

Detail TRXN Report

The Detail TRXN Report is similar to the [Transaction Report](#) in that it shows all transactions for a given range. The difference is that the Detail TRXN report shows anything that was entered in the Description box on a transaction.

When running a Detail TRXN report, you'll select your date range, location(s), practitioner(s), and Transactions from the menu at the top, then click Search:

| | | | | | | | | | | Download CSV |
|---------------------|--------|-----------|---------------|--------------|-------------|-----------------------|---------|----------|---------|------------------------------|
| Transaction details | | | | | | | | | | |
| INVID | APPTID | TRXN Date | Patient | Prac | Loc | Description | Debit | Credit | Balance | Method |
| 92 | 207 | Tue Aug 4 | Snow White | Alexa Hulsey | Main Street | Treatment | \$0.00 | \$0.00 | \$0.00 | |
| | | | | | | Past Due | \$0.00 | \$0.00 | \$0.00 | |
| 93 | 208 | Tue Aug 4 | Joe Smith | Joe Smith | Main Street | Treatment | \$20.00 | \$-20.00 | \$0.00 | |
| | | | | | | Patient Token Applied | \$0.00 | \$20.00 | \$20.00 | |
| 94 | 209 | Tue Aug 4 | Mary Lu Smith | Joe Smith | Main Street | | | | | CreditCard |
| | | | | | | Treatment | \$20.00 | \$-20.00 | \$0.00 | |
| | | | | | | Amount Paid | \$0.00 | \$20.00 | \$20.00 | |
| 95 | 210 | Wed Aug 5 | Mickey Mouse | Alexa Hulsey | Main Street | | | | | CreditCard |
| | | | | | | Treatment | \$20.00 | \$-20.00 | \$0.00 | |
| | | | | | | Past Due | \$20.00 | \$-20.00 | \$0.00 | |
| | | | | | | Amount Paid | \$0.00 | \$40.00 | \$40.00 | |
| 96 | 211 | Wed Aug 5 | Minnie Mouse | Alexa Hulsey | Main Street | | | | | CreditCard |

The report can be downloaded to a CSV if you'd like to sort your data.

The Detail TRXN report does NOT show check-ins for the date range. For that you'll need to run an [Appointment Report](#).

Revision #2

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Updated Wed, Jan 27, 2021 3:54 PM by [Alexa Hulsey](#)