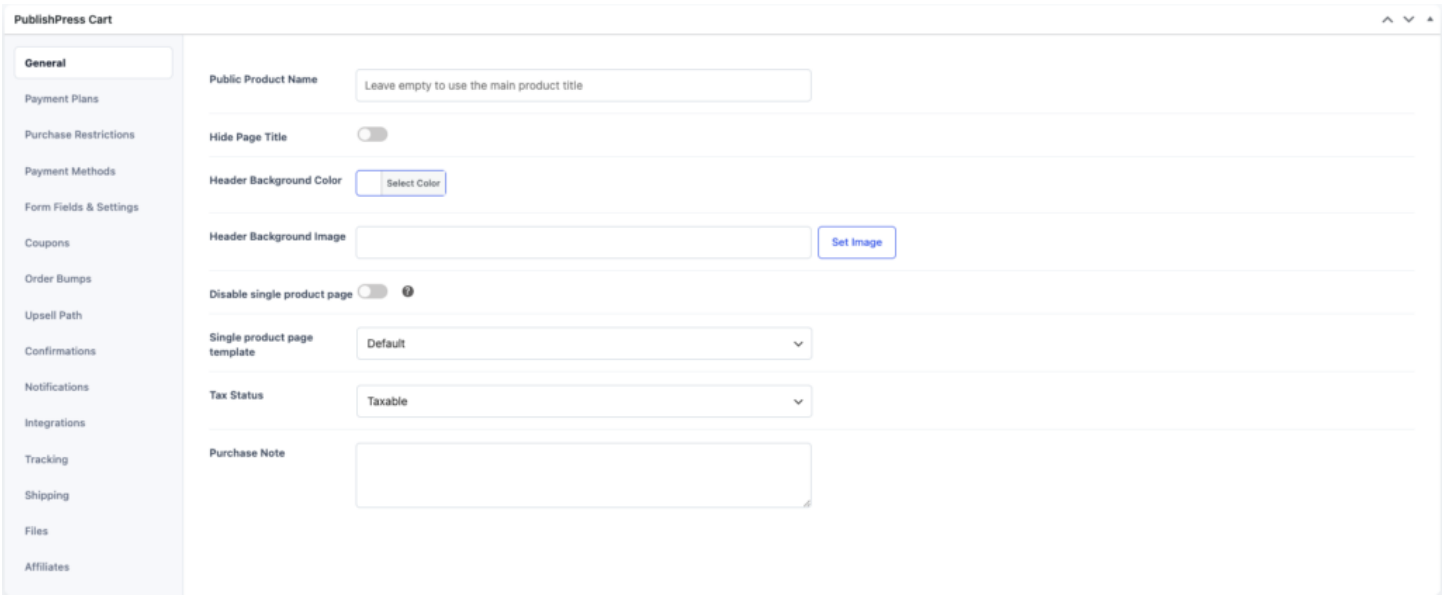
Product Configuration

Products · https://publishpress.com/knowledge-base/product-configuration/

When you create a new product, you will have a lot of options on the PublishPress Cart metabox. In this documentation, we will explain every single item of the configuration.



General

The **General** tab controls the product page and basic product behavior.

- **Public Product Name**: Enter a different product name for customers. Leave this empty to use the main product title.
- **Hide Page Title**: Hide the product page title on the front end.
- **Header Background Color**: Choose the background color used in the product header.
- **Header Background Image**: Add an image to the product header.
- **Disable single product page**: Hide the built-in product checkout page. When it's enabled, it will show "**Redirect this page to**" which will allow you to choose a page to redirect visitors to when the single product page is disabled.

- **Single product page template**: Choose the template for the single product page. You can use the default template or your theme template.
- **Tax Status**: Choose whether the product is taxable or non-taxable.
- **Purchase Note**: Add a note that customers can see after purchase.

Payment Plans

The **Payment Plans** tab controls how customers pay for the product.

- **On Sale?**: Temporarily sell the product at a discounted price.
- **Schedule Sale?**: Schedule sale pricing for a specific date range.
- **Sale Start**: Choose when the sale starts.
- **Sale End**: Choose when the sale ends.
- **Show original price**: Show the original price next to the sale price.
- **Hide Plans Section**: Hide the payment plan selection area on the checkout form.
- **Section Heading**: Change the heading above the payment plans. The default is **Payment Plan**.
- **Payment Plan**: Add one or more payment options for the product.

When you add a payment plan, you can configure these settings:

- **Plan ID**: A unique ID for this payment plan.
- **Price Type**: Choose the type of payment. Options include one-time payment, recurring payments, pay what you want, or free.
- **URL Slug**: Add a unique slug for this plan. Use letters, numbers, dashes, and underscores only.
- **Option Label**: Add the label customers see on the checkout form.
- **Sale Option Label**: Add a different label when the product is on sale.
- **Price**: Enter the regular price.
- **Sale Price**: Enter the sale price.
- **Frequency**: Choose how often recurring payments are charged.
- **Pay Interval**: Choose the billing interval, such as day, week, month, or year.

- **Number of Payments**: Choose how many payments are required. You can also choose **Never expires**.
- **Name Your Price Label**: Change the label for pay-what-you-want pricing.
- **Enable Pay What You Want**: Let customers enter their own price for recurring payments.
- **Sign-up Fee**: Add an upfront fee for recurring payments.
- **Sale Sign-up Fee**: Add a discounted upfront fee during a sale.
- **Trial length (in days)**: Add a free trial period for recurring payments.
- **Process cancellations**: Choose whether subscription cancellations happen immediately or at the end of the current billing period.
- **Hidden**: Hide this payment plan from checkout forms. At least one payment plan must remain visible.

Purchase Restrictions

The **Purchase Restrictions** tab controls when and how customers can buy the product.

- **Limit product sales**: Limit the total number of sales for this product.
- **Amount Remaining**: Enter the number of products available. When this reaches zero, the cart closes.
- **Limit sales per customer**: Limit how many times one customer can buy the product.
- **Customer purchase limit**: Enter the maximum number of purchases allowed per customer.
- **Limit reached message**: Add the message customers see after reaching the purchase limit.
- **Cart Opens**: Choose the date when the cart opens.
- **Cart Closes**: Choose the date when the cart closes.
- **Cart Closed Action**: Choose what happens after the cart closes. You can display a message or redirect customers.
- **Cart Closed Redirect URL**: Enter the redirect URL.
- **Cart Closed Message**: Add the message customers see when the cart is closed.

Payment Methods

The **Payment Methods** tab controls which enabled gateways customers can use for this product.

At the top of this tab, you can see the payment methods enabled globally in **Cart > Settings**.

Use the checkboxes to control which payment methods are available for this product. Available options can include:

- **Cash on Delivery**
- **Credit card (Stripe)**
- **PayPal**
- **Razorpay**
- **Revolut**
- **Square Pay**
- **Mollie payment methods**

Only gateways that are enabled and configured on your site will appear here.

Form Fields & Settings

The **Form Fields & Settings** tab controls the checkout form design and fields.

- **Hide field labels**: Hide labels above checkout fields.
- **Display address fields**: Show address fields on the checkout form.
- **Form Skin**: Choose the checkout form layout. Options include default, 2-step, opt-in, and split-in.

2-Step Form Options

These settings appear when you choose the **2-Step** form skin:

- **Tab 1 Heading**: Change the first tab heading.
- **Tab 2 Heading**: Change the second tab heading.
- **Tab 1 Subheading**: Change the first tab subheading.
- **Tab 2 Subheading**: Change the second tab subheading.

- **Step 1 Button Label**: Change the button text for step one.
- **Step 1 Button Sub-text**: Add smaller text below the step one button.
- **Step 1 Button Icon**: Add an icon to the step one button.
- **Icon Position**: Place the icon on the left or right.
- **Step 1 Footer Text**: Add text below the first step.

Form design

- **Primary Color**: Choose the main color for the checkout form.
- **Submit Button Text**: Change the checkout button text.
- **Submit Button Sub-text**: Add smaller text below the submit button.
- **Submit Button Icon**: Add an icon to the submit button.
- **Icon Position**: Place the icon on the left or right.
- **Form Footer Text**: Add text below the checkout form.

Terms and privacy

- **Show Terms checkbox**: Use the default setting, enable the checkbox, or disable it.
- **Terms URL**: Add a custom terms URL for this product.
- **Show Privacy checkbox**: Use the default setting, enable the checkbox, or disable it.
- **Privacy URL**: Add a custom privacy URL for this product.

Default Fields

Default fields include:

- First Name
- Last Name
- Email
- Phone Number
- Company Name

For each default field, you can change the label, make the field required, change the size, or disable it.

Custom Fields

Use **Custom Fields** to collect extra information during checkout.

For each custom field, you can configure:

- **Field ID**: Enter a unique ID for the field.
- **Label**: Add the field label.
- **Field Type**: Choose the field type. Options include text, date, date time, dropdown, password, add-on, radio, checkbox, and hidden.
- **Default Value**: Add a default value.
- **Required Field**: Make the field required.
- **Description**: Add help text for the field.
- **Include in Invoice**: Show the field value in invoices.
- **Price per Item**: Add a price for add-on fields.
- **Username field for new accounts**: Use this field as the username when creating user accounts.
- **Auto login user after purchase**: Automatically log in the user after purchase. This requires a password field and a user account integration.
- **Selections**: Add the choices for dropdown, checkbox, or radio fields.

Address Fields

These settings appear when **Display address fields** is enabled.

Default address fields include:

- Country
- Address
- Address Line 2
- Town / City
- State / County

- Postcode / Zip

You can change the heading, labels, required status, and field size.

Coupons

The **Coupons** tab lets you create coupons for this product.

- **Show Coupon Field**: Show the coupon field on the checkout form.
- **Coupon**: Add one or more coupon codes.

For each coupon, you can configure:

- **Coupon Code**: Enter the coupon code customers will use.
- **Coupon URL**: Create a URL that automatically applies the coupon.
- **Discount Type**: Choose the type of discount. You can discount the plan price or cart total by a fixed amount or percentage.
- **Amount Off**: Enter the discount amount.
- **Amount Off for Recurring Payments**: Enter a separate discount for recurring payments. Leave it empty to use the main amount.
- **Allowed Plans**: Restrict the coupon to specific payment plans.
- **Coupon Duration**: Enter how many months the discount applies to recurring payments.
- **Discount Applied Text**: Customize the success message shown after the coupon is applied.
- **Redemption Limit**: Limit how many times the coupon can be used.
- **Coupon Code Expires**: Set an expiration date and time.
- **Valid for**: Limit how long the coupon is valid after another product is purchased.
- **after purchasing**: Choose the product that starts the valid period.
- **One redemption per customer**: Limit each customer to one use.
- **Coupon CSV File**: Upload a CSV file to import coupon codes in bulk.

Order Bumps

The **Order Bumps** tab lets you add extra offers to the checkout form.

- **Enable Order Bump**: Turn on the main order bump.
- **Background Color**: Choose the background color for the bump box.
- **Select Product**: Choose the product used for the bump offer.
- **Use existing payment plan**: Use an existing payment plan from the selected product.
- **Payment Plan ID**: Choose the payment plan for the bump.
- **Price**: Enter a custom price if you are not using an existing payment plan.
- **Product Image**: Add an image for the bump offer.
- **Image Position**: Show the image on the left or top.
- **Checkbox Label**: Change the checkbox text.
- **Headline**: Add the bump headline.
- **Product Description**: Add the bump description.
- **Custom plan description**: Add a custom plan description in the order summary.
- **Replace main product**: Replace the main product with the bump product when selected.
- **Replace shipping**: Replace the main product shipping with the order bump shipping.

Additional Bumps

Use **Additional Bumps** to add more than one order bump.

Each additional bump includes similar settings, including product, price type, payment plan, price, image, checkbox label, headline, and description.

Upsell Path

The **Upsell Path** tab connects this product to a post-purchase upsell flow.

- **Select Path**: Choose the upsell path that should start after this product is purchased.

If you have not created any upsell paths yet, the tab will show a link to create one.

Confirmations

The **Confirmations** tab controls what customers see after checkout.

Default Confirmation

- **Confirmation Type**: Choose what happens after purchase. Options include display message, display page, or perform redirect.
- **Message**: Enter the message shown after purchase.
- **Select Page**: Choose a WordPress page to show after purchase.
- **Thank You Page URL**: Enter the URL customers are redirected to.

Conditional Confirmations

Conditional confirmations let you show different thank-you pages or URLs based on order details.

For each conditional confirmation, you can configure:

- **Name**: Add an internal name.
- **Order flows that match**: Choose whether all rules or any rules must match.
- **Conditions**: Match by ordered product, not ordered product, field value, payment plan, order bump, upsell, or downsell.
- **Confirmation Type**: Choose display page, perform redirect, or append to URL.
- **Select Thank You Page**: Choose the page to show.
- **Thank You URL**: Enter the redirect URL.
- **URL String**: Add key-value pairs to append to the default confirmation URL.

Notifications

The **Notifications** tab controls product-specific emails.

- **Disable Order Received Confirmation email**: Stop sending the order received email for this product.

- **Disable New User Welcome email**: Stop sending the new user welcome email for this product.
- **Disable Purchase Confirmation email**: Stop sending the purchase confirmation email for this product.

Additional Purchase Notifications

Use additional notifications when you want to send custom emails after purchase.

For each notification, you can configure:

- **Notification Label**: Add an internal label.
- **Send To**: Choose enter email, purchaser email, or admin email.
- **Send To Email**: Enter the recipient email address.
- **Advanced sender settings**: Override the global sender details for this notification.
- **From Name**: Change the sender name.
- **From Email**: Change the sender email.
- **Reply To**: Add a reply-to address.
- **Bcc**: Add a Bcc address.
- **Subject**: Enter the email subject.
- **Message**: Enter the email content. You can use the available personalization tags.
- **Email preview**: Preview the email content.

Integrations

The **Integrations** tab runs actions after a product event.

Click **Renew mailing lists** if you need to refresh the available lists from your connected email services.

For each integration, you can configure:

- **Service**: Choose the integration service.
- **Trigger**: Choose when the integration runs.

- **Restrict by payment plan / purchase type**: Run the integration only for selected payment plans or purchase types.
- **Require consent**: Run the integration only if the customer selected the opt-in checkbox.

Available services depend on your site settings and installed plugins. They can include:

- Create User
- Update User
- ActiveCampaign
- Mailchimp
- MailPoet
- SendFox
- MemberVault
- WishList Member
- Tutor LMS
- Restrict Content Pro
- Webhook

Available triggers include:

- Product Purchased
- Product Refunded
- COD Order Created
- Subscription Active
- Installment Plan Completed
- Subscription Canceled
- Subscription Paused
- Subscription Renewal Charged
- Subscription Renewal Failed
- Lead Captured for 2-step forms

Webhook settings

If you choose **Webhook**, you can configure:

- **Method**: Choose GET or POST.
- **Webhook URL**: Enter the webhook URL.
- **Include headers**: Add custom headers.
- **Headers**: Add one header per line.
- **Field Map**: Map PublishPress Cart fields to webhook fields.

Other services may show their own fields, such as lists, tags, groups, courses, roles, or membership levels.

Tracking

The **Tracking** tab lets you add tracking scripts for this product.

- **Lead Captured**: Add JavaScript that fires when a lead is captured. This is for 2-step checkout forms.
- **Main Product Purchased**: Add tracking code that fires when this product is purchased as the main offer.

Use this area for tracking pixels, conversion scripts, or other product-specific scripts.

Shipping

The **Shipping** tab adds shipping costs to the product.

- **Enable shipping**: Turn on shipping for this product.
- **Single item**: Enter the shipping cost for the first item.
- **Single Item (Intl.)**: Enter the international shipping cost for the first item. Leave it empty to use the single item rate.
- **Each additional item**: Enter the extra shipping cost for each additional quantity.

- **Each additional item (Intl.)**: Enter the international extra shipping cost for each additional quantity.
- **Taxable**: Apply tax to shipping when the product is taxable.

International shipping is used when the customer's country is different from the store country.

Files

The **Files** tab lets you attach downloadable files to the product.

For each file, you can configure:

- **File ID**: The unique internal ID for the file.
- **File URL**: Upload or select the file.
- **File Name**: Enter the name customers will see.
- **Restrict by payment plan / purchase type**: Give access only for specific payment plans or purchase types.
- **Download limit**: Limit how many times the file can be downloaded.
- **Expire download after**: Enter a time limit, such as `3 days`. Leave it empty to never expire.
- **Redirect to file**: Redirect customers to the file instead of forcing the download.
- **Hidden**: Hide the download from customer accounts and order emails.

Affiliates

The **Affiliates** tab appears when the affiliate extension is active.

- **Enable affiliate sales**: Allow affiliate tracking and commissions for this product.
- **Description**: Add a description for affiliates.

Commission

Use commission settings to control how affiliates are rewarded for this product.

For each commission, you can configure:

- **Name (internal)**: Add an internal commission name.
- **Price**: Restrict the commission to specific payment plans.
- **Type**: Choose amount or percentage.
- **Amount**: Enter a fixed commission amount.
- **Percentage**: Enter the commission percentage.
- **Apply to**: Choose whether the percentage applies to the entire funnel, entire order, or this product only.
- **Renewal limit (in days)**: Limit subscription renewal commissions. Leave this empty to award all subscription renewals.