ActiveNet Fee Calculation

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# Summary of fees

In ActiveNet, there are many kinds of fees, some of which are charged to customer directly, while some others are charged to the organizations.

The following is a summary of the various fees in ActiveNet.

|  |  |  |  |
| --- | --- | --- | --- |
| **Fee Charged to** | **Type** | **Description** | **Hierarchical Structure** |
| Customers | Activity Fee | Fee for registering an activity, such as registering for football lessons | Create at the individual activity level |
| Facility booking Fee | Fees for booking a facility, equipment or a locker. | Using charge matrix structure |
| Daycare program Fee | Fee for enrolling into a daycare program. | Create at the individual daycare program level |
| Membership Fee | Fee for purchasing a membership package. | Create at the individual membership package level |
| POS Fee | Fee for purchasing a product. | Create at the individual product level |
| Penalty Fee | Fee for certain changes, such as withdrawal from activity, transfer to another activity, Non-sufficient-funds, Interest Charge, Late fee, etc… | Different penalty fees may use different configuration hierarchy.  See more details in the section |
| Gift Certificate | Fee for purchasing a gift certificate. |  |
| Payment plan surcharge | Fee for using a payment plan. |  |
| Usage Fee | Also called “booking privilege” fee.  Fee to charge prior to booking any activities. | Activity usage can only be created at the system level.  But for membership usage fee, it can be override at individual package level. |
| Organization  (Client of Active Network) | Transaction Fee | Fee for using ActiveNet system to handle staff side transaction. |  |
| Processing Fee (also called convenience fees) | Fee for using ActiveNet system to handle public transactions. |  |

# Activity Charge

Below are all the fee conditions/filters that can be used for activity charge.

|  |  |  |
| --- | --- | --- |
|  | **Conditions/filters** | |
| Common-used charge conditions/filters | Customer Type | |
| Resident/Non-resident | |
| Minor/Senior | |
| Member/Non-member | |
| Internet | |
| Customer Age | |
| Alternate Key | |
| Effective and Expiration date | |
| Activity-specific charge conditions/filters | Trial Class fee/discount | |
| Regional Pricing | |
| Instructor-based Fee | |
| Volume Pricing Plan | |
| Team registration | |
| Multi-type fee/discount | Multi-person |
| Multi-activity |
| Based on previous registration |

## Create and Maintain Activity Charge

**Location:** At individual activity level

You can set up variety of charges for an activity. There is no limit to the number of charges attached to an activity. During the transaction process, as long as the customer meets the charge conditions, the charge will be applied.

**Note:**

* To create an activity charge, you are required to select an existing charge template. The charge templates are useful if a large number of activities share the same fee structure. (Maintain Charge Templates: Location: Administration > Financial Settings > Charges)
* The charges maintained at the activity level are used for the activity only.
* User is able to modify the activity charge(s) at any time even though the charge(s) have been applied to registration transactions. Since the changes to the charge will only be applied to new transactions; it has no effect on the existing transactions.

## Override Permissions

In the charge configuration page, you can specify whether allowing user to change the fee amount at the time of sale.

There are three options:

* Always: Allow any system user to override the charge amount and qualification during transaction process.
* Never: Nobody can override the default charge amount and qualification during transaction process.
* Password: Only the system user who has the profile “Front Desk: Registration/Membership/Daycare – Override Fees” can override the charge amount and qualification during transaction process.

## Units

Unit refers to a way that fees are applied to transactions. For example, it is necessary to specify whether a fee is for one booking or for one hour.

Basically, in ActiveNet there are two types of activities.

* Group Class: All registrants take class together at the same time.
* Private Lesson: Every registrant is able to select different instructor, class date/time and duration.

For group class, organization charges a fixed fee to registrant. Because all students take exactly the same classes. So it’s no necessary to provide per hour or per lessons fee.

For private lesson, usually organization calculates fee according to the actual number of bookings the customer purchased or the actual hours they booked. Because each student may purchase different number of lessons, have different course duration, etc…

### Each

**This charge unit can be used for both group class and private lesson.**

Here the “Each” may stand for “Each transaction” or “Each Seat” (It depends on if the activity allows for quantity-based enrollment.)

* If the activity doesn’t allow for quantity-based enrollment, “Each” stands for “Each Transaction”.
  + For example: Activity fee: $85. It means for a registrant no matter how many bookings purchased or hours booked, system will only charge $85 to the customer.
* If the activity allows for quantity-based enrollment, “Each” stands for “Each Seat”.
  + For example: Activity fee: $85. It means that if the registrant only purchase one seat, the total charge is $85. If the registrant purchases more than one seat (X seats), the total charge is (X\*$85).

### Per booking fee

**This unit is only used for private lesson.**

Here the “Per Booking” refers to “Per Lesson”.

For private lesson, system requires customers to specify a number of booking (i.e. The number of lessons they purchased). You can set up a fee rate per lesson:

**For example:**

|  |  |
| --- | --- |
| **Booking** | **Rate** |
| **Number of booking: 5**  **Customer pays:** | **$15 Per booking**  **5 \* $15 per booking = $75**  **$75** |

### Per booking per hour fee

This unit is only used for private lesson.

The fee unit is based on the duration of booking. Except for per hour rate, you can also set up fee rates per X minutes.

**Note:** If the registrant doesn’t specify the duration for each class which means system cannot calculate the exact hours booked. In this case, system will use the pre-defined maximum duration to calculate the per hour fee.

**For example:**

|  |  |
| --- | --- |
| **Booking** | **Rate** |
| **Number of booking: 5**  **Duration of each lesson: 30 mins**  **Total duration of lessons:**  **Customer pays:** | **$15 every 30 minutes**  **30mins \* 5 = 150 mins**  **$15 \* (150/30) = $75** |

|  |  |
| --- | --- |
| **Booking** | **Rate** |
| **Number of booking: 5**  **Duration of each lesson: 30 mins**  **Total duration of lessons:**  **Customer pays:** | **$25 every 60 minutes**  **30mins \* 5 = 150 mins**  **$25 \* (150/60)= $62.5** |

## Common Used Charge Conditions/Filters

Although the charges for different services and products have different rules, they still have a lot in common.

The following are the fee conditions/filters that are available in activity, daycare program, membership package and facility booking modules.

* Customer Type
* Resident/Non-resident
* Minor/Senior
* Member/Non-member
* Internet fee/discount
* Age-based fee/discount
* Alternate key
* Effective and expiration date

### Customer Type

Customer Type is a configurable parameter in ActiveNet. The organization is able to configure any customer type according to their needs. Then assign a customer type to customer or company.

**Here is the location to maintain customer type in system:**

* Administration > Population Settings > Customer Types

**Here is the location to assign a customer type to customer:**

* Front Desk > Population > Customers > Search customer > Customer Account Functions > Change Details – Personal Information Section
* Administration > Population Settings > Customers > Search customer > Customer Account Functions > Change Details– Personal Information Section

The customer type based fee/discount allows organization to charge different fee rate to the clients according to their customer type.

**For example:**

Maintain four customer types in system

1. Individual
2. Non-profit organization
3. Government
4. Commercial Company

Set up facility booking fees based on different customer type:

|  |  |
| --- | --- |
| **Facility Booking Fee** | **Rate** |
| Fee for individual | $100 |
| Fee for non-profit organization | $50 |
| Fee for commercial company | $120 |

During transaction process:

|  |  |
| --- | --- |
| A customer with the “Individual” customer type reserves the facility | Price: $100 |
| A company with the “Non-profit organization” customer type reserves the facility | Price: $50 |
| A company with the “Commercial company” customer type reserves the facility | Price: $120 |

### Resident/Non-Resident

In ActiveNet, a customer can be flagged as either “Resident” or “Non-resident”.

**Here is the location to flag “Resident” or “Non-resident”:**

* Front Desk > Population > Customers > Search customer > Customer Account Functions > Change Address – Residential Address Section
* Administration > Population Settings > Customers > Search customer > Customer Account Functions > Change Address – Residential Address Section

The resident/non-resident fee allows system user to configure different fee rate for local resident and non-resident.

**For example:**

|  |  |
| --- | --- |
| **Activity Fee** | **Rate** |
| Resident: | $40 |
| Non-resident | $50 |

|  |  |
| --- | --- |
| When Mary who is a resident registers into the activity | Price: $40 |
| When Bob who is NOT a resident registers into the same activity | Price: $50 |

### Minor/Senior

In ActiveNet, you can configure a specific age to define minor and senior citizens.

* A minor is someone who has not yet reached the aged of **X**.
* A senior is someone who has reached the age **Y** and older.

**Here is the location to configure Minor and Senior Age:**

* Administration > System Settings > Configuration – General

The minor/senior fee allows organization to grant discount for minor or senior citizens. (Or apply different fee rate for senior and minor citizens.)

**Note:** In the sale process, system calculates the customer age based on the activity start date rather than the sale date.

**For example:**

Configure Senior and Minor Age in system:

* Minor Age: <16
* Senior Age: >=60

Set up charges for activity:

|  |  |
| --- | --- |
| **Activity Charge** | **Rate** |
| Activity Fee | $100 |
| Senior discount | 20% |
| Minor discount | 15% |

Registration Date is Jul 1, 2013. The activity first date is Aug 1, 2013. (Note: Activity First Date is the first date defined in the default activity dates pattern. It may be different from the activity 1st meeting date.)

|  |  |
| --- | --- |
| Carol is less than 16 years old as of Aug 1, 2013 | Fee: $100  Minor discount: 15%  Total: $85 |
| Mary’s age is 15 years + 11month as of Jul 1, 2013  (That is, she is 16 years old as of Aug 1, 2013) | Fee: $100  Total: $100 |
| Jane is greater than 16 years old and less than 60 years old as of Aug 1, 2013 | Fee: $100  Total: $100 |
| Jason’s age is 59 years+11month as of Jul 1, 2013.  (That is, he is 60 years old as of Aug 1, 2013) | Fee: $100  Senior Discount: 20%  Total: $80 |
| Bob is greater than 60 years old as of Aug 1, 2013 | Fee: $100  Senior Discount: 20%  Total: $80 |

### Member/Non-Member

System determines member and non-member based on the type of membership hold by the customer.

How to identify member and non-member

* Pre-condition: Make sure the membership module is turned on
* At membership package level, there is an option called “Qualifies for if member fees?”. If this checkbox is checked, then the customers who purchased this membership will be qualified for If member fee. (ActiveNet also provides the functionality that allows you to specify particular membership package to qualify for the fee.) If unchecked, the customer who purchased the membership package will not qualify for the member fee.(Location: Administration > Membership settings > Packages > Select package > Change details)

The member/non-member fee allows organization to charge different amounts based on membership. (Or give a discount for their members.)

**For Example:**

Yearly membership is configured to “Qualifies for if member fees”.

Set up member and non-member fee for activity

|  |  |
| --- | --- |
| **Activity Fee** | **Rate** |
| Member fee | $80 |
| Non-member fee | $100 |

During transaction process:

|  |  |
| --- | --- |
| Mary had **never** purchased the Yearly membership package before. | Price: $100 |
| Bob has purchased the Yearly membership package.  (No matter the package status is active or expired, suspended, as long as the customer has bought the membership, they are qualified for the fee.) | Price:$80 |

### Internet

Internet fee is the fee that only applies to the customers who make online transaction. (CUI)

**For example:**

**Set up activity charge**

|  |  |
| --- | --- |
| **Activity Fee** | **Rate** |
| Tuition fee | $100 |
| Internet discount | 5% |

**During transaction process:**

|  |  |
| --- | --- |
| Registering the activity at front desk (through AUI) | Price: $100 |
| Registering the same activity online (through CUI) | Tuition Fee: $100  Internet discount: 5%  Prince: $95 |

### Age-based

The age-based charge allows organization to charge different amount according to the registrant’s age.

**Minimum Age: X**. It means that only the customers who are equal or greater than X years are qualified for the fee.

**Maximum Age: Y**. It means that only customers who are equal or less than Y years are qualified for the fee.

**For Example:**

**Set up activity charge as follow:**

|  |  |
| --- | --- |
| **Activity Charge** | **Fee Rate** |
| Minimum age: 0  Maximum age: 15 | $90 |
| Minimum age: 16  Maximum age: 59 | $120 |
| Minimum age: 60  Maximum age: 0 | $100 |

**During transaction process:**

|  |  |
| --- | --- |
| If the registrant aged 15 or under | Price: $90 |
| If the registrant aged 60 or over | Price: $100 |
| If the registrant aged 16 to 59 | Price: $120 |

### Alternate Key

Alternate Key Types are the unique identifiers for customers in a third-party system. (For example: student ID, a tax system ID, etc) System users are able to manually assign, modify and remove alternate keys from customers. Alternate keys may also be updated by the customer import process.

Basic rule of alternate key application in ActiveNet:

* A customer may have one or more alternate key type. For example: a student ID, a tax system ID.
* An alternate key type may have one or more alternate key statuses. For example: a student ID alternate key may have statuses such as part-time, full-time and alumni.
* Different alternate key type may have same alternate key status. For example: a student ID and an employee ID alternate key may have the same statues, such as part-time, full-time.

Alternate key based fee/discount allows organization to set up different fees/discounts based on the customer’s alternate key type and status attached.

For example:

You can set up activity charges as follow:

|  |  |  |
| --- | --- | --- |
| Alternate Key Type | Alternate Key Status | Fee Rate |
| Student ID | Full-time | $100 |
| Part-time | $125 |
| Alumni | $150 |

Then system will apply corresponding price to the customer whose alternate key match both the TYPE and Status.

### Effective and Expiration Date

The effective date is the date that the system starts to apply the fee/discount,

The expiration date is the date that the system will stop applying the fee/discount after this date.

The effective and expiration dates define the period that a charge is applicable.

For example, if you want a fee to be applicable from Aug 1 to Sep 30, then the effective date would be Aug 1 and the expiration date would be Sep 30.

## Activity-Specific Charge Conditions/Filters

### Trial Class

While registering into an activity, customer can select to officially enroll in the activity or just take a trial class prior to registration.

The trial class fee/discount can only be applied to the trial class enrollment.

**For example:**

|  |  |
| --- | --- |
| **Fee** | **Fee Rate** |
| Official Registration Fee | $150 |
| Trial Class Fee | $15 |

**During Transaction Process:**

|  |  |
| --- | --- |
| If the customer enrolls into the activity | Price: $150 |
| If the customer selects to enroll into a trial class | Price: $15 |

### Regional Pricing

**Pre-requisite:** The system setting “Allow international addresses?” should be checked.

You can create and assign different activity fee rate based on different state and country.

Note that a region is comprised of a combination of one country and one provinces and/or states.

**For example:**

Set up regional pricing

|  |  |
| --- | --- |
| Region | Fee Rate |
| Standard charge | $100 |
| US – CA state | $95 |
| US – AZ state | $90 |

During transaction process:

|  |  |
| --- | --- |
| If the registrant’s residential address is US, CA | Price: $95 |
| If the registrant’s residential address is US, AZ | Price: $90 |
| If the registrant’s residential address doesn’t belong to the above two states | Price:$100 |

### Instructor

This condition is only used for private lesson. You can setup different fee rate for different instructors. For example: If the participant books a senior instructor, the fee rate is $80 per booking. If the participant books a junior instructor, the fee rate is $60 per booking.

ActiveNet supports choosing a specific instructor or specifying instructor role.

For example:

**Set up activity fees as follow:**

|  |  |
| --- | --- |
| **Fee** | **Fee Rate** |
| Senior instructor | $80 |
| Intermediate instructor | $70 |
| Junior instructor | $60 |

**During transaction process:**

|  |  |
| --- | --- |
| Bob purchased total 10 private lessons that taught by 3 different instructors.  2 lessons are taught by a junior instructor.  3 lessons are taught by an intermediate instructor.  5 lessons are taught by a senior instructor.  Customer pays: | $60 \* 2 + $70 \*3 + $80 \*5= $730. |

### Volume Pricing Plan

Volume pricing plan is used to set up different fee rate based on the number of lessons the registrant chooses to register for: More lessons result in a lower fee rate.

**For example:**

|  |  |
| --- | --- |
| Range | Fee Rate |
| Range 1-5 | $10 per booking |
| Range: 6-10 | $8 per booking |
| Range: >=11 | $6 per booking |

**During transaction process:**

|  |  |
| --- | --- |
| If Mary books 5 lessons, | $10 per booking  5 Lessons \* $10  Total: $50 |
| If Mary books 7 lessons, | $8 per booking  7 lessons \* $8  Total: $56 |
| If Mary books 11 lessons | $6 per booking  11 lessons \* $6  Total: $66 |

### Multi-Person (Also called “Sibling discount”)

Conditions: Different customers enroll into the same activity.

Scenario: If the registrant’s brother or sister is studying at the school, the registrant can get a discount on the activity fee.

Multi-person discount is applicable no matter when they enrolled in same receipt or on separate receipts.

Example:

The organization offers a multi-person discount for their activities. If they enroll 2 or more different customers in the same activity, then the second and subsequent registrant qualifies for the discount.

|  |  |
| --- | --- |
| Activity Fee | Fee Rate |
| Registration Fee | $100 |
| Minimum: 2  Maximum: 2 | 10% |
| Minimum: 3  Maximum: 3 | 15% |
| Minimum: 4  Maximum: 12 | 20% |

|  |  |
| --- | --- |
| The 1st enrollee needs to pay | $100 |
| The 2nd enrollee needs to pay | $100 – ($100\*10%) = $90 |
| The 3rd enrollee needs to pay | $100 – ($100\*15%) =$85 |
| The 4th and 12th enrollees needs to pay | $100 – ($100\*20%) = $80 |

### Multi-Activity

This discount/fee will be applicable when the same customer enrolls into different activities. System will counts the activities, if the number qualifies for multi-activity discount, apply the discount.

Configuration settings:

* Minimum Activities: The minimum number of activities that must be enrolled in on one receipt to be eligible for the discount.
* Maximum Activities: The maximum number of activities that can be enrolled in on one receipt to be eligible for the discount.

For example:

|  |  |  |
| --- | --- | --- |
| Charge | Multi-activity configuration | Rate |
| Registration Fee |  | $100 |
| Multi-activity discount A: | Minimum activities: 2  Maximum activities: 2 | 10% |
| Multi-activity discount B: | Minimum activities: 3  Maximum activities: 3 | 15% |

|  |  |
| --- | --- |
| If the registrant enrolls into the activity at the 2nd order | $100 - ($100 \* 10%) = $90 |
| If the registrant enrolls into the activity at the 3rd order | $100 – ($100\*15%) = $85 |

### Team Registration

Run tests in system, but the result is not clear.

### Based on Previous Registration

Only the customers who have already registered into the selected activities are eligible for the charge.

For example:

Set up Charges for Activity A

|  |  |
| --- | --- |
| Charges | Rate |
| Registration Fee | $100 |
| Based on Previous registration discount  Condition: the customer should already enrolled into Activity B | 10% |

|  |  |
| --- | --- |
| Amy has already enrolled into Activity B. If she enrolls into Activity A later | Registration Fee: $100  Discount 10%  Price: $90 |
| Amy has never registered in Activity B. If she enrolls into Activity A | Registration Fee: $100  Price: $100 |

## Other Factors may Impact Activity Fee Calculation

### Prorate during enrollment

ActiveNet provides the ability to prorate fee based on the number of missing meeting dates. Because students may enroll at any time during the school year.

For example:

Activity Fee is $100.

The total number of meeting dates: 5 meeting dates. ($20 per meeting date)

If the registrant comes to enroll after missing two classes, the system will only charge $60 ($20\*3) to the registrant. Since the student only attends the remaining 3 meeting dates

### Discount Order

The discount order determines the discount will be applied in which order.

For example:

Activity fee is $100.

If set discount order:

Discount A: 10% (order 1)

Discount B: 5% (order 2)

Final charge = $100 – (100 \* 10%) – (100 – 100 \*10%) \* 5% = $85.5

## Modify the Original Charges

### Modify Activity Charges

Modifying activity charges will result in changes for all new transaction immediately after saving. However no existing transactions will be affected.

If you want to apply the modified activity charges to existing transaction, you can perform the “Modify Enrollment” process, where system will display all the applicable charges, then you can adjust the original charges.

# Membership Charge

## Create and Maintain Membership Charge

**Location:** At individual membership package level

You can set up variety of charges for a membership package. There is no limit to the number of charges attached to a membership. During the transaction process, as long as the customer meets the charge conditions, the charge will be applied.

**Note:**

* To create a membership charge, you are required to select an existing charge template. The charge templates are useful if a large number of memberships share the same fee structure. (Maintain Charge Templates: Location: Administration > Financial Settings > Charges)
* The charges maintained at the membership package level are used for the membership only.
* User is able to modify the membership charge(s) at any time even though the charge(s) have been applied to transactions. Since the changes to the charge will only be applied to new transactions; it has no effect on the existing transactions.
* **Note: the modified charges will apply to renew process, no matter which renew approach is used (front desk, online or auto-renewal)**

## Override Permissions

Please Refer to [Activity Charge Override Permissions](#OLE_LINK2)

## Units

### Each

Here the “Each” may stand for “Each membership package”. It’s a fixed fee rate that is charged without considering the number of persons and the number of visits included in the membership package.

### Per Pass

In ActiveNet, system allows user to purchase more than one passes at one time. In this case, the full cost of membership is dependent on the number of passes the customer purchases.

For example:

|  |  |
| --- | --- |
| A day pass is valid for the entire day. Fee rate is $10 per pass  Bob buys 2 day passes for him and his friend.  Customer pays: | $100 x 2 = $200 |

### Per Use (per person, per visit)

This charge unit is commonly used for punch pass. So that the customer will be charged on a per visit basis.

For example:

|  |  |
| --- | --- |
| Bob purchases a 20 visit punch pass.  Fee rate: $6 per use (per visit)  Customer pays: | $6 x 20 = $120 |

## Common Used Charge Conditions/Filters

Please refer to the same [section](#OLE_LINK20) of activity charge

## Membership-Specific Charge Conditions/Filters

### Renewal Fee/discount

Business need: Sometimes, the organization offers a discount on renewal. So you can set particular fee or discount that only charged for the membership renewal.

There are three methods to renew your membership:

* Renew online
* Renew at front desk
* Set up Auto-renew

The renewal fee/discount can only be applied to the membership renew process.

|  |  |
| --- | --- |
| If a customer renews their membership, they will receive a 5% renewal discount.  Customer Pays: | 10 x $6 per use = $60  Discount: 60 x 5% = $3  $60 - $3 = $57 |

### Time periods based Discount

**This charge condition can only be applied to discount no available for fee.**

The time period based discount allows organization to charge different amount according to the number of periods the customer purchased.

Note: To apply time-period discount, the membership package valid period should be either “Days after issue” or “Time Period” type.

For example:

The organization offers discount that will be applied if 3 months or more of a monthly pass is purchased.

If left blank, the discount is applied regardless of the number of time period purchased.

For example:  
A customer purchases a Monthly pass

|  |  |
| --- | --- |
| Membership Charge | Rate |
| Basic membership fee | $100 |
| Time period based discount  (Apply to purchases 2 time period or more) | ($10) |

|  |  |
| --- | --- |
| Conditions | Price |
| If the customer purchase only 1 time period | $100 |
| If the customer purchases 2 time periods | $100 - $10 = $90 |

### Min and Max Passes Fee/Discount

System will counts the number of passes purchased by customer, if the number qualifies for multi-passes discount, apply the discount.

Configuration settings:

* Minimum passes: The minimum number of passes that must be purchased to be eligible for the discount.
* Maximum passes: The maximum number of passes that can be purchased to be eligible for the discount.

|  |  |  |
| --- | --- | --- |
| Charge | Multi-passes configuration | Rate |
| Per Pass Fee |  | $100 per pass |
| discount A: | Minimum passes: 2  Maximum passes: 3 | 10% |
| discount B: | Minimum passes: 4  Maximum passes: 5 | 15% |

|  |  |
| --- | --- |
| If the customer purchases only 1 pass, | $100 |
| If the customer purchases 2 passes,  Customer pays | 2\* $100 = $200  10%  $200 – ($200 x 10%) = $180 |
| If the customer purchases 5 passes,  Customer pays | 5 x $100 = $500  15%  $500 – ($500 X 15%) = $425 |

### Min and Max Uses Fee

**This charge condition can only be applied to fee no available for discount.**

Applicable to punch type passes.

System will counts the number of passes purchased by customer, if the number qualifies for multi-passes discount, apply the discount.

Configuration settings:

* Minimum uses: The minimum number of uses that must be purchased to be eligible for the fee.
* Maximum uses: The maximum number of uses that can be purchased to be eligible for the fee.

**Note**: This charge condition/filter is only available if the **Per Use Fee** option is selected.

|  |  |  |
| --- | --- | --- |
| Charge | Multi-passes configuration | Rate |
| 1-10 uses: $6 per use | Minimum uses: 1  Maximum uses: 10 | $6 per use |
| |  |  | | --- | --- | | 11-20 uses: $5 per use |  | | Minimum uses: 11  Maximum uses: 20 | $5 per use |
| |  |  | | --- | --- | | 21-30 uses: $4 per use |  | | Minimum uses: 21  Maximum uses: 30 | $4 per use |

|  |  |
| --- | --- |
| If the customer purchases 10 uses, | 10 x $6 = $60 |
| If the customer purchases 11 uses, | 11 x $5 = $55 |
| If the customer purchases 25 uses, | 25 x $4 = $100 |

### Suspended fee

Business needs: Allow user to specify an amount to charge per renewal cycle that the membership is suspended.

For example: if a membership that is typically $50 per month is suspended for 3 months, the fee is $5 per month for those 3 months.

## Other Factors may Impact Membership Fee Calculation

### Pro-rate during Enrollments As Of a Specific Date

Unlike activity fee pro-rate, if an activity fee is set up to allow pro-ration, pro-ration is either turned on or turned off. There is no way to set up a specific effective date for turning on pro-ration.

If the existing 'Pro-rate during enrollment/sale' flag is turned on, allow the user to configure the specific effective date to begin allowing pro-ration during sales. Prior to the effective date, pro-ration is turned off and after which, pro-ration is turned on.

Business needs: Memberships- being able to prorate memberships starting on a specific date. Some organizations don't start prorating their membership fees until the membership is 3/4 of the over.

### Discount Order

Please refer to the same [section](#OLE_LINK16) in Activity Charge.

## Modify the Original Charge

Unlike activity, there is no way to modify membership sale after the transaction finished. The user can only cancel the transaction and purchase the membership again to apply the new charges.

# Global Discount

Global Discount can only be applied to the following services:

* Activities
* Daycare Programs
* Memberships

Here is a comparison table that shows the differences between the product-specific discount and global discount

|  |  |  |
| --- | --- | --- |
|  | **Product/Inventory Specific Discount** | **Global Discount** |
| Configuration | At individual product level | At system Level |
| Scope | Only apply to a specific product | Can be applied to a large number of products that across different modules. |
| Assignment Method | Cannot be assigned to other products. | Provide flexible ways to assign a discount to a large number of products. |
| Discount Qualifying Conditions | According to different module, provide corresponding filters/conditions. | Only provides the common used charge conditions/filters. And only a few activity/program-specific charge conditions.  Normally, we add new qualifying conditions when the clients request to add a specific condition to global discount. |

# Coupon

Coupon can be only applied to the following transactions: (include both staff and public sides)

* Activity registration
* Daycare Program enrollment
* Membership Sale

## What’s the difference between a coupon and a discount

Coupons are configured with a coupon code. Coupon codes are manually entered by customer during the transaction process in order to receive the discount.

Discounts are typically configured to apply automatically to a product. No action is required by customer in order to receive a discount other than placing an order that qualifies for that discount.

## Coupon Type

1. Activity Registration
2. Merchandise
3. Free Merchandise
4. Marketing
5. Daycare
6. Membership

## Setting Up A Coupon

* Create a single coupon (Refer to <http://sbs.active.com/docs/DOC-264157>)
* Generate a batch of coupons (Refer to <http://sbs.active.com/docs/DOC-264157>)

## Other Coupon Settings

Location: Administration > Financial Settings > Configuration

Show Valid Customer Coupons During

* Staff enrollment
* Public enrollment

## Hierarchy Structure

* Attach a system coupon to an activity/merchandise/daycare/membership.
* User is able to override the system coupon at the individual product level.

## View Customer Coupon

There are two ways to view customer coupon:

1. Front Desk > Customer Account Functions
2. Access to the customer’s online account

## Apply Coupon During Transaction

The customer needs to enter the coupon code into the “Enter coupon code” field on the “Enrollment Fees” section to apply it to this transaction. This will discount the whole transaction by a fixed or percentage discount.

Each customer can only apply this coupon once in the same transaction.

Customer can apply multiple different coupons to the transaction at the same time. (If any)

# Modify Activity Enrollment

### What content can be modified

**Modify the original transaction amount**

* Increase/decrease fee amount
* Increase/decrease discount value
* Apply new charge
* Exclude existing charge

**Coupon**

* Apply new coupon
* Cancel existing coupon

**Other information**

* Staff notes
* Customer notes
* Customer questions
* Checklist

**Payment Plan**

**Pre-condition:** The original transaction should have payment plan attached! If not, there is no way to modify payment plan or apply new payment plan during modify enrollment process.

* Controlled by a system setting “Recreate payment schedules when modify enrollment?”

If the setting “Recreate payment schedules when modify enrollment?” is checked,

|  |  |  |
| --- | --- | --- |
| Recreate payment schedules when modify enrollment? | Yes | |
|  | On the fly payment plan | Create a new payment plan that all amount due on the day after today. |
|  | Activity payment plan | If this option is selected when you modify an enrollment, ACTIVE Net will recalculate any payment plan amounts based on the *current* configuration (found at Administration > Registration Settings > Activities > Change Payment Plans) of the payment plan that you specified during the original enrollment.  If there has been a change in the payment plan’s configuration since the original enrollment, ACTIVE Net will use the new configuration in recalculating payment plan amounts. |
| Recreate payment schedules when modify enrollment? | No | |
|  | On the fly payment plan | The balance will be evenly distributed to each due date. |
|  | Activity payment plan | The balance will be evenly distributed to each due date. |

For example:

If the setting “Recreate payment schedules when modify enrollment?” is unchecked,

Amount increased: System will automatically evenly divide the increased amount based on the number of due date.

|  |  |
| --- | --- |
| Oct 1, 2013 | $45 |
| Nov 1, 2013 | $36 |

After modifying enrollment, system will evenly distribute the increased $5 to each due date:

|  |  |
| --- | --- |
| Oct 1, 2013 | $47.5 |
| Nov 1, 2013 | $38.5 |

# Usage Fee

## Business Need

**There are two types of usage fees:**

**Activity Usage Fee** will always be applied during the initial registration of a student/family for the upcoming academic year. Here are the special points of activity usage fee:

1. The fees will be charged only once in a particular time period or a season.
2. The fees are either at the family or individual level.
3. The fee can be waived/discounted for early registration
4. Different activities may have different usage fee rates.

In brief, the activity usage fee is the fee that the customer has to pay before booking any activities in an academic year.

**Membership Usage Fee**: In Class, there's one fee called Membership Joining Fee which is extra charges for services or equipment rentals that may be added to a membership at the time of sale, such as locker charge.

1. The fee is charged only once when the first membership is sold.
2. The fees may apply to either a family or to individual,
3. The fee can be discounted
4. A member who has previously paid a usage fee but upgrades to a package which requires a higher usage fee may be required to pay the difference.

## Create and Maintain Usage Fee

Location: Administration > Financial Settings > Usage Fee

Adding or Modifying a Usage Fee (Refer to <http://sbs.active.com/docs/DOC-264234>)

## General Configureation Settings

**Activity Usage Fee:**

Location: Administration > Registration Settings > Configuration > General Settings

The option “Enable Usage Fee?” is used to 'turn-on' that Usage Fees functionality.

* If the 'Enable Usage Fees' option is enabled then any usage fee associated with an activity will be charged as appropriate during enrollment.
* If the option is not enabled then no usage fees will be charged during enrollment, regardless of whether a usage fee is associated with the activity or not.

**Membership Package Usage Fee:**

Location: Administration > Membership Settings > Configuration

The option “Enable Usage Fee?” is used to turn-on membership package usage fee.

## Attach Usage Fee to Activity/Package

Note:

* At activity level, system user cannot override activity usage fee.
* At package level, system user is able to override the package usage fee.