# **Using Offer Codes**

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### Overview

Offer codes are a great way to help improve your proposal conversion rates. For prospects who don't initially select your proposal, you can use offer codes to try and entice them to buy.

Offer Codes rely on Parts, so you need to have a part to add to invoices or proposals that coincide with the offer.

# Video Tutorial

Click Here to Watch a Video

## **Settings and Navigation**

To set up an offer code, go to Control Panel > Offer Codes.



Offer Codes Create offer codes that your customers can use to receive discounts when accepting proposals.

## **Creating an Offer Code**

To add a new one, just click on Add... or you can Edit an existing.

Give the offer code a name. While this can be any name you want, typically you will want to use something that is all caps and with no spaces, like "SUMMER10" for example.

Edit an Offer Code	
Code*	SUMMER10
Active	
Internal	
Discount Part*	Discount V
	When an offer code is applied, the selected part will be attached to the proposal as a discount item.
Туре	Percentage Fixed Amount
Percentage*	10
Maximum Amount	150.00
Start Date	
End Date	
Days Valid	
	Create offer codes limited by the proposal's age
	B. Martin

Choose a discount **Part**. This will be a part that is automatically added to the proposal when the offer code is applied. The amount of the discount can either be a percentage of the proposal or a set amount.

You can always use the same part for your offer codes but if you use a different part, that can be handy for reporting later on, when you want to track what types of discounts are used on different proposals.

You can set a "starts on" date an "expires on" date. These can be used to create a sense of urgency with your prospects so if you do set an expiration date, be sure to communicate that to your prospects.

If you don't set an expiration date but no longer want an offer code to be valid, just clear the Active checkbox.

#### Using an Offer Code

If you have any active offer codes, an offer code input and **Apply** button will be displayed on unaccepted proposals. Your customer will type in the offer code and click Apply to see the discount. The new price will be shown and they can then accept the proposal (and pay any deposit requested or required). The accepted proposal will have the discount part and amount added when it's marked as accepted.

Offer Codes can also be configured to be valid for existing customers only... (when a proposal is written you can specify whether an off code is valid for particular users)

Non-customers Only?	
	Only valid for non-customers
Customers Only?	
	Only valid for customers

#### **Communicating Offer Codes**

It's up to you how you use offer codes. One example is with by using an Email Campaign.

You can go to your Proposals grid, create a filter that shows all of your expired proposals, then launch an email campaign that includes information about the offer code as well as a link to the proposal. Your prospects will be able to click to view the proposal as well as key in the offer code for the discount.

### **Auto Offer Codes**

Offer codes can be automatically applied to a proposal or appointment as well. This feature needs to be turned on in **Control Panel > General** to get started.

01011123.	oner control, proposal, and appointment to on their respective dorum
	Features
Time Clock?	Turn on time tracking for service agents
Contact Managed By?	Turn on the ability for contacts to manage other contacts
Contact Owned By?	Turn on the ability for contacts to be owned by users
Auto Offer Codes?	Turn on the ability set automatic offer codes on contacts
iCalendar Feeds?	Create appoinments automatically from reservation booking systems
Bids?	Turns on the Subcontractor Bids feature
	Links

After turning this on, using a Drip Trigger you can select an offer code to be automatically applied to a contact's account (by whatever trigger you designate.) Any active codes will be in the dropdown to choose from, but just make sure it's valid.

The code will display on the contact details if applied.



If you want the offer code to be removed from the contact's account, you can set up another trigger to set the auto offer code to "None" so that it will be cleared and not able to apply to another proposal or appointment.

The **Auto Offer Code** is also available as a parameter in our API, so leads coming into service**minder** can have a code automatically applied through lead capture.

### Reporting

If you use the Offer Code in an email marketing campaign, you can view the Opens/Clicks in **Campaigns**.

If you want to track them at a higher level and know more detailed revenue information, try using **Invoice Summary** or **Invoice Details** reports. You can **Filter** by **Parts**, so just select the part you used for the offer code.

# FAQs

#### If I make an offer, can I use it on an invoice? Or is it just for Proposals?

You can add the offer code to an Invoice. Click to edit the invoice, type in the name of the offer code into the Item box, and add it as line item.

ltern	Description	Quantity	Unit Price	Amount
Weekly Book Club T	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod	1	0	\$125.00
100% Discount	100% Off	1	-125	-\$125.00
	Search			
		Subtotal		\$0.00
		Tax		\$0.00
		Total		\$0.00

#### How do I hide the offer code box on the customer's view of the proposal?

There is no specific setting to hide this from a customer when they go to view their proposal. This field appears if you have any ACTIVE offer codes. If your brand has created and deployed one to all locations, then this box will appear.

	Iotal	\$45,998.4

There is no way to manually hide the offer code box unless you do not have any valid/active offer codes. You will need to make any offer code in your parts list INACTIVE, which will remove that field from proposals. If you make that part inactive, it cannot be used at any time, but you can activate it again whenever you want to.

If you simply do not want the offer code to show as a line item on a proposal if you added it (meaning you want to use it but don't want the customer to see it on their side), you can make the part "Internal".

Add a New Offer Code	
Code*	
Active	
Internal	
Discount Part*	-Select One-
	When an offer code is applied, the selected part will
Туре	Percentage Fixed Amount