TOMS Reports — Practice Manual

Stock, financial, patient and SMS reporting

A walk-through for practice managers, accountants and front-of-house covering the reports built into TOMS. Reports sit under **Clinical** → **Reporting** and split into five categories — **Stock**, **Patient Tracking**, **Financial**, **Patient** and **SMS Tracking**. Each report opens a small wizard that asks for the date range (and any other inputs it needs), then produces a PDF, an XLS file or a clickable analysis view.

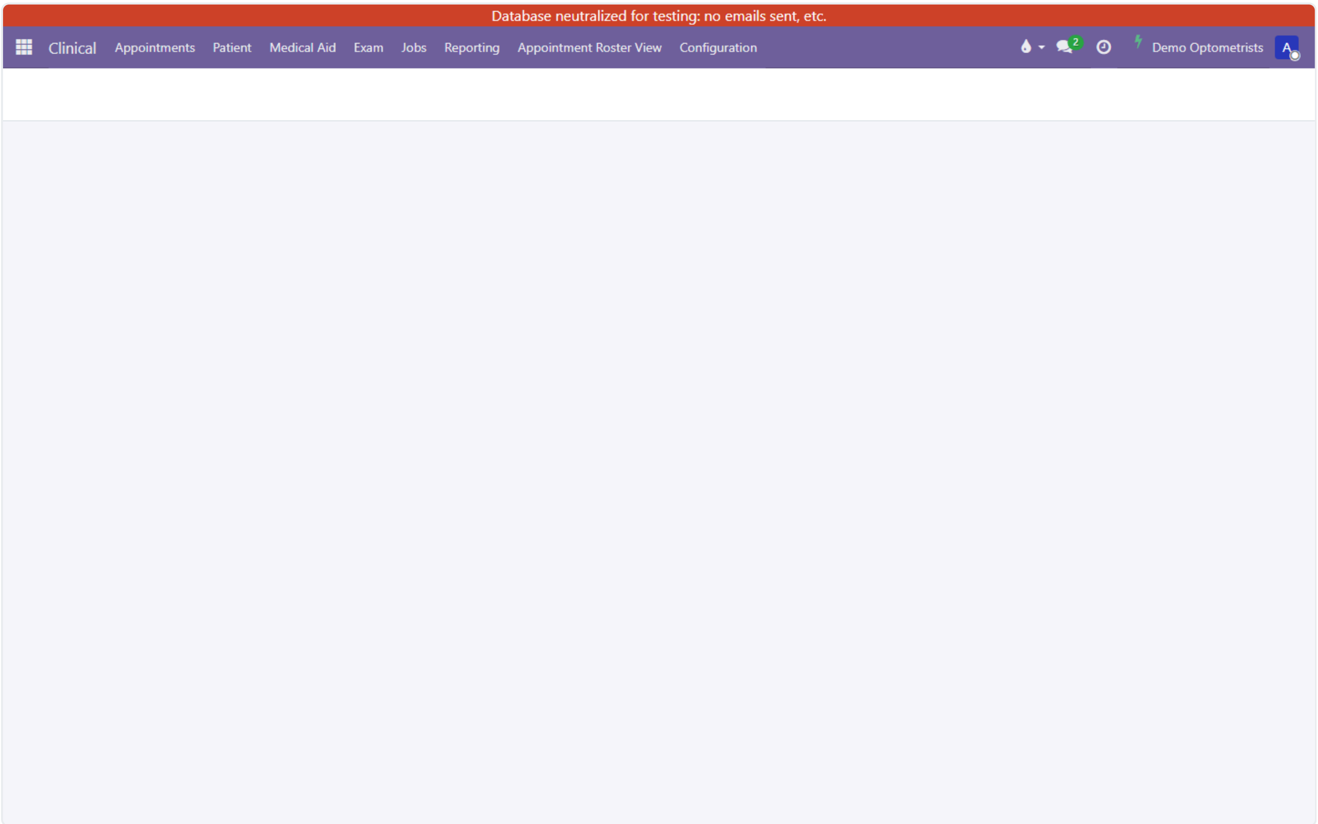
> **A note on what's not here.** TOMS has 30+ canned reports. This document covers the ones front desk and accounts reach for most often, plus one example from each category so the wizard pattern is familiar. Less-used reports follow the same flow — open the menu, fill the dates, click **Print** or **Export**.

At a glance — the report categories

Category	What it answers	Typical users
Stock Reports	What's in the shop and what was sold	Practice manager, owner
Patient Tracking	Who is on file, who's overdue for recall	Reception, marketing
Financial Reports	What was billed and what was paid	Accountant, owner
Patient Reports	Outliers in the patient database (dormant accounts, postal-only)	Practice manager
SMS Tracking	Which SMS messages went out and which bounced	Reception, marketing

1. Sign in

Sign in to TOMS. The reports live under **Clinical** → **Reporting**. Open the **Reporting** menu in the Clinical menu bar at the top of the page to expand the dropdown; every report in the practice is grouped into one of five categories underneath.

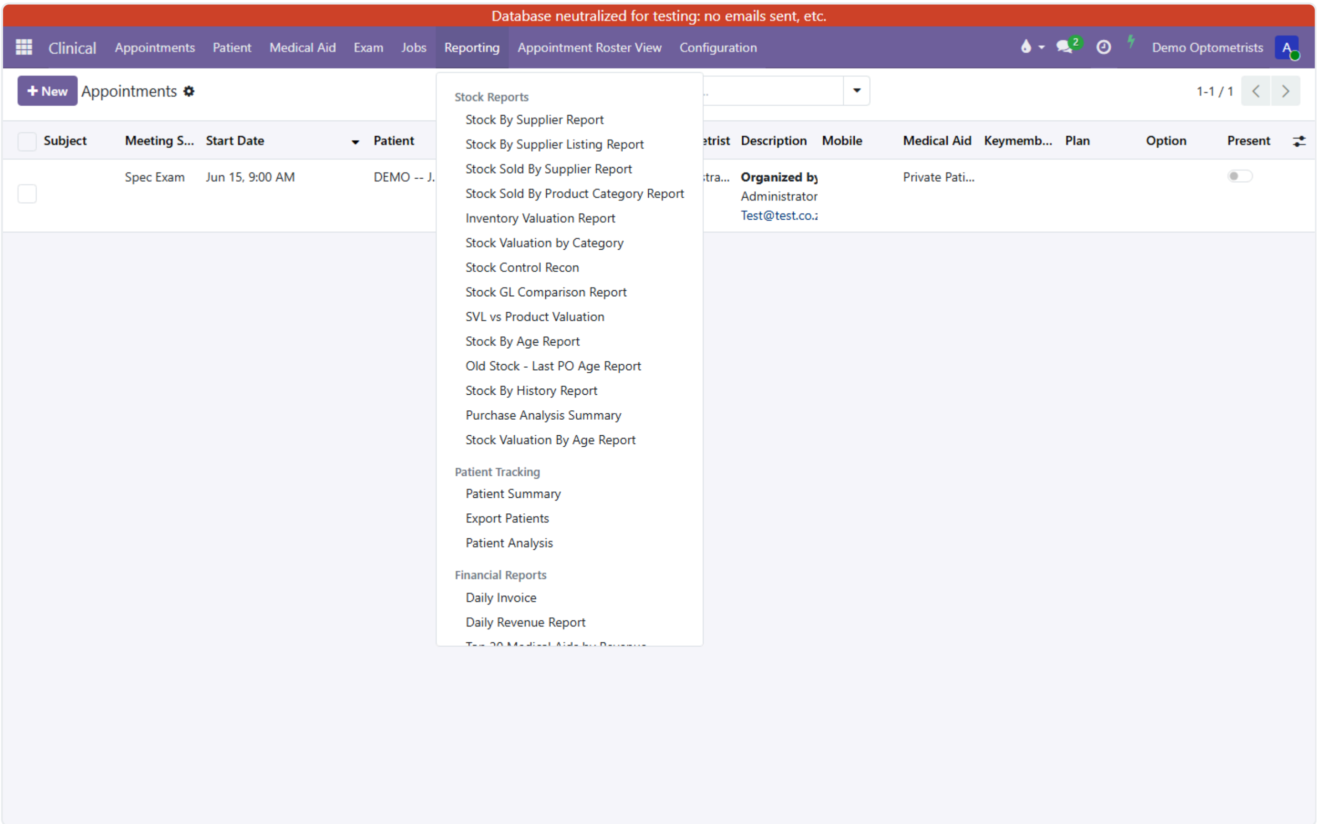


Tips

- Reports respect company scoping. If you serve more than one practice, switch to the right one in the top-right before running anything.

2. The Reporting menu

Click **Reporting** in the Clinical menu bar. The dropdown groups reports into five categories — *Stock Reports*, *Patient Tracking*, *Financial Reports*, *Patient Reports* and *SMS Tracking*. Hover or click into any category to see the individual reports inside. Each report is a small wizard that takes a date range and produces a PDF, an XLS file, or a clickable list.

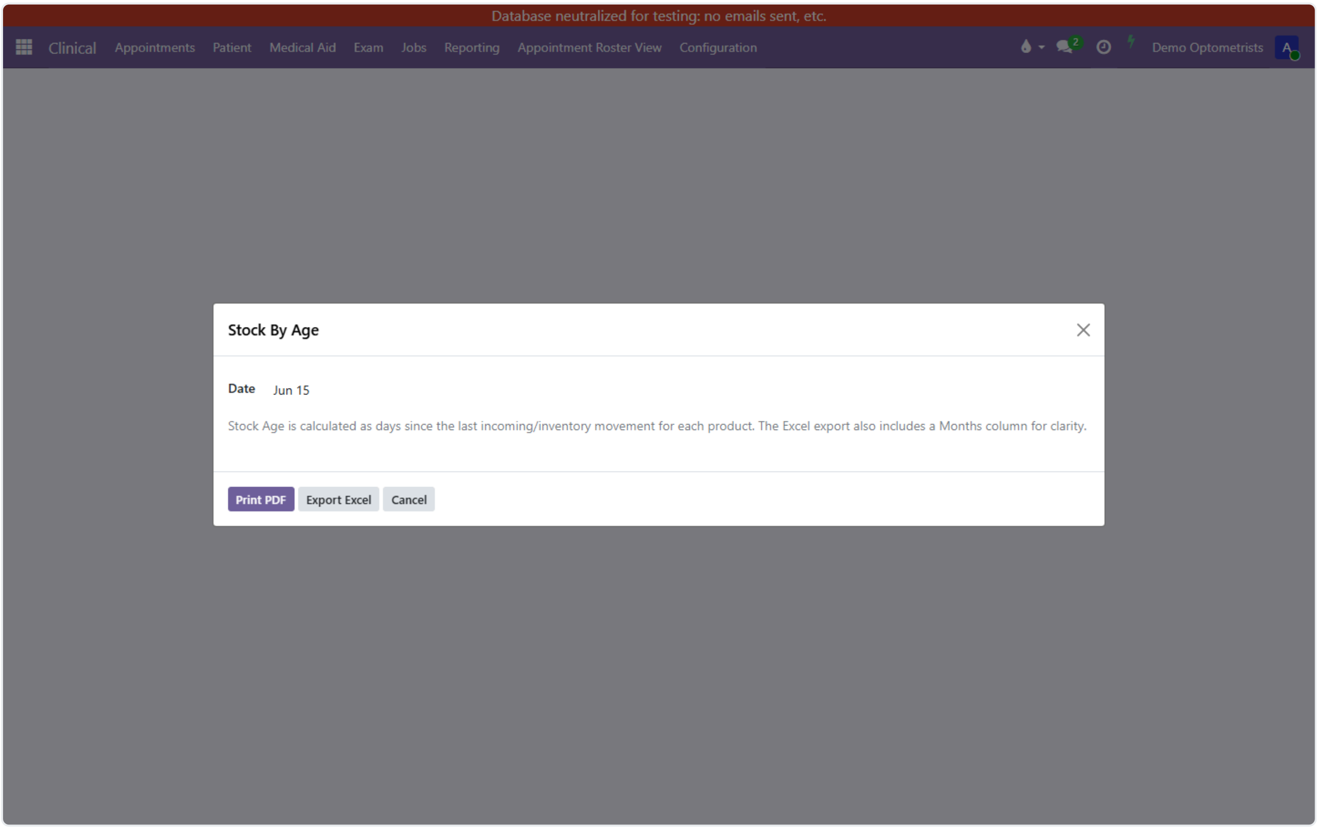


Tips

- The order of categories was chosen to match a typical month-end cycle: count stock, check patient activity, balance the books, follow up dormant accounts, audit SMS spend.

3. Stock By Age

Stock By Age is the dispenser's friend. Set the cut-off date and the wizard counts every product still in stock, with the number of days since it was last received in or sold. Print as PDF for the floor, or export to Excel for analysis. Frames sitting in the cabinet for more than 18 months are the usual targets for a clearance push or a return to the supplier.

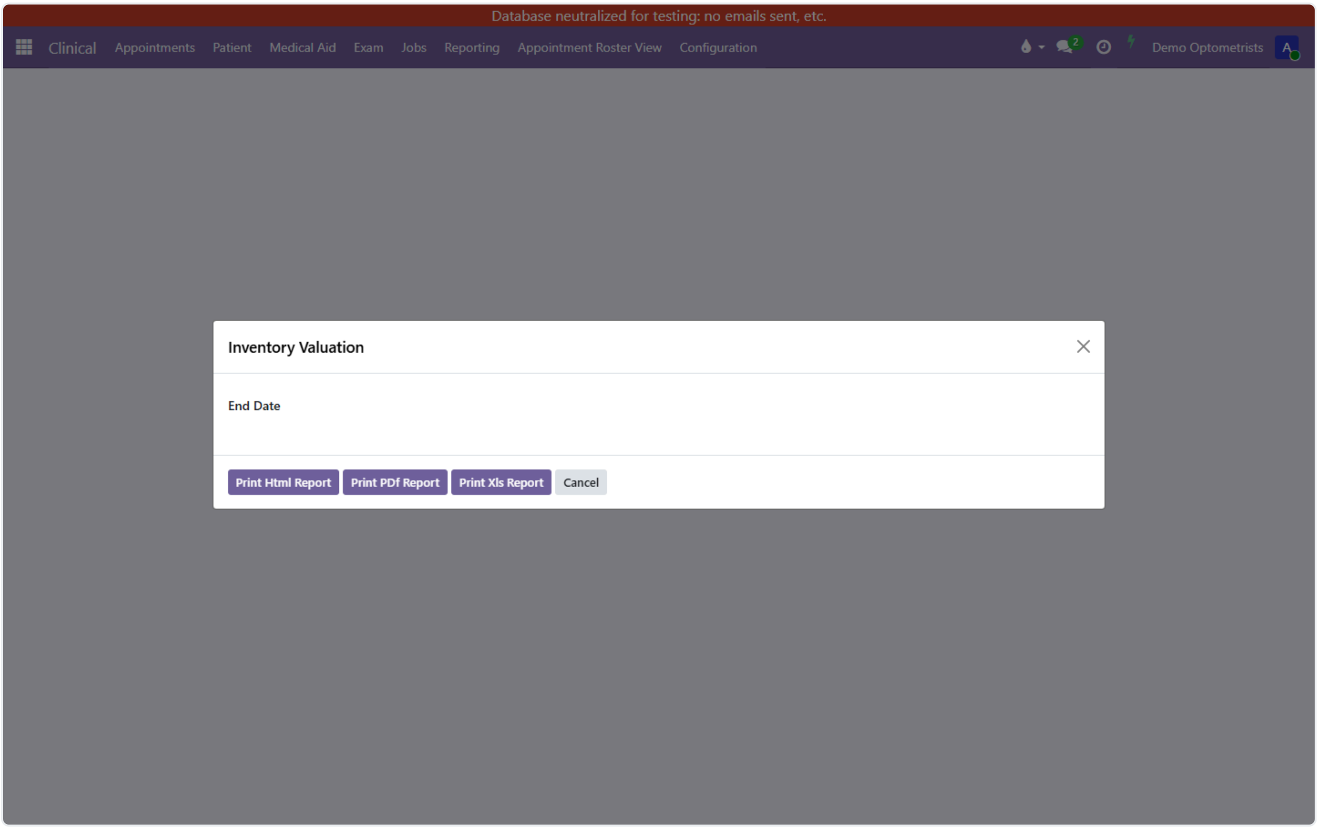


Tips

- Pair Stock By Age with the *Old Stock - Last PO Age Report* under the same menu — it tells you when each item was last bought, so you can spot lines you've stopped re-ordering.

4. Inventory Valuation

Inventory Valuation prices every item still on the shelf at an End Date that you pick — usually the last day of a financial period. The output choice is HTML (browser preview), PDF (for filing) or XLS (for spreadsheet work). Accounts uses this report every March for year-end stock count.

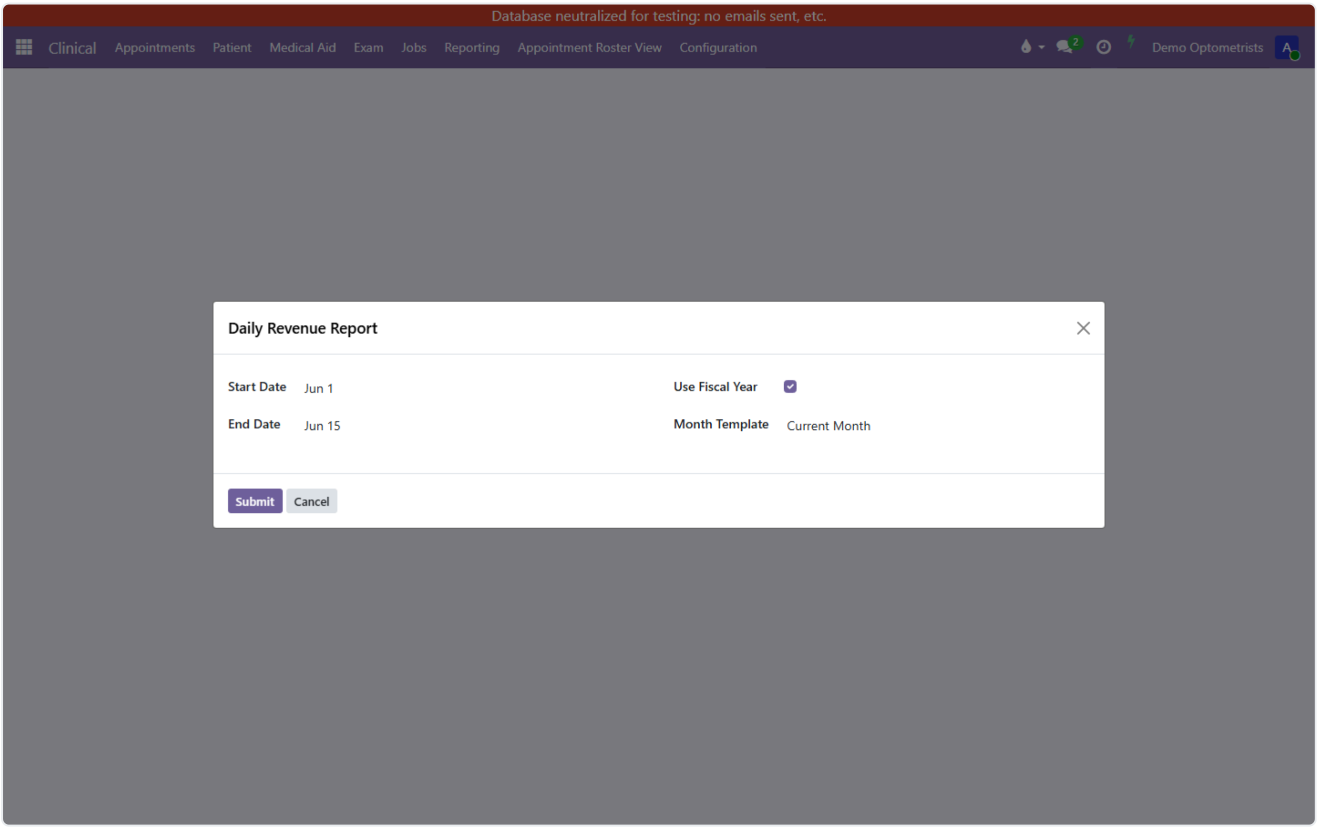


Tips

- Always run Inventory Valuation *after* the last stock movement of the period. Movements after the End Date won't be reflected, but ones recorded on that exact date will.

5. Daily Revenue Report

Daily Revenue Report is the front-desk's number at the end of the day. Pick a start and end date (or tick *Use Fiscal Year* + pick a Month Template for the calendar month) and the wizard produces a per-day breakdown of revenue, split by tender, by medical-aid plan and by category. Print as PDF for the safe; export to Excel to feed monthly KPIs.

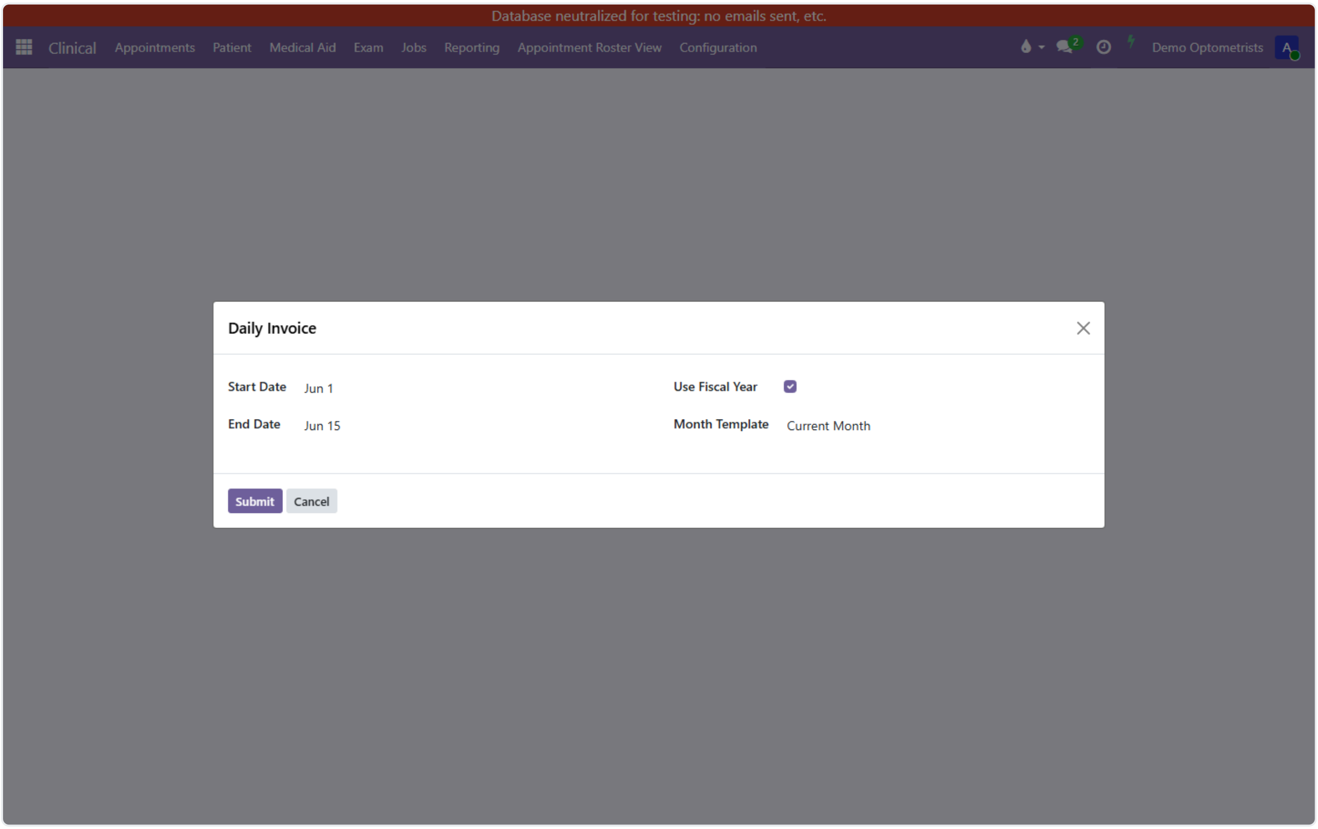


Tips

- The *Top 20 Medical Aids by Revenue* report (same menu) is the cleanest answer to *Which fund is paying us most?* — handy for negotiating practice-level rates.

6. Daily Invoice

Daily Invoice lists every invoice issued in a date range. Each line shows the patient, the optometrist, the medical aid and the totals. Use it as a sanity check against the cash-up total — front desk's count of invoices issued should match what the report counts.

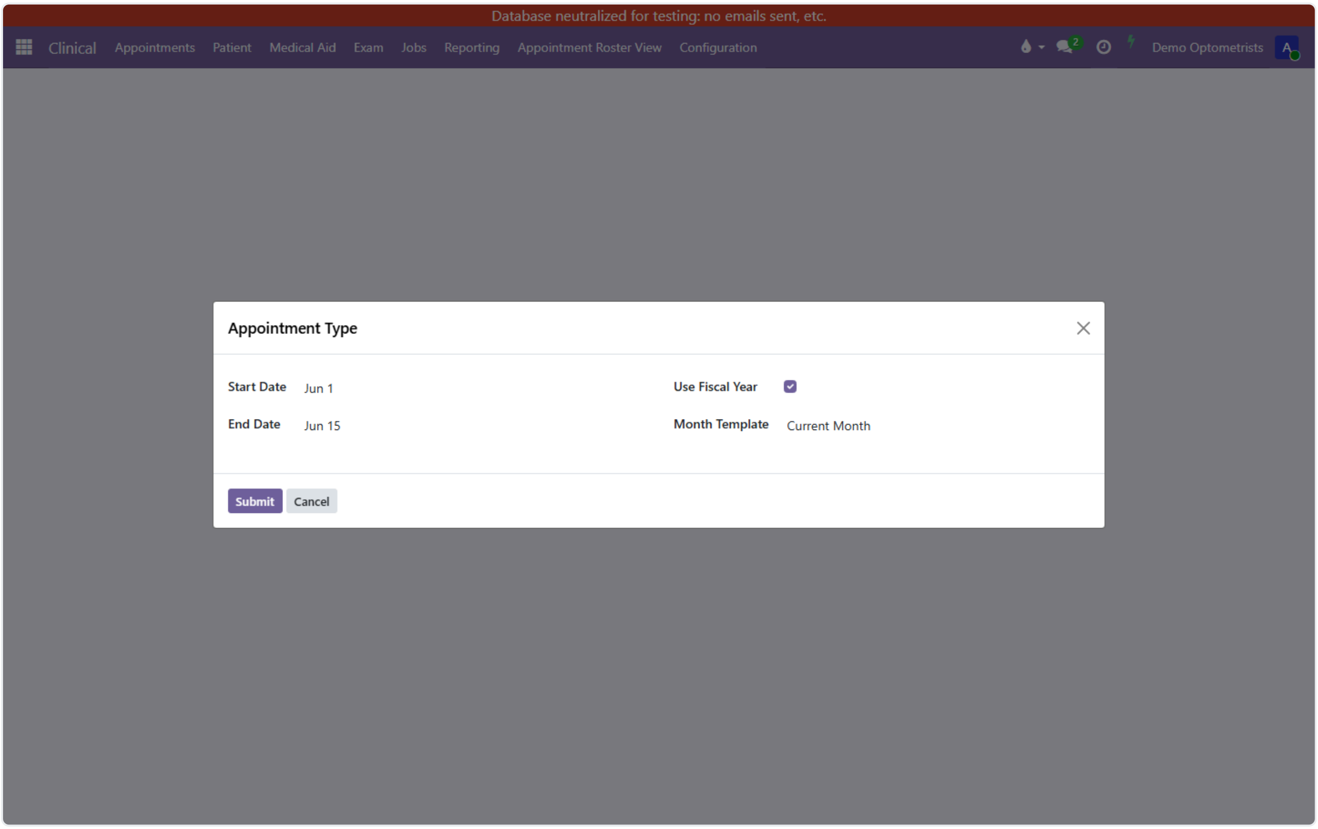


Tips

- The Daily Invoice report is the right place to start when a patient asks *Can I have a copy of my invoice from June?* — find it here, then click through to the invoice itself.

7. Appointment Type Report

Appointment Type Report breaks the diary down by appointment subject (Spectacle Exam, Contact Lens Fit, Recall, Walk-in…). Useful for spotting trends — for example, if recall conversion is trending down, you'd see it here before it shows up on revenue. Combine with the *DSR Consolidated* (Daily Stats Report) for a fuller picture of the consultation mix.

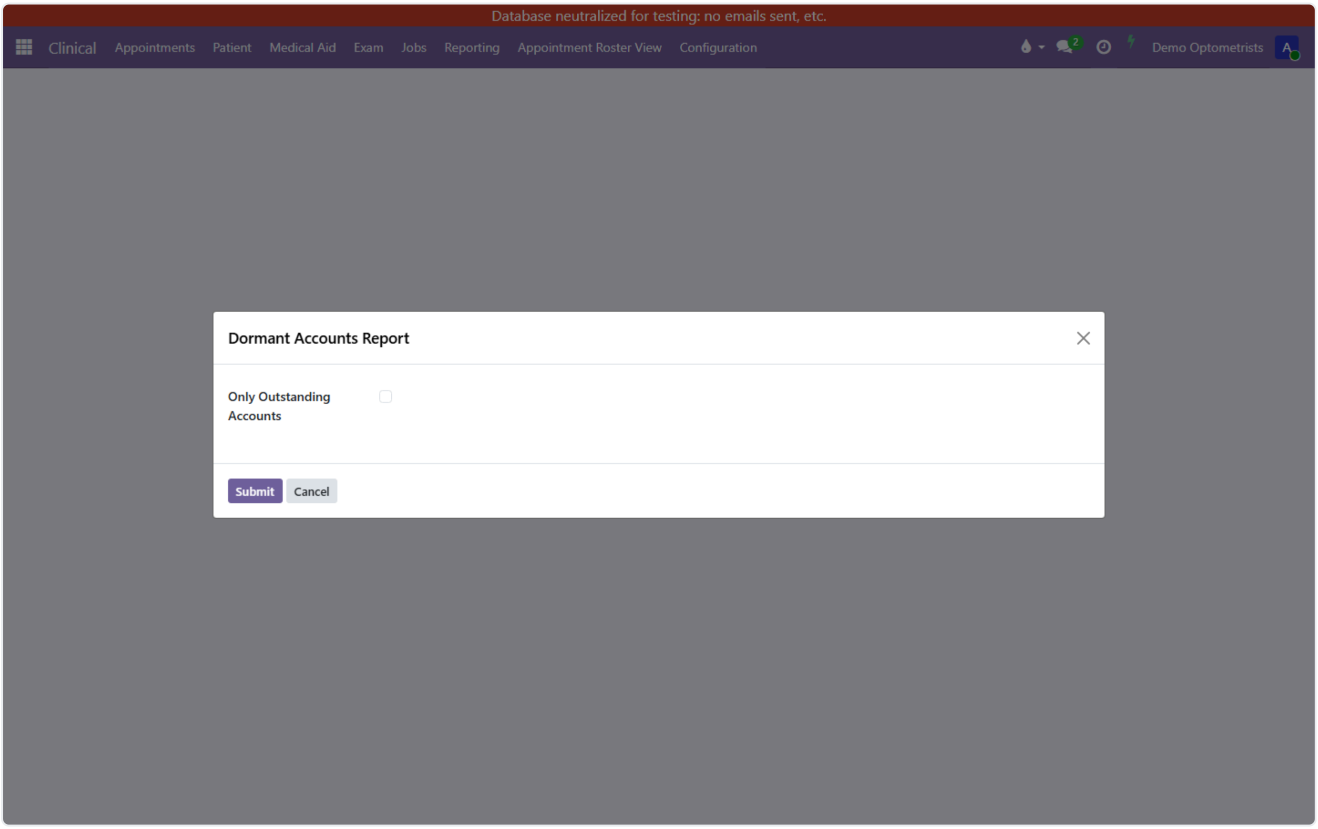


Tips

- Tag every appointment with a subject at booking — *Appointment Type Report* is only as good as the tags. A blank subject lands in *Untagged* on the report.

8. Dormant Accounts

Dormant Accounts lists patients who haven't visited within the chosen window (typically 24 months). Reception works the list in batches — call, SMS or email to bring them back in. The *Source* column tells you how they originally found the practice, useful for tailoring the re-engagement message.

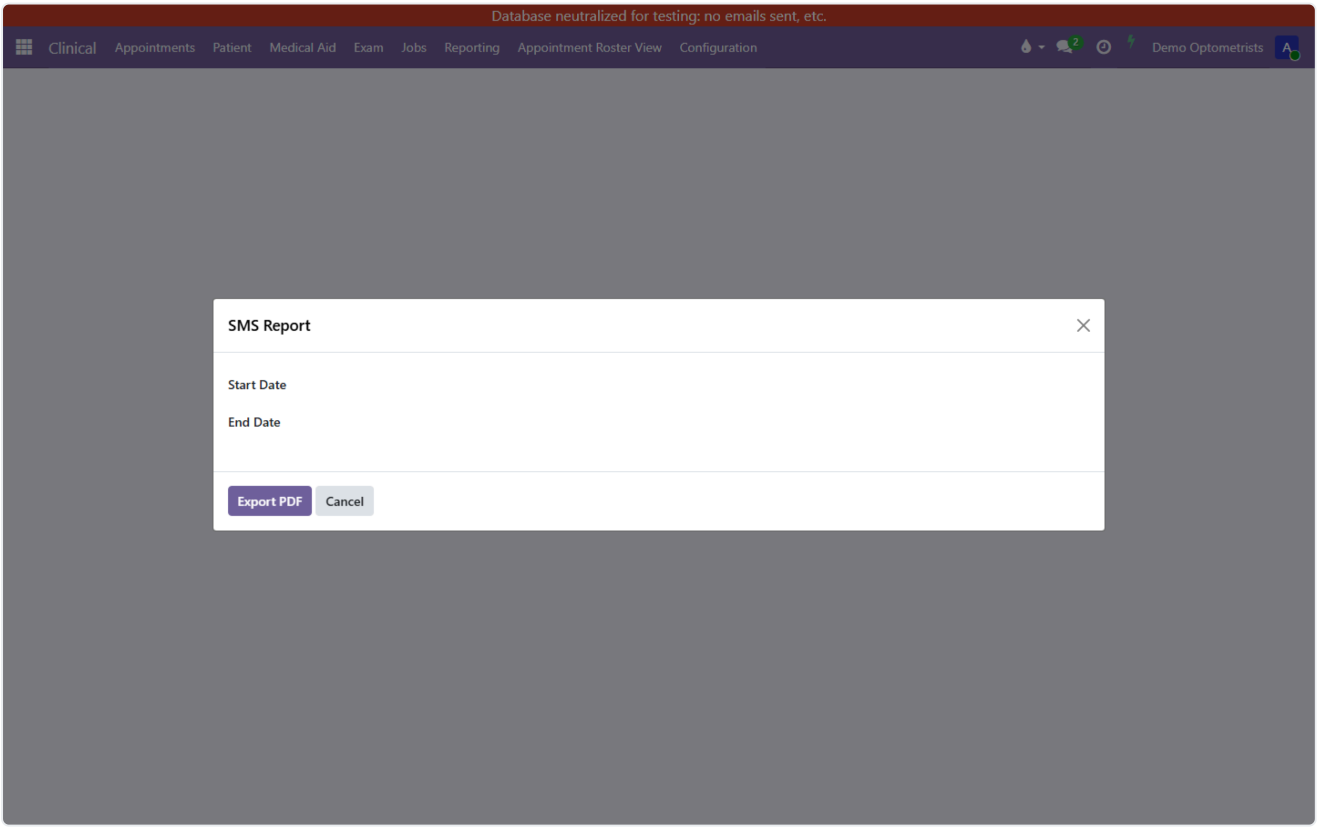


Tips

- Add a tag to dormant patients when you contact them so the next report excludes them — saves calling the same person twice.

9. SMS Tracking

SMS Report under SMS Tracking lists every SMS sent from the practice — appointment reminders, *glasses ready* notifications, campaign messages — with their delivery status. Failed messages show in red with a short reason (*invalid number*, *unsubscribed*, *provider error*). Check it monthly to keep numbers clean and spend predictable.

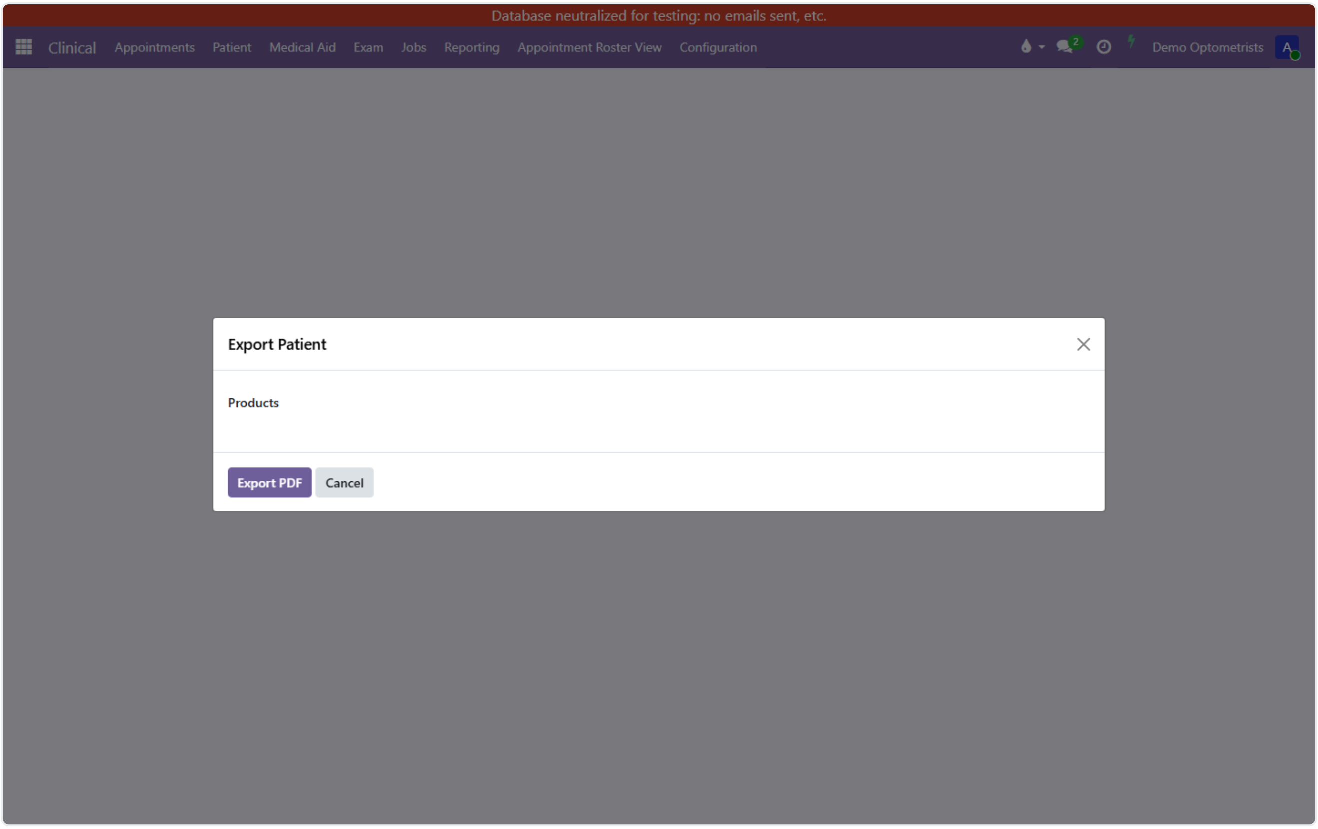


Tips

- If a patient's number is consistently failing, open their patient record and update the mobile field — TOMS won't retry the same number repeatedly.

10. Export Patients

Export Patients (Patient Tracking) is the one-click bulk-export of the patient database — full contact and medical-aid details, right out to a spreadsheet. Use it for migrations, audits or to hand a marketing partner a clean address list. Set a date filter so you don't pull the entire history when you only want this year's new patients.



Tips

- Treat the exported file as confidential — it's the full PII of every patient on file. Don't email; share via a private link or encrypted disk.

Troubleshooting

What happened	Why it happens	What to do
Report PDF is blank	The date range matched no records	Widen the date range; check the filter (some reports default to *Today*)
Report wizard hangs after Submit	TOMS is running the query — large date ranges on stock reports can take 30–60 seconds	Wait, or narrow the range to a single month
Numbers don't agree with the dashboard	Different reports use different filters (posted vs. all, current company vs. all)	Read the report header — it always lists the filters that were applied
Excel export looks corrupted	Excel is opening the file as CSV	Save the file first, then open Excel and use *File → Open* (not double-click)
Daily Revenue is short on one tender	Payments split unevenly across tenders (e.g. a card payment recorded as cash)	Open the day's invoices, fix the payment tender, re-run the report

Where to learn more

- **Stock Reports** — the *Inventory Valuation Report* is what accounts uses for year-end stock count. Run it for **31 March** to match the financial year-end.
- **Financial Reports** — *Daily Revenue Report* is the front-desk number. *Control Recon Report* is what accounts uses to tie session totals back to the bank statement.
- **Patient Reports** — *Dormant Accounts* feeds the recall campaign.
- The Humint **Management** course on training.humint.co.za covers reporting in full, with walk-throughs of each report's columns and how to interpret a problem.

How this manual stays current

Every screenshot here is captured by an automated Playwright walkthrough that opens each report wizard in turn and screenshots it. The walkthrough doesn't actually print — we capture the wizard, not the output — so the sanitised test database is never asked to generate a file.