

Interactive Price Tiers

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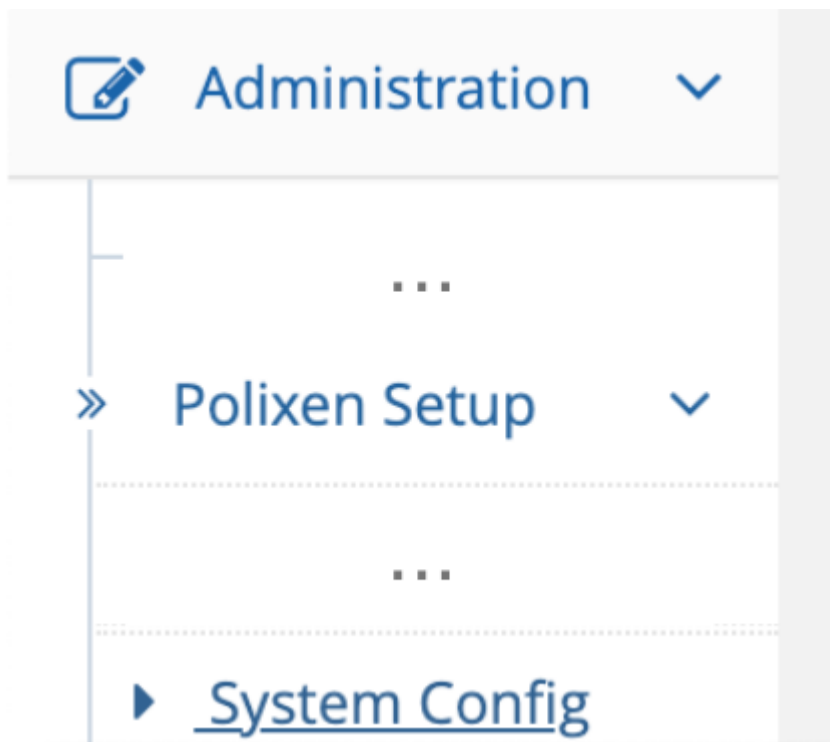
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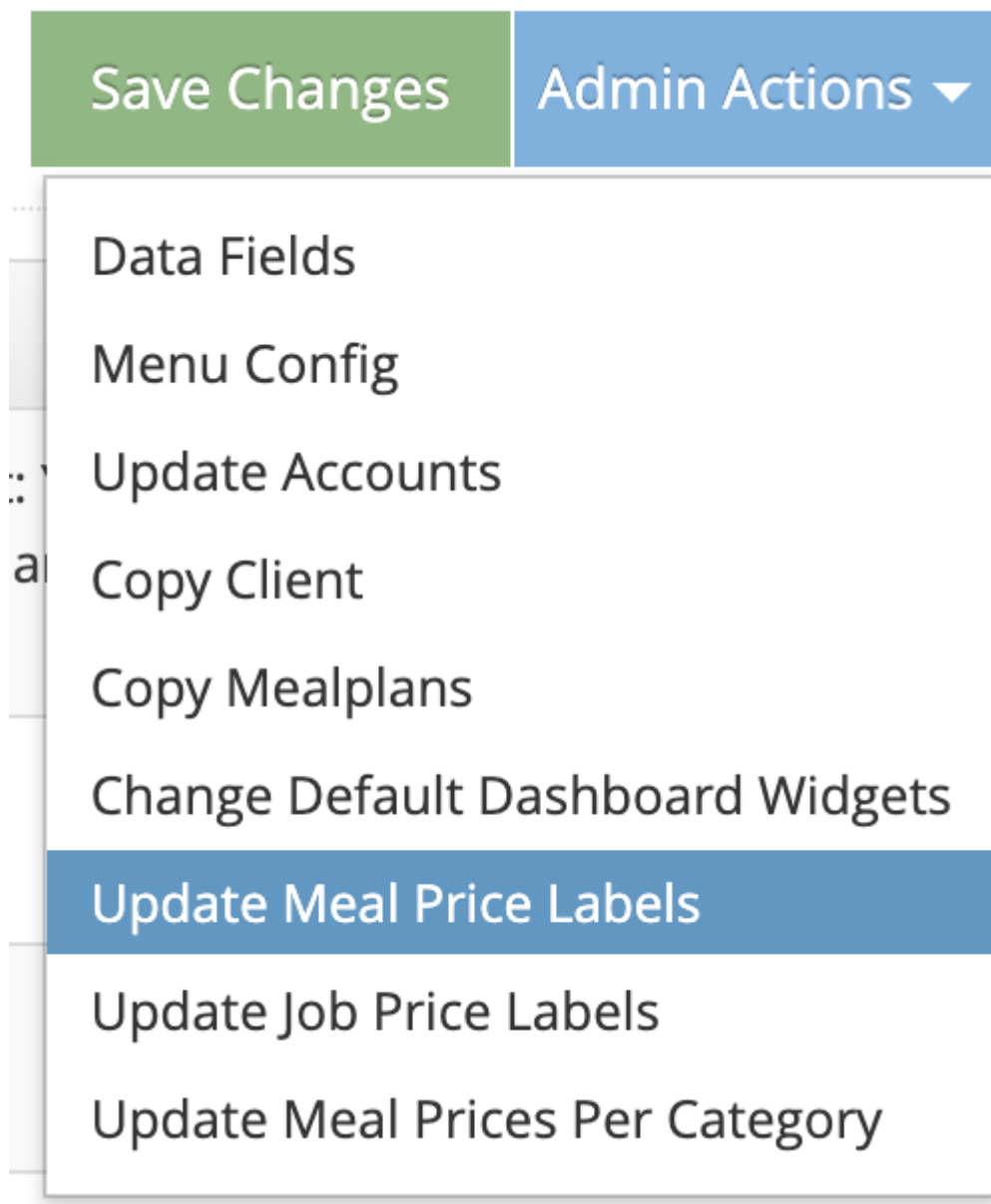
This new feature allows you to manage service outlets, providers and client groups' price tiers for both jobs and meals.

We will be rolling out this feature to systems over the coming months, but you can request to be prioritised on an opt-in basis. Please give us a call on 1300 790 592 or put in a ticket if you wish to start using this feature.

Set up Price Tiers

To set up your price tier names, go to Administration > Polixen Setup > System Config > Admin Actions. Choose "Update Meal Price Labels" or "Update Job Price Labels" according to the type of service you need to update prices for.





A pop-up box will show up, where you can include up to 8 different price tiers to a meal/job.

Meal Price Labels



Meal Price	Label
price	<input type="text" value="Retail Price"/>
cost_price	<input type="text" value="Cost Price"/>
hcp_price	<input type="text" value="Provider Split Price"/>
other_price	<input type="text" value="Client Split Price"/>
extra_price	<input type="text" value="Test"/>
extra_price2	<input type="text"/>
extra_price3	<input type="text"/>
extra_price4	<input type="text"/>
extra_price5	<input type="text"/>
extra_price6	<input type="text"/>

Save Changes

Click 'Save Changes' to update the information.

Meal & Services Price Set Up

Once the price tier labels are defined, you need to set up the prices for Meals & Services.



Please note that before changing prices, you will need to have completed your client and provider invoices up until the price change date.

We also recommend updating your Accounts and Meal Plan freeze dates to the day before your price change. You can edit these on the Administration > Polixen Setup > System Config page.

Meals

To update meal prices, go to Administration > Meals & Services. Under 'Meal Setup', select a Meal by clicking on the blue 'i' button next to it.

Then, update the meal prices and click on 'Save Changes'.

Meal Prices

Retail Price	<input type="text" value="5"/>
Cost Price	<input type="text" value="4"/>
Provider Split Price	<input type="text" value="0"/>
Client Split Price	<input type="text" value="0"/>

 Save Changes

 Delete Meal

If you would like to bulk change meal prices, please put in a ticket and our team can do that for you.

Services

To update service prices, go to Administration > Meals & Services. Under 'Services Setup', select a Service by clicking on the blue 'i' button next to it.

Service Prices

Split Provider price	<input type="text" value="7"/>
Split Client price	<input type="text" value="3.00"/>
Subsidised	<input type="text" value="4.00"/>
Unsubsidised	<input type="text" value="6.00"/>


Save Changes

Price Tiers Set Up

The interactive price tiers follow the priority order below. That means that if a client is part of a service outlet, a split provider and a client group, they get charged the group price.

1. Client Groups

Go to Clients > Client Groups. Then select one group by clicking on the blue 'magnifier' button on the left-hand side.

	Group Name
	Mens Group
	Womens Group
	COVID19

When you open the Client Group information, there is an option to set up both Meal & Job price tiers for that group.

Mens Group

Client Group Information

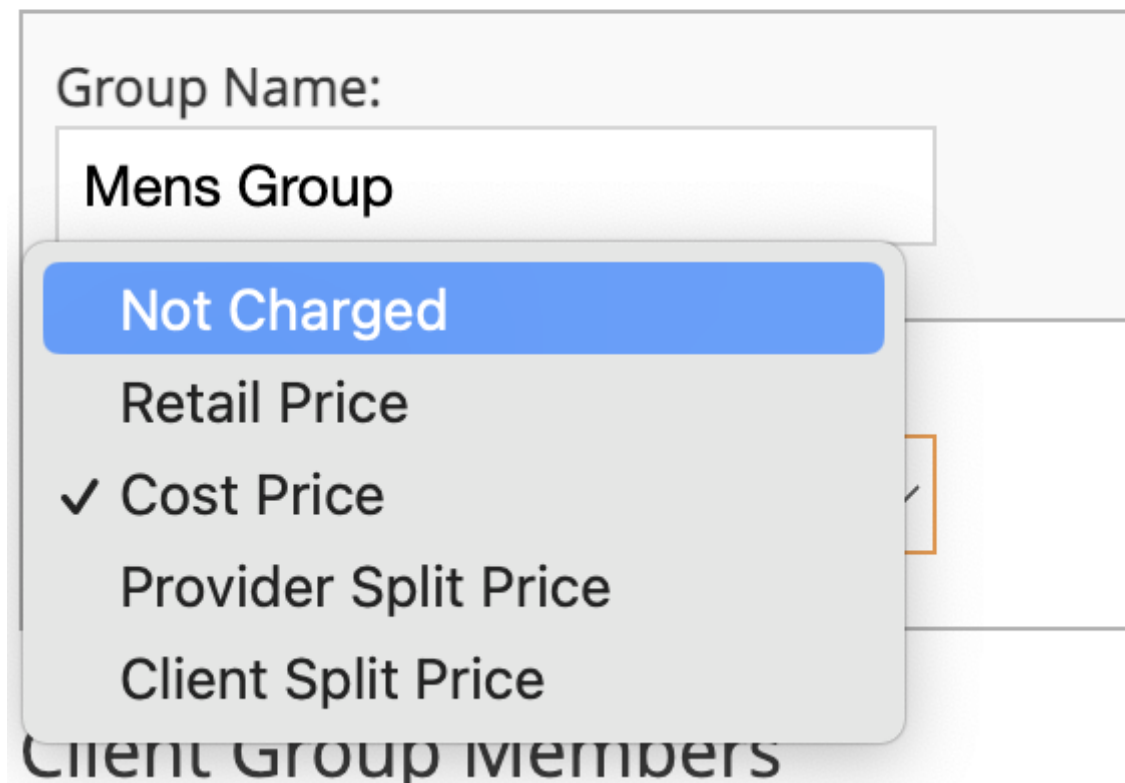
Group Name: <input type="text" value="Mens Group"/>	Service: Office A
Client Meal Price Tier: <input type="text" value="Cost Price"/>	Client Job Price Tier: <input type="text" value="Subsidised"/>

Once that is done, all clients in that group will have the selected price tiers as their default.

You can also set client groups to not have a price tier by selecting the 'not charged' option on the dropdown menu.

Mens Group

Client Group Information



Group Name:

Mens Group

Not Charged

Retail Price

✓ Cost Price

Provider Split Price

Client Split Price





Client Group Members

Please note: A client can be part of multiple groups that don't have prices, but only one group for each price type.

2. Split Package Providers


Go to Administration > Package Providers. Then select a package provider by clicking on the blue 'i' button next to it.

Package Providers » List

	Package Provider
	Anglicare
	HCP lvl2
	NDIS

Scroll down to 'Price tier information' and fill out both provider and client prices for meals and jobs.

Price Tier Information

Provider Meal Price Tier: <div>Provider Split Price ▾</div>	Provider Job Price Tier: <div>Split Provider price ▾</div>	Split Charges (Client/Provider Invoices) <div> YES ▾</div>
Client Meal Price Tier: <div>Client Split Price ▾</div>	Client Job Price Tier: <div>Split Client price ▾</div>	

Once you've done that, clients who are on that package provider and are NOT in a client group will have the client split as a default. The providers will be invoiced for the provider split prices.

If a provider is set to 'no split', you can only see prices for providers.

Price Tier Information		
Provider Meal Price Tier: <div>Not Charged</div>	Provider Job Price Tier: <div>Not Charged</div>	Split Charges (Client/Provider Invoices) <div> NO</div>

3. Service Outlet

Go to Administration > Polixen Setup > Service Outlets. Click on the blue 'i' button next to the service name.

Service Outlets » Manage Service Outlets

	Outlet Name
	Office A
	Office B

Scroll down to 'Price tier information' and fill out client prices for meals and jobs.

Price Tier Information

Client Meal Price Tier: <div>Not Charged</div>	Client Job Price Tier: <div>Unsubsidised</div>
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Once that is done, clients who are NOT on a split package provider or NOT in a client group will have the service outlet price as a default.

View a client price tier information

If you need to check the current price tiers used for a client, simply go to the client's page. The current price tier details are located under 'payments & invoices' on the Client Information Tab.

Payments & Invoices

Payment Type: <div>Running Total</div>		F [
Package Provider: <div>Please Select</div>		F [
		I [
Current Meal Price Tier: Retail Price	Current Job Price Tier: Unsubsidised	