

Proposal Bundling

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Overview

Proposal Bundling lets you combine multiple proposals into a single grouped offer for a customer. It's ideal for "pick one" scenarios where the customer is choosing between distinct options, such as varying levels of service or materials. Instead of overwhelming them with multiple proposals, bundling streamlines their decision-making process and improves your close rate tracking.

For example, you might present two proposals for window installation:

- One for minimal work (lower cost)
- One for your recommended option (higher value, with extras like weather stripping or upgraded materials)

With bundling, both are presented together and the customer chooses the one that suits them best.

This article will review:

- [What is a Bundle?](#)
- [Bundling and Unbundling Proposals](#)
- [Bundle Display Options](#)
- [FAQs](#)

Video Tutorial

Your browser does not support HTML5 video.

What is a Bundle?

A **proposal bundle** consists of two or more proposals created for the same contact.



Bundles can sometimes be confused with **Options**, but the two perform different functions. The key difference between bundling and standard proposal options is:

- **Bundle** = customer picks **one** proposal from a set of unique proposals
- **Options** = customer can pick **any number** of optional line items within a **single** proposal

Bundled proposals count as **one** proposal in your reports. If you send three standalone proposals and only one gets accepted, your close rate is 33%. But if those same proposals are bundled, and one is accepted, your close rate becomes 100%.

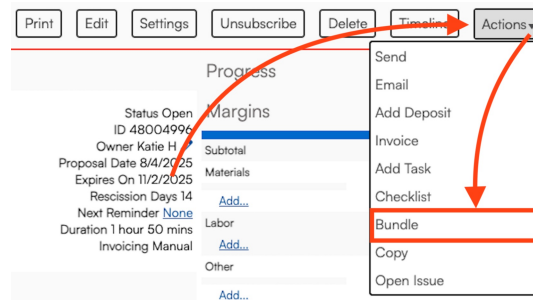
Bundling improves presentation and gives you more accurate sales data.

Bundling and Unbundling Proposals

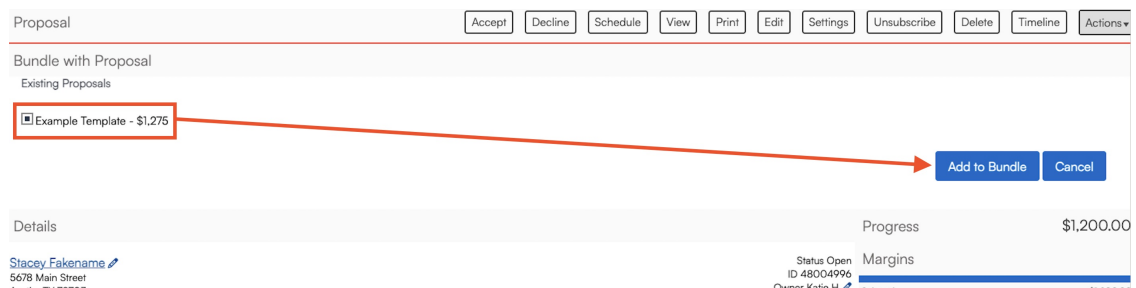
Bundling Proposals

If you have two Open proposals for the same contact that you would like to bundle together:

1. Go to one of the proposals.
2. Open the **Actions** menu and choose **Bundle**.



3. Select one or more additional proposals to include.
4. Click to confirm the bundle.



You can also click the **Bundle New...** tab from within an open proposal to create a brand new bundled proposal directly.

Example Template 2 - \$1,200		Bundle new...
Item	Description	
Test Service	Sample description of service.	
Example Part 1	Example Part 1	
Example Part 2	Example Part 2	



Each proposal in a bundle still behaves like a standalone proposal. You can set unique options, offer codes, and payment terms for each one.

When viewing a set of bundled proposals, you will see a tab for each one above the line items.

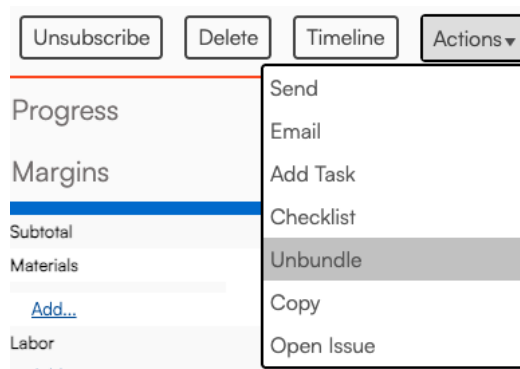
- The default proposal is indicated by an asterisk.
- The proposal you are viewing and editing bold and highlighted in blue.
- The proposal tabs can be dragged into any order and will display in that order on the customer view.

* Example Template - \$1,275 Example Template 2 - \$1,200 Example Template 3 - \$400 Bundle new...					
Item	Description	Qty	Rate	Amount	
Test Service	Sample description of service.	1	0.00	\$0.00	
Example Part 1	Example Part 1	5	150.00	\$750.00	
Example Part 2	Example Part 2	2	225.00	\$450.00	
Example Part 3	Example Part 3	1	75.00	\$75.00	
			Subtotal	\$1,275.00	

Unbundling Proposals

To remove a proposal from a bundle:

1. Open the proposal.
2. Click the **Unbundle** button in the Actions menu.
3. Confirm the change. The proposal will return to a standalone state and can be re-bundled later if needed.



Bundle Display Options

Original Layout: Tabs

When the customer receives the proposal bundle, it works the same as if they were just receiving a single proposal. The difference is they will now see tabs and the title for each proposal in the bundle. The default proposal will be shown and selected automatically. They can then tap on a different tab to see the other proposals in the bundle. The active bundle will be highlighted with bold text and an underline.

As they click from proposal to proposal, the total at the top will be updated. ServiceMinder records a "view" event for each proposal viewed in the bundle, so you'll be able to tell which proposal they may be more interested in.

Gold Package Silver Package Bronze Package					
Item	Description	Area	Test Checkbox	Qty	Amount
Installation	System installation, as designed.			1	\$5,000.00
				Subtotal	\$5,000.00
				Tax	\$0.00
				Total	\$5,000.00

When they are ready to accept, it works just like a standalone proposal. They will choose what options they want, enter an offer code if available or select a payment plan (which may also apply an offer code). They'll then sign and enter payment info (if required). You'll then receive a notification indicating which proposal they accepted. In addition, the bundle will be re-arranged so the selected proposal is now the default one.

New Layout: Cards

Each proposal in the bundle will be it's own "Card", and the one currently being viewed will be highlighted in color:

Gold Package	Silver Package	Bronze Package
Installation System installation, as designed. Deposit Due: \$5,000.00 Select	Installation System installation, as designed. Deposit Due: \$3,500.00 Select	Installation System installation, as designed. Deposit Due: \$2,000.00 Select

The customer will click "select" to see that particular proposal's details below the cards. Note that there's a title, a description and total displayed on the Cards.

Adjusting the Display

To switch between the **Tab** and **Card** views, go to **Control Panel > Proposals > Presentation section**, and turn on the Card View setting.

The box below, titled **Bundle Cards Template**, allows you to use [Shortcodes](#) and Markdown to customize what displays in each card. This only applies to the Card layout.

Display Proposal Bundles as Cards ☒ Display bundled proposals as selectable cards with summary

Bundle Cards Template

```

##{service.name}
{service.description}
Deposit Due: {proposal.deposit_amount}

```

How can I bundle more than two proposals together?

The best workflow is to create all of the proposals first, then hit **Bundle**. The system does **not** support bundling existing bundles together; only individual proposals can be added to a bundle. To avoid confusion, give each proposal a **unique title** before bundling.
