PayConnect Installation

Overview

The Datacon Dental System integrates with PayConnect Merchant Services provided by DentalXChange to handle credit card approval and payment processing. When credit card payments are posted to the account ledger, you may enter the credit card information or use a magnetic card reader attached to your workstation. The software contacts the PayConnect servers to get approval and posts the payment when the card is approved. The software also handles credit card refunds and will void a payment or refund entered in error.

PayConnect supports VISA, MasterCard, American Express, Discover, and Diner's Club cards.

Prerequisites

To use PayConnect Merchant Services your software must be running on a Mac server with EmManager Version 2.1 dated 5/27/2015 or later. Your Dental Software must be Version 3.6F dated 5/28/2015 or later. pcLink for Windows should be Version 1.9 dated 5/23/2015 or later and pcLink for Mac should be Version 1.8 dated 5/21/2015 or later. Contact Datacon if you are unsure of your software versions.

You will also need to contact PayConnect to get a Username and Password for each doctor in the practice that will receive payments.

www.DentalXChange.com
Contact DentalXChange Sales at 800-576-6412 Ext. 455 to sign up.
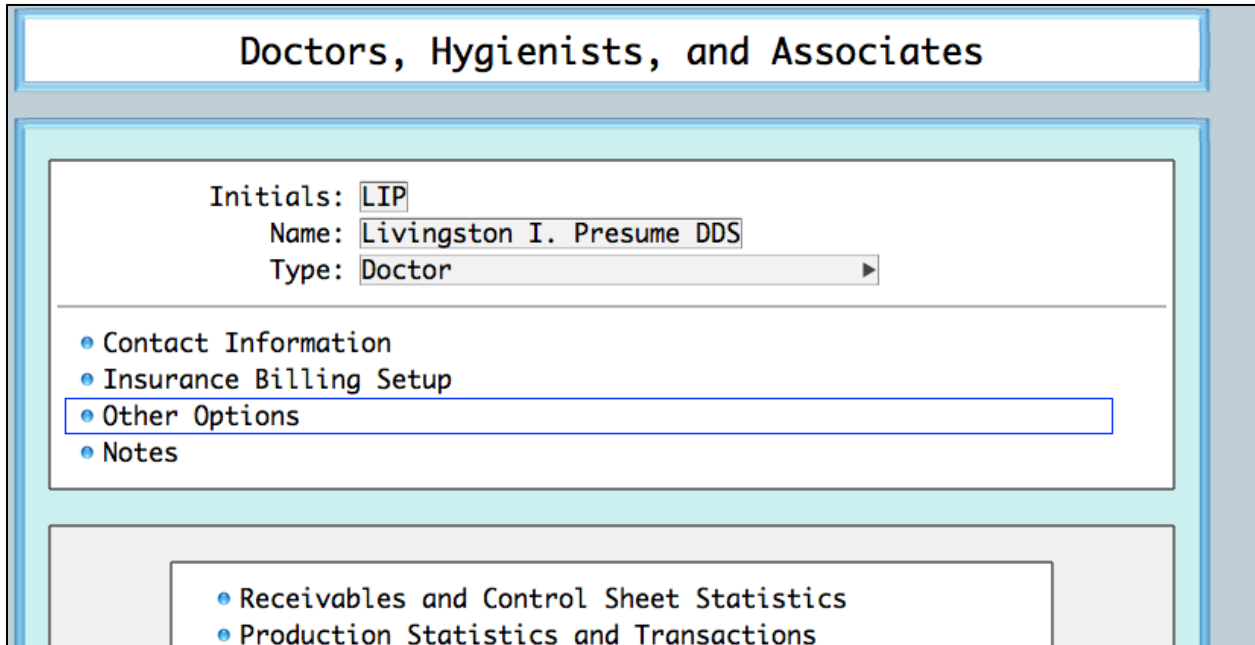
Setup

There are three steps to PayConnect setup.
1. Enable PayConnect Integration
2. Setup PayConnect for each Doctor
3. Verify that the payment and refund procedures are categorized correctly

The first step is to enable the PayConnect integration for the database. To do this you must have the privilege to change Miscellaneous Options. Miscellaneous Options can be found by searching on the Main Menu or by selecting "System Stuff" from the Main Menu. Once in Miscellaneous Options you may search for PayConnection or scroll down to the "Integration Options" section. Click the checkbox to enable PayConnect Integration.
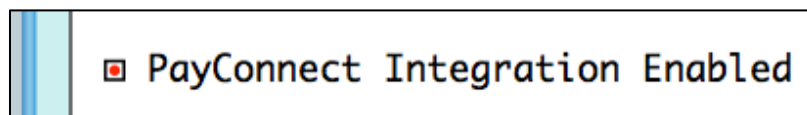
After enabling PayConnect for the practice, you must then set it up for each Doctor. Each Doctor in the list of Providers can have a separate account with PayConnect. Entering the Username and Password provided by PayConnect enables the integration for each doctor. The menu selection for the list of Providers is in the lower left portion of the Main Menu. Choose the doctor from the list of Providers.
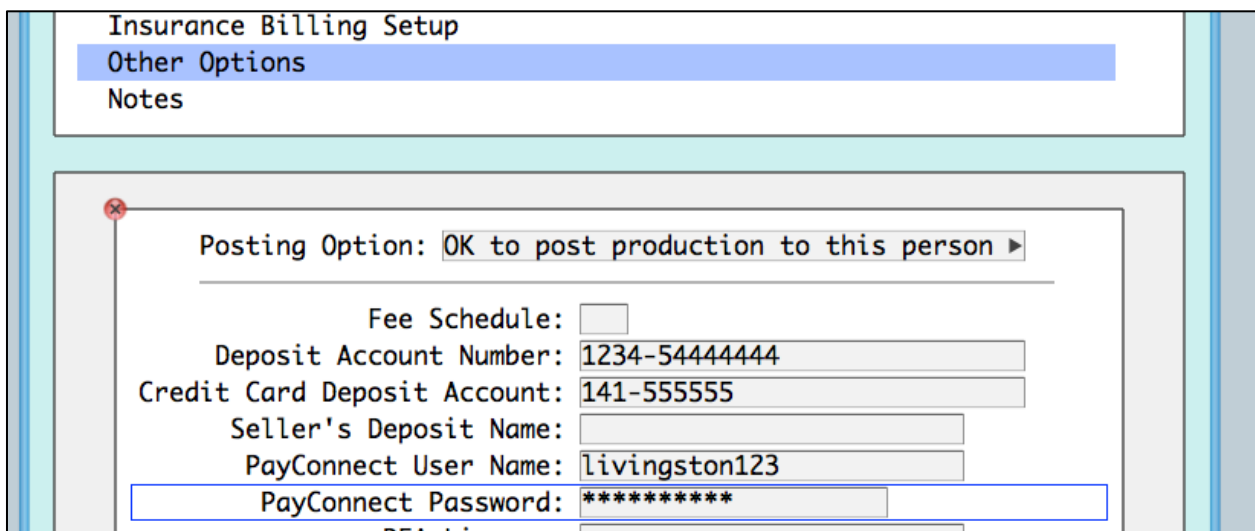

The Username and Password are entered in Other Options.
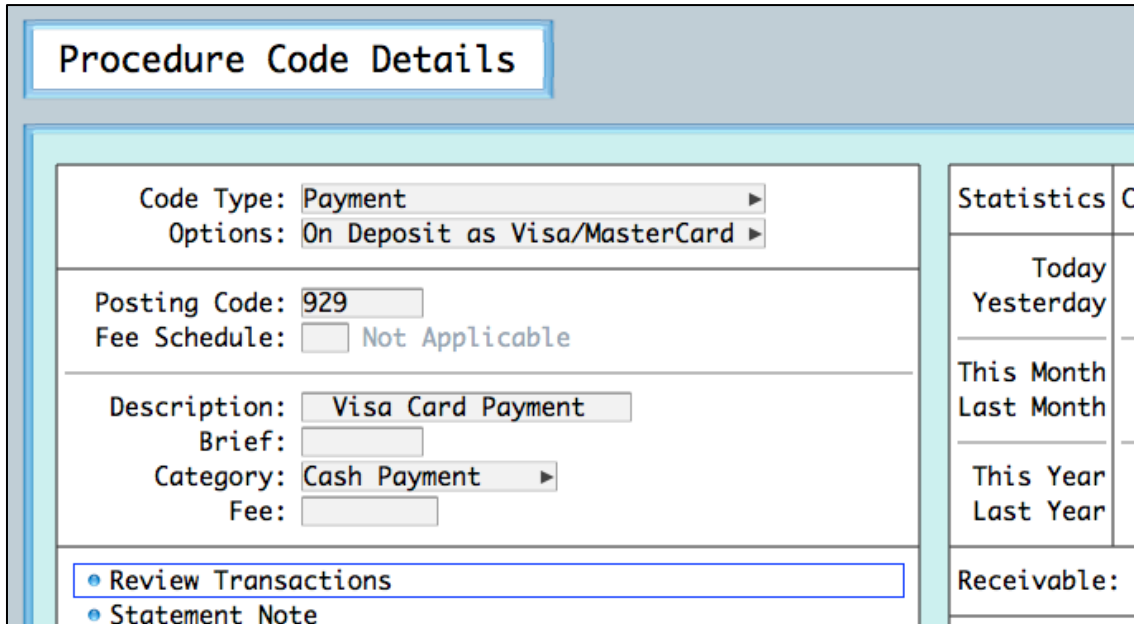
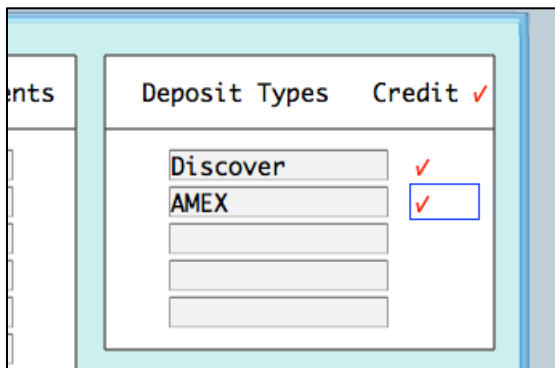Once the Doctor has the Username and Password entered, the Payment screen for accounts under the doctor will be expanded to include the fields for credit card information when a credit card procedure is posted.

Payment procedures in the Datacon software include a Deposit Type option. To see this you must select "Procedure Codes" in the lower left corner of the Main Menu, select "Review Accounting Codes", and select a payment code from the list.

There are three built-in deposit options: Cash, Check, and VISA/MasterCard. When a payment or payment reversal is "On Deposit as VISA/MasterCard" this enables the additional data entry fields on the Payment Screen.

In addition to the three built-in deposit types, there are five user defined deposit types. If one of these deposit types is connected to payments that should be processed through PayConnect, it must be designated as a credit card payment. This is done on the Payment Categories screen. To see this you must select "Procedure Codes" in the lower left corner of the Main Menu and select "Procedure Categories" from the menu. User defined Deposit Types are in the box at the upper right corner of this screen.

To have payments or refunds for these deposit types handled by PayConnect, mark the deposit type with a check by clicking to the right of the description.
This enables the additional data entry fields on the Payment Screen.

Questions? Contact the staff at Datacon for help.
www.datacondental.com
Phone: (800) 773-7878
Email: info@datacondental.com