

13.4.4. Create and Manage Enrollment Codes

If an organization wants to purchase enrollment for multiple seats in your course at one time, you can create enrollment codes for the organization. The purchasing organization then distributes these codes to its learners. Each enrollment code has an associated URL that learners use to enroll in the course directly. Learners do not have to pay any additional fees.

Unlike coupon codes, which are valid for multiple learners, each enrollment code is valid for only one learner.

13.4.4.1. Create Enrollment Codes

You create enrollment codes on the **E-Commerce** page on the Instructor Dashboard. To see the **E-Commerce** page, you must have either the Sales Admin or Finance Admin role.

1. On the Instructor Dashboard, select the **E-Commerce** page.
2. In the **Enrollment Codes** section, select **Create Enrollment Codes**.
3. When the **Create Enrollment Codes** form opens, complete the form. The following fields are required.
 - Organization name
 - Organization contact
 - Organization contact email
 - Organization billing address
 - Invoice recipient
 - Number of seats
 - Price per seat
4. At the bottom of the form, select **Create Enrollment Codes**.

When you select **Create Enrollment Codes**, the system automatically creates a comma-separated values (.csv) file and downloads the .csv file to your computer. In addition to information about your course and the transaction, such as the invoice

number, the .csv file contains course enrollment codes and URLs. Each enrollment code has a separate URL, and only one learner can use each enrollment code.

The system also sends a confirmation email to the purchasing organization. The email instructs the purchasing organization to distribute enrollment codes to learners and includes a template that the organization can use. The email has two attachments: an invoice and a .csv file. The .csv file contains only the enrollment codes and their associated URLs. It does not contain additional information about your course or the transaction.

13.4.4.1.1. Change the Default Email

When you create enrollment codes, the system automatically sends a confirmation email message to the purchasing organization. You can change the default confirmation message according to your organization.

To change the default email, follow these steps.

1. In your Open edX repository, go to the **edx- platform/lms/templates/emails** folder.
2. In a text editor, open the following three files.
 - **registration_codes_sale_email.txt**: The confirmation email to send to the purchasing organization. This email can include a sample message that the purchasing organization can use to distribute enrollment codes to individual learners.
 - **registration_codes_sale_invoice_attachment.txt**: The invoice for the purchasing organization. The invoice can include payment instructions.
 - **order_confirmation_email.txt**: The confirmation email to send to the purchasing organization.

3. Make any changes that you want to make, and then save your changes.

13.4.4.2. Manage Enrollment Codes and Invoices

Both sales admins and finance admins can cancel an enrollment code, restore an enrollment code, or mark an enrollment code as unused. In addition, finance admins can cancel and resubmit the invoices that accompany enrollment codes.

13.4.4.2.1. Manage Enrollment Codes

You manage individual enrollment codes in the **Enrollment Codes** section of the **E-Commerce** page. To see the **E-Commerce** page, you must have either the Sales Admin or Finance Admin role.

In the **Enrollment Codes** section, you can perform the following transactions.

- Cancel enrollment codes.
- Restore enrollment codes.
- Mark enrollment codes as unused.

To cancel, restore, or mark an enrollment code as unused, follow these steps.

1. On the Instructor Dashboard, select the **E-Commerce** page, and then select the **Enrollment Codes** section.
2. Under **Cancel, restore, or mark an enrollment code as unused**, select **Change Enrollment Code Status**.
3. In the **Enrollment Code Status** dialog box, enter an enrollment code in the **Enrollment Code** field, and then select **Find Enrollment Code**.
4. When the status for the enrollment code appears **Find Enrollment Code**, you can see the possible actions for that enrollment code under **Actions**. Select the action that you want to take.

ENROLLMENT CODE STATUS ✕

Change the status of an enrollment code.

Enrollment Code

XXXXXXXXXX

Find Enrollment Code

Code	Used	Valid	Actions
XXXXXXXXXX	Yes	Yes	Cancel enrollment code Mark enrollment code as unused

Note

After you cancel an enrollment code, the learner who used that enrollment code is no longer enrolled in the course and cannot see any course content.

13.4.4.2.2. Manage Invoices

You cancel and resubmit invoices for enrollment codes or course seat purchases in the **Course Seat Purchases** section of the **E-Commerce** page. To see the **Course Seat Purchases** section of the **E-Commerce** page, you must have the Finance Admin role. For information, see [Assign Admin Roles](#).

To cancel or resubmit an invoice, follow these steps.

1. Locate the number of the invoice that you want to cancel or resubmit. You can download a list of all the invoices for the course by selecting **Download All Invoices**.
2. On the Instructor Dashboard, select the **E-Commerce** page, and then select the **Course Seat Purchases** section.
3. Select the action that you want to complete.

- To cancel an invoice, enter the invoice number in the **Invoice Number** field, and then select **Cancel Invoice**.
- To resubmit an invoice, enter the invoice number in the **Invoice Number** field, and then select **Resubmit Invoice**. You can find the invoice number in the .csv file that the system creates and downloads to your computer when you create enrollment codes.

Note

After you cancel an invoice, learners who have used any of the enrollment codes on the invoice are no longer enrolled in the course and cannot see any course content.

13.4.5. View Enrollment Code and Credit Card Sales Information

Both sales admins and finance admins can download reports about enrollment codes. In addition, finance admins can see and download information about invoices and credit card sales.

13.4.5.1. Download Enrollment Code Reports

You download enrollment code reports in the **Enrollment Codes** section of the **E-Commerce** page. To see the **E-Commerce** page, you must have either the Sales Admin or Finance Admin role. For information, see [Assign Admin Roles](#).

To help you keep track of the enrollment codes that have been issued for your course, you can download .csv files that contain enrollment code reports. The reports contain data such as the following information.

- A list of the enrollment codes.
- The organization that purchased the enrollment codes.
- The name and e-mail address of the person who purchased the codes.
- The date a specific enrollment code was used.
- The user ID of the learner who used a specific code.

You can download the following reports.

- All enrollment codes that have been purchased for the course.
- The enrollment codes for the course that remain unused.
- The enrollment codes for the course that have been used.

To download an enrollment code report, select the **E-Commerce** page on the Instructor Dashboard, and then select the report that you want in the **Enrollment Codes** section. If you enter an organization name in the **Company Name** field, the report contains the enrollment codes for only that organization.

13.4.5.2. Download Invoice and Credit Card Sales Information

To see information about financial transactions, including a list of enrollment code invoices and detailed credit card purchase information, you can download .csv files in the **Course Seat Purchases** section of the **E-Commerce** page. To see the **Course Seat Purchases** section of the **E-Commerce** page, you must have the Finance Admin role.

To see financial transaction information, follow these steps.

1. On the Instructor Dashboard, select the **E-Commerce** page, and then select the **Course Seat Purchases** section.
2. Select the action that you want to complete.

- View the total dollar amount that the course has received for all credit card transactions.
- To download a .csv file of all the invoices for enrollment codes, select **Download All Invoices**. This .csv file contains information such as the invoice number, the company that purchased the enrollment codes, the number of enrollment codes purchased, and the number of enrollment codes that have been used.
- To download a .csv file of all credit card purchases, select **Download Credit Card Purchases**. This .csv file contains information such as the order ID number, the username of the purchaser, the company that the purchaser is affiliated with (if any), and the date and time of the purchase.