



# InstaMember USER'S GUIDE

## Setting Up 1 Click Upsell Options

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This guide will help you learn to configure the **1 Click Upsell Options**. This contains detailed information on the settings and options that will enable you to get upsell and downsell features and option to the products that you will be having in your InstaMember powered site.

**Note:** This feature can be used only if the user is using direct payments.

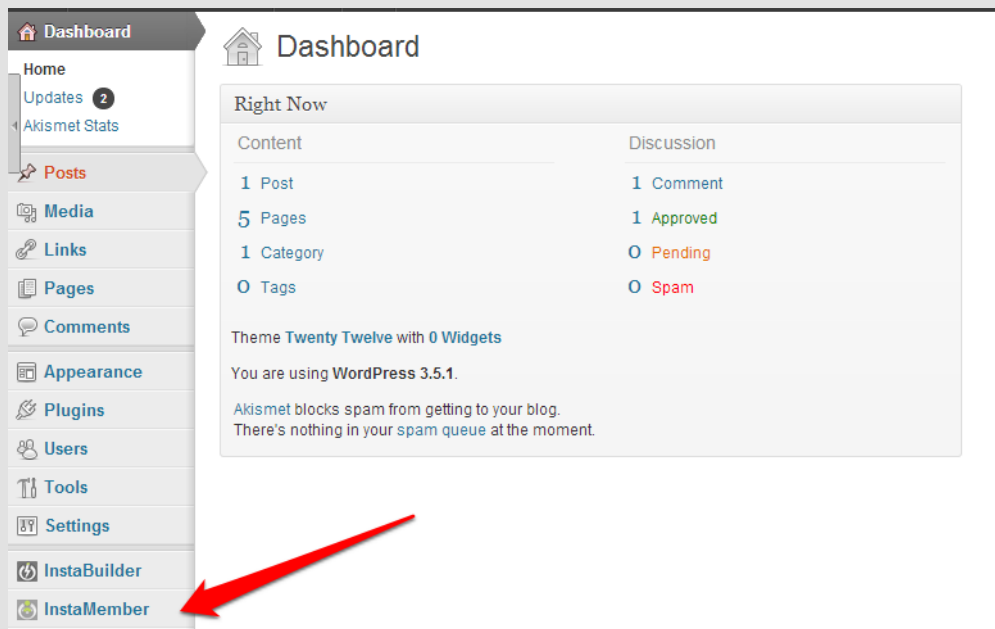
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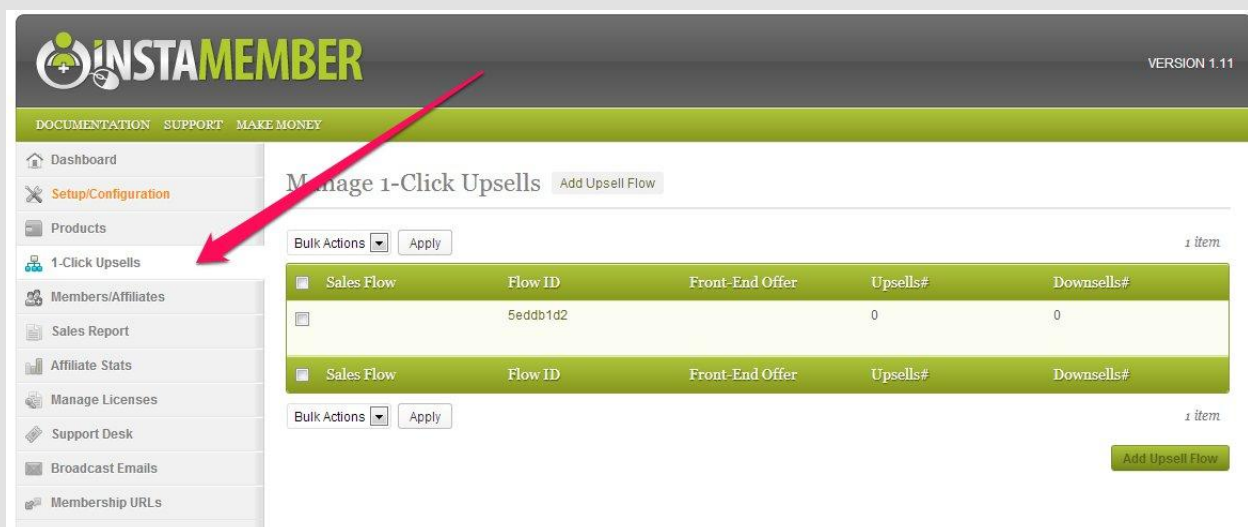
## Setting Up 1 Click Upsell Options

*This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site and that you already have setup your products and the payment options already.*

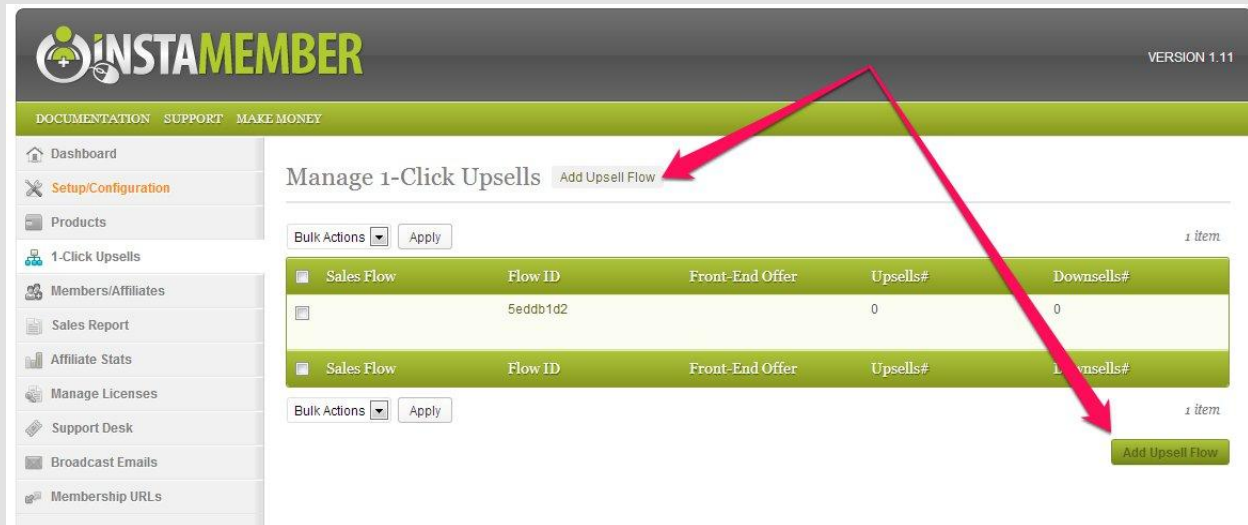
1. Navigate to your Instamember Dashboard by clicking the **Instamember** menu option on your wordpress dashboard.



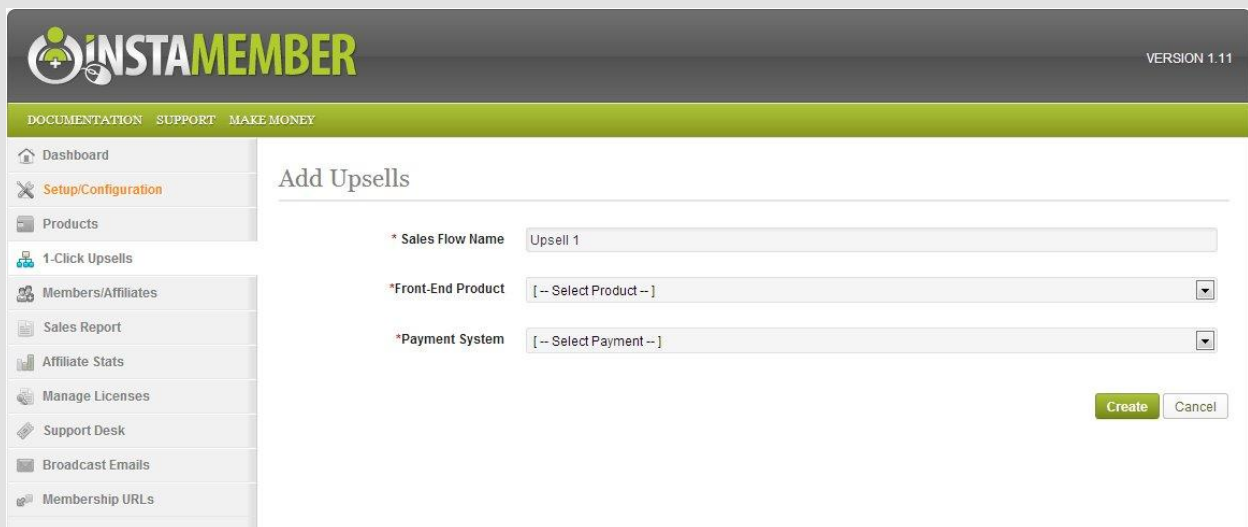
2. Click the '**1 Click Upsells**' option.



3. Click the "Add Upsell Flow" link just beside the Manage 1-Click Upsells title or click the green button on the bottom part of the page to start adding upsells to your products.



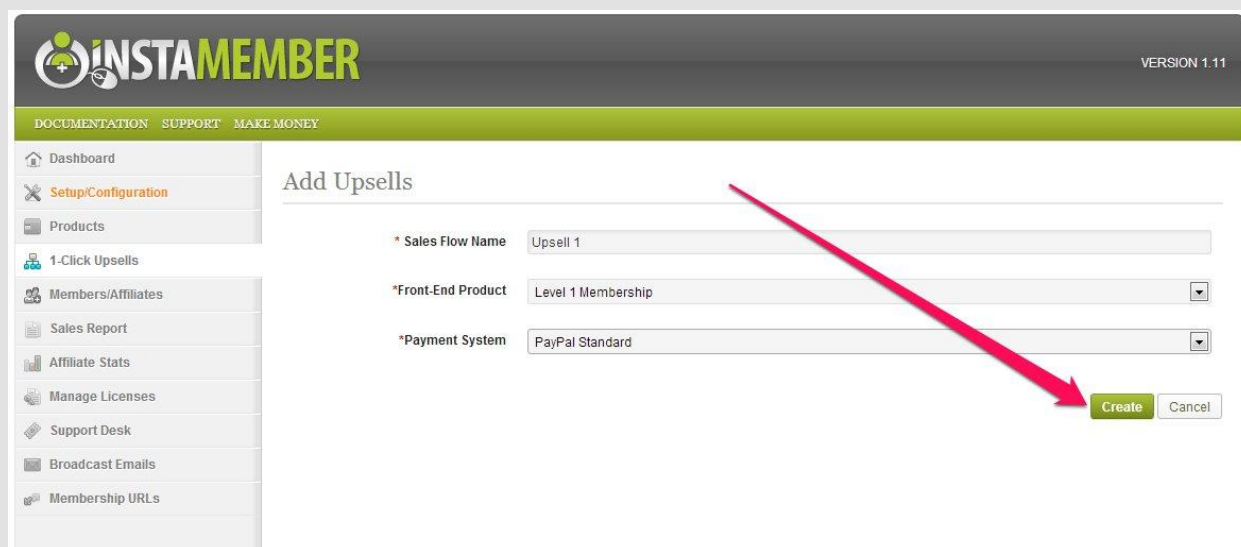
4. Once done, you will be taken to a page that looks like the image below. You will then have to provide data on the fields available.



- The **Sales Flow Name** should be filled out with a unique name of the upsell for you to easily recognize and distinguish it apart from the rest of the upsells if more than one.
- The **Front-End Product** would be the product that offers the upsell.
- The **Payment System** is a dropdown the lists all the payment methods you have configured on the payment

options page. It is preferred that you have this setup first before setting up upsells.

5. Once you are done filling out the required fields, click the create button.



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Dashboard Setup/Configuration Products 1-Click Upsells Members/Affiliates Sales Report Affiliate Stats Manage Licenses Support Desk Broadcast Emails Membership URLs

### Add Upsells

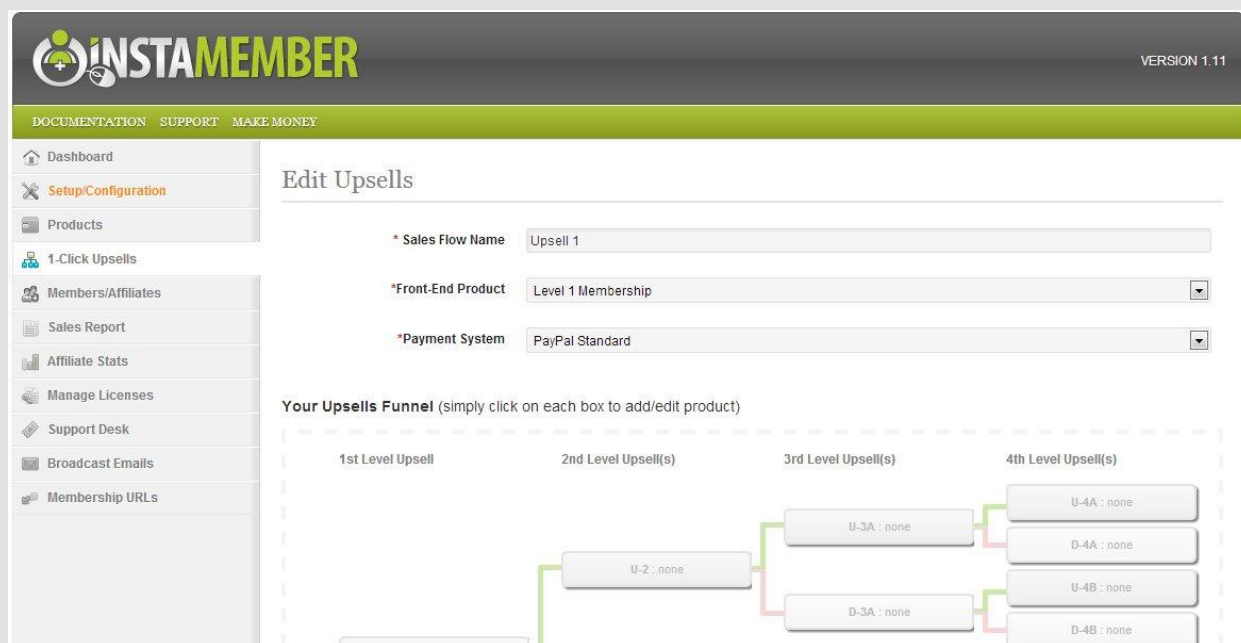
\* Sales Flow Name Upsell 1

\*Front-End Product Level 1 Membership

\*Payment System PayPal Standard

Create Cancel

6. After clicking the create button, you should see a page similar on the image below.



U-1 : none

D-2 : none

U-3B : none

D-3B : none

U-4C : none

D-4C : none

U-4D : none

D-4D : none

Important: If you choose "PayPal" or "Payza," then your upsell funnel can ONLY have one subscription product. Also, you can ONLY add your subscription product to the "1st Level Upsell." This limitation is because both PayPal and Payza CANNOT process payments for multiple subscription products at once.

Payment Links

Update Cancel

**Important:** If you choose "PayPal" or "Payza," then your upsell funnel can ONLY have one subscription product. Also, you can ONLY add your subscription product to the "1st Level Upsell." This limitation is because both PayPal and Payza CANNOT process payments for multiple subscription products at once.

- To start setting up upsells, click the box under 1<sup>st</sup> Level Upsell (U-1: None). Note that currently the boxes are labeled none after the Upsell level indicating that there is not yet a product upsell set.
- Once clicked, a pop up window will appear where you can set up the first level product upsell and the corresponding sales page for it. If the sales page text field is left blank, the product's sales page will then be used instead as the default sales page.

**Upsell #1 Settings**

Select Product  
Pro Membership

Sales Page URL (optional)  
http://

If you leave this sales page URL setting to blank, default sales page URL from the selected product will be used.

Save & Close Cancel

1st Level Upsell

2nd Level Upsell(s)

3rd Level Upsell(s)

4th Level Upsell(s)

U-1 : none

U-2 : none

D-2 : none

U-3A : none

D-3A : none

U-3B : none

D-3B : none

U-4A : none

D-4A : none

U-4B : none

D-4B : none

U-4C : none

D-4C : none

U-4D : none

D-4D : none

Important: If you choose "PayPal" or "Payza," then your upsell funnel can ONLY have one subscription product. Also, you can ONLY add your subscription product to the "1st Level Upsell." This limitation is because both PayPal and Payza CANNOT process payments for multiple subscription products at once.

Payment Links

Update Cancel

- Once done with the setup, click **Save & Close** button to save the settings for the first level and notice that the once **None** beside U-1 will now be replaced by the name of the selected product for upsell.



10. You will observe that as the upsell level increases, each is paired with a downsell (this is an instamember feature that enables the customers that would decline the upsell offer to be redirected to a page with a different offer which would be more affordable or an alternative for the upsell). At level 4 you have the option to add up to 4 products for upsell and downsell.
11. The **Payment Link** options contains fields that is prepopulated with links to the payment link of the front-end product upsell and the downsell payment link as well.

### Payment Links

Front-End Payment URL:

Upsells/Downsells Payment URLs:

No Thanks URL:

12. Once done with the setup, you can go ahead and click the update button to save all the changes and updated settings you have made.



## **BROUGHT TO YOU BY: SUZANNA THERESIA**

If you have any questions or input on how we could improve this manual, please contact our support team at <http://asksuzannatheresia.com>