Family Record, Financials Tab -Coupons

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Coupons in the system allow administrators to advertise specific discounts as marketing or use coupons as a reward for families in the center. Before setting up coupons, Revenue Type Valid Values, Type - Fee Valid Values, and Rate Categories must be setup. Coupons can be applied as a one-time coupon or for multiple billing periods.

Adding a Coupon to a Student

 Search for the family by entering the last name into the Search box or using the magnifying glass

Se	earch				-											
☆	Hor	ne Fam	ily Payı	ments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff S	ietup Q				
	<	Mi Far Inte	i ller Fami nily ID 413 ernal Note	i ly 3190 :	A - B	C - D K - L	E - F M - N	G - H O - P								
Su	mmary	Family	Children	Parent	s Third Part	y Volunte	eers Co	mmunication		Y - Z	ALL					
	Year	2018	•		Show All 🚫 Yes 🔘 No											
	Statement List									Advanced Search						

2. Select the Financials tab

☆	Home	Fami	ly Pay	ments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	٩					
	<	Miller Family Family ID 413190 Internal Note:						4 Student(s)			Regular Statement Type			436. Balance Ou Add/View Jour	00 Itstanding nal Notes)	•	
Sumr	mary F	amily	Children	Parent	s Third Part	v Volunte	ers Co	ommunicatio	n Auto-Pay	Vacation	Finan	cials R	eceipts	Merge				
Ye	ar	2018	•								Total (\$ 43)	Dutstand 6.00	ing:				Actions	-

3. The click Actions and select Coupons

Vacation	Financials	Receipts	Merge
	Total Outsta \$ 356.00	nding:	Actions -
12101120	10	Fee	Adjustments/Add Fee Charge/Reduce Revenue Make Payment
CW Transa ions - Extra) 12/31/20	ctional- curricular 18	30.0	Deposit Correction Coupons
DCW Trans ions - Extra 12/31/20	actional- curricular 18	30.(Pickup Fee D PrePay Deposit
CW Transac ions - Extra o 12/31/20	tional- curricular 18	30.(Transfer Balance Voided Payments

4. The Coupons section will display current coupons being applied to the

students within the selected family

C	Coupons											
	Name	Coupon	Amount	Start	End	Count	Status	Apply Date				
Ø	Miller, Carson	AM Tuition	10.00%	02/01/2018	02/28/2019	0	D	01/14/2019		×		

- 5. To add a new coupon, complete the Coupon Information section
 - Select Student choose which student to apply the coupon to from the drop-down menu
 - Select Coupon select a coupon from the available coupons.
 Please Note: coupons must be setup prior to this step. If a new coupon needs to be added, click here
 - Redemption Code enter a redemption code, if applicable
 - Coupon Amount (Only for coupons that allow overrides) when a coupon is selected, the section should auto-fill
 - Apply On Date if there a date the coupon should be applied on, select the date from the calendar

- Notes enter any additional notes
- 6. Click Save