Cross-Selling Rules

Create and assign automated upsell rules.

- Summary
- Cross-Selling Rules
- Set Up a Related Product
- Set Up an Upsell

Summary

Use this screen to view and manage cross-selling rules. Cross-selling rules allow you to automatically link Related Items and Upsells to products via Category/Brand/Collection/Attribute associations.

Key to icons

Edit = edit

Delete = delete

Setup

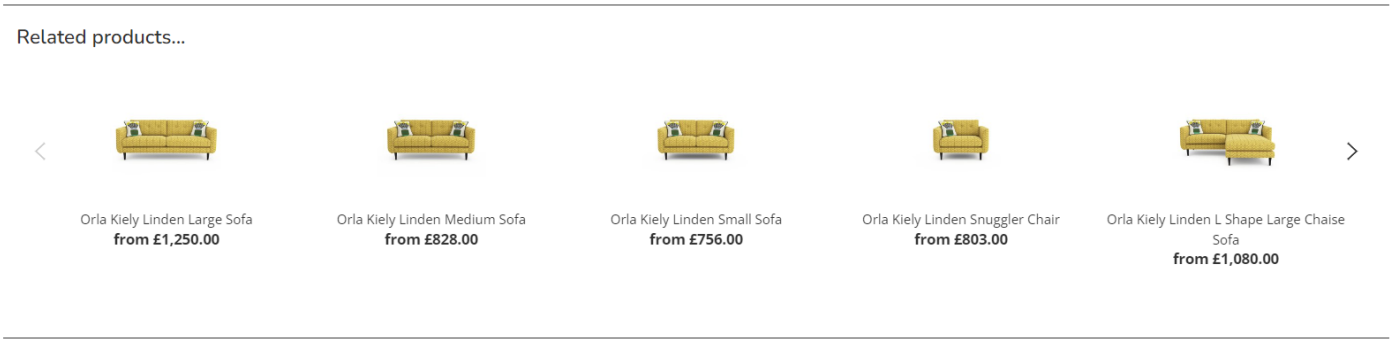
Rule Setup

Rules must be setup for this functionality to work.

Related Products

Search for products to include them in this rule.

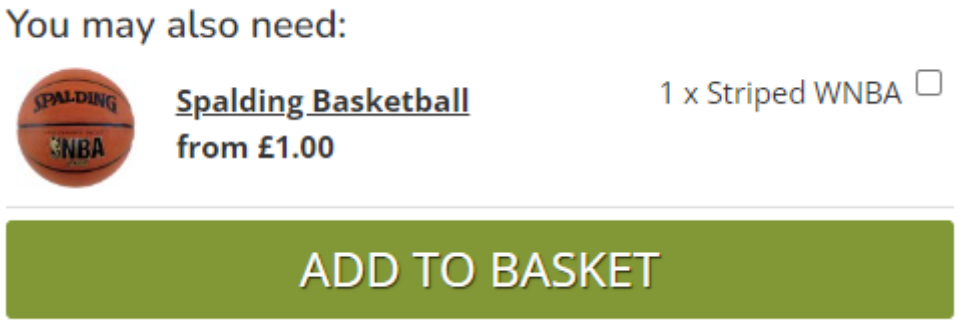
These are similar to a 'you may also like', and are displayed below the product description on the Product Detail Page.



Upsell Products

Search for products to include them in this rule.

These are typically simple products, which should be single click upsells, e.g. scatter cushions or a basketball upsold to a pair of trainers. These will display near the add to basket button of the Product Detail Page.



> Made to Order and Bundle products can not be upsells; due to the complexity of these products, they can not be single click adds to basket.
>
> Products with multiple variants are not recommended for Upsells - use Basket Upsells instead.

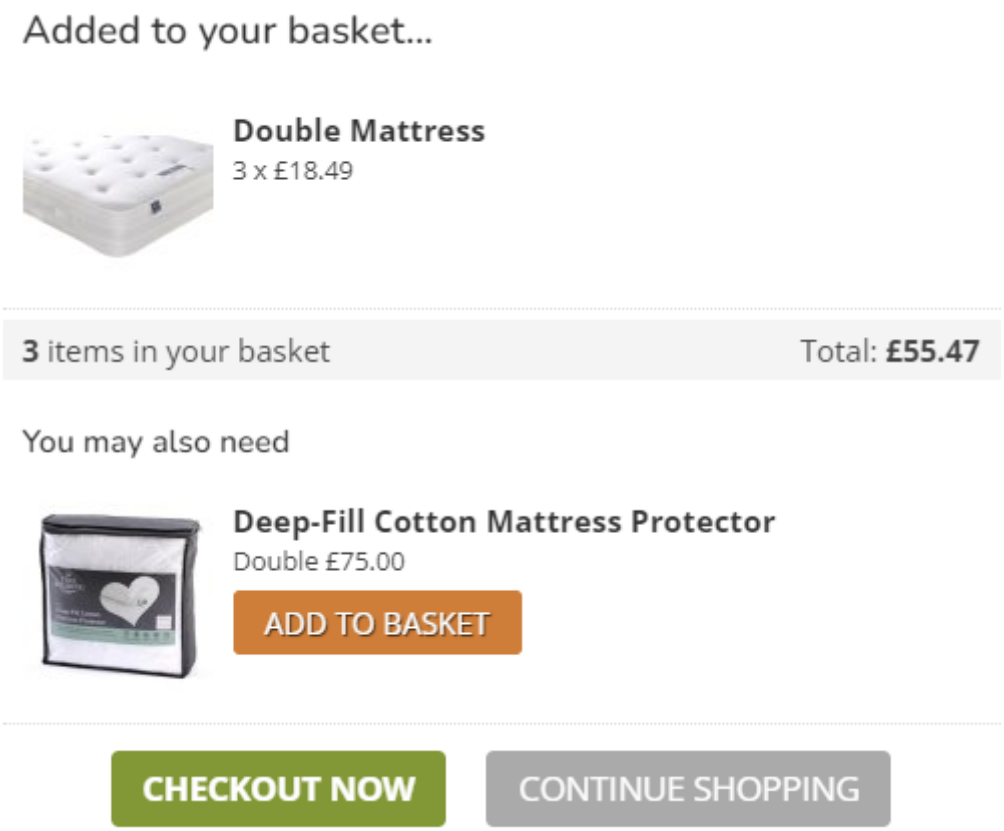
Basket Upsells

Search for Variants to include them in this rule. You may also need to setup an Optional Filter.

Field	Purpose
Optional Filter	*This limits the rule to apply to certain Variants of Products that meet the rule's criteria, e.g. to only apply this upsell to the 'large' variant of a product, simply enter 'large'*

These are Variant to Variant upsells, and are applied to the add to basket pop up. Once an item has been added, the platform knows which Variant has been selected, which allows for dynamic upselling.

A perfect use for this would be upselling a 'double' mattress protector to a customer who has bought a 'double' mattress, or 'size 10' socks to a customer who has bought 'size 10' shoes.



Made to Order Upsells

> Made to Order and Bundle products can not be quick upsells; due to the complexity of these products, they can not be single click adds to basket.

It is possible to upsell Made to Order Products (e.g. with Customisations), if the original Product is also a Made to Order item.

For example, a customer seeks to purchase a Divan in Pink Velvet; you may wish to upsell a Headboard Product in the same colour. Both items are Made to Order. If the Headboard is linked to the Divan as an upsell, **and** the Divan is set to use the Swatch Wizard, then the customer will be asked to choose and configure upsells as part of the buying journey.

FAQs

Why isn't my Upsell showing in the Add to Basket Popup?

There may be several answers for this:

1. The upsell is a Made to Order Product
2. The upsell is unavailable

3. The upsell is already in the Customer's basket
4. The upsell relates to another item in the Customer's basket, but not the one that they just added

Cross-Selling Rules

These rules can be used to automatically add various types of cross-sells to Products; it is also possible to assign these manually to individual products on the Related tab when when editing a Product.

How Cross-Selling Rules Work

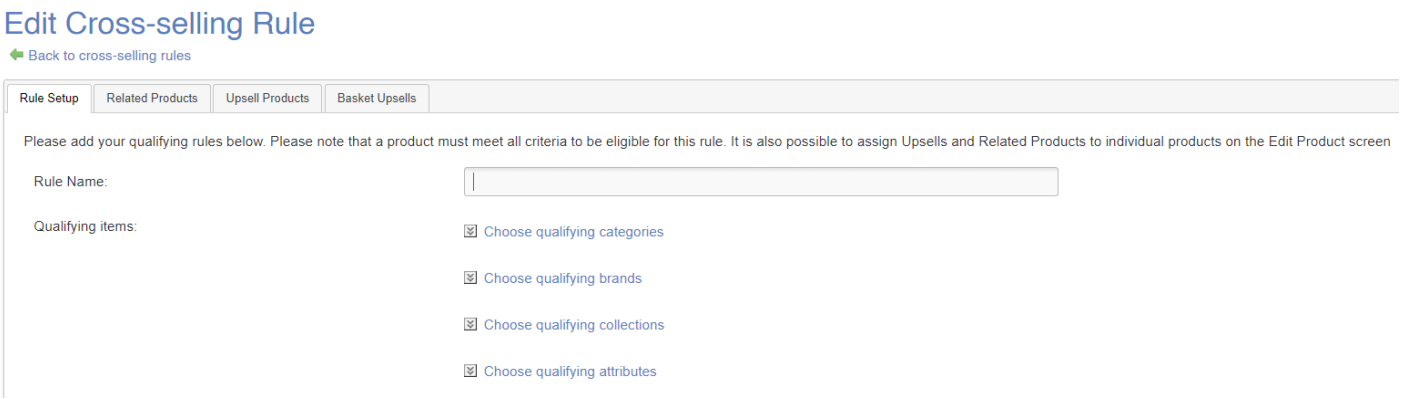
The user sets up several rules, by which the website can check whether any product qualifies for cross-selling.

Through this method, when products become eligible, those cross-sells will apply immediately.

When a product ceases to be eligible, those cross-sells will immediately be removed.

Setting Up New Cross-Selling Rules

Overlay Rules are managed in the second tab of the Edit Product Overlay screen.



Simply select the criteria that you wish to apply to your Cross-Selling Rule.

> Cross-Selling Rules work on an **AND** basis. That means that in order for a rule to be applied, all criteria must be met.
>
> E.g. Products in the 'Sofa' category that also have the 'Leather' attribute

Once added, this will be automatically active, and all live Products will display the relevant cross-selling selections.

> If you want your rule to apply to only certain Variants, use the Optional Filter; simply enter the string that should be present
>
> For example to upsell a 'Single Mattress' to all Products in the 'Bedframes' category, simply enter 'Single' in the optional filter, and it will only apply to Variants with 'Single' entered as the optional value
>
> To further restrict this, tick 'exact match only', which will ensure a precise match, e.g. differentiating between 'Large Single' and 'Small Single'

Set Up a Related Product

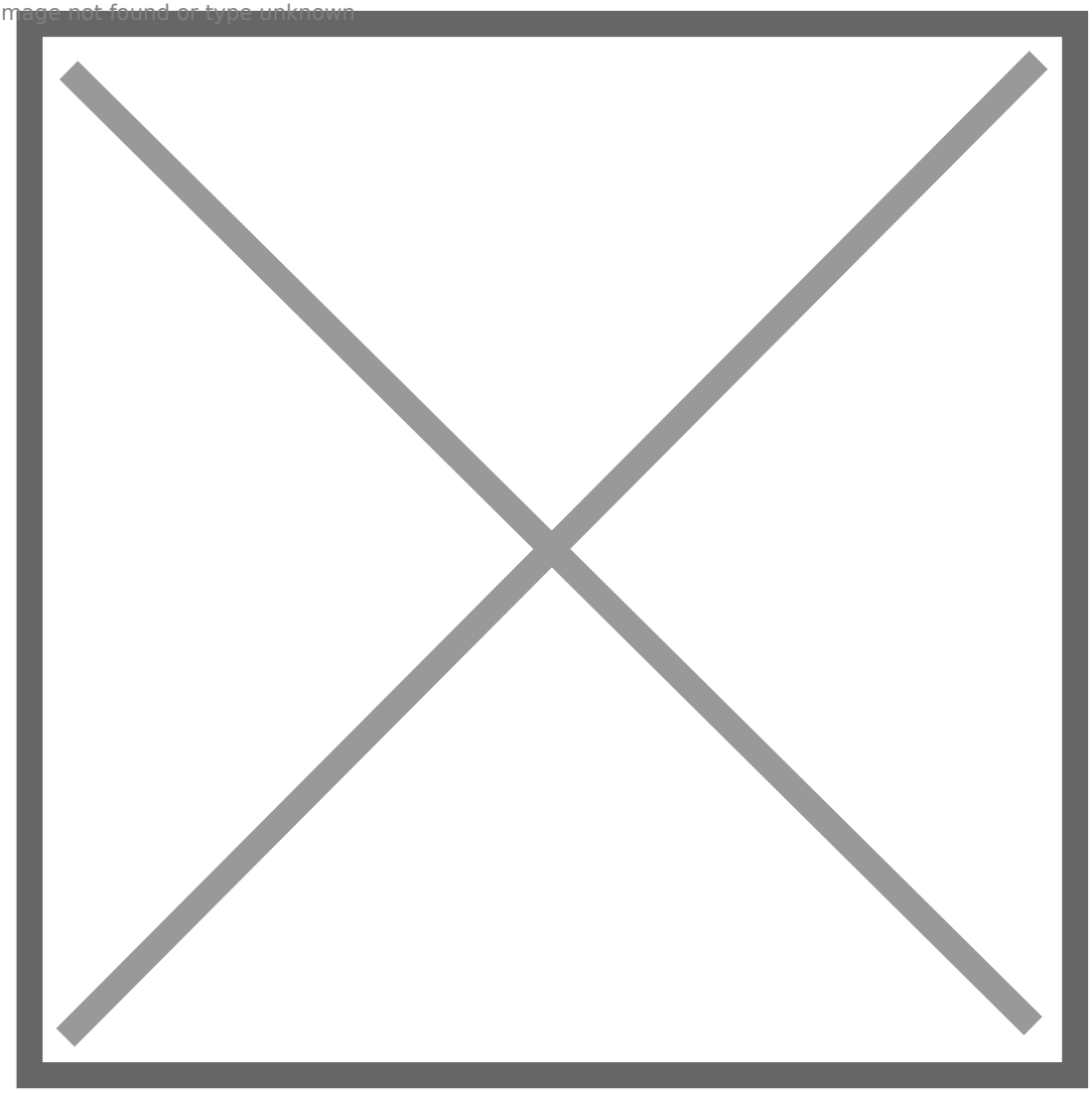
Set Up an Upsell

Upsells can be applied from within the Cross-Selling Rules screen, which allows you to apply the upsell to any products that match a certain criteria.

> The steps below show you how to set up upsells with Variant filters. If you wish to add product level upsells, follow the same steps, but choose 'product' on step 5

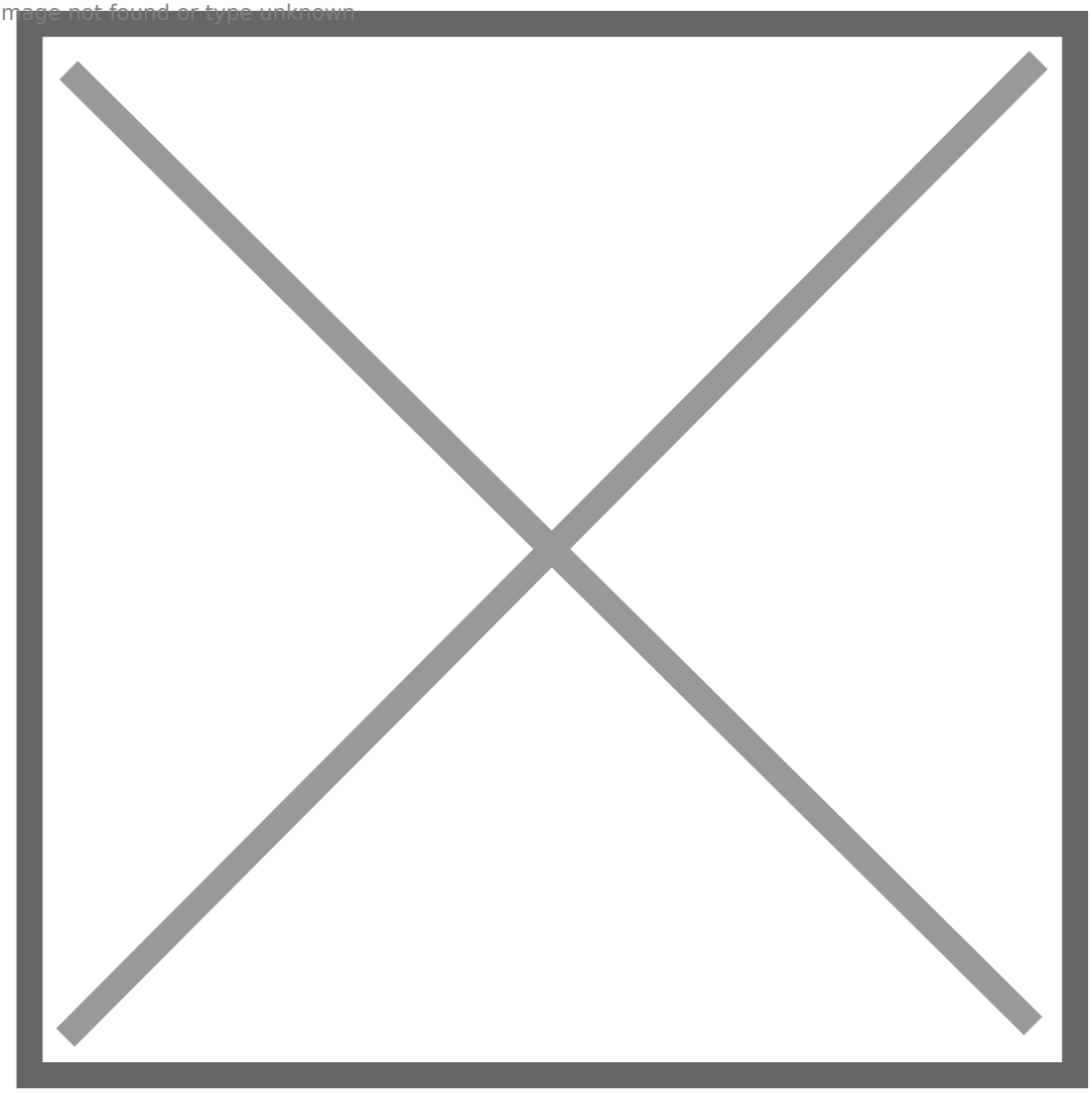
1. Click "Add a upsell rule add a cross-selling rule"

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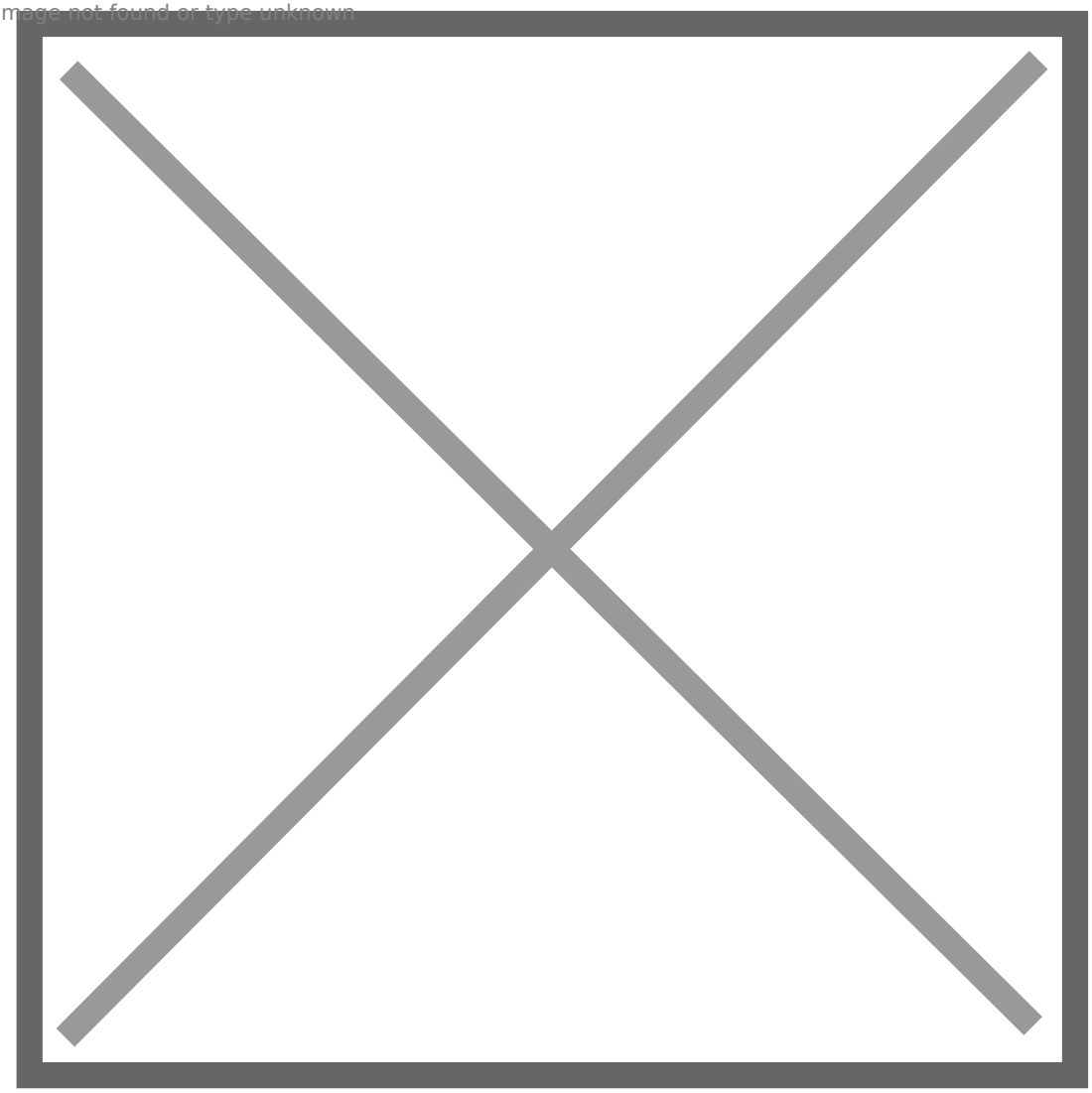
2. Click here

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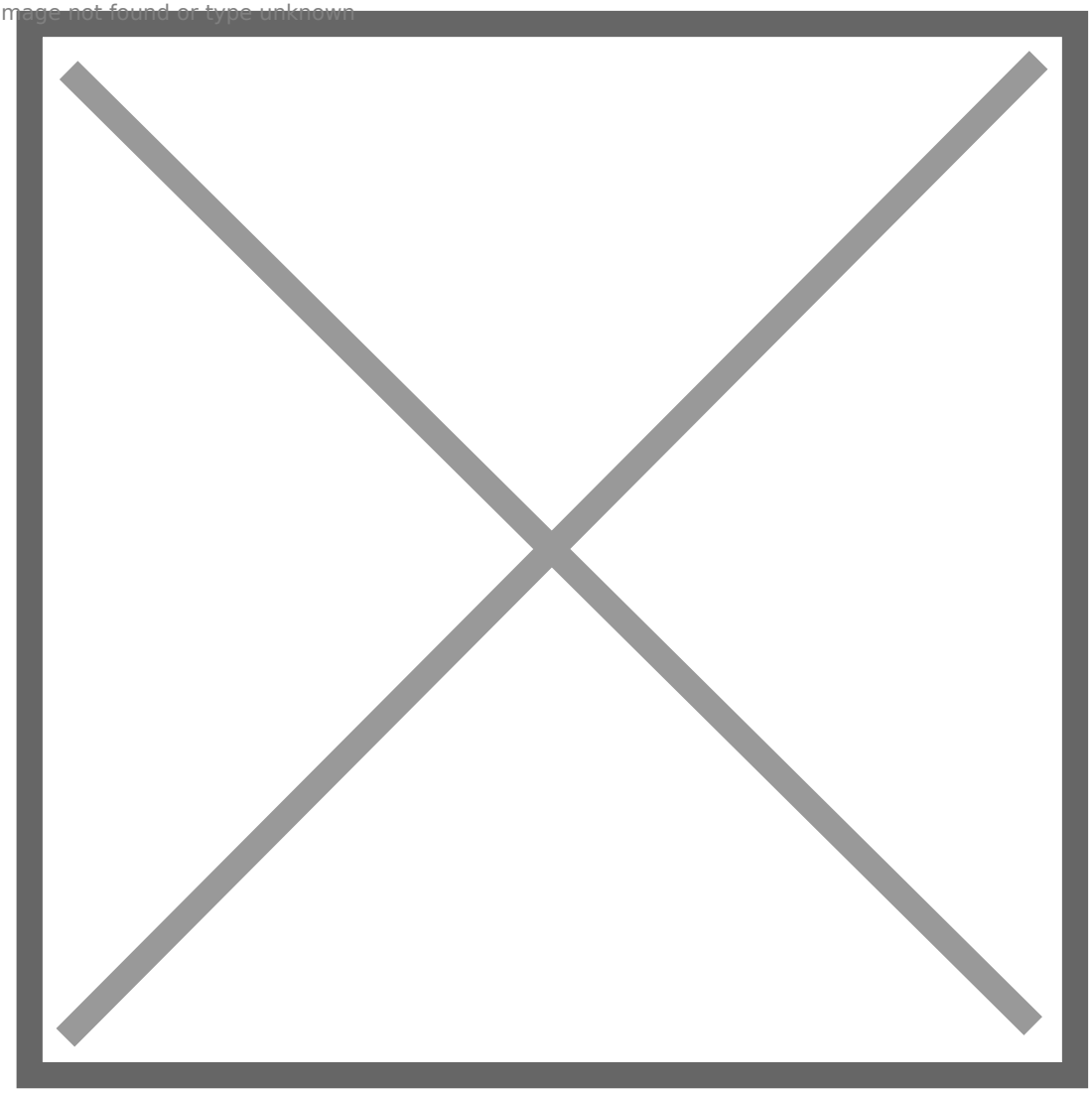
3. Add your rules

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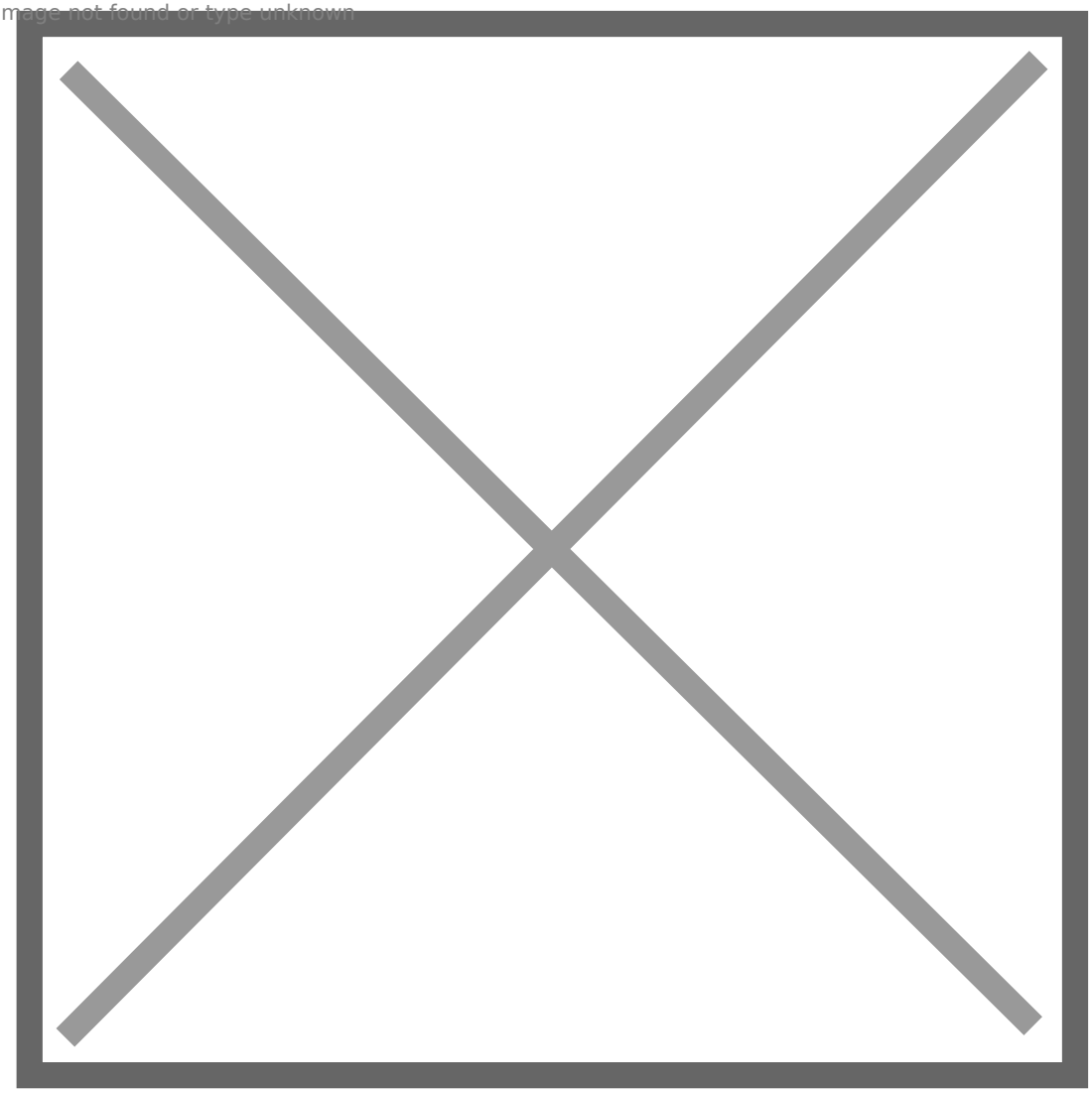
4. Click to add Upsell Products

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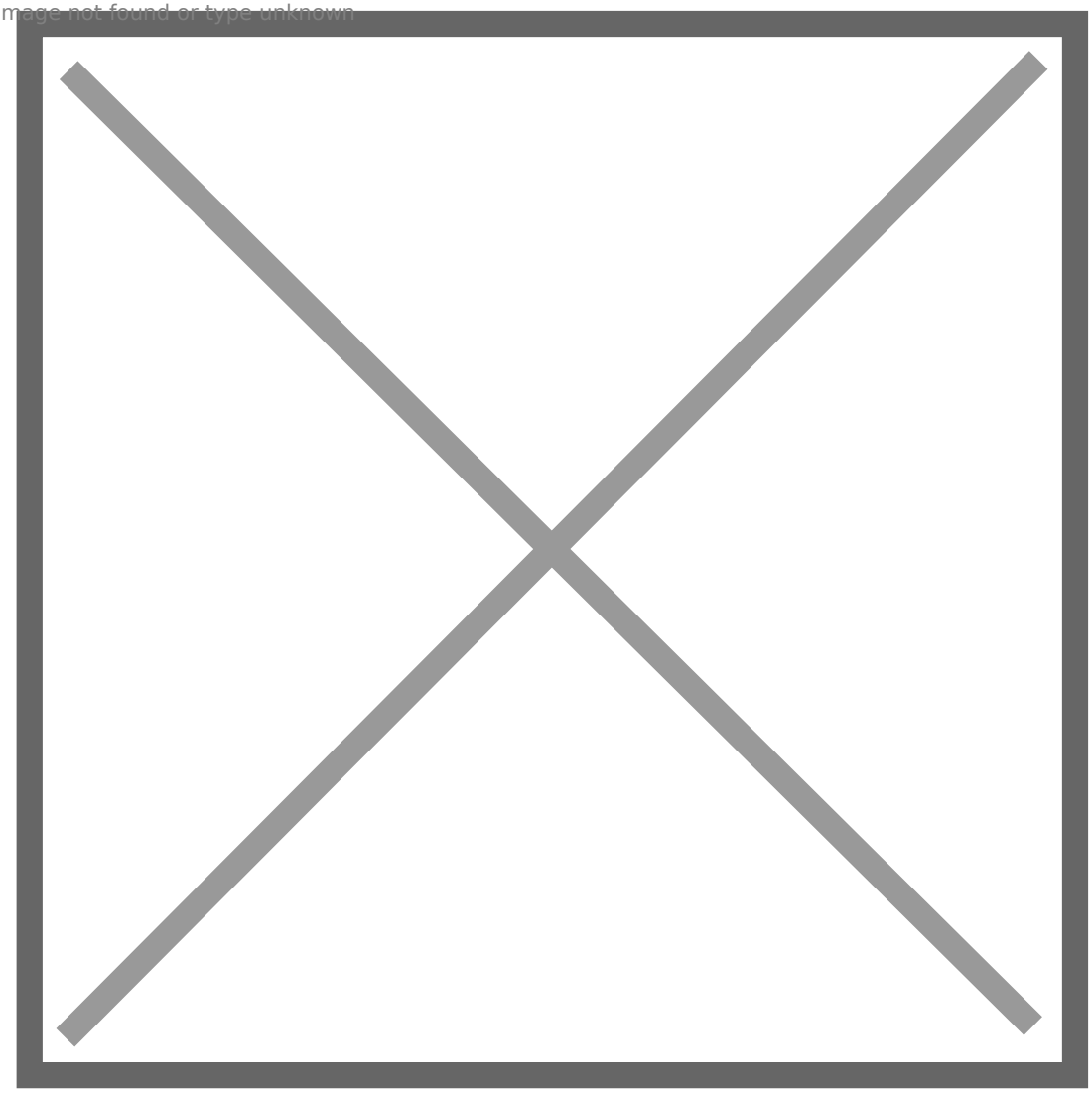
5. Click "Variants"

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6. Click "add group"

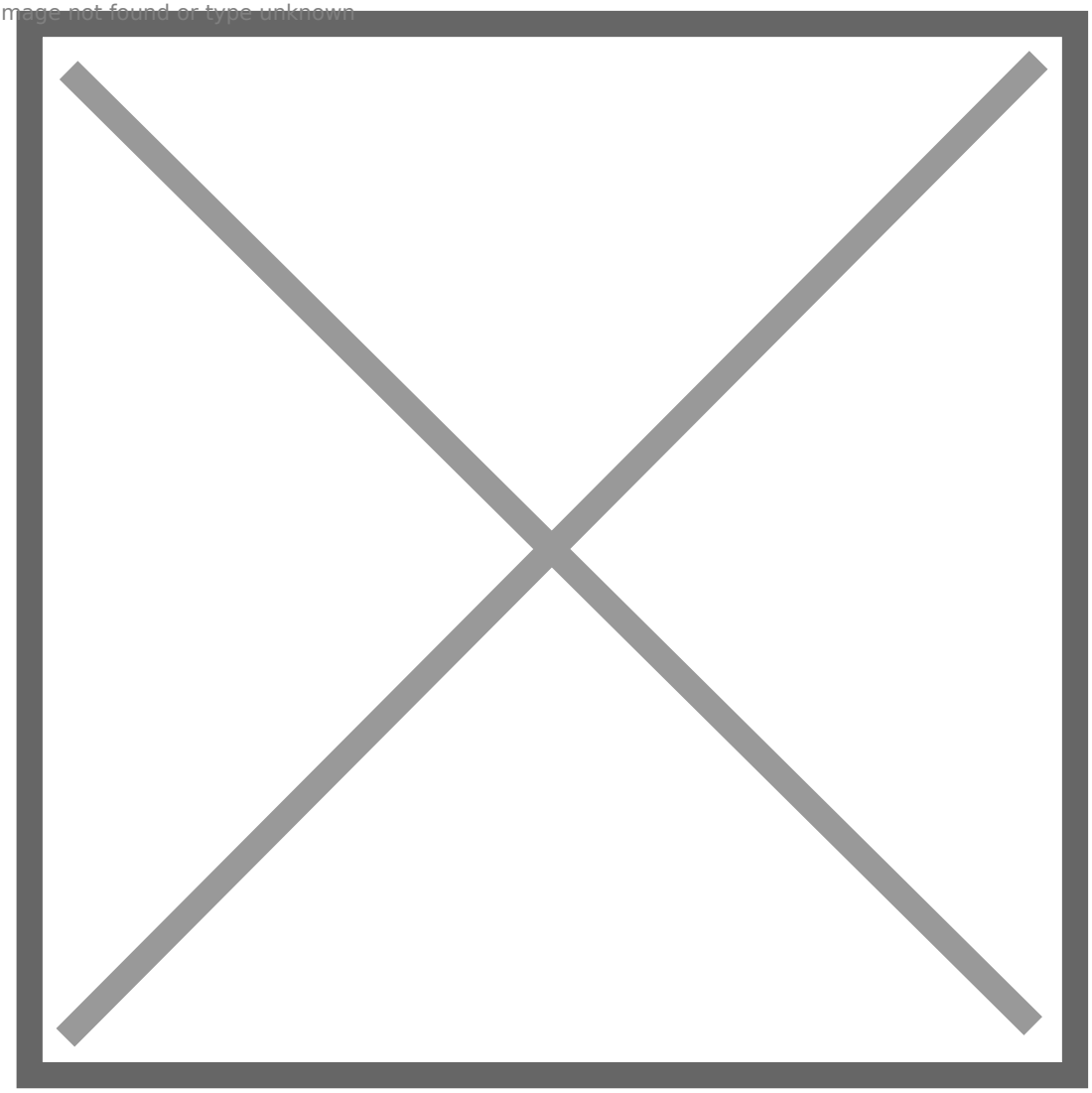
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Tip: Groups are displayed to the customer, and allow you to group similar prouducts, e.g. ask a customer to select a mattress protector from a list, and then offer them pillows separately.

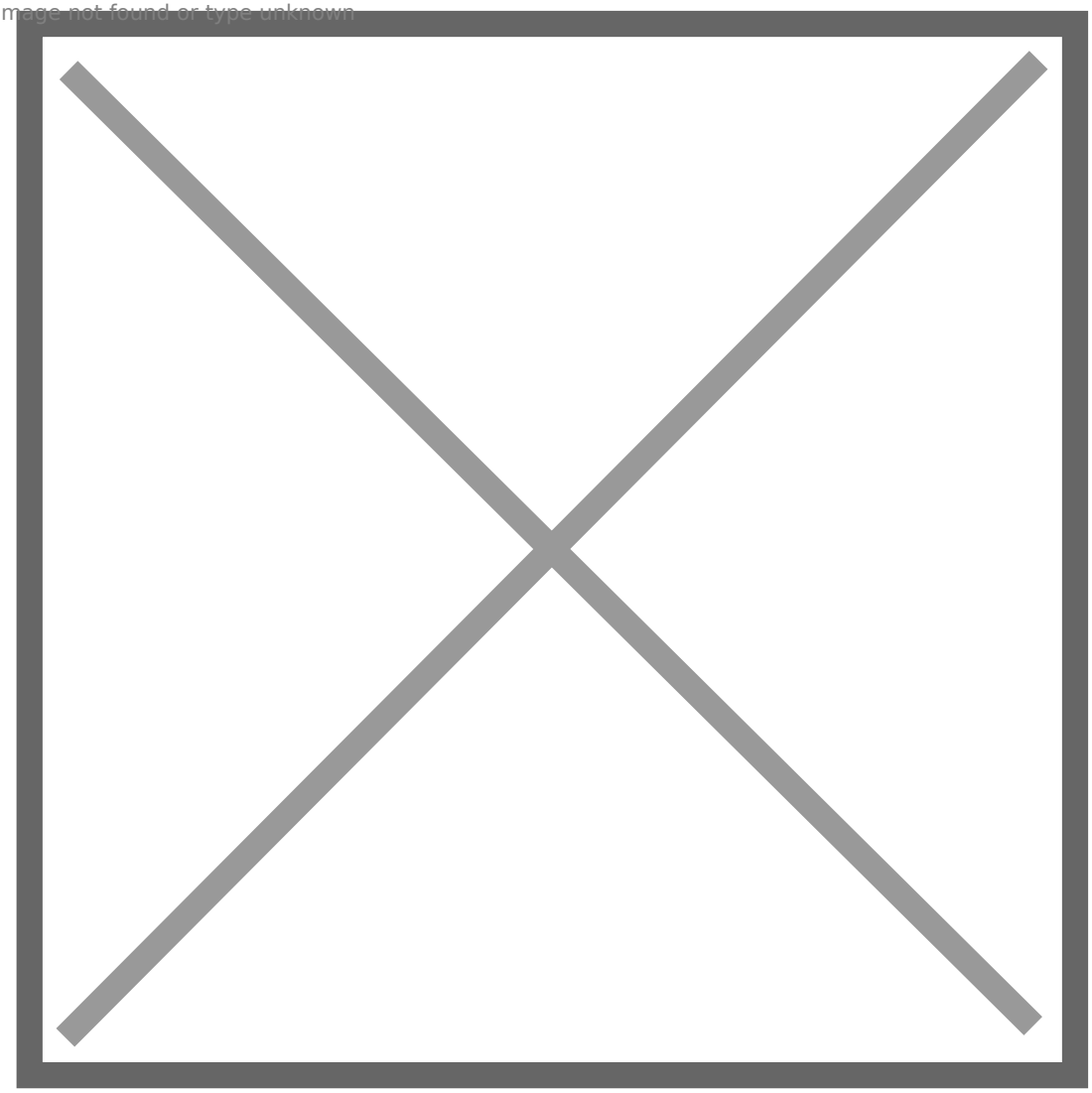
7. Enter your group name

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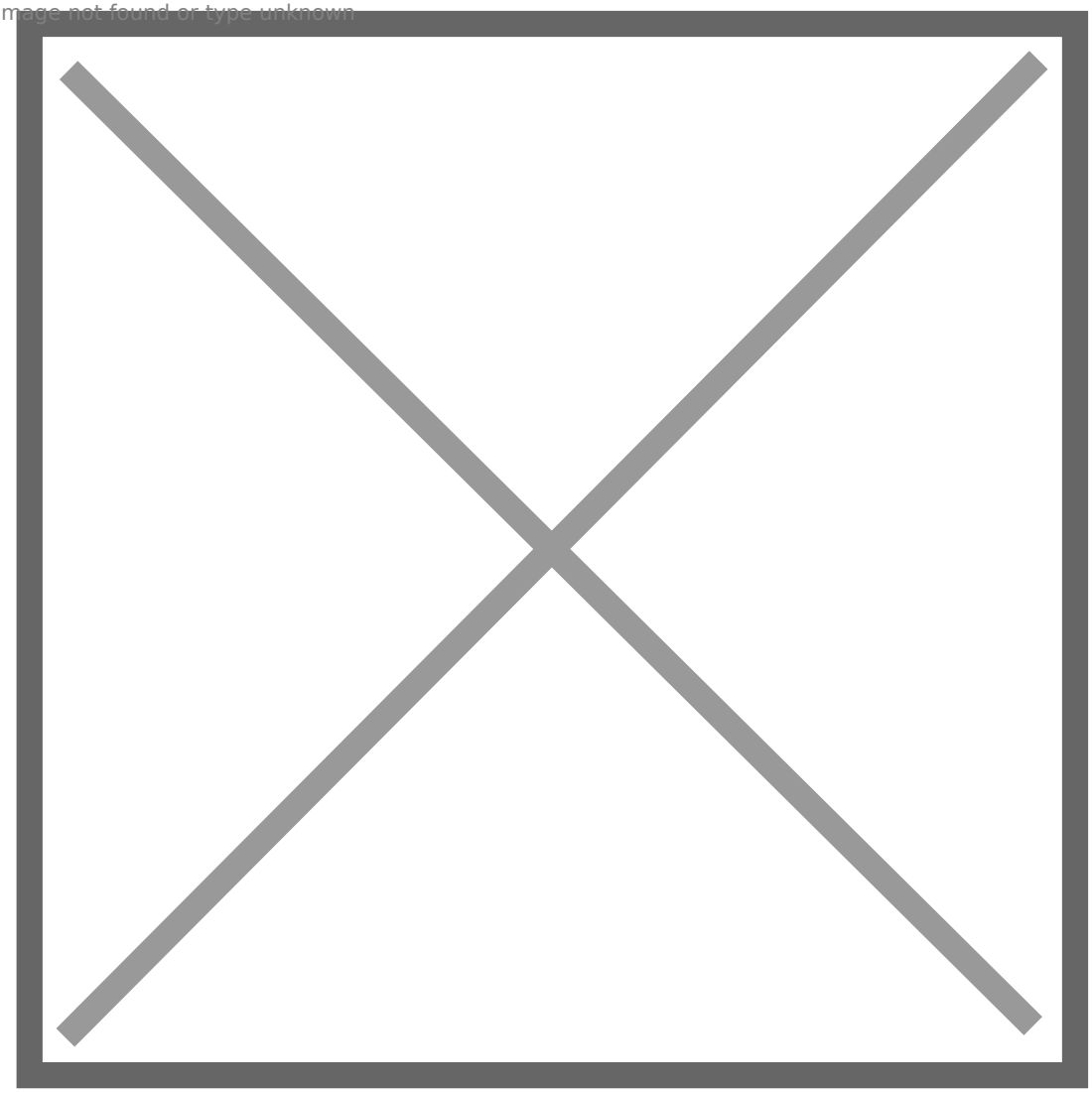
8. Use this dialogue to search for the specific Variants that you wish to upsell.

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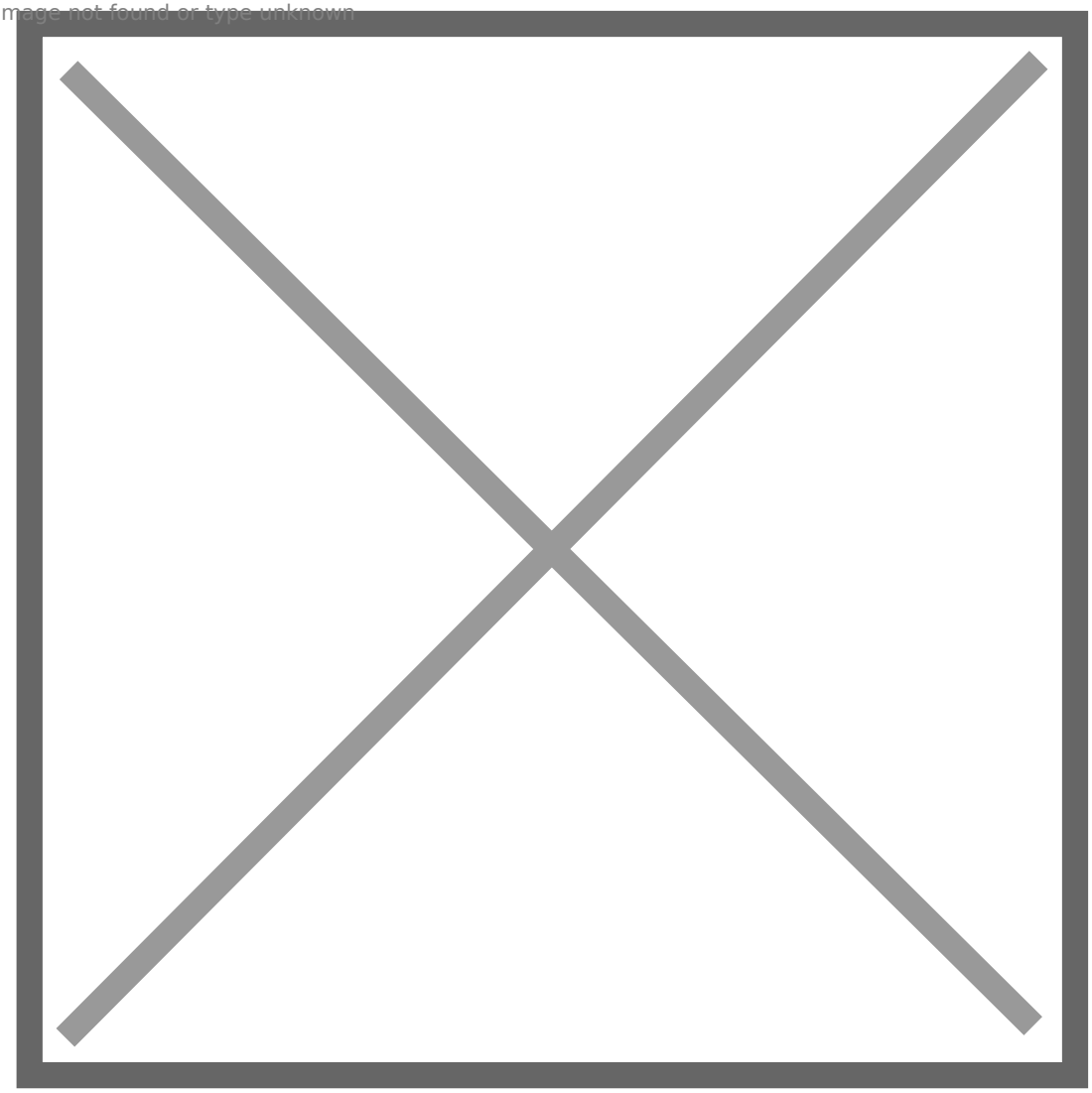
9. Click to select

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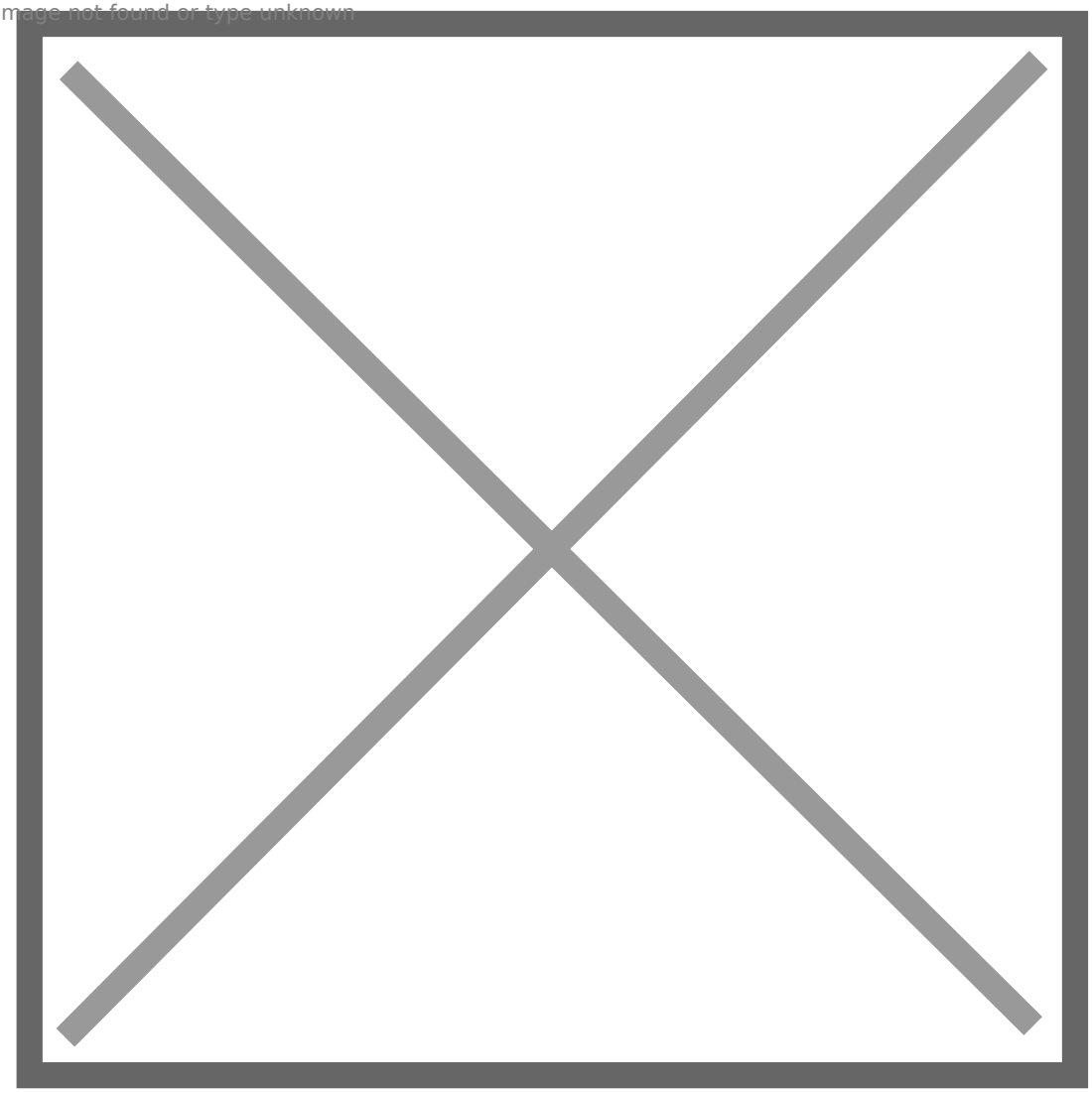
10. Click to add a Variant filter - this rule will only apply if a customer is purchasing a product that meets the rules on the previous tab, and that they are also buying a Variant with an option value that matches the text entered here.

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11. Click "Update" to save your changes

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FAQs

How will my Upsells Display in the POS and CMS?

This page will show you how these can be viewed.

How can I control the sequence of my Upsells?

This page will show you how these can be controlled.