

Report Mapping Libraries

13/05/2025 8:09 am BST

Summary

This page documents how to specify the report templates you want to use for sending statements and invoices within the system.

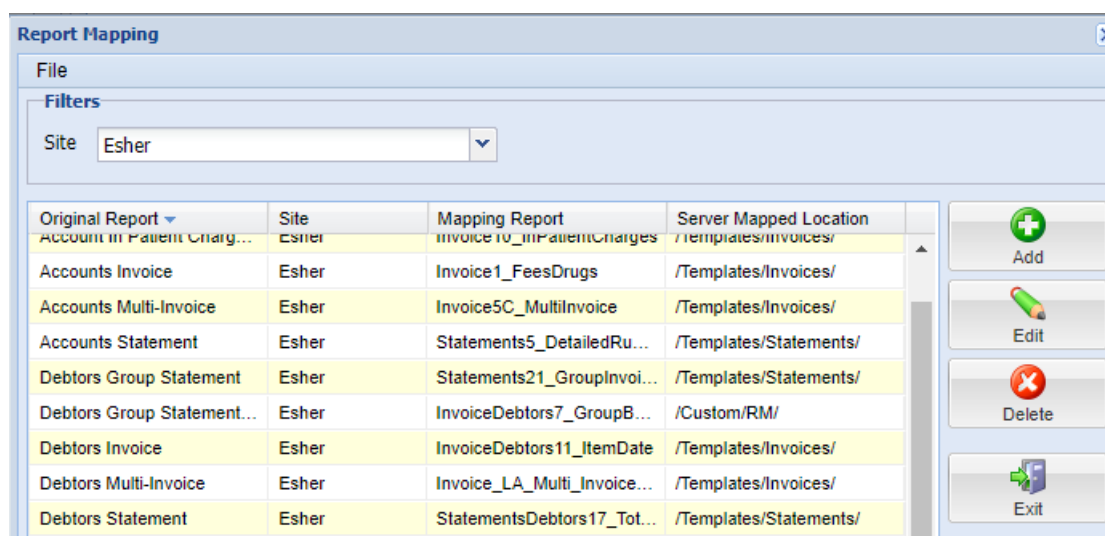
Report Templates can be viewed at the bottom of this page.

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.

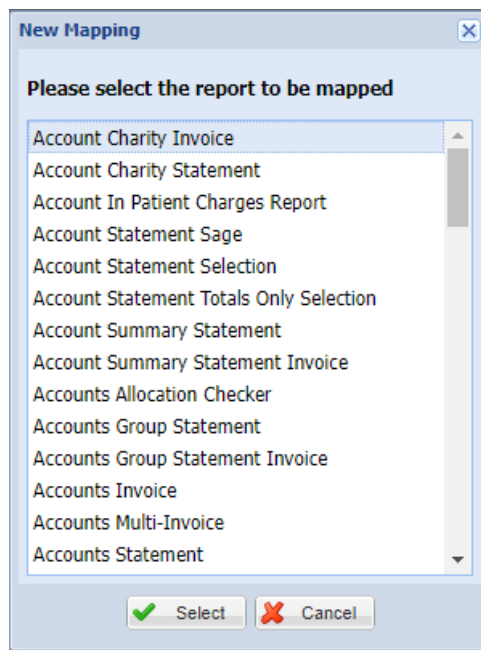


Original Report	Site	Mapping Report	Server Mapped Location
Account in Patient Charg...	Esher	Invoice10_InPatientCharges	/templates/invoices/
Accounts Invoice	Esher	Invoice1_FeesDrugs	/Templates/Invoices/
Accounts Multi-Invoice	Esher	Invoice5C_MultiInvoice	/Templates/Invoices/
Accounts Statement	Esher	Statements5_DetailedRu...	/Templates/Statements/
Debtors Group Statement	Esher	Statements21_GroupInvoi...	/Templates/Statements/
Debtors Group Statement...	Esher	InvoiceDebtors7_GroupB...	/Custom/RM/
Debtors Invoice	Esher	InvoiceDebtors11_ItemDate	/Templates/Invoices/
Debtors Multi-Invoice	Esher	Invoice_LA_Multi_Invoice...	/Templates/Invoices/
Debtors Statement	Esher	StatementsDebtors17_Tot...	/Templates/Statements/

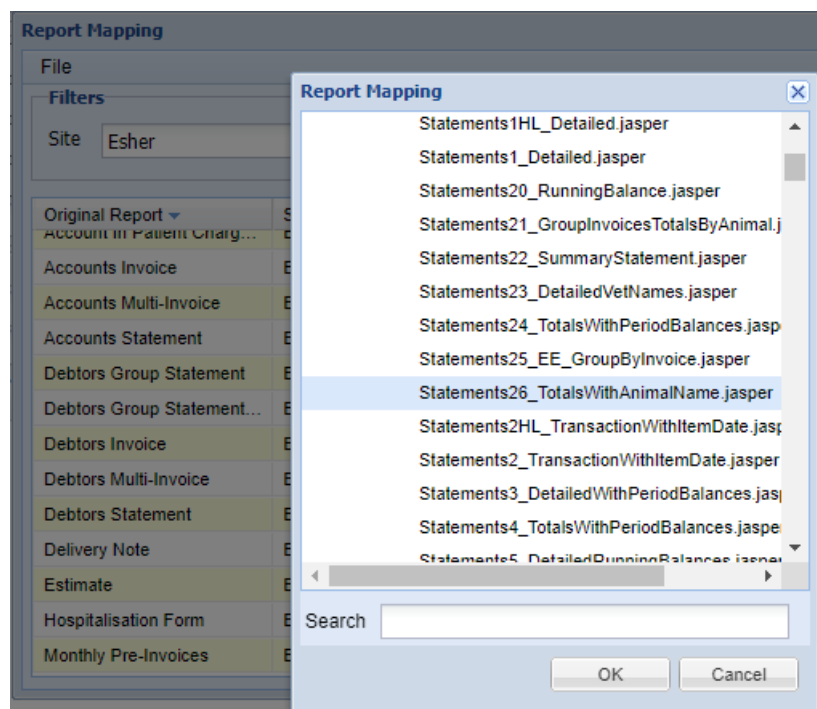
Alternatively, you can contact the help desk to support the implementation of new templates.

Selecting a new/editing your choice of report template

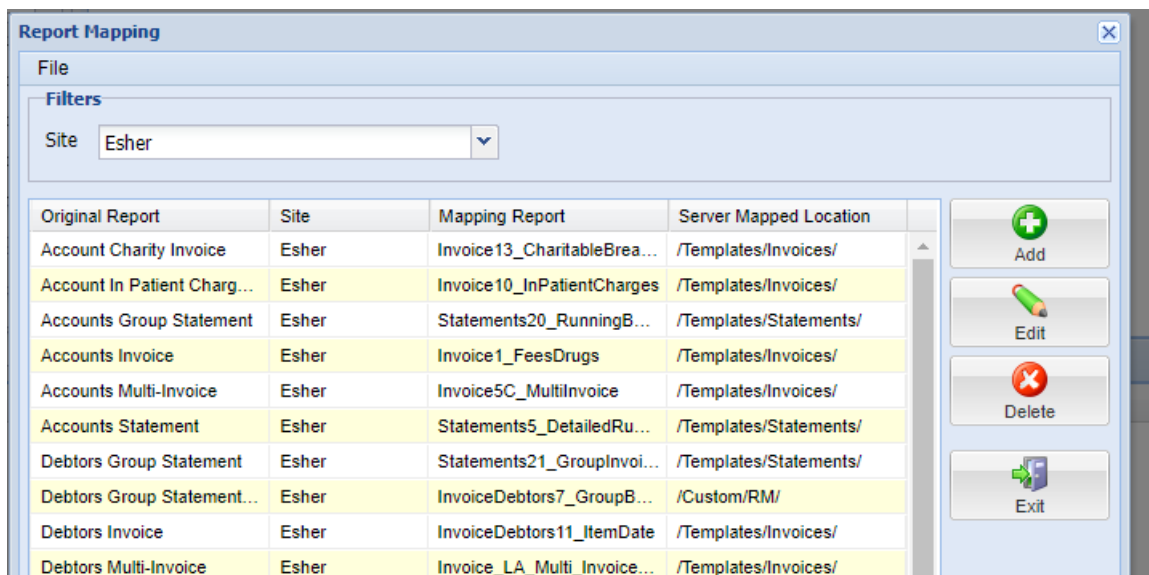
1. Select 'Add' to choose a new layout or 'Edit' to edit existing selection.
2. A menu displays, select the area of the system you want to change the report template for.
3. Select the Report to be mapped and click "Select".



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 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 