

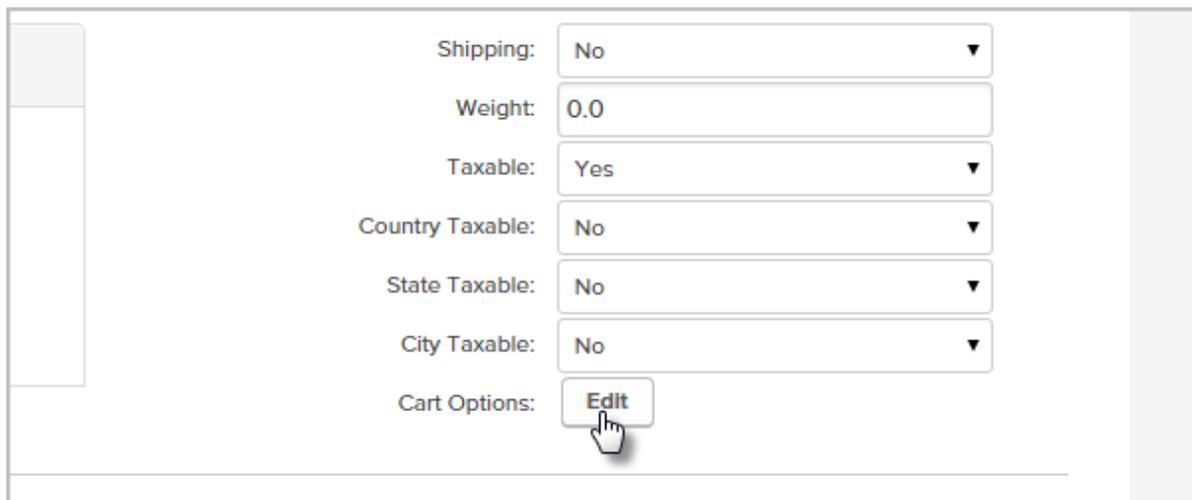
One Click Upsell After A Purchase🔗

There are two methods for creating a one-click upsell after a purchase is made:

- You can purchase a one-click upsell add-on product from one of our marketplace vendors. [Click this link](#) to view all one-click upsell addons.
- Follow the instructions in this article. Please note that setting up a one-click upsell after a purchase is made is not an inherent feature in Infusionsoft and requires more intensive setup procedures

Please Note! This does not work for PayPal orders. This only works with Order Forms.

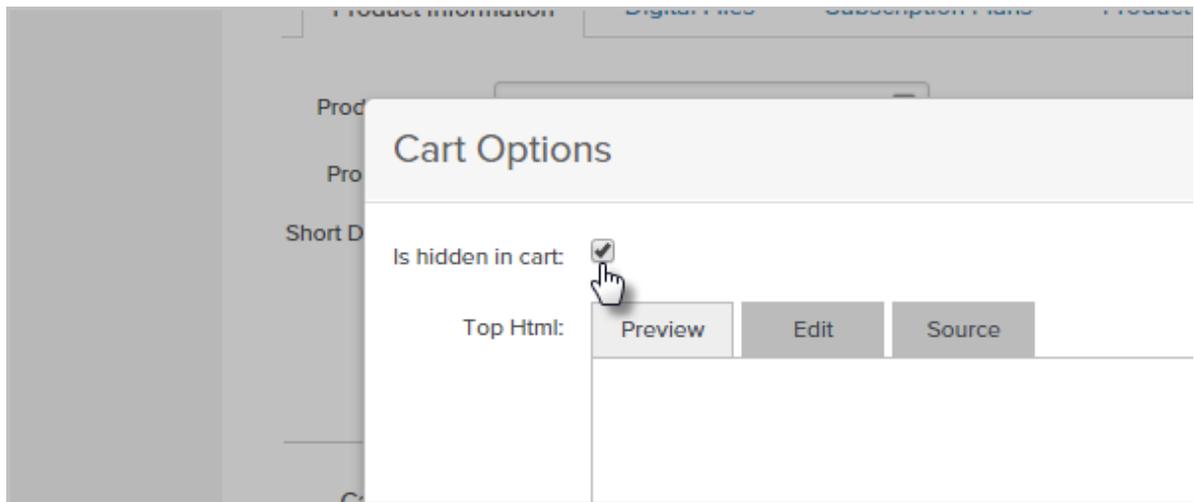
1. First, create all of the necessary products (including the upsell product.) You can reference [this article](#) to walk you through the process. If you use the shopping cart storefront, you may want to make your upsell product hidden. To do this, click the **Edit** button on the Product Information tab



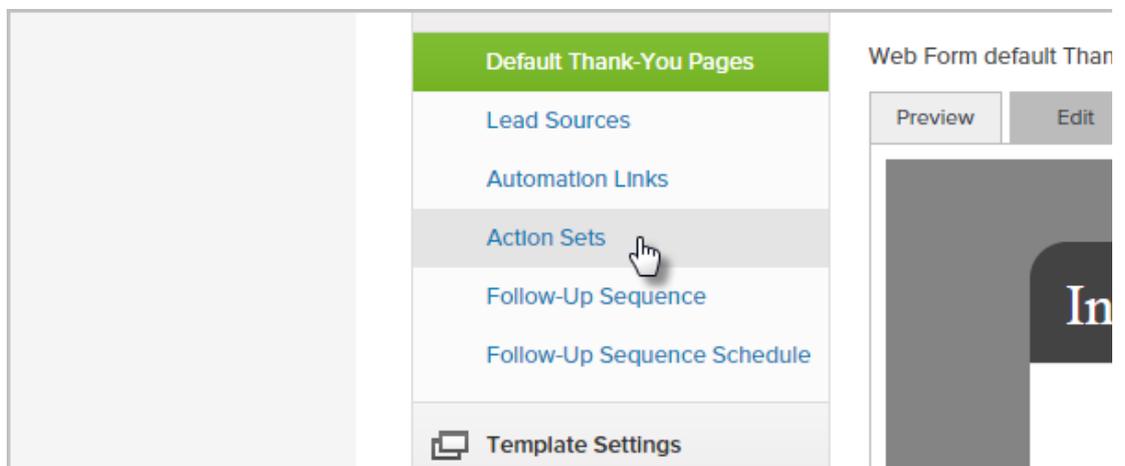
The screenshot shows a form with the following fields and values:

Shipping:	No
Weight:	0.0
Taxable:	Yes
Country Taxable:	No
State Taxable:	No
City Taxable:	No
Cart Options:	Edit

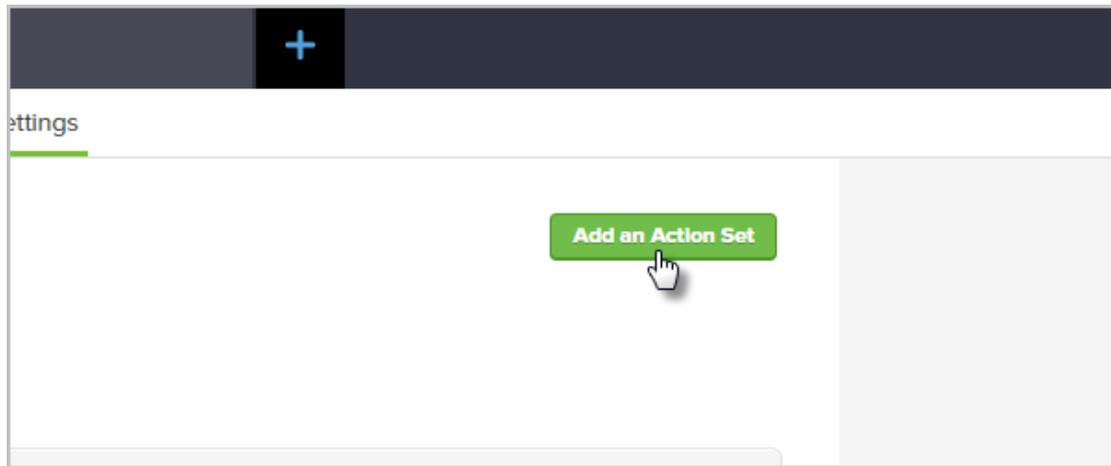
Then check the **Is hidden in cart** box.



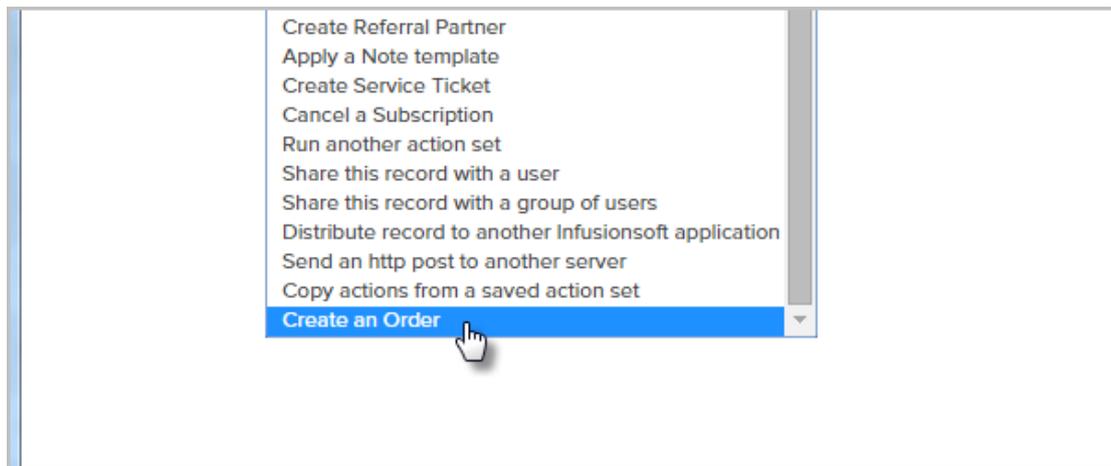
2. Set up the order form for the initial purchase. If you need help setting up an order form, [click here](#) . Those articles have setup videos that will show you how to set up an order form and order form theme.
3. Set up the legacy action set that will create the order. This is a legacy feature and is not documented in the Help Center. Below you'll find step-by-step instructions.
 1. Go to **Marketing > Settings**
 2. Click **Action Sets**



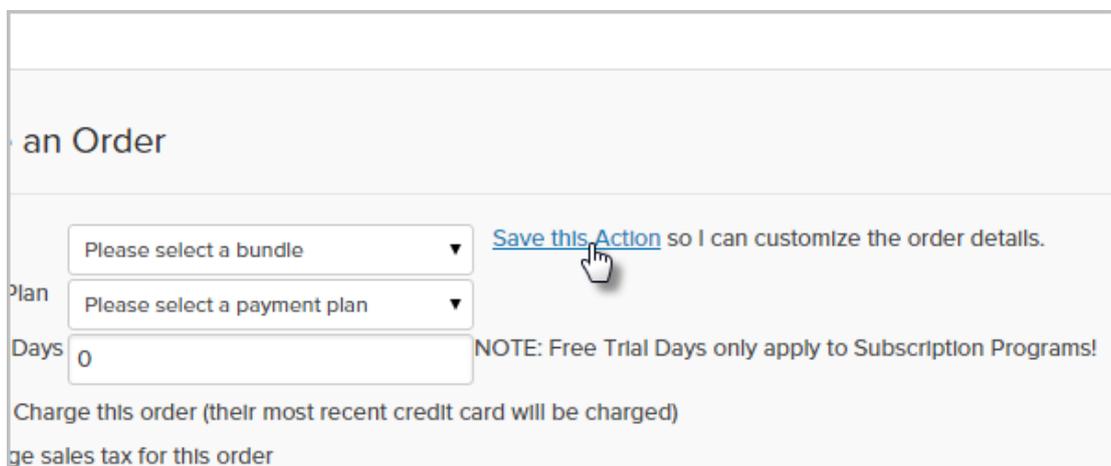
3. Click **Add an Action Set**



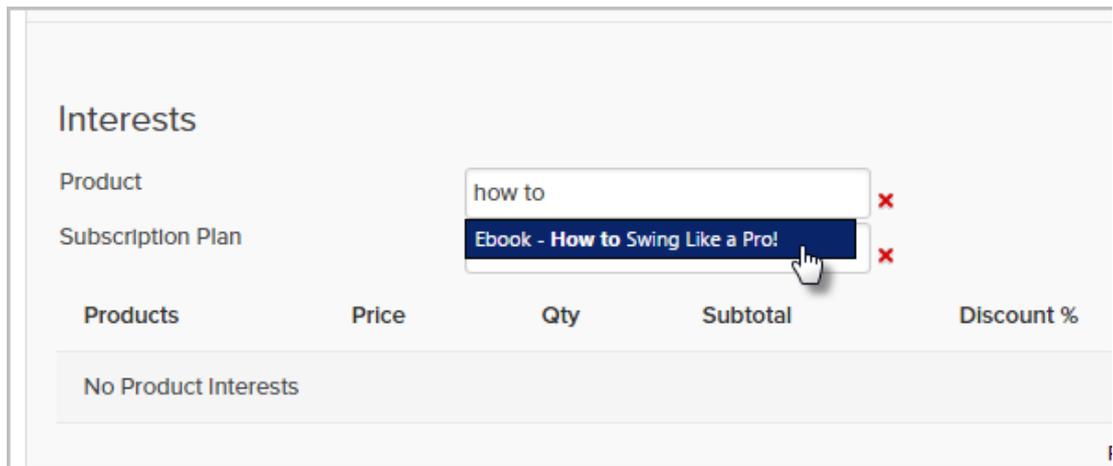
4. Name the Action Set whatever you wish (e.g., "Upsell Purchase")
5. Select the **Create an Order** action from the drop-down (it's the last option in the menu)



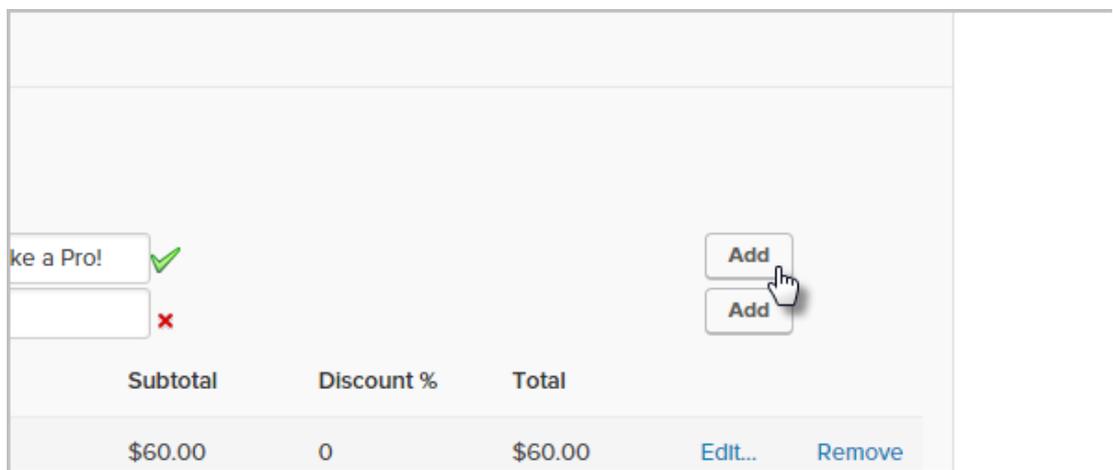
6. Click the **Save this Action** link.



7. Start typing the name of the product and select it from the drop-down.

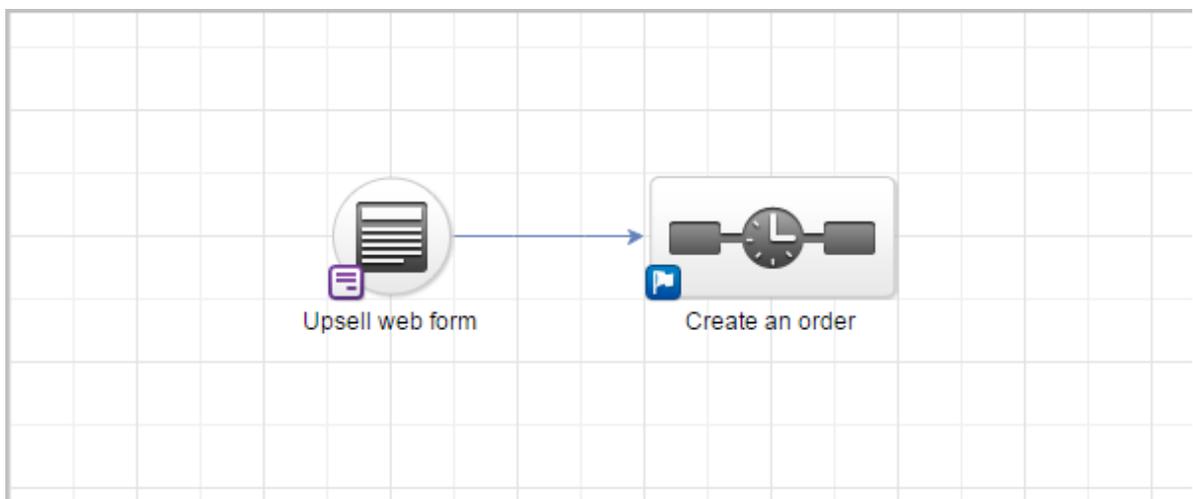


8. Click **Add** next to the product

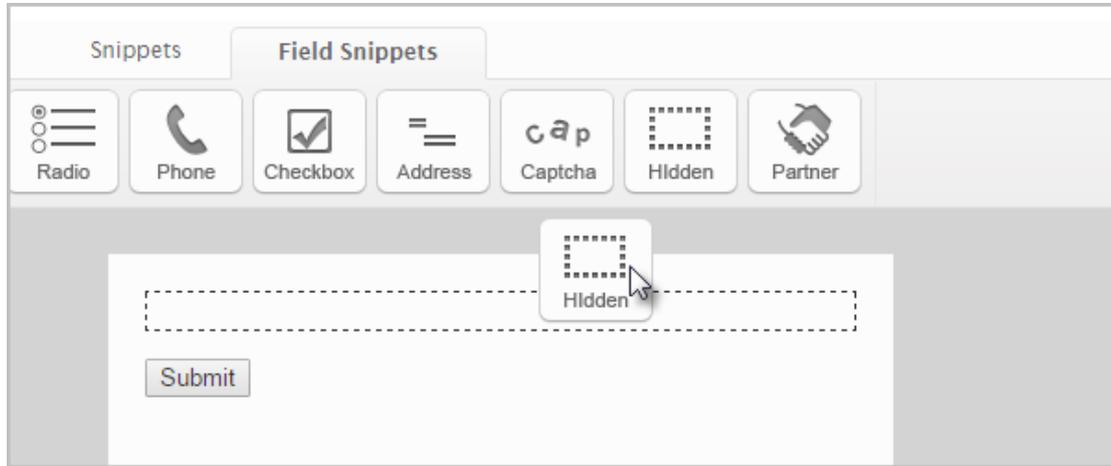


9. Click **Save**, then **Save** again

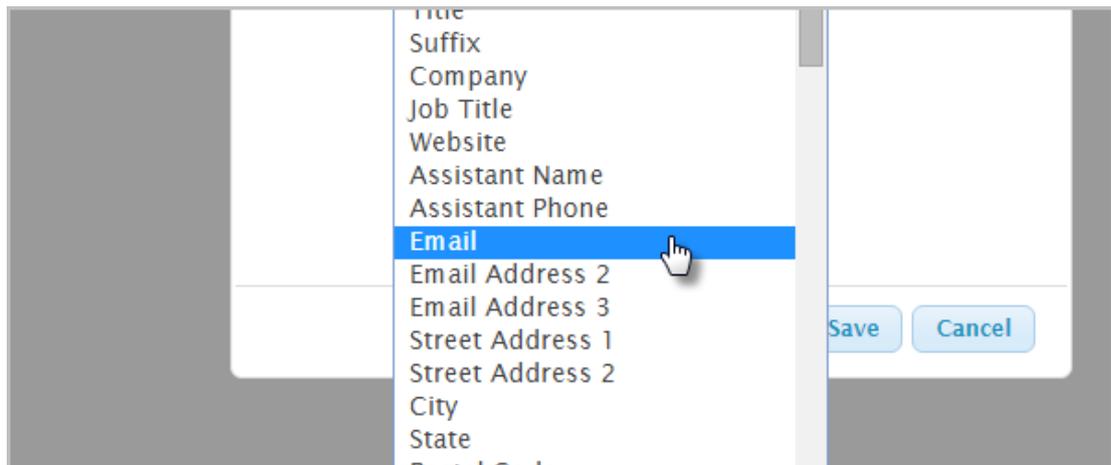
4. Create a new campaign. You can name it "Upsell Campaign" if you wish. The campaign will only need a web form goal attached to a campaign sequence as shown below:



5. Configure the web form following the steps below. Note that this form will only contain one hidden email address field
 1. Delete all default fields on the form so that you only have a *Submit* button
 2. Click on the **Field Snippets** tab and drag a **Hidden** object onto the form



3. Select **Email** from the drop-down and click **Save**.



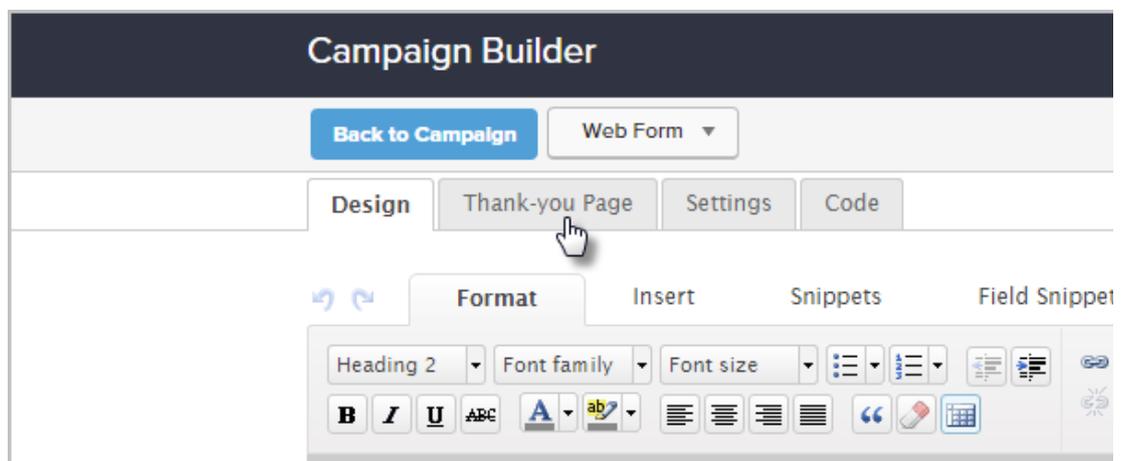
4. Now, modify the web form to look like an upsell. In the example below, I added a paragraph snippet to the form, then inserted a 2X1 table into the paragraph with an image on the left and a description on the right.



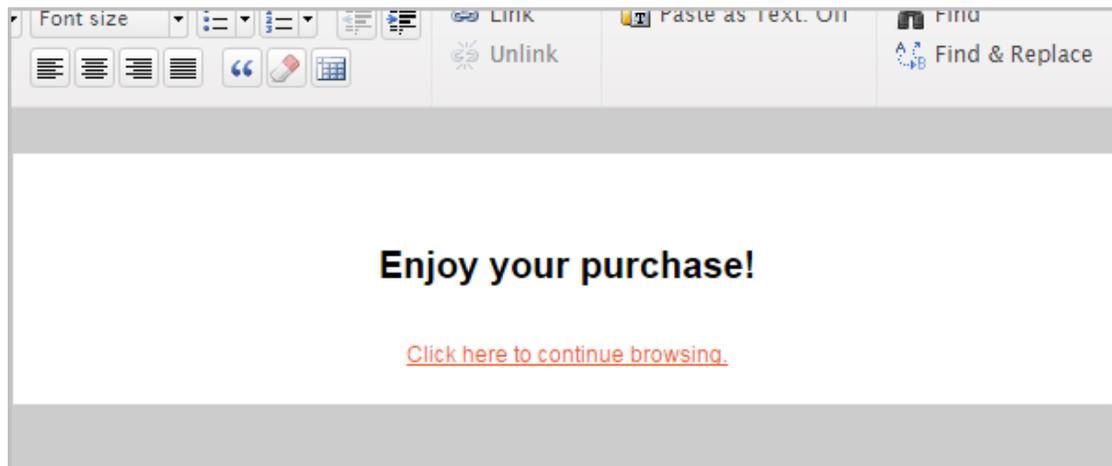
5. Modify the submit button to be the purchase button. I changed the text to "Add to Order" as seen above.

Please Note! This will only work when using the Infusionsoft hosted version of the web form. The web form can be added to your web site and hosted by you using the HTML or JavaScript embed code, but doing this requires that custom code be added to your web site that auto populates the hidden fields for email address so the web form can identify who to add the order to. This custom code is not provided by Infusionsoft.

6. Configure the Thank You page to thank the customer for purchasing the upsell
 1. Click the Thank-You page tab

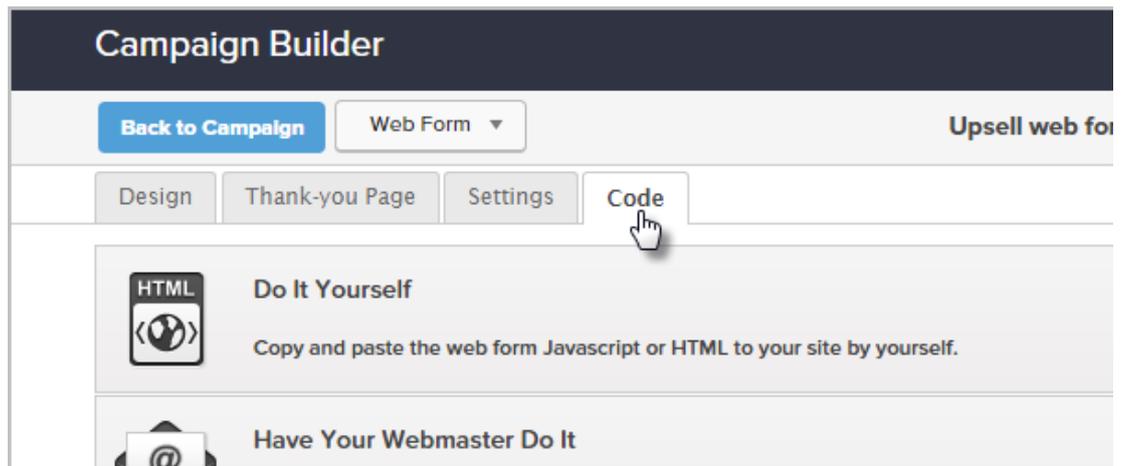


2. Style the page as you wish

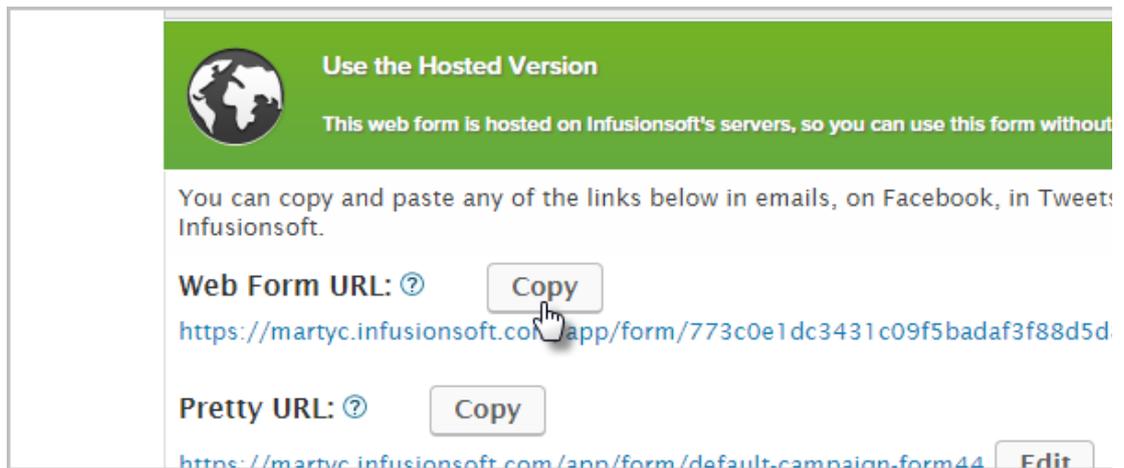


3. Now, grab the URL of the web form. We will need it for later.

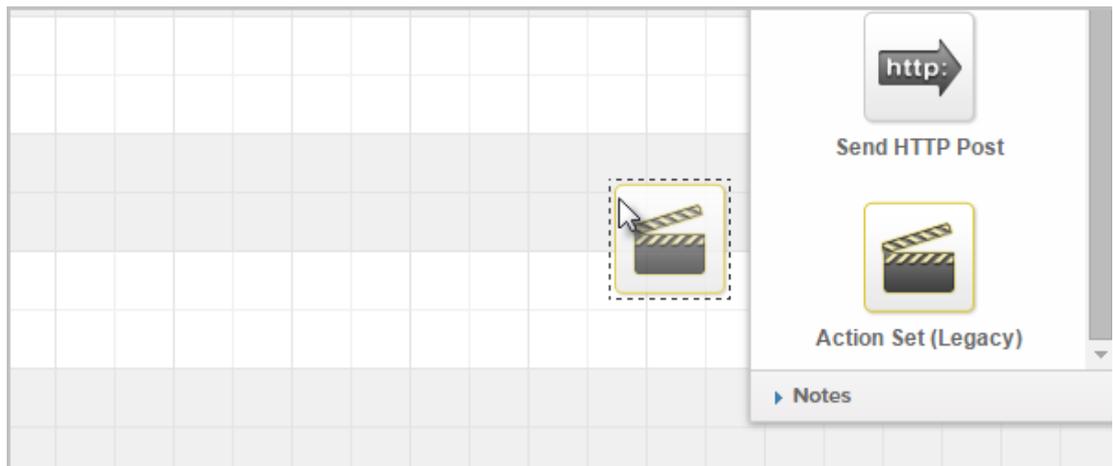
4. Click on the Code tab



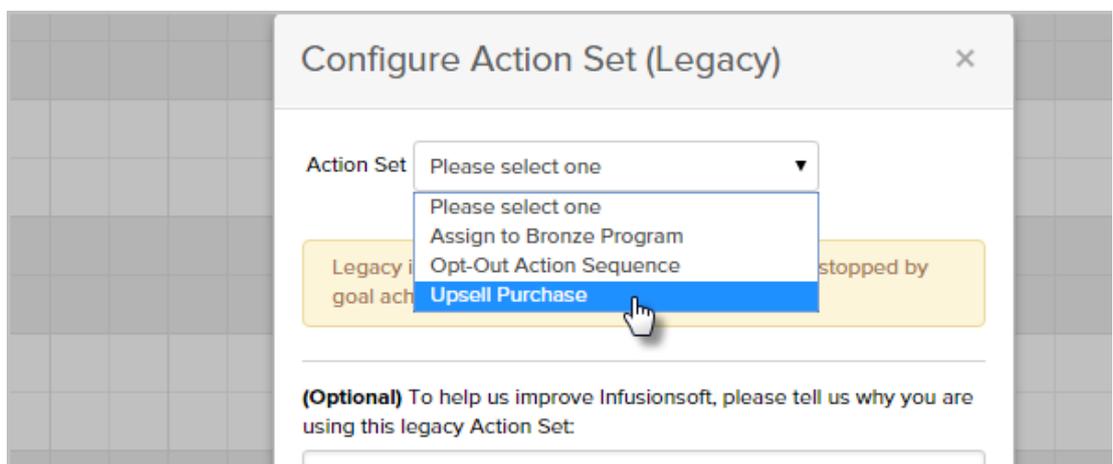
5. Click on **Use the Hosted Version**, then copy the url. Paste it somewhere so that you can get to it later (like Notepad or TextEdit...or just paste it in a new web browser tab for now.)



7. Now, let's configure the connecting sequence to create an order when the form is submitted
 1. Double-click the sequence to set it up
 2. Drag an **Action Set (Legacy)** object onto the sequence canvas to the right of the **Start** icon.



3. Double-click the **Action Set (Legacy)** object and select the action you created earlier that creates the order.

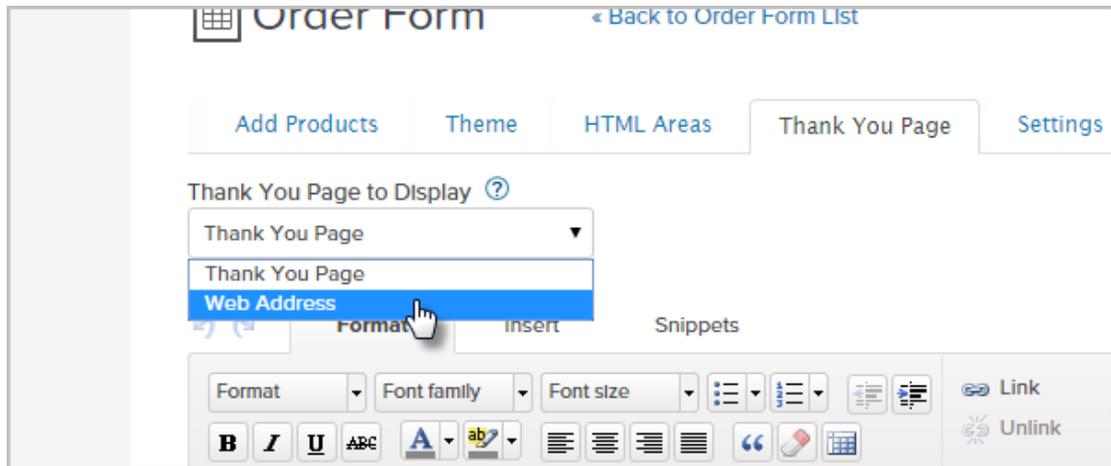


4. Click **Save**

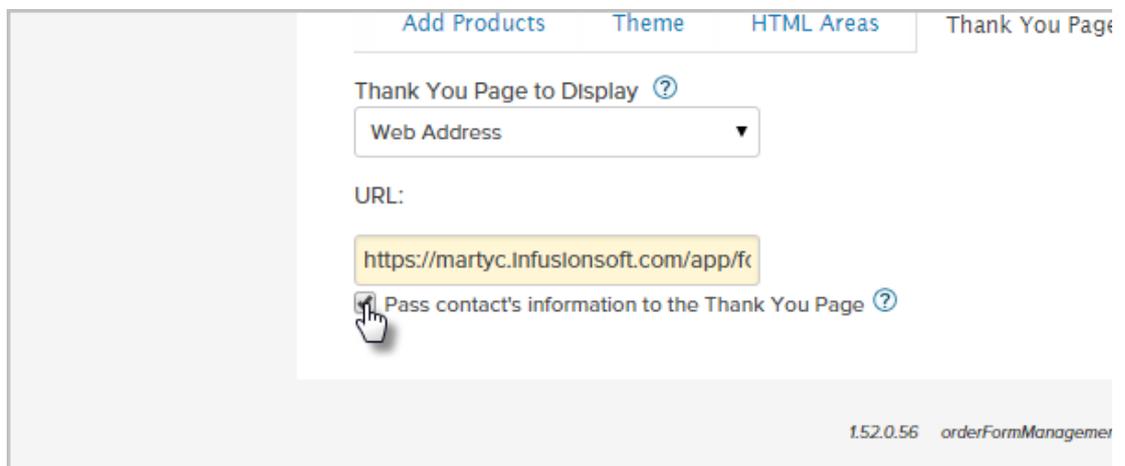
8. You're almost done! Set all the campaign objects to Ready and **Publish** it.

9. Go back to the order form you created in step 2

1. Click on the **Thank You** page tab, then change the drop-down to **Web Address**



2. Paste the web form URL you copied earlier into the text field.



3. Make sure to check the box, "Pass contact's information to the Thank You Page". If this checkbox is not selected, the upsell won't work!

4. Click **Save**

10. You're done! Test out the order form and see it in action.