AccountMate 11 for SQL or Express
Upsell Management Module

AccountMate's Upsell Management module provides tools you can use to help boost your sales. It allows you to maintain a list of accessory or upsell items that can be offered to customers who buy specific inventory items. You can view this list and select the upsell items when processing customer orders. You can also track upsell item sales for commission purposes. Even create a script or provide special instructions that your sales team can use as a guide when selling the upsell items.

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

Maintain a List of Accessory Items per Inventory Item

You can specify what accessories or complementary items go well with a particular inventory item. This can encourage sales of slower moving products by "piggy-backing" them on more popular inventory. You can also assign items that have specification as upsell items for other inventory. For example, you can up sell tablet cases of a compatible size that come in different colors when a customer buys a tablet.

Ease in Processing Upsell Item Sales

You can view a list of upsell items for each line item as it is being added to a sales order or invoice. The system will show the unit price of 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 wants and the system will automatically add these upsell items to the original items ordered.

Upsell Item Selection Window in Transactions

Upselling by Item Specification

This module gives you the option to create an upsell item list that applies to all assigned specifications of an item (e.g. a list of tablet accessories that are compatible regardless of the color of the tablet) or set them up separately per item specification (e.g. a separate list of tablet accessories for each color of the tablet). Select the option that best suits the products and the customers' buying patterns.

Track Commissionable Upsell Item Sales

Items sold through the upsell process are flagged accordingly on sales orders and invoices. This information can be useful if your company wants to implement a different commission scheme for upsell item sales as an added incentive to your sales staff.

Build Upsell Item Sales Script

Special instructions or "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 creating upsell item records and are available to the salesperson when viewing the upsell item list.

Integration with Sales Order, Accounts Receivable and Inventory Specification Modules

• Integration with the Sales Order and Accounts Receivable modules allows your salespeople to view a list of complementary or accessory items that they can offer customers when processing orders or invoices. The notepad can be used to provide special instructions or reminders to your sales staff about on-going specials that apply to any of the upsell items. It can even be used to provide a script that sales operators can read while taking orders over the phone. You are also able to track upsell item sales for commission purposes.

• Integration with the Inventory Specification module allows you to set up a separate list of accessories or upsell items for each item specification and to designate a particular item specification for an upsell item.

Other Features

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

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