# **Reporting Settings**

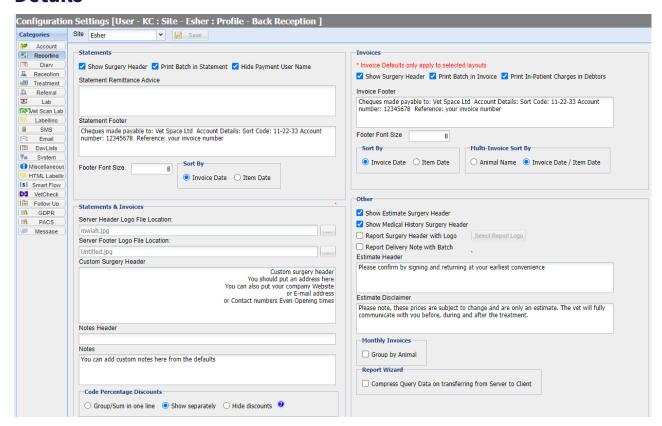
24/04/2025 2:21 pm BST

# **Summary**

Reporting Settings can be accessed via: Administration > Settings and selecting the 'Reporting' category.

This page documents each setting.

# **Details**



# **Statements**

### **Show Surgery Header**

Enabled = Includes the surgery header on statements.

Disabled = Hides the surgery header on statements.

#### **Print Batch in Statement**

Enabled = Includes batch details on statements.

Disabled = Hides batch details on statements.

### **Hide Payment User Name**

Enabled = Includes Payment Username on statements.

Disabled = Hides Payment Username on statements.

#### **Statement Remittance Advice**

The text submitted here will be included on all statements issued from the Merlin System, above the remittance part of the statement.

### **Statement Footer**

The text entered will appear on the bottom of all statements, leave this text box blank for no footer information to appear.

#### **Footer Font Size**

Enter the size font required for your statement footer here.

### **Sort By - Invoice/Item Date**

Invoice Date = The date the invoice was created.

Item Date = The date the item was added.

### **Statements & Invoices**

### **Server Header Logo File Location:**

This box allows you to insert a .jpeg logo file to include on your statements.

### **Server Footer Logo File Location:**

This box allows you to insert a .jpeg logo file to include on the footer area of your statements.

### **Custom Surgery Header**

This box allows you to insert a custom header for your statements. This is usually your Site name, Address details and contact number however you can also include your email address, website details etc.

### **Notes header**

This box lets you change your notes header on the statements page. By default this is set to: 'Credit Terms: Payment by return please'.

#### **Notes**

The notes below the header can also be edited using the free-text box provided.

### **Code Percentage Discounts**

You can only select one option; the options operate as below:

Group/Sum in one line = Groups/Summarises all discounts in one line on the Statement

Show separately = Shows each discount separately

Hide discounts = Does not show discounts on statements

# **Invoices**

### **Show Surgery Header**

Enabled = Include the surgery header on the statements.

Disabled = Hide the surgery header on the statements.

#### **Print Batch in Invoice**

Prints batch details on Invoice.

### **Invoice Footer**

The text entered will appear on the bottom of all statements, leave this text box blank for no footer information to appear.

#### **Footer Font Size**

Enter the size required for your statement footer here.

### **Sort By - Invoice/Item Date**

Invoice Date = The date the invoice was created.

Item Date = The date the item was added.

### Sort By - Multi-Invoice/Item Date

As above, for Multi-Invoices.

# **Other**

### **Show Estimate Surgery Header**

Enabled = Show site details (address, phone number, etc) on the header of Estimates.

Disabled = Hide site details (address, phone number, etc) on the header of Estimates.

### **Show Medical History Surgery Header**

Enabled = Show site details (address, phone number, etc) on the header of History Reports.

Disabled = Hide site details (address, phone number, etc) on the header of History Reports.

### **Report Surgery Header with Logo**

Enabled = Add your selected logo to all statements, invoices, estimates and histories.

Disabled = Do not display a logo on all statements, invoices, estimates and histories.

### **Report Delivery Note with batch**

Enabled = Show batch numbers on Delivery Notes.

Disabled = Hide batch numbers on Delivery Notes.

### **Estimate Header**

The text entered will appear on the top of all estimates, leave this text box blank for no header information to appear.

### **Estimate Disclaimer**

The text entered will appear on the bottom of all estimates, leave this text box blank for no disclaimer information to appear.

# Monthly Invoices - Group by animal

Enabled = Monthly invoices created through 'Create Monthly Invoices' are grouped by animal.

Disabled = No Action