



Practical guide

Shopify funnel guide: upsell, cross-sell and bundles

Offers, margins and the buying journey: how to design, test and measure a sales funnel on Shopify.

Francesco Guiducci

Edition October 2026 · English

ifgdigital.com

For personal or internal business use; unauthorized distribution is prohibited.

Contents

How to use this guide	3
1. Start with the customer's task	3
2. Build relationships in the catalogue	4
3. Choose the right moment for each offer	4
4. Write an offer that supports a decision	5
5. Calculate contribution before choosing a threshold	5
6. Configure discounts, bundles and availability	6
7. Separate checkout, post-purchase and communications	6
8. Implement and test the journey	7
9. Measure the journey, not just the customers who accept	7
10. Finish with a reasoned decision	8

How to use this guide

An extra offer earns its place when it helps the customer finish a decision. A compatible case can solve a problem; three pop-ups interrupting payment can create one. Before you look for an app to raise basket size, work out which purchase you are helping someone make and what is left after you fulfil it.

The guide follows the design process: product selection, offer presentation, configuration, testing and reading the results. The numerical examples are invented to explain the method. Available features depend on your store, theme, apps, market and payment setup. The funnel checklist reviews a configuration that is already built; this guide develops the reasoning that comes before it.

1. Start with the customer's task

A funnel is the journey from first interest to purchase and use of the product. Customers do not all see the same pages: someone clicking an ad lands directly on one variant, a returning customer goes straight to the product, and a gift buyer has different questions.

Pick one specific journey and describe it in a sentence: "Someone buying this coffee machine wants to start using it without hunting for compatible accessories." That sentence separates a useful complement from a product you simply want to clear from stock.

Three types of offer do different jobs:

Offer	Question it answers	Example to validate
Upsell	Would a different version meet the need better?	Larger capacity for frequent use
Cross-sell	Is something missing to use or maintain the product?	Replacement part compatible with the selected model
Bundle	Would buying these together make the choice simpler?	Kit with clearly stated components and quantities

An upsell replaces or improves the choice; a cross-sell adds a complement. If you present both as "add", the customer can end up with two alternative products in the basket. Word the action precisely: "Choose the 1-litre model" and "Add the compatible filter" describe different operations.

Project worksheet. Starting product ... / use case ... / most common doubt ... / proposed offer ... / why it is relevant ... / who keeps it up to date If you cannot explain the benefit without mentioning a discount, rework the offer before you publish it.

2. Build relationships in the catalogue

Do not infer compatibility from similar names: two accessories can look identical and differ in size. Start with one product family, draw a small relationship map and have someone who knows the products and support cases review it.

Starting product or variant	Offer	Required condition	Owner
[Model/version]	[Accessory]	[Connection, size, availability]	[Name]
[Single pack]	[Multipack]	[Clear quantity and unit price]	[Name]
[Main product]	[Actual service]	[Coverage, duration, delivery]	[Name]

Decide what happens when a condition stops holding. An unavailable accessory can disappear, be replaced by a verified alternative, or stay visible without a buy option. Do not swap in a generic item just to fill the space.

Metafields can store relationships and instructions, but they do not create a visible block by themselves: the theme or an app has to read them. A seasonal rule also needs a display logic that is actually built. Search & Discovery recommendations need a compatible theme with the complementary products section added to the product page, and products that meet the requirements: for example active, published to the Online Store channel and, for complementary products, in stock.

With a small catalogue, a well-maintained manual selection is easier to control. A large range needs rules and a process for new products: who assigns relationships, who reviews them and how obsolete links are removed. Catalogue size is no excuse for approximate compatibility.

3. Choose the right moment for each offer

On the product page the customer is still evaluating. Model differences, box contents and required accessories belong here. Put the essential information next to the choice and keep technical detail available without getting in the way of the main button.

In the cart the main decision is already made. A simple complement is easy to grasp; a long comparison between variants can force the customer to start over. Show the extra price, the compatibility and a way to remove the item. After an addition, the summary should make clear what changed.

A collection page can help people find a family or a kit, but it does not necessarily know which variant the customer will buy. Avoid specific compatibility claims before that selection. If a required component is not included, say so on the main product page: finding out in the cart is an avoidable surprise.

I prefer to give each point one clear job: model comparison on the product page, one accessory in the cart, usage instructions after the order. This is a design choice, not a Shopify limit. Add a second suggestion when you have a concrete reason and can check its effect.

4. Write an offer that supports a decision

A good offer answers four questions: what do I get, why might I need it, how much more do I pay and what conditions apply? "Complete your purchase" answers none of them.

For a case, a useful description might read: "Case for model X, with space for the cable. Add it for €18. Device sold separately." The price is illustrative: in your store it must come from the current commercial setup. For a higher-end model, explain the practical difference without making the base model sound inadequate.

Use authentic reviews that relate to the product. Avoid counters, scarcity and savings you cannot prove. If you offer a service, a training session or extra cover, first check that it really exists and spell out delivery, duration, exclusions and how it relates to obligations that already apply. A commercial promise is not created by adding a line to the theme.

For a bundle, state components, quantities, variants and exclusions. A struck-through price or a saving against buying separately needs a real comparison that suits the market. Do not calculate the advantage on invented single prices or on products the customer cannot buy under the stated conditions.

5. Calculate contribution before choosing a threshold

Average order value is useful, but it does not measure the economic result on its own. A bigger order can need a larger discount, different packaging or a second shipment. To choose an offer, build a consistent management calculation with revenue net of tax and costs on the same basis.

Order contribution = product revenue after discounts + shipping charged – product cost – variable payment, handling, packaging and transport costs.

This is not net profit: it leaves out fixed costs and other items you need to assess separately. If an offer changes acquisition, returns or support costs, add those to the comparison. For returns, use estimates based on relevant data and update them when actual outcomes arrive.

A worked example

The example excludes tax and uses costs on a consistent basis. The customer pays €60 for the product and €5 for shipping. Product cost is €30, handling and packaging €3, transport €6, payment €1. Contribution is $65 - 30 - 3 - 6 - 1 = €25$.

You offer a €15 accessory that costs you €5 and make shipping free from €75. Handling and packaging rise to €3.50, payment to €1.50, and transport stays at €6. The new contribution is $75 - 35 - 3.50 - 6 - 1.50 = €29$. The gain is €4, while product value grows by €15.

If the accessory needs a second €6 shipment, contribution falls to €23: the offer sells more and earns less. This is why a threshold has to be judged together with stock, fulfilment locations and logistics costs.

In your spreadsheet, record the base scenario, the offer scenario and the difference. Also try an unfavourable but plausible combination: an allowed discount, a more expensive destination or a lower-margin item. A €49 or €59 threshold has no universal value.

6. Configure discounts, bundles and availability

How discounts combine depends on their classes and combination settings. First write down which benefits you want to allow together, then check the resulting total. Do not assume all codes stack, or that an automatic discount always excludes the others.

With the native Buy X Get Y promotion, the customer must add the required items to the cart, Y included: the free item is never added automatically when the threshold is reached. If you promise automatic addition, you need a solution that does it and proof of how it behaves.

For fixed kits and multipacks, consider Shopify Bundles; a freely configurable selection may need another solution. Check that the bundle type matches the range you plan to sell.

Then move from price to delivery. Check component stock, sellable quantities, fulfilment location and what happens when something sells out. Do not make an incomplete kit the standard fallback: any partial delivery must make sense for the product and match what you agreed with the customer. Document returns and replacements of components so staff do not have to improvise.

Back-office automations can assign tasks or send notifications, but they do not replace cart logic. If an app promises a real-time change, test it on the surface involved and re-read the resulting cart.

7. Separate checkout, post-purchase and communications

A post-purchase offer from an app in the dedicated surface appears after payment and before the order confirmation. Shopify lets you select only one app for that surface. It is not the same as a block on the thank-you page or a link in an email.

Before promising "one click, no re-entering details", check that the specific app, payment and order are eligible. A link sent after purchase may open a new payment flow; on its own it does not authorise a charge. Describe exactly what happens to the customer.

In service communications, put confirmation, status and instructions first. An extra offer must not hide necessary information. If you plan later promotional messages, follow the consent process and communication rules that apply to your audience.

For business customers, think about quantities, authorised catalogue, payment terms and the approvals actually configured. For consumers, the occasion of use and the ease of choosing count. Do not reduce the first group to rationality and the second to impulse: both need prices and conditions they can understand.

8. Implement and test the journey

Before implementation, write a short specification: surface, eligible products, conditions, copy, button action, economic calculation and behaviour when the offer is unavailable. Keep the original theme version and the settings involved so you can restore a known configuration.

Start with one representative product. Open the page on a phone, select a variant, accept the offer and check the summary. Remove the complement: quantities, discounts and threshold must update consistently. Change variant and repeat. An offer that fits model A must not stay selected, misleadingly, when you switch to model B.

Extend the test to sold-out stock, multiple quantities, compatible and incompatible codes, the languages and markets you serve, available delivery and supported payment. Check keyboard focus, closing of any pop-ups, readability of the total and buttons hidden on mobile. A screenshot of the editor proves the configuration, not that the journey works.

- ☐ After a variant change, the offer updates and the previous model's offer is not left selected.
- ☐ After removing the complement, quantities, discounts and threshold recalculate.
- ☐ Sold-out stock, multiple quantities and compatible and incompatible codes were tested.
- ☐ The intended language, market, delivery and payment were tested.
- ☐ Keyboard, closing of pop-ups and mobile buttons were checked.

If you need a test order, plan it so it does not interrupt real purchases. While payment test mode is on, customers cannot complete live orders; a test with a real transaction, then cancelled and refunded, can incur payment processor fees that are not returned.

9. Measure the journey, not just the customers who accept

Define the period, products and eligible sessions before you compare results. When you measure acceptance, the denominator must cover the people who saw the offer, not all store visitors. If your system does not record exposure, state that limit: orders containing the accessory are not necessarily offer acceptances.

In Shopify sales reports, AOV is gross sales minus discounts, divided by orders, excluding later order adjustments; tax and shipping are not part of the calculation. Align your calculation with that definition before comparing it with other tools.

Alongside AOV, track conversion of eligible sessions, contribution, fulfilment cost, returns and support requests. A rising AOV with falling conversion needs investigating: the offer may be involved, but so may traffic, stock or measurement. A before-and-after comparison does not separate these causes.

If traffic supports a controlled experiment, set the main metric, the limits you will not cross and the collection period before you start. With few orders, run a pilot with qualitative observation and state the uncertainty. Two calendar weeks are not enough evidence by definition.

10. Finish with a reasoned decision

The handover includes the product map, final copy, settings, evidence from the journey tests and the economic calculation. Add a short decision log: keep, change or switch off; evidence available; owner; next check.

The work is ready when someone other than the person who configured it can explain the offer, repeat the main cases and find the expected result. Before release, fix any error that changes price, compatibility or the ability to buy. Secondary improvements go on a list with priority and deadline.

Final worksheet. Chosen family ... / problem solved ... / estimated incremental contribution ... / most critical test ... / observed result ... / decision ... / owner ... / review date

Come back to this sheet when prices, components, rates or apps change. A funnel stays dependable only while someone keeps its promises.

Sources

- Shopify Help Center, Search & Discovery recommendations: <https://help.shopify.com/en/manual/online-store/storefront-search/search-and-discovery-recommendations>
- Shopify Help Center, discount combinations: <https://help.shopify.com/en/manual/discounts/discount-combinations>
- Shopify Help Center, Buy X Get Y discounts: <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 and post-purchase apps: <https://help.shopify.com/en/manual/checkout-settings/customize-checkout-configurations/checkout-apps>
- Shopify Help Center, test orders: <https://help.shopify.com/en/manual/checkout-settings/test-orders>
- Shopify Help Center, sales report: <https://help.shopify.com/en/manual/reports-and-analytics/shopify-reports/report-types/default-reports/sales-report>

Sources checked on 17 October 2026.