



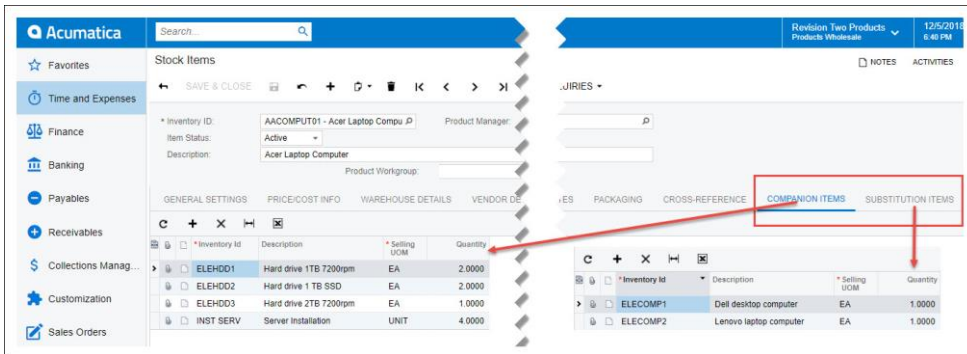
INVENTORY SUBSTITUTIONS & UPSELL

UPSELL MORE & DON'T LOSE SALES DUE TO OUT-OF-STOCK ITEMS

- Easy setup of substitution items and upsell recommendations.
- Quickly find alternate items if a requested item is out of stock.
- Suggest companion items for easy upsells.

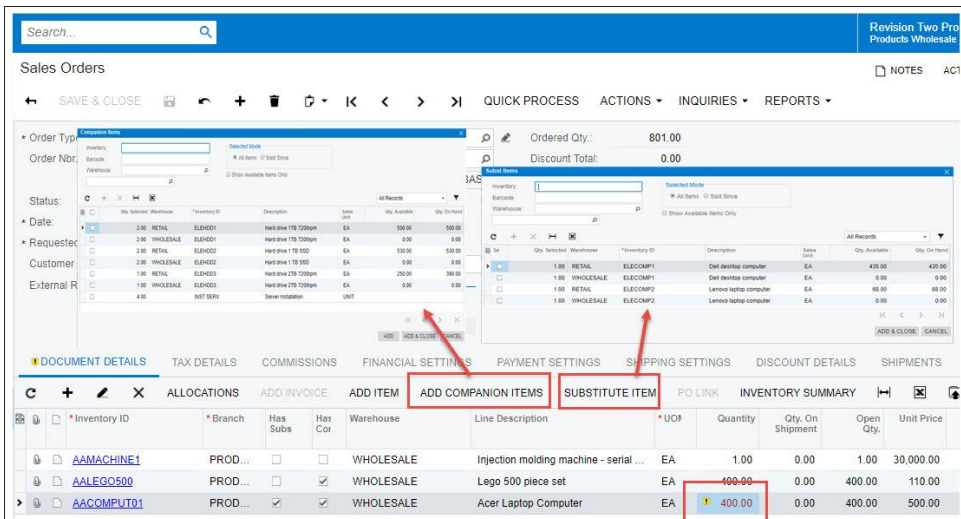
SIMPLE INVENTORY SETUP:

Using the Acumatica Items screen, easily define substitute inventory and companion (upsell) items.



RECOMMENDATIONS AT YOUR FINGERTIPS:

Using the Sales Order screen, this add-on gives users quick access to instant recommendations. Quickly see out-of-stock items, what options are available as replacements, and additional items (companion items) of interest.



KEY BENEFITS

MAXIMIZE SALES

- Provides your team with easy to find inventory substitutions & upsell options
- Don't lose any sales due to out-of-stock items

FILL ALL YOUR ORDERS

- On-the-spot substitutions
- Set up substitution availability by warehouse
- Fulfill all orders quickly
- Keep customers happy

EASILY UPSELL

- Recommend additional items
- Select one or multiple items
- Set up upsell items availability by warehouse
- No more guessing on quantities to purchase





DATA SHEET

INVENTORY SUBSTITUTIONS & UPSELL FEATURES AND CAPABILITIES

Designate Inventory Items

Easily categorize inventory items as substitutions and/o companion items while in the Item Master screen.

Fully Integrated

Substitution and upsell items are shown in the Acumatica Sales Order screen.

Substitution Button

If you don't have the quantity needed to fulfill an order, click on the Substitution tab and you will see a list of recommended substitute items.

Swap Items in the SO

Quickly replace the out-of-stock items in a sales order with the new substitute item and finish the order.

Add or Upsell with Companion Items

With one click, you can view complementary items available in the details area. Easily add those to the order.

Visual Cues

Easy-to-see checkboxes quickly indicate the availability of substitute or companion items; there is no need to open an additional screen.

Warehouse Views

For any product, view the substitution and companion item availability by warehouse.

Quantity Adjustments

If necessary, different quantities will be recommended for the substitution/upsell products.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house, or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

Get a single version of the truth:

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per-user pricing – system scales as your business grows



Inventory Substitutions & Upsell
For Acumatica