

AccountMate's Upsell Management module can be a powerful tool to help cultivate more sales opportunities for your business. With it, you can maintain a list of accessory items 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 to enhance your sales process.

AccountMate 12 for LAN Upsell Management Module

Maintain a List of Accessories per Inventory Item

Users can designate the accessories or complementary items that can be sold along with a particular inventory item. This allows users to boost sales of slower-moving products by "piggybacking" them on faster-moving inventory.

Ease in Processing Upsell Item Sales

Users can see a list of upsell items for each line item they are adding to a sales order or invoice. AccountMate shows the selling price for each upsell item and the inventory quantities (i.e., on-hand quantity, booked quantity, available quantity, etc.) to facilitate the sales process. Simply enter the order quantities for the upsell items the customer selects; then, click "OK" and AccountMate will automatically add the upsell items to the original items ordered.

Item #	Description	Warehouse	U of M	Order Qty	Unit Price
AEROCHAIR-A1	Aero A1 Conference Chair	MAIN	EACH	4	320.00
BKCASE-4	Bookcase 4 shelves 12" x 48" x 30"	MAIN	EACH	1	300.00
RED9X12	Carpet 9x12' Red	MAIN	EACH	0	655.20

Item # BKCASE-4
Description Aero A1 Conference Chair
Class / Prod Ln BOOKCASE CLASSIC
U of M / Weight EACH 0.00
Unit Price 300.00

Warehouse MAIN
In-process 0
In-transit 0
On-order 20
On-hand 799
Booked 59
Available 740

Aerochair-A1 is on sale from May 24-27.

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 helps users who may want to calculate a separate commission on upsell item sales.

Create Upsell Item Sales Scripts

Special instructions or sales spiels can be set up for salespeople to follow when upselling each item. These instructions or scripts can be entered in a notepad when creating the upsell item record. Users can see the notepad entries as they view the upsell item list from the sales order or invoice transaction screens.

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. Users can see and select upsell items when processing orders or invoices. Managers can create a script that the sales team can use as a

guide when upselling these items. Throughout the sales process, users will be able to track upsell item sales for commission purposes.

Other Features

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

AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com