



AccountMate Software That Fits

AccountMate's Upsell Management module brings greater profitability to the sales order process.

You can maintain a list of accessory or upsell items that are available for sale with other inventory items, view and select these upsell items when processing customer orders and separately track upsell item sales for commission purposes. Even create a script or provide special instructions that your sales team can use as a guide in selling the upsell items.

The Upsell Management module integrates with AccountMate's Sales Order, Accounts Receivable, Inventory Control and Inventory Specification modules to enhance the sales process.

AccountMate 7 for SQL or Express Upsell Management Module

Maintain a List of Accessory Items per Inventory Item

Define what accessory or complementary items may be sold along with a particular inventory item. This allows you to boost sales of slower moving products by "piggy-backing" them on faster moving inventory. Even assign items that have specification as upsell items for other inventory items, such as up selling off-road bicycle accessories when a mountain bike is ordered.

Ease in Processing Upsell Item Sales

View a list of upsell items for each line item as they are being entered into a sales order or invoice. The system will show the prices for each upsell item and the corresponding inventory quantities to facilitate the sales process. Simply enter the order quantities for the upsell items that the customer selects and the system will automatically add the upsell items to the original items ordered.

Up Selling by Item Specification

The option is available to set up an upsell item list that applies to all assigned specifications of an item (i.e. accessories for all bicycles) or set them up separately per item specification. The option that best suits the products and the customers' buying patterns can be selected.

Item #	Description	Warehouse	U of M	Ship Qty	Unit Price
HDSET-BLUTOOTH	Bluetooth Headset	MAIN	EACH	2	49.99
PHN-TOOLS	Cellphone Tools	MAIN	SET	1	24.99
PHN-CASE-CLIP	Cellphone Clip-on Case	MAIN	EACH	0	4.99
SWV-HOLSTER	Cellphone Swivel Holster	MAIN	EACH	1	4.19

Item # HDSET-BLUTOOTH Warehouse MAIN

Description Bluetooth Headset In-process 0

Specification In-transit 0

Class / Prod Ln PHONE On-order 30

U of M / Weight EACH 0.00 On-hand 20

Unit Price 49.99 Booked 19

Available 1

OK Cancel

Upsell Item Selection Window in Transactions

Track Commissionable Upsell Item Sales

Items sold through the upsell process are flagged accordingly on orders and invoices. This information is especially helpful if your company wants to calculate a separate commission on upsell item sales.

Build Upsell Item Sales Scripts

Special instructions or sales scripts can be set up for salespeople to follow when up selling each item. These instructions or scripts can be entered in a notepad when setting up upsell item records and are available when the upsell item list is viewed.

Integration with Sales Order, Accounts Receivable, Inventory Control and Inventory Specification Modules

- Integration with the Sales Order, Accounts Receivable and Inventory Control modules allows for the maintenance of a list of complementary or accessory items that can be sold along with other inventory items. You are able to view and select upsell items when processing orders or invoices as well as create a script that the sales team can use as a guide when up selling these items. Throughout the sales process, you will be able to track the sales of these items for commission purposes.

- Integration with the Inventory Specification module provides the ability to set up a separate list of accessory or upsell items for each item specification, and to designate a particular item specification for a qualified upsell item.

Other Feature

Upsell Item Listing report cross-references upsell items and inventory items.

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