

Creating Promo Codes

Last Modified on 10/23/2024 10:44 am EDT

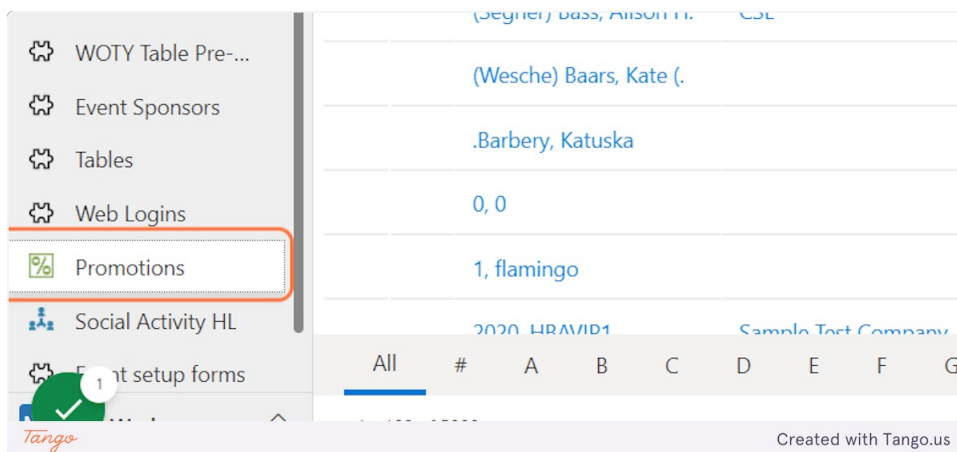
Creating Promo Codes & Attaching to Event Registration

Creation Date: Aug 25, 2022

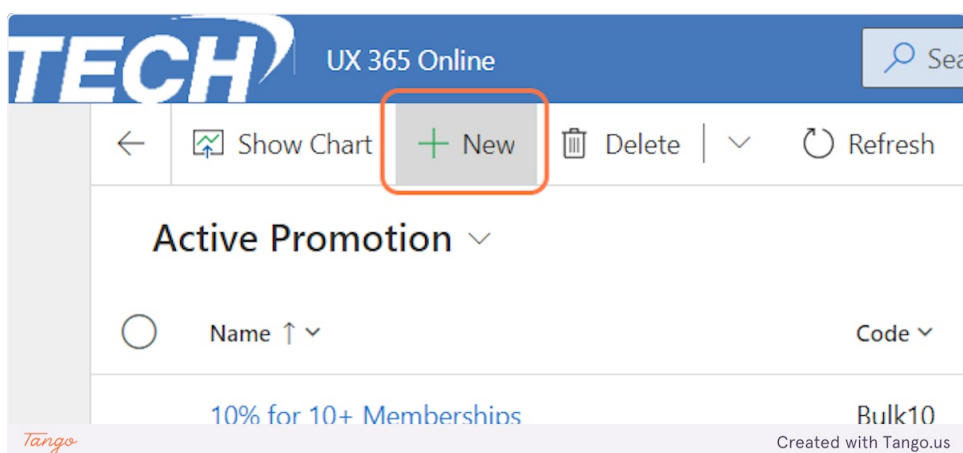
Created By: Bridget Fairbanks

1. LOG INTO PROTECH

2. SCROLL DOWN AND CLICK ON PROMOTIONS



3. CLICK ON NEW



4. TYPE IN THE NAME/SHORT DESCRIPTION OF THE CODE

← Save Save & Close + New Flow

New Promotion

Promotion · Summary

General Notes

Name *	22AC - WMHD Selfie-Station Winner - 100% off AC registration	Promotion Code *	---
Start Date *	---	End Date *	---
Discount Type *	Flat Price	Amount *	---
HBA Total Codes Available	---	Owner *	

Tango Created with Tango.us

5. CLICK ON THE CALENDAR ICON NEXT TO START DATE

-Station Winner - 100% off AC registration	Promotion Code *	---
	End Date *	---
	Amount *	---
	Owner *	

Tango Created with Tango.us

6. SELECT THE START DATE

al Codes	31 1 2 3 4 5 6	May Jun Jul
de Uses Left	7 8 9 10 11 12 13	Sep Oct Nov
	14 15 16 17 18 19 20	
	21 22 23 24 25 26 27	
	28 29 30 31 1 2 3	

Tango Created with Tango.us

7. CREATE THE PROMOTION CODE THAT YOU WANT THEY TO USE (IN THIS EXAMPLE WE ARE USING: 22ACWMHD)

* 22ACWMHD

* ---

* ---

Tango Created with Tango.us

8. SELECT THE EXPIRATION DATE OF THE CODE

* November 2022 ↑ ↓ 2022 ↑ ↓

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

Jan Feb Mar Apr

May Jun Jul Aug

Sep Oct Nov Dec

Tango Created with Tango.us

9. IN THE DISCOUNT TYPE FIELD CHANGE IT TO: PERCENT

General Notes

Name	* 22AC - WMHD Selfie-Station Winner - 100% off AC registration	Promotion Code	* 22
Start Date	* 08/25/2022	End Date	* 11/
Discount Type	* Percent	Amount	* ---
HBA Total Codes Available	---	Owner	*
HBA Total Codes Used	---	Currency	
HBA Code Uses Left	---		

Tango Created with Tango.us

10. IN THE AMOUNT FIELD TYPE: 100 (THIS WILL GIVE THEM A 100% OFF DISCOUNT)

*	22ACWMHD
*	11/05/2022
*	100.00
*	Fairbanks, Bridget
	US Dollar

Tango Created with Tango.us

11. IN THIS FIELD TYPE HOW MANY CODES ARE ALLOWED TO BE USED.

Name	* 22AC - WMHD Selfie-Station Winner - 100% off AC registration	Promotion Code	* 22
Start Date	* 08/25/2022	End Date	* 11/
Discount Type	* Percent	Amount	* \$10
HBA Total Codes Available	1	Owner	*
HBA Total Codes Used	---	Currency	
HBA Code Uses Left	---		

Tango Created with Tango.us

12. IN THIS FIELD ALWAYS START THE COUNTER AT 0

Start Date	* 08/25/2022	End Date	* 11/
Discount Type	* Percent	Amount	* \$10
HBA Total Codes Available	1	Owner	*
HBA Total Codes Used	0	Currency	
HBA Code Uses Left	---		

Tango Created with Tango.us

13. IN THIS FIELD TYPE THE REMAINING CODES AVAILABLE

Discount Type	Percent	Amount	\$10
HBA Total Codes Available	1	Owner	
HBA Total Codes Used	0	Currency	
HBA Code Uses Left	<input type="text" value="1"/>		

Apply Promotion

Tango Created with Tango.us

14. CHECK MEETINGS (20) - THIS MEANS THAT THE CODE CAN ONLY BE USED ON EVENT REGISTRATIONS

All Products	<input type="checkbox"/>
Membership (10)	<input type="checkbox"/>
Meetings (20)	<input checked="" type="checkbox"/>
Subscriptions (40)	<input type="checkbox"/>
Product Sales (50)	<input type="checkbox"/>

Tango Created with Tango.us

15. CLICK ON SAVE

UX 365 Online

←
↗
 Save
 Save & Close
 New

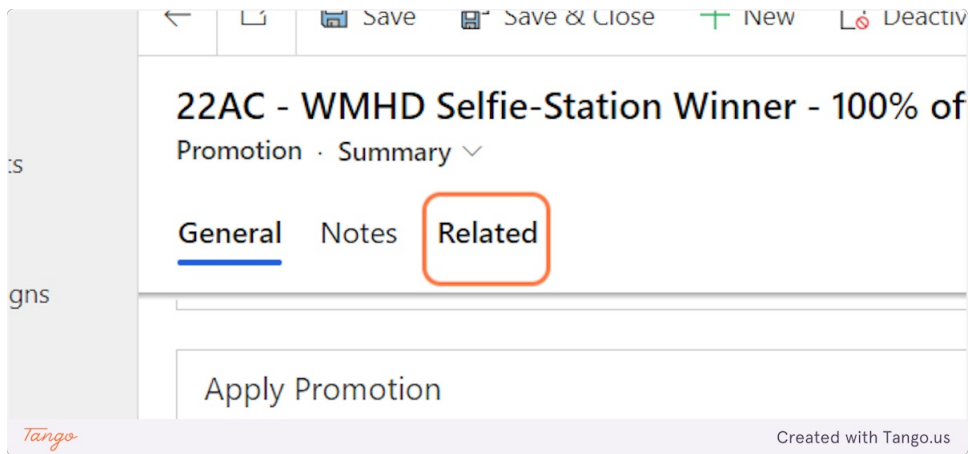
New Promotion - Unsaved

Promotion · Summary ▾

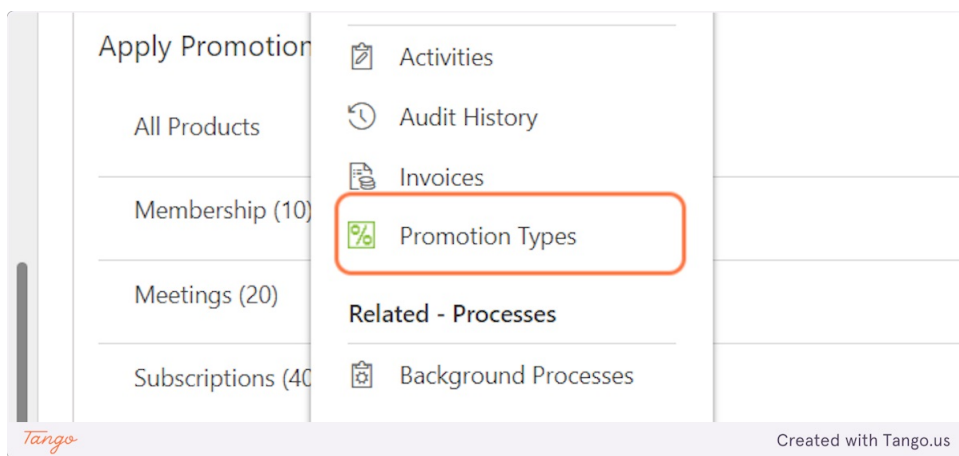
General Notes

Tango Created with Tango.us

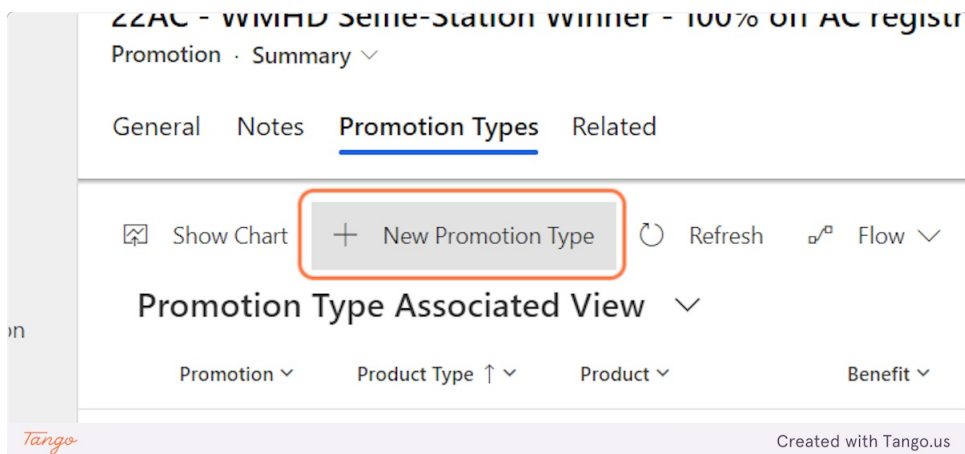
16. CLICK ON RELATED



17. CLICK ON PROMOTION TYPES



18. CLICK ON NEW PROMOTION TYPE



19. CLICK ON MEETING REGISTRATION FROM PRODUCT TYPE

UX 365 Online

Save Save & Close + New Flow

New Promotion Type

General

Product Type * --Select--

Owner * Fairbanks, Bridget

Tango Created with Tango.us

20. TYPE THE NAME OF THE EVENT YOU WANT TO ATTACH THE CODE TO

Meeting registration

Owner * Fairbanks, Bridget

Meeting

Meeting Setup * 2022

Registration Setup *

Loading...

+ New Event Meeting Setup Advanced lookup

Tango Created with Tango.us

21. IN THIS EXAMPLE WE ARE SELECTING 2022 HBA ANNUAL CONFERENCE

New Promotion Type

General

Product Type *

Owner *

Meeting

Meeting Setup

2022 HBA Ambassador Awards - Europe-based

2022 HBA Ambassador Awards - US-based

2022 HBA Ambassador Awards

2022 HBA Annual Conference

2022 HBA Annual Conference

2022 HBA Canada Circle of Advisors

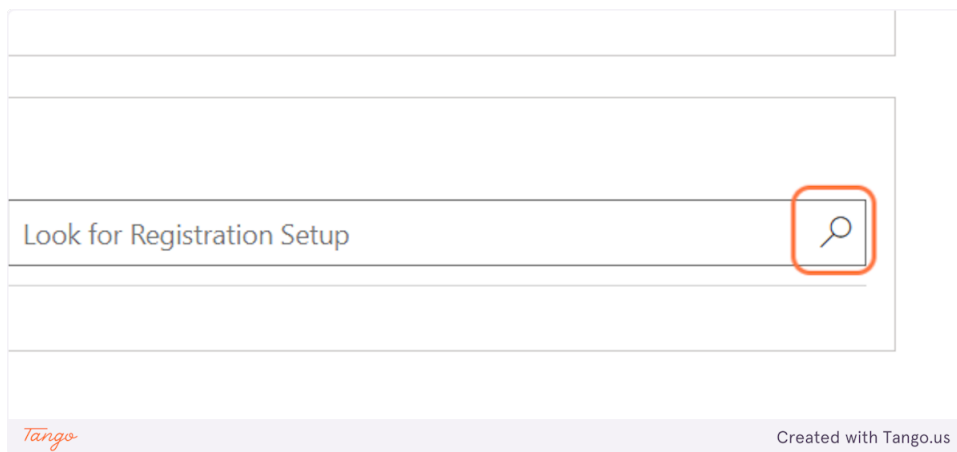
HBA Canada - 2022 Circle of Advisors

2022 HBA Canada Region Mentoring Program

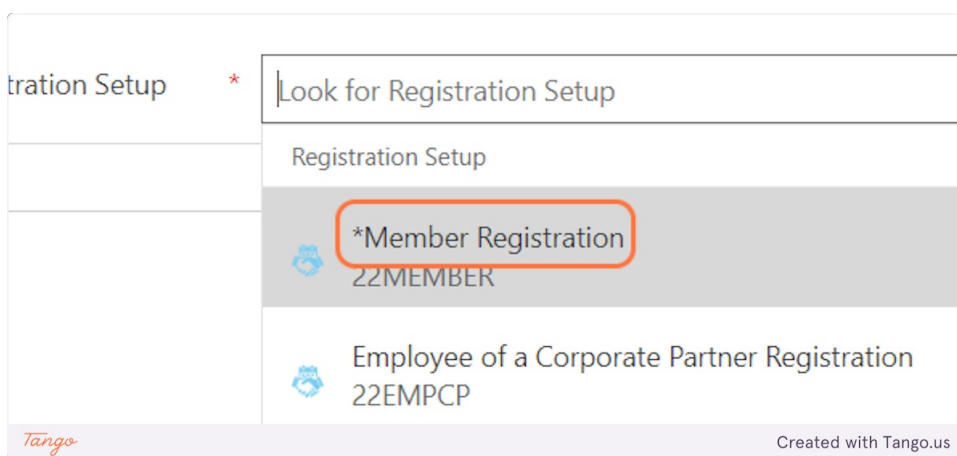
+ New Event Meeting Setup Advanced lookup

Tango Created with Tango.us

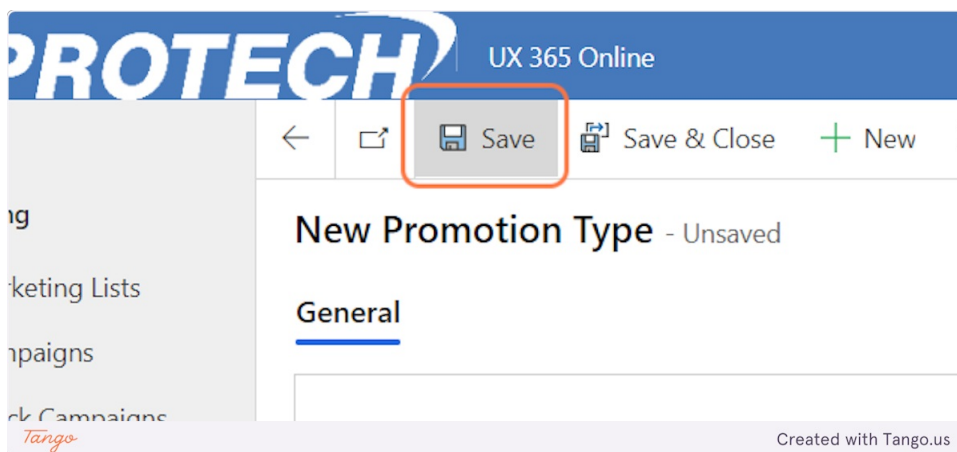
22. CLICK ON SEARCH RECORDS FOR REGISTRATION SETUP, LOOKUP FIELD



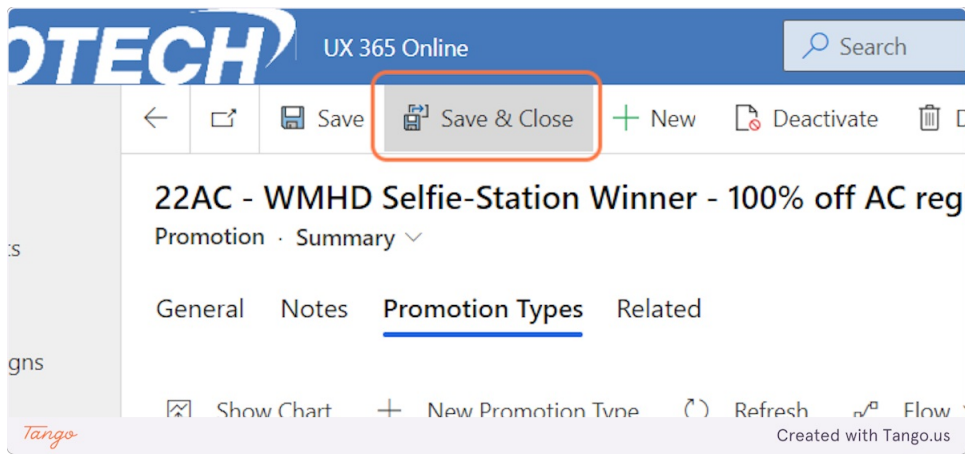
23. CLICK ON *MEMBER REGISTRATION



24. CLICK ON SAVE



25. CLICK ON SAVE & CLOSE



Created with [Tango.us](https://tango.us)