

Remote Pricing Implementation

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Rate Schedules
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Create a Rate Schedule

Rate Schedule Name	Pricing Rate Type
<input type="text"/>	<input type="text" value="Event Types"/>
Credit Account Code	Debit Account Code
<input type="text"/>	<input type="text"/>

Billable Items

[Select Types](#)

Tax Schedules

[Add Tax Schedules](#)

Price Sheets and Formulas

[Add Pricing Sheet](#)

Description of Professional Services

A CollegeneT consultant provides consulting (via videoconferencing) regarding the implementation of 25Live Pricing and works with the institution to collect rate sheets for campus location rentals and resource charges. Those rate sheets are then used to generate a spreadsheet of proposed formulas for those objects and the consultant builds those formulas.

In preparation for the remote service, the consultant will review the customer’s locations, resources, organization types, and event types and may suggest changes that are in line with best practices for implementation.

Content covered includes the following:

- Organization Types for Pricing Implementation
 - Reviewing Existing Organization Types
 - Revising Organization Types as Needed for 25Live Pricing Implementation
- Implementation of 25Live Pricing
 - Create rate groups and attach to organization types
 - Create tax schedules
 - Create rate sheets for location rental charges
 - Create rate sheets for resource and setup rental charges

- Create any charges for Requirements (Other) or Event Types
- Testing the 25Live Pricing Implementation
 - Test pricing charges by creating events in the client's database and checking them for proper calculation
 - Test altering the rate group in the Pricing tab in 25Live to assure that updates are calculating appropriately
- Training for System and Functional Administrators to administer pricing
 - Review of the implementation
 - Understanding how effective dates work
 - Basic administration of pricing

Intended Audience

This training is designed for functional administrators and event schedulers responsible for setting up, testing, and using event pricing.

Schedule

The CollegeNET consultant will lead two (2), 2-hour remote meetings over the course of the implementation. The consultant will build the formulas offline and will use the two remote sessions to review event charges with the administrators at the campus and to review the results of the implementations of the rate sheets after formulas are built. The consultant may use up to 6 to 9 hours of additional offline consulting work implementing the rate sheets.

Prerequisites

Customer will provide the following resources to CollegeNET:

- All implementation team members must be assigned and staffed prior to the service delivery.
- Access to all Series25 solutions.
- Ability to log in to Series25 using an administrative account.
- Rate sheets of charges for location rentals and resource and setup charges.
- Build and provide example events of how the campus utilizes locations and resources in light of how that might appear with a pricing implementation.
- Computer workstations with Series25 access for all training participants
- For Customers with Shibboleth enabled, the Customer must provide a Shibboleth test account to CollegeNET to enable authenticated access into 25Live instances.
- CollegeNET recommends utilizing videoconferencing for all remote sessions.

Please contact your CollegeNET Account manager for pricing and scheduling details. ([Series25 Account Management](#))