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Payment Center Overview

The **Payment Center** allows you to enter client payments, create a payment plan, and issue a refund. From the Payment Center, you can also view the client's payment history, as well as any active payment plans.

Add User Permissions for Payment Center

1. Click **Maintain Users** in the Navigation Menu.
2. Click the **Edit Users** button.
3. Select a user from the **Select Login Name** or **Select Real Name** drop-down menus.
4. Click the **Edit User** button.
5. Scroll down to the **Swerve Pay Permissions** section.
6. To give a user a Payment Center permission select the checkbox for that permission:
 - **Refund Payments:** Gives the user the ability to refund payments made by the client.
 - **Add Recurring Payments:** Gives the user the ability to set up a payment plan for the client.
 - **Stop Recurring Payments:** Gives the user the ability to stop a payment plan.**Note:** Deselect the checkbox for a permission if you wish to remove access for the user.
7. After selecting the permissions, click the **Update** button.

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Enter a Client Payment

1. Navigate to the Payment Center: **Admissions > Payment Center**.
2. Search for and select the client.
3. Select the **appointment** you want to apply the payment to from the window on the left.
Note: If you are not using Scheduler integration, skip this step.
4. The amount to be collected for the appointment will be automatically filled in the **Payment Amount** field.

Note: If you are not using Scheduler integration, you will need to type in the amount here.

5. The **Payment Date** will automatically populate with the date of the selected appointment.

Note: If you are not using Schedule Integration, select or enter the payment date.

6. Choose the **Payment Method** from the following:

- **Cash**
- **Check**
- **Credit/Debit:**
 - a. **Name on card:** Enter the name on the card for recording purposes.
 - b. **Save Card?:** Click the checkbox to save the card.
- **Saved Card:** If there is a saved card for the client, you can select it from the drop-down menu.

7. Fill out the following fields if they are applicable to your Agency:


- **Location:** Select a Location to apply the payment to from the drop-down menu.
- **Agency:** Select an Agency to apply the payment to from the drop-down menu. This payment is displayed for the Agency within the Billing Engine.
- **Categories:** Select the Category for the payment from the drop-down menu.
- *(Optional)* **Note:** Enter any notes about the payment.

8. **Reference Number:**

- If you entered a Cash or Check payment, enter a Reference number as desired.
- If you entered a Credit/Debit payment, the Reference number is automatically provided and filled in after the transaction completes.

9. The **Action** Payment/Charge radio is selected.

10. If you are using a new card (Credit/Debit Payment Method), complete one of the following options:

- **Swipe Card:** Click this button to swipe the card into the system. If you selected the checkbox next to Save card? above, the card will be saved to this client for any future payments.
- **Key Card:** If the card cannot be physically swiped, click this button to manually enter the card information on the external validation form. When completed, you may have to click the **Refresh**  button next to Payment Method in order for the card details to appear in the drop-down menu.

11. Click the **Submit Payment** button.

Note: This button will only become active when all fields and processes have been completed.

12. A confirmation will appear. Click **Yes, Submit Payment**.

Note: You can click No, Cancel Payment to return to the payment screen.

13. The payment history can be viewed by clicking on an appointment in the appointment window for that client.

Note: If you are not using Scheduler integration, the payment will appear in the **Payment History** grid at the bottom of the screen.

Payment History							
#	Pay Date	Amount	Method	Reference #	Type	Note	
1	6/2/2021	\$100.00	CASH		Sale		

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Create a Payment Plan

1. Complete steps 1-9 in [Enter a Client Payment](#).
2. In the Action section, select the **Payment Plan** radio button.
3. Click the **Setup Payment Plan...** button.
4. In the Payment Recurrence window, complete the following fields:
 - **Start Collection On:** Enter the date you want to start collecting recurring payments on.
 - **Charge:** Enter how much to charge on each recurring date.
Note: Minimum charge is \$1.00. If you enter \$0.50, it will round up to \$1.00.
 - **Collect Every:** Set the recurring change pattern from the drop-down menu:
 - **Weekly:** Specify day of each week.
 - **Month (Relative):** Relative date each month (e.g. The 3rd Thursday of the month).
 - **Month (Specific):** Specific, numbered calendar day of the month.
 - **On:** Select the interval of the recurring charge pattern that was chosen. The wording for the field depends on your Collect Every selection.
 - **Total Charges:** Enter the total amount to be collected for the entirety payment plan.
 - **Use Card:** If the client already has a credit or debit card in the system, it will automatically be selected here. Click the drop-down menu and select **Credit/Debit** if the client wants to use another card. The two options below are displayed:
 - **Swipe Card:** If the card being used is not on file, click this button to swipe the card into the system.
 - **Key Card:** If the card cannot be physically swiped, click this button and follow the steps to manually enter the card information above.
 - **Collect Today:** Enter the amount to be collected when the plan is created today. The payment will be applied to the Total Charge balance.

- **Name on Card:** Enter the name on the card for documentation purposes.
 - *(Optional)* fields (depending on if these are enabled for your Agency):
 - **Location:** Select a location to apply the payment plan to.
 - **Agency:** Select an Agency to apply the payment plan to. This payment is displayed for the Agency within the Billing Engine.
 - **Category:** Select the Category for the payment from the drop-down menu.
5. Click the **Preview Schedule** to view the payment schedule in order to verify that the plan is going to charge as expected. If you entered an amount in Collect Today, that will appear as the first charge.
 6. Click the **Submit** button. If the Collect Today field has an amount entered, this will charge the supplied payment method that amount.
 7. The Payment Schedule is displayed in the **Active Payment Plans** grid at the bottom of the screen, with the following information about the plan:
 - **Total Charge:** The total amount to be collected at the end of the payment plan.
 - **Remaining:** How much is left to collect on the payment plan.
 - **Next Charge Amount:** What the client will be charged at the next scheduled payment.
 - **Next Charge Date:** The next date the client will be charged.
 - **Last Charge Date:** The date the client was last charged.
 8. Click the **plus sign (+)** next to the payment plan. Details are displayed such as the card used and the interval for the charges.
 9. If you need to cancel the payment plan and have the permission to do so, click the **Stop Plan** button.
- Note:** The payment plan cannot be edited once submitted. You must click Stop Plan, then create a new payment plan if you need to edit.

Active Payment Plans					
	Total Charg...	Remaining	Next Charge Amount	Next Charge Date	Last Charg...
<input type="checkbox"/> Stop Plan	\$5.00	\$5.00	\$1.00	6/13/2021	

Card ending in: Interval:

Occurrence: Location:

Category:

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Refund a Payment

In order for you to issue a refund through the Payment Center, you need to have the **Refund Payments** permission selected in Maintain Users.

Refund a Payment: Agency With Scheduler Integration

1. Navigate to the Payment Center: **Admissions > Payment Center**.
2. Search for the client.
3. An appointment list is displayed showing a history of the selected client's appointments. Select an appointment that you have collected payment for from the list and click the **Refund Payment** button.
4. In the Confirm Refund window, click the **Yes, Initiate Refund** button.
5. A Refund Submitted pop-up is displayed, click **OK**. The Collected column for the refunded appointment is now displayed as \$0.00. The appointment in the Scheduler also displays that this payment has been refunded under the Note section.

Refund a Payment: Agency Not Integrated With Scheduler

1. Navigate to the Payment Center: **Admissions > Payment Center**.
2. Search for the client.
3. The **Payment History** table displays previous payments from the client.
4. Select the sale transaction from the Payment History table that you want to refund.
5. In the Confirm Refund window, click the **Yes, Initiate Refund** button.
6. A pop-up is displayed, "Refund Submitted." Click **OK**. An entry is created in Payment History indicating the refund.