Setting up BPAY on Invoice Templates

FYDO supports BPAY on patient invoices with no integration or API work. The client sets up their BPAY details once per location, then we add three tokens to their invoice template.

How BPAY works on an invoice:

- Biller code: a fixed ID the client gets when they sign up for BPAY with their bank.
- Reference number (CRN): generated by FYDO from either the patient's MRN or the invoice number, sometimes padded with zeros or a prefix.

Setup is at the location level, not per invoice or per doctor. A facility with more than one location in FYDO needs BPAY set up on each location they want it on.

Step 1: Set up BPAY on the location

The facility can only do this once their bank has issued their BPAY details.

1. Go to Settings > Locations and open the location.
2. Scroll down to the BPAY section
3. Enter the Sub Biller code. This comes from the bank or BPAY.
4. Enter the Internal Site Code. This also comes from the bank or BPAY.
5. In the Based on dropdown, choose what the BPAY reference is generated from:
    - MRN: the patient keeps the same reference across all their invoices.
    - Invoice number: each invoice gets its own reference, which makes it easier to match payments to invoices.
6. Save.

The client should check with their bank that the reference option they pick meets the bank's format requirements.

Step 2: Add the BPAY tokens to the invoice template

The tokens are listed in our public wiki.

Clinic Tokens: Tokens – Invoice (Clinic)
Hospital Tokens: Tokens – Invoice (Hospital) – FYDO Wiki

The three BPAY tokens:

- `<<BPAYsb>>`: the Sub Biller, provided by the bank or BPAY.

- `<<BPAYISC>>`: the Internal Site Code, provided by the bank or BPAY.
- `<<BPAYref>>`: the BPAY reference, based on the MRN or invoice number set in Settings > Locations.

Step 3: Upload the template

To upload the finished template:

1. Go to Settings > Template.
2. Upload it under the appropriate invoice template