Reporting Settings

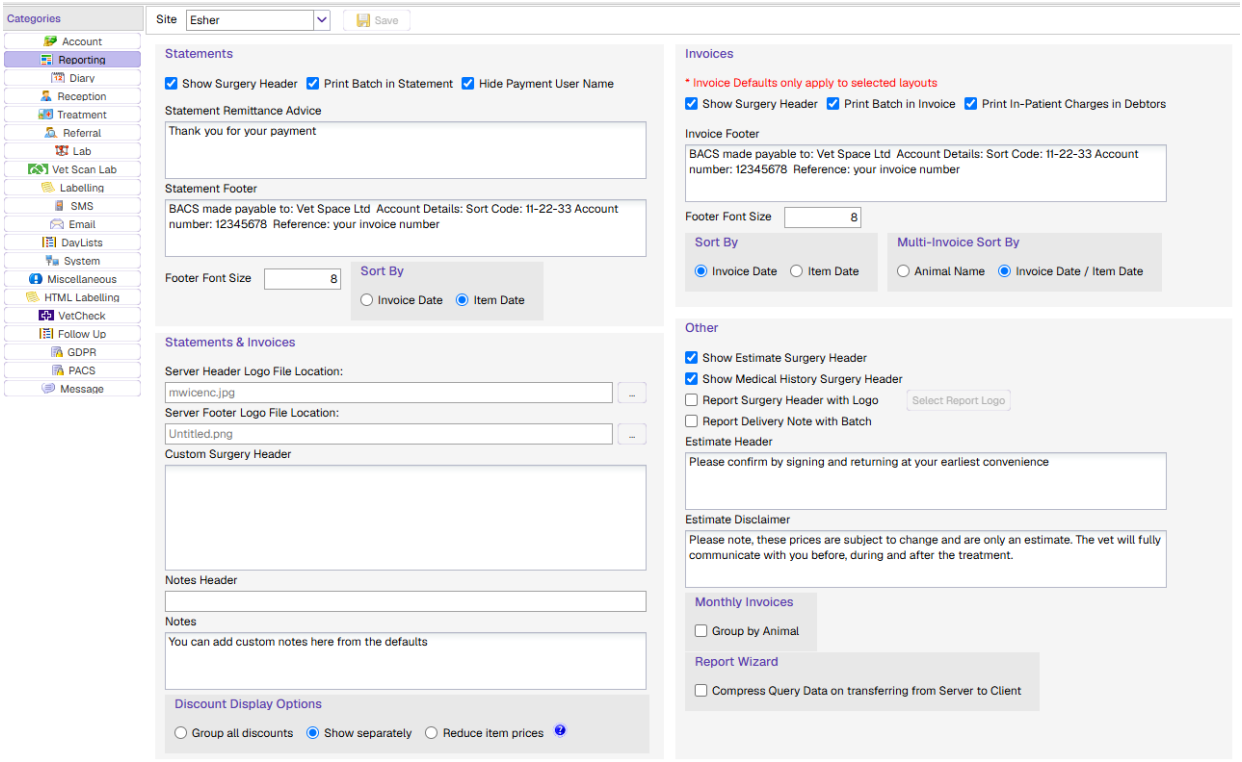
29/10/2026 2:34 pm GMT

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.

Discount Display Options

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

Group all discounts =Invoice and accounts discounts are summed into a single line in the invoice or statement.

Show separately =Discounts are shown Separately in the invoice or Statement.

Reduce item prices= Treatment discounts linked to an item are hidden and reduce the parent line price; account level discounts still appear separately.

Note: Summary and Select transaction reports are not compatible with this setting

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