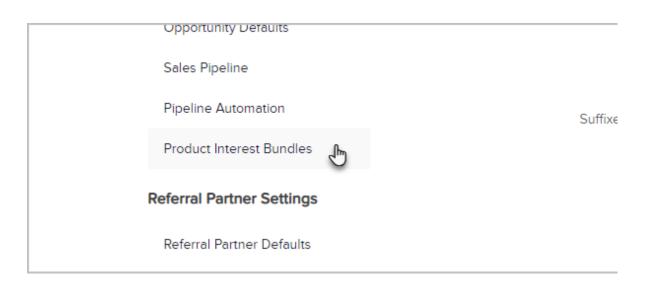
Product Interest Bundles %

Product interest bundles are Infusionsoft's "Buy Now" links.

Product interest bundles are groups of products that are commonly purchased together. They can be used to automatically generate the product/subscription program when an opportunity is created through an action, or a sales rep can manually add a product Interest bundle to an opportunity record after talking with a prospect. Using product interest bundles is an alternative to adding products and subscriptions to an opportunity record one at a time. You must add products and subscription program records to Infusionsoft before you create product interest bundles.

You need to enter product and subscription program names while creating the bundles. Before you start, you may want to print a list of products (E-Commerce > Products) to reference.

- 1. Go to **CRM > Settings** in the main navigation menu.
- 2. Click on **Product Interest Bundles** in the *Settings* menu.



3. Click on the Add Product Interest Bundle button.

Visitors	Service Tickets 🗸	Reports 🗸	Settings	
		Add Produc	t Interest Bundle	
	Descripti	ion		
	qweqweq	we		

4. Enter the Bundle Name and Description.

Product I	nterest Bundle	
Bundle Name	Golf Gear	
Description	A complete set of golf clothing	
Save	ave & Search	

5. **Bundle Name**: Sales reps will need to recognize the bundle by name when adding it to an opportunity record. It should be short but descriptive. The customer will not see this information.

Description: This is a note to yourself about why you created this bundle and when it should be used. It might also include a date to remove the bundle so that sales reps can no longer use it.

6. Click on the **Save** button. Click on the **Interests** tab to add products to the bundle. You will add one time products and products with subscription plans separately.

Product Interest Bun	dle Added	
Manage	Product Interest Bu	Indle
General Inte	rests	
Interests		
Product	Product Name	×

7. Type in the name of a product or subscription program to find possible matches, then click the name of the product in the drop-down to select it.

Interests			
Product	g	×	Add
Subscription Plan	Golf Shoes	×	Add
	Golf Clubs		
Products Price	Golf Pants	unt %	Total
	Golf Balls		
No Product Interests	Golf Shirt		
	Golf Gloves		
Subscription Plans	PGA Pro Golf Lesson	iscount %	Total
	Get More Distance on Your Drive		
No Subscription Plan	nterests		

8. Click on the **Add** button to add the product or subscription to the bundle. Repeat this process to add more products and/or subscription programs.

nter	ests				_
	Golf Pants		V	Add	
	Subscriptio	on Plan Name	×	Add	
rice	Qty	Subtotal	Discount %	Total	
sts					

9. Click on **Edit** to change the quantity and/or apply a discount to an item in the bundle.

Product	Name		×		Add
Subscription Plan Name		×		Add	
Qty	Subtotal	Discount %	Total		
1	\$50.00	0	\$50.00	<u>Edit</u> راس	Remove
1	\$55.00	0	\$55.00	Edit	Remove
1	\$89.99	0	\$89.99	Edit	Remove
1	\$30.00	0	\$30.00	Edit	Remove

10. Click on the **Save** button when you are finished.