

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).

Ĩ	Description	n: Sleeping Bag					_		
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Þ	New 💢 Delete							1	
	Number	Description		Quantity	Sales Invoice	Sales Order	Sales Quote	Freehand Quote	
	GEAR002DP	Daypack (30 - 35 litres)		1	V				
GEAR003STL		Sun-tan Lotion	5	v	v	V	\checkmark		
	GEAR004HW	Handwarmers		1	V		V		
	GEAR005IWB	Insulators for Water Bottles		3	V				
GEAR006WPT		Water Purification Tablets	1	V		V			
	GEAR007H	Headlamp		2	V	v	V		
	GEAR008PS	Polarised Sunglasses		4	V				

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.

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GEAR005IW	B DEFAULT	Insulators for W	Vater Bottle						0.00	01	0	.00			0.0	0
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TC002FJ	DEFAULT	Fleece Jacket							0.00	01	0	.00			0.0	0
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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.

File Edit View Navigate Sales Report ⊖New ∰ Open ≪ ≫ ∰ Adjust 🖄 Credit 🎦 Convert 戻 🖻 👯 🗐 Centers 🧼 Project 🏣 Lines 🚔 Upsell Item & Record 🕋 Print + 1	M &
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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.

Select Upsell Items					×
1 * Number	Select	Upsell Number	Upsell Description	Quantity	Price
Group FW001TB					
FW001TB	V	FW002CT	Cross Trainers	1.00	0.00
Group GEAR001SB					
GEAR001SB		GEAR002DP	Daypack (30 - 35 litres)	1.00	0.00
GEAR001SB		GEAR003STL	Sun-tan Lotion	5.00	0.00
GEAR001SB		GEAR004HW	Handwarmers	1.00	0.00
GEAR001SB		GEAR005IWB	Insulators for Water Bottles	3.00	0.00
GEAR001SB	V	GEAR006WPT	Water Purification Tablets	1.00	0.00
GEAR001SB		GEAR007H	Headlamp	2.00	0.00
GEAR001SB	V	GEAR008PS	Polarised Sunglasses	4.00	0.00
Group TC001MMS					
TC001MMS	v	TC002FJ	Fleece Jacket	1.00	0.00
TC001MMS		TC003SSJ	Soft Shell Jacket	1.00	0.00
TC001MMS	V	TC004WOS	Waterproof Outer Shell	1.00	0.00
TC001MMS		TC005ZOT	Zip-off Trousers	1.00	0.00
TC001MMS	v	TC006WT	Waterproof Trousers	1.00	0.00
TC001MMS		TC007US	Utility Shorts	1.00	0.00
TC001MMS	V	TC008WOG	Waterproof Outer Gloves	1.00	0.00
TCOOLANIC		TCOOOLULUC		4.00	0.00