Patient Dump Report & Fees / Miscellaneous Products

This report gives you a full list of every patient seen in a date range you choose, with the key details from their visit — plus a second list showing exactly which Fees & Miscellaneous products were sold to each patient over the same period. It's built for monthly reconciliation and patient follow-up: use it to check what happened in a month, or to see who bought what.

> The report produces **TWO TABLES IN ONE DOCUMENT**: the **PATIENT DUMP** (one row per visit) and the **FEES & MISCELLANEOUS** breakdown (one row per product sold). Both cover the same date range, so they always match.

Where to find it

1. Open the **Clinical** app (click the app icon on your Odoo home screen if you're not already inside it).
2. At the top of the screen, click **Reporting**.
3. A list of categories drops down. Click **Patient Reports**.
4. Click **Patient Dump Report**.

A small window (a "wizard") will pop up in the middle of your screen. This is where you choose what to include in the report.

Running the report

The wizard window has these fields:

- **Start Date** — click into this box and pick the first day you want the report to cover. This is required — the report will not run without it.
- **End Date** — click into this box and pick the last day you want the report to cover. Also required.
- **Month Template** — a shortcut. Instead of picking dates by hand, you can choose *Current Month*, *Previous Month*, *Current Year* or *Previous Year* from this dropdown and the Start Date / End Date boxes will fill in for you automatically.
- **Use Fiscal Year** — a checkbox. When ticked, the *Current Year* / *Previous Year* options above follow your practice's financial year instead of the 1 January–31 December calendar year. Leave it ticked unless someone in accounts tells you otherwise.

Once your dates are set, you have two buttons at the bottom of the window:

- **Print PDF** — click this to open the report as a PDF, ready to view, print or save.

- **Export XLSX** — click this to download the same report as an Excel file, with the two tables on two separate sheets ("Patient Dump" and "Fees & Misc Products"), so you can sort and filter the numbers yourself.

There's also a **Cancel** button if you want to close the window without running anything.

Reading the Patient Dump table

Each row is **one patient visit (exam)** that took place inside your chosen date range. If a patient was seen twice in the period, they will appear as two separate rows — one per visit.

Column	What it shows
Patient ID	The patient's unique number on file.
Patient Name	The patient's full name.
Telephone	The patient's mobile number (or landline if no mobile is on file).
Date of Last Examination	The date of this particular visit.
Chief Complaint	What the patient said was the reason for the visit, exactly as captured during the exam.
Currently Wearing Glasses?	Yes / No, as answered during this exam. Blank if the question wasn't asked/answered.
First Pair of Prescription Glasses?	Yes / No, as answered during this exam. Blank if the question wasn't asked/answered.
Unaided VA	The patient's unaided (no glasses) vision reading for each eye, e.g. *OD: 6/12 / OS: 6/9*.
Final RX	The final prescription given at this visit — sphere, cylinder, axis, add and vision for each eye.
Fees & Miscellaneous Products	A short list of every Fees/Misc product sold at this visit, with quantity and price.
Fees & Misc. Total	The total value of those Fees/Misc products for this visit.
Last Invoice	The patient's most recent invoice as at the End Date you chose — invoice number, date and amount.
Last Payment	The patient's most recent payment as at the End Date you chose — reference, date and amount.

Reading the Fees & Miscellaneous table

This table breaks the same period down to **one row per product sold** under Fees & Miscellaneous, so you can see exactly what moved and who bought it.

Column	What it shows
Patient ID / Patient Name	Who bought the product.
Exam Date	The date of the visit the product was sold at.
Product	The product name.
Qty	Quantity sold.
Unit Price	Price per unit.
Discount %	Any discount applied to that line.
Subtotal	Line value before tax.
Total	Line value including tax.

At the very bottom of this table you'll find a **Grand Total** — the sum of every Fees & Miscellaneous product sold across the whole date range.

Good to know

- **This is per visit, not per patient.** A patient with three exams in the chosen month will have three rows in the Patient Dump table.
- **Blank fields are normal.** If a question wasn't asked or answered during an exam (e.g. no Chief Complaint was typed in), that column will simply be empty on that row rather than showing an error.
- **Last Invoice and Last Payment are optional extras.** They show the patient's most recent invoice/payment as at your chosen End Date — useful for a quick reconciliation check, but they don't have to line up with the visit on that particular row.
- If the report comes back empty, double-check your Start Date and End Date — an empty result usually just means no exams fell inside the range you picked.

Need a change to this report? Contact Humint support and we'll help.