

You've opted-in to a patient promo. Now what?

Use this checklist to maximize your reach during the upcoming patient promotion.



1. Verify your discounts

From your practitioner menu, select “Dispensary settings” and then “Patient promotions.” Verify that you’re comfortable with the discount you’ve selected. The discount will be added on top of any existing store or individual patient discount.

For cases where certain patients need different discounts, use the [Bulk discount editor](#) to adjust individual discounts in groups with filters like total discount to ensure everyone’s getting the savings they need.

2. Check your dispensary name

[Verify your dispensary name](#) is set to something that'll make sense to your patients, for example, “Dr. Smith’s Fullscript dispensary.” Using your name, email, or anything with unfamiliar characters (@,#,\$,%, etc.) can confuse patients and stop them from ordering.

3. Add your patients

Make sure you have all your patients uploaded to your Fullscript dispensary. You can add them individually or in bulk. [Click here for detailed instructions.](#)

Tip: Select the option to send patients a welcome email, so they know you’ve added them to your dispensary!

4. Set catalog permissions to “Open catalog”

Depending on your preferences and practice, an open catalog can give patients more access. Patients can shop independently and save on all products, including personal care products (skin support, oral care, women’s health, etc.) and supplements for their family members.

From your practitioner menu, select “Dispensary settings” and then “Permissions.” Select the “Patients” tab and choose the “Open catalog” catalog setting. [Click here for detailed instructions.](#)

5. Promote the sale to your patients

We’ve created graphics and messaging to use on social media and ready-made emails for you to promote the upcoming patient promotion. Although we’ll be emailing your active patients about the upcoming sale, it’s always more impactful coming from you!

Explore the [“Graphics”](#) and the [“Messaging”](#) sections of the [promo marketing toolkit](#).

Important note: Per our [Acceptable Use Policy](#), you can't advertise a specific discount on your social media accounts or other public-facing channels.

Need extra help?

Get in touch with our team.

Fullscript’s Customer Success Team can help you via email, live, chat or phone if you have any questions. You can also self-serve with articles in our Support Center.

If you have an Account Manager, contact them directly. They can even send you a report to review your sale’s performance.

[Visit the Fullscript Support Center](#)