

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"/>
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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"/>
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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 Hulsey

☐ 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

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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)

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

Revision #4
Created Wed, Aug 12, 2020 8:15 PM by [Alexa Hulsey](#)
Updated Wed, Jan 27, 2021 3:54 PM by [Joe](#)