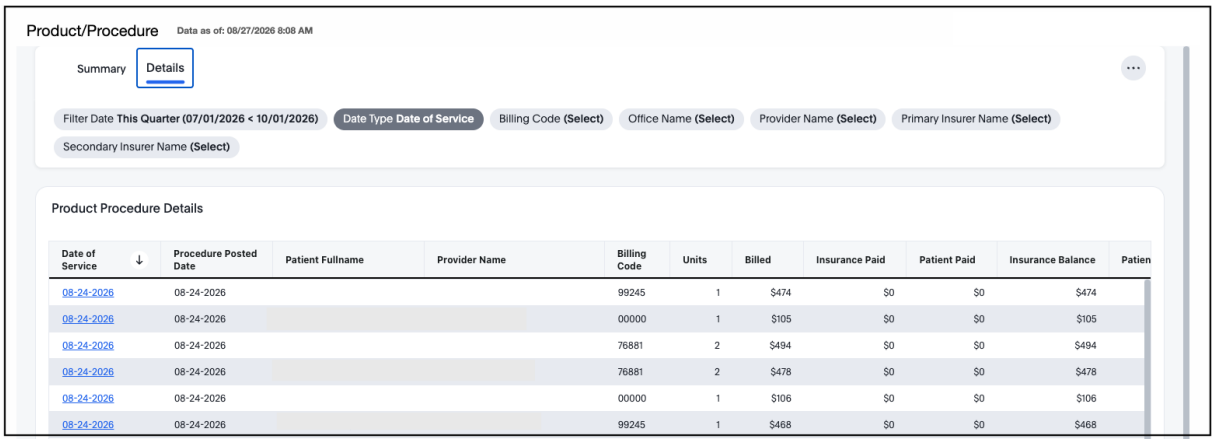
Product/Procedure Report: Details Tab

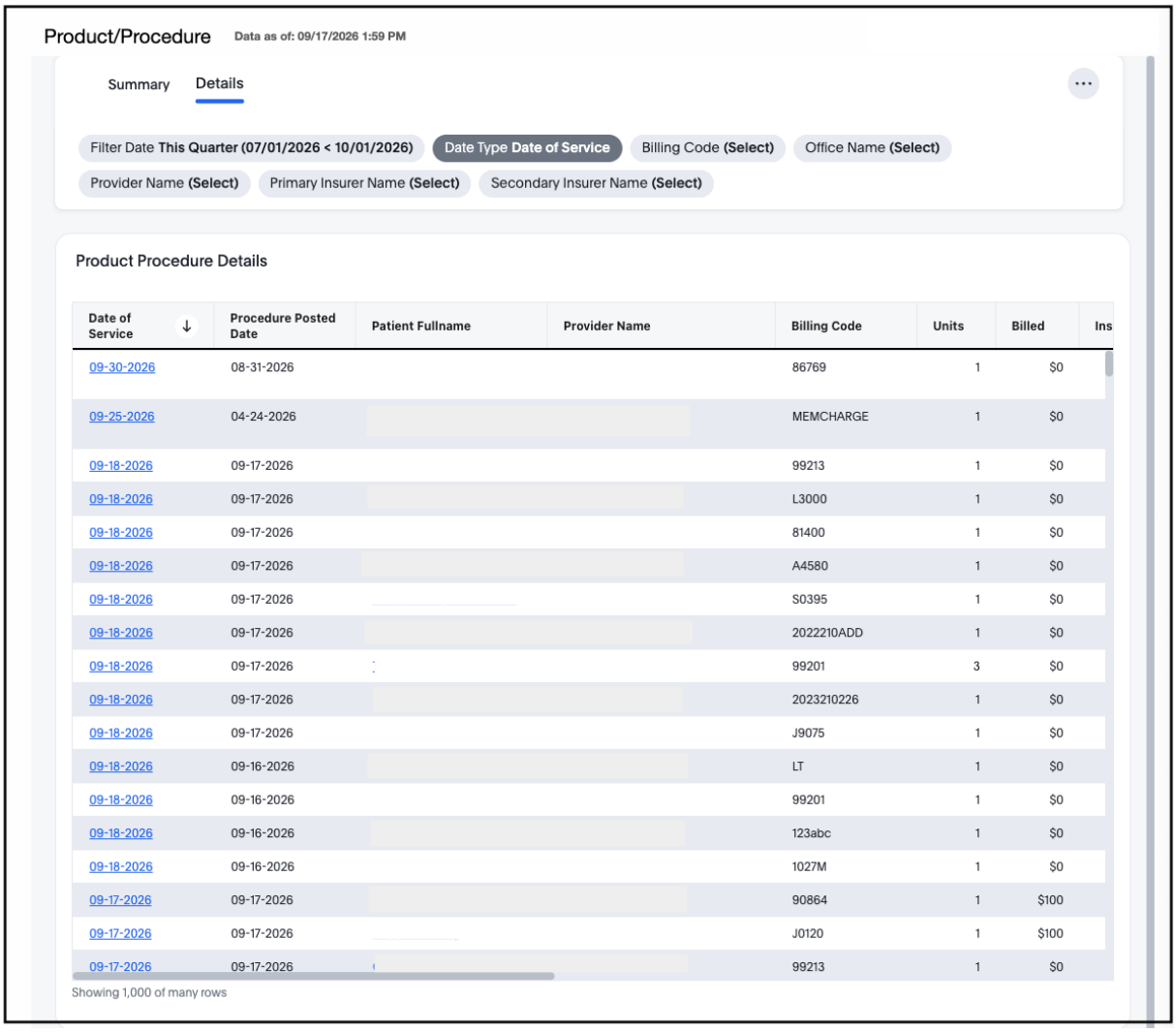
Last modified on 11/06/2026 1:57 pm EST

The Product/Procedure Report will show you what CPT/HCPCS/Custom codes have been billed throughout your practice and detailed patient information if you need to dig deeper. Offices use this report to identify their office's most-used procedures and custom codes.

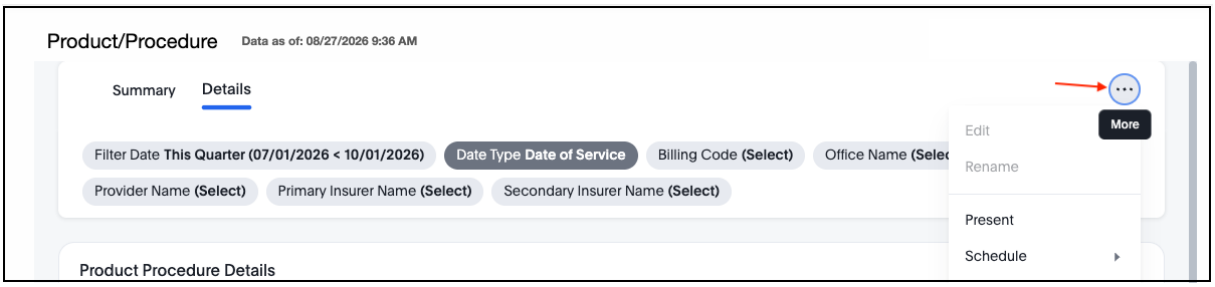
1. The Product/Procedure Report can be found by navigating to **Billing > Product/Procedure > Details tab**

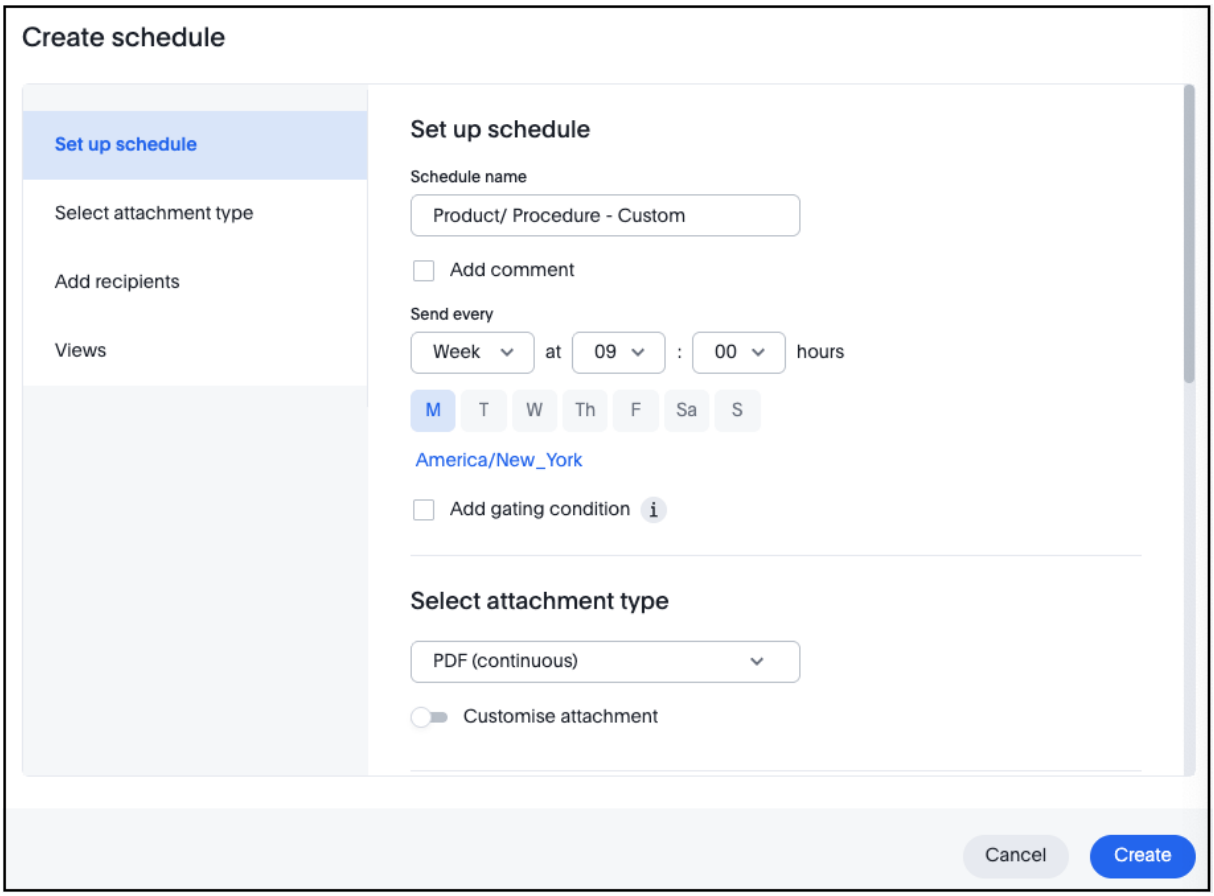


2. The Details tab will give additional information that meets the parameters selected on the Summary tab.



3. The three horizontal dots at the top right of the page will allow you to maximize the report on your screen as a presentation and schedule (or edit) the report to run on a preset schedule.




Create schedule
Set up schedule
Select attachment type
Add recipients
Views
Set up schedule
Schedule name
Product/ Procedure - Custom
Add comment
Send every
Week
at
09
:
00
hours
M
T
W
Th
F
Sa
S
America/New_York
Add gating condition
Select attachment type
PDF (continuous)
Customise attachment
Cancel
Create