

Sales

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Summary

This page documents reports from the Sales category.

Details

Within the Standard report tab, you will find the following Sales reports as shown below:

Sales

Report	Description / Function
Average Transaction Value By Invoice	Displays the Average Transaction Value by invoice on a daily basis between specified dates.
Average Transaction Value By Item	Display the Average Transaction Value by item date on a daily basis between specified dates.
Sales by Client Category	Lists the Invoice Value Summary per client category. Date Criteria: Based on invoice date Includes: Surcharges, Refunds and Credits
Sales by Client	Lists the Total Value of Sales by Client between the dates specified. Date: Item Date
Daily Average Transaction - Per Surgeon By Client	Shows the Average Transaction Value for Clients by day for each Surgeon between the specified dates. Date: Item Date Calculation: $\text{Turnover} / \text{No of Clients treated} = \text{Average Transaction Value}$
Daily Average Transaction - Per Surgeon By Patient	Shows the Average Transaction Value for Patients by day for each Surgeon between the specified dates. Date: Item Date Calculation: $\text{Turnover} / \text{No of Patients treated} = \text{Average Transaction Value}$

Daily Refunds	<p>Lists Refunds given by client and by date.</p> <p>Date Criteria: Transaction date.</p> <p>Includes: Credits, Refunds (Credit Refund).</p> <p>Excludes: Payment Return, Return Payment for Negative Balances.</p>
Income By Species	<p>Lists Total Sales by Species between dates specified</p> <p>Date Criteria: Item Date.</p> <p>Includes: Surcharges and Discounts.</p> <p>Excludes: Payments.</p> <p>'Unknown' includes: Refunds, Monetary discounts, Monetary surcharges and Counter sales.</p> <p>'No Client' includes: Counter Sales.</p>
Income Fees, Drugs & Disp Fees By Surgeon - Summary	<p>Shows Total Sales by species split into Income Fees, Drugs and Dispensing Fees as they are defined by code, by Surgeon between the dates specified.</p> <p>Date Criteria: Based on Invoice date.</p> <p>Includes: Surcharges, Discounts, Counter Sales, Refunds</p> <p>Excludes: Return Money, Payments</p> <p>'Unknown' includes: Monetary discounts and Monetary surcharges</p> <p>Note: Surcharges and Discounts applied to individual items are taken into account under the species of the animal.</p>
Income Fees, Drugs & Others By Species - Detailed	<p>Lists Total Sales by species split into fees, drugs and others as they are defined by 'Code Group' in code entry.</p> <p>Date Criteria: Based on Invoice date.</p> <p>Includes: Surcharges, Discounts, Counter Sales and Refunds</p> <p>Excludes: Return Money and Payments</p> <p>'Unknown' includes: Monetary discounts and Monetary surcharges.</p> <p>Note: Surcharges and Discounts applied to individual items are taken into account under the species of the animal.</p>
Income Fees, Drugs & Others By Species - Summary	<p>Summarised report of above.</p>
Income Fees, Drugs & Others By Treatment Code - Detailed	<p>Lists Total Sales for Income Fees, Drugs and Dispensing Fees by Treatment Code as they are defined by 'Code Group' in code entry.</p> <p>Date Criteria: Based on Invoice date.</p> <p>Includes: Surcharges, Discounts, Counter Sales and Refunds.</p> <p>Excludes: Return Money and Payments</p>
Income Fees, Drugs & Others By Treatment Code - Summary	<p>Summary report of above.</p>

Income Fees, Drugs & Others By Treatment Type - Detailed	<p>Lists detailed Income by Treatment Type split into Fees, Drugs and Others as they are defined by 'Code Group' in code entry.</p> <p>Date Criteria: Based on Invoice date.</p> <p>Includes: Surcharges, Discounts, Counter Sales and Refunds</p> <p>Excludes: Return Money and Payments</p>
Income Fees, Drugs & Others By Treatment Type- Summary	Summary report of above.
Invoice Totals	List Invoice Totals between specified values.
Sales by Patient Category - Summary	Lists total sales for Income Fees, Drugs and Dispensing Fees by Patient Category between the dates specified.
Prescription Sales	<p>Lists Prescription Sales by Surgeon between the dates specified.</p> <p>Date criteria: Item Date</p>
Sales by Code Description	<p>Lists all Sales by Code Description (Qty sold and total values) between the dates specified.</p> <p>Date criteria: Item Date</p>
Sales by Referral Practice	<p>Shows all Sales by Referral Practice between the dates specified.</p> <p>Date criteria: Item Date</p>
Sales by Surgeon	<p>Lists all Sales by Surgeon, between the invoice numbers and dates specified.</p> <p>Includes: Sales Invoices, Discounts on items, Refunds on items, Credits on items</p> <p>Excludes: Surcharges, Account activity carried out in accounts screen (not through the treatment screen), Monetary Credits and Monetary Discounts.</p>
Sales by Surgeon - Client	<p>Lists Sales by Surgeon, grouped by Client between the dates specified.</p> <p>Date criteria: Item Date</p> <p>Includes: Surcharges (in Account Items Unallocated).</p> <p>Excludes: Payments.</p> <p>'Account Items Unallocated' Includes: Counter Sales, Surcharges, Write offs, Credit 'On date range', Credit 'Monetary'.</p> <p>'Account Items Unallocated' Excludes: Credit 'List items to Credit'.</p>

Sales by Surgeon - Category	Lists Sales by Surgeon, grouped by Code Category between the dates specified. Includes: Surcharges (in Account Items Unallocated). Excludes: Payments.
Sales by Surgeon - Treatment Type	Lists Sales by Surgeon, grouped by Treatment Type between the dates specified.
Sales by Surgeon - Patient Category	Lists Sales by Surgeon, grouped by Patient Category between the dates specified. Date Criteria: Based on invoice date.
Sales by Surgeon - Patient Category Summary	Lists Sales by Surgeon, sorted by Patient Category Summary. Date Criteria: Based on invoice date.
Sales by Surgeon - Species	Lists Sales by Surgeon, sorted by Species. Date Criteria: Based on invoice date.
Sales By Surgeon - Stock Centre	Lists Sales by Surgeon, sorted by Stock Centre. Date Criteria: Based on invoice date.
Sales by Surgeon - Treatment Area	List Sales by Surgeon, sorted by Treatment Area. Date Criteria: Based on item date.
Sales by Surgeon - Daily	Lists Sales by Surgeon, sorted by day. Date Criteria: Based on item date.
Sales by Surgeon - Summary	A summary of Total Sales by Surgeon between the dates specified Date Criteria: Based on item date.
Sales by Surgeon - Summary by Region	Lists Total Sales by Surgeon grouped by Region between the dates specified. Date Criteria: Based on Item Date.
Sales by Surgeon Site - Summary	Lists Total Sales by Surgeon grouped by Site between the dates specified. Date Criteria: Based on Item Date.

Sales By Work Site - Referral Practice	<p>Lists Total Sales by Surgeon grouped by Referral Practice between the dates specified.</p> <p>Date Criteria: Based on Item Date</p>
Sales Margin - By Invoice	<p>Shows Sales (Net), Cost, Margin and Margin Percentage of Net, Net- Net, Net-Net-Net (set in Code Entry) between the dates specified and groups by Invoice No.</p> <p>Date Criteria: Based on Item Date</p> <p>This report can be formatted using criteria provided.</p>
Sales Margin - By Product/Service Code	<p>Shows Sales (Net), Cost, Margin and Margin Percentage of Net, Net-Net, Net-Net-Net from Code Entry between the dates specified and groups by Product Code on given query criteria. Sorted by Product Code.</p> <p>Date Criteria: Based on Item Date</p> <p>This report can be formatted using criteria provided.</p>
Sales Margin - By Work Site Referral Practice	<p>Shows Sales (Net), Cost, Margin and Margin Percentage of Net, Net-Net, Net-Net-Net from Code Entry between the dates specified and groups by Work Site and Referral Practice on given query criteria.</p> <p>Date Criteria: Based on Item Date</p> <p>Note: Cost value is calculated from the Net-Net-Net, if a manufacturer is not selected, then the Cost value will be 0.00.</p>
Sales Margin - Summary by Sales Category	<p>Shows Net, Cost, Margin and Margin % of Net, Net-Net, Net-Net-Net (from Code Entry) between the dates specified and groups by Sales Category/Treatment Type on given query criteria.</p> <p>Date Criteria: Based on Item Date.</p> <p>Note: This report can be formatted using criteria provided.</p>
Surgeon Work - Detailed	<p>Lists Sales and Payments Received by date for each Surgeon within the dates specified.</p> <p>Date Criteria: Based on Item Date.</p>
Surgeon Work - Detailed inc clinical	<p>Lists Sales, Clinical Notes and Payments Received by date for each Surgeon within the dates specified</p> <p>Date Criteria: Based on Item date.</p>
Surgeon Work - Summary	<p>Shows Total Sales and Payments Received for each Surgeon within the dates specified.</p> <p>Date Criteria: Based on Item date</p>

Surgeon Work - By Date	Shows Total Sales and Payments Received by date for each Surgeon within the dates specified. Date Criteria: Based on Item date
Treatment Category Summary	Shows Total Sales by Treatment Category between the dates specified. Date Criteria: Based on Item date
Treatment - Disp Fee Split	Lists Sales by Treatment Type, splitting the value by Drug and Dispensing fee values between the dates specified. Date Criteria: Based on Item date
Treatment Group Summary	Shows Total Sales by Treatment Group between the dates specified. Date Criteria: Based on Item date
Treatment Split - 1/3 Drugs and 2/3 Fees	Shows the gross value of treatments (based on multiplying Gross Value of Sales by Qty, then setting 1/3 of the value to Drugs and 2/3 of the value to Fees).
VAT by Days	Shows Total Net, VAT, and Gross figures for Sales by Date between the dates specified. Date Criteria: Based on Item date
VAT by Days - For Negative VAT	Shows Total Net, VAT, and Gross figures for Sales (with negative VAT values) between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - For Positive VAT	Shows Total Net, VAT, and Gross figures for Sales (with positive VAT values) between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - Zero Rated	Shows total Net, VAT, and Gross figures for Sales (zero rated items only) by Date between the dates specified. Date Criteria: Based on Item date
VAT by Days - All Rates - Detailed	Lists Net, VAT, and Gross figures for Sales (including zero rated items) by Date between the dates specified. Date Criteria: Based on Item date
VAT by Days - Cash Accounting	Lists Payment Net and VAT breakdown for payments made between the dates specified. Date Criteria: Based on Payment Date

VAT by Days - Detailed	Lists Net, VAT, and Gross figures for Sales between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - Detailed - For Negative VAT	Lists Net, VAT, and Gross figures for Sales (with negative VAT values) between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - Detailed - For Positive VAT	Lists Net, VAT, and Gross figures for Sales (with positive VAT values) between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - Detailed - Zero Rated	Lists Net, VAT, and Gross figures for Sales (zero rated items only) by Date between the dates specified. Date Criteria: Based on Item date
VAT by Days - All Rates	Lists Net, VAT, and Gross figures for Sales (with positive VAT values) between the dates specified by date. Date Criteria: Based on Item date
VAT by Days - Invoice/Item Date Deviation	Lists Net, VAT, and Gross figures for Sales (that have an invoice date more than 1 day different to item date). between the dates specified by date. Date Criteria: Based on Item date
Work in Progress	Lists items that have not been invoiced (in treatment draft or pre-invoice) between the dates specified. Date Criteria: Based on Item date