Reporting with Crystal Practice Management

Crystal PM Production Report

-Go to the Reports tab.
-Click on the drop down box next to "Report Type" and choose Billing Code Report.
-A time box will appear that will let you fill in your start and end dates. Please use a recent
12 month time frame.
-Once you have entered those, click "generate report". This will run the report and a new box
will open with your report information.
-To save the report to send as an attachment, click Print to File in the upper right hand corner.
-Choose where you want to save the file to and then enter a file name but end the files name
with .csv. This will save the file so that it can be sent as an email attachment.

Crystal PM AR Report

Go to Reports
In Report Type select Insurance Receivables
Click generate report
Make selections to what report you would like print (All insurance Providers)
(Slide the columns if necessary)
Select Past Due Amount: All