

Vouchers Functional Specification

Why?

The pain of submitting an expense report can deter employees from frequently attending association events. Their employer is happy to reimburse the attendance fees but associations may offer shorter, more frequent events and it can be a lot of paperwork for an employee to seek reimbursement for a \$20-\$40 class or event every few weeks.

This feature adds the ability for an association to sell a pack of event tickets to events with a specific category. This is perfect for associations with active sub-groups like Young Professionals or Women in Business. Attendees can buy a pack of tickets to attend these events and only need to submit one expense report to their employer. When they go to register for the event their ticket is free and they just need to enter any required information for the event like a meal choice or other information. This feature could also be used to offer discounted registration fees for events for a whole year but this is not the primary use case.

Overview

Members will use this feature by purchasing a special “voucher” item from an association’s store. After purchase, the member can register for events like normal but any discounts provided by the voucher will be automatically applied to one event registration.

Staff have some initial setup work to create the voucher store item and to set up the discounts that manage the accounting side of things.

Setup

Create Good/Service (Setup -> Services, Products, and Commerce)

- Example Name: Young Professionals Voucher
 - Good/Service Type: Miscellaneous
 - MUST BE: Accounting Type: Cash Basis

Create Discount Type (Setup -> Finance)

- Example Name: Young Professionals Discount Type
 - Discount Type "Event Registration"
 - Saleable Item Type "Event Registration"

Create Discount (Setup -> Finance)

- Example Name: Young Professionals Discount
 - Discount Type: Voucher (from above)
 - Date: Year
 - Total Available: (per person)
 - Discount Percent: 100%

Create Voucher (Setup -> Finance)

- Example Name: Young Professionals Voucher
 - Discount: Voucher Discount (from above)
 - Event Category: Voucher (If new one -> Setup -> Category Lists -> Events -> Add)

Create a Store Item to Sell the Voucher

- Example Name: Young Professionals Voucher
 - Price: \$100
 - Saleable Item: Voucher (From Good/Services)
 - Is Active
 - Voucher Type (1/24 Voucher from above)

Workflows

Purchase Voucher

- Go to Store and add voucher to the cart
- Login with username and password
- Pay for voucher
- Confirmation page will contain link to the Hub Events

Use Voucher on Event

- Log into the Hub as user who purchased the voucher
- Register for an event that has the correct Event Category (from section 4)
- Event will have Discounts have been applied for the user that has made the purchase

Notes and Limitations

- The user who purchased the voucher must sign in when registering for an event to receive their voucher price
 - The voucher only provides one discounted registration per event
- Vouchers used for a free event registration cannot be refunded if an attendee cancels their registration

Accounting

This assumes that the goods/services tied to an event registration are set up to be accrual-basis and recognized on the date of the event

Glossary:

- V: Voucher Good/Service
- RT: Registration Type Good/Service
- DT: Discount Type tied to Discount tied to Voucher

When a Voucher is Purchased

- Credit V Income Account
- Debit V Deposit Account

When an Attendee Registers Using a Voucher

- Credit RT Deferred Income Account
- Debit DT Deferred Discount Account

When an Event Happens

- Debit RT Deferred Income Account
- Credit RT Income Account
- Credit DT Deferred Discount Account
- Debit DT Discount Account