Scratch Checkout: Quick Start Guide

CORNERSTONE | SCRATCH APP

Setting up for Scratch

To use Scratch Checkout with Cornerstone, the **Scratch App** must be downloaded, logged in, and **Scratch Payment** added as a payment type. The Scratch App should be added to all workstations used to process payment.

Link to download: *https://get.scratchpay.com/app (password: puppy123)*

Payments

TERMINAL/CARD READER

- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- Under the **Terminal/Manual** tile, choose your designated card reader
- Select the **Send to Terminal** button
- Tap, insert, or swipe the card *(declined transactions can be retried immediately without leaving the Scratch App)*

MANUAL ENTRY/PHONE PAYMENTS

- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- Under the **Terminal/Manual** tile, scroll down to display **By Manual Input**
- Enter the client's payment information & click **Process**

STORED CARD

- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- Under the **Terminal/Manual** tile, scroll down to display **By Manual Input**
  - *Store a new card:* Check **Save Card Details**, select **Process**, confirm the client's email, then click **Confirm**
  - *Use a stored card:* Click **View Saved Cards**, choose the correct card to process payment, then click **Confirm**
- To finalize, click **Process**

EMAIL OR TEXT-TO-PAY

where date sent = date paid

- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- On the right, select to send an **Email-to-Pay** or **Text-to-Pay**
- Verify or add the client's phone or email & click **Send Email** or **Send Text**
- Payment in Cornerstone is updated to $0 & marked as *Awaiting Payment*
- Once the client pays, select **Sync** within the Scratch App > Payment Requests > Writebacks *(same day payments only)*
- Cornerstone will update to reflect the payment

Support

- 626-600-7170
- partners@scratchpay.com
- dashboard.scratchpay.com
  *Click **Get Help** (in the lower right)*
- **Prefer visuals?** Check out our: Cornerstone <> Scratch Checkout Guide

Refunds & Cancelations

FULL & PARTIAL REFUNDS

- Create a credit on the client's account
- At checkout, select **Scratch Payment** and enter payment amount as a negative number
- Click the pop-up or into the Scratch App
- Choose appropriate transaction to refund under the **Recent Payments** (right table)
- Select **Process Refund**

Need more help? Use our *Scratch Checkout User Guide* for Interac, Check & Scratch Pay refunds

CANCELING TRANSACTIONS

To remove invoices for payment within the Scratch App, start by clicking the *Delete* text
- **Delete & Reverse** removes the payment from the app and reverses payment in Cornerstone
- **Delete** (only) removes the payment from the Scratch App only, with no changes to Cornerstone

Reporting

DAILY TOTALS

- Located at **dashboard.scratchpay.com**
- Navigate to **Reporting > Daily Totals**
- Use for balancing/end-of-day reconciliation

PAYMENT HISTORY

- Located at **dashboard.scratchpay.com**
- Navigate to **Reporting > Payment History**
- Use to look up specific payments or refunds
- Shows details like date, time, client name, payment method, surcharges, and more

Scratch Pay (loan/financing) reporting can be viewed in the Scratch Dashboard > Financing

Payments - Continued

EMAIL OR TEXT-TO-PAY

where date sent ≠ date paid

- Follow steps on previous page to send the email or text-to-pay
- Once the client pays, select **Manually Record** within the Scratch App > Payment Requests > Writebacks *(no Sync option available for these)*
- **Post a new payment in Cornerstone** that matches the date, amount and client displayed in the **Manually Record Pop-up**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select *Delete* on the transaction line, then **Delete (only)**
- Finally, go back to Payment Requests > Writebacks in the Scratch App, select **Manually Record** again, and click the **Payment Recorded** button

*The original transaction line in Cornerstone will stay noted as $0 Awaiting Payment, however there will also be a new payment recorded on the correct date

SPLIT PAYMENT

- **Option 1:** Code as individual payment amounts within Cornerstone
- **Option 2:** Code card total as Scratch Payment in Cornerstone & **Post**
  - Under the **Terminal/Manual** tile, click the black **Change** text
  - Enter the amount of the first card payment & process normally
  - Process the 2nd card, or select **Change** again to further split

*The Scratch App displays the remaining balance until paid in full. If the client can't pay the entire balance, select Close Out *and adjust their payment amount in Cornerstone.*

CHECK

eCheck (personal check)

- From Cornerstone, select **Check** as payment type, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Be sure the correct invoice to pay is selected
- Enter the check information, then click **Submit Payment**

Lockbox Check (business check)

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to **Payment > Collect Payment > eCheck,** then under the **Business** designation enter the required information & select **Create Lockbox ID**
- Write the Lockbox ID on the check & mail per the instructions provided
- Within Cornerstone, select **Check** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select *Delete* on the transaction line, then **Delete (only)**

Back-up Payment Options

NON-INTEGRATED PAYMENT

Use if Cornerstone, Server or Scratch App is down

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to **Payment > Collect Payment** and take payment
- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right) or go directly to the Scratch App
- Within the App, select *Delete* on the transaction line, then **Delete (only)**

OFFLINE PAYMENT

This payment type has to be set up per each practice, to learn more view this guide *or reach out to Scratch Support to get started*

FAQs

RECONCILIATION

Scenario 1: A payment/refund appears in Scratch reporting but not recorded in Cornerstone

- Within Cornerstone, select **Scratch Payment** at checkout, then click **Post**
- Open the Scratch pop-up (bottom right)
- Within the App, select *Delete* on the transaction line, then **Delete (only)**

Scenario 2: A payment/refund is visible within Cornerstone but not listed in Scratch Reporting

- Check the **To Be Processed** area of the app
- If the transaction is listed, there are 2 options:
  - Collect money from client
  - Select *Delete* then **Delete & Reverse** which will update Cornerstone to $0 *(canceled)*
- If the transaction isn't listed, set payment to $0 in Cornerstone or process as **Non-Integrated** payment *(see instructions to left)*

*Scenario 3: End of day reporting within Cornerstone does not match **Scratch Daily Totals** report*

- Ensure the timeframe is the exact same across both reports
- Use the **Payment History** report from Scratch to investigate individual transactions
- Use above instructions to make adjustments
- Alert Scratch Support for further investigation

APP TROUBLESHOOTING

›› *Payment or Refund transaction does not come through to the Scratch App*

- Verify payment type in Cornerstone is correct, if not remove it and add a new payment/refund
- Ensure the Scratch App is **Online** *(not Offline)*
- Refresh the app
- Log out/in (bottom left)
- Restart your computer
- Check if it is showing on another workstation

If all fail to populate the transaction for payment in the app, reach out to Scratch Support. A **Non-Integrated payment can be taken if needed (instructions to left - first 2 steps only)*

›› *To Be Processed area of the app is still displaying transactions at end of day*

If items are showing in this area at end of day, it signals that payments/refunds have been coded in Cornerstone but not collected by Scratch

- Check **Payment History** within Scratch & the client record in Cornerstone to verify actuals
- If the information is the same in both places select *Delete* in the app, then **Delete (only)**
- If the transaction appears differently across Cornerstone & Scratch, refer to **Scenario 1 or 2**