

Take an ePayment deposit

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Process an ePayment deposit when a patient makes an appointment, and apply it when billing.

Step 1 - Take the prepayment

This will charge the patient's card but not allocate the amount to an invoice so it becomes a credit on the patient's account.

1. Open the patient's record.
2. Select **Receipt** from the top menu.

The **Receipt Payment** screen will open.

3. Select a **Banklist**.
4. Enter an **Amount** and press Tab.
5. Select **ePayment**.

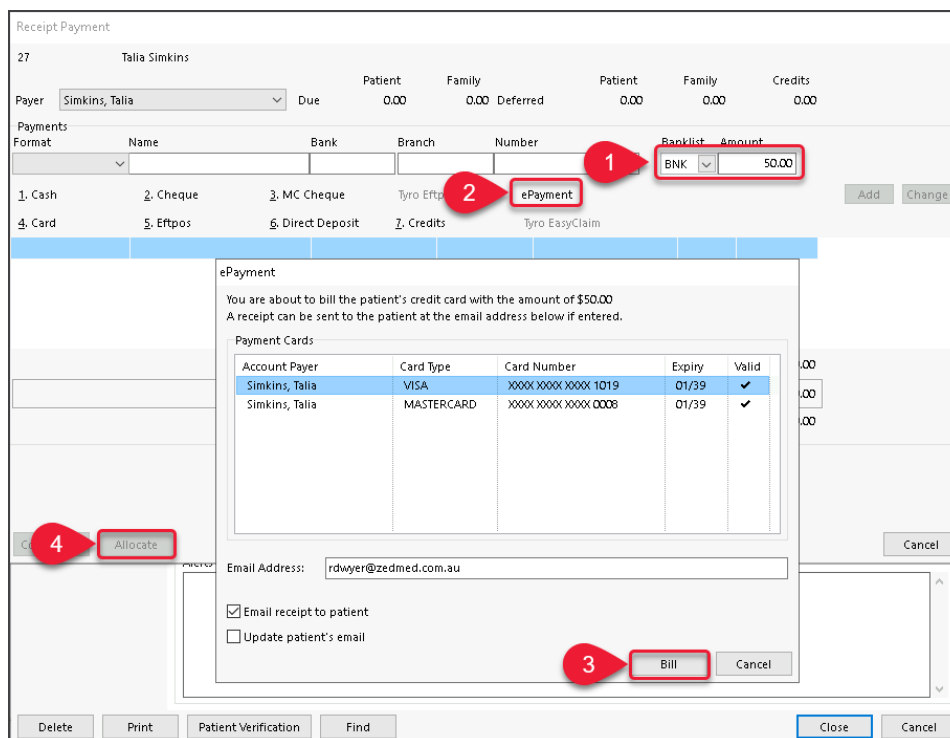
The **ePayment** screen will open.

Check the correct card is selected

6. Select **Bill**.

A confirmation dialogue will appear.

7. Select **Allocate**.



The screenshot shows the 'Receipt Payment' interface for patient Talia Simkins. The 'Payments' section includes a table with columns for Name, Bank, Branch, Number, Banklist, and Amount. The 'ePayment' option is selected. Below this, an 'ePayment' dialog box is open, displaying a table of 'Payment Cards' with columns for Account Payer, Card Type, Card Number, Expiry, and Valid. The 'Bill' button is highlighted with a red callout '3'. At the bottom of the dialog, the 'Allocate' button is highlighted with a red callout '4'. Other callouts include '1' pointing to the 'ePayment' selection and '2' pointing to a card in the table.

Account Payer	Card Type	Card Number	Expiry	Valid
Simkins, Talia	VISA	XXXX XXXX XXXX 1019	01/39	✓
Simkins, Talia	MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

8. Select **Cancel** on the **Allocation** screen.
9. Select **No** to 'Do you want to allocate the credit?'

10. Select **No** to 'Do you want to print a receipt?'

The patient's **Acct Enquiry** will show the total credits available to the patient.

Account Enquiry window showing patient details for Simkins, Talia. The 'Account Payer Credits' field is highlighted with a red box and shows a value of 50.00. The window also displays a table of account balances for various currency codes (Curr) and a transaction table.

Step 2- Apply the credit when billing

This will bill the patient by applying the deposit credit, then charging the remaining balance via ePayment.

1. Select **Credits** then select **Add**.

The recorded deposit will be added as a credit, reducing the **Amount Due** and the **Balance due**.

Quick Pay window for Mr Happy Jones. The 'Credits' option is highlighted with a red box. The 'ePayment' option is also highlighted with a red box. The summary table at the bottom right shows the following values: Payment Total (40.00), Amount Due (71.30), and Balance (31.30). The 'Credits' field in the table above shows a value of 40.00.

2. **Important:** Check that the correct Banklist is selected. It will show the one linked to the treating doctor.

3. Select **ePayment**.

The **ePayment** screen will show the credit card to be used, and the email address the receipt will be sent to.

4. Select **Bill**.

A confirmation message will appear.

Quick Pay

22 Mr Happy Jones

	Patient	Family	Patient	Family	Credits
Payer	Jones, Happy				0.00
Current Invoice(s)					0.00
Payments					
Format					
1. Cash					
4. Card					
Credits					

ePayment

You are about to bill the patient's credit card with the amount of \$31.30
A receipt can be sent to the patient at the email address below if entered.

Account Payer	Card Type	Card Number	Expiry	Valid
Jones, Happy	VISA	XXXX XXXX XXXX 1019	01/39	✓
Jones, Happy	MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

Email Address: zedmedtesting+hJones@gmail.com

Email receipt to patient
 Update patient's email

Bill Cancel

Eclipse MA Online Suppress Combo Inv. Send to Patient Print Cancel