

# **PowerPay 5.0**

## INSTALLATION GUIDE

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## Licenses and Microsoft Windows

PowerPay for Dentrrix operates in a graphical environment called Windows, created by Microsoft Corporation. Microsoft Windows gives a standard look and feel to PowerPay for Dentrrix and all other Windows applications. To run PowerPay for Dentrrix and Microsoft Windows, you need to first license and install Microsoft Windows.

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# PowerPay Overview

PowerPay streamlines accounts receivable management by reducing past-due accounts via Credit Card payments. Credit Card transactions can be made in person at the time of service, or through Consent Forms, authorizing your office to charge a patient's credit card for services rendered. This reduces the need to send bills and for patients to mail in payments.

This installation guide will help you install and configure PowerPay.

## Installation and Setup

Before you begin installing PowerPay, you should read the following section carefully to make certain your computers can accommodate the PowerPay software and hardware.

## System Requirements

To allow installation of (or upgrade to) PowerPay 5.0, the following is required on your computers:

- Installation of .NET 3.51
- Installation of Dentrix G4 or higher

**Note:** Complete system recommendations and requirements for running PowerPay for Dentrix or the Dentrix software are available in the current System Requirements document on the Dentrix website at [www.Dentrix.com](http://www.Dentrix.com). This document can also be obtained by calling Dentrix Customer Support at 1-800-735-5518.

- Windows 2000/Windows XP or higher

Installation of Microsoft Visual C++ is also required and is included as part of the PowerPay installation if needed.

Installation of (or upgrade to) eSync 2.7.7 is also required for PowerPay 5.0 and is included as part of the PowerPay 5.0 installation.

If you currently have a previous version of PowerPay installed and are upgrading to 5.0, **all unsettled transactions must be settled before installing the upgrade.**

## How to Get Help

If you experience problems during the installation process which cannot be resolved, please contact eServices Technical Support at 1-800-734-5564. Software support for PowerPay is included as part of the software license. Please have the following information available when you call support:

- Your Dentrix customer number
  - The version of PowerPay you are installing
  - The version of Windows and type of network you are using
  - The exact wording of any messages that have appeared on the screen
-

# Installing the Software

The PowerPay installation program installs several components and walks you through the installation of each of these separate components. The installation procedure must be completed on each computer that will be using the PowerPay software.

## Installing the PowerPay Server

You must first install the software on the computer that is designated as the PowerPay Server. (This is not necessarily the Dentrax file server. However the computer that will act as the PowerPay Server must be connected to your network and have access to the Internet using a modem or by direct connection.)

### To install the PowerPay Server

1. Insert the PowerPay installation CD into your CD-ROM drive.

The PowerPay installation CD directory window appears.



### Notes:

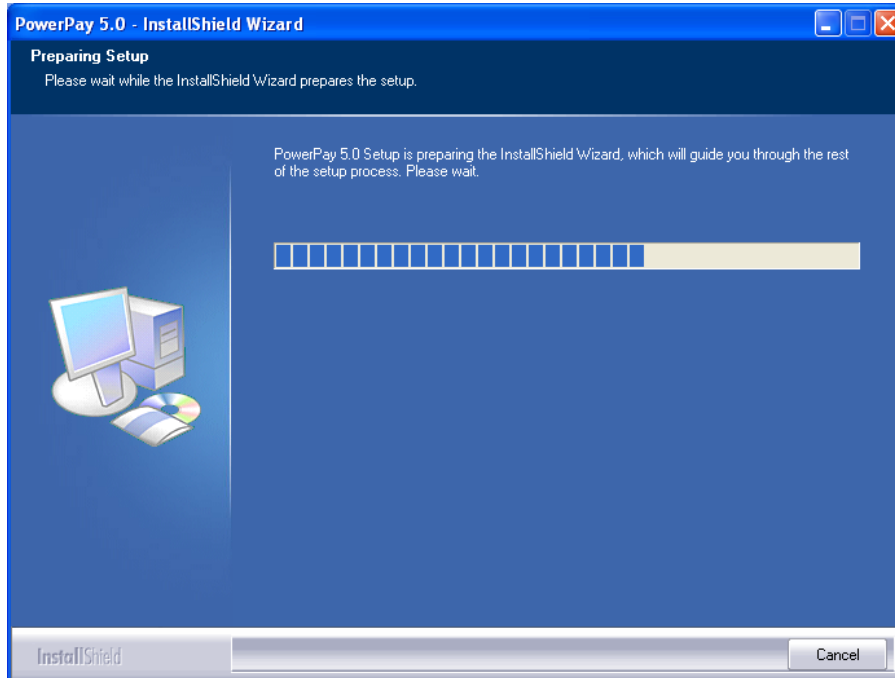
- If you are using Windows Vista, a **User Account Control** dialog box may appear. Click **Continue** to continue with the installation.
  - If auto-run is disabled, open Windows Explorer and run setup from the CD.
-

2. Click **Install PowerPay**.

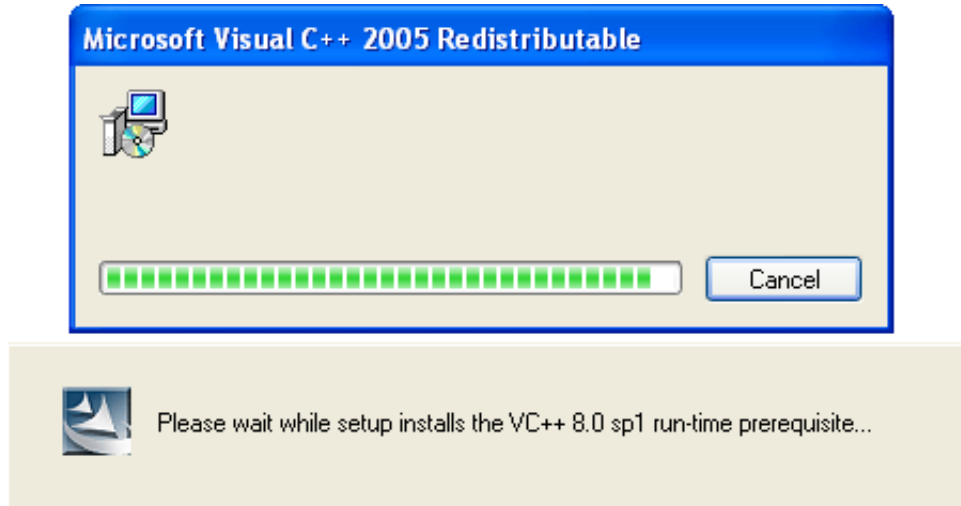
The PowerPay 5.0 splash screen appears briefly.



The installation process begins as PowerPay 5.0 Setup prepares the InstallShield Wizard which will guide you through the rest of the setup process.



Setup checks to see if the Microsoft Visual C++ 2005 Redistributable Package (required) is installed on the computer. If it is not installed, Setup automatically installs this Microsoft Visual C++ run-time prerequisite.

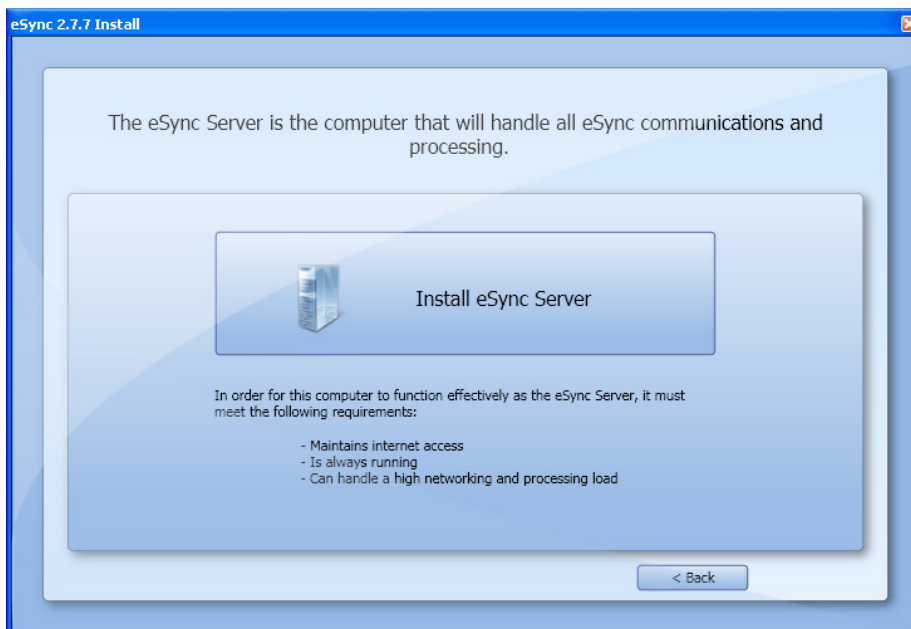


**Note:** Click **Cancel** only if you want to cancel this installation as well as the PowerPay installation.

The system then checks to see if an installation or upgrade of eSync is required. If so, the eSync installation process begins.

## Installing the eSync Server

eSync is the communication vehicle on which PowerPay 5.0 operates. If you already have a previous version of eSync installed, you will be guided to update your current version. If this is your practice's initial installation of eSync, you must first install eSync on what will be the eSync Server.



The eSync Server should be the one computer that will handle all eSync communications and processing (the Practice Server). It registers your Practice Server to the eSync Highway so that the exchange of information can take place. The eSync Server must be installed first, before any Client installations. In order for a computer to act as the eSync Practice Server, it must meet the following requirements:

- It must maintain Internet access
- It must always be running
- It must be able to handle a high networking and processing load

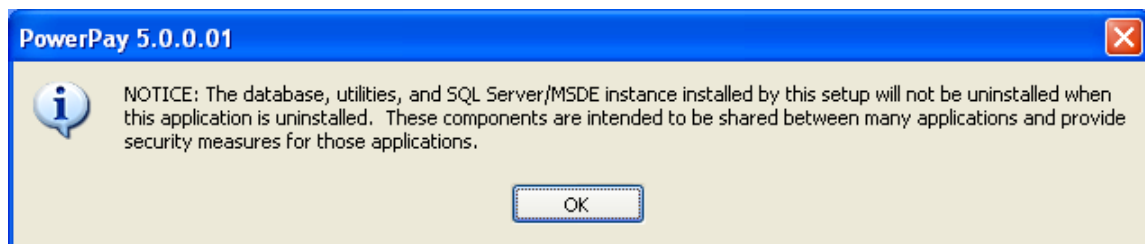
**Important:** Continue with the installation only if the computer you are using as your PowerPay Server meets these requirements. If the computer you are using as your PowerPay Server does *not* meet these requirements, close the eSync installation and cancel the PowerPay Server installation. Contact Customer Support to first install the eSync Server on the appropriate computer, then proceed with the PowerPay Server installation.

**Tip:** For instructions on the eSync installation process, click the Help link on any eSync installation screen.

Once eSync has successfully been installed, the PowerPay installation continues.

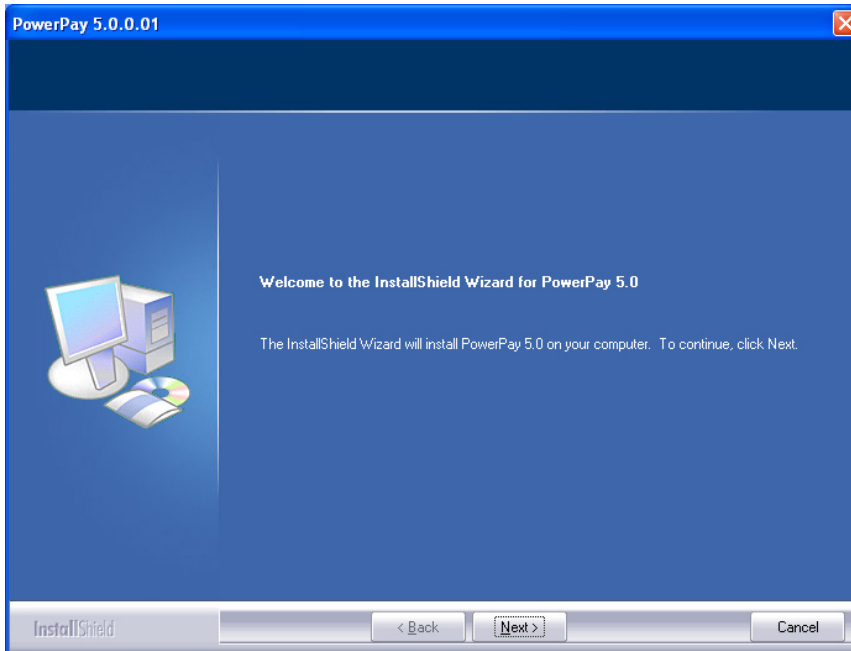
## Installing the PowerPay Server (Continued)

The system displays a notice that the database, utilities, and SQL Server/MSDE instance installed by the setup will not be uninstalled when the PowerPay application is uninstalled (because some components are shared between many programs).



3. Click **OK**.

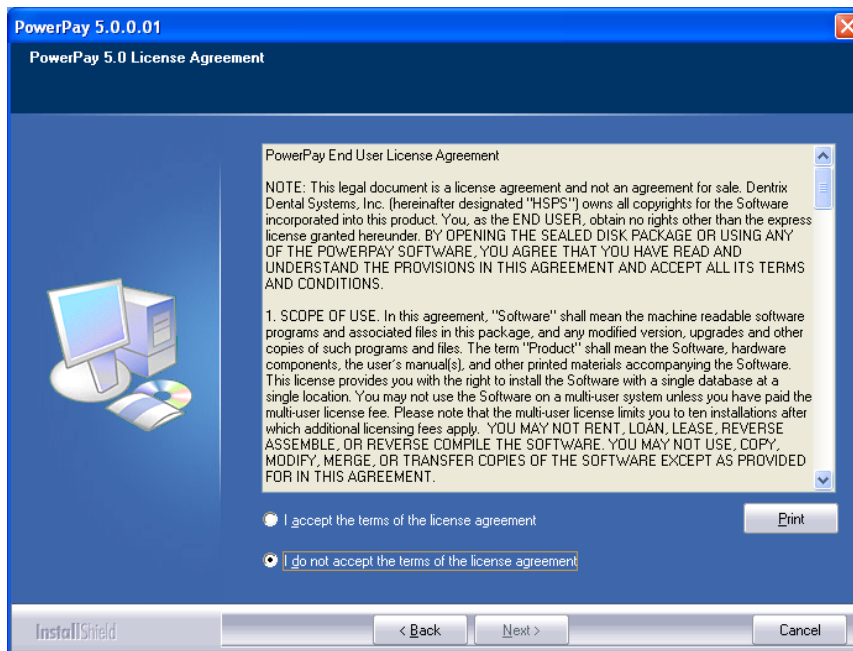
The PowerPay Installation Welcome screen appears.



4. Click **Next**.

The PowerPay License Agreement screen appears.

**Note:** Click the **Back** button at any time during the installation process if you need to return to a previous screen.



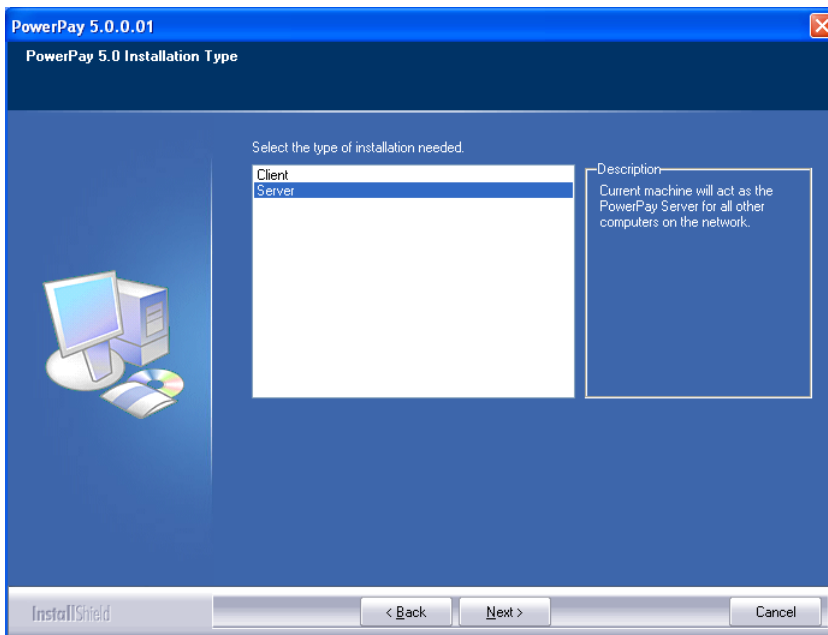
5. Read the PowerPay License Agreement and click **I accept the terms of the license agreement**.

**Note:** Once you have clicked the **I accept...** option, the **Next** button becomes enabled. If you select **I do not accept...** (indicating that you will not agree to the terms of the license), you are not allowed to proceed with the installation. Click **Cancel** to stop the installation.

**Tip:** Click **Print** to print a copy of the PowerPay End User License Agreement.

6. Click **Next**.

The Installation Type screen appears.

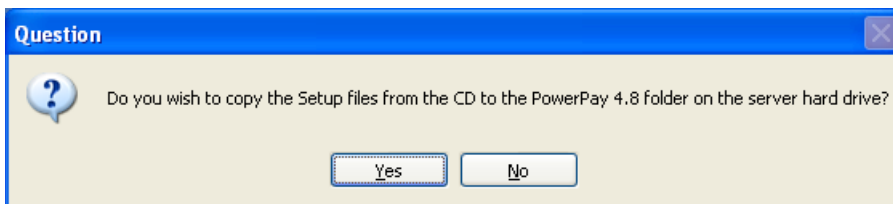


7. Select the **Server** installation type.

**Note:** If you have already installed the PowerPay Server, refer to the “Installing the PowerPay Client” section below.

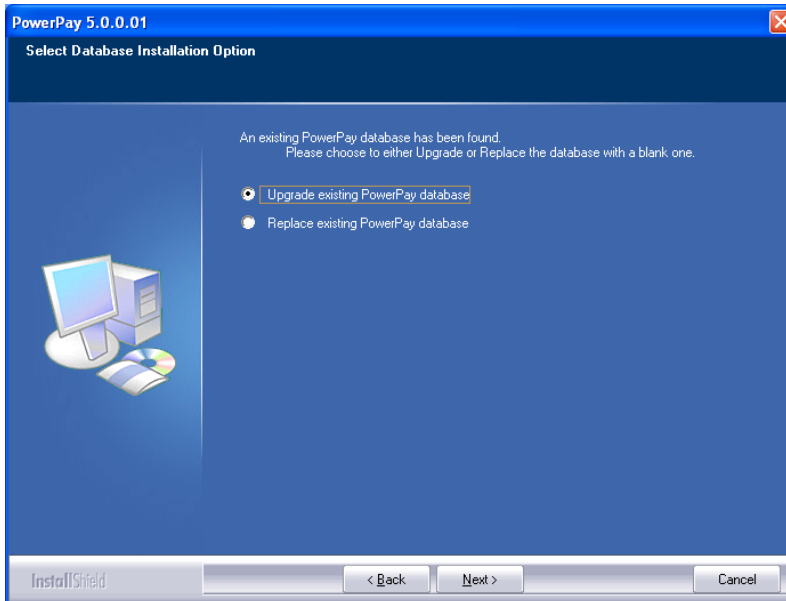
8. Click **Next**.

A question box appears asking if you would like to copy the PowerPay installation files to the hard drive of your computer.



9. Click **Yes** to reinstall PowerPay without having to use the installation CD.

If you have previously installed PowerPay and are upgrading, the Select Database Installation Option screen appears. If you are not upgrading, skip to step 10.

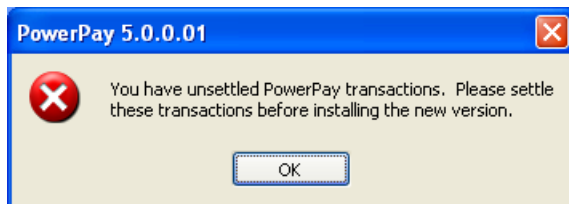


- a. If you want to use your current database with the PowerPay upgrade, click **Upgrade existing PowerPay database**.

If you want to remove your current database and install a blank database, click **Replace existing PowerPay database**.

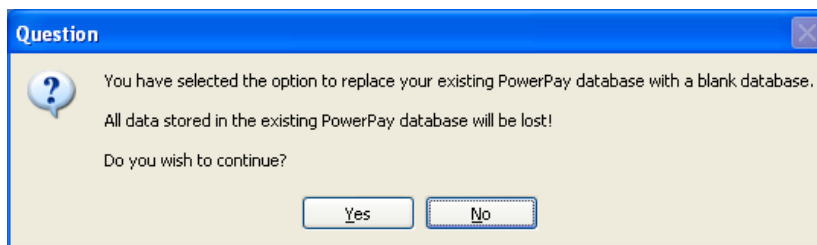
- b. Click **Next**.

If you selected the **Upgrade existing PowerPay database** option and have unsettled PowerPay transactions, a message asks you to settle the transactions before installing the new version.



Click **OK** to cancel the PowerPay installation, then open your current PowerPay program and settle all transactions.

If you selected the **Replace existing PowerPay database** option, a warning is displayed.

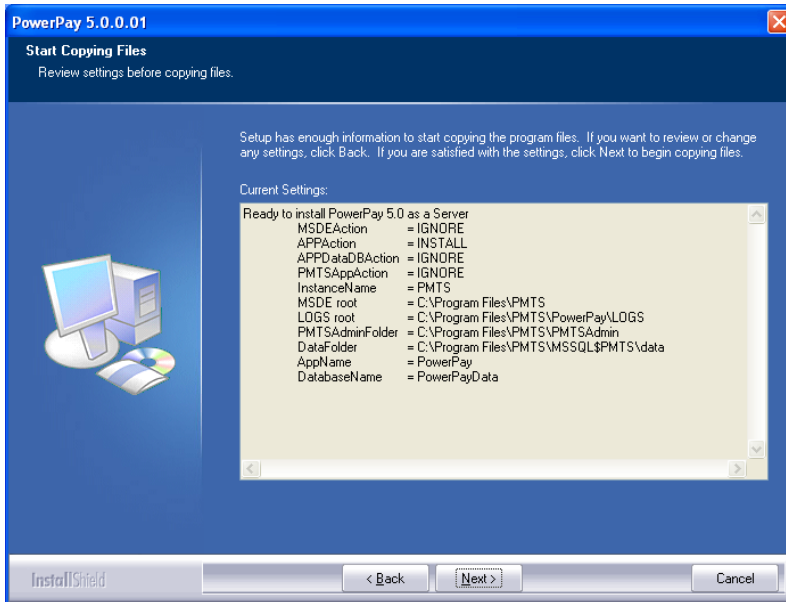


Click **No** to return to the Select Database Installation Option screen.

Or

Click **Yes** to replace your PowerPay database and continue with the installation.

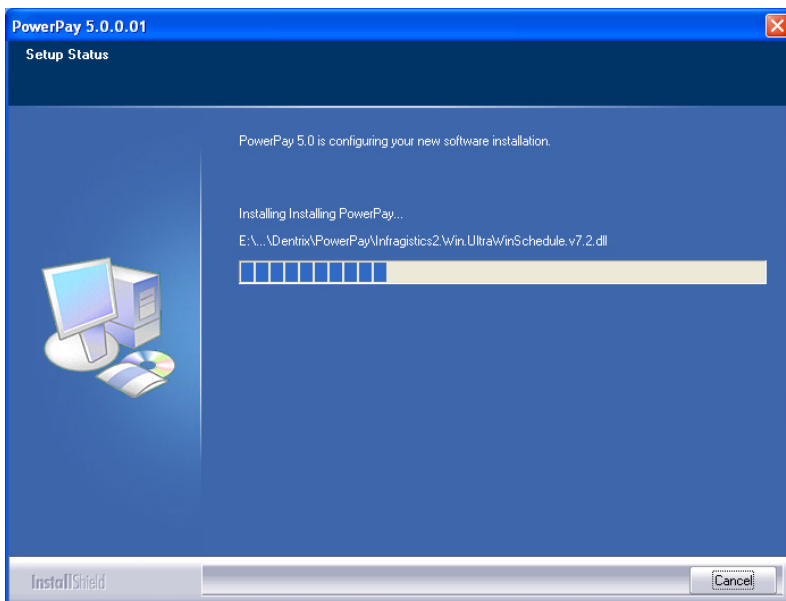
**10.** When the Start Copying Files screen appears, review the current settings.



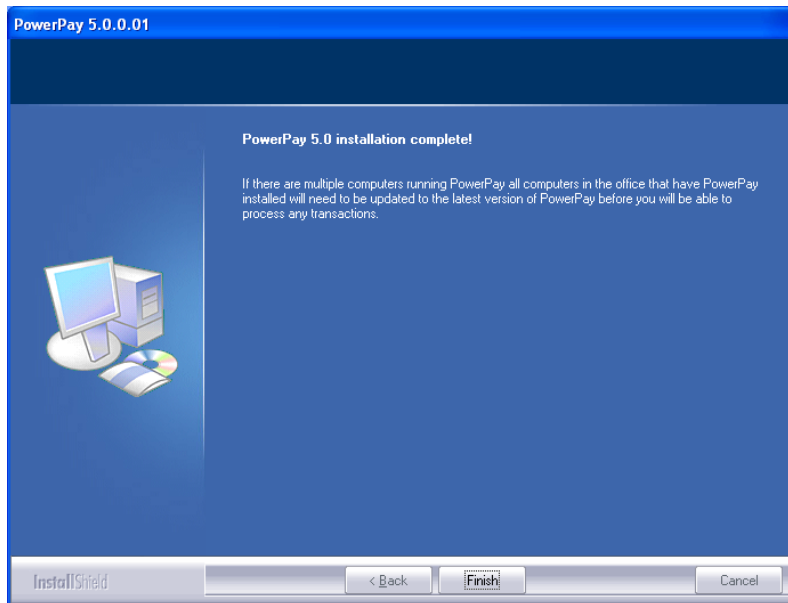
**Note:** If you need to change a current setting, click **Back**.

**11.** If you are satisfied with the settings, click **Next** to copy the files to the selected directories.

The PowerPay installation process now begins. This may take several minutes, during which time you will see various other messages marking the installation process.

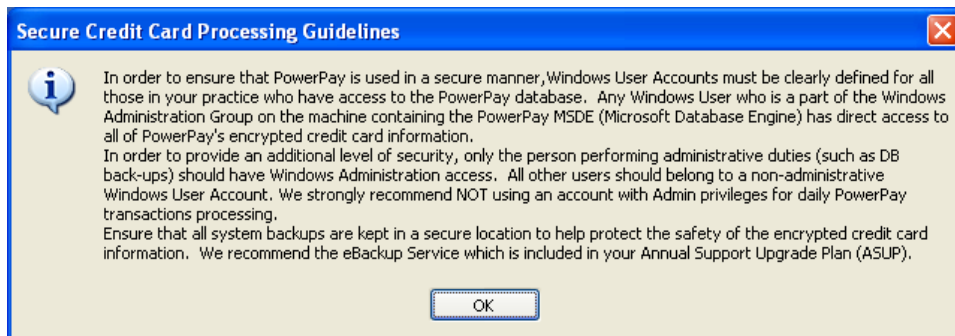


After the PowerPay Server software is successfully installed, the Installation Complete screen appears.



**12. Click Finish.**

Before the Installation Wizard exits, it informs you of the Secure Credit Card Processing Guidelines.



**13. Carefully review the Secure Credit Card Processing Guidelines, and click OK.**

## PowerPay Secure Usage Guidelines

Follow the guidelines below to ensure that PowerPay is used in a secure manner:

- **Secure credit card processing** – Windows User Accounts must be clearly defined for all those in your practice who have access to the PowerPay database. Any Windows user who is a member of the Windows Administration Group on the computer containing the PowerPay MSDE (Microsoft Database Engine) has direct access to all of PowerPay's encrypted credit card information.

In order to provide an additional level of security, only the person performing administrative duties (such as database backups) should have Windows Administration access. All other users should belong to a non-administrative Windows User Account. We strongly recommend *not* using an account with Administrative privileges for daily PowerPay transactions processing.

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- **System backups** – Ensure that all system backups are kept in a secure location to help protect the encrypted credit card information. We recommend the eBackup Service, which is included in your Annual Support Upgrade Plan (ASUP).
- **Anti-virus software** – We strongly recommend that anti-virus software be installed on all computers that will be using PowerPay. We also strongly recommend that the Windows Automatic Updates feature be set to notify or automatically download Windows updates. (To locate this feature in Windows, go to Windows Control Panel, open **System**, and double-click the **Automatic Updates** tab. For more information, see the Windows Help.)

If you are upgrading PowerPay, all computers in the office that have PowerPay installed will need to be upgraded to the latest version of PowerPay before you will be able to process any transactions. See “Installing the PowerPay Client” below.

If this is your initial installation of PowerPay, you will now need to install the PowerPay Client on all computers in your office from which you want to process transactions. See “Installing the PowerPay Client” below.

## Installing the PowerPay Client

After you have successfully installed the PowerPay Server, the PowerPay Client software should be installed on all remaining computer workstations in your office from which you will process transactions.

### To install the PowerPay Client on a computer workstation

1. Insert the PowerPay installation CD into your CD-ROM drive.

The PowerPay installation CD directory window appears.



### Notes:

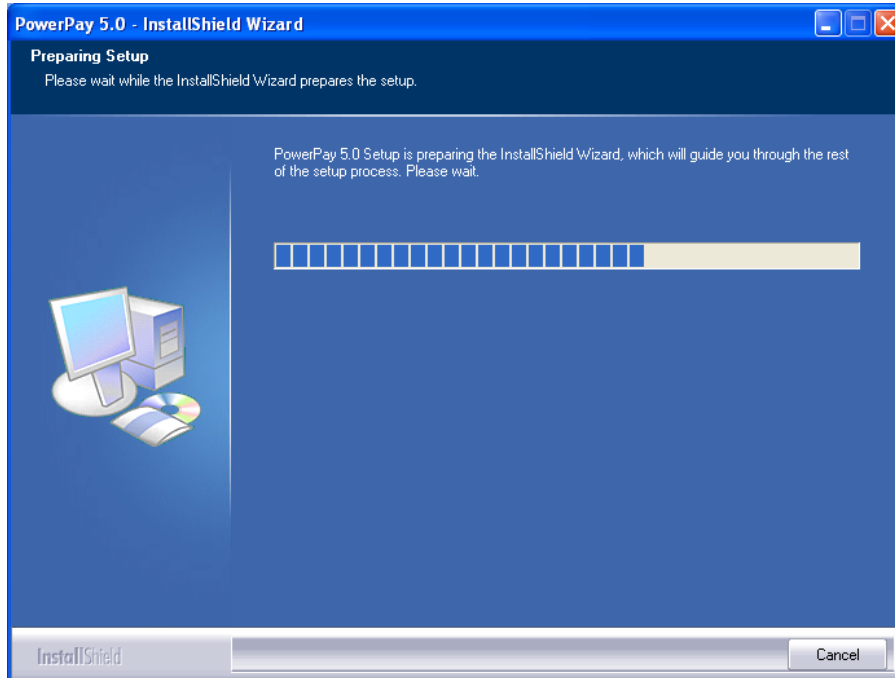
- If you are using Windows Vista, a **User Account Control** dialog box may appear. Click **Continue** to continue with the installation.
  - If auto-run is disabled, open Windows Explorer and run setup from the CD.
-

2. Click **Install PowerPay**.

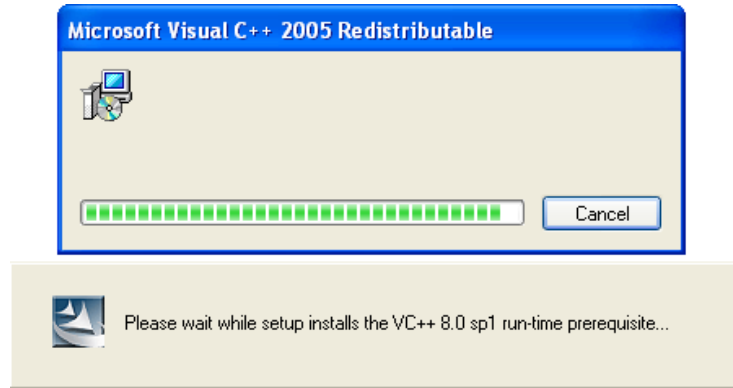
The PowerPay 5.0 splash screen appears briefly.



The installation process begins as PowerPay 5.0 Setup prepares the InstallShield Wizard which will guide you through the rest of the setup process.



Setup checks to see if the Microsoft Visual C++ 2005 Redistributable Package (required) is installed on the computer. If it is not installed, Setup automatically installs this Microsoft Visual C++ run-time prerequisite.

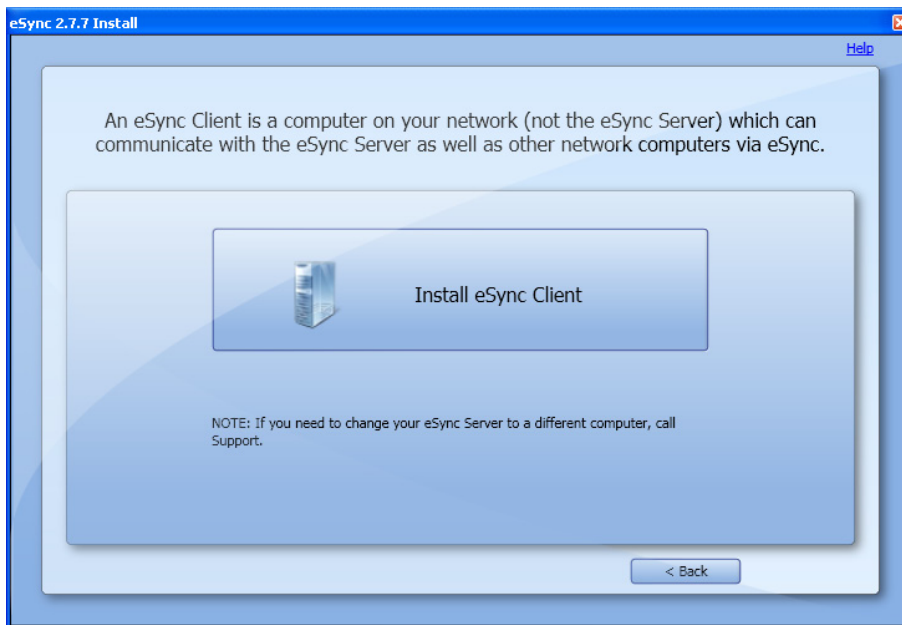


**Note:** Click **Cancel** only if you want to cancel this installation as well as the PowerPay installation.

The system then checks to see if an installation or upgrade of eSync is required. If so, the eSync installation process begins.

## Installing the eSync Client

The eSync Client should be installed on each workstation in your practice's network which has Internet access and is not the eSync Practice Server. It registers your workstation to your Practice Server (on the eSync Highway) so that the exchange of information can take place.

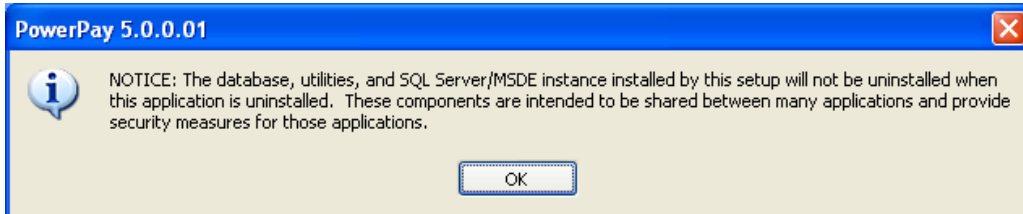


**Tip:** For instruction on the eSync installation process, click the Help link on any eSync installation screen. Once eSync has successfully been installed, the PowerPay installation continues.

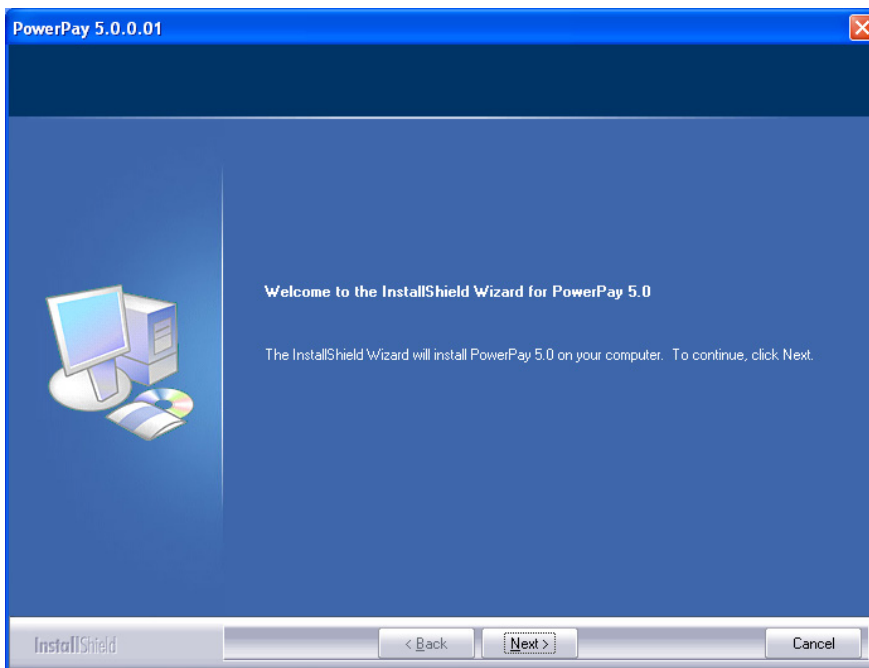
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## Installing the PowerPay Client (Continued)

Setup displays a notice that the database, utilities, and SQL Server/MSDE instance installed by the setup will not be uninstalled when the PowerPay application is uninstalled (as some components are shared between many applications).



The PowerPay Installation Welcome screen appears.

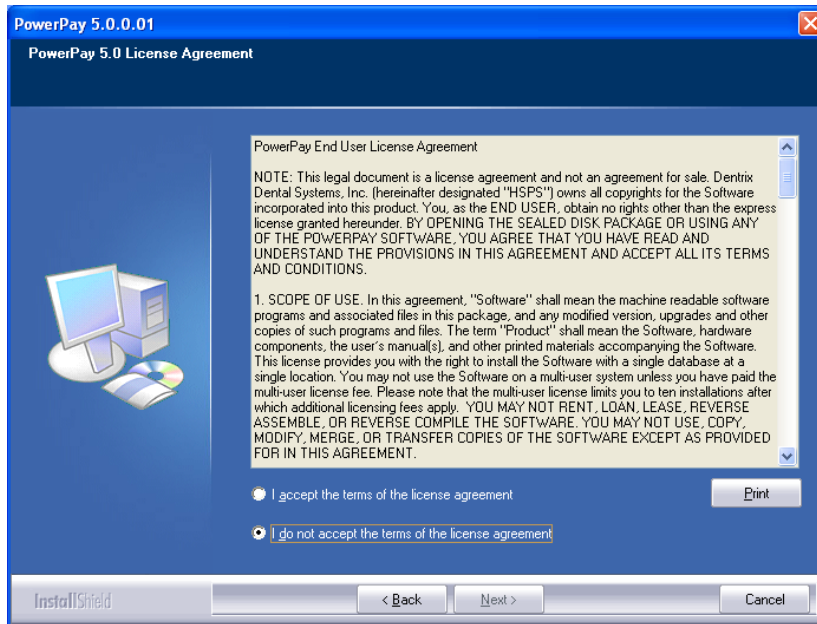


3. Click **Next**.

The PowerPay License Agreement screen appears.

**Note:** Click the **Back** button at any time during the installation process to return to a previous screen.

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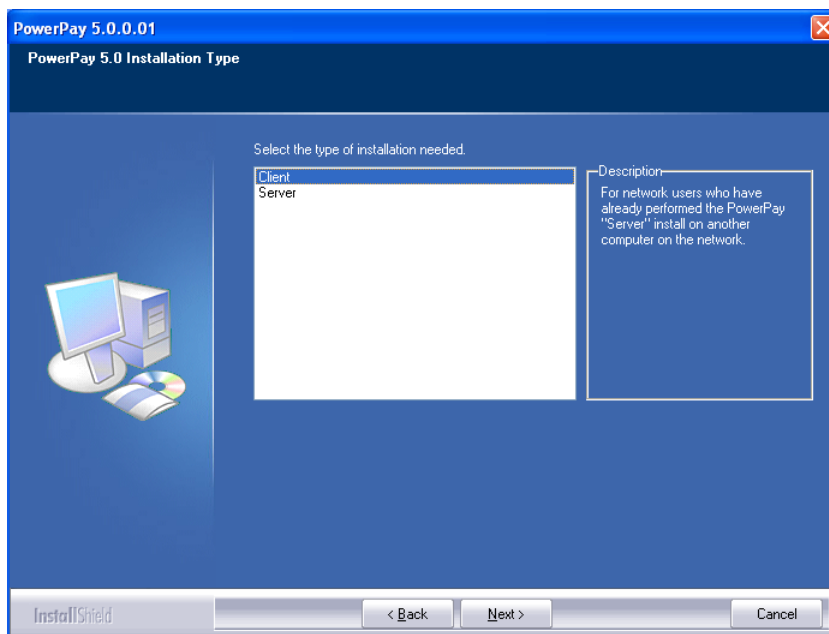
4. Read the PowerPay License Agreement and click **I accept the terms of the license agreement**.

**Tip:** Click **Print** to print a copy of the PowerPay End User License Agreement.

**Note:** Once you have clicked the **I accept...** option, the **Next** button becomes enabled. If you select **I do not accept...** (indicating that you will not agree to the terms of the license), you are not allowed to proceed with the installation. Click **Cancel** to stop the installation.

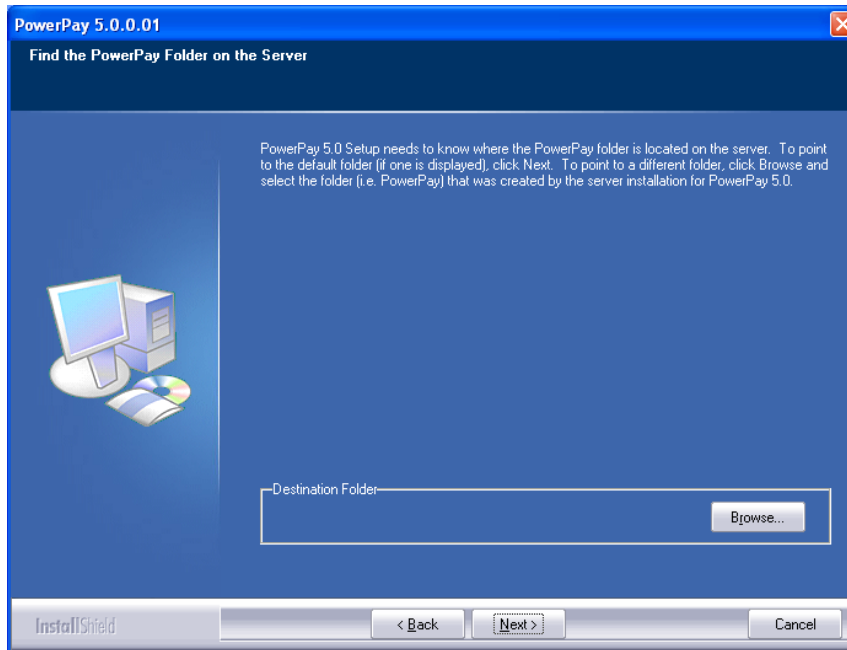
5. Click **Next**.

The Installation Type screen appears.



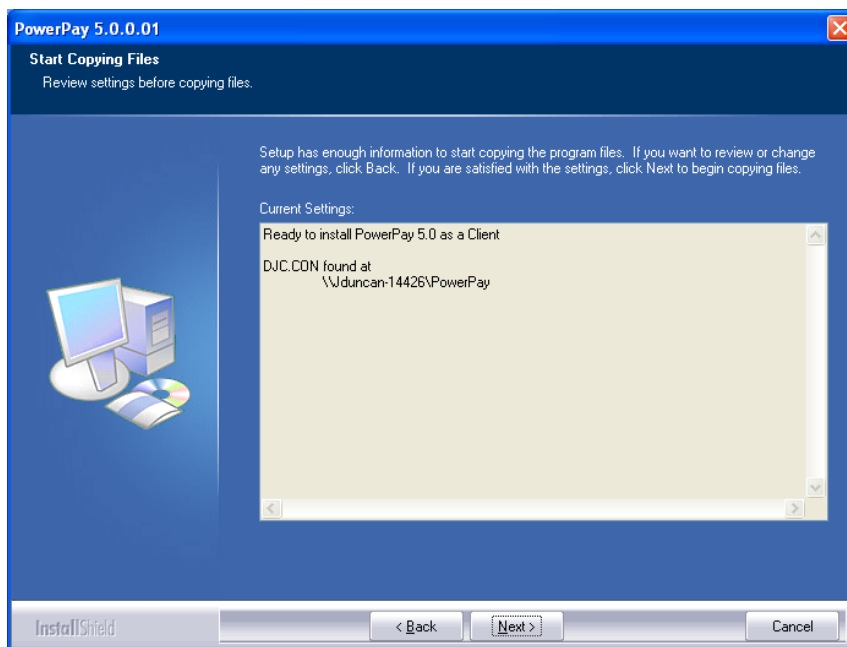
6. Select the client installation type and click **Next**.

The Find the PowerPay Folder on the Server screen appears. In order for PowerPay to install a Client on this computer, it needs to point to the PowerPay folder created by the Server installation.

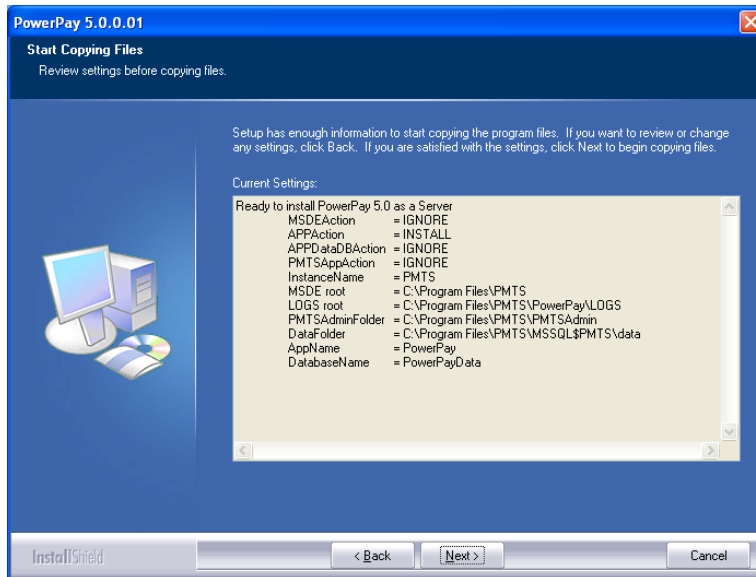


7. Confirm the displayed Destination Folder, or click **Browse** and select the PowerPay folder on the PowerPay Server.
8. Click **Next**.

The Start Copying Files window appears.



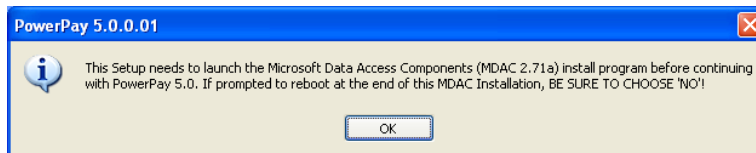
9. When the Start Copying Files screen appears, review the current settings.



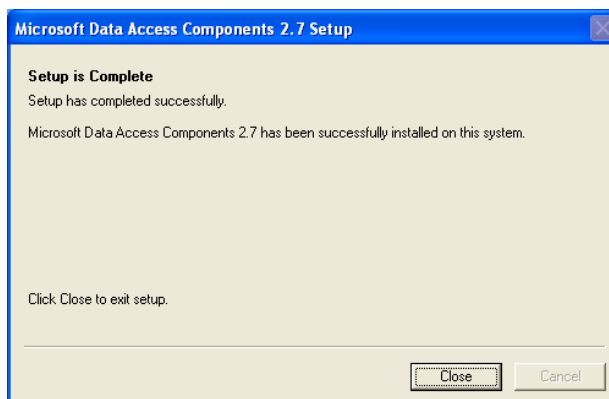
**Note:** If you need to change a current setting, click **Back**.

10. If you are satisfied with the settings, click **Next** to copy the files to the selected directories.

The system displays a message that the Microsoft Data Access Components (MDAC) program needs to be installed.

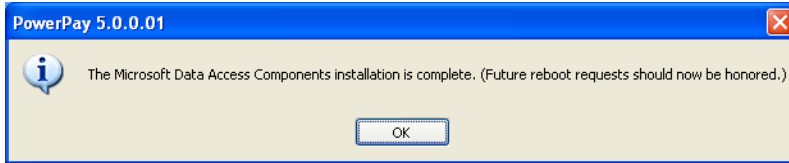


11. Click **OK** to proceed.
12. Proceed with the MDAC installation:
  - a. To accept the End User License Agreement, click **Next**.
  - b. Click **Finish** to begin MDAC installation.
  - c. When installation is complete, the Setup is Complete screen appears.



13. Click **Close** to exit Setup.

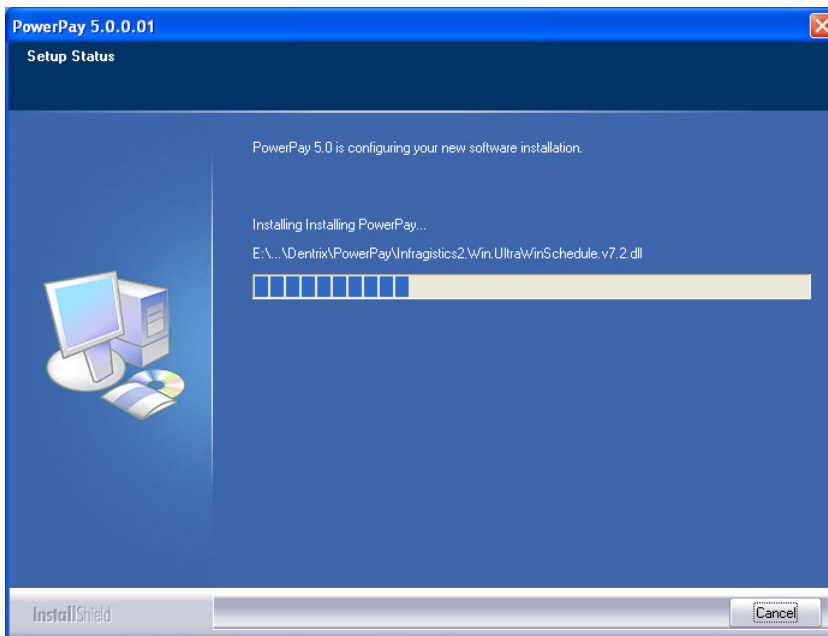
A message confirms that you may be given a request to reboot.



**Note:** Do *not* reboot if prompted at the end of the MDAC installation.

14. Click **OK**.

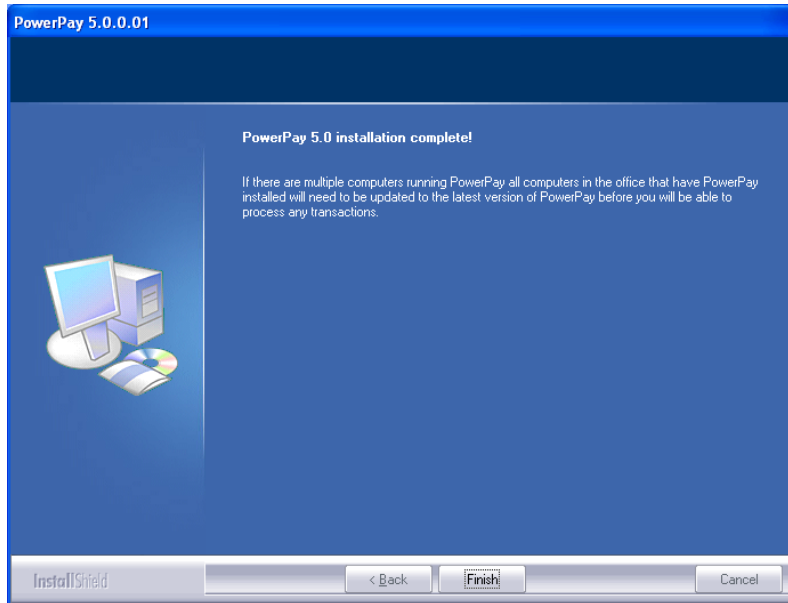
The PowerPay installation process now begins.



This process may take several minutes, during which time you will see various other messages and progress screens.

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Once the PowerPay Client software has been successfully installed, the Installation Complete screen appears.



**15. Click Finish.**

Repeat the PowerPay Client Installation steps on each workstation in your office from which PowerPay transactions will be processed.

## Third-party Software Installation

You have the option to purchase third-party hardware to assist in transaction processing. (On the PowerPay Installation screen, see Third Party Software.)



The installation instructions are provided below.

## Installing the Card Reader

The magnetic card stripe reader (card reader) should be installed prior to using PowerPay to process credit card payments.

### To install the card reader

1. Exit Windows and turn off the computer. (This is required before installing the card reader.)
2. Plug the card reader into any available USB slot.
3. Restart the computer.

If the card reader is operating correctly, you will hear the card reader beep, and the light will turn from red to green.

4. Mount the cable (optional).

**Note:** The card reader can be mounted using the Velcro strips included. It is recommended that you mount it on a desk, counter top, or wall to avoid damaging the cable.

For instruction on configuring your card reader for office use, refer to the PowerPay Help topic “Configuring the Card Reader” (from the Help **Contents** tab, click **PowerPay > Setting up PowerPay > Setting up PowerPay Hardware > Configuring the Card Reader**).

## Setting up the Ingenico device

After installing the Card Reader, you will need to connect the Ingenico device to your computer and configure it in PowerPay.

### To set up the Ingenico device

1. Connect the the Ingenico 6550 or 6580 to your computer and be sure to plug in the power for the device. Wait for the screen of the device to go blank before continuing to the next step.
2. Start PowerPay. For instruction on starting PowerPay, refer to the PowerPay Help topic “Starting PowerPay” (from the Help **Contents** tab, click **PowerPay > Setting up PowerPay > Starting PowerPay**).
3. Configure the Touch Screen Device. (For instruction on configuring your Ingenico Device for office use, refer to the PowerPay Help topic “Configuring the Touch Screen Device” (from the Help **Contents** tab, click **PowerPay > Setting up PowerPay > Setting up PowerPay Hardware > Configuring the Touch Screen Device**).

## Installing the Thermal Printer

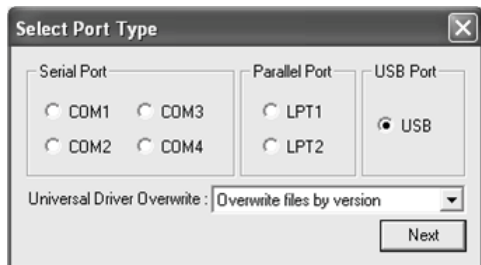
PowerPay provides seamless integration with the Bixolan Samsung SRP-350 Thermal Printer. Installing this printer requires two parts: the Windows component, and the Thermal Printer component.

### To install the Windows component of the thermal printer

1. From the PowerPay Install Welcome Screen, click **Third Party Software**.
-



2. Follow the on-screen instructions to install the Windows component of the installation.



3. When the **Select Port** dialog box appears, select **USB** and click **Next** to continue the installation. A **Software Installation** dialog box appears.



4. Click **Continue Anyway** to continue with the installation.

When the installation is complete, a dialog box will appear instructing you to turn the printer on and off.

---

Follow the instructions below to install the Thermal Printer installation component.

**To install the thermal printer installation component**

1. Plug the thermal printer into your computer's USB port.
2. Turn the printer on.
3. Follow the on-screen instructions to install the printer.
4. When the **Software Installation** dialog box appears, click **Continue Anyway** to continue with the installation.

**Note:** If you installed the thermal printer before installing it with these instructions, the Bixelon Samsung SRP-350 printer will be listed twice in your Printers and Faxes. To remove an instance of the printer, open your Printers and Faxes screen by clicking the Windows Start menu, then clicking **Printers and Faxes**. Select the instance of the Samsung SRP-350 that is not needed. Delete the printer by right-clicking the printer and clicking **Delete**.

## Setting up PowerPay in Office Manager

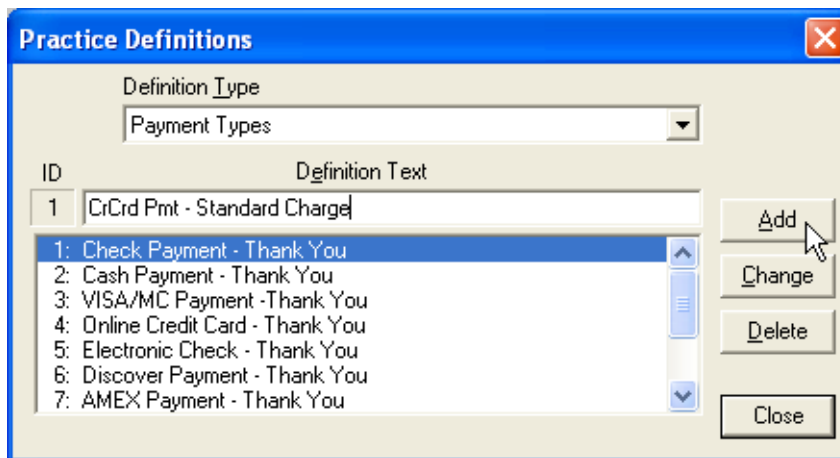
Before accessing PowerPay, you must first perform the required setup in Dentrix Office Manager. First, you'll need to add the new PowerPay Payment Types and Adjustment Types in Office Manager. Next, you'll need to assign the new types in the PowerPay Setup window.

## Additional Payment and Adjustment Types

Certain Payment Type and Adjustment Type definitions must be added in order to post automatic credit card transactions to the patient Ledger.

**To add the new PowerPay Payment Types in Office Manager**

1. From the **Maintenance** menu, point to **Practice Setup**, and click **Definitions**.  
The **Practice Definitions** dialog box appears.
  2. Select **Payment Types** from the **Definition Type** list.  
The current list of Payment Types is displayed.
  3. Add the following new Payment Types:
    - CrCrd Pmt - Standard Charge
    - CrCrd Pmt - One Time Consent
    - CrCrd Pmt - Annual/Time Span
    - CrCrd Pmt - Recurring Consent
-



**Note:** To add a new Payment Type, in the **Definition Text** field, select an existing definition and replace it with a new description, then click **Add**.

The new Payment Type is added as the next available type in the list (usually as the last type listed).

#### To add the new PowerPay Adjustment Types in Office Manager

1. From the **Maintenance** menu, point to **Practice Setup**, and click **Definitions**.

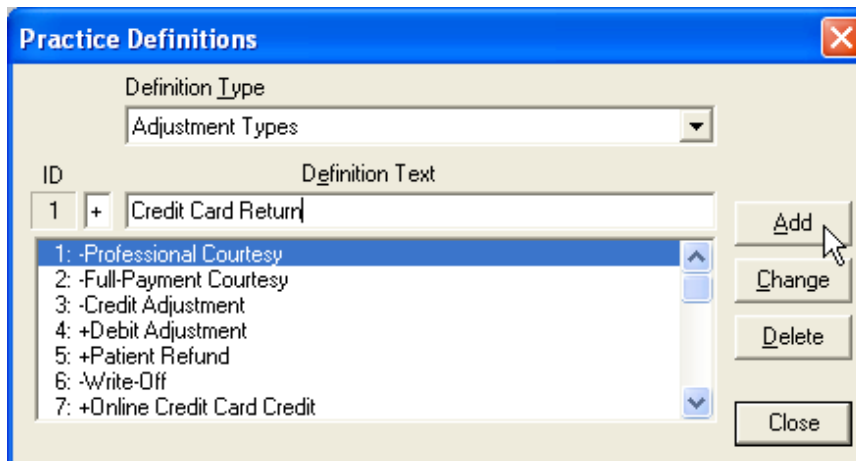
The **Practice Definitions** dialog box appears.

2. Select **Adjustment Types** from the **Definition Type** list.

The current list of **Adjustment Types** is displayed.

3. Add the following new Adjustment Types:

- (+) Credit Card Return
- (+) Auth CrCard Charge Voided
- (-) Auth CrCard Credit Voided



**Note:** To add a new Adjustment Type, replace the existing description in the Definition Text field with a new description, and specify whether the adjustment is positive or negative. If the adjustment

should be added to the account balance, type a “+” sign in the field to the left of the description. If the adjustment should decrease the account balance, type a “-” sign in the field to the left of the description. Click **Add**.

The new Adjustment Type is added as the next available type in the list (usually as the last type listed).

**Note:** Spelling and word choice are important when creating Payment Types and Adjustment Types. Be sure to make them understandable and professional, as they will be printed on Billing and Walkout Statements as a description of any payments/adjustments made.

## PowerPay Setup in Practice Setup

Once the Payment and Adjustment Types have been added, you need to assign the new types in the PowerPay Setup window in Office Manager.

**To assign the new types in the PowerPay Setup window in Office Manager**

1. From the **Maintenance** menu, point to **Practice Setup** and click **PowerPay Setup**.

The **PowerPay Setup** dialog box appears.

**PowerPay Setup**

Select A Dentrix Payment Type For Each PowerPay Charge

Standard Charge	One Time Consent Charge
12: CrCrd Pmt - Standard Charge	12: CrCrd Pmt - Standard Charge
13: CrCrd Pmt - One Time Conse	13: CrCrd Pmt - One Time Conse
14: CrCrd Pmt - Annual/Time Sp	14: CrCrd Pmt - Annual/Time Sp
15: CrCrd Pmt - Recurring Conse	15: CrCrd Pmt - Recurring Conse

Annual/Time Span Consent Charge	Recurring Consent Charge
12: CrCrd Pmt - Standard Charge	12: CrCrd Pmt - Standard Charge
13: CrCrd Pmt - One Time Conse	13: CrCrd Pmt - One Time Conse
14: CrCrd Pmt - Annual/Time Sp	14: CrCrd Pmt - Annual/Time Sp
15: CrCrd Pmt - Recurring Conse	15: CrCrd Pmt - Recurring Conse

Select A Dentrix Adjustment Type For Other PowerPay Transactions

Standard Credit
26: +Sales Tax
27: +Credit Card Return
28: +Auth CrCard Charge Voided

Authorized Charge Voided	Authorized Credit Voided
26: +Sales Tax	22: -Misc. Credit
27: +Credit Card Return	24: -Initial Credit Balance Forward
28: +Auth CrCard Charge Voided	29: -Auth CrCard Credit Voided

Post Ledger Transactions Automatically

OK Cancel

In the **PowerPay Setup** dialog box, there are four areas to assign Payment Types and three to assign Adjustment Types. These are associated with the definitions that have been added.

2. Select the appropriate Payment Types and Adjustment Types in each area, as shown above.
3. (Optional) If you would like payments and credits to post automatically to the patient's account once they have been authorized in PowerPay, select the **Post Ledger Transactions Automatically** option.

**Note:** If this option is not selected, when a payment or credit has been authorized in PowerPay, the appropriate dialog box will appear prompting you to OK the transaction entry.

4. Click **OK**.

## Starting PowerPay

PowerPay is accessed through the Dentrix Ledger module.

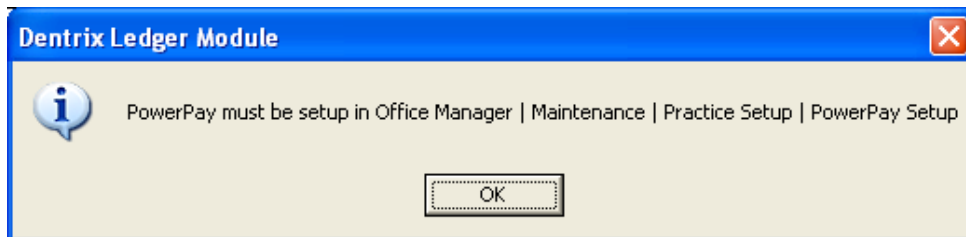
### To open PowerPay following its installation

1. Open Dentrix Ledger and select a patient.  
The toolbar will now have a PowerPay Icon.

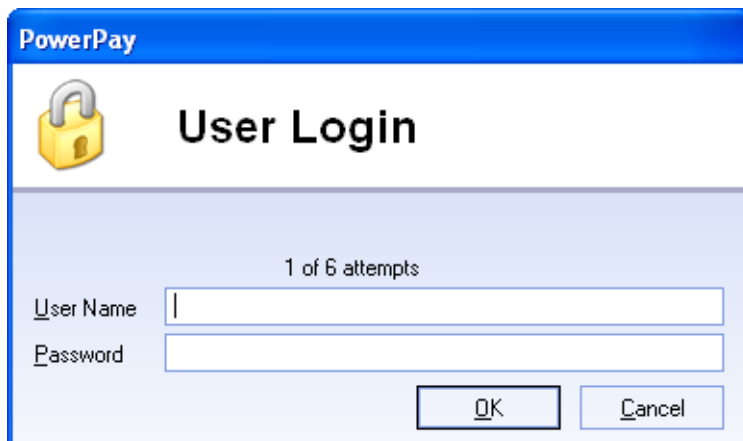


2. Click the PowerPay Icon.

**Note:** If you have not yet set up PowerPay in Office Manager, the following message appears.



If PowerPay was previously set up in Office Manager, PowerPay Opens and displays the **User Login** dialog box.



3. In the **User Name** and **Password** fields, type your user name and password.

**Note:** If this is your first time logging in to PowerPay, use the system defaults:

- **User Name:** “admin”
- **Password:** (leave this field blank)

4. Click **OK**.

## Initial Login: Changing Your Password

After a successful initial login (using the default “admin” User Name and Password), you are required to change your password.

**Note:** The “admin” account should not be used for daily PowerPay transactions processing. The admin account should be used only for administrative management of PowerPay with highly restricted access. We strongly advise that the admin account password be changed to a complex, private password.

### To change your password

1. Enter your password information in the appropriate fields.



- Current Password: leave this field blank (default).
- New Password/Confirm Password: Enter your desired password.

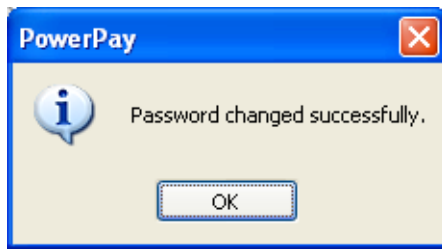
**Note:** Passwords must contain at least 7 characters in alpha-numeric combination.

2. Click **OK**.

**Note:** Your New Password and Confirm Password entries must match. If they do not, you are prompted to re-enter your New Password.

If your Password change is successful, a message appears.

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3. Click **OK**.

The PowerPay program is started.

**Note:** Refer to the PowerPay Help for setup instructions and information on using PowerPay.

**To open the PowerPay Help**

- From the **Help** menu, click **Contents**.

