Cross/UpSell

Cavallo Support - 2024-12-03 - Sales

Overview

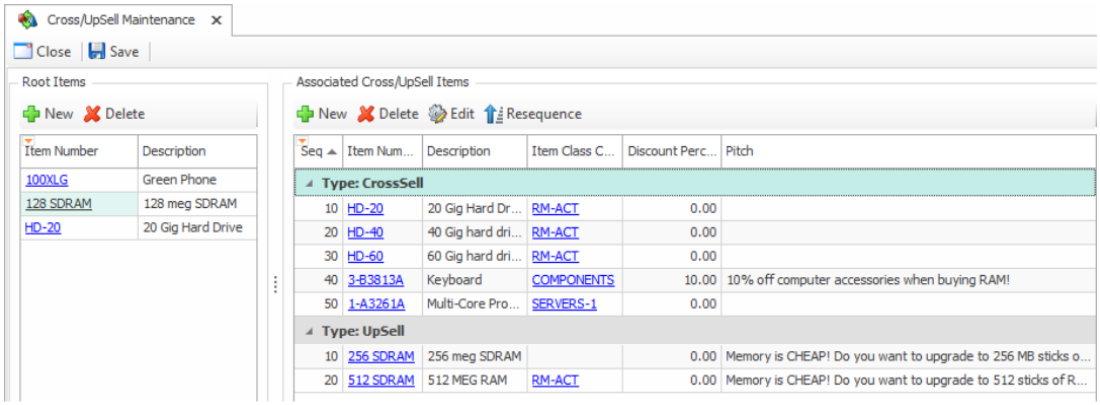
The Cross/UpSell module creates an easier way to make specific CrossSells or UpSells when entering an item on an order.

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

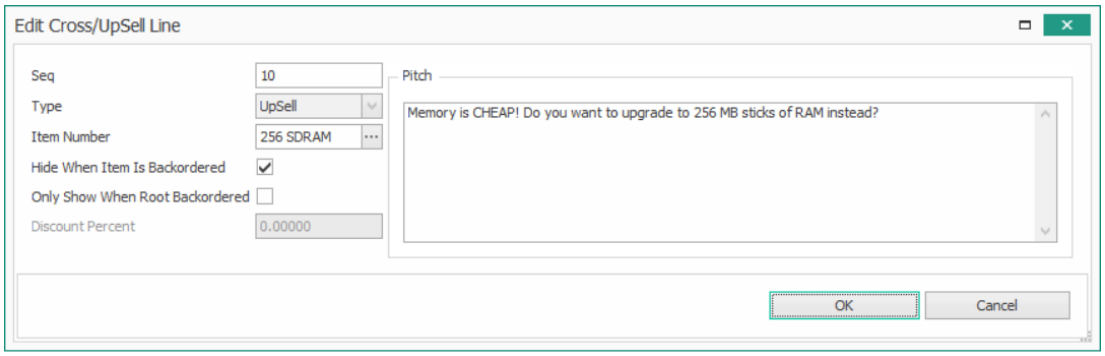
The Cross/UpSell Item Maintenance module is available under the menu CrossUpSell, or from the ribbon under the Cross/UpSell tab.



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.



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.

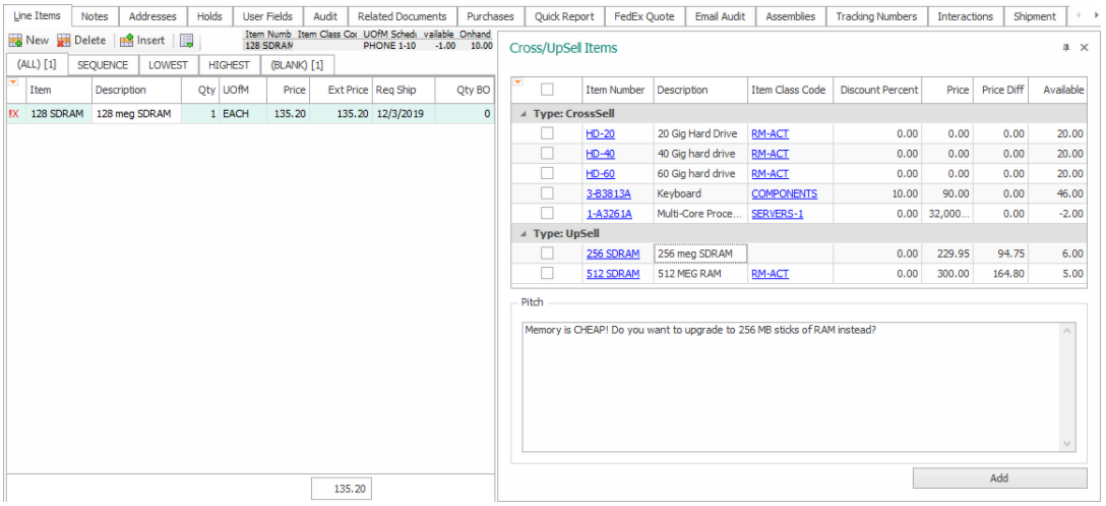
The "Hide When Item Is Backordered" checkbox will hide the display of the CrossSell or UpSell if the CrossSell or UpSell item is backordered. Depending on the item and business, we might only want to offer a CrossSell or UpSell to a customer if the item we are offering is available in stock.

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.

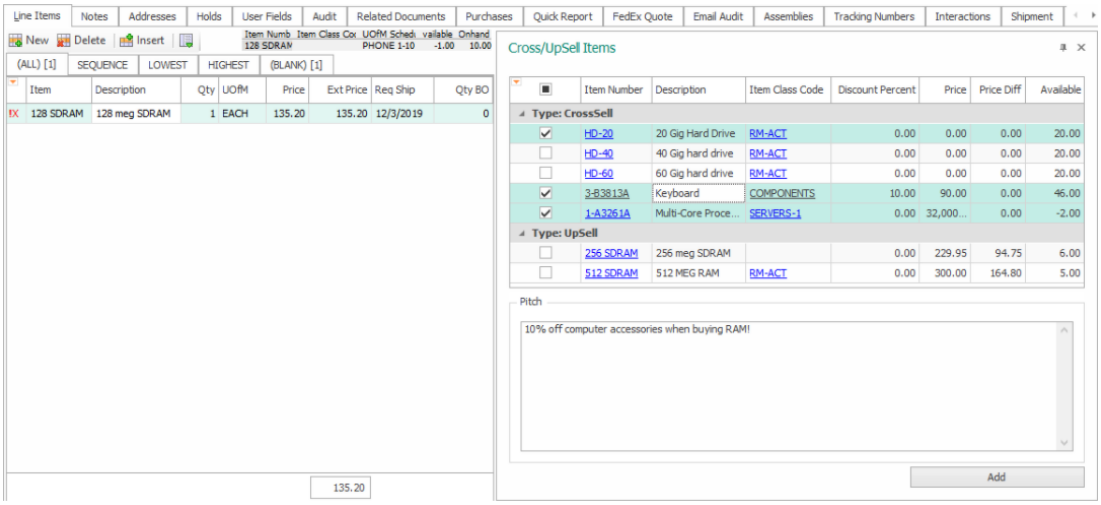
Order Entry

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.

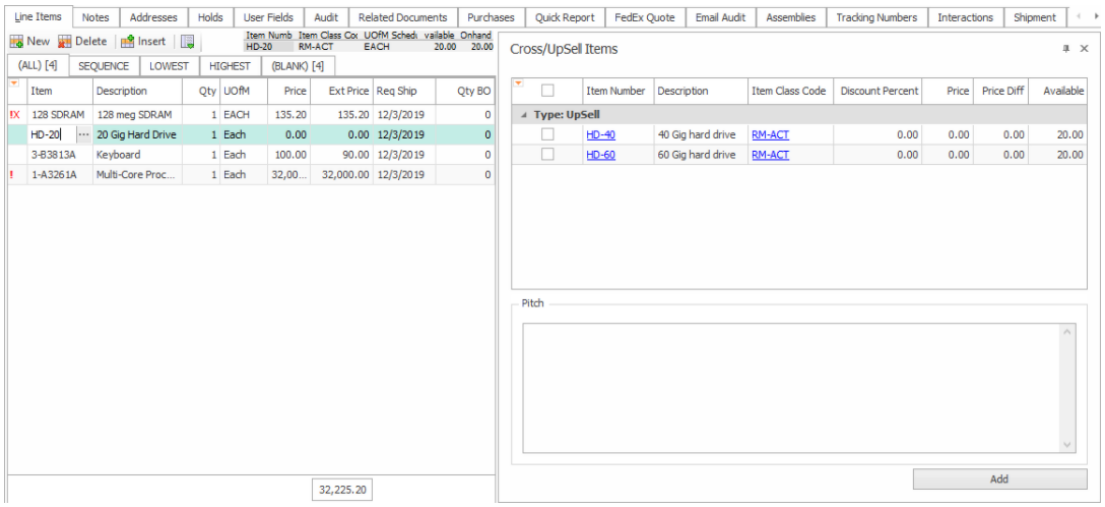


When selecting an individual row, users are provided the sales pitch entered in the maintenance screen. There are also a few columns available for viewing that are not available from the maintenance screen. The Price column shows the price of the item as if it were added as a line on the order. For UpSells, 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.

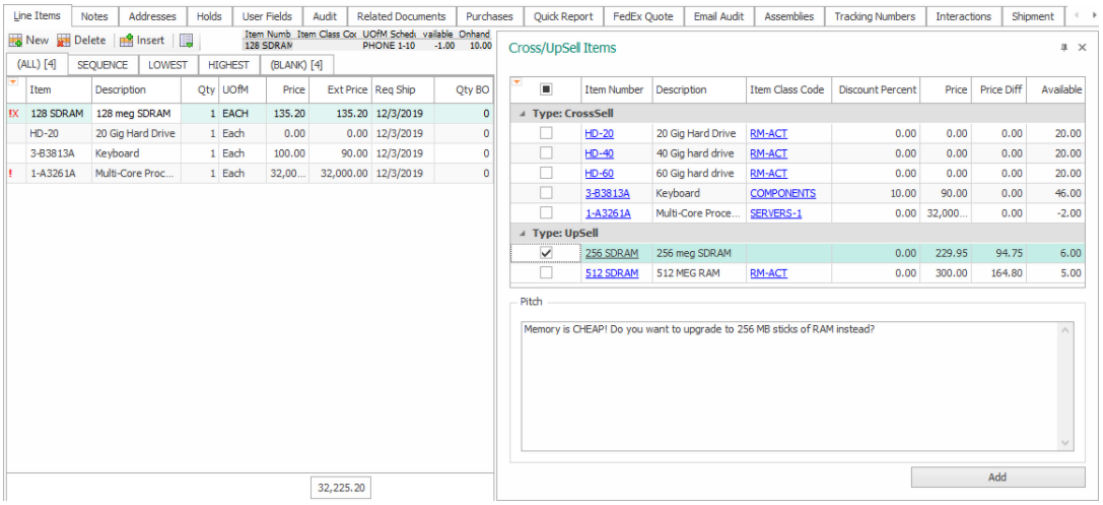


Clicking the Add button with these selections automatically adds the items to the order.

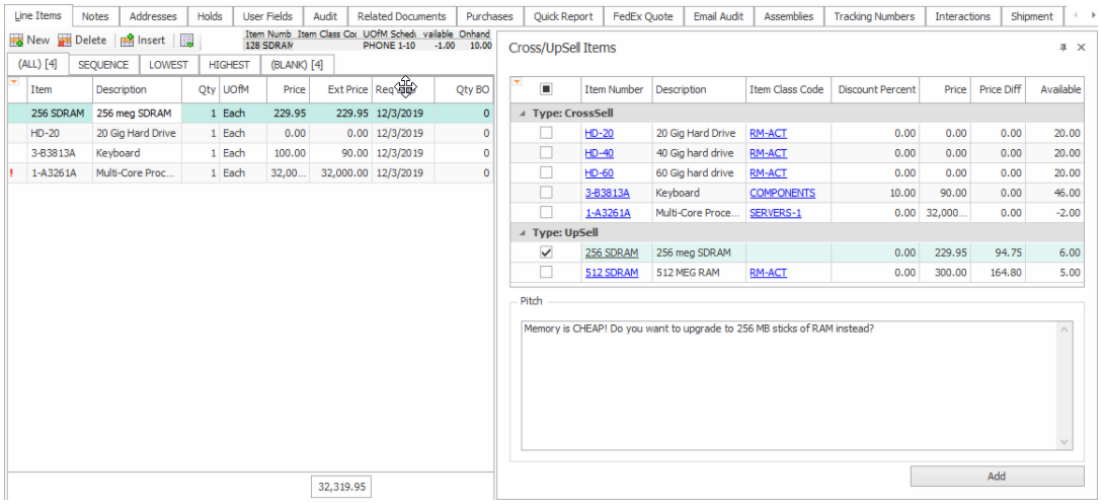


The customer chose to CrossSell an HD-20, when HD-20, HD-40, and HD-60 were all available as CrossSell options on 128 SDRAM. Now, with line HD-20 selected and the maintenance screen setup accordingly, the individual HD-20 line can have its own associated CrossSell and UpSells. In this case, HD-20 has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



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



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

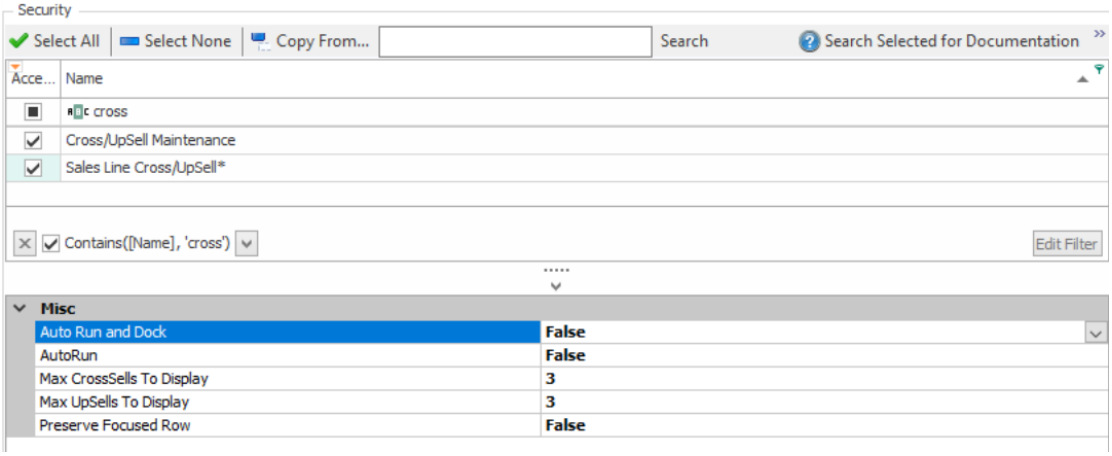
It is possible to define a list of CrossSells and UpSells that apply to all root items automatically. If there is a product that should always be available for CrossSell across all inventoried items, global CrossSells will alleviate having to create the CrossSell option on every inventory item in the 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:

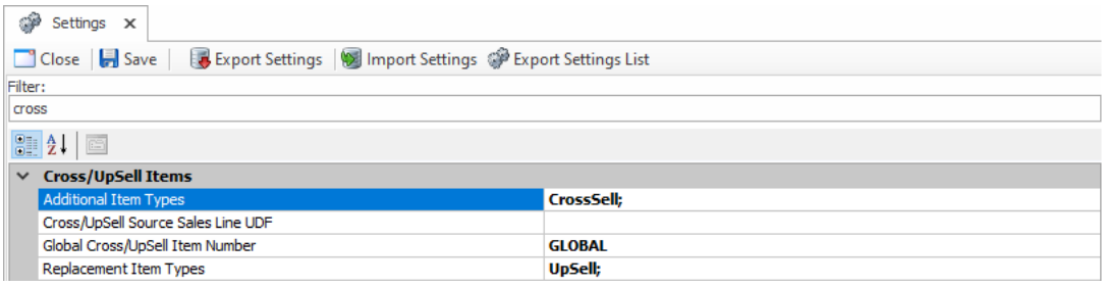
Securities



- 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)
    - AutoRun - Automatically run the Sales Line Alt Sell Plugin for new line items. (Default Value: False)
    - 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



- 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)