

# How to request a credit card

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Request credit card information from a patient when booking an appointment. This workflow requires the **Payment Gateway** integration and enables the **ePayment** billing option.

**Note:** Credit cards are recorded in Zedmed using a secure token that only contains a card's type, last 4 digits and expiry date. The credit card can be used for payment until it expires.

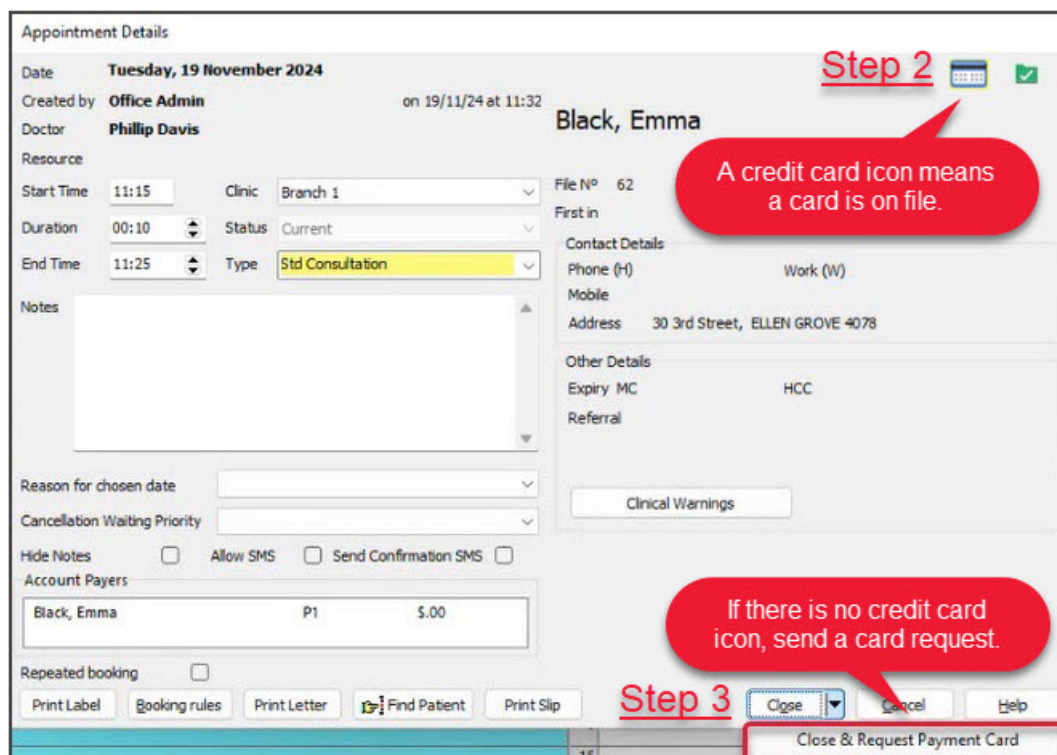
## How to request credit card information

**Step 1** - Book an appointment for a patient.

**Step 2** - In the **Appointment Details** screen, check if there is a credit card icon.  
If there is no icon, there is no valid credit card on file so proceed to step 3.

**Step 3** - Select the arrow beside **Close** and select **Close & Request Payment Card**.

The appointment will be created, and the patient will receive an SMS asking them to enter credit card information.



Appointment Details

Date: **Tuesday, 19 November 2024**

Created by: **Office Admin** on 19/11/24 at 11:32

Doctor: **Phillip Davis**

Patient: **Black, Emma**

Resource: Start Time: 11:15, Clinic: Branch 1, Duration: 00:10, Status: Current, End Time: 11:25, Type: Std Consultation

Notes: [Empty text area]

Reason for chosen date: [Dropdown menu]

Cancellation Waiting Priority: [Dropdown menu]

Hide Notes: ☐ Allow SMS: ☐ Send Confirmation SMS: ☐

Account Payers: Black, Emma P1 \$0.00

Repeated booking: ☐

Buttons: Print Label, Booking rules, Print Letter, Find Patient, Print Slip

Bottom Bar: Close (dropdown), Cancel, Help

Close & Request Payment Card (highlighted)

For onboarding and setup, see the **PG admin guides**.

