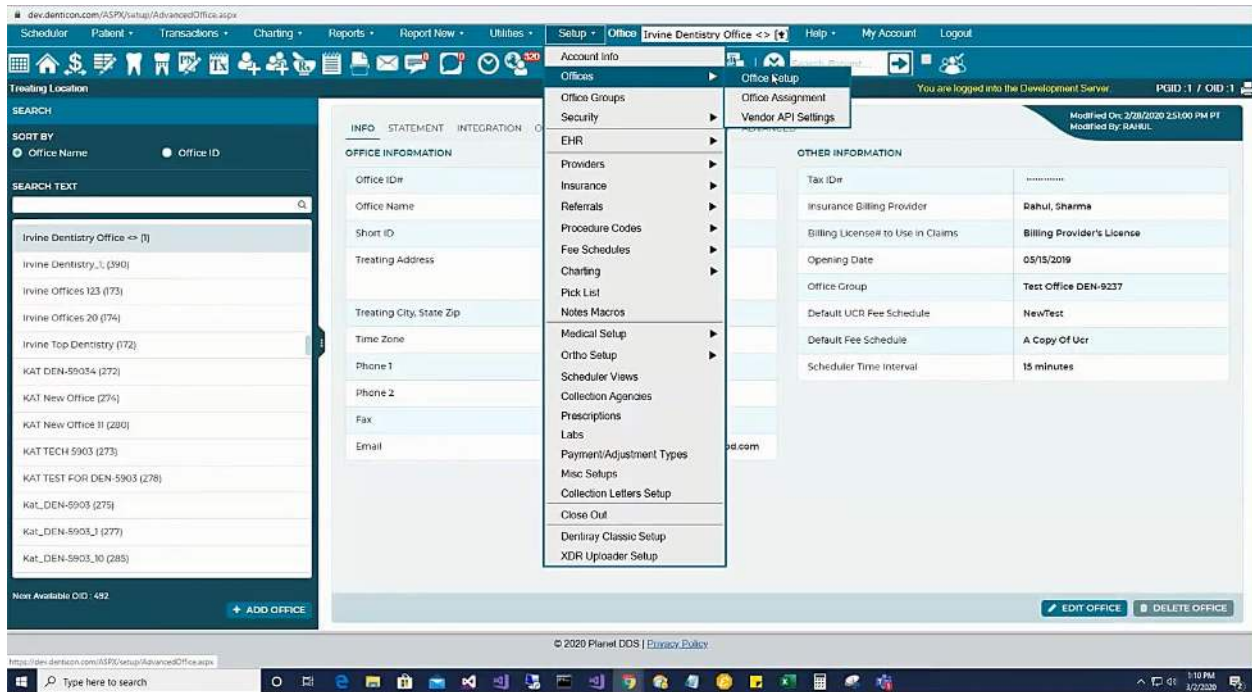


## Contents

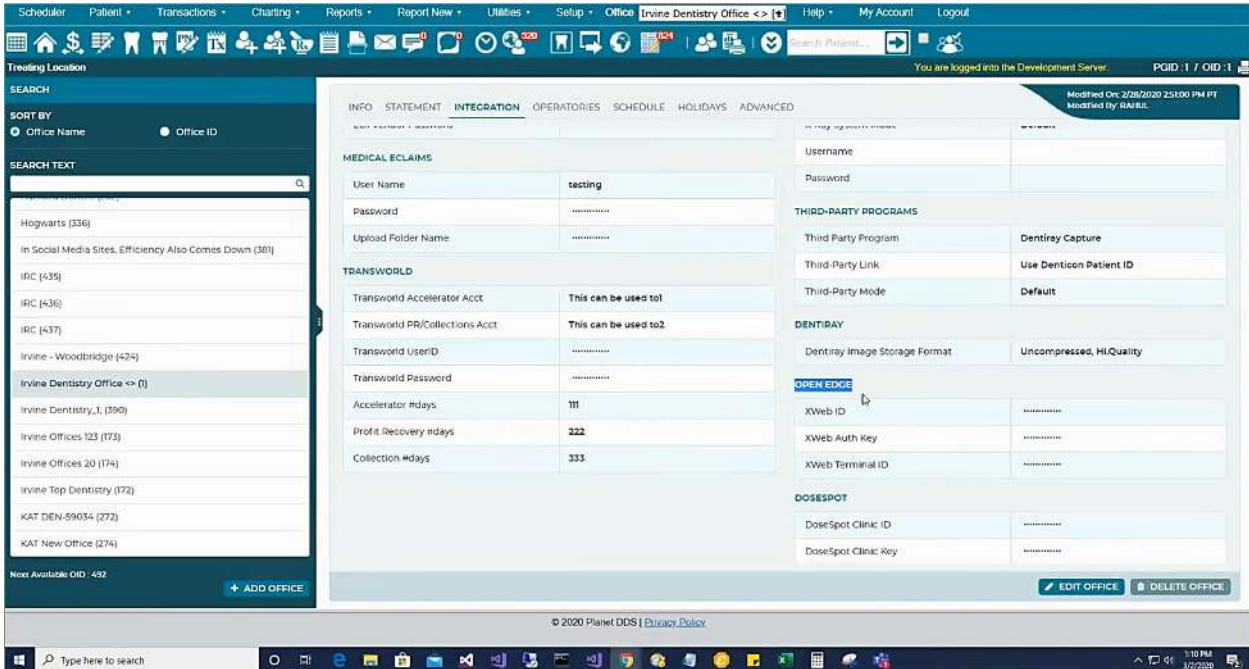
- A. Software Setup
- B. Transactions
  - [Credit – Purchase](#)
  - [Credit – Purchase](#) (via manual entry)
  - [Credit – Void](#)
  - [Credit – Dependent Refund](#)
  - [Tokenization – Create](#)
  - [Tokenization – Delete](#)
  - [Credit – Purchase](#) (via Payment Portal)
  - [Credit – Purchase](#) (via Patient Portal)

## A. Software Setup

1. On the main screen, go to the **Setup** tab and then **Offices > Office Setup**.



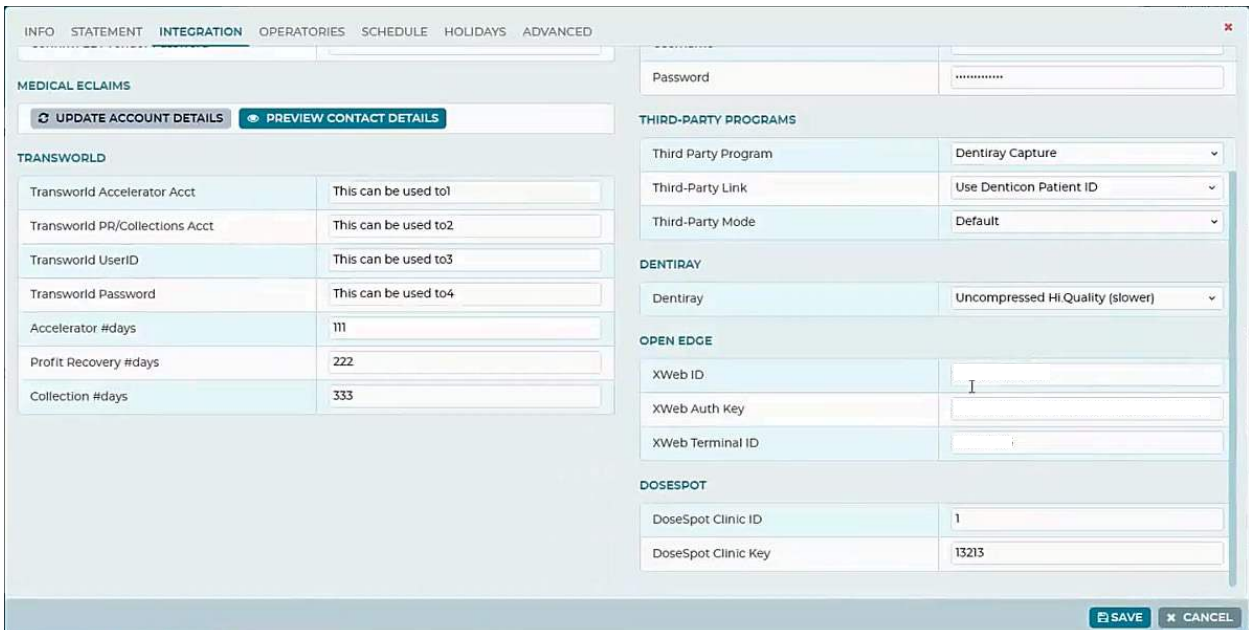
- Select an existing office account from the list on the left pane or click the [+ ADD OFFICE](#) button to add a new one. Go to the **INTEGRATION** tab and click on the **EDIT OFFICE** button.



The screenshot shows the Planet DDS software interface. The top navigation bar includes 'Scheduler', 'Patient', 'Transactions', 'Charting', 'Reports', 'Report New', 'Utilities', 'Setup', 'Office', 'Irvine Dentistry Office', 'Help', 'My Account', and 'Logout'. The main content area is divided into several sections: 'MEDICAL RECLAIMS', 'TRANSWORLD', 'THIRD-PARTY PROGRAMS', 'DENTIRAY', and 'DOSESPOT'. The 'INTEGRATION' tab is selected, and the 'EDIT OFFICE' button is visible at the bottom right. The 'TRANSWORLD' section contains a table with the following data:

Transworld Accelerator Acct	This can be used to1
Transworld PR/Collections Acct	This can be used to2
Transworld UserID	.....
Transworld Password	.....
Accelerator #days	111
Profit Recovery #days	222
Collection #days	333

- Under the **INTEGRATION** tab, scroll down to the **OPEN EDGE** section and enter the Edge account credentials in each applicable field. Click **SAVE** after.



The screenshot shows the Planet DDS software interface with the 'OPEN EDGE' section expanded. The 'OPEN EDGE' section contains the following input fields:

- XWeb ID
- XWeb Auth Key
- XWeb Terminal ID

The 'DOSESPOT' section contains the following input fields:

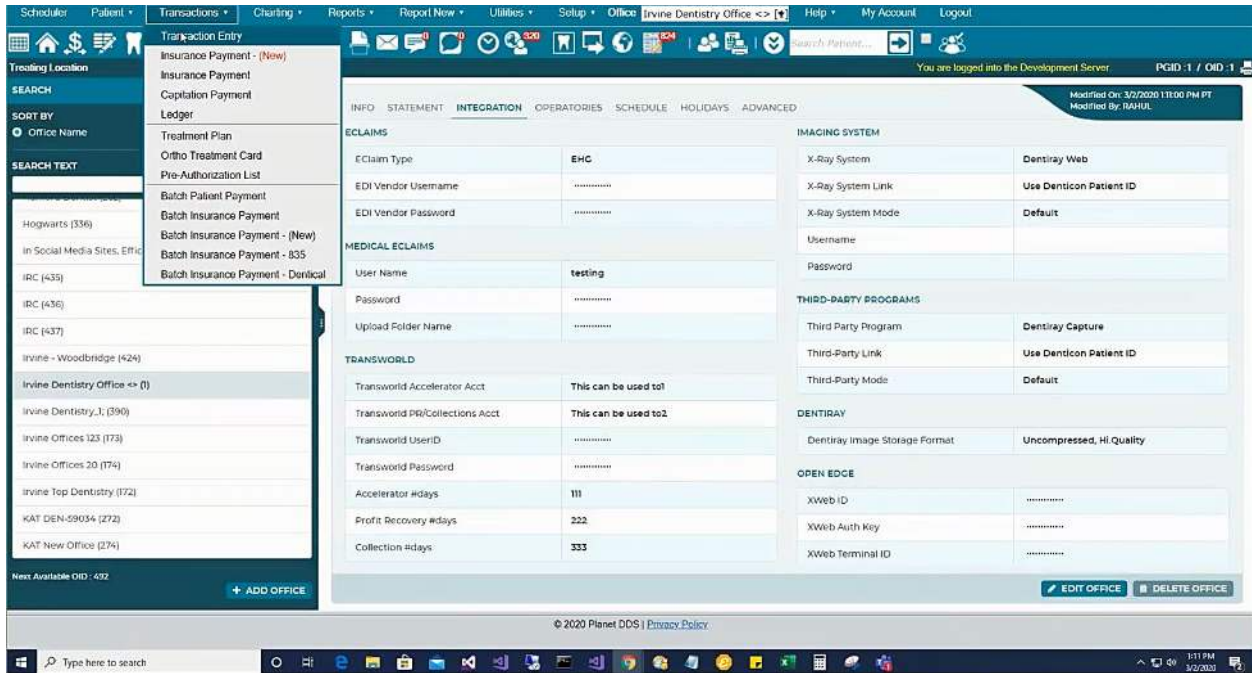
- DoseSpot Clinic ID: 1
- DoseSpot Clinic Key: 13213

The 'SAVE' button is visible at the bottom right.

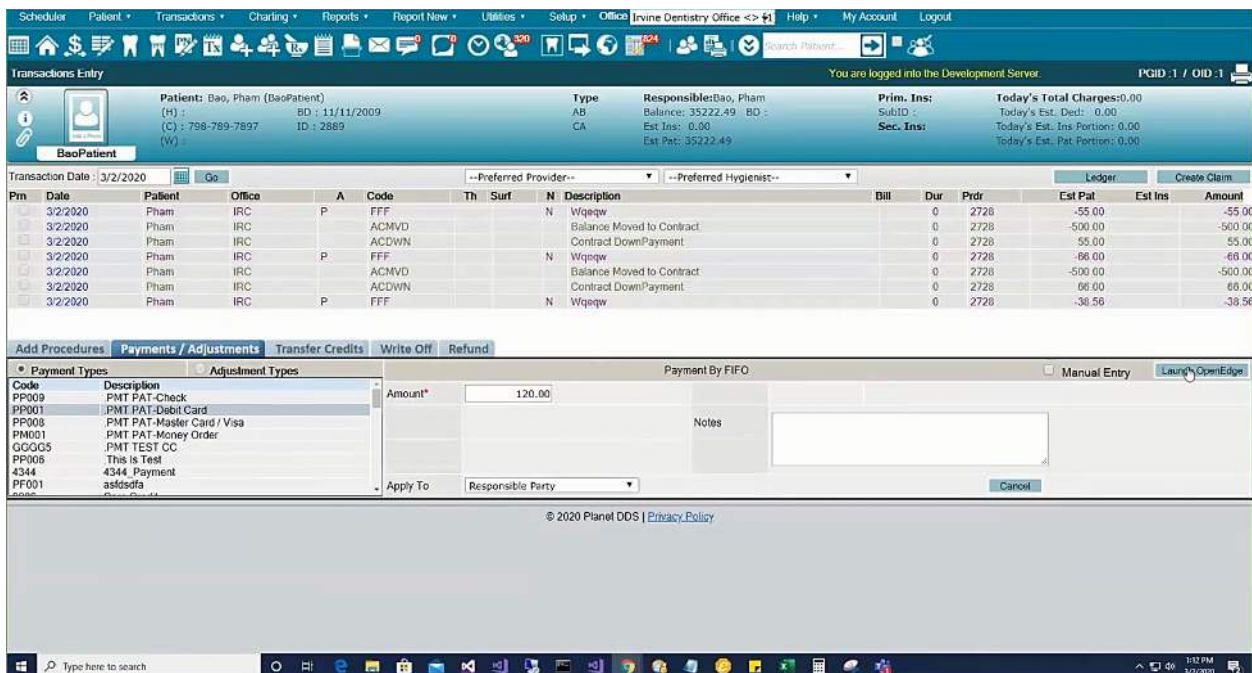
## B. Transactions

- Credit – Purchase

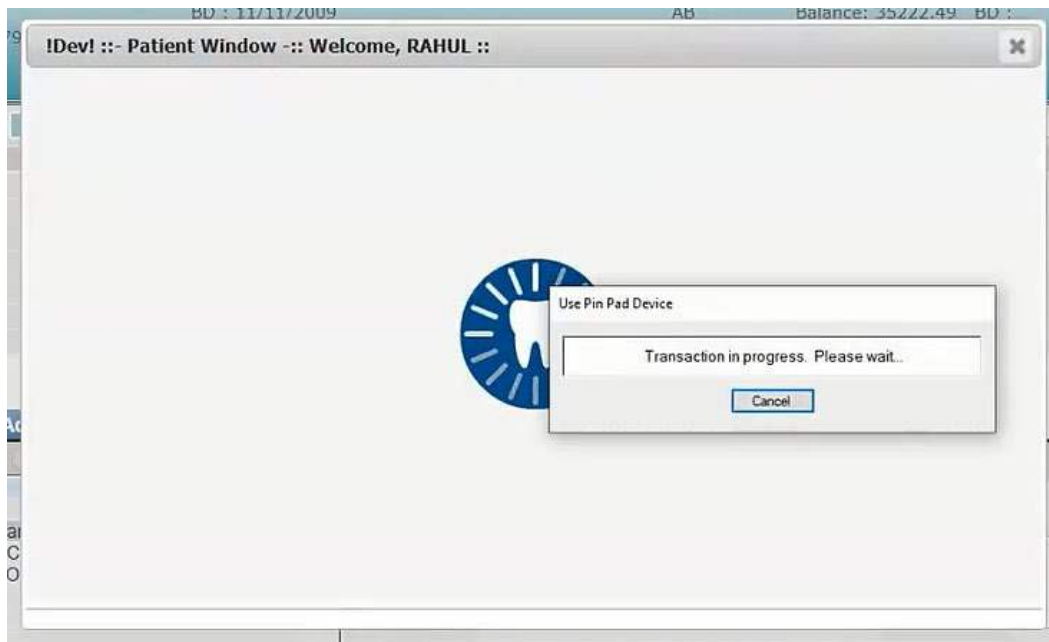
1. On the main screen, go to the Transactions tab and then click the **Transaction Entry** option.



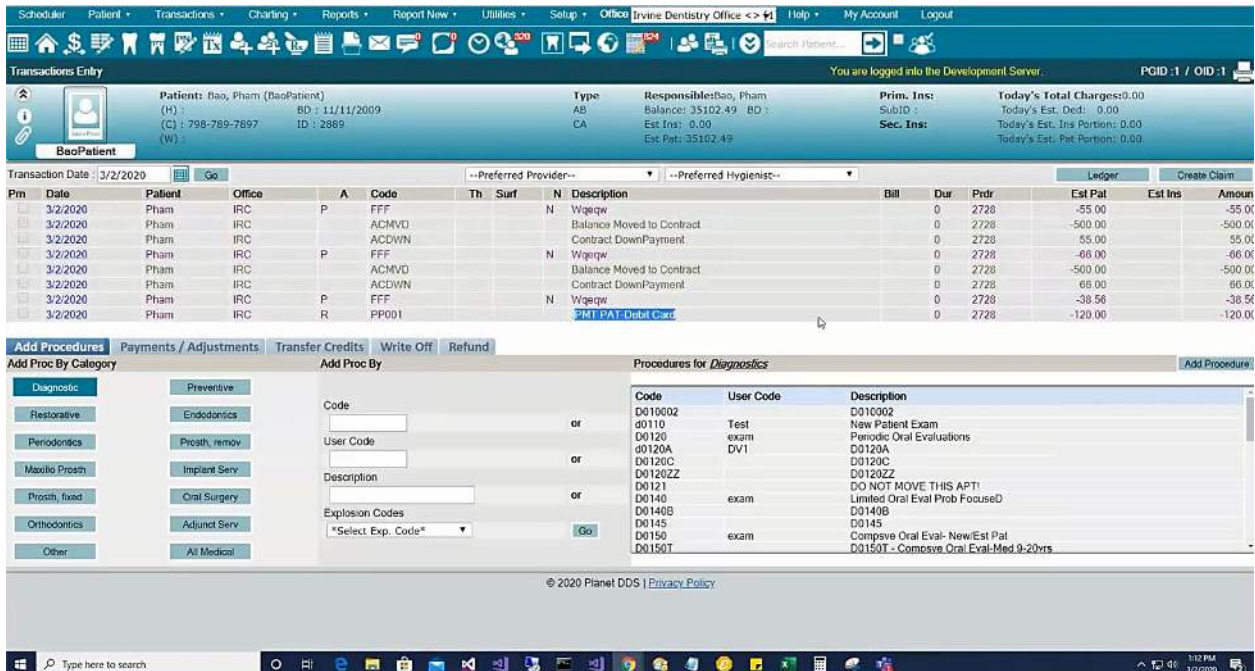
2. Go to the **Payments / Adjustments** subtab. Select a payment type and enter an amount. Click on the **Launch OpenEdge** button.



3. Follow the prompts on the connected device.



4. Transaction approves.



The screenshot displays the Denticon v.SaaS interface. At the top, there is a navigation bar with various icons and a search bar. Below this, a patient information header shows details for Bao, Pham (BaoPatient), including their phone number, birth date, and ID. A table of transactions is visible, listing dates, patient names, offices, and descriptions. Below the table, there are tabs for "Add Procedures", "Payments / Adjustments", "Transfer Credits", "Write Off", and "Refund". The "Add Procedures" tab is active, showing a list of procedure codes and descriptions. The interface also includes a footer with copyright information for Planet DDS and a privacy policy link.

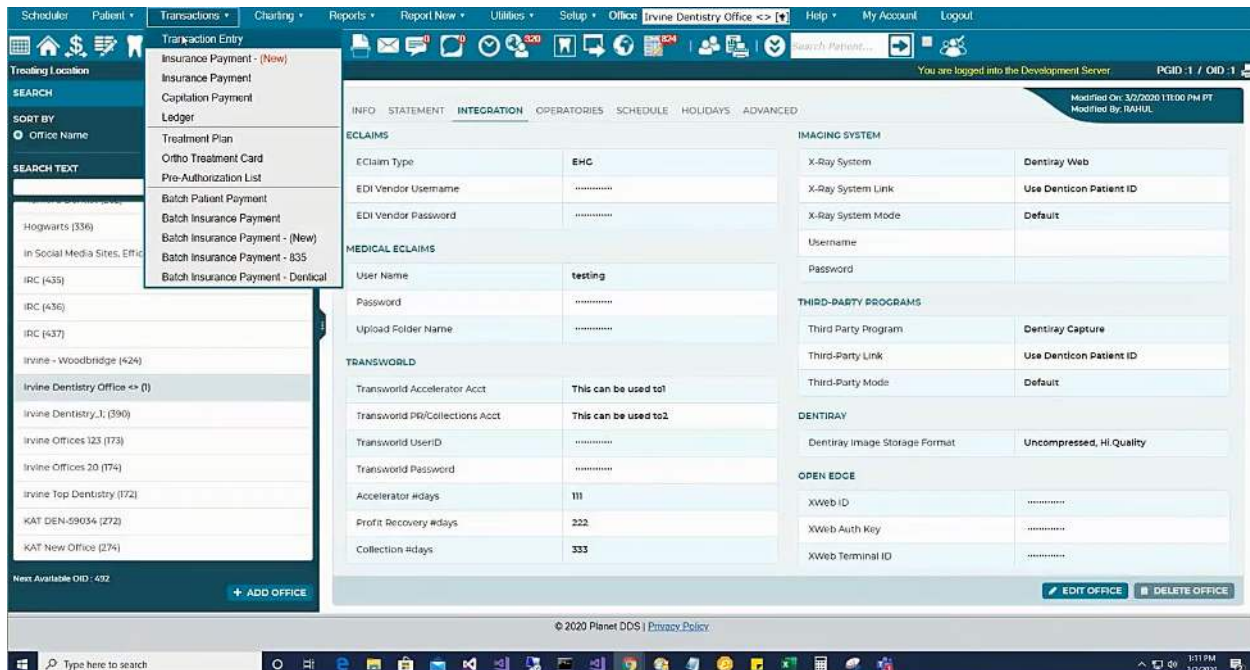
Pm	Date	Patient	Office	A	Code	Th	Surf	N	Description	Bill	Dur	Pdtr	Est Pat	Est Ins	Amount
	3/2/2020	Pham	IRC	P	FFF			N	Wgeqgw	0	2728		-55.00		-55.00
	3/2/2020	Pham	IRC		ACMVD				Balance Moved to Contract	0	2728		-500.00		-500.00
	3/2/2020	Pham	IRC		ACDWN				Contract DownPayment	0	2728		55.00		55.00
	3/2/2020	Pham	IRC	P	FFF			N	Wgeqgw	0	2728		-66.00		-66.00
	3/2/2020	Pham	IRC		ACMVD				Balance Moved to Contract	0	2728		-500.00		-500.00
	3/2/2020	Pham	IRC		ACDWN				Contract DownPayment	0	2728		66.00		66.00
	3/2/2020	Pham	IRC	P	FFF			N	Wgeqgw	0	2728		-38.56		-38.56
	3/2/2020	Pham	IRC	R	PP001				3MT PAT Debit Card	0	2728		-120.00		-120.00

Receipt sample:

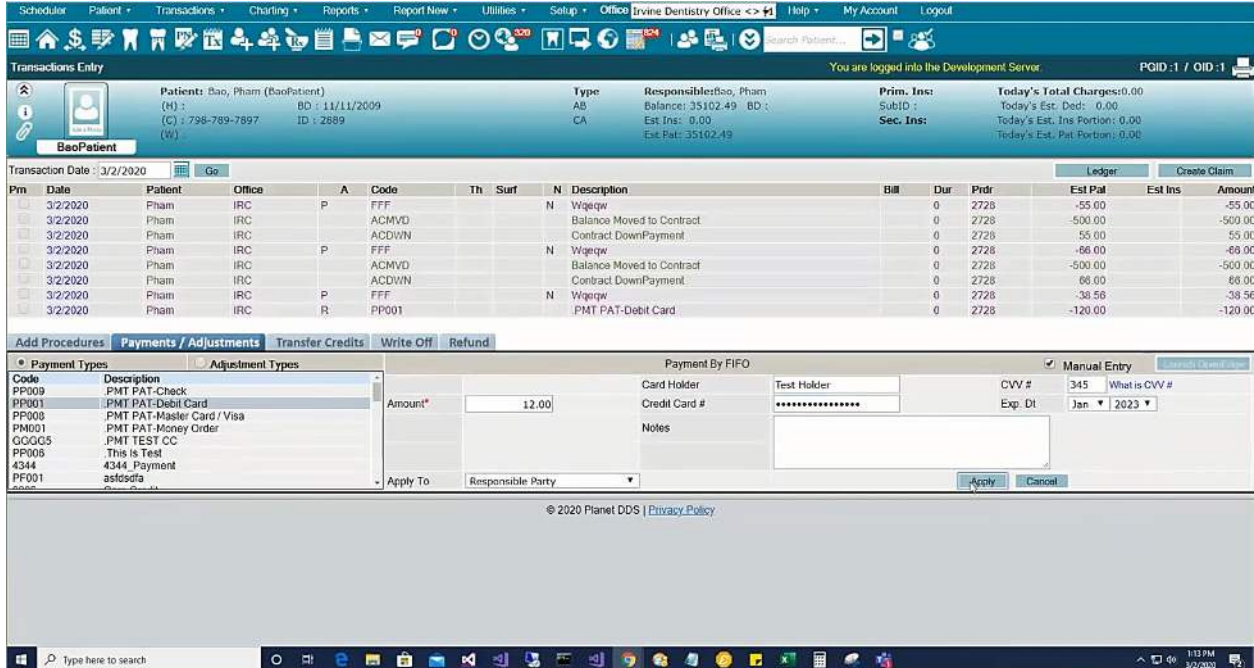


- [Credit – Purchase](#) (via manual entry)

1. On the main screen, go to the Transactions tab and then click the **Transaction Entry** option.

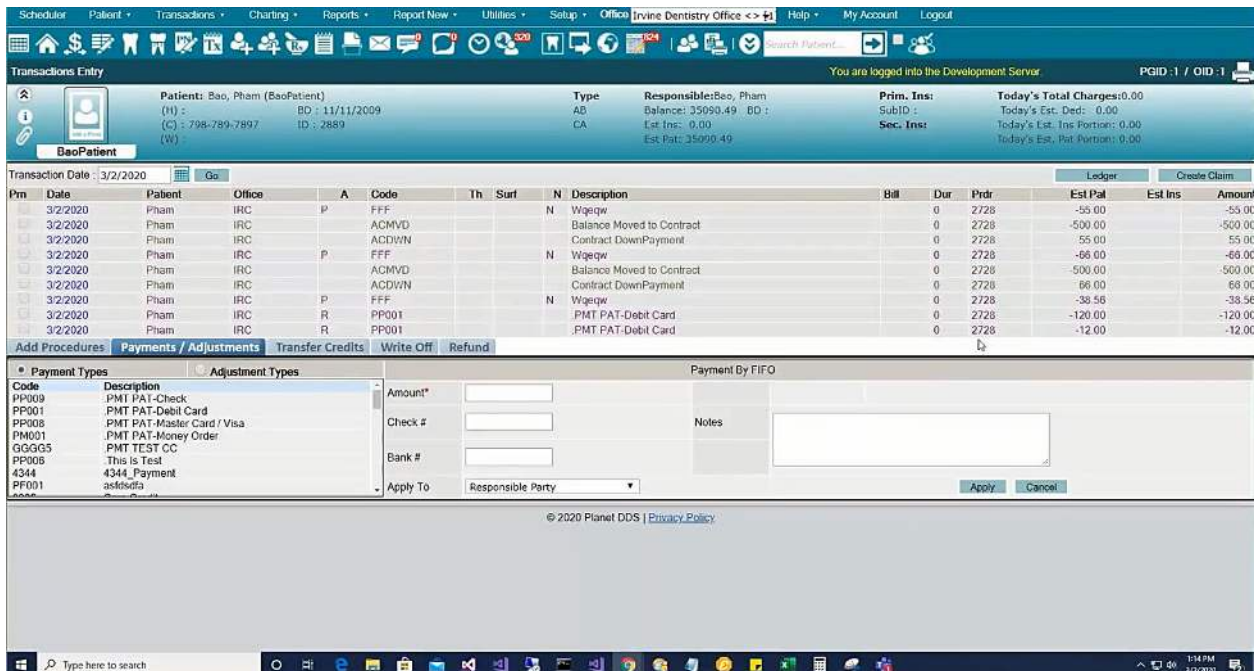


- Go to the **Payments / Adjustments** subtab. Select a payment type and enter an amount. Enable the **Manual Entry** checkbox to display the card information fields. Enter the cardholder name and card information. Click on the **Apply** button.



The screenshot shows the Planet DDS software interface. At the top, there is a navigation bar with various icons and a search bar. Below this, the patient information for Bao, Pham (BaoPatient) is displayed, including their ID, birth date, and insurance details. The main area shows a list of transactions with columns for Date, Patient, Office, Code, Description, and Amount. The 'Payments / Adjustments' subtab is active, and a form for entering a payment is shown. The form includes fields for Amount (12.00), Card Holder (Test Holder), Credit Card #, CVV #, Exp. Dt, and a checkbox for 'Manual Entry' which is checked. The 'Apply' button is highlighted.

- Transaction completes.



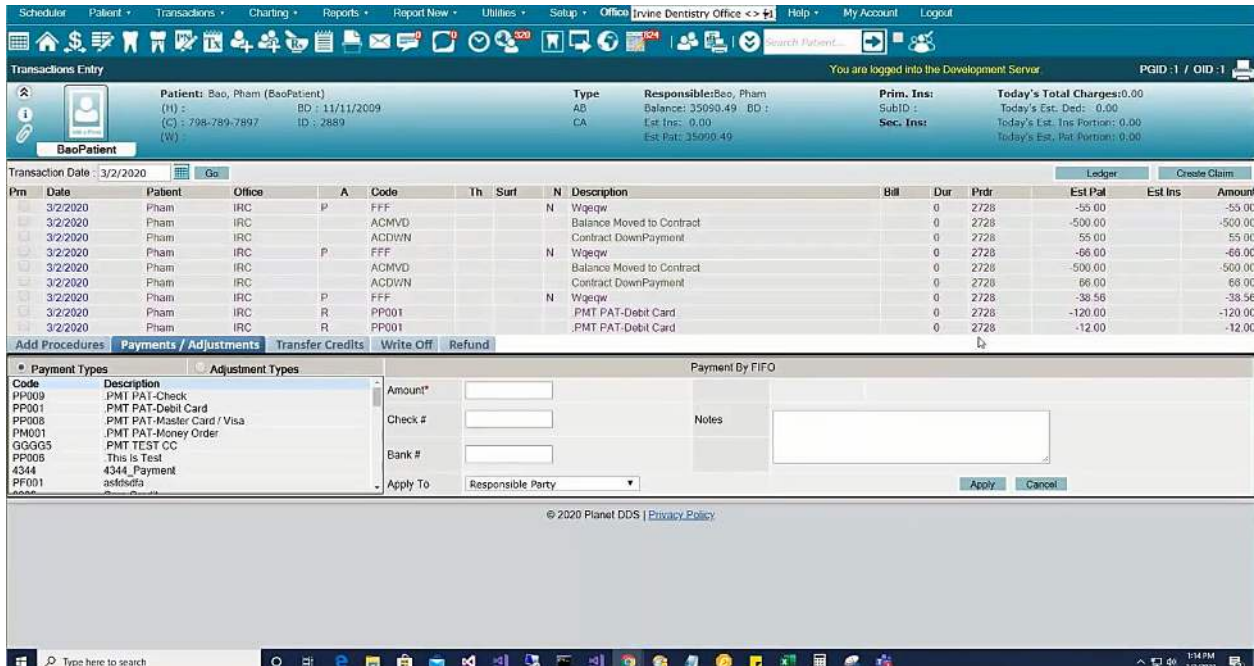
The screenshot shows the Planet DDS software interface after the transaction is completed. The patient information and transaction list are the same as in the previous screenshot. The 'Payments / Adjustments' subtab is still active, but the form for entering a payment is now empty, and the 'Apply' button is no longer highlighted. The 'Manual Entry' checkbox is still checked.

Receipt sample:

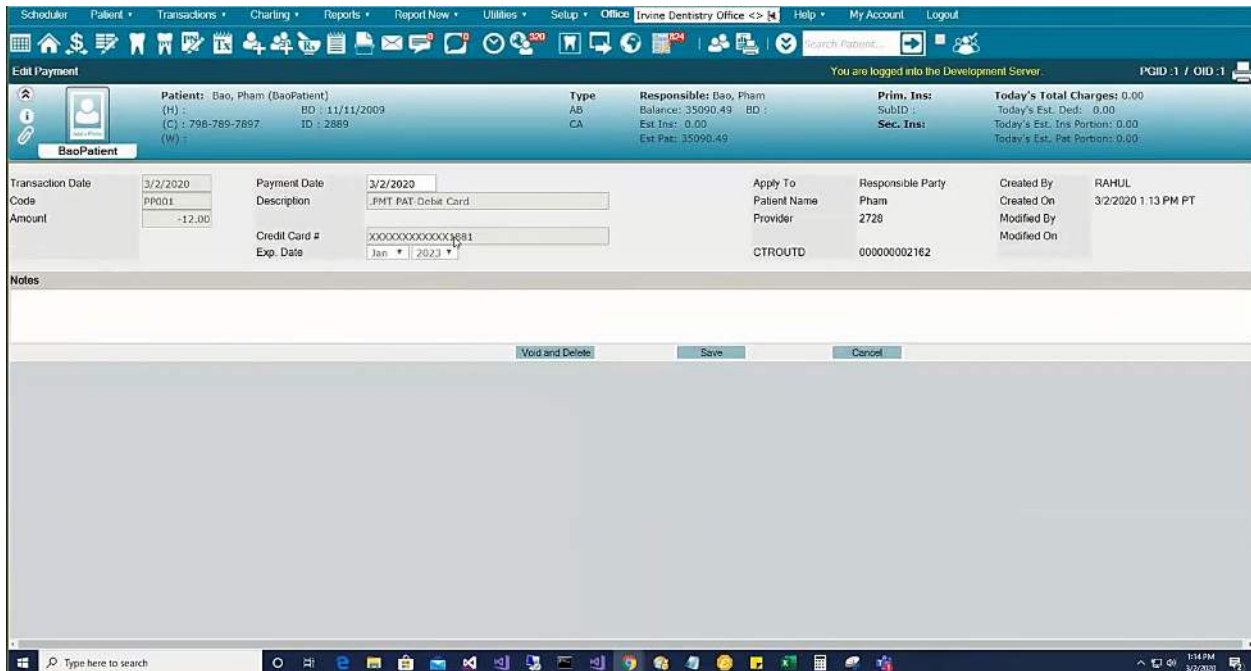


- [Credit – Void](#)

1. On the Transaction Entry screen, select a transaction from the list by clicking on the date.



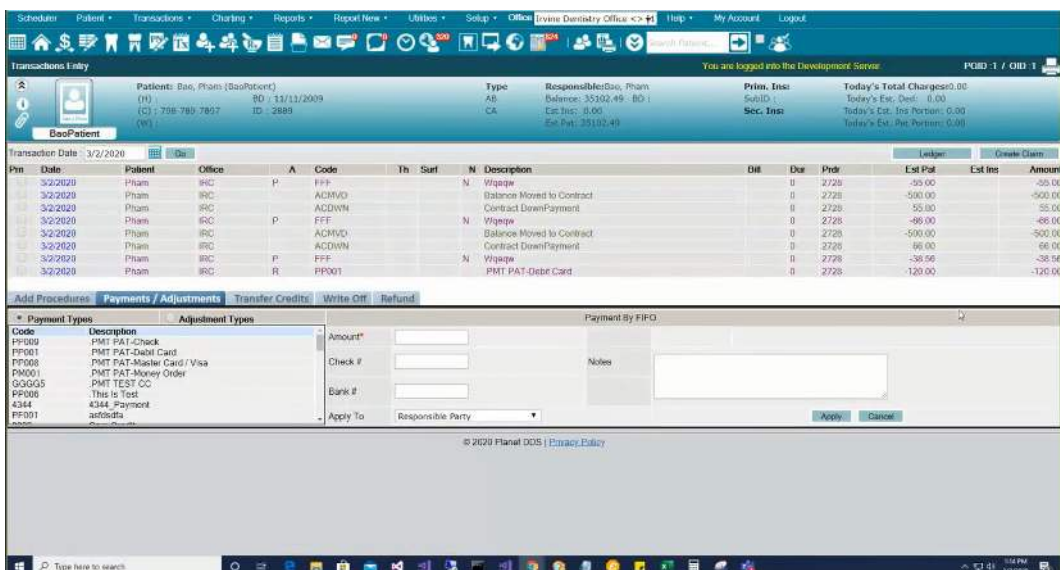
2. Click on the **Void and Delete** button.



3. Click **OK**.



4. Transaction completes.





- [Credit – Dependent Refund](#)

1. On the main screen, go to the Transactions tab and then click the **Transaction Entry** option.

2. Go to the **Payments / Adjustments** subtab. Select an Adjustment type and then a transaction from the list by clicking on the Trans ID. Enter a note if preferred. Click on the **Apply** button.

### 3. Transaction completes.

**Transactions Entry**

Patient: Name Last Name L., First Name FirstN X (Mark)  
 (H) : 777-778-7878 BD : 2/25/1988  
 (C) : 454-787-8786 ID : 64  
 (W) : 333-333-3333 3333

Type: Responsible: R Last Name RL, R First RF D  
 Balance: -70383.09 BD : 2/29/2000  
 Est In: 19148.84  
 Est Pat: 89531.93

Prim. Ins: Borg Regeneration  
 454-545-4545 SubID : 2345686132222222222  
 Sec. Ins: 2526\_D\_C  
 123-412-3412

Today's Total Charges: 0.00  
 Today's Est. Ded: 0.00  
 Today's Est. Ins Portion: 0.00  
 Today's Est. Pat Portion: 0.00

Prn	Date	Patient	Office	A	Code	Th	Surf	N	Description	Bill	Dur	Pdr	Est Pat	Est Ins	Amount
	3/2/2020	First Name FirstN IRC			D2001	UR*			Test_OneOrMoreToothReq	0		BAODEN	0.00	0.00	0.00
	3/2/2020	First Name FirstN IRC			D2001	LA*			Test_OneOrMoreToothReq	0		BAODEN	0.00	0.00	0.00
	3/2/2020	First Name FirstN IRC			D2001	LA*			Test_OneOrMoreToothReq	0		BAODEN	0.00	0.00	0.00
	3/2/2020	First Name FirstN IRC		P	RTR3				TransFirst Refund	0		BAODEN	2.00	0.00	2.00

Transaction Date: 3/2/2020

Add Procedures | Payments / Adjustments | Transfer Credits | Write Off | Refund

Payment Types: PP000, PP001, PP008, PM001, GGGG5, PP006, 4344, PF001

Adjustment Types: [Empty]

Payment By FIFO

Amount\*: [Input Field]  
 Check #: [Input Field]  
 Bank #: [Input Field]  
 Apply To: Responsible Party

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**Edit Payment**

Patient: Name Last Name L., First Name FirstN X (Mark)  
 (H) : 777-778-7878 BD : 2/25/1988  
 (C) : 454-787-8786 ID : 64  
 (W) : 333-333-3333 3333

Type: Responsible: R Last Name RL, R First RF D  
 Balance: -70383.09 BD : 2/29/2000  
 Est In: 19148.84  
 Est Pat: 89531.93

Prim. Ins: Borg Regeneration  
 454-545-4545 SubID : 2345686132222222222  
 Sec. Ins: 2526\_D\_C  
 123-412-3412

Today's Total Charges: 0.00  
 Today's Est. Ded: 0.00  
 Today's Est. Ins Portion: 0.00  
 Today's Est. Pat Portion: 0.00

Credit card adjustment processed through Open Edge cannot be deleted. Only payment date can be changed.

Transaction Date	Payment Date	Code	Description	Apply To	Patient	Created By	Created On	Modified By	Modified On	TransFirst ID
3/2/2020	3/2/2020	RTR3	TransFirst Refund	Responsible Party	First Name FirstN X BAODEN	RAJUL	3/2/2020 1:18 PM PT			2048

Notes

Save Cancel

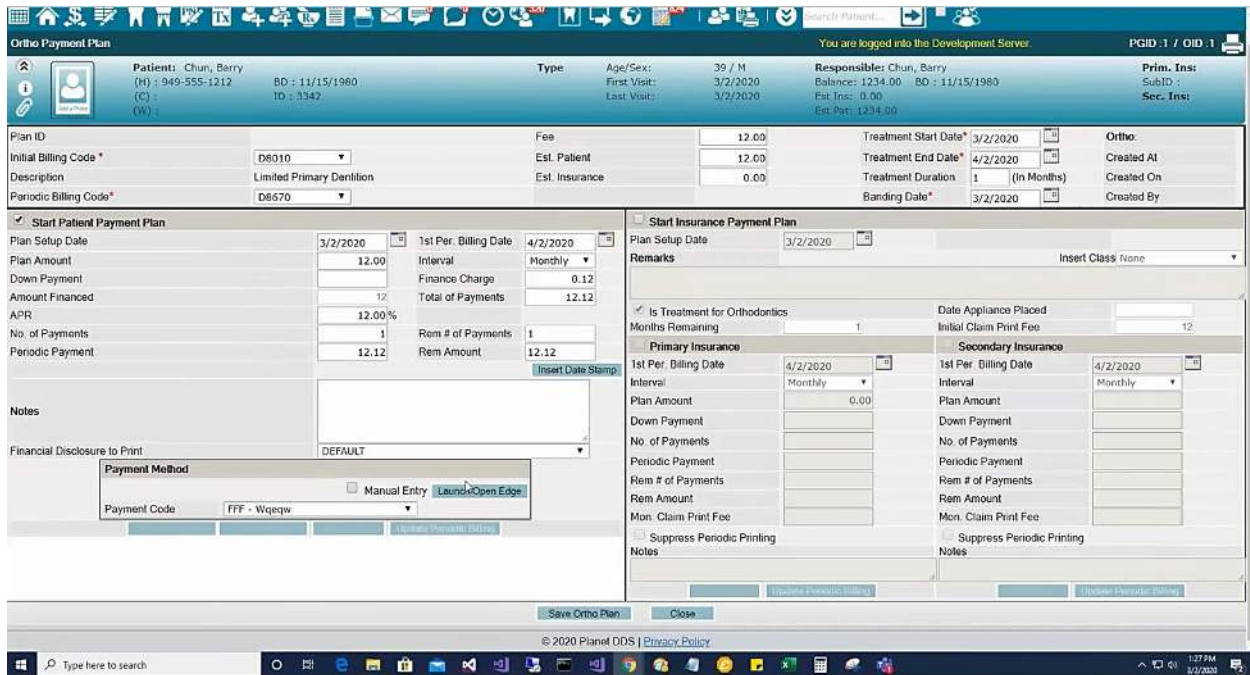
- [Tokenization – Create](#)

1. On any screen, search for the patient by using the search bar on the top-right of the screen.

2. Click on the **PatID** (patient ID) of the patient you wish to select.

PatID	RPID	Chart #	Last Name	First Name	MI	NickName	Birth Date	SSN	Phone #	Email	Type	Prdr	Next Recall	Medicaid ID
3140	2824		Chun	Ava			11/22/1990		(H) 949-555-1212 (W)	asdt@gmail.com		3940	6/23/2020	
3147	2824		Chun	Aegfa			11/22/1990		(H) 949-555-1212 (W)			A1B2	6/25/2020	
3211	2890		Chun	Babs			11/15/1990		(H) 949-555-1212 (W)	valid@example.com		ABCD		
3340	3018		Chun	Abby			11/15/1990		(H) 949-555-1212 (W)	amyichun@hotmail.com		3940		
3341	3019		Chun	Barry			11/15/1990		(H) 949-555-1212 (W)	amyichun@hotmail.com		3940		
3342	3020		Chun	Barry			11/15/1990		(H) 949-555-1212 (W)	amyichun@hotmail.com		3940		
3367	3044		Chun	Ar			11/15/1990		(H) 949-555-1212 (W)	sdrsdtsd@idskjtik.com		3940		
3603	3278		Chun	Emma			11/15/1990		(H) 949-555-1212 (W)	amyncm@yahoo.com		3940		
3626	3299		Chun	Beatrice			11/15/1998	XXX-XX-8788	(H) 949-555-1212 (W)		CA	3940		
1087	615	SDFSDF	Chun	Albio			5/29/1967		(H) 714-555-2498 (W)			0011		

3. Click on the **Launch OpenEdge** button.



4. Click **OK**.



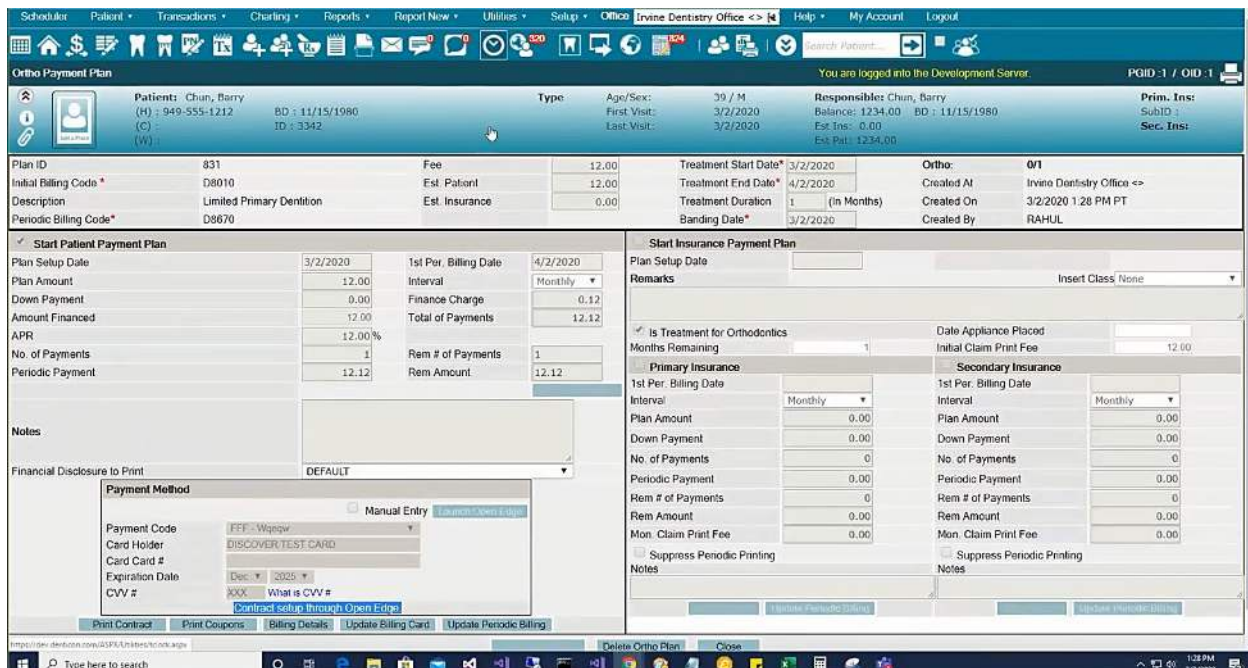
5. Follow the prompts on the connected device.



6. Transaction completes.

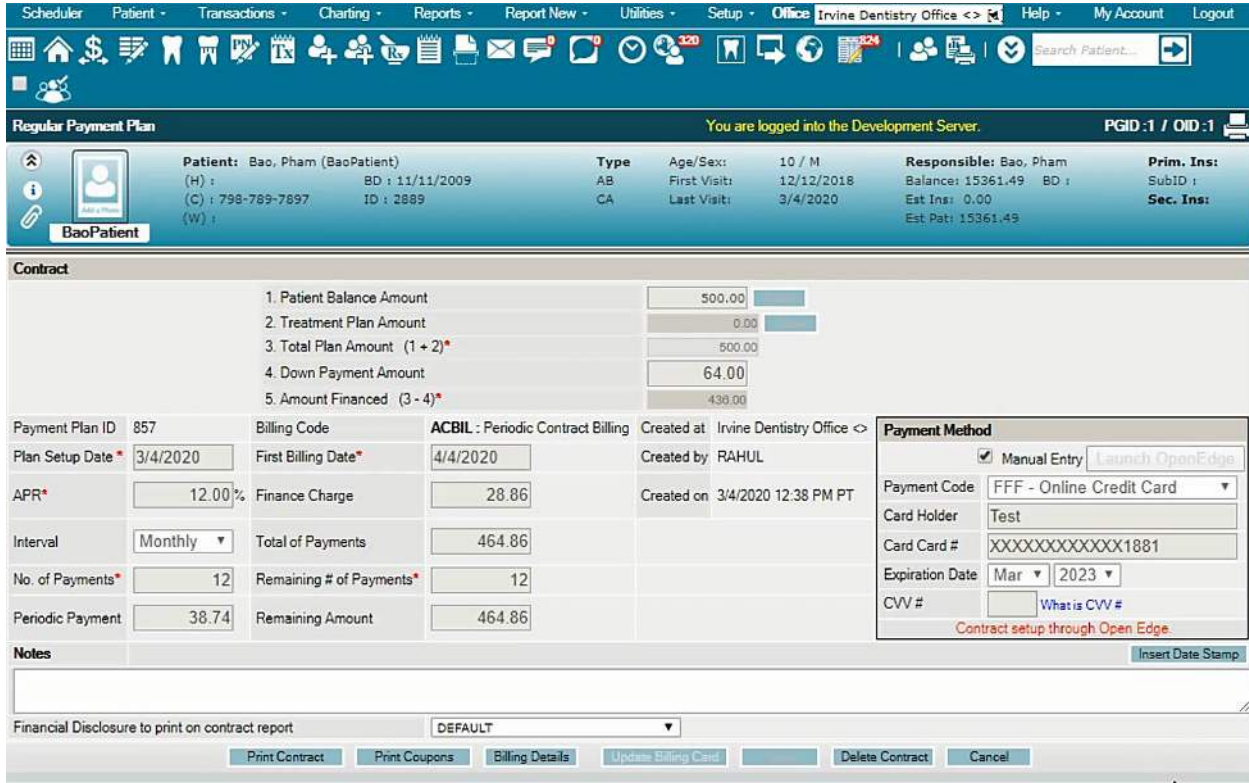


7. Contract is set up within the patient's record.



- [Tokenization – Delete](#)

1. Under the patient's record, click on the **Delete Contract** button.



**Regular Payment Plan** You are logged into the Development Server. PGID:1 / OID:1

**Patient:** Bao, Pham (BaoPatient)  
(H) : BD : 11/11/2009  
(C) : 798-789-7897 ID : 2889  
(W) :

**Type:** AB  
Age/Sex: 10 / M  
First Visit: 12/12/2018  
Last Visit: 3/4/2020

**Responsible:** Bao, Pham  
Balance: 15361.49 BD :  
Est Ins: 0.00  
Est Pat: 15361.49

**Prim. Ins:** SubID :  
**Sec. Ins:**

**Contract**

1. Patient Balance Amount	500.00
2. Treatment Plan Amount	0.00
3. Total Plan Amount (1 + 2)*	500.00
4. Down Payment Amount	64.00
5. Amount Financed (3 - 4)*	436.00

Payment Plan ID: 857  
Billing Code: ACBIL : Periodic Contract Billing  
Created at: Irvine Dentistry Office <>  
Plan Setup Date: 3/4/2020  
First Billing Date: 4/4/2020  
Created by: RAHUL  
APR: 12.00%  
Finance Charge: 28.86  
Created on: 3/4/2020 12:38 PM PT  
Interval: Monthly  
Total of Payments: 464.86  
No. of Payments: 12  
Remaining # of Payments: 12  
Periodic Payment: 38.74  
Remaining Amount: 464.86

**Payment Method**

Manual Entry [Launch OpenEdge](#)

Payment Code: FFF - Online Credit Card  
Card Holder: Test  
Card Card #: XXXXXXXXXXXX1881  
Expiration Date: Mar 2023  
CVV #: [What is CVV #](#)

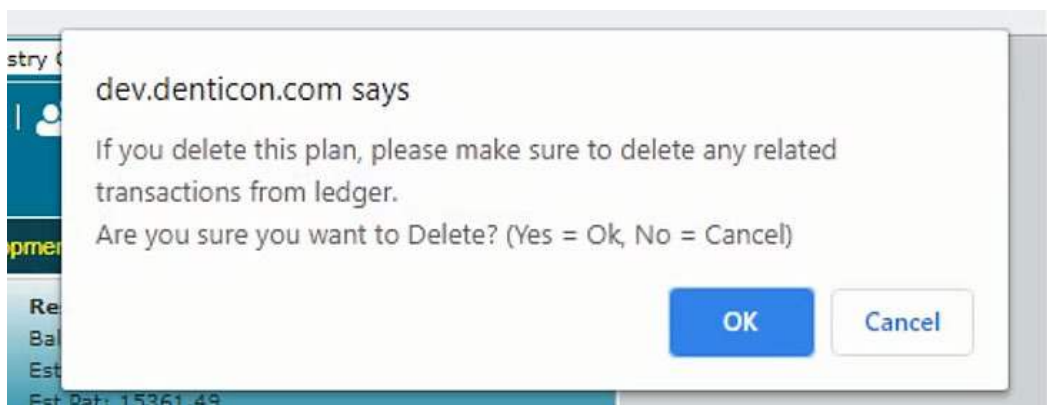
Contract setup through Open Edge.

**Notes** [Insert Date Stamp](#)

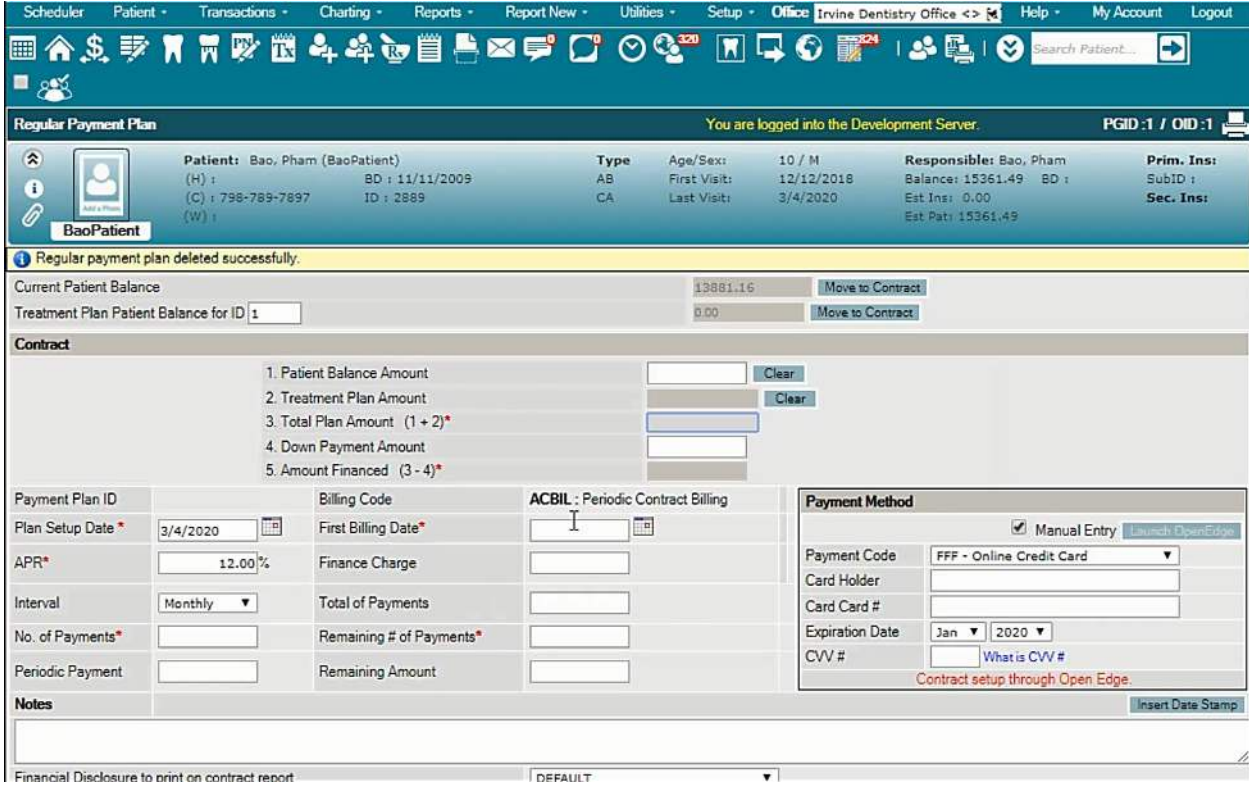
Financial Disclosure to print on contract report: DEFAULT

[Print Contract](#) [Print Coupons](#) [Billing Details](#) [Update Billing Card](#) [Delete Contract](#) [Cancel](#)

2. Click **OK**.



3. Card is deleted.



Scheduler Patient Transactions Charting Reports Report New Utilities Setup Office Irvine Dentistry Office Help My Account Logout

Regular Payment Plan You are logged into the Development Server PGID:1 / OID:1

**Patient:** Bao, Pham (BaoPatient)  
(H) : BD : 11/11/2009  
(C) : 798-789-7897 ID : 2889  
(W) :

**Type:** AB  
Age/Sex: 10 / M  
First Visit: 12/12/2018  
Last Visit: 3/4/2020

**Responsible:** Bao, Pham  
Balance: 15361.49 BD :  
Est Ins: 0.00  
Est Pat: 15361.49

**Prim. Ins:** SubID :  
**Sec. Ins:**

1 Regular payment plan deleted successfully.

Current Patient Balance 19881.16 Move to Contract  
Treatment Plan Patient Balance for ID 1 0.00 Move to Contract

**Contract**

1. Patient Balance Amount  
2. Treatment Plan Amount  
3. Total Plan Amount (1 + 2)\*  
4. Down Payment Amount  
5. Amount Financed (3 - 4)\*

Payment Plan ID Billing Code ACBIL : Periodic Contract Billing  
Plan Setup Date \* 3/4/2020 First Billing Date \*  
APR\* 12.00% Finance Charge  
Interval Monthly Total of Payments  
No. of Payments\* Remaining # of Payments\*  
Periodic Payment Remaining Amount

**Payment Method**  
 Manual Entry Launch OpenEdge  
Payment Code FFF - Online Credit Card  
Card Holder  
Card Card #  
Expiration Date Jan 2020  
CVV # What is CVV #  
Contract setup through Open Edge.

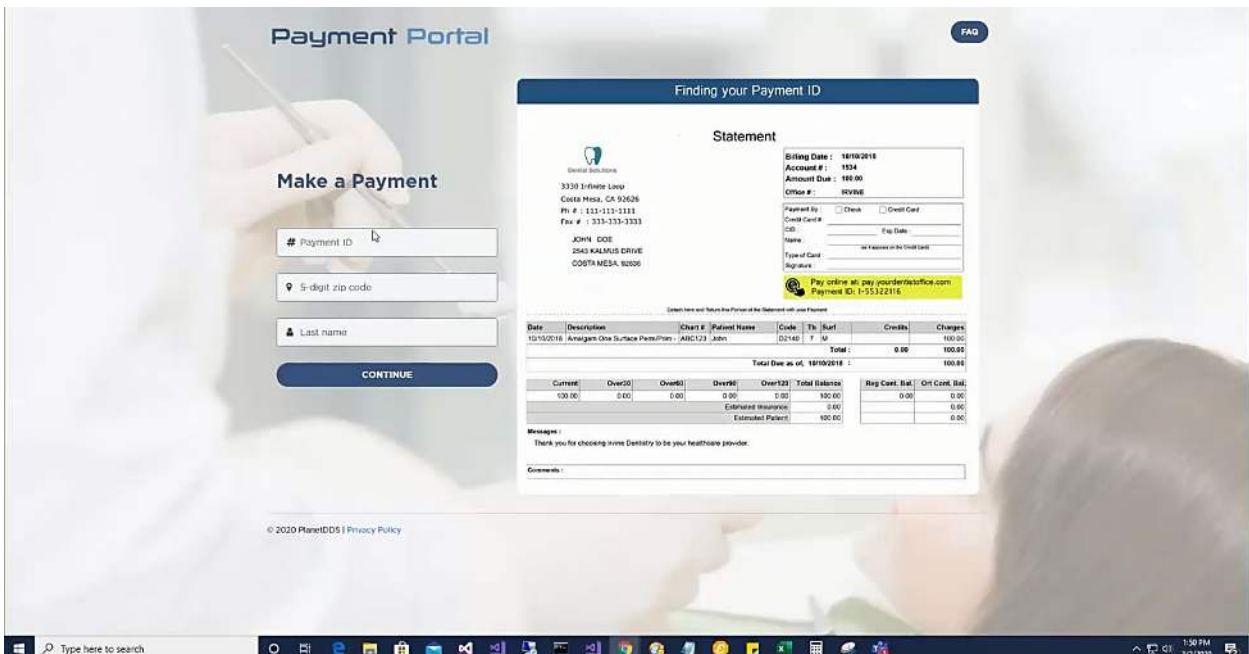
Notes Insert Date Stamp

Financial Disclosure to print on contract report DEFAULT

- [Credit – Purchase](#) (via Payment Portal)

Note: Payment Portal will allow patients to pay a specific invoice using a Payment ID and other personal information.

1. Enter the **Payment ID**, **Zip Code**, and **Last name** of the patient. Click **CONTINUE**.



Payment Portal

FAQ

Make a Payment

# Payment ID  
5-digit zip code  
Last name

CONTINUE

Finding your Payment ID

Statement

Dental Solutions  
3330 Irvine Loop  
Costa Mesa, CA 92626  
Ph #: 333-333-3333  
Fax #: 333-333-3333

JOHN DOE  
2543 KALAMUS DRIVE  
COSTA MESA, 92626

Billing Date: 18/10/2018  
Account #: 1524  
Amount Due: 100.00  
Office #: 8V88E

Payment by:  Check  Credit Card  
Credit Card #:   
Exp Date:   
Name:   
Type of Card:   
Signature:   
Pay online at: pay.yourdentistryoffice.com  
Payment ID: 1-15322118

Date	Description	Chart #	Patient Name	Class	To	Start	Credits	Charges
15/10/2018	Amalgam One Surface Perm/Phan	A65233	John	02140	F	M		100.00
							<b>Total:</b>	<b>0.00 100.00</b>
							<b>Total Due as of: 18/10/2018:</b>	<b>100.00</b>
	Current	Over30	Over60	Over90	Over120	Total Balance	Reg Cost. Bal	Out Cont. Bal
	100.00	0.00	0.00	0.00	0.00	100.00	0.00	0.00
						Estimated Insurance	0.00	0.00
						Estimated Patient	100.00	0.00

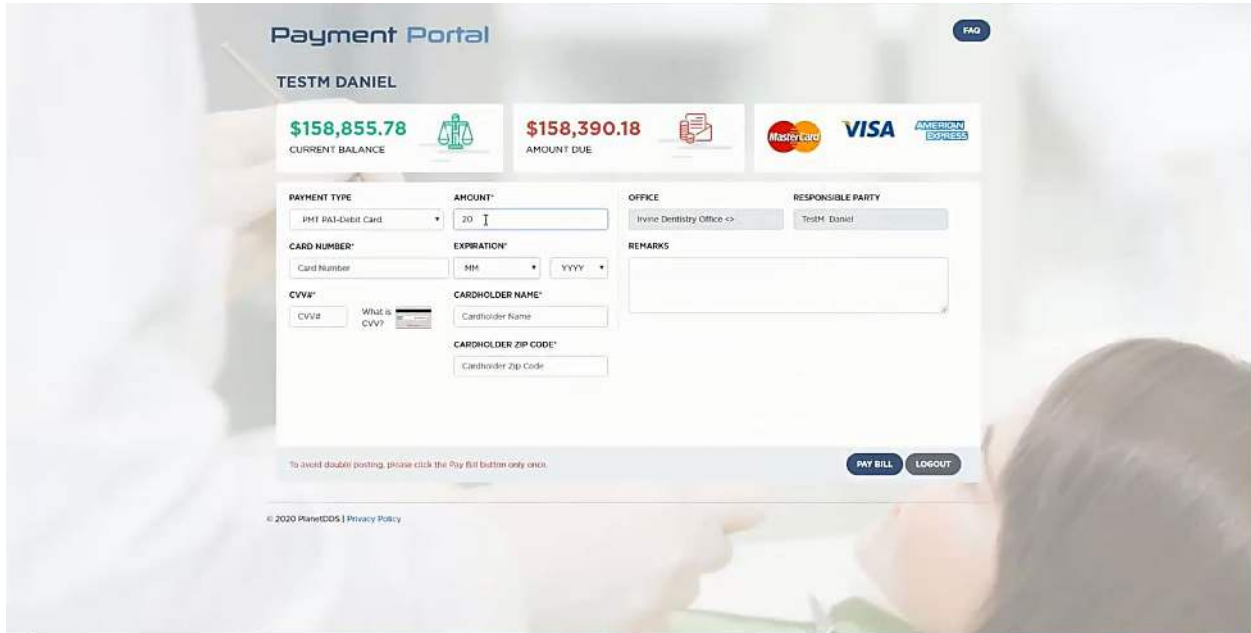
Messages:  
Thank you for choosing Irvine Dentistry to be your healthcare provider.

Comments:

© 2020 PlanetDDS | Privacy Policy

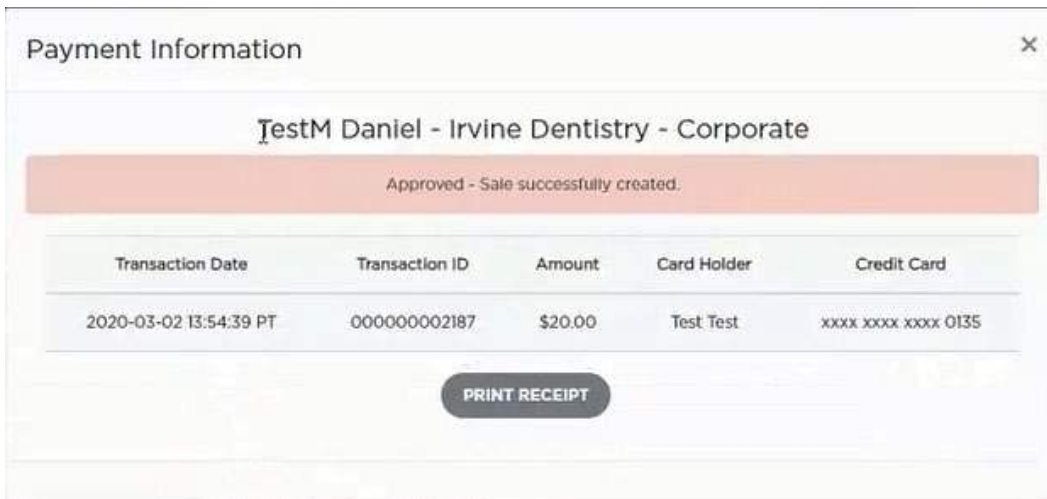
Type here to search 1:50 PM 3/2/2020

- Select the payment type. Enter an amount. Enter the card information and click on the **PAY BILL** button.



The screenshot shows the 'Payment Portal' interface for 'TESTM DANIEL'. It displays a current balance of \$158,855.78 and an amount due of \$158,390.18. The payment form includes fields for Payment Type (PMT Bal-Direct Card), Amount (\$20.00), Card Number, Expiration (MM/YY), CVV2, Cardholder Name, and Cardholder Zip Code. The Office is 'Irvine Dentistry Office' and the Responsible Party is 'TestM Daniel'. A 'PAY BILL' button is visible at the bottom right.

- Transaction approves.



The screenshot shows the 'Payment Information' confirmation screen. It displays the transaction details for 'TestM Daniel - Irvine Dentistry - Corporate'. A message states 'Approved - Sale successfully created.' Below this is a table with the following data:

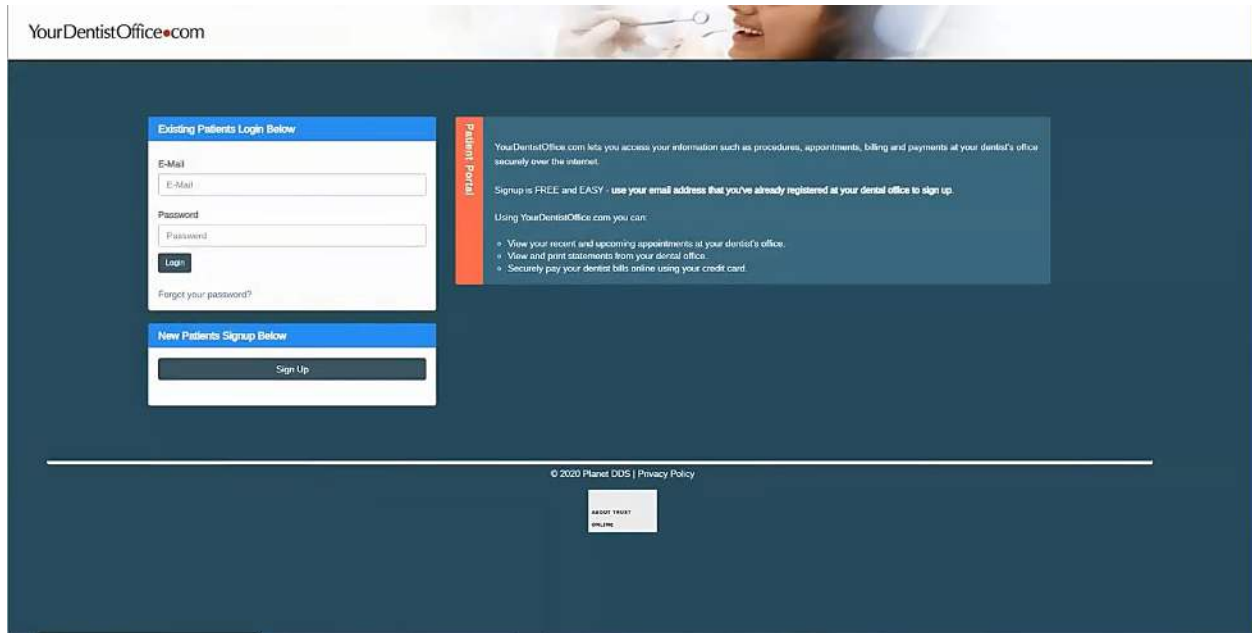
Transaction Date	Transaction ID	Amount	Card Holder	Credit Card
2020-03-02 13:54:39 PT	000000002187	\$20.00	Test Test	xxxx xxxx xxxx 0135

A 'PRINT RECEIPT' button is located at the bottom of the screen.

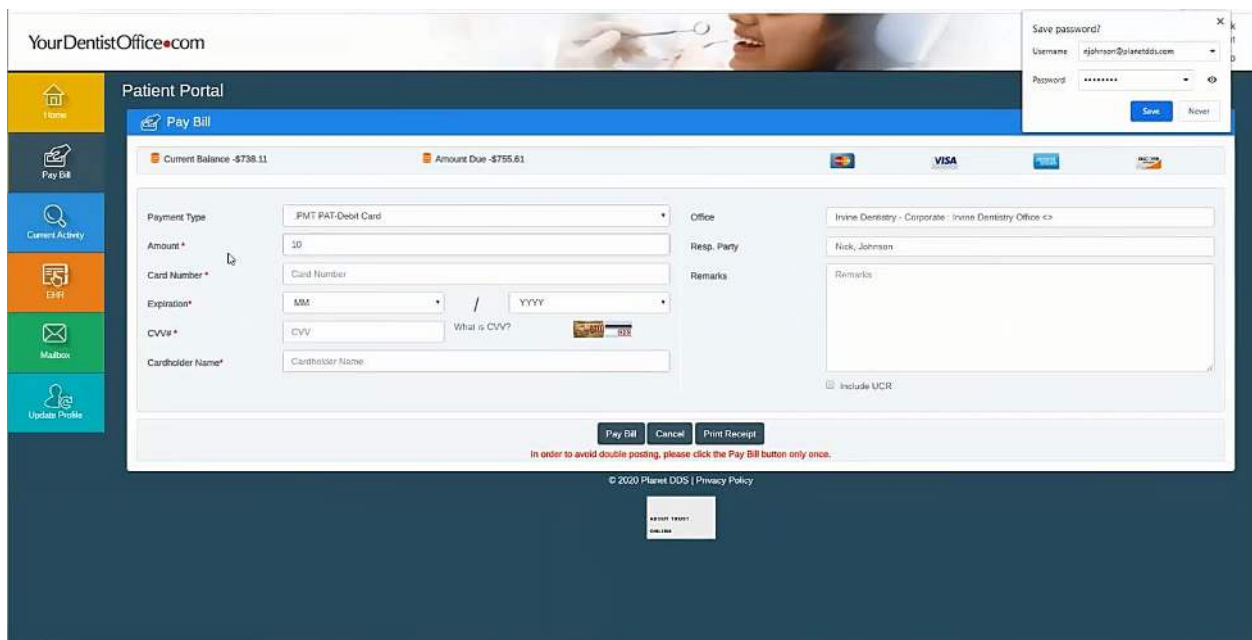


- [Credit – Purchase](#) (via Patient Portal)

1. Log in.



2. Select the payment type. Enter an amount. Enter the card information and then click on the **Pay Bill** button.



3. Transaction approves.

