



V-Tech Prime End of Year Reports and Backup Process

The End of Year process needs to be done after close of business on the last business day of the year and before invoicing clients in the New Year.

Reports:

Suggested reports to print for the End of Year are listed below. You'll want to run these at the point you are DONE FOR THE YEAR of 2023. It is recommended you print them or save them for safekeeping.

Please Note: The procedure can only be run before 9am or after 6pm EST Monday-Friday and any time on the weekend. You are able to email report requests to kasara@2inova.com. These email request will be answered within 1-2 business days. You also have the option to schedule your reports to be ready on your select date. To read more on this feature please see the section labeled "Scheduled Reports"

- From the Receivables Menu > **The Receivables Report**: The Receivables Report cannot be backdated (the software only shows the Receivables as of the current date) so it is recommended to print this report at the end of the year so the clinic will have the receivable figures for the end of the year.
- From the Reports > Administrative Reports Menu: Run the **Inventory Cost Report**. This report lists the in-stock amounts for all inventory items, the clinic's cost and retail charge of all inventory items on the clinic's shelves. Like the Receivables Report, this report cannot be backdated, it only knows the current in stock amounts, and the current cost and retail charges.

Backup:

The End of Year Backup needs to be downloaded to an external USB. Label it "Year-End" after it is downloaded and keep it in a safe place. USB and/or external hard drives are your best choice.

Remember, to download your backup, you must have your confidential username and password to log onto our secure site. We have a backup document that we can share with you upon your request. If you have any questions or problems, please call 2i Nova technical support at (800) 858-0462. You are now ready for the New Year. Happy New Year! We appreciate your business.



Scheduled Reports:

Large reports can be scheduled and executed during off hours on specific dates.

🕒 Scheduled Reports

10 records

Report Name	Report Parameters	Due Date	Report Document	Type	Status	
					All	
Financial Report	Parameters: 18/11/2023 - 31/11/2023	12/13/2023	Download	pdf	Done	
Business Report	Parameters: 18/11/2023 - 31/11/2023	12/10/2023		xls	Cancelled	
Invoice By Date	Parameters: 18/11/2023	12/09/2023	Download	pdf	Done	
Business Report	Parameters:	12/05/2023		pdf	Pending	Cancel
Business Report	Parameters: 18/11/2023 - 31/11/2023	12/04/2023		pdf	Cancelled	

Showing 1 to 10 of 12 entries

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To schedule a report, input the report range, **Schedule Date** and click on **Schedule**:

📈 Financial Reports

AccountCode Summary	
Business Report	
Daily Summary	
Deposit Slip	

Dates

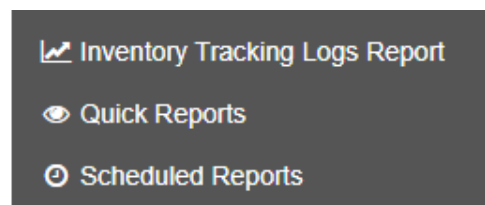
Beginning Date: 12/12/2023

Ending Date: 12/12/2023

Schedule Date: 12/01/2023 **Schedule**

The report will be available on the **Schedule Date** at the beginning of working hours.

Requested reports can be seen from the **Reports** → **Scheduled Reports** page in the menu:



Statuses and download links of all Scheduled Reports can be seen from there. **Pending** reports can be cancelled.

Please note that this feature will be coming to Prime live on December 27th.