

# Promo Codes – Quick Guide

This document is a guide to using the “**Registration Groups as Promo Codes**” module in Certain.

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## Introduction

The new module, which was added in the Certain 5.5 release, is called “**Registration Groups as Promo Codes**”. Why that name?

Prior to Certain 5.5, many users had been using Certain’s **Registration Groups** module to handle their requirements for promo codes.

When the *new* module is enabled, you use a slick new **Promo Code Wizard** to add and edit promo codes in four easy steps (see page 3), including creating the associated fixed or percentage discounts.

We also introduced some new functionality, including **Total Inventory** and **Availability**. (The latter determines when a promo code becomes available for use.)

Everything is described in this Quick Guide, but as always, there’s even more detail in the Page Help in Certain. Click  **Help & Support** in the top right corner, and then select  **Page Help**.

**Note:**

“Under the hood” the new module still uses **Groups** and **Agenda Items** to assign the associated discounts.



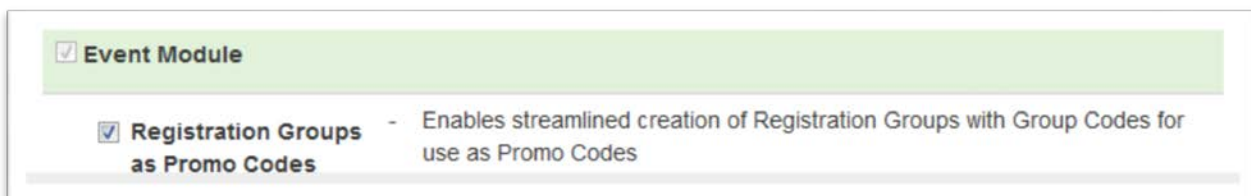
## Discounts

When creating a promo code in the **Promo Code Wizard**, you assign one or more discounts to it (in the **Discounts** step – see page 5).

They are created as **Fee**-type agenda items and will therefore also appear under **Event Setup > Agenda**.

## Enabling the Module

To enable **Registration Groups as Promo Codes** for an event, go to **Plan > Configure > Functional Areas Needed by This Event**, and select that sub-module under the Event Module.



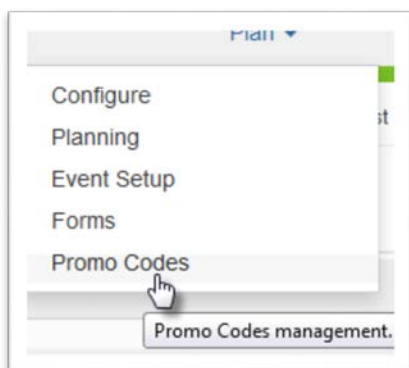
**Important Note:** The original “Registration Groups” module and the new “Registration Groups as Promo Codes” module are mutually exclusive: **you cannot enable both modules in the same event.**

(Similarly, you cannot enable both the “Registration Groups as Promo Codes” and “Rotations” modules in the same event.)

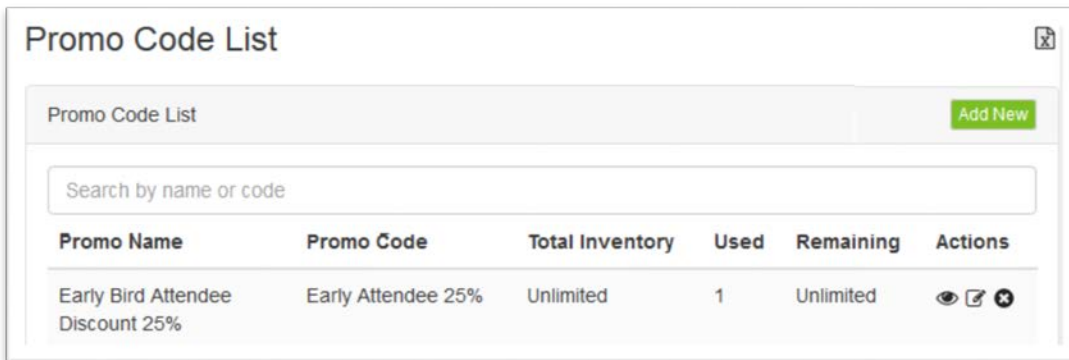
## Using the Module




When an attendee registers with a valid promo code, the discount(s) assigned to that code are applied to their fees. You make that possible by adding a Promo Codes section to the registration form (see page 7).




When the module is enabled, a **Promo Codes** option is available under **Plan** on the top level navigation bar.



That takes you to the **Promo Code List** page, which displays the list of existing promo codes.




Promo Name	Promo Code	Total Inventory	Used	Remaining	Actions
Early Bird Attendee Discount 25%	Early Attendee 25%	Unlimited	1	Unlimited	  

- To search for a promotion, type any part of a **Promo Name** or **Promo Code** in the **Search by name or code** text box. The list is updated dynamically as you type, to show only the matching promo codes.
- To edit an existing promotion, click the  **Edit** icon in the **Actions** column, and use the **Promo Code Wizard** to modify the promotion.
- To create a new promotion, click the **Add New** button, which will launch the **Promo Code Wizard**.
- To view a listed of completed registrations that have used a promo code, click the  **View Registrations** icon in the **Actions** column.
- To export the list of promo codes to Excel, click the  Excel icon.

## Promo Code Wizard

The **Promo Code Wizard** is where you enter or edit the details of a promo code (which you might think of as a "promo" or "promotion").

It is displayed when you click **Add New** to add a promo, or  to **edit** an existing one, and consists of these four steps:

1. [Overview](#) (Page 4)
2. [Discounts](#) (Page 5)
3. [Availability](#) (Page 5)
4. [Done](#) (Page 6)


When adding a new promo, click **Next** at the end of each step to continue.

When editing an *existing* promo, you can skip straight to a step by clicking its name at the top of the wizard.

## Overview

Enter the basic details for the promo code.

### Promo Code Wizard ×



Promo Name\*

Promo Code\*

Code Inventory

All Attendees  
 Other

Attendee Types \*

### 1 - Overview

- **Promo Name** – A descriptive name for internal use.
- **Promo Code** –The code used by the attendee when registering. (Unique in the event.)
- **Code Inventory** – The maximum number of times this promo code may be used; up to 999999.

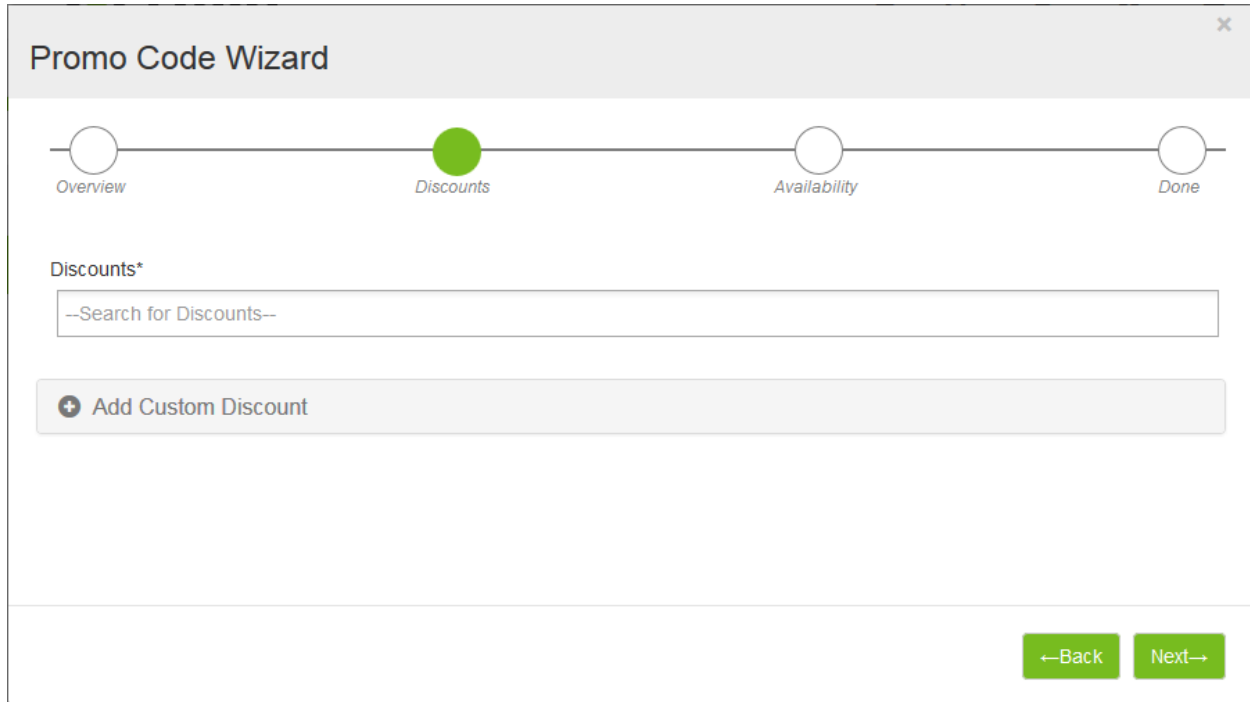
*Default = Unlimited. (Blank also equates to "Unlimited".)*

**Caution:** Entering **0** is treated as **zero**, not as unlimited. Zero inventory would mean the code couldn't be used at all.

- **Attendee Types** – The attendee types who can use this promo code.

## Discounts

Select or create one or more discounts to be applied when an attendee uses this promo code.



### 2 - Discounts

**Discounts** – Click to search for discounts, and select from the list which is then displayed.

The list of discounts is as per **Event Setup > Agenda Items** (fees with negative amounts, that have unlimited inventory). These include any created in this wizard as custom discounts for promo codes (including the current one).

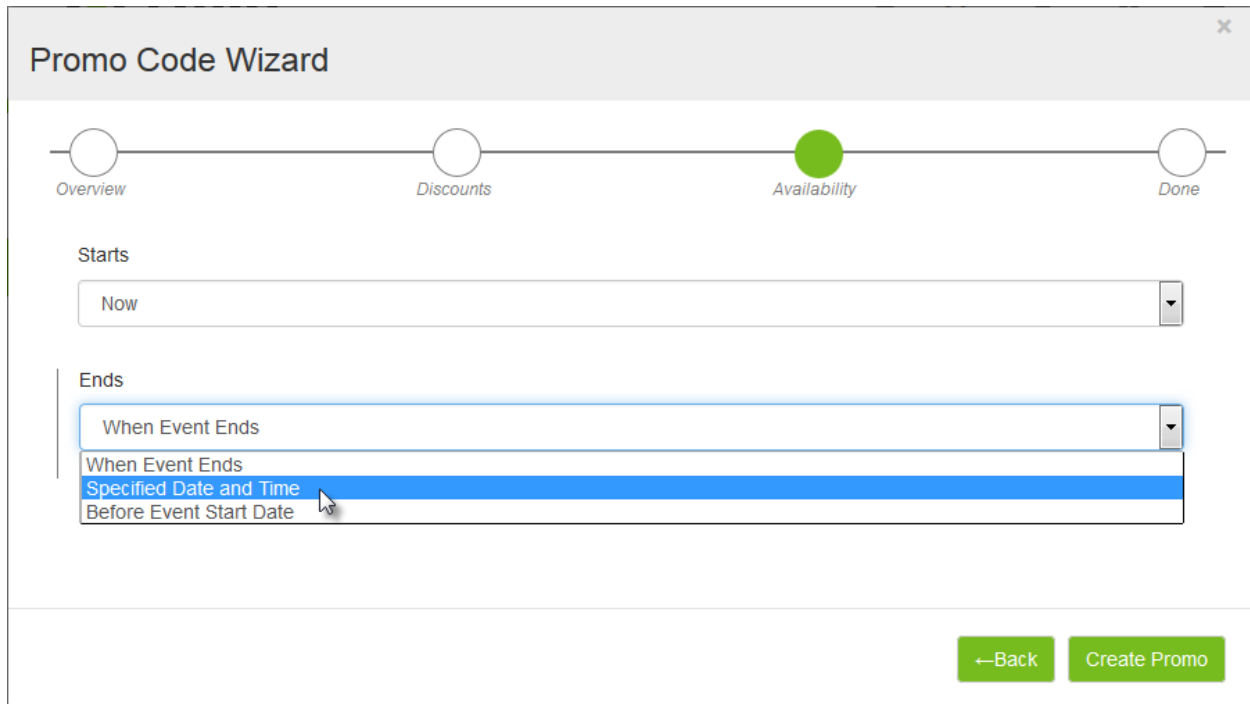
**Add Custom Discount** – Click to add a new discount by completing the extra fields displayed:

- **Discount Name**
- **Unique Code**
- Select **Fixed Discount**, and enter the **Discount Amount**. Or:
- Select **Percentage Discount**, and enter the **Percent (%)** figure.

Click **Add to List**. The discount record is created, and automatically added to the **Discounts** field for this promo code. It is created as a **Fee**-type agenda item and will therefore also appear under **Event Setup > Agenda**.

## Availability

Specify when the promo starts and ends. It will only be available for use by attendees during that window.



### 3 - Availability

**Starts** – Select one of the three options for when the promo becomes available:

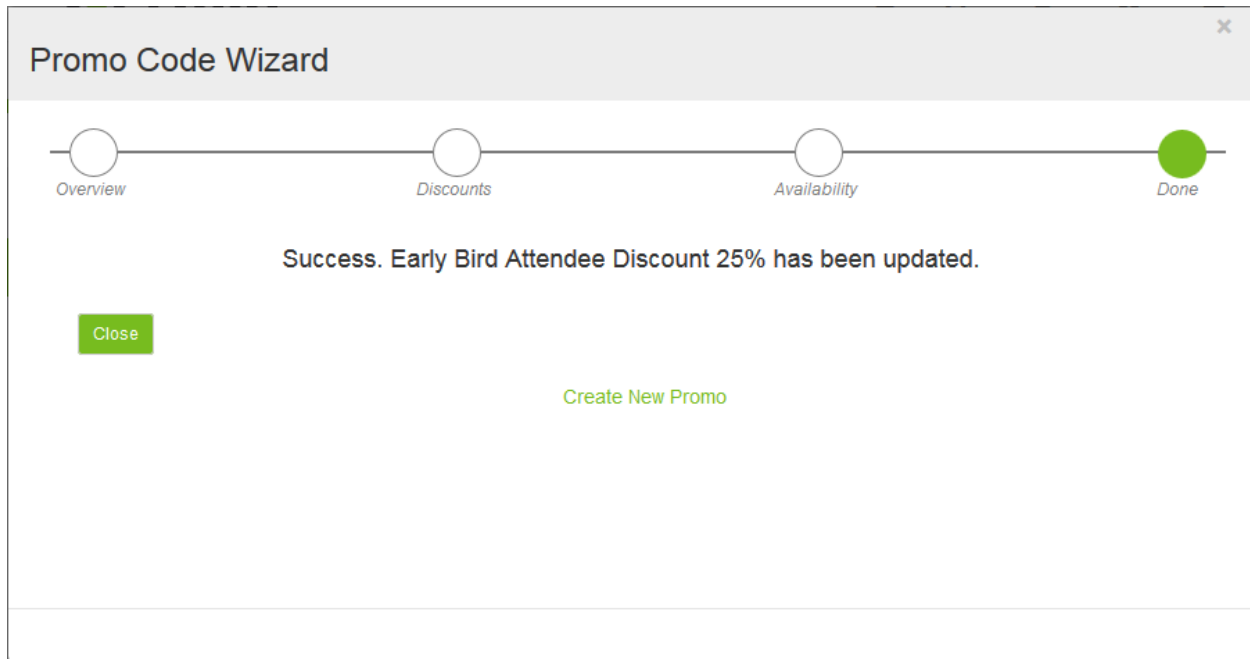
- **Now** – Immediately. (The default.)
- **Specified Date and Time** – Select a **Start Date** (or enter it in mm/dd/yyyy format), and enter a **Start Time** (e.g. 8:00 AM).
- **Before Event Start Date** – Select numbers in any of these fields to determine at what point before the event's Start Date the promo becomes available: **Months**, **Days**, and/or **Hours**.

**Ends** – Similarly, select one of the three options for when the promo *ends*:

- **When Event Ends** – Availability ends on the event's End Date/Time.
- **Specified Date and Time** – Select an **End Date** (or enter it in mm/dd/yyyy format), and enter an **End Time** (e.g. 8:00 AM).
- **Before Event Start Date** – Select numbers in any of these fields to determine at what point before the event's Start Date the promo becomes no longer available: **Months**, **Days**, and/or **Hours**.

### Done

Click **Close** to close the wizard, or **Create New Promo** to add another one.



4 - Done

## More Features

### Imports

There are options to **Import Promo Codes** and **Import Discounts** from **.CSV** files. (See the Page Help for full details.)

If you will be importing **Promo Codes**, you may need to import **Discounts** first, because the Promo Code import file must specify discount codes that already exist in the event.

**Note:** You can update existing Promo Codes by importing a **.CSV** file with Promo Codes that already exist in the event. The same applies to importing discounts to update existing records.

### Reports

To report on the use of promo codes, go to **Reports/Analyze**, and add a report of type **"Registration Groups with Promo Codes"**.

Such a report returns one row per registration; columns and filters include all *Registration Groups as Promo Codes* fields.

### Forms

To enable attendees to enter a promo code in a registration form, add a **Promo Codes Section** to the form.

The attendee will see a field in which they can enter a promo code. You can determine whether that is a required field (that is, whether they *must* enter a promo code), and you can configure the error messages they may see.

Two notes about where to place the **Promo Codes** section in the **Online Form Sequence** when adding it to the form on the **Form Setup** page:

1. **After** the **Attendee Type** section. Promo codes are based on attendee type, so the Promo Codes form section must come after the Attendee Type section. You can put both on the same page, though.  
(If Promo Codes was earlier in the sequence, there would be no promo codes available to the attendee.)
2. **Before** the **Verify** and **Payment** sections, so that the promo code's discounts will be applied to the fees.

**Important Note:** If a registration with a promo code is edited **via a form**, changing or removing the promo code, any **discount** assigned with the original promo code will **not** be removed; the planner will need to remove it on the admin side.

## Discounts Assigned via Forms

Two notes about discounts assigned via promo codes.

### 1. Assigning Discounts

Discounts tied to promo codes are **only** assigned to a registration when the registrant enters a promo code on an attendee form.

**Warning:** If a planner assigns a promo code to a registration via the admin interface, then any associated discounts are **not** added – the planner must assign them manually.

### 2. Removing Assigned Discounts

When discounts have been assigned to a registration because they're tied to a promo code, they are removed automatically **only** if the registrant changes the promo code on an attendee form.

**Warning:** If a planner changes a registrant's promo code via the admin interface, that action does **not** remove the assigned discounts – the planner must remove them manually.

## Best Practices

Some suggested best practices:

- Make the names of discounts self-explanatory, including the percentage or \$ amount. They're what you see when searching for discounts to apply to new promo codes.





- When you have created a discount in the Promo Code Wizard, do *not* change its inventory by editing it in Event Setup > Agenda.
- Nor should you modify the fee expiration date there, making it expired; otherwise the appropriate discount will not be applied.
- Do not add more than one **percentage** discount to a promo code.

