

# Promo codes on Checkout Forms

Last modified on: 04/11/2025 1:22 pm MST

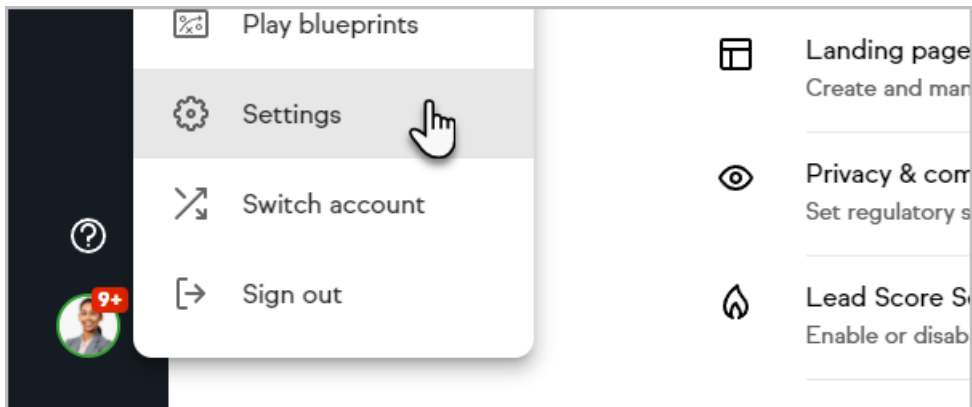
Tags: Keap-Max

Give your customers an additional reason to buy with a discount promo code to use on Keap's checkout forms. Promo codes allow you to create exclusive discounts that you can share with specific leads or specific stages in your buyers' journey.

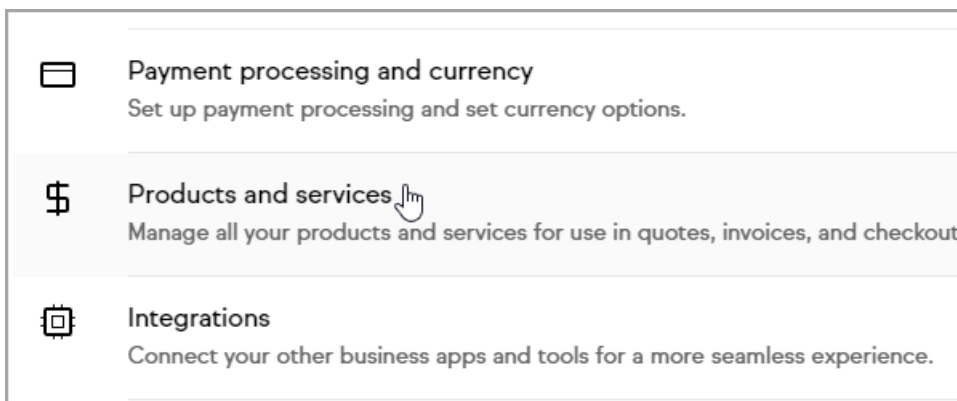
As an additional benefit, you can see reporting as to which promo codes bring you the most business. Track which marketing initiative works best or even track referrals or affiliates with specific promo codes they can share.

## Create a promo code

1. Click on your avatar and select **Settings**



2. Select **Products and services**



3. Click **Promo Code** from the Add dropdown button





4. **Name** your promo code
5. Set your promo code to **Active**
6. Add a **description**



A screenshot of a form for creating a promo code. It consists of three main sections. The first section is a text input field labeled 'Promo code name\*' containing the text '20offfall2021'. The second section is a dropdown menu labeled 'Status' with 'Active' selected. The third section is a text area labeled 'Description' containing the text: 'This promo code gives 20% off an order. We are using it to give leads a discount during the fall of 2021.'

7. **Choose** to give a flat amount discount or discount a percentage for the order



A screenshot of a form for selecting a promo code type and value. The heading reads 'Select a type and promo code value for this promo code'. Below this are two radio buttons: 'Percentage' (which is selected) and 'Amount'. Below the radio buttons is a text input field labeled 'Promo code value\*' containing the number '20'. To the right of the input field is a small square button with up and down arrows, and a percentage sign '%'.

8. (Optional) Set a **time frame** that the promo code is valid for


 **Set active dates**   
Set specific dates and times for your promo code to be active.

Start date   at Start time  


Set an end date

End date   at End time  

9. Review your promo code and **click Save**


 Your promo code summary:

**20offfall2021 ( 20% off)**  
• Valid between Sep 22, 2021 12:00 AM and Dec 21, 2021 11:59 PM






## Allow promo codes for a checkout form

1. Navigate to **checkout forms**
2. **Edit or create** a checkout form
3. In the "Setup" step, toggle promo codes on

**Promo Codes** [How it works](#) 

Let your clients use one of your active promo codes for special deals and discounts.

 earlybird30 (20%)  25referral (\$25.00)  20offfall202... (20%)

[+ Add promo code](#)

4. (optional) If you do not have any promo codes set up or want to create a new one, click Add promo code to quickly create one

✕ Add promo code

*i* This promo code can be used in all your checkout forms.

50customerloyalty

Select a type and value for this promo code

Percentage  Amount


Promo value (%)\*

50


Save promo code Cancel

Card number\*

5. Share your promo code with a link to your checkout form to entice customers to buy now

 **\$80.00** [Close details](#)


Golf Lesson	\$100.00
<hr/>	
20offfall2021 (20% discount) ×	-\$20.00
<b>Total due</b>	<b>\$80.00</b>



**The Nineteenth Hole**  
Getting You Back on Par

## Schedule your first golf lesson

Choose payment method

Credit card   PayPal

Email\*  
mercedes.byfield@infusionhole.com


Name on card\*  
Mercedes Byfield

Card number\*      Expiration\*      CVV\*  
4111111111111111      01/22      454

Country\*  
United States ▼

Postal code\*  
85142

**20% discount applied!**

 **Pay \$80.00 now**

## Promo code reporting

1. Navigate to **Products and services** from Settings
2. Click Promo codes to **view your codes** and how many times they have been used

← Promo codes

Products Taxes Promo Codes

Create and manage promo codes that can be applied by your customers at the time of purchase.

🔍 Search promo codes

Name	Description	Status	Total used	
50customerloyalty	Give customer you haven't seen for a while a reason to come back with 50% off.	Active	0	⋮
earlybird30	Give 30% off for customers who register for the Torrey Pines Golf Tournament and Fundraiser	Active	1	⋮
25referral	Give customers a promo code for \$25 off to share with friends and family	Active	0	⋮

3. Click the ⋮ icon and select **Performance**

earlybird30	register for the Torrey Pines Golf Tournament and Fundraiser	Active	1	⋮
25referral	Give customers a promo code for \$25 off to share with friends and family			
20offfall2021	This promo code gives 20% off an order. We are using it to give leads a discount during the fall of	Active	3	⋮

↩ Performance

✎ Edit

🗑 Delete

4. Review past promo code uses and filter by customer, amount, or purchase date

Search Contacts NEW

× Performance of 20offfall2021

Total used

3

Total sale amount

\$240.00

**Usage details**

Since 10/07/2021

Invoice ID	Customer	Purchase Date	Amount paid
<a href="#">110</a>	Rozella Fryer	10/07/2021	\$80.00
<a href="#">106</a>	Mercedes Byfield	10/07/2021	\$80.00
<a href="#">102</a>	Ashley Tapp	10/07/2021	\$80.00

## FAQ

### How will promo codes work with recurring products and services?

Promo codes will apply to the first payment of the recurring product. Subsequent payments will be at full price.

### How many promo codes can my customers apply?

One promo code can be applied at a time.

### How are sales taxes calculated when a promo code is applied?

Sales taxes are calculated based on the net total of the invoice. If a promo code is applied, the sales taxes are calculated using the discounted total.

### How do I enable promo codes on a checkout form?

In the "setup" step of your checkout form, toggle the promo code on to have the promo code field available for use on your checkout form. If you toggle the promo code field off, your customers will not be able to enter a promo code on that checkout form

### How do the active dates on promo codes work?

If you do not use the active dates option, your promo code will remain active indefinitely

### How do I track how my promo code is doing?

In settings > products and services > promo codes, you'll be able to track how many times a certain code

was used and how much in sales you've generated by customers who used that code at checkout.

**What does making a code inactive do?**

If you make a promo code inactive, that promo code will no longer discount any products or services. It's recommended to make a code inactive vs. deleting your code so that you can still view the performance of that code in the future.

---