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.

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