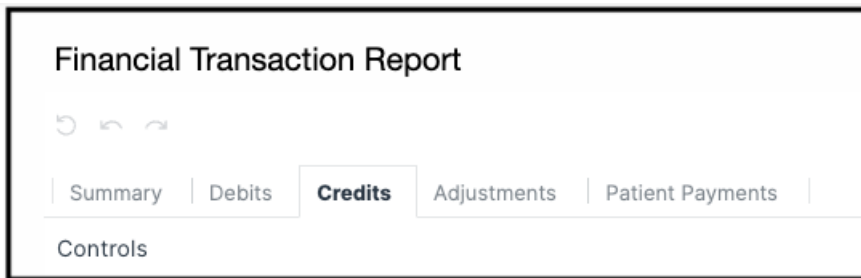# Financial Transactions (fka Day Sheet) Updates: Credits tab
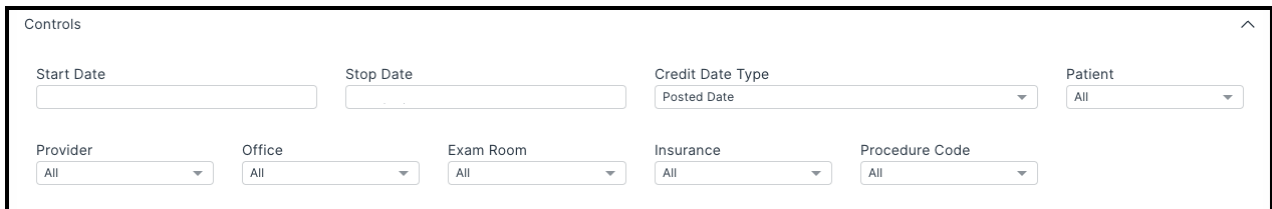
07/24/2024 2:40 pm EDT

The third tab listed under the Day Sheet is the Credits tab. Here is where you can see payments added for the parameters you set.
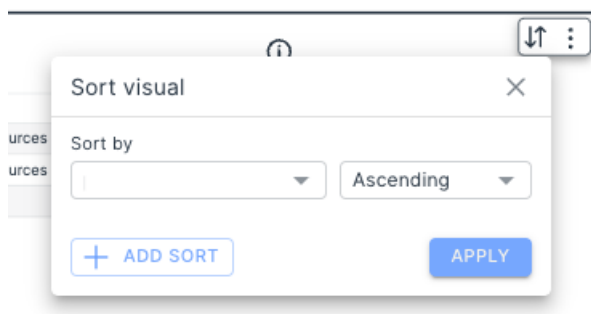

The controls available include:

- Start Date
- Stop Date
- Credit Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code

Once you have set your parameters, the report will populate. You can use the up/down arrow on the right side to sort the information in numerous ways.

You can also export the report to CSV or Excel by clicking the 3 vertical dots. The report will be generated and available in your message center.

Menu options

Unpin totals
Export to CSV
Export to Excel