Create custom invoices

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Create a customised invoice for a practitioner that includes their own header and footer information. This is useful if the practitioner is not an employee and/or is paid directly into their own bank account.

Video guide

Step 1 - Enable customised invoices

The step enables the use of custom invoices at a branch. Once enabled, customised invoices will be used for practitioners that have them, and the branch invoice will be used for practitioners who do not.
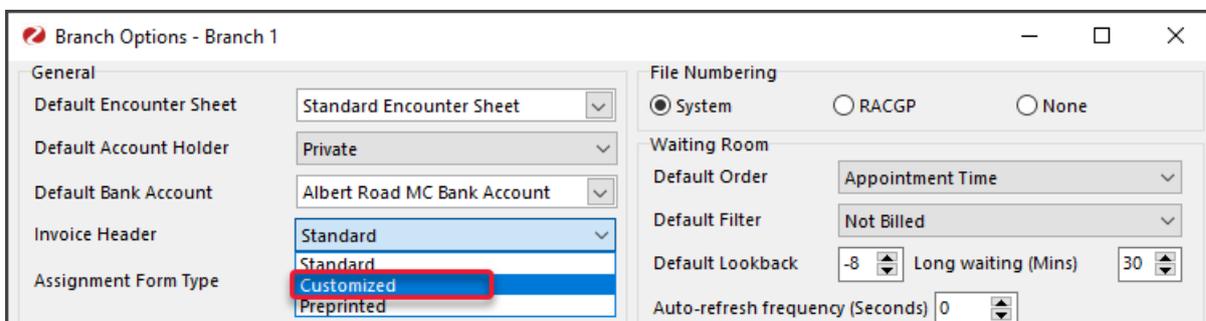
To enable customised invoices:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** > **Branches.**

   The **Practice Details** screen will open.
3. In the **Name** field, select the branch.
4. Select the **Options** button.

   The **Branch Options** screen will open.
5. Select **Customised** in the **Invoice Header** drop-down field.

6. Select **Close** to save.
7. Repeat the steps for each branch as shown in step 3.

Step 2 - Add a practitioner's custom text/image

This step adds the header, footer and image (banner) to be used in the practitioner's invoices.

1. Select **Practice Setup,** then **Doctors** > **Find Treating Doctors**.

   The **Find Doctor Detail** screen will open.
2. In the **Dr Code** field, select the doctor's initials.
3. Select the **Invoice Header/Footer** button.

   The **Invoice Editor** will open.

4. Enter the practitioner's custom header text.

   What to enter

   Because the default header is being replaced, ensure the invoice still contains the required information for a tax invoice.

   a. Enter the custom Text into the default Header text box

   How to enter the text

   - Use the editor's format and alignment options to set the font, size, position, etc.
   - Use your keyboard's space bar to move text to the right (no tab).
   - Test-adjust what is entered so the invoice displays and prints as intended.

   b. Tick the **"Replace invoice header with the text"** option on the bottom left.

5. **Header Option: Add a banner image to the header instead of custom text (** Zedmed v39 and later**).**

   The image must be a JPG with a maximum size of 147px x 714px and will be used in place of the custom header text.

   a. Select the **Image** tab.
   b. Select **Upload** to locate and select the image.

      Cloud users will need to upload the file to Temporary Files first.
   c. Tick "**Replace invoice header with this image**" on the bottom-left.
   d. Select **Preview** to check that the image displays as intended.
   e. Select **OK** to save.

6. Enter the practitioner's custom footer text.
    a. Select **Invoice Footer**.

        The **Invoice Footer Editor** will open
    b. Enter the practitioner's custom footer text.

        This will often be remittance advice and payment information. You should check the branch footer text for guidance.
    c. Select **Enable Custom Invoice Footer for this branch** to use the footer for receipts and in the Account Inquiry screen - not just the original invoice.
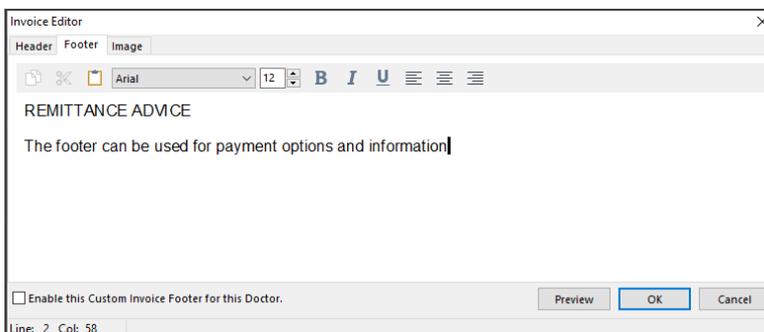
7. Select **Close** to save and exit.

Step 3 - Add an invoice message (optional)

You can use the Invoice Message field to further customise an invoice for a branch. This is the yellow box on the lower part of the invoice and can contain information you want to stand out. It is not for a specific practitioner but it can be used to add important information.

To add an Invoice Message:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** > **Branches**

    The **Practice Details** screen will open.
3. In the **Name** field, select the branch.
4. Select the **Options** button.
5. Select the **Invoice Message** button.

    The **Invoice Message** field will open.
6. Enter the message you want to appear.

    For example - 'TAX INVOICE' if this is not in your header.
7. Select **Show on Invoice Reprint** if you also want the Invoice Message to appear on invoice reprints.

Step 4 - Check the invoice

View and print a test invoice to ensure it displays as intended.

We recommend checking:

- The invoice information matches the selected practitioners (if you are setting up multiple practitioners).
- The invoice is correct for each branch (if you have multiple branches).
- The invoice meets the requirements for a tax invoice (check with the accounting staff/specialist if you are unsure).