Report Libraries

17/06/2026 8:42 am BST

Summary

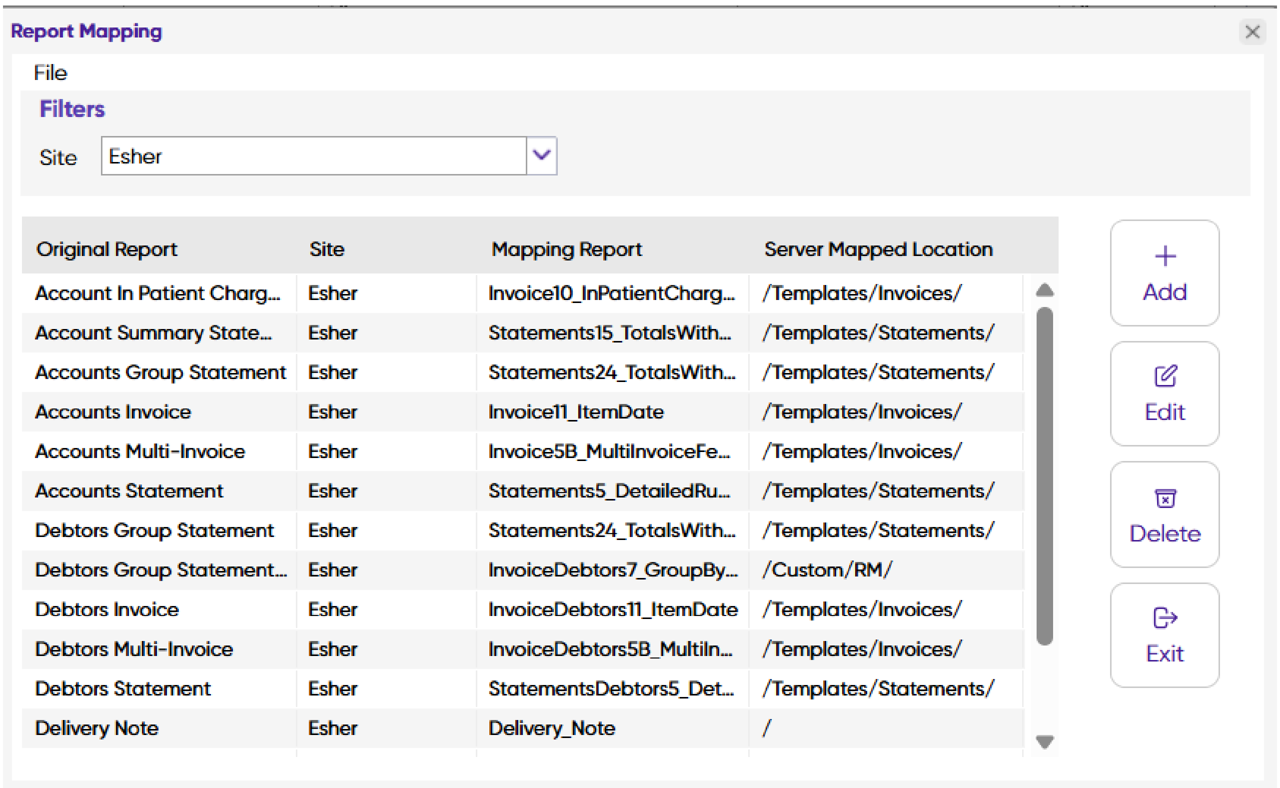
This page documents how to specify the report templates you want to use for sending statements and invoices within the system.
Report Templates can be viewed at the bottom of this page.

Details

Report Mapping

Standard default templates will be mapped by your Customer Product Consultant (CPC).

If you would like to select a different template for your statements and invoices, this can be changed via the Administration > Reports > Report Mapping screen. Your CPC can support you through making these changes.



Original Report	Site	Mapping Report	Server Mapped Location
Account In Patient Charg...	Esher	Invoice10_InPatientCharg...	/Templates/Invoices/
Account Summary State...	Esher	Statements15_TotalsWith...	/Templates/Statements/
Accounts Group Statement	Esher	Statements24_TotalsWith...	/Templates/Statements/
Accounts Invoice	Esher	Invoice11_ItemDate	/Templates/Invoices/
Accounts Multi-Invoice	Esher	Invoice5B_MultiInvoiceFe...	/Templates/Invoices/
Accounts Statement	Esher	Statements5_DetailedRu...	/Templates/Statements/
Debtors Group Statement	Esher	Statements24_TotalsWith...	/Templates/Statements/
Debtors Group Statement...	Esher	InvoiceDebtors7_GroupBy...	/Custom/RM/
Debtors Invoice	Esher	InvoiceDebtors11_ItemDate	/Templates/Invoices/
Debtors Multi-Invoice	Esher	InvoiceDebtors5B_MultiIn...	/Templates/Invoices/
Debtors Statement	Esher	StatementsDebtors5_Det...	/Templates/Statements/
Delivery Note	Esher	Delivery_Note	/

Alternatively, you can contact the help desk to support the implementation of new templates.

Selecting a new/editing your choice of report template

1. Select 'Add' to choose a new layout or 'Edit' to edit existing selection

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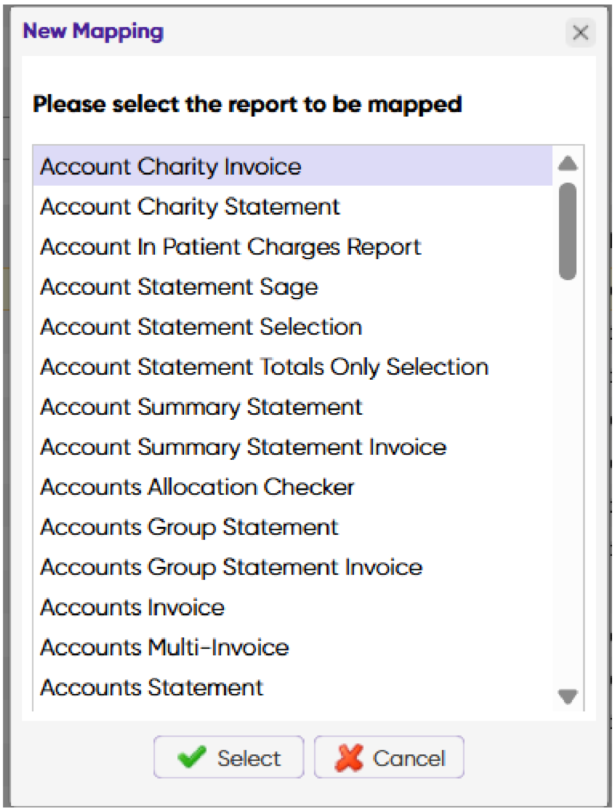
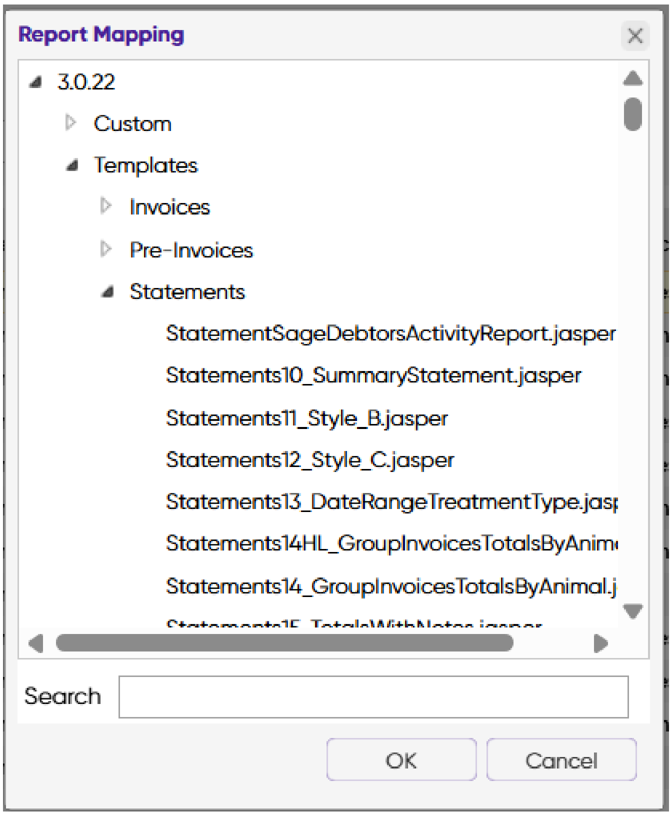
2. A menu displays, select the area of the system you want to change the report template for.

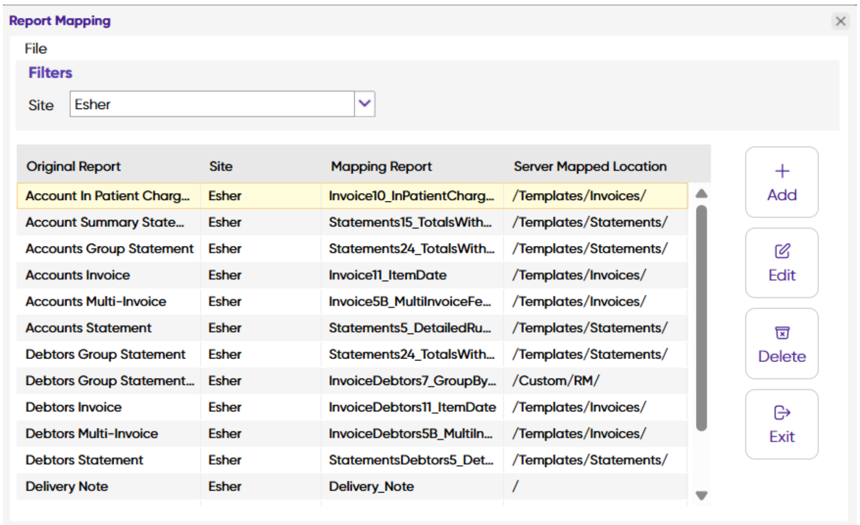
3. Select the Report to be mapped and click “Select”.



4. Select the template name you want to assign and click “OK”.



5. The report will display in the grid as mapped to a template.



Report Mapping Templates

Area	Compatible Template

Accounts Invoice & Debtors Invoice	Inv1FeesDrugs.pdf Inv2Standard.pdf Inv6StyleB.pdf Inv8DateRangeTreatmentType.pdf Inv11ItemDate.pdf Note: The following invoices display payments against invoices. To ensure Payment allocation is correct on Client accounts, run the report 'Accounts Allocation Checker' under the Reports > Accounting Category. InvLAStandardClientBalance.pdf InvLAStandardInvoiceBalance.pdf
Accounts Multi-Invoice & Debtors Multi-Invoice	Inv5MultiDateOrder.pdf Inv5AMultiGroupByAnimal.pdf Inv5CMultiInvoice.pdf Note: The following invoices display payments against invoices. To ensure Payment allocation is correct on Client accounts, run the report 'Accounts Allocation Checker' under the Reports > Accounting Category. InvLAMultiInvoiceBalance.pdf InvLAMultiClientBalance.pdf
Accounts Statement (Detailed) & Debtors Statement (Detailed)	Statement1Detailed.pdf Statements1BDetailedWithTotalNowDue.pdf Statements3DetailedWithPeriodBalances.pdf Statements5DetailedRunningBalances.pdf Statements13DateRangeTreatmentType.pdf Statements20RunningBalance.pdf Statements25EEGroupByInvoice.pdf
Accounts Statement (Group) & Debtors Statement (Group)	Statements14GroupInvoicesTotalsByAnimal.pdf
Accounts Statement (Summary/Total) & Debtors Statement(Summary/Total)	Statements4TotalsWithPeriodBalances.pdf Statements6TotalsWithRunningBalance.pdf Statements22SummaryStatement.pdf Statements24TotalsWithPeriodBalances.pdf Statments10SummaryStatement.pdf
Create Monthly Invoices (Pre-Invoice)	PreInvoiceList2PatientName.pdf PreInvoiceList3DateRangeTreatmentType.pdf

Create Monthly Invoices (Invoice)	Inv1FeesDrugs.pdf Inv2Standard.pdf Inv6StyleB.pdf Inv8DateRangeTreatmentType.pdf Inv11ItemDate.pdf