

Loading Discounts and Surcharges

This chapter explains how discounts and surcharges are applied at booking, plan line, and bulk levels within MEplan. It also outlines how discount visibility, editability, and inheritance behave across schedules and how Discount Groups configured in MEvision sync with MEplan. It is important to note that modifying or deleting discount/surcharges must be done in the same manner that they were applied.

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Booking Deal Discounts

Applying Discounts and Surcharges at Booking Level

Applying Booking Deal Discounts

Discounts and surcharges can be applied directly at booking level via the **Booking Deal** screen.

To access Booking Deals:

1. In **Month View**, select a booking value within the calendar
2. In **Day View**, select the booking value for the specific date

Within the Booking Deal pop-up:

1. Select the **Discount or Surcharge Type**
2. Enter either a **percentage (%)** or a **value**
3. Specify whether the discount or surcharge is applied to the **Customer**
4. Select **Save (📁)** to apply the change

The Booking Deal pop-up includes multiple tabs that provide visibility into all discount sources associated with the booking:

- **Vendor Deal Discounts:** Displays discounts applied on the vendor side
- **Customer Deal Discounts:** Displays discounts applied on the customer side
- **Discounts:** Displays a consolidated view of all discounts applied to the booking

Editing Booking Deal Discounts

To amend an existing discount:

1. Select the **edit icon (✎)** on the discount line
2. Update the percentage or value
3. Specify whether the modification applies to the **Customer**
4. Select **Save (📁)** to apply the change



Note:

- The **Discount Code** and **Discount Type** are not editable
- If these need to be changed, the discount must be removed and recreated

Removing Booking Deal Discounts

To remove a discount or surcharge:

1. Set the percentage or value to **0**
2. Specify whether the modification applies to the **Customer**
3. Select **Save (🔒)** to apply the change

The discount will be removed from the booking.



Plan Line Discounts

Applying Discounts and Surcharges at Booking Level

Applying Plan Line Discounts/Surcharges

Plan Line Discounts apply to **all bookings associated with a specific plan line**.

To add a Plan Line Discount:

1. Open the plan line **options** menu ()
2. Select **Line > Plan Line Discounts**
3. Select the **Add (+) icon** to add a new line
4. Choose the **Gross/Nett, Pre/Post Rate, Discount Type** and enter the relevant value or percentage
5. Select **Save** () to apply



When saving, the user can choose:

- Whether the discount applies to the **Client**, the **Vendor**, or **both**
- Whether the discount should be applied to **existing bookings** on the line

If **Yes** is selected, the discount updates all existing bookings on the plan line. If **No** is selected, the discount applies only to bookings created after the discount was added.

Modifying Plan Line Discounts

To modify a Plan Line Discount:

1. Select the **edit icon** () on the discount line
2. Apply the modification
3. Select **Save** () to apply

When saving, the user can choose:

- Whether to update existing discounts (**Existing bookings**)
- Whether to update all discounts (**Existing and new bookings**)
- Whether to update none (**No changes are made**)

Removing Plan Line Discounts

To delete a Plan Line Discount:

1. Select the **delete icon** () the discount line

The discount will be removed from both the Plan Line Discounts menu and all affected bookings.

Bulk Discounts/Surcharges

Applying Bulk Discounts/Surcharges

Bulk Discount Updates allow users to apply or remove discounts and surcharges across multiple bookings simultaneously, based on **Vendor / Media Owner** and **date range** criteria.

To perform a bulk update:

1. Select the schedule's **options** menu () on the right-hand side of the schedule
2. Choose **Update Discounts**

The **Bulk Update Discounts** pop-up allows the user to define:

1. Vendor / Media Owner
2. Discount or Surcharge start and end dates
3. Discount Type
4. Select the **Add Discount** check box
5. Discount value or percentage
6. Whether the discount should be passed on to the **Customer**

Once all required fields are completed, select **Update** to apply the changes.

“ Note: Bulk discounts can only be added or removed but not modified.

Deleting Bulk Discounts/Surcharges

The **Bulk Update Discounts** pop-up allows the user to define:

1. Vendor / Media Owner
2. Discount or Surcharge start and end dates
3. Discount Type
4. Select **Remove Discount**

Once all required fields are completed, select **Update** to apply the changes.

Discount Groups on Parent Lines

Discount Groups on Parent Lines

Discount Groups are configured in **MEvision** and may consist of one or more discount types grouped together.

Discount Groups can be set to **auto-load** in MEvision. When auto-load is enabled, the Discount Group automatically appears on the **parent plan line** in MEplan.

Discount Group Applicability Rules

Discount Groups are governed by the configuration parameters defined in MEvision, which may include:

- Customer
- Medium Type
- Vendor
- Date range
- Additional qualifying criteria

A Discount Group selected or auto-loaded on a parent line in MEplan will only apply if the plan line meets **all corresponding MEvision configuration criteria**.

If the plan line does not meet the defined parameters, the Discount Group will not apply.