

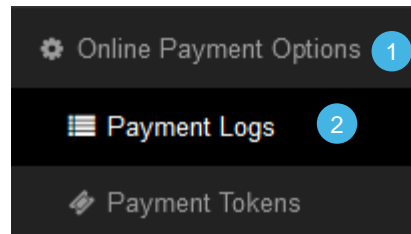
# AutoMed Payment Logs Guide

This guide will take you through how to use Payment Logs to view payment statuses .

## Access Payment Logs

From the main menu:

1. Select **Online Payment Options**
2. Click **Payment Logs** to view the report



## Payments Logs

Using Payment Logs, you'll be able see the status of individual payments.

### Why use this report?

Using this report daily, you'll be able to keep track of payments received to your clinic

Here are some of the things you can view and do in Payment Logs:

- View completed, failed or duplicate payments
- Process a refund

## How to use Payment Logs

Fill out the required filters:

1. Enter your **Start** and **End Date** (you can run the report for 90 days)
2. Select **location** (if required)
3. Choose a Doctor or leave the filter at **Select Doctor**, to show all Doctors in your clinic
4. Select a Source or leave the filter at **Source**, to view all
5. Choose **All Status** to view all payment status, or choose **Completed**, to view only completed payments
6. Enter a **Patient Name** (if required)
7. Click **Filter** to load

## Payment Logs

Filter

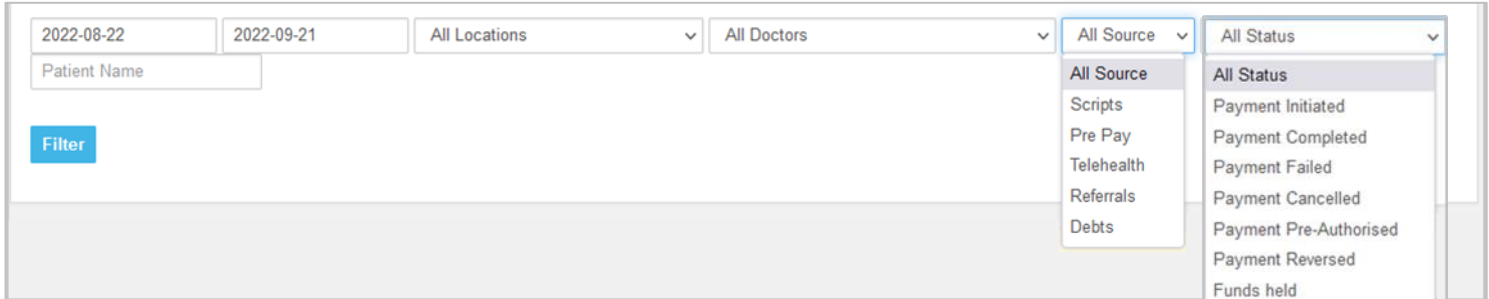
2022-08-17	2022-09-16 <span style="float: right;">1</span>	All Locations <span style="float: right;">2</span> <span style="float: right;">v</span>	All Doctors <span style="float: right;">3</span> <span style="float: right;">v</span>
All Source <span style="float: right;">4</span>	All Status <span style="float: right;">5</span> <span style="float: right;">v</span>	Patient Name <span style="float: right;">6</span>	

7
Filter
CSV Export

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## Source Filter

In Payment Logs you can choose different sources, to see where the payment came from.



Status	What does it show
All Sources	Shows all sources
Scripts	Shows payments received via scripts
Pre Pay	Shows payments received via pre-paid appointments
Telehealth	Shows payments received via post-paid appointments
Referrals	Shows payments received via referrals
Debts	Shows payments received via the Debtors Book

## Status Filter

In Payment Logs you can choose different status, to see what is happening with a payment

Status	What does it show
All Status	Shows all statuses
Payment Completed	Shows successful payments
Payment Failed	Shows failed payments
Payment Cancelled	Shows cancelled payments
Payment Initiated	Shows patients who did not enter card details when booking the appointment <b>Please Note:</b> Patients who do not enter card details, will not secure the appointment when booking online
Payment Pre-Authorised	Shows patients who have entered card details when booking the appointment <b>Please Note:</b> Patients who have entered card details will secure the appointment when booking online
Payment Reversed	Shows payments which have been refunded
Funds Held	Funds placed on hold will show as Pre-Authorised

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## Payment Status

To view more details of a payment status, click View Details in the payment row.

## Completed Payments

When you click the View Details of **Completed Payments**, you'll be able to see the card holder details, card type and issuer codes.

**Please note:** The card details will be tokenised and you'll not be able to view the full card number

Fees	Surcharge Amount	Payment Status	
\$75.00		 Completed	<a href="#">View details</a>
\$75.00		 Completed	<a href="#">View details</a>
\$75.00		 Completed	<a href="#">View details</a>
\$75.00		 Completed	<a href="#">View details</a>

### Payment Details

Transaction Details
Notes

<b>Order Id:</b> Order Status: CAPTURED Amount: 75 Acquirer Code: APPROVED Gateway Code: APPROVED Result: SUCCESS	<b>Tx DateTime:</b> Card Number Expiry: 2-23 Card Type: MASTERCARD Email:
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**Additional Information**





Issuer Action Code: 00

Issuer Action Code Description: Approved or completed successfully

## Failed Payments

When you click the View Details of **Failed Payments**, you'll be able to see why the card details did not process.

**Please note:** You may be able to retry the payment, if the payment failed on the day.

Fees	Surcharge Amount	Payment Status	
\$75.00		 Failed <span style="background-color: #28a745; color: white; padding: 2px 5px; font-weight: bold;">Retry Payment</span>	<a href="#">View details</a>
\$75.00		 Failed	<a href="#">View details</a>
\$75.00		 Failed	<a href="#">View details</a>
\$75.00		 Failed	<a href="#">View details</a>

### Payment Details

Transaction Details
Notes

<b>Order Id:</b> Order Status: FAILED Amount: 75 Acquirer Code: DECLINED Gateway Code: DECLINED Result: FAILURE	<b>Tx DateTime:</b> Card Number: Expiry: 3-23 Card Type: MASTERCARD Email:
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**Additional Information**

Issuer Action Code: 51

Issuer Action Code Description: Insufficient funds/over credit limit

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## Payment Pre-Authorised

There are two options for **Pre-Authorised payments** which can be set up for appointments type:

### Card Collection

To confirm card details are valid, the system will debit and credit a dollar, once this happens the Payment Status will change from Payment Initiated to Payment Pre-Authorised.

Click the **View Details** of **Payment Pre-Authorised**, to view the payment details verified at the time of booking

Fees	Surcharge Amount	Payment Status
		 Pre- Authorised <a href="#">View details</a>
		 Pre- Authorised <a href="#">View details</a>
		 Pre- Authorised <a href="#">View details</a>

**Payment Details** ✕

Transaction Details Notes

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Status: VALID  
Gateway Code: BASIC\_VERIFICATION\_SUCCESSFUL  
Result: SUCCESS

Card Number:  
Expiry: 0724  
Card Type: VISA  
Email:

[Close](#)

### Funds Held




Funds are placed on hold on the patient's card at the time of making the booking.

Funds are automatically released if:

- The appointment is not completed within 7 days
- If the consult is bulk billed

If the doctor charges a different amount specified in the appointment type, AutoMed will automatically void the hold and charge the correct amount.

Click the **View Details** of **Payment Pre-Authorised**, to view the payment details and release funds.

Fees	Surcharge Amount	Payment Status
\$61.55		 Pre- Authorised <a href="#">View details</a>
\$61.55		 Pre- Authorised <a href="#">View details</a>
\$61.55		 Pre- Authorised <a href="#">View details</a>

**Payment Details** ✕

Transaction Details Notes

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Status: VALID  
Gateway Code: BASIC\_VERIFICATION\_SUCCESSFUL  
Result: SUCCESS

Card Number:  
Expiry: 0124  
Card Type: MASTERCARD  
Email:

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**Authorization Information**

Status: SUCCESS  
Issuer Action Code: 00  
Issuer Action Code Description: Approved or completed successfully

To release funds placed on hold please click "Release hold on funds" button.

[Release hold on funds](#)

**Please Note:** Once a payment is complete, the status will change from Pre-Authorised to **Completed**.

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## Capture in PMS (Practice Management System) Manually

If you see **Please Capture in PMS Manually** in the status column, it means the amount could not be written back to your PMS.

Source	Gateway	Date	Location	Doctor	Patient	Fees	Surcharge Amount	Payment Status
6-26402	Debts	tyro	2022-09-05 15:25:47					✓ Completed <b>Please capture in PMS manually</b>

### What you need to do:

Check the patient's account has been settled in your PMS

**If the payment has settled in your PMS:**

1. Click on **Please Capture in PMS Manually**
2. Click **Yes, Continue**

In **Payment Logs**, the payment will flag as completed.

**If the payment has not settled in your PMS:**

Please capture the payment in your PMS and follow the above steps.

Surcharge Amount	Payment Status
1	✓ Completed <b>Please capture in PMS manually</b>

**Would you like to flag this payment as Completed in AutoMed?**

**Please note:**

- The indicated funds were collected from the patient and will clear in your bank account
- The payment has not saved to your PMS (BP / PracSoft). This can happen when there is a duplicate payment or when the invoice amount in your PMS does not match the payment processed.
- Please confirm that the patient's account has been settled in your PMS.

Cancel
2  
Yes, Continue

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## Reversed Payments

When you click the View Details of **Reversed Payments**, you'll be able to see the details of a processed refund.

In the Payment Status column, the refund will be highlighted in orange in the patient row and will show the date and time the refund was requested.

\$83.00	<span style="font-size: 1.2em;">✔</span> <b>Completed</b> Refund requested on: 2022-09-15 16:49:41	<a href="#">View details</a>
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**Payment Details**

<b>Order Id:</b> Order Status: CAPTURED Amount: 83 Acquirer Code: APPROVED Gateway Code: APPROVED Result: SUCCESS	<b>Tx DateTime:</b> Card Number: Expiry: 7-25 Card Type: VISA Email:
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**Additional Information**

Issuer Action Code: 00  
 Issuer Action Code Description: Approved

Refund Completed.

## How to request a Refund

A refund can only be requested for a Completed Payment.

To request the refund:

1. Click on View Details in the payment row

In Payment Details:

2. Enter a Refund Reason
3. Click Request Refund

Once completed, you'll see **Refund Completed**

Fees	Surcharge Amount	Payment Status	
\$75.00		✔ Completed	<span style="border: 1px solid #007bff; border-radius: 50%; padding: 2px 5px;">1</span> <a href="#">View details</a>

Refund Amt.	\$75
<span style="border: 1px solid #007bff; border-radius: 50%; padding: 5px 10px; font-size: 1.5em;">2</span> Refund Reason	<span style="border: 1px solid #007bff; border-radius: 50%; padding: 5px 10px; font-size: 1.5em;">3</span>

Request Refund

## Need further assistance?

Reach out to our [Support Team](#) for any day-to-day assistance with AutoMed System

- Email: [support@automedsystems.com.au](mailto:support@automedsystems.com.au)