

# Tokens and Credits

How to use the tokens and credits systems

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# Tokens and Credits

## Overview

Tokens and Credits are a way to track account balances for individual patients.

## Tokens

Tokens represent individual treatments, so 1 token = 1 treatment. The token system can be used when selling package deals or doing promotions. Let's say you're running a special deal of 5 treatments for \$50. You'll assign a patient 5 tokens when they buy the package deal. They can then use those tokens to pay for future treatments. For information on how to use credits to pay for a treatment, see [The Checkin Transaction](#).

When a patient has tokens, a blue ticket icon will appear next to their name on the schedule. You can mouse over the icon to see how many tokens they have.



## Credits

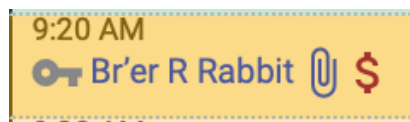
The credits system tracks dollar amounts owed to or by a patient. Like tokens, a patient can use a specific dollar amount of credit to pay for treatment. For information on how to use credits to pay for a treatment, see [The Checkin Transaction](#).

The credits tracking system will track money a patient owes to the clinic, by showing a negative balance. For example, if you charge a late cancellation fee, this will be tracked via patient credits and balances. For more information on how to use the credits system to track cancellation fees, see the [Using Tokens and Credits for Payments and Fees](#).

When a patient has a positive credit balance, a blue dollar sign icon will appear next to their name on the schedule. You can mouse over the icon to see the amount.



When a patient has a negative credit balance, a red dollar sign icon will appear next to their name on the schedule. You can mouse over the icon to see the amount.



The patient's credit history on their [Patient Profile](#) page will show when credit has been used to pay for treatments, cancelation fees, etc:



15

Cow **Clarabelle D. Cow** AKA: Moo  
clarabelle@disney.com | (615) 555-1212

FIRST APPOINTMENT  
May 21, 2020

TOKENS  
0

CREDIT BALANCE  
\$ 50.00

Clarabelle has \$ 50.00 credit

| Optional description for credit | 0.00                                      | Add      |
|---------------------------------|-------------------------------------------|----------|
| Date                            | Description                               | Amount   |
| 2020-08-12 16:23:10             | CNCL: Aug 12 2020 11:00 am w Alexa Hulsey | (-20.00) |
| 2020-08-12 10:34:40             | Used for payment                          | (-20.00) |
| 2020-08-11 12:26:17             | CNCL: Aug 11 2020 9:40 am w Alexa Hulsey  | (-20.00) |
| 2020-07-27 16:04:17             | Used for payment                          | (-40.00) |
| 2020-06-30 16:28:47             | Prepaid                                   | 150.00   |

**[Go to the next section: Using Tokens and credits for payments and fees.](#)**

# Using tokens and credits for payments and fees

## Using for payments

Patients have the option of using tokens and/or credits to pay for their treatments.

### Use Patient Token to Pay For Treatment

|                |                          |
|----------------|--------------------------|
| Use Token (15) | <input type="checkbox"/> |
|----------------|--------------------------|

If a patient has at least one token they can use one to pay the treatment amount as entered in the transaction. This will adjust the balance of the transaction. Added line items total will remain and will need to be paid. Clicking Save will reduce the patient's tokens by one.

### Use Patient Credit to Pay

|                      |                                     |
|----------------------|-------------------------------------|
| Use Credit (\$75.00) | <input checked="" type="checkbox"/> |
|----------------------|-------------------------------------|

If a patient has credit it will appear in the transaction. Credit can be used to pay for the entire transaction including extras and the treatment. If the credit is less than the total it will reduce the total transaction by the amount of credit and the rest will need to be paid.

## Using for Fees

Tokens and credits can also be used when a patient owes money to the clinic, for example for a cancellation fee.

### Use Patient Token to Pay Cancellation Fee

Check the "take a token" box in the cancel popup - this will deduct one token from their account:

Cancel Appointment

✕

☒ Take A Token

Add Cancellation Charge to the Patient

0

⌵

Add a note

CNCL: Aug 12 2020 12:10 pm  
w Alexa Hulseay

☐ Email the patient

Close

Confirm

**Note: You should only check this box if the patient has tokens in their account. Otherwise you'll give them a negative token balance.**

## Use Patient Credit to Pay Cancellation Fee

If a patient has a positive credit balance, the cancellation fee will automatically be deducted from their account when you confirm the cancellation and charge. The patient's credit history on their [Patient Profile](#) page will show when credit has been used to pay for treatments, cancellation fees, etc:

Cow **Clarabelle D. Cow** AKA: Moo

clarabelle@disney.com | (615) 555-1212

FIRST APPOINTMENT

May 21, 2020

✎ TOKENS

0

✎ CREDIT BALANCE

\$ 50.00

Clarabelle has \$ 50.00 credit

Optional description for credit

0.00



Add

| Date                | Description                               | Amount   |
|---------------------|-------------------------------------------|----------|
| 2020-08-12 16:23:10 | CNCL: Aug 12 2020 11:00 am w Alexa Hulsey | (-20.00) |
| 2020-08-12 10:34:40 | Used for payment                          | (-20.00) |
| 2020-08-11 12:26:17 | CNCL: Aug 11 2020 9:40 am w Alexa Hulsey  | (-20.00) |
| 2020-07-27 16:04:17 | Used for payment                          | (-40.00) |

**Go to the next section: Manually changing credit/debit and token balances**

# Manually changing credit/debit and token balances

**Note:** to see how to add tokens, credits or debits to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).

You can manually add tokens, add credits and debits, and change account balances on a patient's account from the [Patient Profile](#) page.

## Manually changing account balances

You can manually change an account balance - for example, waiving a cancellation fee - from the [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:



Dog **Goofy P. Dog**

goofy@disney.com | (615) 555-1212

FIRST APPOINTMENT  
February 23, 2020

TOKENS  
0

CREDIT BALANCE  
\$ -20.00

Goofy has \$ -20.00 credit

Optional description for credit

0.00

Add

| Date                | Description                               | Amount   |
|---------------------|-------------------------------------------|----------|
| 2020-08-11 12:53:17 | CNCL: Aug 11 2020 10:30 am w Alexa Hulsey | (-20.00) |

Enter your optional description, the dollar amount, and click Add:

Goofy has \$ **-20.00** credit

---

| Date                | Description                               | Amount          |
|---------------------|-------------------------------------------|-----------------|
| 2020-08-11 12:53:17 | CNCL: Aug 11 2020 10:30 am w Alexa Hulsey | <b>(-20.00)</b> |

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:



**Dog Goofy P. Dog**

goofy@disney.com | (615) 555-1212

FIRST APPOINTMENT  
**February 23, 2020**

TOKENS  
**0**

CREDIT BALANCE  
**\$ 0.00**

---

Goofy has \$ **0.00** credit

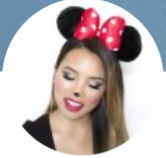
---

| Date                | Description                               | Amount          |
|---------------------|-------------------------------------------|-----------------|
| 2020-08-11 12:54:20 | Waived CNCL fee 8/11/20                   | 20.00           |
| 2020-08-11 12:53:17 | CNCL: Aug 11 2020 10:30 am w Alexa Hulsey | <b>(-20.00)</b> |

## Adding tokens

**Note:** to see how to add tokens to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).

Here's how to manually add tokens to a patient account, outside of a checkin or purchase transaction. Under the patient's name on their [Patient Profile](#) page, you'll see Tokens - click that to expand the tokens window, which includes their token history:


**Minnie Mouse**

minnie@disney.com | (615) 555-1212

FIRST APPOINTMENT

February 19, 2020

✎ TOKENS

0

✎ CREDIT BALANCE

\$ 0.00

Minnie has 0 tokens

Optional description for token

0



Add

| Date                | Description      | Amount |
|---------------------|------------------|--------|
| 2020-04-15 11:02:48 | Used             | (-1)   |
| 2020-04-15 10:26:13 | Used             | (-1)   |
| 2020-04-15 10:25:38 | Used             | (-1)   |
| 2020-04-15 10:24:21 | Used             | (-1)   |
| 2020-04-14 19:48:47 | Used             | (-1)   |
| 2020-04-09 12:43:28 | Used             | (-1)   |
| 2020-04-09 12:43:05 | Used             | (-1)   |
| 2020-04-01 11:53:53 | Checkin Reversal | 1      |
| 2020-04-01 11:49:49 | Checkin Reversal | 1      |

Enter your optional description for tokens, the number of tokens, and click Add:

Minnie has 0 tokens

Bought some tokens

5



Add

You'll see the new balance of tokens under the patient's name and the most recent entry for tokens at the top of the history:



**Minnie Mouse**  
minnie@disney.com | (615) 555-1212

FIRST APPOINTMENT  
February 19, 2020

TOKENS  
5

CREDIT BALANCE  
\$ 0.00

Minnie has 5 tokens

Optional description for token

0

Add

| Date                | Description        | Amount |
|---------------------|--------------------|--------|
| 2020-08-11 12:31:20 | Bought some tokens | 5      |

## Deleting tokens

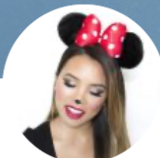
Note: if a patient chooses to pay for treatment with a token, the token will automatically be deducted from their account during the checkin transaction. For more information, please see [The Checkin Transaction](#).

To manually delete tokens from a patient's account, follow the instructions above for manually adding tokens. Instead of entering a positive number (i.e., 5), you'll enter a negative number for the amount of tokens you want to delete (i.e., -5). Once you click Add, their account balance will be updated.

## Adding credits

**Note: to see how to add credits to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).**

You can manually add dollar amount credits to a patient's account from their [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:



**Minnie Mouse**

minnie@disney.com | (615) 555-1212

12

FIRST APPOINTMENT

February 19, 2020

TOKENS

5

CREDIT BALANCE

\$ 0.00

---

Minnie has \$ 0.00 credit

Optional description for credit

0.00

⬆  
⬇  
⬆

Add

| Date                | Description                                 | Amount   |
|---------------------|---------------------------------------------|----------|
| 2020-04-16 11:44:20 | Used for payment                            | (-45.00) |
| 2020-04-01 11:19:22 | CNCL: Feb 20 2020 10:50 am w Alexa Hulseley | (-5.00)  |
| 2020-02-18 18:22:32 | Checkin Reversal                            | 20.00    |
| 2020-02-18 18:21:57 | Used for payment                            | (-20.00) |
| 2020-02-18 18:21:24 |                                             | 50.00    |

Enter your optional description for credits, the dollar amount, and click Add:

Minnie has \$ 0.00 credit

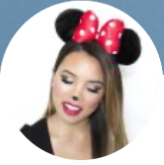
Mickey bought her credit

20

⬆  
⬇  
⬆

Add

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:



Minnie Mouse

minnie@disney.com | (615) 555-1212

12

FIRST APPOINTMENT

February 19, 2020

TOKENS

5

CREDIT BALANCE

\$ 20.00

Minnie has \$ 20.00 credit




# Adding debits/money owed

**Note:** to see how to add debits/money owed to a patient account during a checkin or purchase transaction, please see [Purchasing Tokens and Credits](#).

You can manually add dollar amount that a patient owes from their [Patient Profile](#) page. Under their name, you'll see Credits - click that to expand the credits window, which includes their credit history:



Jiminy Cricket

jiminy@disney.com |

22

FIRST APPOINTMENT

February 21, 2020

TOKENS

0

CREDIT BALANCE

\$ 0.00

Jiminy has \$ 0.00 credit




Enter your optional description for debit and the dollar amount. **Be sure to enter a negative dollar amount, since this is an amount owed.** Click Add:

Jiminy has \$ 0.00 credit

Forgot wallet on 8/20/20

-20

⬆️⬆️

Add

You'll see the new credit balance under the patient's name and the most recent entry for credits at the top of the history:



22

**Jiminy Cricket**  
jiminy@disney.com | 📧

FIRST APPOINTMENT  
February 21, 2020

✎ TOKENS  
0

✎ CREDIT BALANCE  
\$ -20.00

Jiminy has \$ -20.00 credit

Optional description for credit

0

⬆️⬆️

Add

| Date                | Description              | Amount   |
|---------------------|--------------------------|----------|
| 2020-08-11 12:47:57 | Forgot wallet on 8/20/20 | (-20.00) |

[Go to the next section: Purchasing Tokens and Credits](#)

# Purchasing Tokens and Credits

Tokens, credits and debits can all be added to a patient's account during the [Checkin Transaction](#) or using a [Purchase Transaction](#). This is the most efficient way to add tokens, credits and debits to a patient account.

If necessary you can also [manually change credit/debit and token balances](#).

## Adding tokens at checkin

Let's say a patient wants to pay for today's treatment plus 5 tokens for future treatments, all at \$20 each. When you checkin the patient, you'll enter \$20 in the Treatment field, then click the Buy Tokens button. You'll then enter 5 for the number of tokens and \$100 for the amount. This will bring your payment total to \$120. Once you save the transaction, the 5 tokens will automatically be added to the patient's account.

Checkin & Payment

For Tinker Db Bell

At 11:00 AM

| Charges       | Amount |   |
|---------------|--------|---|
| Treatment     | 20     | + |
| 5             | 100    | - |
| Payment Total | 120.00 |   |

Buy Tokens

Buy Credits

Add A Note...

CreditCard

Save

Add a note only

Save

# Adding credits at checkin

Let's say a patient wants to pay for today's treatment plus add \$100 to their account for future treatments or retail item purchases. When you checkin the patient, you'll enter \$20 in the Treatment field, then click the Buy Credits button. You'll then enter \$100 for the amount. This will bring your payment total to \$120. Once you save the transaction, the \$100 credit will automatically be added to the patient's account.

Checkin & Payment

For Tinker Db Bell

At 11:00 AM

| Charges         | Amount |   |
|-----------------|--------|---|
| Treatment       | 20     | + |
| Customer Credit | 100    | - |
| Payment Total   | 120.00 |   |

Buy Tokens

Buy Credits

Add A Note...

CreditCard

Save

Add a note only

Save

# Adding debits at checkin

Let's say a patient comes in for treatment but forgot their wallet. You can add a debit to their account to prompt you to collect payment next time they come in. When you check in the patient, you'll enter the amount they should have paid in the Treatment field, then enter "0" for the payment total. You can also enter an explanation in the Note field. Once you save the transaction, a the negative balance will be added to their account.

Checkin & Payment

For Tinker Db Bell

At 11:00 AM

Charges

Amount +

Treatment

20

+

Payment Total

0

Buy Tokens

\$ Buy Credits

Forgot wallet

Other

Save

Add a note only

Save

## Adding tokens or credits with a purchase transaction

Click on the Purchase Transaction icon - the \$ in the upper right corner of the day's schedule. Once the popup modal appears, follow the steps for entering a token or credit purchase just like you would during a checking transaction.