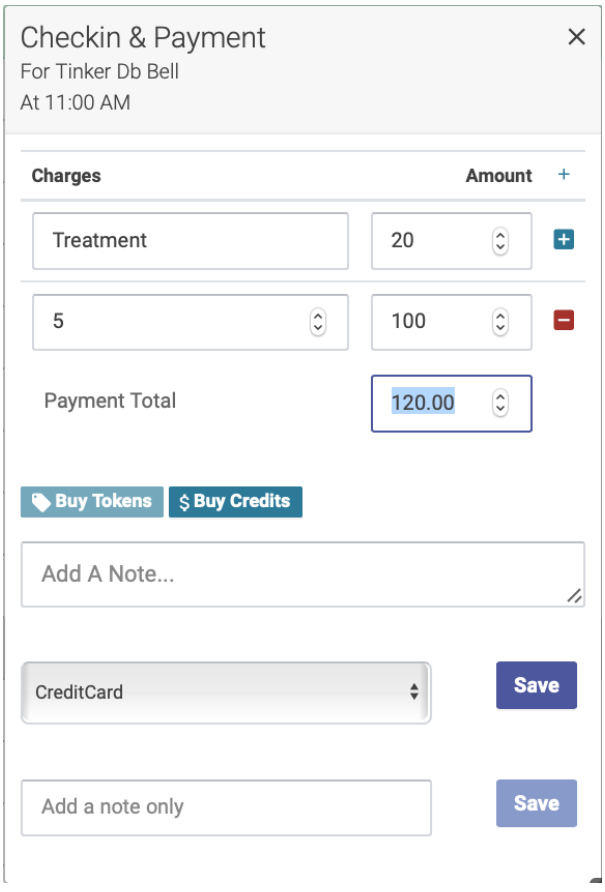
Purchasing Tokens and Credits

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.

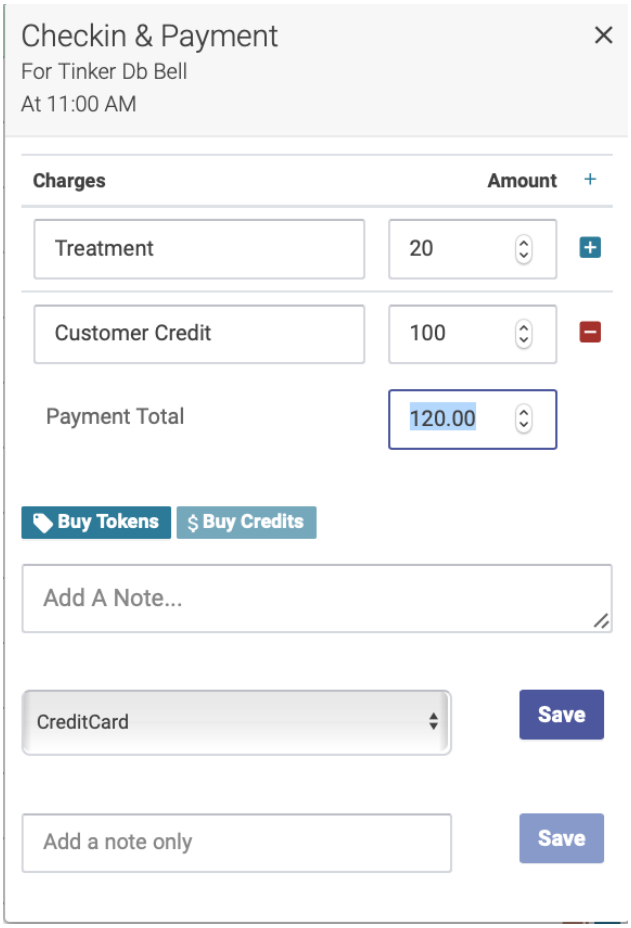
Adding tokens at checkin

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.



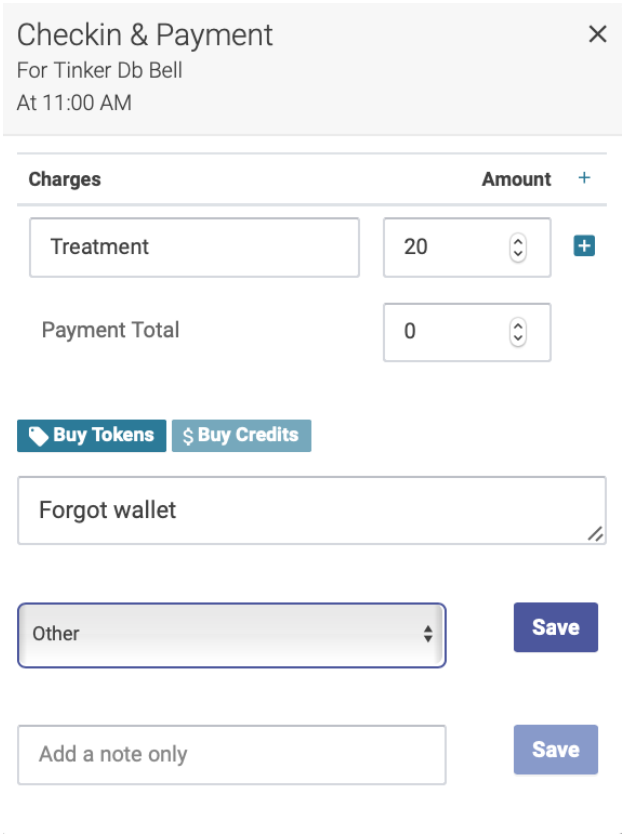
Adding credits at checkin

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.



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.



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.

Revision #2
Created 2020-09-23 20:53:43 UTC by Alexa Hulsey
Updated 2021-01-27 15:54:23 UTC by Alexa Hulsey