One Click Upsell After A Purchases

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.

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

Shipping:	No	
Weight:	0.0	
Taxable:	Yes 🔻	
Country Taxable:	No	
State Taxable:	No v	
City Taxable:	No v	
Cart Options:	Edit	
	5	

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

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Proc	Cart Optior	าร		_	
Short D	ls hidden in cart:	- Chm			
	Top Html:	Preview	Edit	Source	

- 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

Default Thank-You Pages	Web Form default Than
Lead Sources	Preview Edit
Automation Links	
Action Sets الس	
Follow-Up Sequence	In
Follow-Up Sequence Schedule	
Template Settings	

3. Click Add an Action Set

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ettings				
		Add an Action Set	3	

- 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.

Interests				
Product		how to		×
Subscription Plan		Ebook - How to S	wing Like a Pro!	×
Products	Price	Qty	Subtotal	Discount
No Product Interes	sts			

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

ke a Prol				Add	
	×			Add	
	Subtotal	Discount %	Total		
	\$60.00	0	\$60.00	Edit	Remove

- 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

Snippets	Field Snippets		
Radio	Checkbox =	cap Captcha Hidden Partner	
Submi	it	Hidden	

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

Suffix Company Job Title Website Assistant Name Assistant Phone	
Email Address 2 Email Address 3 Street Address 1 Street Address 2 City State	Save Cancel

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 you 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

Campa	ign Builder			
Back to C	Campaign Web F	Form 🔻		
Design	Thank-you Page	Settings	Code	
5	Format In	nsert	Snippets	Field Snippet
Heading B Z	2 • Font family • <u>U</u> ABC <u>A</u> • <u>aby</u> •	Font size	• = • <u>}</u> = •	**************************************

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

Campaiç	gn Builder	
Back to Ca	ampaign Web Form 🔻	Upsell web for
Design	Thank-you Page Settings Code	
HTML	Do It Yourself	
	Copy and paste the web form Javascript or HTML to your site by yourself	l.
	Have Your Webmaster Do It	

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.)

	Use the Hosted Version This web form is hosted on Infusionsoft's servers, so you can use this form without
You can co Infusionso	py and paste any of the links below in emails, on Facebook, in Tweets
Web Forr https://ma	n URL: ⑦ Copy artyc.infusionsoft.co [®] app/form/773c0e1dc3431c09f5badaf3f88d5d
Pretty UF	RL: ⑦ Copy

- 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.

Configure Action Set (Legacy) ×	
Action Set Please select one Please select one Assign to Bronze Program Legacy i Opt-Out Action Sequence goal ach Upsell Purchase Optional) To help us improve Infusionsoft, please tell us why you are using this legacy Action Set:	

- 4. Click Save
- 8. Your 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

	I Oraer Form		« Back to Ord		
A	dd Products	Theme	HTML Areas	Thank You Page	Settings
Thank	You Page to D	Isplay 💿			
Than	k You Page		•		
Than	k You Page				
Web =) (*	Address Format	b inser	τ Snippet	S	
Form	nat - For	nt family 🗸	Font size 🔹 🗄	·⊨· ∰∉	නෙ Link දූදි Unlink

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

Add Products	Theme	HTML Areas	Thank You Page
Thank You Page to D	Isplay 🕐		
Web Address		•	
URL:			
https://martyc.infusio	onsoft.com/app	/fc	
Pass contact's inform	mation to the Th	ank You Page 🕐	
		1.52.0.56	orderFormManagemer

- 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.