Offer Codes

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Overview

Offer codes are a valuable way to improve proposal conversion rates. When prospects do not initially accept a proposal, you can use an offer code to encourage them to take action.

Offer codes rely on **Parts**, so you must have a corresponding discount part available that can be added to proposals or invoices.

This article will review:
- Settings and Navigation
- Creating an Offer Code
- Using an Offer Code
- Communicating Offer Codes
- Auto Offer Codes
- Reporting
- FAQs

Video Tutorial

Your browser does not support HTML5 video.

Settings and Navigation

To create or manage offer codes, 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

ℹ️ Before creating an offer code, make sure you have created a Part that can be used to represent this offer as a line item on your proposals and invoices. Learn more about Parts.

To create a new offer code:

1. Click **Add...** on the Offer Codes grid. You may also edit an existing offer code.

2. Give your offer code a name. While the name can be anything, most users prefer short, all-caps, no-space codes such as **SUMMER10**.

3. The **Active** box will enable/disable use of the offer code in the system. The **Internal** box causes the offer code to only be available by users on your team to apply internally, rather than a customer applying it themselves.

Add a New Offer Code

Code*

SUMMER10

Active

■

Internal

☐

4. Choose a **Discount Part** from the dropdown menu.

   ○ This will be a part that is automatically added to the proposal when the offer code is applied.

   ○ You can use the same discount part across multiple offer codes, but using different parts can make reporting easier if you want to track performance by discount type.

5. The type of discount can either be a percentage of the proposal or a set amount.

6. Set the value (percentage or amount) of the discount. A Maximum Amount will prevent the value of the discount from going over that amount (i.e., 10% discount up to $500).

Discount Part*

Discount ▼

When an offer code is applied, the selected part will be attached to the proposal as a discount item.

Type

⦿ Percentage
○ Fixed Amount

Percentage*

10

Maximum Amount

500

7. Set the **Starts On** and **Expires On** dates or **Days Valid** as needed. Adding an expiration date can help create urgency, just be sure to communicate that date to your prospects.

Start Date

End Date

Days Valid

Create offer codes limited by the proposal's age

Restrictions

Restrictions allow you to narrow down how and when an offer code can be used in the system.

- **Minimum Subtotal:** Make this code only valid if the contact picks all options on their proposal.
- **Require All Options Selected**: Make this code only valid if the contact picks all options on their proposal.
- **Minimum Selected Options**: Make this code valid only when the customer picks at least this many options on their proposal.
- **Non Customers Only:** Make this code valid only to non-customers (as designated by their contact category).
- **Customers Only:** Make this code valid only to customers (as designated by their contact category).
- **Single Use:** Make this code valid only once per contact.
- **Limit to Services:** Choose which services this code will be valid for.

Restrictions

Minimum Subtotal

350.00

Make this code valid only when the undiscounted subtotal is greater than this value

Require All Options Selected

☐

Make this code only valid if the contact picks all options on their proposal

Minimum Selected Options

1

Make this code valid only when the contact picks at least this many options on their proposal

Non-customers Only?

☐

Only valid for non-customers

Customers Only?

☐

Only valid for customers

Single Use?

☐

Only usable once by a single contact

Limit To Services

☑ Annual Maintenance
☐ Annual Maintenance Plan

Using an Offer Code

If you have active offer codes, an offer code entry field and **Apply** button will appear on any unaccepted proposal. Customers can enter the code, click Apply, and review the updated pricing before accepting the proposal and paying any required deposit. The accepted proposal will include the discount part automatically.

Item	Description	Amount
Test Service	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	$100.00
Example Part 2	Example Part 2	$600.00
	Subtotal	$700.00
	Tax	$0.00
	Total	$700.00

Offer Code [　　　　　　] [Apply]

[Accept...] [Decline] [Request Changes] [Print] [Forward]

You can also apply the Offer Code internally by typing the code into the Item field and adding it to the proposal.

Option	Item	Description	Quantity
Select a template... ▼	Test Service ▼	Lorem ipsum dolor sit amet, consectetur	1
		☐ Taxable	✏	
-option-	Example Part 1	Example Part 1	1
		✏	
-option-	Example Part 2	Example Part 2	3
		✏	
-option-	SUMMER	Search...	
	SUMMER10		
			Subtotal

The name of the associated Part and value of the discount will automatically populate:

-option-	10% Discount	SUMMER10	1	-70	-$70.00

Communicating Offer Codes

You can promote offer codes in many ways. The most commonly used method is to use Email Campaigns.
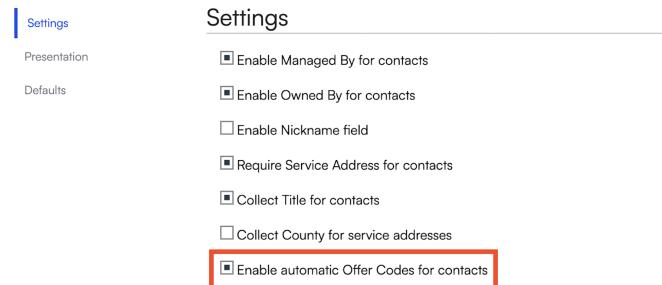
For example, if you want to create and use an offer code that targets potential customers whose proposals are over a month old, you can:

1. Filter your **Proposals** grid to show all proposals created before a certain date.

2. Launch an email campaign with a link to their proposal and details about the offer code.

3. The recipient can click to view their proposal and enter the offer code for the discount.

Auto Offer Codes

Offer codes can also be applied automatically. This feature must first be enabled in **Control Panel > Contacts**.

Once enabled, you can use a Drip Trigger to assign an offer code automatically to a contact based on the trigger criteria you choose. Only active codes appear in the dropdown, so confirm the code is valid.

An automatically applied offer code will display on the contact's details page.
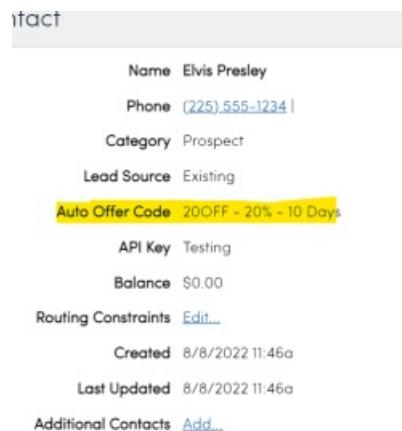
> If you want to remove an offer code automatically, create another trigger that sets the auto offer code to **None**. This clears the code from the contact's account so it won't apply to future proposals or appointments.

Auto offer codes are also available as a parameter through the API, allowing leads to have codes applied automatically through lead-capture workflows.

Reporting

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

SENT	BOUNCES	OPENS/UNIQUE	CLICKS/UNIQUE	UNSUBSCRIBES
194	7	345/109	11/5	0
View	3.6 % View	177.8 % / 56.2 % View	5.7 % / 2.6 % View	

To review revenue tied to specific offer codes, use **Invoice Summary** or **Invoice Details** reports and filter by the

discount part associated with the offer code.

Date	Count	Gross	Discount	Adj. Subtotal	Tax	Total
10/28/2024	1	$1,190.69	$129.25	$1,061.44	$0.00	$1,061.44
11/21/2024	1	$299.00	$50.00	$249.00	$0.00	$249.00
2/7/2025	1	$100.00	$0.00	$100.00	$0.00	$100.00
3/13/2025	2	$5,743.60	$574.36	$5,169.24	$0.00	$5,169.24
3/24/2025	1	$100.00	$0.00	$100.00	$0.00	$100.00
8/12/2025	1	$475.00	$0.00	$475.00	$0.00	$475.00
Total	7	$7,908.29	$753.61	$7,154.68	$0.00	$7,154.68

FAQs

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

You can use offer codes on invoices. Edit the invoice, type the offer code into the **Item** box, and add it as a line item.

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

There is no setting to hide this field. It appears automatically whenever you have one or more **active** offer codes. If your brand has deployed an active offer code, the field will display.

To remove it, make all offer codes **inactive**. Once no active offer codes remain, the field will no longer appear. You can reactivate codes at any time.

If you want to *use* an offer code but prevent the customer from seeing the discount line item, mark the discount part as **Internal**.