Statements / Invoices Default Settings

Last Modified on 11/03/2020 12:33 am EST

Both *Statements - Print* and *Statements - Email* offer several format options which allow you to customize the look of your statements. Many of these options can be set as defaults if much of this information stays the same for the majority of the statements you send. The defaults can be overridden at any time when you are generating *Statements - Print* or *Statements - Email*. Entering default statement settings is a time-saver and is optional.

Set Default Statement Settings

1. Go to the **Gear** (icon) > **Settings** > **General** > **Statements** (left menu).
2. Use the top section (*Print and Email*) to create settings from both printed and emailed statements.
    - Enter default **Statement Header**. The *Statement Header* is displayed near the top of the statement.
    - Enter default **Statement Footer**. The *Statement Footer* is displayed at the bottom of the statement. Typically this text might include a thank you or balance due message.
    - If you want to display an account summary on the statement set **Show Account Summary** to **Yes**.
    - If want to tax to display on statements, set **Show [Tax Label] on Statement** to **Yes**.
    - If you would like *Transaction Notes* to display on statements, set **Show Transaction Notes** to **Yes**.
    - Set the **# of Days of Transaction History** to display on the statement. You can override this setting when creating statements using the *Search Transaction History* setting in *Statements - Print or Statements - Email* reports.
3. Use the second section (*Email Only*) to create settings that apply to email statements only.
    - To add a link to your Parent Portal in your statements set **Include Link to Parent Portal** to **Yes**.
    - Customize the wording for the link in the **Parent Portal Text** field.
4. Use the third section (*Print Only - Address Positioning*) to create settings that apply to printed statements only.
    - Set the position of the family mailing address using the **Top Margin** and **Left Margin** choices.
    - Set the **Statement Fold Line** for envelope mailing.