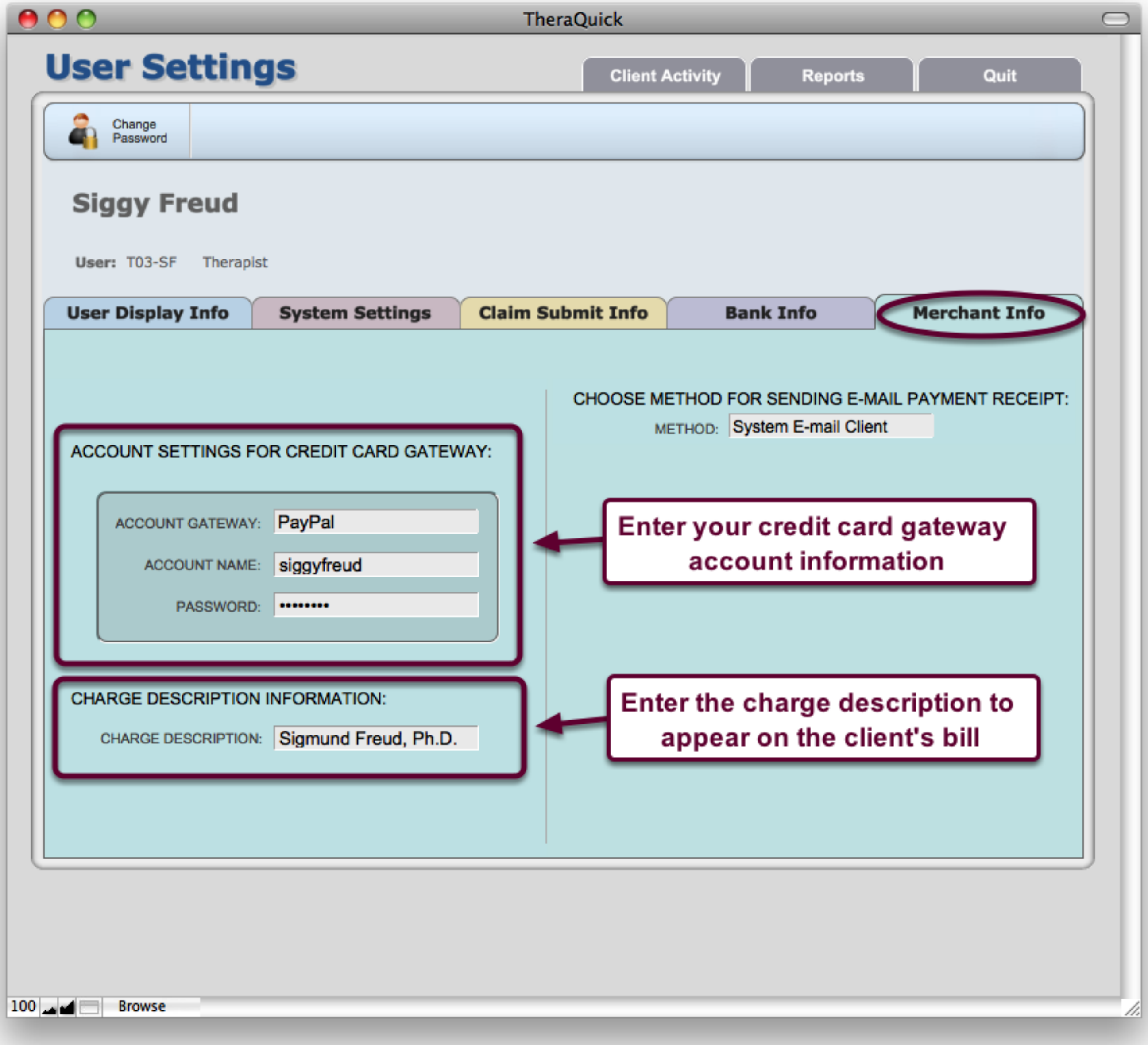
Using Credit Cards for Client Payments

How to setup and use client credit cards for payments.

Navigate to your User Setup > Merchant Info tab and enter your credit card gateway account information and the description for the charge (that will appear on the client's credit card bill).



Siggy Freud

User: T03-SF Therapist

CHOOSE METHOD FOR SENDING E-MAIL PAYMENT RECEIPT:
METHOD: System E-mail Client

ACCOUNT SETTINGS FOR CREDIT CARD GATEWAY:
ACCOUNT GATEWAY: PayPal
ACCOUNT NAME: siggyfreud
PASSWORD: ••••••••

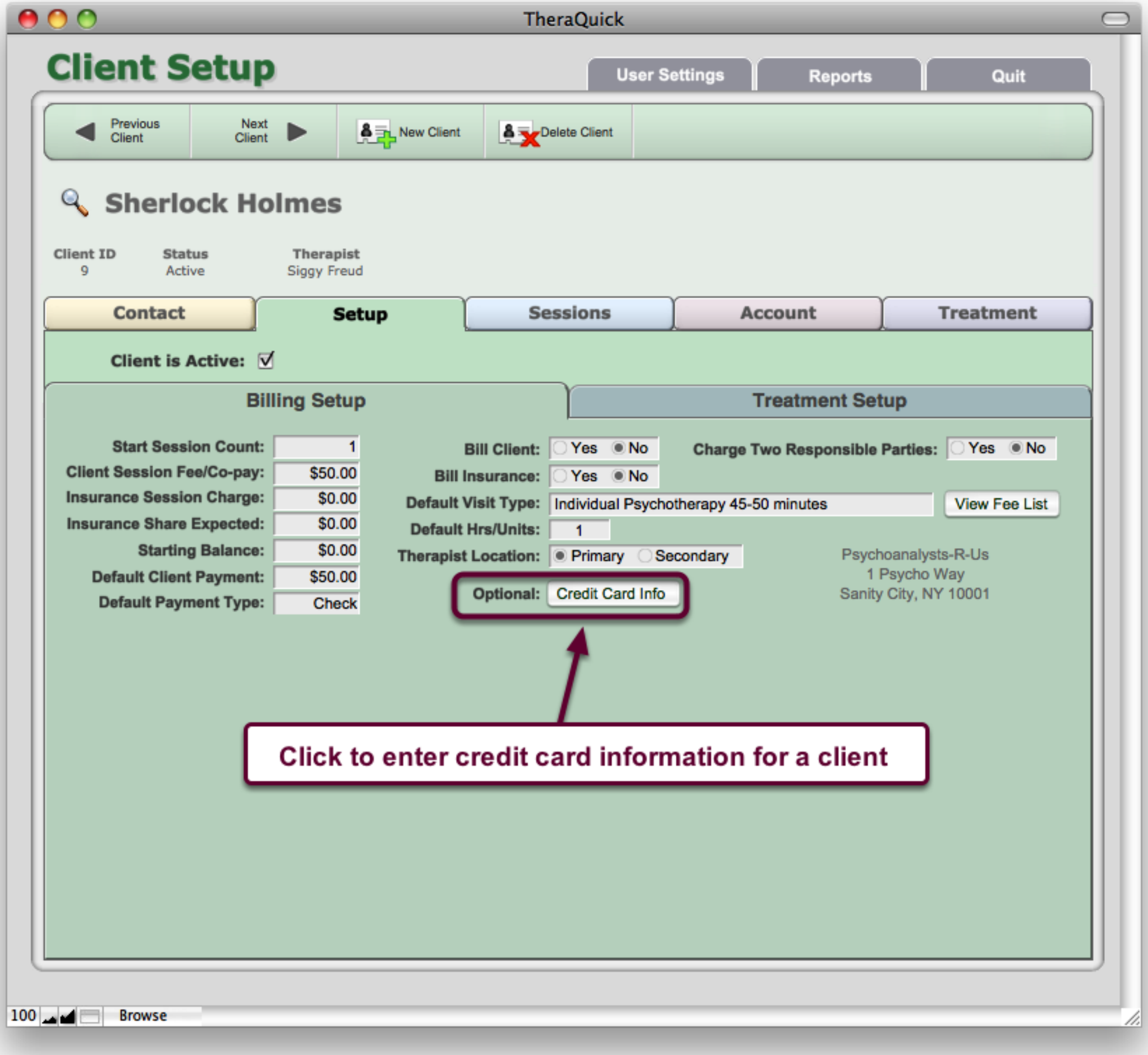
CHARGE DESCRIPTION INFORMATION:
CHARGE DESCRIPTION: Sigmund Freud, Ph.D.

Enter your credit card gateway account information

Enter the charge description to appear on the client's bill

You must have a PayPal Payflow account or an Authorize.net account to use as the internet gateway and they must already be connected to your credit card merchant account. If you don't already have a merchant account, we recommend the PayPal Payflow Pro account that combines both a merchant account and a gateway into one account for simplicity. Once you have your account set up, enter your account access information on your User Setup > Merchant Info tab. Enter the optional email information if you wish to send payment receipts to your clients.

Navigate to the client's Setup layout and click on "Credit Card Info" to enter the client's credit card information.



Sherlock Holmes

Client ID 9
Status Active
Therapist Siggy Freud

Client is Active: ☑

Start Session Count: 1
Client Session Fee/Co-pay: $50.00
Insurance Session Charge: $0.00
Insurance Share Expected: $0.00
Starting Balance: $0.00
Default Client Payment: $50.00
Default Payment Type: Check

Bill Client: ○ Yes ● No
Bill Insurance: ○ Yes ● No
Default Visit Type: Individual Psychotherapy 45-50 minutes
Default Hrs/Units: 1
Therapist Location: ● Primary ○ Secondary
Optional: Credit Card Info

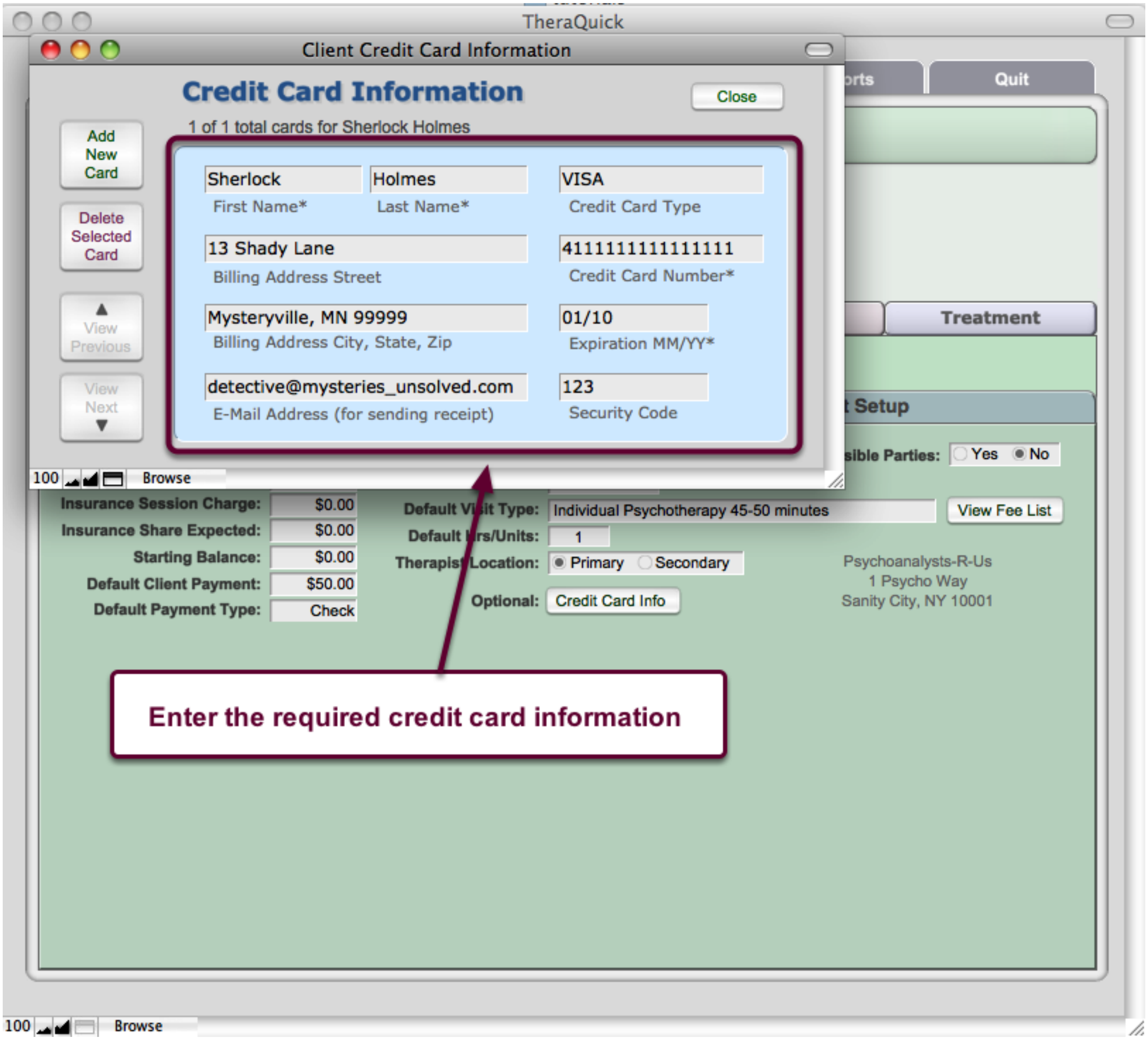
Charge Two Responsible Parties: ○ Yes ● No

Psychoanalysts-R-Us
1 Psycho Way
Sanity City, NY 10001

Click to enter credit card information for a client

Click on "Credit Card Info" to open the pop-up window for entering the client credit card information. Select "Card" as the Default Payment Type if you wish to have "card" entered as the default when you charge a client session (this can be changed on the fly if necessary).

Enter the client's credit card information in the pop-up window.



1 of 1 total cards for Sherlock Holmes

First Name*: Sherlock
Last Name*: Holmes
Credit Card Type: VISA
Billing Address Street: 13 Shady Lane
Credit Card Number*: 4111111111111111
Billing Address City, State, Zip: Mysteryville, MN 99999
Expiration MM/YY*: 01/10
E-Mail Address (for sending receipt): detective@mysteries_unsolved.com
Security Code: 123

Insurance Session Charge: $0.00
Insurance Share Expected: $0.00
Starting Balance: $0.00
Default Client Payment: $50.00
Default Payment Type: Check
Default Visit Type: Individual Psychotherapy 45-50 minutes
Default Hrs/Units: 1
Therapist Location: ● Primary ○ Secondary
Optional: Credit Card Info
Responsible Parties: ○ Yes ● No

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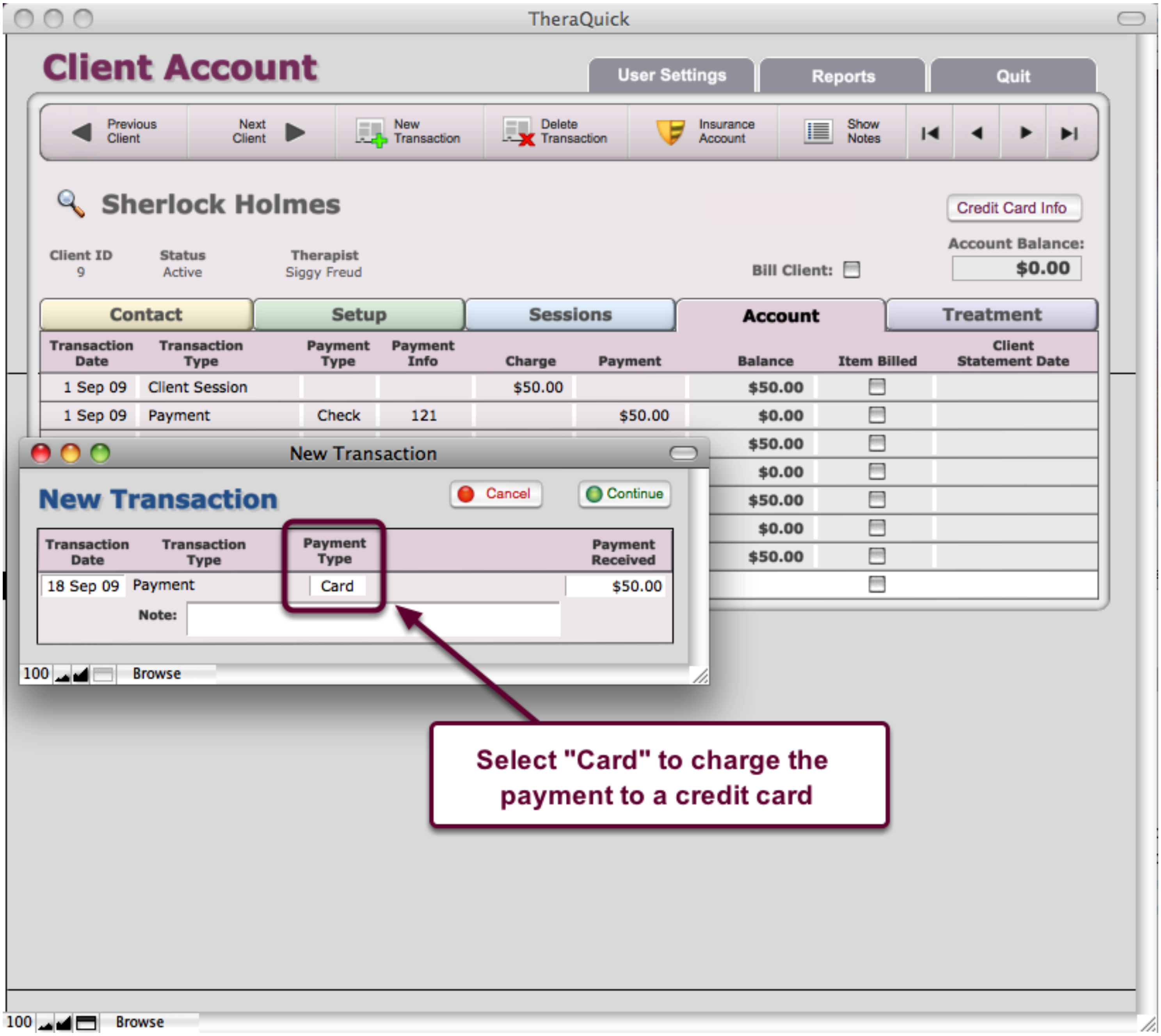
1 Psycho Way
Sanity City, NY 10001

Enter the required credit card information

Enter the required information (fields with the asterisk). The credit card number must be entered without spaces and the expiration date must use the two-digit MM/YY format. You can store additional credit cards for this client using the "Add New Card" button and the "View Next" and "View Previous" buttons to bring the different cards into view. The card in view will be used for the current charge.

When you charge a session or create a new payment transaction for the client, select "Card" as the Payment Type.



Sherlock Holmes

Client ID: 9
Status: Active
Therapist: Siggy Freud
Bill Client: ☐
Account Balance: $0.00

Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
1 Sep 09	Client Session			$50.00		$50.00	☐	
1 Sep 09	Payment	Check	121		$50.00	$0.00	☐	
						$50.00	☐	
						$0.00	☐	
						$50.00	☐	
						$0.00	☐	
						$50.00	☐	
							☐	

New Transaction

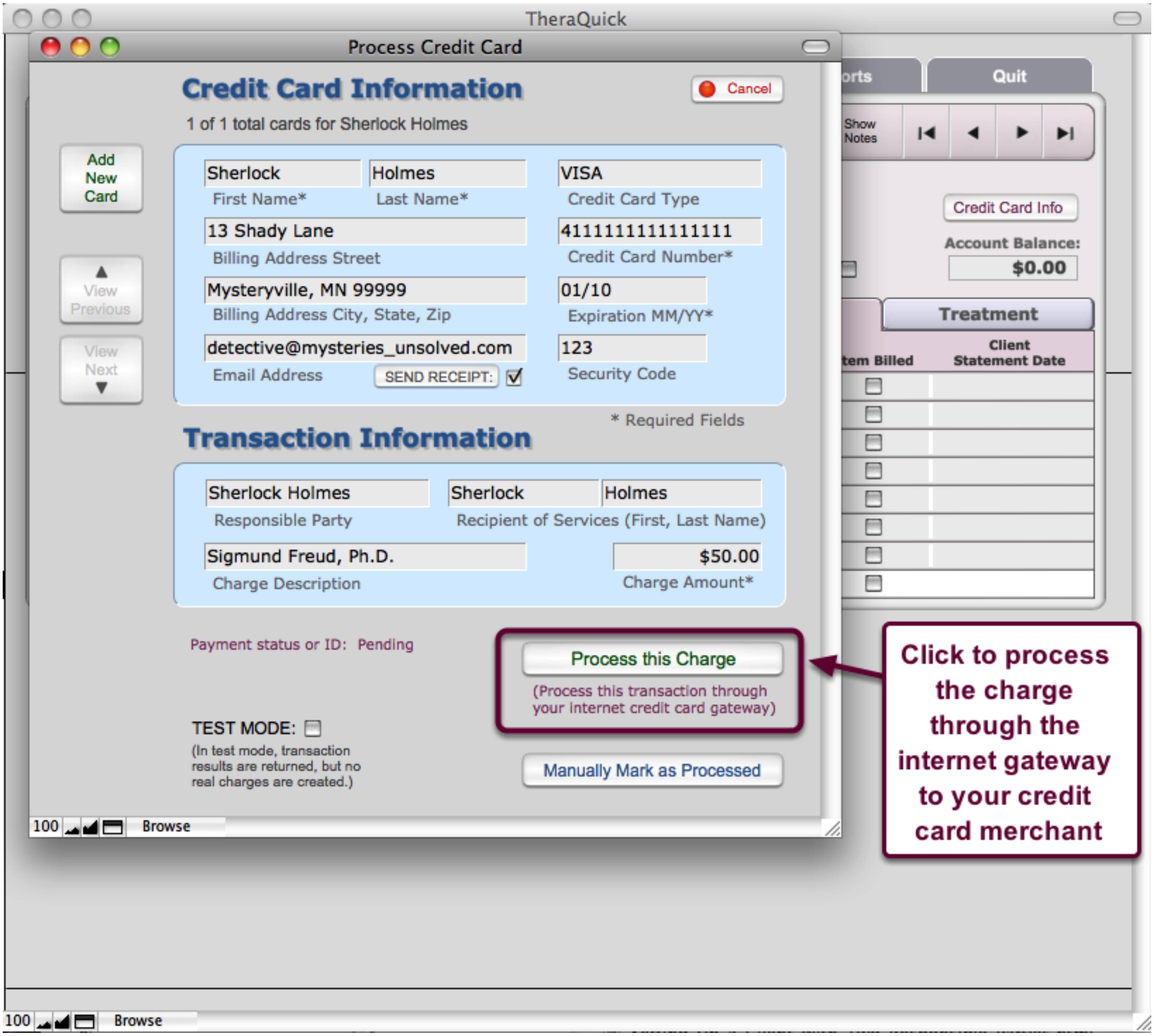
Transaction Date	Transaction Type	Payment Type	Payment Received
18 Sep 09	Payment	Card	$50.00

Note:

Select "Card" to charge the payment to a credit card

In the New Transaction pop-up window, select "Card" for the Payment Type, enter the amount to be charged under Payment Received and click "Continue."

Confirm the information in the Process Credit Card pop-up window.



Credit Card Information

1 of 1 total cards for Sherlock Holmes

First Name*: Sherlock
Last Name*: Holmes
Credit Card Type: VISA
Billing Address Street: 13 Shady Lane
Credit Card Number*: 4111111111111111
Billing Address City, State, Zip: Mysteryville, MN 99999
Expiration MM/YY*: 01/10
Email Address: detective@mysteries_unsolved.com
Security Code: 123

* Required Fields

Transaction Information

Responsible Party: Sherlock Holmes
Recipient of Services (First, Last Name): Sherlock Holmes
Charge Description: Sigmund Freud, Ph.D.
Charge Amount*: $50.00

Payment status or ID: Pending

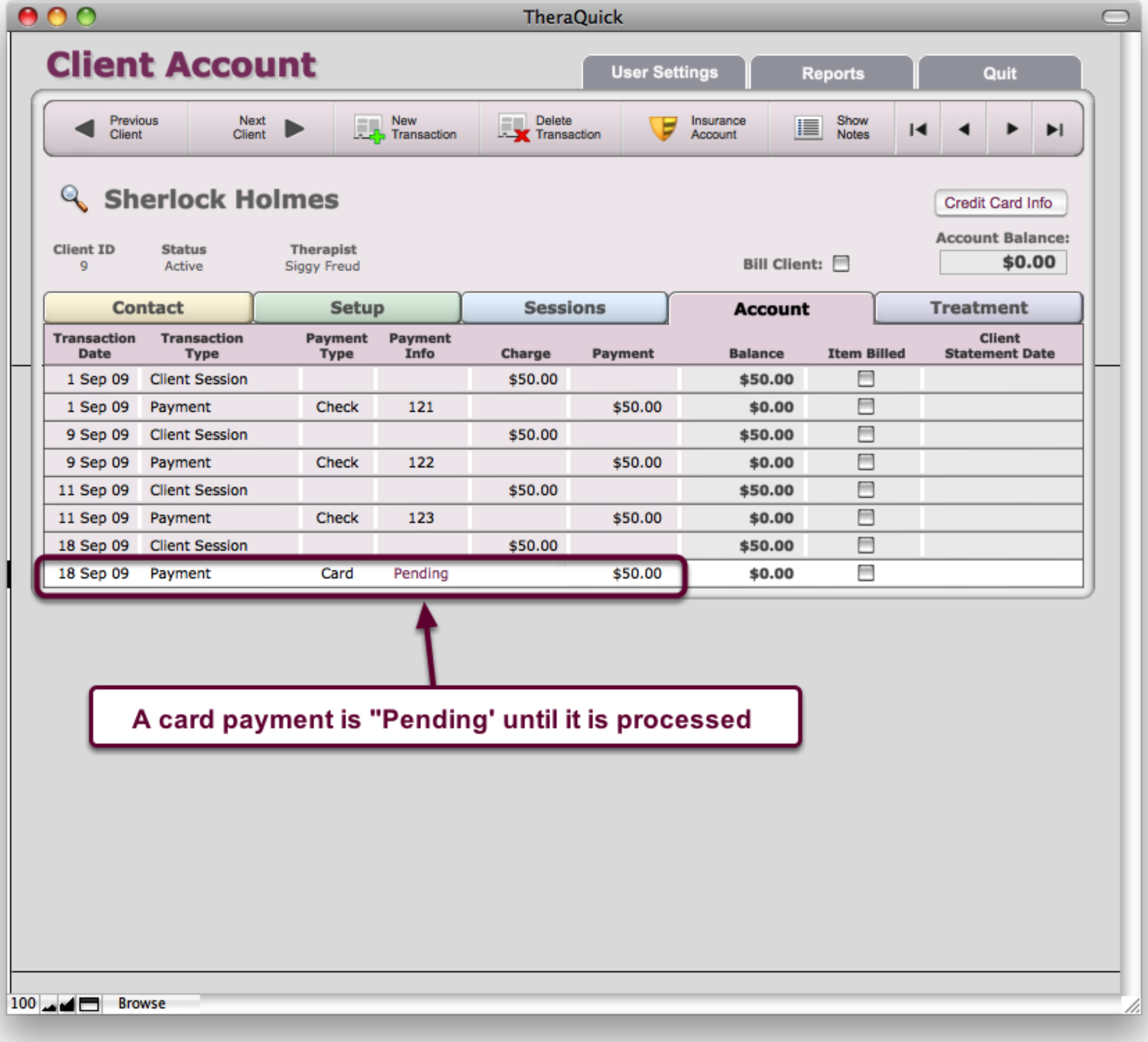
TEST MODE: ☐
(In test mode, transaction results are returned, but no real charges are created.)

Account Balance: $0.00

Click to process the charge through the internet gateway to your credit card merchant

Confirm all the information in the Process Credit Card pop-up window, then click "Process this Charge." If you have used a different method or account for processing the credit card, click on "Manually Mark as Processed" to reflect that a charge was processed outside of TheraQuick. Note that an internet connection is required for processing the charge through your internet gateway. If you check "TEST MODE," the charge will be simulated and you will receive confirmation, but no actual charge will be billed to the credit card.

After entering the payment as a new transaction and before the charge is completed, it will be displayed as "Pending" in the client's account.



Sherlock Holmes

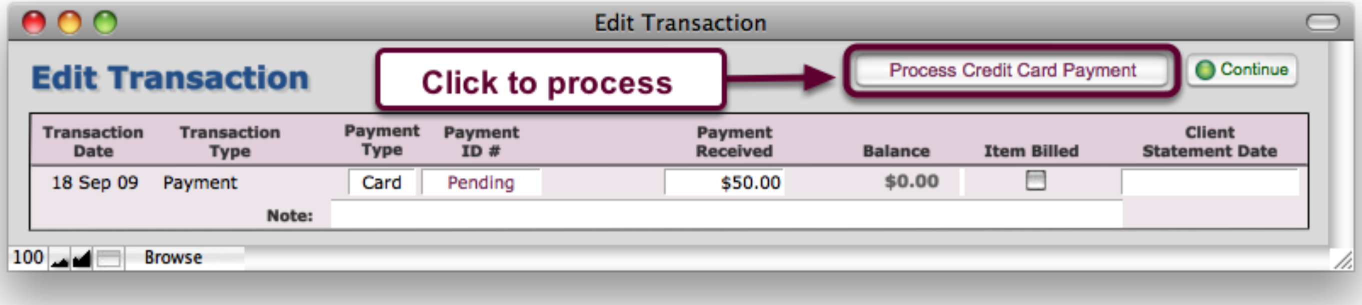
Client ID: 9
Status: Active
Therapist: Siggy Freud
Bill Client: ☐
Account Balance: $0.00

Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
1 Sep 09	Client Session			$50.00		$50.00	☐	
1 Sep 09	Payment	Check	121		$50.00	$0.00	☐	
9 Sep 09	Client Session			$50.00		$50.00	☐	
9 Sep 09	Payment	Check	122		$50.00	$0.00	☐	
11 Sep 09	Client Session			$50.00		$50.00	☐	
11 Sep 09	Payment	Check	123		$50.00	$0.00	☐	
18 Sep 09	Client Session			$50.00		$50.00	☐	
18 Sep 09	Payment	Card	Pending		$50.00	$0.00	☐	

A card payment is "Pending' until it is processed

After the new charge transaction has been created, it remains "Pending" until the charge is successfully processed (through TheraQuick or manually marked as charged). If you have canceled the processing, or if it was unsuccessful, it will remain in this state until you process it successfully.

To process a charge marked as "Pending," click on the transaction in the Accounts tab to edit it, then click on "Process Credit Card Payment."

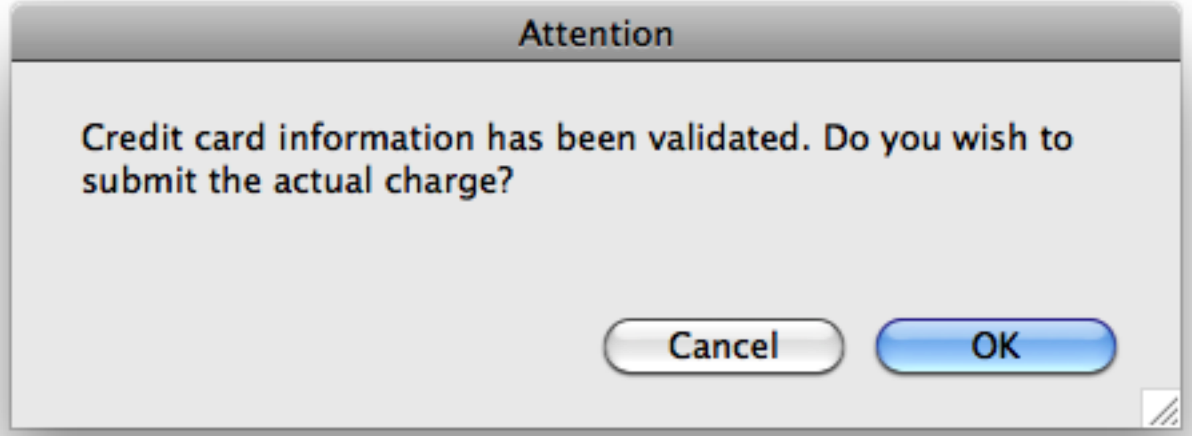


Transaction Date	Transaction Type	Payment Type	Payment ID #	Payment Received	Balance	Item Billed	Client Statement Date
18 Sep 09	Payment	Card	Pending	$50.00	$0.00	☐	

Note:

If a charge transaction is marked "Pending" you can attempt to process the charge again by clicking on the transaction to open the Edit Transaction pop-up window, then click on "Process Credit Card Payment" to resume processing the charge.

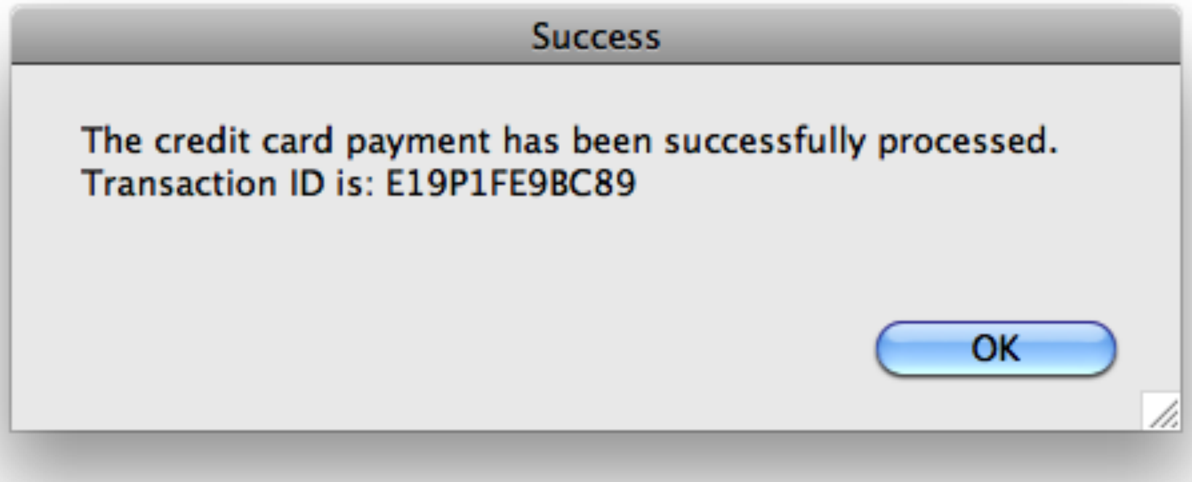
After clicking on "Process Charge" in the Process Credit Card pop-up window, the credit card information will be validated.



Credit card information has been validated. Do you wish to submit the actual charge?

If the credit card information is valid, you will have the option to continue with processing the charge. If the credit card information is not formatted correctly or has errors, you will see a message describing the error. Click "OK" to continue if the information has been validated.

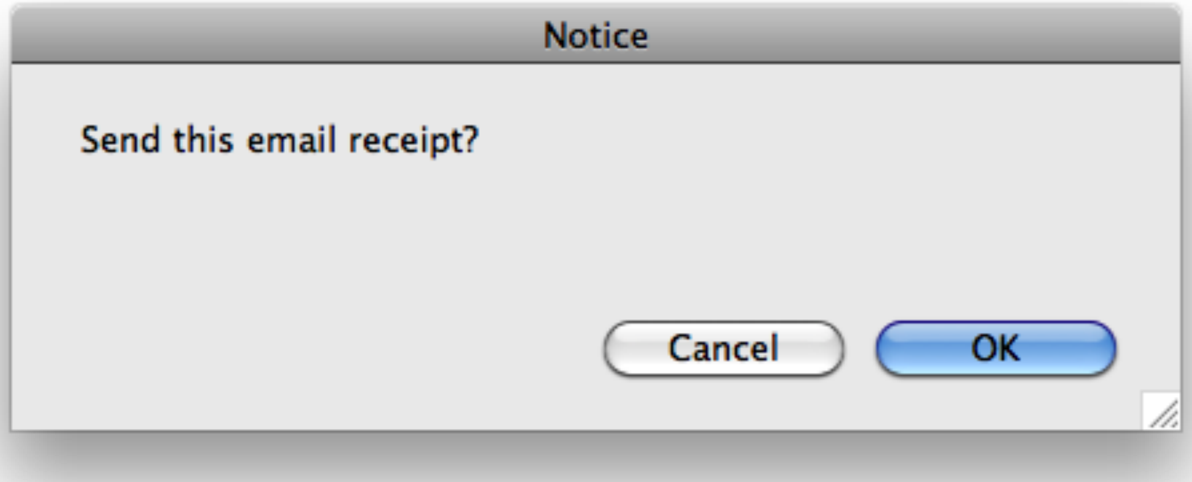
The charge will be processed and you will receive a Transaction ID in confirmation.



The credit card payment has been successfully processed.
Transaction ID is: E19P1FE9BC89

The Transaction ID is returned by your credit card merchant. This identifies this payment in your merchant account.

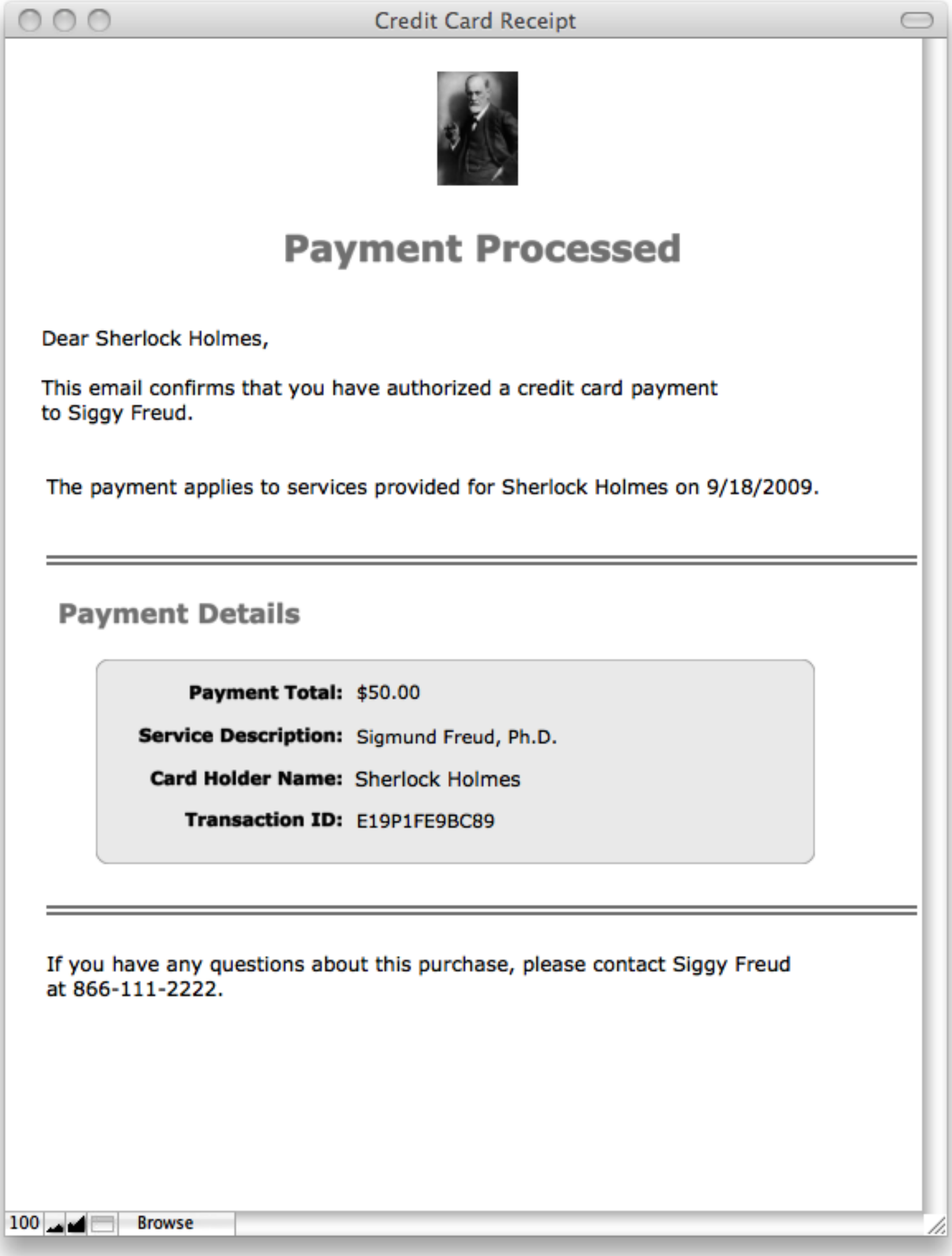
If you selected the option to send an email receipt to the client, the receipt will be displayed and you will be asked to confirm sending it.



Send this email receipt?

This notice will be displayed over the preview of the credit card receipt.

You will see a preview the credit card receipt.



Payment Processed

Dear Sherlock Holmes,

This email confirms that you have authorized a credit card payment to Siggy Freud.

The payment applies to services provided for Sherlock Holmes on 9/18/2009.

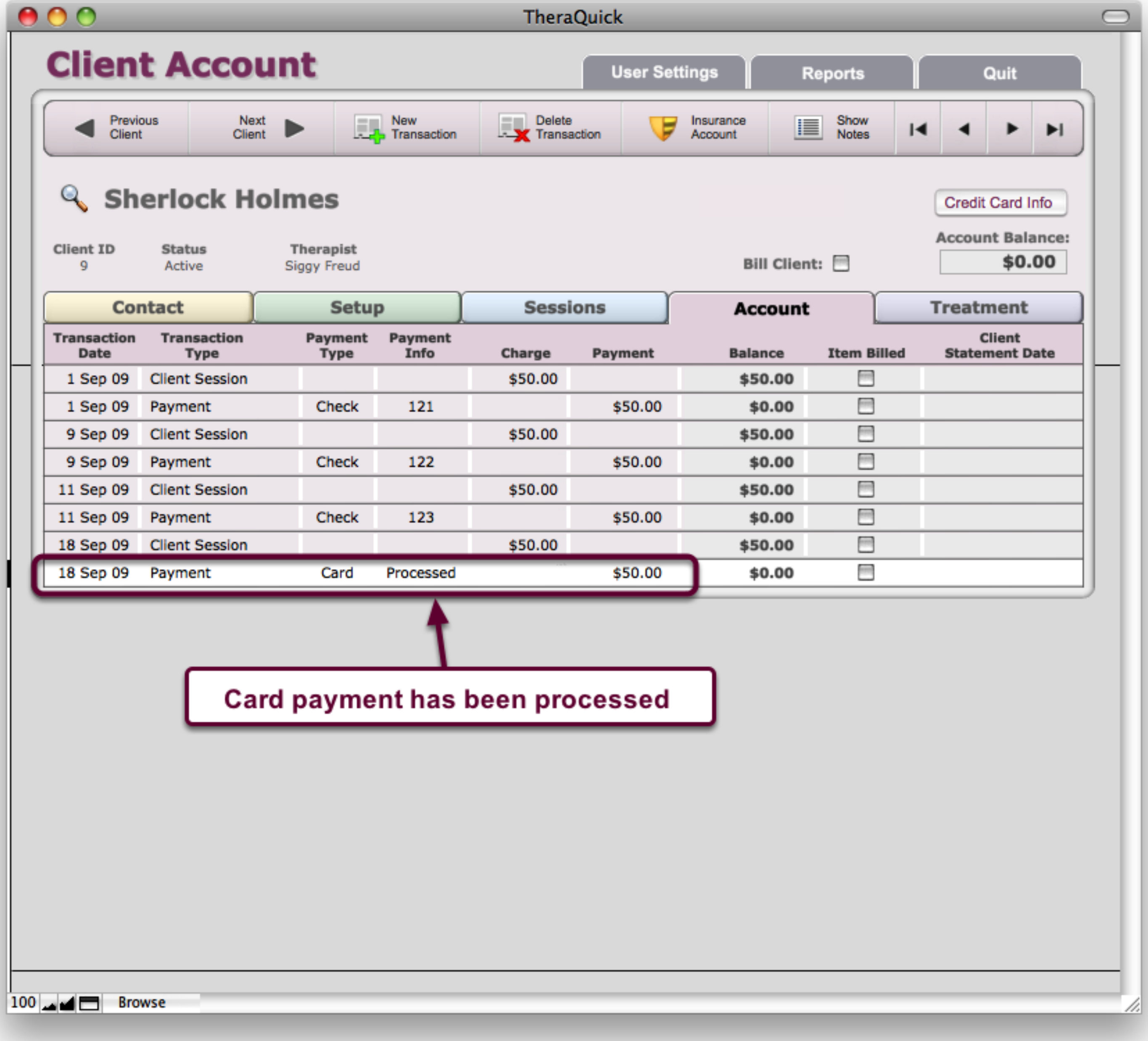
Payment Details

Payment Total:	$50.00
Service Description:	Sigmund Freud, Ph.D.
Card Holder Name:	Sherlock Holmes
Transaction ID:	E19P1FE9BC89

If you have any questions about this purchase, please contact Siggy Freud at 866-111-2222.

The credit card receipt is shown as it will appear in a PDF attachment sent to the client's email address.

The credit card payment will show as "Processed" in the client's account.



Sherlock Holmes

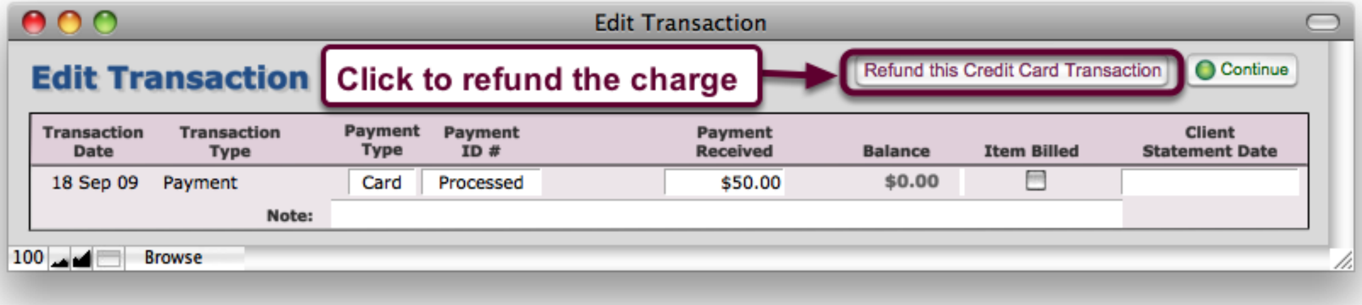
Client ID: 9
Status: Active
Therapist: Siggy Freud
Bill Client: ☐
Account Balance: $0.00

Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
1 Sep 09	Client Session			$50.00		$50.00	☐	
1 Sep 09	Payment	Check	121		$50.00	$0.00	☐	
9 Sep 09	Client Session			$50.00		$50.00	☐	
9 Sep 09	Payment	Check	122		$50.00	$0.00	☐	
11 Sep 09	Client Session			$50.00		$50.00	☐	
11 Sep 09	Payment	Check	123		$50.00	$0.00	☐	
18 Sep 09	Client Session			$50.00		$50.00	☐	
18 Sep 09	Payment	Card	Processed		$50.00	$0.00	☐	

Card payment has been processed

If a credit card payment is successfully processed (or manually marked as processed), it will be displayed as "Processed" in the client's account.

If you ever wish to refund the credit card charge, click on the transaction to open the Edit Transaction pop-up window.



Edit Transaction

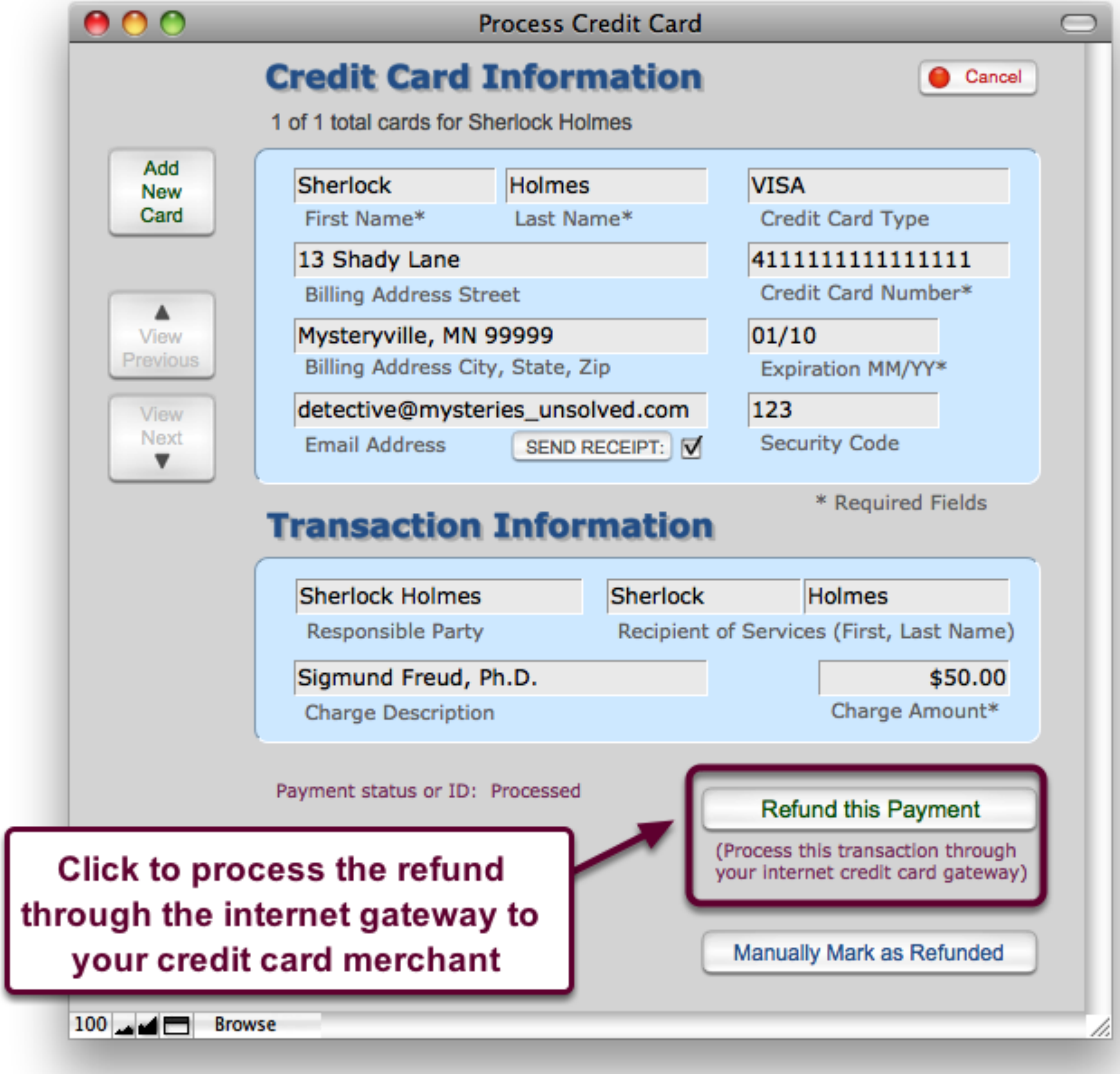
Click to refund the charge

Transaction Date	Transaction Type	Payment Type	Payment ID #	Payment Received	Balance	Item Billed	Client Statement Date
18 Sep 09	Payment	Card	Processed	$50.00	$0.00	☐	

Note:

In the Edit Transaction pop-up window for a credit card charge, the "Refund this Credit Card Transaction" button will appear to give you the option of refunding the charge. Click on that button to open the Process Credit Card pop-up window.

If you need to refund the transaction, click on "Refund this Payment" in the Process Credit Card pop-up window.



Process Credit Card

Credit Card Information

1 of 1 total cards for Sherlock Holmes

Sherlock
First Name*

Holmes
Last Name*

VISA
Credit Card Type

13 Shady Lane
Billing Address Street

4111111111111111
Credit Card Number*

Mysteryville, MN 99999
Billing Address City, State, Zip

01/10
Expiration MM/YY*

detective@mysteries_unsolved.com
Email Address

SEND RECEIPT: ☑

123
Security Code

* Required Fields

Transaction Information

Sherlock Holmes
Responsible Party

Sherlock Holmes
Recipient of Services (First, Last Name)

Sigmund Freud, Ph.D.
Charge Description

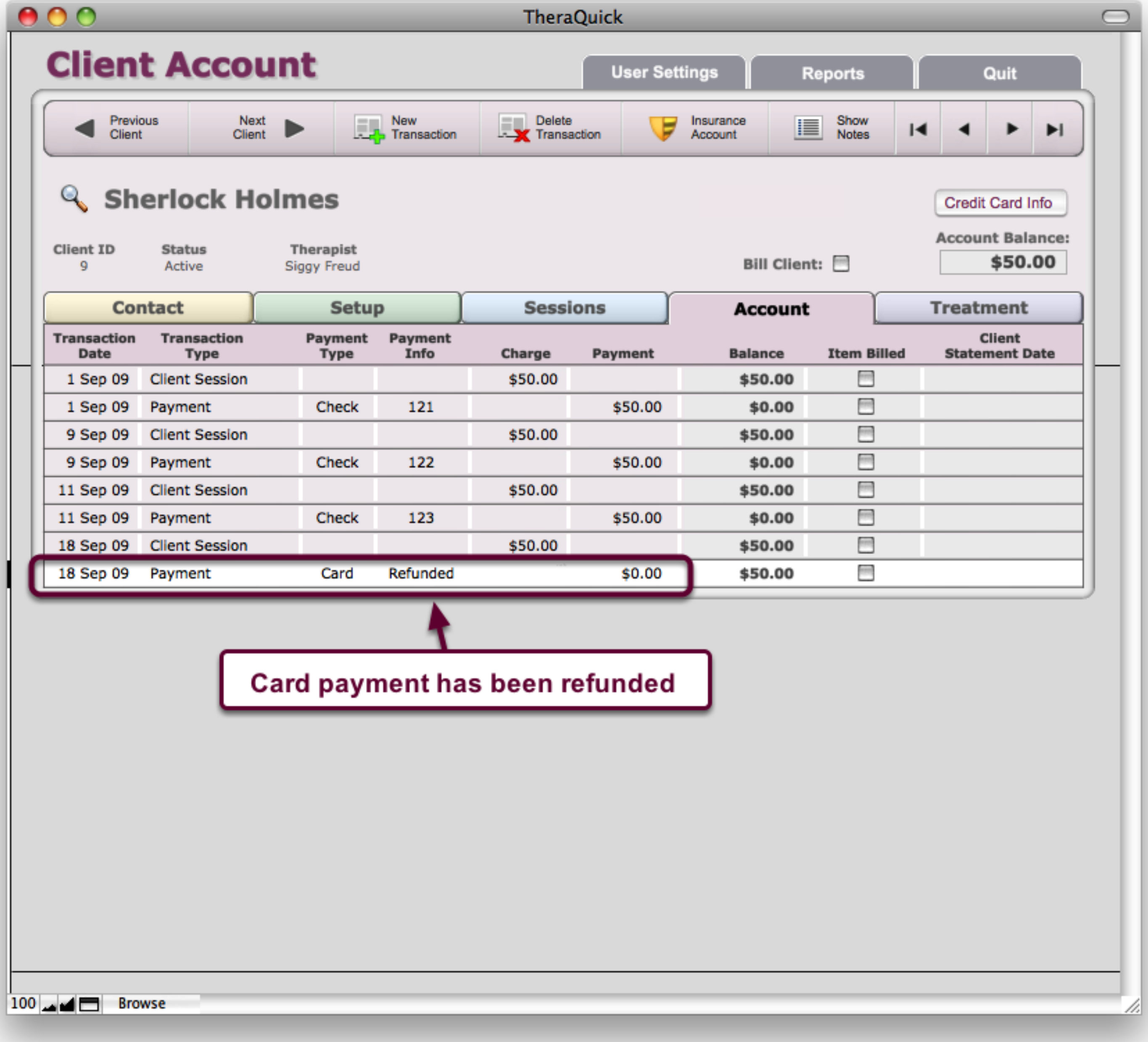
$50.00
Charge Amount*

Payment status or ID: Processed

Click to process the refund through the internet gateway to your credit card merchant

Confirm the credit card information and Charge Amount (to be refunded), and click on "Refund this Payment" to perform a refund through your credit card merchant (or click on "Manually Mark as Refunded" if you performed the refund outside of TheraQuick).

The Payment amount will be set to zero, and the charge transaction will be marked as "Refunded."



Sherlock Holmes

Client ID 9

Status Active

Therapist Siggy Freud

Bill Client: ☐

Account Balance: $50.00

Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
1 Sep 09	Client Session			$50.00		$50.00	☐	
1 Sep 09	Payment	Check	121		$50.00	$0.00	☐	
9 Sep 09	Client Session			$50.00		$50.00	☐	
9 Sep 09	Payment	Check	122		$50.00	$0.00	☐	
11 Sep 09	Client Session			$50.00		$50.00	☐	
11 Sep 09	Payment	Check	123		$50.00	$0.00	☐	
18 Sep 09	Client Session			$50.00		$50.00	☐	
18 Sep 09	Payment	Card	Refunded		$0.00	$50.00	☐	

Card payment has been refunded

The transaction will still be listed in the client account as a "Refunded" card payment, with the payment amount of $0.