# Class *– Help Document*

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##### Price Lists

How do I add a new item to the Price List?

Select: Maintenance/Settings > Maintenance.



#### Price List Name

The MASTER PRICE list is the “Gross Price.”

#### Price Items

A Master Price List item is required for every element in the price list.

Every item will have a “From” date, which indicates the price start date.

E.g. 01/Jan/14 (Winter prices)

The price item remains valid up to the “From” date of the next start date e.g. 29/Jun/14 (Summer prices)

Values entered are used for Direct Student invoicing and the basis for

Discount/Commission.

E.g. an Agent receiving 10% discount/commission will have it applied to the MASTER Price List item.



**School Name** Select school

**Code** Mandatory

**Name** Up to50 Characters (prints on the invoice)

**Lessons (per wk)** Enter number of lessons (if applicable)

**Units** Date based (system will use dates to calculate the price)

e.g weekly/daily rates.

 Leave blank if prices are unit based, eg transfers, exam fees.

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#### Calculate Duration as Nights? (Accommodation)

If “nights” (default) then Sunday to Saturday = 6 nights (student does not stay Saturday night)

If “days”, then Sunday to Saturday = 7 days (a week is charged/paid).

Large units (No. Days/Units) - Examples:

Tuition typically 5 day week

Accommodation typically 7 day week

Items sold in units (Transfers/one to one lessons/Exam fees/enrolment fees) =1

Use of “Unit” prices for Tuition items.

Avoid Unit prices (except for “individual lesson” prices).

**Example 1**

Course 10, 11 or 12 weeks long, but same price applies for any number of weeks, up to 12 i.e. a minimum price of 12 weeks applies.

Eg £1500 for up to 12 weeks, thereafter an extra £100 per week.

Price set all units, from 1 to 12 = £1500

 Additional Large Unit charge = £100

**Example 2**

A Mon-Fri course sold in 4 week blocks only (£400 per 4 weeks)

Large unit:

1 = £400

2 = £400

3 = £400

4 = £400

5 = £800

6 = £800

7 = £800

8 = £800

*Part units -* If the Large unit is date based the Part unit means “Days” (if set).

**For Information**: All prices can be manually overridden when the invoice is calculated.

#### Course Defaults - Select the course(s) relating to the Price Item.

#### Mand (Mandatory) - Tick this box, this will allow the course(s) to be automatically set when the price item is selected, during enrolment entry.

If the course has not yet been created then click on the “Create New Course” button.

**Cost Centre/Department/Nominal Codes**.

Enter codes if accounting analysis is required.

On Accommodation the system will force the entry of Nominal ledger codes for Sales and Payment accounts, to ensure valid codes are set, even if not used.

**Language Names**

Enables the invoice be produced with the price item name printed in the relevant language.



#### Prices



Enter the weekly value in the Calculator and use the ‘Tab’ button on the keyboard to automatically calculate the weekly rates from week 1 to week 53.

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#### From Date Commencing date of the price.

####  Ensure the date represents a normal starting day for the item e.g. Course = Monday whilst Accommodation = Saturday.

####  Having prices starting mid week may create undesirable price breaks.

#### Currency A price is required for each currency.

#### Allow Discount Select if Discount is allowed

#### Allow Commission Select if Commission is allowed

**Calculator** Ifthe weekly price changes after a certain number of weeks studied, enter the prices breaks for the required weeks.

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#### Part Units

Used for charging or paying “Days” for Courses or Accommodation.

Prices should be entered for each of the days.

Courses - 4 part unit days

Accommodation - 6 part unit days

These values can be manually amended.

Transfer Records

Chargeable Days = 1 (one off payment)



**Note**: Default values should be set for the “Booking Defaults”.

**Prices**



**Sundry Records**

Enrolment Fee - one off payment so Chargeable Days = 1

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Enter the price in week one. Click the ‘Tab’ button on keyboard.

Select YES to set all week prices to the same value.

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#### Price Item Notes



**Linked Items**

If whenever using a particular price item within an enrolment another item should automatically be included e.g. a student booking the Cambridge Course should also be charged for the Exam Fee, set up Linked Price item.



#### Web

If an interface with your web page is in use then the “Web” tab should be completed.

Contact the Support Desk for more detailed information.

