SALES STUDIO CONFIGURATION

VIEW SALES PACKAGES

Creating a **Sales Package** (or bundle), allows you to specify a group of products to be added to your quote all at once. Adding this package or bundle to your quote can now be done with a single 'item' selection which will:

i. Save you **time**, as a Salesperson will often create quotes for the same group of products over and over.
ii. Save you having to manage to *manually remember* to add each product, each time a quote is created.
iii. Help you sell *more items* in one customer encounter,

With Sales Packages, you can specify which products / services are included in the package. You can then add that package to the quote and all the items that are linked to the package are automatically added to the quote. Using packages also ensures that you will never forget to include an item in the quote.

Customers appreciate the convenience of getting all the items they require as a single package. Enabling them to remove, add, or edit products from base packages can make the end result even more satisfying. This satisfaction can be further enhanced by offering discounts on packages through economies of scale - the total price is lower when your company products are purchased as a package.

Customer ***convenience*** and ***value*** is key when it comes to creating successful Sales Packages.

Follow the process below to ***view*** current Sales Packages already linked to the system.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

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

THE SALES PACKAGES SCREEN INTERFACE

1. The ***Sales Packages*** listing screen will open.
2. This screen contains a data grid of all the Sales Packages currently set up on the system.
3. There are **4** Processing buttons in this screen: **Add** (Is Mutually Exclusive Group or Min / Max Allowed), Edit, Delete, and ***View***.

GENERAL BPO2 INTERFACE

The following basic BPO2 interface functionality applies in this screen:

1. **Format**:
   - Save Layout
   - Workspaces
2. **Current**:
   - **Refresh**: Clicking on this button will update the currently displayed page.
3. **Print**:

- Export

4. **Open Windows**:
   - Open Windows
5. **Data Grids**:
   - Refer to Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.

VIEW LIST OF CURRENT SALES PACKAGES

1. The Sales Package records / templates have the following fields (columns). The field / column information is input when a Sales Package is added to the system:
   - **Template Code**: The unique sales package code.
   - **Template Description**: A brief text description of the Sales Package.
   - **Comments**: Comments or more information about the Sales Package.
   - **Template Image**: If there is an image linked to this Sales Package, it will display here.
   - **Min Allowed Selections**: The minimum quantity of the selected item allowed in this package, or the minimum quantity of this item that must be ordered by a customer. (This minimum will only apply if the '***Is mutually exclusive group***' check box is not ticked, otherwise this field will initially be set to '**0**'.)
   - **Max Allowed Selections**: The maximum quantity of the selected item allowed in this package, or the maximum quantity of this item that must be ordered by a customer. (This maximum will only

apply if the '***Is mutually exclusive group***' check box is not ticked, otherwise this field will initially be set to '**0**'.)

- **Use Primary Item Image**: If each item added to the Sales Package has an image, selecting this check box will ensure that the ***primary*** item's image will be used as the Sales Package image e.g. if the package includes a copier - as well as a drum and a toner- which fit to the copier, the copier will usually be the primary image.
- **Tax Code**: The Tax Code that is linked to this Sales Package on the system.
- **Status:** A - Active = the Sales Package is currently in use. I - Inactive = this Sales Package is no longer available.
- **Date Change:** The Date the Sales Package was edited, if applicable. *(This column may be hidden in your data grid.)*
- **Change User:** The User that edited the Sales Package, if applicable. *(This column may be hidden in your data grid.)*

VIEW SELECTED SALES PACKAGE

1. Select the ***row*** of a particular Sales Package.
2. Click on ***View***.

1. The ***View Sales Package*** screen will open. The ***Description*** of this Sales Package will be in the ***Title Bar***.
2. You will note that the ***Process*** buttons have changed. There is no Save button as you cannot edit the Sales Package in this screen (it is a *View only* screen) but there is an 'active' Save Copy button and a Cancel button which are covered in the linked manuals.

3. The Sales Package ***information*** frame contains mandatory fields relating to the Sales Package:
   i. **Package Code**
   ii. **Description**
   iii. **Image**
   iv. **Comments**
   v. **Tax**

   explanations for these are covered in image **4** above.
4. The Sales Package ***type*** frame informs you as to which type of Sales Package this is. At the time of publishing, there are 2 types of packages:

   i. 'Is Mutually Exclusive Group' and
   ii. 'Min / Max Allowed'

   For more information, please refer to the linked manuals.
5. The ***Package Details*** frame lists all the ***items*** linked to the selected Sales Package.
6. The ***Item Browser*** frame will come into play if you are going to create and save a copy of this quote.
7. ***Close*** the screen (or click on ***Cancel***) when you have finished viewing the selected Sales Package. You will return to the ***Sales Packages*** listing screen.

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