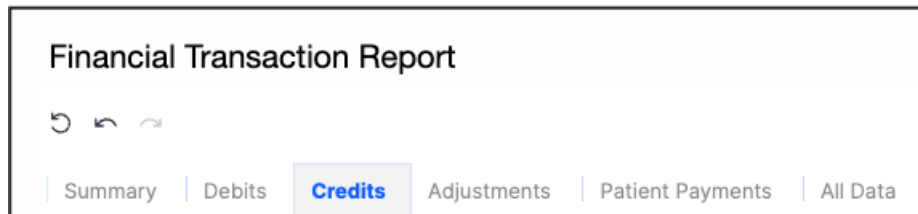


# Financial Transactions Report: Credits tab

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

The screenshot shows the 'Financial Transaction Report' header with three navigation icons. Below the header is a tabbed interface with six tabs: 'Summary', 'Debits', 'Credits' (highlighted), 'Adjustments', 'Patient Payments', and 'All Data'. Below the tabs is a 'Controls' section with a blue up arrow icon on the right. The controls are organized into three rows of dropdown menus:

Date	Credit Date Type	Include Future Appts	Provider	Office
08/01/2024 - 08/07/2025	Posted Date	Yes	All	All

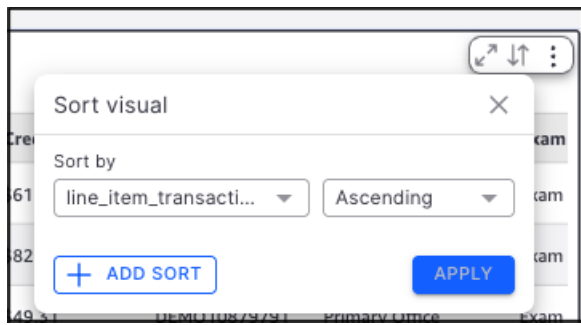
  

Exam Room	Insurance	Procedure Code	Code Category	Payment Profile	Trace Number
All	All	All	All	All	All

Patient Flags	Patient
	All

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.

