

# Complete set of End Of Year documents for DVMax 6.6

ID: 234

Author: Sean

Topic:

Current Owner: Sean

Current State: Draft

Last Modified: 11/18/2004 2:31 PM

## ENVIRONMENT

## REFERENCE

This document is a compilation of all End Of Year documents typically required for DVMax 6.6 users. Each document has it's own ID and can be accessed using this ID individually.

Note: This document is several pages in length, please insure that all pages are examined.

## ATTACHMENTS

# Inventory Value Report in ALL versions of DVMax

ID: 229

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:54 PM

## ENVIRONMENT

This section is designed to assist in the printing of an 'Inventory Net Value' report. This report MUST be performed at the end of the year. It should be noted that the information we will be requesting is for an entire year.

## REFERENCE

Note: This report should only be printed if the Inventory section is used in your practice.

Obtaining the report

1. Select 'Inventory Management' from the 'Section' menu.
2. Click the 'All Records' button.
3. Click the 'File' menu & select 'Print'
4. From the list choose 'Net Value' & print.

## ATTACHMENTS

# Sales Tax Charged Report in DVMax 6.6

ID: 225

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:31 PM

## ENVIRONMENT

This report is applicable to DVMax 6.6 versions only.

## REFERENCE

This document is designed to assist in the printing of a Sales Tax Charged Out Report. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

Note: This report can be run after the year-ends.

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Click on the 'Taxes' folder tab.
3. Choose 'Sales Tax Charged Out' & choose 'OK'.
4. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date. Leave the starting time at '00:00:00' and the ending time at '23:59:59'.
5. Click 'OK'.

## ATTACHMENTS

# Accounts Receivable report in DVMax 6.6

ID: 226

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:42 PM

## ENVIRONMENT

This document is designed to assist in the printing of an Accounts Receivable report.

NOTE: This report MUST be performed at the end of the year. It should be noted that the information we will be requesting is for an entire year.

## REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Click on the 'Invoices & Receivables' folder tab.
3. Choose 'Print Receivables Reports' and click 'OK'
4. Select the 'Totals only' option and click 'OK'. If you pay providers based on production, then repeat step 3 above and select and print the 'Provider Breakdown' report as well.

## ATTACHMENTS

# Year End Income Summary / Detailed Sales Report in DVMax 6.6

ID: 227

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:49 PM

## ENVIRONMENT

This document is designed to assist in the printing of a 'Category' type 'Detailed Sales Report' for calculating a summary year end income. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

## REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu
2. Choose 'Detailed Sales Report' & choose 'OK'
3. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date.
4. Select the 'Category' option & choose 'OK'

## ATTACHMENTS

# Average Invoice per Doctor Report in DVMax 6.6

ID: 228

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:51 PM

## ENVIRONMENT

This document is designed to assist in the printing of an Average Invoice per Doctor Report. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

Note: This report can be run after the year-ends.

## REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Choose 'Average Invoice per Doctor Report' & choose 'OK'.
3. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date.
4. Click 'OK'.

## ATTACHMENTS

# Updating Spent Year to Date (YTD) Field in DVMax 6.6

ID: 230

Author: Sean

Topic: End Of Year

Current Owner: Sean

Current State: Approved

Last Modified: 11/17/2004 3:57 PM

## ENVIRONMENT

IMPORTANT: This procedure should be run after all other end of year procedures.

This document is designed to assist in updating the 'spent year to date' field on all client records back to zero.

## REFERENCE

Note: This action should be performed on or near the first day of the year.

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Click on the 'Utilities' folder tab.
3. Choose 'Special Routines' & choose 'OK'.
4. Select the 'Annual update of the spent YTD field' & choose 'OK'.
5. Follow the screen prompts.

## ATTACHMENTS