



Smart Upsell

Advanced

User guide

Table of contents

Description..... 3

License 4

Installation guide 5

Settings 6

Product page tab 8

Cart tab 10

Front view 13

Description

Smart Upsell simple allows you to create upsell offers in cart and in product page.

We have done our best to make this module as functional and stable as possible.

Nevertheless, before placing it on your production site, it is your responsibility to test it in pre production environment to verify that it corresponds to your needs and that you understand its behavior.

This module is delivered as Open Source.

All rights are the exclusive and belongs to JSC Invertus.

You can modify it to adapt it to your exact needs.

You are granted one license for unique web site.

You are not allowed to install it on several sites.

You are not allowed to redistribute it, modified or not, in whatever the way of redistribution.

License

The information contained here is provided as a courtesy and is for general informational purposes only. The matters referenced are subject to change from time to time, and individual circumstances may vary. Invertus shall not be responsible for any inaccurate or incomplete information.

Invertus has given extensive attention to the content of this information but makes no warranties or representations about the accuracy or completeness of it. Neither Invertus nor any of its affiliates shall be liable for any costs, losses and/or damages arising out of access to or use of any content of this document.

The Module referred to in this document was developed as a generic solution. Invertus shall not be responsible for any damages that are caused by the module. You can modify it to adapt it to your exact needs. In the event that the Module is modified by a user in any way JSC Invertus shall not be responsible for any damages that are caused by the modified Module. The description of the Module in this document is provided for convenience purposes only, and JSC Invertus makes no warranties or representations about the use or operation of the Module.

Neither Invertus nor any of its affiliates shall be liable for any costs, losses and/or damages arising out of access to or use of the module. You are granted one license for unique web site. You are not allowed to install it on several sites. You are not allowed to redistribute it, modified or not, in whatever the way of redistribution.

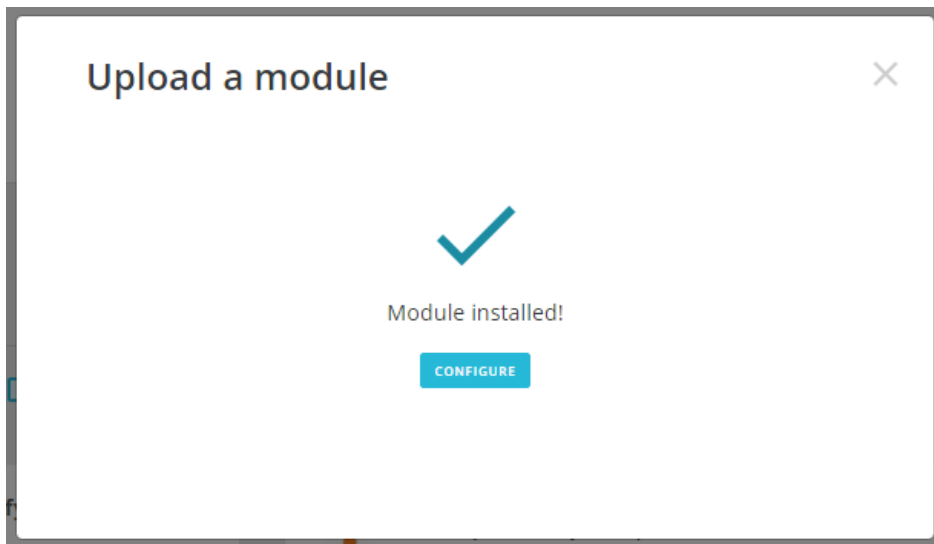
Installation guide

PrestaShop way

- Log into BackOffice.
- Navigate to Modules -> Modules manager menu
- Click on Upload a module button, dialog box will appear

Upload a module

- Drag & drop smartupselladvanced.zip file in to Upload a module dialog.
- You will receive **Module installed!** success message:



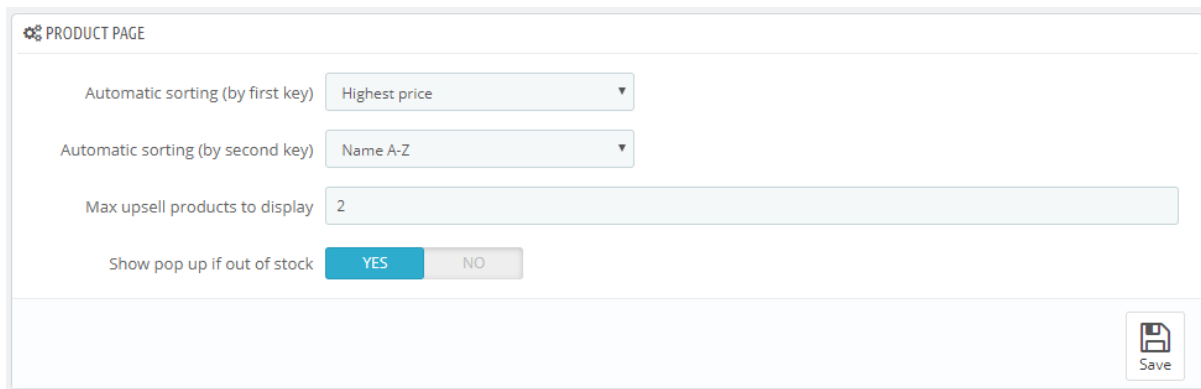
FTP way

- Download smartupselladvanced.zip file to your computer
- Extract it
- Upload *smartupselladvanced* folder into PrestaShop modules directory
- Log into BackOffice
- Navigate to Modules -> Modules Catalog menu
- Type module name in the search.
- Hit the Install button to finish installation

Settings

There are two blocks in settings tab. One block is for product page and another block for cart page.

Product page settings



The screenshot shows the 'PRODUCT PAGE' settings interface. It includes the following elements:

- Automatic sorting (by first key):** A dropdown menu with 'Highest price' selected.
- Automatic sorting (by second key):** A dropdown menu with 'Name A-Z' selected.
- Max upsell products to display:** A text input field containing the number '2'.
- Show pop up if out of stock:** Two radio buttons, 'YES' (selected) and 'NO'.
- Save button:** A button with a floppy disk icon and the text 'Save' in the bottom right corner.

Automatic sorting by first and second keys are used to determine which product to show first as upsell, which product to show second as upsell and so on.

Possible sorting values:

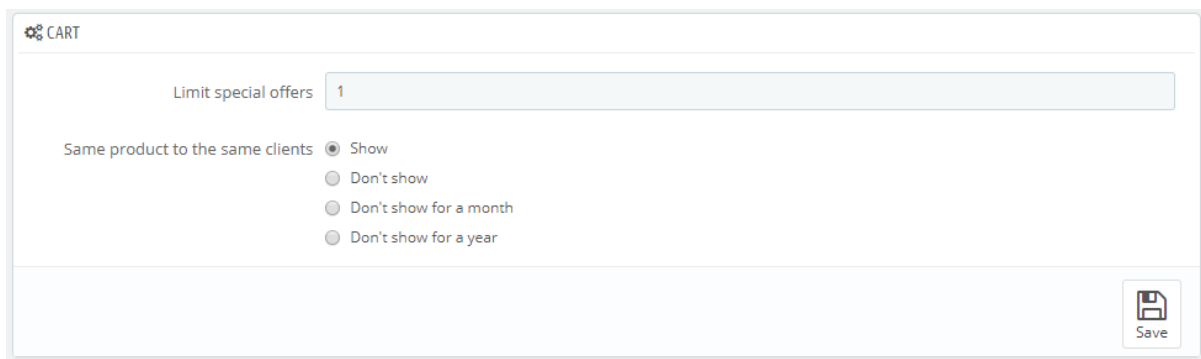
- Highest price;
- Lowest price;
- Highest discount;
- Lowest discount;
- Name A-Z;
- Name Z-A;
- Newest;
- Oldest;
- Highest quantity;
- Lowest quantity.

Products firstly are sorted by the first key then first key is identical they are sorted by second key

Max upsell product to display – determines how many products to show in product page if there are more possible products.

Show pop up if out of stock – by default upsells are shown in a product footer hook, however if products are out of stock, pop-up can be shown to encourage clients to pick similar products instead of the one that is out of stock.

Cart page settings



The screenshot displays the 'CART' settings panel. At the top, there's a 'Limit special offers' input field with the value '1'. Below this, the 'Same product to the same clients' section contains four radio button options: 'Show' (which is selected), 'Don't show', 'Don't show for a month', and 'Don't show for a year'. A 'Save' button is located in the bottom right corner of the panel.

Limit special offer – how many special offers to show for one customer. We recommend to limit to a small number (1-3) not to overwhelm the customer.

Same product to the same clients – if client chooses to ignore the offer what we should do? There are four possible options:

- Show – always show the same offers
- Don't show – never show the same offers
- Don't show for a month – don't show the same offer to the same client for one month.
- Don't show for a year - don't show the same offer to the same client for one year.

Product page tab

PRODUCT PAGE

ID ▼▲	Image	Name ▼▲	Category ▼▲	Quantity ▼▲	Price ▼▲	Active ▼▲	
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
1		Hummingbird printed t-shirt	Men	2400	\$ 23.90	✓	<input type="button" value="Show upsells"/>
2		Hummingbird printed sweater	Women	2091	\$ 35.90	✓	<input type="button" value="Show upsells"/>
3		The best is yet to come Framed poster	Art	1500	\$ 29.00	✓	<input type="button" value="Show upsells"/>
4		The adventure begins Framed poster	Art	1500	\$ 29.00	✓	<input type="button" value="Show upsells"/>

Product page displays a list of all products of the shop with the following items:

- ID – product id;
- Image – image of the product;
- Name – name of the product;
- Category – main category of the product;
- Quantity – total amount of product with all attributes;
- Price – main price of the product;
- Active – is the product visible for the customer.
- Show upsells – action that allows you to manage upsells in the product page for selected product.

Upsells management

When you click Show upsells you will be redirected to new screen.

The screenshot displays the 'Smart Upsell Advanced' interface. At the top, the 'SELECTED PRODUCT' section shows a product card for 'The best is yet to come' Framed poster (ID: 3, Price: 29.00). Below this is a search bar for the main product and navigation buttons for 'Previous product' and 'Next product'. The bottom section is divided into two panels: 'AVAILABLE PRODUCTS' on the left and 'UPSELL PRODUCTS' on the right.

AVAILABLE PRODUCTS

ID	Image	Name	Category	Quantity	Price	Action
1		Hummingbird printed t-shirt	Men	2400	23.90	Set upsell
2		Hummingbird printed sweater	Women	2091	35.90	Set upsell
4		The adventure begins Framed poster	Art	1500	29.00	Set upsell
7		Mug The adventure begins	Home Accessories	295	11.90	Set upsell

UPSELL PRODUCTS

ID	Image	Name	Quantity	Status	Product price	Action
5		Today is a good day Framed poster	900	<input checked="" type="checkbox"/>	29.00	Unset upsell
6		Mug The best is yet to come	300	<input checked="" type="checkbox"/>	11.90	Unset upsell

A 'Bulk actions' button is located at the bottom of the 'UPSELL PRODUCTS' panel.

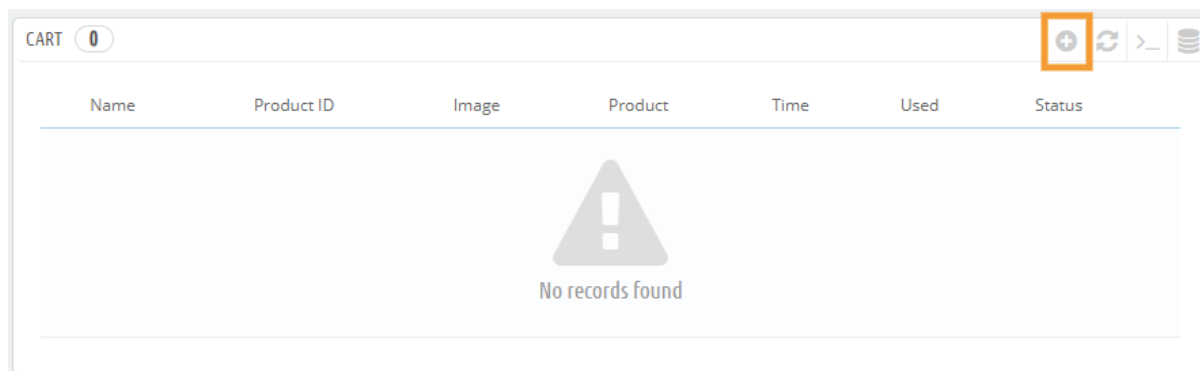
Top block shows information about you selected product. It also allows to move you forward / backward between products and to search next product you want to set upsells to.

Bottom left block shows all products of the shop (except upsells).

Bottom right block shows product that are set as upsell in product page for selected product.

Cart tab

When you first-time open Cart tab it will be empty. If you want to add new upsells, you'll need to click the plus sign.



When you click the plus sign, upselling creation form will load.

The screenshot shows a 'CREATE/EDIT SPECIAL OFFER' form. At the top, it says 'CREATE/EDIT SPECIAL OFFER' and 'Current server date: 2019-06-26 08:06:04'. The form has several sections: 1. 'Name' field with a red asterisk. 2. 'Active' toggle with 'YES' and 'NO' buttons. 3. 'Main product' field with a red asterisk and a note 'Type at least 3 letters and select product from dropdown list'. 4. 'Type' section with radio buttons for 'Upsell' (selected) and 'Crosssell'. 5. 'Time limit' section with radio buttons for 'Unlimited' (selected) and 'Limited'. 6. 'Special product' field with a red asterisk and a note 'Type at least 3 letters and select product from dropdown list'. 7. 'Valid only in specific interval' toggle with 'YES' and 'NO' buttons. 8. 'Valid only for specific groups' section with a checkbox and a table:

ID	Group name
<input checked="" type="checkbox"/>	1 Visitor
<input checked="" type="checkbox"/>	2 Guest
<input checked="" type="checkbox"/>	3 Customer

 9. 'Discount' section with a percentage input field set to '0' and a dropdown menu set to 'Percentage'. At the bottom, there are 'Cancel' and 'Save' buttons.

Name – this meant only for you to better manage special offers.

Active – you can disable/enable orders.

Main product – product that will have special offer. You have to start typing and products will be suggested to you.

Type can be Upsell or cross-sell. If you choose upsell, when product (main product) existing in the cart will be removed and replaced with special offer (special product). If you choose cross-sell, special product will be added to the cart next to other products that were already in the cart.

Time limit – how long is the offer shown to the customer. Default is unlimited, however if you want to create urgency you can limit how long the offer will be shown in the cart. Default is 180 seconds (3 minutes).

Special product – product that will be offered as a special offer. You have to start typing and products will be suggested to you.

Valid only in specific interval – You can make special offer valid only in the selected interval e.g. one week or one month. By default it's set to no, but when you set to yes, additional fields will appear to choose date and time.

Valid only in specific interval ☒ YES ☐ NO

Valid from 2019-06-29 00:00:00 %

Valid to 2019-06-29 00:00:00 %

* Valid only for specific groups

Discount

Time 00:00:00

Hour

Minute

Now Done

Cancel

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Important: module will use server time for start and end date/time of special offers. Server time might be different from your local time.

Valid only for specific groups – You can make special offer just to a selected list of groups or one group of your VIP customers if you want. By default all groups will be selected.

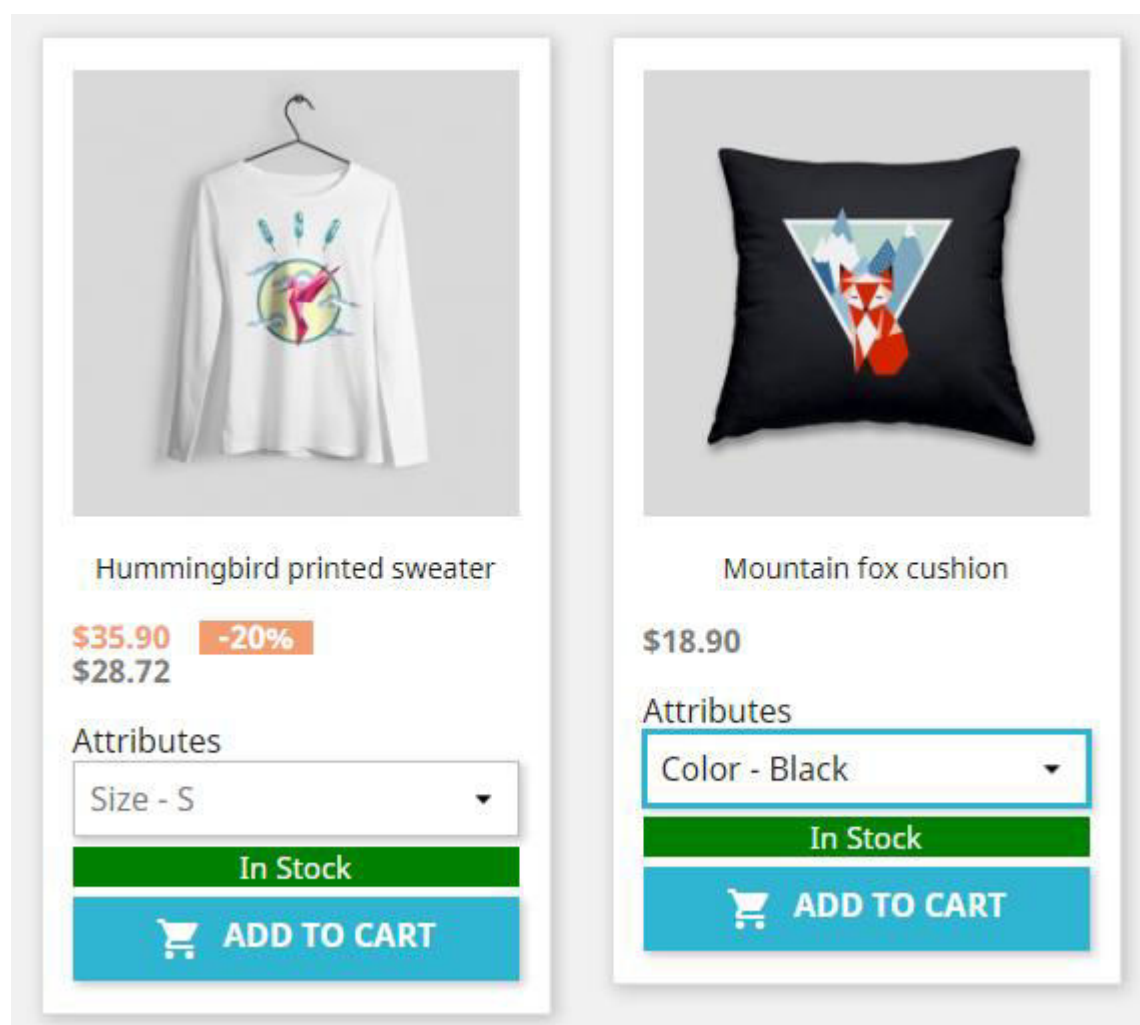
Discount – Amount of discount for special offer. Discount can be set in percentages or default currency of your shop.

Front view

There are a few cases where customer will see your upsells.

Product page


If the product is in stock upsells set in Product page tab will be shown in product footer hook which is usually can be found on the bottom of the page.



If product is out of stock, when visiting, product pop-up will appear.

[Contact us](#)[Sign out](#) John DOE [Cart \(0\)](#)

Item is out of stock at the moment. Would you be interested in similar products?✕




Hummingbird printed sweater

~~\$35.90~~ **\$28.72** -20%

Size: S ▾ Quantity: 1 ▴ ▾

[VIEW](#) [ADD TO CART](#)




Mountain fox cushion

\$18.90

Color: ☐ ☒ Quantity: 1 ▴ ▾


[VIEW](#) [ADD TO CART](#)



Quantity 1 ▴ ▾ [ADD TO CART](#)

⚠ There are not enough products in stock


Share [f](#) [t](#) [G+](#) [p](#)



Cart page

In the cart page special offers will appear below list of products.

SHOPPING CART



Mountain fox notebook

\$12.90


Paper Type: Ruled

1

^


v

\$12.90



< Continue shopping

Special offer only for you for limited time: buy **Brown bear notebook** instead of **Mountain fox notebook**



Brown bear notebook

120 sheets notebook with hard cover made of recycled cardboard. 16x22cm

Size:

Ruled


Offer time

2m 55s

\$12.90

-10%

\$11.61



ACCEPT CHANGE

We hope the best experience for you and for users using this module.

Page 15 of 15

