

Request a card and bill QSG

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This quickstart guide shows 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.

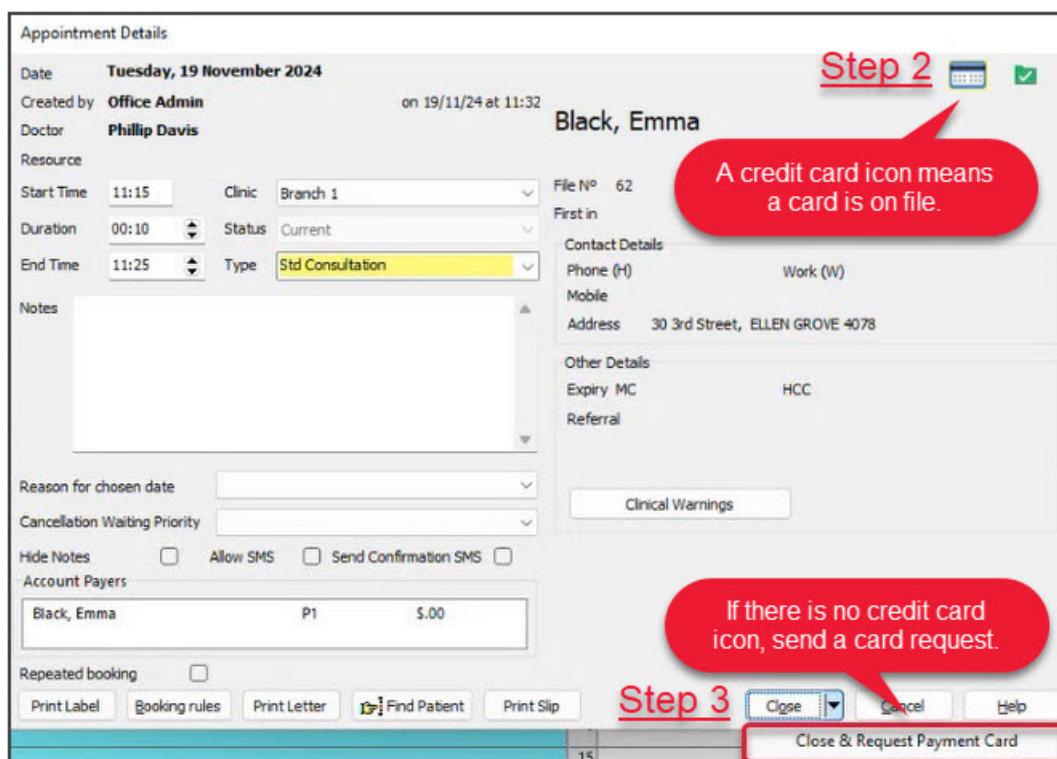
Step 2 - In the **Appointment Details** screen, check if there is a credit card icon.

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 an 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:

Start Time: **11:15** Clinic: **Branch 1**

Duration: **00:10** Status: **Current**

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
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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.

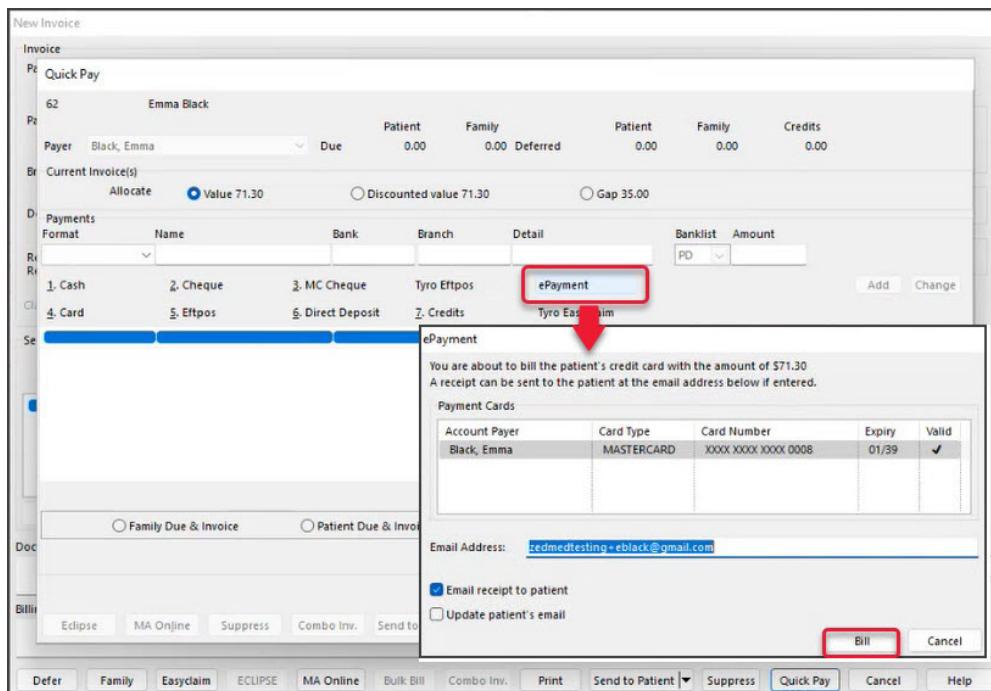
How to bill using ePayment

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.



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

