

Scratch Checkout: Quick Start Guide



SHEPHERD | SCRATCH EXTENSION

Setting up for Scratch

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

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

Payments

TERMINAL/CARD READER

- Within Shepherd, select **Scratch Checkout** as the payment type
- Click anywhere outside of the dropdown & 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 Shepherd

MANUAL ENTRY/PHONE PAYMENTS

- Within Shepherd, select **Scratch Checkout** as the payment type
- Click anywhere outside of the dropdown & 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 Shepherd

**This payment type may not be available for all practices*

STORED CARD

- Within Shepherd, select **Scratch Checkout** as the payment type
- Click anywhere outside of the dropdown & the Scratch pop-up will appear
- **Store a new card:** Scratch offers three ways to store cards, via the terminal, manual entry, or from a payment request (availability varies by location)
- **Use a stored card:** Select the correct saved card on the **Card** or **Saved Cards** tab & click **Make Payment**
- Wait for confirmation that payment has been recorded within Shepherd

EMAIL OR TEXT-TO-PAY

- Within Shepherd, select **Scratch Checkout** as the payment type
- Click anywhere outside of the dropdown & 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 Shepherd until the client submits payment
- **Once the client pays:** A new payment will be recorded in Shepherd

SPLIT CARD

- Within Shepherd, confirm amount of first payment, & select **Scratch Checkout**
- Click anywhere outside of the dropdown & the Scratch pop-up will appear
- Process normally, then repeat for other payments

Support

☎ 626-600-7170

✉ partners@scratchpay.com

💬 dashboard.scratchpay.com
Click **Get Help** (in the lower right)

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

Refunds & Cancellations

FULL & PARTIAL REFUNDS

- Create a credit on the client's account in PIMS
- Within the **Financial** tab, click **Existing Credit Balance** or **More Actions > Issue Credit Balance Refund**
- Select **Scratch Checkout**
- Click the **Scratch Refund** button
- Scratch pop-up will appear
- Choose appropriate transaction to refund
- Select **Refund**
- Allow the refund to be recorded in Shepherd

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

CANCELING TRANSACTIONS

Within Shepherd, 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 Shepherd, select **Check** as the payment type
- Click anywhere outside of the dropdown & the Scratch pop-up will appear
- Fill out the check details & click **Make Payment**
- Wait for confirmation that the payment has been recorded in Shepherd
- **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 Shepherd, select **Check*** as payment type
- Click anywhere outside of the dropdown & the Scratch pop-up will appear
- Select **Skip and Post**
- Wait for confirmation that the payment has been recorded in Shepherd

**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 Shepherd, select **Scratch Pay** as payment type at checkout (or designated Scratch Pay payment type), then click the **Check Out** button

Back-up Payment Options

NON-INTEGRATED PAYMENT

Use if Shepherd 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 Shepherd:** Open Shepherd in an Incognito window or a non-Chrome/non-Edge browser
- Select **Scratch Checkout** as the payment type
- Click the **Check Out** button

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 Shepherd

- **Open Shepherd in a non-Chrome or non-Edge browser** (or in an incognito window)
- Enter the transaction amount
- Select **Scratch Checkout** as payment type
- Click the **Check Out** button
- Alert Scratch Support for further investigation
- Return to Chrome or Edge

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

Scenario 3: End of day reporting within Shepherd 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 Shepherd credentials need to be re-entered

- Open the Scratch Extension
- Click **Settings & Update or Add Shepherd 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 Checkout 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