

AI Agent support

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Zedmed supports a range of third-party AI Agent solutions such as **Trimate** and **Facere** that require API integration.

Who do I contact for support?

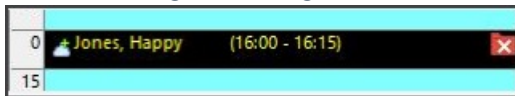
For any problems with the AI agent or the phone system integration, please contact your AI Agent service provider .

For problems with a booking that has appeared in the Appointment Grid, such as reconciliation, please contact **Zedmed support**

How do AI Agents work with Zedmed

Any appointments made via the AI agent over the phone will be added to the Appointment Grid and indicated by a cloud icon. The first time a user makes an appointment using the AI agent over the phone, they will need to be reconciled with their patient record.

First-time AI Agent booking- cloud and + icon.



Once reconciled, future bookings-- no icon



How do I manage patient bookings?

Follow the **Online Patient Reconciliation process** for first-time AI agent bookings. This guide explains the workflow for patients who make their first appointment using the AI phone agent and need to be reconciled with their patient record. This reconciliation only needs to be performed once. If the patient is new, a **patient record** will need to be created.

How to integrate an AI Agent with Zedmed?

The AI provider will set up their integration for you. Part of the process involves creating an API user in Zedmed's security module and getting a copy of the database ID. That user account is only used to provide an API key and requires no action by the practice unless advised by support.

To get the database ID:

Log in to the Zedmed environment and note the Database ID as shown on the bottom right of the landing page.



To add an API Access account:

1. Open the **Utilities** tab > **Security** module
 2. Select the **API Access** tab.
 3. Select **Add** to open the **Edit API User** screen.
 4. Give the API account a name and description.
 5. Add the **Zedmed API Access for AU User** role.
 6. Select **OK**.
 7. An **API Key** dialog will open and display an API key string.
 8. Copy the key.
 9. Select **Close** on the dialog.
- This key is only displayed once and should be saved.
 - How it is applied to the AI Agent will depend on the provider's own setup process.

