Adding Voucher processing into Annapurna.

**Introduction.**

This document describes how voucher codes can be added into Annapurna.

Configuring.

Vouchers are turned on by the Setting in Pricing / Vouchers Configured.

This defines how voucher codes are managed. In Order Entry, there is a box where the voucher code can be entered. The voucher must exist in the table for pricing rules to be applied. External vouchers from lens suppliers do not have this restriction, in this case the voucher code will be retained on the order for forwarding to the supplier.

This can also be set via CSV import.

The product code can be specific product codes or Design or Colour codes.

If it is a product code then the Alternative Product code can be set to indicate to be priced as the alternative. An example could be for upgrading AR coat by charging the price for a cheaper coat.

**Implementation.**

When a voucher code is entered a check is made to see if the voucher exists in the voucher table. If it does then the voucher action is read. This can be one of the following.

Second pair reduced price

Special Discount

Product Upgrade

**Second Pair reduced price.**

The discount in the offer % is applied to the second pair.

A check is made to see that two orders have not been allocated to the order. If there is not a first order saved on the voucher and if there is a list of applicable products for first order then the products are checked. If there is a matching product then this is deemed to be the first order. If there are no products set on the voucher then this is deemed to be the first order.

If the order is not the first order and there is not a second order saved then the list of products allowed on the second order are checked. If there is a match or there are no products specified then this is deemed to be the second order.

If the order is not set to be the first or second order then a warning is given.

If the order is the first order then the value and order number of the order is recorded in the voucher for the first order.

If the order is the second order then the value and order number of the order is recorded in the voucher for the second order.

Whether the first order or the second order is added before the other then the earliest flag is set.

When the order is added (either first or second) and it is not the earliest then extra pricing checks are added.

If the price of the later order is less than the price of the earlier order then the offer % is applied.

If the price of the later order is more than the price of the earlier order then the offer % is applied to the price of the earlier order and added as a price line on the later order.

In either the case, the pricing information on the order / delivery note will reference the earlier order number.

**Special Discount.**

The products entered on the order are checked against the products assigned in the Applicable Products table or there are no products. If there is a match then the offer discount / value is applied. If a pricelist(s) is specified in the voucher information then the pricing is taken from this pricelist(s) rather than customer pricelists.

Offer values could potentially be used as non-tol voucher values, there will need to be way of recording a voucher and value into the system when recording a non-tol.

**Product Upgrade**

The products on the order are checked against the products assigned in the Applicable Products table. If there is a match then the pricing is calculated as per the alternative product. If there are pricelist set in the voucher then these pricelists specified in the voucher data will be used for pricing.

Voucher pricing will be shown as a separate line on the pricing information so that the lens product sales and vouchers given can be analysed.

There will be a voucher trail report to show the vouchers applied which can be saved to Excel.

**Other factors.**

When order is cancelled and there are voucher prices recorded then attention will be drawn for customer services to review the pricing. This will indicate the second order. The assigned order number will be released in the voucher table allowing the voucher to be used again.

On amend order, if voucher is withdrawn then the relevant entries for the order in the voucher file need to be cleared.

If the first or second order pricing is amended then attention needs to be drawn to customer services to indicate that there is a connected order.

Credits will simply credit the price on the order. The voucher table will be updated to indicate that the order was returned and release the voucher for application again. Returned orders will not have action taken as these are not “cancellations” to release the voucher.

**Setting Up Vouchers.**

Under commercial there is a new button, Vouchers. Clicking this brings up the voucher management screen.

This will show the vouchers that have been defined. Each row has the following

*Voucher code*  the code for the Voucher

*Voucher Action*  this is a code to indicate Action type

1 - Second pair reduced price

2 - Special Discount

3 - Product Upgrade, the order is priced as the alternative (cheaper) product

*Lens Supplier*  used only if products from a particular supplier are applicable.

*First Applicable products indicator\**  this is a code to identify the products applicable for the first product on the voucher. Please note that this is not the code of the product but a code to indicate the applicable group. The products in the applicable group are defined in the Products tab.

*Second Applicable products indicator\** this is the same as first applicable but is used to define the upgrade.

*Offer %* the discount % given if applicable.

*Offer value*  the value of the voucher.

*Pricelist to use* if pricing is to be taken from a pricelist then the pricelist to use.

*Start date* When the voucher code is applicable.

*End date*  When the voucher code ends.

There are additional fields but these are assigned as the voucher is used.

*Allocated Account*

*Assigned Order 1*

*Assigned Order 2*

*Value Order 1 before voucher*

*Value Order 2 before voucher*

*Voucher Value*

*Earlier Order (either 1 or 2 to indicate which was added earliest).*

*Credit flag 1 (to indicate the order was credited)*

*Credit flag 2*

There are options to export / import to CSV.

**Reusing a Voucher.**

If the first applicable product group code starts with a \* then this indicates that it is a repeatable voucher. In this case, when the voucher is used, it is not assigned to a particular order but can be reused. This is for when multiple pairs are given for the same patient.

It will be possible to set entries in the table via a CSV import / export on this screen.

**Products.**

This defines the products in the applicable product groups. The product group code can be entered on multiple rows.



Here FREEPV is defined to include lenses with Designs Anti-Fatigue and Drive SV.

The Altcode defines the Alternative code to be used if an upgrade is being used. This defines the product to be charged for.