

Posting Pearly payments into your PMS

Pearly allows patients to pay their bills electronically through the Pearly portal by either ACH, credit/debit card, or digital wallet. Pearly uses Stripe as its merchant processor for payments made through Pearly. Stripe charges the office a processing fee for all transactions. All payments that are made through the Pearly Portal will need to be posted into your practice management software (PMS), as you would do with care credit or other payments made through 3rd parties.

In order to view all processed payments in Pearly that are ready for posting, you will need to complete the following steps:

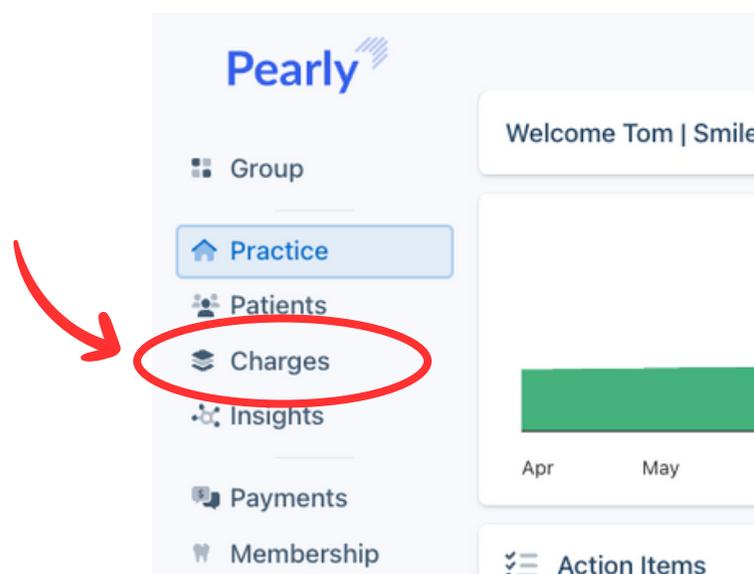
STEP 1

Login with your username and password:

<https://app.pearly.co/>

STEP 2

Navigate to the Charges tab



STEP 3

View any new payments here to be recorded into your PMS

| Patient | Paid Date | Amount | Fees | Net Deposit | Deposit Date | Type | Rec. | Status |
|--------------------------|-----------|----------|--------|-------------|--------------|---------------|------|-----------|
| RK Koopman, Ruth | 8/31/2023 | \$53.40 | \$0.54 | \$52.86 | | Payment | | SUCCEEDED |
| SC Ciappi, Stephen | 8/24/2023 | \$33.30 | \$0.34 | \$32.96 | 8/27/2023 | Payment | ✓ | SUCCEEDED |
| HV van den Brink, Helena | 8/23/2023 | \$100.00 | \$1.00 | \$99.00 | 8/24/2023 | Payment | ✓ | SUCCEEDED |
| KF Field, Kate | 8/22/2023 | \$81.00 | \$0.81 | \$80.19 | 8/23/2023 | Payment | ✓ | SUCCEEDED |
| MG Goossens, Mae | 8/18/2023 | \$50.00 | \$0.50 | \$49.50 | 8/21/2023 | Payment | ✓ | SUCCEEDED |
| BM Meli, Billy | 8/17/2023 | \$87.50 | \$2.84 | \$84.66 | 8/20/2023 | Pay-Over-Time | ✓ | SUCCEEDED |
| BC Cherici, Blake | 8/10/2023 | \$85.00 | \$0.85 | \$84.15 | 8/13/2023 | Payment | ✓ | SUCCEEDED |
| HV van den Brink, Helena | 8/8/2023 | \$100.00 | \$1.00 | \$99.00 | 8/10/2023 | Payment | ✓ | SUCCEEDED |
| ES Steele, Eula | 8/4/2023 | \$91.00 | \$0.91 | \$90.09 | 8/7/2023 | Payment | ✓ | SUCCEEDED |
| CV Valdez, Clarence | 7/25/2023 | \$21.90 | \$0.22 | \$21.68 | 7/27/2023 | Payment | ✓ | SUCCEEDED |

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STEP 4

Select patients and record

Click on the patient's name and toggle the recorded button on to mark that a payment has been successfully posted in the PMS. A green checkmark will appear next to the Status.

Charge
Type: Payment

SUCCEEDED
Recorded

Patient [View Patient](#)

Name: Ruth Koopman
Patient ID: ABC123

Paid - \$53.40

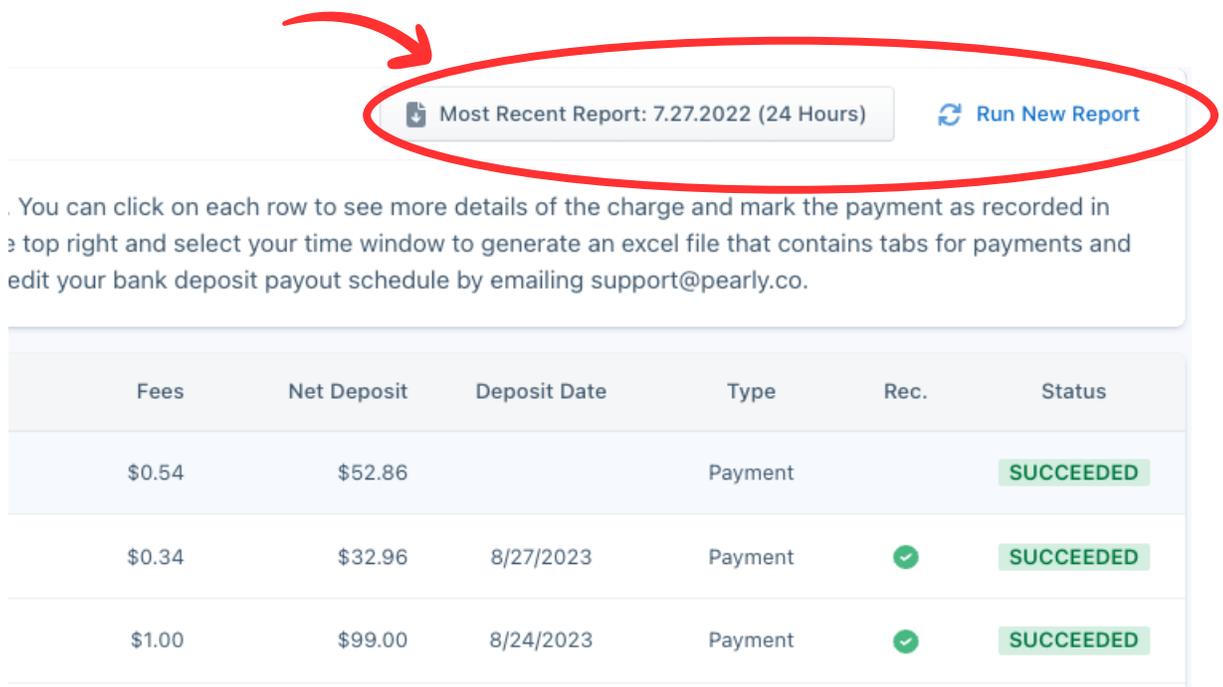
Paid On: 8/31/2023



STEP 5

Generate your processed payments report

If you would like to export a report of all payments made, you can do so by clicking the 'Run Report' button on the top right of the same Charges page. First select your time window and then click the 'Most Recent Report' download button to generate an excel file that contains tabs for payments and payouts.



You can click on each row to see more details of the charge and mark the payment as recorded in the top right and select your time window to generate an excel file that contains tabs for payments and edit your bank deposit payout schedule by emailing support@pearly.co.

| Fees | Net Deposit | Deposit Date | Type | Rec. | Status |
|--------|-------------|--------------|---------|------|-----------|
| \$0.54 | \$52.86 | | Payment | | SUCCEEDED |
| \$0.34 | \$32.96 | 8/27/2023 | Payment | ✓ | SUCCEEDED |
| \$1.00 | \$99.00 | 8/24/2023 | Payment | ✓ | SUCCEEDED |



If you have any questions, please do not hesitate to ask your Team Leader or contact support@pearly.co.

