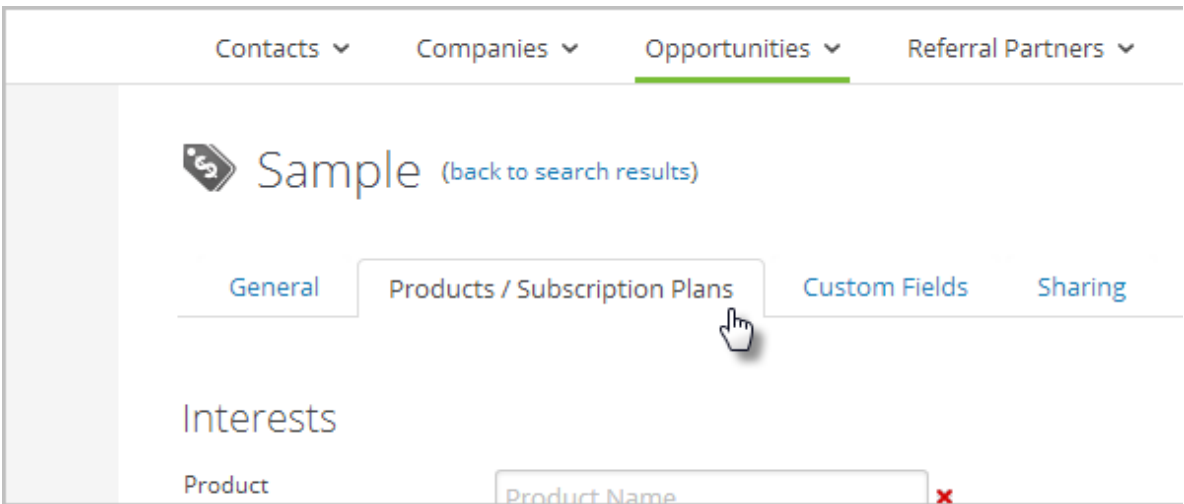


# Track Product Interest In An Opportunity Record

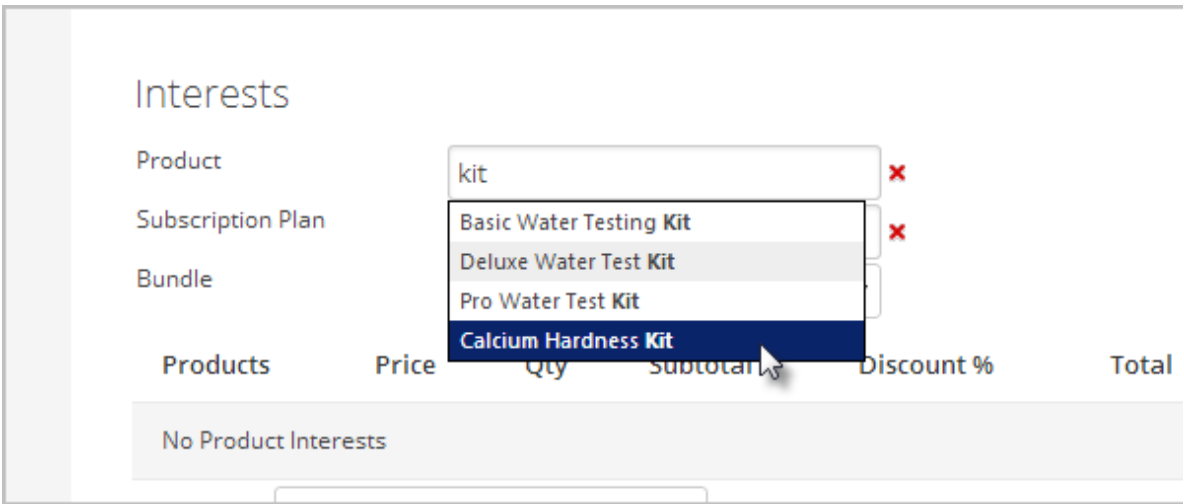
As you are working with a prospect, you will learn more about their specific needs and the products you sell that will meet them. If your company is using the Infusionsoft E-commerce module, then you will be able to track the prospect's interests in the Product/Subscription Programs tab of an Opportunity Record.

**Pro Tip!** Adding products/subscriptions to an opportunity is how Infusionsoft calculates the revenue forecast report.

1. While viewing an opportunity record, click on the **Products / Subscription Plans** tab.



2. Add interests one at a time or select a **Product Interest Bundle** from the drop-down.



3. After selecting the product or subscription program, click on the **Add** button.

The screenshot shows a user interface for adding products or subscription programs. At the top, there are tabs for 'Custom Fields' and 'Sharing'. Below these, there are two input fields: one with 's Kit' and a green checkmark, and another with 'Kit' and a red 'x'. To the right of these fields are three 'Add' buttons. Below the input fields, there is a table with columns 'Subtotal', 'Discount %', and 'Total'. On the right side of the interface, there is a sidebar with the following sections: 'Opportunity Summary', 'Contact Information:' (showing 'No Leadsources'), 'Score:' (showing 'Temp Not scored yet. Calculating'), and 'Opportunity Notes:'.

4. (Optional) Repeat this process to add more products.

5. (Optional) Click on **Edit** to change the quantity for one of the products or to enter a percentage discount (e.g. a 30% discount), and then click on **Save**.

The screenshot shows a user interface for editing products or subscription programs. At the top, there are two input fields: one with 'n Plan Name' and a red 'x', and another with 'ct a bundle' and a dropdown arrow. To the right of these fields are two 'Add' buttons. Below these fields, there is a table with columns 'Qty', 'Subtotal', 'Discount %', and 'Total'. The table contains one row with values '\$20.95', '0', and '\$20.95'. To the right of this row are two buttons: 'Edit...' and 'Remove'. Below the table, there is a dropdown arrow. On the right side of the interface, there is a sidebar with the following sections: 'No Leadsources', 'Score:' (showing 'Temp Not scored yet. Calculating'), and 'Opportunity Notes:' (with a 'Preview Notes' link).

6. (Optional) Select a pay plan from the drop-down.

Bundle Please select a bundle ▼

Products	Price	Qty	Subtotal	Discount %	Total
Calcium Hardness Kit	\$20.95	1	\$20.95	0	\$20.95

Pay Plan Id Cart Payment Plan ▼

Subscription Plans	Price	Qty	Subtotal	Discount %
No Subscription Plan Interests				

Free Trial Days

This will split the customer's purchase into multiple installments and may involve interest fees. Make sure you are familiar with the details of the pay plans your company offers.

- (Optional) If the prospect is interested in a subscription program, you can give them a free trial period. The person will not be charged the first fee until the free trial is over.

Pay Plan Id Cart Payment Plan ▼


Subscription Plans	Price	Qty	Subtotal	Discount %
No Subscription Plan Interests				

Free Trial Days

Offer Expires   Buy Now links will be g

Save Save & Search Delete Select an action

- (Optional) Set an expiration date for the offer. If you send a buy now link, the prospect will not be able to purchase after the date entered here. By default, the buy now links expire after 30 days.

Subscription Plans	Price	Qty	Subtotal	Discount %
No Subscription Plan Interests				
Free Trial Days	<input type="text" value="0"/>			
Offer Expires	<input type="text" value="04-01-2015"/>		<input type="text" value="12:00 AM"/>	▼ Buy Now links will be good for 30 day
<div><div>Save</div><div>Save &amp; Search</div><div>Delete</div><div>Select an action ▼</div><div>Last</div></div>				

9. Click on the **Save** button to apply the update.