

# Reporting Settings

30/07/2025 4:32 pm BST

## Summary

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

This page documents each setting.

## Details

Configuration Settings

Categories

Site Esher SA Save

Account

Reporting

Diary

Reception

Treatment

Referral

Lab

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Labelling

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HTML Labelling

Smart Flow

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Message

Statements

Statements & Invoices

Invoices

Other

Show Surgery Header

Print Batch in Statement

Hide Payment User Name

Statement Remittance Advice

Please detach and send with your payment

Statement Footer

Footer Font Size 12

Sort By

Invoice Date

Item Date

Server Header Logo File Location:

MWI Logo.JPG

Server Footer Logo File Location:

\\Logos\FooterLogo.jpeg

Custom Surgery Header

Jupiter Systems Ltd  
82 Meadow Road  
Godalming  
Surrey  
GU7 3HT  
Tel: 0845 2000 725  
Web: http://www.JupiterSystems.net  
Email: support@jupiterSystems.net

Notes Header

Credit Terms: Payment by return please

Notes

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Code Percentage Discounts

Group/Sum in one line

Show separately

Hide discounts

\* Invoice Defaults only apply to selected layouts

Show Surgery Header

Print Batch in Invoice

Print In-Patient Charges in Debtors

Invoice Footer

Account No: 00219639 Sort Code: 83-15-28  
Any overdue account will incur a £10 administration fee if not settled within our credit terms of 30 days.

Footer Font Size 8

Sort By

Invoice Date

Item Date

Multi-Invoice Sort By

Animal Name

Invoice Date / Item Date

Show Estimate Surgery Header

Show Medical History Surgery Header

Report Surgery Header with Logo

Report Delivery Note with Batch

Estimate Header

Please note the figure(s) shown are an estimate only, based on the procedures and tests foreseen at the time the estimate was made. The cost of drugs which will be required during \$F{AnimalName}'s stay with us and any follow up treatments are not included since these will vary between individual animals.

Estimate Disclaimer

If unforeseen procedures are found to be necessary we will always try to contact you first, therefore please make sure we have your daytime telephone number. If you cannot be contacted we will carry out whatever treatments or procedures the veterinary surgeon considers is in the best interest of \$F{AnimalName}. This estimate is only valid for 90 days

Monthly Invoices

Group by Animal

Report Wizard

Compress Query Data on transferring from Server to Client

## 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

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