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Cross/UpSell

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Overview

The Cross/UpSell module creates an easier way to make specific CrossSells or UpSells when entering an item on an order.

The CrossSells and UpSells specific to an item are displayed in a separate window during order entry (docked to the side of the line items grid).

Choosing the UpSell option will replace the current line with the new UpSell item, while selecting a CrossSell will similarly add those new items to the order automatically. The configured CrossSells can have associated discounts automatically applied, and can optionally not be displayed if there is not stock available. There is also the option to only display a CrossSell or UpSell option when the item being purchased is backordered.

Setup and Maintenance

The Cross/UpSell Item Maintenance module is available under the menu CrossUpSell, or from the ribbon under the Cross/UpSell tab.

	🗞 Cross/UpSell Ma	aintenance 🗙							
C	🗋 Close 🛛 🛃 Save	e							
	Root Items			Associa	ted Cross/UpS	ell Items			
	🚽 New 🕌 Dele	te		骨 Nev	v 💢 Delete	🍪 Edit 👔 Res	equence		
	Item Number	Description	1	Seq 🔺	Item Num	Description	Item Class C	Discount Perc	Pitch
	100XLG	Green Phone		и Ту	pe: CrossSel				
	128 SDRAM	128 meg SDRAM		10	HD-20	20 Gig Hard Dr	RM-ACT	0.00	
	<u>HD-20</u>	20 Gig Hard Drive		20	HD-40	40 Gig hard dri	RM-ACT	0.00	
				30	HD-60	60 Gig hard dri	RM-ACT	0.00	
			1	40	3-83813A	Keyboard	COMPONENTS	10.00	10% off computer accessories when buying RAM!
				50	1-A3261A	Multi-Core Pro	SERVERS-1	0.00	
				⊿ Ту	pe: UpSell				
				10	256 SDRAM	256 meg SDRAM		0.00	Memory is CHEAP! Do you want to upgrade to 256 MB sticks o
				20	512 SDRAM	512 MEG RAM	RM-ACT	0.00	Memory is CHEAP! Do you want to upgrade to 512 sticks of R

On the left-hand side, "Root Items" can be created and deleted. These items will have the particular CrossSell and UpSells created for them on the right-hand side. The associated CrossSells and UpSells will be displayed for a particular root item when entering the root item onto the order.

In the example above, the root item "128 SDRAM" is selected, notice the miscellaneous CrossSells available but also the UpSell options. "256 SDRAM" and "512 SDRAM" do not make much sense as a CrossSell to the currently being purchased RAM, but rather as UpSell options. Somebody coming in to buy 128 SDRAM probably does not want to hear a sales pitch about how they should also buy 256 SDRAM to accompany their purchase of 128 SDRAM. Instead, we want to help provide a sales pitch for buying a 256 SDRAM instead of their initially desired 128 SDRAM.

Clicking on the 256 SDRAM row and selecting Edit opens the window for editing the CrossSell or UpSell. This same window is opened when clicking the New button, but with blank values for the various options.

Edit Cross/UpSell Line			□ ×
Seq Type Item Number Hide When Item Is Backordered Only Show When Root Backordered Discount Percent	10 UpSell V 256 SDRAM ···· V 0.00000	Pitch Memory is CHEAP! Do you want to upgrade to 256 MB sticks of RAM instead?	< >
		OK Can	cel

You'll also notice for each CrossSell and UpSell that you can define a pitch from within the edit screen when trying to sell the CrossSell or UpSell.

The "Hide When Item Is Backordered" checkbox will hide the display of the CrossSell or UpSell if the CrossSell or UpSell item is backordered. Depending on the item and business, we might only want to offer a CrossSell or UpSell to a customer if the item we are offering is available in stock.

Similarly, the "Only Show When Root Backordered" checkbox will hide the display of the CrossSell or UpSell if the root item is in stock. In some circumstances, it could be desired to only suggest alternatives to the item being entered on the order if the item is not in stock.

The "Discount Percent" option is only available on CrossSells. UpSells cannot receive discounts. When choosing a CrossSell that has a discount, the discount percent field will automatically be applied to the CrossSell line that is added to the order.

Order Entry

Entering the root item 128 SDRAM onto an order, the Cross/UpSell Items screen automatically appears and docks itself to the sales line item grid.

ļ	ine Items	Notes	Addresses	Holds	User	Fields	Audit	Relat	ited Documen	ts P	Purchase	s	Quick Rep	ort	FedEx Q	uote E	imail Audit	Assemblies	Tracking Numbers	Interact	ions Ship	ment	•
	New 🙀	Delete	📫 Insert 🛛		Item 128 S	Numb Ite	em Class Co	IX UOF PHC	fM Schedi vail ONE 1-10 -	able On 1.00	hand 10.00	Cro	oss/UpSel	Iten	ıs							# ×	c
	(ALL) [1]	SEQUEN	CE LOWEST	HIG	HEST	(BLANK)	[1]				_												
	Item	Desc	ription	Qty L	NfM	Price	Ext P	Price R	Reg Ship	Qty	y BO			Item	Number	Descriptio	n	Item Class Code	Discount Percent	Price	Price Diff	Available	
Ð	128 SDR/	AM 128 r	meg SDRAM	1 E	ACH	135.20	135	5.20 1	12/3/2019		0	-4	Type: Cro	ossSe	:11								
														HD-2	20	20 Gig Ha	rd Drive	RM-ACT	0.00	0.00	0.00	20.00	
														HD-4	<u>10</u>	40 Gig ha	rd drive	RM-ACT	0.00	0.00	0.00	20.00	
														HD-6	<u>i0</u>	60 Gig ha	rd drive	RM-ACT	0.00	0.00	0.00	20.00	
														<u>3-83</u>	813A	Keyboard	1	COMPONENTS	10.00	90.00	0.00	46.00	
														<u>1-A3</u>	26 1A	Multi-Core	e Proce	SERVERS-1	0.00	32,000	0.00	-2.00	
												-4	Type: Up	Sell									
														256	SDRAM	256 meg 9	SDRAM		0.00	229.95	94.75	6.00	
														<u>512</u>	SDRAM	512 MEG	RAM	RM-ACT	0.00	300.00	164.80	5.00	
												P	itch										ĺ.
												l 6	Memory in C		Dowour	ant to uno	wada to 25	6 MR obels of DAM	Linetand?				
												11	Heritory is C	TILAP	Do you w	ant to upg	paue to 25	IO PID SUCKS OF RAP	" listeau:				
												L										\sim	
																					ليليه		Ľ
							135	i. 20													Add		

When selecting an individual row, users are provided the sales pitch entered in the maintenance screen. There are also a few columns available for viewing that are not available from the maintenance screen. The Price column shows the price of the item as if it were added as a line on the order. For UpSells, the 'Price Diff' column calculates out the difference from the price on the current root item, to the price of the UpSell. In this case, the 256 SDRAM will cost 94.75 more than the current 128 SDRAM on the order.

Using the checkbox on the left, multiple CrossSells can be applied to the order at one time. Multiple UpSells cannot be selected at the same time, and UpSells cannot apply at the same time as CrossSells are being added to the order.

Line Ite	ns No	otes	Address	es	Holds	Liser	Fields	Audit 6	elated Documer	nte P	urchas	es	Ouick Reny	ort FedEv	Quote	Email Audit	Assemblies	Tracking Numbers	Interact	ions Shin	ment
E Alexa		lata	I me la cat		Tionad	Item	Numb Ite	m Class Cox	UOfM Schedu va	lable Onl	hand [Quernep	are predex	Quote		Habemblied	Troosing Number 9	Interact		
ivew	Re Dei	lete	insert		-	128	SDRAM		PHONE 1-10	-1.00 1	10.00	Cro	ss/UpSel	Items							т×
(ALL) [IJ SE	QUE	VCE LOV	VEST	HIG	HEST	(BLANK)	[1]			_				_						
Item		Des	cription		Qty L	JOfM	Price	Ext Pric	e Req Ship	Qty	BO	Ľ.,		Item Number	Descrip	ption	Item Class Code	Discount Percent	Price	Price Diff	Available
IX 128	SDRAM	128	meg SDRAM	М	1 E	EACH	135.20	135.2	0 12/3/2019		0	-4	Type: Cro	ssSell							
														HD-20	20 Gig	Hard Drive	RM-ACT	0.00	0.00	0.00	20.00
														HD-40	40 Gig	hard drive	RM-ACT	0.00	0.00	0.00	20.00
														HD-60	60 Gig	hard drive	RM-ACT	0.00	0.00	0.00	20.00
													~	<u>3-B3813A</u>	Keyboa	ard	COMPONENTS	10.00	90.00	0.00	46.00
													¥	1-A3261A	Multi-C	ore Proce	SERVERS-1	0.00	32,000	0.00	-2.00
												4	Type: Ups	5ell							
												-		256 SDRAM	256 me	eg SDRAM		0.00	229.95	94.75	6.00
														512 SDRAM	512 ME	EG RAM	RM-ACT	0.00	300.00	164.80	5.00
												P	itch								
												16	10% off com	puter accesso	ories wher	n buying RAM					~
																					\sim
											_									Add	
								135.2)												

Clicking the Add button with these selections automatically adds the items to the order.

Ų	ne Items	No	ites Ad	ddresses	Hold	ls Use	er Fields	Audit Re	lated Docume	nts Purcha	ases	Quick Repo	rt FedEx (Quote Email Audi	Assemblies	Tracking Numbers	Interact	ions Ship	ment 👘 🕬
	New 🙀	Del	ete 🛛 📫	Insert		Ite	m Numb Ite >-20 R/	em Class Cox U 4-ACT E	IOfM Schedi vi ACH	ailable Onhand 20.00 20.00	Cr	oss/UpSell 1	Items						# ×
(ALL) [4]	SEC	QUENCE	LOWEST	гн	IGHEST	(BLANK)	[4]											
•	Item		Descriptio	n	Qty	UOfM	Price	Ext Price	Req Ship	Qty BO	-		Item Number	Description	Item Class Code	Discount Percent	Price	Price Diff	Available
İΧ	128 SDR	AM	128 meg	SDRAM	1	EACH	135.20	135.20	12/3/2019	0	-	Type: UpS	ell						
	HD-20	••••	20 Gig Ha	ard Drive	1	Each	0.00	0.00	12/3/2019	0			HD-40	40 Gig hard drive	RM-ACT	0.00	0.00	0.00	20.00
	3-B3813/	A	Keyboard	ł	1	Each	100.00	90.00	12/3/2019	0			HD-60	60 Gig hard drive	RM-ACT	0.00	0.00	0.00	20.00
!	1-A3261	A	Multi-Core	e Proc	1	Each	32,00	32,000.00	12/3/2019	0									
												Pitch							
																			~
																			~
								32,225.20										Add	

The customer chose to CrossSell an HD-20, when HD-20, HD-40, and HD-60 were all available as CrossSell options on 128 SDRAM. Now, with line HD-20 selected and the maintenance screen setup accordingly, the individual HD-20 line can have its own associated CrossSell and UpSells. In this case, HD-20 has HD-40 and HD-60 available as UpSells. In this way, CrossSells and UpSells can continue to chain together until the customer is satisfied.

Now, 128 SDRAM ram is selected again, with the 256 SDRAM ram row selected to perform an UpSell.

	ine Items	No	tes Add	Iresses	Holds	User	r Fields	Audit Re	lated Documents	Purcha	ases	Quick Rep	port FedEx	Quote Email Au	dit Assemblies	Tracking Numbers	Interact	tions Ship	ment
	New 🙀	Dele	te 📫 In	sert 🛛		Item 128	SDRAM	m Class Cox U P	OfM Schedi vailab HONE 1-10 -1	ole Onhand 00 10.00	C	ross/UpSe	I Items						# ×
L	(ALL) [4]	SEQ	UENCE	LOWEST	HD	GHEST	(BLANK)	[4]			_								
	Item		Description		Qty	UOfM	Price	Ext Price	Reg Ship	Qty BO			Item Number	Description	Item Class Code	Discount Percent	Price	Price Diff	Available
Ð	128 SDR	AM	128 meg Si	DRAM	1	EACH	135.20	135.20	12/3/2019	0		J Type: Cr	ossSell						
	HD-20		20 Gig Hard	d Drive	1	Each	0.00	0.00	12/3/2019	0			HD-20	20 Gig Hard Driv	RM-ACT	0.00	0.00	0.00	20.00
	3-B3813	A	Keyboard		1	Each	100.00	90.00	12/3/2019	0			HD-40	40 Gig hard drive	RM-ACT	0.00	0.00	0.00	20.00
!	1-A3261	A	Multi-Core	Proc	1	Each	32,00	32,000.00	12/3/2019	0			HD-60	60 Gig hard drive	RM-ACT	0.00	0.00	0.00	20.00
													3-83813A	Keyboard	COMPONENTS	10.00	90.00	0.00	46.00
													1-A3261A	Multi-Core Proce	SERVERS-1	0.00	32,000	0.00	-2.00
												🛛 Type: Up	Sell						
												\checkmark	256 SDRAM	256 meg SDRAM		0.00	229.95	94.75	6.00
													512 SDRAM	512 MEG RAM	RM-ACT	0.00	300.00	164.80	5.00
												Pitch							
												Manageria			OFC MD all day of DA	M instand 2			
												Memory is C	UREAP! Do you	want to upgrade to	256 MD SUCKS OF RA	minsteaur			
																			\sim
								32,225.20										Add	

Clicking the Add button with this UpSell selected results in the following change to the order.

ļ	ine Items	No	tes	Addresses	Ho	olds	User	Fields	Audit Re	lated Documents	Purcha	ses	Quick Repo	rt FedEx	Quote	Email Audit	Assemblies	Tracking Numbers	Interact	ions Ship	oment	4
	New 🙀	Dele		Insert [T	HIGH	Item 128 S	Numb Ite SDRAM (BLANK)	m Class Cox U Pi [4]	OfM Sched: vailable HONE 1-10 -1.00	Dnhand 0 10.00	Cr	oss/UpSell	Items							3	×
•	Item		Descrip	tion	Q	ty U	OfM	Price	Ext Price	Req	Qty BO	•		Item Number	Descrip	tion	Item Class Code	Discount Percent	Price	Price Diff	Availab	de
	256 SDR	AM	256 me	g SDRAM		1 E	ach	229.95	229.95	12/3/2019	0	-	Type: Cro	ssSell								
	HD-20		20 Gig H	Hard Drive		1 Ea	ach	0.00	0.00	12/3/2019	0			HD-20	20 Gig H	Hard Drive	RM-ACT	0.00	0.00	0.00	20.0	00
	3-B3813/	Ą	Keyboa	rd		1 Ea	ach	100.00	90.00	12/3/2019	0			HD-40	40 Gig	hard drive	RM-ACT	0.00	0.00	0.00	20.0	00
!	1-A3261	A	Multi-Co	ore Proc		1 Ea	ach	32,00	32,000.00	12/3/2019	0			HD-60	60 Gig	hard drive	RM-ACT	0.00	0.00	0.00	20.0	00
														<u>3-83813A</u>	Keyboa	ard	COMPONENTS	10.00	90.00	0.00	46.0	00
														1-A3261A	Multi-Co	ore Proce	SERVERS-1	0.00	32,000	0.00	-2.0	00
												-	4 Type: Up9	iell								
													~	256 SDRAM	256 me	g SDRAM		0.00	229.95	94.75	6.0	90
														512 SDRAM	512 ME	GRAM	RM-ACT	0.00	300.00	164.80	5.0	10
												E.	Pitch									
													Memory is Ch	EAPI Do you	want to u	ipgrade to 25	6 MB sticks of RA	M instead?			<u>^</u>	ı İ.
																					\vee	
$\left\ - \right\ $																				Add		1
									32,319.95													-

Notice 256 SDRAM has replaced the current 128 SDRAM item on the order. Also notice that the Cross/UpSell Items screen is now blank. The maintenance window does not have any CrossSell or UpSells defined for this particular 256 SDRAM item. If CrossSells or UpSells were available on 256 SDRAM, they would have been displayed.

Global Cross/UpSells

It is possible to define a list of CrossSells and UpSells that apply to all root items automatically. If there is a product that should always be available for CrossSell across all inventoried items, global CrossSells will alleviate having to create the CrossSell option on every inventory item in the system. It is possible to create a global UpSell, where selling any product has the option available to UpSell to a specific different product. If this is not useful, then simply do not define global UpSell options.

Global CrossSells and UpSells are defined just like any other CrossSell or UpSell on a root item, except it is done against a specific root item number. By default, the specific root item number is "GLOBAL", and is defined in the setting Global Cross/UpSell Item Number. Whenever a CrossSell or UpSell is added to the root item specified in this setting, the CrossSell or UpSell will be visible for selection within the Cross/UpSell Items screen during order entry.

Security and Application Settings

Below, you'll find a list of all relevant securities and settings associated with the CrossSell/UpSell module:

Securities

🗸 Sele	ect All 🛛 💳 Select None 🛛 🖳 Copy From		Search 🕜 Search Selected for Documentation
Acce	Name		^ ^
	RBC Cross		
~	Cross/UpSell Maintenance		
\checkmark	Sales Line Cross/UpSell*		
×	Contains([Name], 'cross') 👻		Edit Filter
	sc	*	
✓ Mi			
✓ Mi Au	to Run and Dock	False	>
 Mi Au Au 	to Run and Dock toRun	False False	~
Y Mi Au Au Ma	to Run and Dock toRun x CrossSells To Display	False False 3	~
✓ Mi Au Au Ma Ma	to Run and Dock toRun x CrossSells To Display x UpSells To Display	False False 3 3	·

- Cross/UpSell Maintenance Maintenance Screen for Sales Line Cross/UpSell plugin.
- Sales Line Cross/UpSell Sales Line Cross/UpSell. This plugin docks to the side of the Sales Lines for easy access.
 - Auto Run and Dock Automatically run and dock the Sales Line Alt Sell Plugin when opening an existing document. (Default Value: False)
 - $\circ~$ AutoRun Automatically run the Sales Line Alt Sell Plugin for new line items. (Default Value: False)
 - \circ Max CrossSells To Display Determines the maximum number of CrossSells that will be

displayed at once. Set to 0 for unlimited results. (Default Value: 3)

- Max UpSells To Display Determines the maximum number of UpSells that will be displayed at once. Set to 0 for unlimited results. (Default Value: 3)
- Preserve Focused Row When set to "True", keeps the current row selected when adding CrossSell items. (Default Value: False)

Settings

Settings ×									
🔟 Close 🛛 📙 Save 🔋 🐻 Export Settings 🛛 🥮 Import Settings 🦃 Export Settings List									
ter:									
oss									
✓ Cross/UpSell Items									
Additional Item Types	CrossSell;								
Cross/UpSell Source Sales Line UDF	Cross/UpSell Source Sales Line UDF								
Global Cross/UpSell Item Number	Global Cross/UpSell Item Number GLOBAL								
Replacement Item Types UpSell;									

- Additional Item Types Semicolon delimited list of alt sell line types that will be added alongside a root item. (Default Value: CrossSell;)
- Replacement Item Types Semicolon delimited list of alt sell line types that will replace a root item. (Default Value: UpSell;)
- Cross/UpSell Source Sales Line UDF Name of the Sales Line Item UDF for the source of the item from a Cross/UpSell. C = CrossSell, U = UpSell, G = Global
- Global Cross/UpSell Item Number Item Number of the root item used for global CrossSells and UpSells. CrossSells and UpSells under this root item number will show up for all items globally. (Default Value: GLOBAL)