

# Request a card and bill QSG

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This quickstart guide show how to use Payment Gateway to request credit card information from a patient when booking an appointment and how to bill that card. For additional information, see the full [Payment Gateway User Guide](#).

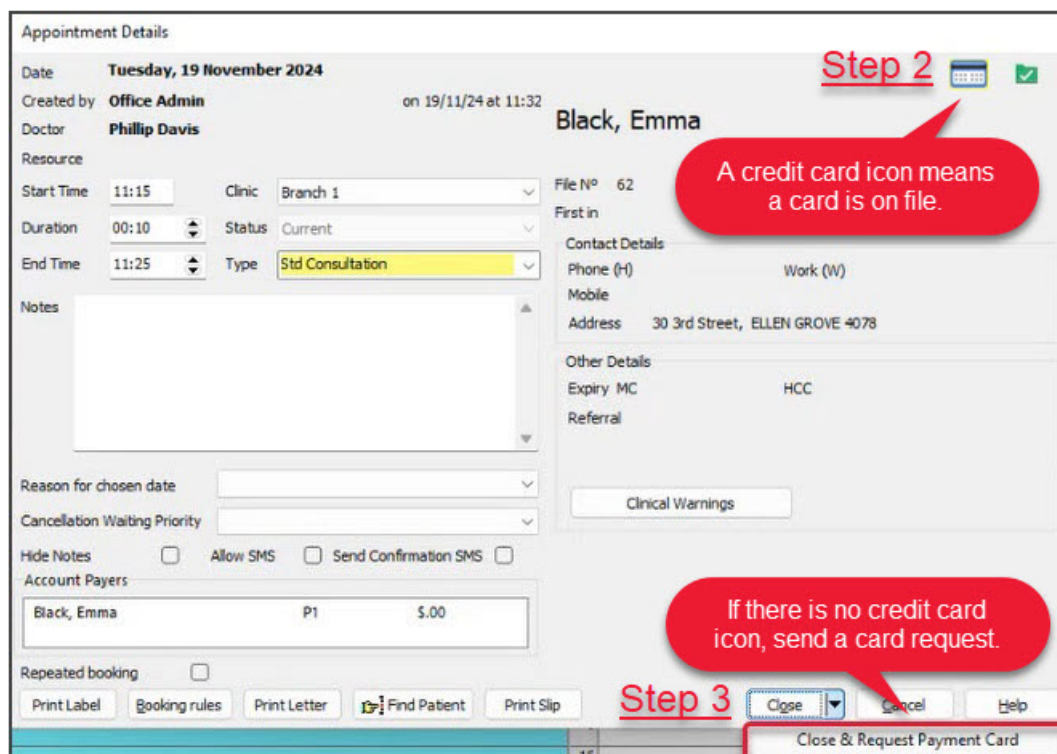
## How to request credit card information

**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.

**Note**, you can also right-click and existing booking in the Appointment Grid and select **Request Payment Card**.



**Appointment Details**

Date: **Tuesday, 19 November 2024**

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

Doctor: **Phillip Davis**

Resource: **Black, Emma**

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 \$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

## How to bill using ePayment

1. Follow the private patient billing process.
2. Check the patient is the payer and the correct treating doctor is selected.
3. Select **QuickPay**.

4. Select **ePayment**.
5. Select the card to use. If there are multiple cards, the selected card will be highlighted in grey.
6. Select **Bill**.

**New Invoice**

Invoice

Quick Pay

62 Emma Black

Payer: Black, Emma Due: 0.00 Patient: 0.00 Family: 0.00 Deferred: 0.00 Patient: 0.00 Family: 0.00 Credits: 0.00

Current Invoice(s)

Allocate ☒ Value 71.30 ☐ Discounted value 71.30 ☐ Gap 35.00

Payments

Format	Name	Bank	Branch	Detail	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque	Tyro Eftpos	ePayment	PD	
4. Card	5. Eftpos	6. Direct Deposit	7. Credits	Tyro Eas		

**ePayment**

You are about to bill the patient's credit card with the amount of 571.30  
A receipt can be sent to the patient at the email address below if entered.

Payment Cards

Account Payer	Card Type	Card Number	Expiry	Valid
Black, Emma	MASTERCARD	XXXX XXXX XXXX 0008	01/39	✓

Email Address: zedmedtesting+eblack@gmail.com

☒ Email receipt to patient  
☐ Update patient's email

**Bill** Cancel

Defer Family Easyclaim ECLIPSE MA Online Bulk Bill Combo Inv. Print Send to Patient Suppress Quick Pay Cancel Help

The ePayment dialog will close and a confirmation message will appear on the Quickpay screen.

**Payments**

Format	Name	Bank	Branch	Number	Banklist	Amount
1. Cash	2. Cheque	3. MC Cheque			PD	
4. Card	5. Eftpos	6. Direct Deposit				
ePayment					PD	95.00

**Information**

Payment successful  
Receipt successfully sent to:  
jsmith@zedmed.com.au

**OK**

Add Change