

OpenEdge

Integration Instructions for ViewPoint




The ViewPoint integration with OpenEdge allows you to easily process credit card and electronic funds transfer AutoReceipts through OpenEdge right from ViewPoint.

Setup

Before you begin, the OpenEdge software needs to be installed on your machine. OpenEdge will provide you with a Merchant Identification number (MID) for point of sale transactions, stored payments on files, and/or ACH transactions.

If you have an OpenEdge account for each orthodontist, enter the MID number in System Tables > System > Orthodontist. However, if you have an OpenEdge account for each office location, enter the MID number in System Tables > System > Office.

A screenshot of a software form for setting up OpenEdge. It contains four input fields: "X-Charge Card Present MID", "X-Charge Card On File MID", and "X-Charge ACH MID". Below these is a label "X-Charge Credentials:" followed by a key icon with a warning triangle.

You will also need to enter your OpenEdge credentials by clicking the  button in the respective table.

Using the Integration

The AutoReceipt feature allows you to set up regular automatic payments for your patients' 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 ViewPoint.

A contract with an AutoReceipt contract is indicated by an X in the AR column on the Contract tab of the patient folder.

Creating AutoReceipts

Create AutoReceipts in the Contract tab of the patient folder.

- 1 If this is a credit card AutoReceipt, click the Responsible Party tab and store the credit card on file using the "S" symbol to the right of Credit Card.
- 2 After you store your credit card, or for all other types of AutoReceipts, go to the Contract tab, select the contract for which you wish to create an AutoReceipt, and click the AutoReceipt button.
- 3 Click New and enter the details of your agreement with the responsible party.

Next Date: This is the next date on which you will automatically post a payment from this responsible party.

A screenshot of the "AutoReceipt Contract for Carla Joiner (LIM - J018 - MED)" dialog box. It shows fields for Billing Name, Subscriber, and a table with columns: Next Date, End Date, Interval, Amount, Description, and ACH. Below the table are fields for Next Date, End Date, Payment Interval (1 month(s)), Method (Credit Card), and Description. There are radio buttons for Payment Integration Type: Other, X-Charge (selected), Vanco, and Element. At the bottom, there are sections for ACH Information (Name on Check, Routing Number, Account Number, Retype Account Number) and Account Type (Checking, Saving) and Check Type (Personal, Business). Buttons for New, Save, Remove, Remove All, OK, and Cancel are at the bottom.

End Date: This is the date on which you will automatically post the last payment of this amount.

Payment Interval: Enter how often a payment should be processed, in either weeks or months. Many plans occur 1 time each month. Quarterly payments would be processed at an interval of 3 months.

Amount: Enter the amount of each payment.

Method: This is the method of payment. Both Credit Card and Electronic Transfer can be used with the OpenEdge integration.

Description: The description you enter here will appear on the Auto Receipt Review window when you review pending payments.

- 4 Under Payment Integration Type, select X-Charge.
- 5 If this is an electronic transfer AutoReceipt, fill in the additional ACH Information fields.
For security, after you exit and reenter the *AutoReceipt Contract* window, all but the last digits of the routing and account numbers will be masked out. If you need to make any changes, you will need to completely retype both numbers.
- 6 Click Save. The new AutoReceipt contract now appears in the list.
- 7 If necessary, create a second AutoReceipt contract for any additional payments this party has agreed to make on different dates or for different amounts. For example, a final payment at a lower amount.
- 8 Click OK.

Contact

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