

IMPROMED/IMPROMED EQUINE FAQ

MOST REQUESTED REPORTS

• REPORTS

- I need to find most products sold.
 - Business, Reports, Product Reports, Product Analysis, export and sort
- I need a report that shows total production, revenue and income
 - Business, Reports, Financial Reports, Summary Report
- I need a report that shows total production by Category
 - Business, Reports, Product Reports, Product Category Totals
- I need a report that shows total production per Employee in Quantity, Gross and % of Gross
 - Business, Reports, Employee Reports, Employee Summary
- I need a report that shows total production per Employee showing Net Income
 - Business, Reports, Employee Reports, Employee Net Report
- I need to do a count of inventory on the shelf
 - Business, Reports, Inventory Reports, Inventory Count Sheet
 - Business, Reports, Setup Reports, Setup Inventory Reports, Inventory Item Listing
- I need a report that shows the prices of all of my products
 - Business, Reports, Setup Reports, Setup Product Reports, Price Listing Report
 - Business, Reports, Setup Reports, Setup Product Reports, Product Listing Report
- I need a report that shows inventory markup
 - Business, Reports, Setup Reports, Setup Product Reports, Product Details Report
- I need a report that shows my total inventory at the end of the year
 - Business, Reports, Inventory Reports, Inventory Category Totals *(this is a LIVE total, must print right after last transaction for the end of year and before the first transaction for the new year for accuracy)*
- I need a report that show my total Cost of Goods Sold
 - Business, Reports, Inventory Reports, Inventory Category Totals
- I need a report that shows products still stored, not concluded.
 - Business, Reports, Product Reports, Products Stored (Open Invoices)
- I need the AR total on account at the end of the year
 - Business, Reports, Accounts Receivable Reports, Summary Aged Trial Balance
- I need a report that shows the customer's transactions and total sales for the year.
 - Business, Reports, Product Reports, Products Invoiced by Client
- I did not close out my year so I can't do my YTD search for Sales YTD. Is there a report I can use?
 - Business, Reports, Product Reports, Product Analysis Report
 - Business, Reports, Product Reports, Products Invoiced
 - Business, Reports, Product Reports, Products Invoiced by Client
- I need a Report for an Audit that Shows All Invoices Completed Within a Year or Given Time Frame
 - Business, Reports, Product Reports, Products Invoiced by Client
- End of year procedure was not done in past years, but needs to find out their best customers for the year by dollars spent.
 - Business, Reports, Client/Patient Database Reports, Client Revenue Reports – recommend to preview before printing.

• ENHANCED REPORTS

- I want to know what products sold the most.
 - Top Products Sold by Instance (instance = number of times the products were invoiced)
 - Top Products Sold by Net
 - Top Products Sold by Quantity
 - Top Products Sold by Revenue
- I want to know Total Revenue for all clients who have a first visit date of the year selected

- Total Revenue of New Clients per Year
- I want to know the total revenue for all clients for a year who also had a visit in the prior year
 - Total Revenue of Returning Clients per Year
- I want to know the total revenue of all clients who have visited more than once during the same year.
 - Total Revenue of Repeat Clients per Year
- I need year-to-date totals for all clients or a specific client within a selected year
 - *YTD Totals for All Clients in a Specific Year
 - *YTD Totals for a Specific Client and Year
 - ***Report will only return valid information if the Year End Tool was run at the end of the year**
- I need a report that shows the product cost, not the base cost.
 - Inventory Category Details

- **PRICING**

- End of Year Price Increases (Setup, Product Spreadsheet)
 - Price Change Draft is only available starting with 5.2 sr3, 3.2 sr3
 - It is important to understand how to use the Product Spreadsheet. **If you are not familiar, stop!**
Email Support@Impromed.com to request help.
- End of Year Tax Increases (Setup, Patient Processing, Tax)
 - will not include stored products/products currently in estimates