

How to request a credit card

Last Modified on 31/01/2025 11:28 am AEDT

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 last 4 digits and expiry date. The credit card can be used for payment until it expires.

How to request credit card information

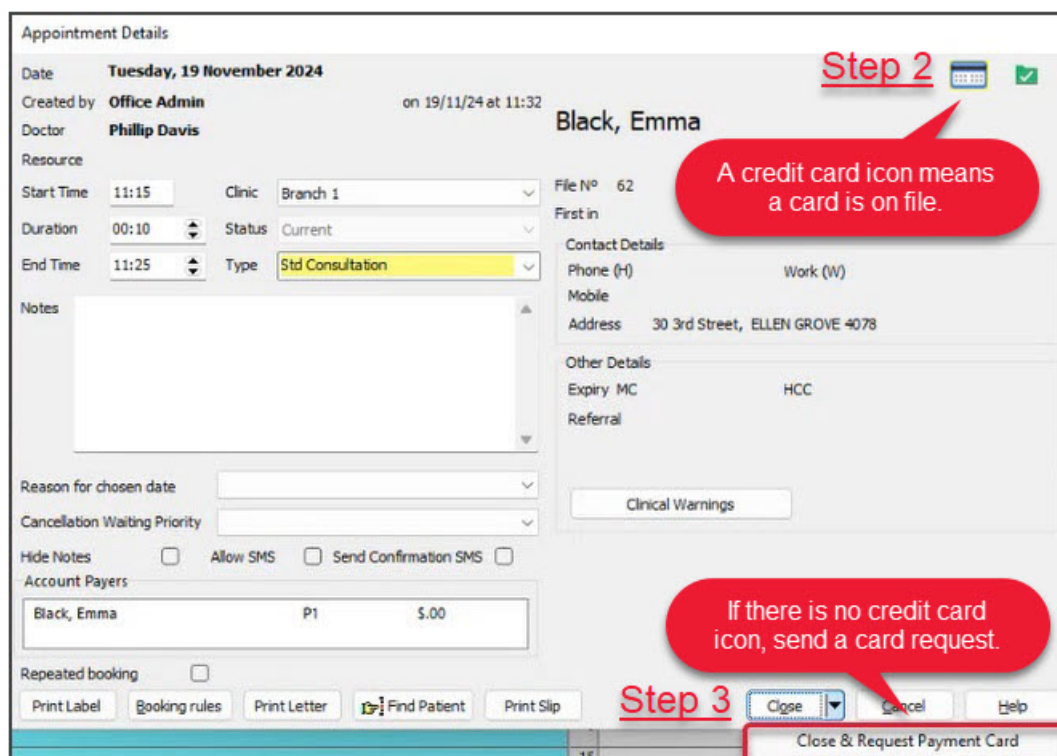
Step 1 - Book an appointment for a patient.

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**

Resource

Start Time 11:15 Clinic Branch 1 File No 62

Duration 00:10 Status Current First in

End Time 11:25 Type Std Consultation

Notes

Reason for chosen date

Cancellation Waiting Priority



Hide Notes Allow SMS Send Confirmation SMS

Account Payers

Black, Emma P1 \$5.00

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip

Step 2  

Black, Emma

A credit card icon means a card is on file.

Other Details

Expiry MC HCC

Referral

Clinical Warnings

Step 3 **Close** **Cancel** **Help**

Close & Request Payment Card