

Upsell Inventory Item Function

This feature is currently available on the **Palladium Enterprise 2012** version only.

Feature Overview:

This feature allows you to set an unlimited number of “Upsell” Items for Optional Dynamic Prompting per processing document. Additionally this feature can be used to group a number of items together say in the form of Kits or Standard Orders by attaching an unlimited number of Inventory Items to a service Item as an example.

How Does This Feature Help Your Business?

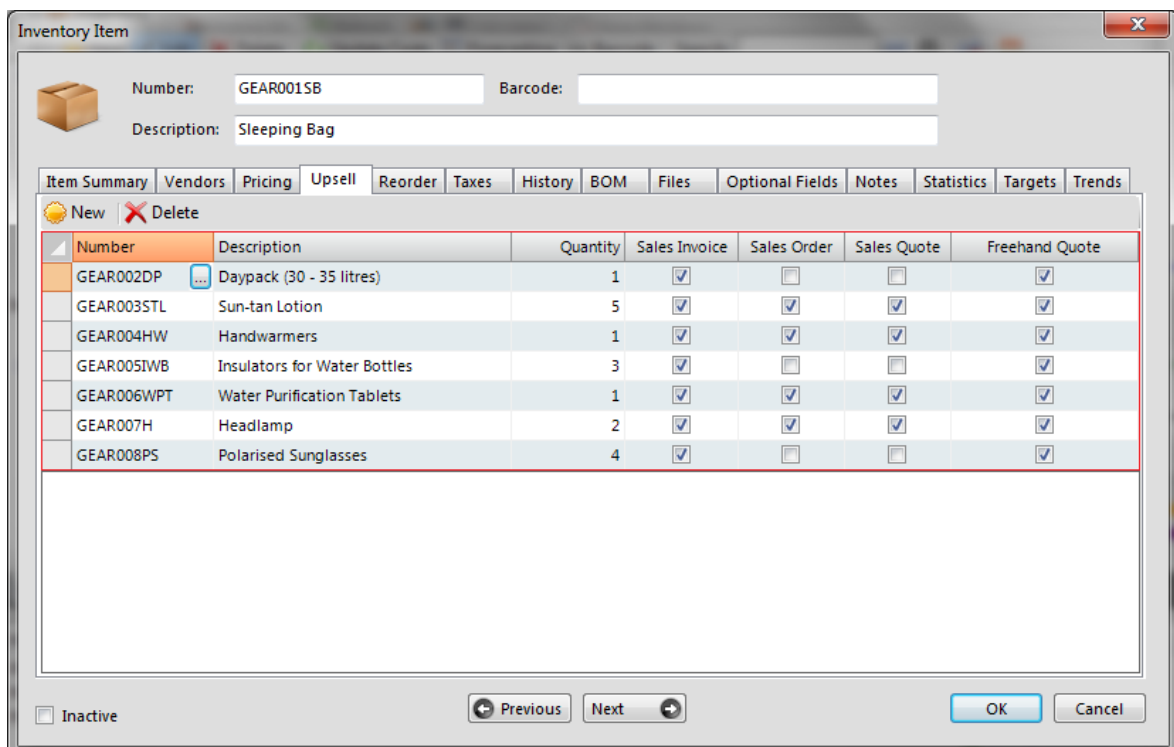
- Provides you with extensive sales-related information, which optimises the sales process.
- Increases staff productivity as it limits training requirements.
- Reduces processing errors and makes it simple for new employees to sell specialised products.

Feature Options:

To illustrate this functionality, I will use an Outdoor Retail Store as an example. To get started I go to the Inventory Module | Inventory & Services & Select the related Inventory item. Here we will create a Sleeping Bag which will serve as the master item. On this master item, I select the Upsell tab then click on the New option, that will allow me to browse for items to add on as “Upsell items”. When adding the Upsell items, I can also:

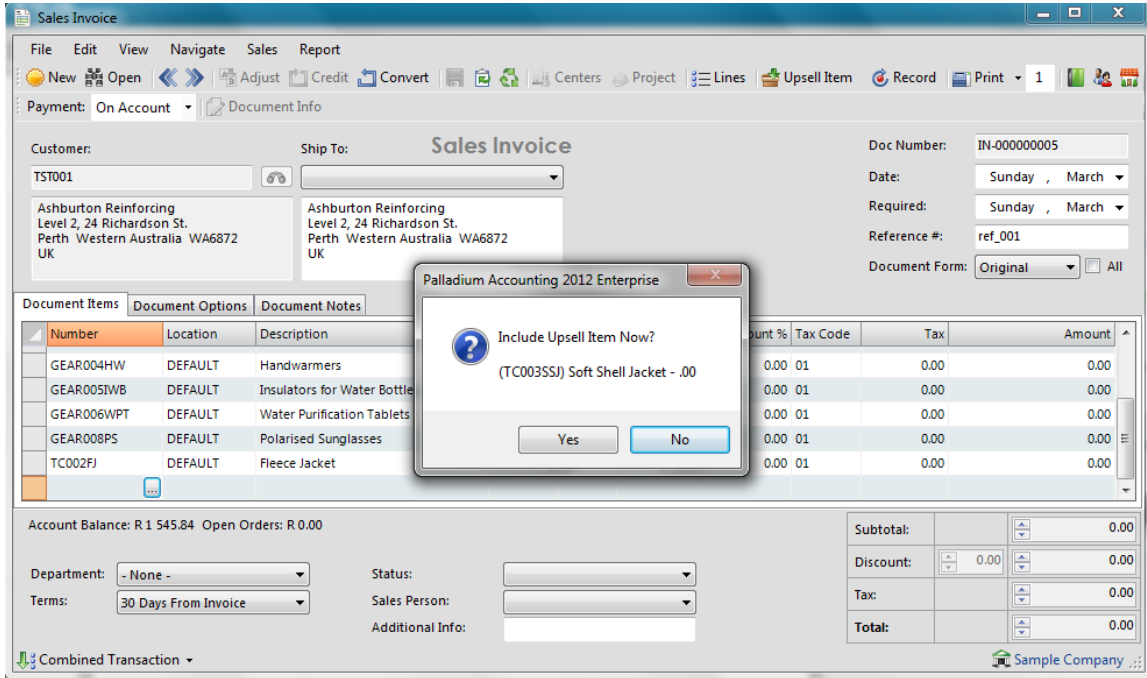
- Capture the relevant recommended required quantity
- Select the sales document in which you would like these Items to automatically invoke a **Screen PopUp**.

The screen below shows my Master Item (sleeping bag) and relevant Upsell items (daypack, sun-tan lotion, hand warmers, insulators for water bottles, water purification tablets, headlamps and polarised sunglasses).

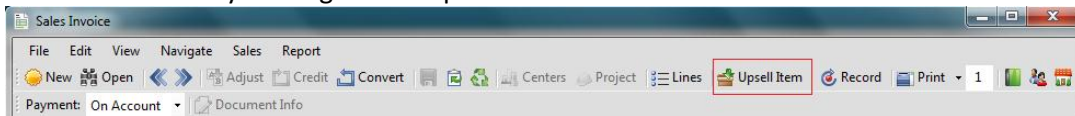


For example, when a sales document is processed for a customer going on camping trip, the Upsell Items screen will appear when the master item [i.e. a sleeping bag] has been chosen. The sales person processing the document is then prompted to suggest or recommend accessories (Upsell items i.e. headlamps, a daypack, water bottles etc.) that may complement their initial purchase choice (item master i.e. sleeping bag).

Upsell items will pop up for selection, clicking on YES will add it to the invoice, clicking on NO will dismiss the item. The selected items will be added onto the document pulling through the quantities specified per Upsell item along with the price. Any discount percentages captured on the discount matrix will be applied to the relevant items.



Should you not require the Pop-Ups to be activated, you can still activate this function “**manually**” from within any of the Sales Documents by clicking on the Upsell Item icon.



Once selected, all the Upsell Items relating to the items on the Sales Document will appear, allowing you to add the relevant items, changing the recommended quantity.

