

# Sage Intergy

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## Payment Processing & Sage Exchange

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Sage Payment Solutions

Sage Exchange



Beginning in the 2011 release of Intergy all previously native credit card payment screens have been removed. Intergy still possess the ability to processed credit card transactions, however they are now utilizing an external PA-DSS\* certified payment platform called Sage Exchange.

This document is focused solely on the processing of credit card payments and the safe storage/retrieval of credits cards through Sage Exchange within the 2011 version of Intergy. Information related to Intergy non-credit card functionality can be found using the help feature within Intergy as well as via the Intergy website ([www.sagehealth.com](http://www.sagehealth.com)).

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Sage Payment Solutions

Sage Exchange



## Installation

Sage Exchange is automatically installed when you either upgrade from a previous version of Intergy or whether you purchase and install a brand new version of the 2011 version of Intergy.

Sage Exchange is designed to run in your bottom right “tray” and this can be confirmed through the presence of a green SE in a white box. In order to utilize the payment functionality inside Intergy, this symbol **must** be present in the bottom right tray. If you right click on the SE symbol and terminate the service or perform a CNTL + ALT + DELETE and request the SageExchange.exe service be terminated you will not be able to process credit card transactions at all.

If the service is terminated (or at Start up), select “Start” in the lower left of your computer, then “All Programs,” then under Sage Payment Solutions you can select “Sage Exchange” to restart the service. **NOTE:** Sage Exchange does not automatically restart when you reboot your computer. You must start the service following the preceding instructions in order to process credit card transactions.

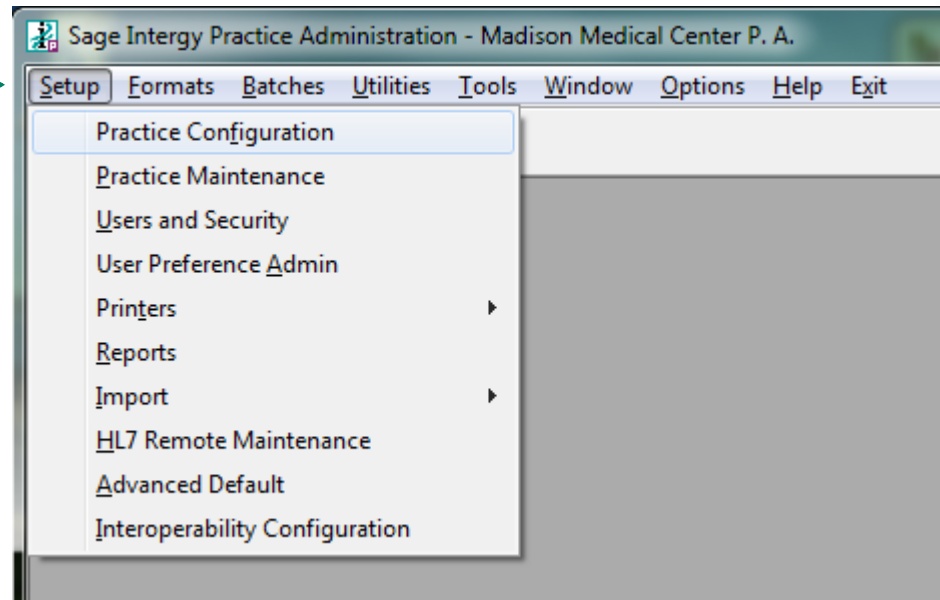
If for whatever reason someone has gone into “Add/Remove Programs” and has removed Sage Exchange completely, you can reinstall it at the following URL:  
<https://www.sageexchange.com/install/frminstall.aspx>

# Getting Started with Credit Card Processing

In order to process credit card transactions through your Intergy software, you must first activate the service.

- (1) Go to the “Setup” tab in your Sage Intergy Practice Administration Menu
- (2) Access Practice Configuration

Setup tab will provide a drop down menu with “Practice Configuration” as the first selection



# Getting Started with Credit Card Processing (Continued)

Set Enable Payment Services for Credit Cards to “Y”

Practice Configuration

Reports Help Close

Parameters

- General
- Security
- Financial
- Insurance
- Ailment
  - Sliding Fee
  - Scheduling
  - Letters/Labels
- Managed Care
- EDI
- RIS
- CHC
- Imaging
- Prescriptions
- Transcription

Parameters

Parameter name contains: enable payment services for  Only Show Field Defaults

Parameter	System Value	Practice Value
Enable Payment Services for Credit Cards	N	Y

Page: EDI -> Payment Services

System Value: N  
Practice Value: Y

Edit

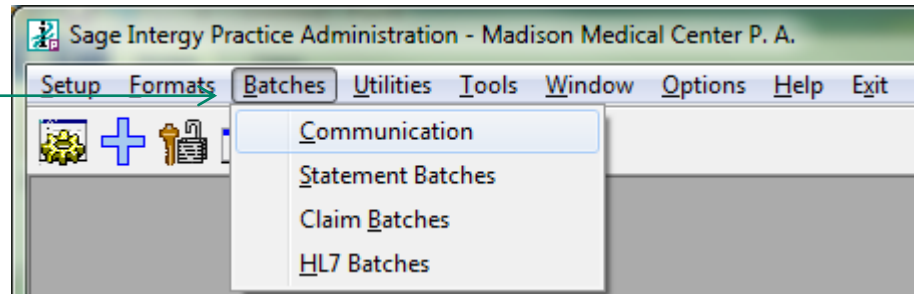
Save

Cancel

# Getting Started with Credit Card Processing (Continued)

## – entering your Merchant ID/Key

- (1) Go to batches tab
- (2) Select Communication on drop down menu

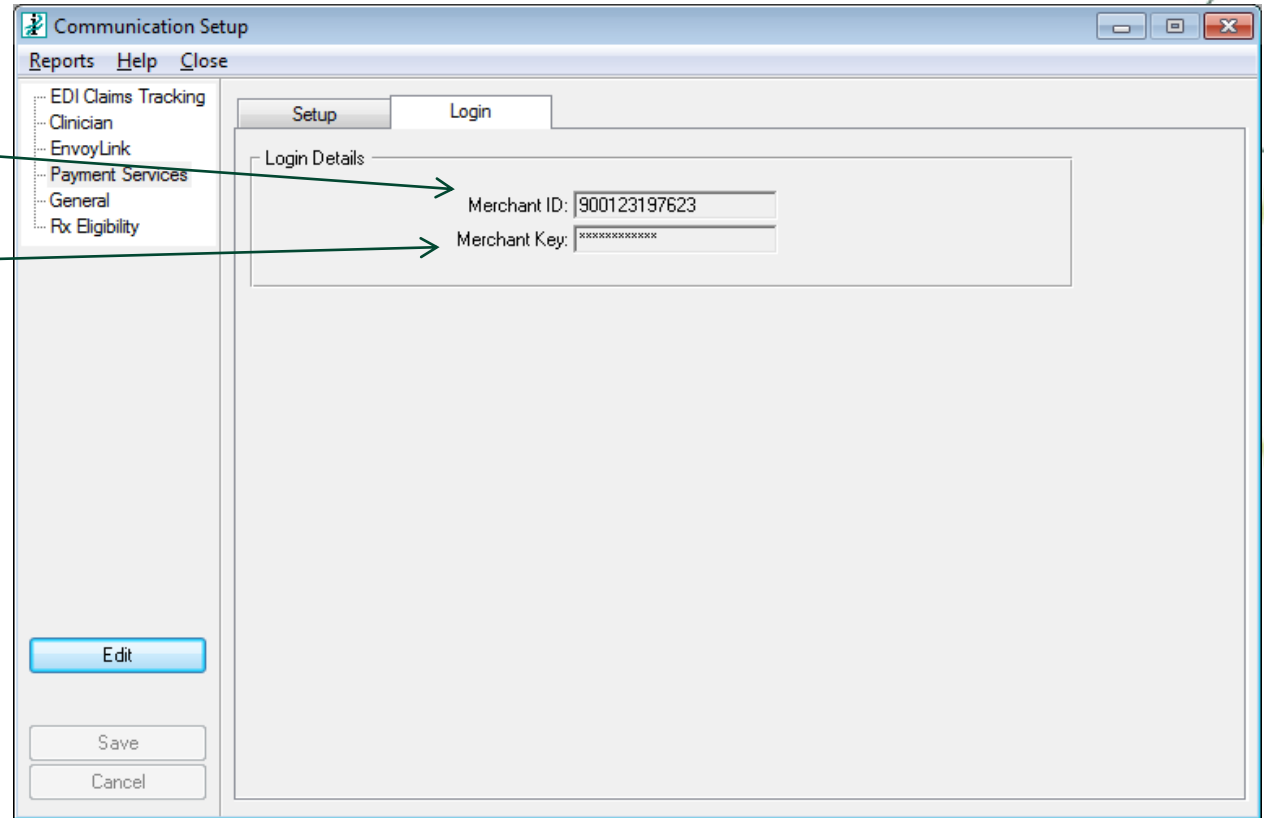


# Getting Started with Credit Card Processing (Continued)

## – Add Mkey and MID

You may save and edit the Merchant ID and Key for the medical practice.

On the Communication setup window:  
(1) click the Payment Services tree node  
(2) click the Login Tab.

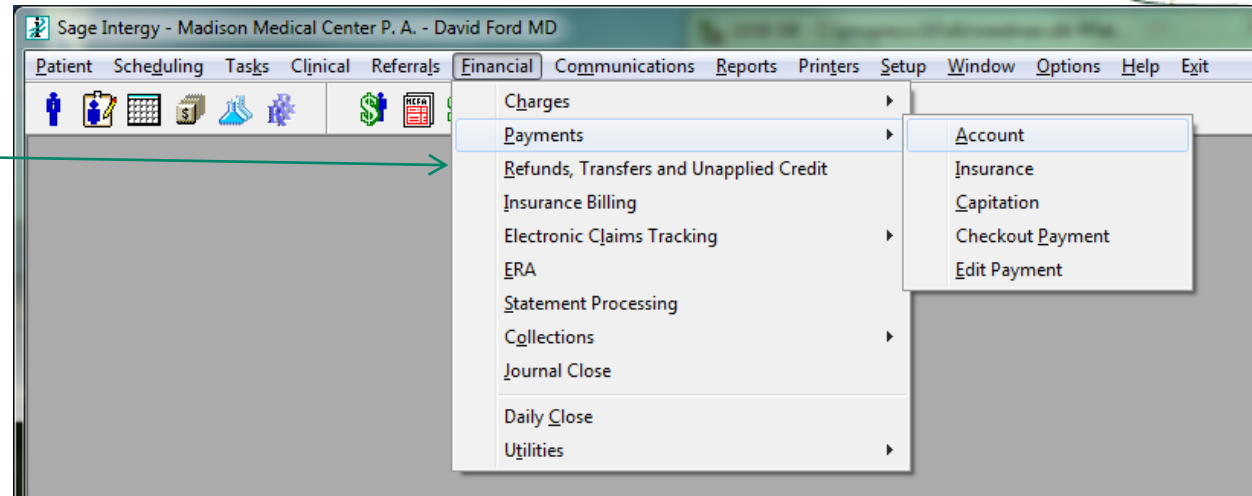




# Processing Credit Card Transactions – Sale Transaction

After you have activated the capability for Intergy to process credit card transactions and have entered your Sage Payment Solutions Merchant Key and Merchant ID information, you are ready to process credit card transactions.

- (1) Go to the Financial Menu
- (2) Select Payments
- (3) Select the Account menu



# Processing Credit Card Transactions – Sale Transaction (continued)

From the Account  
Menu:

- (1) Select a Patient
- (2) Click OK

Select Account for Existing Person

Accounts

Guarantor begins (L,F,M):

Guarantor  Account

Guarantor	Account	Address	City	Status	Class
Aaron, Alice B	2	918 Great Potomac Lake Drive	Madison	Active	STAND
Abdul, Isabelle R	9	12 Wayward Court	Madison	Active	STAND
Abner, Brian C	1	7418 NW 128th Street	Madison	Active	STAND
Arnold, Tracey A	12	123 Gosling Court	Madison	Active	STAND
Bavier, Francis	39	1475 Mayberry Way	Madison	Active	
Benson Manufacturing	814	765 Industrial Park Drive	Madison	Active	INDUS
Bethany, Terrence	51	608 Gaston Drive	Madison	Active	
Blur, Irma	23	208 Blind Corner Lane	Madison	Active	STAND
Bon Jovi, Valerie	33	67 Runway Circle	Madison	Active	
Borgnine, Ingrid	44	1387 Casablanca Lane	Madison	Active	

Details

OK

Cancel

# Processing Credit Card Transactions – Sale Transaction (continued)

Select the Payment button

Account Payment Posting

Account Display Help Close

Account - In Collections Pre-Collected: 12.00

Account: 2 Alice B Aaron

Account Balance: -753.99  
 Guarantor Resp: -931.99  
 Total Unapplied Credit: 994.99

Allocate: Payment

Amount:  
 Unallocated:  
 ... No Payment selected ...

Payment... Post  
 Auto Alloc Receipt...  
 Reset

Charges [All]

Patient begins (L.F.M):

Patient  Plan  Provider  Service Date  Allow multiple selections

Patient	Plan	St	Provider	Service	Procedure	Charge	Adjusts	Receipts	Balance	Flags	Allocate
Aaron, Alice B	BCBS01	GT	DF	10/31/07	99213	130.00	40.00	45.00	45.00	i	0.00
Aaron, Alice B	BCBS01	GT	DF	10/31/07	73030	90.00	30.00	25.00	35.00	i	0.00
Aaron, Alice B	BCBS01	IT	DF	12/21/07	99213	130.00	0.00	4.00	126.00	i	0.00
Aaron, Alice B	MEDG	IU	LK	01/02/08	71020	55.00	0.00	0.00	55.00		0.00
Totals:						405.00	70.00	74.00	261.00		0.00

Action to Perform

Action:

Charge Details

Statement Comment: DA Deductible Applied

Edit Charge Visit Copay: 0.00 Procedure Copay: 0.00

# Processing Credit Card Transactions – Sale Transaction (continued)

If the Select Unallocated payment or Select New dialog displays for the selected patient, select the NEW button

Dialog Title: Select Unallocated Payment or Select New

Guarantor: **Alice B Aaron** General - 01/11/2008

Journal	Posted	User	Voucher	Amount	Unallocated
General	01/11/2008	David Ford MD		12.00	12.00
General	01/11/2008	David Ford MD		12.00	12.00

Buttons: New (circled in red), View / Edit, OK, Cancel

# Processing Credit Card Transactions – Sale Transaction (continued)

In the New Guarantor Payment Screen:

- (1) Enter an amount
- (2) Set payment method to "R"
- (3) Select the Process Button

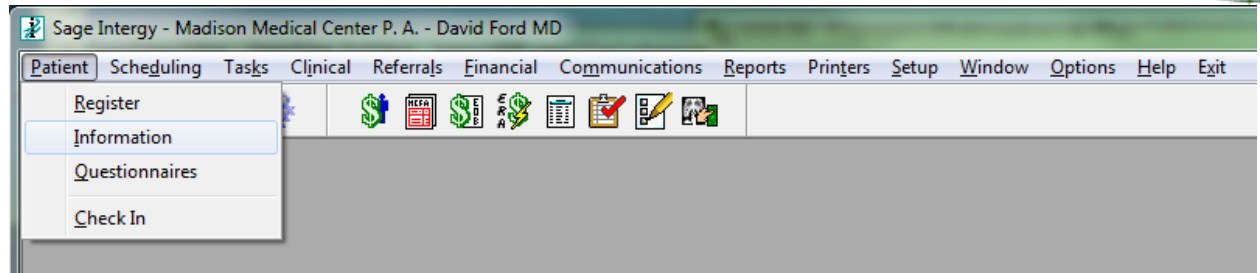
Once the process button is selected it should launch Sage

Exchange (see page 34). If you don't have the exchange part installed it should prompt you to install

The screenshot shows a software dialog box titled "New Guarantor Payment". The dialog is divided into several sections. At the top right, it says "General - 01/11/2008". Below that, the "Guarantor" is listed as "Alice B Aaron". The "Details" section contains the following fields: "Amount" with the value "12.00", "Payment Method" set to "R Charge Card", "Voucher" (empty), "Reference Date" set to "01/11/2008", and "Class" (empty). To the right of these fields are four buttons: "Process" (highlighted in blue), "Clear", "Cancel", and "Note...". Below the "Details" section is a "Verification" section with a checkbox labeled "Forced Sale" which is currently unchecked. The dialog has a standard Windows-style title bar with a close button (X) in the top right corner.

# Processing Credit Card Transactions – Sale Transaction – New Pre-collected Payments (continued)

- (1) Go to the Intergy Screen
- (2) Go to the Patient menu
- (3) Click Information



# Processing Credit Card Transactions – Sale Transaction – New Pre-collected Payments (continued)

- (1) Highlight a patient that has insurance →
- (2) Click the Eligibility button →

Select Patient for Patient Information

Patients

Name begins (L,F,M):   Today's Patients

Name  SSN  Phone  DOB  Patient #  Account #  Chart #  ID: Claim Member

Last	First	Middle	SSN	Phone	DOB	Sex	Patient Number	Account Number
Aaron	Alice	B	100-00-0105	(916) 555-5568	12/11/1940	F	4	2
Abdul	Isabelle	R	820-00-5679	(916) 555-4433	01/06/1987	F	93	9
Abner	Brian	C	100-00-0307	(916) 555-5555	08/16/1966	M	3	1
Abner	Carla	D	100-00-0206	(916) 555-5555	02/07/1970	F	1	1
Abner	Darlene	E	100-00-0408	(916) 555-5555	04/28/2006	F	2	1
Adams	Jeff		011-43-4253	(916) 555-0226	11/13/1954	M		
Arnold	Tracey	A	823-44-7923	(916) 555-2222	10/26/1977	F	95	12
Bavier	Francis		321-65-4768	(916) 574-3354	10/18/1916	F	124	39
Bethany	Terrence		079-48-1626	(916) 723-7723	11/14/1968	M	3007	51
Billings	Holly		059-11-8192	(916) 555-4785	06/10/1985	F		

Patient is hard of hearing. Take time to ensure she understands instructions correctly.

Alerts **Eligibility** Notes Summary OK Cancel

# Processing Credit Card Transactions – Sale Transaction – New Pre-collected Payments (continued)

- (1) On the Patient Summary dialog click the Coverage tab
- (2) Select the Pre-Collect button

Patient Summary: Aaron, Alice B (69y F) SSN: 100-00-0105 Account: 2

Summary Coverage Referrals Eligibility Notes

Policies

Order	Plan	Effective Dates	Assign
1	MEDG - Medicare	10/03/2007 - 10/01/2008	Y
2	BCBS01 - Blue Cross / Blue Shield	10/03/2007 - 10/01/2008	Y

Details:

Plan: **MEDG - Medicare** Member Note:

Group #: Deductible: **75.00**

Claim Member ID: **100-00-0105** Remaining: **0.00**

Start Date: **10/03/2007** End Date: **10/01/2008** Subscriber: **Alice B Aaron - 100-00-0105**

Attn:

Authorization	Amount
Business (202) 555-6789	Standard Visit 0.00
Eligibility (202) 555-4000	Specialist Visit 0.00
Fax (202) 555-1001	Inpatient Visit 0.00

Eligibility Note:

Pre-collect  
Deductible  
Help  
Close



# Processing Credit Card Transactions – Sale Transaction – New Pre-collected Payments (continued)

In the New Pre-Collected Payment screen:

- (1) Enter an amount
- (2) Set payment method to "R"
- (3) Select the Process Button

Once the process button is selected it should launch Sage Exchange (see page 34). If you don't have the exchange part installed it should prompt you to Install it.

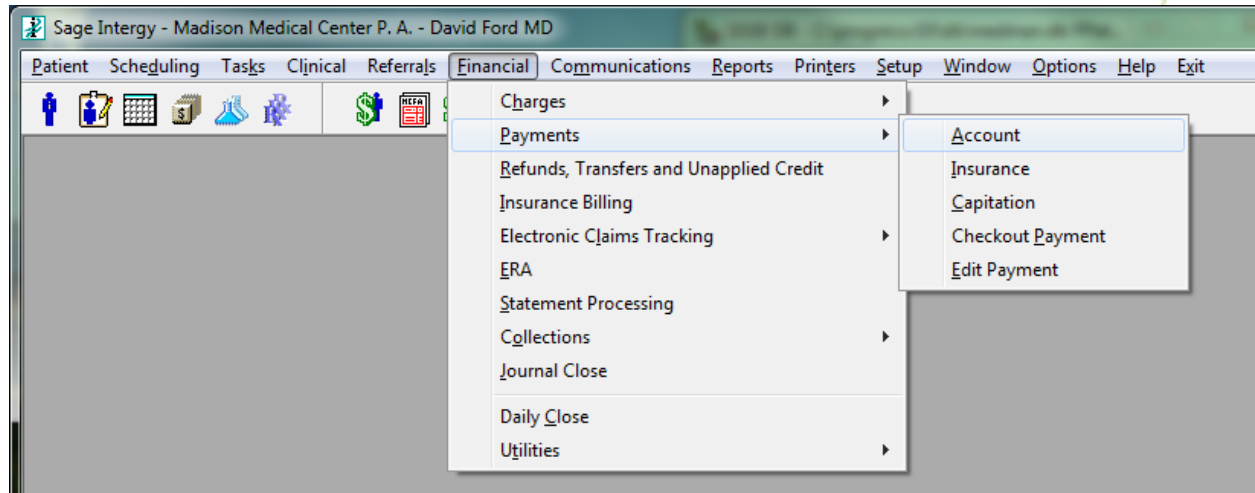
The screenshot shows a software window titled "New Pre-collected Payment" with a close button (X) in the top right corner. The window is divided into several sections:

- General:** Patient: Alice B Aaron, Date: 01/11/2008 (dropdown).
- Credit to:** Account: 2, Guarantor: Alice B Aaron, Provider: DF David E Ford MD, Department: [empty].
- Details:** Amount: 12.00, Payment Method: R Charge Card, Voucher: [empty], Reference Date: 01/11/2008, Class: [empty]. A "Set Visit Copay" button is next to the amount field.
- Verification:** A checkbox for "Forced Sale" is present.
- Buttons:** On the right side, there are buttons for "Process" (highlighted with a red rectangle), "Receipt...", "Clear", "Close", and "Note...".

# Processing Credit card Transactions – Forced Sale Transaction

In New Guarantor Payments screen:

- (1) Go to Financial drop down menu
- (2) Select Payments
- (3) Select Accounts



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# Processing Credit card Transactions – Forced Sale Transaction

- (1) Select a patient
- (2) Click OK

Select Account for Existing Person

Accounts

Guarantor begins (L,F,M):

Guarantor  Account

Guarantor	Account	Address	City	Status	Class
Aaron, Alice B	2	918 Great Potomac Lake Drive	Madison	Active	STAND
Abdul, Isabelle R	9	12 Wayward Court	Madison	Active	STAND
Abner, Brian C	1	7418 NW 128th Street	Madison	Active	STAND
Arnold, Tracey A	12	123 Gosling Court	Madison	Active	STAND
Bavier, Francis	39	1475 Mayberry Way	Madison	Active	
Benson Manufacturing	814	765 Industrial Park Drive	Madison	Active	INDUS
Bethany, Terrence	51	608 Gaston Drive	Madison	Active	
Blur, Irma	23	208 Blind Corner Lane	Madison	Active	STAND
Bon Jovi, Valerie	33	67 Runway Circle	Madison	Active	
Borgnine, Ingrid	44	1387 Casablanca Lane	Madison	Active	

Details

OK

Cancel

# Processing Credit card Transactions – Forced Sale Transaction

Select the Payment Button

Account Payment Posting

Account: 2 Alice B Aaron

Account Balance: -753.99  
Guarantor Resp: -931.99  
Total Unapplied Credit: 994.99

Allocate: Payment

Amount:  
Unallocated:  
... No Payment selected ...

Payment... (highlighted)

Post  
Receipt...  
Reset

Charges [All]

Patient begins (L,F,M):

Patient  Plan  Provider  Service Date  Allow multiple selections

Patient	Plan	St	Provider	Service	Procedure	Charge	Adjusts	Receipts	Balance	Flags	Allocate
Aaron, Alice B	BCBS01	GT	DF	10/31/07	99213	130.00	40.00	45.00	45.00	i	0.00
Aaron, Alice B	BCBS01	GT	DF	10/31/07	73030	90.00	30.00	25.00	35.00	i	0.00
Aaron, Alice B	BCBS01	IT	DF	12/21/07	99213	130.00	0.00	4.00	126.00	i	0.00
Aaron, Alice B	MEDG	IU	LK	01/02/08	71020	55.00	0.00	0.00	55.00		0.00
Totals:						405.00	70.00	74.00	261.00		0.00

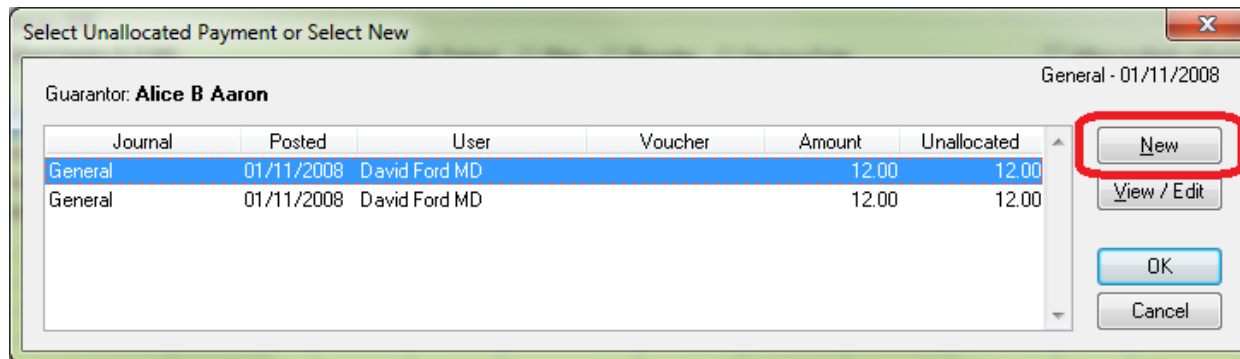
Action to Perform: Action:

Charge Details: Statement Comment: DA Deductible Applied

Edit Charge Visit Copy: 0.00 Procedure Copy: 0.00

# Processing Credit card Transactions – Forced Sale Transaction

If the Select Unallocated payment or Select New dialog displays for the selected patient, select the NEW button



# Processing Credit card Transactions – Forced Sale Transaction

In the New Guarantor Payment screen:

- (1) Enter an amount
- (2) Set payment method to "R"
- (3) Check the Forced Sale toggle
- (4) Enter in an Authorization Code
- (5) Select the Process Button

Once the process button is selected it should launch Sage Exchange. If you don't have the exchange part installed it should prompt you to Install.

New Guarantor Payment

General - 01/11/2008

Guarantor: Alice B Aaron

Details

Amount: 12.00

Payment Method: R Charge Card

Voucher:

Reference Date: 01/11/2008

Class:

Verification

Forced Sale

Authorization: 223333

Process

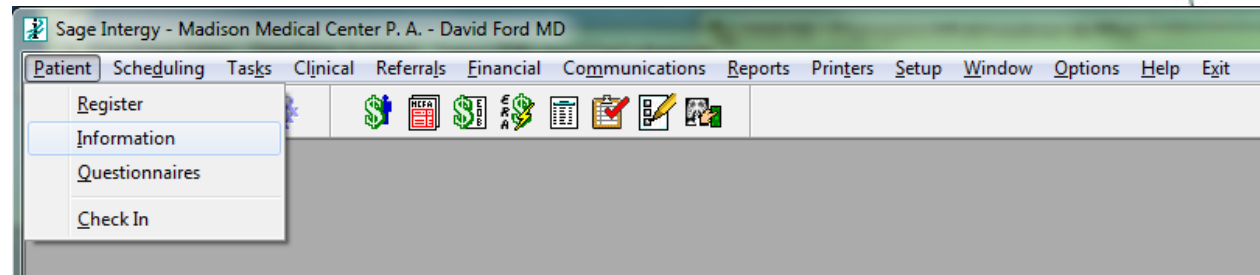
Clear

Cancel

Note...

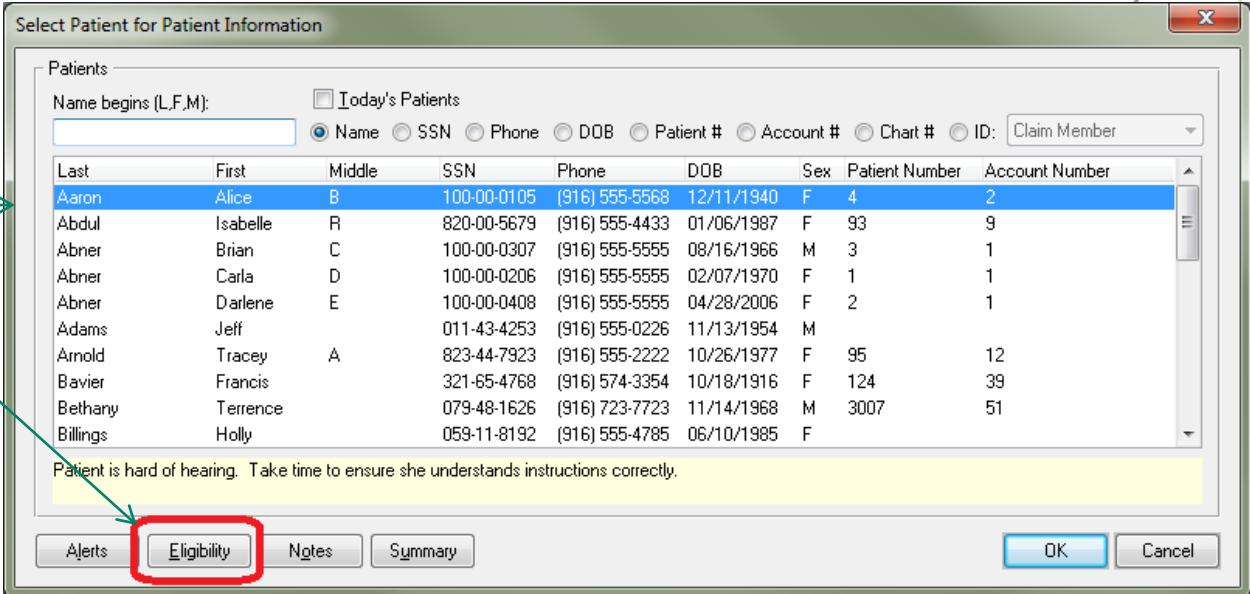
# Processing Credit card Transactions – Forced Sale Transaction- New Pre-collected Payments

- (1) Go to Intergy screen
- (2) Select Patient menu
- (3) Click Information menu



# Processing Credit card Transactions – Forced Sale Transaction- New Pre-collected Payments

- (1) Highlight a patient that has insurance
- (2) Click the Eligibility button



Select Patient for Patient Information

Patients

Name begins (L,F,M):   Today's Patients

Name  SSN  Phone  DOB  Patient #  Account #  Chart #  ID: Claim Member

Last	First	Middle	SSN	Phone	DOB	Sex	Patient Number	Account Number
Aaron	Alice	B	100-00-0105	(916) 555-5568	12/11/1940	F	4	2
Abdul	Isabelle	R	820-00-5679	(916) 555-4433	01/06/1987	F	93	9
Abner	Brian	C	100-00-0307	(916) 555-5555	08/16/1966	M	3	1
Abner	Carla	D	100-00-0206	(916) 555-5555	02/07/1970	F	1	1
Abner	Darlene	E	100-00-0408	(916) 555-5555	04/28/2006	F	2	1
Adams	Jeff		011-43-4253	(916) 555-0226	11/13/1954	M		
Arnold	Tracey	A	823-44-7923	(916) 555-2222	10/26/1977	F	95	12
Bavier	Francis		321-65-4768	(916) 574-3354	10/18/1916	F	124	39
Bethany	Terrence		079-48-1626	(916) 723-7723	11/14/1968	M	3007	51
Billings	Holly		059-11-8192	(916) 555-4785	06/10/1985	F		

Patient is hard of hearing. Take time to ensure she understands instructions correctly.

Alerts **Eligibility** Notes Summary OK Cancel



# Processing Credit card Transactions – Forced Sale Transaction- New Pre-collected Payments

- (1) On the Patient Summary screen click the Coverage tab
- (2) Select the Pre-Collect button

Patient Summary: Aaron, Alice B (69y F) SSN: 100-00-0105 Account: 2

Summary Coverage Referrals Eligibility Notes

Policies

Order	Plan	Effective Dates	Assign
1	MEDG - Medicare	10/03/2007 - 10/01/2008	Y
2	BCBS01 - Blue Cross / Blue Shield	10/03/2007 - 10/01/2008	Y

Details:

Plan: **MEDG - Medicare** Member Note:

Group #: Deductible: **75.00**

Claim Member ID: **100-00-0105** Remaining: **0.00**

Start Date: **10/03/2007** End Date: **10/01/2008** Subscriber: **Alice B Aaron - 100-00-0105**

Attn:

Authorization	Amount
Business (202) 555-5501	Standard Visit 0.00
Eligibility (202) 555-6789	Specialist Visit 0.00
Fax (202) 555-4000	Inpatient Visit 0.00
(202) 555-1001	

Eligibility Note:

Pre-collect  
Deductible  
Help  
Close

# Processing Credit card Transactions – Forced Sale Transaction- New Pre-collected Payments

In the New Pre-Collected Payment screen:

- (1) Enter an amount
- (2) Set payment method to "R"
- (3) Check the Forced Sale toggle
- (4) Enter in an Authorization Code
- (5) Select the Process Button

Once the process button is selected it should launch Sage Exchange (see page 34)

If you don't have the exchange part installed it should prompt you to install.

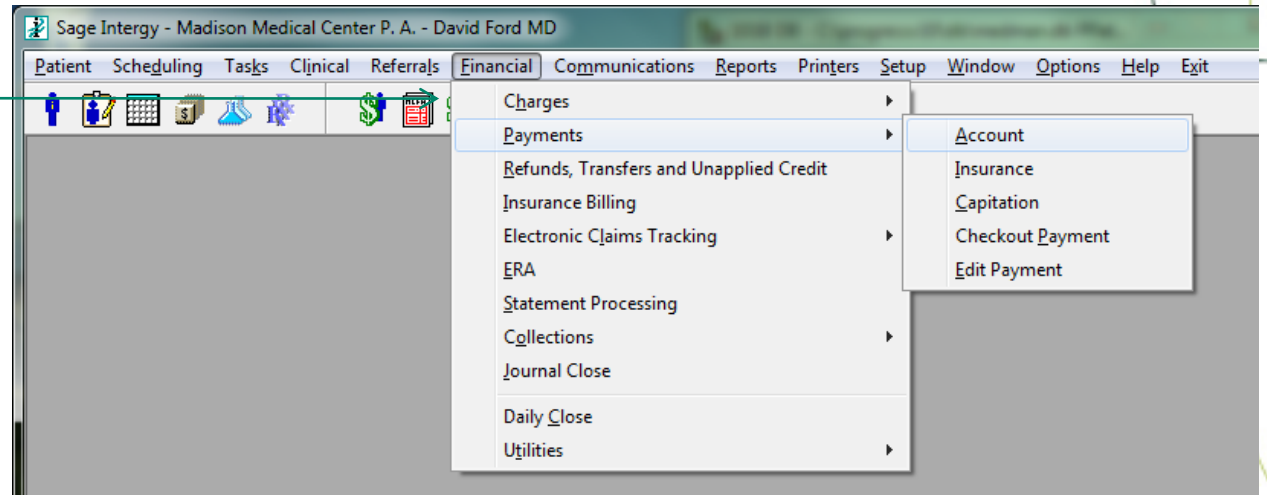
The screenshot shows a software window titled "New Pre-collected Payment" with a close button (X) in the top right corner. The window is divided into several sections:

- General:** Patient: Alice B Aaron, Date: 01/11/2008 (dropdown).
- Credit to:** Account: 2, Guarantor: Alice B Aaron, Provider: DF David E Ford MD, Department: [empty].
- Details:** Amount: 12.00, Payment Method: R Charge Card, Voucher: [empty], Reference Date: 01/11/2008, Class: [empty]. A "Set Visit Copay" button is also present.
- Verification:**  Forced Sale, Authorization: 333222.

On the right side of the window, there are several buttons: "Process" (highlighted with a red box), "Receipt...", "Clear", "Close", and "Note...".

# Processing Credit card Transactions – New Guarantor Payments

- (1) Go to Intergy screen
- (2) Select Financial menu
- (3) Select payments
- (4) Select Account



# Processing Credit card Transactions – New Guarantor Payments

(1) Select a Patient

(2) Click OK

Select Account for Existing Person

Accounts

Guarantor begins (L,F,M):

Guarantor  Account

Guarantor	Account	Address	City	Status	Class
Aaron, Alice B	2	918 Great Potomac Lake Drive	Madison	Active	STAND
Abdul, Isabelle R	9	12 Wayward Court	Madison	Active	STAND
Abner, Brian C	1	7418 NW 128th Street	Madison	Active	STAND
Arnold, Tracey A	12	123 Gosling Court	Madison	Active	STAND
Bavier, Francis	39	1475 Mayberry Way	Madison	Active	STAND
Benson Manufacturing	814	765 Industrial Park Drive	Madison	Active	INDUS
Bethany, Terrence	51	608 Gaston Drive	Madison	Active	STAND
Blur, Irma	23	208 Blind Corner Lane	Madison	Active	STAND
Bon Jovi, Valerie	33	67 Runway Circle	Madison	Active	STAND
Borghine, Ingrid	44	1387 Casablanca Lane	Madison	Active	STAND

Details

OK

Cancel

# Processing Credit card Transactions – New Guarantor Payments

Select the Payment  
Button

Account Payment Posting

Account Display Help Close

Account: **In Collections** Pre-Collected: 12.00

Account: **2** **Alice B Aaron**

Account Balance: -753.99  
 Guarantor Resp: -931.99  
 Total Unapplied Credit: 994.99

Allocate: **Payment**

Amount:  
 Unallocated:  
 ... **No Payment selected** ...

General: 01/11/2008

**Payment...** Post  
 Auto Alloc Receipt...  
 Reset

Charges [All]

Patient begins (L,F,M):   Patient  Plan  Provider  Service Date  Allow multiple selections

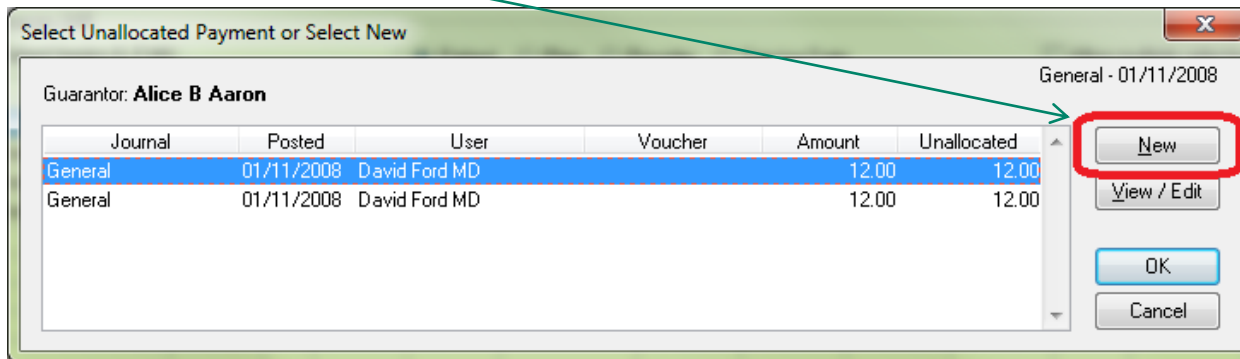
Patient	Plan	St	Provider	Service	Procedure	Charge	Adjusts	Receipts	Balance	Flags	Allocate
Aaron, Alice B	BCBS01	GT	DF	10/31/07	99213	130.00	40.00	45.00	45.00	i	0.00
Aaron, Alice B	BCBS01	GT	DF	10/31/07	73030	90.00	30.00	25.00	35.00	i	0.00
Aaron, Alice B	BCBS01	IT	DF	12/21/07	99213	130.00	0.00	4.00	126.00	i	0.00
Aaron, Alice B	MEDG	IU	LK	01/02/08	71020	55.00	0.00	0.00	55.00		0.00
						Totals:	405.00	70.00	74.00	261.00	<b>0.00</b>

Action to Perform  
 Action:

Charge Details  
 Statement Comment: DA  Deductible Applied  
 Visit Copay: 0.00  Procedure Copay: 0.00

# Processing Credit card Transactions – New Guarantor Payments

If the Select Unallocated payment or Select New dialog displays for the selected patient, select the **NEW** button



# Processing Credit card Transactions – New Guarantor Payments

In the New Guarantor Payment screen:

- (1) Enter an amount
- (2) Set payment method to "R"
- (3) Select the Process Button

Once the process button is selected it should launch

Sage Exchange.

If you don't have the exchange installed it should prompt you to install.

The screenshot shows a 'New Guarantor Payment' dialog box. At the top, it says 'General - 01/11/2008'. Below that, 'Guarantor: Alice B Aaron'. The 'Details' section contains:  
Amount: 12.00  
Payment Method: R Charge Card  
Voucher: [empty field]  
Reference Date: 01/11/2008  
Class: [empty field]  
On the right side of the dialog are four buttons: 'Process' (highlighted in blue), 'Clear', 'Cancel', and 'Note...'. The 'Verification' section at the bottom has a checkbox for 'Forced Sale' which is currently unchecked.

# Sage Exchange Payment Module

Once the process button is clicked Sage Exchange will open. Enter in the needed Information here and click the submit button.

Sage Exchange - Sale

Sage Exchange

Payment Information Bill To

Card number 4111111111111111

Swipe Card

Expiration date 03 10

CVV 3322

Subtotal 12.00

Total 12.00

Click For Support

Thank you for using Sage Exchange

Back Next Submit Cancel

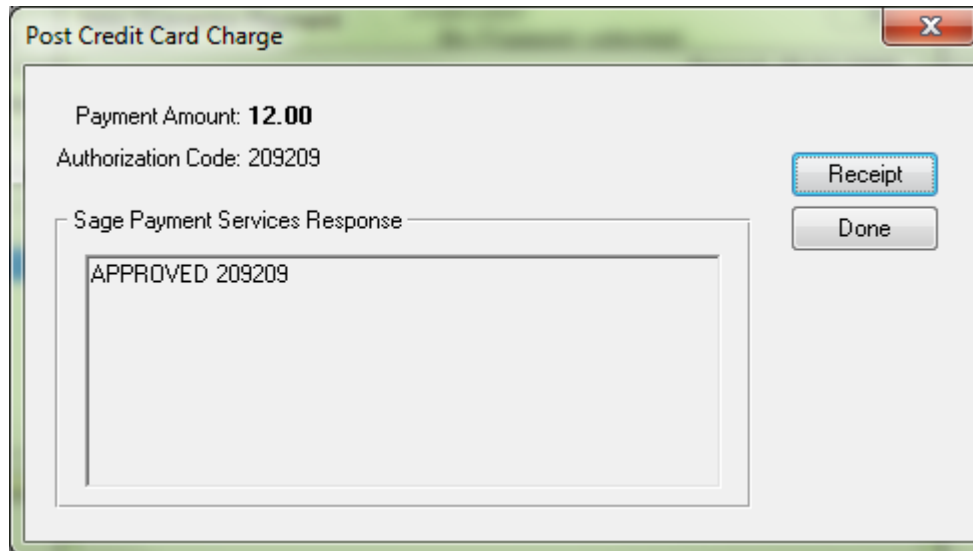
sage

00:14:43



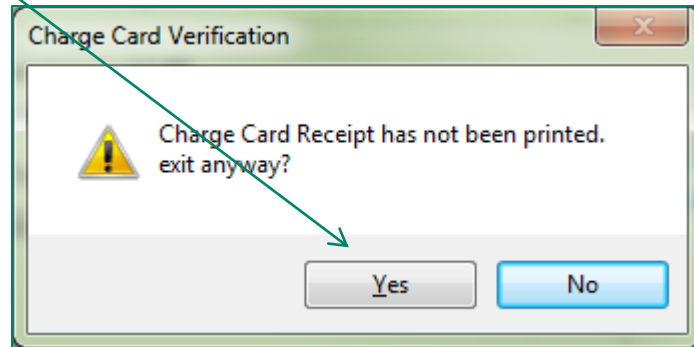
## Payment Authorization

Once the Sage Exchange module closes, if the sale transaction was approved the following Dialog will display, showing the authorization code and allowing the user to print a receipt.



## Payment Receipt

If you don't print a receipt and click the Done button you will get the following message, click YES



# Payment Updating/Posting

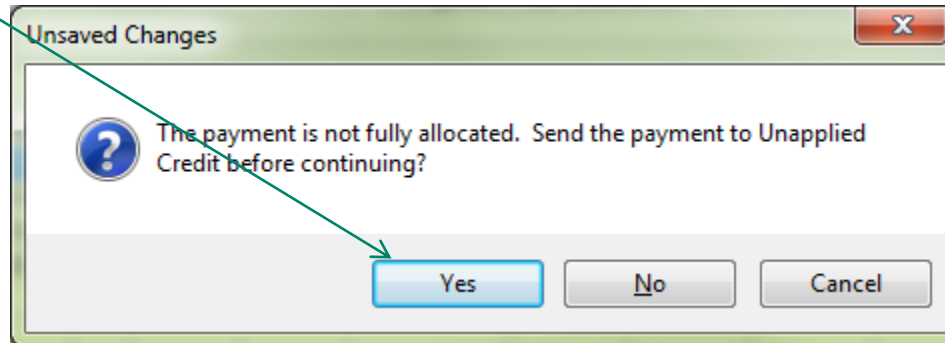
The Account Payment Posting window will now be updated with the new payment information. You don't want to post the payment yet. Click the [X] at the top of the window.

The screenshot shows the 'Account Payment Posting' window. At the top right, there are window control buttons: minimize, maximize, and close (X). A green arrow points from the text above to the close button. In the center of the window, a red box highlights the 'Allocate: Payment' dropdown menu. Below this, the 'Amount: 12.00' and 'Unallocated: 12.00' are displayed. The text 'Payment from Guarantor - 01/11/2008' is also visible. To the right of the dropdown are buttons for 'Edit Payment...', 'Auto Alloc', 'Post', 'Receipt...', and 'Reset'. The window title bar includes 'Account Payment Posting' and menu options 'Account', 'Display', 'Help', and 'Close'. The main area shows account details for 'Alice B Aaron' and a table of charges.

Patient	Plan	St	Provider	Service	Procedure	Charge	Adjusts	Receipts	Balance	Flags	Allocate
Aaron, Alice B	BCBS01	GT	DF	10/31/07	99213	130.00	40.00	45.00	45.00	i	0.00
Aaron, Alice B	BCBS01	GT	DF	10/31/07	73030	90.00	30.00	25.00	35.00	i	0.00
Aaron, Alice B	BCBS01	IT	DF	12/21/07	99213	130.00	0.00	4.00	126.00	i	0.00
Aaron, Alice B	MEDG	IU	LK	01/02/08	71020	55.00	0.00	0.00	55.00		0.00
Totals:						405.00	70.00	74.00	261.00		0.00

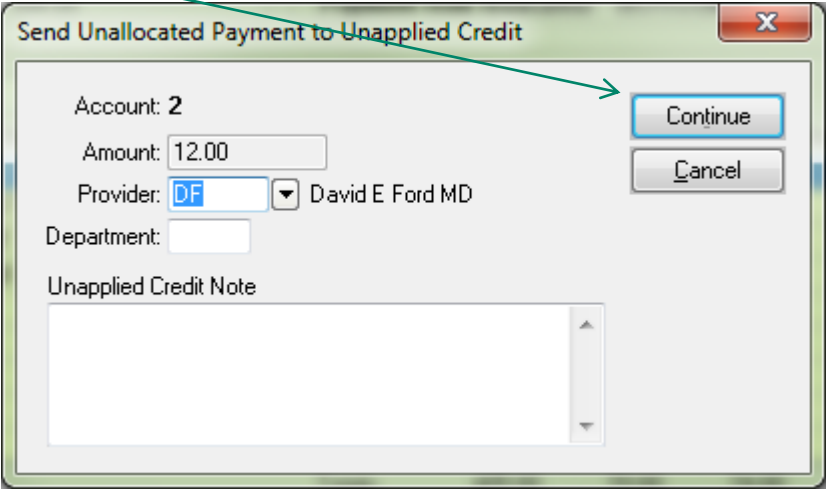
## Payment Updating/Posting

The Unsaved Changes message will display. Select YES to send the payment to unapplied credit.



# Payment Updating/Posting

Select a provider (you can just press the down arrow key to populate it) and click the continue button.



The screenshot shows a dialog box titled "Send Unallocated Payment to Unapplied Credit". It contains the following fields and controls:

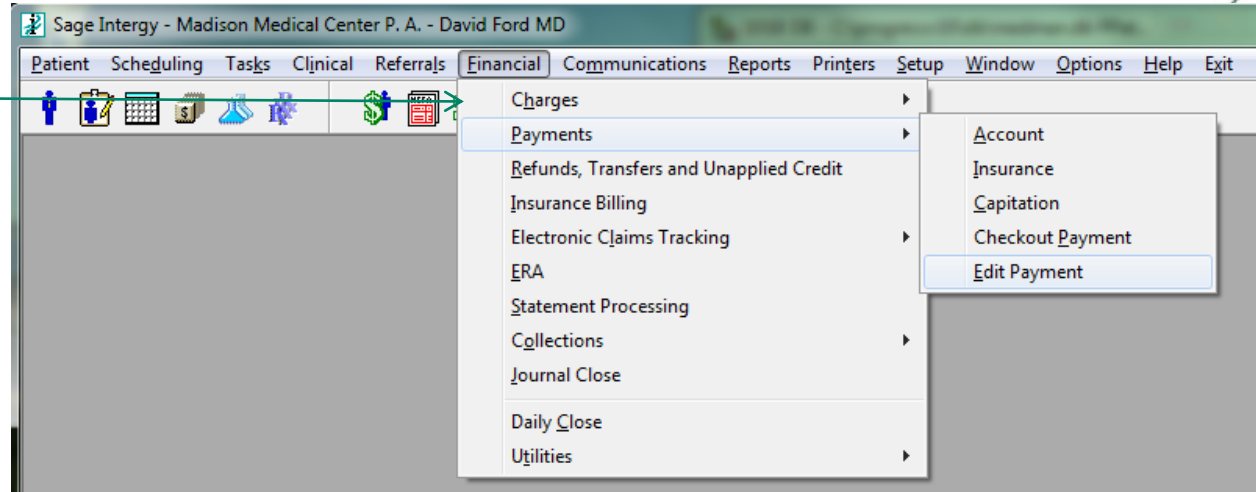
- Account: 2
- Amount: 12.00
- Provider: DF (selected) David E Ford MD
- Department: (empty)
- Unapplied Credit Note: (empty text area)
- Buttons: Continue and Cancel

A green arrow points from the text above to the "Continue" button.

# Processing Credit card Transactions – Void Transaction

Go to:

- (1) Financial menu
- (2) Payment
- (3) edit payment



# Processing Credit card Transactions – Void Transaction

- (1) Select drop down
- (2) Pick "Payments from Guarantor"

Journal begins:   Journal  Payer  Amount

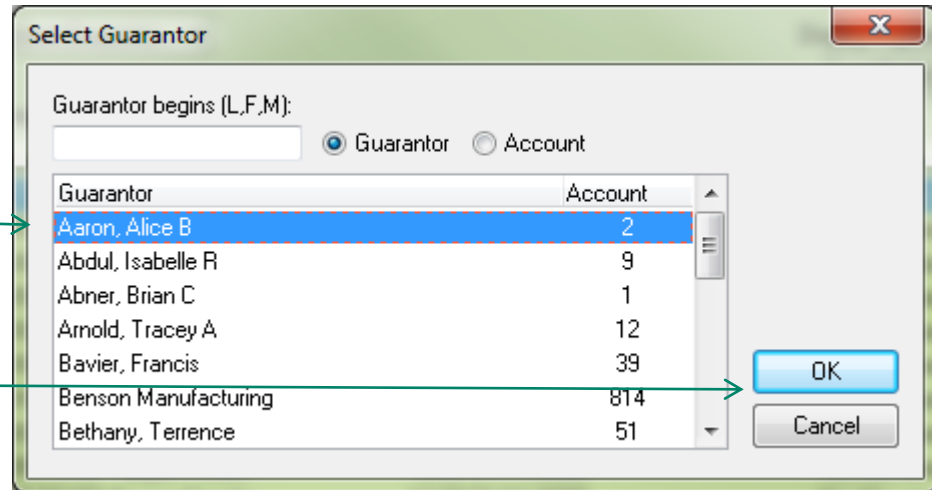
Display Payments Since: Last Daily Close

Journal	Payer	Amount	Ref. Date	Voucher	Status
General - 01/08/08	Blue Cross / Blue S	0.00	01/08/2008		No Allocations
General - 01/08/08	Brian C Abner	5.00	01/08/2008		No Allocations
General - 01/08/08	Timothy R Davis	20.00	01/08/2008		Partially Allocated
General - 01/08/08	Gordon R Green	100.00	01/08/2008	EFT-B2604	No Allocations
General - 01/11/08	Aetna Life & Casual	3.00	01/11/2008		No Allocations
General - 01/11/08	Ingrid Borgnine	4.00	01/11/2008		No Allocations
General - 01/11/08	Alice B Aaron	12.00	01/11/2008		No Allocations
General - 01/11/08	Terrence Bethany	12.00	01/11/2008		No Allocations
General - 01/11/08	Tanya A Smith	12.00	01/11/2008		No Allocations
General - 01/11/08	George Sander	14.00	01/11/2008		No Allocations
General - 01/11/08	Bridget Rash	12.00	01/11/2008		No Allocations

View/Edit...

# Processing Credit card Transactions – Void Transaction

- (1) Select guarantor that has the payment you posted
- (2) Click the OK button





# Processing Credit card Transactions – Void Transaction

- (1) Highlight the payment you posted
- (2) Click the View/Edit button

Payments from Guarantor: Alice B Aaron

Display Payments Since: Last Daily Close (01/02/2008)

Ref on/before: / /     Ref Date     Voucher     Amount

Ref Date	Voucher	Amount	Method	Class	Status
01/11/2008		12.00	Charge Card		Fully Allocated
01/11/2008		12.00	Charge Card		Fully Allocated
01/11/2008		999.99	Charge Card		Fully Allocated
01/11/2008		12.00	Charge Card		Fully Allocated
01/11/2008		12.00	Check		Fully Allocated
01/11/2008		12.00	Check		No Allocations
01/11/2008		12.00	Check		No Allocations
01/11/2008		3.00	Charge Card		Fully Allocated

View/Edit...

# Processing Credit card Transactions – Void Transaction

- (1) Highlight the payment
- (2) Click void button

Payment:

Payer: **Guarantor - Aaron, Alice B**      Journal: **General**      Method: **Charge Card**  
Amount: **12.00**      Post Date: **01/11/08**      Authorization: **209209**  
Ref. Date: **01/11/08**      Status: **Fully Allocated**      Card Type: **Visa**  
Voucher:      Class:

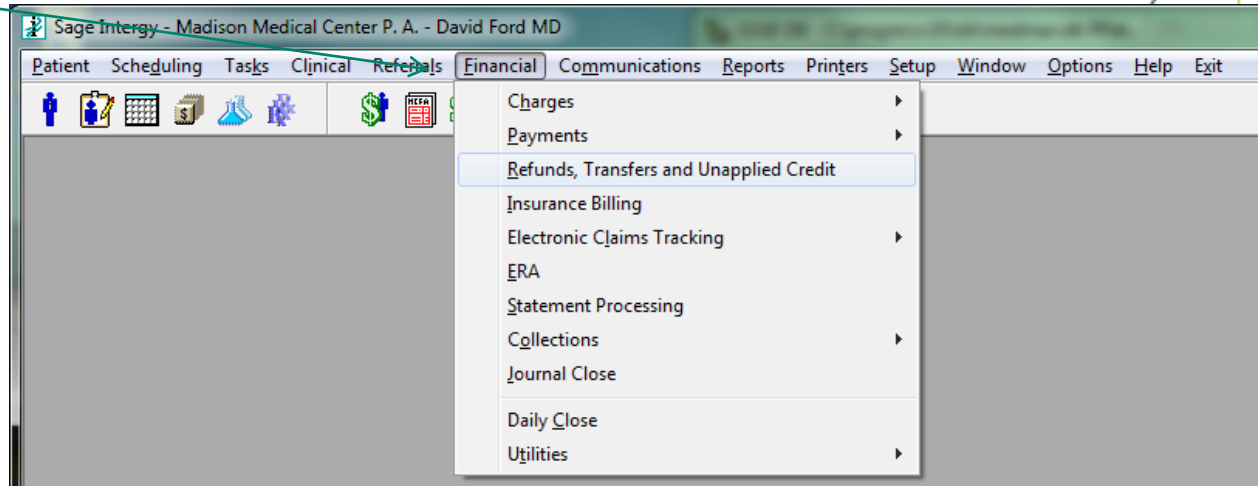
By	Payment History	Account	Patient	Provider	Amount
DF	Payment Posted	2		DF	12.00
DF	To Unapplied Credit				-12.00

Unallocated: **0.00**

Payment buttons: Edit, Void, Delete, Help, Close

# Processing Credit card Transactions – Refund Transaction

- (1) Go to Financial menu
- (2) Select Refunds, Transfers and Unapplied Credit
- (3) Select Transfers
- (4) Select Unapplied Credit



# Processing Credit card Transactions – Refund Transaction

- (1) Select the patient you posted the payment for
- (2) Click the OK button

Select Account for Existing Person

Accounts

Guarantor begins (L,F,M):

Guarantor  Account

Guarantor	Account	Address	City	Status	Class
Aaron, Alice B	2	318 Great Potomac Lake Drive	Madison	Active	STAND
Abdul, Isabelle R	9	12 Wayward Court	Madison	Active	STAND
Abner, Brian C	1	7418 NW 128th Street	Madison	Active	STAND
Arnold, Tracey A	12	123 Gosling Court	Madison	Active	STAND
Bavier, Francis	39	1475 Mayberry Way	Madison	Active	
Benson Manufacturing	814	765 Industrial Park Drive	Madison	Active	INDUS
Bethany, Terrence	51	608 Gaston Drive	Madison	Active	
Blur, Irma	23	208 Blind Corner Lane	Madison	Active	STAND
Bon Jovi, Valerie	33	67 Runway Circle	Madison	Active	
Borgnine, Ingrid	44	1387 Casablanca Lane	Madison	Active	

Details

OK

Cancel

# Processing Credit card Transactions – Refund Transaction

The Refunds, Transfers, and Unapplied Credit window will open, do the following:

- (1) In the Mode field Select “Refund”
- (2) In the Method field Select “Charge Card”
- (3) In the Code field Select relevant code
- (4) Find the Unapplied Credit (payment) you posted and enter a refund amount in the refund amount column in the browser.
- (5) Click the Post button

Account: 2 Account Balance: -765.99 General - 01/11/2008  
Guarantor: Alice B Aaron Total Unapplied Credit: 1,006.99

Mode: Refund Voucher: Code: POSTERR Reference Date: 01/11/2008  
Method: Charge Card Pay To: Aaron, Alice B Class:  
EDI Verify: Y

Unapplied Credit

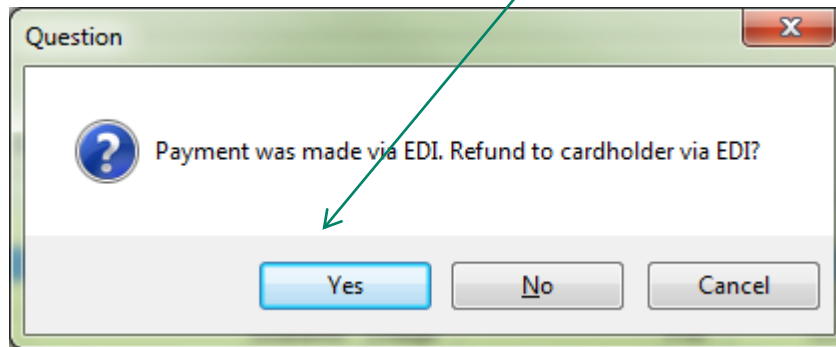
Provider begins:  Provider  Department  Patient  Payer  Include Fully Allocated

Posted	Provider	Dept	Patient	Payer	Method	Voucher	Type	Amount	Unallocated	Refund
12/14/07	DF		Alice B Aaron	BCBS01	Check	BCB88453118	Pmt	3.00	3.00	
01/11/08	DF			Guarantor	Charge		Pmt	12.00	12.00	12.00
01/11/08	DF			Guarantor	Charge		Pmt	12.00	12.00	0.00
01/11/08	DF		Alice B Aaron	Guarantor	Charge		Pmt	12.00	12.00	0.00
01/11/08	DF	08		Guarantor	Charge		Pmt	999.99	955.99	0.00
Totals:									1,006.99	12.00

View/Edit Reset Post Close

# Processing Credit card Transactions – Refund Transaction

The following message box will display. Click the YES button.



# Processing Credit card Transactions – Refund Transaction

The Sage Exchange Module will display to complete the refund.

# Supported Hardware and Operating Systems

At present, 3 types of hardware are supported by Intergy:



Clear text wedge readers: These readers are plug-and-play and connect into your USB port. Your computer reads the track data as clear text and makes it available to Sage Exchange to process. Although Sage Exchange is taking precautions with the data once it receives it, clear text readers are not safe to use and the data is stored in the computers clipboard until you turn off your computer or purge the clipboard's memory. We support clear text readers because they are abundant, but our customer support group will only process orders for encrypted readers when new requests are received. Sage Payment Solutions is committed to not only protecting cardholder data, but ensuring we help our merchant customers safeguard the data and avoid a costly breach.



Magtek Centurion encrypted wedge reader: These readers are also plug-and-play and connect into your USB port. The difference is that the data is encrypted through to Sage Exchange and is not readable anywhere on your computer. Sage Exchange has the key to decrypt the information and process the transaction safely. If you only need the ability to swipe cards, and do so safely, this is an inexpensive means to do so.



## Supported Hardware and Operating Systems (Cont'd)

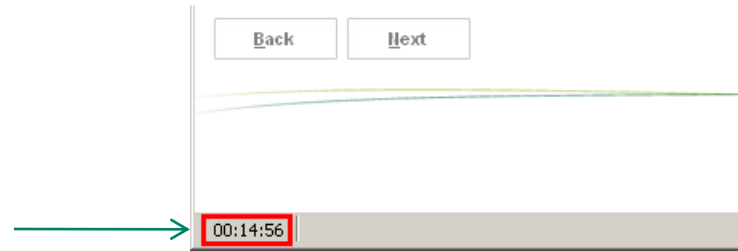


Ingenico i3070: These readers are also plug-and-play and connect into your USB port. That said, they will require the installation of a dll file for your operating system to “recognize” it. Once the dll is installed, it will appear as an option in your Sage Exchange Settings (see The Sage Exchange Tool Tray section of this document for more information). This unit is capable of processing PIN transactions, card swipe and (in Canada early 2011) EMV/smart card transactions.

**Sage Exchange only supports Microsoft operating systems XP and above.**

## Sage Exchange Time Out

In compliance with PA-DSS, once you open a Sage Exchange window to process a request (payment, view/update a credit card), the system will begin a countdown from 15 minutes.



If you have not closed the window, after 15 minutes it will close automatically. This includes if you have entered information into the screen and have left it for longer than 15 minutes. If this happens you will need to re-enter the information—the system will not retain any memory of what you were doing previously.

## The Sage Exchange Tool Tray

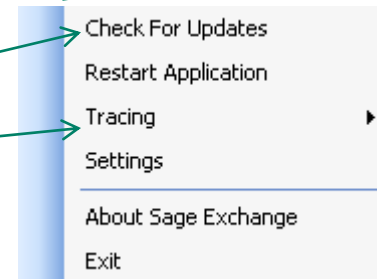
In the bottom right of your computer screen (the tool tray) you will see a “SE” symbol when Sage Exchange is running.



To access the Sage Exchange Settings, right click (or double click) the SE icon:

If you select “Check for Updates” Sage Exchange will do just that and if they are available you will be asked if you want to install them.

If you are having problems processing credit card transactions, you may also select “Restart Application” as part of your troubleshooting.



Tracing – is a logging system that creates a log file of the events that occur within the Sage Exchange application. This log file can be used by support to identify and resolve issues with the Sage Exchange application.

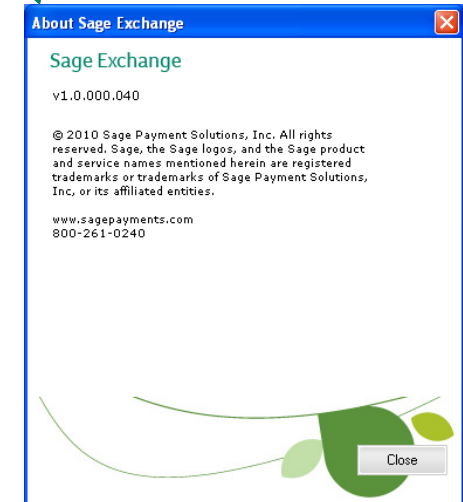
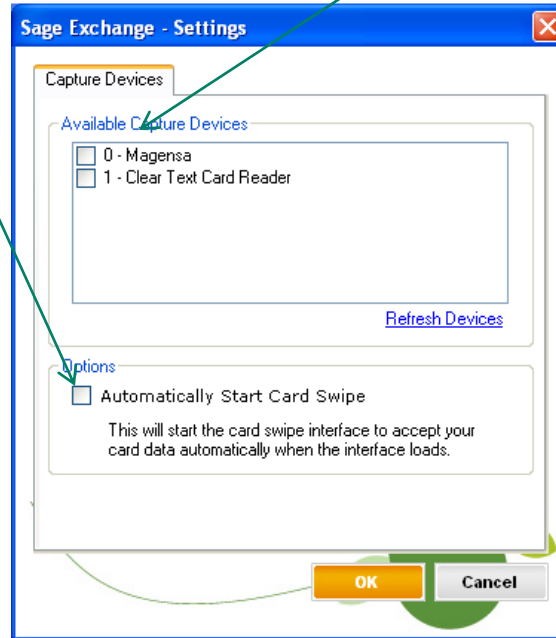
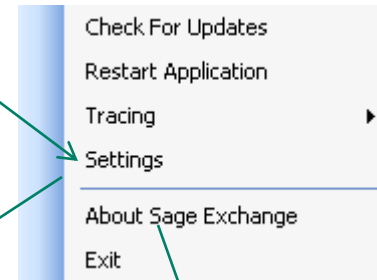
**NOTE: The Sage Exchange module is tied to your windows login. Once you log out, if a new user logs in that has not used Sage Exchange before, they will be required to install the Sage Exchange Module.**

## The Sage Exchange Tool Tray (Cont'd)

If you select Settings, you will have the opportunity to select your default card swipe device (see Support Hardware section of this document for supported hardware).

You will also be able to automatically default Sage Exchange to look for a swiped card (instead of having to select "Swipe Card" in the pop-up window every time).

**NOTE:** To turn this feature off simply return to the Settings tab and de-select the option.



# Minimum System Requirements

When configured to the latest security and operability standards, the following server operating systems may receive a Sage Intergy component installation:

- Microsoft Windows Server 2008 Standard Edition or higher (64-bit or 32-bit editions)
- Microsoft Windows Server 2008 R2 Standard Edition or higher (64-bit or 32-bit editions)
- Microsoft Windows Server 2003 Standard Edition Service Pack 1 or higher (32-bit edition only)
- Microsoft Windows Server 2003 R2 Standard Edition Service Pack 1 or higher (32-bit edition only)

IBM AIX is not eligible for use as a Sage Intergy 6.00 database server. All Sage Intergy 6.00 installations and upgrades must have a compatible Microsoft Windows server operating system for the primary Sage Intergy database server.

For all compatible version of Microsoft Windows, the Windows Server Enterprise Edition may also be implemented for servers which require more than 5 GB of physical RAM. When installing servers, note that licensing may be based on the number of processors in use. Some operating system versions may require additional licensing based on the number of physical processors, or the number of processor cores. Please refer to the Microsoft documentation at

<http://www.microsoft.com/licensing/highlights/multicore.mspx> for more information.

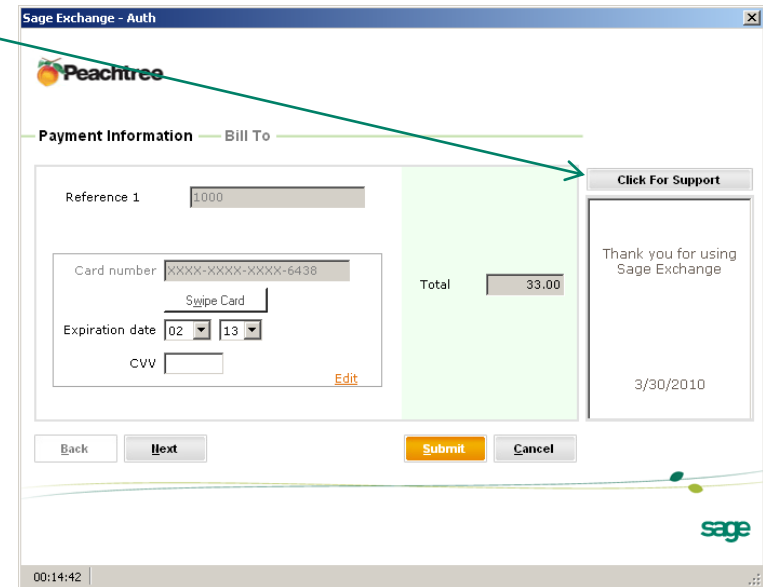
# Customer Support

If you are in need of merchant support or are having issues with the storage-only account, you may call 1-800-261-0240 between 8:00 a.m. and 8:00 p.m. EST, Monday through Friday.

If you are in Sage Exchange, you may also select “Click for Support.” You will be directed to the Sage Payment Solutions support webpage ([www.sagepayments.com](http://www.sagepayments.com)).

You will have access to a knowledge database to search for documentation; chat (if you do not wish to speak with a customer support representative); you may submit a ticket to request your issue be researched; or you may access our community forums area to communicate with/learn from other merchants.

Whether you are a Sage Payment Solutions merchant or not, we appreciate that you chose Sage Intergrity and we are here to serve you.



The screenshot shows a web browser window titled "Sage Exchange - Auth" with the Peachtree logo. The page is a payment form with the following elements:

- Payment Information** tab selected, with a "Bill To" link.
- Reference 1: 1000
- Card number: XXXX-XXXX-XXXX-6438
- Swipe Card button
- Expiration date: 02 / 13
- CVV: [input field]
- Total: 33.00
- Buttons: Back, Next, Submit, Cancel
- Footer: sage logo and 00:14:42

A "Click For Support" button is located on the right side of the form, highlighted with a green arrow. A pop-up window is visible over this button with the text: "Thank you for using Sage Exchange" and "3/30/2010".

Sage Payment Solutions

Sage Exchange



## Frequently Asked Questions (FAQ's)

### **I'm not a Sage Payment Solutions merchant. Can I still process my credit card transactions through Intergy?**

Possibly. Sage Payment Solutions offers a processor switch service (.XX cents per transaction) which will provide a Merchant ID and Merchant Key you can use in Intergy to “forward” transactions to your processor on your behalf. Authorization information received back is then integrated back into your customer record. For more information on supported processors and the process for applying for a processor switch account, please see the “Not Processing Through Intergy Payment Processing” section of this document.

## Frequently Asked Questions (FAQ's) – Cont'd

**I currently have a storage-only account within Intergy where I can store and retrieve my customers credit card numbers safely, but I want to start processing transactions directly in Intergy– what do I do?**

Contact the Intergy Payment Services number under the Services tab in the main menu. Let them know that you currently have a storage-only account and provide the Merchant Key and Merchant ID. If you will be processing with Sage Payment Solutions, the representative will ensure that you ensure your current Merchant Key and Merchant ID are not changed, which will mean you can still access all of your customers card numbers. If you will be processing through another provider, please follow the instructions in the “Not Processing Through Intergy Payment Processing” section of this guide. Be sure to mark on the application that you have a current storage-only account and provide the Merchant Key and Merchant ID.

**I entered information into my payment window and then got distracted. When I returned, the window I had typed into was gone. Where did it go?**

Any Sage Exchange window is subject to a PCI 15 minute requirement. If you enter information into a Sage Exchange window that collects or presents credit card information and leave it , after 15 minutes it will close automatically. If you had entered something into the screen all information is lost and you must start what you were doing all over again. This is for the safety of cardholder information and protects you too as the merchant.



## Frequently Asked Questions (FAQ's) – Cont'd

**I almost always have the customers card to process transactions, but I don't want to have to press "Swipe Card" every time I process a payment. What can I do?**

Review the contents of the "The Sage Exchange Tool Tray" section of this document as it relates to Settings. There is an option for Sage Exchange to always look for a swiped card.

**Sometimes I don't have the card to swipe – what do I do if the system is looking for a swiped card and I have to manually enter it?**

Simply select "Cancel" on the swipe card request and you can then enter the credit card information manually into the payment window.

# Troubleshooting

## I get an error message when I attempt to process credit card transactions:

1. Check to see if the “SE” symbol is visible in the bottom right tray (where you time/date are located).
2. If not, perform a CNTL + ALT + DELETE and under processes verify whether the SageExchange.exe process is running.
3. If not, select “Start” and then “All Programs” and then “Sage Payment Solutions.” You may then select Sage Exchange and the service will restart.
4. If Sage Exchange is not under “All Programs,” it may have been removed. To reinstall the application, go to the following URL to download it:  
<https://www.sageexchange.com/install/frminstall.aspx>
5. If Sage Exchange is running, right click on the SE icon in your tool tray (lower right of your computer screen) and select “Restart Application.”
6. If the above does not correct the problem, contact Customer Support at 1-800-261-0240.

## My system is blocking McAfee Security. How do I correct this?

1. In McAfee Personal Firewall, Select **Personal Firewall Plus**.
2. Click **View the Internet Application List**.
3. Right-click the name of the program you wish to allow (sageexchange.exe) and select **Allow Full Access**.

*If you don't see the name of the program listed, click **Allow New Application** and enter the full path of where the application is loaded. Example: **C:\Program Files\AOL Instant Messenger\aim.exe***

4. Close McAfee Personal Firewall.

Sage Payment Solutions

Sage Exchange



# Troubleshooting

## My system is blocking Norton. How do I correct this?

1. When sageexchange.exe tries to access the internet from your computer, Norton Internet Security gives a prompt, which has options to allow or block the access. Many times the **recommended option is to block the access** but you will want to enable it for sageexchange.exe in order to process your credit card transactions.. So be careful to see what you are blocking internet access before clicking OK.
2. Click the Norton Security icon at the bottom right corner in your system tray. On the pop up window, first check if you have not clicked “**Block Traffic**” button. As this will block all internet access.
3. If that is ok, maybe the program has been blocked access and has to be **unblocked manually**. Go to *Norton Internet Security > System and Settings* and this is what you see in the image below.
4. Then you see that the Personal firewall is turned on to protect from unauthorized access to spyware, adware and other unwanted software. Click “**Configure**” button.
5. Go to Programs and scroll down the list for **Manual Program Control**. There you will see the individual internet access settings for each individual program. And you will see that the sageexchange.exe setting shows “Block All”.
6. From the drop down list select “**Permit All**” and now open sageexchange.exe. It works!
7. Now you may also scroll through the entire list and individually set the programs to allow and **block internet access**. Now you may also fix some programs not working with the internet which you might have blocked by mistake. You can also set some allowed programs to block.

**NOTE:** The ability to perform this function may require an administrator.

## Troubleshooting

**I share my computer with someone else. When I logged out and they logged in and attempted to process credit card transactions in Intergy they couldn't. What's wrong?.**

Sage Exchange is tied to the windows login. Once you log out and another user logs in they must install Sage Exchange for themselves which will be tied to their windows login account as well.