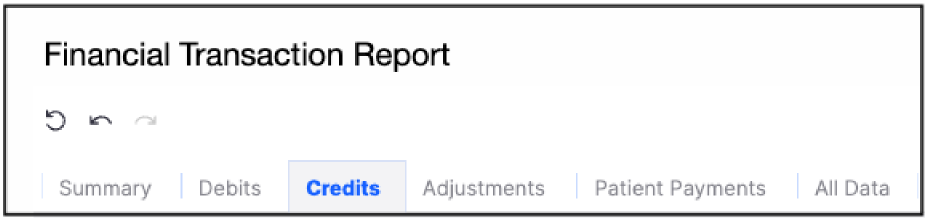
Financial Transactions Report: Credits tab

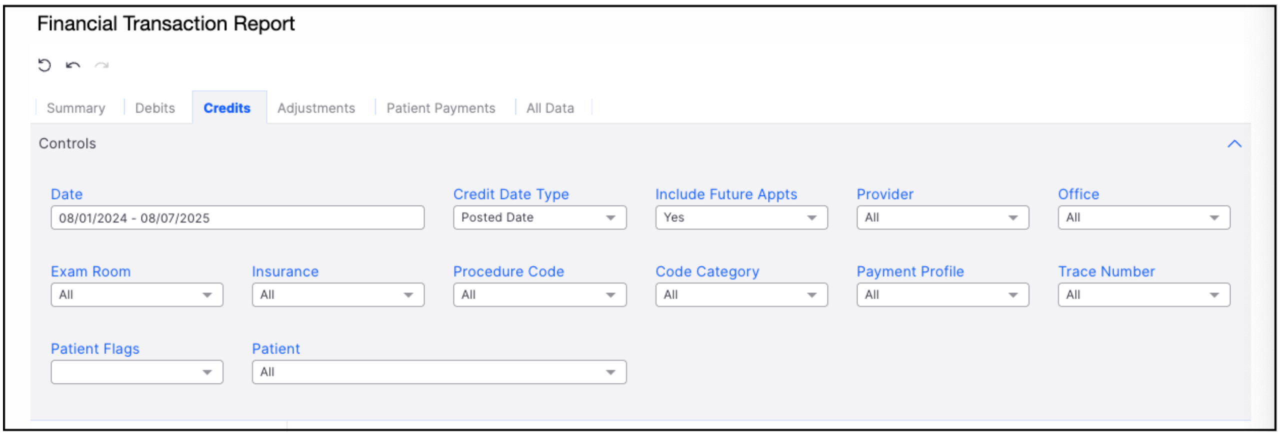
Last modified on 08/07/2025 10:12 am EDT

The third tab listed under the Day Sheet is the Credits tab. Here, you can view the payments added for the parameters you set.

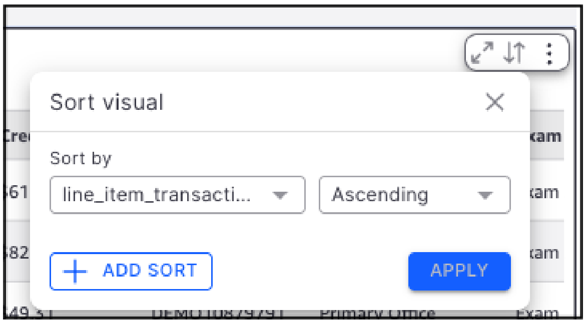


The controls available include:

- Date
- Credit Date Type
- Include Future Appts
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Code Category
- Payment Profile
- Trace Number
- Patient Flags
- Patient



Once the parameters are set, the report will populate. You can use the up/down arrow on the right side to sort the information in numerous ways. Selecting the diagonal arrows will maximize the report.



You can also export the report to CSV or Excel by pressing the 3 vertical dots. The report will be generated and available in your downloads.