is shown with columns: Case, Date, Doctor, Patient, Status, Type, Total, Bal Due, Payment Received, and Invoice PDF. The table lists several invoices from 'Cornerstone DIRECT' with dates ranging from 07/10/2026 to 07/14/2026, all with a status of 'Unpaid' and type of 'Invoice(M)'. Each row has a PDF icon in the 'Invoice PDF' column.

The screenshot shows the 'Manage Cases' section. It has a 'Date Range' filter set to '01/15/2026' to '07/15/2026' and a 'Search Cases' button. Below the search bar, there is a 'Back to Search' button. The 'Invoices' tab is selected, showing a detailed invoice for a patient. The invoice includes a table with columns: Description, Price, Anterior Price, Taxes, and Total Price. The items listed are: Print Digital Model, Snowrock Partial Upper Complete - Traditional, Standard Denture Teeth, Flexible Complete, 3-Unit Crowns, and Processing and Handling. The 'Price' column shows '0.00 @ \$0.00 ea.' for each item. The 'Taxes' column shows '0.00 %'. The 'Total Price' column shows '0.00'. Below the table, there is a 'Subtotal' of '0.00', a 'Net Total' of '0.00', a 'Taxes Total' of '0.00', and a 'Total' of '0.00'. The 'Balance Due' is also '0.00'. The 'Payment Received' is '05/06/26' and the 'Invoice Date' is '05/06/26'.

VIEW STATEMENTS

- 1. To view and download statements, click on **VIEW STATEMENTS** .
- 2. Statements are arranged by date, newest to oldest. To view, print or download a statement, click on the **PDF SYMBOL** next to the statement you wish to view. A new window will open with your statement.

CasesBillingUser Setup

Sign Out | Change Password

BillingAccount BalanceView InvoicesView StatementsPay My Bill

Statement Date	Statement PDF
06/30/2026	
05/31/2026	
04/30/2026	
03/31/2026	
02/28/2026	
01/31/2026	
12/31/2025	
11/30/2025	
10/31/2025	
09/30/2025	
08/31/2025	
07/31/2025	

MAKE A PAYMENT

1. To make a payment on your account, click **PAY MY BILL** .

CasesBillingUser Setup

Sign Out | Change Password

Billing

Account BalanceView InvoicesView StatementsPay My Bill

Current Period	Invoices	Total Payments	Total Balance	Current Period Balance
07/01/26 to 07/31/26				

2. Choose to pay by **CREDIT CARD** or **ACH** . You then have the option to pay your balance in full, pay by selected invoice, pay your statement balance or pay a specific amount. Select the option you would like and click **CONTINUE** .

*Please note: credit card payments may incur a surcharge of up to 3%. To avoid this fee, you may choose to pay via ACH. To add ACH details to your account, contact The Dental Lab at 215.293.9760 ext. 103.

Billing Account Balance View Invoices View Statements Pay My Bill

Make Payments

☒ Pay by Credit Card
☐ Pay by ACH

☒ Pay in Full
☐ Pay by Selected Invoice
☐ Pay Statement Balance
☐ Pay Specified Amount :

Payment Amount:

Continue

Select All Clear All

Pay	Case	Date	Doctor	Patient	Status	Type	Total	Bal Due	Payment Received	Invoice PDF
☐		07/14/2026	Cornerstone DIRECT		Unpaid	Invoice				
☐		07/13/2026	Cornerstone DIRECT		Unpaid	Invoice(M)				
☐		07/13/2026	Cornerstone DIRECT		Unpaid	Invoice(M)				
☐		07/13/2026	Cornerstone DIRECT		Unpaid	Invoice(M)				
☐		07/10/2026	Cornerstone DIRECT		Unpaid	Invoice(M)				

3. If you have a credit card on file with us, you can choose **EXISTING CARD** and select the card from the pull down menu and click **SUBMIT** .

Billing Account Balance View Invoices View Statements Pay My Bill

Make Payments

☒ Pay by Credit Card
☐ Pay by ACH

Security Code:

☒ Existing Card ☐ New Card

Select Credit Card:

Select Card

Payment Amount:

Back **Submit**

4. If you do not have a credit card on file with us, or wish to use another card, select **NEW CARD** . Fill out the information and click **SUBMIT** . If you wish to save the new card to your account, click **SAVE CREDIT CARD** .

Billing [Account Balance](#) [View Invoices](#) [View Statements](#) [Pay My Bill](#)

Make Payments

☒ Pay by Credit Card
☐ Pay by ACH

☐ Existing Card ☒ New Card

New Card

[Save Credit Card](#)

Credit Card Number:

Expiration Date:

Security Code:

First Name: Last Name:

Address 1:

City: State:

Zip Code: Country:

[Back](#) [Submit](#)

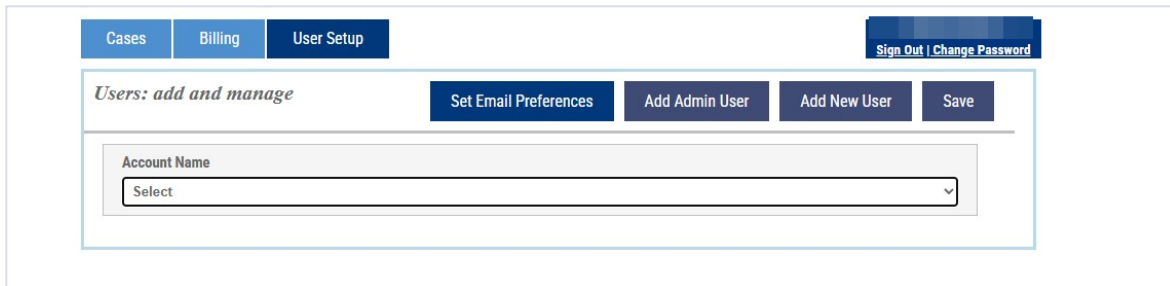
Payment Amount:

Credit card payments may incur a surcharge of up to 3%. To avoid this fee, you may choose to pay via ACH. If you already have an ACH account on file with us, proceed and enter your payment. If not, please contact The Dental Lab at 215-293-9760 ext. 103 to provide your ACH details, which can be saved for future payments through the portal.

5. After you click **SUBMIT** , you will receive an email with a receipt for payment.

USER SET-UP

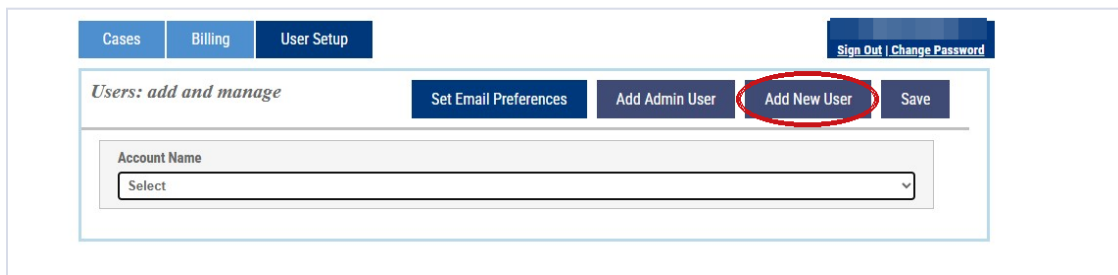
To access User Set Up, login to your account and click on the **USER SETUP** tab. From this tab you can add, deactivate, and manage the users for the Web Service. Only Admin Users are able to access this tab.



The screenshot shows the 'User Setup' tab selected in the top navigation bar. Below the navigation bar, there are buttons for 'Set Email Preferences', 'Add Admin User', 'Add New User', and 'Save'. The 'Add New User' button is highlighted with a red circle. Below these buttons is a dropdown menu labeled 'Account Name' with the text 'Select' inside it. In the top right corner, there are links for 'Sign Out' and 'Change Password'.

ADD NEW USER

1. There are two types of users for the Doctor Portal: Admin User and Standard User. The Admin User can add other users and has access to all areas of Web Service. The Admin User can also dictate the level of access granted to Standard Users. To add a Standard User, click **ADD NEW USER**.



This screenshot is identical to the one above, but the 'Add New User' button is circled in red to emphasize it. The 'Account Name' dropdown menu is still set to 'Select'.

2. Fill out User Information. Each user must have their own email address. Their email address will serve as their Username. You will also assign the user their password on this screen. Once the user has logged in for the first time, they may change their password.

The screenshot shows the 'User Setup' page with tabs for 'Cases', 'Billing', and 'User Setup'. The 'User Setup' tab is active. At the top right, there are links for 'Sign Out' and 'Change Password'. Below the tabs, there's a section titled 'Users: add and manage' with buttons for 'Set Email Preferences', 'Add Admin User', 'Add New User', and 'Save'. A dropdown menu for 'Existing Users - select to edit' is visible. The 'User Information' section is highlighted with a red circle. It contains fields for 'Salutation', 'First Name', 'Last Name', 'Email', and 'Password'. The 'Account Status' is set to '(Active)'. Below the fields, there's a password requirement message: 'The Password must have 8 to 16 characters and must have at least one letter, one special character and one number.' and a list of 'Valid Characters'. The 'Functions Allowed For This User:' section has checkboxes for 'Balances View', 'Invoices View', 'Cases View', 'Payment Processing', 'Images View', and 'Statements View', all of which are checked. A dropdown menu for 'Which dentist's cases will this user manage?' is set to 'Cornerstone DIRECT'.

3. Fill out Functions Allowed For This User. Click the boxes of the areas you would like the user to be able to access. If there are multiple doctors associated with one account, select the doctor for which the user will be managing cases. If there is only one doctor associated with the account, it will default to the doctor's name or practice name. Once complete, click **SAVE**.

This screenshot is identical to the one above, showing the 'User Setup' page. The 'Functions Allowed For This User:' section is now highlighted with a red circle. The checkboxes for 'Balances View', 'Invoices View', 'Cases View', 'Payment Processing', 'Images View', and 'Statements View' are all checked. The 'Which dentist's cases will this user manage?' dropdown is still set to 'Cornerstone DIRECT'.

4. To add an Admin User, click **ADD ADMIN USER** . Admin Users will have access to all areas of the online portal. Fill out User Information. Each user must have their own email address. Their email address will serve as their Username. You will also assign the user their password on this screen. Once the user has logged in for the first time, they may change their password. Once complete, click **SAVE** .

The screenshot shows the 'Users: add and manage' section of a web application. At the top, there are tabs for 'Cases', 'Billing', and 'User Setup'. On the right, there are links for 'Sign Out' and 'Change Password'. Below the tabs, there are four buttons: 'Set Email Preferences', 'Add Admin User' (circled in red), 'Add New User', and 'Save'. Below these buttons is a form with a label 'Account Name' and a dropdown menu with the text 'Select'.

DEACTIVATE A USER

1. To deactivate a user, select the user you would like to deactivate from the Existing Users menu.

The screenshot shows the 'Users: add and manage' section of a web application. At the top, there are tabs for 'Cases', 'Billing', and 'User Setup'. On the right, there are links for 'Sign Out' and 'Change Password'. Below the tabs, there are four buttons: 'Set Email Preferences', 'Add Admin User', 'Add New User', and 'Save'. Below these buttons is a form with a label 'Existing Users - select to edit' and a dropdown menu. The dropdown menu is circled in red. Below the dropdown menu is a section titled 'User Information' with fields for 'Salutation', 'First Name', 'Email', 'Account Status' (set to 'Active'), 'Last Name', and 'Password'. Below the 'User Information' section is a section titled 'Functions Allowed For This User:' with checkboxes for 'Balances View', 'Invoices View', 'Cases View', 'Payment Processing', 'Images View', and 'Statements View'. Below this section is a dropdown menu labeled 'Which dentist's cases will this user manage?' with the text 'Cornerstone DIRECT'.

2. Uncheck the Account Status box so that the status reads Inactive. Once complete, click **SAVE** .

Existing Users - select to edit

User Information

Salutation: Account Status: **(Active)**

First Name: Last Name:

Email: Password:

The Password must have 8 to 16 characters and must have at least one letter, one special character and one number.

Valid Characters:
123456789
!@#\$%^&*()=
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

Functions Allowed For This User:

☒ Balances View ☒ Invoices View ☒ Cases View ☒ Payment Processing ☒ Images View ☒ Statements View

Which dentist's cases will this user manage?

Cornerstone DIRECT

CHANGE PASSWORD

1. To change your password, click on **CHANGE PASSWORD** .

Manage Cases

Date Range: 01/15/2026 to 07/15/2026 Last Name (Leave empty to exclude)

Search Cases

Filter by case status: All

Patient	Doctor	Order	Status	Carrier	Tracking Number
	Cornerstone DIRECT,	05/05/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground 1 Day	
	Cornerstone DIRECT,	05/05/26	Completed ☒ Shipped ☒ Invoiced	UPS Next Day Air	
	Cornerstone DIRECT,	07/07/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground	
	Cornerstone DIRECT,	06/23/26	Completed ☒ Shipped ☒ Invoiced	UPS Ground	
	Cornerstone DIRECT,	03/17/26	Completed ☒ Shipped ☒ Invoiced		

2. Enter your old password, enter your newly created password and confirm your new password under confirm password. Once complete, click **SAVE** .

Change Password

Old Password:

New Password:

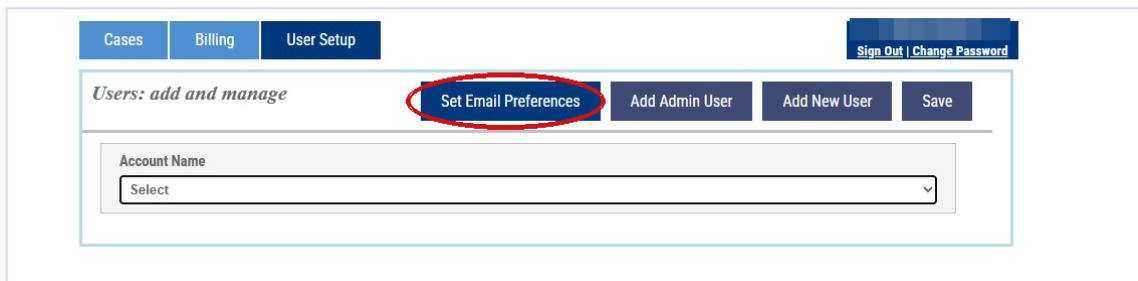
Confirm Password:

The Password must have 8 to 16 characters and must have at least one letter, one special character and one number.

Valid Characters:
123456789
!@#\$%^&*()=
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

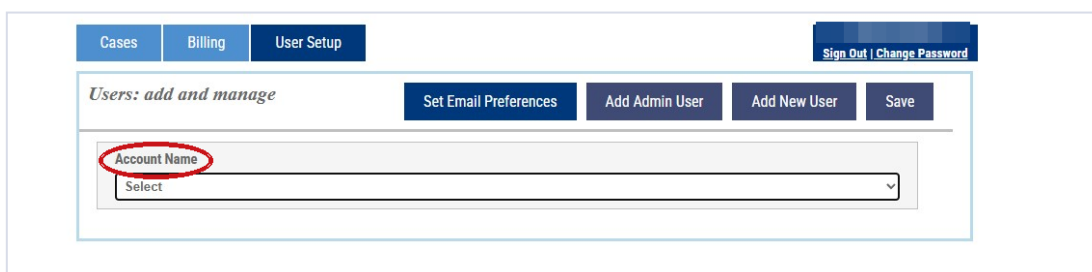
SET EMAIL PREFERENCES

1. To change email notification preference, click on **SET EMAIL PREFERENCES** .



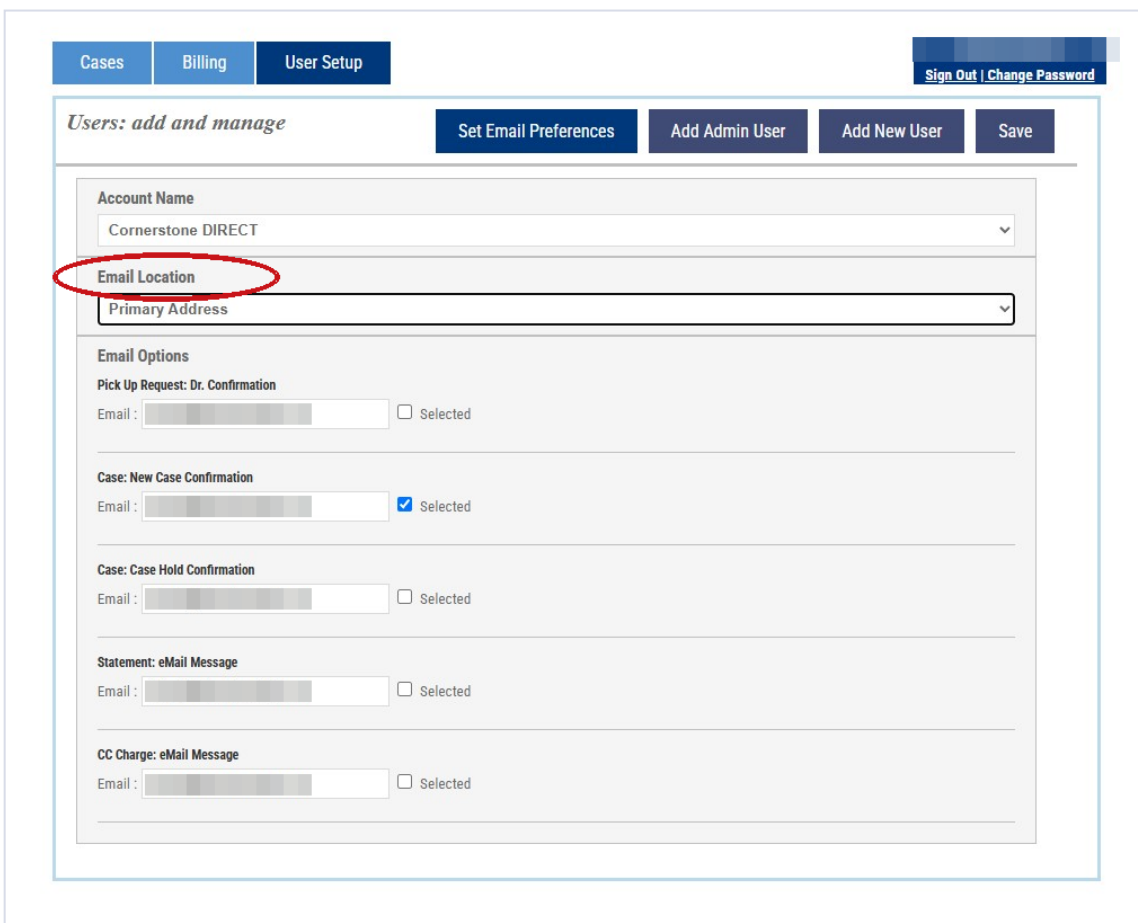
This screenshot shows the 'Users: add and manage' interface. At the top, there are tabs for 'Cases', 'Billing', and 'User Setup'. In the 'User Setup' tab, there is a 'Sign Out | Change Password' link. Below the tabs, there is a header 'Users: add and manage' and a row of buttons: 'Set Email Preferences', 'Add Admin User', 'Add New User', and 'Save'. The 'Set Email Preferences' button is circled in red. Below this row, there is a form with a label 'Account Name' and a dropdown menu currently showing 'Select'.

2. Select the account for which you wish to change email notification preferences.



This screenshot shows the same 'Users: add and manage' interface. The 'Set Email Preferences' button is no longer highlighted. Instead, the 'Account Name' dropdown menu is circled in red, indicating the next step in the process.

3. Select your practice location.



This screenshot shows the 'Email Options' section of the 'Set Email Preferences' form. The 'Account Name' dropdown is now set to 'Cornerstone DIRECT'. Below it, the 'Email Location' dropdown is circled in red and set to 'Primary Address'. The 'Email Options' section contains several checkboxes, each with an email address field and a 'Selected' checkbox. The 'Case: New Case Confirmation' checkbox is checked, while the others are not.

Option	Email Address	Selected
Pick Up Request: Dr. Confirmation	[Redacted]	☐
Case: New Case Confirmation	[Redacted]	☒
Case: Case Hold Confirmation	[Redacted]	☐
Statement: eMail Message	[Redacted]	☐
CC Charge: eMail Message	[Redacted]	☐

4. Check the **SELECTED** box next to each notification email you would like to receive (new case confirmations, case holds, pick up requests, statements, and CC charge messages). Once completed, click **SAVE** .

The screenshot displays a web application interface for managing users. At the top, there are tabs for 'Cases', 'Billing', and 'User Setup', with 'User Setup' being the active tab. To the right of these tabs are links for 'Sign Out' and 'Change Password'. Below the tabs, the main heading is 'Users: add and manage'. To the right of this heading are four buttons: 'Set Email Preferences', 'Add Admin User', 'Add New User', and 'Save'. The 'Set Email Preferences' button is highlighted. The main content area is a form for configuring email notifications. It includes a dropdown for 'Account Name' (currently set to 'Cornerstone DIRECT') and another dropdown for 'Email Location' (currently set to 'Primary Address'). Below these are several sections for selecting email notifications: 'Email Options' with a 'Pick Up Request: Dr. Confirmation' section, 'Case: New Case Confirmation', 'Case: Case Hold Confirmation', 'Statement: eMail Message', and 'CC Charge: eMail Message'. Each section has an 'Email' field and a 'Selected' checkbox. The 'Case: New Case Confirmation' checkbox is checked and circled in red. The 'Save' button is located at the bottom right of the form.

Account Name
Cornerstone DIRECT

Email Location
Primary Address

Email Options

Pick Up Request: Dr. Confirmation
Email : ☐ Selected

Case: New Case Confirmation
Email : ☒ Selected

Case: Case Hold Confirmation
Email : ☐ Selected

Statement: eMail Message
Email : ☐ Selected

CC Charge: eMail Message
Email : ☐ Selected



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