

One Click Upsell after a purchase

This article applies to:

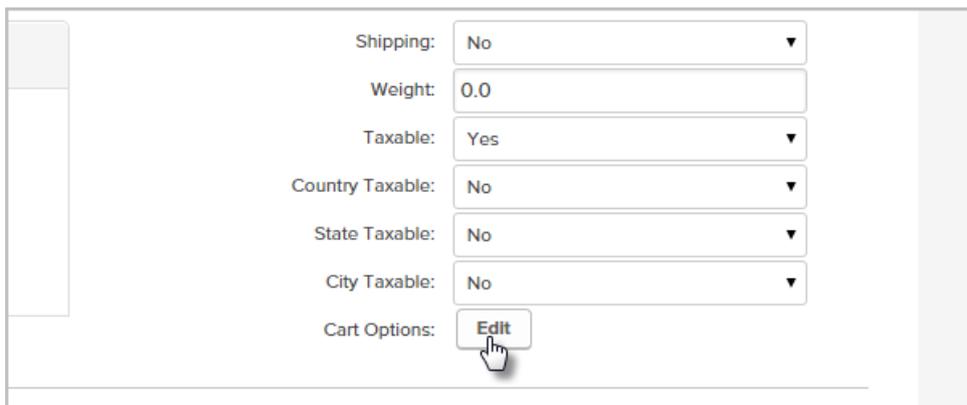
There are two methods for creating a one-click upsell after a purchase is made:

- 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.

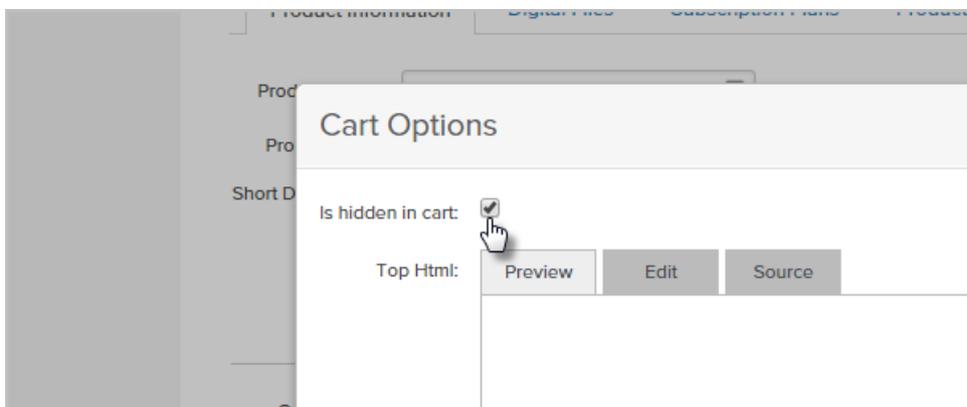
1. First, create all of the necessary products (including the upsell product.) You can reference [this article](#) to walk you through the process. If you use the shopping cart storefront, you may want to make your upsell product hidden.

To do this, click the **Edit** button on the Product Information tab.



A screenshot of the 'Product Information' tab in a product management interface. It shows several settings: 'Shipping:' with a dropdown menu set to 'No'; 'Weight:' with a text input field containing '0.0'; 'Taxable:' with a dropdown menu set to 'Yes'; 'Country Taxable:' with a dropdown menu set to 'No'; 'State Taxable:' with a dropdown menu set to 'No'; and 'City Taxable:' with a dropdown menu set to 'No'. At the bottom, there is a 'Cart Options:' label and an 'Edit' button with a mouse cursor hovering over it.

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

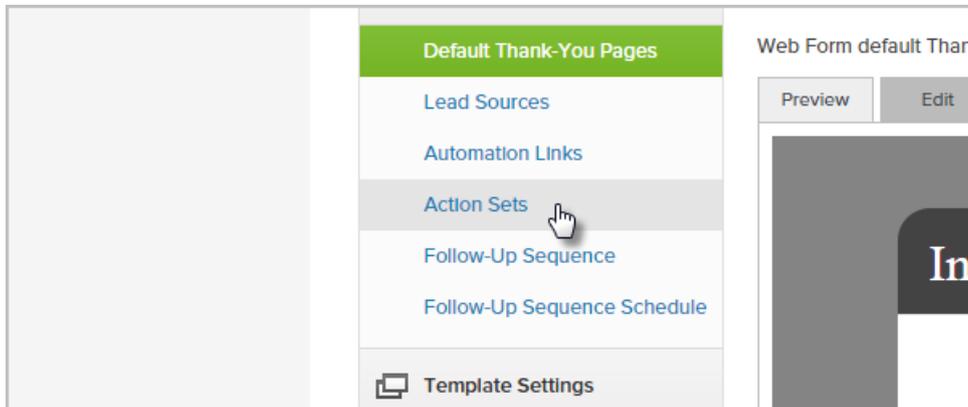


A screenshot of the 'Cart Options' dialog box. The dialog has a title bar 'Cart Options' and a checkbox labeled 'Is hidden in cart:' which is checked. Below the checkbox is a 'Top Html:' label and a text area. To the right of the text area are three buttons: 'Preview', 'Edit', and 'Source'. A mouse cursor is hovering over the 'Is hidden in cart:' checkbox.

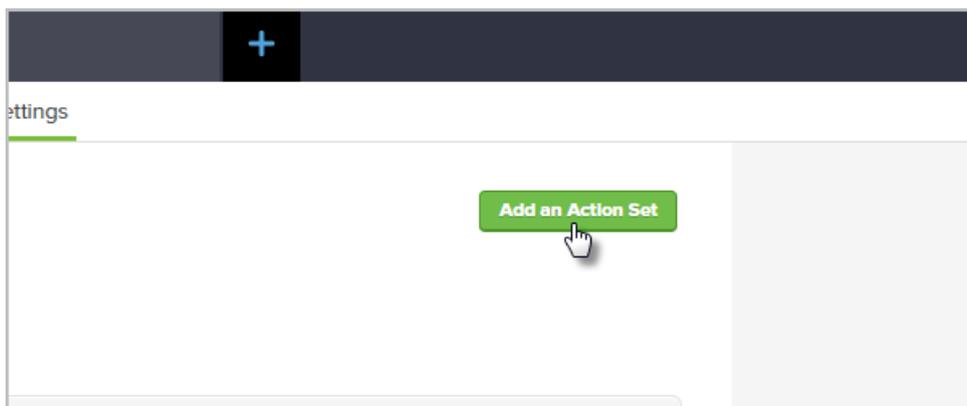
2. Set up the order form for the initial purchase. If you need help setting up an order form, [click here](#). Those articles have setup videos that will show you how to set up an order form and order form theme.

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.

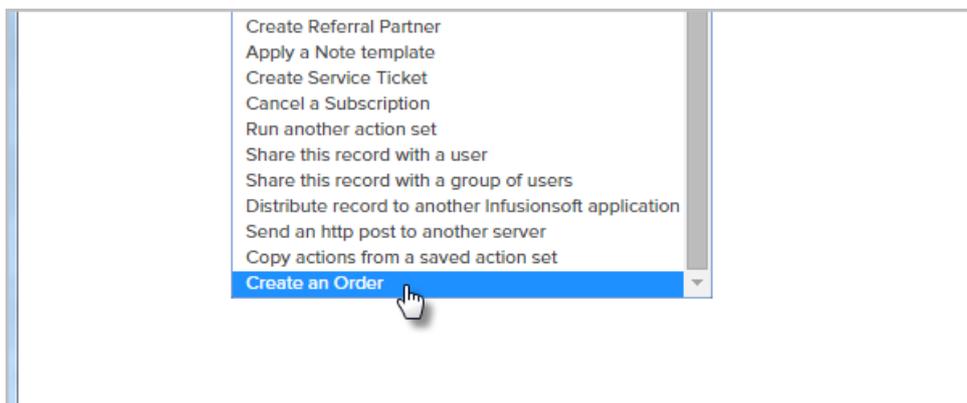
1. Go to **Marketing > Settings**.
2. Click **Action Sets**.



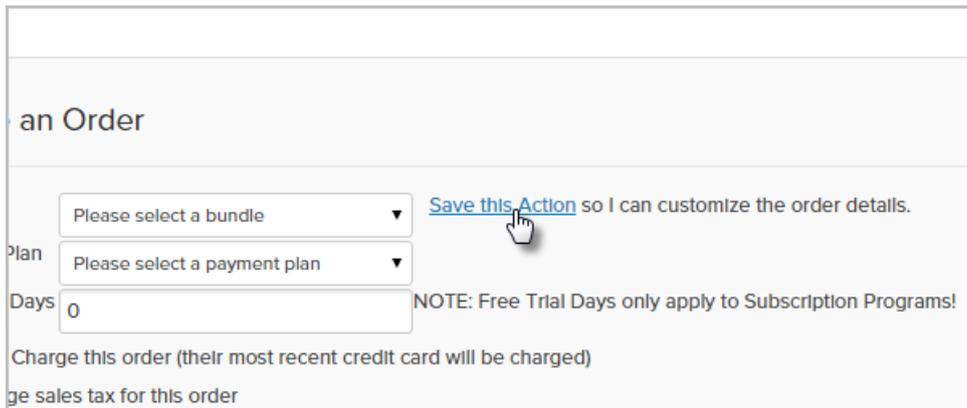
3. Click **Add an Action Set**.



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.



an Order

Please select a bundle [Save this Action](#) so I can customize the order details.

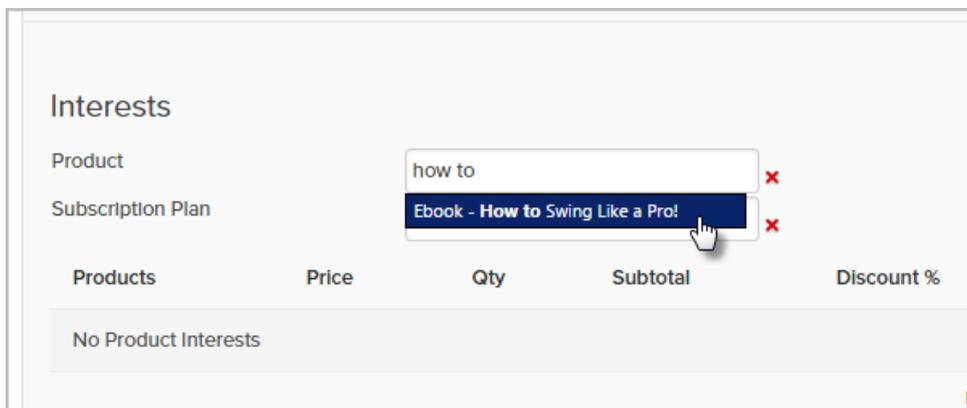
Plan Please select a payment plan

Days NOTE: Free Trial Days only apply to Subscription Programs!

Charge this order (their most recent credit card will be charged)

ge sales tax for this order

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



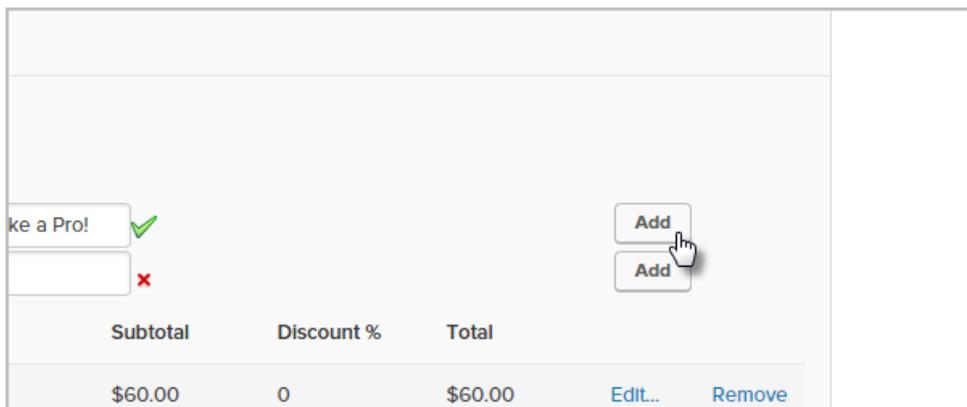
Interests

Product

Subscription Plan

Products	Price	Qty	Subtotal	Discount %
No Product Interests				

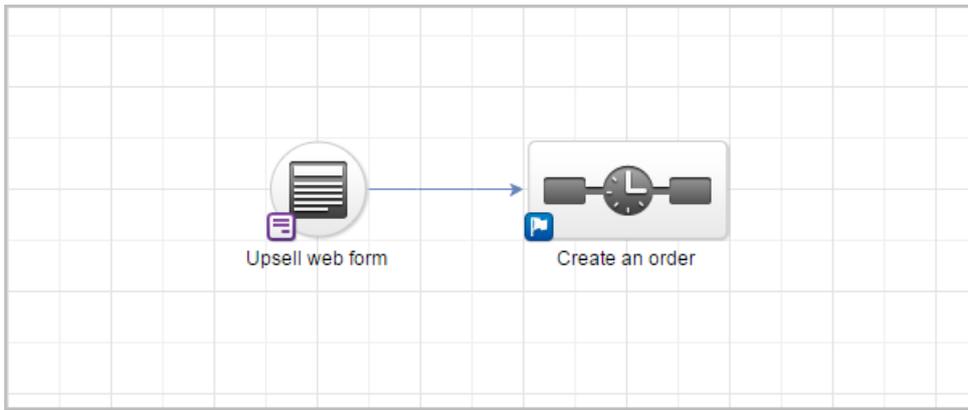
8. Click **Add** next to the product.



ke a Pro! <input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add"/>	<input type="button" value="Add"/>
Subtotal	Discount %	Total	
\$60.00	0	\$60.00	Edit... Remove

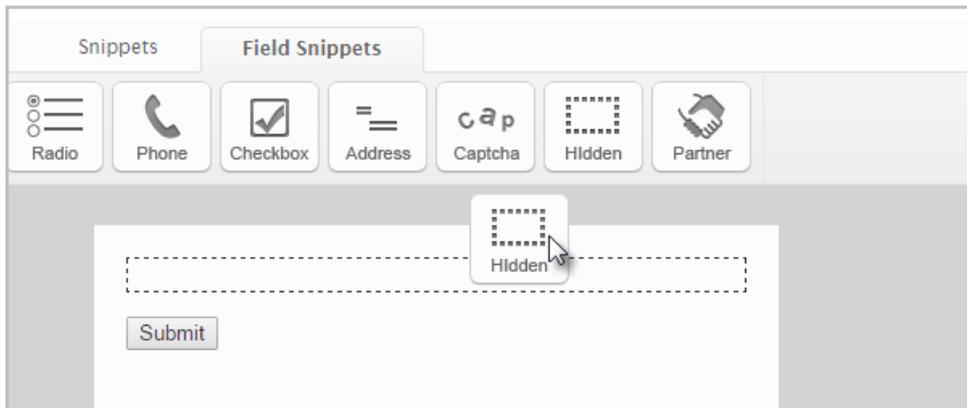
9. Click **Save**, then **Save** again.

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:

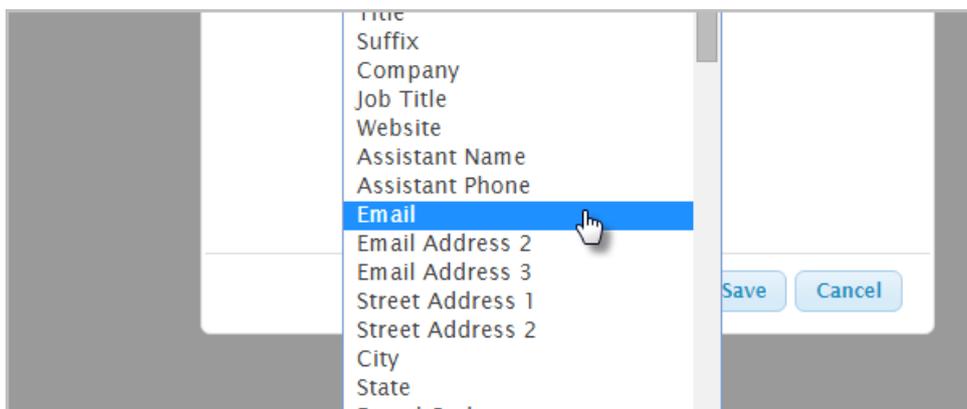


5. Configure the web form following the steps below. Note that this form will only contain one hidden email address field.

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.



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.

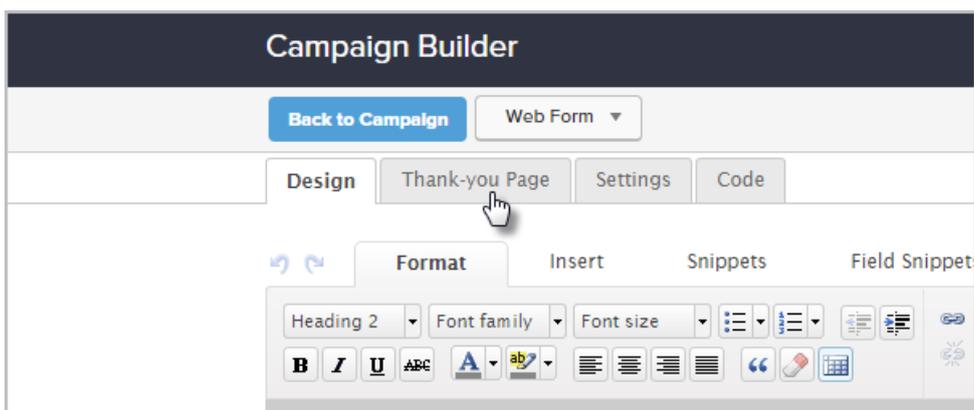


5. Modify the submit button to be the purchase button. I changed the text to "Add to Order" as seen above.

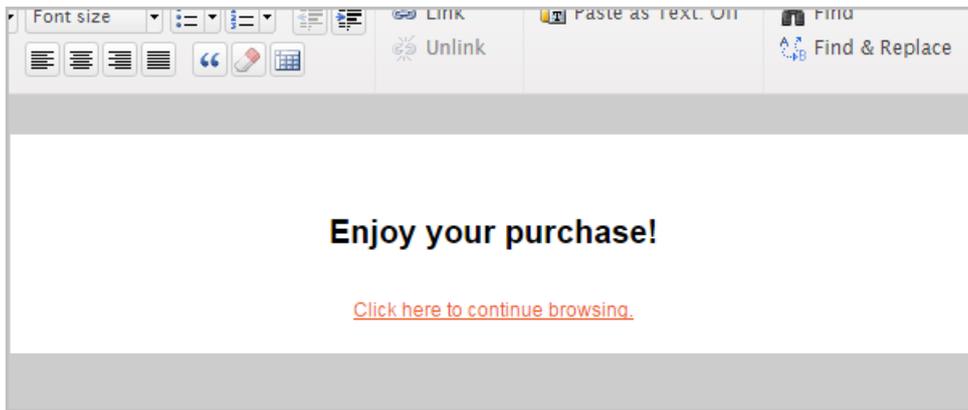
Please Note! This will only work when using the Max Classic - hosted version of the web form. The web form can be added to your web site and hosted by you using the HTML or JavaScript embed code, but doing this requires that custom code be added to your web site that auto populates the hidden fields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

6. Configure the Thank You page to thank the customer for purchasing the upsell.

1. Click the Thank-You page tab.

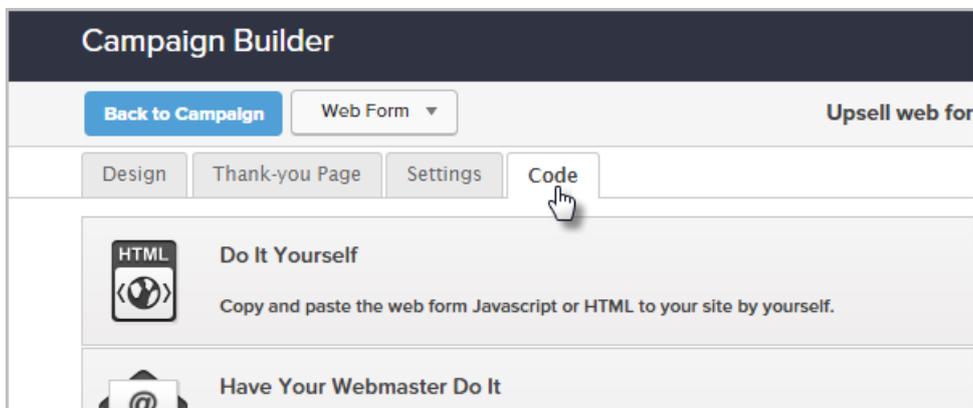


2. Style the page as you wish.

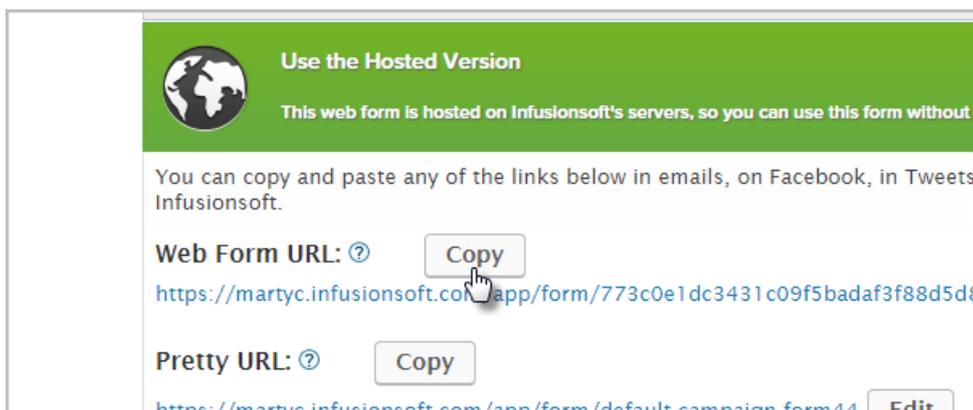


3. Now, grab the URL of the web form. We will need it for later.

4. Click on the **Code** tab.



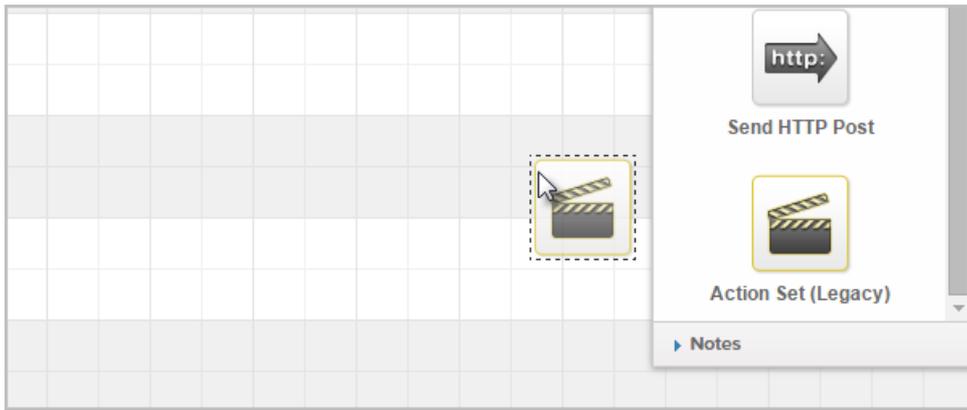
5. Click on **Use the Hosted Version**, then copy the url. Paste it somewhere so that you can get to it later (like Notepad or TextEdit...or just paste it in a new web browser tab for now).



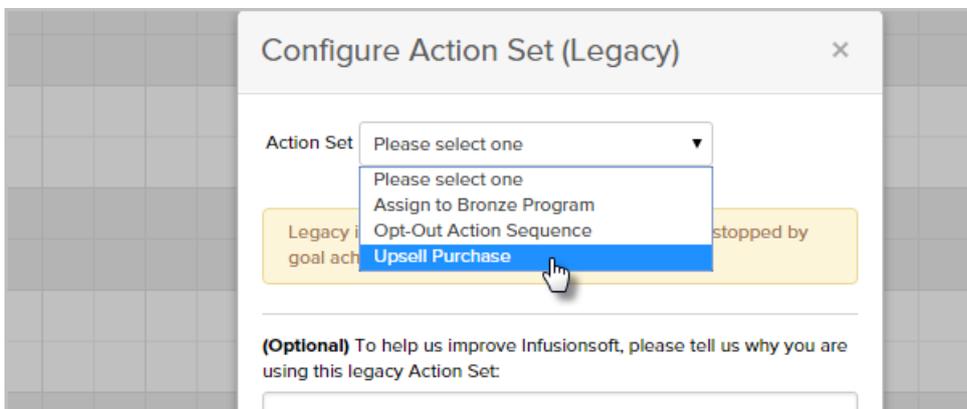
7. Now, let's configure the connecting sequence to create an order when the form is submitted.

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.

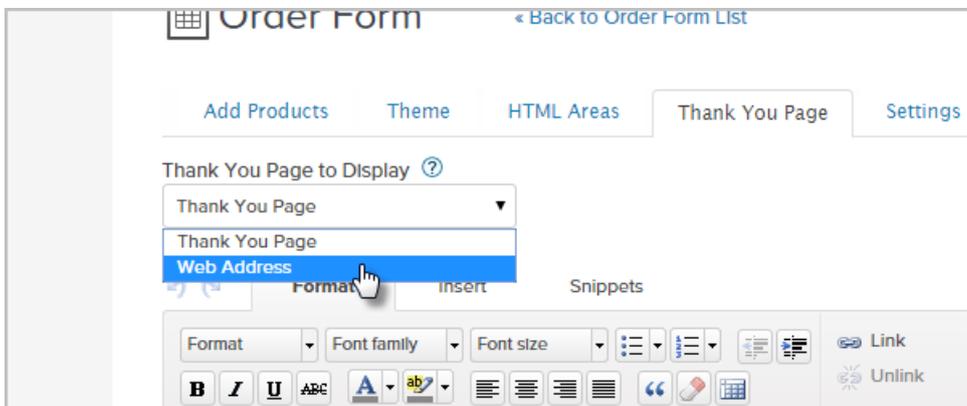


4. Click **Save**.

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.

Add Products Theme HTML Areas Thank You Page

Thank You Page to Display ?
Web Address ▼

URL:
https://martyc.infusionsoft.com/app/fo

Pass contact's information to the Thank You Page ?

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.
