Customizing Your Statements

Last Modified on 10/18/2019 2:45 pm EDT

Version 14.19

Follow these steps to customize your statements:

1. Access your Statements.

   - Within the application, select **Tools > OP Reports**
   - Log in
   - Select the **Billing_Rpts** Folder
   - Select **Billing_Statement_cp_Family**
   - Right-click and select **Design**

2. Add your practice's logo to the report Design (skip this step if you do not plan to make your logo visible).

   - On the **Design** tab in OP Reports, find the square to the right of the return address.
   - Right-click inside the square and select **Picture**.
   - Choose your logo from your computer and open it.

3. Access the customization tool within your statement reports.

   - From the **Design** tab in OP Reports, click on the **Calc** tab.
   - In the Report Bands box on the upper left hand corner of the window, right-click and select **Module.**
   - Select **Events.**

4. Customize your statements

   - In the box on the left hand side of the screen labeled **procedure** GlobalOnCreate;, find the field you would like to edit.
   - Follow the steps in the table below.

Name of Field	You can	By Changing	to
Cash	Make it visible	showCash := False;	showCash :=True;
Credit Cards (entire section)	Hide it	showCreditCards := True;	showCreditCards := False;
Discover	Make it visible	showDiscover := False;	showDiscover := True;
AMEX	Make it visible	showAMEX := False;	showAMEX := True;
Logo	Make it visible	showLogo := False;	showLogo := True;
Logo Height	Change the size to another height (in inches)	logoHeight := 0.75;	logoHeight := x.xx; Example: logoHeight:= 0.50;
Logo Width	Change the size to another width (in inches)	logoWidth := 0.75;	logoWidth := x.xx; Example: logoWidth := 1.25;
Permanent Message	Insert a message to be written on every statement you send	permanentMessage := '';	permanentMessage := 'Type your message here!';
Due Days	Change "Due Date: Upon Receipt" to a calculation that will add your desired number of days to the date you print a statement.	dueDays := 0;	dueDays := xx; Example: A statement printed on 3/10/2015 with dueDays := 30 would print as Due Date: 4/10/2015

Version 14.10

Follow these steps to customize your statements:

1. Access your Statements.

    - In the application, select **Tools > OP Reports**
    - Log in
    - Select the **Billing_Rpts Folder**
    - Select **Billing_Statement_cp_Family**
    - Right-click and select **Design**

2. Add your practice's logo to the report Design (Skip this step if you do not plan to make your logo visible).

- On the Design tab in OP Reports, find the square to the right of the return address
- Right-click inside the square and select **Picture**
- Choose your logo from your computer and open it

3. Access the customization tool within your statement reports.

- From the Design tab in OP Reports click the **Calc** Tab
- In the Report Bands box on the upper left hand corner of the window, right-click and select **Module**
- Select **Events**

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Permanent Message	Insert a message to be written on every statement you send	permanentMessage := '';	permanentMessage := 'Type your message here!';

Name of Field	You can	By Changing	to
	Change "Due Date: Upon Receipt" to a calculation that will add		dueDays := xx;
Due Days	your desired number of days to the date you print a statement.	dueDays := 0;	Example: A statement printed on 3/10/2015 with dueDays := 30 would print as Due Date: 4/10/2015