

# How to request a credit card

Version: 1.00 | Last Modified on 19/12/2025 9:46 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 type, last 4 digits and expiry date. The credit card can be used for payment until it expires.

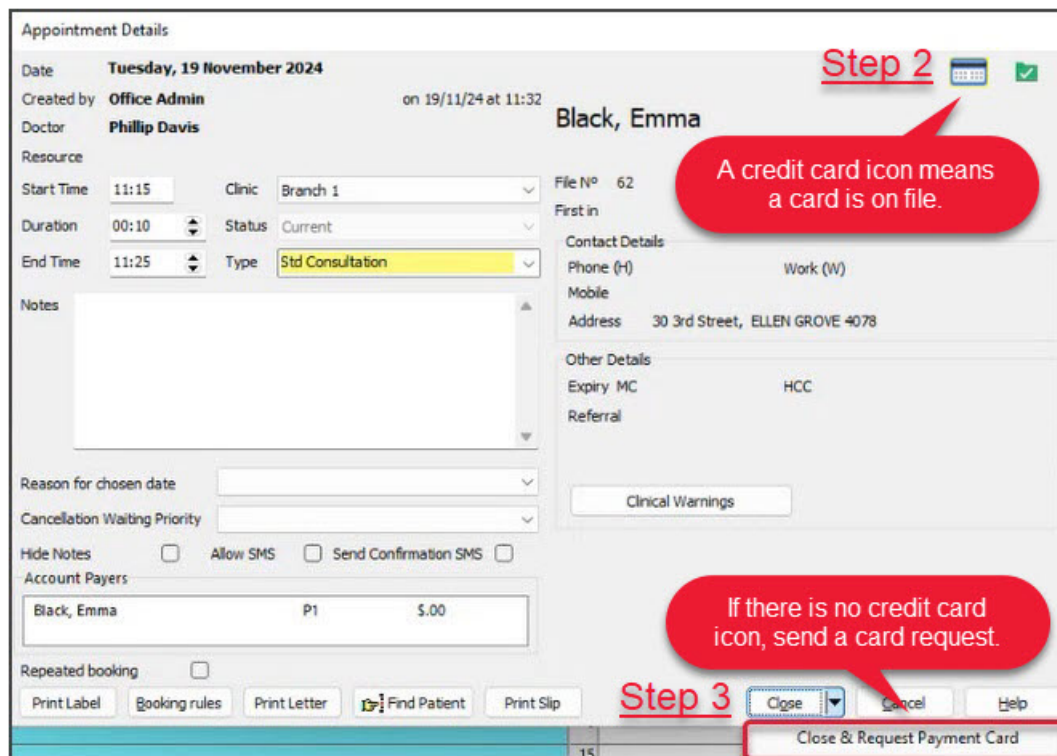
## How to request credit card information

**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**

File No: 62

First in

Contact Details

Phone (H): Work (W)

Mobile

Address: 30 3rd Street, ELLEN GROVE 4078

Other Details

Expiry: MC HCC

Referral

Clinical Warnings

Reason for chosen date

Cancellation Waiting Priority

Hide Notes ☐ Allow SMS ☐ Send Confirmation SMS ☐

Account Payers

Black, Emma P1 \$0.00

Repeated booking ☐

Print Label Booking rules Print Letter Find Patient Print Slip

**Step 2** A credit card icon means a card is on file.

**Step 3** If there is no credit card icon, send a card request.

Close & Request Payment Card

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

