



# ***HOW TO Set Up Upsale Products***

Revision 1.3



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# HOW TO

## Set Up Upsale Products

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### Introduction

When a customer buys a certain monetary amount of products from your store, you may want to offer one or more companion or upsale products. The offer is made to your customer at checkout.

There is a set of criteria that you can set for an upsale event. These options include the minimum amount a shopper must purchase, offer an upsale only when certain products are purchased, how many upsale products to offer the customer, and how many your customer may choose.

- Miva Merchant selects each item from your upsale list, based on your set of criteria, ensuring that the item in question is in the proper price range relative to the running total in the shoppers basket.
- It will also check that the shopper has not already purchased the item at the regular price.

Use the following procedure to edit a product or add it to the upsale list.

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.
3. Click the triangle next to Upsale.
4. To edit Upsale settings and the Upsold Products list, select the Upsale link. See [“Upsale Link” on page 2](#).
5. To add an upsold product, select the Add Upsold Product link. See [“Add and Edit Upsold Products” on page 3](#).



## Upsale Link

When you select the Upsale link (in the Administration menu) a form is displayed that allows you to edit Settings and Upsold Products.

### Upsale Settings Tab

The Upsale Settings:

1. Enter the number of Upsale products that you want to display to your customers on the Upsale screen.
2. Enter the number of upsale products from which your customers can select on the Upsale screen.

The screenshot shows the 'Upsale' administration page with the 'Settings' tab selected. There are two input fields: 'Upsold Products to Show' with the value '3' and 'Max Number of Upsold Products to Select' with the value '1'. Red arrows labeled '1' and '2' point to these fields respectively.

### Upsold Products Tab

The Upsold Products tab lists your upsale products.

1. To find specific products, enter a selection criteria into the Search box, click the Search Button, and click the Search button.
2. To add a new upsale to your store, click the New Upsold Product button. Refer to [“Add and Edit Upsold Products” on page 3](#) for detailed instructions.
3. To change the upsale criteria for a product, click the Edit button. Refer to [“Add and Edit Upsold Products” on page 3](#) for detailed instructions.
4. To edit the fields that are displayed on the form, click the Edit Here button.

The screenshot shows the 'Upsold Products' tab with a table of products. The table has columns: 'Remove', 'Product', 'Threshold', 'Pricing', and 'Price Percent'. There are two rows of products: P002 and P004. Red arrows labeled 1 through 5 point to various elements: 1 points to the 'Settings' tab, 2 points to the 'Add' button, 3 points to the 'Edit Here' button, 4 points to the 'Edit Here' button for the second row, and 5 points to the 'Remove' checkbox for the first row. A search box is at the top, and a pagination bar at the bottom shows '1-2' and '10'.

Remove	Product	Threshold	Pricing	Price Percent	
✓+ ✓-	Code	Percent			
<input type="checkbox"/>	P002	75.00	Percent of Total	n/a	50.00%
<input type="checkbox"/>	P004	75.00	Percent of Total	n/a	50.00%

When you Click the Edit Here button the form displays the product fields as text boxes. Enter new information into any of the fields and click Update.

Product Code	Threshold Percent	Pricing	Price	Percent
P002	75.00	Percent	0.00	50.00 %
P004	75.00	Percent of Total	n/a	50.00%
1-2				10

- To remove a product as an Upsale, under the Remove column check the box next to the item and click Update.

## Add and Edit Upsold Products

When you select the Add Upsold Product link in the Administration menu, the Add Upsold Product form displays.

### Upsold Product Tab

This tab is identical whether you are adding a new or editing an existing Upsold Product.

- If you are adding an upsold product, enter the product code, or click the Lookup button to select a product from the store's product list.

After you select a product from the Lookup screen, the form reappears with the product code entered.

**Note:** When you edit an upsold product, the product code field cannot be changed.

- Enter Threshold Percentage of Order Total.

The percent of the shopper's running total that this product is priced to be eligible as an upsale product. For example, you set the upsale Absolute Price to be \$25 and you set the threshold percentage to be 50%. The shopper will

then need to have a running total of at least \$50 in their basket for the item to be eligible as an upsale offer. In this example, to determine the relationship between the price of the upsold item and the customer's running total, you would ask, "\$25 is 50% of what dollar amount." The answer is \$50.

Using the same example, you set the upsale Absolute Price to \$25, and want your customer to buy at least \$50 to be eligible for the upsale offer. \$25 is what percent of \$50? It is 50%, so you would enter 50.

Set the Pricing Options of the Upsale product.

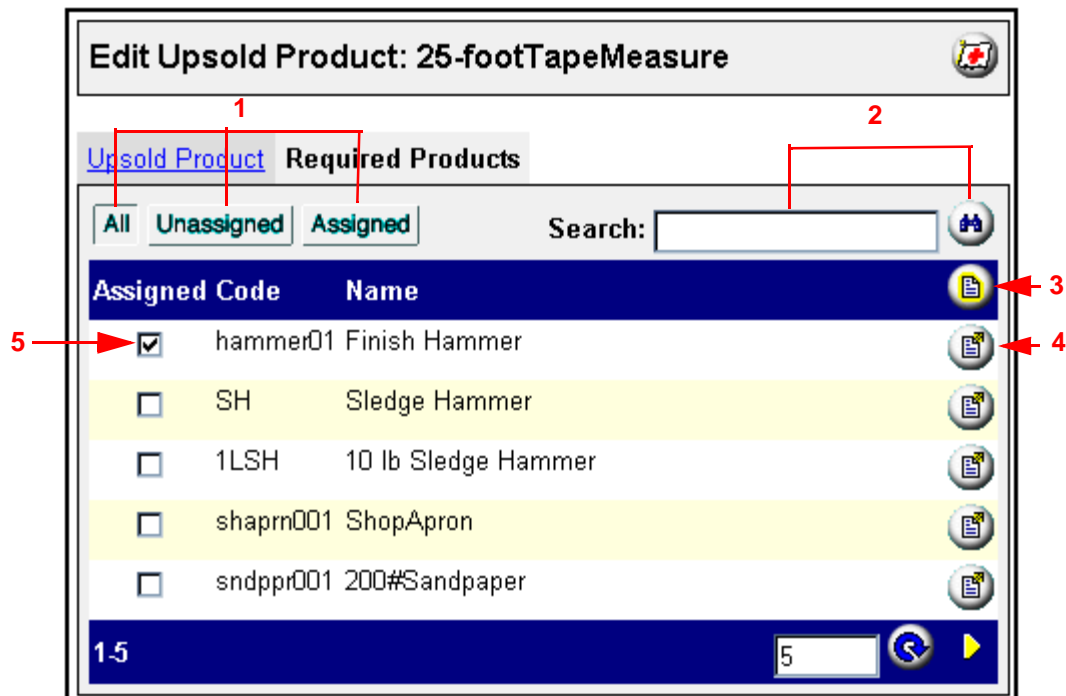
3. To set a fixed price for your upsale product, click Absolute Price and enter the exact upsale price for the item.
4. To set a percentage price for your upsale product, click Percent of Original and enter a decimal number for a percentage of the item's base price.
5. Click Add. You will see a message at the bottom of the form telling you that your item has been added and the Edit Upsold Product form appears.

### Required Products Tab

This tab displays when you edit an existing Upsale Product.

One of the selection criteria for choosing an upsale item is that it must be related to one, several, or all of the items already in the shoppers basket at checkout.

After you add a new Upsold product, the Edit Upsold Product form is displayed with the tab, Required Products.



1. Select a method to view the list.
  - All This displays a list of all products on your product list.
  - Unassigned This displays a list of those products on your product list that you have not assigned as a required product for your upsale item.
  - Assigned This displays a list of those products on your product list that you have assigned as a required product for your upsale item.
2. To locate product(s), enter a selection criteria into the Search box and click the Search Button.
3. To add a new product to your store, click the New Product button . Refer to *HOW TO Add and Modify Products* for a detailed description of this process.
4. To edit a product, click the Edit Product button. Refer to *HOW TO Add and Modify Products* for a detailed description of this process.
5. To identify the required product(s) that your shoppers must purchase to be eligible for this upsale, check the Assigned box next to the required product(s) and click Update.
6. To remove a product from your required list, uncheck the Assigned box next to the item and click Update.

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**Caution:** Do not click Delete to remove an item from the required item list. Clicking the Delete button will remove the upsale product from the Upsale list.

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7. Click Update.