Promo Codes Screen

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Promo codes are configured in Setup / Product Catalog / Package / Promo Codes

Overview

Promo Codes are used to define promotional pricing that can later be applied to services through package frequency discount configuration. A promo code can contain one or more discounts, and those discounts can be configured separately by currency.

This allows a promotion to support scenarios such as a free introductory period, a percentage discount for a limited time, or a replacement promotional price. Multiple discount rows can be configured and ordered so they apply in sequence over time.

Promo codes are intended to be reusable. Once a promo code is in use, its configuration is restricted so the promotion history on already-applied services stays consistent.

Promo Code Application

- Promo code discounts are applied after other applicable discounts.
- A promo code can only be added to an account service before billing has occurred for that service.
- Multiple promo codes can apply to a service, but the same promo code cannot be applied more than once to the same service.

Prerequisites

Promo codes can be configured immediately. There are no prerequisite configuration steps for this screen.

Promo Codes Panel

The Promo Codes panel on the left displays the promo codes that already exist in the system. Select a promo code to load its details in the edit panel on the right.

Each row shows the promo code name and whether it is currently **Active** or **Inactive**. Promo Codes panel to the right. Actions are also available in this panel which are shown as icons above the Filter text box. The available actions are described below.

Actions

Icon	Description
	Deletes the selected promo code (if not in use)
	Adds a new promo code

Edit Promo Code Panel

The panel on the right displays the selected promo code and is where you maintain its configuration.

Main Fields

- **Name**: The unique name of the promo code.
- **Active**: Controls whether the promo code is available for use in service discount configuration. This cannot be enabled until at least one valid discount has been configured.
- **Allow Credit**: Allows the promotion to create a credit-style outcome where the discount can reduce the amount below zero when supported by the selected discount type.
- **Start Date**: The date when the promo code becomes valid.
- **End Date**: The date when the promo code stops being available for new use. This field can still be extended later when a promo code is already in use.
- **Description**: An optional description of the promotion.
- **Prorate**: Controls whether the promotional discount should be prorated where proration behavior applies.

Discounts Tab

The **Discounts** tab is used to configure the discount sequence for each currency.

Currency Buttons

The currency buttons at the top of the tab are used to:

- select the currency you want to configure
- activate or deactivate the promo code for that currency

Discount List

The discount list shows the configured discount rows for the selected currency.

Each discount row includes:

- **Discount Type**: The type of discount, such as fixed, percent, or price.
- **Frequency**: The duration value for the discount period.
- **Unit**: The duration unit for the discount period, such as day, week, month, or year.
- **Amount**: The discount amount, percentage, or replacement price, depending on the selected discount type.

Discount Actions

Within the **Discounts** tab, you can:

- add a new discount row
- remove a discount row
- move discount rows up or down
- drag and drop discount rows to change their order

The order of the rows determines the order in which the promo code discounts are applied over time.

Guides

Adding Promo Codes

To add a promo code:

1. In the **Promo Codes** panel, click **Add**.
2. Enter the **Name**.
3. Set **Start Date**, **End Date**, **Description**, **Allow Credit**, and **Prorate** as needed.
4. Open the **Discounts** tab.
5. Activate the currencies you want to configure.
6. Select a currency.
7. Add one or more discount rows by setting the **Discount Type**, **Frequency**, **Unit**, and **Amount**.
8. Reorder the discount rows if needed.
9. Enable **Active** when the promo code is ready for use.
10. Save the promo code.

Editing Promo Codes

Promo codes that are already in use have limited editability. In practice, the **End Date** can still be extended, but other parts of the promotion should be treated as fixed once they are in use.

To edit a promo code:

1. Select the promo code in the **Promo Codes** panel.
2. Update the allowed promo code details.
3. Review the **Discounts** tab if the promo code is not yet in use.
4. Save the changes.

Deleting Promo Codes

Note: Promo codes cannot be deleted once they are in use. If you need to ensure a promo code is no longer used (able to be added to services going forward) then select the promo code and uncheck the ‘Active’ option.

To delete a promo code:

1. Select the promo code in the **Promo Codes** panel.
2. Click **Delete**.
3. Confirm the deletion when prompted.