

AVImark Guide for Running Service Reports

This reference guide includes a few tips for generating a report in your AVImark practice management software that tells us how many times each service was offered during a set timeframe.

Using End of Period Reports

- 1) Open AVImark.
- 2) Go to Work With > Reports
- 3) Select Period to be "Year"
- 4) Select proper date range.
- 5) Change the Doctor selection to "Consolidated"
- 6) Be sure to mark the Preview box.
- 7) Under PRINT THESE be sure that only Income by Treatment is selected.
- 8) Click Print, the report should display in the Report Preview box.
- 9) Click on File>Save As.
- 10) Save in your Profit Solver Folder as a pdf and email to your consultant.

End of Period Reports (Printing...)

Print by

Period Year Doctor Consolidated Sort by Name

Start 01/01/2014 Print To Officejet 6000 E609a Series Report code

End 12/31/2014 Preview Company Client code

Site 0

PRINT THESE... Save

Income by Treatment

DON'T PRINT THESE...

Account Summary
Audit Trail
Commission Report
Controlled Substance
Deposit Slip
Held check Report
Income by Company
Income by Plan Activity
Income by Provider
Inventory Used
Open Invoices
Patients by Treatment
Payment Summary
Period Totals
Rabies Report
Recurring Payment
Referral Report
Sales Summary
Tax By Area
Transaction Journal
Transaction Summary
Treatment Control Log

Bottom line Income options

CHARGES

Treatments
Inventory
Adjustments
Sales tax
Late fees

PAYMENTS

Cash
Checks
Held checks
Mastercard
Visa
Discover
Am Express
Debit
All others

Print Close ? Help Bottom line

Alternative Method - AVImark Instructions for Common Services

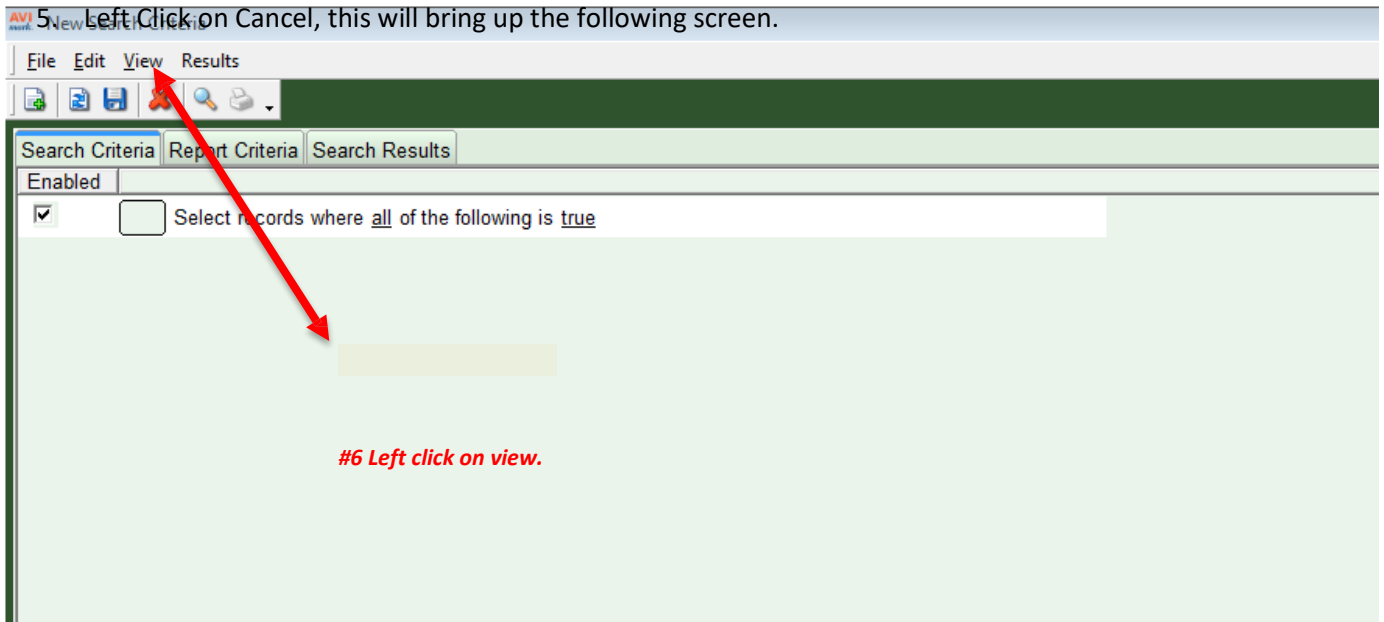
For Youtube video click here https://youtu.be/gJ_jCklbIFc

1. Highlight the Information Search Code Editor below:

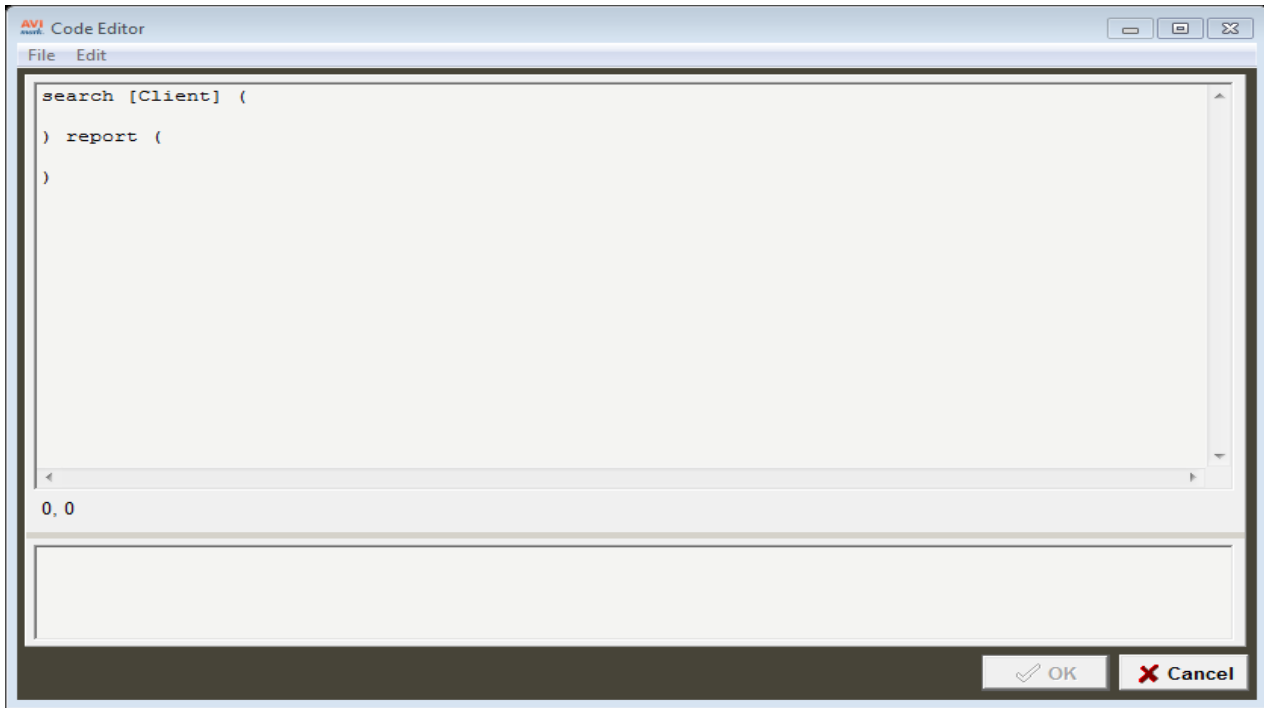
```
search [Client] (  
  [History-Treatment] is true and  
  [History-Date] is between '01-01-2017' '12/31/2017'  
) report (  
  [History-Code],  
  [History-Description],  
  [History-Code] caption '# of Times Used' summary (count),  
  PropPath(History-Treatment-CalculatedPrice),  
  [History-Quantity] summary (sum)  
) sort by (2 descending, 0 ascending) summarize by (0)
```

2. Right click on the highlighted information and then left click Copy.
3. Open AVImark
4. Go to Work with.....Information Search

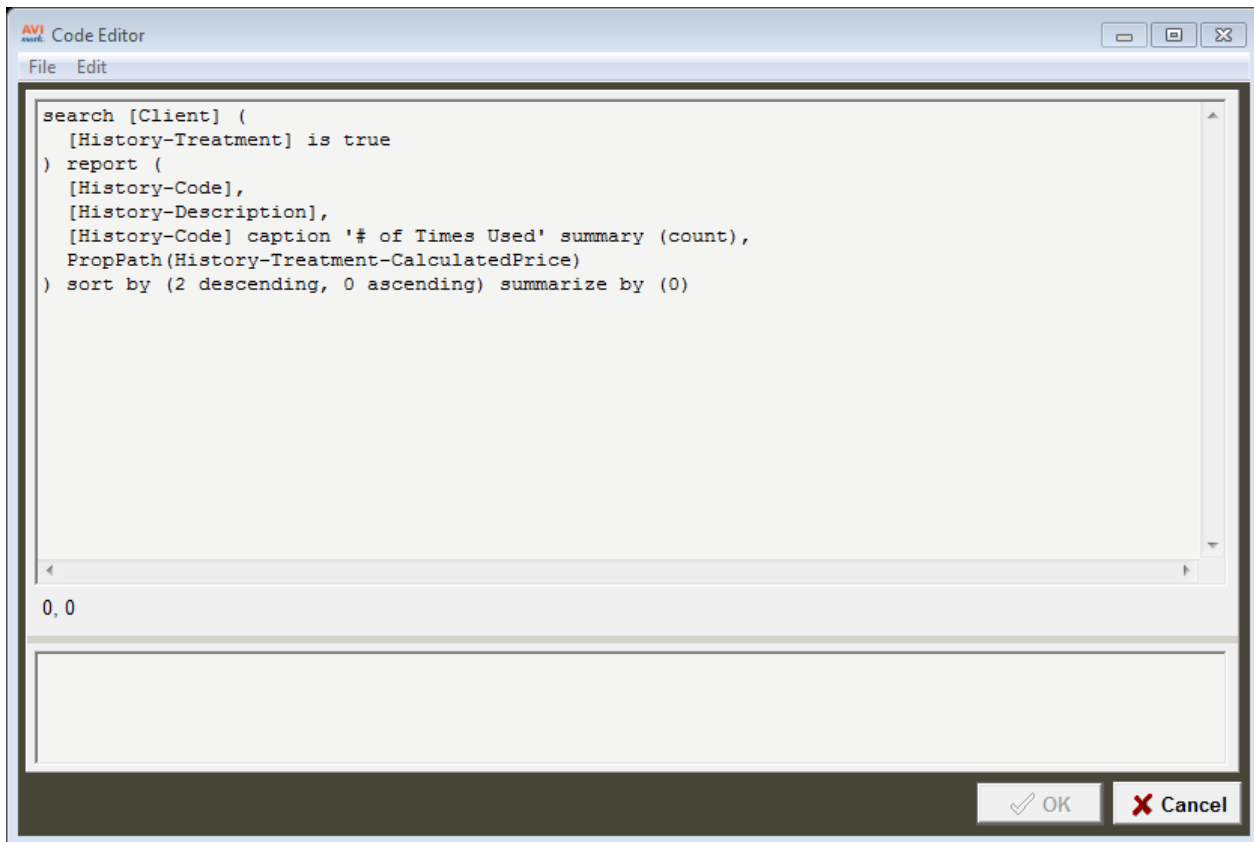
5. Left Click on Cancel, this will bring up the following screen.



6. Go to View, left click.
7. Left click Code Editor

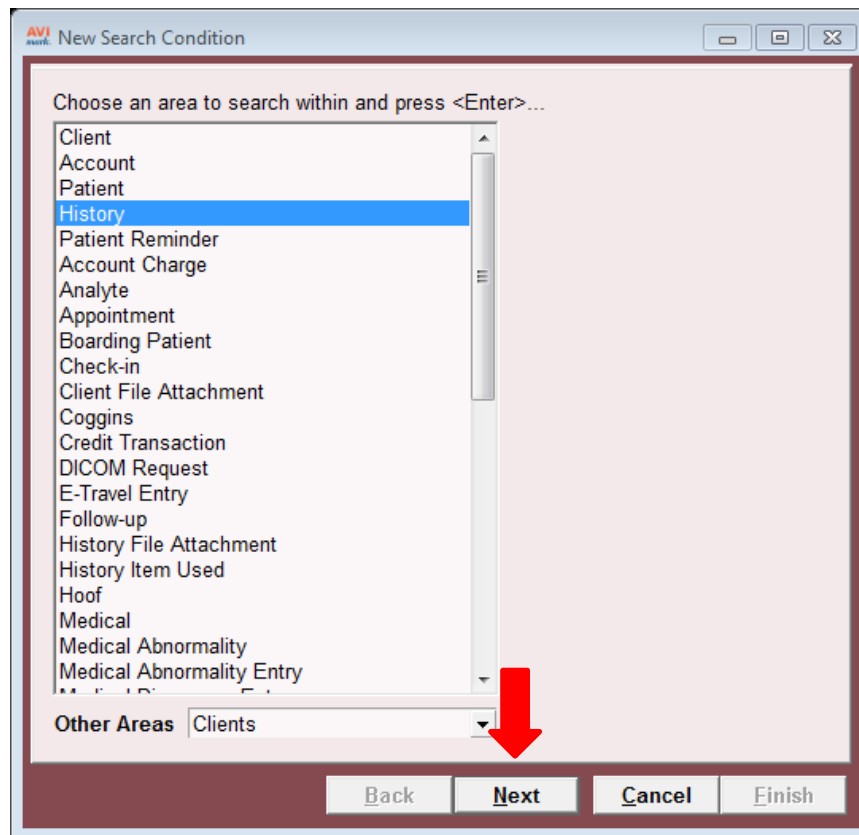


8. Highlight all the information displayed in the Code Editor box
9. Right click Paste, to paste the Information Search Code from above

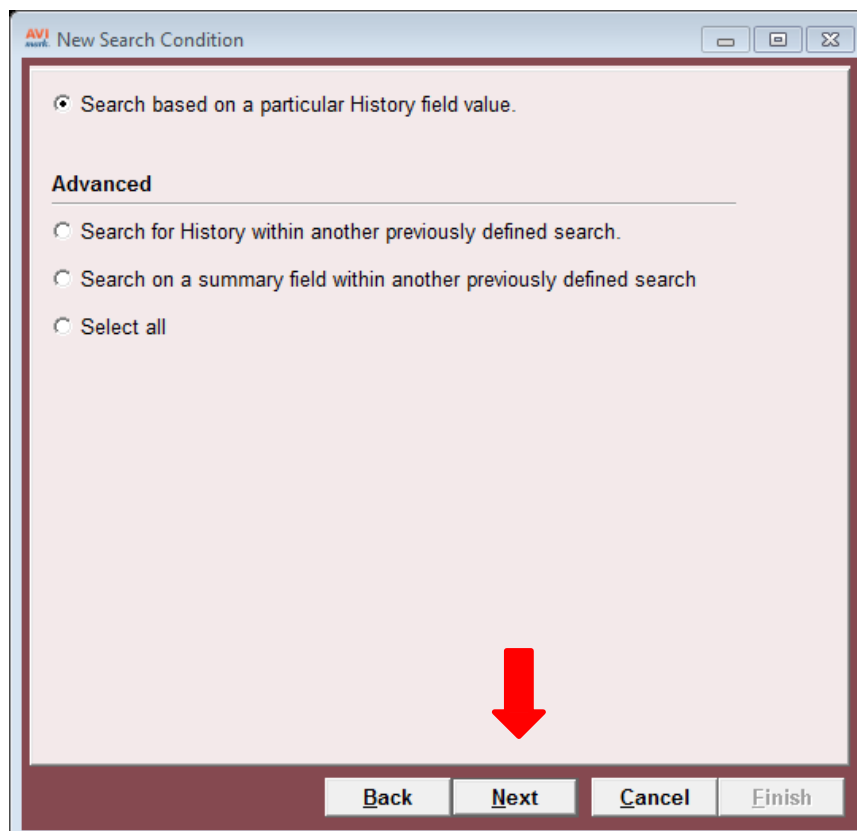


10. Click OK
11. You may be asked if you want to add this search to your database, say 'Yes'

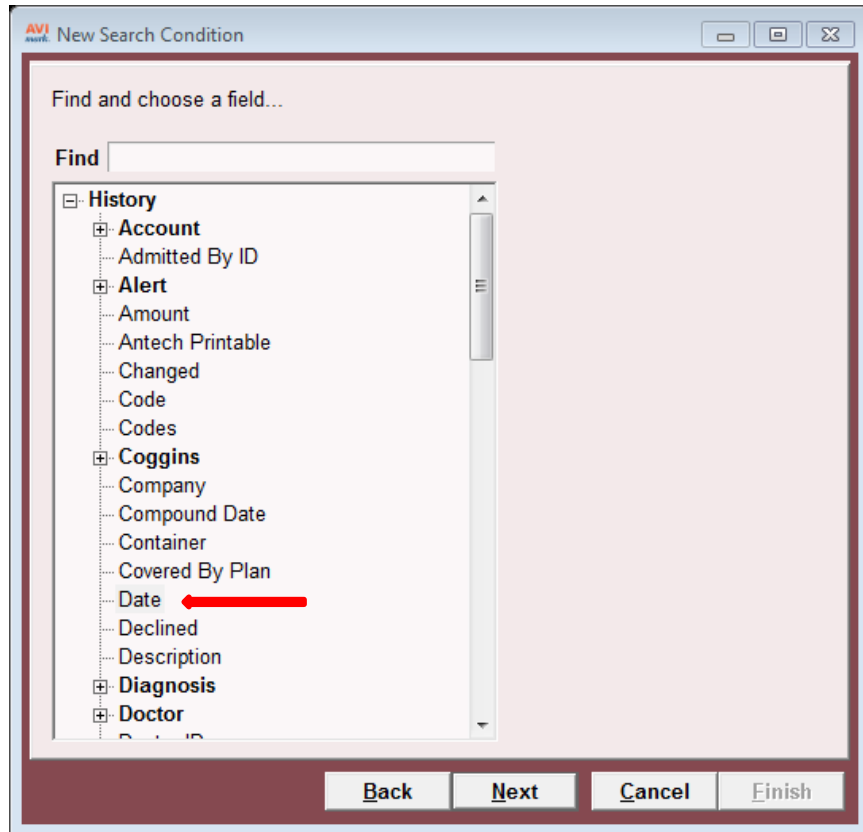
12. On Search Criteria screen, right click and select 'New Condition' to add the dates you want to search.
13. Select History, click 'Next'.



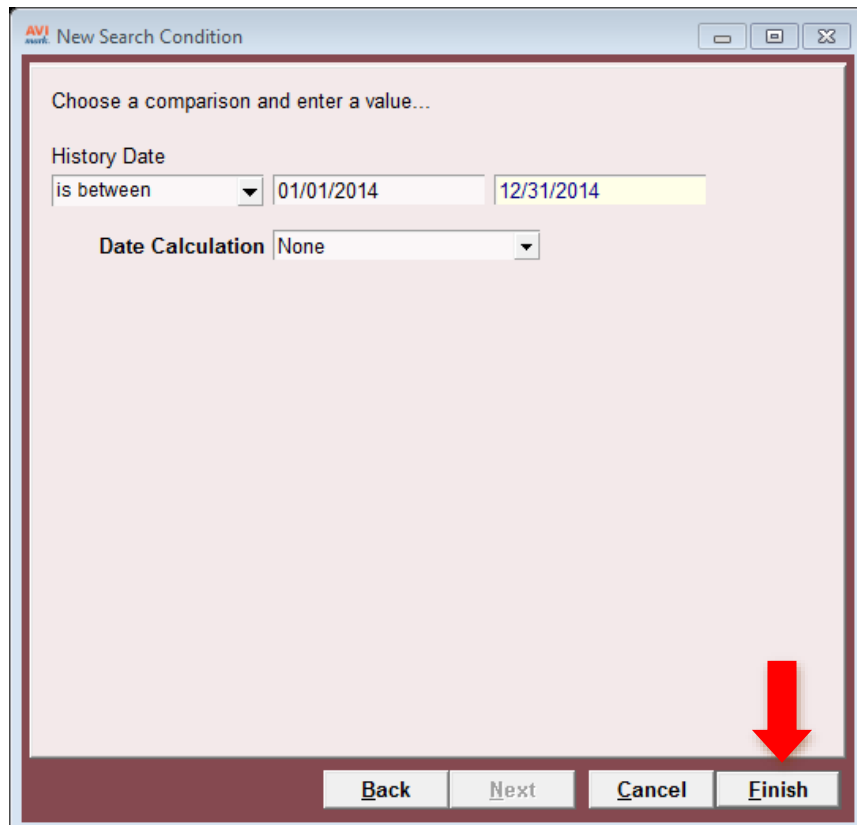
14. Click 'Next'.



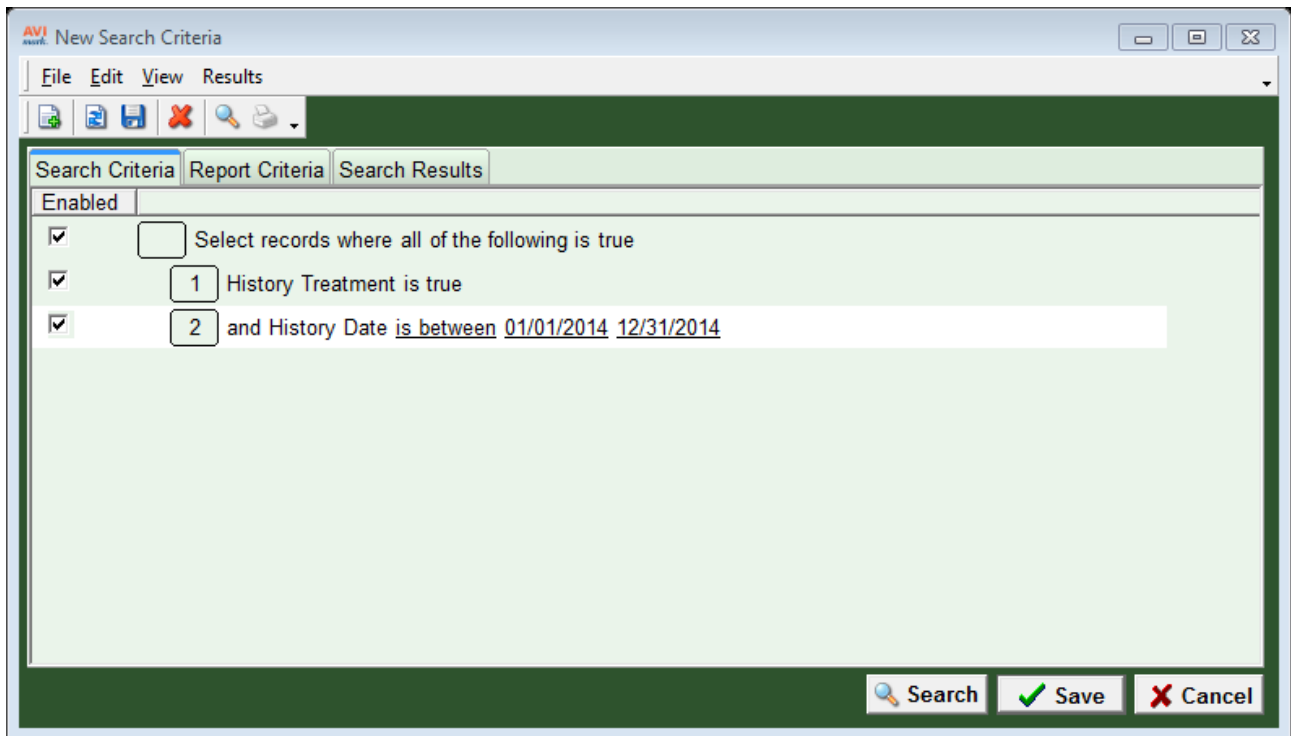
15. Select 'Date', and click 'Next'.



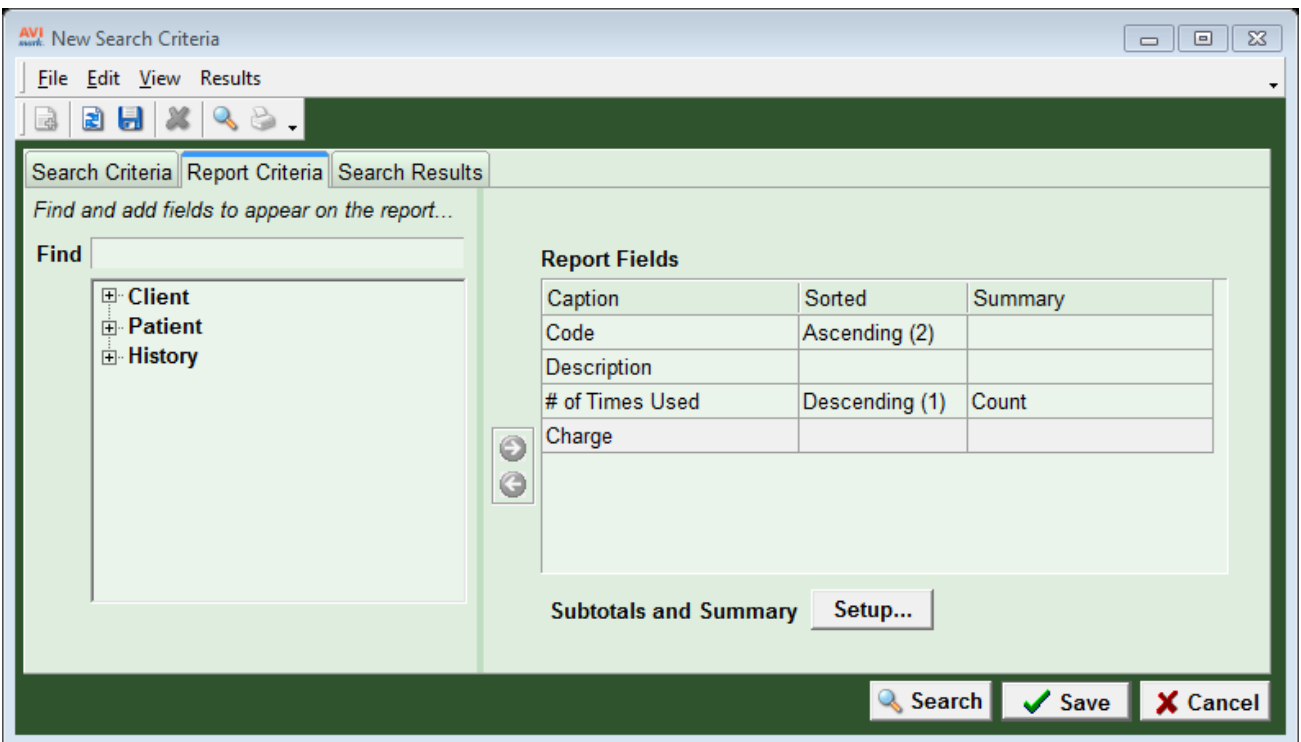
16. In the drop down menu select 'is between' and type in the date range for the report. Click finish.



17. The Search Criteria tab should look like this (dates may be different).

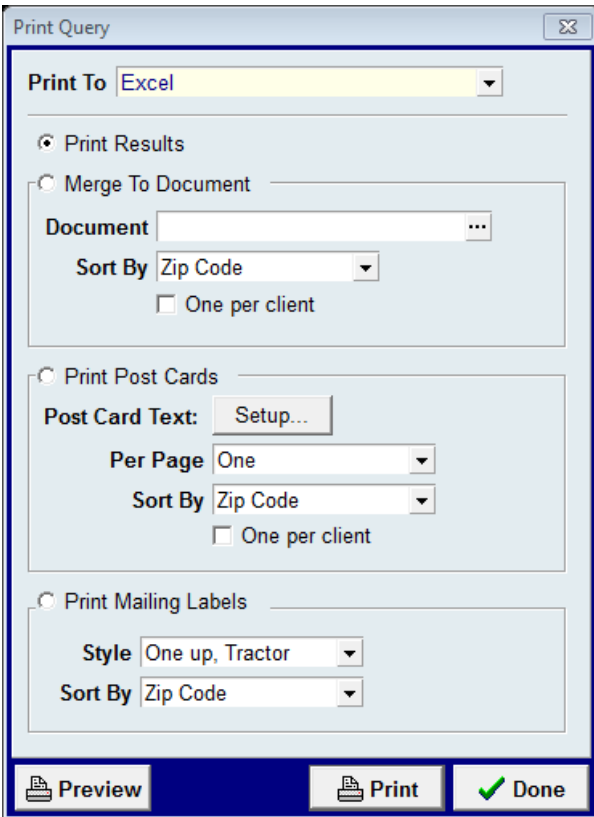


18. The Report Criteria tab should look like this.



19. Click on the Search button on the bottom right of the screen.

20. If satisfied, go to Results Tab select Print. Click on the drop down arrow for “Print To”. Scroll to the bottom and select “Excel”.



21. Save in your Profit Solver Folder or a folder where you can find the file

22. Don't forget to save your search

25. e-mail to your consultant.