

Removing Previous Discounts before Using Petly* Plans Automatic Discounting with Cornerstone* 8.6 NEXT

If you have previously attached 100% wellness plan discounts to invoice items, you should manually **remove** these previous discounts before using Petly* Plans automatic discounting.

Here's why:

The previous discounts will be removed whenever Petly Plans automatic discounting is applied to invoice items.

However, the previous discounts will **not** be removed whenever the Petly Plan discounts cannot be applied, for example when:

- The client has reached the quantity limit for the Petly Plans item covered under their plan.
- The item is not covered under Petly Plans.
- The client is not a Petly Plans subscriber.

Manually removing the previous discounts ensures that these discounts won't be applied in error.

Removing the previous discounts requires three steps:

1. Remove the previous discount from each Petly Plans invoice item.
2. Remove the previous discount from each Petly Plans client record.
3. Inactivate the previous discount.

Here's how to accomplish the tasks above:

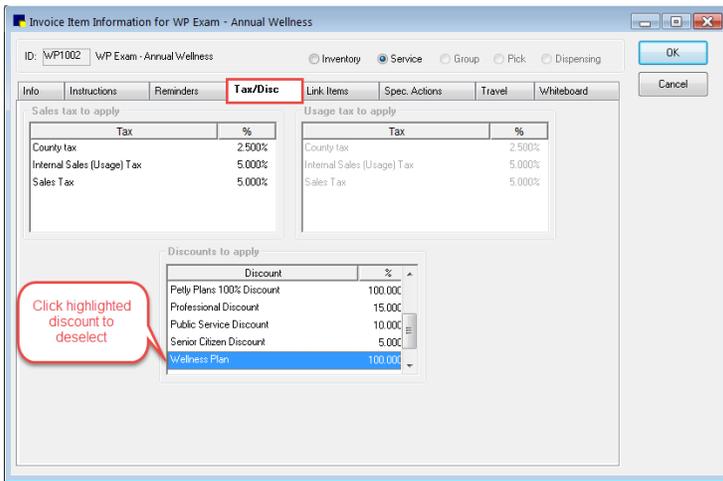
1. Remove the previous discount from **each Petly Plans (WP code) item**.
 - a. Go to **Lists > Invoice Item**, and then search for the plan items.

Tip: If all plan items are set up under a single class (e.g., WP), enter the class ID in the **Classification** field on the Invoice Item List window.

Description	Classification	Price	ID	Type
WP Blood Pressure Check	Wellness Plan	\$27.76	WP8256	S
WP Bordetella Booster (ORAL)	Wellness Plan	\$14.00	WP2560	S
WP Bordetella First vaccine	Wellness Plan	\$14.00	WP1101	S
WP Copay	Wellness Plan	\$0.00	WP1010	S
WP DA2 PP with lepto	Wellness Plan	\$28.50	WPDHL3	S
WP DA2P/CPV First Vaccine	Wellness Plan	\$23.00	WP1121	S
WP DA2P/CPV Second Vaccine	Wellness Plan	\$23.00	WP1122	S
WP DA2P/CPV Third Vaccine	Wellness Plan	\$23.00	WP1123	S
WP DA2PP booster vaccine	Wellness Plan	\$23.00	WPDA2	S
WP Dental Grade 2 Feline	Wellness Plan	\$128.81	WPDG2F	S

- b. Select an item, and then click **Update**.

- c. On the Tax/Discount tab, deselect your 100% plan discount and then click **OK**.

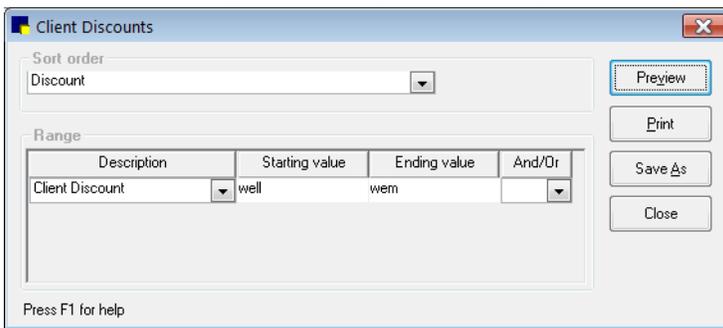


- d. Repeat these steps for each WP code item.

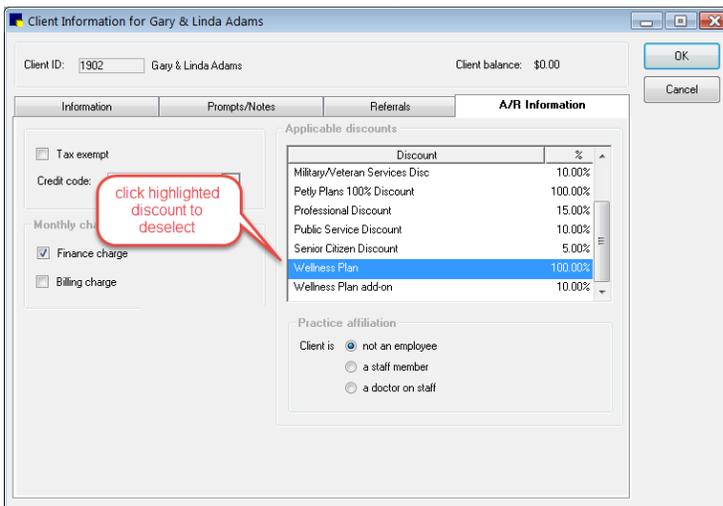
Tip: You can use Mass Markup to remove the discount from all items, but you must have exclusive use of the Cornerstone database to do so (everyone else must be logged off).

2. Remove the previous plan discount **from every client record**.

- a. To identify clients who have discounts, use the Client Discount report (**Reports > Client**), sorted by discount, with a range based on your discount plan name.



- b. From the Patient Clipboard*, search for and select a client.
 c. Right click the **Client ID**, select **Update**, and then select the **A/R Information** tab.
 d. In the Discount area, deselect the previous discount and then click **OK**.

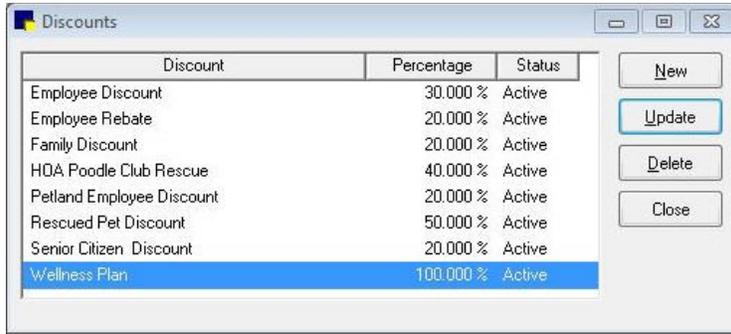


- e. Repeat these steps for each client with the previous discount plan.

3. **Inactivate the previous plan discount** to ensure it is not manually applied to nonplan items in error.

a. Go to **Controls > Discounts**.

b. Select the discount, and then click **Update**.



c. Set the Status to **Inactive** and then click **OK**.

