Specialty
APPLIANCES™

Welcome Back

Login using email or username and password

Email or username

Password

LOGIN

SmileSync User Guide

Specialty
APPLIANCES™

TABLE OF CONTENTS

Navigate to the portal login page and enter your credentials. You can use your email or portal username.

After entering your credentials, you can click "Keep me logged in" . This will keep you logged into the portal and you will not need to re-enter your credentials when you come back to login; however, for security measures after a certain amount of time you will need to re-enter your login credentials.

If you enter an incorrect combination of login credentials, you'll receive an error message. You can retry or click "Forgot password".
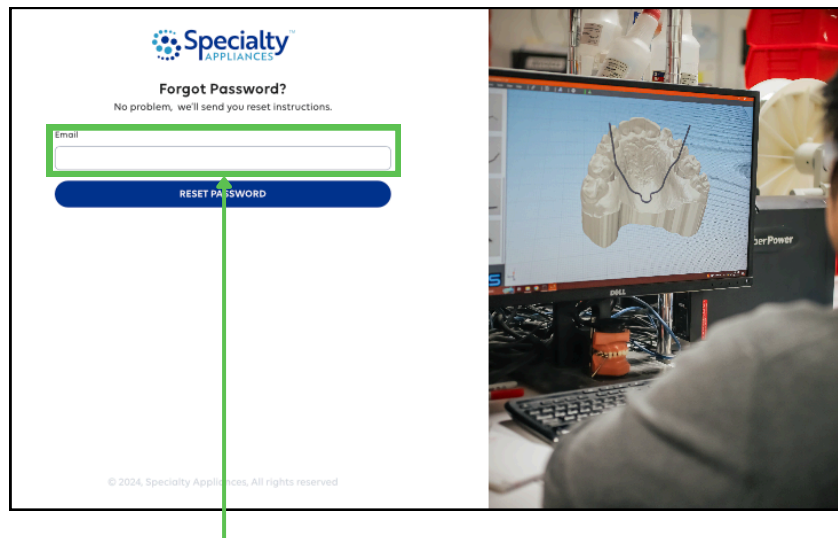

When you click on "Forgot password" on the login screen, you'll be brought to the forgot password page. You must enter your email associated to your account to proceed with resetting your password.

After you enter your email associated to your portal account, you'll receive an email with instructions to reset your password.
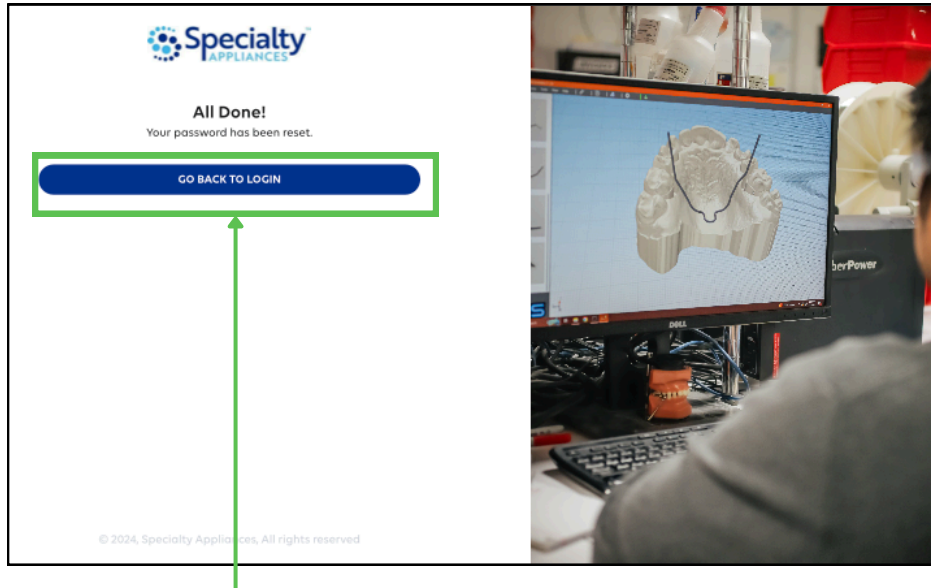
1. LOGIN AND CHANGE PASSWORD
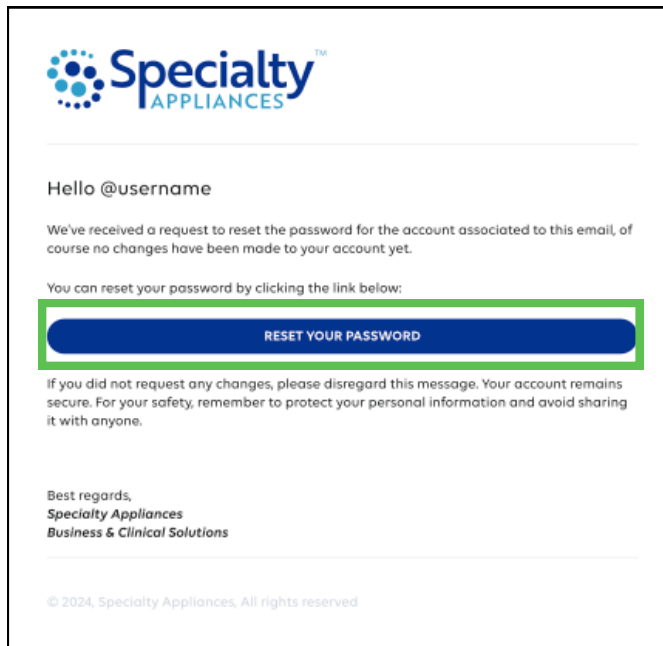
When you receive the email, click on "RESET YOUR PASSWORD"
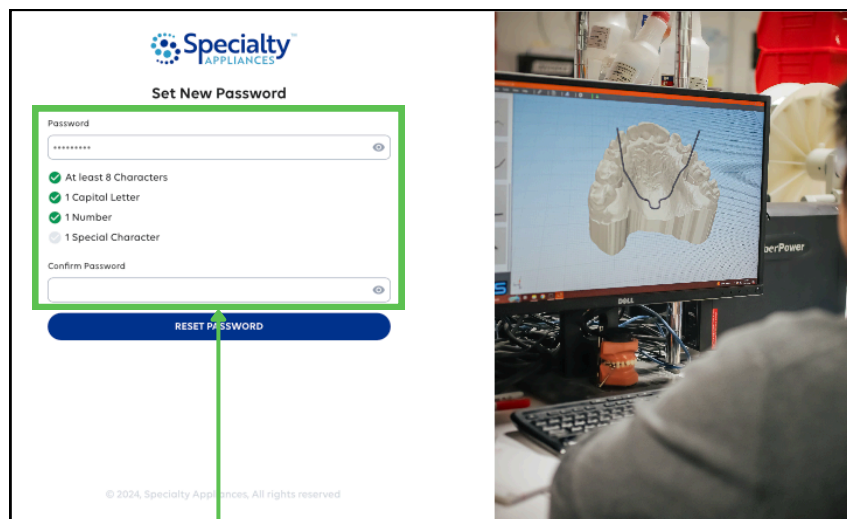
After clicking the link in the email, you'll be brought to the Set New Password page. Here, you can enter a new password that adheres to the password complexity requirements. You'll be required to re-enter / confirm your new password to successfully reset.

Once you successfully enter and confirm a new password, you'll see a success message. Click on the "GO BACK TO LOGIN" button to login with your new password.
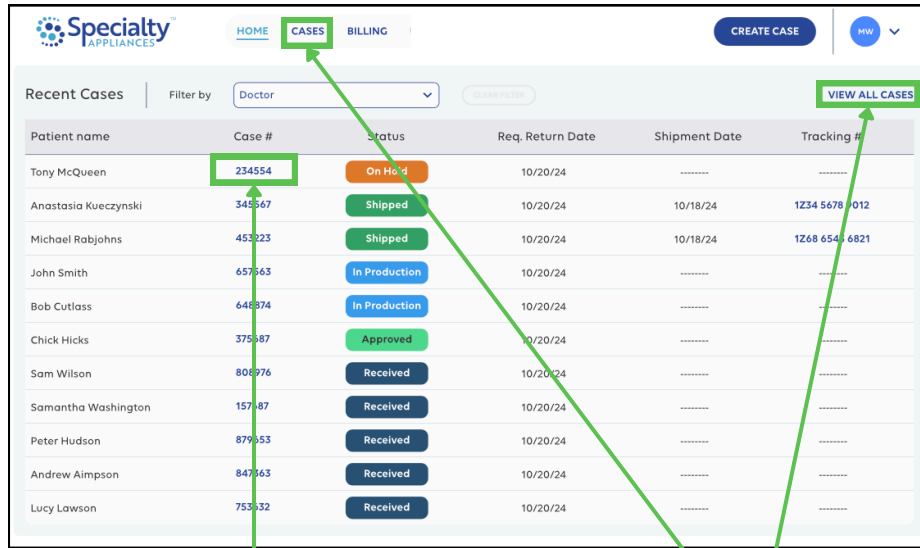
When you login to the portal, you'll be brought to the HOME page. The key aspect of this page is displaying the most recent cases.

The Home Page will showcase your most recent cases, based on when the case was created. You'll see most recent cases first that are then ordered based on STATUS.

To view an individual case, click on the Case #.

As the Home Page only shows the most recent cases, to view all cases click on "VIEW ALL CASES" or "CASES" in the main navigation

Select CREATE CASE in the upper right hand of the screen.

You can click "DISCARD CASE" at any point. You will not be able to click "SUBMIT CASE" until you complete all steps.

The first step to create a case is filling out all of the patient details. Anything required will have a red asterisk next to the field name.

On any step, if there's additional steps then you proceed by clicking "NEXT".

The second step to create a case is to select the applicable arch for the appliance(s). You can choose UPPER or LOWER or BOTH.

After you select the arch(s), choose the appliance. Appliances are organized in groups.

Each appliance will have a representative diagram. For more information on the appliances, visit specialtyappliances.com.

You must choose a configuration. If you'd like the Specialty Appliances standard, select "DEFAULT CONFIGURATION." Otherwise, you can use one of your "SAVED CONFIGURATIONS" or a "NEW CONFIGURATION".

Regardless of the configuration, you're able to select the appropriate options and accessories available for the selected appliance.

Appliance configuration is handled within groupings (e.g., Accessories, Clasping Options, etc.).

When selecting a certain option within a grouping, there can also be various teeth selectors to mark where the given option applies. It's important to select everything you'd like configured on the appliance.

The options you see are specific to and available for the selected Appliance and arch.

For digital cases, you can upload your STL file directly into the portal or select "Submit by Scanner."

For analog cases, select "Stone Model".

You also have the option to submit other documents, such as drawings; however, it's encouraged to include all details of your case within the configuration options / appliance details and STL file.

Case Creation

1 Doctor & Patient Information ⌄

2 Dental Arch Type ⌄

3 Product Category & Appliance ⌄

4 Appliance details / Upper - Hawley Standard ⌄

5 Appliance details / Lower - Aligners ⌄

6 Modal submission type ⌄

7 Return Date

Shipping Address

Address 1	Address 2	City	State	ZIP
123 Peachtree Street	123 Peachtree Street	Atlanta	GA	30303

Select a Req return date*

17/08/88 📅   ☐ Request express shipping ($85 fee) to receive appliance within 7 business days.

10 business days from today

NEXT

DISCARD CASE   SUBMIT CASE

After adding the model submission type, you must select a request return date for your case. You will see the earliest date available based on our current operating capacity, and can always choose a later date.

Should you need it sooner, you can request expedited shipping for an additional charge.

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This is the final step of the case submission process. You'll see a summary of the case and your authorization.

Links are surfaced throughout the summary to easily go back and view/edit case details.

You cannot submit your case until you check and agree to the terms and conditions.

⑤ Appliance details / Lower - Aligners ⌄

⑥ Modal submission type ⌄

⑦ Return Date ⌄

⑧ Authorization

Retainers - Aligners / Anastasia Kueczynski

Submitted on
10/10/24

Req. return date
10/20/24

Prescription details

Retainer

Edit RX ✏

Submitted by
Helen Bowman

Doctor name
Dr. McCarthy

Shipping address
132, My Street, Kingston, New York 12401.

Edit Information ✏

Prescription files

view files ✏

filename.patientname.doctorname.case#.stl   ⤢

filename.patientname.doctorname.case#.stl   ⤢

filename.patientname.doctorname.case#.stl   ⤢

Re-Upload Files ✏

By marking this checkbox I accept the terms and conditions and confirm that all information submitted is correct.
Please verify that all the information is correct.

Terms and Conditions 🗗

☐ I agree to the terms and conditions and that the information I sent is correct.

DISCARD CASE   SUBMIT CASE

Once you agree to the terms and conditions you'll have the ability to click "SUBMIT CASE".

Specialty APPLIANCES ™

A. CREATING A SAVED CONFIGURATION

Within the case creation module,

Regardless of the configuration, you're able to select the appropriate options and accessories available for the selected appliance.

B. MODIFYING A SAVED CONFIGURATION

Within the case creation module, select the Saved Configuration that you would like to modify

Case Creation

③ Product Category & Appliance / Upper

④ Appliance details / Upper - Cantilever Herbst Upper

Configuration
- ○ SPECIALTY APPLIANCE CONFIGURATION
- ◉ SAVED CONFIGURATIONS
  Saved Configurations
  [Test Configuration ⌄]
- ○ NEW CONFIGURATIONS

Does Patient Currently Have:
- ☑ BRACKETS
  - ◉ KEEP *
  - ○ REMOVE
- ☐ ATTACHMENTS
- ☐ BANDS
- ☐ ARCHWIRE

Once the configuration is selected, make changes to the template according to your preferences.
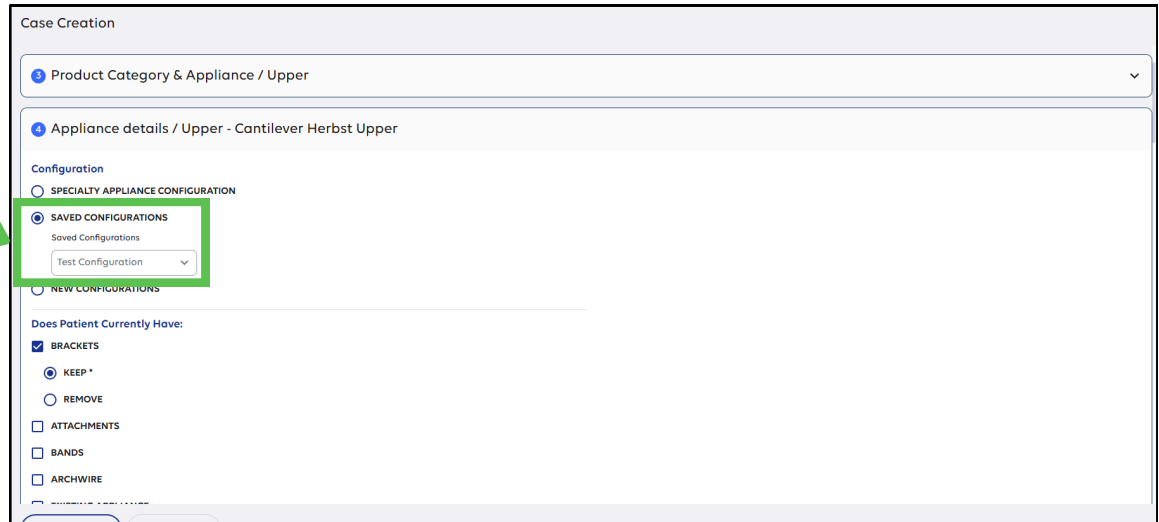
Once you have modified the Saved Configuration to your liking, scroll down to the bottom of the section and select "Update"

Case Creation

☑ .032 WIRE

Choose at least 1 teeth and placement

RIGHT		LEFT	
4/d	-NONE- ⌄	4/d	-NONE- ⌄
5/e	-NONE- ⌄	5/e	-NONE- ⌄
6	-NONE- ⌄	6	-NONE- ⌄
7	-NONE- ⌄	7	-NONE- ⌄

- ☐ .036 WIRE
- ☐ NO RESTS

Crown Options
- ☑ ADD VENT HOLES
- ☑ ADD DEBOND HOLES
  Size
  [Select Size ⌄]
- ☐ ADD VERTICAL SLITS

CLEAR FORM [UPDATE] [DELETE] [NEXT]

Specialty APPLIANCES™
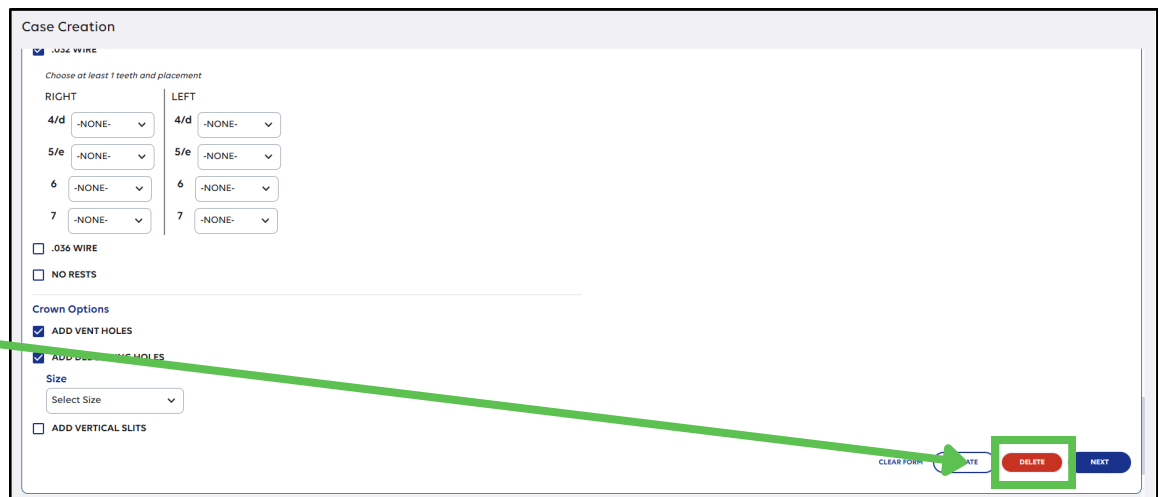
C. DELETING A SAVED CONFIGURATION

Within the case creation module, select the Saved Configuration that you would like to delete.

Case Creation

③ Product Category & Appliance / Upper

④ Appliance details / Upper - Cantilever Herbst Upper

Configuration
○ SPECIALTY APPLIANCE CONFIGURATION
◉ SAVED CONFIGURATIONS
   Saved Configurations
   [Test Configuration ⌄]
○ NEW CONFIGURATIONS

Does Patient Currently Have:
☑ BRACKETS
  ◉ KEEP *
  ○ REMOVE
☐ ATTACHMENTS
☐ BANDS
☐ ARCHWIRE

Scroll down to the bottom of the section. Then select "Delete". This will remove the saved configuration from your account.

Case Creation

☑ .032 WIRE

Choose at least 1 teeth and placement

RIGHT		LEFT	
4/d	-NONE-	4/d	-NONE-
5/e	-NONE-	5/e	-NONE-
6	-NONE-	6	-NONE-
7	-NONE-	7	-NONE-

☐ .036 WIRE
☐ NO RESTS

Crown Options
☑ ADD VENT HOLES
☑ ADD DEBONDING HOLES
  Size
  [Select Size ⌄]
☐ ADD VERTICAL SLITS

CLEAR FORM   ~ATE   **DELETE**   **NEXT**

Specialty APPLIANCES™

Specialty APPLIANCES

HOME   CASES   BILLING

CREATE CASE   MW ⌄

| Case List | Search by patient name or case number 🔍 | SEARCH | Filter by | All Status ⌄ | All Doctors ⌄ | CLEAR FILTERS |

Patient name ↑↓	Case # ↑↓	Status	Req. Return Date ↓↑	Shipment Date ↓↑	Tracking #
Tony McQueen	134520	On Hold	10/22/24	--------	--------
Anastasia Kueczynski	304892	Shipped	10/19/24	10/18/24	1Z90 5678 9012
Michael Rabjohns	912503	Shipped	10/20/24	10/18/24	1Z56 2533 1123
John Smith	125029	In Production	10/24/24	--------	--------
Bob Cutlass	582103	In Production	10/25/24	--------	--------
Chick Hicks	124905	In Production	10/26/24	--------	--------
Sam Wilson	903854	Approved	10/27/24	--------	--------
Samantha Washington	912053	Approved	10/27/24	--------	--------
Peter Hudson	349078	Recieved	10/26/24	--------	--------
Andrew Simpson	097834	Recieved	10/26/24	--------	--------
James Jameson	907813	Delivered	10/17/24	10/18/24	--------
Sally Highland	123098	Delivered	10/17/24	10/18/24	--------
Luke Kansas	634571	Delivered	10/16/24	10/18/24	--------
Mike Carlton	456078	Delivered	10/15/24	10/18/24	--------
Peter Parker	978546	Delivered	10/14/24	10/18/24	--------
Blake Fish	657132	Delivered	10/13/24	10/18/24	--------
Daniela Thompson	214465	Delivered	10/12/24	10/18/24	--------
Ophelia Young	123625	Delivered	10/11/24	10/18/24	--------
George Lopez	155463	Delivered	10/10/24	10/18/24	--------
Lucy Lawson	104017	Cancelled	10/20/24	10/18/24	--------

1 - 20 of 200   < >

To find a specific case, you can:
- **Search by patient name or case number in the search field**
- **Filter by an individual status or doctor**

The cases section serves as your entry point to view and access all cases.

Specialty APPLIANCES

Specialty APPLIANCES

HOME   CASES   BILLING

CREATE CASE   MW

Case List

Search by patient name or case number 🔍   SEARCH   Filter by   All Status ⌄   All Doctors ⌄   CLEAR FILTERS

Patient name ↑↓	Case # ↑↓	Status	Req. Return Date ↓↑	Shipment Date ↓↑	Tracking #
Tony McQueen	134520	On Hold	10/22/24	--------	--------
Anastasia Kueczynski	304892	Shipped	10/19/24	10/18/24	1Z90 5678 9012
Michael Rabjohns	912503	Shipped	10/20/24	10/18/24	1Z56 2533 1123
John Smith	125029	In Production	10/24/24	--------	--------
Bob Cutlass	582103	In Production	10/25/24	--------	--------
Chick Hicks	124905	In Production	10/26/24	--------	--------
Sam Wilson	903854	Approved	10/27/24	--------	--------
Samantha Washington	912053	Approved	10/27/24	--------	--------
Peter Hudson	349078	Recieved	10/26/24	--------	--------
Andrew Simpson	097834	Recieved	10/26/24	--------	--------
James Jameson	907813	Delivered	10/17/24	10/18/24	--------
Sally Highland	123098	Delivered	10/17/24	10/18/24	--------
Luke Kansas	634571	Delivered	10/16/24	10/18/24	--------
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Ophelia Young	123625	Delivered	10/11/24	10/18/24	--------
George Lopez	155463	Delivered	10/10/24	10/18/24	--------
Lucy Lawson	104017	Cancelled	10/20/24	10/18/24	--------

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If a case has been shipped, you'll also see and can click on the Tracking #.

The current status of each case will display in this column.

Specialty APPLIANCES

A. FINDING YOUR CASE

To find a specific case, you can:
- search by patient name or case number in the search field
- Filter by an individual status or doctor

Your entered search term will appear in the search field. You do not need to enter the full name to search.
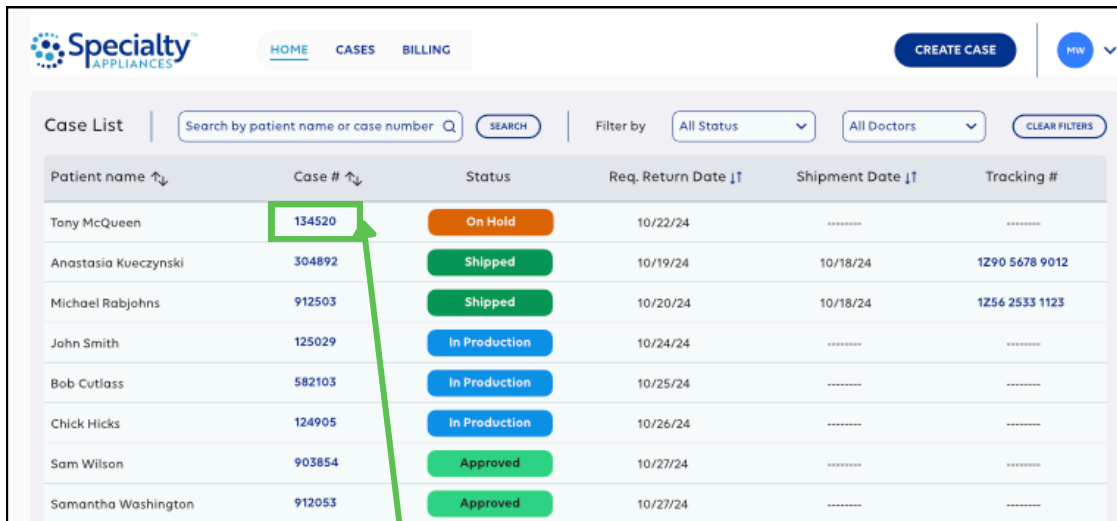
All cases that match your search will display in the cases table.

B. SEARCH RESULTS

If you enter a search that yields zero results, you'll see a zero results message. You can clear your search by hitting the "X" in the search field.

C. SELECT CASE TO VIEW DETAILS

To view the details of a case, click the Case #.
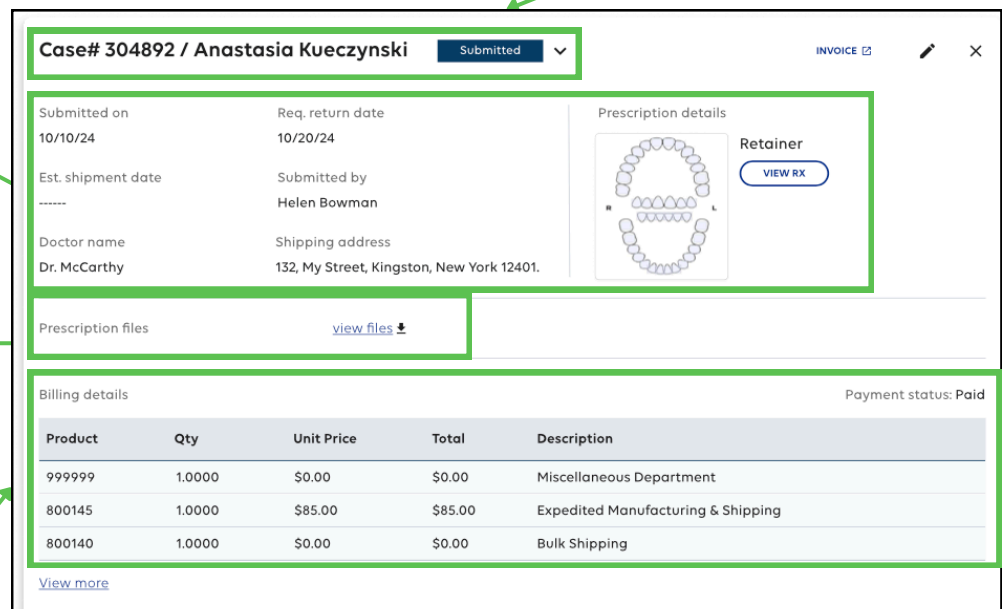
D. INVIDIVUAL CASE DETAILS

Here you'll see the case #, patient name, and current case status.

Here you'll see background information on the case and the prescription.

Here you can access all files (e.g., STL Scan) associated to the case.

Here you'll see all billing details, including the payment status in the top right of this section.

E. KEY ACTIONS

Case# 304892 / Anastasia Kueczynski — Submitted

Submitted on	Req. return date	Prescription details
10/10/24	10/20/24	Retainer
Est. shipment date	Submitted by	
------	Helen Bowman	
Doctor name	Shipping address	
Dr. McCarthy	132, My Street, Kingston, New York 12401.	

INVOICE ✎

VIEW RX

Click here to edit / make changes to the case.

Click here to view the invoice.

Click here to view the RX for the case.

Prescription files — view files ⬇

Billing details   Payment status: **Paid**

Product	Qty	Unit Price	Total	Description
999999	1.0000	$0.00		Miscellaneous Department
800145	1.0000	$85.00	$85.00	Expedited Manufacturing & Shipping
800140	1.0000	$0.00	$0.00	Bulk Shipping

View more

Click here to view all files (e.g., STL Scan) associated to the case.
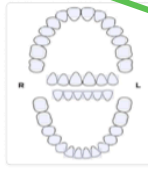
If there are more billing details than what's displayed by default, you'll see a View more link. Click here to view all billing details.

Case# 304892 / Anastasia Kueczynski — Shipped   Tracking # 1Z94 5678 9012   INVOICE ✕

Submitted on	Req. return date	Prescription details
10/10/24	10/20/24	Retainer
Est. shipment date	Submitted by	
------	Helen Bowman	
Doctor name	Shipping address	
Dr. McCarthy	132, My Street, Kingston, New York 12401.	

VIEW RX

Prescription files — view files ⬇

If the case has been shipped, you'll see the Tracking #. Click on the tracking number to view tracking / delivery status.

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G. EDIT CASE

Change the requested return date and/or shipping address. NOTE: this is only available up until a certain point in the case lifecycle.

Case# 304892 / Anastasia Kueczynski **Submitted**   INVOICE ✎ ✕

Submitted on
10/10/24

Est. shipment date

Doctor name
Dr. McCarthy

Req. return date
10/20/24

Submitted by
Helen Bowman

Shipping address
132, My Street, Kingston, New York...

Prescription details

Retainer
VIEW RX

Prescription files   view files ⬇
filename.patientname.doctorname.case#.stl ⬇ 🗑
filename.patientname.doctorname.case#.stl ⬇ 🗑
filename.patientname.doctorname.case#.stl ⬇ 🗑

Drag and drop your files here or
SELECT FILES
File extension: .stl, .pdf, .jpg
Max file size 50mb

Add files

Remove files

Billing details   Payment status: Paid

Product	Qty	Unit Price	Total	Description
999999	1.0000	$0.00	$0.00	Miscellaneous department
800145	1.0000	$85.00	$85.00	Expedited manufacturing & shipping
800140	1.0000	$0.00	$0.00	Bulk shipping

View more

✕ CANCEL CASE   ‹ DISCARD CHANGES   💾 SAVE CHANGES

CANCEL CASE: will cancel the case. This is only available up until a certain point in the case lifecycle.

DISCARD CHANGES: None of your changes to the case will be saved.

SAVE CHANGES: All of your changes to the case will be saved.

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7. BILLING

When you navigate to BILLING, you'll see all of your invoices.

For each invoice, you'll see the relevant information (e.g., Patient name, Case #, etc) ordered by most recent first.

You can narrow the results by filtering by a Doctor, which will only show invoices for that Doctor.

If you apply one or many filters, you can reset / clear by clicking "CLEAR FILTERS".

You can narrow the results by searching by Patient Name or Case #.

You can clear / reset a search by clicking the "X".

When you enter a search query, click enter or "SEARCH" to search against your invoices.
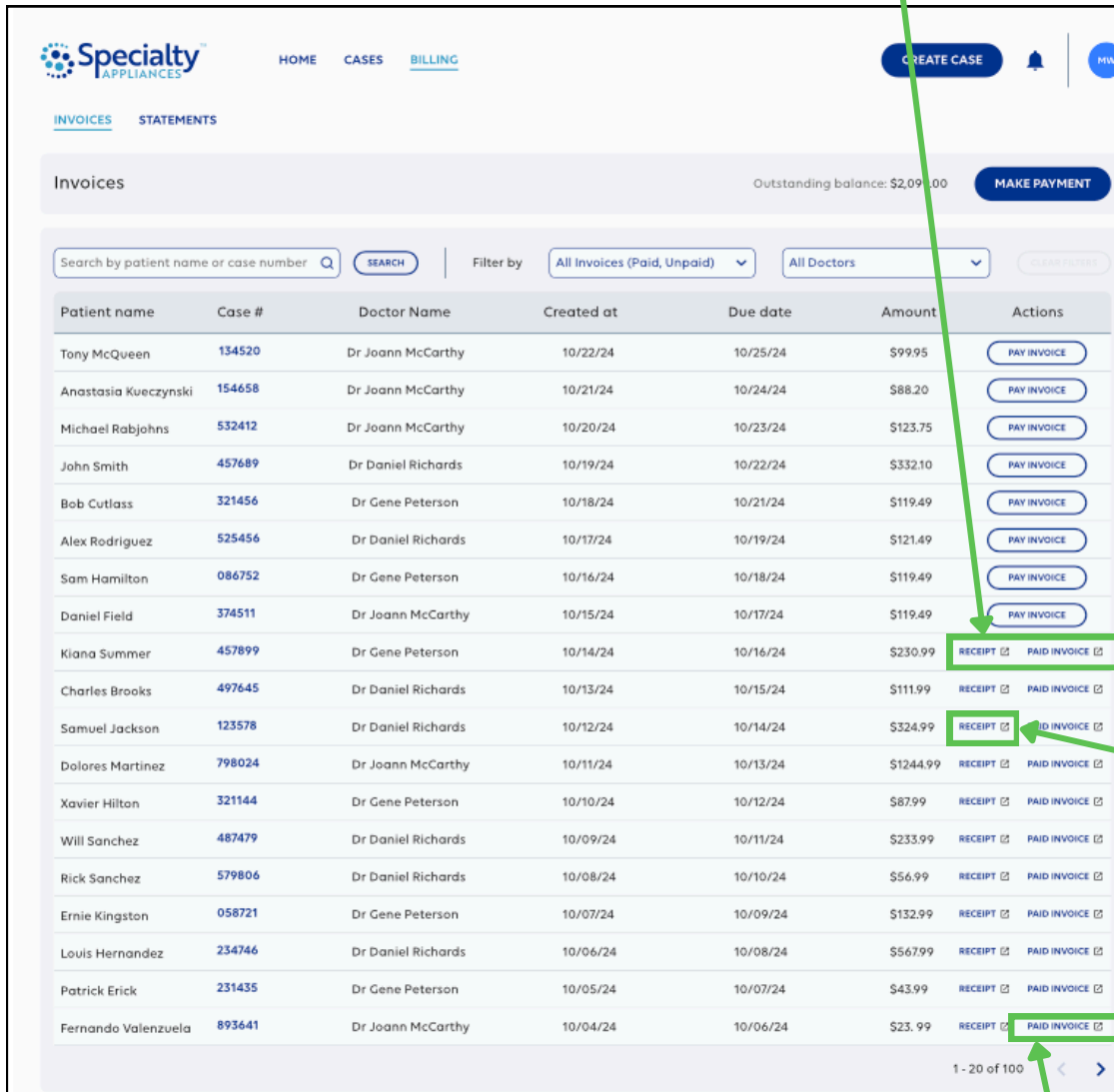
If you enter a search query that yields zero results, you'll see a notification and can clear your search and try again.

Any invoice that's been paid, instead of seeing "PAY INVOICE" you'll see a link for the "RECEIPT" and "PAID INVOICE".

To access a receipt, click on the "RECEIPT" link for the invoice of interest. Your receipt will open in a new tab and you'll be able to view, download, and/or print.

To view an already paid invoice, click on the "PAID INVOICE" link for the invoice of interest. Your invoice will open in a new tab and you'll be able to view, download, and/or print.

Your entire outstanding balance will be displayed here. This is a summation of the total balance of all unpaid invoices.

You can either pay many invoices at once or an individual invoice. To pay across many invoices at once, click "MAKE PAYMENT" here. You'll be brought to the payment page.

Any invoice that hasn't been paid will have a "PAY INVOICE" button. Click on this button to pay for that individual invoice. You'll be brought to the payment page.

In addition to viewing Invoices, you can view your Statements by clicking here.

All your statements will be organized per year.

For each statement, you'll see the period, statement balance, and a link to the statement. Clicking the "STATEMENT" link will open the corresponding statement in a new tab where you can view, download, and/or print.

To view statements for a given year, click on the corresponding year to expand all statements for that year.

Specialty APPLIANCES

HOME   CASES   **BILLING**

CREATE CASE   MW

INVOICES   STATEMENTS

Statements

2024

Period	Statement balance	Actions	Period	Statement balance	Actions
October	$300.00	STATEMENT	June	$300.00	STATEMENT
September	$300.00	STATEMENT	May	$300.00	STATEMENT
August	$300.00	STATEMENT	April	$300.00	STATEMENT
July	$300.00	STATEMENT	March	$300.00	STATEMENT
			February	$300.00	STATEMENT
			January	$300.00	STATEMENT

2023 ⌄

2022 ⌄

2021 ⌄

2020 ⌄

1 - 5 of 20   ‹ ›

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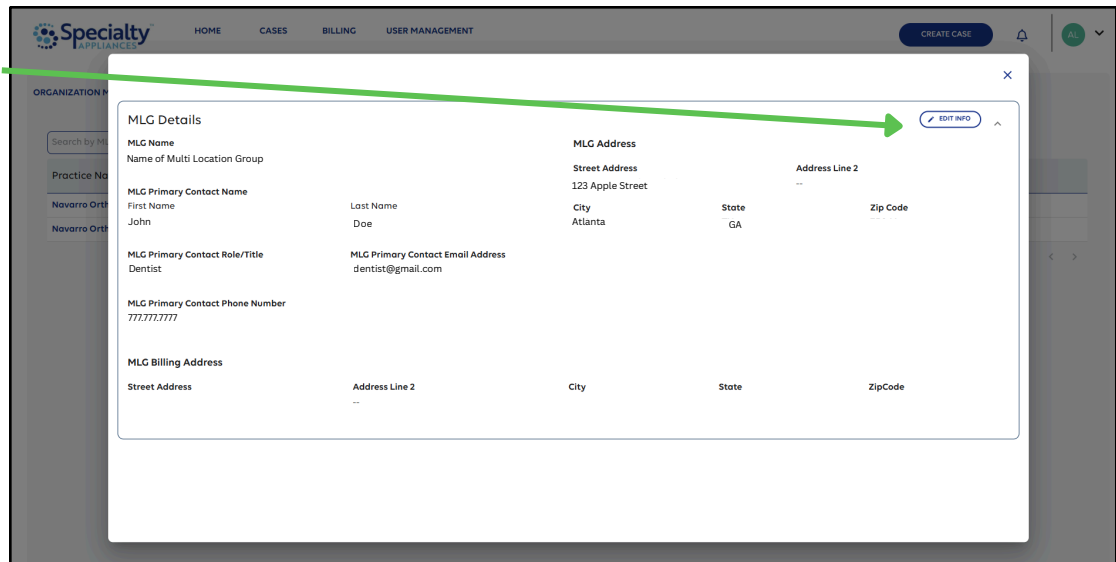
To view your organizational settings, click your profile icon and choose "Organization Settings."
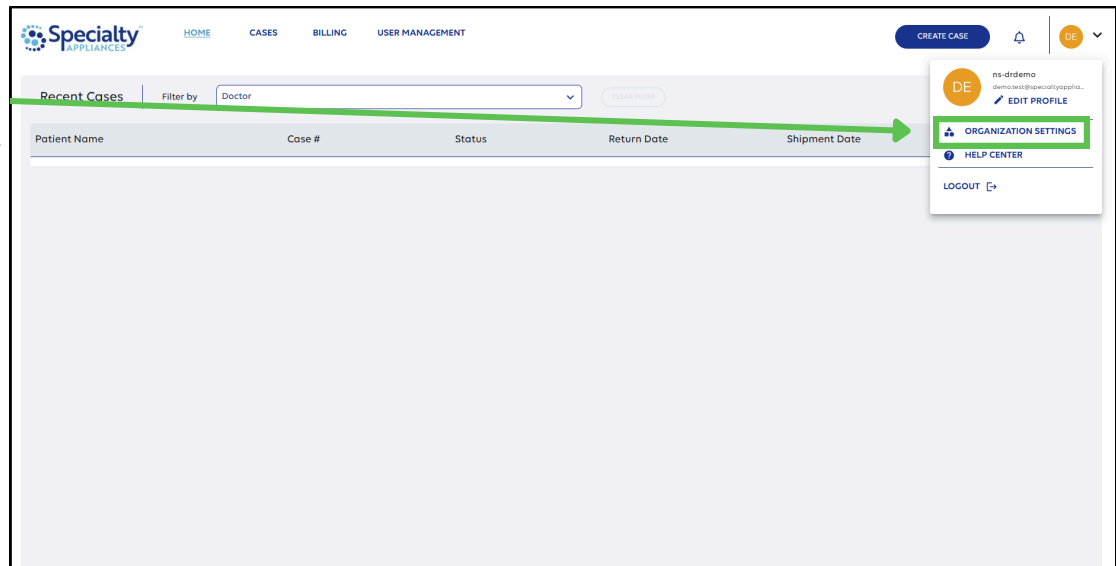
To edit your organizational settings, click "Edit Info".

To view, add, or modify users, click "User Management".

To add an additional user, click "+Add User".

Select the user role. This will determine the user's permissions.

Add the user's first name, last name, user name and email address.

Once added, the user will receive an email to set up their account.

For multi-location practices, select the practices the user can manage.

9. USER MANAGEMENT

Click "Roles and Permissions" to see the types of roles that you can assign to users.

If you are an independent practice, you will see each of the roles available to practices.

If you are the admin of a multi location group, you will see the practice roles as well as the multi location group roles.