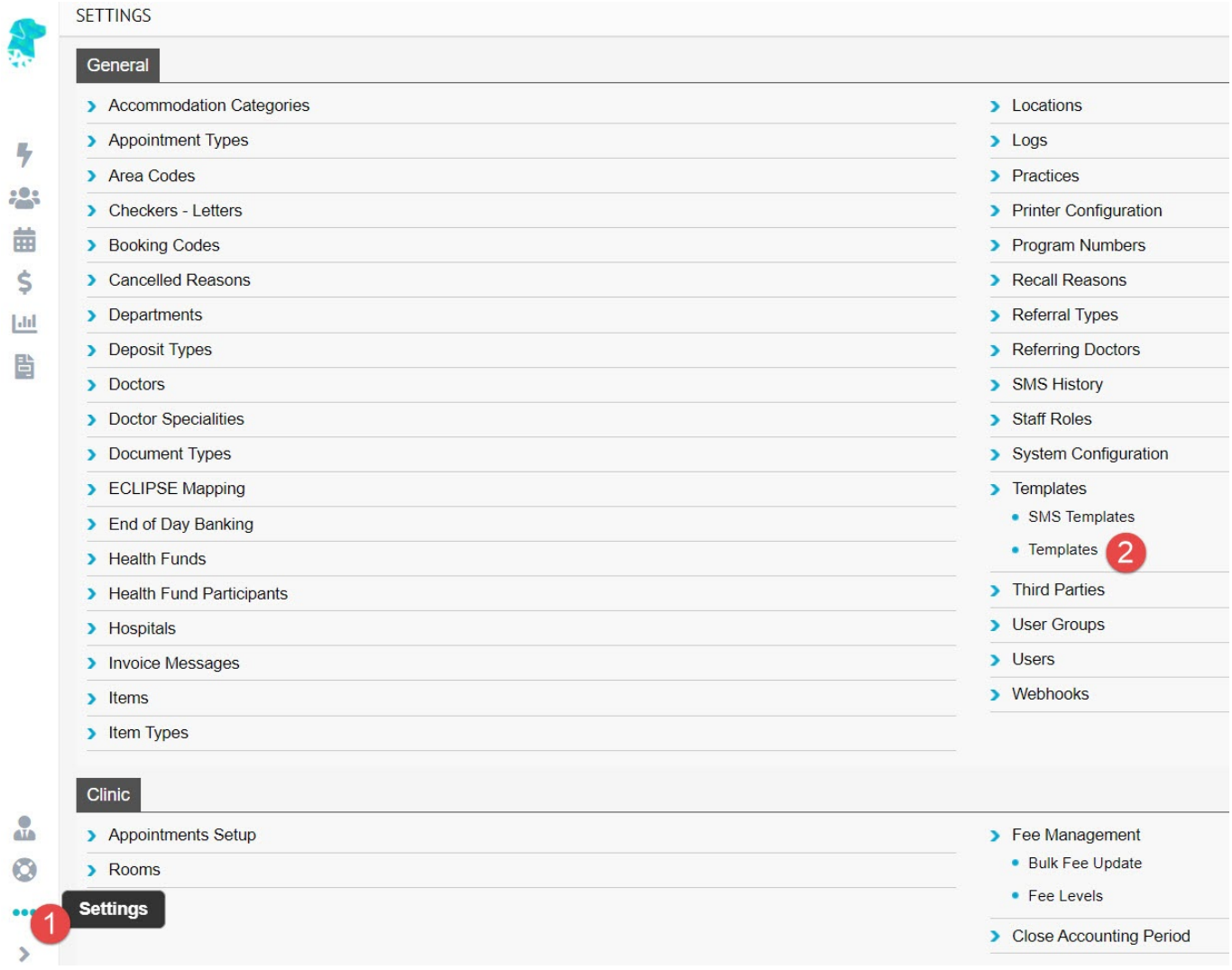
Uploading a Clinic Invoice Template

While you can create your own invoice templates from scratch in Microsoft Word, you may also contact FYDO support and request an invoice template be uploaded to your FYDO account, for you.

This template will allow you to print invoices right away. You may further customise this template as desired, should you choose to.

Uploading / editing clinic invoice templates

To upload or edit existing templates, you will need to go to **Settings > Templates**.



This will reveal the templates currently in your FYDO account.

Note: an invoice template is necessary for each *type* of invoice; such as Medicare, DVA, and Private.

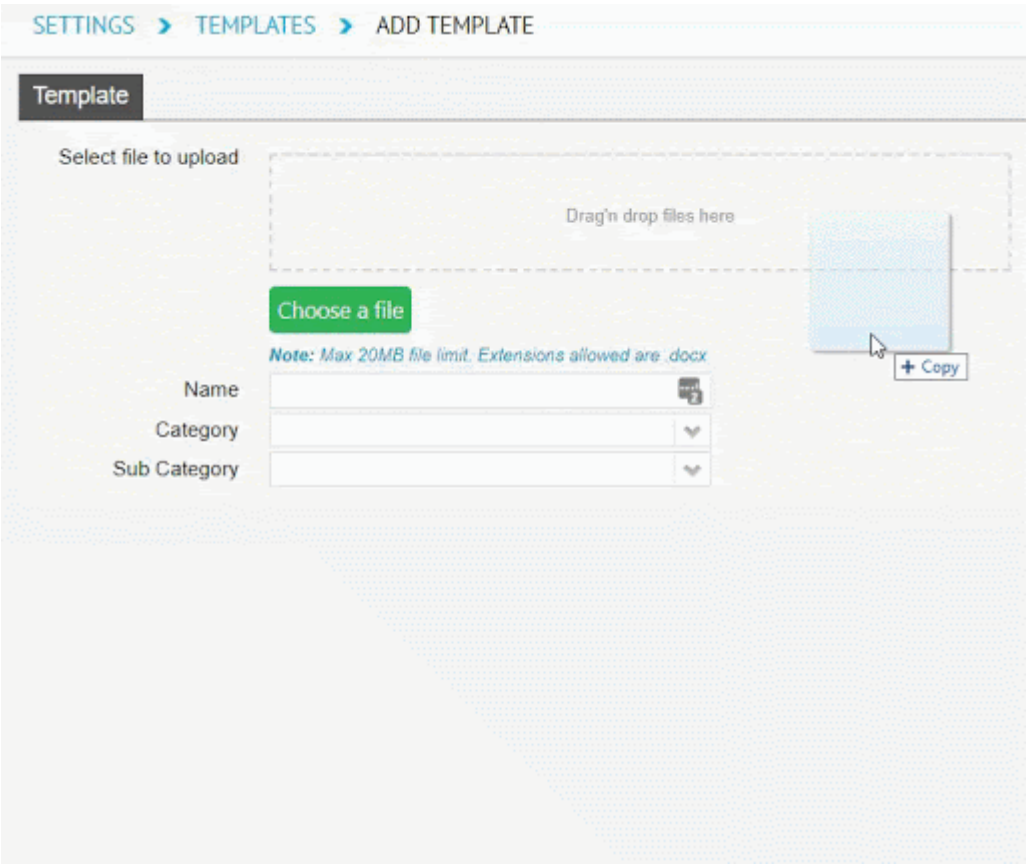
Adding a new template

So you may upload a template by clicking on the **Add Template button** to the top right corner of the screen.



Then, you will need to browse your computer for the template file or simply drag it in, as shown below.

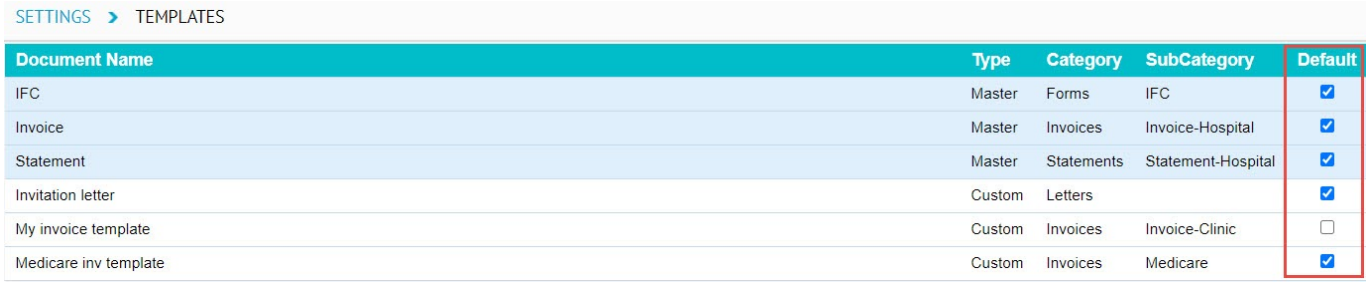
Give it a **Name**, select a **Category** (invoices in this case) and a **Sub Category** (whether it is DVA, Medicare, Private, etc.).



Once you have entered the above details, hit the green **Save** button and you are all done!

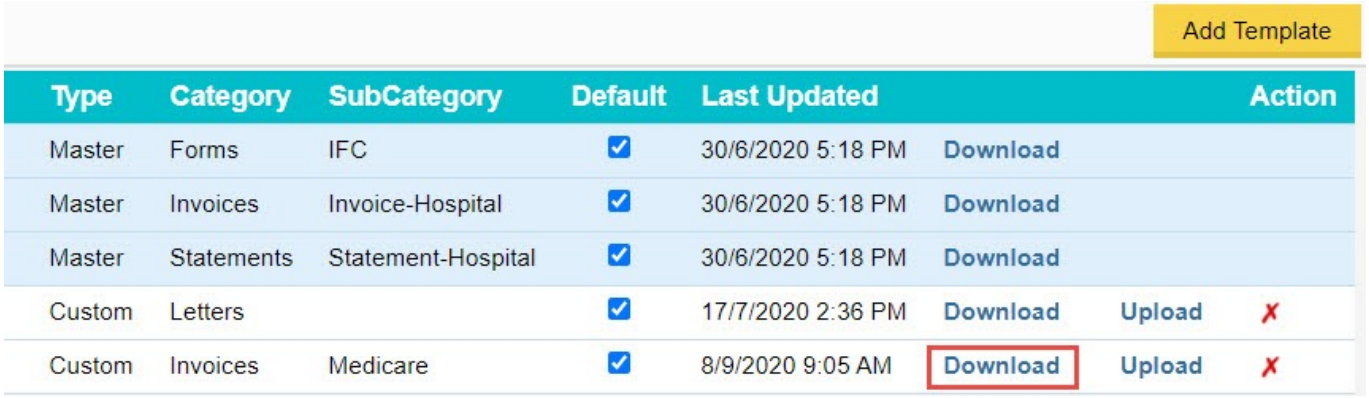


You may also mark a given template as the **default template** for its *category and sub category*.



Editing an existing template

To make edits to existing templates, you will need to download the Word file by clicking on the **Download** button associated with the template.



Once you have downloaded the file, go ahead and open it, make the desired edits and **save** the document.

You may type whatever you'd like in plain text or add '**tokens**' to print things onto the invoice that change from invoice to invoice like patient **names**, **medicare/ health fund card numbers**, **servicing doctor**, etc.

Click here to view the list of tokens for clinic invoices, *or*

Click here to view the list of tokens for hospital invoices

Once the document has been updated with the desired edits, it is ready to be re-uploaded. You can do this by going back to where you downloaded the template at **Settings > Templates**, finding the template downloaded and hitting its associated **Upload** button.

Add Template

Type	Category	SubCategory	Default	Last Updated			Action
Master	Forms	IFC	☑	30/6/2020 5:18 PM	Download		
Master	Invoices	Invoice-Hospital	☑	30/6/2020 5:18 PM	Download		
Master	Statements	Statement-Hospital	☑	30/6/2020 5:18 PM	Download		
Custom	Letters		☑	17/7/2020 2:36 PM	Download	Upload	✗
Custom	Invoices	Medicare	☑	8/9/2020 9:05 AM	Download	Upload	✗