

Billink Online Payment Requests

Requires Socrates Version 2.7.9 or later.

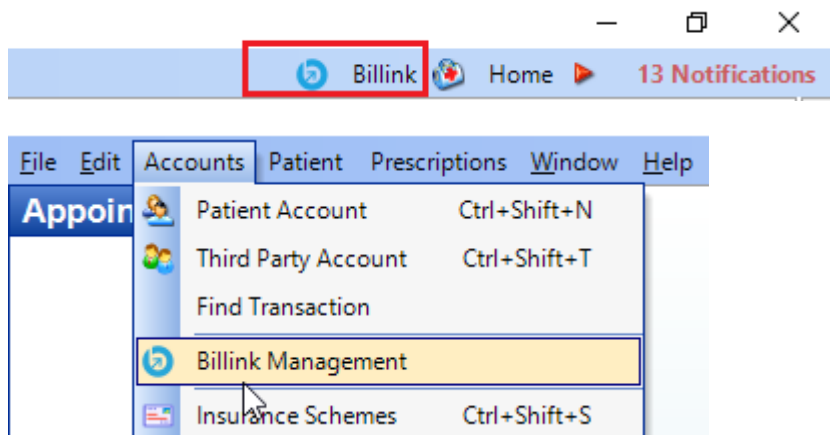
Practices who register with Billink can send an online payment link to the patients mobile number. The patient can click this link and complete the payment online. The practice can view all payment requests and their status in Socrates. Online payments processed by Billink will show as payments in the patients chart. For more information please visit the Billink website at: <https://billinkpayments.com> or email: contact@billinksupport.com

Contents

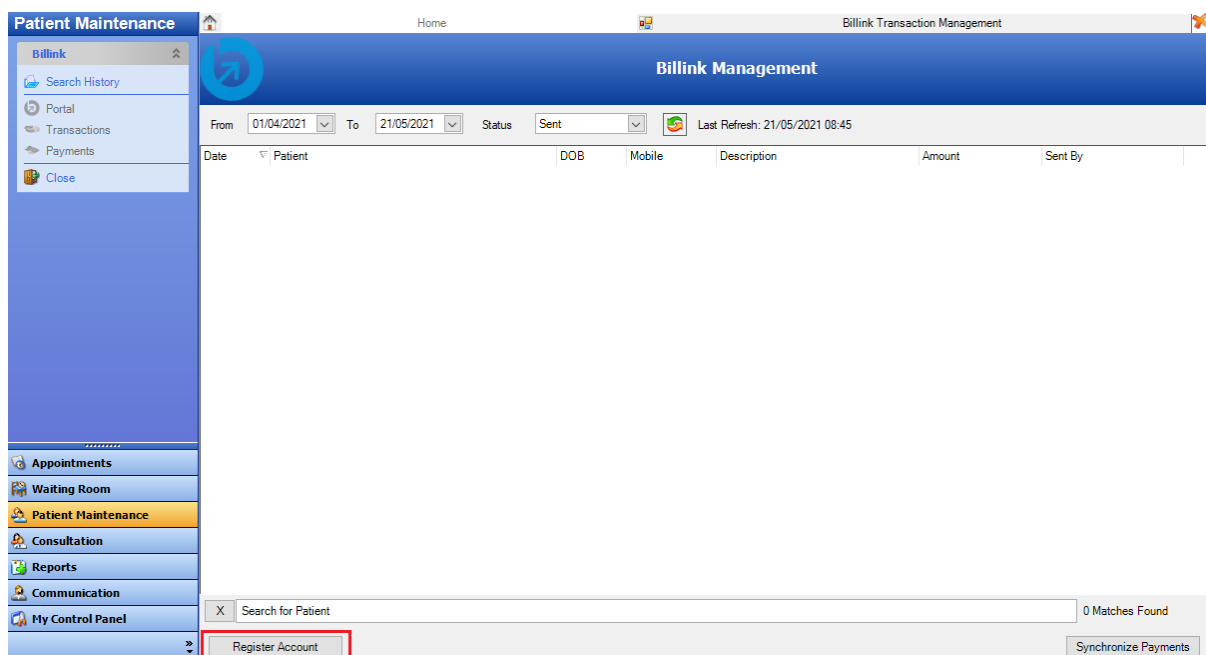
Billink Registration	2
Payment Request	9
Search History	12
Billink Portal	13
Patients Account	14
Patient.....	15

Billink Registration

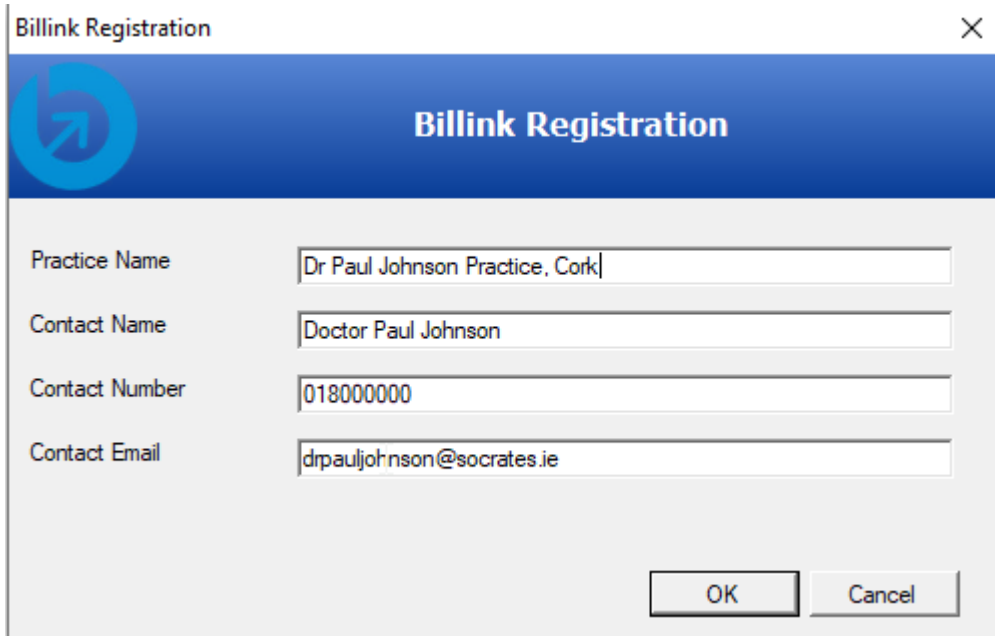
Once Billink has been enabled you will see the **Billink** button on the top menu bar and the **Billink Management** menu item in the Accounts main menu.



If you open Billink Management from the Accounts menu, click **Register Account** button to create a Billink account.

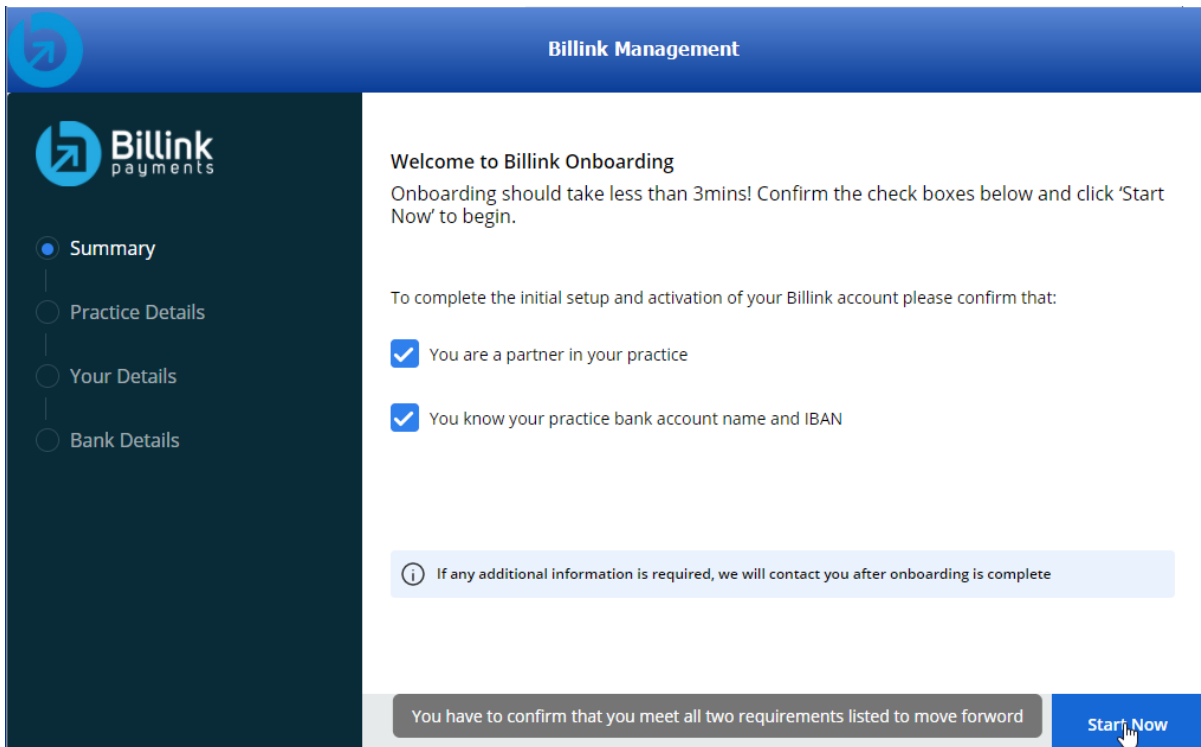


From the Billink button on the main menu, the registration screen will be displayed. Enter your Practice details and click OK.



The screenshot shows a 'Billink Registration' dialog box with a blue header and a white body. The header contains the Billink logo and the text 'Billink Registration'. The body contains four input fields: 'Practice Name' (filled with 'Dr Paul Johnson Practice, Cork'), 'Contact Name' (filled with 'Doctor Paul Johnson'), 'Contact Number' (filled with '018000000'), and 'Contact Email' (filled with 'drpauljohnson@socrates.ie'). At the bottom right, there are 'OK' and 'Cancel' buttons.

Complete the Billink registration form to sign up with Billink. Confirm you are a partner in the practice and you have the Practice bank account details ready to begin.



The screenshot shows the 'Billink Management' onboarding screen. The header is blue with the Billink logo and the text 'Billink Management'. The left sidebar is dark blue with the Billink logo and the text 'Billink payments'. The sidebar has four items: 'Summary' (selected), 'Practice Details', 'Your Details', and 'Bank Details'. The main content area is white and contains the following text: 'Welcome to Billink Onboarding', 'Onboarding should take less than 3mins! Confirm the check boxes below and click 'Start Now' to begin.', 'To complete the initial setup and activation of your Billink account please confirm that:', two checked checkboxes ('You are a partner in your practice' and 'You know your practice bank account name and IBAN'), and a light blue information box: 'If any additional information is required, we will contact you after onboarding is complete'. At the bottom, there is a grey bar with the text 'You have to confirm that you meet all two requirements listed to move forward' and a blue 'Start Now' button.

Enter the required details and click **Next Step**.

The screenshot shows the 'Your Practice/Business Type' form. On the left is a dark sidebar with the 'Billink payments' logo and a navigation menu with four items: 'Summary' (checked with a green circle), 'Practice Details' (selected with a blue circle), 'Your Details', and 'Bank Details'. The main content area has a blue header 'Billink Management'. Below the header, the form title is 'Your Practice/Business Type'. The form contains the following fields: 'Business Type' with radio buttons for 'Partnership' and 'Sole Trader'; 'Practice Name' with a text input field; 'Practice Address' with two stacked text input fields for 'Practice Address1' and 'Practice Address2'; 'County' and 'Ireland' with dropdown menus, and 'Eircode' with a text input field; 'Practice Phone Number' with a text input field; 'Practice Email' with a text input field; and 'Practice Website?' with radio buttons for 'Yes' and 'No'. At the bottom, there are 'Go Back' and 'Next Step' buttons.

Enter the required details and click **Next Step**.

The screenshot shows the 'Your Details' form. The sidebar is identical to the previous form, but 'Your Details' is now selected with a blue circle. The main content area has a blue header 'Billink Management'. Below the header, the form title is 'Your Details' with a sub-note: '(As the Practice Partner/Owner activating this account we require this information for security and verification purposes.)'. The form contains the following fields: 'Your First Name' with a text input field; 'Your Last Name' with a text input field; 'Your Date of Birth' with a text input field containing the placeholder 'DD/MM/YYYY'; 'Your Home Address' with a sub-note '(A regulatory requirement for 1 partner/owner to provide)' and two stacked text input fields for 'Address1' and 'Address2'; 'County' and 'Ireland' with dropdown menus, and 'Eircode' with a text input field; 'Your Email Address' with a text input field; and 'Your mobile phone number' with a text input field. At the bottom, there are 'Go Back' and 'Next Step' buttons.

If you chose Partner then you will need to fill out details of all partners.

The screenshot shows the 'Names of Other Partners' section of the Billink Management interface. On the left is a dark sidebar with the Billink payments logo and a navigation menu with five items: 'Summary' (checked), 'Practice Details' (checked), 'Your Details' (checked), 'Partner Details' (selected with a blue dot), and 'Bank Details' (unchecked). The main content area has a blue header 'Billink Management'. Below it, the title 'Names of Other Partners' is followed by the instruction 'Please add the names of your other partners (First Name, Last Name is sufficient)'. There are two input fields for 'First Name' and 'Last Name' with an 'Add Partner' button to the right. Below this is a table with columns 'Partner', 'First Name', and 'Last Name'. The first row contains the number '1', the text 'test', and the text 'test'. At the bottom of the form are 'Go Back' and 'Next Step' buttons.

Read the Terms & Conditions and confirm if you agree, enter your bank account details and click Finish & Submit.

The screenshot shows the 'Practice Bank Account Details' section of the Billink Management interface. The sidebar is identical to the previous screenshot, but 'Bank Details' is now selected. The main content area has a blue header 'Billink Management'. Below it, the title 'Practice Bank Account Details' is followed by the instruction '(This is the account payments will be transferred to when complete)'. There are two input fields: 'Bank Account Name' with the placeholder 'Account Name' and 'IBAN' with the placeholder 'IBAN'. Below these is a 'Terms & Conditions' section with a checkbox and the text 'I've read and accepted [Terms & Conditions](#)'. At the bottom of the form are 'Go Back' and 'Finish & Submit' buttons.

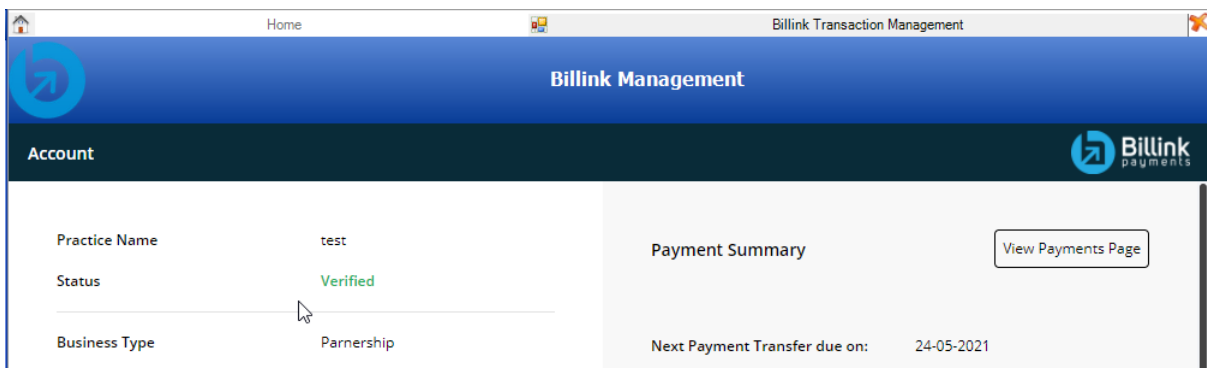
Once the Billink registration is complete you will receive a confirmation message. Clicking **Go to Dashboard** will open the Billink Portal.



Onboarding Successfully Completed

Go to Dashboard

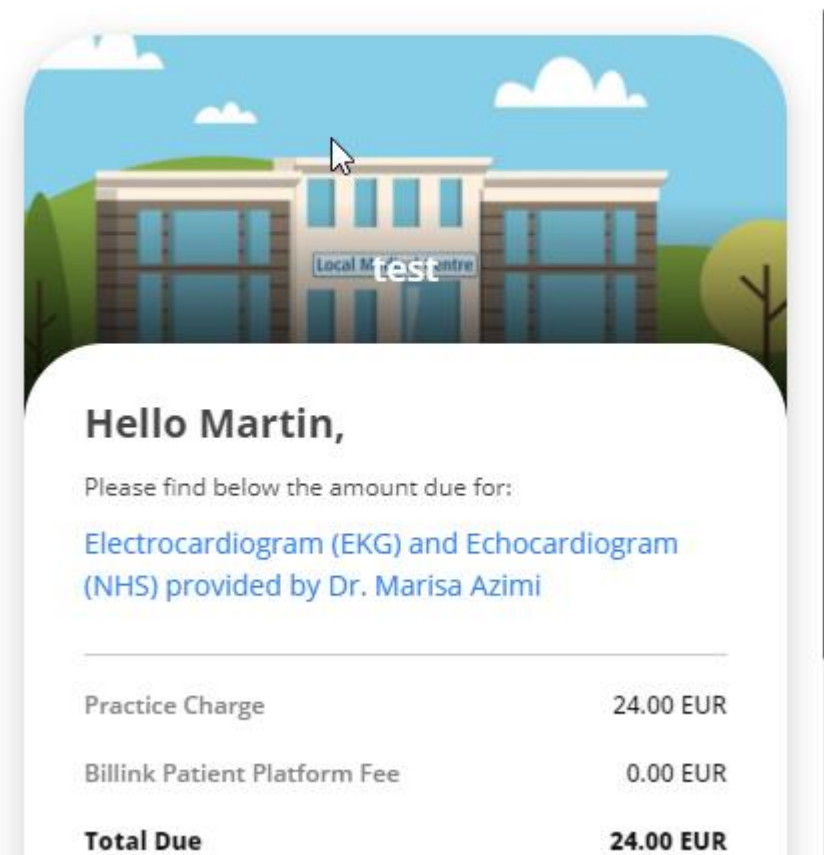
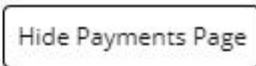
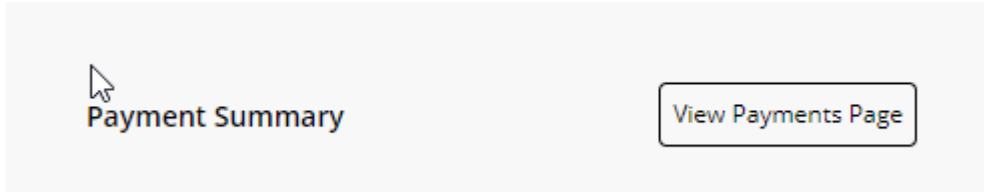
Here you will see all the information you have added during the Billink registration process.



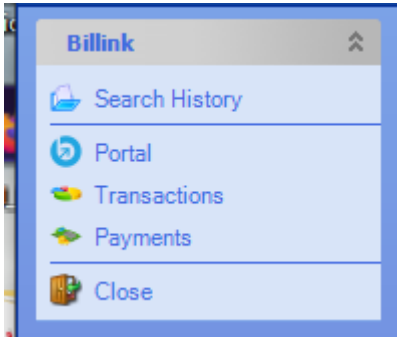
You can add your own **Practice Image** and when you send a payment request to a patient, your image will appear at the top of the request. Click X to remove the template image and drag and drop your new image.



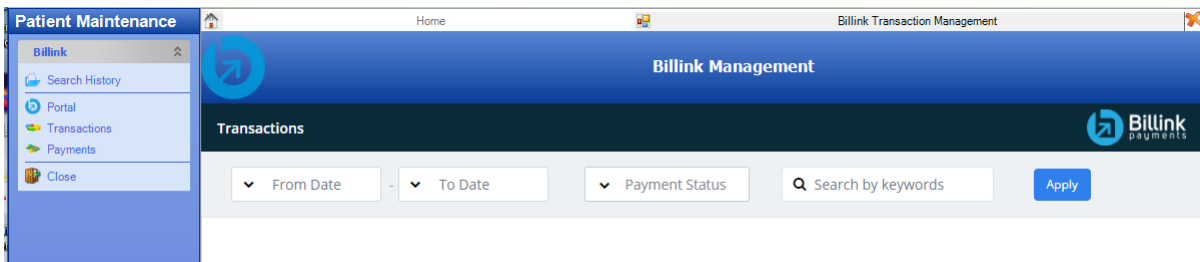
Click View Payments Page to view a preview of how the payment request link will look for the patient.



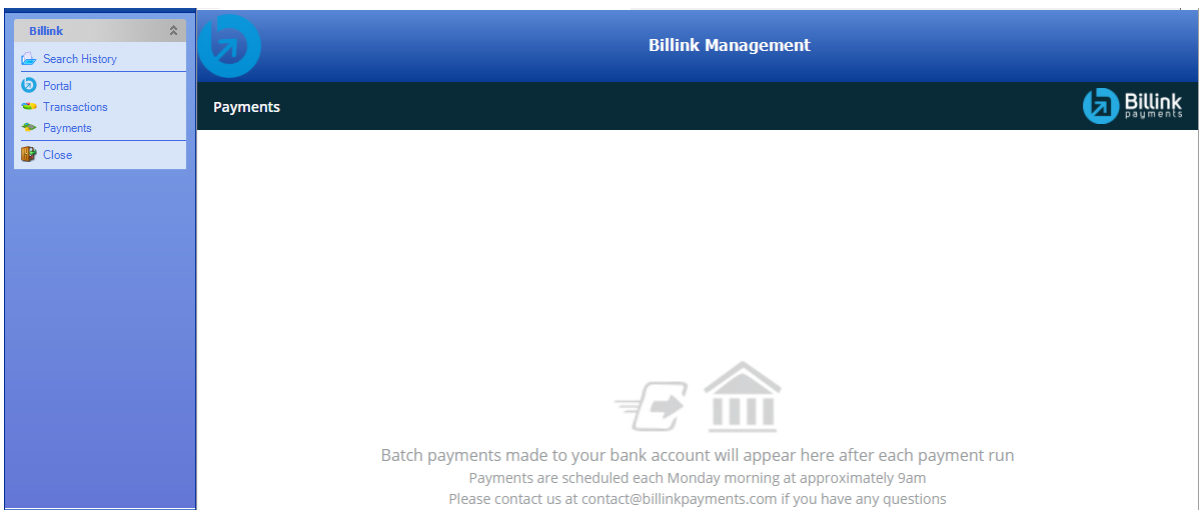
You can open the Billink Portal at any time by using the left hand explorer menu.



Billink Transactions will show all Billink payment transactions you have requested from Socrates and their status.

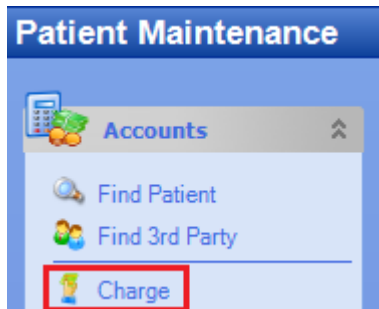


Billink Payments will show all batch payments made from Billink into the bank account entered at Billink registration.

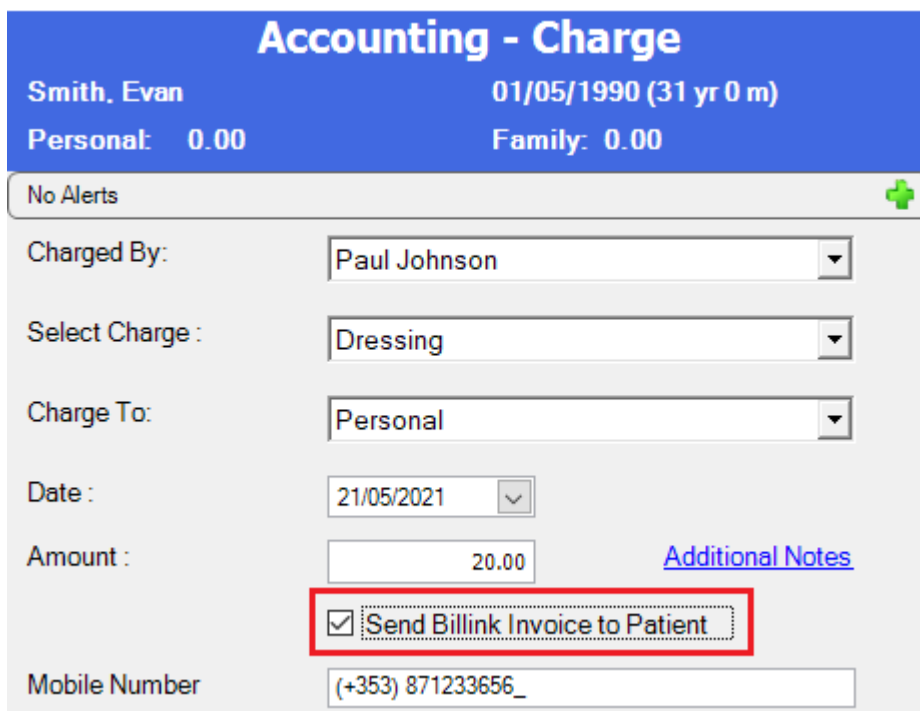


Payment Request

Select a patient from the waiting room or open the patients account and click **Charge** to send a Billink payment request.



Enter the details of the charge and check 'Send Billink Invoice to Patient'. Ensure patients mobile number is correct and click Save & Close.

A screenshot of the 'Accounting - Charge' form. The form has a blue header with the title 'Accounting - Charge'. Below the header, the patient's name 'Smith, Evan' and date of birth '01/05/1990 (31 yr 0 m)' are displayed. Below this, the 'Personal' and 'Family' charges are both listed as '0.00'. A 'No Alerts' message is shown with a green plus icon. The form contains several fields: 'Charged By:' with a dropdown menu showing 'Paul Johnson'; 'Select Charge:' with a dropdown menu showing 'Dressing'; 'Charge To:' with a dropdown menu showing 'Personal'; 'Date:' with a dropdown menu showing '21/05/2021'; 'Amount:' with a text input field containing '20.00' and a link for 'Additional Notes'; a checkbox labeled 'Send Billink Invoice to Patient' which is checked and highlighted with a red rectangular box; and 'Mobile Number' with a text input field containing '(+353) 871233656_'. A green plus icon is visible in the top right corner of the form area.

Any additional notes added will be sent with the Billink Payment request to a maximum of 300 characters (which will include the charge description).

Note: If you have 'Make Payment' checked by default preference selected then you need to uncheck 'Make Payment' on the Charge window for Billink to be enabled.

Accounting - Charge

Smith, Evan 01/05/1990 (31 yr 1 m)
Personal: 0.00 Family: 0.00

No Alerts

Charged By:

Select Charge:

Charge To:

Date:

Amount: [Additional Notes](#)

Billink Send Billink Invoice to Patient

Make Payment

Payment Type:

Payment:

Receipt: [Additional Notes](#)

Outstanding Charge(s) / Multiple Charges

If the patient has an existing outstanding charge or you want to request payment for multiple charges then open the Patient Account.

Filter dropdown to **Outstanding** to view all outstanding charges.

Name: Evan Smith
Type: Private Age: 31 y
Status: Active PPSN:

No Alerts

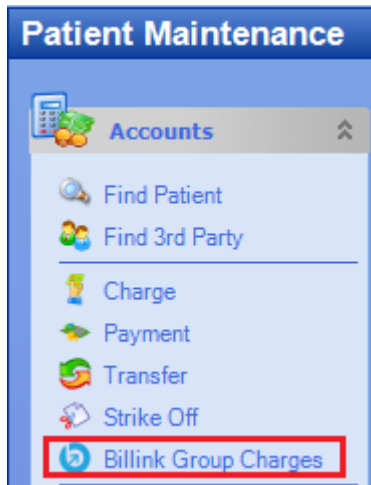
Insurance None

Account

View

Select the outstanding charge(s) from the patients account and click 'Billink Group Charges' from the left hand menu.

Select the outstanding charge(s) that you want to request payment for and click **Billink Group Charge**.



Ensure the patients mobile number is correct and click **Save**.

The screenshot shows a patient account page for Evan Smith. The patient's details are: Name: Evan Smith, Type: Private, Status: Active, Age: 31 yr 0 m, PPSN: [redacted], Unique #: 0000070, Personal: €70.00, Family: €0.00. The account is set to 'Personal' and 'Outstanding'. A table of charges is visible, with the following data:

ID	Date	Charge
500	01/03/2021	Dressing
502	27/04/2021	Blood Test
501	01/05/2021	Ear Syringe

The 'Outstanding' section is expanded. A 'Billink Payment Request' dialog box is open, showing the patient's name (Evan Smith) and contact number (+353) 871233656. The dialog box also displays a table of charges with their total amount:

Date	Charge	Outstanding
01/03/2021	Dressing	20.00
27/04/2021	Blood Test	20.00
01/05/2021	Ear Syringe	30.00

The dialog box has 'Save' and 'Cancel' buttons at the bottom.

Search History

To view the status of all payment requests select **Billink** icon from main menu or **Accounts > Billink Management**.

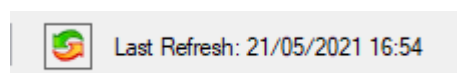
Search History is loaded by default.

The screenshot shows the 'Billink Management' interface. On the left is a sidebar menu with options: Billink (selected), Search History, Portal, Transactions, Payments, and Close. Below this are other menu items: Appointments, Waiting Room, Patient Maintenance (highlighted), Consultation, Reports, Communication, and My Control Panel. The main area displays a table of transactions with filters for 'From' (01/04/2021), 'To' (21/05/2021), and 'Status' (Sent). The table has columns for Date, Patient, DOB, Mobile, Description, Amount, and Sent By. Two transactions are listed: one for Evan Smith (70.00) and one for Robert Avalos (45.00). At the bottom, there is a search bar for patients and a 'Synchronize Payments' button.

Date	Patient	DOB	Mobile	Description	Amount	Sent By
21/05/2021	Smith, Evan	01/05/1990	353871233656	Invoice 21/05/2021	70.00	Paul Johnson
18/05/2021	Avalos, Robert	19/08/1963	087900000000	Consultation Charge	45.00	Paul Johnson

Use filters to view transactions by status.

- **Sent** – Payment request sent via Billink to Patient.
- **Paid** - Payment request sent via Billink has been paid by the Patient.
- **Cancelled** – Payment request sent via Billink has been cancelled. If Patient clicks the link in the sms message, they will be advised the request has been cancelled.
- **Refunded** – Payment request sent via Billink has been paid by the Patient and the Practice has subsequently refunded the payment on the Billink Portal.



Click Refresh button to show any new payment requests added in Socrates.


Click **Synchronize Payments** button to update the list with any recent Billink payments, refunds or cancellations. A check is completed for any Billink updates when the Billink window is opened.

X	Search for Patient	0 Matches Found
		Synchronize Payments

When payments are added to the patients chart, **Taken by** will be the user who opened the Billink window / clicked Synchronize Payment button and pulled down the transaction status from Billink.

Billink Portal

Click the arrow beside the Payment request to view further details on the Billink portal or to update the Billink request.

Date	Patient	DOB	Mobile	Description	Amount	Sent By	
21/05/2021	Smith, Evan	01/05/1990	353871233656	Invoice 21/05/2021	70.00	Paul Johnson	

Click **Resend** to resend the text message to the patient e.g. if the link has expired.

Billink Management

←
Billink payments

Transaction Details for ID 63af93cc-cf10-4405-a43c-a078b66d3686

ID	63af93cc-cf10-4405-a43c-a078b66d3686	HCP	Paul Johnson
Patient Name	Evan Smith	Payment Date	21-05-2021 15:35:28
Mobile Phone	353871233656	Sent By	Paul Johnson
Practice Charge	€70.00	Payment Status	Sent
Patient Transaction Fee	€0.00	Cancel Resend	
Total Charge	€70.00		

SMS From	Log	Description
SligoQAPrac	21-05-2021 14:35:29	Initial Request

Should you need to cancel the payment request for any reason e.g. an incorrect mobile number was used or if the patient has paid for the bill in person then click **Cancel** to remove the payment request.

Once you click **Synchronise** on the Search History window or reopen the Billink window the status of the request will update.

Patients Account

Once the payment has been received by Billink it will be automatically allocated to the outstanding charge. The payment description will be 'Online Payment'.

ID	Date	Description	Taken By	Debit	Credit	Balance
506	01/03/2021	Dressing	Paul Johnson	€20.00		€20.00
502	27/04/2021	Blood Test	Paul Johnson	€20.00		€40.00
501	01/05/2021	Ear Syringe	Paul Johnson	€30.00		€70.00
504	24/05/2021	Online Payment	Paul Johnson		€20.00	€50.00
505	24/05/2021	Online Payment	Paul Johnson		€30.00	€20.00
507	24/05/2021	Online Payment	Paul Johnson		€20.00	€0.00
Outstanding						0.00

No updates will be made to the patients account if the Billink payment request has been cancelled or refunded. You must update the patients account as required.

Patient

Once the patient receives the text message, they can click on the link provided. This link will open the payment page in their default browser. They can enter their card details and click **Pay**.

Hello Robert Avalos,

Please find below the amount due for:

Consultation Charge

Service provided by: Paul Johnson


Practice Charge	€45.00
Other fees if applicable	€0.00
Total Due	€45.00

If you have any questions or concerns about this payment please do not hesitate to contact us directly by phoning the practice on [+353187999994](tel:+353187999994)

Kind Regards,
Paul Johnson

I agree to [Terms & Conditions](#)

PAY €45.00

Payment through  Billink