

Customised invoices

Last Modified on 20/10/2023 3:38 pm AEDT

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:

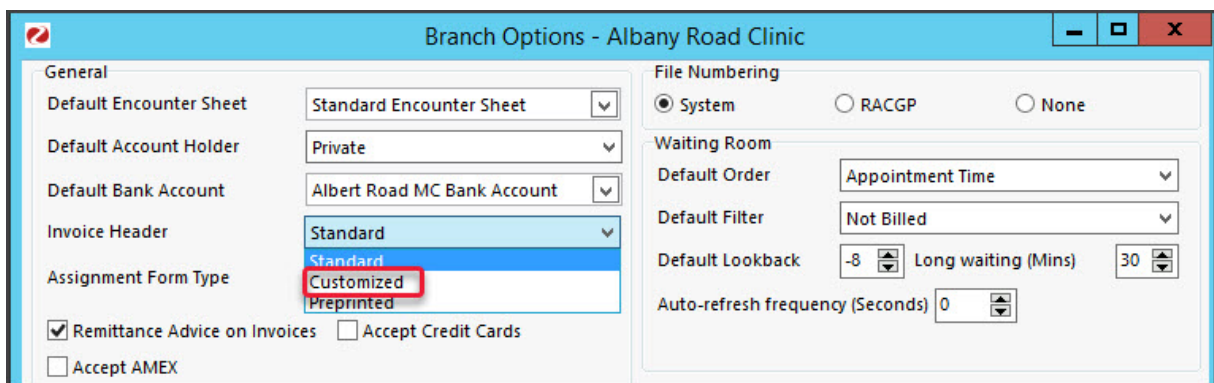
1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup > Branches**.

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 **Customized** in the **Invoice Header** drop-down field.
6. Select **Close** to save.
7. Repeat the steps for each branch as shown in step 3.



The screenshot shows the 'Branch Options - Albany Road Clinic' window. The 'General' tab is active. The 'Invoice Header' dropdown menu is open, showing three options: 'Standard', 'Customized', and 'Preprinted'. The 'Customized' option is highlighted with a red box. Other settings include 'Default Encounter Sheet' (Standard Encounter Sheet), 'Default Account Holder' (Private), 'Default Bank Account' (Albert Road MC Bank Account), 'Assignment Form Type' (Standard), 'Remittance Advice on Invoices' (checked), 'Accept Credit Cards' (unchecked), 'Accept AMEX' (unchecked), 'File Numbering' (System selected), 'Waiting Room' (Appointment Time), 'Default Order' (Not Billed), 'Default Filter' (Not Billed), 'Default Lookback' (-8), 'Long waiting (Mins)' (30), and 'Auto-refresh frequency (Seconds)' (0).

Step 2 - Add each practitioner's customised text

This step defines the header and footer information for in the practitioner's invoice.

To customise an invoice:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Doctors > Find Treating Doctors**.

The **Find Doctor Detail** screen will open.

3. In the **Dr Code** field, select the doctor's initials.

The doctor's profile will open.

4. Select **Invoice Header**.

The **Invoice Heading Editor** will open.

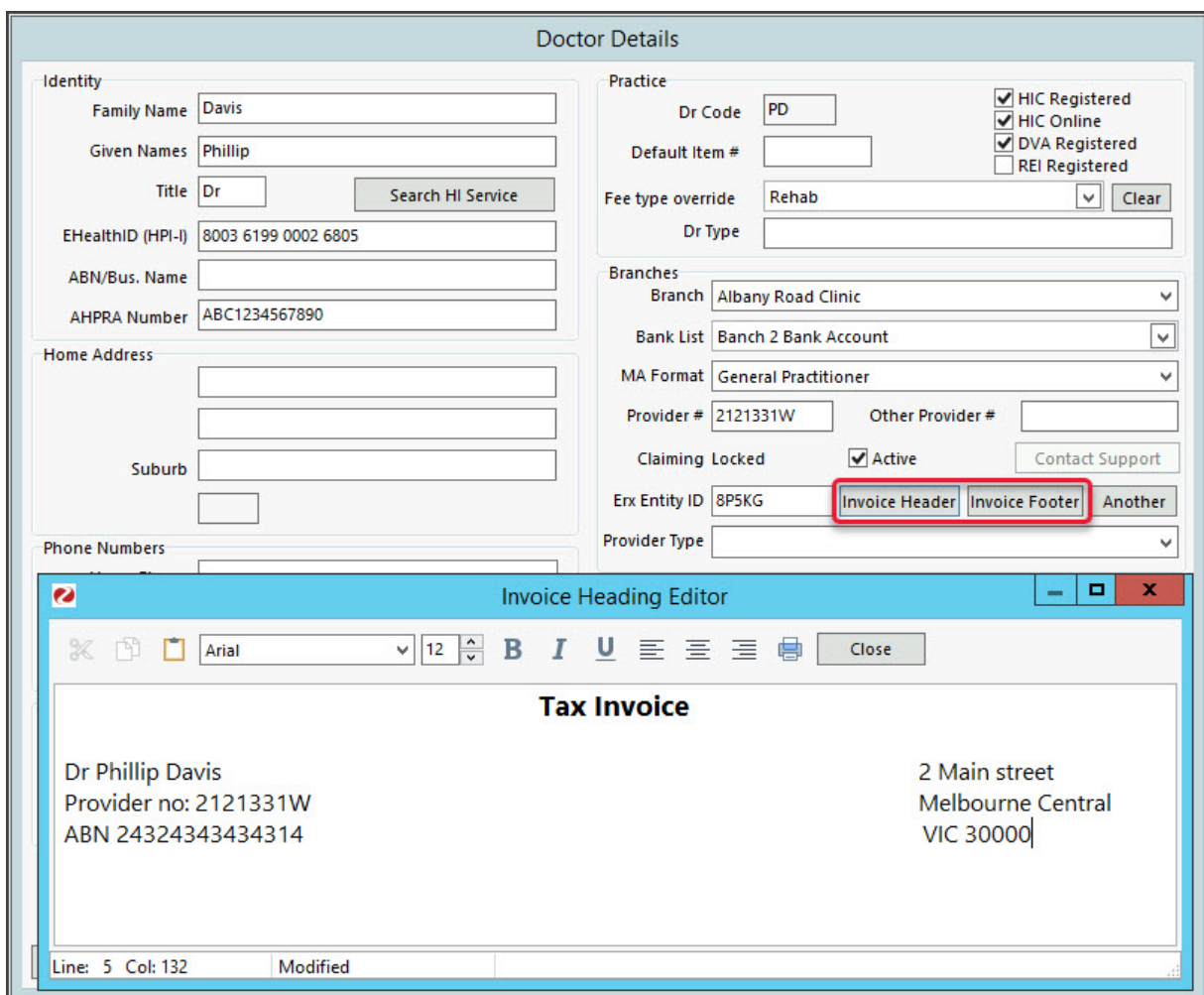
5. Enter in the header text.

What to enter

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

How to enter the ext

- 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.



6. Select **Invoice Footer**.

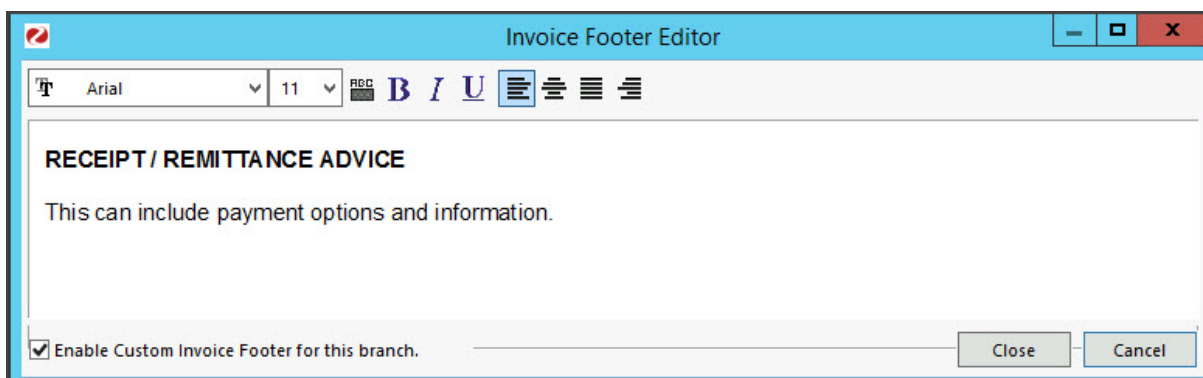
The **Invoice Footer Editor** will open

7. Enter in the practitioner's footer text.

This will often be remittance advice and payment information. You should check the branch footer text for guidance.

Select **Enable Custom Invoice Footer for this branch** if you want the footer to be used on receipts and in the

Account Inquiry screen - not just the original invoice.



8. 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).

Tax Invoice

Dr Phillip Davis
Provider no: 2121331W
ABN 24324343434314

2 Main street
Melbourne Central
VIC 30000

Printed On : 4/08/2023
Page : 1

Header

Duplicate Account

Mr Knut Holloway
5 Jacob Pl
BUGLE RANGES 5251

Patient :

Mr Knut Holloway
5 Jacob Pl
BUGLE RANGES 5251
File # : 4
Medicare # : 5950 28614 2 1
DoB : 19/05/1952

Referred By :

Dr Vivian Mortier
Provider # : 2121331W
Letter date: 6/07/2023 for 12 months

Fund Details :

Fund Name : HCF
Membership # : 654565

Invoice #	Service Date	Item	Description	Unit	Qty	GST	Value
40269	4/08/2023		23 Level B Surgery Consultation				\$71.30
TOTAL:							\$71.30

Invoice Message

Invoice Message text

No items on this account attract GST.	THIS ACCOUNT BALANCE :	\$71.30
	UNPAID ACCOUNTS :	\$1766.85
	UNALLOCATED CREDITS :	-\$2672.70
	AMOUNT DUE :	-\$834.55

Footer

RECEIPT / REMITTANCE ADVICE

This can include payment options and information.