

Invoices - How to check if a promo code was used

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Invoices - How to check if a promo code was used

Creation Date: Aug 11, 2025

Created By: Bridget Fairbanks

1. Click on Contacts

Reports

Easy Print Reports

Registration Ques...

Registration Resp...

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

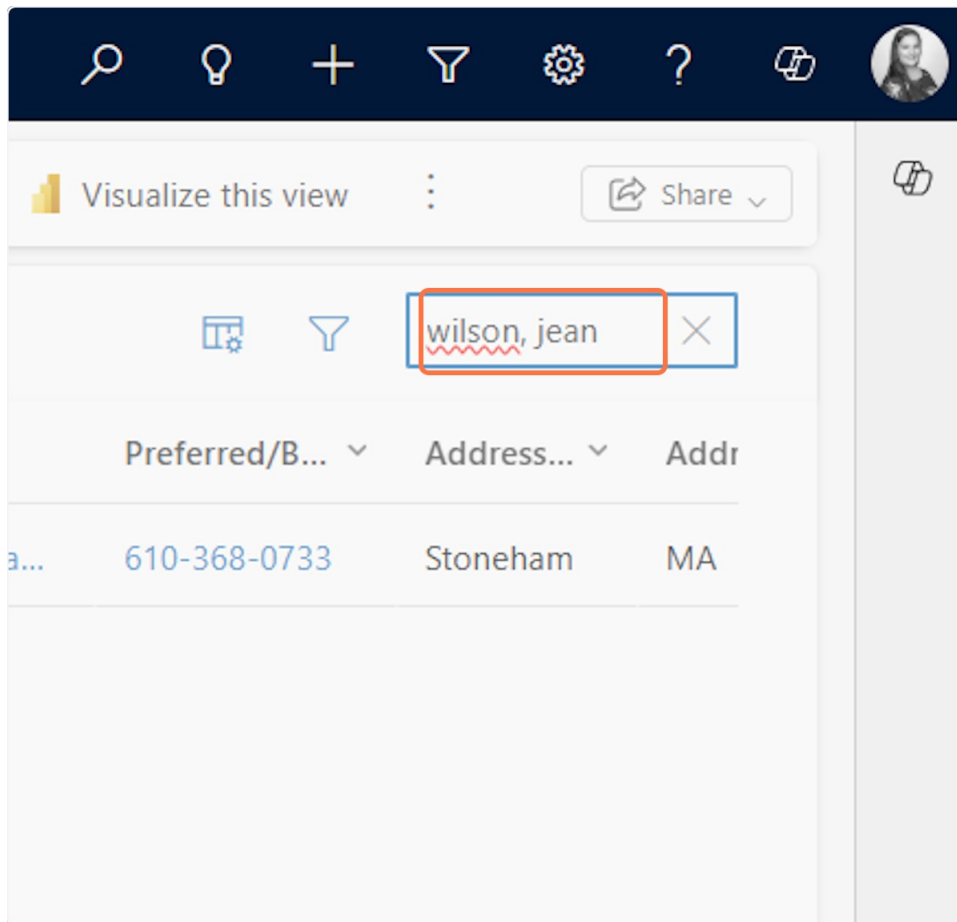
GoTransactions

Leads

Opportunities

| | |
|-----------------------|---------------------|
| - w6betvip.com, ... | 1st Class Solutions |
| & Wheels, SVS Tir... | |
| (Anich) Baker, Ma... | athenahealth |
| (Chow) Weatherly... | Siemens Healthin... |
| (Cincotta) Weiss, ... | Pfizer Inc. |
| (Cook) Wilson, Jul... | Takeda Pharmace... |
| (Galderma), Anna | Galderma SA |
| (Guida) McColley,... | Atlas |
| (Hilton) Murphy, ... | Real Chemistry |
| (Imbriaco) Haas, ... | North Highland |
| (Schen) Alix, Allison | Pfizer Inc. |

2. IN THE SEARCH BAR TYPE THE NAME OR EMAIL OF THE CONTACT




3. DOUBLE CLICK ON THE CONTACT RECORD YOU WANT TO OPEN


The screenshot shows a CRM interface with a table of active contacts. The table has columns for Full Name, Company Name, Contact Number, Member, Email, Preferred/Business, Address 1: City, Address 1: Stat..., and Created On. A red box highlights the first row of data, which corresponds to the contact 'Wilson, Jeanette'.

| Full Name | Company Name | Contact Number | Member | Email | Preferred/Business | Address 1: City | Address 1: Stat... | Created On |
|------------------|-----------------------------|----------------|--------|---------------------|--------------------|-----------------|--------------------|-----------------|
| Wilson, Jeanette | Bristol Myers Squibb | C-20003954 | Yes | jeanette.wilson2... | 6472084115 | Burlington | ON | 01/17/2022 4:14 |
| Wilson, Jeanne | Intellia Therapeutics, Inc. | 10044578 | No | wilsonjeanneb@... | 610-368-0733 | Stoneham | MA | 12/18/2014 4:11 |

4. CLICK ON MORE TABS

+ New

 Address Validation

 Open org chart


| | | | |
|----------------|------------|-----------------|-----|
| C-20003954 | Member | 12/31/2025 | 0.0 |
| Contact Number | Price List | Expiration Date | Eng |

Business Information


Details

...

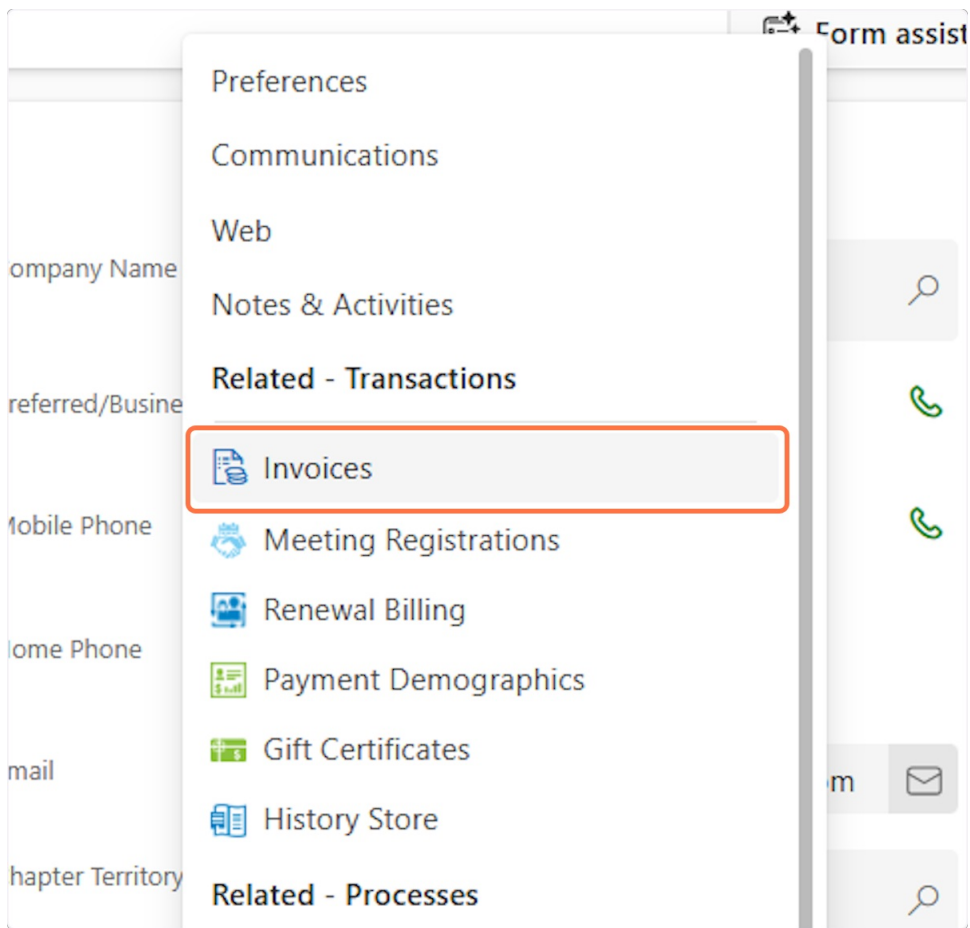
Company Name

 [Bristol Myers](#)

Preferred/Business Phone

 +1 647-20

5. CLICK ON INVOICES



6. CLICK ON INVOICE DATE

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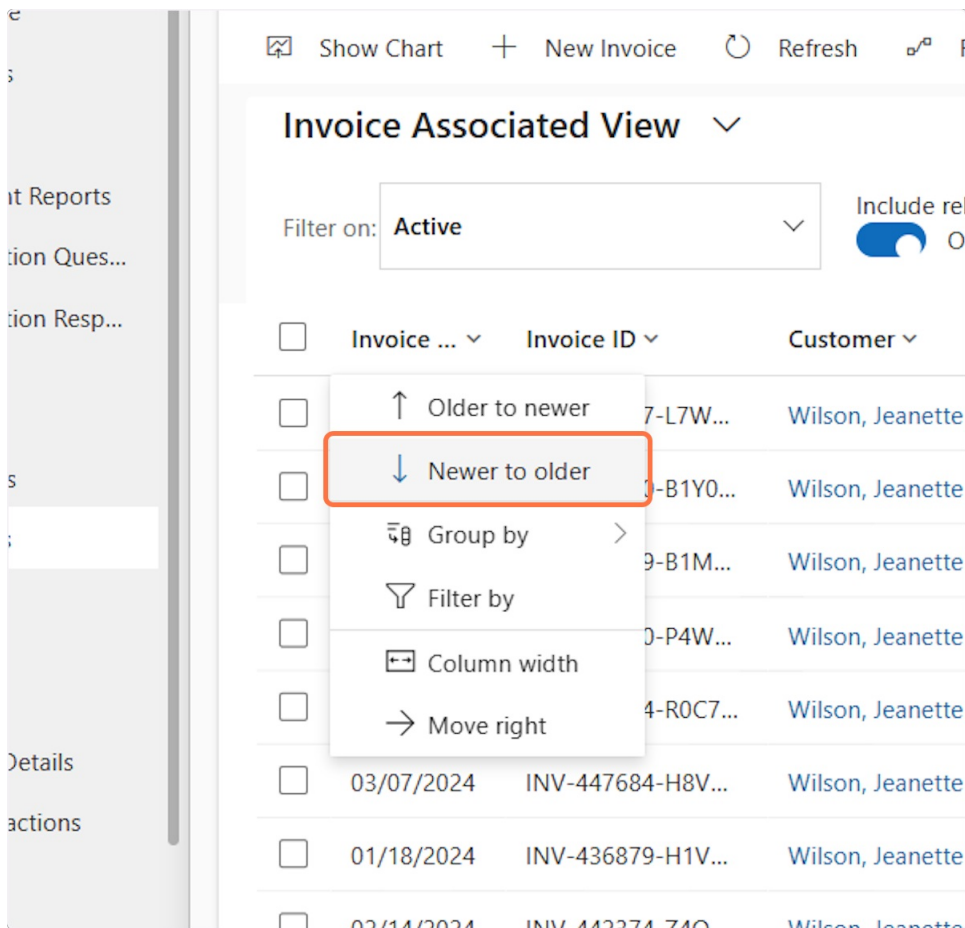
Show Chart + New Invoice ↻ Refre

Invoice Associated View ▾

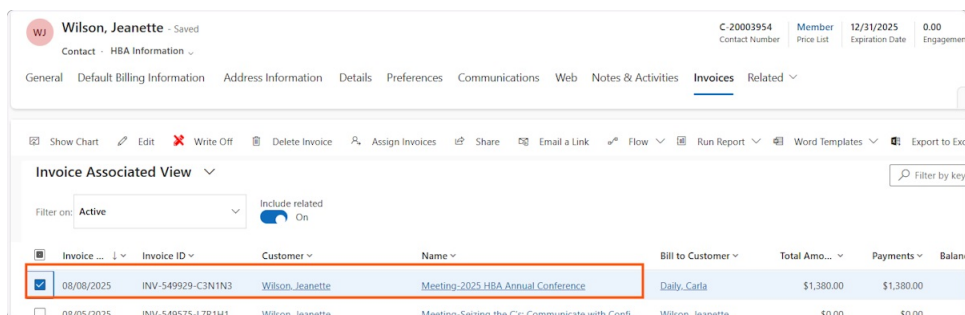
Filter on: Active ▾

| <input type="checkbox"/> | Invoice ... ▾ | Invoice ID ▾ | Cus |
|--------------------------|---------------|--------------------|-----|
| <input type="checkbox"/> | 09/13/2023 | INV-401987-L7W... | Wil |
| <input type="checkbox"/> | 08/08/2023 | INV-397120-B1Y0... | Wil |
| <input type="checkbox"/> | 02/27/2023 | INV-378149-B1M... | Wil |
| <input type="checkbox"/> | 10/01/2024 | INV-475760-P4W... | Wil |
| <input type="checkbox"/> | 07/22/2024 | INV-466734-R0C7... | Wil |

7. CLICK ON NEWER TO OLDER



8. DOUBLE CLICK ON THE INVOICE YOU WANT TO VIEW



9. LOOK IN THE PROMOTION FIELD AND IT WILL TELL YOU WHAT PROMO CODE WAS USED. AND IF YOU LOOK IN THE DISCOUNT FIELD IT WILL TELL YOU HOW MUCH THE DISCOUNT WAS.

Save

Save & Close

Close

Refresh

Check Access

Transfer Participant

Add Sessions

New Guest

Cancel Meeting

Cancel Session

- Employee of a Corporate Partner - Saved

Event Registration - Registration

General

Sessions

Policy Acceptance

Guests

User Defined Fields

Participant Information

Administration

Related

Information

Contact

Wilson, Jeanette

Wait List

No

Meeting

2025 HBA Annual Conference

Registration

- Employee of a Corporate Partner

Survey email sent

No

Exclude from Max Cap

Pricing

Override Price

Date Registered

08/08/2025

Promotion

2025 AC - Connection Circle Facilitators

Price

\$1,875.00

Override Discount

Discount

\$495.00