

SUPPORT DOCUMENT

Related Items and Upselling



palladium
Accounting

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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.

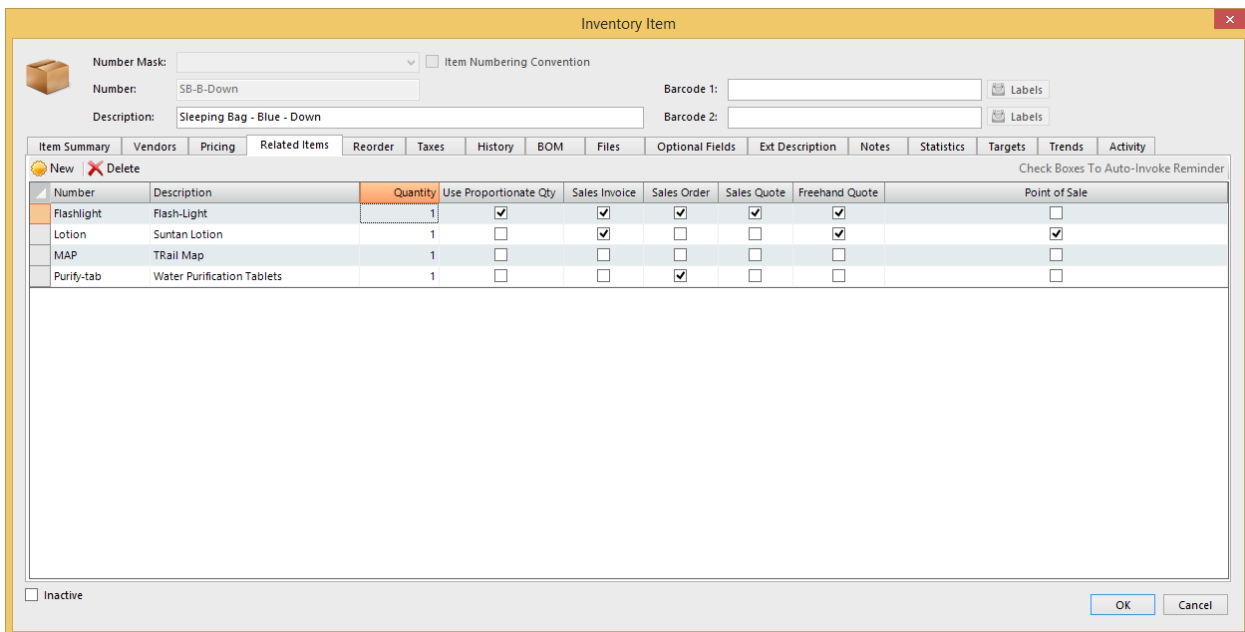
Advantages to Your Business

- 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.
- Can also be used to Relate Items to others such as Item Supersession.

Setup

To Setup Related, or Upsell Items you need to go to **Inventory >> Inventory & Services** and select the Primary Item that you would like to link the Related Items to. Then select the Related Items tab, and select the items that you would like to link to the Primary Item. There are 2 primary settings here as follows:

- **Qty and Use Proportionate Quantity** – this setting will allow you to change the ratio of Primary Items to the Related Items. An example for this would be that you may require 2x Battery Packs for every 1x Torch sold.
- **Auto-Invoke Reminder** (as signified by the check boxes) – when selected, the system will prompt, or auto-invoke the user to purchase the respective related item as soon as the Primary item is selected for the respective processing function such as Sales Invoices or even Point of Sale.



Note

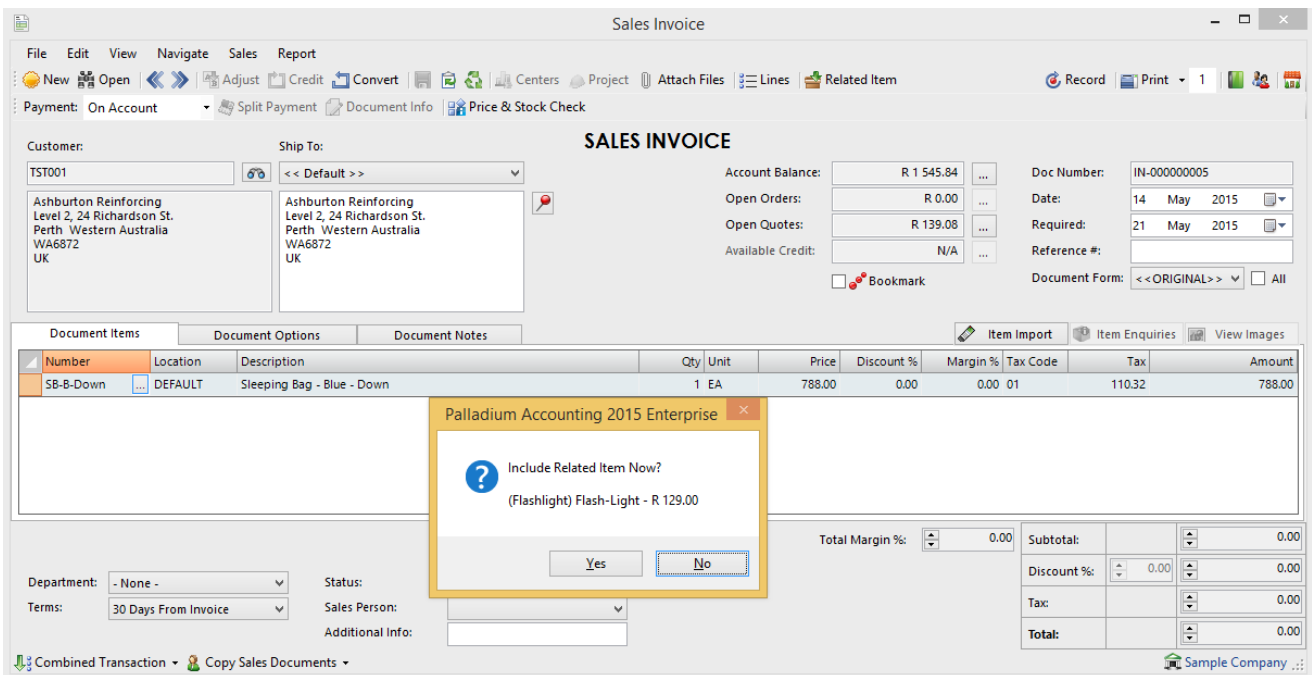
You can still view the related items on sales documents at any stage without setting them as “auto-invoke” as detailed below.

Processing

To use the function generate a sales document and select the Primary/Linked Item. There are 2 ways in which we can access and select the Related Items from the various Sales Items, either as an Auto-Invoke or a Manual Selection as detailed below.

Auto-Invoke

In the example above we have set the Sleeping Bag as the Primary Item, and have set the Flashlight and Suntan Lotion as Auto-Invoke Items. On selecting the Sleeping Bag, you will see that the system automatically prompts to add the related Items.



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Manual Invoking

We can manually invoke the Related Items at any time by selecting the Related Items Button on the sales form that will allow you to select the required related items.

