SALES STUDIO CONFIGURATION

ADD NEW 'IS MUTUALLY EXCLUSIVE GROUP' SALES PACKAGE

Sales Packages are a combination of items that can be added to a quote by adding the Sales Package as an 'item'. These packages or bundles give your customers an opportunity to choose your products and / or services grouped with their specific needs in mind. The ability to then add, remove or edit products from these packages can make the end result even more satisfying to your customer.

Checking a Sales Package as '**Is Mutually Exclusive group**' in Sales Studio, sets both the *Minimum Allowed* and *Maximum Allowed* fields to **1** with the effect that only a *single* line item in that particular Sales Package can be selected on the quote and selecting any 1 line will *deselect* other lines.

You can also link 'Is mutually exclusive group' packages to *other* Sales Packages. For example, a 'Basic Copier Sales Package' may include:

- the choice of 1 **Copier** (from a '*mutually exclusive*' group of 3 types of copier)
- the choice of 1 **Drum** (from a '*mutually exclusive*' group of 3 types of drum)
- the choice of 1 **Black Toner** (from a '*mutually exclusive*' group of 3 types of black toner)

In this instance **3** x '***Is mutually exclusive group***' packages would be set up:

i. A **Copier** package (with a selection of 3 ***copiers types*** to choose from)
ii. A **Drum** package (with a selection of 3 ***drum types*** to choose from)
iii. A **Toner** package (with a selection of 3 ***toner types*** to choose from)

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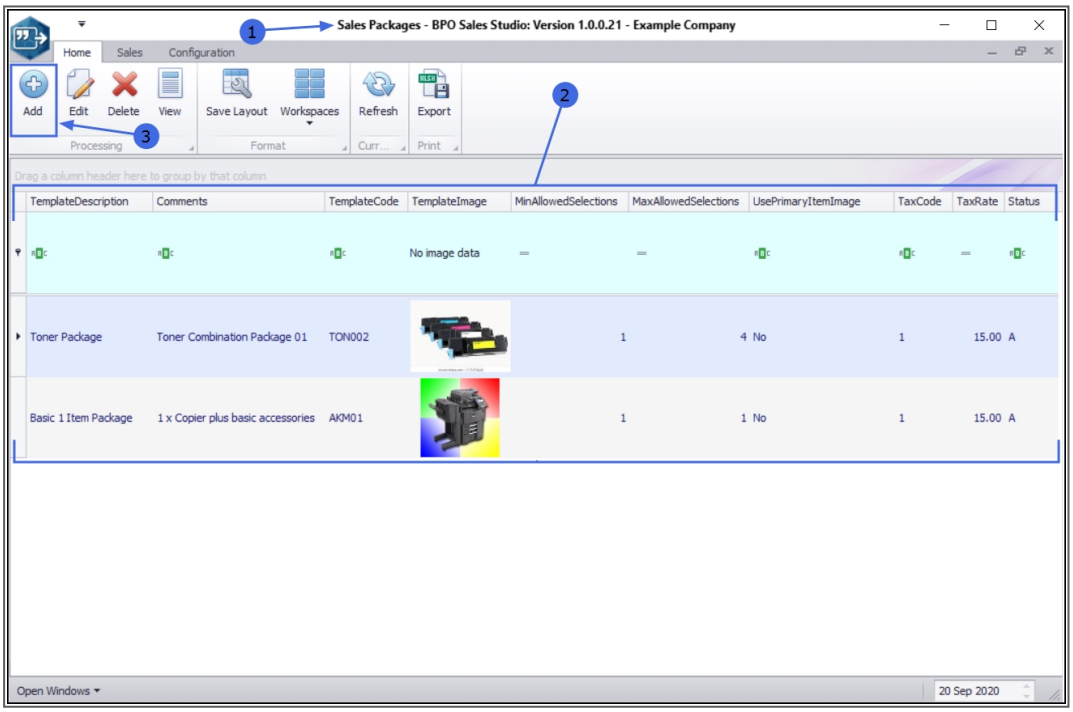
Note: Mutually exclusive groups do not allow mandatory items. You are able to select any 1 of the items from each package but only 1.

Note 2: 'Is mutually exclusive' Packages can be added to Min / Max Allowed Sales Packages, if required. (See Combination Packages)

Ribbon Access: *Sales Studio > Configuration > Sales Packages*

ADD NEW SALES PACKAGE

1. The ***Sales Packages*** listing screen will open.
2. Here you can view a list of all the current Sales Packages on the system.
3. Click on ***Add***.



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THE SALES PACKAGE MAINTENANCE SCREEN

1. The ***Sales Package Maintenance: Add a new product package*** screen will open.
2. You will note 3 ***Processing*** buttons:
    i. **Save**: When you have finished adding all the new package details, click here to save your changes.
    ii. **Save Copy**: This is covered is the linked Save Copy manual.
    iii. **Cancel**: Click here to cancel / remove any changes you have made in this screen. You will be ***prompted*** to confirm that you wish to discard the changes. Select '***Yes***' to return to the Sales Packages listing screen or '***No***' to remain in this screen to continue adding details.

ADD NEW SALES PACKAGE INFORMATION

In this example, we will begin by setting up the 'Is mutually exclusive group' ***Copier*** package

3. Start by adding the new Sales Package ***text*** information:
    - **Package Code**: Type in a code in for this new package.
    - **Description**: Type in a word description of the new package.
    - **Comments**: Type in a comment regarding this package with perhaps more information about what the package includes.
4. **Tax**: Click on the drop-down arrow and select from the list, the correct tax code for this package.
5. Link an image to this new package.

Note: All of the Package information fields (3,4 and 5)are mandatory fields[*].

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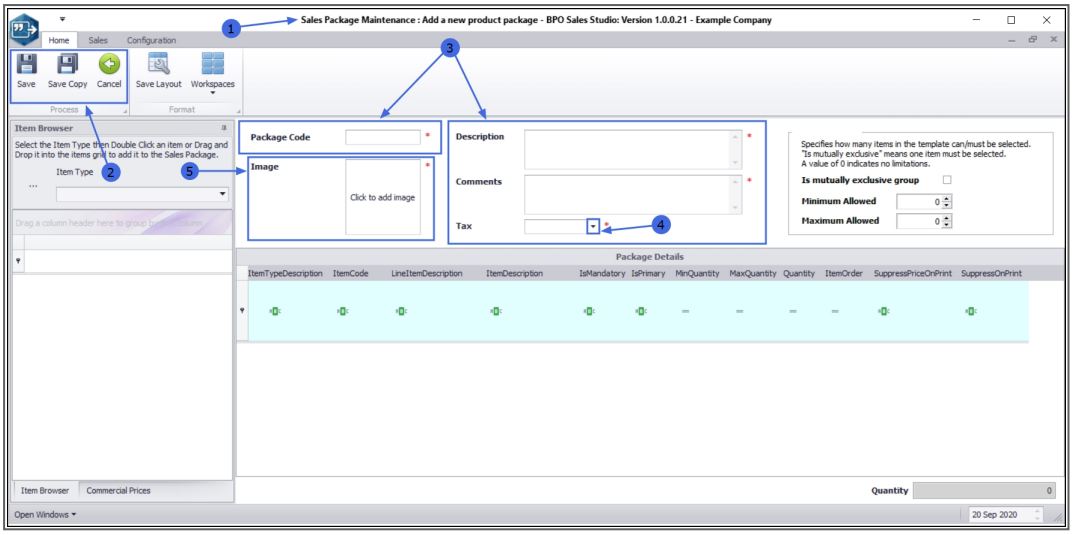

SELECT NEW SALES PACKAGE TYPE

1. Once you have entered the new package information,
2. Move across to the package ***type*** section.
3. Currently there are **2** package types:
    i. **Is mutually exclusive group**
    ii. **Min / Max Allowed**
4. In this example, we are setting up an '***Is mutually exclusive group***' copier package.
5. You will note that prior to this selection, both the ***Minimum*** and ***Maximum Allowed*** quantities are set to **0**.

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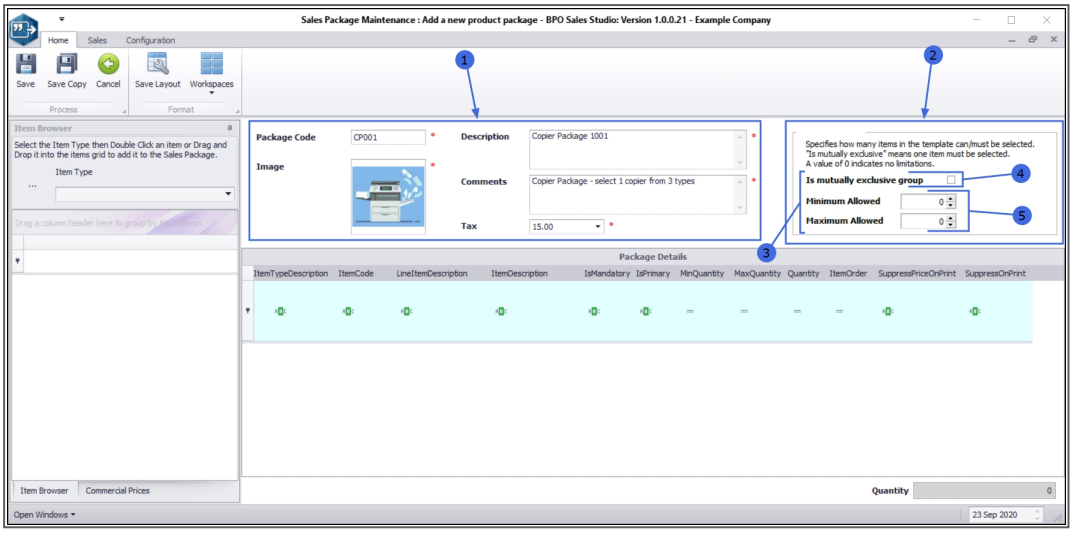
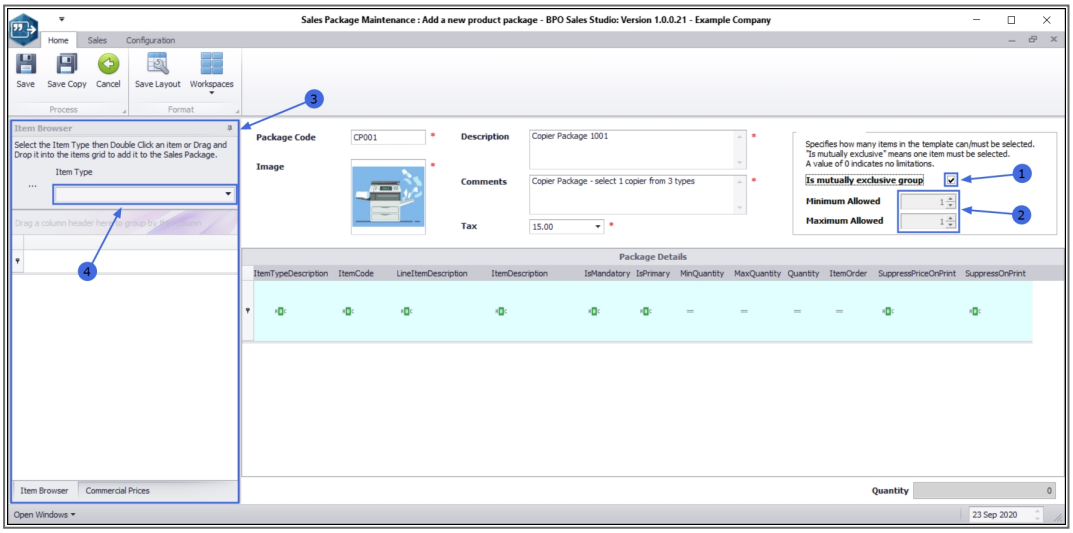


1. When the ***'Is mutually exclusive group'*** check box has been selected,
2. The ***Minimum*** and ***Maximum Allowed*** amounts will both be set to **1**. This is because only 1 item in a '***mutually exclusive***' package can be selected.

ADD ITEMS

3. Move across to the ***Item Browser*** frame and
4. Click anywhere in the ***Item Type*** field.



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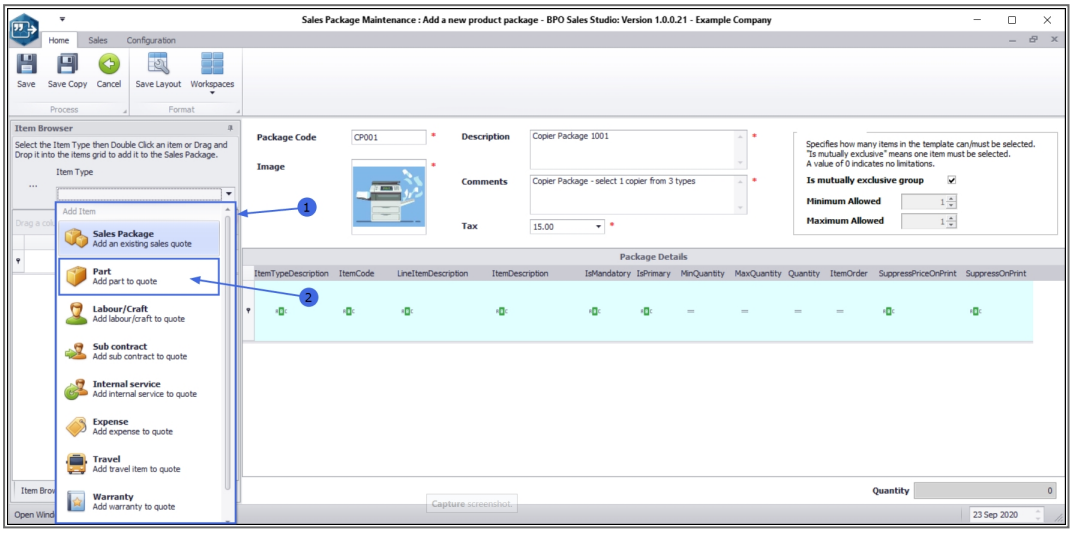
1. The ***Add Item*** menu will appear.
2. Select from the list, the ***Item Type*** that you wish to include in this package. As we are creating a copier type Sales Package, in this example, ***Part*** - *Add part to quote* is selected.



1. The ***Item Browser*** frame will *refresh* to display all the ***Parts*** available on the system.

   Note: You can use the Search Row to find the particular item you wish to include in this package.

2. Select the part you wish to link to this package.
3. Either ***drag and drop*** the part row to the ***Package Details*** data grid or ***double click*** on the row of the selected part.

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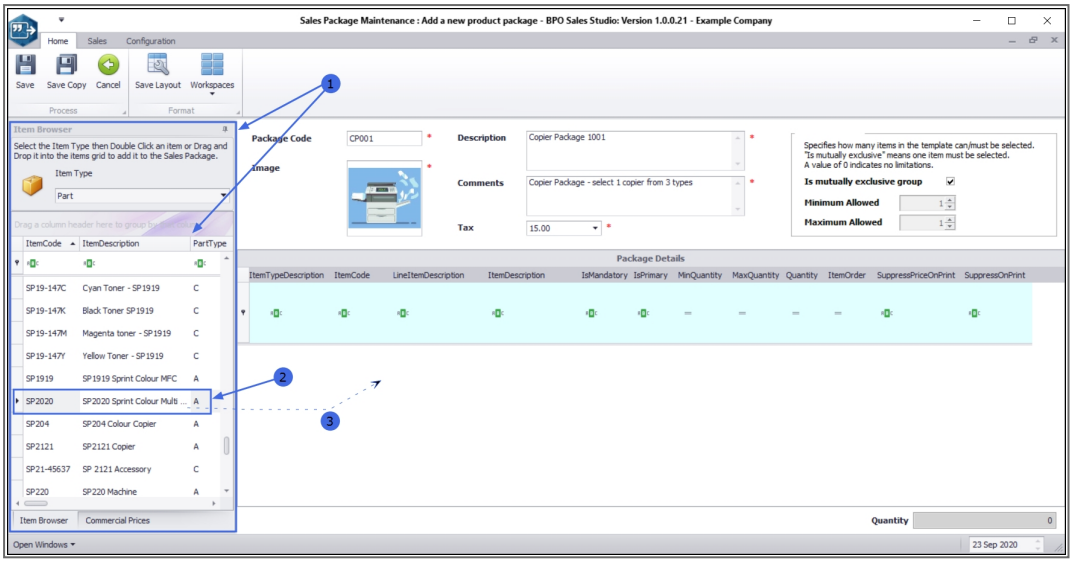

PACKAGE DETAILS

1. The ***Package Details*** data grid will now populate with the selected part details.
2. The columns explanations are as follows:
    i. **Item Type Description**: The type or group that this item belongs to e.g. Parts, Service, Warranty.
    ii. **Item Code**: The unique code for this item that is used across all BPO systems.
    iii. **Line Item Description**: The text description of the item. This field is editable.
    iv. **Item Description**: The text description of this item (uneditable).
    v. **Is Mandatory**: Select this check box if this item *cannot* be deselected on the quote. (Mutually exclusive groups *do not allow* mandatory items, so this field will not be applicable in this particular process.)
    vi. **Is Primary**: Select this check box if this item is the *primary* item in the Sales Package.

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vii. **Min Quantity**: Minimum number of this item that can be selected, 0 means no minimum. (see **Note***)

viii. **Max Quantity**: Maximum number of this item that can be selected, 0 means no maximum. (see **Note***)

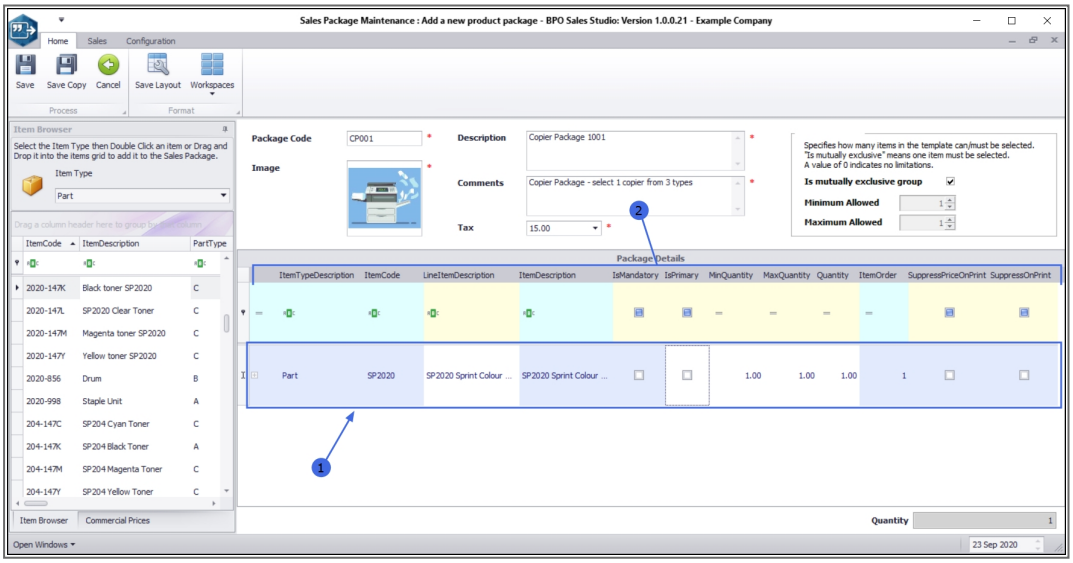
Note*: Checking a Sales Package as '***Is mutually exclusive group***' sets both the Minimum Allowed and Maximum Allowed to **1** with the effect that only a single line item in the Sales Package can be selected on the quote and selecting any line deselects the other lines, therefore you cannot have a Min / Max level set.

ix. **Quantity**: The default number of this item added to the quote.

x. **Item Order**: The order in which this item was selected and will appear on the quote. This can be edited using the Up and Down arrows in the first column of the row.

xi. **Suppress Price on Print**: Select to ensure this item will not be printed on the quote

xii. **Suppress On Print**: Select to ensure this item price will not be printed on the quote



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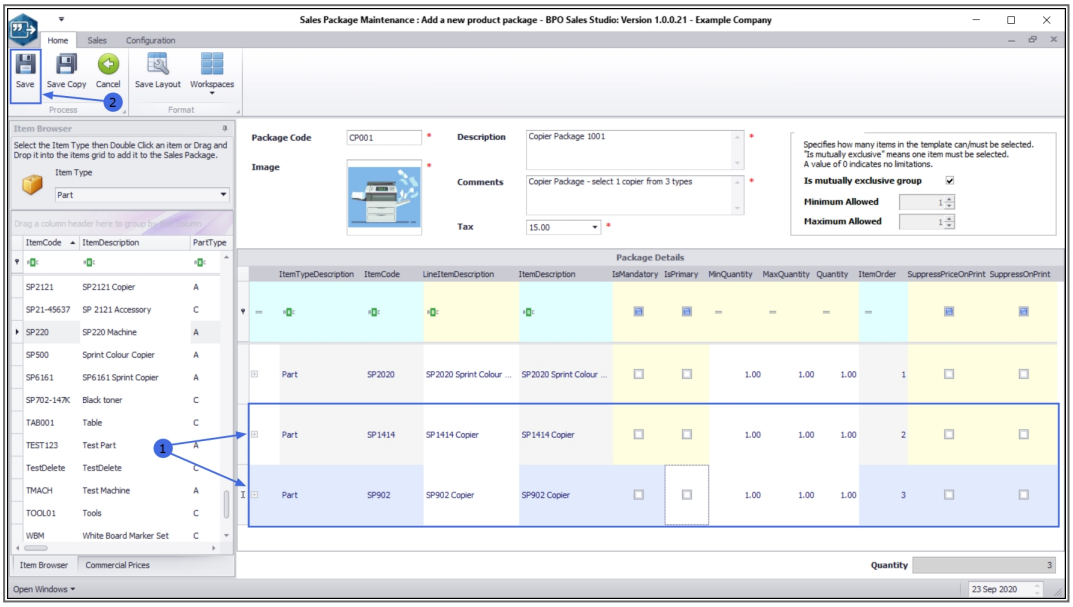
SAVE NEW SALES PACKAGE

1. Continue adding items, as required, using the process above. In this example, 2 more ***Copier*** items have been added to this Sales Package.
2. When you have finished adding items, click on ***Save***.



1. You will return to the ***Sales Packages*** listing screen.
2. The new Sales Package will be *added* to this list.
3. A ***Package Processing*** message box will pop up informing you;

   Sales Package saved successfully.
4. Click on ***OK***.

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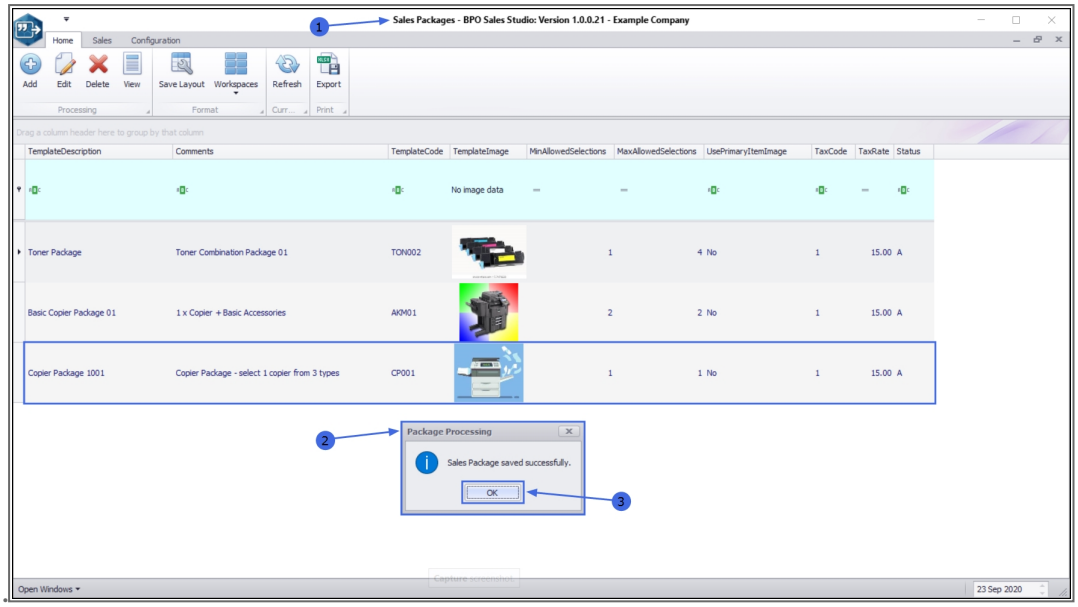

ADD DRUM AND TONER 'IS MUTUALLY EXCLUSIVE GROUP' PACKAGE

To complete the scenario as explained in the introduction. Two more 'mutually exclusive' packages will be added.

CREATE DRUM 'IS MUTUALLY EXCLUSIVE GROUP' PACKAGE

1. In this example, a ***Drum*** 'Is mutually exclusive group' Sales Package has been created.
2. **3** types of drums have been added to this package using the process described above.
3. The package has been ***saved***.

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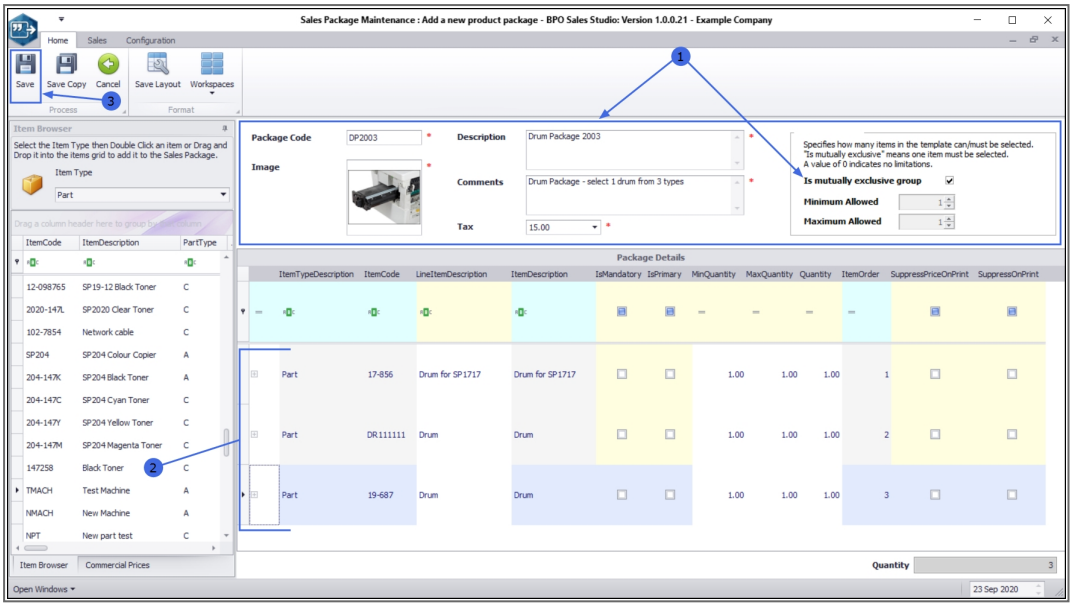
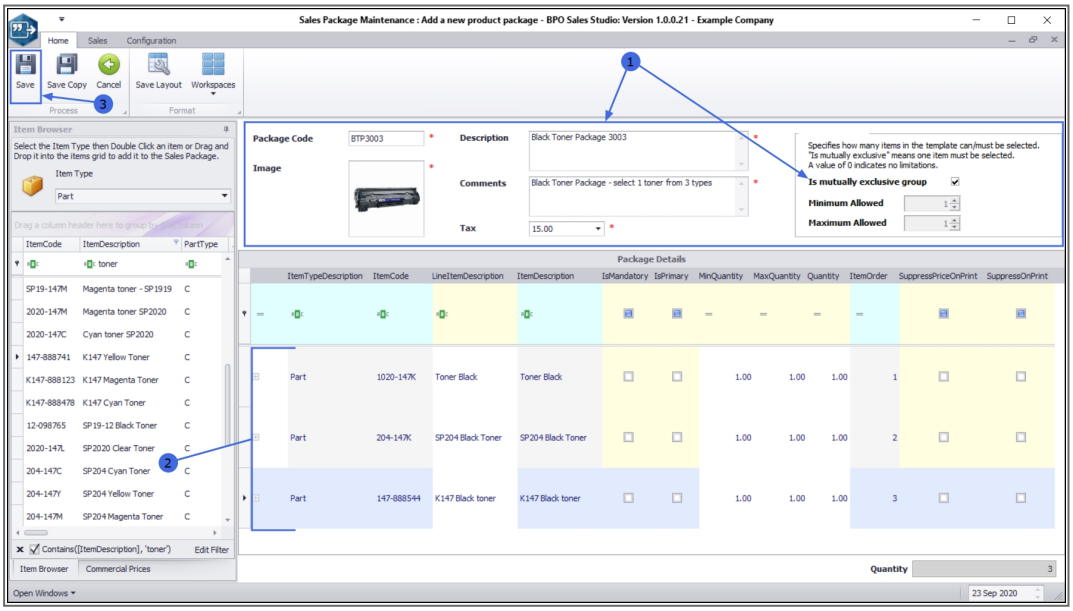


CREATE TONER 'IS MUTUALLY EXCLUSIVE GROUP' PACKAGE

1. In this example, a ***Toner*** 'Is mutually exclusive group' Sales Package has been created.
2. **3** types of toners have been added to this package using the process described above.
3. The package has been ***saved***.



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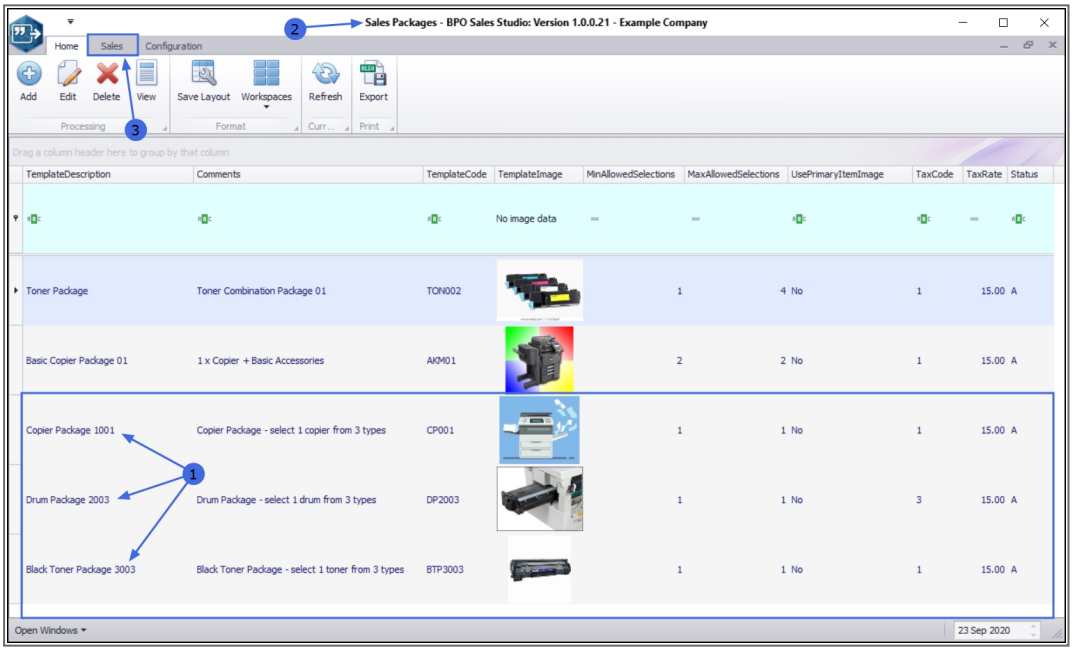
VIEW ALL 3 PACKAGES IN THE 'SALES PACKAGES' SCREEN

1. Once ***saved***, all **3** packages can now be viewed in the
2. ***Sales Packages*** listing screen.

VIEW ALL 3 PACKAGES IN THE 'ADD / EDIT QUOTE' SCREEN

To further explain how an 'Is mutually exclusive group' package works, you will need view these packages in either the ***Add*** or ***Edit Customer Quote*** screens.

3. Click on the ***Sales*** tab.



1. The screen will refresh to display the ***Quotes*** toolbar button. Click on this button.

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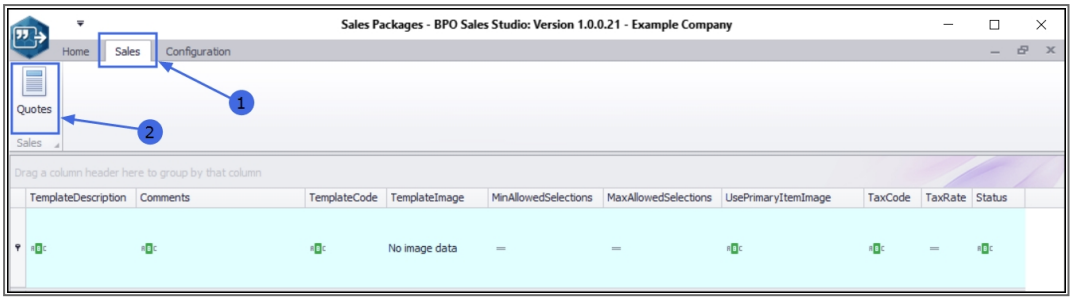
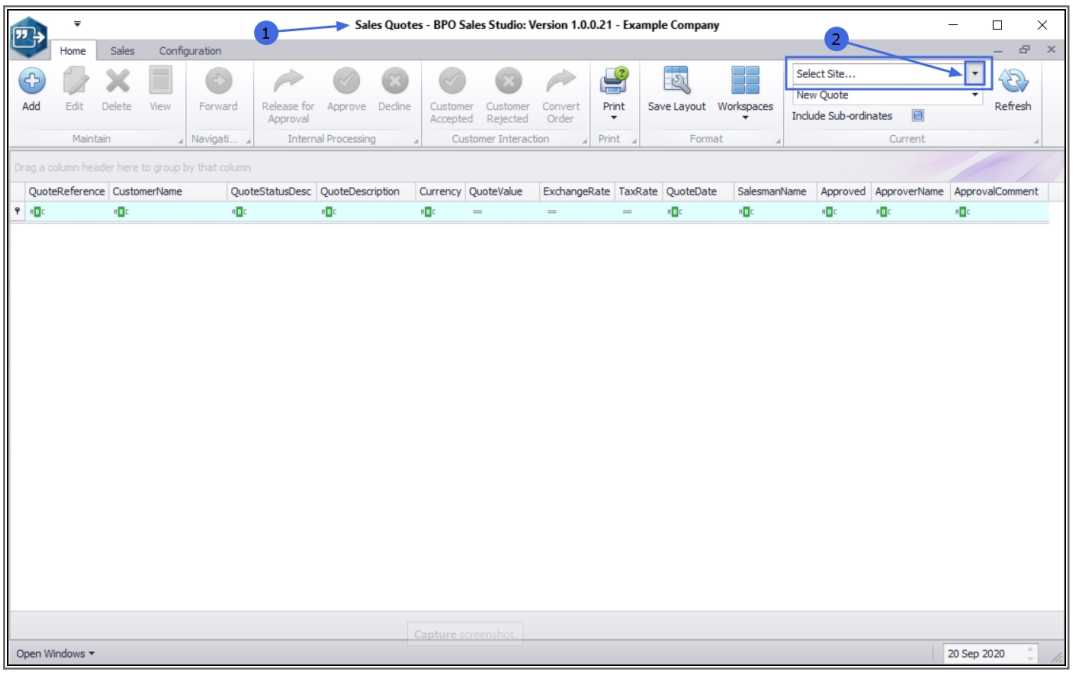


1. The ***Sales Quotes*** listing screen will open.
2. Click on the drop-down arrow in the ***Site*** field and select from the list, the relevant site.



1. All the quotes linked to the selected site will be displayed
2. Click on ***Add***.

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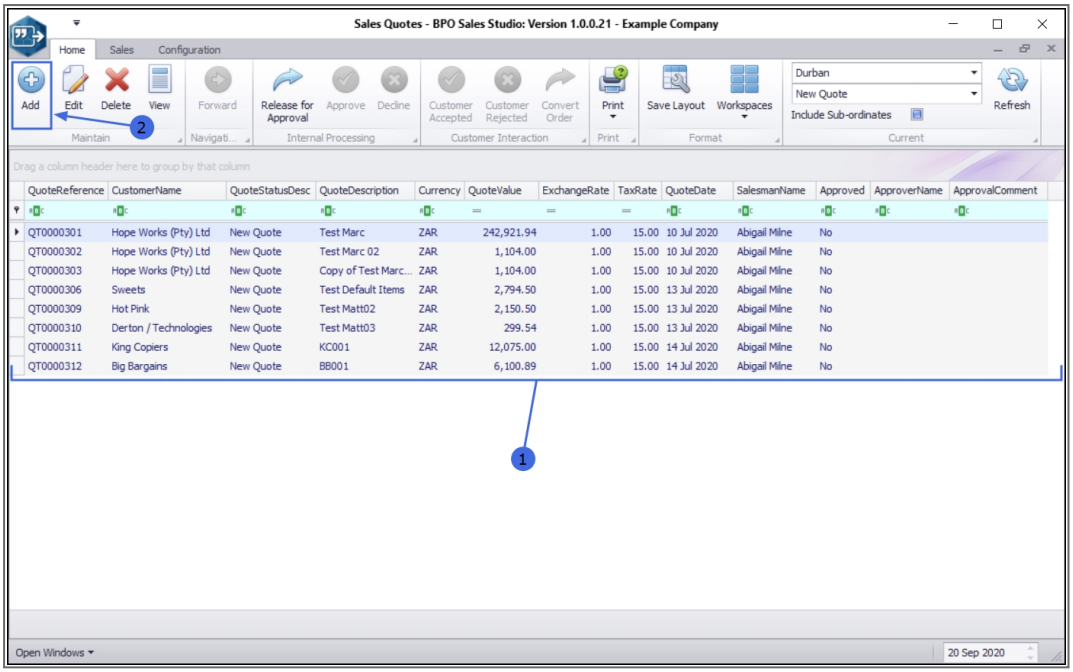
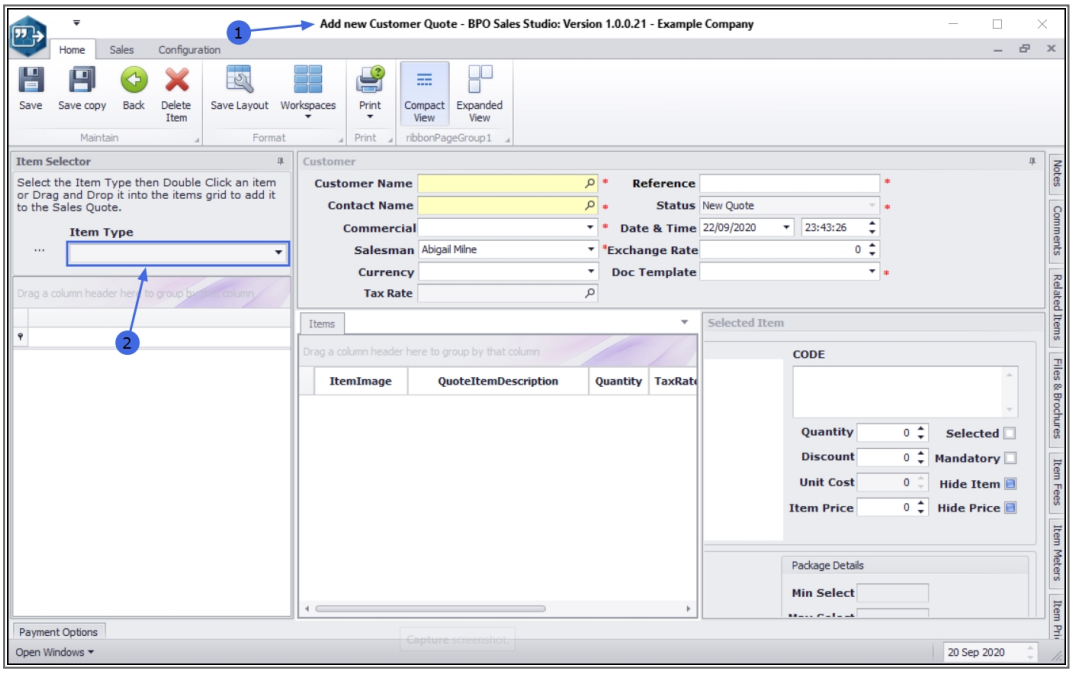


1. The ***Add new Customer Quote*** screen will open.
2. Click anywhere in the ***Item Type*** field.



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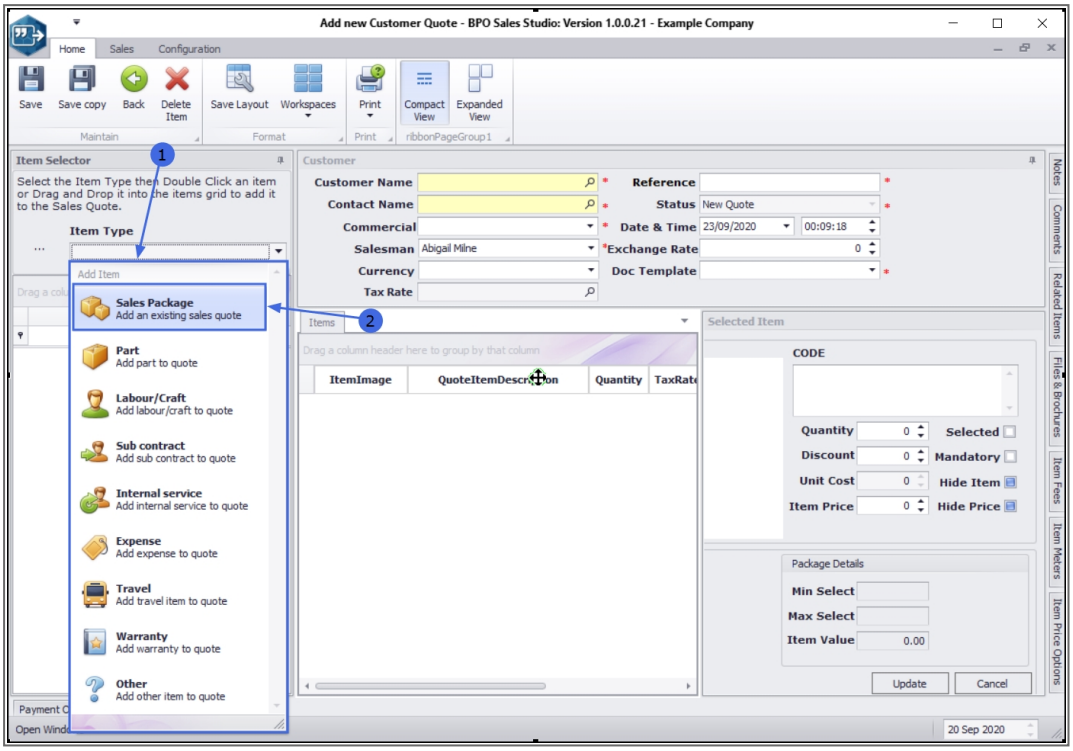
1. The ***Add Item*** menu will display.
2. Select ***Sales Package*** - *Add an Existing sales Quote* from the list.



1. You can now view the 3 new '*Is mutually exclusive group*' Sales Packages in the ***Item Selector*** frame.

   Note: Before you can add the packages to the quote and see how they work, you must select a Customer.

2. Click on the ***search*** icon in the ***Customer Name*** field.

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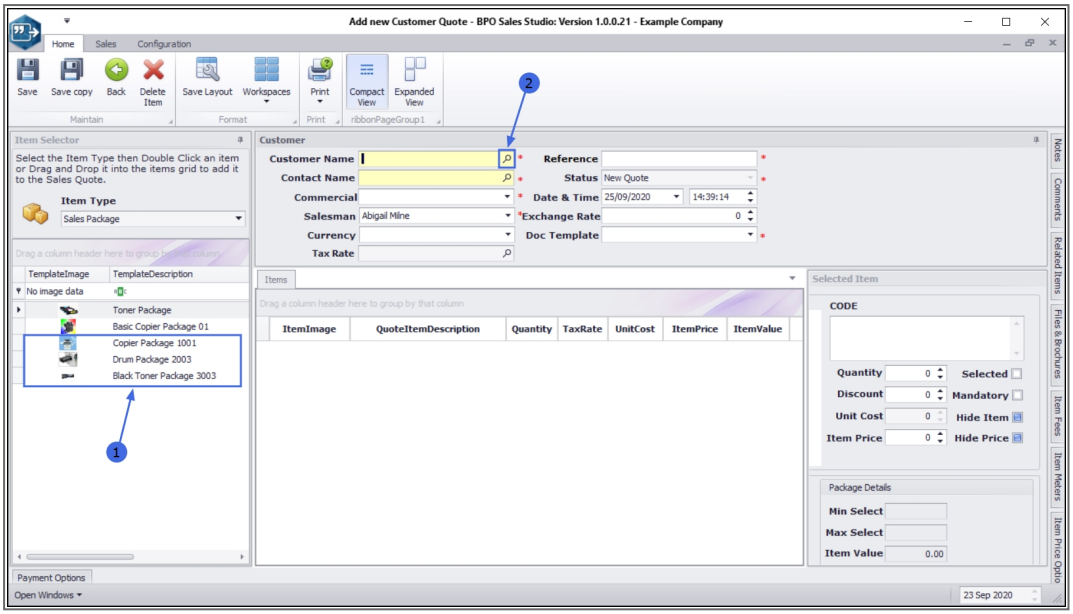
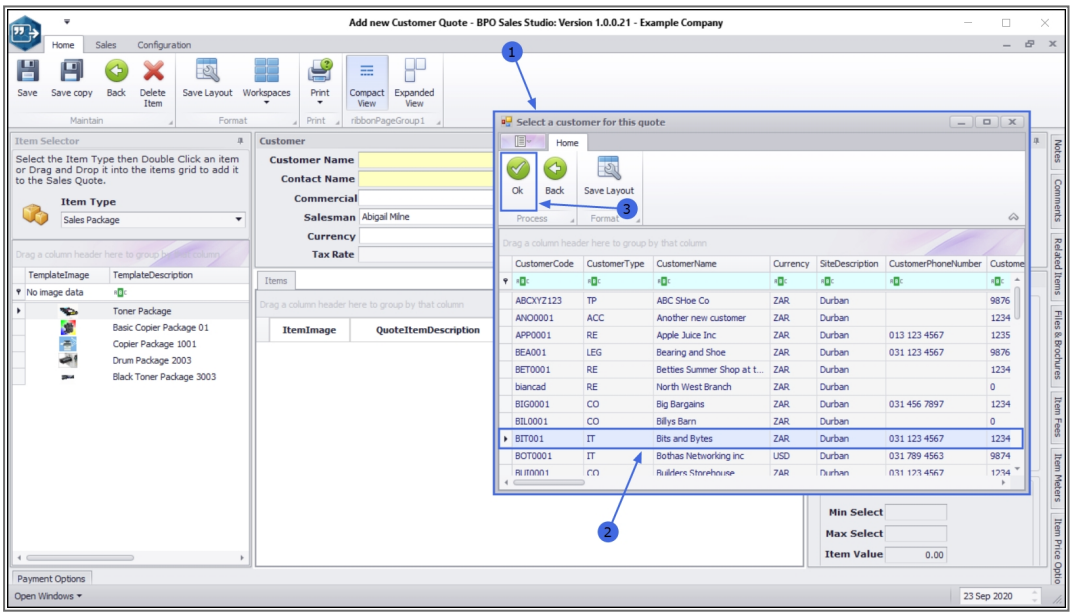


1. The ***Select a customer for this quote*** screen will pop up.
2. Click in the ***row*** of the selected customer.
3. Click on ***Ok***.



1. The selected customer details will populate the ***Customer*** frame.
2. You will note that the ***Items*** frame has also now auto populated with the Quote Default Items as set up in the linked manual.

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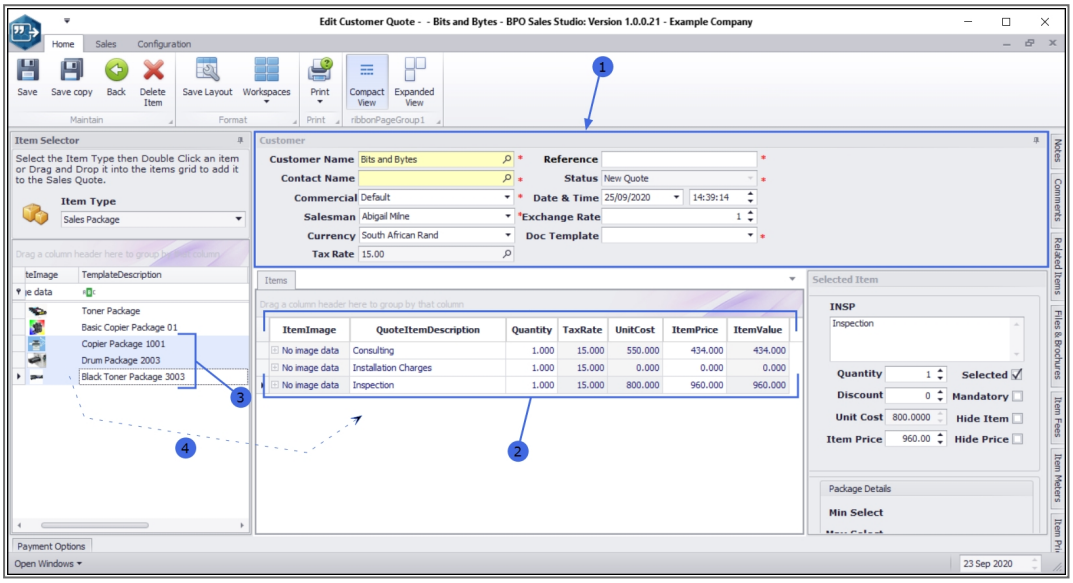
Now you can add the 3 new 'mutually exclusive' Sales Packages to this quote.

3. Either ***double click*** on each item row or use the ***Shift*** key and the ***Down Arrow*** on your keyboard to multi-select all 3 packages.
4. ***Drag*** and ***drop*** this multi selection into the ***Items*** frame.



1. All 3 packages can now be viewed in the ***Items*** frame.
2. Click on the each of the ***expand*** icons in front of the all 3 package rows.

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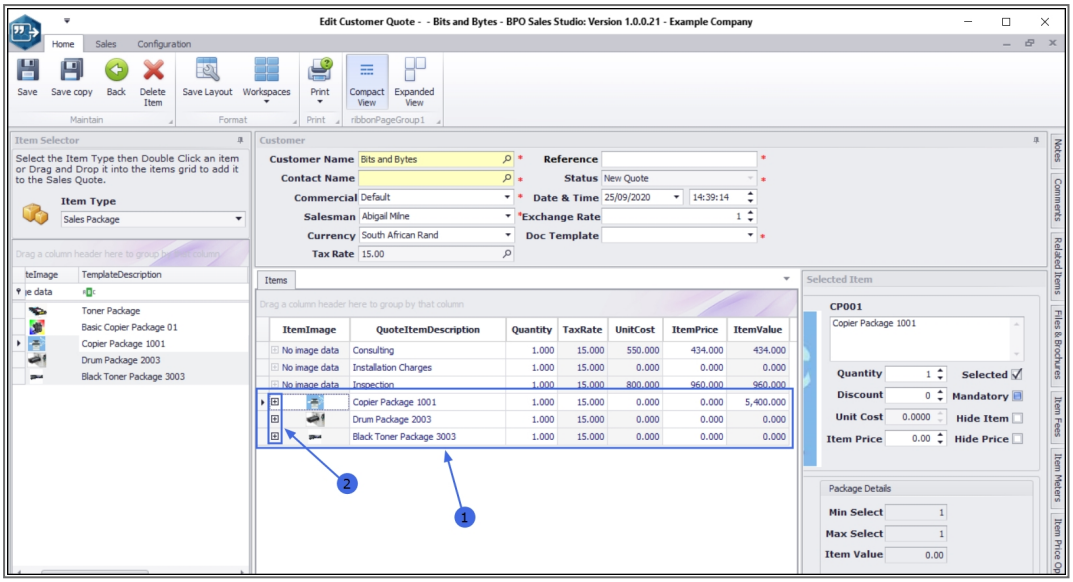
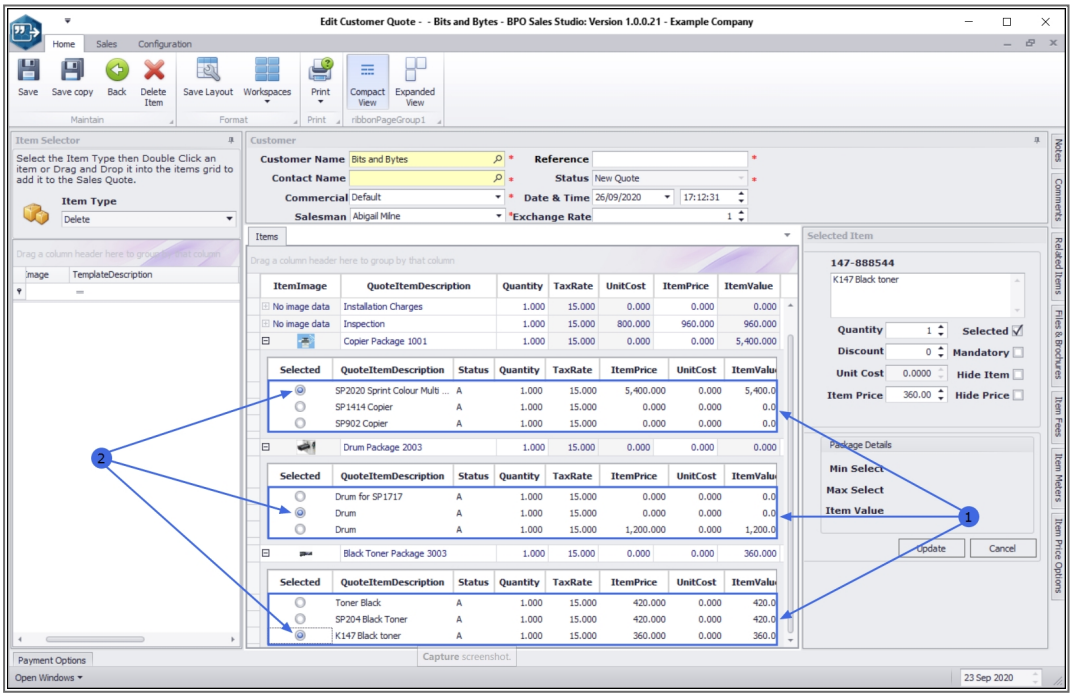


1. Each Sales Package row will expand to display all the items linked to each specific package.
2. Note that there is a ***Selected*** column in each package data grid, containing radio buttons. The system will not allow you to select more than **1** line in each package. The customer who receives this quote will have to choose between **1** Copier type, **1** Drum type and **1** Toner type.



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This differs from a '***Min / Max Allowed***' Sales Package where more than 1 item in the package can be selected. In the next manual we are going to set up a Min / Max Allowed Sales Package combined with a 'mutually exclusive' package so that the comparison between the 2 different package types can be examined.

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