

## Discounts in Ultracamp

### Creating a Discount

<https://help.ultracamp.com/hc/en-us/articles/8941141357460-Getting-Started-with-Discounts#getting-started-with-discounts-0-0>

### Simple Discounts

These can be one time, multi use, per person or per account discounts for a variety of reasons.

<https://help.ultracamp.com/hc/en-us/articles/7228642097556-Simple-Discount-Templates>

#### Basic Information

- Settings > Discounts > Simple Discount Templates
- Add a new discount or edit existing discount
- Discount Name should start with your respected department and the type of discount or code (examples: CAS – dance participant, STEM – STEM15, CAS – SAP2023)
- Description (optional)
- Question Prompt/Answers – (ignore)
- Default Value – provide amount and dollars or percentage
- Allocation Account – Choose account if applicable
- Active – check

#### Behavior

- The following should always be checked:
  - Discount should be visible in admin registration process
  - Auto approve discounts when applied for
  - The others should be unchecked if not applicable. Making it visible in the registration process only allows customers to see it at checkout, it does not add it to the session.

#### Limits

- Choose any limits to this discount like age, grade, or amount limits

#### Save

#### Add Discount/Coupon Codes

- Add Discount Code
- Create Code Name
- Choose if this is a single use, multi use, per person, or per account (this will impact how many times a customer or their family could use that discount)
- Add any claim limits if applicable.

### Multi-Week/Sibling Discounts

These discounts can be triggered by number of sessions or siblings who have reservations in the checkout cart or already registered in this calendar year.

<https://help.ultracamp.com/hc/en-us/articles/7228598185492-Multi-week-Discount-Templates>

#### Basic Information

- Settings > Discounts > Multi-week templates
- Add a new discount or edit existing discount
- Discount Name should start with your respected department and the type of discount or code (examples: CAS – dance participant, STEM – STEM15, CAS – SAP2023)
- Default Value – provide amount and dollars or percentage
- Description (optional)

- Allocation Account – Choose account if applicable
- Choose if this will be visible to the public or on the session information page. This can be helpful in promotion of this type of discount.

### **Automatic Approval Settings**

- Required Reservations: how many sessions are required to trigger this discount.
- Limit – up to how much money can they receive off per person or account
- Applied Across Account: Number of different people who would need to be in the checkout
- Apply to: above criteria or reservations...
  - You can set up on number of reservations or people have to be in their cart or season history to trigger the discount.

**Save**

### **Scheduling/Adding Discount to Sessions**

**Simple Discounts - <https://help.ultracamp.com/hc/en-us/articles/7228585742100-Adding-a-Simple-Discount>**

- Scheduling > Discounts > Simple Discounts
- Choose Current Season, Your Location, Discount Template you are adding
- Check off all sessions that are eligible for this discount
- If applicable, choose begin and end dates for this discount in these sessions
- SAVE

OR

- My Sessions > Summary of Session > Find Session you want to add a discount to > Edit pencil
- In Session Editing Wizard go to Discounts > Add Discount >
- If applicable, choose begin and end dates for this discount in these sessions
- If applicable, Add any exclusions or maximums
- COMPLETE

**Multi-Week/Sibling Discounts - <https://help.ultracamp.com/hc/en-us/articles/7228503425940-Adding-a-Multiweek-Discount>**

- Scheduling > Discounts > Multi-week/Sibling Discounts
- Choose Current Season, Your Location, Discount Template you are adding
- Check off all sessions that are eligible for this discount
- If applicable, choose begin and end dates for this discount in these sessions
- SAVE

OR

- My Sessions > Summary of Session > Find Session you want to add a discount to > Edit pencil
- In Session Editing Wizard go to Discounts > Add Discount >
- If applicable, choose begin and end dates for this discount in these sessions
- If applicable, Add any exclusions or maximums
- COMPLETE

### **Reporting Discounts**

Reports > Financial > Discounts Report

## Managing Discounts on an Account

<https://help.ultracamp.com/hc/en-us/articles/7260143576468-Manage-Discounts-on-an-Account>

- Under an Account's Financial History
- The left side *Manage Discounts*
- You can add, remove, or approve discounts

### Finance Summary

**Primary Test**

Account Balance: \$ 175.00

Arranged Payments: - \$ 175.00

Unarranged Balance: = \$ 0.00

Overdue Balance: \$ 0.00

### Common Tasks

- Make / Record a Payment >>
- Print Financial Statement >>
- Payment Accounts >>
- Add Fees >>
- Manage Discounts >>**
- View Donor History >>

### Finance Detail

#### Fees and Payments

2023 - 2024 Season Timeline Focus ?

#### Reservation Fees

8/9/2023	+	TEST PL FALL (Primary)
8/2/2023	+	CANCELED TEST PL FALL (Another)
8/2/2023	+	CANCELED January 2024 - LoVetri Institute for Somatic Voicework™, Level I ONLINE (Another)
8/2/2023	+	CANCELED January 2024 - LoVetri Institute for Somatic Voicework™, Level I ONLINE (Secondary)
8/2/2023	+	CANCELED January 2024 - LoVetri Institute for Somatic Voicework™, Level I ONLINE (Secondary)

#### Payments / Credits

8/2/2023	+	Check Payment #0
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**Balance Forward** (as of 7/31/2023)

## Manage Discounts

Approved

Pending

Delete

TEST PL FALL - Primary Test - 9/25/2023

Approved: \$0.00 Pending: \$0.00

○	○	CAS - Private Lesson Initial Deposit Paid	\$ 50.00
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### Reallocate Funds

Automatically apply payments made toward these reservations to other items in the account. (Recommended)

Save Discounts >>

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