

Setting up Discounts– Global Reference

Non Unit Specific Training

Material updated July 2020



System Administration Public Service and Outreach Registration System - Sandbox

Fees System | Accounting | Access Control | Contacts | Data Import | Data Export | Enrollment

Tuition Profiles
Discounts
Surcharges
Service Charges
Special Requests
Instruction Methods

Description: * Published Code: *

Effective: * Expiry: *

Date: Jul/09/2020 Date: Jul/09/2020
 days before section start date days before section start date
 Never expires

GL Account: *

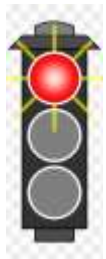
CVIOG Course Revenue - 14100-13100-41500XXX-XXXXX
 Fee component account

Discount: * Discount Type: *

\$ per enrollment Standard
 % per enrollment Multiple sections
 Round % discount to the nearest \$ or

Setting up Discounts

Discounts - are created in the System Administration Module, under Fees. Discount Creation may be limited by costing unit policies, some users may not have access



Discounts are a global area, so make sure you use Unit Initials and Assign proper costing units to a discount when created.

The screenshot shows the 'System Administration' interface for the 'Public Service and Outreach Registration System - Sandbox'. The 'Fees' menu is open, and the 'Discounts' option is selected. The form includes the following fields and options:

- Description:** A text input field.
- Published Code:** A text input field.
- Effective:** Radio buttons for:
 - Date: Jul/09/2020 (with a calendar icon)
 - [] days before section start date
- Expiry:** Radio buttons for:
 - Date: Jul/09/2020 (with a calendar icon)
 - [] days t
 - Never expires
- GL Account:** A dropdown menu with the selected option: 'CVIOG Course Revenue - 14100-13100-41500XXX-XXXX'.
- Discount:** Radio buttons for:
 - [] \$ per enrollment
 - [] % per enrollment
 - Round % discount to the nearest \$
- Discount Type:** Radio buttons for:
 - Standard
 - Multiple sections
 - [] or
 - [] or

Setting up Discounts

Code – System generated. No entry needed or allowed

Description – Use Unit Initials then a description of the discount so that it can be identified easily

Published Code – How the code will appear to the public when registering online. Do not include unit initials here, would be confusing

Applicability – Classify the discount as one that can be used by the public or one that can only be applied by a staff member

Discount Category – How the discount will be applied *This field can not be changed after save.*

- Section – Applies the discount to a course section
- Bundle – Applies the discount to a bundle of courses
- Program Offering – used for International programs, not available for PSO

Details – Public details about what the discount does.

Dates – Allows you to set the effective dates for the use of this discount. You will be required to have a start and end entry to save the discount.

New Discount

Code:* Description:* Published Code:* Applicability: public Discount Category: Section

Details:*

Paragraphs: 0, Words: 0,

Effective:*

Date: Jul/09/2020 days before section start date

Expiry:*

Date: Jul/09/2020 days before section start date Never expires

Setting up Discounts

GL Account – For PSO, always select Fee Component account so that the discount is removed from the payment GL

Discount – This field sets the value of the discount. You can choose to apply a discount 1 of 2 ways

- Fixed \$ Amount Discount – Set a discount to a fixed amount
- Fixed % Discount – Set a discount to a percentage of the registration fee. If you select this method you can also select to round this % to the nearest whole \$

Discount Type– This field sets a qualifier method to how a discount can be applied

- Standard – Discount applied to any eligible registration
- Multiple sections – You can specify a set number of registrations that must occur to become eligible for a discount.
- Group – Requires a registration to be completed by a “Group” participant and include a minimum number of enrollments. This discount can be applied across multiple sections in the same basket

GL Account: *

AR Invoice Asset Receivable Account - ARINVOICE

Fee component account

Discount: *

\$ per enrollment

% per enrollment

Round % discount to the nearest \$

Discount Type:*

Standard

Multiple sections

or more sections

to sections

sections exactly

Group - or more enrollments

Allow group discount to be applied across multiple sections in the same basket.

Setting up Discounts

Coupon Code– This field defines a code that must be entered to achieve the discount. If you leave this field blank, and apply the discount to a eligible registration option, this will be an automatic discount.



If you have a course that offers early pricing, this could be an easy way of allowing early registration, without having to make multiple tuition profiles

Hide Discount Name on public View – This option defines on the website if a visual que is presented to the participant that a discount is available. If you select this option, a discount can still be applied, but the participant will have to know they can enter a code.

How the Discount Code may be used – These options define how often and in what ways the coupon code can function

- Multiple Program offerings (courses) in multiple baskets
- Multiple Program offerings (courses) in one basket
- Only one Program offering (course)

Code use by Communications – This field allows PSO to tie a coupon code discount to a marketing effort that is recorded in the Registration System. This feature will be outlined in later trainings

Coupon Code

Define a coupon code to require that students supply the code to obtain the discount:

Hide discount name on the public view

The student may use this code for:

- Multiple program offerings in multiple baskets
- Multiple program offerings within one basket
- Only one program offering

Code may only be used by students associated with the following communications:



Nothing found to display.

Setting up Discounts

Apply to Costing Units– Set your discount as being eligible to use in your costing unit.

Save.

You have now created a Discount that can be applied to different areas in Destiny

Remember, a Generic discount can be applied to more than just a registration. A 10% discount can be applied to Special Requests, Tuitions, Application fees, etc. You do not need to make a specialized discount for every single course that receives a discount if you plan your discounts at a PO or CU level



Available to be applied to the following costing units:*

J.W. Fanning Institute of Leadership Development - PO0004 > Institute of Leadership - Comr
J.W. Fanning Institute of Leadership Development - PO0004 > Institute of Leadership - Admi
J.W. Fanning Institute of Leadership Development - PO0004 > Institute of Leadership - Confl
J.W. Fanning Institute of Leadership Development - PO0004 > Institute of Leadership - Non-I

Nothing found to display.

Save Reset

Conclusion – Recommended next Steps for Course Section Creation

Recommended Topics Related to Discounts

- Review Course Section Fee Setup
- Review Tuition Profile Creation
- Review Special Request Creation
- Review Service Charge Creation

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