

Payment Solutions for Service Providers
User Manual Addendum for Elixir Users

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Post Nexion Installation

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Setting up Nexion on Elixir

The following steps must be completed to enable communication between Elixir and Nexion.

A.) Enabling the Nexion application on Mede Mass- Elixir.

1.) From the main menu select the "System" option and then select "System options" from the system submenu.

elixir registered to DEMO DATA SET 1 / User: Administrator [C:\Elixir\SQL\MDLDATA.FDB]						
File Reports Tools EDI	System Help	_				
You need proper backups	About Apply default column settings	MEDICAL	PRACTICE	TARIFF	MEDICINE	STOCK
	Practice details setup Advanced options					
	System options 3rd party setup					
	NUSQL system					

2.) The "Elixir system options" screen is now displayed. Click on the (A) "Electronic card payment options" tab and then click on (B) the "Nexion" tab.

<i>e</i> Elixir system options		A
Diary options Dispensing preference: Electronic card payment options ACS Nexion General	s EDI options Electronic card payment options annotal geriods Intelica Printing control codes Printing prefere ()	В
Nexion		
Keypad active:	c:Program FilesWexion	
Merchant ID:	1234	D
		E
Accept Ext		F

- 3.) Click in the "Keypad active" (C) check box so that a tick appears. This enables the Nexion electronic card payment terminal.
- 4.) Ensure that the "Installation path" (D) is C:\nexion3/Standalone
- 5.) Enter the Merchant Number in the Merchant ID field (E). The Merchant ID will be supplied by Nexion. Nexion Call Centre on 0861 NEXION (639 466) In order to obtain your Merchant number.
- 6.) Once All fields have been completed click on the Accept button (F) to save changes.

B.) <u>Setting Elixir credit codes to operate the Nexion application</u>

The Elixir transaction credit code must be setup. Please do the following:

1.) From the Elixir main menu select "File" option.

Blixir registered to DE	MO DATA SET 1 / User: Administrator [C:\Elixir\SQL\MDLDATA.FDB]	
File Reports Tools EDI S	ystem Help	
Accounts	or MED-e-MASS (Pty) Ltd regional office	
Automation	N CLINICAL FINANCIAL MEDICAL PRACTICE TARIFF MEDICINE	STOCK
Clinical		
Datasets/Users		
Financial		
Medical funds		
Medicine		
Practice		
Stock		
Tariffs		
Log out		
Select dataset Ctrl+F1		
Exit		

2.) From the "File" sub-menu select the "Financial" option.

elixir registered to DEMO DATA SET 1 / User: Administrator [C:\Elixir\SQL\MDLDATA.FDB]							
File Reports Tools ED	DI System Help						
Remember to backup regu	ılarly						
ACCOUNTS AUTO	MATION CLINICAL FINANCIAL MEDIC	CAL PRACTICE TARIFF MEDICINE	STOCK				
Elixir practice fin	ancial properties						
<u>C</u> redititem De <u>b</u> ititem	Ledgers Tax rates		Credit item				
Internal financial cre	dit items		Grout term				
Your code BHF cod	e Afrikaans description	English description					
M-ELEC	BETALING ONTVANG: ELEKTRONIES	PAYMENT RECEIVED: ELECTRONIC					
P-CASH	BETALING ONTVANG: PASIENT KONTANT	PAYMENT RECEIVED: PATIENT CASH					
P-CARD	BETALING ONTVANG: PASIENT KREDIETKAART	PAYMENT RECEIVED: PATIENT CREDIT CAR	Olnsert				
P-CHEQ	BETALING ONTVANG: PASIENT TJEK	PAYMENT RECEIVED: PATIENT CHEQUE					
M-CHEQ	BETALING ONTVANG: TJEK	PAYMENT RECEIVED: CHEQUE	Delete				
P-ELEC	BETALING PASIENT : ELEKTRONIES	PAYMENT PATIENT : ELECTRONIC	<u> </u>				
DISCOUNT	KORTING TOEGESTAAN	DISCOUNT APPLIED	🚕 <u>P</u> rint				
CT JOURNAL	KREDIETJOERNAAL: DEBIET AFGEHAAL	CREDIT JOURNAL: DEBIT REMOVED	[👔 Di <u>a</u> ry				
AUTOCREDIT	REGSTELLINGSKREDIET	CORRECTIONAL CREDIT					
BAD DEBT	SKULD AFGESKRYF	DEBT WRITTEN OFF					
		✓	·				
		2					
P-ELEC DISCOUNT CT JOURNAL AUTOCREDIT BAD DEBT	BETALING ONLYANG, IGER BETALING PASIENT : ELEKTRONIES KORTING TOEGESTAAN KREDIETJOERNAAL: DEBIET AFGEHAAL REGSTELLINGSKREDIET SKULD AFGESKRYF	PAYMENT RACEIVED. CHESUE	Edit Print Diary				

3.) Select the "Credit item" tab and double click on the "P-Card" code to edit the payment code properties.

Please Note:

In Order to record Card Transactions through Nexion, The Merchant concerned must be activated for this functionality. Please contact The Nexion Technical Centre on 0861 NEXION 639 466. Once activated, repeat steps 2-9 using the **"P-CARD"** Credit Item.

(2 Elixir credit code t	ype editor 🛛 💽 🔀		4
	Credit code type deta	ils		_
	Your co <u>d</u> e:	P-CARD		3
	Pu <u>b</u> lished code:		(2
	Afrikaans description:	Betaling ontvang: Pasient kredietkaart	-	
	English description:	Payment received: Patient credit card		5
	Ledger account:			_
	🦳 Medical fund as sou	rce 🔽 Enable bank terminal 🚽		Ξ
	🔲 Journal item	Receipt printing		_
	🔲 Bad debt			
	🔲 Discount item			G
	Accept	E <u>x</u> it		

- 4.) Enter the Credit Card Code you would like to use when processing a Credit Card Payment on Nexion in the **"Your code"** (A) field i.e. P-Card or Nexion-Credit Card
- 5.) Enter the Published code supplied by the Mede Mass installer in the "**Published code:**" field (B)
- 6.) Enter a Description for the payment type in English or Afrikaans in the fields (C) & (D).
- 7.) In the "Ledger account" field select "BANK ACCOUNT: PATIENT PAYMENTS" from the drop down menu (E).
- 8.) Click the "Enable bank Terminal" checkbox, (F) a tick appears.
- 9.) Click the "**Receipt printing**" checkbox, (G) a tick appears.

PLEASE NOTE:

The Receipt Printing option must be selected as you are required to print two receipts for any Credit Card Transaction. A signed copy of the Receipt must be retained by the merchant in case of a chargeback by the bank. The second copy is given to the patient as proof of payment.

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Transacting with Nexion

There are 2 methods of processing Payments through Nexion.

A. Payments originating from Mede Mass - Elixir

<u>B.</u> Payments originating from Nexion Standalone.

(In order to process patient payments NOT registered on Elixir).

Please Note:

Only Credit Codes that are linked to Nexion will be automatically reconciled to Elixir upon processing. Please refer to "Setting Elixir credit codes to operate the Nexion application" the correct codes.

A. <u>Payments originating from Mede Mass - Elixir.</u>

- 1.1) Select the "Accounts" tab (A). The Elixir accounts window will now be displayed.
- 1.2) From the "Accounts" sub window select the Patient (B) you wish to process a payment for.
- 1.3) Once the Patient is highlighted, select the "**Transactions**" button **(C)** to begin processing the transaction.



1.4) The Elixir account transactions screen is now displayed:

	Credit Cre	ditall Re⊻e	rse Mov	e up Move do <u>w</u> n 🖺	De <u>t</u> ails S	Script Scrip	t <u>h</u> istory Im	port Redis	tri <u>b</u> ute		١
ransactio	ns	,									0
ated	Your code	Indicators	Units D	ependent	Tooth[Teeth] Desc	ription		^	Ê.	
0/07/2007	P-CASH		1			PAY	MENT RECEIV	ED: PATIENT	CASH	0 In	sert
30/07/2007	P-CARD		1			PAY	MENT RECEIV	ED: PATIENT	CREDIT C		elete
30/07/2007	P-CARD		1			PAY	MENT RECEIV	ED: PATIENT	CREDIT C		Enlit
31/07/2007	0190		1 0	ERICK: 26/08/1957		New	and establis	hed patient: (Consultatio		
31/07/2007	0190		1 0	ERICK: 26/08/1957		New	and establis	hed patient: (Consultatio	E Series	Print
31/07/2007	P-CARD		1			PAY	MENT RECEIV	ED: PATIENT	CREDIT C		one
01/08/2007	P-CARD		1			PAY	MENT RECEIV	ED: PATIENT	CREDIT C	Di	i <u>a</u> ry
4/08/2007	P-CARD		1			PAY	MENT RECEIV	ED: PATIENT	CREDIT C		
									~	All rt	ems
									>		
omment:											
ommorit.	1										
)iagnosis											
Code	Descriptio	on			^		Finan <u>cia</u>	l analysis			
						All due:	R 423 14	60 days:	R 0.00		
						Current:	R 0.00	90 days:	R 0.00		
) 0.			

1.5) Click the "Credit" button (A) to begin entering the payment information on the following screen.

elixir credit entry for account: 00001 / MI	R.D.J.COETZEE [Medical: PRI	VATE MEDICAL AID / 123]	
Payment details	Allocation Allocated: R n nn	Analysis Amount due: R 423.14	
Amount: R100.20	Due analysis	Current: R 0.00 30 days: R 0.00	в
Document: Test 20 Aug 07	Medical due: R 423.14	90 and over: R 0.00	
Date Your code Amount Prior pai	d Due Now payment	Medical liable Patient liable Units Dependent I	С
Accept Ago Ali clear O Gear	Maximum Exit		D

- 1.6) Enter the amount **(A)** to be processed
- 1.7) Select the Payment type **(B)** from the "**Type**" drop down selection box.
- 1.8) Enter the Document Information (C), used to reference the transaction within Elixir.
- 1.9) Once all fields have been completed Click "Accept" (D) to continue.

The following confirmation box will be displayed, click "Accept" to continue without any change or click "Cancel" to amend transaction details

Elixir: Credit not fully allocated	? 🛛
Reason Continue with processing? Warning!	
Accept Cancel	

1.10) The Following screen will confirm the Transaction details. Please check the box next to, "**Please** confirm your entries:" Once your information is confirmed click the "**Process**" button.

@ E	lixir card payment						
Car	Card payment details						
	Receipt Nr. Test 20 Aug 07						
	Amount:	100.20					
	Rounding:	0.00					
	Due:	100.20					
	Tender:	100.20					
	Change:	R 0.00					
	Perform a manual	transaction:					
Please confirm your entries:							
	≫ <u>P</u> rocess © E <u>x</u> it						

At this Point the Nexion Payments Screen will be displayed please select either:

- 1. Record Cash Trxn and follow the Instruction (Cash Transactions) below.
- 2. Process Card Trxn and follow the Instruction (Credit\ Debit Card Transactions) below

The Nexion Payment Screen

	nxAge	ent version: 3.8.9.29 ++	A
nexion	Payment Details	Nexion SA Process Card	В
	Amount:	ZAR V Process Card (card not present)	С
Nexion fully functional	Transaction Ref#:	Process Cash or Cheque	D
	Member Ref#: User Ref#:	Process EFT to Bank Acc	E
Cancel	Bank Auth #:	Process Debit Order	F
			G



2. <u>Cash Transactions</u>

	nxAge	ent version: 3.8.9.29	N	↔
\frown	Payment Details		13	
nexion	Licensee:	Nexion SA	~	Process Card
	Amount:	Type in Amount ZA	R v	Process Card (card not present)
	Transaction Ref#:	Type in Transaction Ref		Process Cash or Cheque
Nexion fully functional	Member Ref#	Type in Member Ref		Process EFT to Bank Acc
	User Ref#: Bank Auth #:			Process Debit Order
<u>C</u> ancel				Process Pre-Auth

2.1) Click the "**Process Cash or Cheque**" button. At this point you will be prompted to select the cash payment type: Cash or Cheque



Select Cash tender Type

lease	select the type of cash payment below
ype :	Cash
	Cash

2.2) At this point a Cash receipt will be displayed. The preset number of cash receipts will also automatically be printed to your default printer

The Nexion Receipt

nxAgent version: 3.7.10.28				
<u>E</u> mail	Reprint Complete			
Successful Credit Card Transaction				
Merchant Unit 16, Block ysterplaat Cape Town	: Nexion SA 1, Northgate Island,			
License Date Username	: NEX7700N00010002 : 2013/10/30 13:42:53 :			
Card Payment Re	ceipt			
Trxn Ref Mem Ref Nexion Ref	: DEB 01820 : J Smith : 826497			
AuthId Merchant ID Terminal ID	: 348451 : 000002191901185 : 00001292			
Card Type Card #	: Credit : 5221*******1234			
Amount	: R 430.00			
I agree to pay this amount as per my cardholder agreement				
Cardholder Signature				
Powered by Nexion				

2.3) The receipt will print automatically to the default printer, click on "**Complete**". If the receipts did not print for any reason, click the "**Reprint**" button and a single receipt will be re-printed.

nxAgent version: 3.7	.10.28		1
Emal	Beprint	Complete	

The "Email "button allows the users to send the receipt via email to a specific email address .

Email To	E
Email Address	

3. <u>Credit & Debit Card Transactions</u>

	nxAge	ent version: 3.8.9.29	N	↔
	Payment Details		43	
nexion	Licensee:	Nexion SA	~	Process Card
	Amount:	Type in Amount	ZAR ∨	Process Card (card not present)
	Transaction Ref#:	Type in Transaction Ref		Process Cash or Cheque
Nexion fully functional	Member Ref#:	Type in Member Ref		Process EFT to Bank Acc
	User Ref#: Bank Auth #:			Process Debit Order
Cancel				Process Pre-Auth

3.1) Click the "**Process Card**" button.

Pr	oces	s Can	d

3.2) A screen will be displayed, prompting the user to swipe the card.

	3,5
Present card	

3.3) You will be prompted on the terminal to select an account type:

If the card is a Debit Card *
Confirm with Cardholder if the debit card is linked to a Cheque or Savings account.
Choose option #1 for Cheque or #2 for Savings
Refer to the LOGO on the card; Logo's with Visa Electron or Maestro are debit cards.

* In the case of a debit card your client will be prompted to enter their PIN on the terminal and to press Enter to confirm.

If the card is a **Credit Card**, the option to deduct an amount on a straight or budget facility is displayed on the terminal. If the client requests a budget option, select the number of months as prompted on the screen or select option 1 to continue. <u>Only available to cards activated for budget</u>. If in doubt refer to the LOGO on the card, Logos with Visa, Master Card, American Express or Diners Club are credit cards.

3.4) The terminal will now prompt you to re-confirm the transaction amount by pressing the green "**Green**" key on the paypoint terminal.

3.5) At this point the transaction will be processed and the result displayed on the terminal by means of an <u>Approved</u> or <u>Declined</u> message. Regardless of the outcome of the transaction the preset Number of receipts will automatically be printed to your default printer.

The Nexion Receipt

nxAgent version: 3.7.10.28			
<u>E</u> mail	Reprint	Complete	
Successful Cre	edit Card Trans	action	
Merchant	: Nexion SA		
Unit 16, Block	c 1, Nortngate .	Island,	
ysterpiaat Cape Town			
License	• NEX7700N000	10002	
Data	· 2013/10/30	13.42.53	
Username	:		
~ . ~			
Card Payment 1	Receipt		
Trxn Ref	: DEB 01820		
Mem Ref	: J Smith		
Nexion Ref	: 826497		
AuthId	: 348451		
Merchant ID	: 00000219190	1185	
Terminal ID	: 00001292		
Card Type	: Credit		
Card #	: 5221******	*1234	
Amount	: R 430.00		
1 agree to pay	y this amount a:	s per my	
cardiorder ag	Leement		
6 1 - 1			
Cardnolder			
Signature	•••••		
	rowered by Newlon		

3.5)1. The receipt will print automatically to the default printer, click on "**Complete**". If the receipts did not print for any reason, click the "**Reprint**" button and a single receipt will be re-printed.

nxAgent version: 3.7	.10.28	1
Emal	Beprint	Complete

For any queries regarding Nexion please call our Call Centre on

0861 639 466