How to create/manage promotion codes

David H. - 2023-11-07 - FAQs

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. To learn how to do this, please click here.

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.
    - **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:
    - **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.

5. Once the report is ready, it will automatically download to your computer. Alternatively, click **Download CSV**.