Using PayConnect

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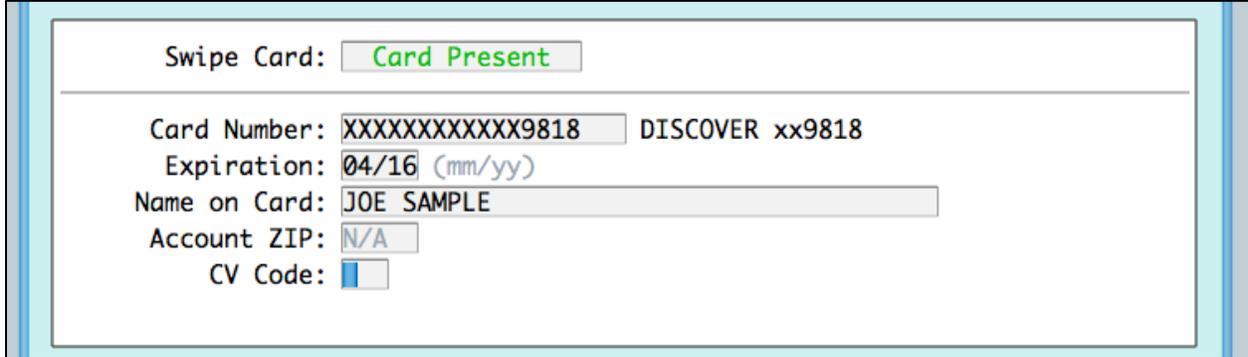
PayConnect supports VISA, MasterCard, American Express, Discover, and Diner's Club cards.

See the document titled "PayConnect Integration Setup" for instructions for installing PayConnect.

Posting Payments

When PayConnect integration is enabled for both the practice and the doctor owning the account, posting a credit card payment procedure will present additional data entry fields.
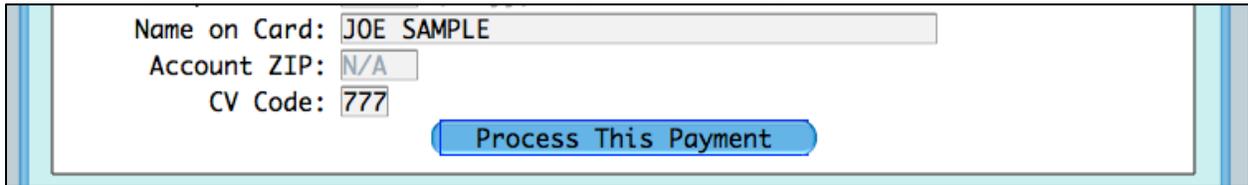
After entering the amount and optionally choosing a patient and date of service, the cursor arrives at a item titled "Swipe Card". This field has an animated arrow moving across it as a visual cue. If you have a magnetic card reader attached to your workstation, swiping the card will fill in all of the relevant fields below and leave the cursor positioned at the CV Code field where you can enter the card verification code from the back of the card.
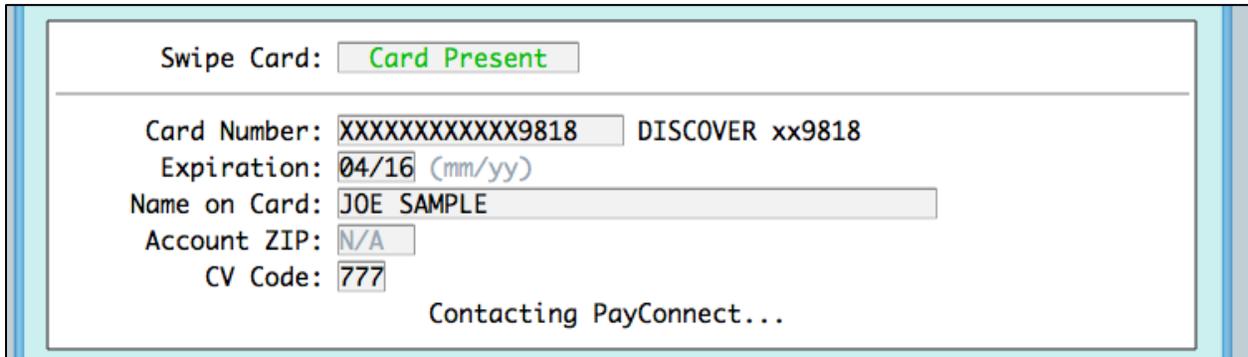

After entering the CV Code, the "Process This Payment" button appears.

When the button is clicked or selected the information is sent to PayConnect.

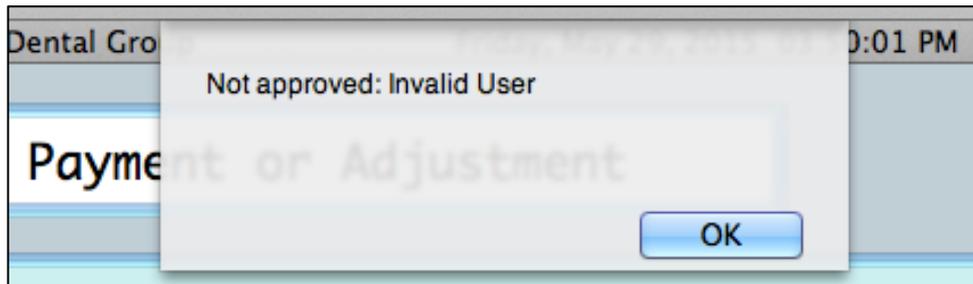If the transaction is not approved, a message is displayed – in this case the Doctor's PayConnect Username or Password is incorrect.

When the transaction is approved, the payment is posted to the account ledger.

If you do not have a magnetic card reader or you are taking a payment over phone you can skip past the "Swipe Card" prompt and manually enter the card number and other information.
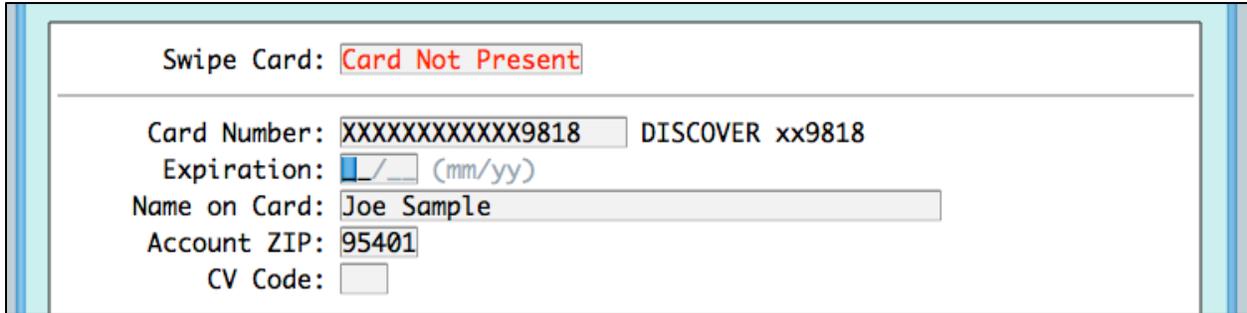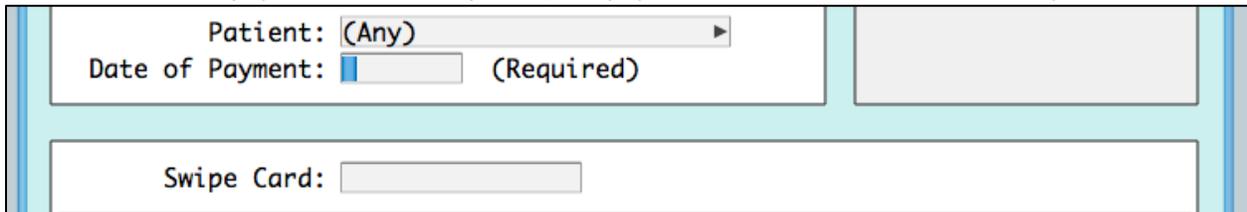
Swipe Card: Card Not Present

Card Number: XXXXXXXXXXXX9818   DISCOVER xx9818
Expiration: __/__ (mm/yy)
Name on Card: Joe Sample
Account ZIP: 95401
CV Code:

When a card number is manually entered or any information from the card is modified, the "Swipe Card" field displays "Card Not Present" in red. When a card number is manually entered, the software automatically fills in the fields for Name on Card and Account ZIP based on information on the account. You may edit these fields to match the information on the patient's credit card. After entering the CV code the "Process This Payment" button appears and clicking it will authorize the transaction and post the payment if authorized.

Posting Refunds

When a credit card payment reversal is posted, the payment screen is formatted differently.
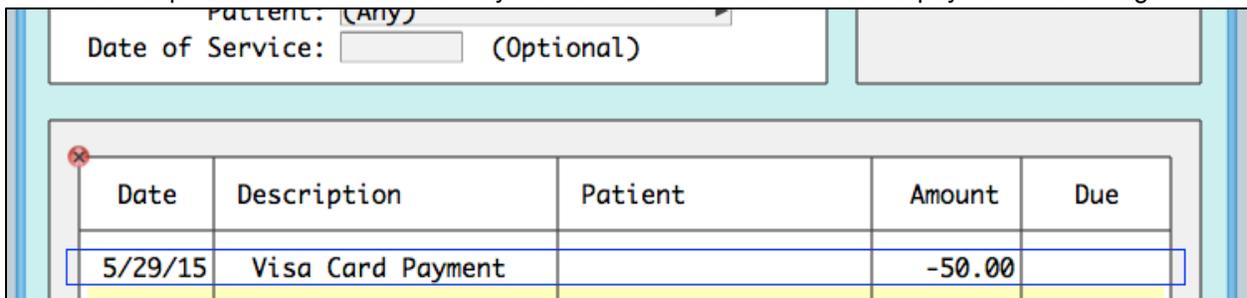
Patient: (Any)
Date of Payment: | (Required)

Swipe Card:

A field is presented where you must enter the date of the credit card payment to be refunded. Credit card payments are represented by a token that replaces the actual credit card number and a reference number that identifies the individual transaction. Entering the date of service allows your software to access this information to process the refund. You may hit the search or button to find the payment in the ledger.

Patient: (Any)
Date of Service: [   ] (Optional)

Date	Description	Patient	Amount	Due
5/29/15	Visa Card Payment		-50.00	

Selecting the payment transaction will fill in the Date of Payment field and other relevant fields on the payment screen. The button at the bottom says "Process this Refund". Selecting this will send a transaction to PayConnect requesting a return of funds. Refunds can only be processed after payments have been settled.

Deleting Credit Card Transactions

When you attempt to delete a ledger entry for a credit card payment or refund, the software will verify that you want to delete something that has been posted to PayConnect.

If you say "Yes" the software will attempt to VOID the transaction with PayConnect. If this is successful, the payment or refund will be deleted from the account ledger. Payments and refunds can only be voided prior to being settled. Generally this would be on the same day they were posted.

Questions?

PayConnect support is available at 800-576-6412 Ext. 452
Datacon software support is available at 800-773-7878
You may also send an email to info@datacondental.com