Flatbridge Discount Management

The Executive Programs department uses Flatbridge to manage their individual programs, as well as allows participants to register for a program. There are two different types of discounts which can apply. This document explains them and how they are used.

Information DRAFT IN PROGRESS

There are two different types of Discounts in Flatbridge and they are managed differently. They are Affiliations discounts, and Discount Codes. They are handled differently, and they are explained here.

Affiliation Discounts

Affiliation Discounts are based on your relationship with specific entities. When a Contact is registering for an Executive Education program they "self-select" an affiliation if applicable. Those available in the system are:

- Yale Graduate
- SOM Graduate
- SOM Faculty
- SOM Staff
- Non-Profit Organization
- AMA Masters Circle
- ANA Masters Circle

When one of these are selected, they are verified by the following methods:

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>Verification Method</th>
<th>Discount Amount</th>
<th>Automatic or Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yale Graduate</td>
<td>Checked via Salesforce Database</td>
<td>Automatic</td>
<td></td>
</tr>
<tr>
<td>SOM Graduate</td>
<td>Checked via Salesforce Database</td>
<td>Automatic</td>
<td></td>
</tr>
<tr>
<td>SOM Faculty</td>
<td>Checked via Salesforce Database</td>
<td>Automatic</td>
<td></td>
</tr>
<tr>
<td>SOM Staff</td>
<td>Checked via Salesforce Database</td>
<td>Automatic</td>
<td></td>
</tr>
<tr>
<td>Non-Profit Organization</td>
<td>Check by CRM</td>
<td>Manual</td>
<td></td>
</tr>
<tr>
<td>AMA Masters Circle</td>
<td>Contact sends proof to CRM for verification</td>
<td>Manual</td>
<td></td>
</tr>
<tr>
<td>ANA Masters Circle</td>
<td>Contact sends proof to CRM for verification</td>
<td>Manual</td>
<td></td>
</tr>
</tbody>
</table>

Each of these affiliations has a specific discount which is hard-coded in the Flatbridge Product. If this needs to be changed we will enter a ticket for the developer.

Note: A future enhancement request would be to retain this functionality, but store the discount value (% or dollar) in a table which can be updated by the Marketing Team.

Discount Codes

Discount codes are current disabled functionality, but when enabled, are intended work for Executive Programs as follows:

In the Marketing Menu, select Discount Codes. A table with the current Discount Codes displays with the ability to either create a new one, or review the configuration of an existing one:
Discount codes have the following properties:

- **Required Fields:** Must have a dollar amount (Discount Amount) or a Discount Percent (0-100% which applies to the total amount of the program). These are mutually exclusive (i.e., cannot be both).
- **Required Fields:** Must have Effective Date (start) and Expiration Date (end date) in which the discount can be used.
- **Format:** The Discount Code has a 50 character limit, and is alpha-numeric. Special characters, although accepted, should be avoided as a best practice.
- **Optional:** A discount code can be associated with a specific company.
- **Optional:** A discount code can be applied to specific program or programs (inclusion).
- **Optional:** A discount code can be denied to only specific programs (exclusion).
- **Optional:** A discount code apply to all Open Enrollment Programs.

When you select **New Discount** The data entry screen for creating new discount code is displayed and allows you to enter the required fields:
When all required fields have been entered, click the **Submit** button to add the new discount code.

### Using Both Affiliate Discount and Discount Codes

The Discount Codes can be used in parallel with Affiliate Discount. Executive Programs must determine if Affiliate Discount and Discount Codes can both be used, or if we would like to determine which discount is higher and apply that discount to the participant invoice.

### Data Synchronization

The discount code data is not synchronized to any other source or system at this time, there are currently no integration points for this data. It is solely used within Flatbridge during the invoice payment process.