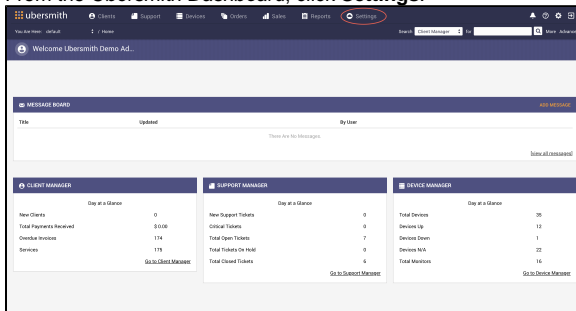


Adding Coupons

You can configure a discount code to offer a service at a lower rate for a specified date range. This feature works as a limited-time sale on your services. Coupons can be added to an order by setting the info[coupon] API field to a valid coupon code. The configured discount will then be applied to the service(s) in the order.

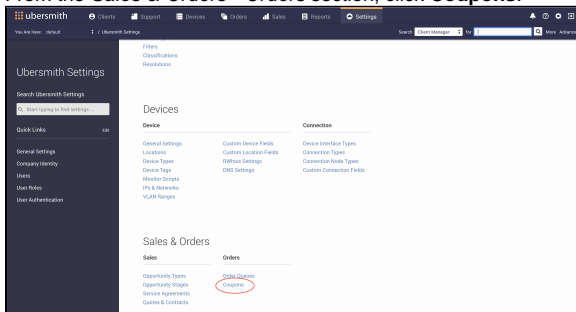
Access the Coupons Page

1. From the **Ubersmith Dashboard**, click **Settings**.



The **Ubersmith Settings** page appears.

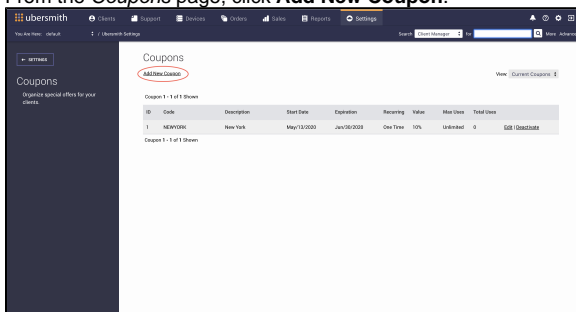
2. From the **Sales & Orders - Orders** section, click **Coupons**.



The **Coupons** page appears.

Complete the Add Coupon Page

- From the **Coupons** page, click **Add New Coupon**.



The **Add Coupon** page appears.

Complete the Coupon Details Tab

1. In the **Description** field, enter a description for the coupon.
2. In the **Coupon Code** field, enter an alphanumeric discount code or click Auto Generate to have one automatically generated. Codes are automatically formatted to be all capital letters.
3. In the **Service Plan** field, select the service this discount is for.
4. In the **Start Date** field, enter the date the sale starts.
5. In the **Expiration Date** field, enter the date the sales ends.
6. In the **Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol for the service.
7. In the **Type** field, either select recurring or one-time. A one-time coupon offers a discount for a single billing period and a recurring coupon effectively discounts the cost of a service.
8. In the **Setup Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol any service startup fees.
9. In the **Max Uses** field, enter the number of times the discount can be used, or select **unlimited**.

On this page:

On this page:

- [Access the Coupons Page](#)
- [Complete the Add Coupon Page](#)
- [Complete the Coupon Details Tab](#)
- [Complete the Upgrades Tab](#)
- [Related Topics](#)

10. In the **VIP Code** field, select **Yes** if you want only existing clients to be able to use the discount.

The screenshot shows the 'Add Coupon' form in the ubersmith system. The 'Coupon Details' tab is selected and circled in red. The form contains the following fields and options:

- English(USA) Description: 20PERCENT
- Français canadien Description: (empty)
- Português (Portugal) Description: (empty)
- Coupon Code: 20PERCENT (with an 'Auto Generate' link)
- Service Plan: Professional Services (dropdown)
- Start Date: Jun/03/2020 (calendar icon)
- Expiration Date: Jun/30/2020 (calendar icon)
- Discount: 20 % (dropdown)
- Type: ☐ Recurring ☒ One time (with a help icon)
- Setup Discount: 0 % (dropdown)
- Max Uses: (empty) ☒ Unlimited
- VIP Code: ☐ Yes ☒ No (with a help icon)

At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Complete the Upgrades Tab

If there are any upgrades for the service you are offering a discount on, configure those prices on the *Upgrades* tab.

1. After configuring the *Coupon Details* tab, click the *Upgrades* tab.
2. In the **Discount** field for the upgrade, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol for the service
3. In the **Setup Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol any service startup fees.

The screenshot shows the 'Add Coupon' form in the ubersmith system, with the 'Upgrades' tab selected and circled in red. The form displays a table of upgrades for the 'Professional Services' plan:

Upgrade	Discount	Setup Amount
Professional Services		
Project Management:		
Basic Project	10.00 %	0.00 \$
Full Project Management	20.00 %	0.00 \$

At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel', which are also circled in red.

Related Topics

[Managing Coupons](#)