

Report Output Basics

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All reports have several destinations for outputting the reports. Clinic Pro recommends previewing before printing. Choose the **Print Preview** function for Output destination. This function allows a view of the actual document before printing the report (within this preview is the option to print as well). If this is a report that is desired, then choose **Send to Printer** for the Output Destination. Some reports can be saved as a Microsoft Excel Spread sheet. These can be helpful if Excel spread sheets are frequently used in the office. See below for examples.

Most reports dealing with any kind of financial information can be run including all staff doctors in Clinic Pro, or selecting an individual doctor to see the report on.

Selection Criteria

Patients: All By Doctor:

Output Destination

Print Preview Send to Printer Labels Save to File Save to Excel 5.0 File

Output Destination

Print Preview Send to Printer Labels Save to File

Date Range

Week From 12/20/2007 To 12/27/2007

Month December 2007 Year 2007

Range From 01/01/2007 To 12/27/2007

By: Entry Date Service Date

Output Destination

Print Preview Send to Printer Save to File Save to Excel 5.0 File

- Print Preview- Print preview displays exactly what will print using a preview menu before printing. When viewing the preview, click the Printer icon to print the report.
- Send to Printer- This function sends the report directly to the printer.
- Labels- Labels is a handy function to do special labels such as for mailings, patient paper records, and many more. These will print on standard 3-across 10-down label sheets.
- Save to file- This function saves a comma delimited file (CDV, CSV formats) that can be imported into programs like Outlook or sent to printer companies for print jobs. (These are not human-readable files such as word documents).
- Save to Excel 5.0- This function is good for creating spread sheets out of the data from Clinic Pro.

Be very careful when selecting an Entry date or Service date as these can produce very different results.

- **Entry date** refers to the date the transaction is entered.
- **Service date** refers to the date of service or date of payment.
- Therefore, if a date of service is 01/10/08 but was entered on 01/11/08, a report done on the 10th will produce different results when run as entry date versus service date.
- To keep the reports consistent, Clinic Pro recommends running by **entry date** when double-checking data input or balancing end-of-day cash, and by **service date** for accurate dated financial information.