AccountMate

Software That Fits

AccountMate's Upsell Management module brings greater flexibility to customer order processing. With it 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. You can 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 and Inventory Control modules.

AccountMate 7 for LAN Upsell Management Module

Maintain a List of Accessory Items per Inventory Item

Users can define what accessory or complementary items may be sold along with a particular inventory item. This allows users to boost sales of slower moving products by "piggy-backing" them on faster moving inventory.

Upsell Item Selection Window in Transactions

Ease in Processing Upsell Item Sales

Users can view a list of upsell items for each line item they are entering into a sales order or invoice. The system also shows 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 the customer selects. Then click "OK" and the system will automatically add the upsell items to the original items ordered.

Track Commissionable Upsell Item Sales

Items sold through the upsell process are flagged accordingly on orders and invoices. This information helps users who may want 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 user views the upsell item list from the sales order or invoice processing screen.

Integration with Sales Order, Accounts Receivable and Inventory Control Modules

Integration with the Sales Order, Accounts Receivable and Inventory Control modules enhances their basic functionalities to allow users to:

• Maintain a list of complementary or accessory items that can be sold along with other inventory items

• View and select upsell items when processing orders or invoices

• Create a script that the sales team can use as a guide when up selling these items

• Track the sales of these items for commission purposes

Other Feature

Upsell Item Listing report facilitates review of upsell items set up for inventory items

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