Treatment Settings

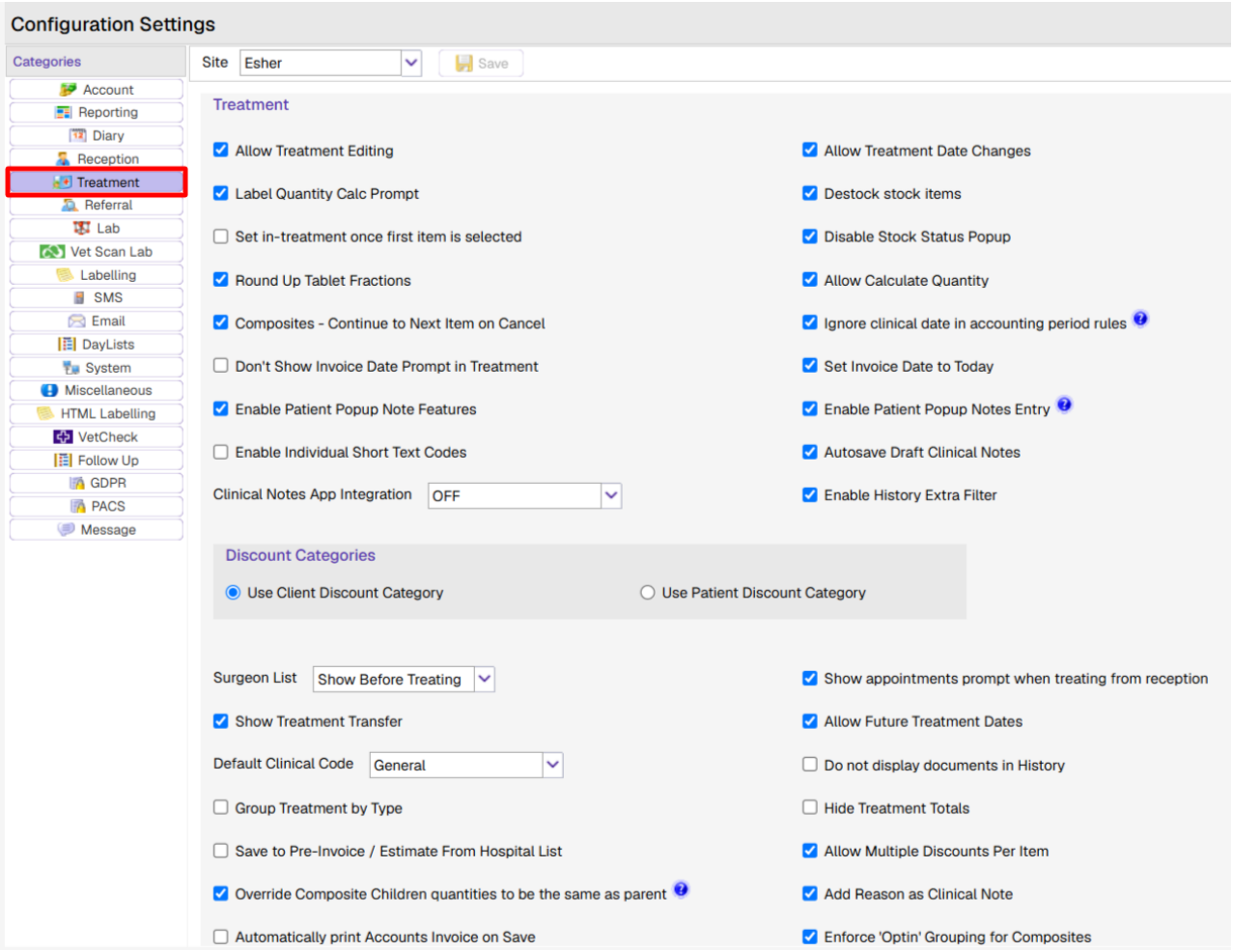
21/10/2026 11:54 am BST

Summary

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

This page documents each setting.

Details



Allow Treatment Editing

Enabled: Allow users to edit treatments.

Disabled: Do not allow users to edit treatments.

Label Quantity Calc Prompt

Enabled: Prompts users before auto-calculating label quantity.

Disabled: Does not prompt users before auto-calculating label quantity.

Set in-treatment once first item is selected

Enabled: Flags a patient as in-treatment (purple) as soon as the first item is added to draft.

Disabled: Flags a patient as in-treatment (purple) as soon as the treatment history screen is opened.

Allow Calculate Quantity

Enabled: Enables label quantity calculation.

Disabled: Disables label quantity calculation.

Invoice date only to be after consolidation date and allow item dates to be in any range

Enabled: Items can be entered outside of the consolidation date, but invoice date cannot be outside of consolidation date.

Disabled: No items/invoices can be entered outside of the consolidation date.

Don't Show Invoice Date Prompt in Treatment

Enabled: Users are not prompted and invoice date will default to the item date.

Disabled: Users are prompted to input the invoice date (useful if regularly backdating treatment).

Enable Patient Popup Note Features

Enabled: Enables individual Patient Popups.

Disabled: Disables individual Patient Popups.

Autosave Draft Clinical Notes

Enabled: Enables autosave for Clinical Notes

Disabled: Disables autosave for Clinical Notes

Enable Individual Short Text Codes

Enabled: Enables Individual Short Text Codes - Users can set and use their own short texts.

Disabled: Disabled Individual Short Text Codes - All users use the same short texts.

Discount Categories

Specify whether the system applies discount by Client Discount Category or Patient Discount Category.

Client Discount Category = Uses Client Discount Category (set in Reception > Client Additional Info.

Patient Discount Category = Uses Patient Discount Category (set in Reception > Patient Details.

Surgeon List

Changes the behaviour of the Surgeon pop-up list. This setting selects when/if the surgeon list displays.

a) Disabled' = Surgeon list does not display, surgeon list can be selected form combo boxes.
b) Show After Treating = List shows when entering the patient's treatment history.
c) Show Before Treating = List shows after saving treatment.

Show Treatment Transfer

Enabled = The treatment transfer option is available allowing you to transfer an item from one Patient's record to another.

Disabled = Option is not available for users.

Default Clinical Code

Sets the default Clinical Code for treatment dispensed.

Group Treatment by Type

Enabled = Treatment History displays in date order and then by treatment type, i.e. Consultations.

Disabled = Treatment History displays chronologically.

Save to Pre-Invoice/Estimate from Hospital List

Enabled = Hides the 'Save' button for hospital appointments.

Disabled = Hides the 'Save' button for hospital appointments.

Composite children to have same Qty as parent

Enabled = Forces the child items of a composite to automatically have the same quantity value as the parent when dispensed.

Disabled = Child items will multiply in-line with parent item quantity.

Automatically print Accounts invoice on Save

Enabled = Generates an invoice from the treatment screen once the save button is selected.

Disabled = No action

Include Pre-Invoice Total in draft balance

Enabled = Pre-invoice total is added to the draft balance.

Disabled = Draft balance excludes pre-invoice balance and pre-invoice balance can only be viewed from pre-Invoice tab.

Delete Discount when Treatment Zeroed

Enabled = When a treatment's value is £0.00, any discounts applicable to the item are be removed from the treatment history and accounts screen.

Disabled = Zero value discounts remain on the treatment history and accounts screens.

Show Appointments Prompt when Treating from Reception

Enabled = If a Patient does not have an appointment registered and treatment has been added from Reception, a list of Patient's appointments are displayed and you can select which appointment you have treated.

Disabled = Do not show prompt and treat appointment selected.

Allow future treatment dates

Enabled = Allow user to select a future item date when dispensing treatment.

Disabled = Disable future dates when dispensing treatment.

Do not Display Documents in History

Enabled = Selecting this default will deactivate documents showing in the history tab, they will still be displayed under the documents tab.

Disabled = Documents will display in the treatment history.

Hide treatment totals

Enabled = Hides treatment totals when treatment history is grouped.

Disabled = Displays treatment totals when treatment history is grouped.

Allow multiple discounts per item

Enabled = Allows user to apply more than one discount to a treatment item.

Disabled = Users are unable to apply more than one discount to an item.

Add Reason as Clinical Note

Enabled = The reason for the appointment will automatically be added as a clinical note.

Disabled = No action.

Enforce Opt in grouping for composites.

Enabled = All composites are set as opt-in and enforced when dispensing treatment.

Disabled = Allow users to opt in/out when dispensing composites.

Ignore Consolidation Date for Documents

When ticked, documents can be deleted at any time. If not ticked documents cannot be deleted before the Close Accounting Period.

Ignore Consolidation Date for Write-Offs

When ticked, write-offs can be deleted at any time. If not ticked write-offs cannot be deleted before the Close Accounting Period.

Save Code Entry Attachments to Patient History

When ticked, a draft entry for the document is created when the treatment is added. Once the treatment has been saved, entries are added to the Documents tab and to the History, Pre-Invoice or Saved Estimates tab of the Treatment module.

Show Referral Button

When ticked, this will show the Referral button in the patient history screen, so users can send a referral to another practice.

Prescriptions

Currently use Basic mode