Scratch Checkout: Quick Start Guide

INSTINCT | SCRATCH EXTENSION

Setting up for Scratch

To use Scratch Checkout with Instinct, the **Scratch Extension** must be installed, logged in, and **Scratch Payment** selected as the payment method at checkout. Your team should always open Instinct in the browser where the extension is active using the website **www.app.instinctvet.cloud**.

Download the browser extension here: CHROME or EDGE

Payments

TERMINAL/CARD READER

- Within Instinct, select **Scratch Payment** as the payment method at checkout
- Enter the transaction amount & click to the left, white area of the screen
- The Scratch modal (pop-up) will appear
- Under the **Reader** option, connect to a terminal and select **Make Payment**
- Tap, insert or swipe payment card (or try other cards if original is declined)
- Wait for confirmation that payment has been recorded within Instinct

MANUAL ENTRY/PHONE PAYMENTS

- Within Instinct, select **Scratch Payment** as the payment method at checkout
- Enter the transaction amount & click to the left, white area of the screen
- The Scratch modal (pop-up) will appear
- Under the **Card** option, enter the card information & select **Make Payment**
- Wait for confirmation that payment has been recorded within Instinct

STORED CARD

- Within Instinct, select **Scratch Payment** as the payment method at checkout
- Enter the transaction amount & click to the left, white area of the screen
- The Scratch modal (pop-up) will appear
- Click the **Card** tab
- *Store a new card:* Enter card details, confirm client email & click **Save Card**
- *Use a stored card:* Select the correct saved card & click **Make Payment**
- Wait for confirmation that payment has been recorded within Instinct

EMAIL OR TEXT-TO-PAY

- Within Instinct, select **Scratch Payment** as the payment method at checkout
- Enter the transaction amount & click to the left, white area of the screen
- The Scratch modal (pop-up) will appear
- Under the **Payment Request** tab, send request via **Text Message** or **Email**
- After the request is sent, no payment information will be visible within Instinct until the client submits payment
- **Once the client pays:** A new payment will be recorded in Instinct

Support

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

Refunds & Cancelations

FULL & PARTIAL REFUNDS

- Create a credit on the client's account in PIMS
- At checkout, select **Refund** as type
- Select **Scratch Payment** as method
- Click to the left, white area of the screen
- Scratch pop-up will appear
- Choose appropriate transaction to refund
- Select **Refund**
- Allow the refund to be recorded in Instinct

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

CANCELING TRANSACTIONS

Within Instinct, after the Scratch pop-up is visible click **Cancel** & no payment will be processed or recorded

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

SPLIT CARD

- Within Instinct, confirm amount of first payment, & select **Scratch Payment**
- Click to the left, white area & the Scratch modal (pop-up) will appear
- Process normally, then repeat for other payments

CHECK

eCheck (personal check)

- Within Instinct, select **Scratch Payment** as the payment method at checkout
- Enter the transaction amount & click to the left, white area of the screen
- The Scratch modal (pop-up) will appear
- Fill out the check details & click **Make Payment**
- Wait for confirmation that the payment has been recorded in Instinct
- ***Note:*** The physical check does NOT need to be deposited or sent to bank

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 Instinct, select **Check*** as payment method at checkout
- Click to the left, white area & the Scratch modal (pop-up) will appear
- Select **Skip and Post**
- Wait for confirmation that the payment has been recorded in Instinct

*To accept Check payments through the Scratch Extension, the Check payment type must be enabled for your practice. Reach out to Scratch Support for more information.

SCRATCH PAY (LOAN/FINANCING)

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to the **Financing** tab & locate the client's payment plan
- Click **Finalize** or **Edit** to the right of the plan listing
- **Confirm the total** dollar amount of Scratch Pay financing the client will be using (if using the **Edit** feature, be sure to enter the full updated total, not just the additional amount being added)
- Within Instinct, select **Scratch Financing** as payment type at checkout (or designated Scratch Pay payment type) then click **Record Transaction**

Back-up Payment Options

NON-INTEGRATED PAYMENT

Use if Instinct or Scratch Extension is down

- Navigate to the Scratch Dashboard @ **dashboard.scratchpay.com**
- Go to **Payment > Collect Payment** and take payment
- **If the payment needs to be recorded in Instinct:** Open Instinct in an Incognito window or a non-Chrome/non-Edge browser
- Select **Scratch Payment** as the payment method at checkout
- Select **Record Transaction**

OFFLINE PAYMENT

Not available for all practices, to learn more view this guide

FAQs

RECONCILIATION

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

- **Open Instinct in a non-Chrome or non-Edge browser** (or in an incognito window)
- Enter the transaction amount
- Select **Scratch Payment** at checkout
- Select **Record Transaction**
- Alert Scratch Support for further investigation
- Return to Chrome or Edge

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

- This occurs if the payment attempted to be processed in the wrong browser, or without the Scratch Extension added & active
- Zero out the payment amount in Instinct
- Or, process as **Non-Integrated** payment (see instructions to left)

Scenario 3: *End of day reporting within Instinct 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

EXTENSION TROUBLESHOOTING

›› *Payment Requests are restricted because Instinct credentials need to be re-entered*

- Open the Scratch Extension
- Click **Settings** & **Update or Add Instinct Credentials** with an admin level user
- This only needs to be completed once for the practice, not across every workstation

›› *Scratch pop-up not coming up when selecting Scratch Payment at checkout*

- Check that you are in Chrome or Edge
- Ensure the Scratch Extension is visible & **ON** in the top right corner of the browser
- Log out then back into the Scratch Extension, **refresh** the browser, then retry the payment
- If unsuccessful, close your browser & re-open
- Alert Scratch Support if the issue is not alleviated for further investigation