

# Import BPoint, Stripe or other external Patient Deposits & Receipts

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Careright provides users with the capability to import the Bpoint payment report into the system. This functionality proves valuable, especially for clients who collect booking fees in advance, with the funds subsequently deposited into bank accounts. The system can efficiently record numerous such transactions daily against multiple patient records.

For users with accounting permissions, under **Reconciliation > Import BPoint/Stripe/Other transactions** there is the ability to import a CSV of patient deposits.

1. From **Dashboard**.
2. Click **Reconciliation**.
3. Click **Import BPoint/Stripe/Other transactions**
4. Select the **Receipt to Location** from drop down.
5. Select the **Payment Report Type**.
6. Click **Choose file** and select the applicable CSV file.
7. Click the **Submit** button.

## Payment Reports

[Dashboard](#) / [Reconciliation](#)

Upload

Receipt to Location

Perth

Payment Report Type

Bpoint

Required format

Example data

Merchant number,Transaction type,Biller code,Customer reference 1,Customer reference 2,Customer reference 3,Merchant reference,Total amount,Surcharge,Original amount,Receipt number,Card type,Processed date,Processed time,Transaction source,Settlement date,Amount,Settlement date 2,Card Type 2,Day,Month,Year,Date,"Merchant reference (Left, 2)",CRN3,Manual Day  
1353189291530660,PAYMENT,1286020,18621128,428175053,,,505.26,4.26,501,34434004389,MC,20230614,152005,POR,20230614,505.26,20230614,VC + MC,14,06,2023,14/06/2023,,,CareRight,

Choose a file to upload

Choose file No file chosen

Submit

On upload, you will see the list of generated Receipts, Refunds; and any transactions that could not be imported under **Unprocessable** heading.

The system relies on unique external transaction identifiers and will prevent duplicates, so simply correct errors and re-upload.

## File Format and Additional Information

In this process, CareRight will allow you to import a CSV file with the following columns title;

Merchant number, Transaction type, Biller code, Customer reference 1, Customer reference 2, Customer reference 3, Merchant reference, Total amount, Surcharge, Original amount, Receipt number, Card type, Processed date, Processed time, Transaction source, Settlement date, Amount, Settlement date 2, Card Type 2, Day, Month, Year, Date, Merchant reference (Left, 2), CRN3, Manual Day

Example data

```
Merchant number,Transaction type,Biller code,Customer reference 1,Customer reference 2,Customer reference 3,Merchant reference,Total amount,Surcharge,Original amount,Receipt number,Card type,Processed date,Processed time,Transaction source,Settlement date,Amount,Settlement date 2,Card Type 2,Day,Month,Year,Date,"Merchant reference (Left, 2)",CRN3,Manual Day
1353189291530660,PAYMENT,1286020,18621128,428175053,,,505.26,4.26,501,34434004389,MC,20230614,152005,POR,20230614,505.26,20230614,VC + MC,14,06,2023,14/06/2023,,,CareRight,
```

Please click ["here"](#) for the further details.

For each transaction marked as a Receipt, it creates a new Receipt

- Matching the patient by the Payment Reference Number to their corresponding patient CRN (private account).

For each transaction marked as a Refund, it creates a new Refund linked to the original receipt

- Matching the patient by the Payment Reference Number to their corresponding patient CRN (private account).

Note: If necessary, examples of the required formats will be provided.

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