

# Scratch Checkout: Quick Start Guide



RHAPSODY | SCRATCH EXTENSION

## Setting up for Scratch

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

**Download the browser extension here:** [CHROME](#) or [EDGE](#)

## Payments

### TERMINAL/CARD READER

- Within Rhapsody, select **ScratchPay** as payment method 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 Rhapsody

### MANUAL ENTRY/PHONE PAYMENTS

- Within Rhapsody, select **ScratchPay** as payment method 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 Rhapsody

### STORED CARD

- Within Rhapsody, select **ScratchPay** as payment method 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 Rhapsody

### EMAIL OR TEXT-TO-PAY

- Within Rhapsody, select **ScratchPay** as payment method 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 will be visible within Rhapsody
- **Once the client pays:** Your practice will receive an email alert & the payment will be visible in the **Scratch Payment History** report
- Open Rhapsody in an Incognito window or a non-Chrome/Edge browser
- Select **ScratchPay** as the payment method at checkout & record the payment on the date received
- Click **Record Transaction**
- Return to Chrome or Edge

## Support

☎ 626-600-7170

✉ [partners@scratchpay.com](mailto:partners@scratchpay.com)

💬 [dashboard.scratchpay.com](https://dashboard.scratchpay.com)  
Click **Get Help** (in the lower right)

🖥 **Prefer visuals?** Check out our:  
[Rhapsody <> Scratch Checkout Guide](#)

## Refunds & Cancellations

### FULL & PARTIAL REFUNDS

- Create a credit on the client's account in PIMS
- Click **Submit Refund**
- Select **ScratchPay** as payment 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 Rhapsody

**Need more help?** Use our [Scratch Checkout User Guide](#) for Interac, Check & Scratch Pay refunds

### CANCELING TRANSACTIONS

Within Rhapsody, 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 Rhapsody, select **Check\*** as payment method 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 Rhapsody
- **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 Rhapsody, select **Check\*** as payment method 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 Rhapsody

*\*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.*

### SPLIT CARD

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

### 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 Rhapsody, select **Other** as method, then click **Record Transaction**

## Back-up Payment Options

### NON-INTEGRATED PAYMENT

*Use if Rhapsody 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 Rhapsody:** Open Rhapsody in an Incognito window or a non-Chrome/non-Edge browser
- Select **ScratchPay** as the payment method at checkout
- Click **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 Rhapsody

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

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

**Scenario 3:** End of day reporting within Rhapsody 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

**>> Scratch pop-up not coming up when selecting ScratchPay 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

