Online payment requests

Now you can easily send a payment request via email or text to a client with a link to a secure online payment portal. The payment will be applied against the client's oldest balance and will appear on Cornerstone* Software reports that display payment details. Keep tabs on all payment requests with the Online Payment Request Log. **Note:** U.S. practices only. Not compatible with xCharge payment software.

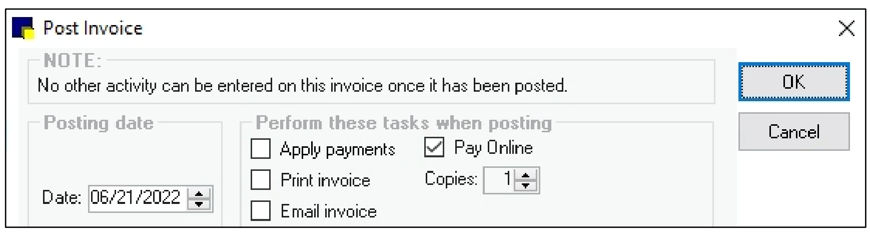
Prerequisites

- A live merchant account from a sanctioned Cornerstone integrated payment provider. The Online Payments feature must be activated. To activate for existing subscribers, visit software.idexx.com/cornerstone-online-payments. To learn more about integrated payments, visit software.idexx.com/cornerstone-integrated-payments.
- Cornerstone Software 9.3 or higher
- Security credentials appropriate for client account payments
- Client email address or phone number (can be entered when you send the request)

Sending a payment request

To start the payment request, open the Online Payment Request window any of these ways:

- In the Post Invoice window, select the **Pay Online** checkbox.
  Workflow tips:
  - (Cornerstone 9.3 only) Clear the **Apply payments** checkbox, unless you are posting both a payment and a request.
  - Clear the **Print invoice** and **Email invoice** checkboxes (an invoice will be included with the request).

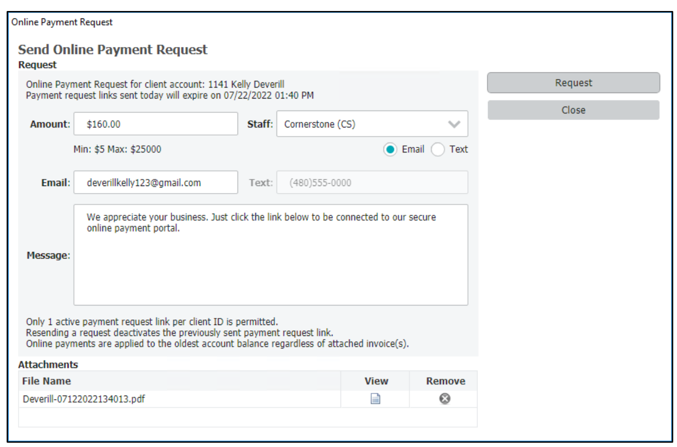


- In the Client Account window, click the **Pay Online** button.
- Right-click in the **Client Account Information** tab of the Patient Clipboard* and select **Pay Online** from the menu.

In the Online Payment Request window, enter or update the information as needed:

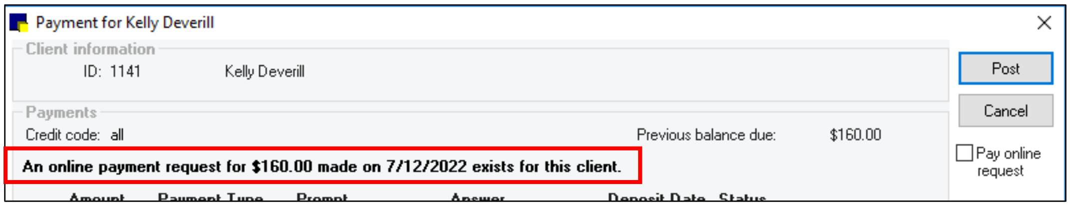
1. Verify or enter the payment amount. (The default value is either the current debit/invoice balance or the current payment request, if a request is already active.)

   Note: Zero, negative, or amounts outside the displayed minimum/maximum range are not allowed.
2. Specify who is sending the request in the **Staff** field.
3. Select **Email** or **Text**. You can use only one method per request.
4. Verify or update the email address or phone number. Only one address or number can be used per request.
5. Update any messaging, if needed (email requests only).
6. Review or remove the attached invoice, if needed. The invoice is attached automatically if you begin the payment request from the invoicing workflow. You cannot add other attachments. Based on the configured card vendor, text requests may include the attached invoice.
7. Click **Request**.

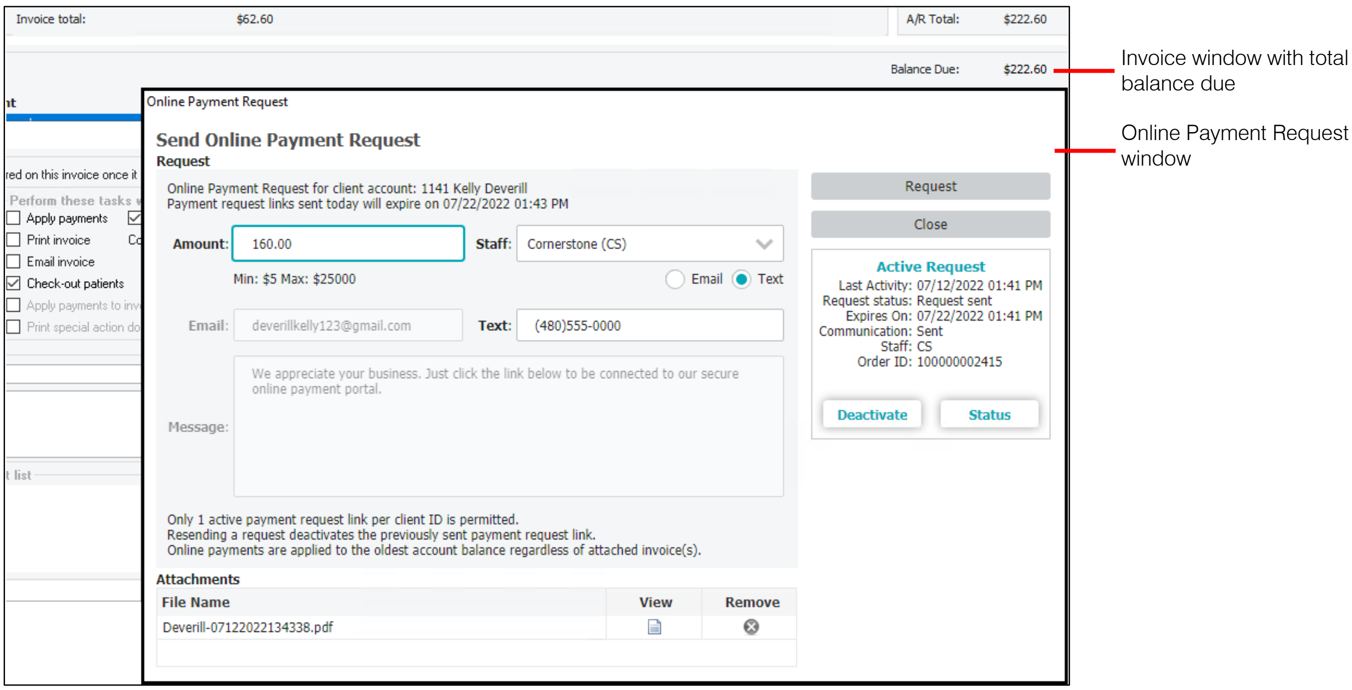


After the request is sent

- Your client receives an email or a text with a link to a secure payment portal.
- Cornerstone payment windows display an active request message. **Tip:** When posting a payment on account, you can click **Pay online request** in the Payment-for window. You must enter a payment to use this method.



- Sending an updated request (i.e., a new invoice) will display the current request amount by default, with the cursor in the amount field for you. **Tip:** The client's total balance due is seen from the invoice window in background.



- When paid, the payment is posted to the client's account as Online Card Payment. The amount is applied to the oldest balance first, and the request status is updated to **Paid Online** in the Online Payment Request Log.

  Note: For multi-location/single database (MLSD) practices, the received payment appears on the payment and deposit reports of the practice that sent the request.

07/12/2022	Invoice #: 16 - Closed
07/12/2022	Invoice #: 17 - Closed
07/12/2022	Payment: Online Card Payment, Card Number: XXXX4111

Reports related to payments

End of Day: Daily Deposit, Daily Payment Register reports, Itemized Audit Trail
End of Month: Monthly Deposit, GL Batch
Client: Client Account History

Other payment request actions

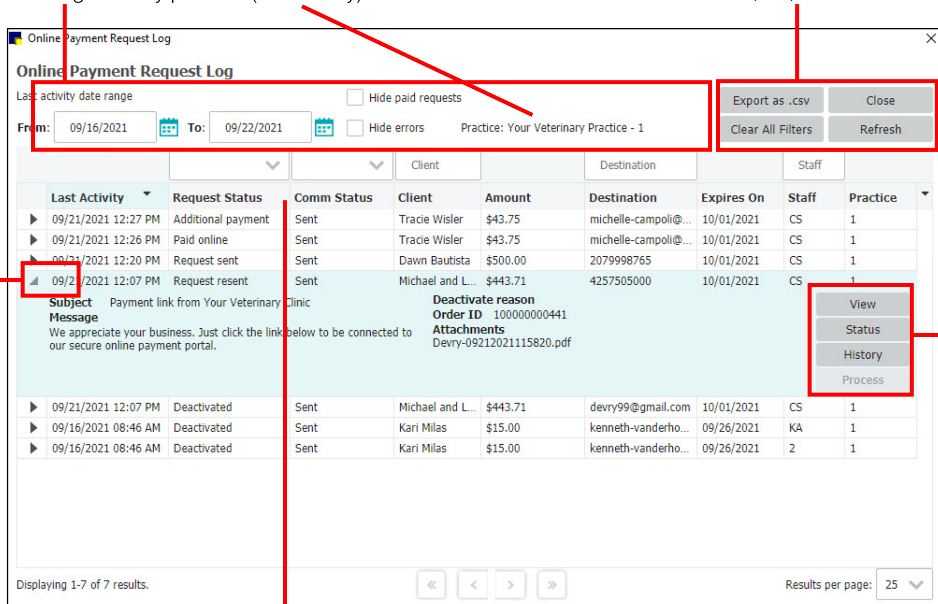
To…	Do this…
View a request	In the Client Account Information tab of the Patient Clipboard, right-click and select **Pay Online** *or* go to **Client Account window>Pay Online**.
Review all pending requests	Go to **Activities>Pay Online Request Log.** Adjust the date range and apply filters as needed.
Resend a request	Go to **Online Payment Request window>Request**. For MLSD practices, payments are associated with the practice that sent the original request, even when requests are resent from a different practice. To change the practice that receives the payment, cancel the request and send a new one from the preferred practice.
Modify a request	In the Online Payment Request window, update the payment amount, email or text number, subject, or message, and remove the attached invoice(s) (based on the configured vendor) as needed. Click **Request**. The original request is deactivated, and a new link is sent to your client. **Note**: When you resend a request, the original attachment will also be sent, based on the configured vendor.
Cancel a request	In the Online Payment Request window, click **Deactivate**. **Tip**: Deactivate any pending requests prior to writing off a client to avoid unbalanced accounts if the client uses the request link before deactivation is complete.

Using the Online Payment Request Log

Use the Online Payment Request Log to see the status of all current online payment requests. The log displays the past 5 days by default.

To access the log, go to **Activities>Pay Online Request Log.** In the log, you can:

- Change the date range for requests displayed in the log.
- Left-click column headers to toggle the ascending/descending sort order.
- View the log by practice (for MLSD practices only).
- View request details, status, and history.
- Export the log to a .csv (comma-separated values) file that can be imported into a spreadsheet.



***Tip:** Click **Status** to check the request directly with the card vendor and immediately process an in-progress payment, in infrequent cases where an outage occurred.

Request statuses and payment log actions

Status	Description
Request sent	Request has been made and emailed or texted to the client. For lingering requests, click **Status** to check details directly with your vendor.
Request resent	Request has been remade with a new order ID. Resending deactivates the original request. For lingering requests, click **Status** to check details directly with your vendor.
Paid online	The client's payment has been posted to their account.
Additional payment	More than one payment was made using the same request link. Treat it as a payment on account and address appropriately.
Deactivated	The client paid the requested amount, the original request was resent, or the request was manually deactivated or has expired.
Processing error	The system was busy (i.e., for end of period [EOP] processing) longer than the retry logic, and so the payment process was unable to complete. Click **Process** to complete payment processing.
Payment processing	The system is busy completing payment processing (i.e., for EOP processing).