

# 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	<p>Lists the Invoice Value Summary per client category.</p> <p>Date Criteria: Based on invoice date</p> <p><b>Includes:</b> Surcharges, Refunds and Credits</p>
Sales by Client	<p>Lists the Total Value of Sales by Client between the dates specified.</p> <p>Date: Item Date</p>
Daily Average Transaction - Per Surgeon By Client	<p>Shows the Average Transaction Value for Clients by day for each Surgeon between the specified dates.</p> <p>Date: Item Date</p> <p>Calculation: <math>\text{Turnover} / \text{No of Clients treated} = \text{Average Transaction Value}</math></p>

Daily Average Transaction - Per Surgeon By Patient	<p>Shows the Average Transaction Value for Patients by day for each Surgeon between the specified dates.</p> <p>Date: Item Date</p> <p>Calculation: <math>\text{Turnover/No of Patients treated} = \text{Average Transaction Value}</math></p>
Daily Refunds	<p>Lists Refunds given by client and by date.</p> <p>Date Criteria: Transaction date.</p> <p><b>Includes:</b> Credits, Refunds (Credit Refund).</p> <p><b>Excludes:</b> 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><b>Includes:</b> Surcharges and Discounts.</p> <p><b>Excludes:</b> 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><b>Includes:</b> Surcharges, Discounts, Counter Sales, Refunds</p> <p><b>Excludes:</b> 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><b>Includes:</b> Surcharges, Discounts, Counter Sales and Refunds</p> <p><b>Excludes:</b> 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	Summarised report of above.
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><b>Includes:</b> Surcharges, Discounts, Counter Sales and Refunds.</p> <p><b>Excludes:</b> Return Money and Payments</p>
Income Fees, Drugs & Others By Treatment Code - Summary	Summary report of above.
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><b>Includes:</b> Surcharges, Discounts, Counter Sales and Refunds</p> <p><b>Excludes:</b> 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	Lists Prescription Sales by Surgeon between the dates specified.  Date criteria: Item Date
Sales by Code Description	Lists all Sales by Code Description (Qty sold and total values) between the dates specified.  Date criteria: Item Date
Sales by Referral Practice	Shows all Sales by Referral Practice between the dates specified.  Date criteria: Item Date
Sales by Surgeon	Lists all Sales by Surgeon, between the invoice numbers and dates specified.  <b>Includes:</b> Sales Invoices, Discounts on items, Refunds on items, Credits on items  <b>Excludes:</b> Surcharges, Account activity carried out in accounts screen (not through the treatment screen), Monetary Credits and Monetary Discounts.

Sales by Surgeon - Client	<p>Lists Sales by Surgeon, grouped by Client between the dates specified.</p> <p>Date criteria: Item Date</p> <p><b>Includes:</b> Surcharges (in Account Items Unallocated).</p> <p><b>Excludes:</b> Payments.</p> <p><b>'Account Items Unallocated' Includes:</b> Counter Sales, Surcharges, Write offs, Credit 'On date range', Credit 'Monetary'.</p> <p><b>'Account Items Unallocated' Excludes:</b> Credit 'List items to Credit'.</p>
Sales by Surgeon - Category	<p>Lists Sales by Surgeon, grouped by Code Category between the dates specified.</p> <p><b>Includes:</b> Surcharges (in Account Items Unallocated).</p> <p><b>Excludes:</b> Payments.</p>
Sales by Surgeon - Treatment Type	<p>Lists Sales by Surgeon, grouped by Treatment Type between the dates specified.</p>
Sales by Surgeon - Patient Category	<p>Lists Sales by Surgeon, grouped by Patient Category between the dates specified.</p> <p>Date Criteria: Based on invoice date.</p>
Sales by Surgeon - Patient Category Summary	<p>Lists Sales by Surgeon, sorted by Patient Category Summary.</p> <p>Date Criteria: Based on invoice date.</p>
Sales by Surgeon - Species	<p>Lists Sales by Surgeon, sorted by Species.</p> <p>Date Criteria: Based on invoice date.</p>

Sales By Surgeon - Stock Centre	<p>Lists Sales by Surgeon, sorted by Stock Centre.</p> <p>Date Criteria: Based on invoice date.</p>
Sales by Surgeon - Treatment Area	<p>List Sales by Surgeon, sorted by Treatment Area.</p> <p>Date Criteria: Based on item date.</p>
Sales by Surgeon - Daily	<p>Lists Sales by Surgeon, sorted by day.</p> <p>Date Criteria: Based on item date.</p>
Sales by Surgeon - Summary	<p>A summary of Total Sales by Surgeon between the dates specified</p> <p>Date Criteria: Based on item date.</p>
Sales by Surgeon - Summary by Region	<p>Lists Total Sales by Surgeon grouped by Region between the dates specified.</p> <p>Date Criteria: Based on Item Date.</p>
Sales by Surgeon Site - Summary	<p>Lists Total Sales by Surgeon grouped by Site between the dates specified.</p> <p>Date Criteria: Based on Item Date.</p>
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	<p>Shows Total Sales and Payments Received by date for each Surgeon within the dates specified.</p> <p>Date Criteria: Based on Item date</p>
Treatment Category Summary	<p>Shows Total Sales by Treatment Category between the dates specified.</p> <p>Date Criteria: Based on Item date</p>
Treatment - Disp Fee Split	<p>Lists Sales by Treatment Type, splitting the value by Drug and Dispensing fee values between the dates specified.</p> <p>Date Criteria: Based on Item date</p>
Treatment Group Summary	<p>Shows Total Sales by Treatment Group between the dates specified.</p> <p>Date Criteria: Based on Item date</p>
Treatment Split - 1/3 Drugs and 2/3 Fees	<p>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).</p>
VAT by Days	<p>Shows Total Net, VAT, and Gross figures for Sales by Date between the dates specified.</p> <p>Date Criteria: Based on Item date</p>



VAT by Days - For Negative VAT	<p>Shows Total Net, VAT, and Gross figures for Sales (with negative VAT values) between the dates specified by date.</p> <p>Date Criteria: Based on Item date</p>
VAT by Days - For Positive VAT	<p>Shows Total Net, VAT, and Gross figures for Sales (with positive VAT values) between the dates specified by date.</p> <p>Date Criteria: Based on Item date</p>
VAT by Days - Zero Rated	<p>Shows total Net, VAT, and Gross figures for Sales (zero rated items only) by Date between the dates specified.</p> <p>Date Criteria: Based on Item date</p>
VAT by Days - All Rates - Detailed	<p>Lists Net, VAT, and Gross figures for Sales (including zero rated items) by Date between the dates specified.</p> <p>Date Criteria: Based on Item date</p>
VAT by Days - Cash Accounting	<p>Lists Payment Net and VAT breakdown for payments made between the dates specified.</p> <p>Date Criteria: Based on Payment Date</p>
VAT by Days - Detailed	<p>Lists Net, VAT, and Gross figures for Sales between the dates specified by date.</p> <p>Date Criteria: Based on Item date</p>
VAT by Days - Detailed - For Negative VAT	<p>Lists Net, VAT, and Gross figures for Sales (with negative VAT values) between the dates specified by date.</p> <p>Date Criteria: Based on Item date</p>

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