

Statement Settings

Last Modified on 05/13/2021 8:20 am EDT

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.

General Settings for Statements can be found under the *Gear (icon) > Settings > General > Statements (left menu)*:

General Settings

← RETURN **SAVE CHANGES**

- CLOSED DATES
- DASHBOARD ANNOUNCEMENTS
- DROP-DOWN LISTS
- LOCATIONS
- NOTIFICATIONS
- ORGANIZATION DEFAULTS
- ORGANIZATION LOGO
- STATEMENTS**
- TEXT MESSAGES
- TUITION SETTINGS
- USER-DEFINED FIELDS
- USER IDS

Statements
These settings control how your Statements look when printed or emailed.

Print and Email

Statement Header:

Statement Footer:

Show Account Summary: Yes

Show Tax on Statement: No

Show Transaction Notes: No

of Days of Transaction History:

Email Only

Include Link to Parent Portal: Yes

Parent Portal Text:

Print Only - Address Positioning

Top Margin:

Left Margin:

Statement Fold Line:

Click the pencil to input the Header content.

Click the pencil to input the Footer content.

Default settings can be overridden by a User at any time when creating printed or emailed statements.

For more information on creating statements see [Statements/Invoices](#).