

DENTRIX ENTERPRISE

DENTRIX ENTERPRISE PAY TASK GUIDE
(Setup & Usage for Versions up to 11.0.2 Update 7)

Publication Date

January 2022

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Introduction & Setup

With Dentrix Enterprise Pay, you can process credit card payments in Dentrix Enterprise. The credit card processing features of Dentrix Enterprise Pay are available as an add-on. Worldpay is the third-party provider of the credit card transaction service, so you must purchase Worldpay merchant accounts. You must also purchase compatible credit card readers.

This guide will help you understand how to set up and use Dentrix Enterprise Pay. You can download and print this document from the Resource Center at www.dentrixenterprise.com.

This chapter covers the following topics:

- Prerequisites
- Connecting Payment Devices
- Configuring Integration Settings
- Setting Up Payment Types

Prerequisites

Before you can set up or use Dentrix Enterprise Pay, you must perform the following tasks:

- A.** Install Dentrix Enterprise 11.0.2 Update 3 or later. To take advantage of all the functionality described in this guide, you must install the latest version of Dentrix Enterprise (11.0.2 Update 4 is the current version at the time of writing this guide).
- B.** Contact Worldpay to register for merchant accounts. You should have one account per clinic.
- C.** For each merchant account, purchase credit card readers from Worldpay.
- D.** Contact Dentrix Enterprise Customer Support at (800) 459-8067, so a technician can enable Dentrix Enterprise Pay.

Connecting Payment Devices

Before you can use Dentrax Enterprise Pay to process credit card payments, you must connect payment devices, such as the Ingenico iSMP4 and the Verifone MX 915, to your office network.

Dentrax Ascend Pay supports the following payment devices:

- Ingenico iSMP4
- Ingenico iPP 320
- Ingenico iSC Touch 250
- Verifone MX 915

Ingenico iSMP4

Follow these steps to connect an Ingenico iSMP4 device to your office network.



Caution: If the Ingenico iSMP4 is plugged into the charger, and the charger is plugged into an outlet, do not power the device on or off. Unplug the device first, and then power it on or off. Failure to do so can result in damage to the device. For more details, refer to the iSMP4 documentation.

To connect an iSMP4 payment device

1. If it is not already installed, lift the battery door on the back of the iSMP4, and then insert the battery that came with your iSMP4.

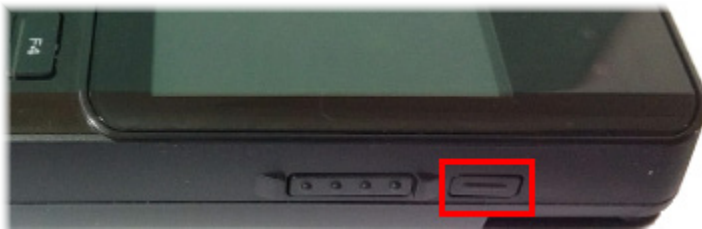


2. To begin charging the battery, plug in the iSMP4 using the power adapter or USB cable that came with your device.



Note: It may take a few hours or more to fully charge the battery for the iSMP4

3. Once the battery is fully charged (as indicated on the iSMP4 display), press and hold the power button (on the right side of the device) for a few seconds to turn it on.



After the display changes a few times, **This Lane Closed** appears onscreen. You are ready to connect the device to your wireless network.

4. Press the F key four times to access the **Communication Settings** screen.
5. Press the F4 key to access the **Configured Access Points** screen.
6. Press the F1 key to scan for available WiFi networks.

When the scan is complete, a list of available WiFi networks appears.

7. Using the F2 key, select your WiFi network, and then press the green key.

Note: Your office's WiFi network should be password protected.

The **Select Security** screen appears.

8. Select **WPA/WPA2**, and then press the green key.

The **Enter Password** screen appears.

9. Enter the password for the WiFi network that you are connecting to, and then press the green key.

Note: You enter numbers and letters with the number keys. Each press of a number key cycles through the number, the lowercase letters, and then the uppercase letters that appear on that key. You enter special characters with the pound or hash (#) key.

10. Press the green key to save the settings.

The display flashes and eventually an activation code appears, indicating that the device is connected to your wireless network and ready to be activated.



Note: If the device cannot connect to Worldpay's triPOS Cloud to retrieve an activation code, the device will display the triPOS logo instead of an activation code. Verify that the device is correctly connected to your network and has Internet access. Also, you may need to configure the device's settings differently to work with your network.

Ingenico iPP 320

Follow these steps to connect an Ingenico iPP 320 device to your office network.



To connect an iPP 320 payment device

1. Connect the HDMI end of the communication cable to the back of the device.



2. Connect the Ethernet end of the communication cable to your network router or switch.
3. Connect the power cord to the receptacle on the communication cable (at a point along the cable, toward the Ethernet end, there is a block with a power jack).



4. Plug in the power adapter.

When the device has power, it turns on automatically and begins the boot process. Eventually, an activation code appears on screen, indicating that the device is connected to your network and ready to be activated.



Note: If the device cannot connect to Worldpay's triPOS Cloud to retrieve an activation code, the device will display the triPOS logo instead of an activation code. Verify that the device is correctly connected to your network and has Internet access. Also, you may need to configure the device's settings to work with your network.

Ingenico iSC Touch 250

Follow these steps to connect an Ingenico iSC Touch 250 device to your office network.



To connect an iSC Touch 250 payment device

1. Connect the included stylus to the port on the top of the device.



2. Connect the HDMI end of the communication cable to the back of the device.



3. Connect the Ethernet end of the communication cable to your network router or switch.

4. Connect the power cord to the receptacle on the communication cable (at a point along the cable, toward the Ethernet end, there is a block with a power jack).



5. Plug in the power adapter.

When the device has power, it turns on automatically and begins the boot process. Eventually, an activation code appears on screen, indicating that the device is connected to your network and ready to be activated.



Note: If the device cannot connect to Worldpay's triPOS Cloud to retrieve an activation code, the device will display the triPOS logo instead of an activation code. Verify that the device is correctly connected to your network and has Internet access. Also, you may need to configure the device's settings to work with your network.

Verifone MX 915

Follow these steps to connect a Verifone MX 915 device to your office network.

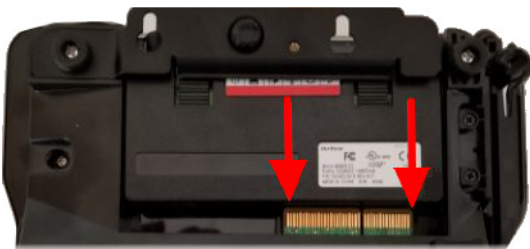


To connect an MX 915 payment device

1. Connect the power adapter and the Ethernet cable to the communications module.



2. Insert the communications module into the top of the device with the tabs facing outward. The module will click into place when it is fully inserted.



3. Connect the other end of the Ethernet cable to your network router or switch.
4. Plug in the power adapter.

When the device has power, it turns on automatically and begins the boot process. Eventually, an activation code appears on screen, indicating that the device is connected to your network and ready to be activated.



Note: If the device cannot connect to Worldpay's triPOS Cloud to retrieve an activation code, the device will display the triPOS logo instead of an activation code. Verify that the device is correctly connected to your network and has Internet access. Also, you may need to configure the device's settings to work with your network.

Configuring Integration Settings

Before you can use Dentrix Enterprise Pay to process credit card payments, you must configure the integration settings for Dentrix Enterprise Pay for each clinic.

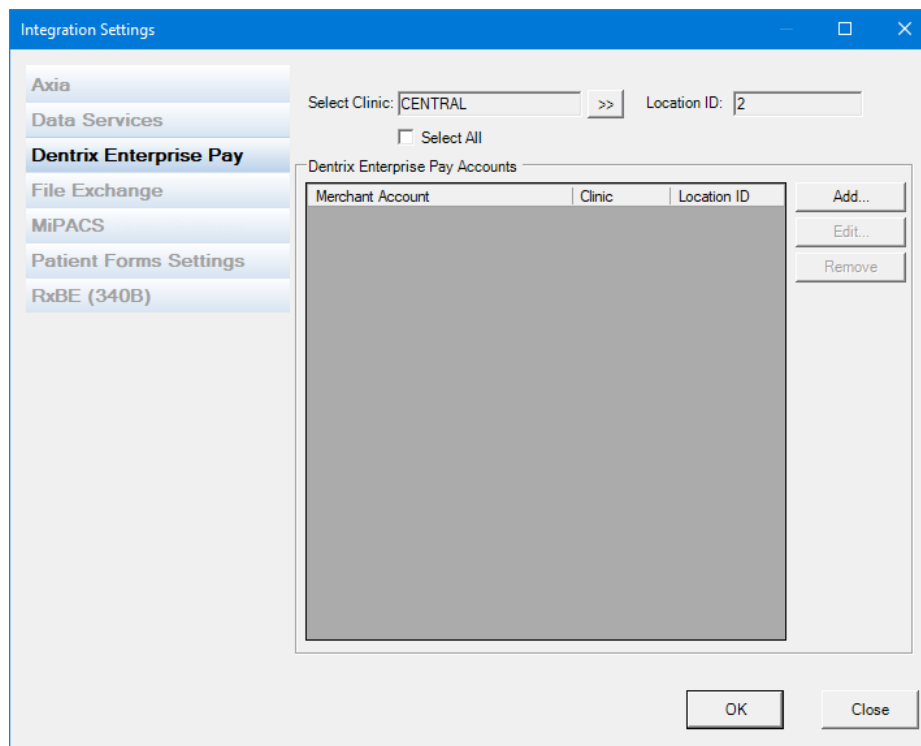
To configure Dentrix Enterprise Pay for a clinic

1. While logged in to the Central clinic, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Integration Settings**.

The **Integration Settings** dialog box appears.

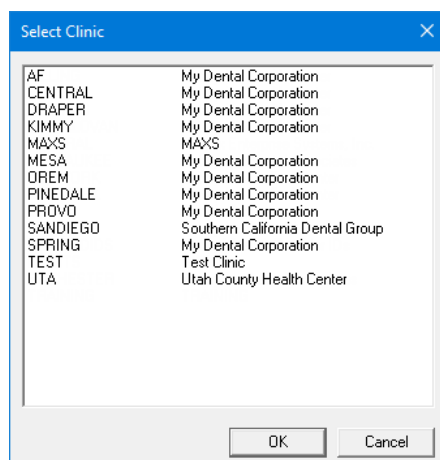
2. Select the **Dentrix Enterprise Pay** tab on the left.

The options for setting up Dentrix Enterprise Pay appear on the right.



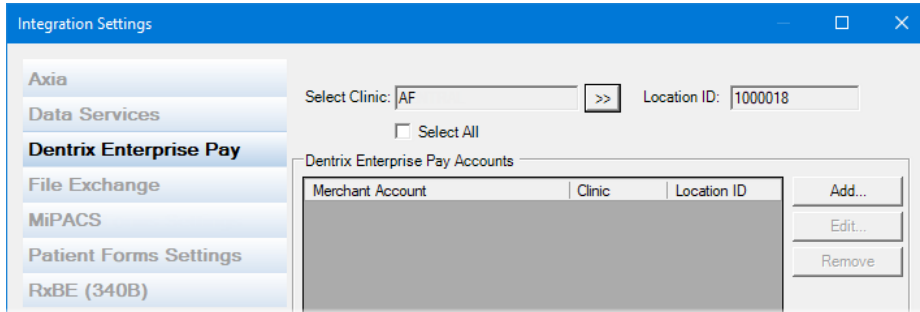
3. Click the **Select Clinic** search button .

The **Select Clinic** dialog box appears.



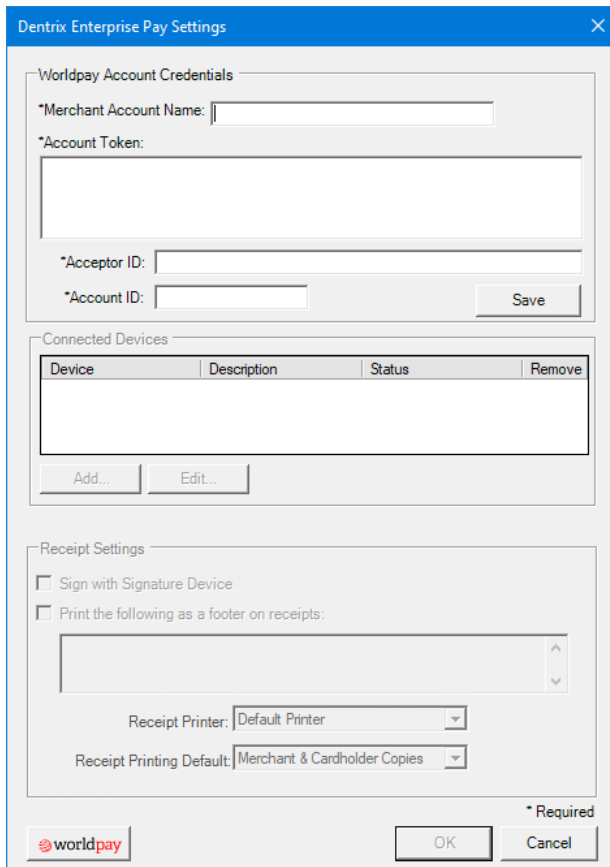
4. Select a clinic.
5. Click **OK**.

The option to add a Dentrix Enterprise Pay account becomes available.



6. Under **Dentrix Enterprise Pay Accounts**, click **Add**.

The **Dentrix Enterprise Pay Settings** dialog box appears.



7. Under **Worldpay Account Credentials**, set up the following options:
 - **Merchant Account Name** – Enter a name to identify the Worldpay merchant account for the clinic.
 - **Account Token** – Copy the account token that you received from Worldpay to the Windows Clipboard by selecting the token and pressing Ctrl+C, and then paste it into the **Account Token** box by pressing Ctrl+V.
 - **Acceptor ID** – Enter the Worldpay acceptor ID.
 - **Account ID** – Enter the Worldpay account ID.
8. Click **Save**.

With the Worldpay merchant account credentials saved, the option to add payment devices appears.

9. For each payment device that you want to add, do the following:

a. Under **Connected Devices**, click **Add**.

The **Device Setup** dialog box appears.

b. Set up the following options:

- **Description** – Enter a short description to identify the device in Dentrix Enterprise.
- **Idle Screen Message** – If desired, enter a short message to be displayed on the payment device instead of the triPOS logo.
- **Activation Code** – Enter the activation code that is displayed on the payment device (see “Connecting Payment Devices” on page 2).

c. Click **OK**.

In the **Dentrix Enterprise Pay Setup** dialog box, the activated device appears in the **Connected Devices** list and has an **Open** status.

Device	Description	Status	Remove
iSMP4	Back iSMP4	Open	

Also, with at least one connected device, the options for receipts are available.

10. Under **Receipt Settings**, set up the following options:

- **Sign with Signature Device** – To allow patients to sign receipts using a separate signature pad, select this check box. You can select this check box only if an ePad has been set up in the Document Center. For a Verifone MX 915, which has built-in signature capability, do not select this check box.

Note: Dentrix Enterprise Pay supports the following signature pads:

- ePad II
- ePad-ink
- ePad-vision
- **Print the following as a footer on receipts** – To display a note or message at the bottom of each customer receipt, select this check box, and then enter the desired text. To not include a footer, clear this check box.
- **Receipt Printer** – Select the printer that you want to use to print receipts. By default, the Windows default printer is selected.
- **Receipt Printing Default** – Select whether you want the default selection for printing receipts to be only merchant receipts, only customer receipts, or both. When printing a receipt, you can change the selection.

Note: You can click **Worldpay** to open the Worldpay IQ website. After you log in to the website, you can view payment processing reports and manage your account.

11. Click **OK**.

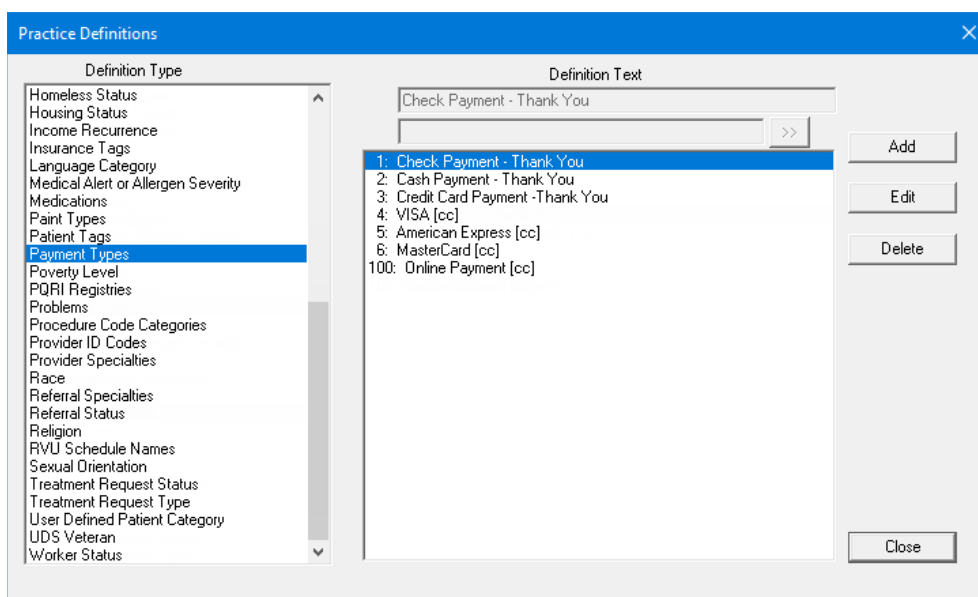
Setting Up Payment Types

Add or edit the payment types that you want to use for processing credit cards through Dentrax Enterprise Pay.

To add or edit a payment type

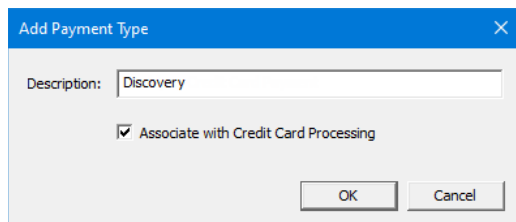
1. In the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Definitions**.

The **Practice Definitions** dialog box appears.



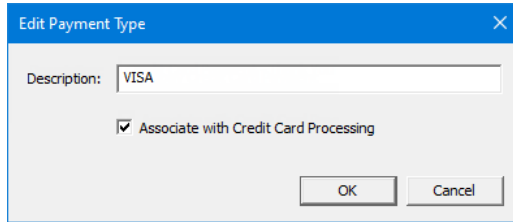
2. From the **Definition Type** list, select **Payment Types**.
3. Do one of the following:
 - To add a payment type, click **Add**.

The **Add Payment Type** dialog box appears.



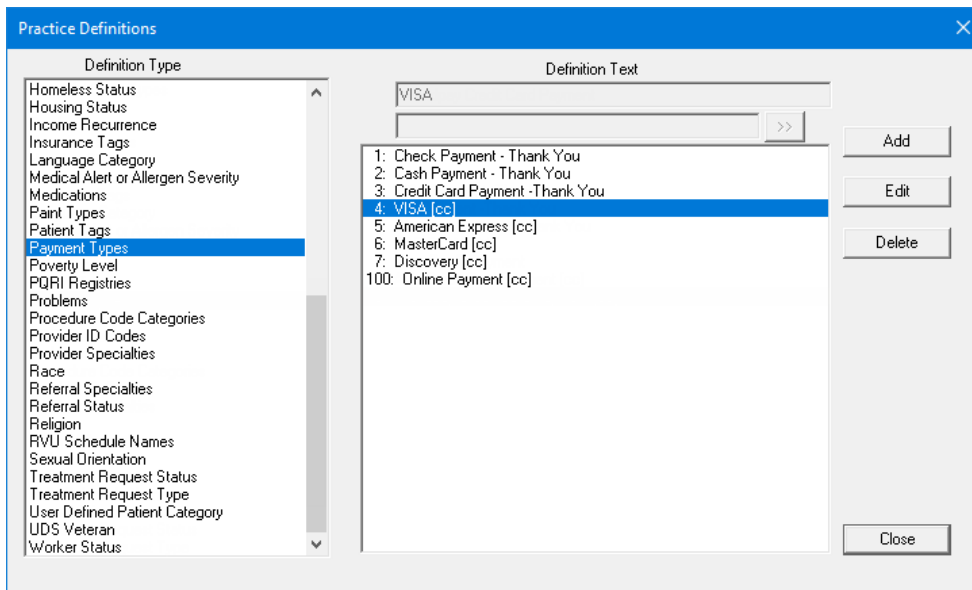
- To edit a payment type, select it, and then click **Edit**.

The **Edit Payment Type** dialog box appears.



4. Enter a **Description**.
5. Select the **Associate with Credit Card Processing** check box.
6. Click **OK**.

If you added a payment type, it now appears in the list.



7. Click **Close**.

Usage

This chapter explains how to process payments with Dentrix Enterprise Pay. This chapter covers the following topics:

- Posting Credit Card Payments
- Reprinting Credit Card Receipts
- Viewing Transaction Reports

Posting Credit Card Payments

You can post a credit card payment through Dentrix Enterprise Pay similar to how you post a payment without Dentrix Enterprise Pay, but there are a few differences.

Important: The Dentrix Enterprise Pay features are available only if the integration settings for Dentrix Enterprise Pay have been set up for the clinic that you are currently logged in to. The clinic must have a merchant account and a payment device associated with it.

To post a credit card payment

1. While posting a payment from the **Enter Payment** dialog box, from the **Type** list box, select the correct payment type. If the selected payment type has a “[cc]” at the end of the name, you can use it to process a credit card through Dentrix Enterprise Pay.

The screenshot shows the 'Enter Payment' dialog box with the following details:

- Operator:** DSMITH
- Collecting Clinic:** AF
- Date:** 09/02/2020
- Amount:** 37.00
- Type:** VISA [cc] (selected)
- Charges for:** James Abbott
- Payment method:** <None>
- Payment Plan:** Restorations-Dan
- Credit Card Terminal:** Front Desk
- Note:** (Empty text area)
- Buttons:** Apply Remaining, Remove Applied, Do not automatically allocate (checkbox), Process Card, Cancel

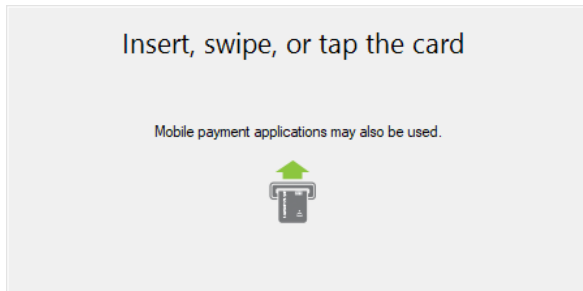
Date	Encounte...	Code	Th	Patient	Provider	Clinic	Charge	Other ...	Guar ...	Applied	Balance
------	-------------	------	----	---------	----------	--------	--------	-----------	----------	---------	---------

2. From the **Credit Card Terminal** list, select the payment device that you want to use to process the payment.

Note: If the desired device is not available, try refreshing the list by clicking the **Refresh** button .

3. Once you enter the **Amount** and other payment details, click **Process Card**.

A message appears and indicates that the device is ready for input (such as inserting, swiping, or tapping the card).



4. The cardholder follows the prompts on the payment device to insert, swipe, or tap using a card or a mobile payment application on a smartphone.
5. If the payment device prompts the cardholder to do so, he or she selects **Debit** or **Credit** on the device and then confirms the amount displayed.

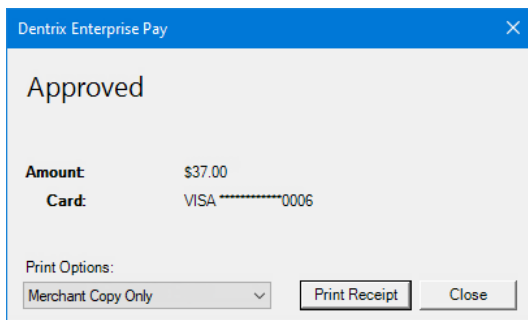
The card is processed through Worldpay.

6. If the transaction is approved, and if a signature is required by the credit card issuer, the cardholder signs on the ePad or payment device as directed by the device.

Note: Digital signatures are possible only if signing with a signature pad has been enabled for the current clinic (see “Configuring Integration Settings” on page 11) and if either an ePad has been set up or the payment device being used has built-in signature capability (such as the Verifone MX 915).

7. If the cardholder signed with an ePad, in the **Dentrix Signature Capture** dialog box, click **OK** to save the signature.

Once the transaction has been processed, the **Dentrix Enterprise Pay** dialog box appears, indicating whether the card was approved or declined.



8. Do one of the following:
 - To print a receipt for the payment, do the following:
 - a. From the **Print Options** list, select whether you want to print only a merchant receipt, only a cardholder receipt, or merchant and cardholder receipts.

Note: The default selection is determined by the receipt settings for the current clinic (see “Configuring Integration Settings” on page 11).

b. Click Print Receipt.

The receipt is sent to the printer that was specified in the receipt settings for the current clinic (see “Configuring Integration Settings” on page 11).

My Dental Corporation
1234 Pine Drive
American Fork, UT 11111

Wednesday, September 02, 2020 06:35:51

Patient Name Abbott, James S
Type SALE
Account VISA
Card Number *****0006
Order ID 07033-51202-092020
Reference Number 59426728

AMOUNT \$37.00

Entry Swiped
Response Code 00/Approved
Approval Number 251040

APPROVED - THANK YOU

Signature

*** Merchant Copy ***

- To not print a receipt, click **Close**.

Note: If needed, you can print a receipt later (see “Reprinting Credit Card Receipts” on page 20).

Reprinting Credit Card Receipts

You can view and reprint a receipt for a credit card payment that was posted using Dentrix Enterprise Pay.

To reprint a receipt

1. In a patient's Ledger, double-click a credit card payment.
The **Void/Refund Credit Card Payment** dialog box appears.

2. Click **Reprint Receipt**.
The **Print Receipt** dialog box appears.

3. From the **Print Options** list, select whether you want to print only a merchant receipt, only a cardholder receipt, or merchant and cardholder receipts.
4. Click **Print**.

The receipt is sent to the printer that was specified in the receipt settings for the current clinic (see “Configuring Integration Settings” on page 11).

My Dental Corporation
1234 Pine Drive
American Fork, UT 11111

Wednesday, September 02, 2020 06:35:51

Patient Name Abbott, James S
Type SALE
Account VISA
Card Number *****0006
Order ID 07033-51202-092020
Reference Number 59426728

AMOUNT \$37.00

Entry Swiped
Response Code 00/Approved
Approval Number 251040

APPROVED - THANK YOU

Signature _____

IMPORTANT - retain this copy for your records

Thank you and come again!

Viewing Transaction Reports

Through your clinic's Worldpay merchant account, you can view transaction reports online. For questions regarding those reports, contact Worldpay customer service at (800) 846-4472.

To view transaction reports

1. While logged in to the Central clinic, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Integration Settings**.

The **Integration Settings** dialog box appears.

2. Select the **Dentrix Enterprise Pay** tab on the left.

The Dentrix Enterprise Pay settings appear on the right.

Integration Settings

Axia
Data Services
Dentrix Enterprise Pay
File Exchange
MiPACS
Patient Forms Settings
RxBE (340B)

Select Clinic: AF >> Location ID: 1000018

Select All

Dentrix Enterprise Pay Accounts

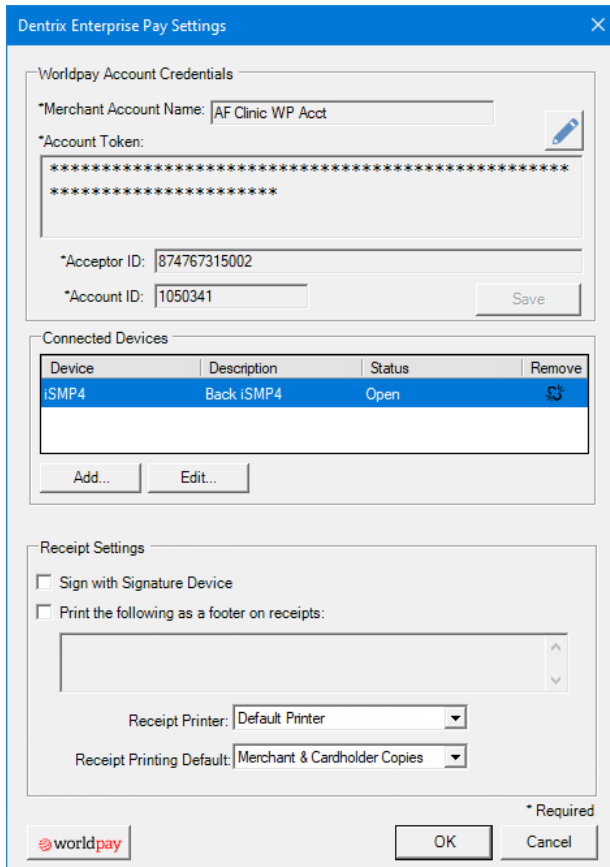
Merchant Account	Clinic	Location ID	Add...
AF Clinic WP Acct	AF	1000018	Edit...
			Remove

- Under **Dentrix Enterprise Pay Accounts**, select an account.

Note: You can click the **Select Clinic** search button  to select a specific clinic and see the accounts that have been added for that clinic only, or select the **Select All** check box to see the accounts that have been added for any clinic.

- Click **Edit**.

The **Dentrix Enterprise Pay Settings** dialog box appears.



Dentrix Enterprise Pay Settings

Worldpay Account Credentials

*Merchant Account Name: AF Clinic WP Acct


*Account Token: *****

*Acceptor ID: 874767315002

*Account ID: 1050341

Save

Connected Devices

Device	Description	Status	Remove
iSMP4	Back iSMP4	Open	

Add... Edit...

Receipt Settings

Sign with Signature Device

Print the following as a footer on receipts:

Receipt Printer: Default Printer

Receipt Printing Default: Merchant & Cardholder Copies

* Required

worldpay OK Cancel

- In the lower-left corner, click **Worldpay** to open the Worldpay IQ website in your default browser.