

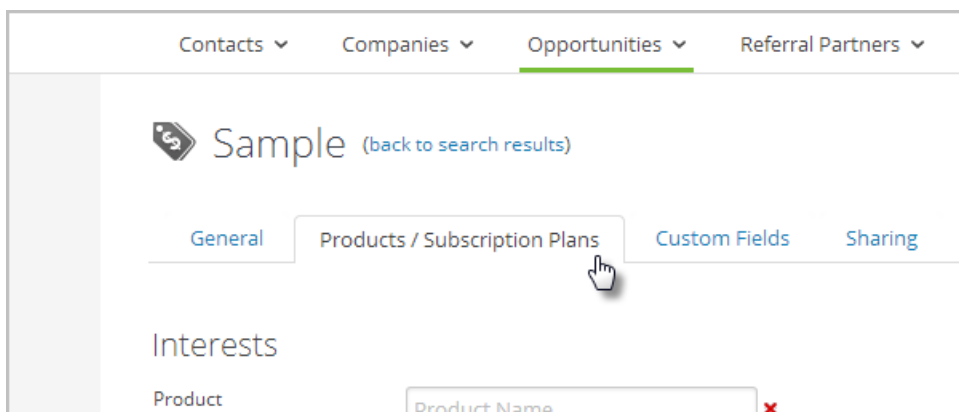
Track Product Interest In An Opportunity Record

This article applies to:

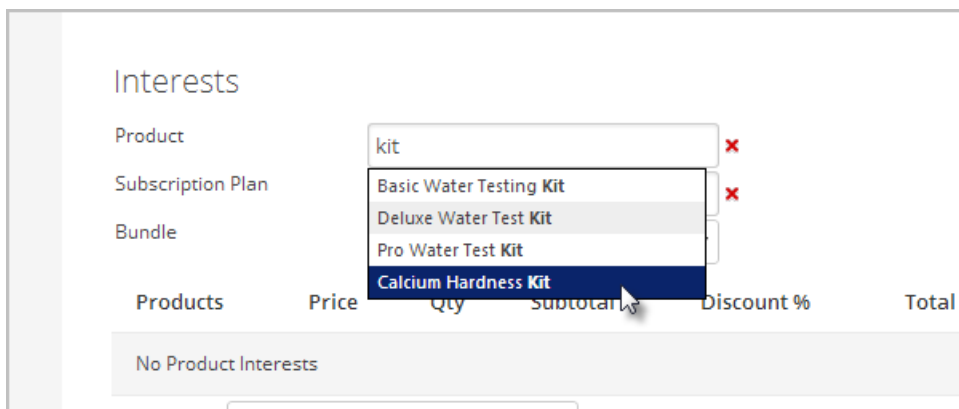
As you are working with a prospect, you will learn more about their specific needs and the products you sell that will meet them. If your company is using the Max Classic E-commerce module, then you will be able to track the prospect's interests in the Product/Subscription Programs tab of an Opportunity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

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

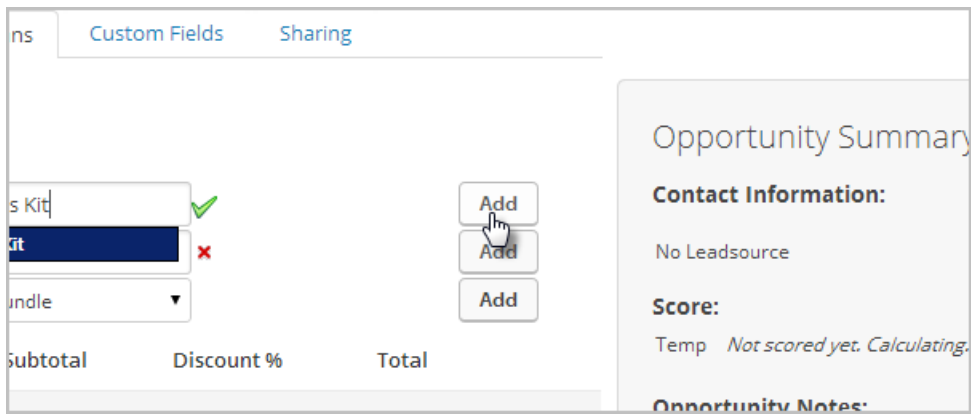
1. While viewing an opportunity record, click on the **Products / Subscription Plans** tab.



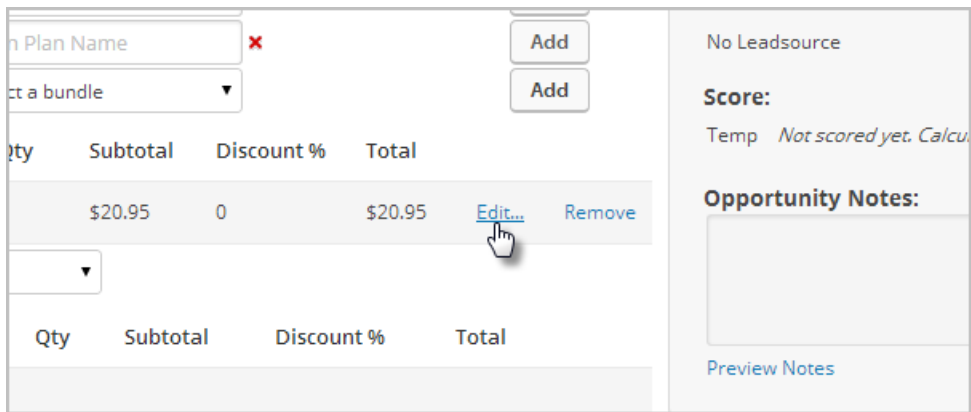
2. Add interests one at a time or select a **Product Interest Bundle** from the drop-down.



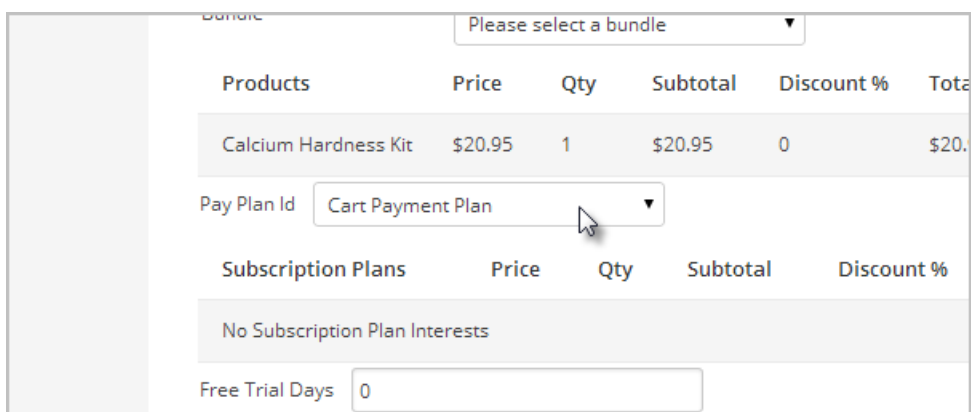
3. After selecting the product or subscription program, click on the **Add** button.



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**.



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



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.

7. (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

Subscription Plans	Price	Qty	Subtotal	Disc
No Subscription Plan Interests				
Free Trial Days	<input type="text" value="10"/>			
Offer Expires	<input type="text" value="04-01-2015"/>	<input type="text" value="12:00 AM"/>	Buy Now links will be g	
<input type="button" value="Save"/> <input type="button" value="Save & Search"/> <input type="button" value="Delete"/> <input type="button" value="Select an action"/>				

8. (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	
<input type="button" value="Save"/> <input type="button" value="Save & Search"/> <input type="button" value="Delete"/> <input type="button" value="Select an action"/>				

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