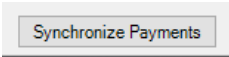


Billink Online Payment Requests

Requires Socrates Version 2.7.9 or later and 2.8.1.3 or later for Aged Debtors.

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

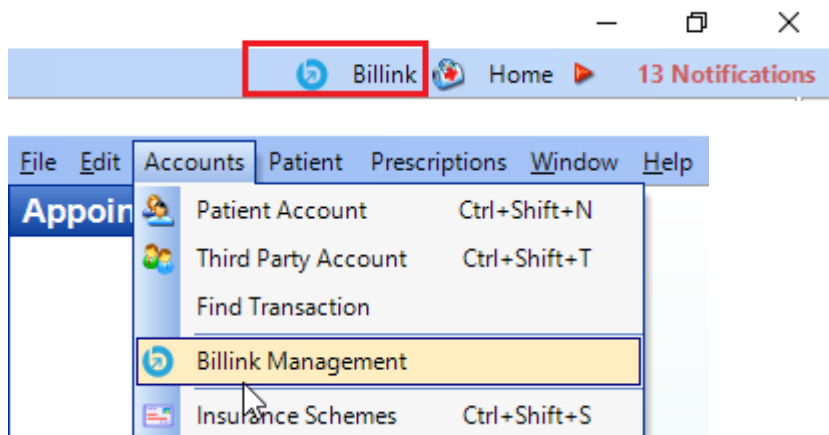
When using Billink with Socrates, **IT IS IMPORTANT TO REGULARLY SYNCHRONIZE BILLINK WITH SOCRATES.** In Billink > Search History, click the Synchronize Payments button.  This will ensure that Socrates is up to date with any Billink payments etc.

Contents

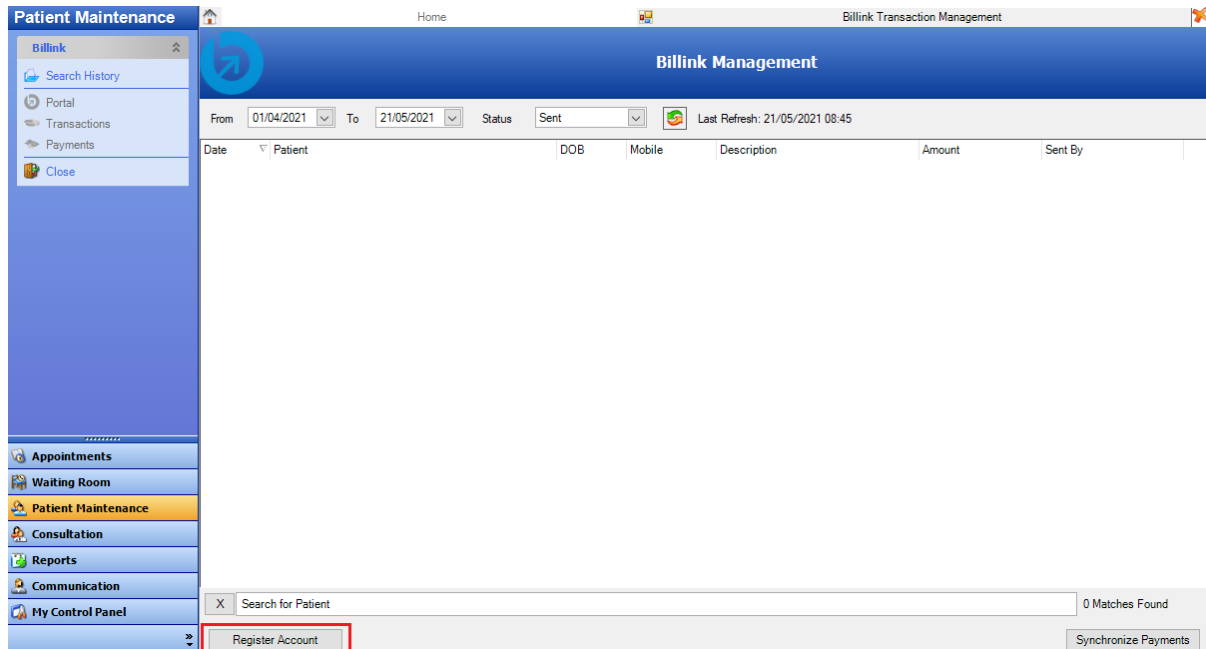
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- Payment Request 9
- Search History 12
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- Billink Portal 15
- Patients Account 16
- Patient 17

Billink Registration

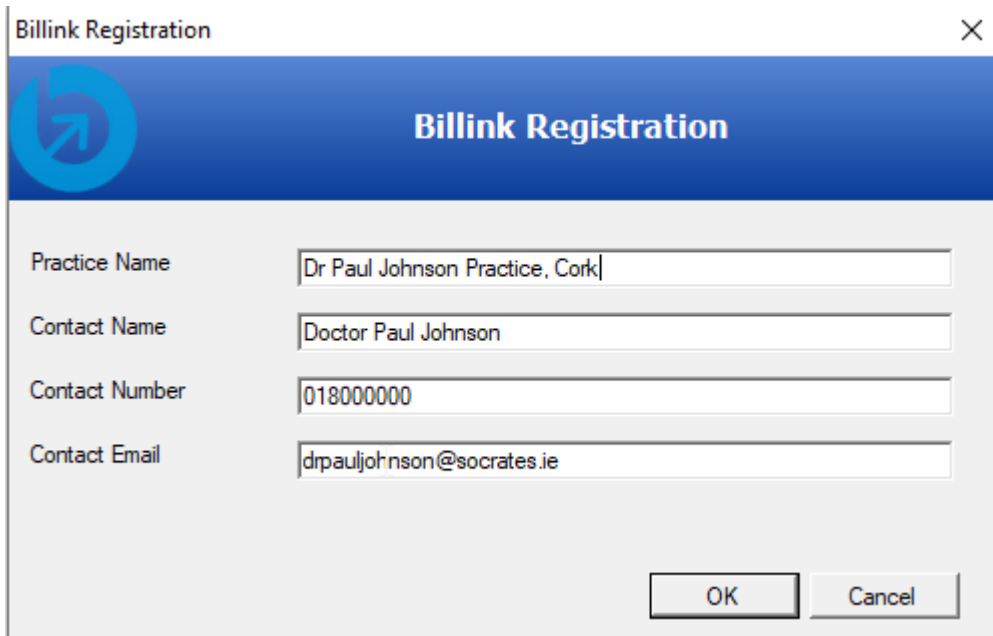
Once Billink has been enabled you will see the **Billink** button on the top menu bar and the **Billink Management** menu item in the Accounts main menu.



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

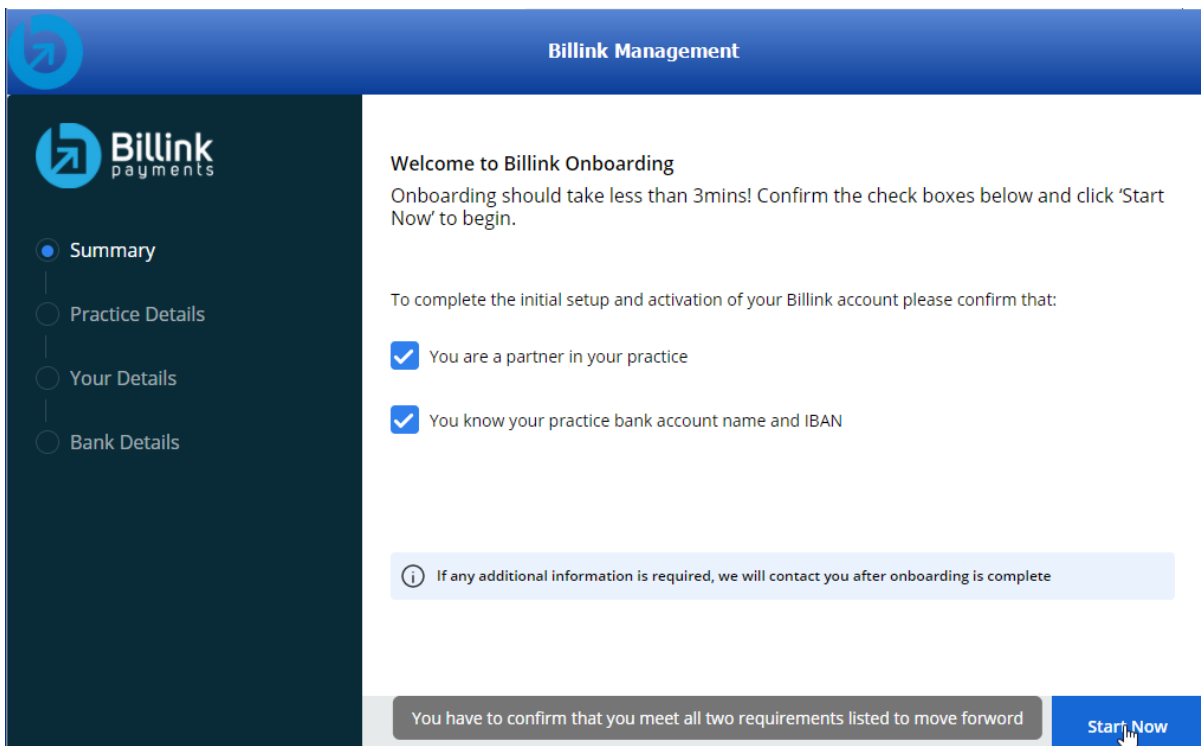


From the Billink button on the main menu, the registration screen will be displayed. Enter your Practice details and click OK.



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 text 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 two buttons: 'OK' and 'Cancel'.

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 menu 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 with labels 'You are a partner in your practice' and 'You know your practice bank account name and IBAN', an information icon and text 'If any additional information is required, we will contact you after onboarding is complete', and a footer with a grey bar containing 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 tick), 'Practice Details' (selected with a blue dot), '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 similar to the previous form, but 'Your Details' is now selected with a blue dot. 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 '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), and 'Bank Details' (unchecked). The main content area is titled 'Names of Other Partners' and includes 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', followed by an 'Add Partner' button. Below this is a table with columns 'Partner', 'First Name', and 'Last Name'. The first row contains the number '1' in the 'Partner' column and 'test' in both the 'First Name' and 'Last Name' columns. 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 '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' (checked), and 'Bank Details' (selected). The main content area is titled 'Practice Bank Account Details' and includes the instruction '(This is the account payments will be transferred to when complete)'. There are two input fields: 'Bank Account Name' with the placeholder text 'Account Name', and 'IBAN' with the placeholder text '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.

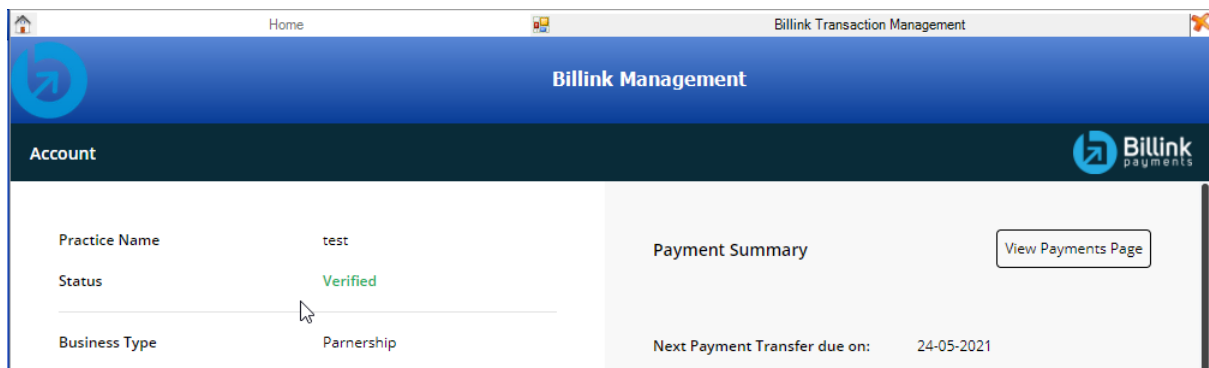
Once the Billink registration is complete you will receive a confirmation message. Clicking **Go to Dashboard** will open the Billink Portal.



Onboarding Successfully Completed

[Go to Dashboard](#)

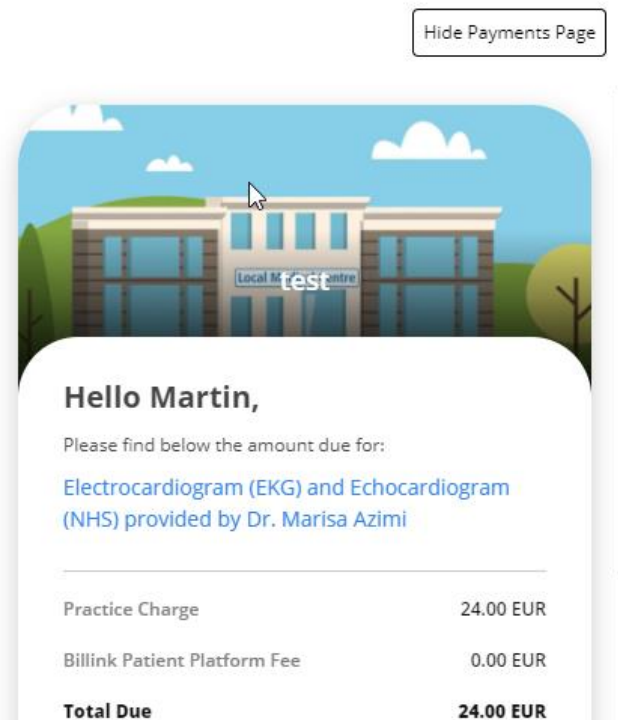
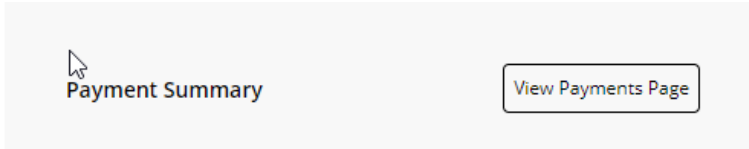
Here you will see all the information you have added during the Billink registration process.



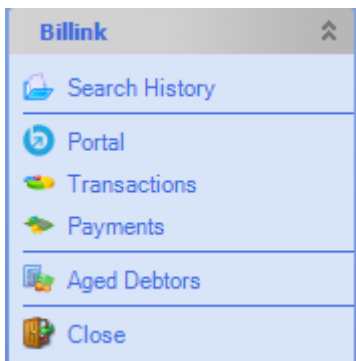
You can add your own **Practice Image** and when you send a payment request to a patient, your image will appear at the top of the request. Click X to remove the template image and drag and drop your new image.



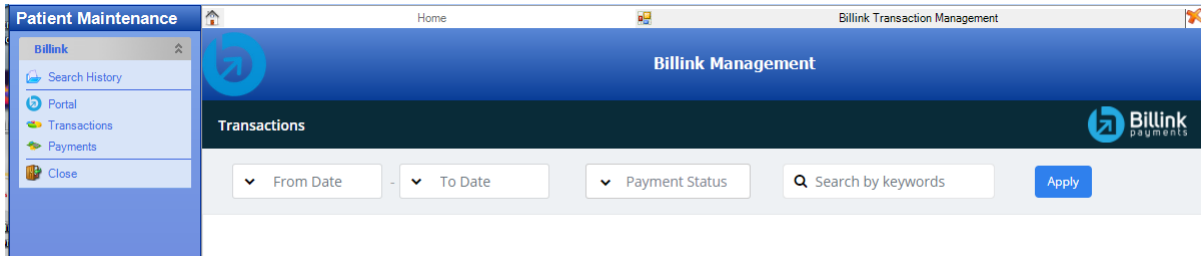
Click View Payments Page to view a preview of how the payment request link will look for the patient.



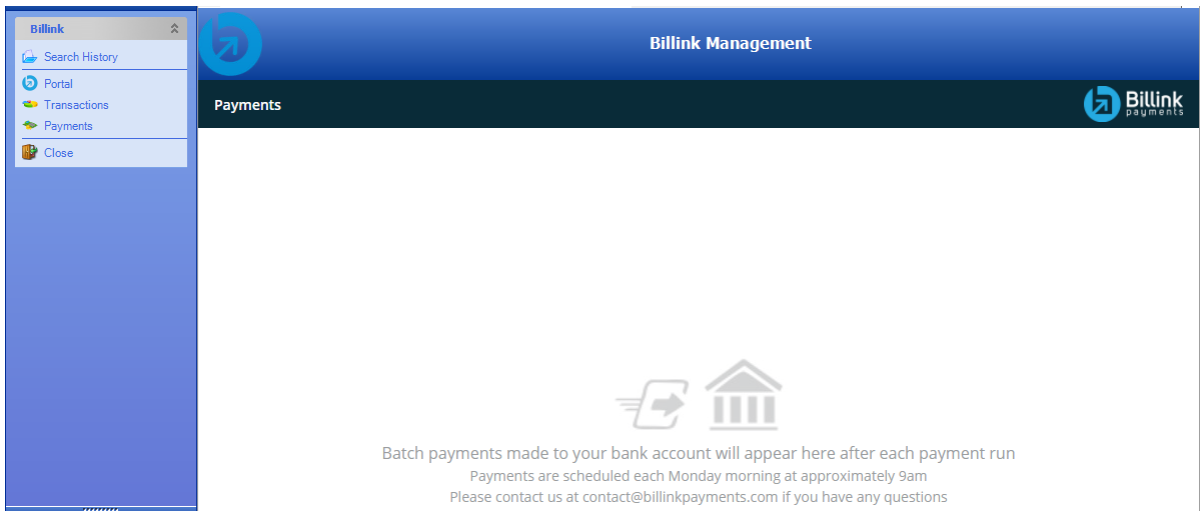
You can open the Billink Portal at any time by using the left hand explorer menu.



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

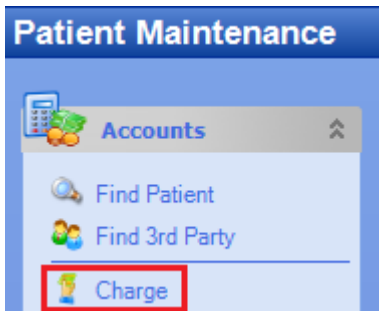


Payments will show all batch payments made from Billink into the bank account entered at Billink registration.

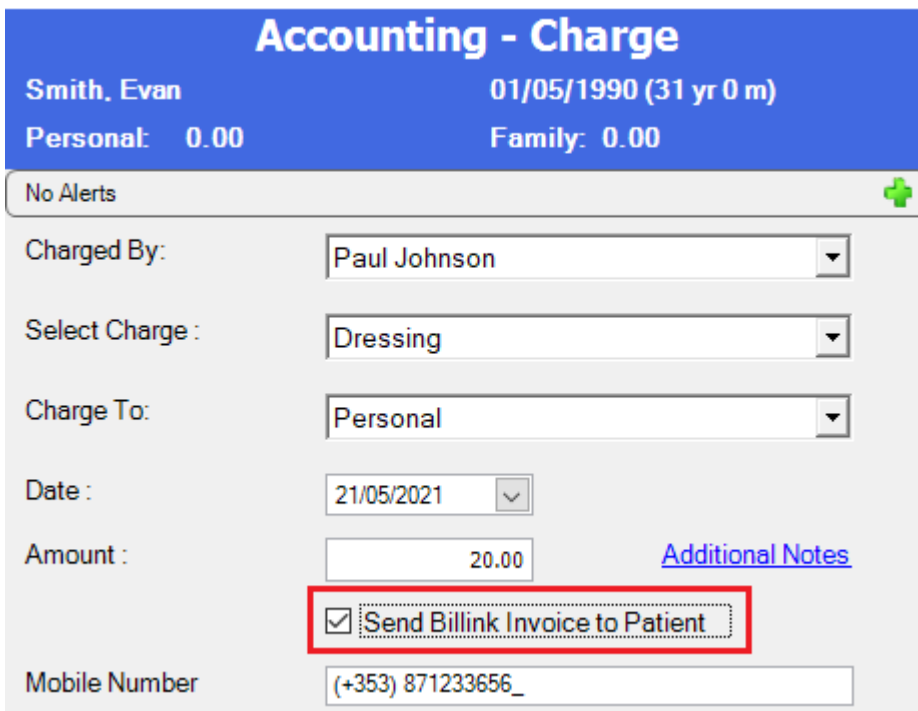


Payment Request

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 header is blue and contains the patient's name 'Smith, Evan' and date of birth '01/05/1990 (31 yr 0 m)'. Below this, it shows 'Personal: 0.00' and 'Family: 0.00'. A 'No Alerts' section with a green plus icon is visible. 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 box; and 'Mobile Number' with a text input field containing '(+353) 871233656_'. There is also a green plus icon 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:

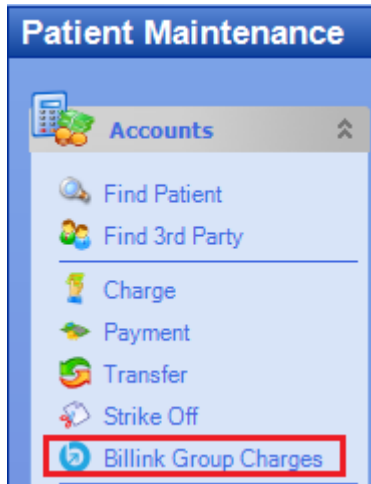
No Alerts

Insurance None

Account

View

Select the outstanding charge(s) 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 record for Evan Smith. The patient's details are: Name: Evan Smith, Unique #: 0000070, Type: Private, Age: 31 yr 0 m, Personal: €70.00, Status: Active, PPSN: [redacted], Family: €0.00. The insurance is None, and the account type is Personal. The view is set to Outstanding. A table of charges is shown below:

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, showing a "Billink Payment Request" dialog box. The dialog box contains the following information:

Patient: Evan Smith
Contact Number: (+353) 871233656
Patient Charges: Total Amount 70.00

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

Buttons for "Save" and "Cancel" are visible at the bottom of the dialog box.

Search History

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

Click **Synchronize Payments** button to update the list with any recent Billink payments, refunds or cancellations.



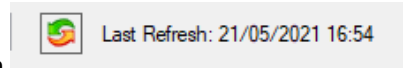
A check is completed for any updates from Billink when Billink > Search History is opened. **IT IS IMPORTANT TO REGULARLY SYNCHRONIZE BILLINK WITH SOCRATES.** A Daily Task can be created to act as a reminder. This will ensure that Socrates is up to date with any Billink payments etc.

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.

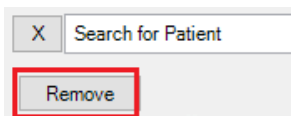
- **Settled** – A payment has been added manually to the patients account after the Billink payment request was sent. You will need to check the patient account to view the payment details.



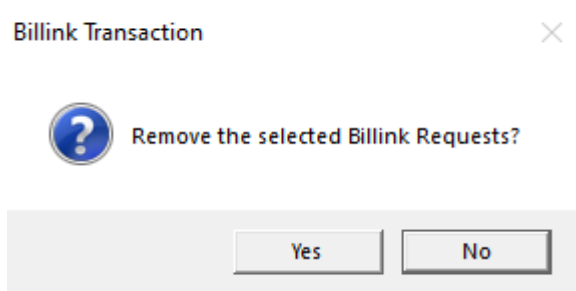
Click Refresh button to show any new payment requests added in Socrates while the Billink > Search History page has been opened.

When payments are added to the patients chart, **Taken by** will be the user who sent the Billink payment request.

If you want to cancel a Billink payment request select the charge and click the **Remove** button.

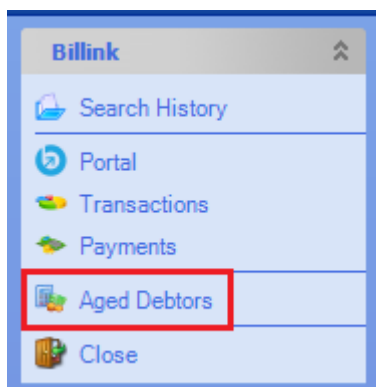


Click **Yes** to proceed.



Aged Debtors

Open Aged Debtors from the Billink menu. You will see this menu in the Search History tab if you are registered for Billink.



Click **Run** to open the Billink report and enter the criteria required. Click OK to generate a list of patients based on these criteria.

Billink Aged Debtors

Billink Aged Debtors

Account Type Personal Family

Outstanding Balance > 0

Between Dates

From 19/09/2021

To 19/10/2021

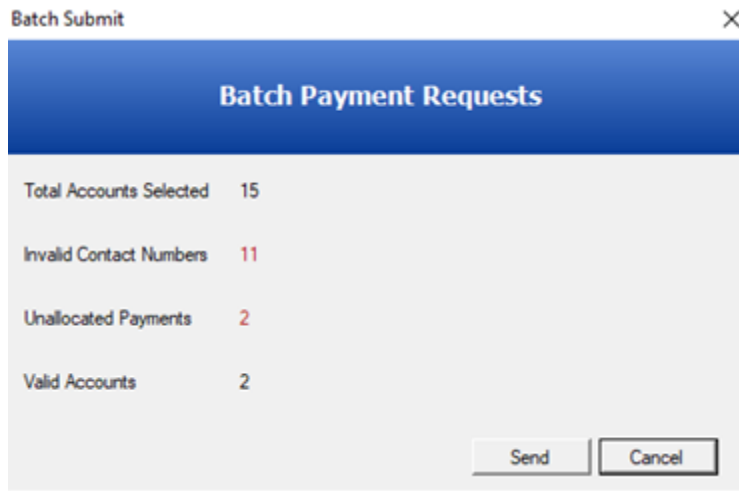
OK Cancel

A Billink payment request will only be sent for Patients with valid mobile numbers, no unallocated charges and a current outstanding balance on their account.

Note: If you select Personal, a list will be generated of all patients who have a personal balance based on the criteria selected for the report and who do not have any Billink payment requests with a status of Sent.

- Double click on a patient to open their Account to view their current outstanding balance and confirm their personal outstanding balance is correct.
- If you use between dates to generate the list and the patient has since paid this outstanding charge then this patient will be skipped and no Billink payment request will be sent.
- Select 1 or more patients from the list and click **Batch Requests** to send Billink payment requests for the outstanding charge (as returned by the Aged Debtors report).
- A notification will be displayed of those that cannot be sent a Billink payment request and the reason i.e. Patient has no mobile number or has unallocated payments on their account.

- A notification will be displayed of those that cannot be sent a Billink payment request and the reason i.e. Patient has no mobile number or has unallocated payments on their account.



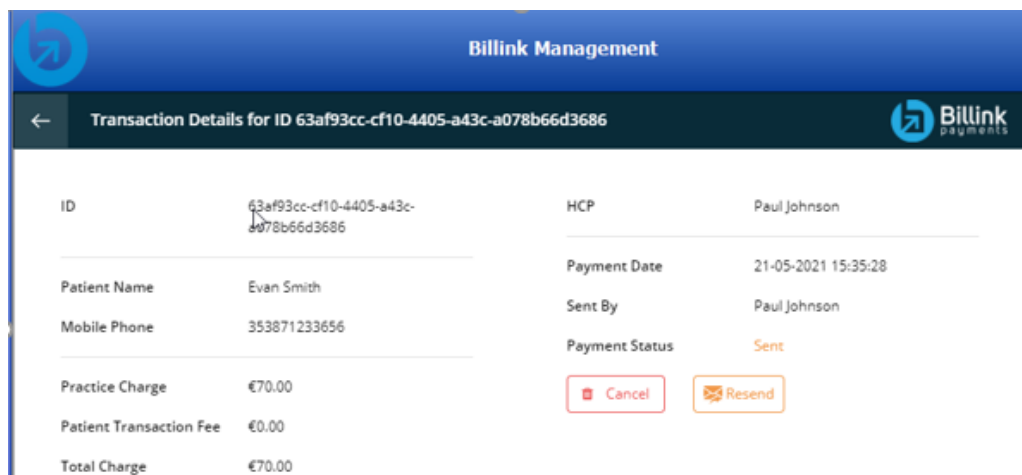
- Click **Send** and wait for requests to be sent and the window to close.
- View all Sent requests by opening Billink > Search History.
- Run the report with the same criteria again and update patients mobile number / allocate any unallocated payments to the corresponding invoice.

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.



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 Payments** on the Search History window or reopen the Billink window the status of the request will update in Socrates.

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.

If a patient has a Billink payment request and they pay the charge either over the phone or in person you should select Payment Only from Waiting Room or Payment in Accounts and allocate it against the charge. A Settled status update will be sent to Billink when any payment is made in Socrates or any payment is allocated against the charge.

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

MM / YY CVC

I agree to [Terms & Conditions](#)

PAY €45.00

Payment through  Billink