# **Promo codes on Checkout Forms**

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Tags: Keap-Max

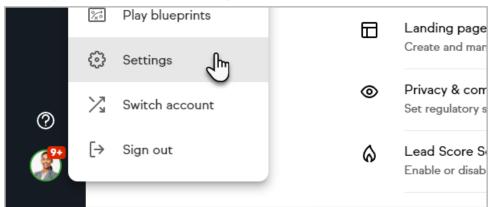
Give your customers an additional reason to buy with a discount promo code to use on Keap's checkout forms. Promo codes allow you to create exclusive discounts that you can share with specific leads or specific stages in your buyers' journey.

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.

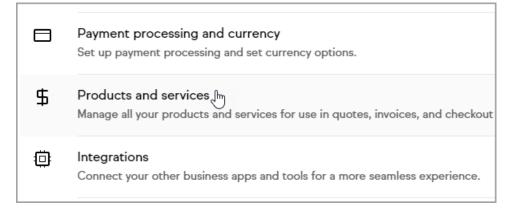
- 1. Create a promo code
- 2. Allow promo codes for a checkout form
- 3. Promo code reporting
- 4. FAQ

## Create a promo code

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



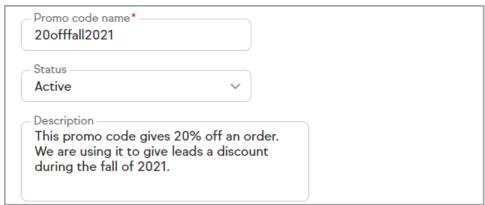
#### 2. Select Products and services



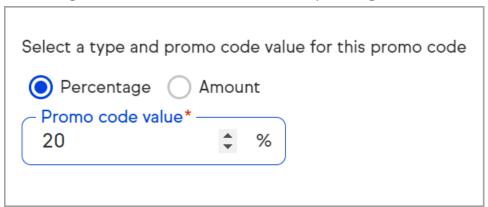
3. Click **Promo Code** from the Add dropdown button



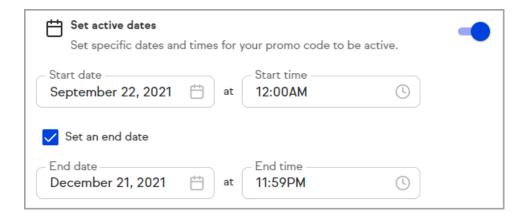
- 4. **Name** your promo code
- 5. Set your promo code to **Active**
- 6. Add a description



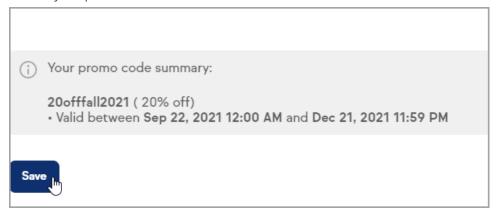
7. **Choose** to give a flat amount discount or discount a percentage for the order



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

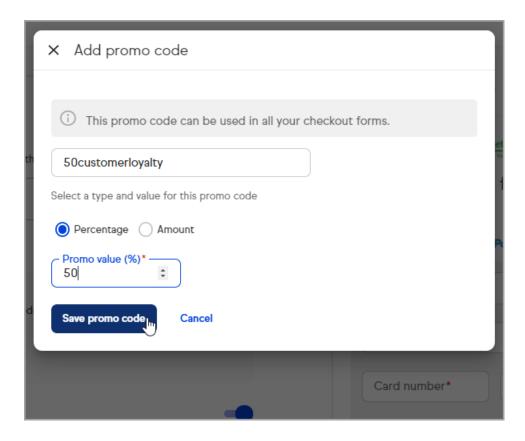


9. Review your promo code and click Save

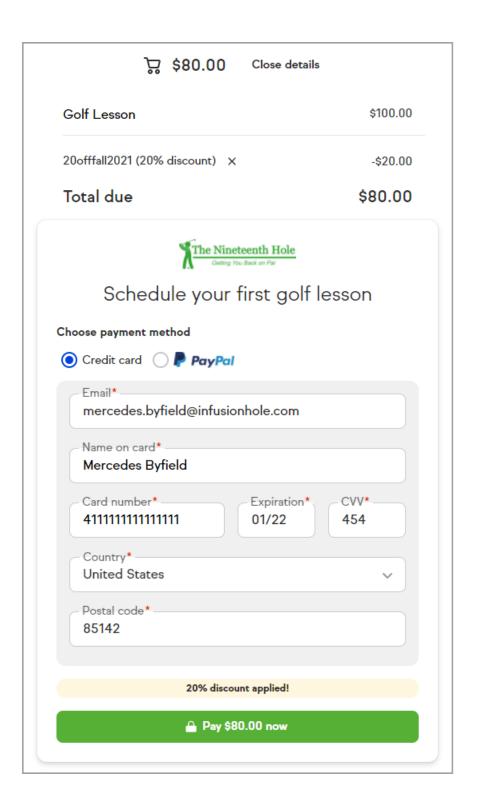


# Allow promo codes for a checkout form

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

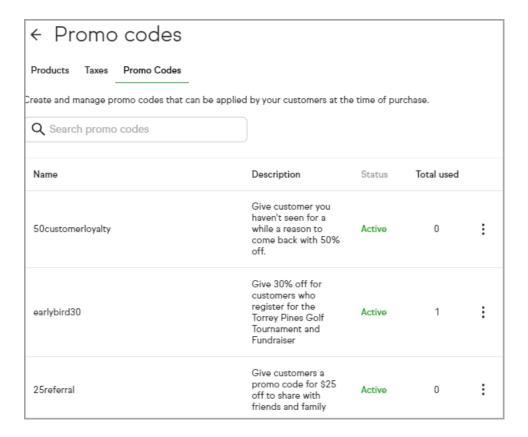


5. Share your promo code with a link to your checkout form to entice customers to buy now

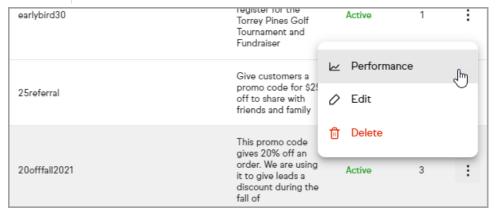


# Promo code reporting

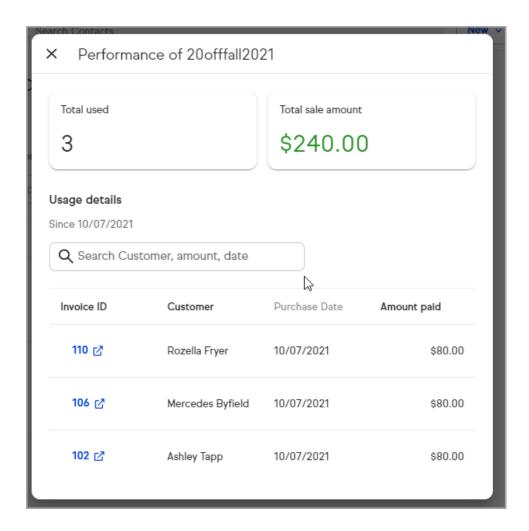
- 1. Navigate to **Products and services** from Settings
- 2. Click Promo codes to view your codes and how many times they have been used



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



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



## **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 promo codes calculated when there's multiple products?

When there are multiple products, discounts are calculated with a weighted distribution based on each products price relative to the total. This ensures each item receives a fair share of the discount, and any taxes are calculated on the adjusted (discounted) prices.

#### 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.