



Working checklist

Shopify funnel checklist: offers, cart and post- purchase

Test offers, thresholds, discounts, gifts, bundles and post-purchase steps before you switch them on, then decide what to keep, fix or pause.

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How to use this checklist

An extra offer works when it helps someone complete a sensible purchase and leaves a sustainable margin. Before I add a second proposal to the cart, I check that the first is clear, available and easy to buy. Use the checklist to review an existing funnel or to test a new one. The result is a reasoned decision on which offers to activate, fix or pause.

Work on one campaign or product group at a time. Examples are illustrative: amounts and outcomes are not customer cases. Available features depend on the store's configuration, apps, plan and channel, so check the store's actual setup before you choose a solution.

Working record

Field	Complete here
Store, market and language	...
Offer, products and variants	...
Test owner and date	...
Theme, apps and configuration tested	...
Objective and observation period	...
Minimum margin and stopping condition	...

Give each of F01–F10 one of four outcomes: **OK** when evidence supports it, **NEEDS CORRECTION** when the expected result fails, **NOT VERIFIED** when evidence is missing, **NOT APPLICABLE** with a reason. A setting saved in the admin stays unverified until you have seen it work in the relevant customer journey.

Priorities set the order of work. P0: prices, charges, availability and purchase blockers. P1: errors in offer logic and measurement. P2: editorial improvements and experiments. Record the results in the test log (F10).

F01 · Choose a relevant offer (P1)

Start from the customer's need. A cross-sell complements the purchase; an upsell presents a better alternative and explains the difference. If the link needs a long justification, rethink the proposal before showing it.

- ☐ Every main product has a written reason for its recommendation.
- ☐ Accessories, alternatives and replacements are clearly distinguished.
- ☐ Variant, compatibility, availability and market are correct.
- ☐ Customers can continue without accepting the offer.

For an outfit, check the combination and sizes. For a skincare routine, check what each product does and the approved instructions. For a digital course, check what is included, access and prerequisites. Do not use a set to hide irrelevant items. For subscriptions, state frequency, recurring amount and how to manage it before acceptance.

Closing F01. Keep the product → offer → reason table, the URL and a screenshot of the actual recommendation. Close the check when the content shown follows the commercial rule, including for a sold-out variant or a product that cannot be sold in the chosen market.

F02 - Check the margin before discounting (P0)

Start from revenue after discounts, excluding taxes and net of the costs of completing the order: goods, packaging, fees, the store's share of shipping, any gift and the expected variable cost of returns. If a cost is an estimate, say so.

Illustrative example: offer revenue excluding tax €80, goods €35, packaging and handling €4, fees €2, shipping paid by the store €6, expected return cost €3. That leaves €30 before acquisition and fixed costs. After €12 of allocated acquisition cost, €18 remains, which is not the company's net profit.

- ☐ The calculation includes the discount combination that is most generous to the customer among those allowed.
- ☐ An owner has approved the minimum margin and how exceptions are handled.
- ☐ The cost of the gift is counted even if the customer pays zero for it.
- ☐ Higher order value is judged together with margin, conversion and returns.

Worst permitted case. Revenue ... / variable costs ... / remaining margin ... / approval If the margin cannot be calculated, the offer is not ready.

F03 - Test recommendations before purchase (P1)

Open a product page on a phone and finish selecting variants. The recommendation must stay distinct from the main buy button and must not cover the price, availability or other decisive information.

Check what the theme supports first. Shopify Search & Discovery can help manage recommendations, but showing them needs a compatible theme and blocks. Installing an app does not prove customers see the intended module.

- ☐ The recommended product opens the right page or is added with the stated variant.
- ☐ Price and conditions are readable before it is added.
- ☐ With an empty list, the module leaves no stray heading or gap.
- ☐ Keyboard and touch users can use or skip the proposal.

Note down. Page ... / device ... / variant ... / observed behavior If you choose a static recommendation, assign someone to update it when the catalog changes.

F04 - Test the cart and thresholds (P0)

A message such as “You're €8 away from free shipping” must use the same calculation basis as the real rule. Check whether the threshold counts discounts, excluded products, currency and destination. A progress bar that is right in the first cart can become wrong once a code is applied.

Test amounts below the threshold, exactly at it and above it; then remove an item and change quantities. Repeat with an allowed discount. The cart drawer and cart page must show matching amounts, and checkout must confirm them for the test address.

Scenario	Expected result	Observed result	Evidence
Below threshold	Benefit not active	...	...
At threshold	Rule applies as specified	...	...
Discount or item removed	Message and benefit recalculate	...	...
Excluded destination	No benefit promised that does not apply	...	...

Closing F04. Do not close the check if the bar promises a benefit that checkout denies. A plainly written condition beats an inaccurate dynamic indicator.

F05 - Tiered discounts and combinations (P0)

Write the rule in commercial terms first: eligible products, required quantity or spend, benefit, customers, markets, dates and exclusions. Then compare it with the configuration saved in Shopify.

Discounts do not combine on their own: they apply together only if each one's settings allow it, by class (product, order, shipping). Shopify allows up to 25 active automatic discounts, apps included, and a customer can use up to 5 product or order codes and 1 shipping code per order. Two product discounts on the same line item need Shopify Plus. Product discounts apply first, then order discounts on the reduced subtotal, then shipping. Several percentage order discounts are each calculated on the original subtotal: 10% and 20% off €100 is €30 off. If discounts cannot combine, Shopify applies the best option for the cart. Combinations work on the online store, the Storefront API and POS, not on external checkouts such as Facebook, Instagram or Google. Source: Shopify Help Center, discount combinations.

- ☐ Moving between tiers gives the expected price.
- ☐ Allowed and excluded codes have been tested.
- ☐ Start and end times are checked in the store's time zone.

- ☐ Reducing the quantity removes a benefit no longer earned.
- ☐ The copy does not add percentages calculated on different bases.

For example, “two items: benefit A; three items: benefit B” needs tests at one, two, three and four units, with excluded products. Record the final total, not just the discount label.

F06 · Gifts and Buy X Get Y (P0)

With the native Buy X Get Y discount, customers must put product Y in the cart themselves: the discount does not add the gift. If you promise automatic addition, you need a separate feature, tested on the store. For the minimum threshold only product prices count, not shipping or taxes, and items count at full price. If the gift runs out of stock, the products show as sold out and the discount cannot be used. Source: Shopify Help Center, Buy X Get Y.

Test a full sequence: add X, add Y, check the discount, remove X and read the new total. If Y stays as a paid item, customers must be able to see that and remove it easily. Also test multiple quantities, the per-order limit, a sold-out gift and other codes.

Closing F06. No gift is promised that is not available, no paid item is added unclearly, inventory is correct and messages update. Keep the sequence of tests, not one screenshot of the final cart.

F07 · Bundles, components and inventory (P0)

A product called “kit” does not manage its components' stock by itself. For fixed bundles and multipacks, consider Shopify Bundles, Shopify's free app, available on all plans. A fixed bundle can have up to 30 components. Stock is tracked as a total, not by location, and orders list the SKUs of the individual items. The bundle price does not update when a component's price changes. A product-specific discount must include the parent bundle product, or it will not apply. For other logic, check the requirements of the solution you choose. Source: Shopify Help Center, Shopify Bundles.

- ☐ Customers see components, quantities, variants and the total price before buying.
- ☐ Set availability follows the availability of the required components.
- ☐ The order and fulfillment show what to ship.
- ☐ Cancellation, refund and restocking have verified behavior.
- ☐ Channels, subscriptions or customizable compositions are in the test if you use them.

Test the component with the least stock: if each set needs two units, check how many sets can be bought. Repeat after a single sale of the same component. For digital content, check that every promised access is delivered and that revocation follows the approved conditions.

Note. The Shopify Bundles page does not describe how refunds, returns and restocking behave. Test them on the store.

F08 · Post-purchase offers and later communications (P0/P1)

Keep the offer after payment apart from the thank-you page and the order status page: they are different surfaces. Shopify supports post-purchase offer apps and lets you use only one at a time for this feature. A checkout customization does not automatically apply here. Source: Shopify Help Center, checkout apps.

Before you activate an offer, check the app's requirements, plan, payment methods, currencies and exclusions. Then test acceptance and rejection. Customers must know the extra price, any shipping and what they will be charged; declining should lead to the confirmation page as usual.

- ☐ If accepted: order, total, confirmation received, inventory and fulfillment match.
- ☐ If declined: nothing was added.
- ☐ The chosen post-purchase app is the only one selected in checkout settings.

A saved configuration without an observed eligible order counts as NOT VERIFIED.

Operational emails explain the order. A later promotional campaign needs separate handling of recipients, preferences and applicable conditions. If you offer a voucher with an expiry, write a clear date and test it before and after the deadline.

F09 · Measure value as well as revenue (P1)

Before activation, define who can see the offer and which event proves acceptance. Do not divide extra purchases by all store sessions if only part of the audience can see the module.

Record eligible exposures, acceptances, extra revenue, contribution margin, main-journey conversion and returns. Keep the definitions identical in the baseline and comparison periods. A rising AOV can come from product mix or from fewer small orders.

Hypothesis to complete. “Showing ... to ... should improve ... without worsening ... beyond” Note concurrent promotions, stock changes and traffic shifts.

A before/after comparison gives an indication. To attribute a cause you need a proper experiment, when volume allows.

F10 · Test log and activation decision

Check	Outcome and evidence	Correction needed	Owner and deadline
F01–F03: relevance, margin, recommendations	...	...	...
F04–F06: cart, discounts, gifts	...	...	...
F07–F08: bundles and post-purchase	...	...	...
F09: measurement	...	...	...

Split rows when checks have different outcomes.

Closing the checklist. All applicable P0 checks are verified; P1 issues are fixed or excluded from the configuration being activated; exceptions have an owner; configuration and evidence can be identified; a procedure to disable the offer exists; the date of the first review is set.

Decision ACTIVATE / FIX AND RETEST / PAUSE **Reason** ... **Approval and date** ... **First results review** ...

When you reopen the checklist, start from what changed since the tested configuration. A new price, app, theme or market may need fresh tests even if the offer keeps its name.

Sources

- Shopify Help Center, discount combinations: <https://help.shopify.com/en/manual/discounts/discount-combinations>
- Shopify Help Center, Buy X Get Y discount: <https://help.shopify.com/en/manual/discounts/discount-types/buy-x-get-y>
- Shopify Help Center, Shopify Bundles: <https://help.shopify.com/en/manual/products/bundles/shopify-bundles>
- Shopify Help Center, checkout apps: <https://help.shopify.com/en/manual/checkout-settings/customize-checkout-configurations/checkout-apps>

Sources checked on 17 October 2026.