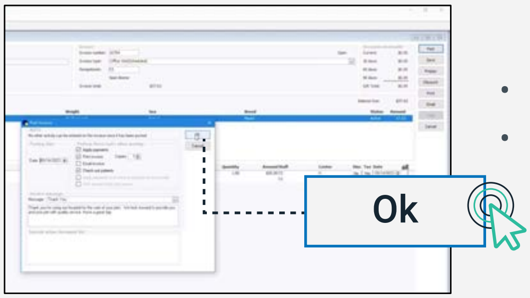
IDEXX Veterinary Software

CareCredit Integration within Cornerstone 9.5

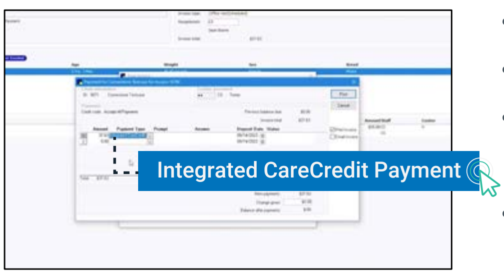
Taking A CareCredit Payment While Posting an Invoice

01.



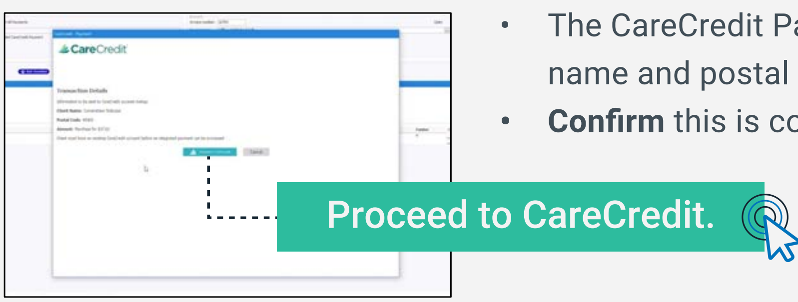
- Select **Post** at the top of the invoice.
- Click **OK** to apply the payment.

02.



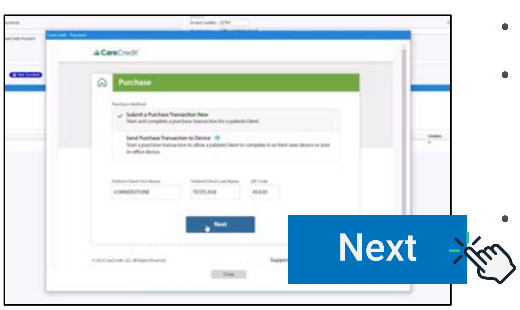
- The payment window will appear.
- If required, **enter** the cashier password. Press **Tab.**
- In the Amount field, manually **enter** a specific amount or right click and **select** Invoice Balance. Press **Tab.**
- In the Payment Type, choose **Integrated CareCredit Payment.** Press **Tab.**

03.



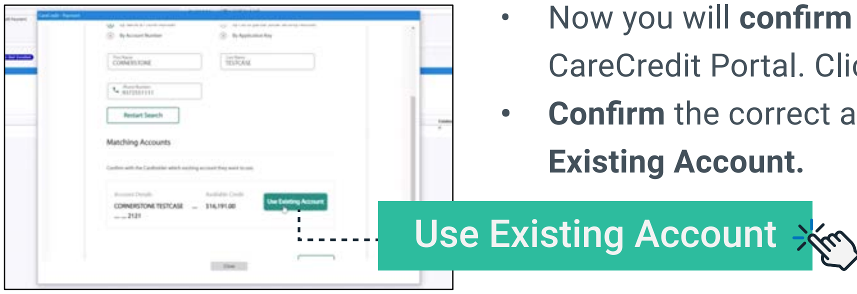
- The CareCredit Payment window will appear, with the client's name and postal code and the transaction amount.
- **Confirm** this is correct, then click **Proceed to CareCredit.**

04.



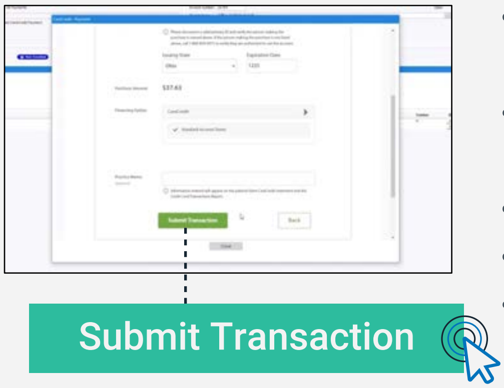
- The CareCredit Portal will appear.
- Here **choose** between submitting the purchase transaction now or sending the purchase transaction to a device to allow the client to complete the payment on their own.
- Click **Next.**

05.



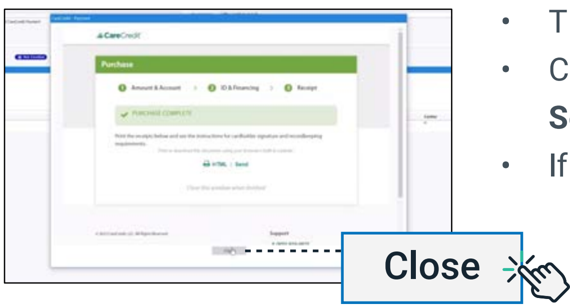
- Now you will **confirm** the client's account within the CareCredit Portal. Click **Search.**
- **Confirm** the correct amount with the client, then click **Use Existing Account.**

06.



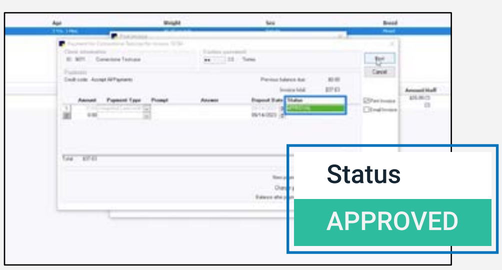
- **Select** the identification type the client will be providing to verify that the account.
- In the Financing Option field, click **CareCredit** to view the financing options specific to your practice's merchant account.
- **Select** the financing option of your choice.
- **Add** a practice memo if desired.
- Then click **Submit Transaction.**

07.



- The purchase has been completed.
- Click the **HTML** option to print a physical receipt **or** click **Send** to deliver a receipt by text or email.
- If the client does not want a receipt, click **Close.**

08.



- The payment window in Cornerstone now indicates that CareCredit approved the payment.
- To finish, click **Post** on the payment window.