# Open-Xchange Upsell

# Product Guide

for OX App Suite v7.10 and above

February 2020

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# 1. Introduction

## 1.1.    Intention of this Document

The purpose of this document is to inform Open-Xchange customers and partners about the key features that are available with OX Upsell for OX App Suite 7.10 and above.

**Note**: OX Upsell is only available for OX App Suite as part of OX Monetization that helps you leverage your communications strategy and grow your business by maintaining meaningful conversations with your customers. Please contact Open-Xchange Sales for further information.

## 1.2.    OX Upsell in a Nutshell

OX Upsell helps generate vital added revenue while taking advantage of impulse purchase opportunities by removing barriers to purchase without users having to leave OX App Suite.

OX Upsell allows you to add predefined upsell trigger points to areas within OX App Suite that are clicked on frequently by users. When a user clicks the upsell trigger an overlay appears that offers the user the ability to upgrade to a premium package or purchase additional products.

Most OX App Suite providers bundle a basic package with their other services like web hosting, Internet, etc. In this case, OX App Suite Basic is provided to end users for no additional charge. At the same time, they offer a fee-based, premium package that's used to monetize the platform and utilize the user engagement potential of OX App Suite.

Here is an example of how packages could be structured:

- Free:              Mail, Portal, Address Book, Calendar & Tasks
- Premium:        Free plus: Drive (25GB), No advertisement,
                       Shared Calendar & Address Book
- Professional:    Premium plus: Drive (50GB), Documents & Guard
- Upsell:            Additional storage as a la carte
- Cross-sell:      Your other products and services

In summary, OX Upsell can be fully customized, can integrate and work with existing provisioning infrastructure to meet individual needs.

# 2. Trigger Overview

OX Upsell provides a variety of pre-defined trigger areas that are available in all OX modules/apps (Mail, Address Book, Calendar, Tasks, Portal, Documents and Drive). All triggers have related configurable properties which are depending on the chosen trigger.

See below configurable properties which are generally available:

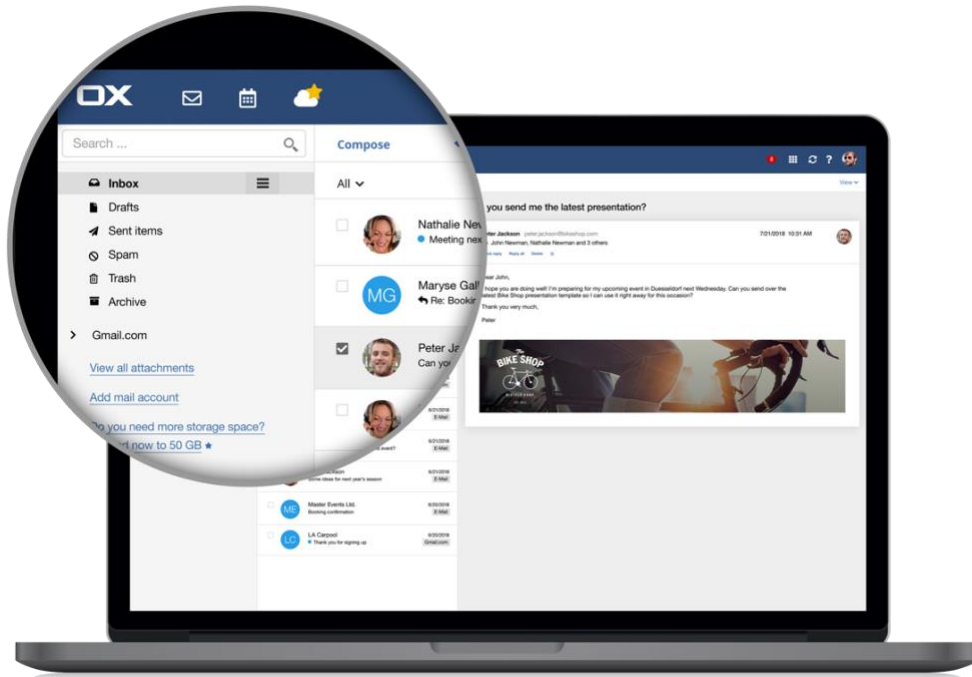| Configurable Properties | Description |
| --- | --- |
| enabled | Option to show/hide the respective trigger. |
| icon | The default is fa-star, but the Customer can choose every icon within font-awesome to be displayed. <br> Note: Font-awesome can vary by OX App Suite version. |
| color | Customers can choose any valid CSS color value for the title and/or the icon. |
| title | Means Customers can include any text as a trigger. <br> Note: the text space is limited depending on the trigger. |

## 2.1.  Topbar

Inside the topbar of OX App Suite, also called menu/navigation are four configurable triggers available which are always shown no matter which module the user is using.

- Quick Launcher
- App Launcher
- Secondary Launcher
- Dropdown

These triggers are always shown on the desktop which makes them the most seen available touchpoints for upselling.

### 2.1.1. Quick Launcher

This trigger is located next to the app favorites on the left side, here, marked with a star. In general, the user is able to choose which modules are shown here (limited to three module icons in v7.10.2 and five module icons in v7.10.3) but the upsell trigger makes it possible to set one or more apps as default right next to the favorites.



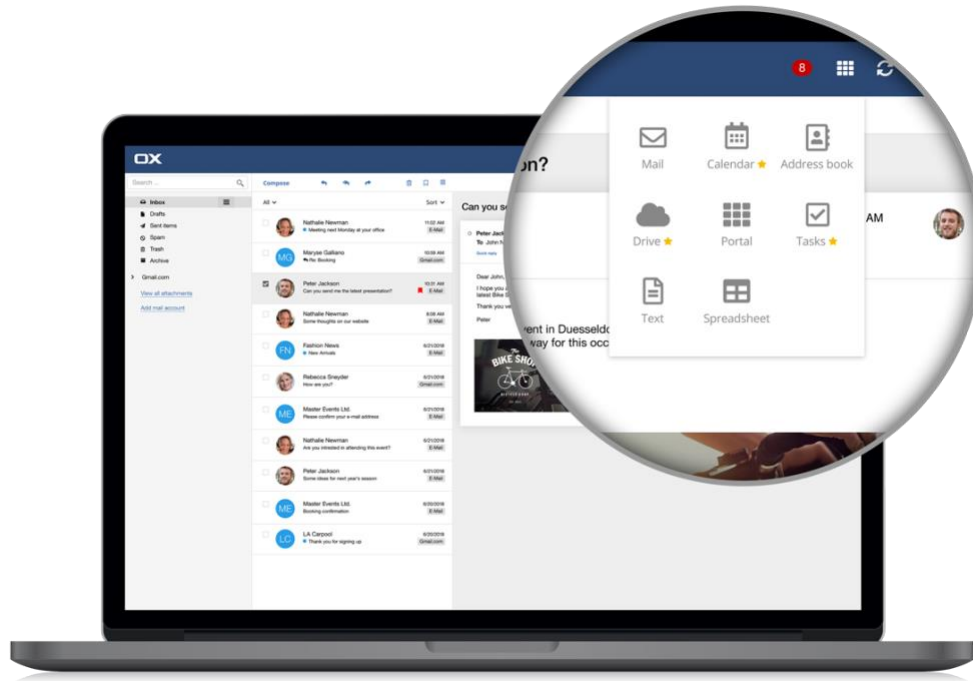| Configurable properties | Description |
|---|---|
| Shows either<br><br>a) standard OX App Suite modules<br><br>b) custom apps | The trigger can show locked OX App Suite modules plus the configured icon which can promote premium OX App Suite features. It can also display custom apps created by the customer which link either to an overlay or to an external page.<br><br>For more details see section 'Custom App'. |

Due to space limitations, this trigger is not shown on mobile devices.

Recommended usage

- Show Portal app icon as a default module in order to increase traffic for cross- and upsell widget implementations that are located in the Portal.
- Show locked module as default e.g. Drive to upsell additional storage.

### 2.1.2. App Launcher

This trigger is located inside the dropdown of the regular app launcher as a locked standard OX App Suite module icon or a custom app, here, marked with a star.



| Configurable properties | Description |
|---|---|
| Shows either<br><br>a) standard OX App Suite modules<br><br>b) custom apps | The trigger can show locked OX App Suite modules plus the configured icon which can promote premium OX App Suite features. It can also display custom apps created by the customer which link either to an overlay or to an external page.<br><br>For more details see section 'Custom App'. |

Recommended usage

- Show all locked modules that are available inside OX App Suite.
- Use custom apps to generate traffic towards your own landing pages and products/services.

### 2.1.3. Secondary Launcher

This trigger is located next to the notification area or the app launcher when there are no notifications. In the web UI, this trigger is the most present one for the user and offers the quickest way to open an overlay.



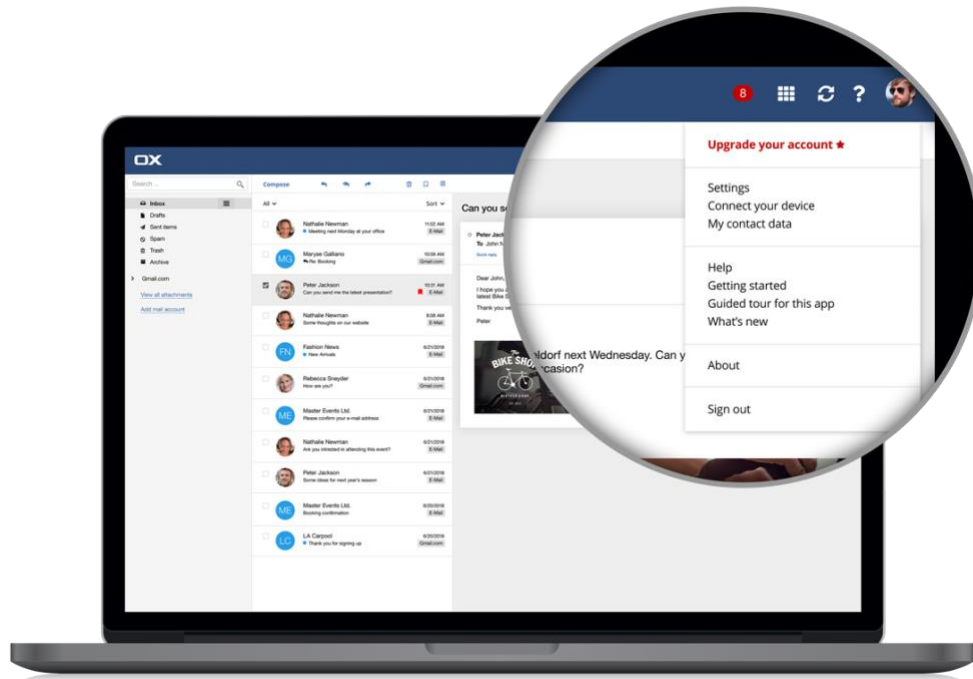| Configurable properties | Description |
|---|---|
| enabled, icon, color, title | The trigger can only be used to upsell locked OX App Suite modules. |

Due to space limitations, this trigger is not shown on mobile devices.

Recommended usage

- Show icon for upselling and link to an overlay.
- Most common icons are stars, diamonds and a crown.

### 2.1.4. Dropdown

This trigger is located inside the main toolbar's dropdown as the first entry, here, text marked in red with a star at the end. The user can click here to go to settings, help, sign out, etc.



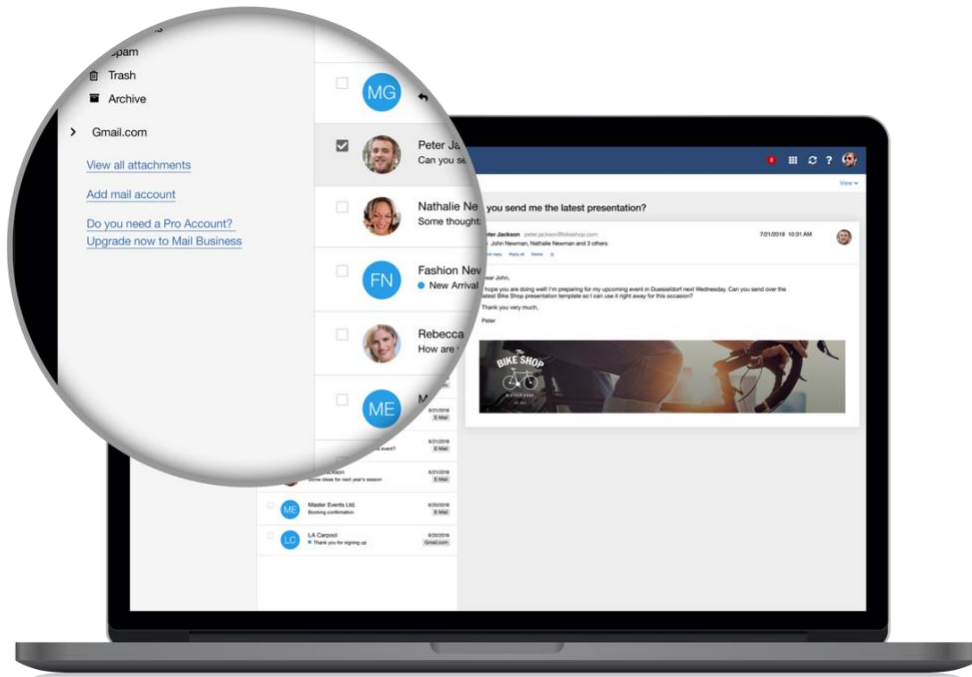| Configurable properties | Description |
| --- | --- |
| enabled, icon, color, title | This menu entry can be used for cross-and upsell and link either to an overlay or to an external page. The trigger shouldn't be much longer than 30 characters. |

Recommended usage

- Based on available packages integration of call-to-action slogan.
  - For instance, 'Upgrade your account'.

## 2.2. Folder View

The folder view is the area on the far left and shows a folder tree that can be managed by the user depending on the respective module's content type and overall functionality.

### 2.2.1. Below Folder View Trigger

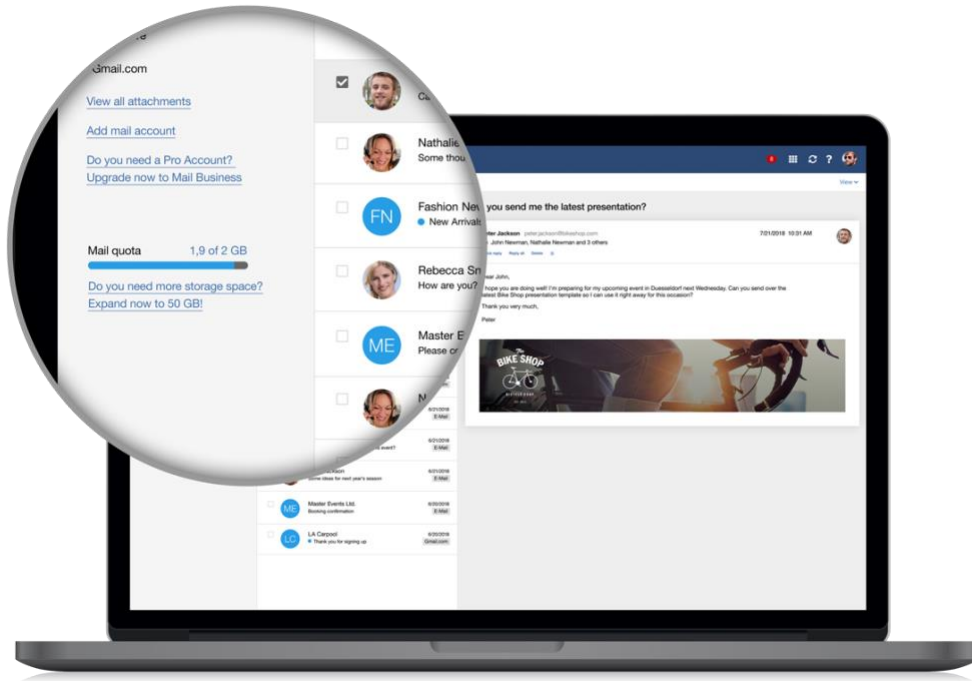This trigger is located inside the folder tree on the left side inside OX App Suite.



| Configurable properties | Description |
|---|---|
| enabled, icon, color, title | Located below the folder view of OX App Suite modules Mail, Address Book, Calendar and Drive. |

Recommended usage

- Use to upsell premium packages 'Do you need more storage?'.
- Show seasonal messages to promote your own products and services.

### 2.2.2. Mail Folder View Quota

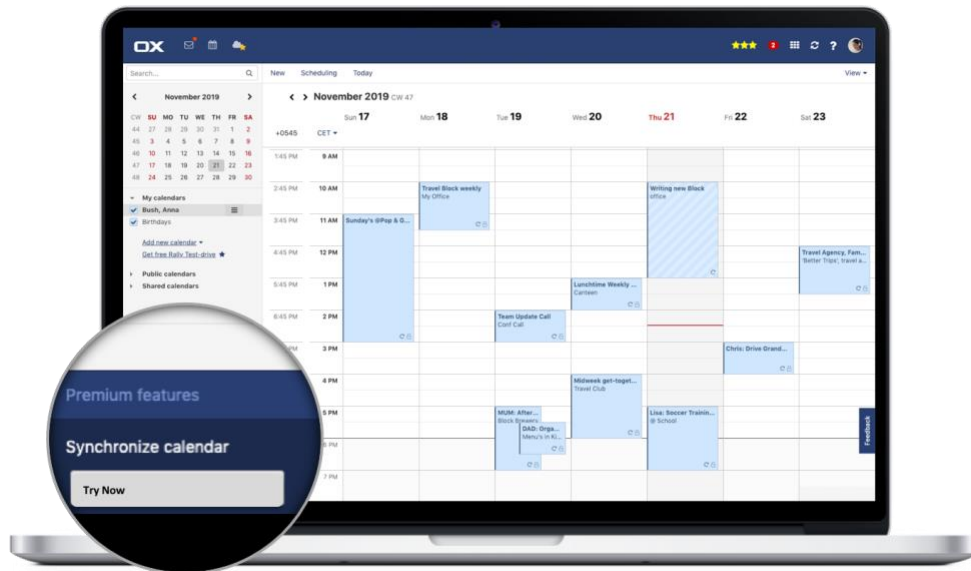This trigger is located inside the folder tree on the left side inside the OX App Suite Mail module.



| Configurable properties | Description |
| --- | --- |
| enabled, icon, color, upsellLimit | Located below the folder view without an icon by default. The customer can set the upsell limit in Bytes. If the maximum mail quota is larger than the upsell limit, the trigger will not be shown. |

Recommended usage

- Use to upsell 'Premium account'.
- Show the option for additional storage.

### 2.2.3. Premium Area

These triggers are placed inside the premium area, which is a section at the bottom of the folder view that needs to be activated separately. Therefore, these triggers are only shown if the premium area is enabled.
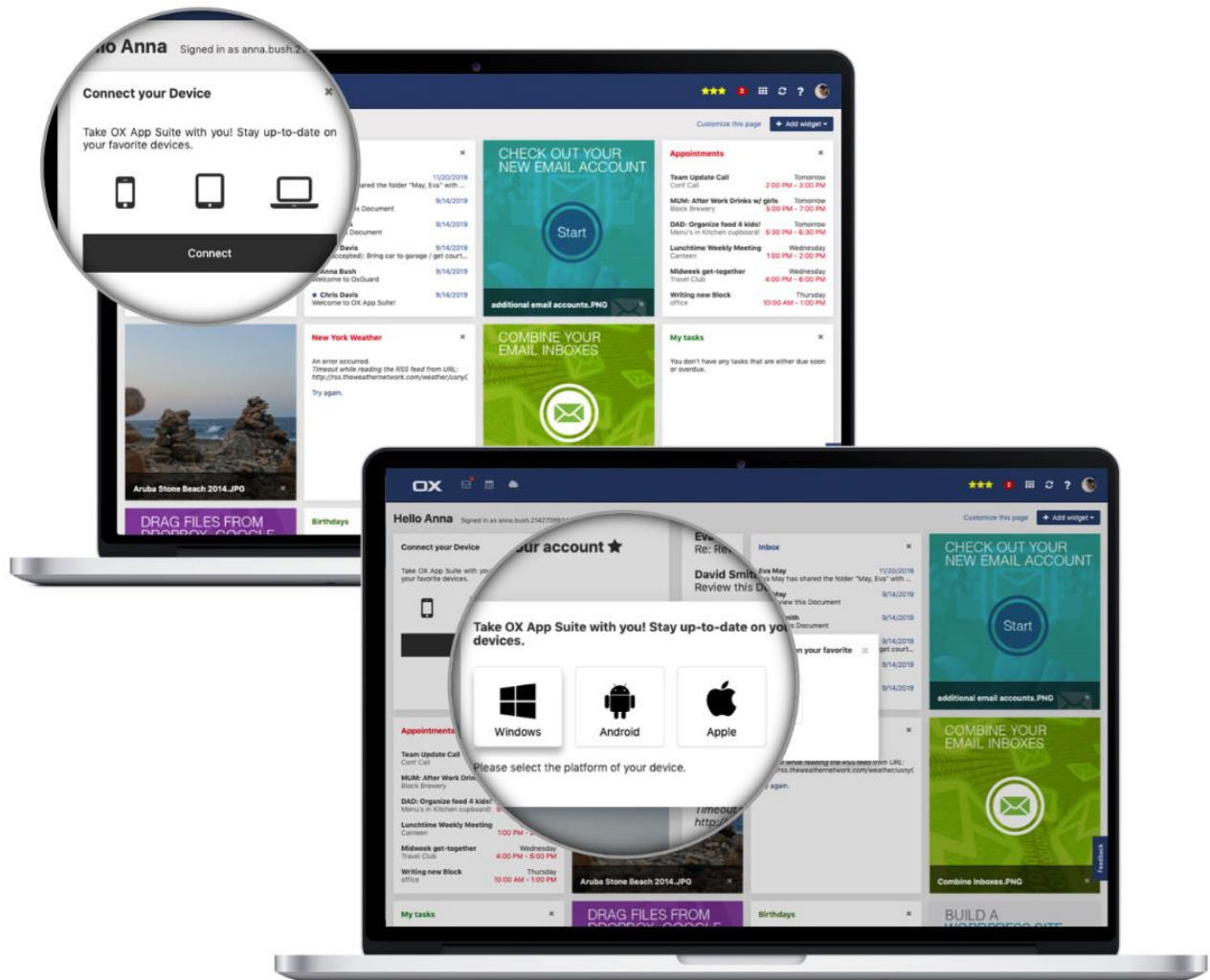


| ID | Configurable properties | Description |
|---|---|---|
| folderview/mail/bottom | enabled, color, title | Default text 'Try now' and has no icon by default |
| folderview/contacts/bottom | enabled, color, title | Default text 'Try now' and has no icon by default |
| folderview/calendar/bottom | enabled, color, title | Default text 'Try now' and has no icon by default |
| folderview/Infostore/bottom | enabled, color, title | Default text 'Try now' and has no icon by default |

Recommended usage

- It can be used for a single feature or package upgrade.
- Show the option to 'Synchronize calendar'.

## 2.3. Misc

The trigger "Connect your Device" supports the upsell of additional OX App Suite features & functionalities and is linked to a layer that shows all options for synchronization.



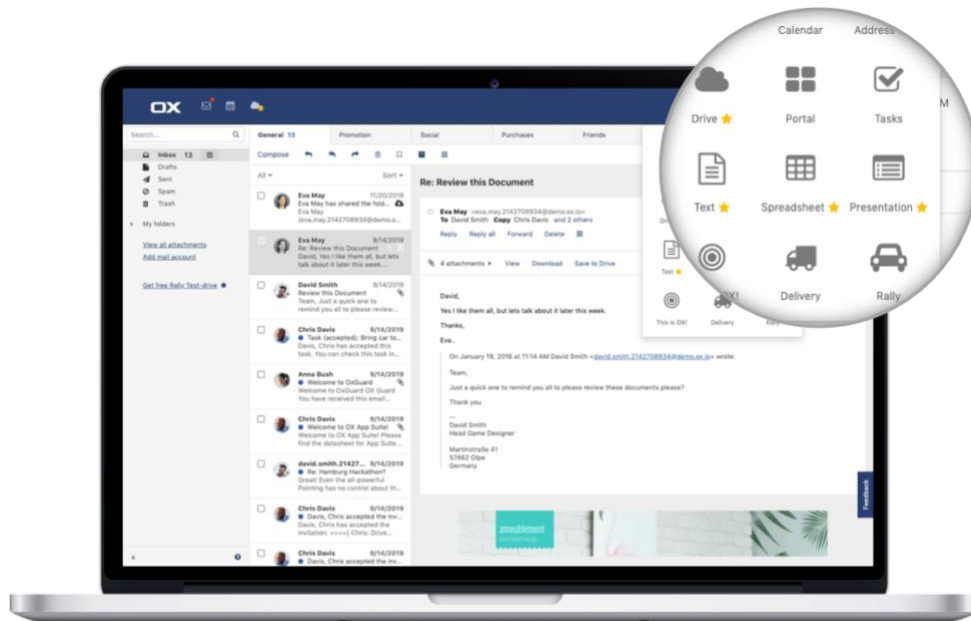| Trigger | Configurable Properties | Description |
|---------|------------------------|-------------|
| client.onboarding | enabled, color, title | This trigger is part of the "Connect your Device" function and can appear as a portal widget but also inside the dropdown. |

Recommended usage

- Show 'Connect your Device' as a default widget inside the OX App Suite Portal in order to support user loyalty.

# 3. Tools

The following features inside OX App Suite can be used to integrate additional cross- and upsell options.

## 3.1. Custom App

You are able to add a new module to the app launcher, here, see the example 'Delivery'.



| Configurable properties | Description |
|---|---|
| icon, title | The trigger can show a custom app created by the customer which links either to an overlay or to an external page. |

Recommended usage

- Use a custom app to link to an external landing page to promote your own products and services or link to third-party offers/cooperation's.

## 3.2. Widget

The widget is displayed inside the Portal and can show images, text or combinations thereof. A widget is completely customized to your desired look & feel and can contain several "slides". There can be more than one widget for cross-& upsell.
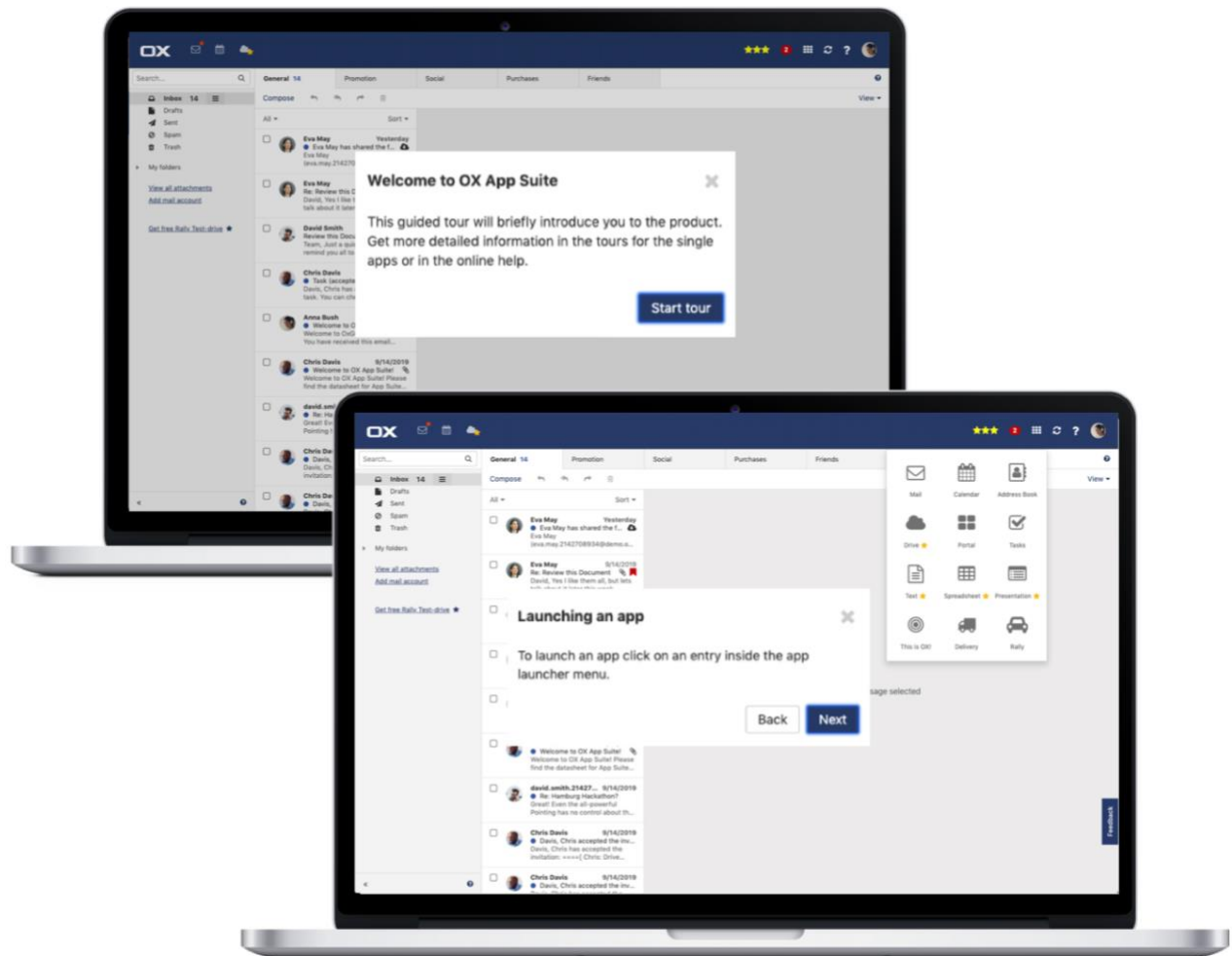


| Trigger | Configurable Properties | Description |
|---|---|---|
| portal-widget | enabled, icon, imageURL, removable | A draggable portal widget. The customer can add a background image with 'imageURL'. If no image is used, the widget displays the text-centered with a customizable space-separated list of font-awesome icons. |

Recommended usage

- Use portal widget for internal and external communication.
- Use to upsell a single feature or a package upgrade.

### 3.3. Guided Tour

In order to cross-/upsell right from the beginning of a user's journey through OX App Suite, the guided tour can be used to walk the user through the OX App Suite UI as well as show/point out cross-and upsell opportunities.
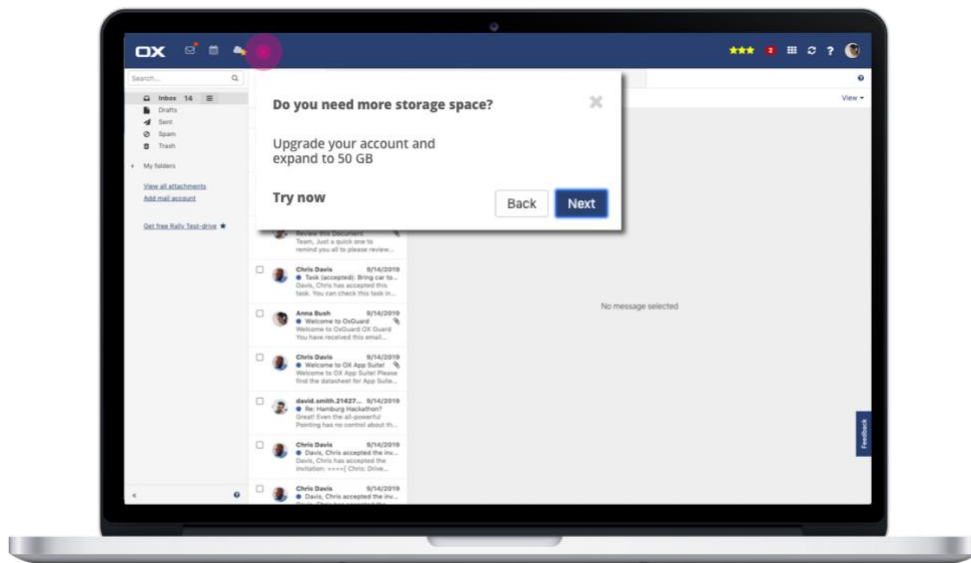


Recommended usage

- Show the new user how OX App Suite works and where to find the upsell triggers.

## 3.4. Bubbles

Bubbles are little popups that form a series of small information balloons that point to UI elements and display text as well as small navigation elements. They show up after a given amount of time and point to the defined UI element and display the specified text.

You can have several bubbles, but each bubble needs to point to one application. Moreover, each bubble can optionally be set up to be valid only during a certain time span (or from a date, or to a date).
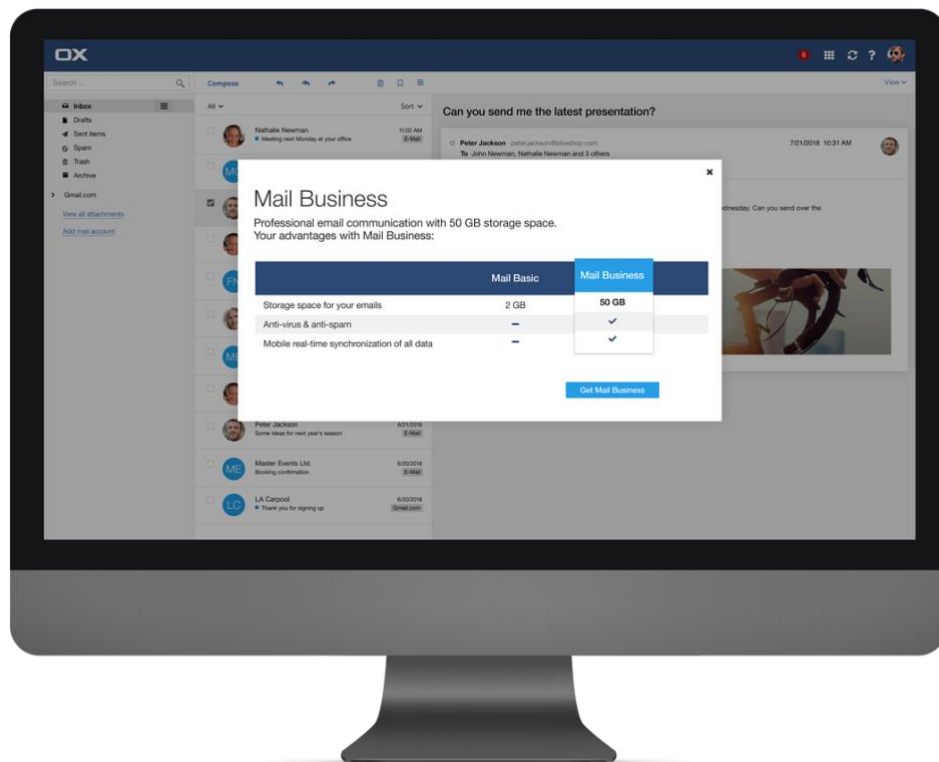


Recommended usage

- Show the user where to find triggers via a mouseover and explain what the user can do.

# 4. Wizard

The wizard is an overlay that can be triggered by the user's click on a trigger inside OX App Suite as well as when the user starts using OX App Suite. This layer can display custom information without having to leave OX App Suite environment. The customer is able to use the overlay for the use of cross- and upsell purposes.

For upsell, the customers must integrate their payment service provider workflow to initiate the purchase process. Therefore, OX App Suite comes with an integrated optional plugin that takes care of this.

The upsell wizard is a small shopping cart application that displays packages/services. It offers the usual three-step process of putting items in your cart, reviewing and ordering them.



Recommended usage

- Multiple wizards possible e.g. in-app upsell, internal & external communication.
- Show upsell option 'Upgrade your account' via package introduction.