Bank Of Ireland Payment Acceptance (BOIPA)

Bank of Ireland Payment Acceptance (BOIPA) has been integrated into Socrates to allow users take Card payments using the Card Terminal 'Lane 5000' from within Socrates. **Contact Bank of Ireland for details of how to sign up or** https://www.boipa.com/clanwilliam-socrates/

Once the Bank Of Ireland engineer completes the installation of the Card Terminal and associated BOIPA Link software, the BOIPA Device preference must be enabled in Socrates.

Note: Requires Socrates version 2.7.1 or later.

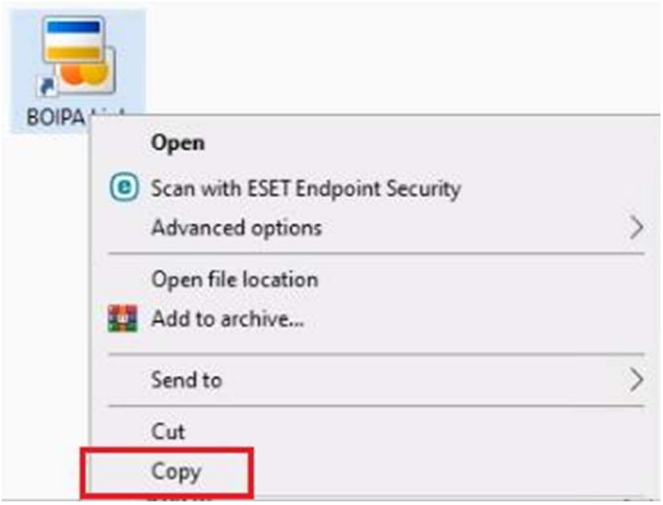
Contents

Setup 2
Add BOIPA Link to Windows Startup 2
Socrates Setup 3
How to use the BOIPA Card Terminal in Socrates 5
Card Transaction 5
Cancel Card Transaction 8
Card Refund 9
Close Batch – Daily Task 11
Find Transaction 14
Troubleshooting 14

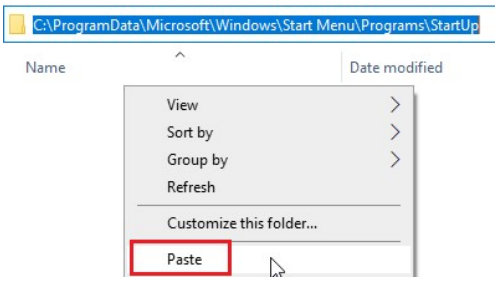
Setup

Add BOIPA Link to Windows Startup

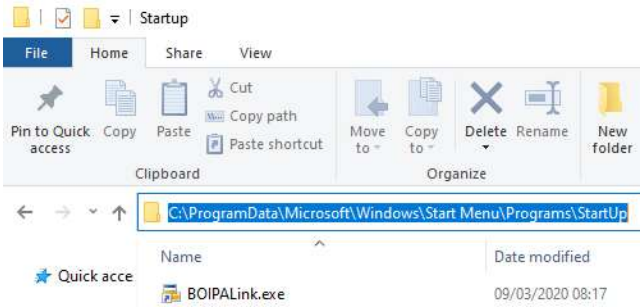
In order to ensure BOIPA is running when your computer starts you need to add it to your computers Startup. To set this up, right click on the BOIPA Link shortcut on your desktop and select Copy.



Open the Startup folder from Windows Explorer **C:\ProgramData\Microsoft\Windows\Start Menu\Programs\StartUp.** Right click in the folder and click paste**.**



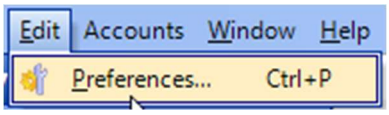
You will see the BOIPA link in the startup folder.



Socrates Setup

Enable BOIPA Device

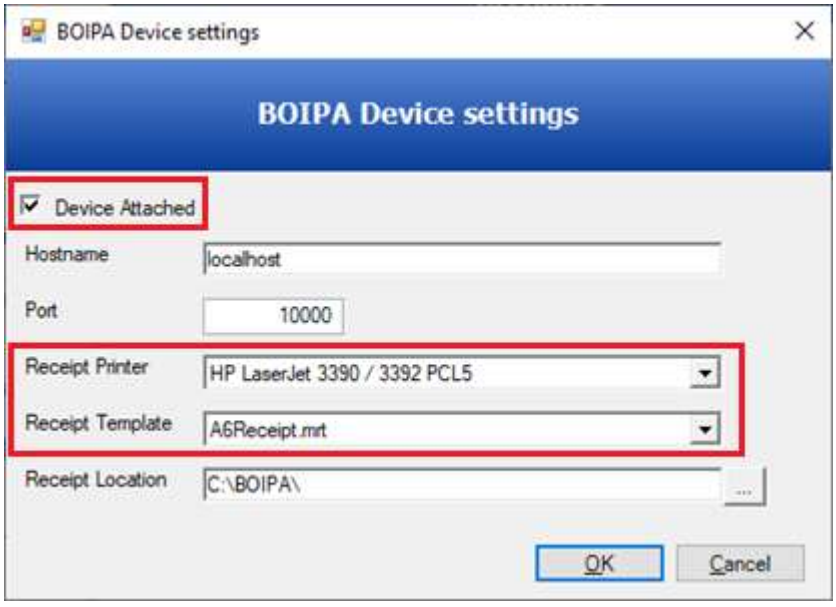
In Socrates open *Edit -> Preferences.*



In General, select the Accounts tab and click **Settings** for BOIPA Device.

Select checkbox to confirm device is attached.

Select the **Receipt Printer** for Card receipts and select the **Receipt Template**.

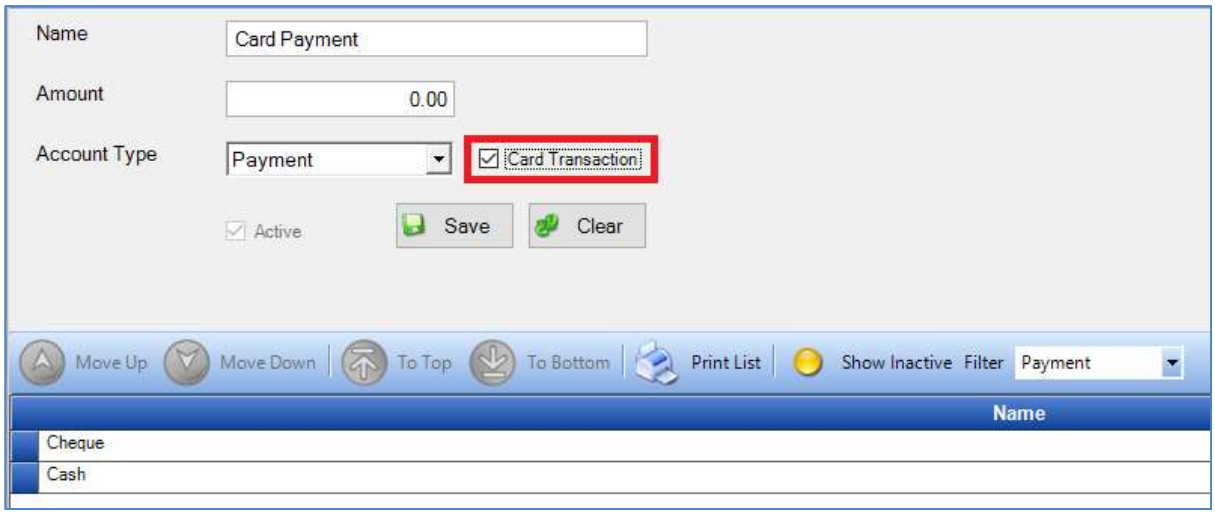


Click OK when finished.

Account Type Setup

Payment Account Type

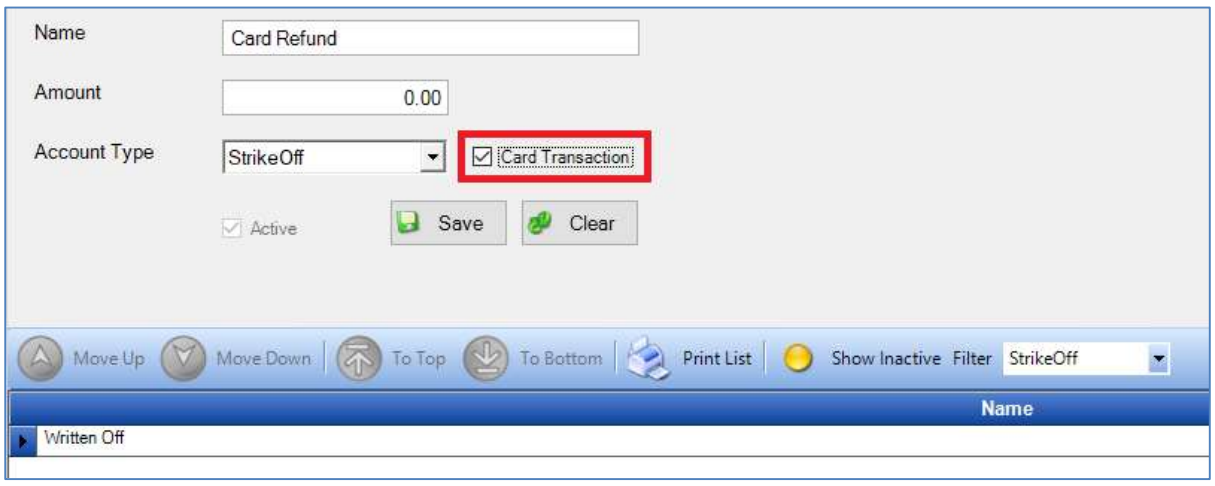
Create a Payment Account Type for Card Transactions or update an existing Account Type. Open My Control Panel > Admin Console > System Types > Account Types.



- Enter the name of the Payment Type (if creating a new type).
- Select Payment as the Account Type and select Card Transaction and click Save.

Refund/Strike Off Account Type

Create a Refund/Strike Off Account Type for Card Transactions. Open My Control Panel > Admin Console > System Types > Account Types.



- Enter the name of the Refund/Strike Off Type.
- Select StrikeOff as the Account Type and select Card Transaction and click Save.

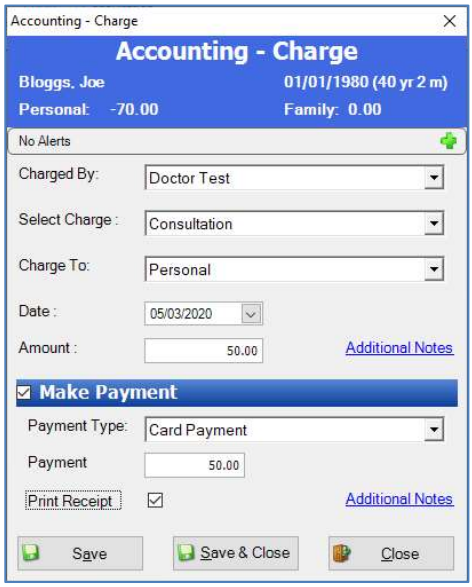
How to use the BOIPA Card Terminal in Socrates

NB: The card machine is programmed by BOIPA to automatically run a Settlement at 10.30pm every night. Therefore, every morning you must click '**Close batch**' in the BOIPA Link software before using the device. Please see the Close Batch instructions on page 11 for steps on how to do this.

Card Transaction

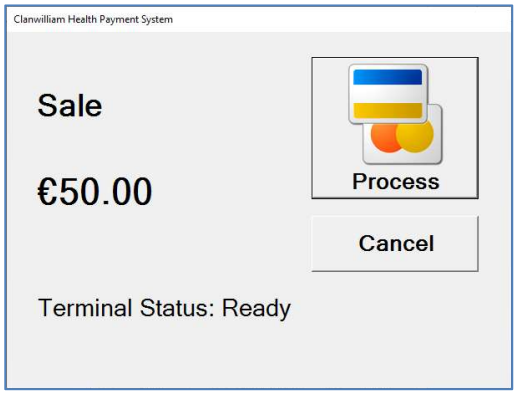
Example: Taking a Payment from Waiting Room.

Highlight Patient and click **Charge Patient** to record a charge for the patient visit.

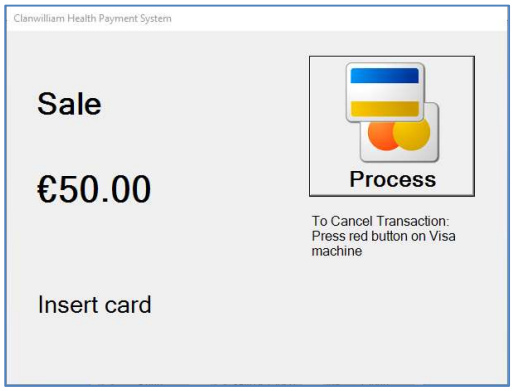


Enter the Amount and Select **Make Payment**. Select the Payment Type that has been created for Card Transactions. Select Print Receipt. Click Save and Close.

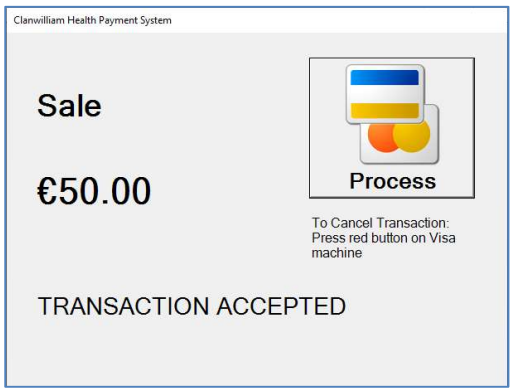
The Card Transaction window will be displayed.



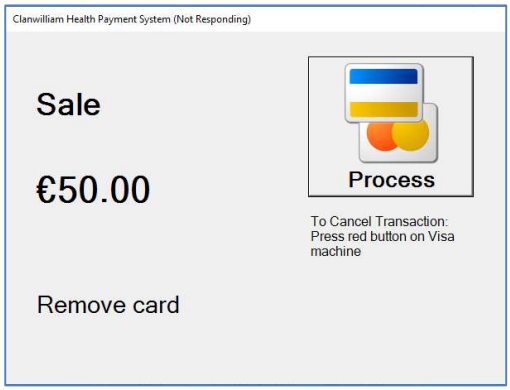
Click **Process** to proceed with the transaction.



Insert the Card and enter the PIN or Tap Card on Terminal. The Payment will be processed

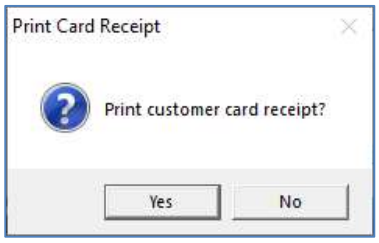


Advise customer to remove their card.



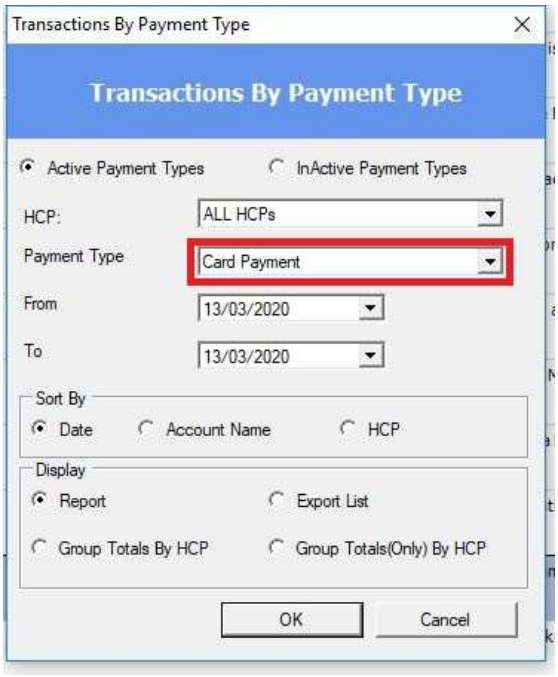
The default Socrates receipt will be printed if Print Receipt is checked on the Make Payment window.

User will be asked do they want to print a Card Receipt for the Patient. Click Yes to print the Card Receipt.



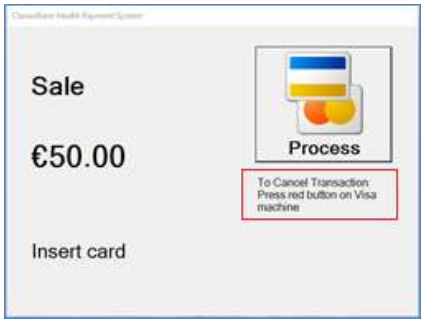
NOTE: the system will not print a 'merchant copy' of the Card Receipt – it does not have to as an end-of-day "settlement summary" can be easily obtained from Socrates Reports. All card transactions recorded in Socrates can be retrieved by running the Total Surgery Income report or Transactions by Payment report.

If you run the Transactions by Payment report, select the card payment type(s) and the report will total up all card transactions for the day. *This is a key benefit as it means you no longer have to keep a physical copy of each merchant receipt throughout the day – the system handles all of this for you.*



Cancel Card Transaction

If for any reason you want to cancel the Card Transaction from the Insert Card window e.g. an incorrect amount was entered then press the red button on the terminal.

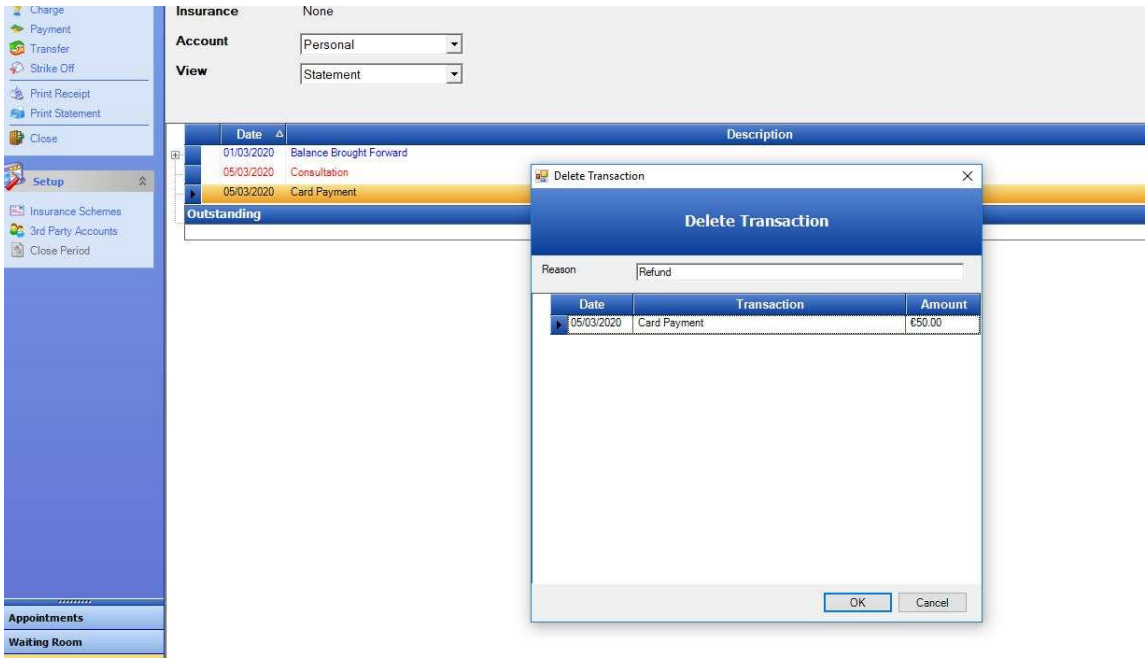


Transaction will be cancelled and the following message will be displayed.

Click OK to return to the Accounting Charge window.

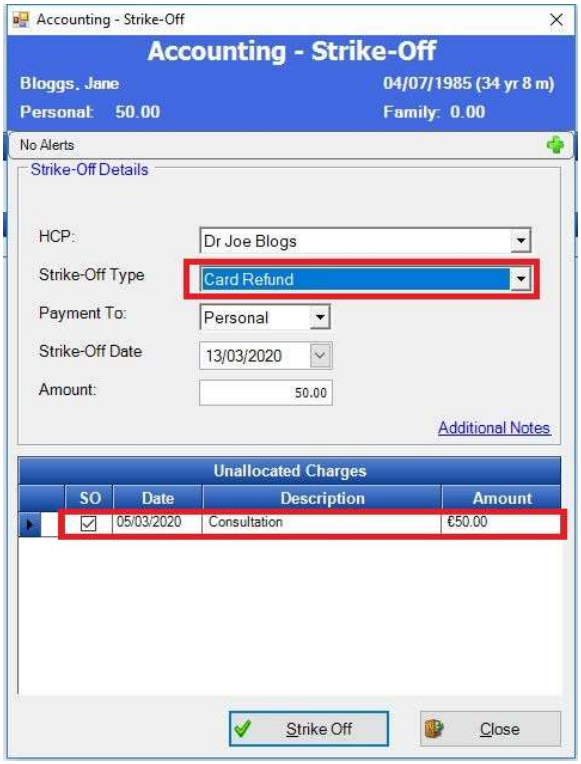
Card Refund

Highlight the payment that you want to refund and delete it by pressing the delete button on the keyboard.

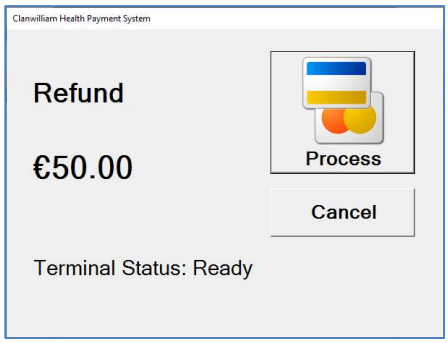


To waive the outstanding charge, select the charge and click Strike Off.

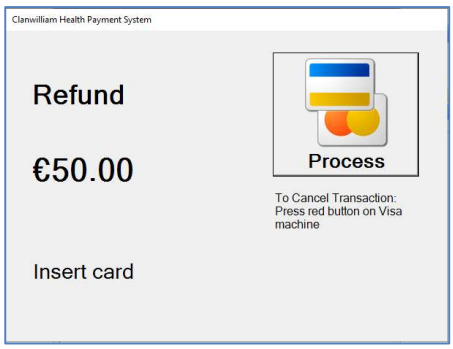
Select 'Card Refund' from the Strike-Off Type menu. This type was created in Account Type Setup above. Check the box beside the outstanding charge and click **Strike Off** button.



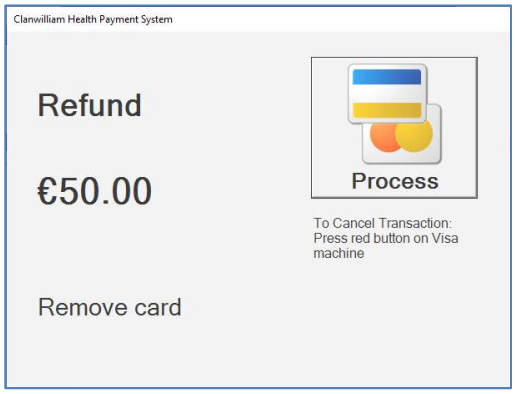
The Card Transaction window will be displayed.



Click **Process** to proceed with the refund transaction.

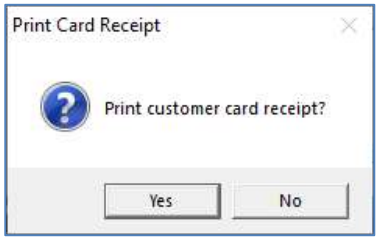


Insert the Card and request Patient to enter the PIN or Tap Card on Terminal.



The Refund will be processed.

User will be asked do they want to print a Card Receipt for the Patient. Click Yes to print the Card Receipt.



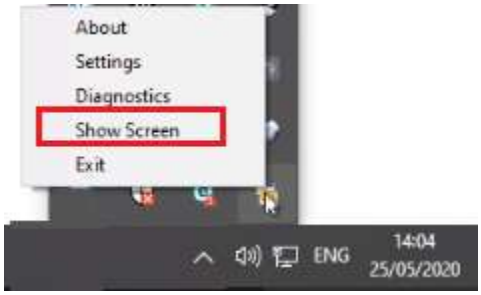
Close Batch – Daily Task

The card machine is programmed by BOIPA to automatically run a Settlement at 10.30pm every night. Therefore, every morning you must click '**Close batch**' before using the device.

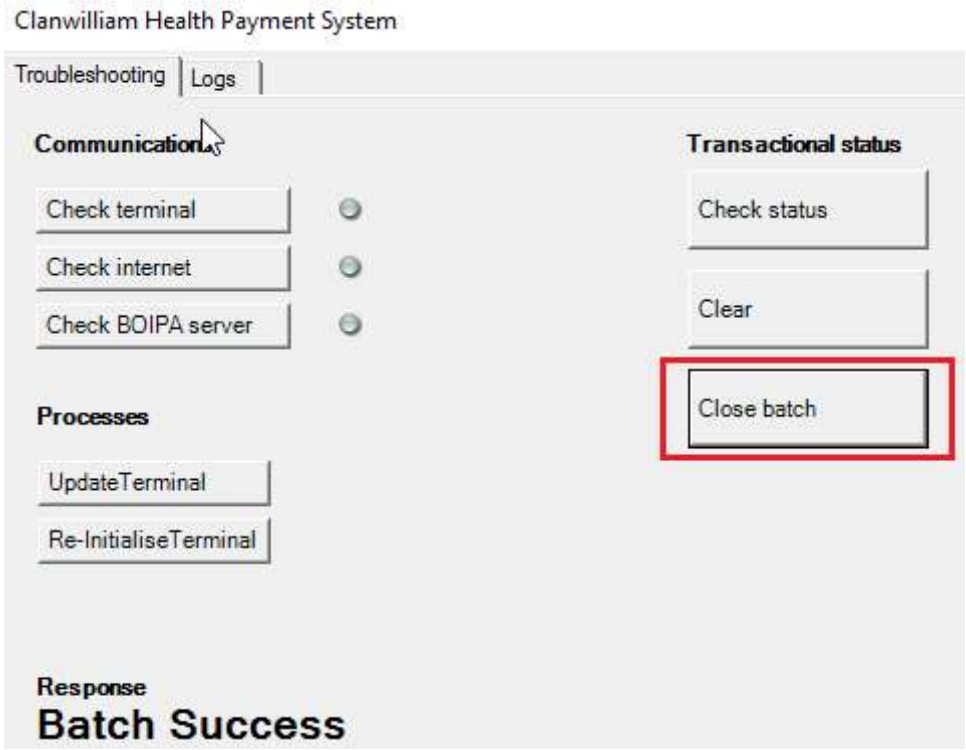
i.e. For the card machine to work with Socrates, the response message from the BOIPA Link software must say "Terminal Status: Ready". If the card machine has not been used in a couple of days (e.g. after the weekend) you may need to click the Close Batch and Check Status buttons more than once to achieve this.

Open BOIPA link in the system Tray.

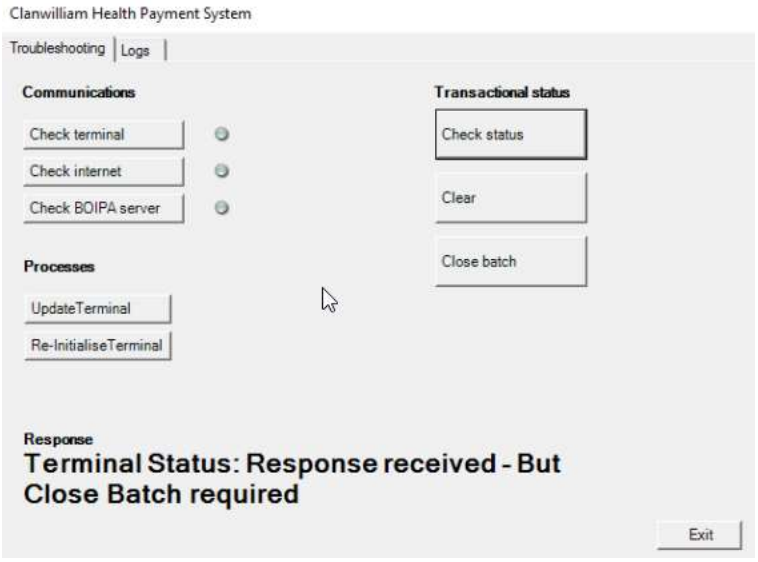
Right click on the BOIPA link and select **Show Screen**.



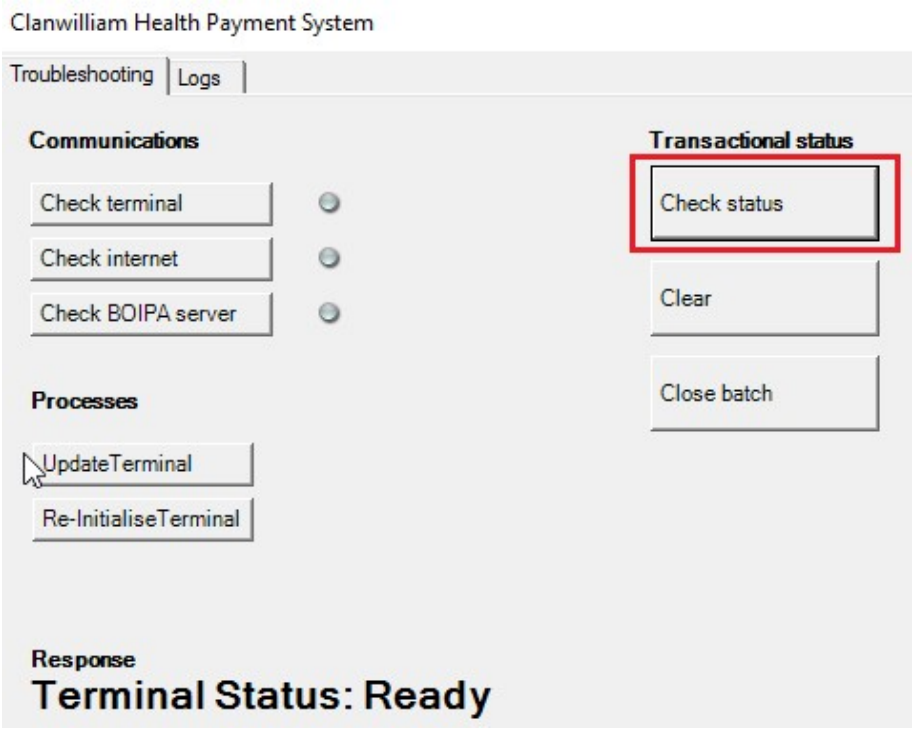
When clicking **Close Batch** a response of 'Batch Success' will be displayed.



Clicking 'Check Status' **before** closing the batch will display a response of 'Response Received but Close Batch Required'. The terminal **will not work** in this status.

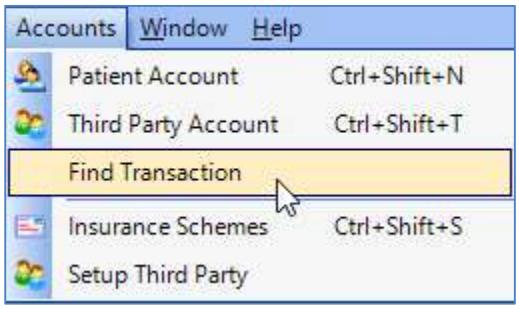


Clicking '**Check status'** after closing the batch will confirm if the BOIPA device is Ready.

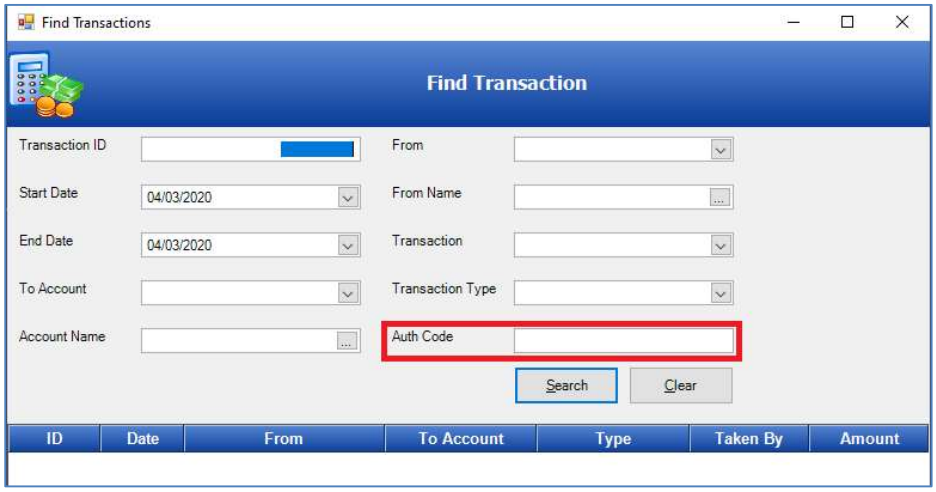


Find Transaction

To find a Transaction using the Auth Code open Accounts menu and select Find Transaction.



Enter e.g. Auth Code and click Search.



Troubleshooting

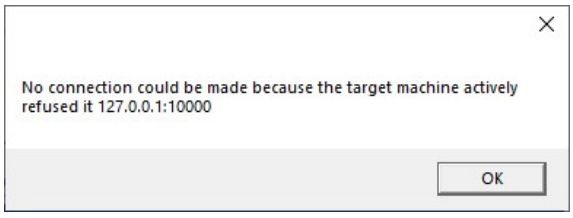
Transaction Errors

Was the **Close batch** button clicked in Clanwilliam Health Payment System? Open BOIPA link in the system Tray on your machine. Right click on the BOIPA link and select Show Screen.

Click **Check status** to confirm the Terminal is ready.

No Connection Error

When BOIPA is not running in the system tray an error will be displayed when user tries to process a payment.



Solution: Run the Boipa Link icon on the desktop.

Confirm Boipa Link is in the following folder and if not then copy it in:
C:\ProgramData\Microsoft\Windows\Start Menu\Programs\StartUp

Reprint last Card Receipt

There is no functionality to reprint customer Card receipts from Socrates.

Solution: The last Customer Card Receipt is located in a text file as follows:

- Customer Receipt = 'C:\BOIPA\customerreceipt.txt'
- Merchant Receipt = 'C:\BOIPA\mainreceipt.txt'

Error message displayed when Terminal Unplugged

If BOIPA service is running in system tray but the terminal is unplugged the following error will be displayed when a transaction tries to run.

Transaction error message displayed when clicking Process.

Solution: Check Diagnostics of Terminal. Right Click icon in system tray.