

Setup > Coupons

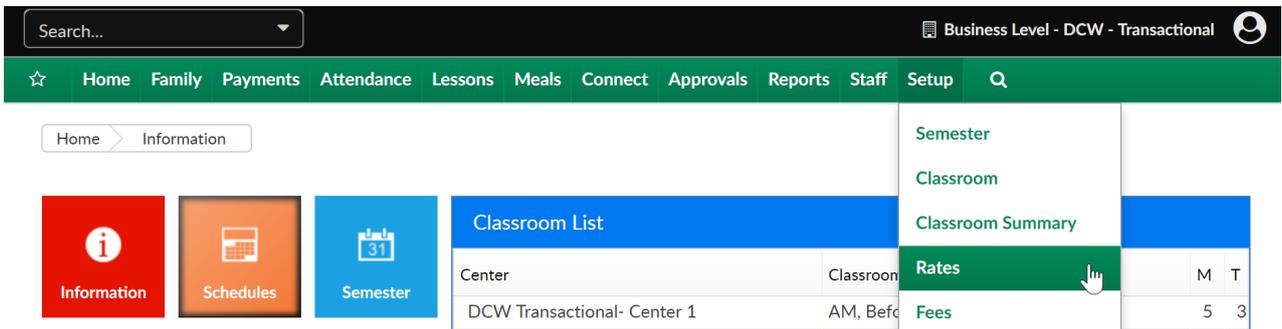
Last Modified on 05/21/2018 1:18 pm EDT

Coupons are discounts that apply to families in the Platform. Coupons can be applied to specific revenue types, such as tuition, registration or activity fees. Before setting up coupons, administrators should have already setup Revenue Type Valid Values, Type - Fee Valid Values and Rate Categories.

Coupons can be applied as a one-time coupon or for multiple billing periods. For coupons to apply to a family's financial ledger, there must be a Type - Fee Valid Value on the family's financial ledger that matches the Revenue Type drop down list setup for the coupon.

For Tuition coupons to be applied, the Tuition Revenue Type should be associated to the Rate Category.

From the main menu bar select Setup then select Rates.



The screenshot shows a software interface with a top navigation bar and a main content area. The top navigation bar is dark green and contains a search box on the left and the text 'Business Level - DCW - Transactional' on the right. Below the navigation bar is a green menu bar with various options: Home, Family, Payments, Attendance, Lessons, Meals, Connect, Approvals, Reports, Staff, Setup, and a magnifying glass icon. The 'Setup' option is highlighted. Below the menu bar is a breadcrumb trail: Home > Information. There are three large icons: Information (red), Schedules (orange), and Semester (blue). The main content area is titled 'Classroom List' and contains a table with columns for Center, Classroom, Rates, M, and T. The 'Rates' column is highlighted in green, and a mouse cursor is pointing at it. The table data is as follows:

Center	Classroom	Rates	M	T
DCW Transactional- Center 1	AM, Befc	Fees	5	3

Once on the rate page, scroll to the blue menu bar in the middle of the page, click on the icon to display the dropdown menu. Select Setup Coupons.

Setup -> Rates

Rate Sheet Import

Search Panel

Rate Selection Criteria

Show All: No ▾

FILTER

Actions ▾

- Setup Scholarships
- Setup Rate Category
- Setup Rate Offset
- Setup Allocation Period
- Setup Discounts
- Setup Coupons**
- Setup Pre-Bill
- Export Rate Sheet
- Export Rate Sheet - PDF
- Company Rate Export Sheet
- Company Rate Export Sheet(xlsx)

	1	2	3	4	5
	4.25	0.00	0.00	0.00	0.00
	17.00	31.00	47.00	63.00	78.00

(Delete Rate)
Active: Y
CATEGORY: CARE ALL DAY

Enter the name for the coupon in the Coupon Name text box.

If there is an identification code for the coupon, enter the identification number or code for the coupon in the Coupon Code text box.

Enter a brief description for the coupon in the Coupon Description text box.

Add a start date and end date for the coupon in the Start Date and End Date text boxes. These dates determine when a coupon can be selected.

The screenshot shows a 'Coupon' form with the following fields and controls:

- Coupon ID:** Text box
- * Coupon Name:** Text box (highlighted in red)
- Coupon Code:** Text box
- Coupon Description:** Text box
- * Start Date:** Text box (highlighted in red)
- * End Date:** Text box (highlighted in red)
- * Coupon Amount:** Text box
- Coupon Amount Type Code:** Drop-down menu (currently set to 'Dollar')
- Group Code:** Text box
- GL Code:** Text box
- Allow Coupon Selection Date:** Text box
- Number of Billing Periods:** Text box
- * Revenue Type:** Drop-down menu
- * Adjustment Type:** Drop-down menu
- Staff Eligibility:** Radio buttons (Yes , No)
- Coupon Number Required:** Radio buttons (Yes , No)
- Third Party Eligibility:** Radio buttons (Yes , No)
- New Enrollment:** Radio buttons (Yes , No)
- Student Coupon Use Limit:** Text box
- Family Coupon Limit:** Text box
- Disclaimer:** Text box
- Save:** Button

Enter the total amount for the coupon in the Coupon Amount text box.

Select the type of value for the amount entered in the Coupon Amount text box in the Coupon Amount Type Code drop down list.

- Select Dollar to have the amount entered in the Coupon Amount text box assigned as a flat dollar discount.
- Select Percent to have a percentage entered in the Coupon Amount text box be discounted from the family's billing statement.

If necessary, enter the group code for the coupon in the Group Code text box.

If necessary, enter the general ledger code for the coupon in the GL Code text box.

Enter the number of billing periods the coupon will be effective in the Number of Billing Periods text box.

If a coupon will be applied for multiple weeks, the number of weeks must be entered in the Number of Billing Periods text box. If a coupon is for a one time discount, enter 1 in the Number of Billing Periods text box. If the coupon is for tuition in a classroom, a number must be entered in the Number of Billing Periods text box.

If a coupon is applied to a family's financial ledger with multiple billing periods, the coupon will continue to apply the discount until the coupon's billing periods are exhausted, even if the End Date for the coupon has passed.

The image shows a screenshot of a web-based form titled "Coupon". The form contains several input fields and dropdown menus. A red rectangular box highlights the following fields: "Coupon Amount" (text input), "Coupon Amount Type Code" (dropdown menu showing "Dollar"), "Group Code" (text input), "GL Code" (text input), "Allow Coupon Selection Date" (text input), and "Number of Billing Periods" (text input). Other visible fields include "Coupon ID", "* Coupon Name", "Coupon Code", "Coupon Description", "* Start Date", "* End Date", "* Revenue Type" (dropdown), "* Adjustment Type" (dropdown), "Staff Eligibility" (radio buttons for Yes/No), "Coupon Number Required" (radio buttons for Yes/No), "Third Party Eligibility" (radio buttons for Yes/No), "New Enrollment" (radio buttons for Yes/No), "Student Coupon Use Limit" (text input), "Family Coupon Limit" (text input), and "Disclaimer" (text area). A "Save" button is located at the bottom left of the form.

Select the revenue type in the Revenue Type drop down list. This is the fee the coupon will be applied against.

Select the Type - Fee Valid Value that will be displayed on the billing statement for the family in the Adjustment Type drop down list. This is the account that the coupon will be applied to.

If the coupon can be used by employees or staff members in the center,

select Yes in the Staff Eligibility section.

If there is a coupon number that is required for families redeeming the coupon, select Yes in the Coupon Number Required section.

If the coupon can be used by families who are currently third party agency or sponsored families, select Yes in the Third Party Eligibility section.

If the coupon can be used by new enrollment families, select Yes in the New Enrollment section.

The screenshot shows a form with the following fields and options:

- * Revenue Type**: Dropdown menu with "TUIT - Tuition" selected.
- * Adjustment Type**: Dropdown menu with "TUIT - Tuition" selected.
- Staff Eligibility**: Radio buttons for Yes (unselected) and No (selected).
- Coupon Number Required**: Radio buttons for Yes (unselected) and No (selected).
- Third Party Eligibility**: Radio buttons for Yes (unselected) and No (selected).
- New Enrollment**: Radio buttons for Yes (unselected) and No (selected).
- Student Coupon Use Limit**: Text input field.
- Family Coupon Limit**: Text input field.
- Disclaimer**: Large text area.
- Save**: Button at the bottom left.

A red rectangular box highlights the sections from Revenue Type to New Enrollment.

Enter the number of times a student can use a coupon in the Student Coupon Use Limit text box.

Then, enter the number of times a family could use a coupon in the Family Coupon Limit text box.

If there are any disclaimers for the coupon that should be displayed, enter the disclaimers for the coupon in the Disclaimer text box.

When finished, click on the Save button. This will save the coupon for the center.

* Revenue Type
 TUIT - Tuition

* Adjustment Type
 TUIT - Tuition

Staff Eligibility Coupon Number Required
 Yes No Yes No

Third Party Eligibility New Enrollment
 Yes No Yes No

Student Coupon Use Limit Family Coupon Limit

Disclaimer

Save

After clicking on the Save button, the screen will refresh, indicating the save has been successful.

To assign an age range to a coupon, click on the Setup Coupon Range icon, located to the right of the coupon in the Coupon section.

Setup -> Rates -> Coupons

• Coupon was successfully saved.

Add New Coupon Show All Coupons

Coupon Code	Start Date	End Date	Coupon Amount			
<input checked="" type="checkbox"/> \$50 off Tuition <input checked="" type="checkbox"/>	01/01/2011	12/31/2018	50.00			
<input checked="" type="checkbox"/> Free Registration <input checked="" type="checkbox"/>	01/01/2011	12/31/2018	100.00			

Enter the starting age for the coupon in the Age From field. The age entered in the Age From text box is in months.

Then, enter the ending age for the coupon in the Age To field. The age entered in the Age To text box is in months.

When finished, click on the Save button.

\$50 off Tuition

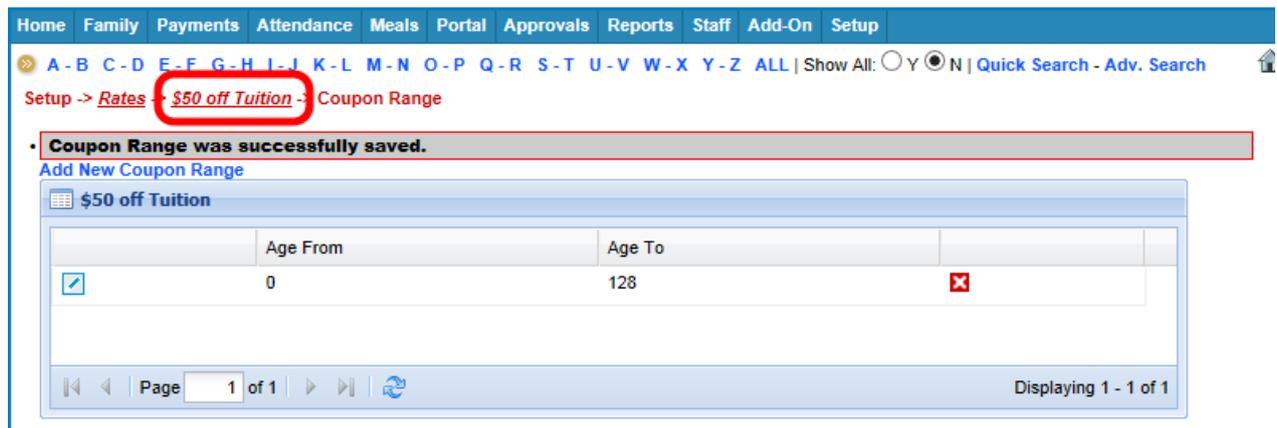
Coupon ID:

Age From

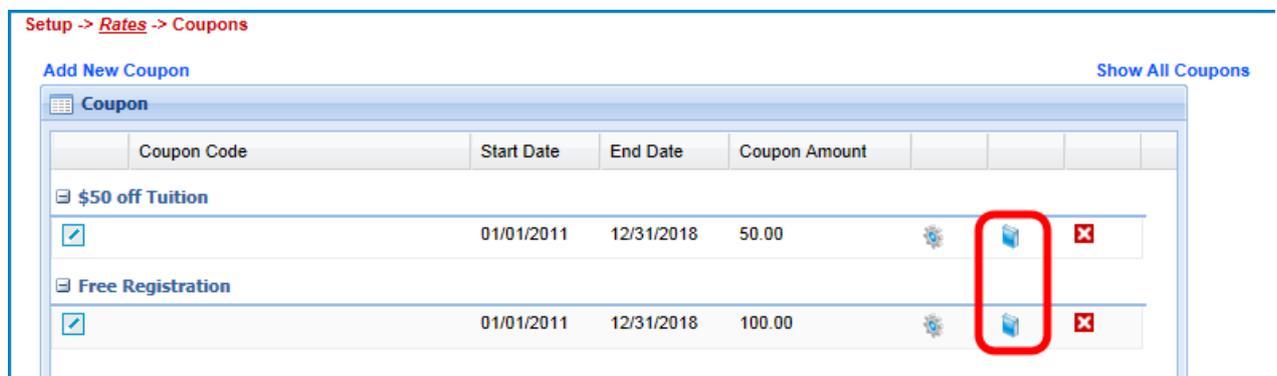
Age To

Save

Click on the name of the coupon in the bread crumb section.



To authorize a coupon to a specific center, brand, division or district, click on the Setup Coupon Restriction icon, in the Coupon section.



Select the center, brand, division or district that will be allowed to use the coupon in the Center, Brand, Division or District drop down lists.

If a center, brand, division or district is selected, the coupon will be allowed to be used at a center with any of the matching criteria. The coupon is not required to match all of the restrictive requirements to be used at a particular center.

When finished, click on the Save button. The screen will refresh, indicating the save has been successful.

☰ \$50 off Tuition Restriction

Restriction ID:

Center

N/A

Brand

N/A

Division

N/A

District

N/A

Save