

# HBA Academy - Adding Promotion to ALL Academy Products

Last Modified on 08/11/2025 12:33 pm EDT

## HBA Academy - Adding a Promotion to ALL Academy Products

**Creation Date:** Aug 11, 2025

**Created By:** Bridget Fairbanks

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The first step in this process is to create your promo code that you want to apply to all HBA Academy Products

### 1. CLICK ON PROMOTIONS

CP Submissions	(Cincotta) Weiss, ...	Pfizer Inc.
RSL Confirmations	(Cook) Wilson, Jul...	Takeda Pharmace...
Additional notes	(Galderma), Anna	Galderma SA
WOTY Table Pre-...	(Guida) McColley,...	Atlas
Event Sponsors	(Hilton) Murphy, ...	Real Chemistry
Tables	(Imbriaco) Haas, ...	North Highland
Web Logins	(Schen) Alix, Allison	Pfizer Inc.
<b>Promotions</b>	(Segner) Bass, Ali...	CSL
Social Activity HL	(Website Chinh T...	Animalgesic Labo...
Event setup forms	(Wesche) Baars, K...	
Communication Si...	., BJ66	BambuAI
New Company Re...	., GO8	Albany Molecular...
CP Exit Surveys		
Event Surveys		
Sponsorship Track...		

## 2. CLICK ON NEW

UX 365 Online	
Focused view	Show Chart
<b>+ New</b>	Delete
Refresh	
e Promotion	
Name	Code
10 Bulk Memberships - INV-461028-Y9Q9R...	2024Organon10
10% for 10+ Memberships	Bulk10
10% TT Summit Code	TTS10!
17 AC: 2016 Comp Winner	AC2017WINCOMP
17 AC: Atlanta leadership discount	AC2017ATLLEAD

3. IN THE NAME FIELD, TYPE THE NAME OF YOUR CODE. IN THIS EXAMPLE WE ARE USING "AC25ACADEMY - 25% OFF"

**ECH** UX 365 Online

← ↻ Save Save & Close + New ⌘ Flow ▾

### New Promotion

Promotion · Information ▾

**General** Notes

Name *	AC25Academy - 25% off	Promotion Code *	
Start Date *	---	End Date *	
Discount Type *	Flat Price ▾	Amount *	
HBA Total Codes Available *	---	Currency *	
HBA Total Codes Used *	---	Owner *	
HBA Code Uses Left *	---		

4. IN THE START DATE FIELD, ENTER THE START DATE FOR THE PROMO CODE TO BE USED. IN THIS EXAMPLE WE ARE USING SEPTEMBER 29, 2025

Discount Type *	September 2025 ↑ ↓	2025																																																
HBA Total Codes Available *	<table> <tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr> <tr><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> <tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr> <tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr> <tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr> <tr><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </table>	Su	Mo	Tu	We	Th	Fr	Sa	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	27	28	29	30	1	2	3	4	<table> <tr><td>Jan</td><td>F</td></tr> <tr><td>May</td><td>J</td></tr> <tr><td>Sep</td><td>C</td></tr> </table>	Jan	F	May	J	Sep	C
Su	Mo	Tu	We	Th	Fr	Sa																																												
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	27																																												
28	29	30	1	2	3	4																																												
Jan	F																																																	
May	J																																																	
Sep	C																																																	
HBA Total Codes Used *																																																		
HBA Code Uses Left *																																																		

**Apply Promotion**

All Products ☐

5. IN THE DISCOUNT TYPE FIELD, SELECT IF IT IS A PERCENT OFF OR FLAT PRICE OFF. IN THIS EXAMPLE WE ARE USING A 25% DISCOUNT SO WE WILL SELECT PERCENT

New Promotion - Unsaved

Promotion · Information

GeneralNotes

Name	*	AC25Academy - 25% off	Promotion Code	*	
Start Date	*	09/29/2025	End Date	*	
Discount Type	*	Flat Price	Amount	*	
HBA Total Codes Available	*	<div> <div>Flat Price</div> <div>Percent</div> </div>	Currency		
HBA Total Codes Used	*	---	Owner	*	
HBA Code Uses Left	*	---			

Apply Promotion

All Products

Membership (10)

Specific Type

Meetings (20)

6. IN THE HBA TOTAL CODES AVAILABLE FIELD TYPE "9999"

New Promotion - Unsaved

Promotion · Information

GeneralNotes

Name	*	AC25Academy - 25% off	Promotion Code	*	
Start Date	*	09/29/2025	End Date	*	
Discount Type	*	Percent	Amount	*	
HBA Total Codes Available	*	999	Currency		
HBA Total Codes Used	*	---	Owner	*	
HBA Code Uses Left	*	---			

Apply Promotion

All Products

Membership (10)

7. IN THE HBA TOTAL CODES USED TYPE "0"

Promotion · Information ▾

**General** Notes

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Name *	AC25Academy - 25% off	Promotion Code *	
Start Date *	09/29/2025	End Date *	
Discount Type *	Percent	Amount *	
HBA Total Codes Available *	9,999	Currency *	
HBA Total Codes Used *	0	Owner *	
HBA Code Uses Left *	---		

**Apply Promotion**

All Products	<input type="checkbox"/>	Membership (10)
Specific Type	<input type="checkbox"/>	Meetings (20)

## 8. IN THE HBA CODE USES LEFT FIELD TYPE "9999"

**General** Notes

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Name *	AC25Academy - 25% off	Promotion Code *	
Start Date *	09/29/2025	End Date *	
Discount Type *	Percent	Amount *	
HBA Total Codes Available *	9,999	Currency *	
HBA Total Codes Used *	0	Owner *	
HBA Code Uses Left *	9999		

**Apply Promotion**

All Products	<input type="checkbox"/>	Membership (10)
Specific Type	<input type="checkbox"/>	Meetings (20)
		Subscriptions (40)

## 9. IN THE PROMOTION CODE FIELD TYPE THE NAME OF THE CODE YOU WANT TO USE. IN THIS EXAMPLE WE ARE USING "AC25ACADEMY"

Form assist

\* AC25Academy

\* ---

\* ---

US Dollar

10. IN THE END DATE FIELD, ENTER THE DAY AFTER YOU WANT THE CODE TO EXPIRE ON. IN THIS EXAMPLE THE CODE WILL EXPIRE ON OCTOBER 15, 2025, SO WE SELECT OCTOBER 16, 2025 AS THE END DATE.

October 2025

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	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	27	28	29	30	31	1

2025

Jan	Feb	Mar
May	Jun	Jul
Sep	Oct	Nov

11. IN THE AMOUNT FIELD TYPE THE PERCENTAGE OFF THAT THE PROMO CODE IS FOR. IN THIS EXAMPLE THE CODE IS FOR 25% OFF SO WE WILL TYPE "25.00"

Form assist

\* AC25Academy

\* 10/16/2025

\* 25.0

US Dollar

Fairbanks, Bridget (Busy)

12. CHECK THE BOX THAT SAYS "SPECIFIC TYPE"

Apply Promotion

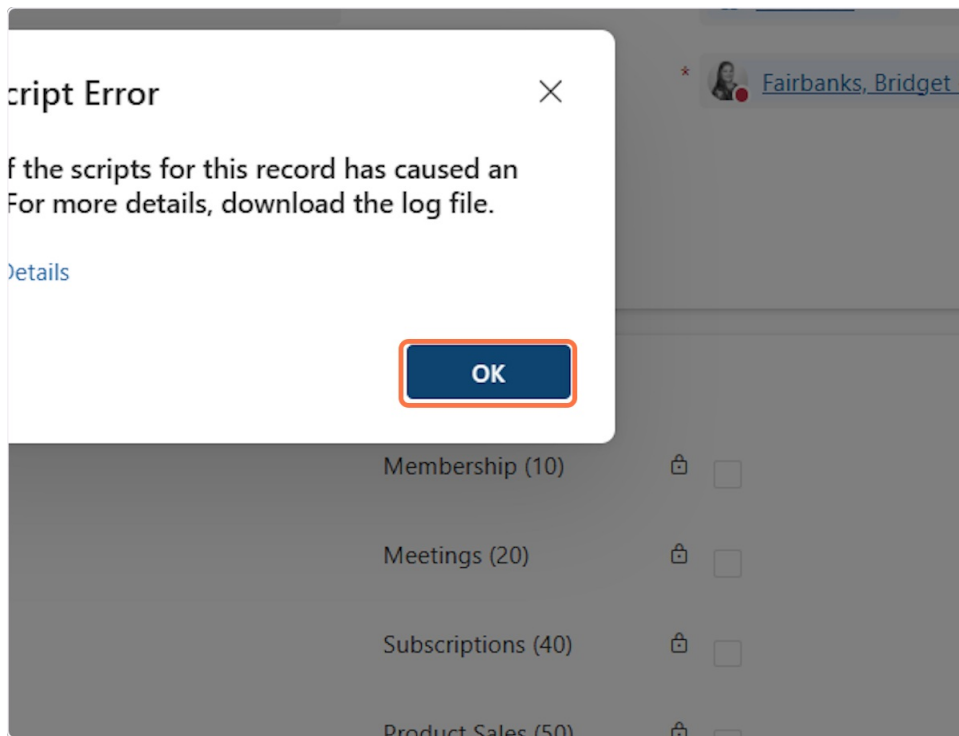
All Products

Specific Type

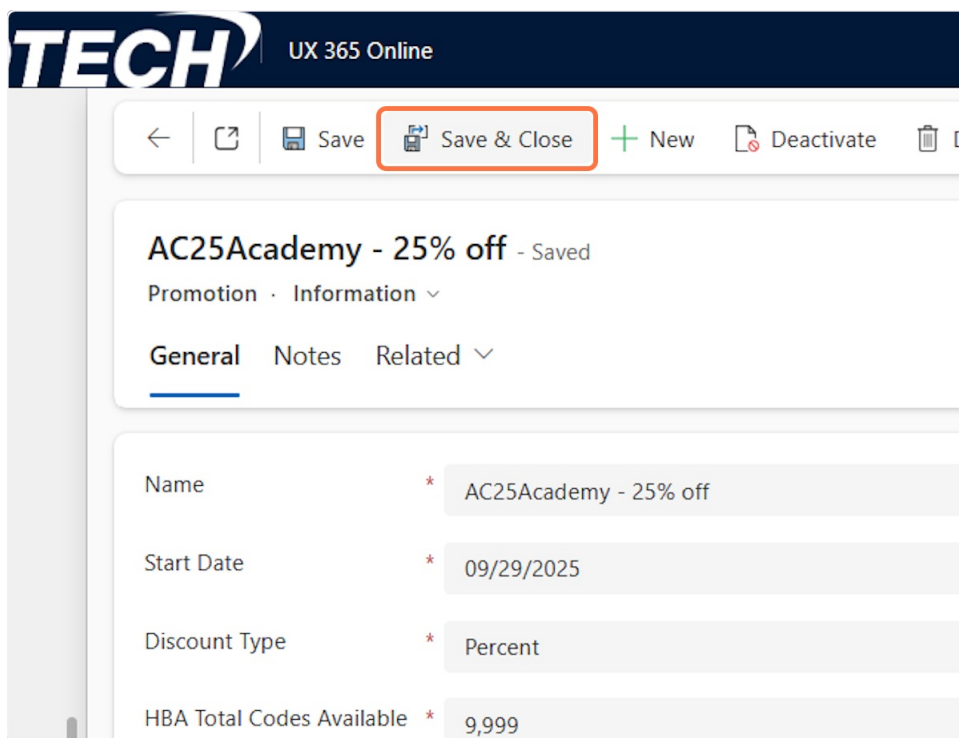
Yes

☒

13. IF AN SCRIPT ERROR BOX APPEARS JUST CLICK OK



#### 14. CLICK ON SAVE & CLOSE

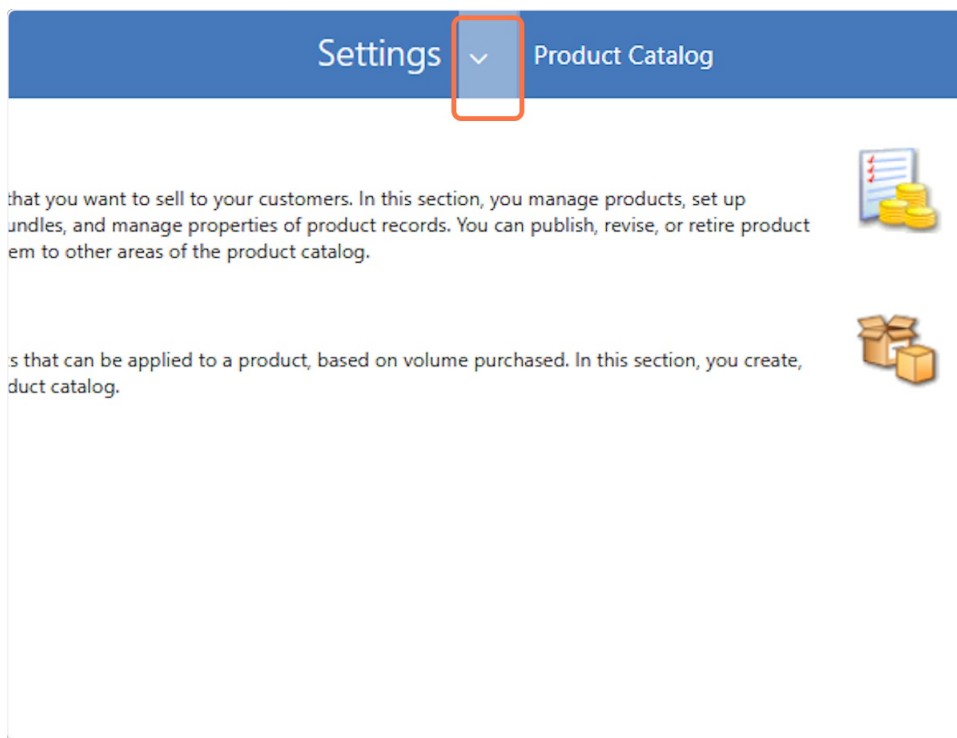


The Second Step is to update the workflow with the promo code you just created.

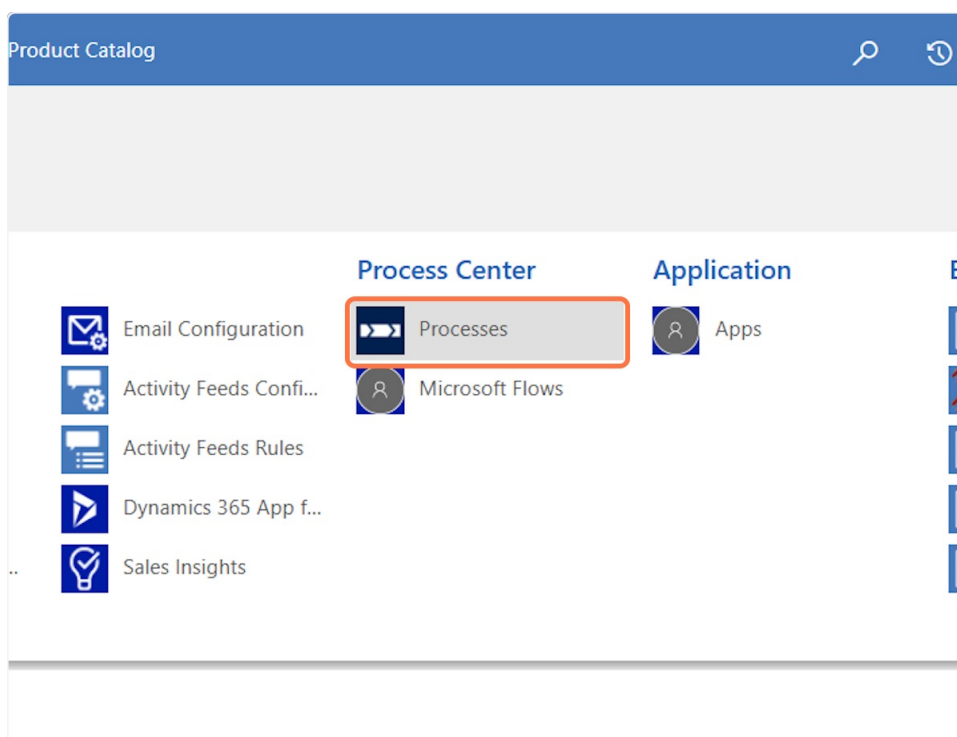
15. OPEN A NEW INTERNET BROWSER AND GO TO: [HTTPS://HBA-UXPROD.CRM.DYNAMICS.COM/MAIN.ASPX?SETTINGSONLY=TRUE#133512455](https://HBA-UXPROD.CRM.DYNAMICS.COM/MAIN.ASPX?SETTINGSONLY=TRUE#133512455)

16. CLICK ON SETTINGS...

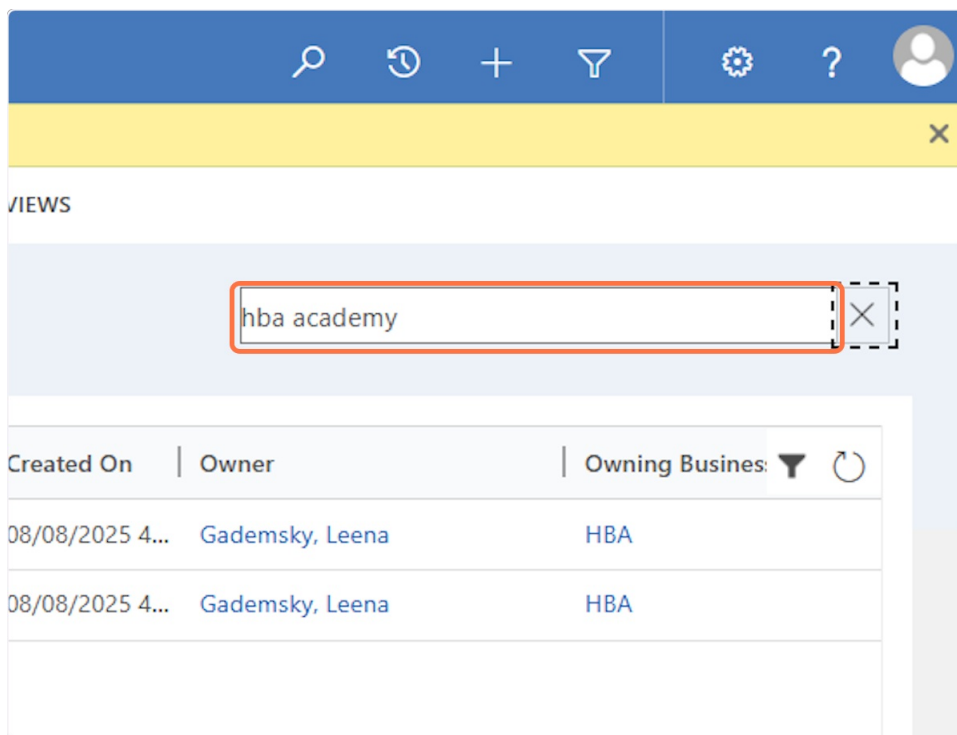




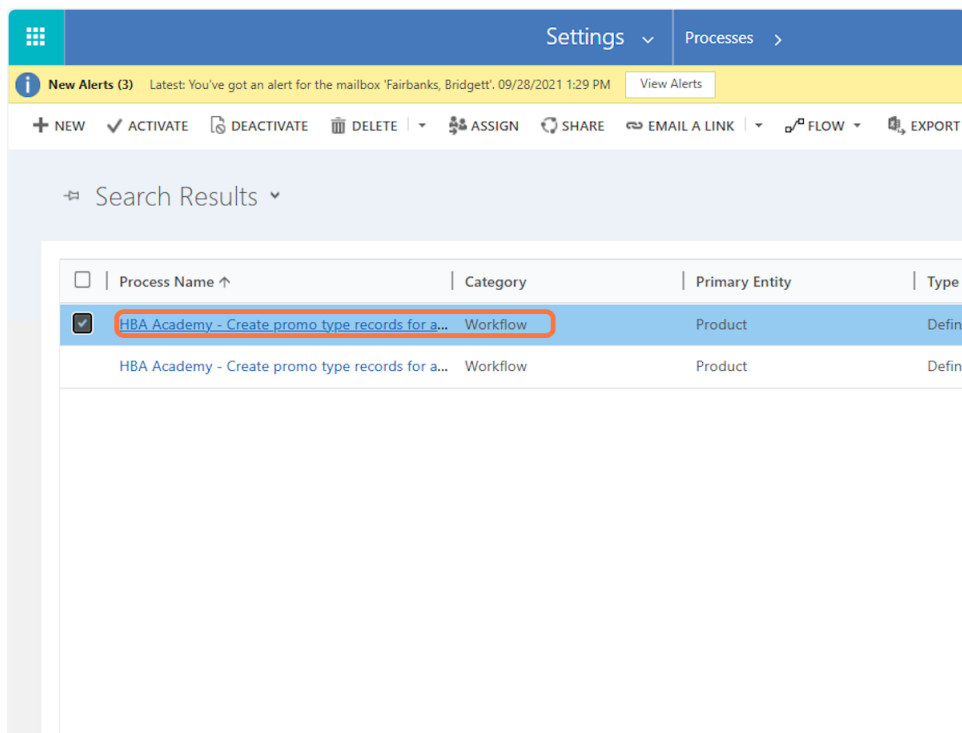
## 17. CLICK ON PROCESSES



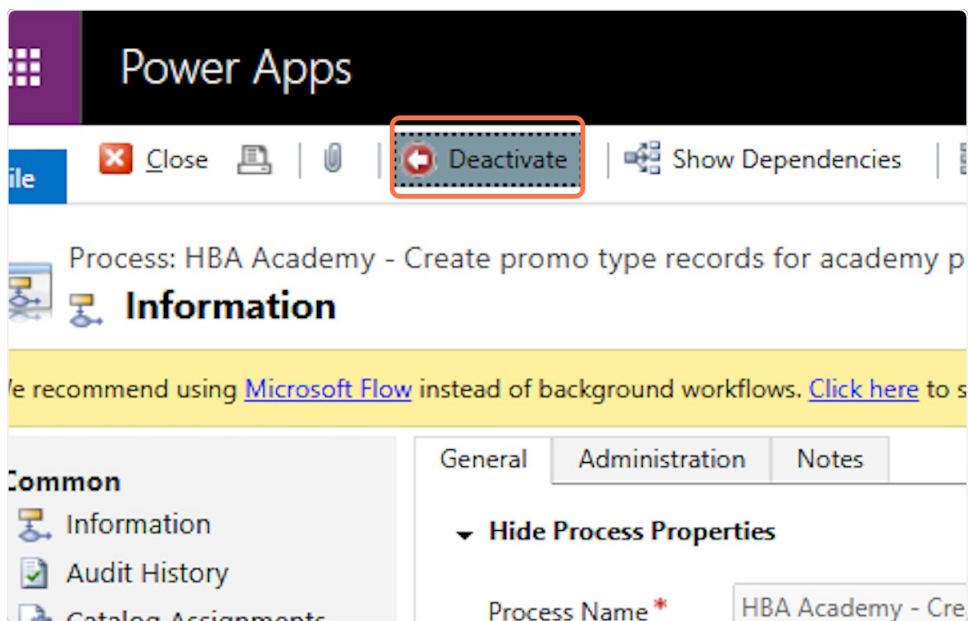
## 18. IN THE SEARCH BAR TYPE "HBA ACADEMY"



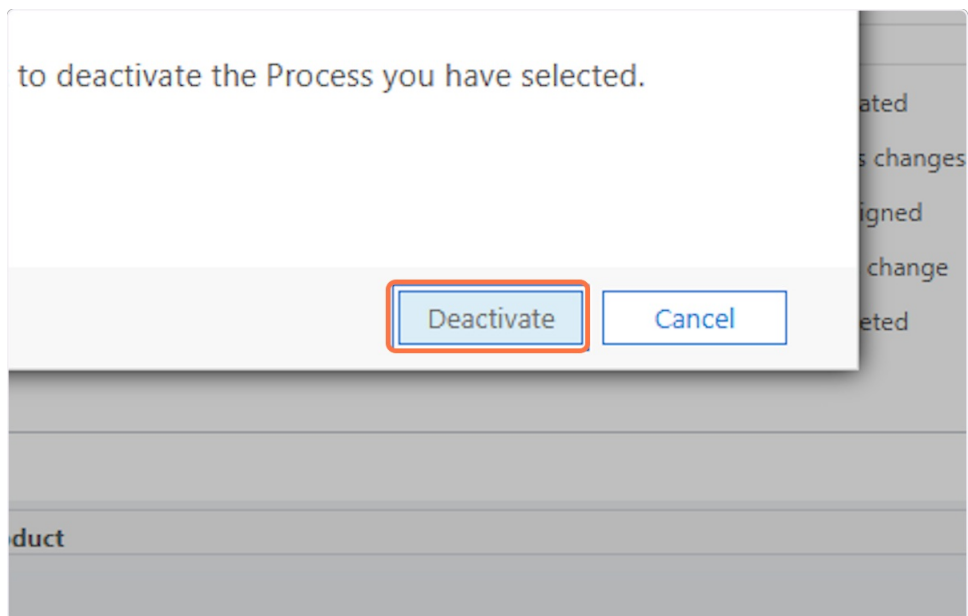
19. DOUBLE CLICK ON THE "HBA ACADEMY - CREATE PROMO TYPE RECORDS FOR ACADEMY PRODUCTS" NOTE: MAKE SURE YOU ARE SELECTING THE ONE THAT SAYS ACTIVATED UNDER THE STATUS COLUMN.



20. CLICK ON DEACTIVATE



21. CLICK ON DEACTIVATE






22. CLICK ON VIEW PROPERTIES

- **Create promotion type for selected product**

Create: Promotion Type [View properties](#)

23. IN THE PROMOTION FIELD, CLICK ON THE SEARCH ICON

	Exhibit Product
	Adv Ad Type
	sting HBA Academy Promo

24. CLICK ON LOOK UP MORE RECORDS

Meeting Setup

Benefit

Exhibit Setup

Advertisement

Adv Publication

Additional Fields

Promotion

Registration Setup ☐

Session Setup ☐

Rate

Exhibit Product

Adv Ad Type

Bridget Testing HBA Academy Promo Codes  
BFTestAcademy Percent

[Look Up More Records](#)

Bridget Testing HBA Academy Promo

25. IN THE SEARCH FIELD TYPE THE PROMO CODE YOU WANT TO ADD. IN THIS EXAMPLE WE ARE USING "AC25ACADEMY"

Create promo type records for academy products

Lookup Record

Enter your search criteria.

Look for

Look in

Search

☐ Show Only My Re

<input type="checkbox"/>	Name ↑	Code	Discount Type
<input checked="" type="checkbox"/>	10 Bulk Memberships ...	2024Organon10	Percent
	10% for 10+ Members...	Bulk10	Percent

26. SELECT THE PROMO CODE AND CLICK ADD

Lookup Record

Enter your search criteria.

Look for

Promotion

Look in

Promotion Lookup View

Search

ac25acad

☐ Show Only My Records

<input type="checkbox"/>	Name ↑	Code	Discount Type	Amc ↻
<input checked="" type="checkbox"/>	AC25Academy - 25% ...	AC25Academy	Percent	\$

1 - 1 of 1 (1 selected)

Page 1

New

Add

Cancel

Remove Value

## 27. CLICK ON SAVE AND CLOSE

File

Save and Close

Process: HBA Academy - Create promo type records for academy pr

Create Promotion Type

General

Product Type \*

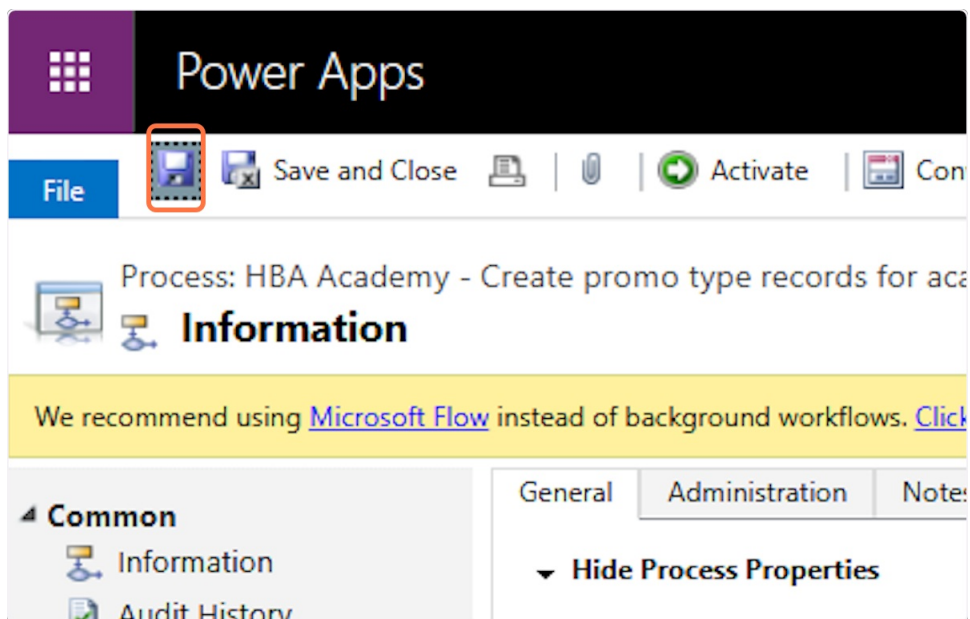
Product Sales

Owner

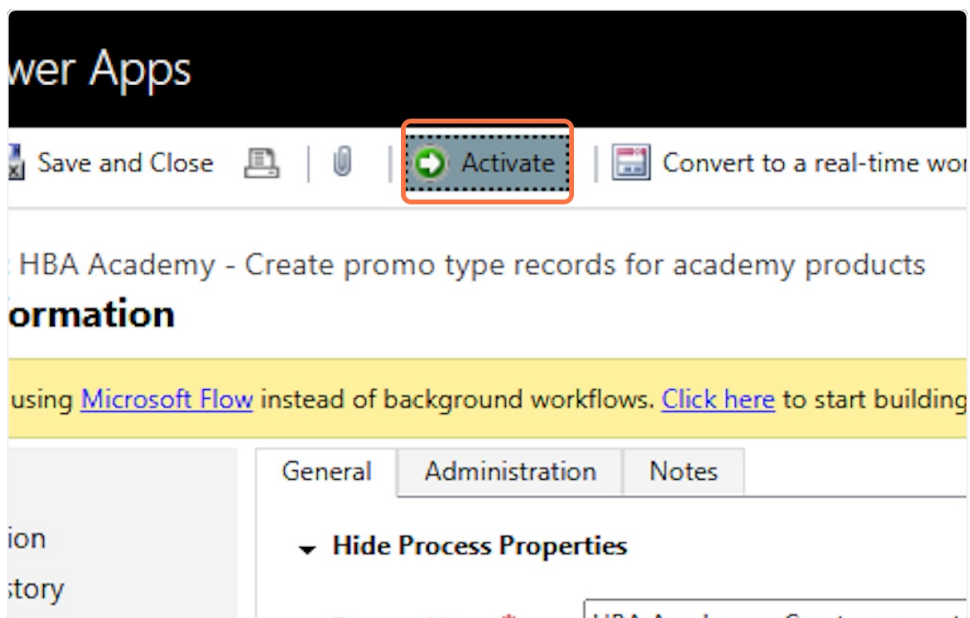
Product

{Product(Product)}

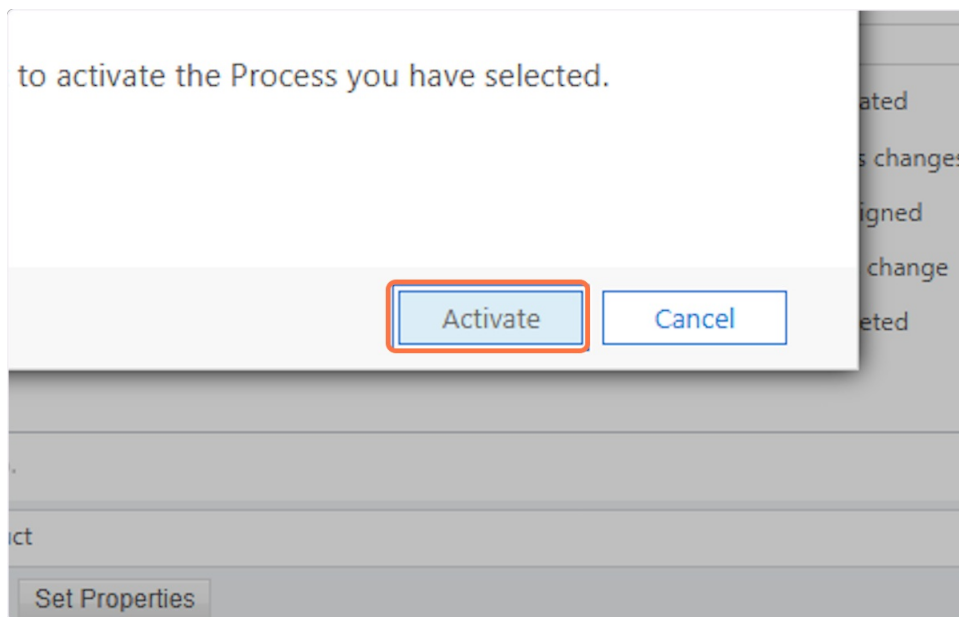
## 28. CLICK ON SAVE



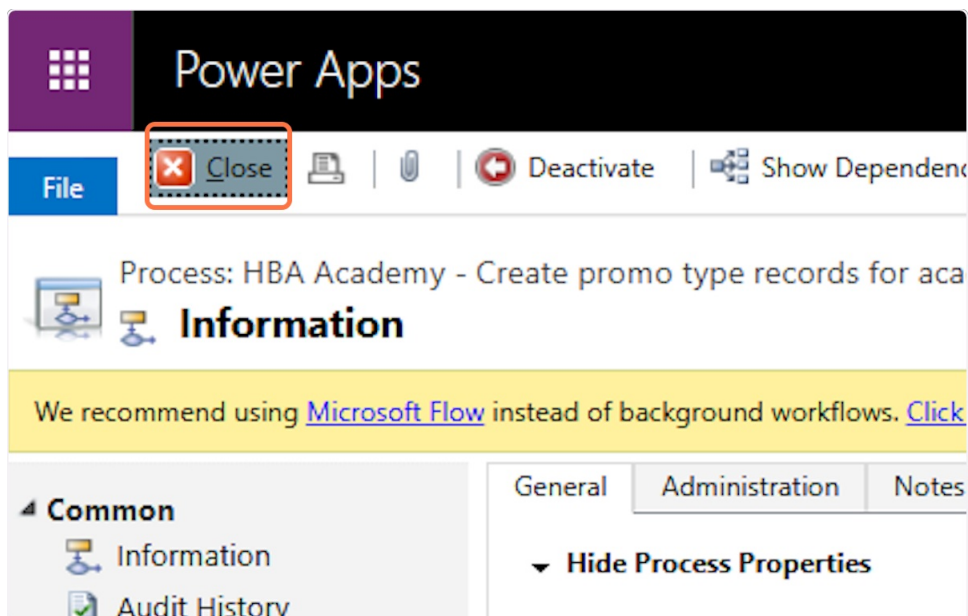
29. CLICK ON ACTIVATE



30. CLICK ON ACTIVATE



31. CLICK ON CLOSE



The Last step is to run the workflow and attach it to all the Academy Products

32. CLICK ON MY WORK



Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

Extensions

Wall Of Recognition

CP Submissions

DSL Configuration

MW My Work

(Guida) McColley, Vi...	Atlas	1537
(Hilton) Murphy, Kris...	Real Chemistry	100940
(Imbriaco) Haas, Alissa	North Highland	100594
(Schen) Alix, Allison	Pfizer Inc.	C-2003
(Segner) Bass, Alison...	CSL	100850
(Website Chinh Thuc ...	Animalgesic Laborat...	C-2007
(Wesche) Baars, Kate (.		100509
., BJ66	BambuAI	C-2007
., GO8	Albany Molecular Re...	C-2007

All

#

A

B

C

D

E

F

G

H

1 - 250 of 5000+

### 33. CLICK ON PRODUCT SALES

Sales

Invoices

Change area

My Work

Renewal

Meetings

Member Groups

Product Sales

Exhibits

Advertisement

Education

Fundraising

Financial Manager

Settings

(Galderma), Anna	Galderma SA	C-2001
(Guida) McColley, Vi...	Atlas	153743
(Hilton) Murphy, Kris...	Real Chemistry	100940
(Imbriaco) Haas, Alissa	North Highland	100594
(Schen) Alix, Allison	Pfizer Inc.	C-2003
(Segner) Bass, Alison...	CSL	100850
(Website Chinh Thuc ...	Animalgesic Laborat...	C-2007
(Wesche) Baars, Kate (.		100509
., BJ66	BambuAI	C-2007
., GO8	Albany Molecular Re...	C-2007

All

#

A

B

C

D

E

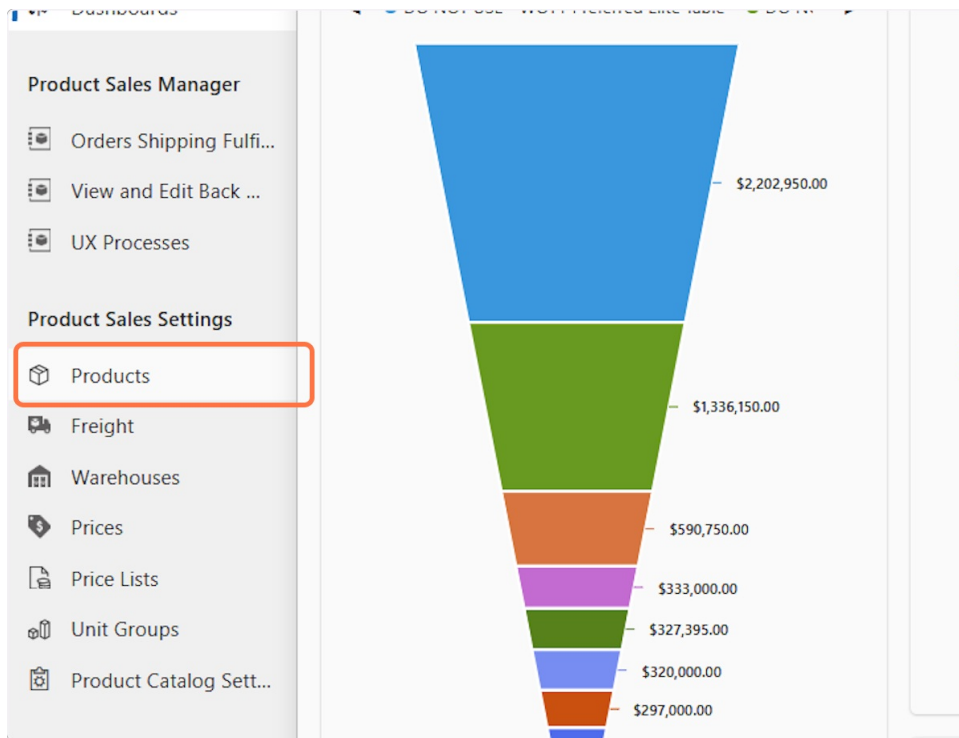
F

G

H

1 - 250 of 5000+

### 34. CLICK ON PRODUCTS



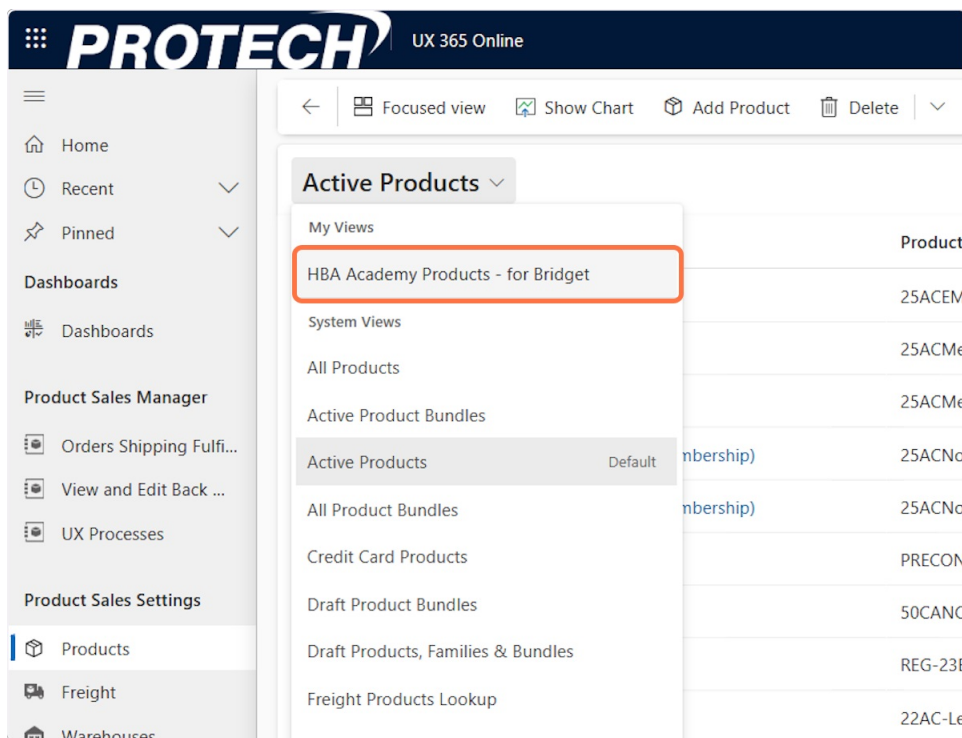
### 35. CLICK ON ACTIVE PRODUCTS

PROTECH UX 365 Online

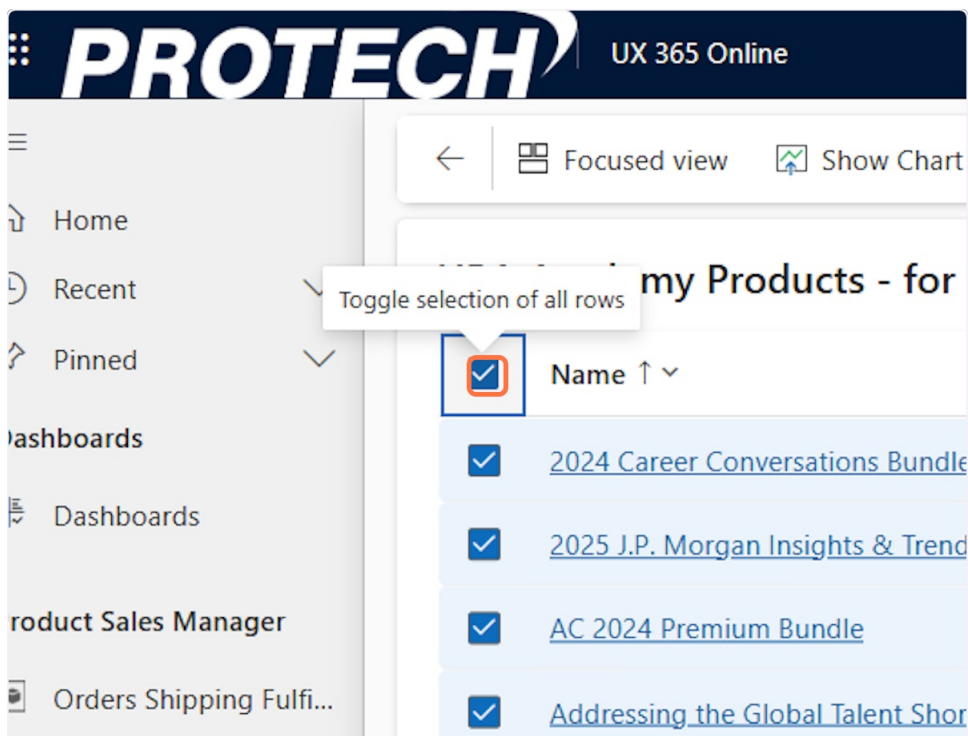
Active Products

<input type="checkbox"/>	Name ↑ ↓
<input type="checkbox"/>	- Employee of a Corporate Partner
<input type="checkbox"/>	- Member
<input type="checkbox"/>	- Member
<input type="checkbox"/>	- Nonmember (includes 1 year HBA membership)
<input type="checkbox"/>	- Nonmember (includes 1 year HBA membership)
<input type="checkbox"/>	\$25 Administrative Cancellation Fee
<input type="checkbox"/>	\$50 admin fee for cancellations

### 36. CLICK ON HBA ACADEMY PRODUCTS - FOR BRIDGET



37. CLICK ON THE CHECK BOX TO SELECT ALL THE ACADEMY PRODUCTS



38. CLICK ON FLOW

ete	▼	Email a Link	▼	Flow ▼	Run Report ▼	Export to
▼					Edit columns	
	Product ID ▼	Product Type ▼	Company ▼			
Interactive Dive into...	H25I0M0205	Sales Non Inventory	<a href="#">Healthcare</a>			
es	H24I0M0171	Sales Non Inventory	<a href="#">Healthcare</a>			
ques	H24I0M0173	Sales Non Inventory	<a href="#">Healthcare</a>			
	H24I0M0100	Sales Non Inventory	<a href="#">Healthcare</a>			
	H25I0M0183	Sales Non Inventory	<a href="#">Healthcare</a>			

### 39. CLICK ON HBA ACADEMY - CREATE PROMO TYPE RECORDS FOR ACADEMY PRODUCTS

▼	Product ID ▼	Product Type ▼	Company ▼	Ca
Interactive Dive into...	H25I0M0205		<a href="#">Healthcare Businesswomen'...</a>	No
es	H24I0M0171		<a href="#">Healthcare Businesswomen'...</a>	No
es	H24I0M0173		<a href="#">Healthcare Businesswomen'...</a>	No
	H24I0M0100		<a href="#">Healthcare Businesswomen'...</a>	No
	H25I0M0183		<a href="#">Healthcare Businesswomen'...</a>	No
	H24I0M0083	Sales Non Inventory	<a href="#">Healthcare Businesswomen'...</a>	No
	H24I0M0101	Sales Non Inventory	<a href="#">Healthcare Businesswomen'...</a>	No
epeneurial Pote...	H24I0M0135	Sales Non Inventory	<a href="#">Healthcare Businesswomen'...</a>	No
h Innovation (A...	H24I0M0098	Sales Non Inventory	<a href="#">Healthcare Businesswomen'...</a>	No
undle Pack (202...	H24B0M0114	Sales Non Inventory	<a href="#">Healthcare Businesswomen'...</a>	No

Manage

- Create a flow
- See your flows
- Run
- Dimension
- Staff new - Update LMS pr...
- Run Workflow
- Update AR GL account
- HBA Academy - Create pro...
- DO NOT USE - Staff - upda...

### 40. CLICK ON OK

Confirm Application of Workflow

✕

This workflow will be applied to 132 Products.

You can monitor workflow jobs by opening each Product and clicking Workflows. Are you sure that you want to continue?

OK

Cancel

Performance Review	H24I0M0136	Sales Non Inventory
g Inequities in Women's H...	H24B0M0172	Sales Non Inventory
undle (HBA Academy)	H24B0M0113	Sales Non Inventory
Associations in Closing the...	H25I0M0202	Sales Non Inventory