

# Financial Transactions Report: All Data tab

Last modified on 07/16/2025 10:36 am EDT

The sixth tab listed under the Financial Transactions Report is the All data tab. Here is where you can see all the information corresponding to the parameters you set. Including Debits, Credits, Adjustments, and Patient Payments. You will need to scroll to the right to see some of the columns.

Financial Transaction Report

SummaryDebitsCreditsAdjustmentsPatient PaymentsAll Data

Controls

Date07/01/2024 - 07/16/2025

Debits Date TypePosted Date

Credits and Adjustmen...Posted Date

Patient Payments Date...Posted Date

PatientAll

ProviderAll

OfficeAll

Exam RoomAll

InsuranceAll

Procedure CodeAll

Adjustment CodeAll

Payment ProfileAll

Code CategoryAll

Include Future ApptsYes

All Data

Data Freshness07-16-2025 10:28 am

Posted Date	Patient Fullname	Chart ID	Date of Service	Claim ID	Provider Name	Office Name	Exam Room	Debit	Credit	Adjustment	Patient Payment	Insurance Name	Trace Num
7/18/24			7/18/24			Inpatient ...	Exam 1	\$150.00				Unitedhealthcare...	
11/22/24											(\$10.00)		

You can export all details to either CSV or MS Excel by pressing on the 3 horizontal dots in the right corner and selecting your file format preference. The report will be generated and can be retrieved from your downloads.

