Invoice email templates

Version: 1 | Last Modified on 23/11/2026 11:34 am AEDT

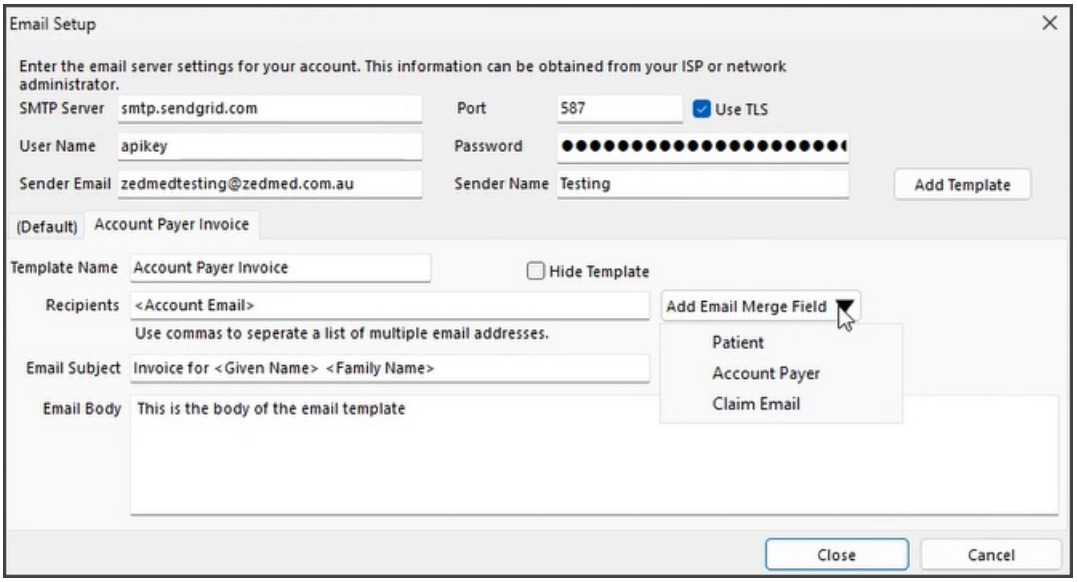
When sending invoices from New Invoice or QuickPay, you can now use email templates that set your preferred recipients and support file attachments. Requires Zedmed v39.9.0 and later.

Create an email template

To create a custom email template:

1. Go to **Practice** > **Branches** and select **Email setup.**
2. Select **Add Template** and give the template a name.
3. Use **Add Email Merge Field** to choose the recipient email address to use. Merge fields info.

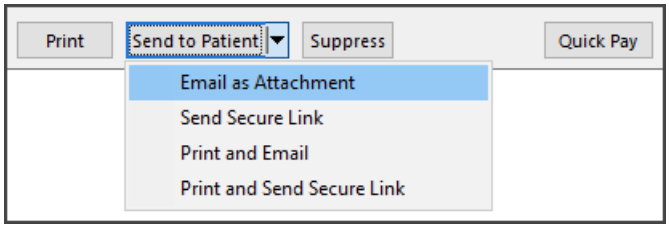
   There can be multiple recipients, and you can also type in a recipient email address.
4. Add an **Email Subject** (supports merge fields).
5. Add the **Email Body.**
6. Select **Close** to save the template and exit.



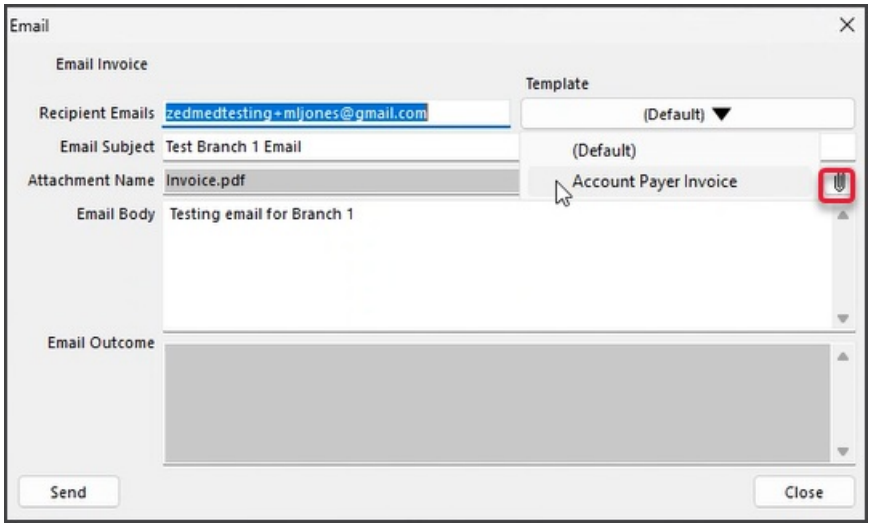
Send an invoice email using a template

To use a custom template when invoicing on the New Invoice or QuickPay screens:

1. Create an invoice.
2. Select **Send to Patient > Email as Attachment.**



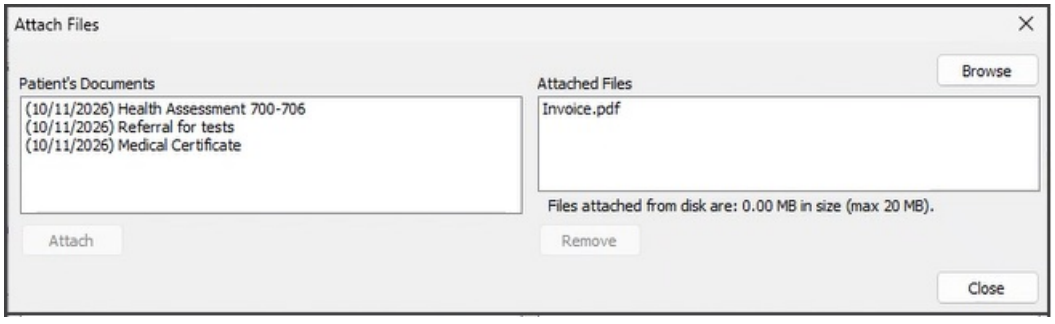
This will open the **Email** dialog.



3. **Under Template,** select the email template to use.

   This will populate the Email screen with the template's content.
4. **To attach a document** (optional):
   a. Select the **paperclip icon**
   b. The **Attach Files** screen will open, showing the **Forms** and **Letters** in the patient's **Summary Views Documents** tab.

      The **Browse** button allows you to also locate files on the local machine (or uploaded files in Zedmed Cloud)
   c. Select the form, then select **Attach** to move it into the **Attached Files** window. This is a 20 MB size limit.
   d. Select **Close** to add the attachments to the email
5. **Close** will take you back to the **Email** screen for a final review.



6. Select **Send** on the Email screen.

Account Payer merge fields

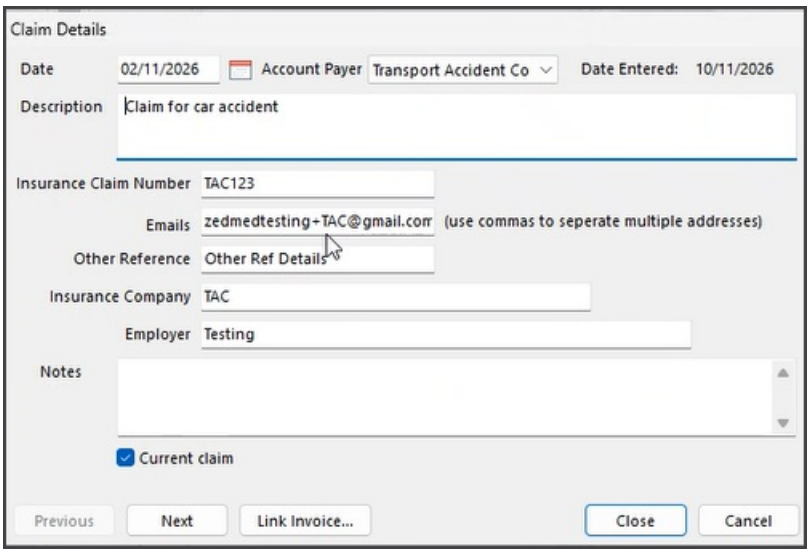
The email templates let you choose from the following three merge fields to add the email recipient.

Patient

This allows you to use the patient's email address. It can also be the patient's account payer, so if a child is the patient and the parent is the account payer, the invoice will be sent to the parent.

Claim Email

The email address added in the Claim Details for the claim recorded against a patient.



Account Payer

The email address field in Account Payer Details - Management > Debtors > Account Payers. For example, if you are emailing a third party like an insurer, you can add their email address here and use the Account Payer merge field to automatically email the insurer.

