



— **Magento Extension User Guide**

# **POST PURCHASE UPSELLS**

**for Magento 2**



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## Key Features

### Post Purchase Upsells

The post purchase upsell products will be located on the right as soon as the client has completed the previous payment, before getting to the Thank You page.

### Flexible Conditions

By making use of the Post Purchase Upsells extensions, you can develop custom conditions which will only display the vital products to your customers.

### Increase Average Order Value

The extension will help to boost the average revenue by as much as 10%-30%. All the risks are dealt with this extension due to the fact that the customer is already done with his or her order and you simply display some nice products to him or her.

### Purchase the Products in one click

As soon as the customer takes note of the post purchase upsell products, he can include all his preferred products to his latest order without needing to create a separate order.

### Countdown Time

Through the configuration settings of the extension, you can effectively specify the amount of time (minutes) available to a customer to decide on which upsell products to buy.

### Payment Processing

The Post Purchase Upsells extension is compatible with Stripe, Braintree and Paypal.

## Configuration

### General

- **Enabled** - The selection is enabled by selecting Yes.
- **Countdown Time** - Input the countdown time which will provide customers with options to make a selection from within this period.
- **Use Custom Order Status** - Assign "Pending Post Purchase" status to an order while upsells offer is being reviewed by customer.

### General

**Enabled**  
[website]

**Offer Lifetime**  
[website]   
Customer will have to make a decision within this period of time. In minutes.

**Use Custom Order Status**  
[website]   
Assign "Pending Post Purchase" status to an order while upsells offer is being reviewed by customer. The order gets previous status after customer makes a decision. It can be handy for orders not to be collected by 3rd party services before changes.

## Review and Confirmation Popup

- **Enabled** – To enable review and confirmation popup select “Yes”.
- **Description** – Type the description of review and confirmation popup.

### Review and Confirmation Popup

**Enabled**  
[website]

**Description**  
[store view]

## Payment Processing

- **Invoice Comment** – Input an invoice comment.

### Payment Processing

**Invoice Comment**  
[store view]

## Upsell Rule Defaults

- **Upsell Items Count** - You would need to choose the number of upsell items to be displayed before the Thank You page.
- **Allow to Buy Multiple Items** - This election is enabled by selecting Yes.
- **Allowed Max Qty Per Item** - You would need to select the number of items to be selected at once.

### Upsell Rule Defaults

Upsell Items Count  
[store view]

Allow to Buy Multiple Items  
[store view]

Allowed Max Qty Per Item  
[store view]

## Manage Rules

- **Rule name** - Input the name you have selected for the rule.
- **Active** - The activate the rule, you need to select Yes.
- **Websites** - Choose the websites to be affected by the rule.
- **Customer Groups** - Choose the customer groups to be affected by the rule.
- **Priority** - Set the different priority levels of the rule using numbers.

### Rule Information

Rule Name \*

Active

 Yes

Websites \*

Main Website



Customer Groups \*

NOT LOGGED IN

General

Wholesale

Retailer


Priority

Setup a special rule to be used with your post purchase products list.

### When to apply the rule

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

Subtotal greater than 1 



Choose the products to be offered from the list. If you want to select products based on certain conditions, then click on Condition.

### What products to offer

#### Offer Settings

Offer Type \*

- Random
- Related
- Up-Sell
- Cross-Sell
- Most Viewed With
- Most Ordered With
- Random**
- Condition

Complete all the necessary fields available in the Offer settings section:

- **Title** – Input your preferred offer title.
- **Description** – Provide a comprehensive description of the offer.
- **Discount** – Specify the amount of discount for the post purchase products list.
- **Upsells Items Count** – Select the amount of items that will be displayed in the post purchases products section. If you want to make use of the config setting, select the checkbox “use config settings”.
- **Allow to Buy Multiple Items** – In order to enable the options to buy multiple items select Yes. If you want to use config settings, select “use config settings”.
- **Allowed Max Qty Per Item** – Select the specific amount of purchases allowed for each item. If you want to use the config settings, select “use config settings”.
- **Offer Page URL Key** - By default, customers see Up-sells offer on Thank You page. So use it only if you want to show the Up-sells offer on a CMS page. You will have to insert a "Post Purchase Upsells Offer" widget into the CMS page.

### Offer Settings

Title \*

Description \*

Discount Type \*

Discount \*

Upsells Items Count \*   
 Use Config Settings

Allow to Buy Multiple Items \*  Yes  
 Use Config Settings

Allowed Max Qty Per Item \*   
 Use Config Settings

Offer Page Url Key

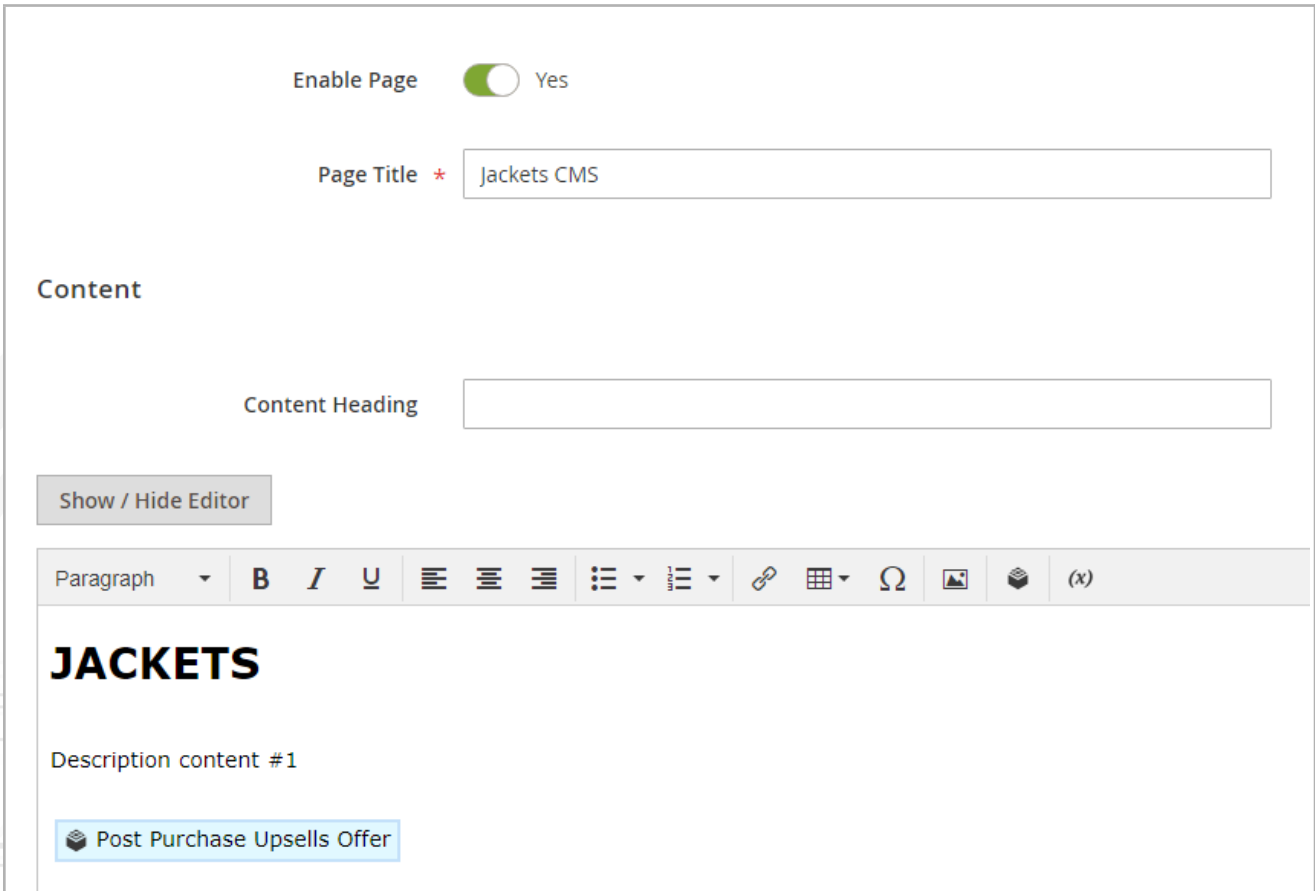
By default, customers see Up-sells offer on Thank You page. So use it only if you want to show the Up-sells offer on a CMS page. You will have to insert a "Post Purchase Upsells Offer" widget into the CMS page.

## Post Purchase Upsells Offer via CMS Page

If you want to show the Up-sells offer on a CMS page go to Pages and create a new CMS page.

Go to **Content > Pages > Add New Page > fill up all necessary fields.**

In the Content section click **"Insert Widget" > select a widget type "Post Purchase Upsells Offer"**



Enable Page  Yes

Page Title \*

**Content**


Content Heading

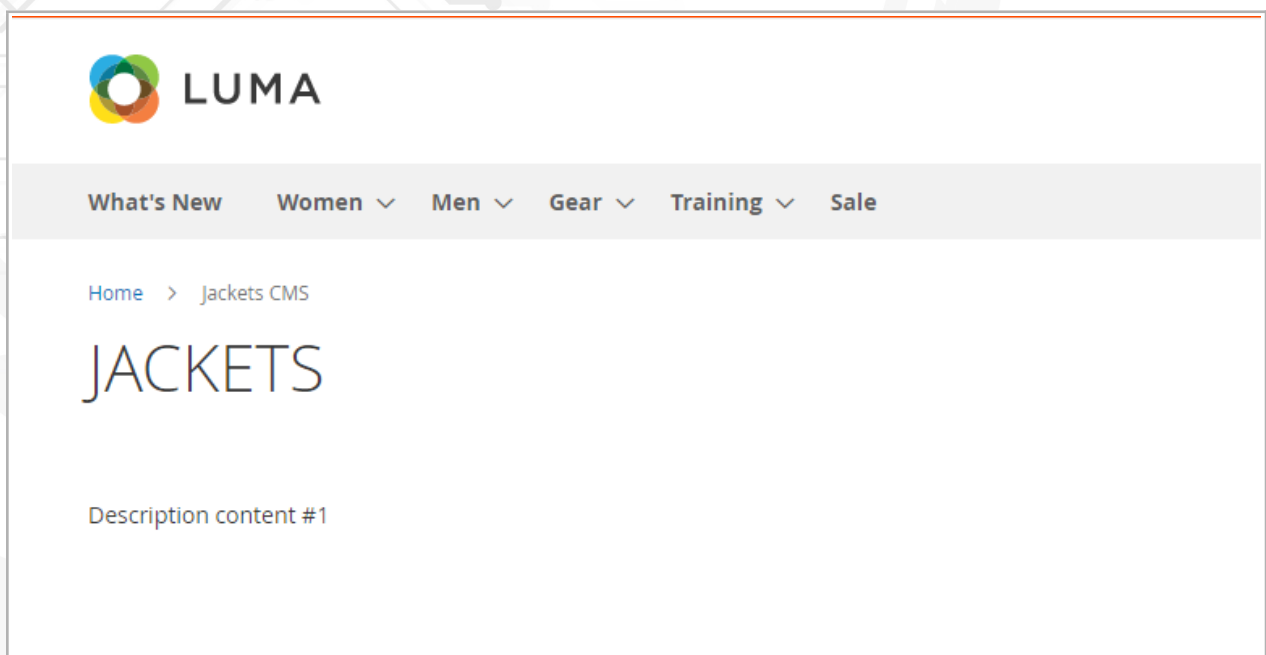
Show / Hide Editor

Paragraph **B** *I* U [List icons] [Link icon] [Table icon] [Omega icon] [Image icon] [Widget icon] (x)

**JACKETS**

Description content #1

 Post Purchase Upsells Offer



## Manage Relations

The section Manage Relations will help to create a “tree” of offers for the customers. For example, a customer can buy a jacket and once he/she confirms the order the extension will redirect him/her to Bras&Tanks.

To create relations go to **Marketing > Manage Relations > Add New Relation**

- **Title** - type the title of relation.
- **Status** - To enable click “Confirm”.
- **Level** - Select the level of relation.
- **Skip Condition Validation** - If you want to skip condition validation click “Yes”.

Relation Information

---

Title \*

Status  Confirm

Level  ▼

Skip Condition Validation  No

In the section "Condition rules" click "Add Condition rules" and select a rule.

### Condition Rules

Assigned Condition Rules

Condition rules description section

**Add Condition Rules**

< 1 of 1 >

ID	Name	Discount Type	Discount Amount	Active	Actions
8	Jackets	fixed	0.0000	1	<a href="#">Remove</a>

### Add Assigned Condition Rules

Cancel **Add Assigned Rules**

Filters | Default View | Columns

Actions 4 records found (1 selected) 20 per page < 1 of 1 >

ID	Title	Status	Created	Modified	
<input type="checkbox"/>	7	Bags	Enabled	Apr 19, 2019 3:02:35 PM	Apr 19, 2019 3:02:35 PM
<input type="checkbox"/>	9	Bras & Tanks	Enabled	Apr 19, 2019 3:19:04 PM	Apr 19, 2019 3:19:04 PM
<input type="checkbox"/>	10	Pants	Enabled	Apr 19, 2019 3:20:40 PM	Apr 19, 2019 3:20:40 PM
<input type="checkbox"/>	11	Rule Check	Enabled	Apr 23, 2019 8:25:08 AM	Apr 23, 2019 8:25:08 AM

In the section **“Action Rules”** > click **“Add Action Rules”**

**Action Rules** ⌵

**Assigned Action Rules**  
Action rules description section **Add Action Rules**

< 1 of 1 >

ID	Name	Discount Type	Discount Amount	Active	Actions
9	Bras & Tanks	fixed	0.0000	1	<a href="#">Remove</a>

**Add Assigned Action Rules** ✕

Cancel **Add Assigned Rules**

Filters Default View Columns



Actions 4 records found (1 selected) 20 per page < 1 of 1 >

<input type="checkbox"/>	ID	Title	Status	Created	Modified
<input type="checkbox"/>	7	Bags	Enabled	Apr 19, 2019 3:02:35 PM	Apr 19, 2019 3:02:35 PM
<input type="checkbox"/>	8	Jackets	Enabled	Apr 19, 2019 3:17:48 PM	Apr 23, 2019 8:25:31 AM
<input type="checkbox"/>	10	Pants	Enabled	Apr 19, 2019 3:20:40 PM	Apr 19, 2019 3:20:40 PM
<input type="checkbox"/>	11	Rule Check	Enabled	Apr 23, 2019 8:25:08 AM	Apr 23, 2019 8:25:08 AM

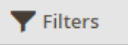


Let's use one relation as example.

We need to place the order using "Bags" products > cancel the offer > show the page "Pants"

### Manage Post Purchase Upsells Relation

  demo\_ppu ▾


[Add New Relation](#)

 Filters  Default View ▾  Columns ▾

Actions ▾ 3 records found 20 per page < 1 of 1 >

<input type="checkbox"/>	ID	Title	Status	Level	Action
<input type="checkbox"/>	3	Bags > Confirm > Jackets	1	1	<a href="#">Edit</a>
<input type="checkbox"/>	4	Bags > Cancel > Pants	0	1	<a href="#">Edit</a>
<input type="checkbox"/>	5	Jackets > Confirm > Bras & Tanks	1	2	<a href="#">Edit</a>

We created the order and added two bags to the basket.

Sign In

Shipping

Review & Payments

### Payment Method

Credit Card (Stripe)


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Check / Money order

My billing and shipping address are the same

Test Test  
301, 4205 116 Ave SE  
Calgary, Florida 12345  
United States  
0907876876

[Terms & Conditions](#)



 PayPal (Braintree)

[Place Order](#)

### Order Summary

Cart Subtotal	\$90.00
Shipping Flat Rate - Fixed	\$10.00
<b>Order Total</b>	<b>\$100.00</b>

2 Items in Cart [^](#)

	Push It Messenger Bag	\$45.00
	Qty: 1	
	Overnight Duffle	\$45.00
	Qty: 1	

We placed the order > clicked "Cancel"

## Bags

Bags



Joust Duffle Bag

\$34.00

★★★★☆ 2 reviews

Qty

1 ▾

Add To My Order



Strive Shoulder Pack

\$32.00

★★★★☆ 2 reviews

Qty

1 ▾

Add To My Order



Rival Field Messenger

\$45.00

★★★★☆ 2 reviews

Qty

1 ▾

Add To My Order



Yoga Adventure

\$22.00




Add To My Order

Cancel

After clicking the "Cancel" button the page "Pants" was shown.

# Pants

Pants

		
<b>Karmen Yoga Pant</b>	<b>Emma Leggings</b>	<b>Ida Workout Parachu...</b>
<b>\$39.00</b>	<b>\$42.00</b>	<b>\$48.00</b>
★★★★★ 2 reviews	★★★★★ 3 reviews	★★★★★ 3 reviews
<a href="#">Add To My Order</a>	<a href="#">Add To My Order</a>	<a href="#">Add To My Order</a>

[Cancel](#)

## Order Status

As soon as a customer places an order and purchases it, the order will be of the status "Pending Post Purchase"

### Orders


Search  yana 

Create New Order

Search by keyword 

Filters

Default View 

Columns 

Export 

Actions 

22 records found

20 per page 

1 of 2  

	ID	Purchase Point	Purchase Date 	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000034	Main Website Main Website Store Default Store View	May 21, 2018 12:53:59 PM	Hanit Selekteer	Hanit Selekteer	\$108.00	\$108.00	Pending Post Purchase	<a href="#">View</a>	

If, for instance, 10 minutes is made available to a customer (the amount of time can be specified from the configuration panel) to select post purchase products. As soon as the customer add upsell products and clicks on confirm, the order will be of the status “Processing”.

## Orders

Search  2  yana ▾

Create New Order

Search by keyword 

Filters

Default View ▾

Columns ▾

Export ▾

Actions ▾

22 records found

20 per page

1 of 2

<input type="checkbox"/>	ID	Purchase Point	Purchase Date ↑	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
<input type="checkbox"/>	000000034	Main Website Main Website Store Default Store View	May 21, 2018 12:53:59 PM	Hanit Seleker	Hanit Seleker	\$231.30	\$231.30	Processing	View	

## Payment Transaction Processing

Before “Thank you page” a customer sees the block with post purchase upsell products where he/she can buy the products within some minutes (the minutes can be configured from configuration panel).

There is already one transaction for purchased order and when a customer adds the products from upsell block, the products will be added right to just now purchased order BUT this order will have 2 transactions. Right then the order has the status “Processing”.

#000000032

🔍 2 👤 yana ▾

← Back   Send Email   Credit Memo   Hold   Ship   Reorder

- ORDER VIEW
- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions**

Search   [Reset Filter](#)   2 records found   20 per page   1 of 1

ID	Order ID	Transaction ID	Parent Transaction ID	Payment Method	Transaction Type	Closed	Created ↑
From							From
To							To
22	000000032	ch_1CSl2tKxTBzZl6DD5EgOEc9		Credit Card (Stripe)	Capture	No	May 17, 2018 12:17:24 PM
21	000000032	ch_1CSl2dKxTBzZl6DD4LWvENY		Credit Card (Stripe)	Capture	No	May 17, 2018 12:17:08 PM

## Post Purchase Upsells Example

Select the products to be added to the **Shopping Cart > Proceed to Checkout > Choose a Payment Methods > click Place Order** and you will be provided with the post purchase upsell products, which will allow you to to already previously purchased order without reloading the page.

Test title

Test description  
The offer will be invalid after: 00:08:43



Joust Duffle Bag  
**\$30.60** Regular Price  
\$34.00

★★★★☆ 2 reviews

Qty  
1 ▾

Add to Cart



Strive Shoulder Pack  
**\$28.80** Regular Price  
\$32.00

★★★★☆ 2 reviews

Qty  
1 ▾

Add to Cart



Fusion Backpack  
**\$53.10** Regular Price  
\$59.00

★★★★☆ 3 reviews

Qty  
1 ▾

Add to Cart



Savvy Shoulder Tote  
**\$21.60** Regular Price  
\$32.00

★★★★☆ 2 reviews

Qty  
1 ▾

Add to Cart



Crown Summit Backpack  
**\$34.20** Regular Price  
\$38.00

★★★★☆ 3 reviews

Qty  
1 ▾

Add to Cart

Cancel

Choose the upsell products to be added to the order and select **Confirm**.

## Test title

Test description  
The offer will be invalid after: 00:08:01



Joust Duffle Bag  
**\$30.60** Regular Price  
\$34.00

★★★★☆ 2 reviews

Qty

1 ▾

Cancel



Strive Shoulder Pack  
**\$28.80** Regular Price  
\$32.00

★★★★☆ 2 reviews

Qty

1 ▾

Cancel



Fusion Backpack  
**\$53.10** Regular Price  
\$59.00

★★★★☆ 3 reviews

Qty

1 ▾

Add to Cart



Savvy Shoulder Tote  
**\$21.60** Regular Price  
\$32.00

★★★★☆ 2 reviews

Qty

1 ▾

Add to Cart



Crown Summit Backpack  
**\$34.20** Regular Price  
\$38.00

★★★★☆ 3 reviews

Qty

1 ▾

Add to Cart

Cancel

Confirm



— WE THRIVE YOUR

# FEEDBACK

AND INPUT!

Email: [customer@pageside.com](mailto:customer@pageside.com)

Skype: [pageside](#)

Facebook: [www.facebook.com/pageside](http://www.facebook.com/pageside)

Twitter: [www.twitter.com/pageside](http://www.twitter.com/pageside)

Mageside is a team of developers dedicated to Magento installation, support, extension creation and advanced customization. We are good at doing the heavy lifting, and there is no Magento project that is out of scope on a technical basis.

Mageside does full site conversions, Magento 2 upgrades, advanced extension development, deep systems integration and all the other fun stuff. Our code is incredibly clean, we are on first name basis with several of the core devs, and love every opportunity to create another fine expression of ecommerce. If you need the best, let us work on your next project.