OpenEdge

Integration Instructions for Edge Cloud

ORTHO2

The Edge Cloud/OpenEdge (formerly X-Web) integration allows you to take payments via credit card using OpenEdge's gateway. With OpenEdge, you can process point of sale (POS) or scheduled credit card payments through your Edge Cloud software electronically and securely.

Setup

Before you begin, Edge Cloud must be installed properly and an account must be set up through OpenEdge.

1 A payment account for OpenEdge credit card transactions must be set up in the Payment Account editor. Access the editors by selecting the **Editors** button in the Tools section of the Home ribbon bar.

2 Select Payment Accounts from the Financial editors listed along the left.

3 Use the Create New Payment Account options to set up a new payment account for OpenEdge transactions. Begin by entering a name for the account under Account Name and selecting Credit Card from the Receipt Type dropdown list.

4 Selecting Credit Card as the receipt type adds an additional Provider dropdown list. Select X-Web 1.0.

5 Click **Add**.

6 This adds the new payment account to the Credit Card section along the left. Select the new OpenEdge account to make the payment account's details available.

7 If necessary, specify a Default Description, Office, and Orthodontist for transactions posted using this payment account under the Account Details section.

8 In the Provider Details section, enter the X-Web ID, Terminal ID, Authentication Key, and Account Type provided by OpenEdge. Check the Disable Duplicate Mode checkbox in order to allow duplicate transactions to be posted to a single credit card.

9 Along the bottom of the screen there is an additional option for AutoReceipts. Checking this option allows AutoReceipts to be posted in Edge Cloud without an available payment processor.

Using the Integration

Storing Credit Card Information

In order to post AutoReceipt transactions, as well as charge a responsible party's credit card without the card in hand, the card must be stored as a Payment on File. This is done through the Responsible Party record.

1 Open the Responsible Party.

2 Click the **Add** link next to Payments on File along the right.

3 This will open the Payment on File Details window. Enter the billing details for the cardholder and click **Save**.

4 In the next window, swipe the responsible party's credit card using a card reader connected to the computer or manually type in the credit card number and expiration date.

5 Click **Submit** to submit the card information through OpenEdge.

6 Enter a payment on file description and click **Save**.

7 You should now see the card listed under Payments on File along the right. You can click the Update button to update the card information, or the Delete button to remove it from the responsible party's record.
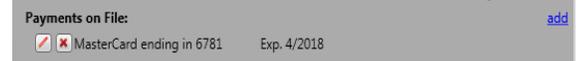
Posting Payments

Once credit card information has been stored as a payment on file, it can be used to post payments to that credit card account. Alternately, transactions can be manually posted to a credit card not stored within Edge Cloud.

1 Open a patient's *Post Transaction* window.

2 Click to select the contract to which you wish to post the payment.

3 Select the desired payment method. Any payments on file will be listed, along with an Other option that can be used to post manually.

4 If Other is selected, the Receipt Type and Account dropdown menus will appear. Select Credit Card as the receipt type and your OpenEdge payment account as the Account.

5 Fill in the Date, Amount, and Description details, and click **Post**.

6 A confirmation prompt will appear displaying the resulting balance and amount due. Click **Yes** to confirm.

7 If a payment on file was selected, the transaction will be processed through OpenEdge using the stored credit card information. If Other was selected, a prompt will appear to enter the responsible party's credit card information manually. Enter all required information and click **Submit** to process the payment through X-Web.
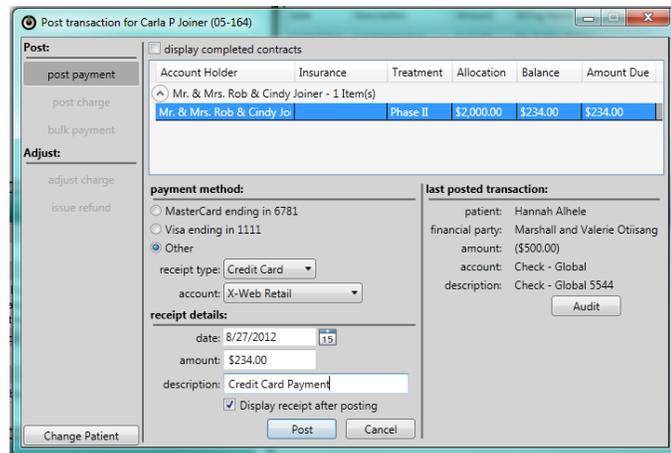
Posting AutoReceipts

The AutoReceipt feature allows you to set up regular automatic payments for your responsible parties' contracts. This allows you to save time posting payments when you have set up an agreement to charge their credit card every month or make

regular withdrawals from their bank account. You always have the opportunity to review and cancel any payments before posting them to Edge Cloud.

The process for creating AutoReceipts begins in the Responsible Party record.

1 Open a responsible party record.

2 The AutoReceipts section is located along the right side of the record under Payments on File. Click the **Add** link to set up a new AutoReceipt.

3 In the setup window that appears, select the appropriate type of AutoReceipt:

    a. **Auto payment:** This mode will automatically charge any amount due on the specified interval. The amount charged is the total of the amount due on all contracts and miscellaneous fees assigned to this responsible party.

    b. **Contract based:** This mode directly follows the charges of a specific contract. AutoReceipts will be posted as the contract fees become due. Any changes to the contract structure will automatically adjust the corresponding AutoReceipt.

    c. **Manual:** In this mode, AutoReceipt amounts and frequency are explicitly defined. Changes to the contract structure do not affect the AutoReceipt.

4 Once the AutoReceipt mode has been selected, click **Next**.

5 Use the *Edit Automatic Payment* window to specify details about how the AutoReceipt will behave. Set the Boundary dates, Payment on File, and Contract to use in this AutoReceipt where applicable. Manual mode has additional options to explicitly define the payment schedule.

6 Click **Finish** to save the AutoReceipt. The new AutoReceipt should now appear in the responsible party's record. Use the **Edit** button to edit the AutoReceipt details, or the **Delete** button to remove it from the responsible party's record.

Once an AutoReceipt has been created, a pending AutoReceipt payment will be placed in the Post AutoReceipts queue every time an AutoReceipt payment comes due.

You can filter this window using the Office or Orthodontist dropdown lists. To post the AutoReceipt transactions to the responsible parties' credit card accounts, manually check off the AutoReceipts to post. You can also use the **All** or **None** buttons at the top to select all pending AutoReceipts, or none of them.

Once the correct selections have been made, click **Post** in the lower right to process those transactions. If there are errors processing any of those transactions, the AutoReceipt will remain in the list with an error message.

If you would like to skip a patient this payment cycle, check off the patient(s) and click **Skip**. They will be removed from the AutoReceipt review window until their next payment becomes due.
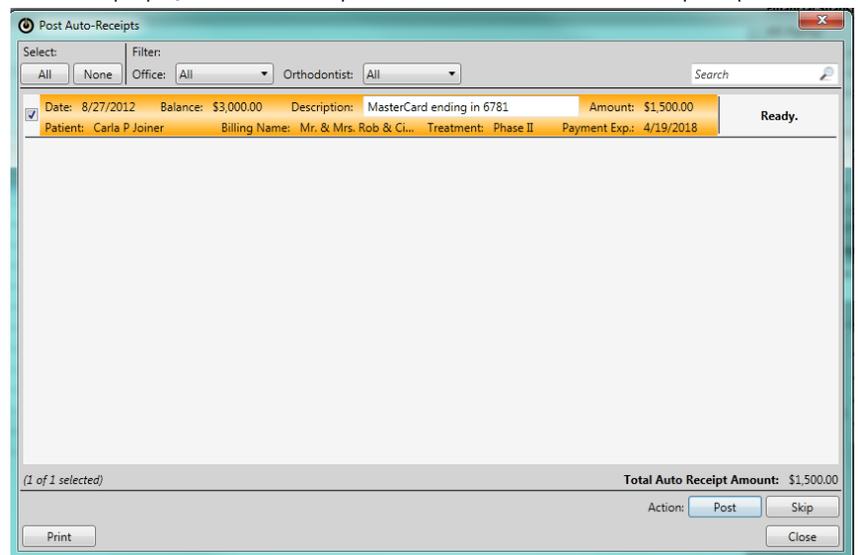
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