Coupons

## **What are coupons?**

Coupons give the customer a discount off their Registration, Product, FlexCare enrollment, Membership.

Coupons should be used as a promotional offering rather than a permanent solution to setting up a second discount. They are applied during the process of enrollment and cannot be added manually to the account after the fact without refunding and re-enrolling.

## **Where you will find coupons?**

Coupons can be found under Administration> Financial Settings> Coupons

## How to set a coupon up?

1. Go to **Administrations> Financial Settings> Coupons**
2. **Add New**
3. Enter **Coupon Title, Code, Description** and other applicable information under **What** section
4. Enter in valid dates of use under **When** information
5. Enter in applicable information under **How Many**
6. Enter in information under **Qualifying Activities** (what the coupon can be used on), **Qualifying Products, Qualifying Memberships, Qualifying Daycare, Qualifying Customers** and **Companies**

## **Why it behaves the way it does?**

* The coupon can be set up to take off a fixed dollar amount or percentage. It can be set up to apply to specific activities, memberships, daycare and products.
* If a coupon code is set up, the customer can enter that code in their online shopping cart so that they have the ease of registering online and still receive their discount.
* Coupons can be set up to record free merchandise.

## **Reports showing coupons**

**Reports> Financial Reports> Coupon Usage** - this gives you a report showing the coupon usage along with the date used, coupon code, type, GL Account, Module coupon was used in, Customer name, System user, Discount Amount

### Customer visibility of coupons

The view coupon link is always there, both on the staff by default and on the online by choice (under **Administration Home » System Settings » Configuration – Online > My Account Configuration > Other Services > View Coupons**) to show.

If you are creating individual coupons then you would need to notify them (or activate the option to show it under **Administration Home » Financial Settings » Configuration > Show Valid Customer Coupons During: Staff enrollment / Public enrollmen**t), but if you are creating a batch using a custom list or custom list based on a previously registered activity then you can have the system email them the notification.

The notification will be as follows:

Here are the coupon(s) set up for you.

Coupon Name |Coupon Code |Number of Uses Remaining |Expiration Date

New |A2Z |1 |Permanent

## FAQ’s

### Coupons can be created in 2 different ways, though I am still unclear on the big differences between the two beyond the assigning/creation of coupon codes. Both seem to be applicable to specific courses and/or people and/or semesters. Both can be controlled in terms of number of coupons, how many uses per coupon, and when they can be redeemed. Creating a batch will assign an individual code to each coupon available. Creating a single coupon will use the same code for all people. So this route would be good if we were going to open it up to a pool of unspecified people.

A) You are correct in saying there isn’t much difference, except the ease of creation a huge number of individual coupons based on a custom list under coupon batches

### If the coupon is attached to a particular class, it will always populate during enrollment, regardless of whether someone is eligible or not. It will also populate even if all coupons have been redeemed already. We would need to think through questions that will come up in advance and how to handle that. It might be best to go the route of assigning it to specific people to prevent a multitude of questions.

A) You can create an activity specific coupon and then mail the people who need to get the coupons. You can change a setting under financial settings > configuration to not show default coupons attached to activities and then only people who have the coupon can utilize it.

### When setting up the coupons, they system asks me to select a charge from the drop down list. Is this necessary? Do I need to create some kind of coupon specific charge?

A) It would work in your favour to have a specific charge and GL account attached to this charge for reporting purposes.

### Do new coupons need to be created for every semester? Would this be best for reporting purposes?

A) Yes it is advisable to refresh coupons every semester for reporting purposes and better tracking.