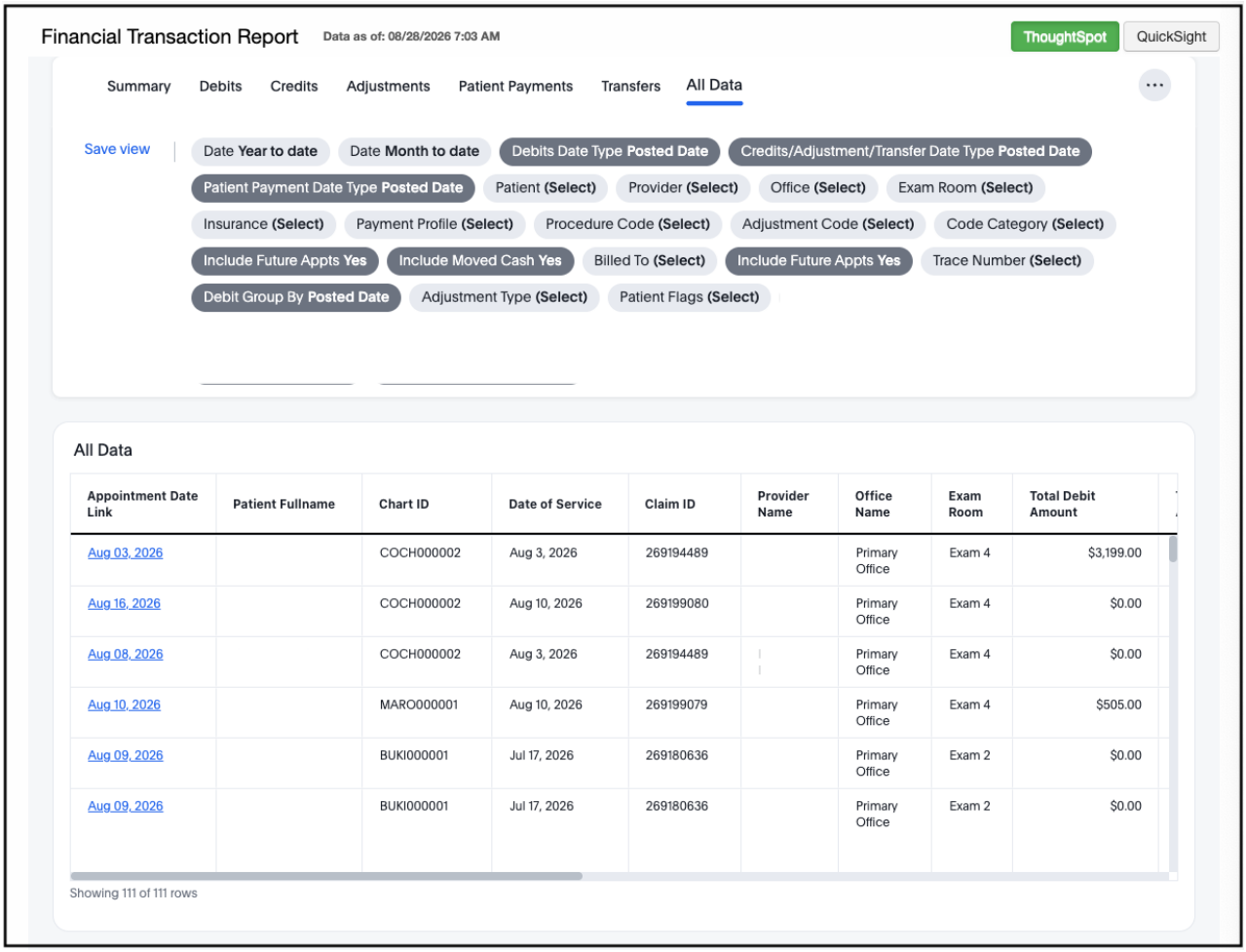
Financial Transactions Report: All Data tab

Last modified on 10/05/2026 11:56 am EDT

The seventh tab listed under the Financial Transactions Report is the All Data tab.

Here, you can view all the information corresponding to the parameters you set, including Debits, Credits, Adjustments, Patient Payments, and Transfers. You will need to scroll to the right to see some of the columns.



The controls available include:

- Date or Date Range
- Debits Date Type
- Credits/Adjustment/Transfer Date Type
- Patient Payment Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Payment Profile
- Procedure Code

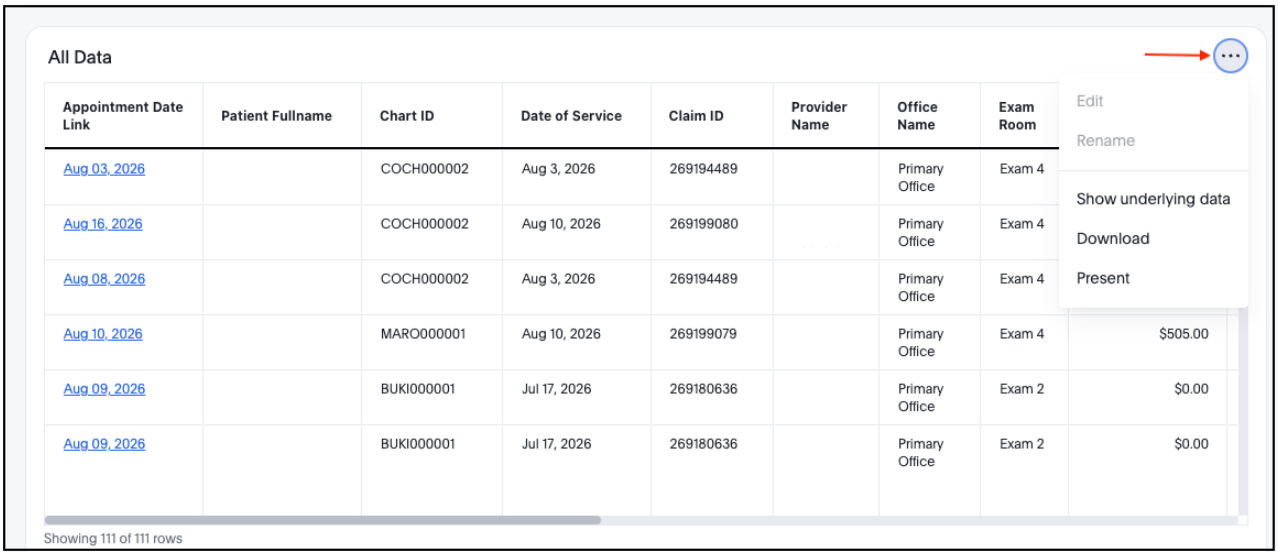
- Adjustment Code
- Code Category
- Include Future Appts
- Include Moved Cash
    - Select **Yes** if you want to view revenue listed for a certain period (could include payments that were originally posted on one day and then moved to a different posted date)
    - Select **No** if you want to view revenue by the original posted date, perhaps to verify against bank deposits
- Billed To
- Trace Number
- Adjustment Type
- Patient Flags
- Transfer Type

Options to group and view the information include:

- Debit Group By
- Group By
- Sub Group By
- Tert Group By
- Credit Group By
- Payment Group By
- Credit Date Type
- Transfer Group By

Once the parameters and group-by parameters are set, the report will populate. The left column will include a summary, and the detailed information will be listed to the right.

Hover over the top-right corner of the report to access options to view the underlying data, download the information, or maximize the view for presentation mode.



Appointment Date Link	Patient Fullname	Chart ID	Date of Service	Claim ID	Provider Name	Office Name	Exam Room	
Aug 03, 2026		COCH000002	Aug 3, 2026	269194489		Primary Office	Exam 4	
Aug 16, 2026		COCH000002	Aug 10, 2026	269199080		Primary Office	Exam 4	
Aug 08, 2026		COCH000002	Aug 3, 2026	269194489		Primary Office	Exam 4	
Aug 10, 2026		MARO000001	Aug 10, 2026	269199079		Primary Office	Exam 4	$505.00
Aug 09, 2026		BUKI000001	Jul 17, 2026	269180636		Primary Office	Exam 2	$0.00
Aug 09, 2026		BUKI000001	Jul 17, 2026	269180636		Primary Office	Exam 2	$0.00