

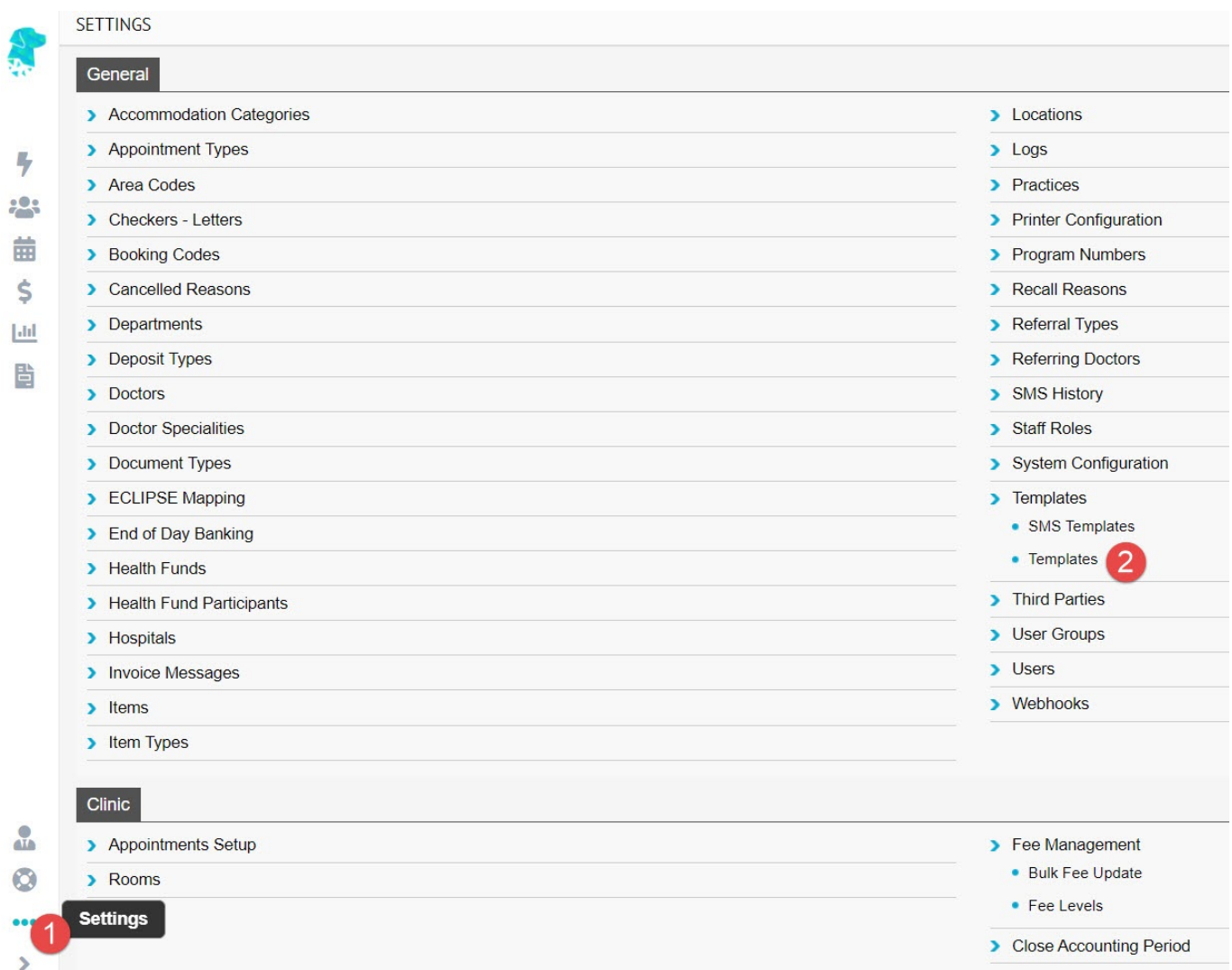
Uploading a Clinic Invoice Template

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**.



The screenshot displays the 'SETTINGS' interface. On the left is a vertical sidebar with icons for various settings categories. The main area is divided into three sections: 'General', 'Clinic', and 'Settings'. The 'Settings' section is highlighted with a red circle containing the number '1'. Within the 'Settings' section, the 'Templates' option is highlighted with a red circle containing the number '2'. The 'Templates' option has a sub-menu with 'SMS Templates' and 'Templates'.

Settings Category	Item
General	Accommodation Categories
	Appointment Types
	Area Codes
	Checkers - Letters
	Booking Codes
	Cancelled Reasons
	Departments
	Deposit Types
	Doctors
	Doctor Specialities
	Document Types
	ECLIPSE Mapping
	End of Day Banking
	Health Funds
	Health Fund Participants
	Hospitals
	Invoice Messages
	Items
	Item Types
	Locations
Logs	
Practices	
Printer Configuration	
Program Numbers	
Recall Reasons	
Referral Types	
Referring Doctors	
SMS History	
Staff Roles	
System Configuration	
Templates	
SMS Templates	
Templates	
Third Parties	
User Groups	
Users	
Webhooks	
Clinic	Appointments Setup
	Rooms
Settings	Fee Management
	Bulk Fee Update
	Fee Levels
Close Accounting Period	

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.

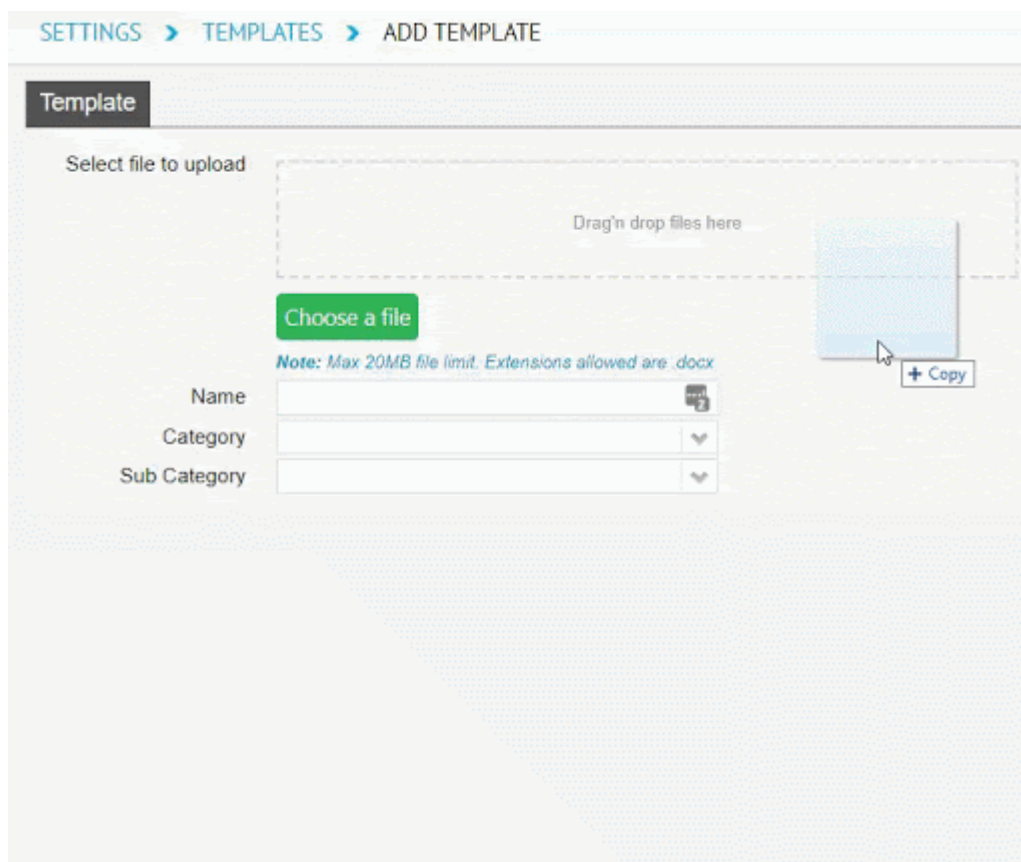
Adding a new template

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

Add Template

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.).



The screenshot shows a web interface for adding a new template. At the top, there is a breadcrumb trail: 'SETTINGS > TEMPLATES > ADD TEMPLATE'. Below this is a header 'Template'. The main area is titled 'Select file to upload' and contains a dashed box with the text 'Drag'n drop files here'. To the right of this box is a blue folder icon with a '+ Copy' button. Below the dashed box is a green 'Choose a file' button. A note below the button reads: 'Note: Max 20MB file limit. Extensions allowed are .docx'. Below the note are three input fields: 'Name' (a text input), 'Category' (a dropdown menu), and 'Sub Category' (a dropdown menu).

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

Save

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

Document Name	Type	Category	SubCategory	Default
IFC	Master	Forms	IFC	<input checked="" type="checkbox"/>
Invoice	Master	Invoices	Invoice-Hospital	<input checked="" type="checkbox"/>
Statement	Master	Statements	Statement-Hospital	<input checked="" type="checkbox"/>
Invitation letter	Custom	Letters		<input checked="" type="checkbox"/>
My invoice template	Custom	Invoices	Invoice-Clinic	<input type="checkbox"/>
Medicare inv template	Custom	Invoices	Medicare	<input checked="" type="checkbox"/>

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.

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

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	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download		
Master	Invoices	Invoice-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download		
Master	Statements	Statement-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download		
Custom	Letters		<input checked="" type="checkbox"/>	17/7/2020 2:36 PM	Download	Upload	X
Custom	Invoices	Medicare	<input checked="" type="checkbox"/>	8/9/2020 9:05 AM	Download	Upload	X