

# 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:



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

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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.**

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