

# FLOW: adding custom view on ledger screen to see who added/edited transactions

1

View Ledger

FLOW

ARISU000 - Sunny Arizona

- ◆ Homepage
- ◆ Customize Page
- ◆ New Homepage

**Daily Patient Summary**

No appointments today

All ▾ [Go to Scheduler](#) | [See More](#)

**Daily Revenue Goal**

\$0

▼ \$3,500.00

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Target \$3,500.00

Scheduled ▾ [Go to Revenue Goals](#) | [Day | Month](#)

**DentiMax Training Videos**

DentiMax YouTube Channel

DentiMax Overview

- ◆ DentiMax: Making Appoi...
- ◆ DentiMax Ledger Webinar
- ◆ DentiMax Statements
- ◆ DentiMax Insuran
- ◆ DentiMax Chartin

**Practice Stats (YTD)**

- ◆ Patients Seen: 48
- ◆ New patients: 33
- ◆ Services Provided: 75
- ◆ Completed Appointments: 24
- ◆ Missed Appointments: 0
- ◆ Unscheduled Treatment: 0

69%

New Patients

Total: 33

31%

Existing Patient...

Total: 15

**Daily Production**

11/07	0
11/08	0
11/09	0
11/10	0
11/11	0
11/12	0
11/13	0
\$0	

**Service Stats (7 days)**

- ◆ Restorative: 1 (100%)
- ◆ Preventive: 0 (0%)
- ◆ Oral Surgery: 0 (0%)
- ◆ Adjunct Serv: 0 (0%)
- ◆ Implant Serv: 0 (0%)
- ◆ Endodontics: 0 (0%)

- ◆ Maxillo Prosth: 0 (0%)
- ◆ Conditions: 0 (0%)
- ◆ Diagnostic: 0 (0%)
- ◆ Other: 0 (0%)

Total: 1

**Daily Activities**

1

Unconfirmed Appts for the week

0

Recalls last w

- ◆ Send Claims
- ◆ Route Slips
- ◆ Print Deposit Slip
- ◆ Print Statements
- ◆ Print Day Sheet

## 2 In the ledger body: right click

Ins 1:	Aetna PPO	\$370.00	Adjustments:	\$0.00	Balance	\$370.00	\$370.00	
Ins 2:	None	\$0.00	Ins Pmts:	\$0.00	Std Ded	\$50.00/\$0.00	\$50.00/\$0.00	
HOH:	Arizona, Sunny	\$0.00	Patient Pmts:	\$0.00	Prv Ded	\$0.00	\$0.00	
			Total:	\$370.00	Other Ded	\$0.00	\$0.00	
					Ins 1 Used	\$0.00		
					Ins 1 Max	\$5,500.00		
			Current	\$179.00	30 Days	\$191.00	60 Days	\$0.00
			90+ Days	\$0.00				

  

Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Collections In Date	Collections Phase	Collections Out Date
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
pical first radiographic im	ARQ00		\$30.00	Completed	\$0.00				\$30.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
luation - problem focused	ARQ00		\$30.00	Completed	\$0.00				\$30.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
oral evaluation - new or e	ARQ00		\$70.00	Completed	\$0.00				\$70.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ographic image	ARQ00		\$49.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
oral evaluation - new or e	ARQ00		\$79.00	Completed	\$0.00				\$79.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ographic image	ARQ00		\$49.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
radiographic images	ARQ00		\$63.00	Completed	\$0.00				\$63.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

## 3 Click "Customize View"

HOH:	Arizona, Sunny	\$0.00	Patient Pmts:	\$0.00	Prv Ded	\$0.00	\$0.00	
			Total:	\$370.00	Other Ded	\$0.00	\$0.00	
					Ins 1 Used	\$0.00		
					Ins 1 Max	\$5,500.00		
			Current	\$179.00	30 Days	\$191.00	60 Days	\$0.00
			90+ Days	\$0.00				

  

Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Collections In Date	Collections Phase	Collections Out Date
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
pical first radiographic im	ARQ00		\$30.00	Completed	\$0.00				\$30.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
luation - problem focused	ARQ00		\$30.00	Completed	\$0.00				\$30.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
oral evaluation - new or e	ARQ00		\$70.00	Completed	\$0.00				\$70.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ographic image	ARQ00		\$49.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ice eclaim sent				Completed	\$0.00					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
oral evaluation - new or e	ARQ00		\$79.00	Completed	\$0.00				\$79.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
ographic image	ARQ00		\$49.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
radiographic images	ARQ00		\$63.00	Completed	\$0.00				\$63.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

  

- View Details
- View Billing Options
- Reprint Statement
- New Transaction
- New Ledger Note
- Create Claim
- View Claim
- Print Claim
- Issue a Patient Refund
- Delete Transaction
- Export Ledger
- Customize View

Post Date: 11/15/2025

## 4 Select "Updated By"

The screenshot shows a 'Customize View' dialog box overlaid on a transaction list. The dialog has two columns: 'Available Fields' and 'Viewed Fields'. In the 'Available Fields' column, the 'Updated By' field is highlighted with an orange circle. The 'Viewed Fields' column contains several fields, including 'Name', 'Date', 'Name', 'Billing', 'Code', 'Description', and 'Provider'. Below the dialog are buttons for 'Use Defaults', 'Cancel', and 'Save'. The background shows a table of transactions with columns for Date, Name, Billing, Code, and Description.

Date	Name	Billing	Code	Description
10/24/25	Sunny	921	CLAIM	Primary insurance eclaim sent
10/24/25	Sunny	921	D0220	intraoral - periapical first radiographic im
10/24/25	Sunny	921	CLAIM	Primary insurance eclaim sent
10/24/25	Sunny	921	D0140	limited oral evaluation - problem focused
10/16/25	Sunny	921	D0150	comprehensive oral evaluation - new or e
10/16/25	Sunny	921	D0330	panoramic radiographic image
10/12/25	Sunny	921	CLAIM	Primary insurance eclaim sent
10/6/25	Sunny	921	D0150	comprehensive oral evaluation - new or e
10/6/25	Sunny	921	D0330	panoramic radiographic image
10/6/25	Sunny	921	D0274	bitewings - four radiographic images

## 5 Click ">" to move to the Viewed Fields

The screenshot shows a 'Customize View' dialog box overlaid on a 'Billing Information' section. The dialog has two columns: 'Available Fields' and 'Viewed Fields'. In the 'Available Fields' column, the '>' button is highlighted with an orange circle. The 'Viewed Fields' column contains several fields, including 'Name', 'Date', 'Name', 'Billing', 'Code', 'Description', and 'Provider'. Below the dialog are buttons for 'Use Defaults', 'Cancel', and 'Save'. The background shows a 'Billing Information' section with fields for Insurance, Est Due, Charges, Adjustments, Ins Pmts, Patient Pmts, and Total. Below this is a table of transactions with columns for Name, Billing, Code, and Description.

Name	Billing	Code	Description
Sunny	921	CLAIM	Primary insurance eclaim sent
Sunny	921	D0220	intraoral - periapical first radiographic im
Sunny	921	CLAIM	Primary insurance eclaim sent
Sunny	921	D0140	limited oral evaluation - problem focused
Sunny	921	D0150	comprehensive oral evaluation - new or e
Sunny	921	D0330	panoramic radiographic image
Sunny	921	CLAIM	Primary insurance eclaim sent
Sunny	921	D0150	comprehensive oral evaluation - new or e
Sunny	921	D0330	panoramic radiographic image
Sunny	921	D0274	bitewings - four radiographic images

## 6 Click "Save"

The screenshot shows a 'Customize View' dialog box overlaid on a ledger view. The dialog has two columns: 'Available Fields' and 'Viewed Fields'. 'Available Fields' includes Name, Item to Pay, Note, Related Adjustment, Total, Treatment Plan, and Type. 'Viewed Fields' includes Name, Date, Name, Billing, Code, Description, and Provider. A 'Save' button is highlighted with an orange circle.

## 7 Now you will have the "Updated By" as a view field on the ledger. This will show the last person that made a change to a specific transaction. (Not just who entered the transaction, who made the most recent change)

The screenshot shows a ledger view with a table of transactions. The 'Updated By' column is visible, showing names like 'tiffanye' and 'Laurel'. An orange circle highlights the 'Updated By' column header.

Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Collections In Date	Collections Phase	Collections Out Date	Updated By
			\$0.00	Completed	\$0.00				\$30.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				tiffanye
			\$30.00	Completed	\$0.00				\$70.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				tiffanye
			\$70.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				tiffanye
			\$49.00	Completed	\$0.00				\$79.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				tiffanye
			\$79.00	Completed	\$0.00				\$49.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Laurel
			\$49.00	Completed	\$0.00				\$63.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Laurel
			\$63.00	Completed	\$0.00										