

NDX Customer Portal

User Guide



About This Guide

This guide highlights the features of the **NDX Customer Portal**, a cloud-based platform powered by EasyRx.

Please note that additional EasyRx features designed to help practices organize and manage day-to-day operations are not covered in this guide.

To explore the full range of EasyRx tools available to support your practice-specific workflows, visit the EasyRx Support Center:

<https://support.easyrxortho.com/portal/en/home>

Logging Into Your Customer Portal

The NDX Customer Portal is a secure, cloud-based platform you can access anytime, from any device. For the best experience, we recommend using Google Chrome.

Step 1

Check your email for an invite to log in to the portal from NDXCustomerPortal@easyrx.com.
(Check your spam or junk folder.)

Step 2

Click the link in your email or go to (<https://ndx.easyrxortho.com/>) and enter your account email address.



One account. All your prescriptions.

A screenshot of the "Sign in to your account" form. It features a title "Sign in to your account" at the top. Below it is a label "Email" followed by a text input field containing the placeholder text "Email". At the bottom of the form is a blue button labeled "NEXT" and a link "Forgot your password?" below it.

Step 3

Enter the assigned password that you received in the email.



One account. All your prescriptions.

A screenshot of the "Sign in to your account" form. It features a title "Sign in to your account" at the top, followed by a subtitle "Signing in as tanya.greaves+doctor@nationaldentex.com." and a link "Not you?". Below this is a label "Password" followed by a text input field. At the bottom of the form is a blue button labeled "LOGIN" and a link "Forgot your password?" below it.

Portal Navigation – Dashboard

The portal dashboard appears upon logging in.

The dashboard can also be accessed by clicking Dashboard in the menu at the top-right.

Key Features

- View Cases in Production
- Respond to Clinical Notifications
- Monitor & Update Case Status
- Navigate to Billing Information

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Home Contact Support Messages NDX Demo Account Test

Dashboard Patients EasyRx 3D Templates Scripts Labs

CREATE RX

Favorite Prescriptions

EXPORT PRINT VIEW

All Submitted (EasyRx Default View) SAVE VIEW AS SET AS DEFAULT

Submitted Date	Last 90 Days	Office(All)	Doctor(All)	Tag(All)	Laboratory(All)	Received: All	Delivered: No	Search this queue			
ID	Patient	S	Tags	Dsc	Appt. Office	Doctor	Laboratory	Date Needed	Rec'd	Del'd	
9871855 RF	Evan Nightingale	CK	+		Commerce	Test Doctor	NDX Demo Account	7/29/25	N	N	view
9835705	Jane Doe	P	+		Commerce	Test Doctor	NDX Demo Account	7/28/25	N	N	view
* 9835666	Jane Doe	S	+		Commerce	Test Doctor	NDX Demo Account	7/28/25	N	N	view
9833669	Aryn PortalTest	S	+		Commerce	Test Doctor	NDX Demo Account	7/25/25	N	N	view
9792619	EasyRx Portal Test	S	+		Commerce	Test Doctor	NDX Demo Account	7/25/25	N	N	view
9786658	Aryn Test	P	+		Commerce	Test Doctor	NDX Demo Account	7/17/25	N	N	view
9489322	Lisa Shepard	S	+		Commerce	Test Doctor	NDX Demo Account	6/20/25	N	N	view

Show 10

Portal Navigation – Dashboard Views

Saved	View prescriptions you have created but have not submitted to the lab
Favorites	View orders you have marked as 'favorite'
All Submitted	View all orders you have submitted to the lab
Checked-in	View orders you have submitted, and the lab has started processing
Completed	View orders that have been completed
Shipped	View orders you have submitted and the lab has shipped to your office
Received	View orders the lab has completed and you have received
Digital	View orders you have submitted digitally via the portal
Physical	View submitted orders containing physical impressions, models, etc
Needed Soon	Filter by desired due date range
Appt. Date	Filter by desired patient appointment date range
Mark Rec/Del	Search for and mark cases as received or delivered
Clinical Notifications	View & respond to notifications and questions initiated from the lab
Messages	View practice messages, clinical notifications & event notifications

CREATE RX

Saved16

Favorites7

All Submitted11

Checked-in5

Completed0

Shipped2

Received0

Digital Submitted3

Physical Submitted4

Needed Soon1

Appointment Date3

Mark Cases Rec/Del11

Clinical Notifications
1 this week

Messages0

iTero — Recent Orders

Favorite Prescriptions

All Submitted (EasyRx Default View)

Submitted DateLast 90 Days

ID	Patient
9871855 RF	Evan Nightingale
9835705	Jane Doe
*9835666	Jane Doe
9833669	Aryn PortalTest
9792619	EasyRx Portal Test
9786658	Aryn Test
9489322	Lisa Shepard

Portal Navigation – Dashboard Layout & Functions

Column information can be re-sorted by clicking the column header labels.

- 1 The view drop down enables you to customize and save case queries
- 2 Case descriptor indicators appear after the ID number. RF = Case Refinement | RP = Case Repair | RM = Case Remake
- 3 Status codes indicate the current state of case fabrication. S=Submitted | CK=Checked In | C=Completed | P=Shipped | R=Received
- 4 The Tags column indicates and allows the addition of tags to orders
- 5 Case descriptor indicators appear after the ID number. RF = Case Refinement | RP = Case Repair | RM = Case Remake
- 6 The Received & Delivered columns indicate the current status of orders. These can also be clicked on to update order status

The screenshot displays the NDX National Dentex Labs portal dashboard. At the top, there is a navigation bar with links for Dashboard, Patients, EasyRx 3D, Templates, Scripts, and Labs. Below this, a green 'CREATE RX' button is visible on the left. The main section is titled 'Favorite Prescriptions' and features a dropdown menu set to 'All Submitted (EasyRx Default View)' with 'SAVE VIEW AS' and 'SET AS DEFAULT' buttons. A table of prescriptions is shown below, with columns for Submitted Date, Patient, Status, Tags, Doctor, Laboratory, Date Needed, and Received/Delivered status. Red boxes and numbers 1 through 6 highlight specific features: 1 points to the view dropdown, 2 points to the 'RF' status code, 3 points to the 'S' status code, 4 points to the 'Tags' column, 5 points to the 'Dsc' column, and 6 points to the 'Rec'd' and 'Del'd' columns. The table contains three rows of data, each with a 'view' link.

Submitted Date	Last 90 Days	Status	Tags	Doctor	Laboratory	Date Needed	Received	Delivered
9871855	RF	S	+	Commerce	Test Doctor	7/29/25	N	N
9835705		P	+	Commerce	Test Doctor	7/28/25	N	N
9835666		S	+	Commerce	Test Doctor	7/28/25	N	N

Portal Navigation – Dashboard Messages & Notifications

Internal and external messages & notifications appear in the dashboard view in several ways.

- 1 New message indicator in the top menu
- 2 Red Asterisk indicates new message specific to order
- 3 Indicates the number of new clinical notifications
- 4 Pending notifications panel

The screenshot displays the NDX National Dentex Labs dashboard. At the top right, a navigation bar includes links for Home, Contact Support, and a '1 New Messages' indicator (labeled 1). Below this, a sidebar on the left lists various notification categories with counts: Saved (39), Favorites (22), All Submitted (42), Checked-in (26), Completed (0), Shipped (2), Received (4), Digital Submitted (2), Physical Submitted (20), Needed Soon (21), Appointment Date (8), Mark Cases Rec/Del (42), Clinical Notifications (1 today) (labeled 3), Messages (0), and a Pending Notifications panel (labeled 4) showing messages from Evan Nightingale, Tom Alo, Bill Murray, and others. The main content area features a 'Favorite Prescriptions' table with columns for Submitted Date, Last 90 Days, Office, Doctor, Tag, Laboratory, Date Needed, Rec'd, and Del'd. A red asterisk (labeled 2) is next to the ID 10275250, indicating a new message specific to that order. The table lists several prescriptions, including those for Rich Moore, Hank Maple, Fred Jones, Katie Mulvihill, Cory Mills, Allie Oop, Gemma Stone, Tater Puff, Tater Skins, and Tater Chip.

Submitted Date	Last 90 Days	Office(All)	Doctor(All)	Tag(All)	Laboratory(All)	Received: All	Delivered: No	Search this queue			
ID	Patient	S	Tags	Dsc	Appt. Office	Doctor	Laboratory	Date Needed	Rec'd	Del'd	view
10368459	Rich Moore	S	+		Commerce	Test Doctor	NDX Demo Account	11/12/25	N	N	view
★ 10307890	Hank Maple	P	+		Commerce	Test Doctor	NDX Demo Account	11/11/25	N	N	view
★ 10294317	Fred Jones	P	+		Commerce	Test Doctor	NDX Demo Account	11/10/25	N	N	view
10287745	Katie Mulvihill	S	+		Commerce	Test Doctor	NDX Demo Account	10/29/25	N	N	view
10284491	Cory Mills	S	+		Commerce	Test Doctor	NDX Demo Account	11/11/25	N	N	view
10283873	Allie Oop	S	+		Commerce	Test Doctor	NDX Demo Account	11/3/25	N	N	view
10283842	Gemma Stone	S	+		Commerce	Test Doctor	NDX Demo Account	10/30/25	N	N	view
★ 10275250	Tater Puff	CK	+		Commerce	Test Doctor	NDX Demo Account	11/12/25	N	N	view
10275223	Tater Skins	CK	+		Commerce	Test Doctor	NDX Demo Account	11/3/25	N	N	view
10274988	Tater Chip	CK	+		Commerce	Test Doctor	NDX Demo Account	10/29/25	N	N	view

Order View – Clinical Notifications

Clinical notifications appear in the dashboard view in several ways.

- 1 Click “Notifications” in the left panel
- 2 Click “Respond to the notification” in the pending notification message box
- 3 Click “Case Notifications” above the dental chart

The screenshot displays the NDX portal interface for a user named Evan Nightingale. A progress bar at the top shows the order status: Submitted (Jul 25th), Checked-in at lab (Aug 4th), Completed, and Shipped. On the left, under the 'Actions' menu, the 'Notifications' link is highlighted with a red box and a red '1'. In the center, a notification message box is highlighted with a red box and a red '2', stating: 'You have a pending notification! Please respond so the laboratory can proceed! Respond to the notification.' Below this, the 'Case Notifications' link is highlighted with a red box and a red '3'. At the bottom, the dental chart is visible, with the 'UPPER' and 'LOWER' sections labeled. The 'UPPER' section shows a red tooth icon, and the 'LOWER' section shows a red tooth icon.

CREATE RX FOR SAME PATIENT

Evan Nightingale
NDX Demo Account

Submitted Jul 25th | Checked-in at lab Aug 4th | Completed | Shipped

Actions

- Print
- Print Label
- 1 ? Notifications ***
- Comments *
- Appointment Date
- Tag This Rx
- Link *
- Share With Colleague
- Patient File
- View Patient Information
- Track Outbound Package
- Set Received Status
- Set Delivery Status
- Prescription Feedback ✓
- Take Me Home

Prescription ID: 9871855
Laboratory: NDX Demo Account
Practice: NDX Demo Account Test Practice
Doctor: Test Doctor
Patient: Evan Nightingale
Standard ... Click to show

Status: Arrived
Date In: 8/4/25
Date Needed: 7/29/25
Date Received: Not Received
Date Delivered: Not Delivered
Ship To Address: 123 Elm Street, Commerce, Alabama 12X 345, United States
Office Phone: 444-555-6789

2 You have a pending notification! Please respond so the laboratory can proceed! [Respond to the notification.](#)

3 **Case Notifications** **1**
Templates: Single PFZ Crown
Parts Upper: Porcelain Fused to Zirconia Crown

UPPER **LOWER**

Example Notification:

Lab requesting verification to proceed with order fabrication

The screenshot shows the 'Clinical Verifications' modal window. It displays a notification for 'Aug 15th' with a 'view' link. The notification is 'Pending' and was sent on 'Fri, 15 Aug 2025 11:42:37 -0400'. The request message is 'Please approve this file'. The notification is regarding 'General Treatment'. The user is asked to 'Certify by confirming with electronic signature.' and to enter their 'Doctor's Name'. There are two buttons at the bottom: 'I approve the proposed treatment plan' (green) and 'I decline the proposed treatment plan' (red).

Clinical Verifications

Aug 15th [view](#)

Pending

Sent On: Fri, 15 Aug 2025 11:42:37 -0400

Request Message
Please approve this file

Notify Regarding
General Treatment

Signature
Certify by confirming with electronic signature.
☐ Doctor's Name

Message

☐ I approve the proposed treatment plan

☐ I decline the proposed treatment plan

Order View – Order Comments

Order comments can be added, viewed and edited at the case level. This feature is intended for communication within your practice only and can not be seen by your lab.

- 1 Select “Comments”
- 2 Type your comment and click “Add new EasyComment”
- 3 Click “Edit” to adjust a previously sent comment

CREATE RX FOR SAME PATIENT

Actions

Print

Print Label

Notifications*

Comments*

Appointment Date

Tag This Rx

Link*

Share With Colleague

Patient File

View Patient Information

Track Outbound Package

Set Received Status

Set Delivery Status

Prescription Feedback ✓

Take Me Home

Evan Nightingale

NDX Demo Account

Submitted
Jul 25th

Checked-in at lab
Aug 4th

Completed

Shipped

Prescription ID: 9871855

Laboratory: NDX Demo Account

Practice: NDX Demo Account Test Practice

Doctor: Test Doctor

Patient: Evan Nightingale

Standard ... Click to show

Status: Arrived

Date In: 8/4/25

Date Needed: 7/29/25

Date Received :
Not Received

Date Delivered:
Not Delivered

Ship To Address:
123 Elm Street
Commerce, Alabama 12X 345
United States

Office Phone: 444-555-6789

You have a pending notification! Please respond so the laboratory can proceed! Respond to the notification.

Case Notifications

Templates: Single PFZ Crown

Parts Upper: Porcelain Fused to Zirconia Crown

NDX Demo Account ... test
Tue Sep 09 2025

Delete

NDX Demo Account ... Responding to the test.
Wed Sep 10 2025

Delete

Hide all 2 comments

Add a Comment

2

EasyComments

Add new EasyComment

Code	Comment	Actions
null		edit
null	TM Test	3 edit

SAVE COMMENT

Hide EasyComments

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For Portal Assistance Call 800.678.4140

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Order View – RX Tagging

Tags can be any text or "indication" you want to associate with a prescription i.e. "Needs Dr Review." Tags are searchable, so use descriptive, easy-to-search terms. This is for your team. The lab does not see this.

- 1 Select Tag This RX
- 2 Select desired tag(s)
- 3 Click Save

CREATE RX FOR SAME PATIENT

Evan Nightingale
NDX Demo Account

Submitted Checked-in at lab Completed Shipped

Actions

- Print
- Print Label
- Notifications *
- Comments *
- Appointment Date
- Tag This Rx 1**
- Link *
- Share With Colleague
- Patient File
- View Patient Information
- Track Outbound Package
- Set Received Status
- Set Delivery Status
- Prescription Feedback ✓
- Take Me Home

Tag This Rx

Select which tags you would like on this script.

Select Some Options

SAVE 3

UPPER LOWER

View and Download Statements & Invoice Details

- 1 Click on your Account Profile and select “Lab Invoices & Payments”
- 2 Click “View & Export Invoices”
- 3 Click “Download” for monthly statements or “Export Statements To CSV”

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Home Contact Support Messages NDX Lab Management S

Dashboard Patients Templates

dashboard needed by date awaiting feedback billtrust

CREATE RX

Favorite Prescriptions

All Submitted (EasyRx Default View) SAVE VIEW AS SET AS DEFAULT

Submitted Date	Last 90 Days	Office(All)	Doctor(All)	Tag(All)	Laboratory(All)	Received: All	Delivered: No	
ID	Patient	S	Tags	Dsc	Appt. Office	Doctor	Laboratory	Date N
10812001	Jack Hamstead	S	+		Palm Beach Gardens	NDX LMS	National Dentex Labs	2/16/26

Account Settings
3D Printer Integrations
New Agreements
Billing Information
Lab Invoices & Payments
Invoices
Recent Alerts
View Parts & Appliance Library
Contact Support
What's New

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Home Contact Support Messages NDX Lab Management S

Dashboard Patients Templates Stats Scripts Q

lab invoices & payments easyrx invoices billtrust - view bills & pay

Lab Invoices & Payments

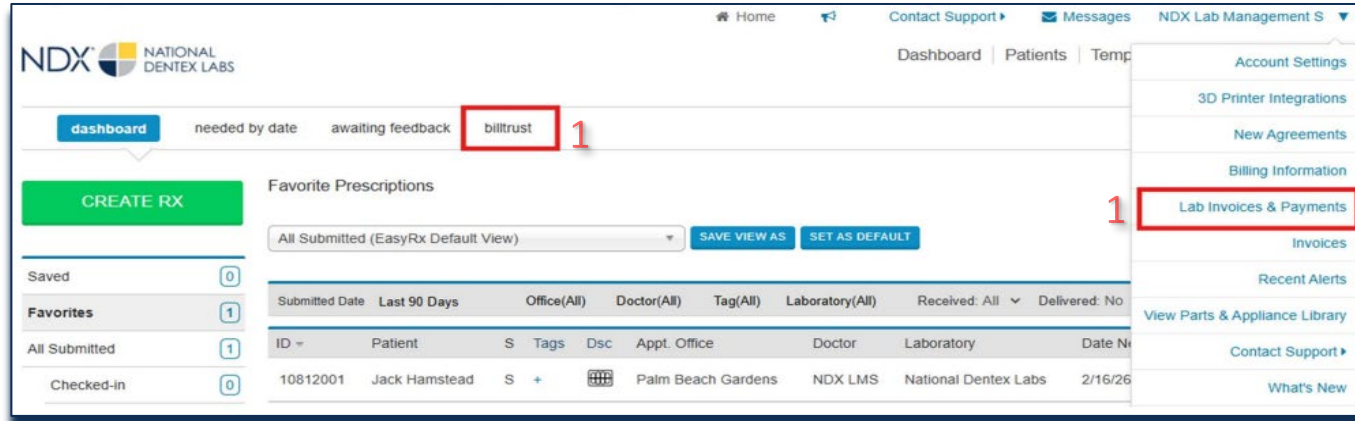
Laboratory Name	Phone	Doctor(s)	Actions
National Dentex Labs	(833-299-0696)	NDX LMS (ID: 124084)	View & Export Invoices

lab invoices & payments my statements

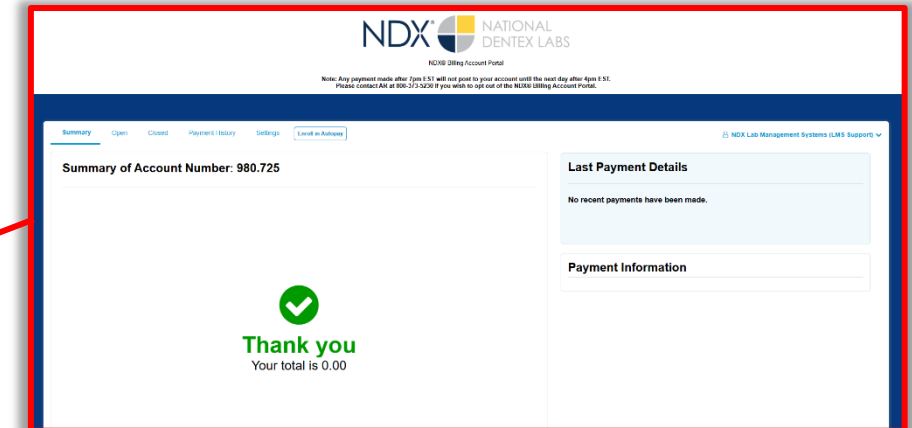
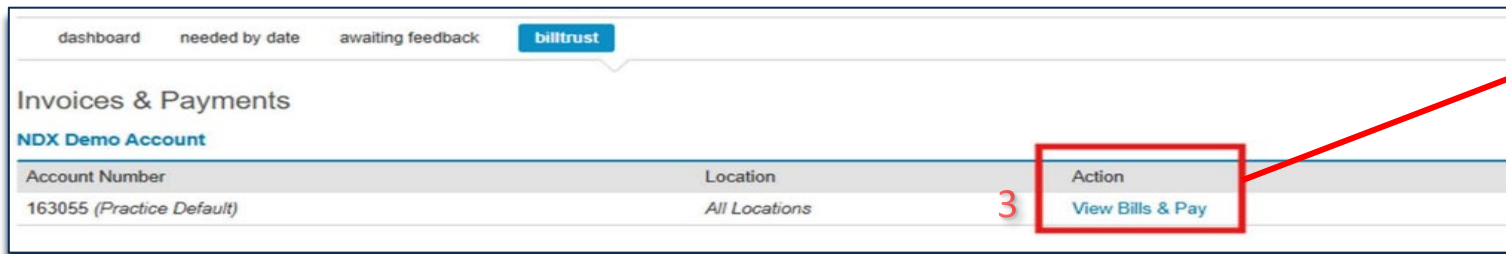
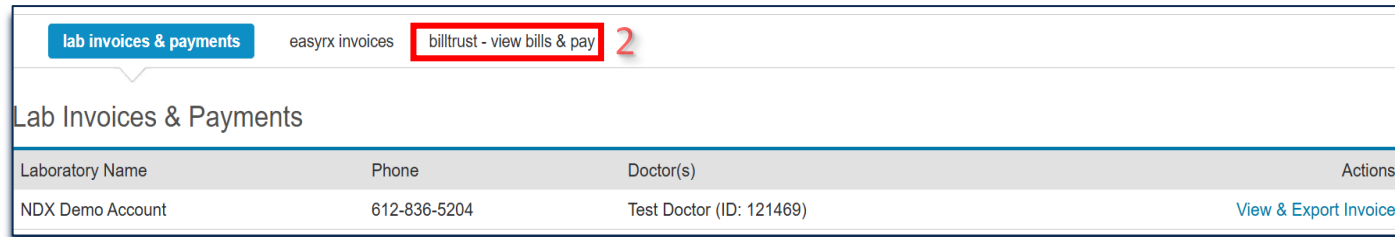
Accounting Period	Actions
2026/01	download
2025/12	download

EXPORT STATEMENTS TO CSV

View Invoices/Statements & Make Payments with Billtrust



- 1 Click "Billtrust" at the top of the dashboard or click on your "Account Profile" and select "Lab Invoices & Payments"
- 2 Click "Billtrust- View Bills & Pay"
- 3 Click "View Bills & Pay" to enter the Billtrust Portal



Portal Account Settings – User Accounts

1 Click on your Account Profile and select “Account Settings”

2 Select “User Accounts”

The screenshot shows the NDX National Dentex Labs portal. The top navigation bar includes 'Home', 'Contact Support', 'Messages', and 'NDX Demo Account Test'. The 'Account Settings' menu is open, showing options like '3D Printer Integrations', 'Billing Information', 'My VisualDLP Labs', 'Invoices', 'Recent Alerts', 'View Parts & Appliance Library', 'Contact Support', 'What's New', 'Compliance Information', 'Change Password', and 'Sign Out'. The 'User Accounts' option is highlighted with a red box and a red number '2'. The 'Manage Your Practice' section on the left lists various settings like Profile, Billing, Account Options, Favorite Views, Dashboard Options, Default Lab, Order Lab List, Email Address, Password, Clinical Staff, Security & Compliance, 3rd Party Integrations, Alert Notification, EasyComments, Message Recipients, Merge Duplicate Patients, Print Dashboard Setup, Print Label Setup, and Prescription Template Pricing.

3 Click the "Create New Clinician Account" to add a user.

4 Set permissions as required for the specific user

The screenshot shows the 'Manage Clinician' page. It features a search bar with the text 'Search this queue' and a magnifying glass icon. Below the search bar is a table with columns for 'E-Mail Address', 'First Name', and 'Last Name'. The table contains two rows: 'SPatel@test.com' with 'Sara' and 'Patel', and 'Anna@test.com' with 'Anna' and 'Seville'. Each row has a 'view edit' link. A red box highlights the 'Create New Clinician Account' button at the bottom left. Red annotations include: 'Huge practice? Need to find an employee? Search bar is your friend!' pointing to the search bar, and 'Manage existing accounts here or edit their names/emails/permissions.' pointing to the table.

The screenshot shows the 'Manage Clinician' form. It includes fields for 'First Name', 'Last Name', and 'E-Mail Address'. Below these is a 'Date Format' dropdown menu set to 'mm/dd/yyyy'. There are radio buttons for 'Status' (Active/Inactive) and checkboxes for 'Edit Prescriptions', 'Edit EasyComments', 'Edit Templates', 'Finances', and 'In-House Lab Technician'. Red annotations include: 'Their login information will be emailed here - be sure to double check spelling' pointing to the 'E-Mail Address' field, and 'Lab Tech accounts are very limited and can only see Rx's submitted to your in-house lab' pointing to the 'In-House Lab Technician' checkbox.

NOTE: You will want to disable access for employees that leave the practice. Simply mark those employee's accounts as 'inactive' and save. You do not want to delete the user because EasyRx tracks previous prescriptions and who created/edited it, you still want their record in EasyRx to track them if needed down the road.

Enable Daily Digest Emails

1 Click on your Account Profile and select “Account Settings”

2 Select “Alert Notifications”

3 On the Alert Notifications page, add notifications using the drop-down options

4 Once the 'Notification Method' is selected, a text box will appear to enter the recipient's email address

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Home Contact Support Messages NDX Demo Account Test

Dashboard Patients Account Settings

3D Printer Integrations

Billing Information

My VisualDLP Labs

Invoices

Recent Alerts

View Parts & Appliance Library

Contact Support

What's New

Compliance Information

Change Password

Sign Out

Manage Your Practice

Profile Add and edit practitioners and offices.

Billing Edit your subscription and the credit card to bill the charges to.

Account Options Set multiple email addresses for invoice and clinical notifications. Set whether your account participates in the easyrx network.

Favorite Views Manage Favorite Views

Dashboard Options Manage dashboard options.

Default Lab Configure the default lab. This lab will be chosen by default when creating a new script.

Order Lab List Configure the practice to place lab orders on the prescription page.

Email Address Edit the administrator email address.

Password Edit the administrator password.

Clinical Staff Add and edit staff. The staff names will appear on checkout to allow the user to record who submitted the case and who took the scan.

User Accounts Create and manage an unlimited number of user accounts. Permissions can be set per user to hide sensitive information and prevent access.

Security & Compliance Manage security and compliance settings.

3rd Party Integrations Configure access to intraoral scanner portals, external software, and data.

Alert Notification Configure email, digest, and desktop notification alerts when different events occur.

EasyComments Configure the EasyComment macros in the comments section of the prescription editor.

Message Recipients Manage users who can be message recipients.

Merge Duplicate Patients Merge duplicate patients for this practice.

Print Dashboard Setup Configure the items that print, when printing from the dashboard.

Print Label Setup Configure font size, label size, and items displayed on print label.

Prescription Template Pricing Set the cost charged to your practice of your templates by your labs. When pricing is set, clinical staff will be offered the option to switch to a different template.

Manage Alert Notifications

Active Notifications

Event	Alert Method	Recipient	Actions
Prescription Submitted to In-House Lab	Push	TW Orthodontic Practice	edit delete
Date Needed Changed	Push	In-House Lab	edit delete
Clinical Notification Received	Desktop	TW Orthodontic Practice	edit delete
Feedback Received for In-House Prescription	Push	TW Orthodontic Practice	edit delete

Add Notification

3 Send Notification When Case has been checked in

Notification Method Email

4 Send Email To

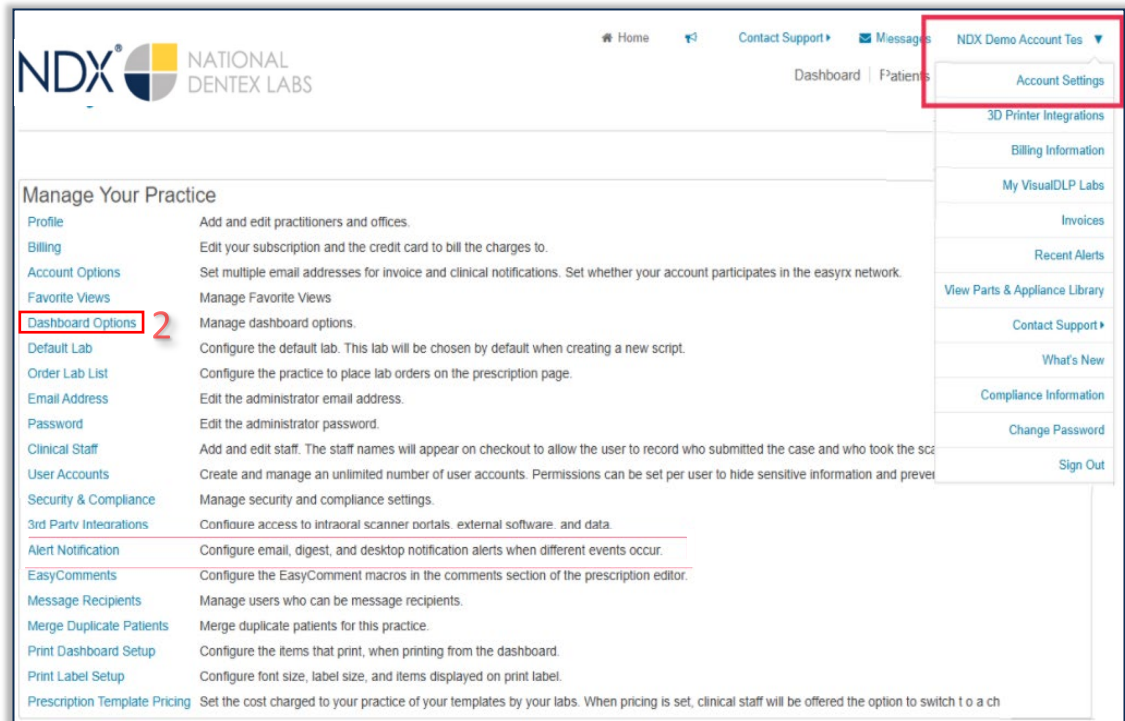
[SAVE](#) [Cancel](#)

Note: If the same recipient email address is entered for multiple digest email alerts, then one single digest email will be sent that includes all of the requested updates. Digest emails are automatically generated and sent to the recipient's email address at approximately 3:00 AM/ET.

Customizing Dashboard Color Codes

1 Click on your Account Profile and select "Account Settings"

2 Select "Dashboard Options"



3 Select "Color based on date needed" and enter the desired warning time frame

4 Choose the desired color for each option and click "Save"

The 'Dashboard Options' form is shown. The 'Dashboard Highlight' section explains that rows are highlighted in green or white by default, but can be color-coded by date needed. The 'How would you like to highlight rows?' dropdown is set to 'Color based on date needed'. Below this, a text input field asks 'if color based on date needed is selected, warn how many days before cases are needed?' with the value '4' entered. Further down, three color selection dropdowns are shown: 'Red' for cases that are past their date needed, 'Yellow' for cases that are not yet received and a certain number of days away from the date needed, and 'Orange' for cases that are received but not delivered. A green 'SAVE' button is at the bottom.



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