## One Click Upsell after a purchase %

This article applies to:

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 add-ons.
- 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 Max Classic 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.

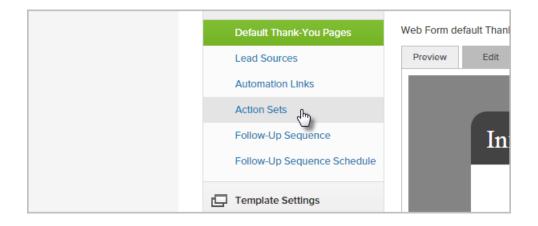
Shipping:	No	
Weight:	0.0	
Taxable:	Yes	
Country Taxable:	No	
State Taxable:	No	
City Taxable:	No	
Cart Options:		

Then check the Is hidden in cart box.

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Pr	Cart Option	ns		_	
Short	D Is hidden in cart: 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.



3. Click Add an Action Set.

	+		
ettings			
		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).

Create Referral Partner
Apply a Note template
Create Service Ticket
Cancel a Subscription
Run another action set
Share this record with a user
Share this record with a group of users
Distribute record to another Infusionsoft application
Send an http post to another server
Copy actions from a saved action set
Create an Order
6)

6. Click the Save this Action link.

an	Order	
	Please select a bundle	Save this Action so I can customize the order details.
Plan	Please select a payment plan	•
Days	0	NOTE: Free Trial Days only apply to Subscription Programs!
Char	ge this order (their most recent cred	it card will be charged)
ge sa	es tax for this order	

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 Interests	3				
					1

8. Click Add next to the product.

ke a Pro!			bbA bbA
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:

	→ ■-₽-■	
Upsell web form	Create an order	

- 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 Snip	pets				
Radio	e Checkbox		<b>с а р</b> Captcha	Hldden	Partner	
Sub	mit		Hidden	ð	]	

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

Suffix Company Job Title Website Assistant Name Assistant Phone	
Email 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.



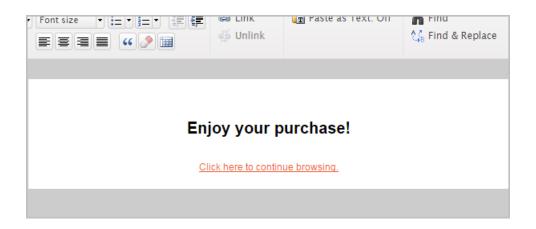
5. Modify the submit button to be the purchase button. I changed the text to "Add to Order" as seen above.

**Please Note!** This will only work when using the Max Classic - 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 Keap.

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

Campaig	n Builder		
Back to Carr	npalgn Web Form	n 🔻	
Design	Thank-you Page	Settings Code	
2 (2)	Format Inse	ert Snippets	Field Snippet
Heading 2		Font size • 📰 • 📰	

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.

Campaig	gn Builder	
Back to Ca	mpalgn Web Form 🔻	Upsell web for
Design	Thank-you Page Settings Code	
	Do It Yourself Copy and paste the web form Javascript or HTML to your site by your	self.
	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	
can copy and paste any of the links below in emails, on Facebook, in Tweets isionsoft.	You can copy Infusionsoft.
b Form URL: @ Copy os://martyc.infusionsoft.co. app/form/773c0e1dc3431c09f5badaf3f88d5d8	Web Form https://mart
etty URL: ⑦ Copy	Pretty URL

- 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.

Action Set (Legacy)		Send HTTP Post
V		State in the out
		Action Set (Legacy)

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.

ШV	raer ra	orm	« Back to Ord	ler Form List	
Add I	Products	Theme	HTML Areas	Thank You Page	e Settings
Thank Yo	ou Page to Di	splay	T		
Thank Yo Web Add	ou Page	m) insen	Snippet	c .	
Format B Z		t family		iel se	<b>නෙ Link</b> දුරු 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 Display 💿	
Web Address 🔻	
URL:	
https://martyc.infusionsoft.com/app/fc	
Pass contact's information to the Thank You Page ②	
1.52.0.56	orderFormManagemen

- 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.