Scratch Checkout: Quick Start Guide



Setting up for Scratch

To use Scratch Checkout with Neo, the **Scratch Extension** must be installed, logged in, and **Scratch Payment** selected as the payment type at checkout. Your team should always open Neo in the browser where the extension is active.

Download the browser extension here: CHROME or EDGE

Payments

TERMINAL/CARD READER

- Within Neo, select **Scratch Payment** at checkout
- Click the Scratch Payment button & the Scratch pop-up will appear
- Under the **Reader** option, connect to a terminal and select **Make Payment**
- Tap, insert or swipe the payment card (declined payments can be immediately retried without leaving the payment interface)
- · Wait for confirmation that payment has been recorded within Neo

MANUAL ENTRY/PHONE PAYMENTS

- Within Neo, select Scratch Payment at checkout
- Click the Scratch Payment button & the Scratch pop-up will appear
- Under the Card option, enter the card information & select Make Payment
- Wait for confirmation that payment has been recorded within Neo

STORED CARD

- Within Neo, select Scratch Payment at checkout
- Click the Scratch Payment button & the Scratch 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 Neo

EMAIL OR TEXT-TO-PAY

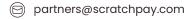
- Within Neo, select Scratch Payment at checkout
- Click the **Scratch Payment button** & the Scratch pop-up will appear
- Under the **Payment Request** tab, send request via **Text Message** or **Email**
- After the request is sent, no payment information will be visible within Neo until the client submits payment
- Once the client pays: A new payment will be recorded in Neo

SPLIT CARD

- Within Neo, confirm amount of first payment, then select **Scratch Payment**
- Click the **Scratch Payment button** & the Scratch pop-up will appear
- · Process normally, then repeat for other payments

Support

626-600-7170



dashboard.scratchpay.com

Click **Get Help** (in the lower right)

Prefer visuals? Check out our:
Neo <> Scratch Checkout Guide

Refunds & Cancellations

FULL & PARTIAL REFUNDS

- Create a credit on the client's account in Neo
- Next, select the line with the credit & click on the Refund button (top of screen)
- Select Scratch Payment as method
- Click the Scratch Refund button
- · Scratch pop-up will appear
- · Choose appropriate transaction to refund
- Select Refund
- Allow the refund to be recorded in Neo

Need more help? Use our <u>Scratch Checkout User</u> <u>Guide</u> for Interac, Check & Scratch Pay refunds

CANCELING TRANSACTIONS

Within Neo, 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

CHECK

eCheck (personal check)

- Within Neo, select Check* as payment type at checkout
- Click the Scratch Payment button & the Scratch pop-up will appear
- Fill out the check details & click Make Payment
- · Wait for confirmation that the payment has been recorded in Neo
- 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 Neo, select Check* as payment type at checkout
- Click the Scratch Payment button & the Scratch pop-up will appear
- Select Skip and Post
- Wait for confirmation that the payment has been recorded in Neo

*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 Neo, select Scratch Financing as payment type at checkout (or designated Scratch Pay payment type) then click Pay

Back-up Payment Options

NON-INTEGRATED PAYMENT

Use if Neo 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 Neo: Open Neo in an Incognito window or a non-Chrome/non-Edge browser
- Select Scratch Payment as the payment type at checkout
- Select Pay

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 Neo

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

Scenario 2: A payment/refund is visible within Neo 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 Neo
- Or, process as Non-Integrated payment (see instructions to left)

Scenario 3: End of day reporting within Neo 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 Neo credentials need to be re-entered
- Open the Scratch Extension
- Click Settings & Update or Add Neo 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