

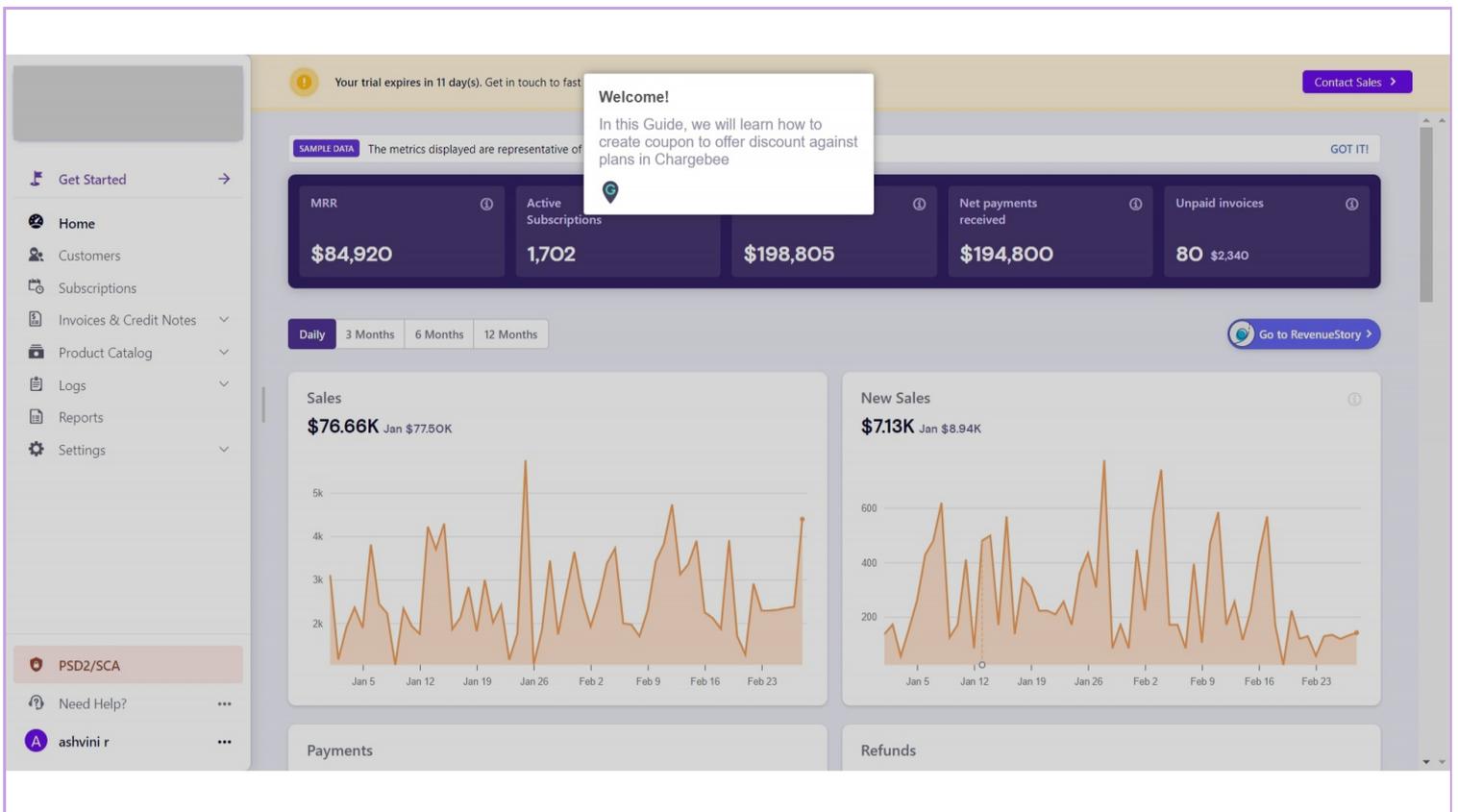


How to create coupon to offer discount against plans in Chargebee

Step: 01

Welcome!

In this Guide, we will learn how to create coupon to offer discount against plans in Chargebee



Step: 02

Click on "Product Catalog"

The screenshot shows a dashboard interface with a sidebar on the left and a main content area. The sidebar contains a menu with items: Get Started, Home, Customers, Subscriptions, Invoices & Credit Notes, Product Catalog (highlighted with a blue box and a callout box), Logs, Reports, and Settings. Below the menu are sections for PSD2/SCA, Need Help?, and a user profile for ashvini r. The main content area features a yellow notification bar at the top stating "Your trial expires in 11 day(s). Get in touch to fast track your onboarding." Below this is a "SAMPLE DATA" section with five KPI cards: MRR (\$84,920), Active Subscriptions (1,702), Net revenue (\$198,805), Net payments received (\$194,800), and Unpaid invoices (80 \$2,340). A "Go to RevenueStory" button is also present. The main area contains two line charts: "Sales" showing a total of \$76.66K (Jan \$77.50K) and "New Sales" showing a total of \$7.13K (Jan \$8.94K). Both charts show data from Jan 5 to Feb 23. At the bottom, there are sections for "Payments" and "Refunds".

Step: 03

Click on "Coupons"

The screenshot shows a dashboard with a left-hand navigation menu. The 'Coupons' menu item is highlighted with a blue border and a tooltip that says 'Click on "Coupons"'. The main dashboard area features a top navigation bar with a trial expiration notice and a 'Contact Sales' button. Below this is a 'SAMPLE DATA' section with five key metrics: MRR (\$84,920), Active Subscriptions (1,702), Net revenue (\$198,805), Net payments received (\$194,800), and Unpaid invoices (80 \$2,340). The dashboard also includes two line charts: 'New Sales' showing a peak of \$7.13K and a previous peak of \$8.94K, and another chart for 'Payments' and 'Refunds'. A 'Go to RevenueStory' button is visible in the top right of the dashboard area.

Step: 04

Click on "Create Coupon"

The screenshot shows a dashboard for managing coupons. At the top, a yellow banner indicates a trial expiration. Below this, a navigation bar includes a search filter and a '+ Create Coupon' button. A callout box points to this button with the text 'Click on "Create Coupon"'. The main content area displays a table of three active coupons.

<input type="checkbox"/> Coupon Info	Apply On	Discount Details	Redemptions	Valid Till
<input type="checkbox"/> ACTIVE Holidays cbdemo_holidays	Each specified item	\$15.00 USD for Forever	0 of unlimited	—
<input type="checkbox"/> ACTIVE You are Special cbdemo_youarespecial	Each specified item	5% for Forever	0 of unlimited	—
<input type="checkbox"/> ACTIVE Early Bird cbdemo_earlybird	Each specified item	\$10.00 USD for 12 month(s)	0 of unlimited	—

Step: 05

Enter a "Coupon name"

1 Your trial expires in 11 day(s). Get in touch to fast track your onboarding. [CONTACT SALES](#)

Coupons
Create a New Coupon

Name* **Enter a "Coupon name"**
A descriptive name for this coupon. Please note this will be displayed to customers, in case "Invoice Name" field is not provided.

Id*
This will be the reference used by Chargebee API to identify this coupon.

Invoice Name
Name displayed to your customers on the invoices and hosted payment pages.

Discount

Discount Type* Percentage %
The specified percentage will be given as discount.

Apply On* Invoice amount
Discount will be applied to the total invoice amount. [Learn more](#)

Duration

Duration Type* One Time

Help
Click here to learn more about Coupons. If you need help on creating or configuring your coupons, please contact us.

Get Started →

- Home
- Customers
- Subscriptions
- Invoices & Credit Notes
- Product Catalog
 - Plans
 - Addons
- Coupons**
 - Coupon Sets
- Logs
- Reports
- Settings
- PSD2/SCA
- Need Help?
- ashvini r

Step: 06

Enter "Discount" related details

Specify discount type and amount category, wherever you want to apply discount

Your trial expires in 11 day(s). Get in touch to fast track your onboarding. [CONTACT SALES >](#)

Coupons

Create a New Coupon

Invoice Name
Name displayed to your customers on the invoices and hosted payment pages.

Discount

Discount Type* %
The specified percentage will be given as discount.

Apply On*
Discount will be applied to the total invoice amount. [Learn more](#)

Duration

Duration Type* One Time Forever Limited Period month(s)
How long should this coupon be applied to the subscription?

Validity

Valid Till
Date (along with Time) upto which the coupon can be applied to new subscriptions.

Maximum Redemptions

Enter "Discount" related details
Specify discount type and amount category, wherever you want to apply discount

Step: 07

Select maximum duration for the coupon to remain applied to the subscription

Apply On* Each Specified item
Discount will be applied to each plan and addon item specified. Learn more

Plans None All Select
Applicable to all plans

Addons None All Select
Applicable to all addons

Duration

Duration Type* One Time Forever Limited Period month(s)
How long should this coupon be applied to the subscription?

Validity

Valid Till
Date (along with Time) upto which the coupon can be applied to new subscriptions.

Maximum Redemptions
Maximum number of times this coupon can be redeemed.

Callout: Select maximum duration for the coupon to remain applied to the subscription

Step: 08

Enter "Validity"

Your trial expires in 11 day(s). Get in touch to fast track your onboarding. [CONTACT SALES](#)

Coupons
Create a New Coupon

Duration

Duration Type*

How long should this coupon be applied to the subscription?

One Time

Forever

Limited Period month(s)

Validity

Valid Till

Date (along with Time) upto which the coupon can be applied to new subscriptions.

Maximum Redemptions

Maximum number of times this coupon can be redeemed.

[Save](#) [Save & Create New](#) [Cancel](#)

PSD2/SCA

Need Help?

ashvini r

Privacy Terms

Enter "Validity"

Step: 09

Click on "Save" to create your coupon

The screenshot shows a web application interface for creating a new coupon. At the top, a yellow banner displays a notification: "Your trial expires in 11 day(s). Get in touch to fast track your onboarding." with a "CONTACT SALES" button. The main content area is titled "Coupons" and "Create a New Coupon".

Duration

Duration Type*

- One Time
- Forever
- Limited Period month(s)

How long should this coupon be applied to the subscription?

Validity

Valid Till

Date (along with Time) upto which the coupon can be applied to new subscriptions.

Maximum Redemptions

Maximum number of times this coupon can be redeemed.

Buttons: **Save**, **Save & Create New**, **Cancel**

Callout Box: Click on "Save" to create your coupon

Left Sidebar: Get Started, Home, Customers, Subscriptions, Invoices & Credit Notes, Product Catalog, Plans, Addons, Coupons, Coupon Sets, Logs, Reports, Settings, PSD2/SCA, Need Help?, ashvini r

Bottom Right: Privacy Terms

Thank You!

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