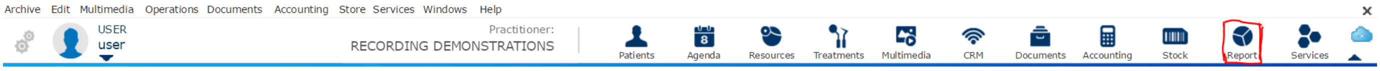
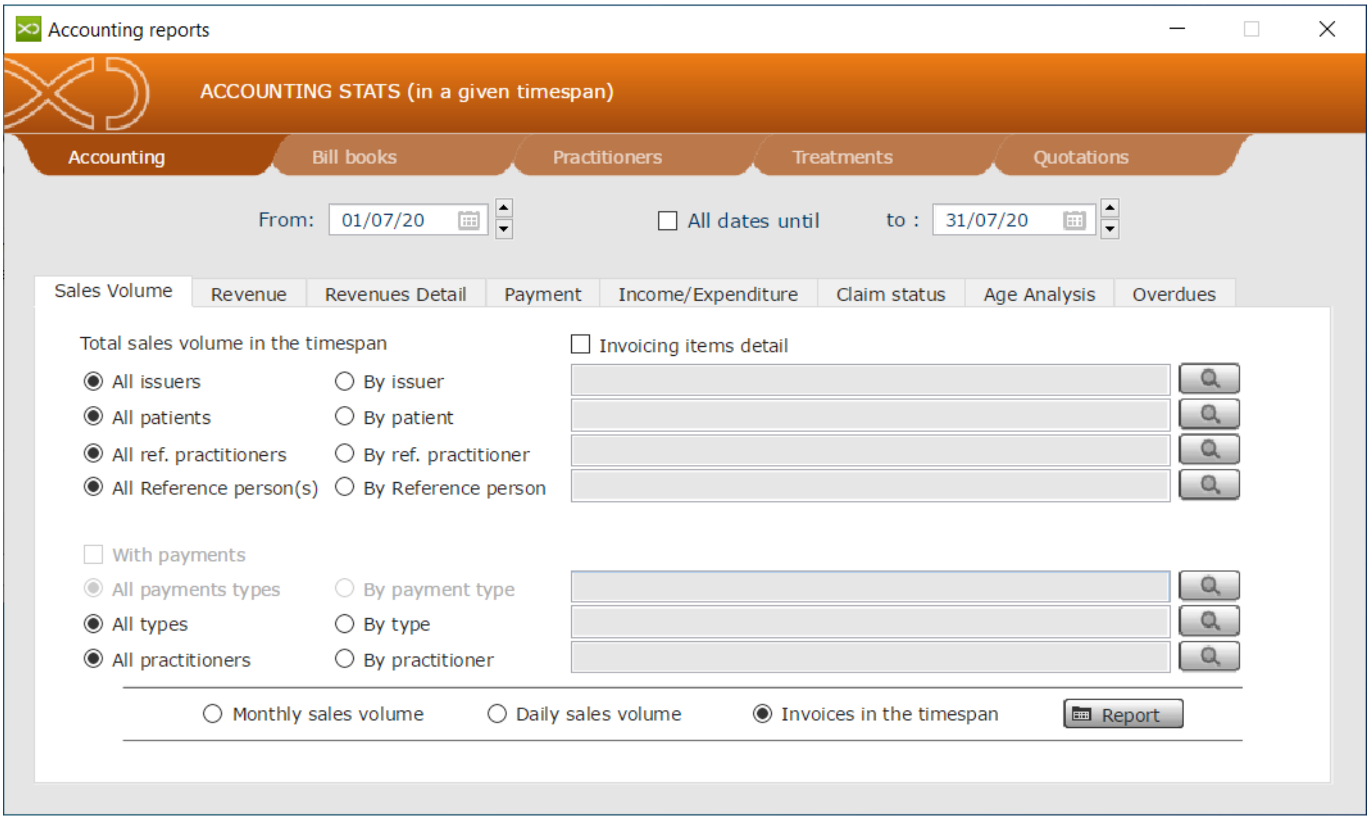
The following reports are Xdent Suggested Reports to facilitate a streamlined set of reports for Daily and Monthly needs.
All reports can be accessed from the "*Report*" section located at the top right-hand side of the screen and selecting "*Accounting reports*"



Suggested Day End reports

Patients Invoiced Report (Summery)

Function: To have a list of patients invoiced for a specific Day OR a Specific Date Rage containing a *summery* of the invoiced totals.
Location: Report > Accounting reports > Accounting Tab > Sales Volume option
Leaving all selections as default just update the "*From:*" and the "*To:*" dates as required.



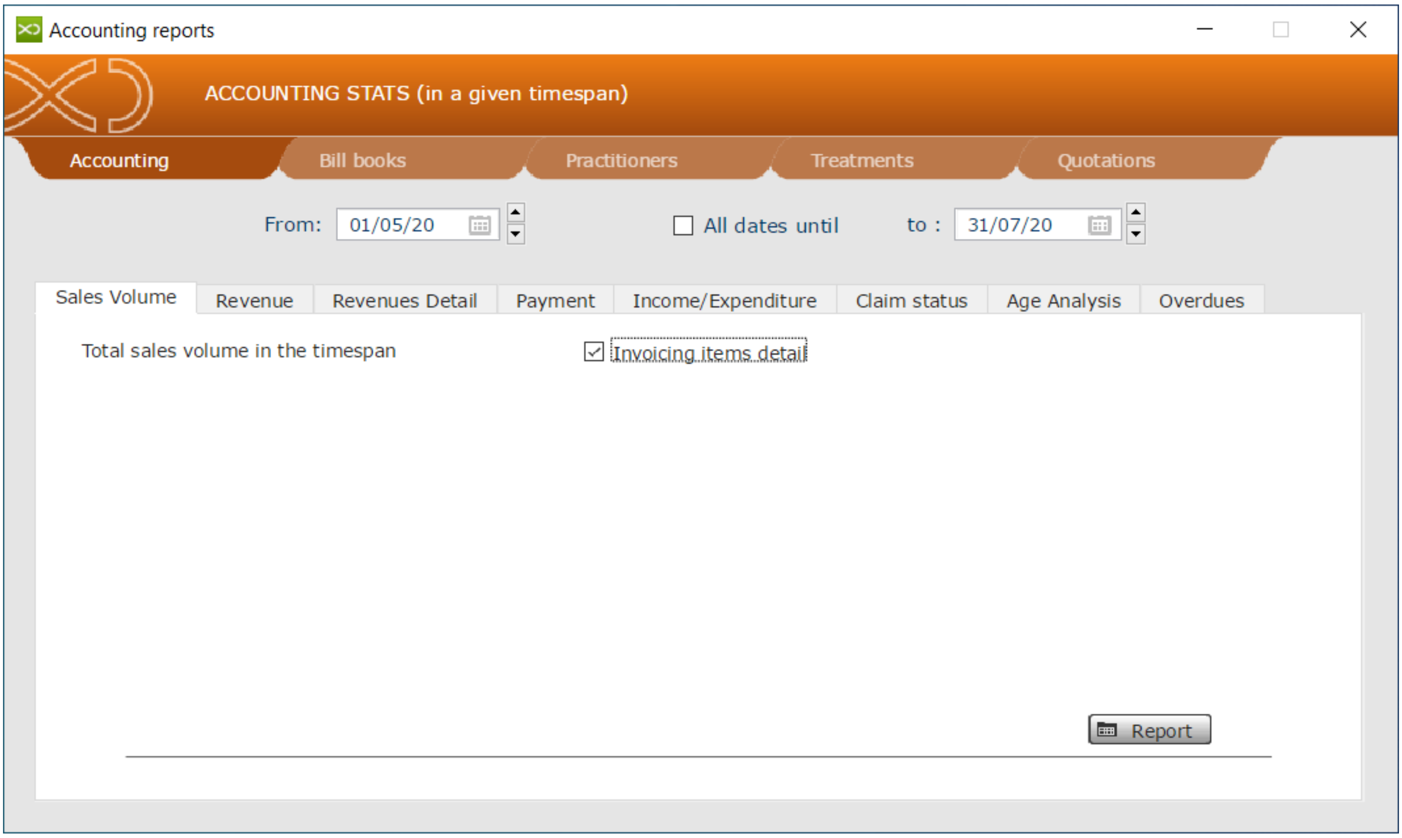
* Please take note
This report can also be used as a Month End Financial Report as well for those monthly income reports.

<u>Patients Invoiced Report (Detailed)</u>

Function: To have a list of patients invoiced for a specific Day OR a Specific Date Rage containing a *<u>detailed</u>* list of the invoiced items.

Location: Report > Accounting reports > Accounting Tab > Sales Volume option

Update the "*From:*" and the "*To:*" dates as required and select the option "□ *Invoicing items detail*" to create a detailed report list.



* Please take note

This report can also be used as a Month End Financial Report as well for those monthly income reports.

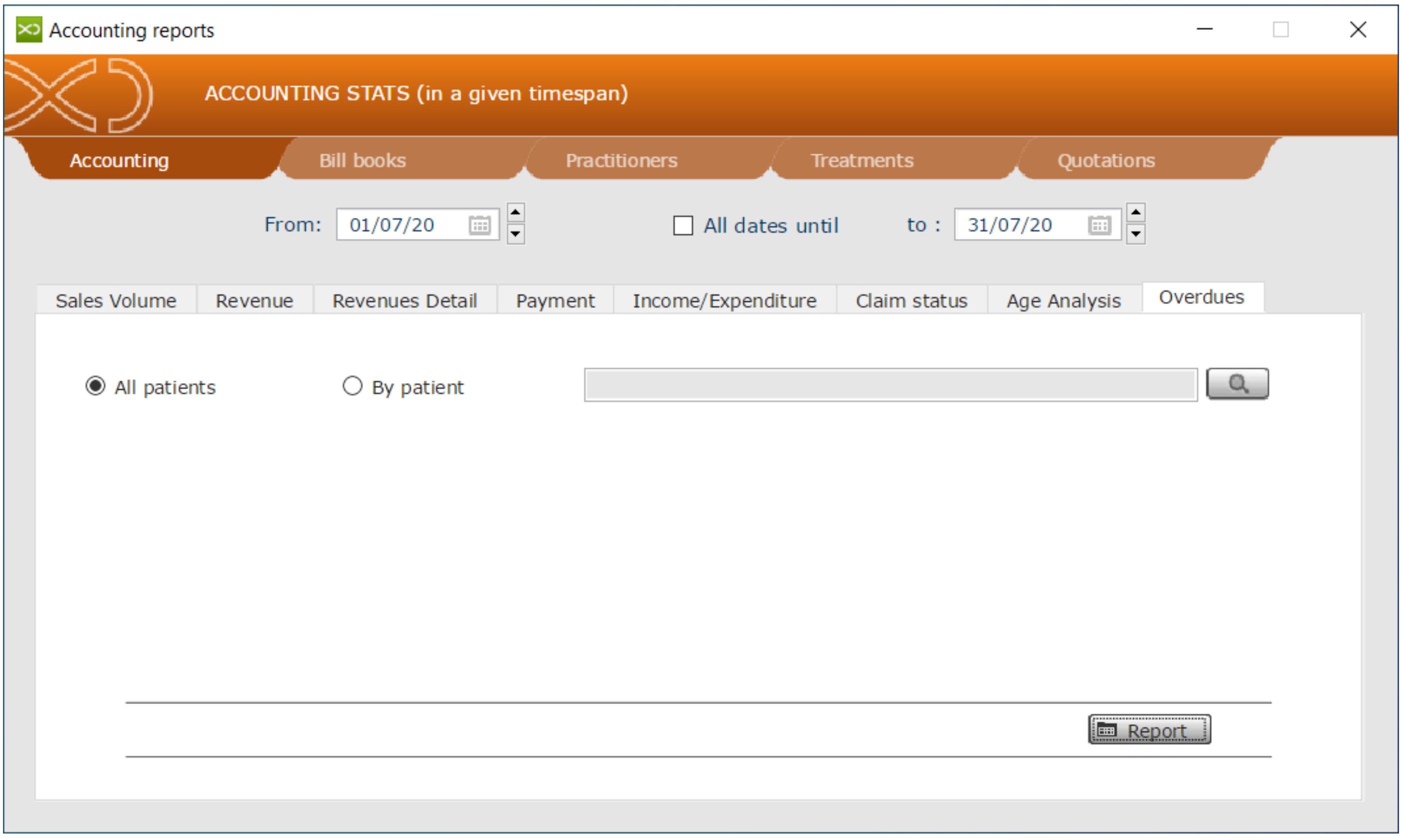
Dental Information System

<u>Account Outstanding Report</u>

Function: To have a list of all outstanding patient's accounts for payment follow-up.

Location: Report > Accounting reports > Accounting Tab > Overdues option

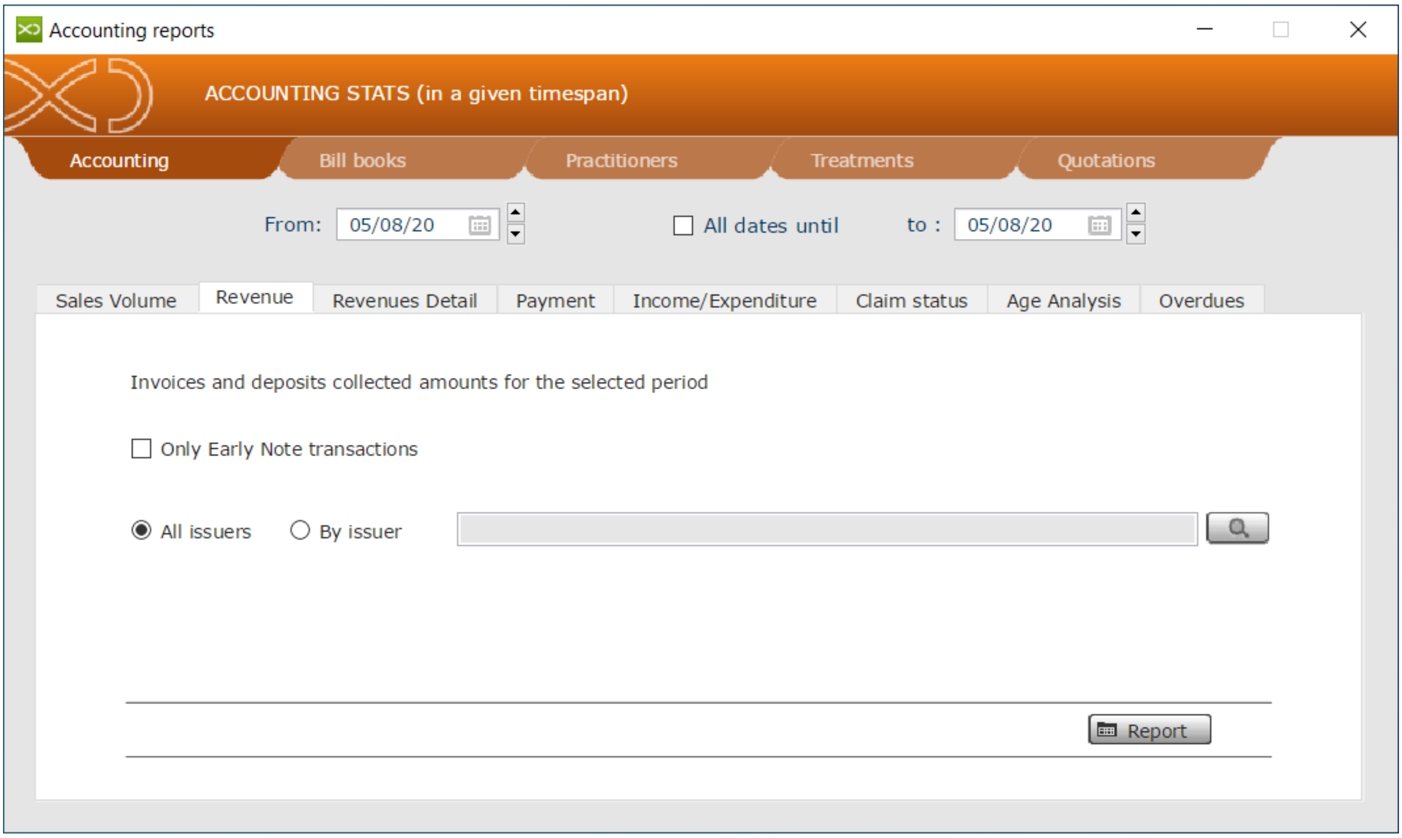
This report will list all accounts with outstanding amounts. It will not give a break down of what treatments or procedures are outstanding. It will merely list the amount outstanding per invoice.



Payments Received Report (Summery)

Function: To give a report on all payments received for a specific date or date range. This will only give a summarised version of the report for a detailed version please see the next page " *Payments received report (Detailed)"*

Location: Report > Accounting reports > Accounting Tab > Revenue option



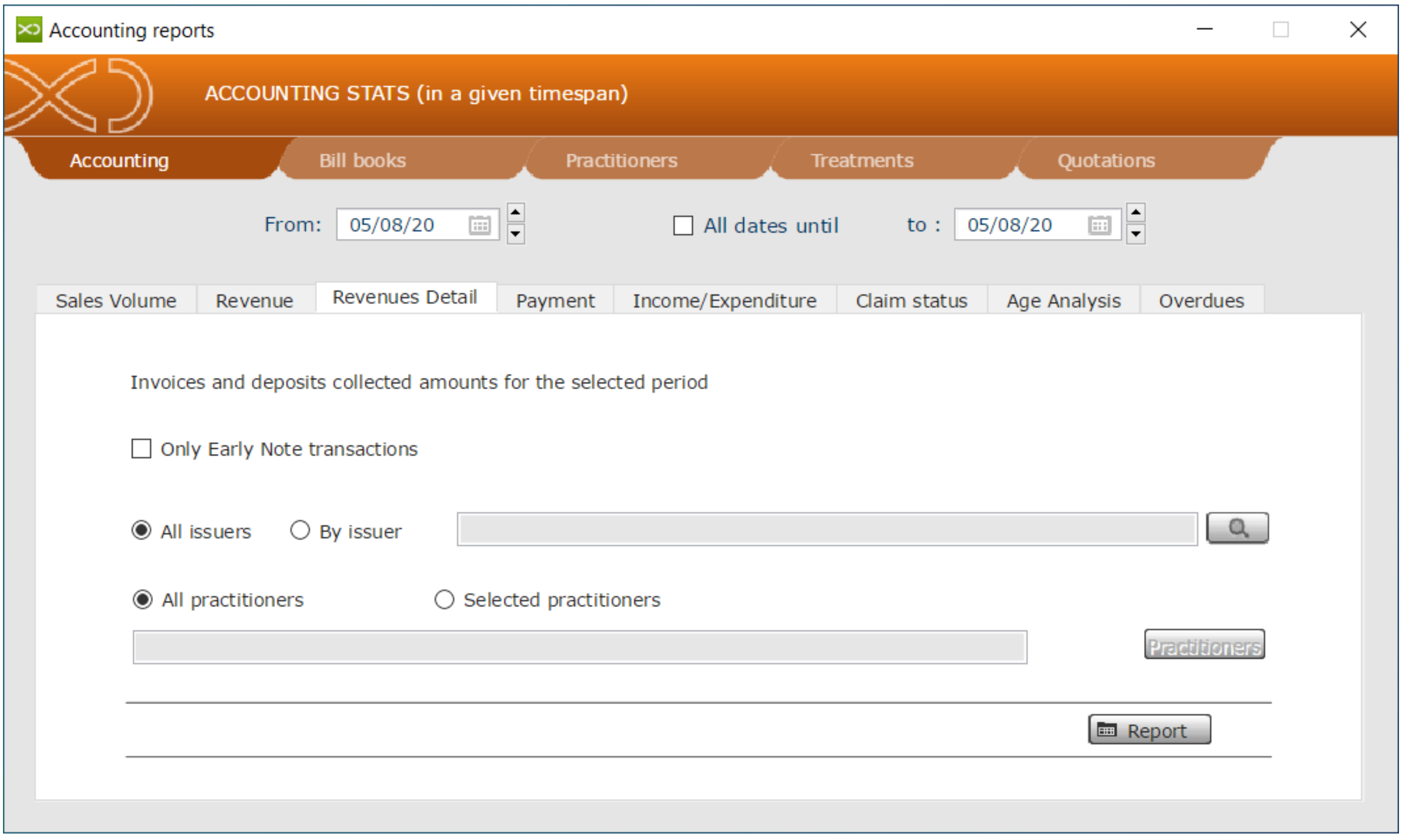
* Please take note

This report can also be used as a Month End Financial Report as well for those monthly income reports.

Payments Received Report (Detailed)

Function: To give a report on all payments received for a specific date or date range. This will list more details on payments made.

Location: Report > Accounting reports > Accounting Tab > Revenue Detail option



* Please take note

This report can also be used as a Month End Financial Report as well for those monthly income reports.

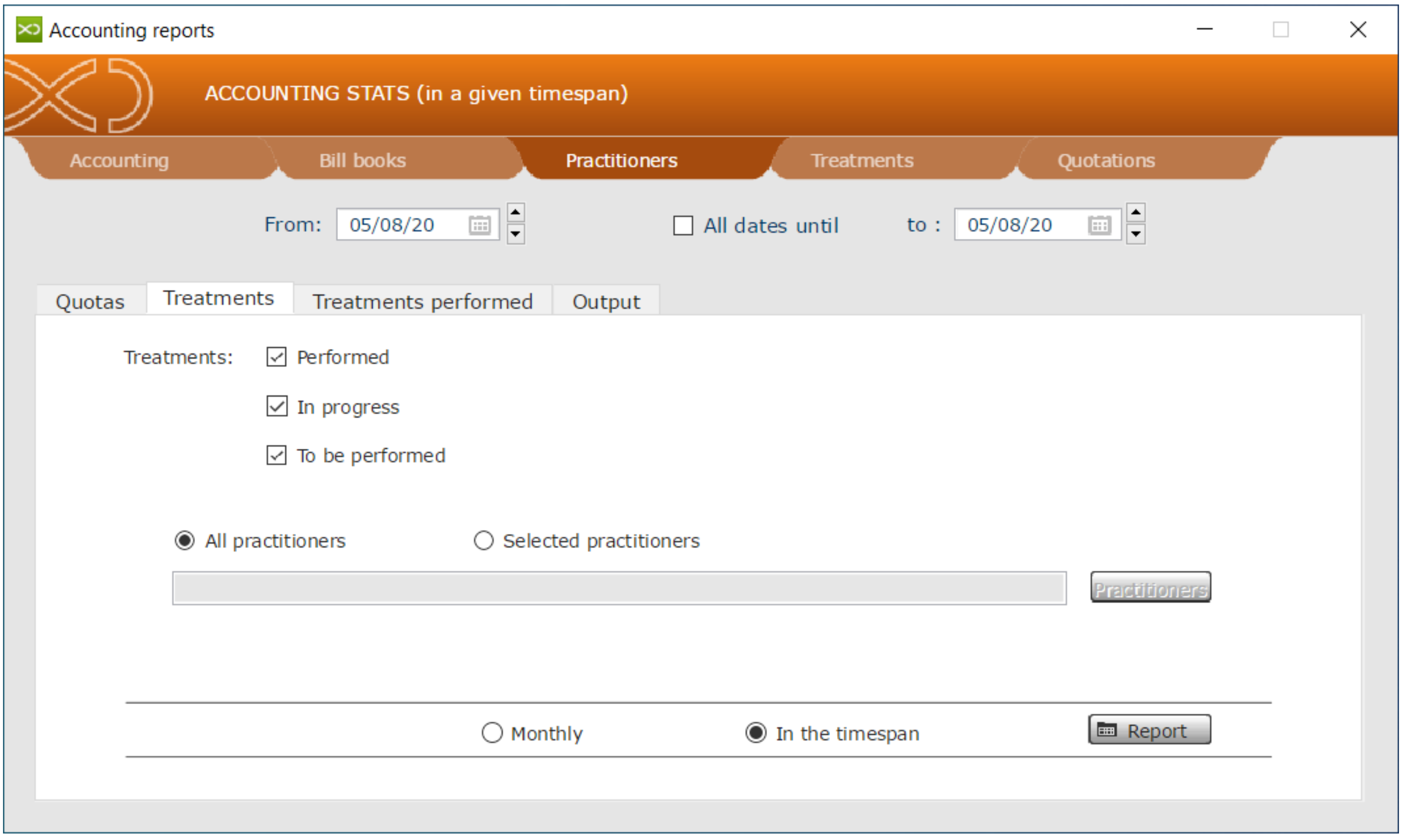
XDENT

Dental Information System

Treatment Reports

Function: To get a list of all patients and the treatments associated to these patients as well as seeing the status or progress of these treatments.

Location: Report > Accounting reports > Practitioners Tab > Treatments option



CompuGroup Medical

Suggested Month End reports

Age Analysis (Summery)

Function: To get a list of all 30, 60, 90, 120+ days outstanding accounts.
Location: Report > Accounting reports > Accounting Tab > Age Analysis option
Leaving all selections as default this will give a summarized report on the patient account aging.
For more details as to what treatments are still outstanding select the "□*Show details*"