

## How to Determine Which Products a Customer Has Purchased/Should Have Access To

1. Begin by locating the customer's contact record in Infusionsoft. If a customer has more than one contact record, first merge the contacts (see, "How to Merge Contacts in Infusionsoft").
2. On the "General" tab, locate the section labeled "Tags." Click **Show all Tags**, located to the right of this section.

**Tags** Showing 10 of 58

Show all Tags

• Trigger: Send Dou...	ManyChat	10/10/18
• Send AMPLIFY Earl...	Manifesting Works...	9/29/18
• !!Temp Tag>Ope...	No Category	9/16/18
• Trigger: Manifest...	ManyChat	9/15/18
• Received The Mani...	Email	9/11/18
• ManyChat Workshop...	Manifesting Works...	9/7/18
• Early Registratio...	Manifesting Works...	9/7/18
• LM: The Manifesti...	Manifesting Works...	9/7/18
• Opt-in Workshop R...	Manifesting Works...	9/7/18
• The Manifesting G...	Email Clicks	9/4/18

3. When the page loads, the tags listed will allow you to determine which products and memberships the customer has purchased and should have access to. Press **Ctrl + F** on your keyboard to search for the product you wish to see if the customer has purchased.

Here are some terms you can use to search for various products:

- a. Ancient Manifesting Ritual: Search for, "[Course Access] Ancient Manifesting Ritual"
- b. Life-Changing Miracle of Decluttering: Search for, "[Course Access] Life Changing Miracle"
- c. Complete Manifest Course: Search for, "[Course Access] Complete Manifest Course"
- d. Adventures in Manifesting Books: Search for, "Grant AIM Access"
- e. Manifesting Academy: Search for, "[Membership Level Access] Manifesting Academy Membership"
  - i. *Note*: Be sure to also search to make sure there is no tag showing "SUSP" or "CANC" for the Manifesting Academy, as the presence of these tags **might** mean that their subscription is not current. Continue to Step 4 to confirm.

4. To look up subscriptions, return to the previous page. About halfway down the page, click on **Orders**, and scroll until you see the “Subscriptions” area.



Figure 1. Click on “Orders”

Subscriptions										<a href="#">Add Subscription</a>	
View	Qty	Start Date	Bill Amt	Auto\$	Status	Cycle	Next Bill	Credits			
<a href="#">The Manifesting Academy - Monthly - \$37.33</a>		1	7/12/2018	\$37.33	No	Inactive	Month	8/16/2018	0		

Figure 2. A View of the Subscriptions the Customer has.

- Under “Auto\$”, “No” means that the customer will not be auto-billed for the subscription. “Yes” means that the customer will be auto-billed for the subscription.
- Under “Status”, “Inactive” means that their subscription is NOT active and/or current. “Active” means that the subscription is active and/or current.
- If there is a discrepancy or confusion on whether a customer has an active subscription or not, you **must** look at the combination of what it says under the Subscription section, and what Tags are listed on a customer’s account, to determine whether the customer should have access or not.