

# Cross-Selling Rules

Create and assign automated upsell rules.

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# 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 or type unknown

 = delete or type unknown

# 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](#).

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Related products...



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## 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.

You may also need:



**Spalding Basketball**  
from £1.00

1 x Striped WNBA

ADD TO BASKET

“ 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 | <i>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'</i> |

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.

Added to your basket...



**Double Mattress**

3 x £18.49

3 items in your basket

Total: **£55.47**

You may also need



**Deep-Fill Cotton Mattress Protector**

Double £75.00

**ADD TO BASKET**

**CHECKOUT NOW**

CONTINUE SHOPPING

“ 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.

# 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 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 Overlay Rules

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

### Edit Cross-selling Rule

[← Back to cross-selling rules](#)

Rule Setup   Related Products   Upsell Products   Basket Upsells

Please add your qualifying rules below. Please note that a product must meet all criteria to be eligible for this rule. It is also possible to assign Upsells and Related Products to individual products on the Edit Product screen

Rule Name:

Qualifying items:

- Choose qualifying categories
- Choose qualifying brands
- Choose qualifying collections
- Choose qualifying attributes

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.

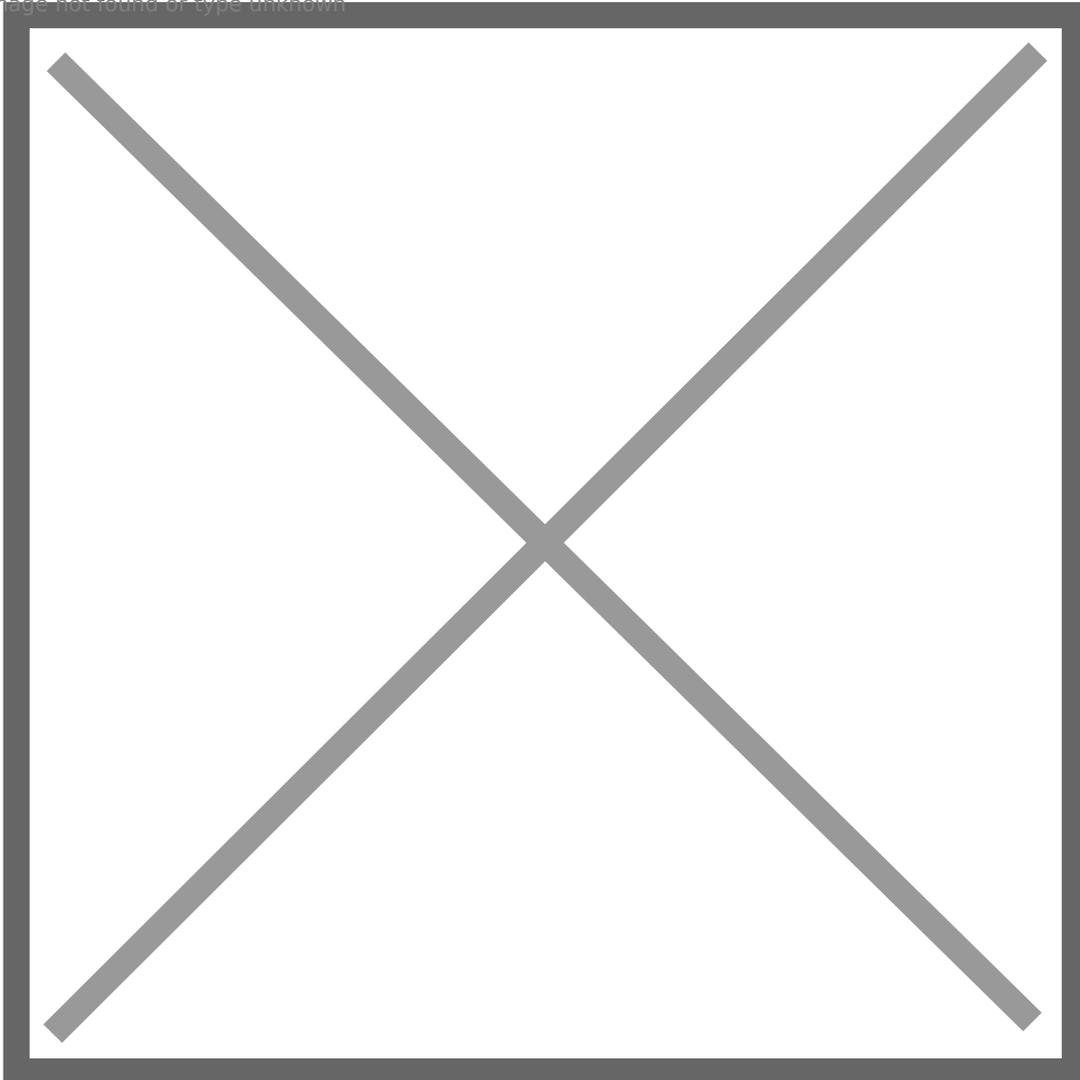
# Set Up a Related Product

# 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.

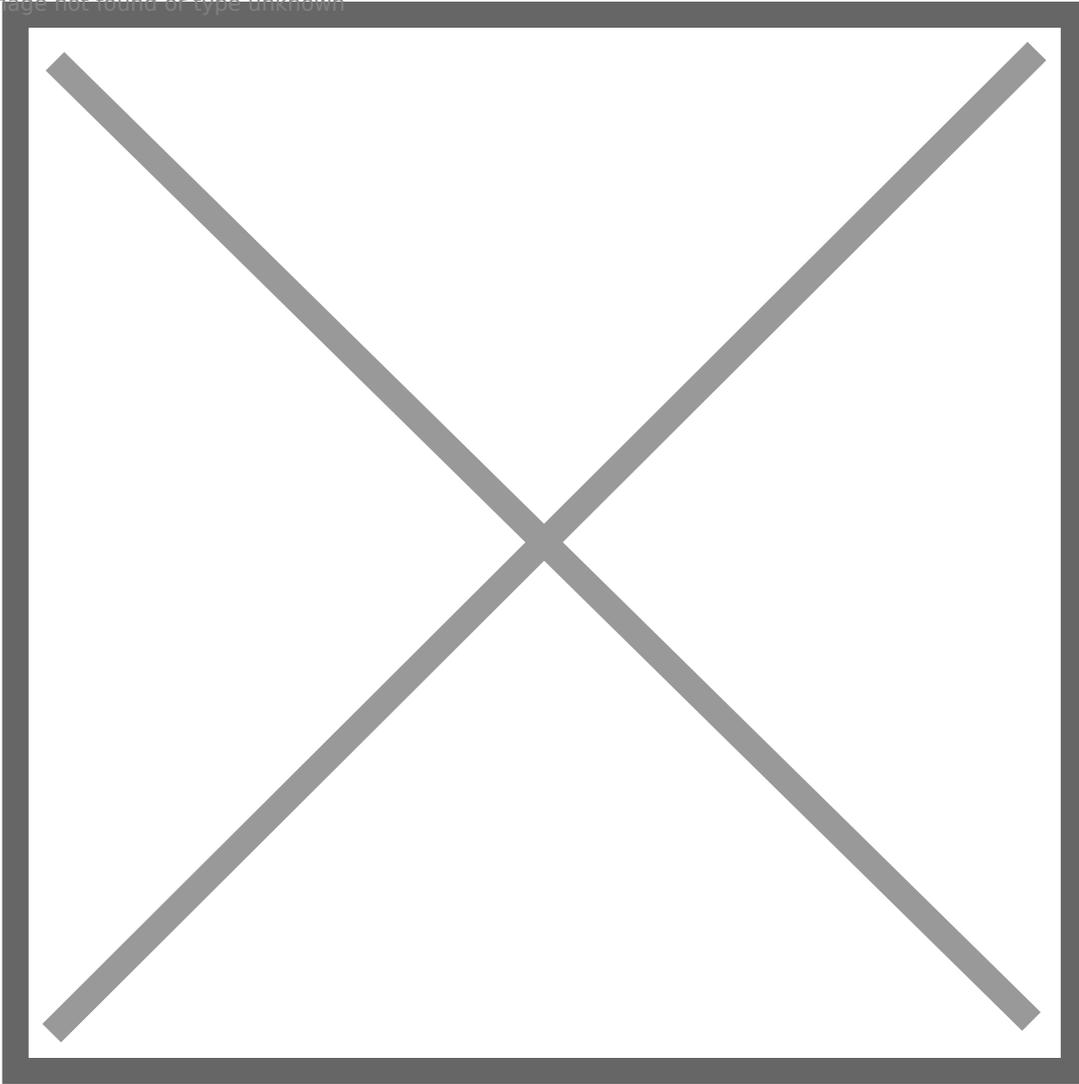
1. Navigate to your CMS.
2. Click "Dashboard" from the navigation bar.

Image not found or type unknown



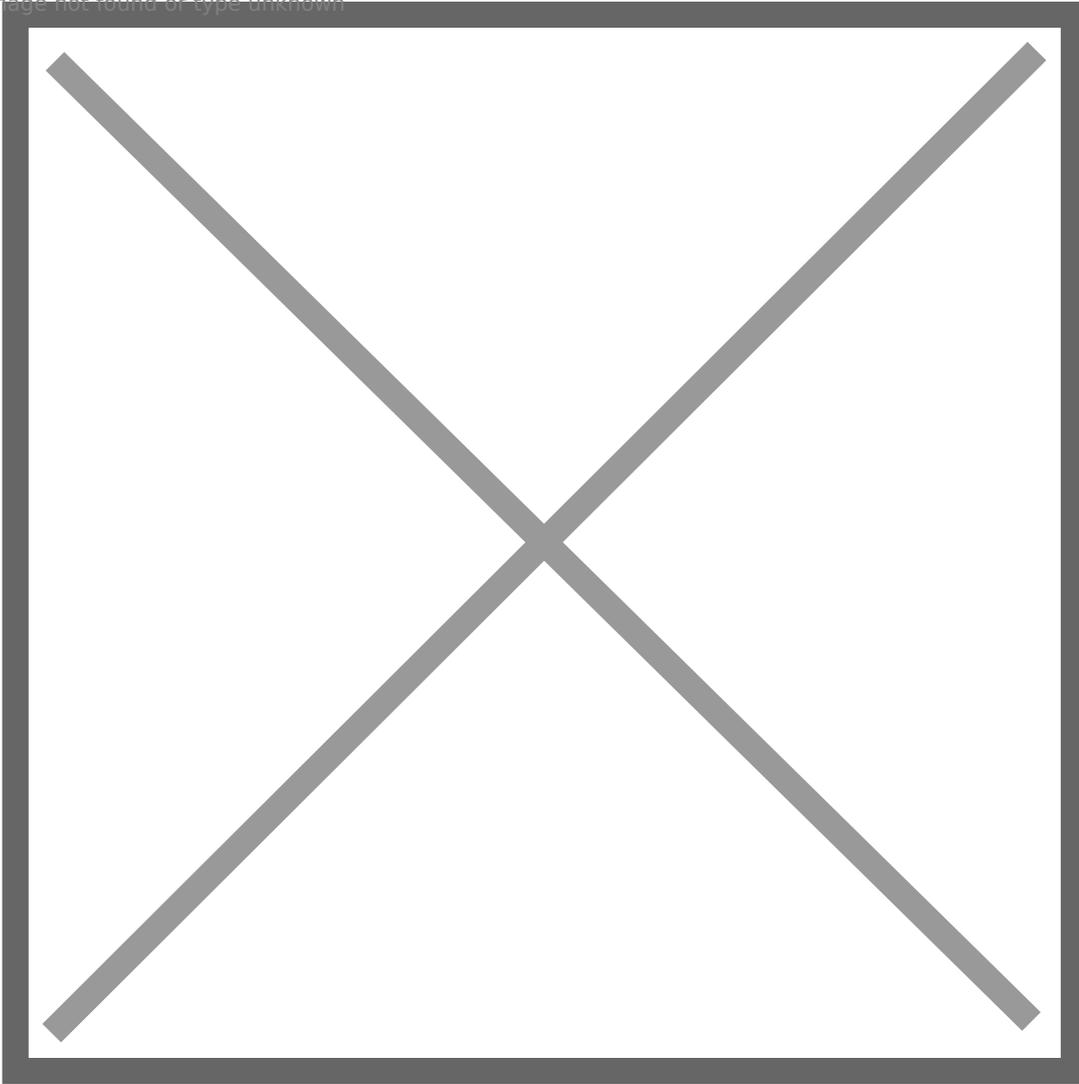
3. Click "Cross-Selling Rules" under "Catalogue".

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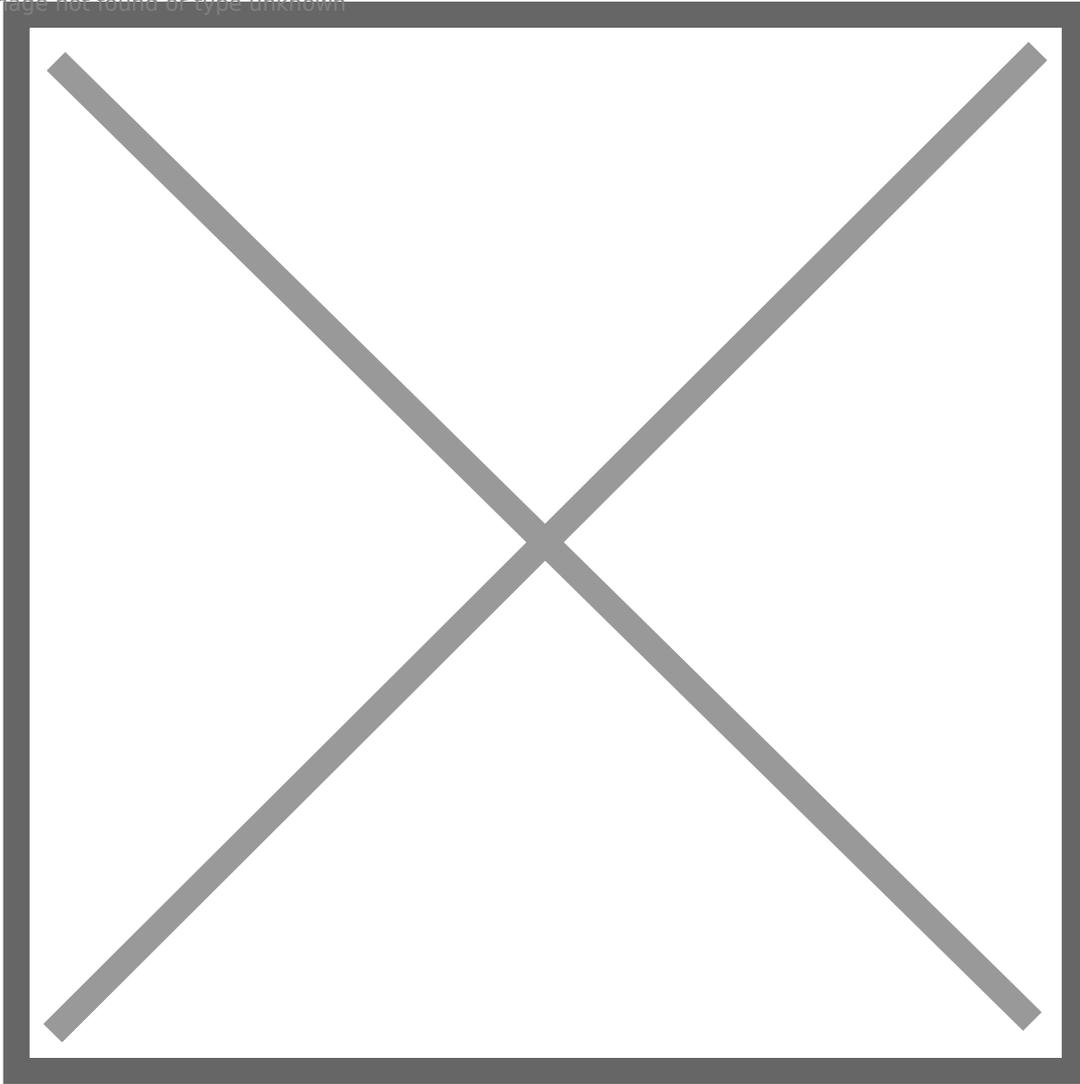
4. Click "add a cross-selling rule".

Image not found or type unknown



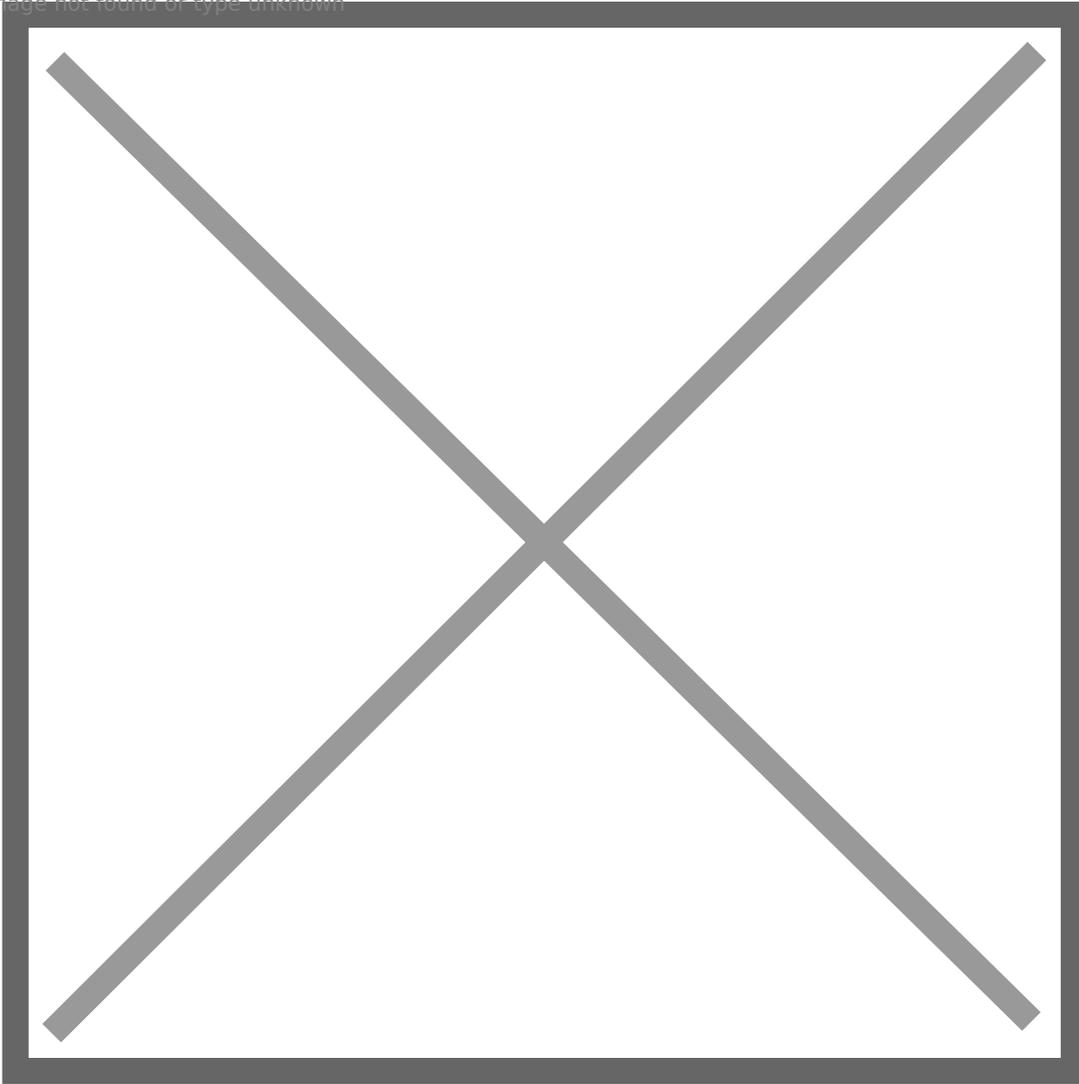
5. Enter a name for the Cross-selling rule

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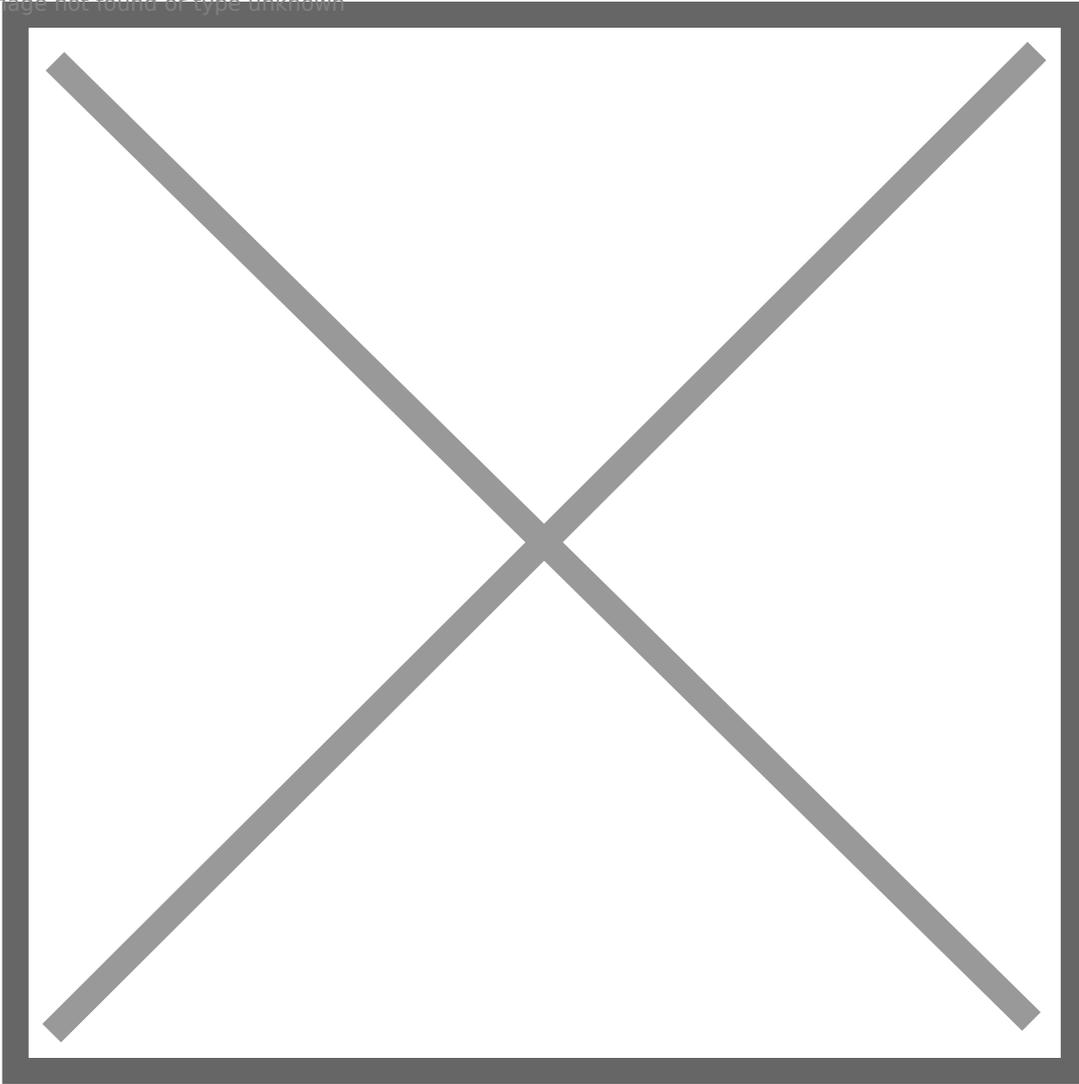
6. You can then select any "Qualifying items" that you would like this upsell to be applied to.

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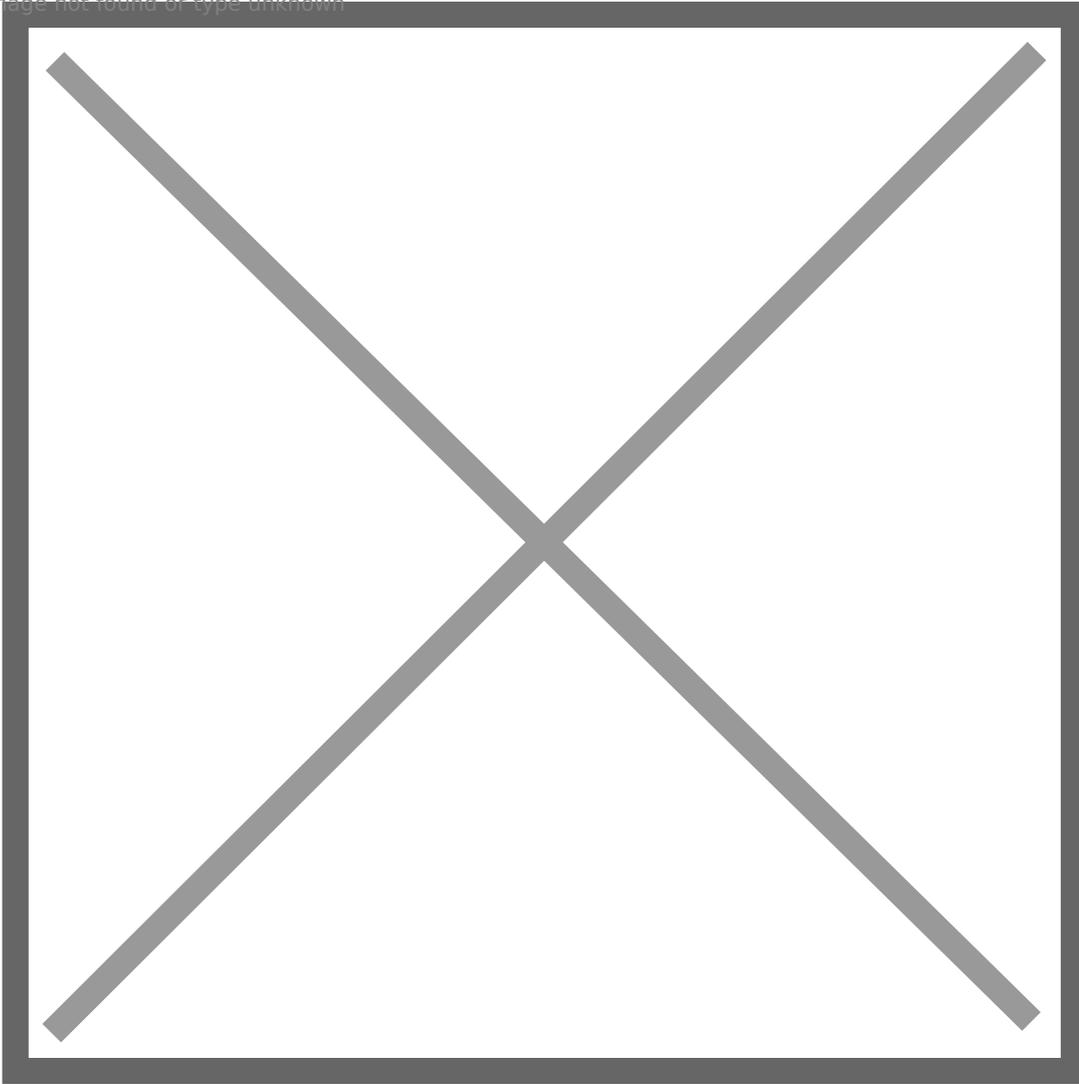
7. In this instance, I want to apply the upsell to the "Arm Chairs" sub-category.

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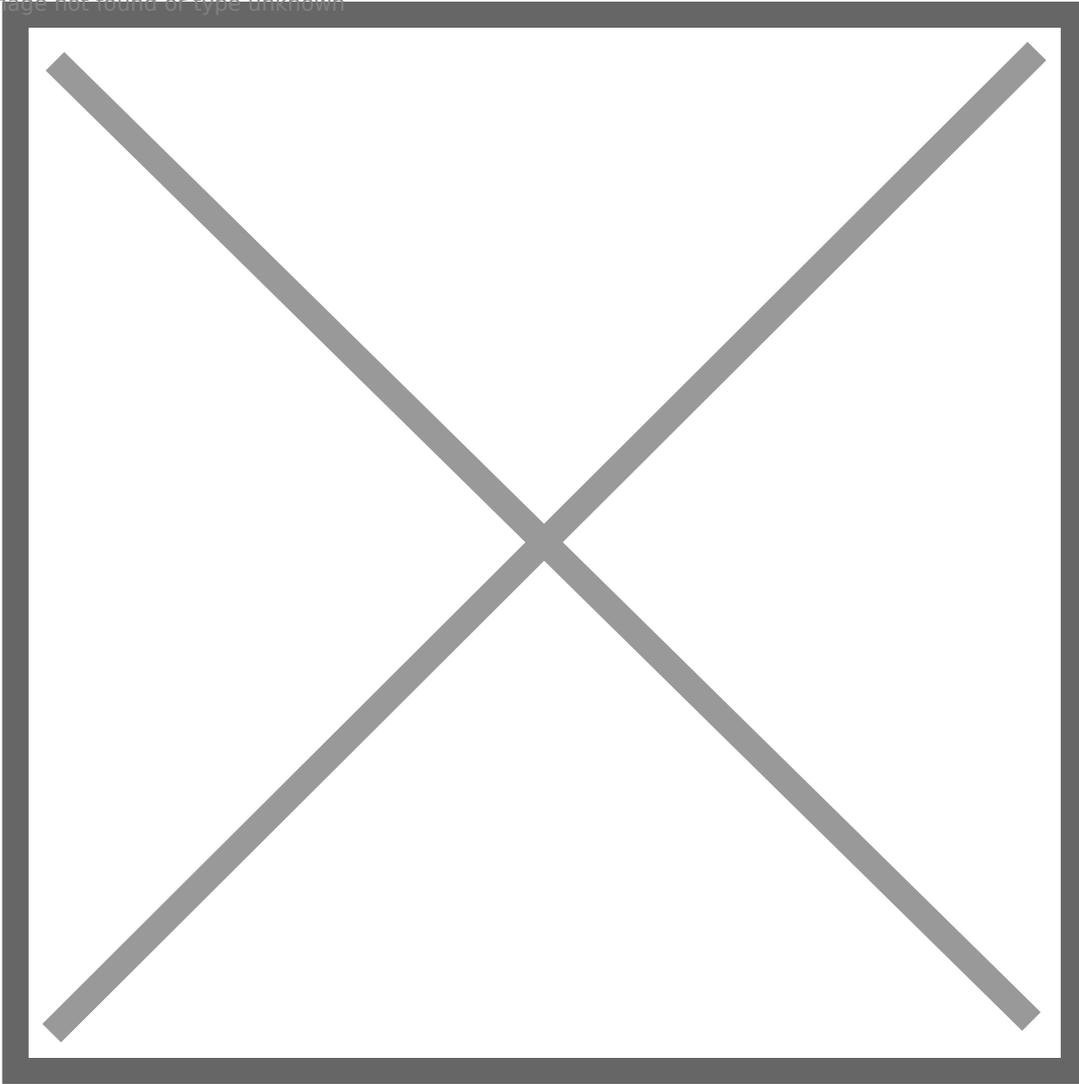
8. Click "Add" to create the cross-selling rule.

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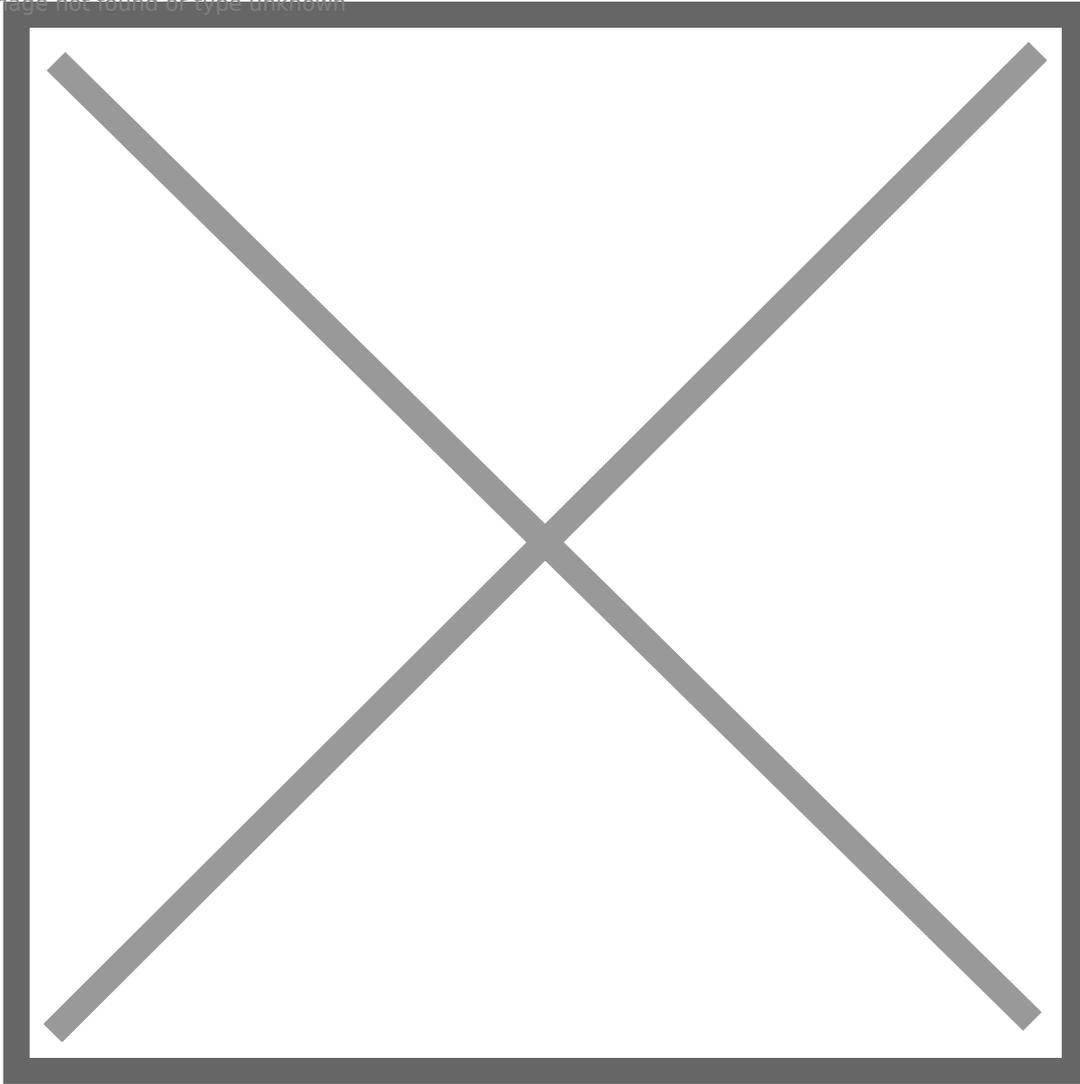
9. Move to the 'Upsell Products' tab.

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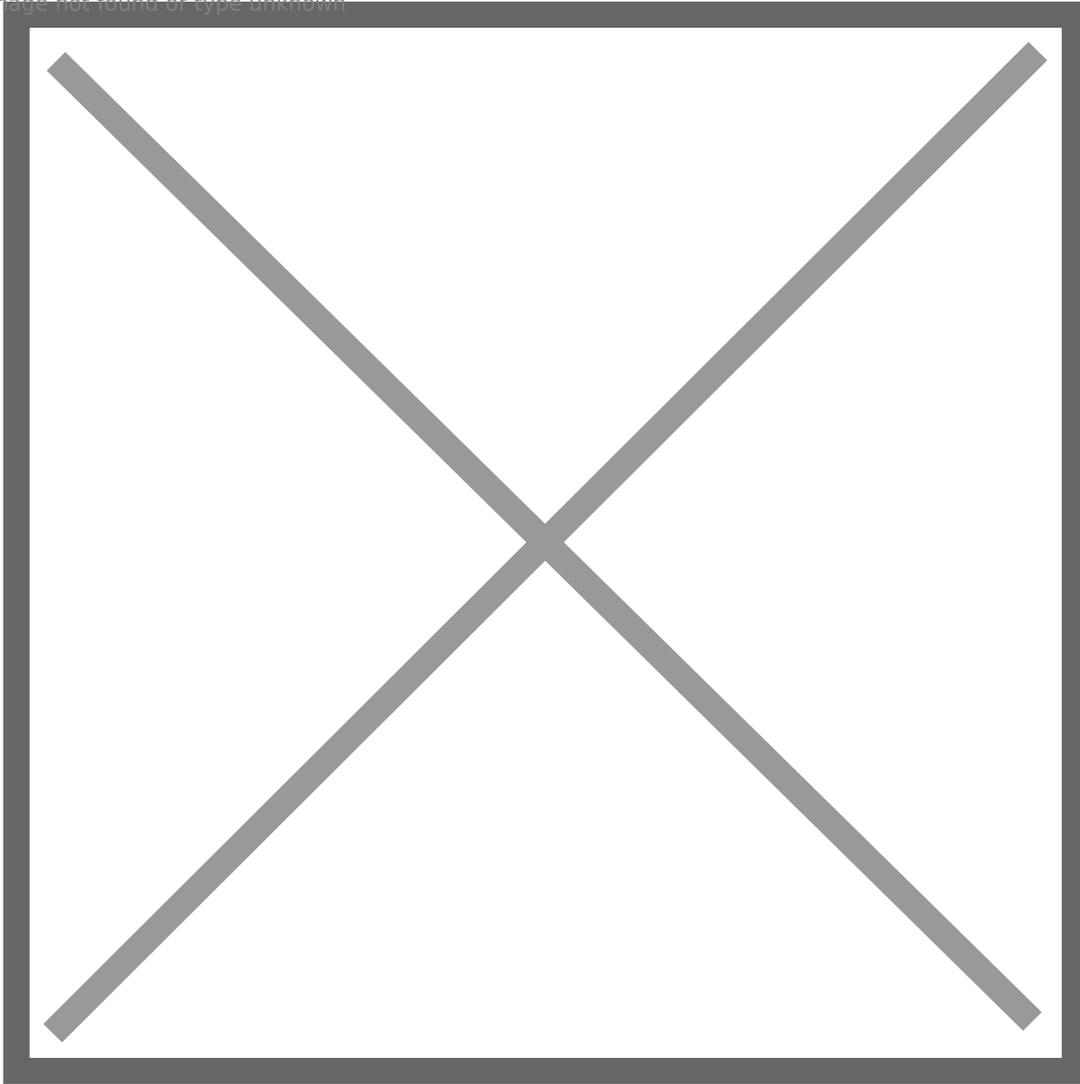
10. Enter the product you wish to offer as the upsell in the search field.

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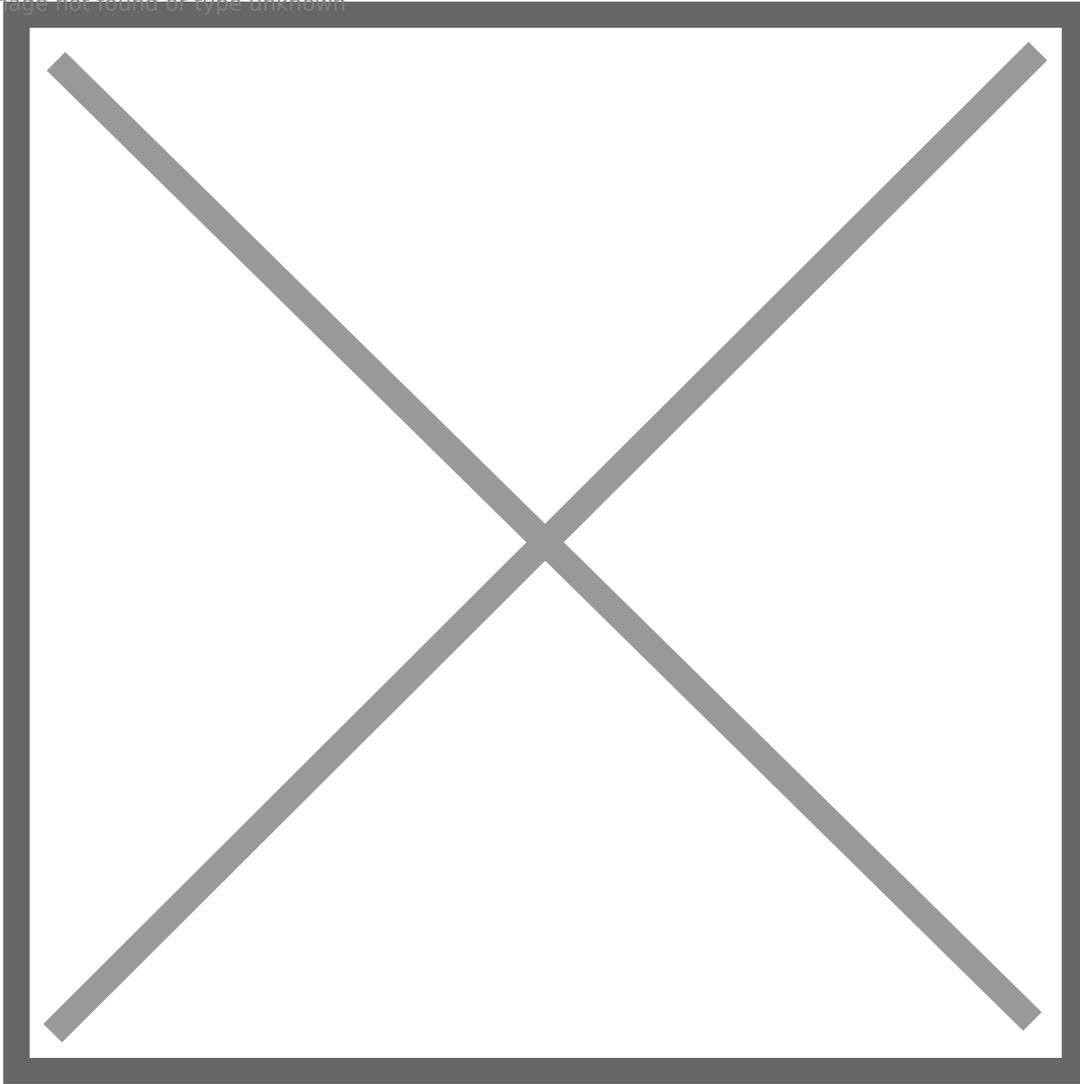
11. In this instance we want to offer a 'Nature Cushion' as an upsell.

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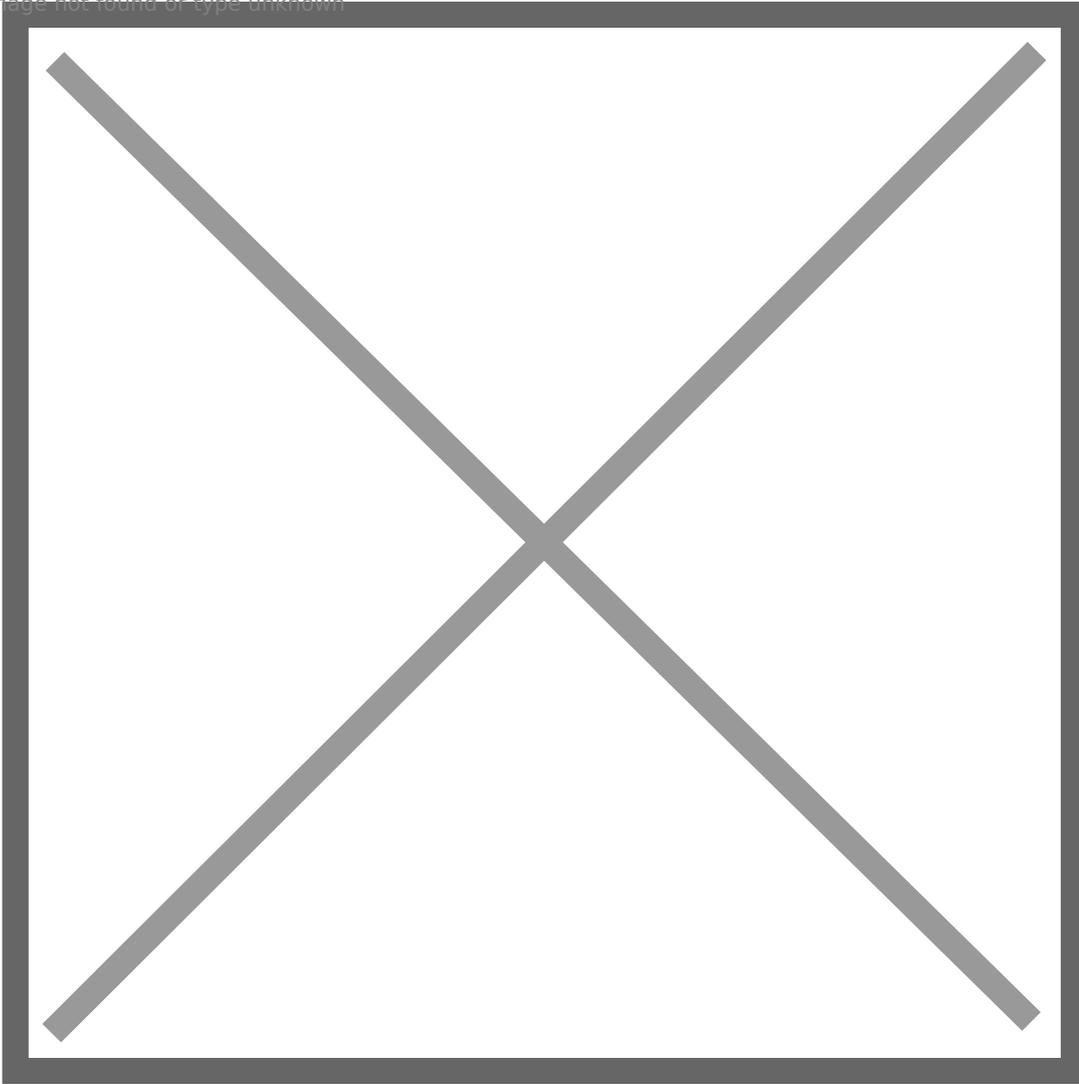
12. Be sure to click the "Update" button when you are happy that you have added your upsell product(s).

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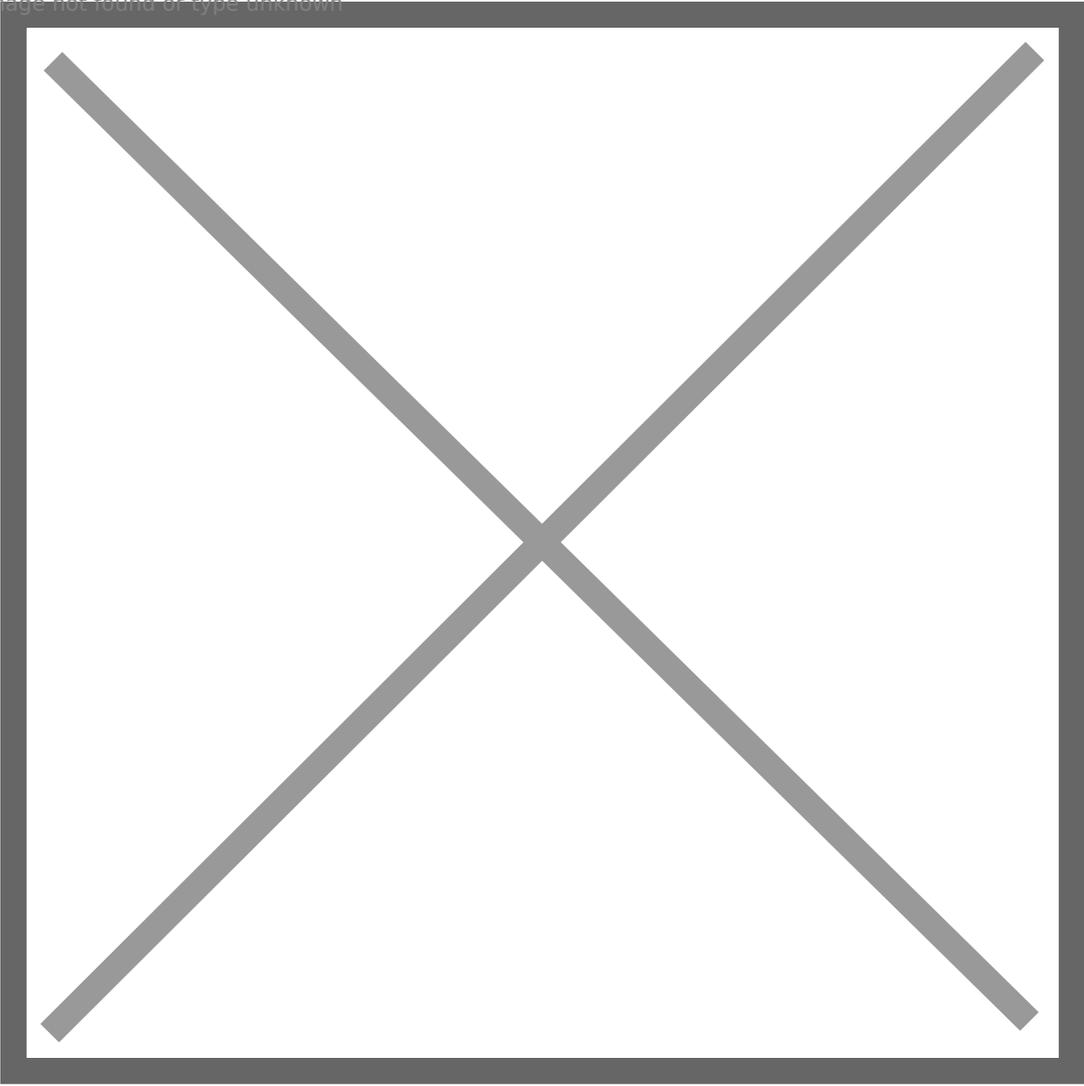
13. Navigate to the front-end of your site and search for a product that falls under the qualifying category - in this case "Arm Chairs".

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14. You will now see the upsell product under "You may also need:".

Image not found or type unknown



# Set Up a Basket Upsell (with Variant Filter)