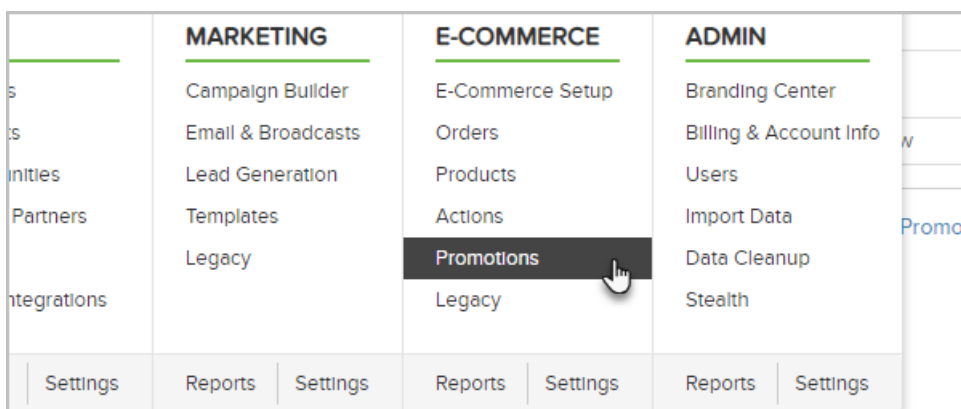


Create a Free Trial Subscription Promotion 🔗

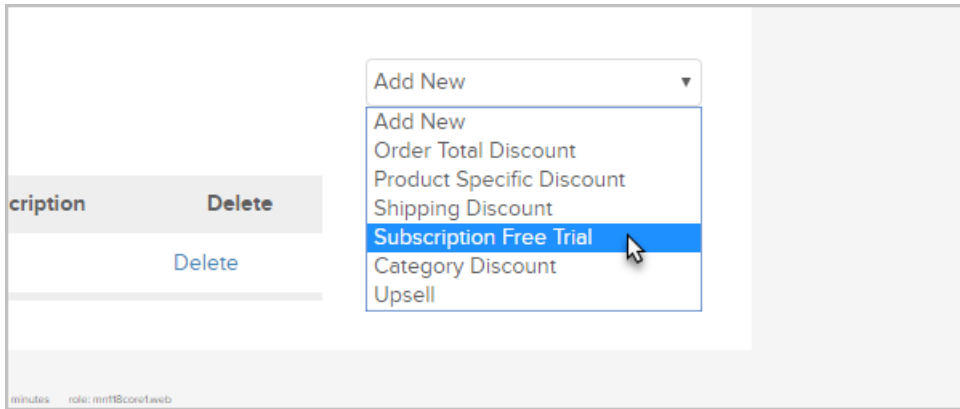
A subscription free trial delays the first charge of a recurring billing program so you can use a free trial period to eliminate the purchase barrier by providing a "try before you buy" offer. The customer does not get billed immediately, but is required to enter credit card information during the purchase. When the trial expires, Infusionsoft will automatically bill the first charge and every charge thereafter, until the program is canceled. You define the number of free trial days along with any other eligibility criteria.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to E-Commerce > Promotions



2. Select **Subscription Free Trial** from the drop-down.



3. Enter the following details...

- **Name:** The name only shows up for your Infusionsoft users. It should be short but descriptive (e.g. 30 Day Free Trial.)
- **Description:** The description is used to further describe the benefits of the discount, but it only shows up for customers in the order summary section of the legacy shopping cart. It also shows up on legacy order forms, legacy receipts, and legacy invoices. It can further describe the discount benefits.
- **Subscription Plan:** Select a subscription plan from the drop-down.
- **Free Trial Days:** Enter a number of days to delay the first billing for the subscription program. This number will show up on the shopping cart summary.
- **Hide Price:** Choose **Yes** if you do not want the subscription program price and billing cycle displayed in the shopping cart order summary along with the free trial days.

 A screenshot of a form for creating a discount. The form has the following fields:

- Name:** A text input field containing '30 Day Free Trial'.
- Description:** A text area containing '30-Day Free Trial'. Below the text area, it says '83 characters left (Some special characters like < or > may count as'.
- Subscription Plan:** A dropdown menu showing 'Weekly Pool Checkup - Every 1'.
- Free Trial Days:** A text input field containing '30'.
- Hide Price?:** A radio button group with 'Yes' selected and 'No' unselected.

4. Click Save

Free Trial Days 30

Hide Price? Yes No

Save

5. Enter the criteria in which the promotion will be available. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must **ALL** be true to make the purchase eligible for the discount. **Please note that the subscription product selected in step 3 does not need to be added to the criteria in step 5 - this will cause the promotion to not function!**

6. Click on the **Add Criteria** drop-down and choose a criteria

Criteria Add Criteria

Description Edit

No Crite

Add Criteria

Date Range Criteria

Promo Code Criteria

Product/Qty Criteria

Subscription Plan in Cart

Order Total Criteria

Save

7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

Manage Date Range Criteria

Information

Start Date 11-18-2019

End Date 11-30-2019

Save

8. **Save** the criteria and **Save** the discount.

Example shopping cart free-trial and an example free-trial invoice:

SHOPPING CART

Name	Price	Qty	Total
Subscription -- Trial 30 days free, then \$10.00 / month for 12 months Remove	\$10.00 \$0.00	<input type="text" value="1"/> Update	\$0.00
Sub Total:			\$0.00

Enter a Promo Code:

Apply

Billing Information

Order Items

Calculate Tax Add Order Item

Name	Cost/Unit	Price/Unit	Type	Total Cost	Total Price	Margin	Fulfillment	Modify Fulfillment	Remove
Subscription -- Trial	\$0.00	\$10.00 x 1	Subscription Plan	\$0.00	\$10.00	\$10.00	N/A	N/A	Remove
First month FREE	\$0.00	-\$10.00 x 1	Special: Free Trial Days	\$0.00	-\$10.00	-\$10.00	N/A	N/A	Remove
ORDER TOTAL				\$0.00	\$0.00	\$0.00			

Payments

Add Payment Refund Payment

Date	Type	Status	Amount	Note
11/7/2019	Credit Card	APPROVED (Visa xxxxxxxxxxxxxx1111)	\$0.00	Auto Charge For Invoice Ids:17914
Payment Total			\$0.00	
BALANCE			\$0.00	

Commissions

Recalculate Create Commission

Referral Partner	Commission	Item	Sold	Earned
Chrisj	Level 1 Standard Commission Program - Default	Subscription -- Trial - \$10.00 -	\$0.00	\$0.00
TOTAL COMMISSIONS			\$0.00	\$0.00

Payment Plan

Edit Payment Plan

Auto Charge: Yes [\[View Payment Attempt History\]](#)

Email the invoice to the customer upon successful payment

Pmt #	Status	AmtDue	Paid	Date
Pmt 1	Paid	\$0.00	\$0.00	11/7/2019

Save Save & Search Delete Preview Invoice Send Invoice Chargeback Dispute Clone

Created: System Thursday, November 7, 2019 2:14:06 PM
 Last Updated: Chris Jones Thursday, November 7, 2019 2:14:06 PM ?