Proposal Bundling

03/28/2025 5:17 pm CDT

Overview

Use **Proposal Bundling** to combine multiple proposals into a single offer for a customer. This is used for scenarios where you want to present a "pick one of" type scenario to the customer. It's also a way to present multiple services to the customer and have them choose one.

For instance, you can provide 2 proposals for window installation. The first proposal in the bundle is the minimal work that needs to be done option and the second proposal in the bundle is "what we recommend for best performance". It may be a little more expensive but it will be a better value for them overtime if they also include weather stripping or use the higher-quality windows, etc.

Video Tutorial

Your browser does not support HTML5 video.

What is a Bundle?

A proposal Bundle contains multiple proposals for the same contact. With Bundling, it's a "pick one proposal out of many" - different from Options, where a contact may choose one, none or multiple options.

To get started, at least two proposals for a contact must be created, and then bundled together. A user can choose the "Bundle new" icon option on an existing proposal to add a new proposal to a bundle (or create a bundle.)

Proposal bundles have a default or primary proposal in the bundle. This is the one that customers will see first-inline. While a user *can* change which proposal is the default one, it's usually easiest to create the primary one first.

The Proposal Title and total is what the customer will see on the Tab when they are viewing the tabs (old style.) Using the new "Card" layout will present not just the title and total, but also a description and a cleaner interface (new style.)

Bundling Proposals

Once you've created your second proposal, you'll see a **Bundle Add** button in the menu strip. That will only show up when there are other open proposals for the same contact. Click that and you'll be presented with a list of other proposals you can add this proposal to in order to either make a bundle or add to an existing bundle. The default proposals for a bundle will be shown with an asterisk (*) next to them. The title is included in the list to make it easier to select the right one.



When you choose "Bundle", you'll be presented with a list of available open proposals for that contact. Choose one or several to add to the bundle:

Bundle	with Proposal	
	Existing Proposals	Multi-select bundle test 1 - \$600 Multi select bundle test 2 - \$600 Multi select bundle test 3 - \$1,200

You can also add a bundle directly in an open proposal by clicking the "**Bundle new...**" tab. This opens what looks like another new proposal that you can create as an alternate option in the proposal.

Customer Notes				
This is o	a basic installation with	h all the basic stuffs.		
Bas	ic Install - \$2,405	Bundle new		
ī	Option	Item		

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Each proposal in the bundle is still behaves like a regular standalone proposal. You can set separate options, offer code and payment options for each proposal in the bundle. It's up to you how you want to structure each one.

If the proposal you're viewing is part of a bundle, you'll see tabs that allow you to flip back and forth between the options. The active bundle will be in bold with a white background.



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

ltem	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:



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

Unbundling Proposals

Any proposal that is a part of a bundle will have a **Unbundle** button in the menu strip. Just click that and confirm to remove that proposal from the bundle. It will then be a stand alone proposal. You can add it to another bundle or just treat it separately.



Reporting For Better Close Rate

Bundled proposals count as one proposal. If you send 3 separate proposals because the customer is considering 3 completely different directions, that will count as 3 proposals and if they choose one, you've got a close rate of 33%.

However, if you bundle them, that counts as one proposal and no matter which one they choose, as long as they accept one, your close rate will be 100%.

Troubleshooting

For some reason, I can only bundle 2 proposals - not 3. The option to bundle goes away.

The reason it is working this way is that they're bundling too early. Right now they're creating a copy, bundling the two, then creating another single copy. There's no **Bundle** option on the copy because there's no other single proposal. The Bundle option shows up if the contact has at least one other *single* (open) proposal.

The best workflow is to create all of the copies first, then hit **Bundle**. You can select more than one to bundle together, so it doesn't add any work or clicks.

The important factor is that the bundle option will only select individual proposals. The system will not allow for bundling bundles together. So if you have two already-bundled proposals and you want to bundle a third, you have to do that from the page with the already-bundled proposals and select the individual third proposal instead of the other way around.

* Example Service 2 - \$178 Example Service - \$74 Bundle new...

17	ltem	Description		Qty	Rate	Amount	
	Example Service	Example Service			1	0.00	\$0.00
	Test Part 1	Test Part 1 Description			2	24.00	\$48.00
	Test Part 2	Test Part 2 Description			2	50.00	\$100.00
	Test Part 3	Test Part 3 Description			2	15.00	\$30.00
Versions <u>1</u>						Subtotal	\$178.00
						Тах	\$0.00
						Total	\$178.00
	(s	end Add Deposit Invoice	Add Task Check)	dle Copy		

One way to make sure they know which proposals to select and bundle is to give them unique titles:

#	Date	Service	Status	Title	Total	Owner
Accept Edit	5/23/2024	Example Service	Open	Example Service	\$74.00	Katie Hamsmith
Accept Edit	<u>5/23/2024</u>	Example Service	Open	Example Service 2	\$178.00	Katie Hamsmith
<u>Accept</u> <u>Edit</u>	<u>5/23/2024</u>	Example Service	Open	Example Service	\$195.00	Katie Hamsmith

The other option is to create all copies and bundle them together at the end (this is also easier when giving unique titles):

Bundle with Proposal	
Existing Proposals	Example Service 2 - \$178 Example Service 3 - \$195