

Quick reference guide

What Neo Report Should I Run?

Find the report you need faster!



Start with a keyword



Filter by category



Star your favorites

What you're looking for

The Neo report for you

- List of invoice items and/or prices
- List of Scheduled Appointments



- Inventory Listing
- Appointment Summary

- Who got/bought/received or was dispensed an item
- How many sold
- Top selling products



- Dispensed products in a date range
- Sales by Product Class

- Invoicing or payment errors
- Who owes money



- Individual Client Payments & Invoices
- Accounts Receivable or Aged Accounts Receivable

- Sales or Productivity by Staff
- Top clients



- Sales by Product Class
- Sales and Cost of Sales by Staff
- Clients By Amount Invoiced (Top 1000)

- Client mailing list
- Patient mailing list



- Client Mailing Lists (Newsletters, SMS, Email)
- Patient Mailing List with Filters for Products and Signalment



Looking for more details? Check out these helpful reporting links:

- [Run Reports](#)
- [Recommended Daily and Monthly Reports](#)
- [List of Reports in Neo](#)