

Help Articles > Administrator Help > FAQs > How to create/manage promotion codes

# How to create/manage promotion codes

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Promotion Codes or Promo Codes allows you to give a discount on Membership and/or Products. For Events, the Promo Codes would have to be created in the event it self. <u>To learn how to do this, please click here</u>.

### **Accessing Promotion Codes**

- 1. Click **Settings** or the **Gear** icon on the left menu.
- 2. Click the **E-Commerce & Financial** tab
- 3. In the E-Commerce section, click **Promo Codes**.

#### **Promotion Codes**

On the Promotions page, it displays the current promo codes. There are two management action options on promo codes:

- Edit Allows you to edit the promo code.
- **Delete** Deletes the promo code. Note, that this option only shows for promo codes that have not been used. Once the promo code is deleted, it cannot be restored.

## Adding a Promotion Code

- 1. Click on the Add Discount Code button.
- 2. You will now see several fields to begin entering the promo code details:
  - **Label** The name of the promo code.
  - **Description** A description of the promo code.
  - Promotion Code The code which would be used by the member or user to get the discount.
  - o **Promotion Type** If the promo code gives a certain dollar amount or

percentage off.

- Amount Gives a certain dollar amount off.
- Percent Gives a percentage off.
- **Promotion Fee Type** What the promo code can be used against.
  - Initial Fee The initial membership fee.
  - **Membership Fee** The re-occurring membership fee.
  - **Total** The total of the invoice.
- **Amount** The dollar or percentage amount.
- **Limit** How many times it can be used in total.
- **Currency** The currency the promo code is in.
- From Date The start date of when the promo code can be used.
- **To Date** The end date of when the promo code will no longer be accepted.
- Form Availability If the promo code can be used for new members, renewing members, or both.
  - Both New and Renewal New and renewing members can use the code.
  - New Only Only new members can use the code.
  - Renewal Only Only renewing members can use the code.
- Connected Bundle A versatile package of pre-defined triggers that are
  activated upon the promo code being applied. A bundle essentially is a
  collection of action-based tasks that are designed to carry out specific update
  requests to a member profile (e.g. update the profile with custom text). Please
  contact us to create connected bundles for promo codes, should you wish to
  use this functionality.
- 3. Click **Save** to create the promo code.

# Promotion Usage Report

The Promotion Usage Report shows who and when a person used the promo code.

- 1. To access the Promotion Usage Report, click on the number of times the promo code was used. This will redirect you to the report.
- 2. When viewing the report, there are several search filters:
  - **Date** The date when the promo code was used.

- **Bill To** Who used the promo code.
- **Status** The status of the invoice the promo code was used on.
- **Order Type** The type of order the promo code was used on.
- **Membership Type** The Membership Type the promo code was used on.
- **Price Plan** The Price Plan the promo code was used on.
- **Events** The Event the promo code was used on.
- **Promotion Codes** The promo code(s) that was used.
- 3. A chart displays details on who used the promo code, when, and information about the promo code:
  - o Order By Who used the promo code.
  - **Date** When the promo code was used.
  - Order Number The order number the promo code was used on.
  - **Invoice No** The invoice number the promo code was used on.
  - **Promotion Description** The name of the promo code.
  - **Amount** The amount of the promo code.
  - Promotion Code The code which would be used by the member or user to get the discount.
  - Description If a promotion code created in an event was selected in the "Promotion Codes" filter, it will display the event name in this column.
  - **Actions** The actions you can take on the report.
    - View Views the order.
    - **Email** Option to email the invoice to the person.
    - **View PDF/Print** Displays a printable PDF version of the invoice.

### How to Export the Promotion Usage Report

- 1. To access the Promotion Usage Report, click on the number of times the promo code was used. This will redirect you to the report.
- 2. Optional: Use the search filters to filter the Promotion Usage Report.
- 3. Use the check-mark box to mark which ones you want to export and click the **Export** button.
- 4. A pop-up will display showing the progress of the export.

Alternatively, click **Download CSV**.

5. Once the report is ready, it will automatically download to your computer.