



Cash flow management. Solved.

MANAGE PAYMENT LINKS

MANAGE WEB PAYMENT LINKS SENT

USER GUIDE

What is MANAGE PAYMENT LINKS?

➤ A tool to view, monitor, and manage payment links sent.

When to use it?

1. Check detail of payment link sent.
2. Check status of payment links status options are: **SENT, PAID, POSTED, DEACTIVATE** or **SCHEDULED**.
3. Manage payment links such as:
 1. Deactivate payment links – Patient paid by other means.
 2. Stop reminders – Patient did not pay yet but does not want reminder.
 3. Open link in browser – Assist a patient.

❖ To **SEND** a web payment link click here: <https://www.nexion.co.za/wp-content/uploads/2020/06/Web-Link-Standalone-User-Guide-FINAL-v20210312.pdf>

❖ To **POST** a web payment link click here: <https://www.nexion.co.za/wp-content/uploads/2020/06/Post-Web-Link- -User-Guide-v202102.pdf>

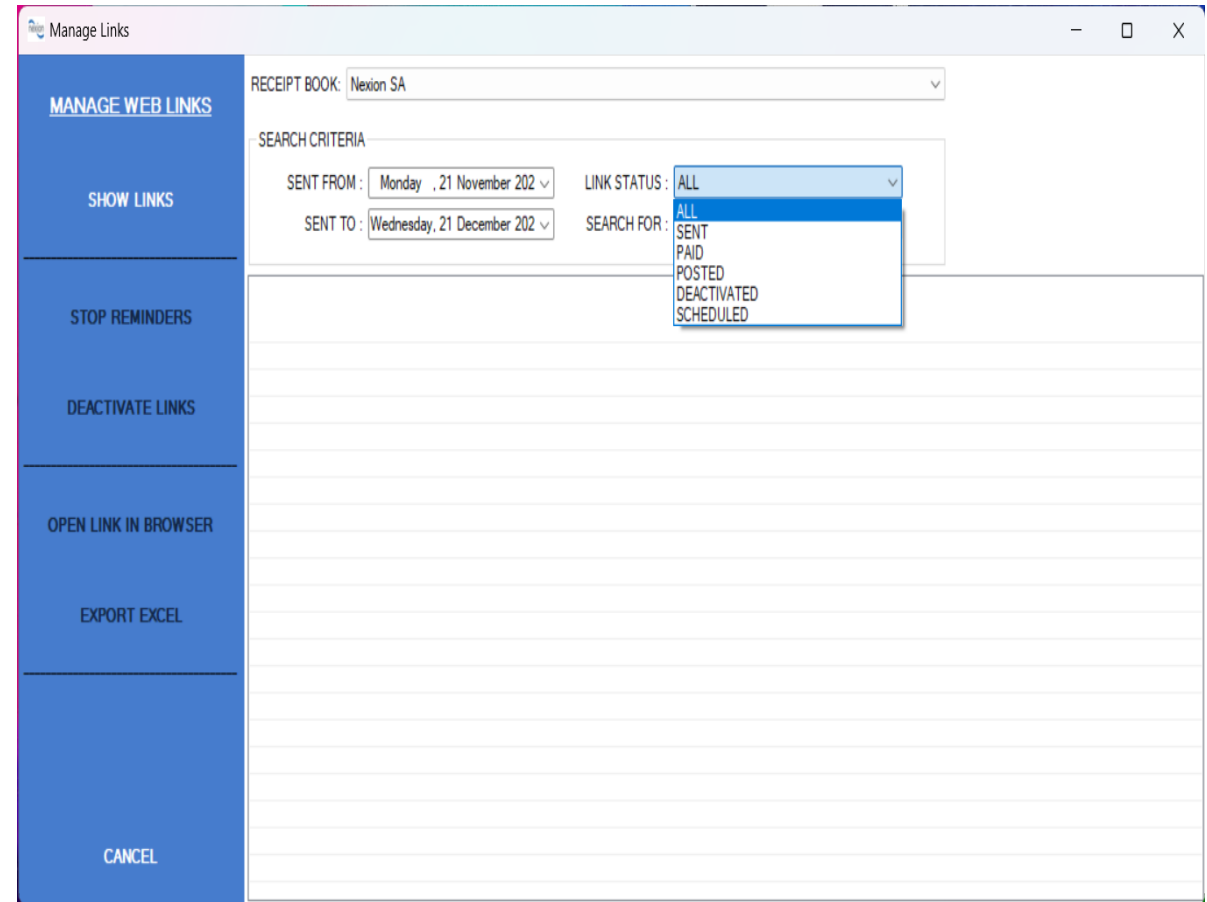
FIND PAYMENT LINK YOU WANT TO MANAGE OR VIEW

1. Click on DEBT COLLECTION.
2. Click on WEB PAYMENT LINKS.
3. Click on MANAGE LINKS.



FILTER TO FIND PAYMENT LINKS YOU WANT TO MANAGE

- Select RECEIPT BOOK.
- Select DATE RANGE.
Date defaults to last 30 days.
- Select LINK STATUS to search by:
 - All – View all links within date selection.
 - SENT – Links sent but not paid yet.
 - PAID – View all successfully paid links.
 - POSTED – View all links posted to billing system using integration.
 - DEACTIVATED – View all deactivated links.
 - SCHEDULED – View all future dated links.
- Click on SHOW LINKS to view payment links by search criteria.



SELECT LINK YOU WANT TO ACTION & SELECT ACTION

1. Tick box next to link you want to action, and select action to be taken:

- **STOP REMINDERS** to stop automated 72-hour reminder email.
- **DEACTIVATE LINKS** to deactivate a payment link but (only for **SENT** or **SCHEDULED** links)
- **OPEN LINK IN BROWSER** allows you to view link in your web browser to guide patients when needed.
- **EXPORT EXCEL** allows you to export list of selected payment links to Excel.

2. **CANCEL** to close Manage Web Links screen.

➤ **REMINDER** column indicates 72-hour reminder is active:

- 1 is active
- 0 is not active

ID	REM	STATUS	AMOUNT	ACC & PT.NAME	RESP CODE	RESP TEXT	SENT DATE	PROC
<input checked="" type="checkbox"/>	0	SENT	10.00	123test - C Marcus			2021/03/02 14:17:04	
<input type="checkbox"/>	0	SENT	2000.00	Debichack Tester - 11552			2021/03/01 09:57:59	2021/
<input type="checkbox"/>	0	SENT	10.00	156 - Test			2021/02/27 19:51:40	
<input type="checkbox"/>	0	SENT	10.00	123 - test			2021/02/27 19:41:05	
<input type="checkbox"/>	0	SENT	1500.00	00429 MR N. Botha - 11552			2021/02/26 13:43:41	
<input type="checkbox"/>	0	SENT	15.00	00429 MR N. Botha - 11552			2021/02/26 11:38:50	2021/
<input type="checkbox"/>	0	POSTED	10.00	00429 MR N. Botha - 11552	00	Successful	2021/02/24 13:41:32	2021/
<input type="checkbox"/>	0	POSTED	10.00	00429 MR N. Botha - 11552	00		2021/02/24 10:20:33	2021/
<input type="checkbox"/>	1	PAID	10.00	test - S Miller	00		2021/02/24 09:52:17	2021/
<input type="checkbox"/>	0	SENT	10.00	00429 MR N. Botha - 11552	06	Error	2021/02/24 09:43:12	2021/
<input type="checkbox"/>	1	DEACTIVATED	4500.00	458965 - Miller			2021/02/23 13:04:02	
<input type="checkbox"/>	0	SENT	1000.00	00429 MR N. Botha - 11552			2021/02/23 10:15:36	
<input type="checkbox"/>	0	DEACTIVATED	10000.00	test 1234 - C Marcus			2021/02/22 11:09:05	
<input type="checkbox"/>	0	SENT	1200.00	3455 - Test			2021/02/19 16:44:04	
<input type="checkbox"/>	1	SENT	12.00	2706 - US			2021/02/19 15:25:45	
<input type="checkbox"/>	0	SENT	1.00	00429 MR N. Botha - 1335			2021/02/19 14:53:18	
<input type="checkbox"/>	0	POSTED	2572.20	Medical Orders - Bell	00	Successful	2021/02/19 12:04:48	2021/
<input type="checkbox"/>	0	POSTED	1.00	00429 MR N. Botha - 1335	00	Successful	2021/02/19 10:46:33	2021/
<input type="checkbox"/>	1	SENT	100.00	222 - N Botha			2021/02/19 10:28:09	
<input type="checkbox"/>	1	SENT	100.00	22 - N Botha			2021/02/19 10:09:46	
<input type="checkbox"/>	1	SENT	20.00	222 - N Botha			2021/02/19 09:41:05	