

Using Standard Reports

14/05/2025 10:25 am BST

Summary

The standard report screen is a hub of reports which are available in multiple formats to be used for analysis, metric reporting and accounting.

Details

Running a Standard Report

1. Navigate to Utilities > Reports.
2. The Standard Reports tab is displayed.
3. Specify the criteria you wish to filter by for the report:

Date From and To = Filter by dates.

Client Category = The Client Category assigned to a user at registration.

Work Location = The logged in site a transaction took place.

Client Site = The Client's registered site.

4. Select a Report Category (For example, to run an accounting report, select the category 'Accounting').
5. Select a Report Format (PDF or Excel).
6. Select the report you wish to run from the drop-down list and select 'Run Report'.

Report [User - jupiter : Site - Esher : Profile - Accounts]

Standard Reports Report Wizard

Date From: 22/01/2025 Work Location: [All]

Date To: 21/02/2025 Client Site: Esher

Client Category: [All] Report Category: Appointments

Report Format: PDF Select Favourite Select Recent

Appointments Report Appointments By Surgeon Run Report

Surgeon [All]

Report Description
Count of appointments booked per Surgeon between dates specified.
Date: Appointment Date

Report Definitions

When selecting a Standard report from the list, you are provided with a brief description of what the report contains.

Report Format: PDF Select Favourite Select Recent

Monthend Report Turnover by Treatment Category - Summary By Invoice Date Run Report

Report Description
Shows turnover by Treatment Code Category between the dates specified.
Date: Invoice Date.
Note: This report is designed to run for one month only.

Favouriting Reports

You have the ability to favourite a report, this feature is by user.

Report [User - Lorraine : Site - Esher : Profile - Accounts]

Standard Reports Report Wizard

Date From: 22/01/2025 Work Location: [All]

Date To: 21/02/2025 Client Site: Esher

Client Category: [All] Report Category: Sales

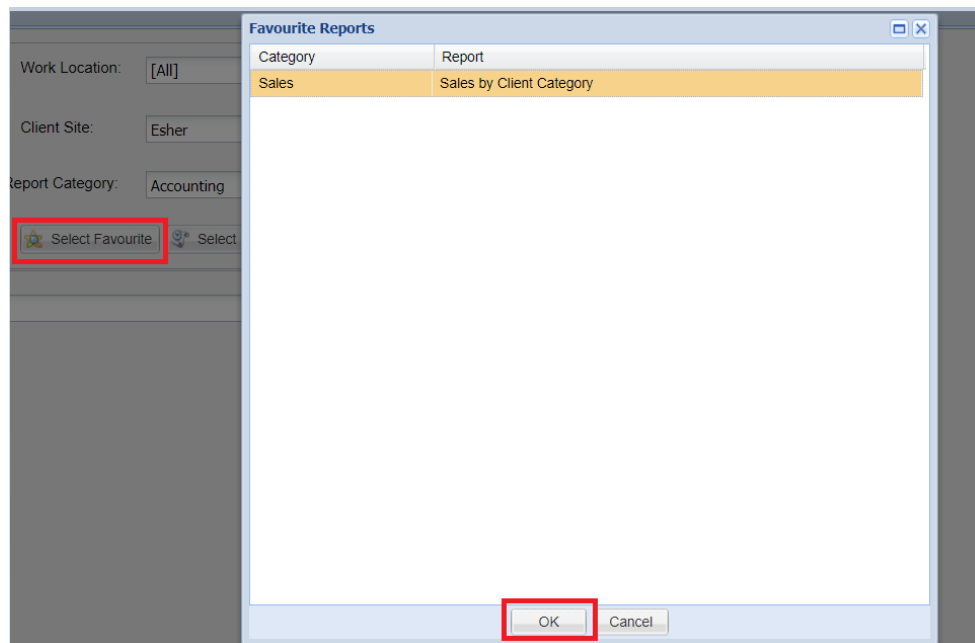
Report Format: PDF Select Favourite Select Recent

Sales Report Sales by Client Run Report

When you have the report that you wish to favourite, next to the Run Report button there will be a grey

star. once you select this star it will turn gold. To unfavourite the report just re click the star. Users can have a total of 10 favoured.

When you go back into reports you can click on the Select Favourite button and a pop up with all the favoured reports. just select the one you wish to show and click OK



There's also a Select Recent report button which will show you the last 10 reports accessed.

For a more detailed description of our Standard reports, we have categorised and documented these reports which can be accessed via the page ['Summary of Standard Reports'](#).