Audit

10/09/2024 2:51 pm BST

Summary

This page documents the Audit category.

Details

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

Audit

Report	Description / Function
Appointment Status Audit	Lists all appointment status changes made between the dates specified.
Treatment with Payment Allocation Analysis	Lists all Treatment Items with the amount of payment allocated against each. Date: Item Date **Excludes:** Clinical notes, documents, lab and weight records.
Audit Pay Treat Only Analysis	Shows each treatment item with allocated payment. **Excludes:** Payments allocated against Opening Balances. **Excludes:** Monetary credits/discounts/refunds. **Excludes**: Clinical, documents, lab and weight records. **Includes:** Refunds, credits, discounts allocated against items
Clients with No Accounts Category	Lists any Clients that do not have an accounts category assigned in additional info tab. Date Criteria: Based on registered date of the clients record.

Deleted Appointments	Shows Deleted Appointments with client information, appointment information, deleted date and deleted by. Date Criteria: Based on date appointment was deleted.
Deactivated Clients	Shows Deactivated Clients with client information, deactivated date and deactivated by. Date Criteria: Based on date client was deactivated.
Unsaved Draft Items	Lists any clients with treatment items that remain in draft and have not been saved to history, estimate or invoice. Date Criteria: Item date of the item in draft.
Deleted Payments	Lists payments which have been deleted within the dates specified. Date Criteria: Deleted Date
Stock Audit	Shows an audit of Stock in and out for item's specified. Can be filtered by branch and legal category. Date Criteria: Sold Date is based on Item Date
Stock Level Audit	Shows an audit of the Stock Level configuration for each stock item. Including any changes made to the Stock Adjustment screen within the date range specified. Date Criteria: Modified Date
Deleted Surcharges	Lists all surcharges that have been deleted between specified dates. Date Criteria: Date of deletion.

Treatments with Discounts Applied	Lists all Treatment Codes in Code Entry with a Discount applied. Shows each code, the discount type applied and discount amount for that discount type.
Deleted Treatments	Lists all treatments that have been deleted between specified dates. Date Criteria: Date of deletion.
Treatment Items Audit Run	Lists sales based on the date added, it also shows any deletion history for items listed. Date Criteria: Sold Date is based on Item Date