We are currently updating our site; thank you for your patience.

SALES STUDIO CONFIGURATION

ADD NEW 'MIN / MAX ALLOWED' 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.

Creating a '**Min / Max Allowed**' Sales Package in Sales Studio, allows you to set those respective figures with the effect that a customer can select (buy) <u>more than **1**</u> of an item in that particular Sales Package. This can create an advantage to both your company and your customer:

Company Advantage: Increased revenue and average sales. Packages help to increase average order value. Product packages can also speed up inventory clearance: you can package quantities of a 'dead' item at a reduced price. You can pair top selling products with less popular items. Tailored recommendations direct clients toward choices that meet their needs. This convenient tactic relieves customer decision exhaustion and helps you close your sale.

Customer Advantage: Your customer can save money by placing a bigger order at a discount price. This can be implemented by including a minimum spend threshold, over which a discount or tiered discount kicks in. This typically increases the order quantity on future sales as well.

A **Min / Max Allowed** package also enables you to select a '**Mandatory item**' within the package. These are products which cannot be sold as 'stand alone' items.
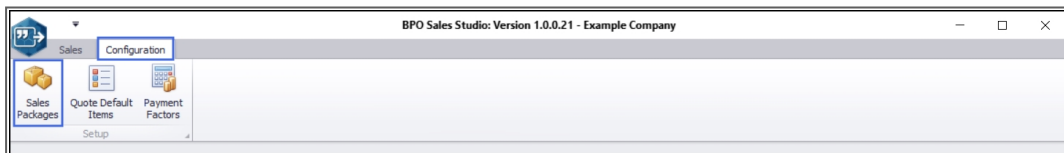
For example, a Copier Package may be created whereby you can select more than one copier, drum and toner. The copier and drum are compulsory (mandatory) items but toners can be added only if required.

A customer will need to select how many (Min / Max) of the Copier Package is required - the main product - but also has the choice to add zero or more 'optional' products such as toners.

Note 1: Any Item Types may be considered a '**Mandatory item**' e.g. Warranty, Labour, Internal Service, Travel, for example.
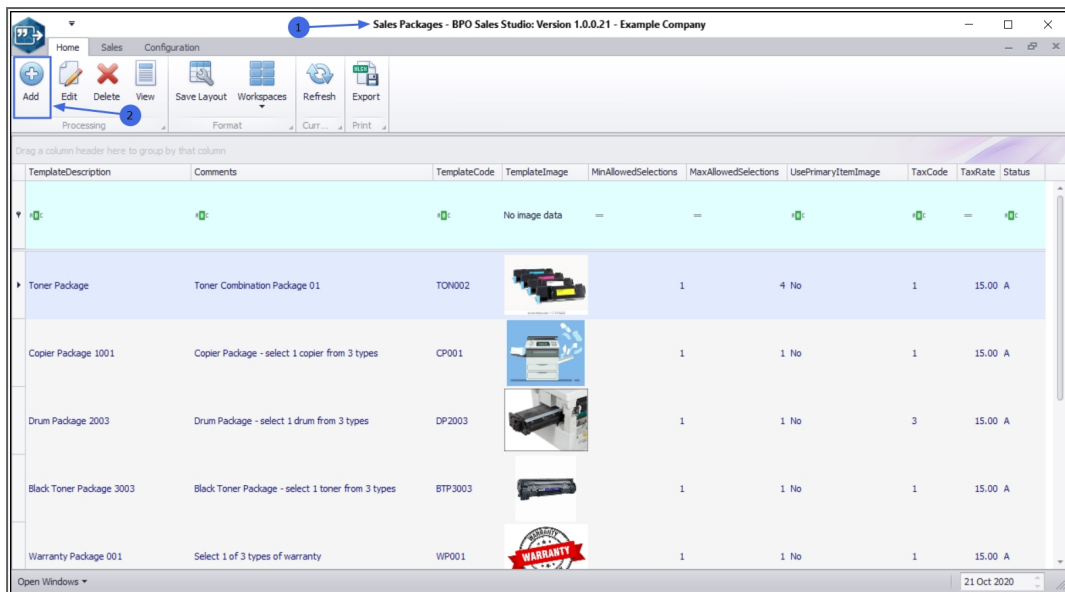
Note 2: '<u>Is mutually exclusive</u>' Packages containing items such as Warranties can also be added to this package available for selection on this Min / Max quote, if required. (See <u>Combination Packages</u>)

Ribbon Access: Sales Studio > Configuration > Sales Packages

ADD NEW SALES PACKAGE

1. The **Sales Packages** listing screen will be displayed.
2. Here you can view a list of all the <u>current</u> Sales Packages on the system.
3. Click on **Add**.
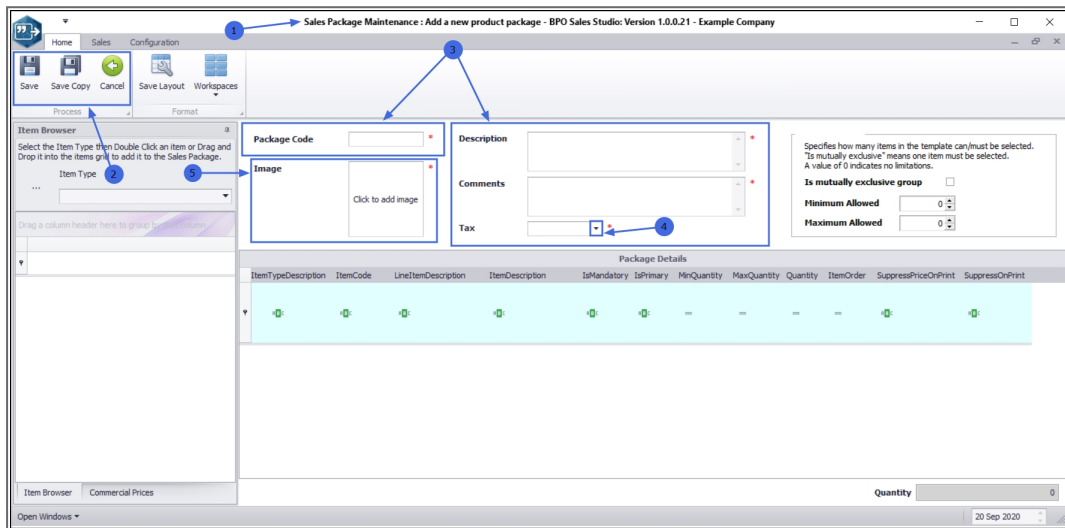
THE SALES PACKAGE MAINTENANCE SCREEN

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.
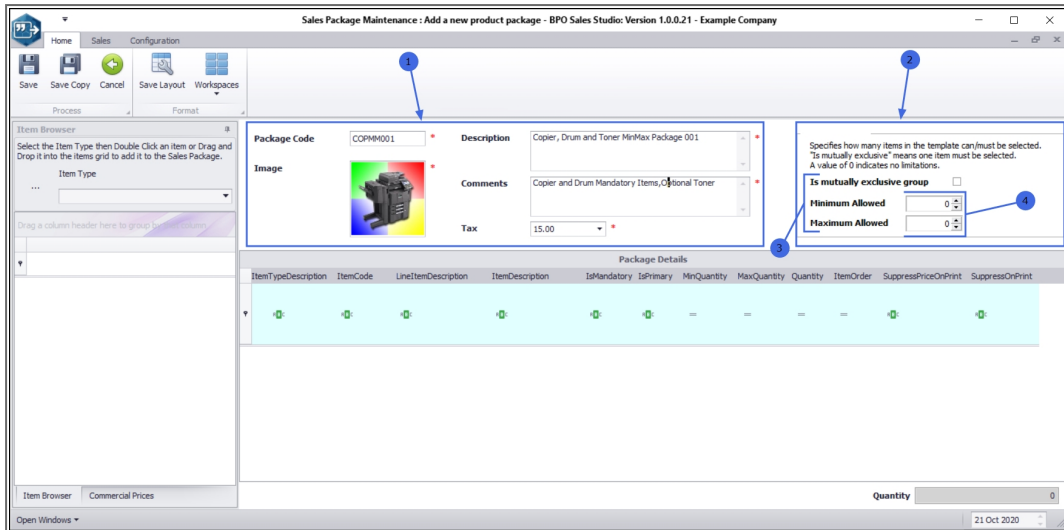
ADD NEW SALES PACKAGE INFORMATION

3. Start by adding the new Min / Max 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. <u>Link an image</u> to this new package.

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

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, as we are setting up a '**Min / Max Allowed**' copier package, you are able to set the Minimum and Maximum amounts. Leaving the fields as **0** means that means <u>no</u> minimum or maximum is required.
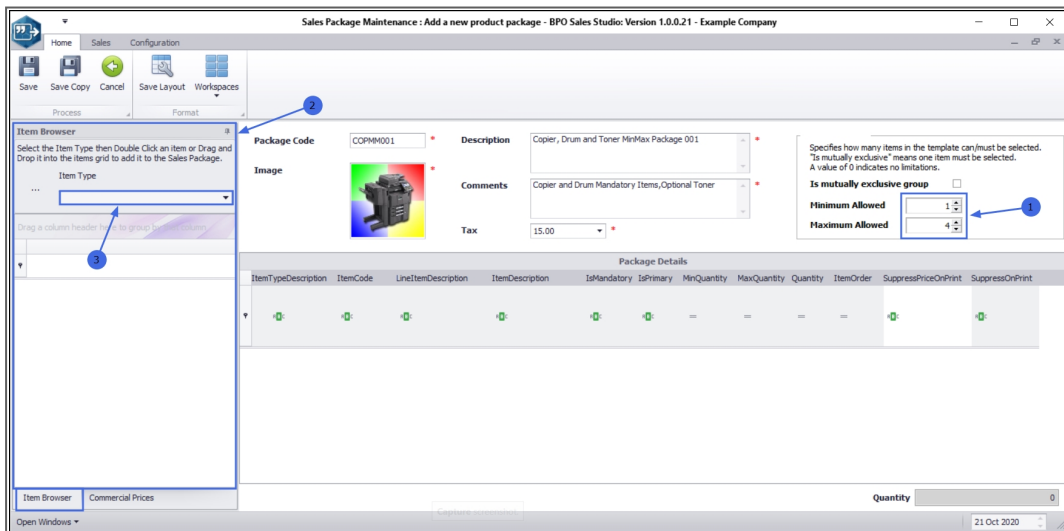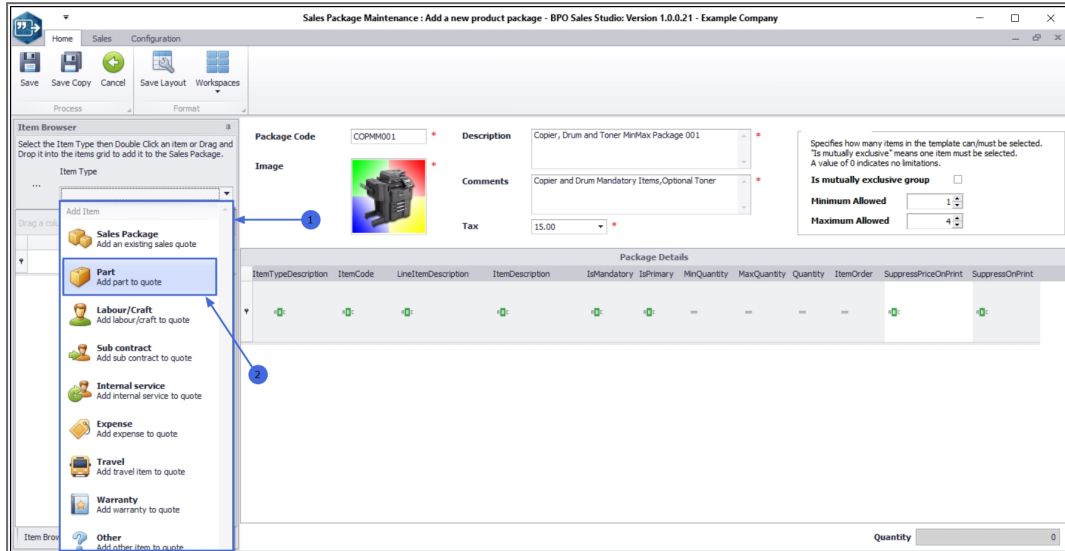
SELECT MIN / MAX AMOUNTS

1. In this example, the Minimum Allowed amount is set to **1** and the Maximum is set to **4**.
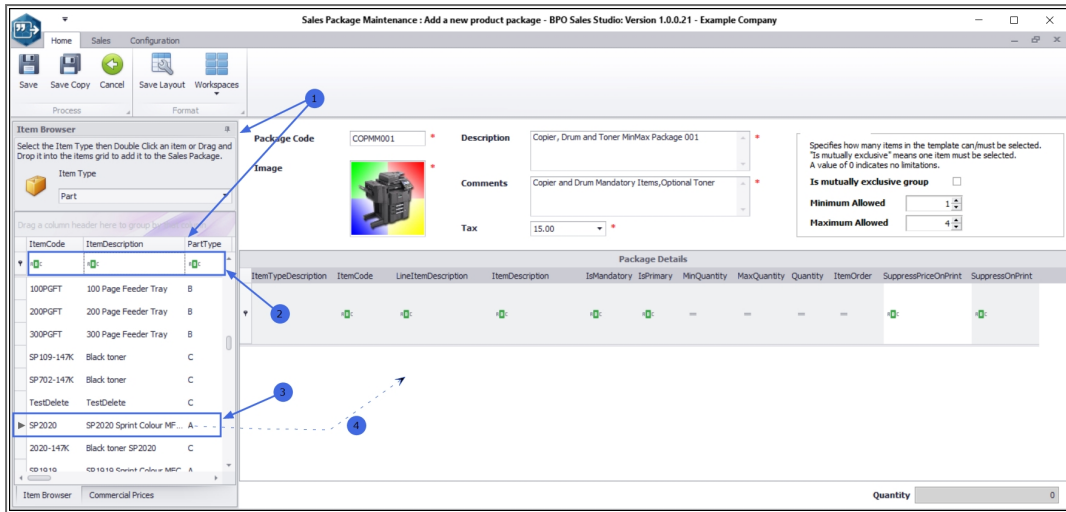
ADD ITEMS

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

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.
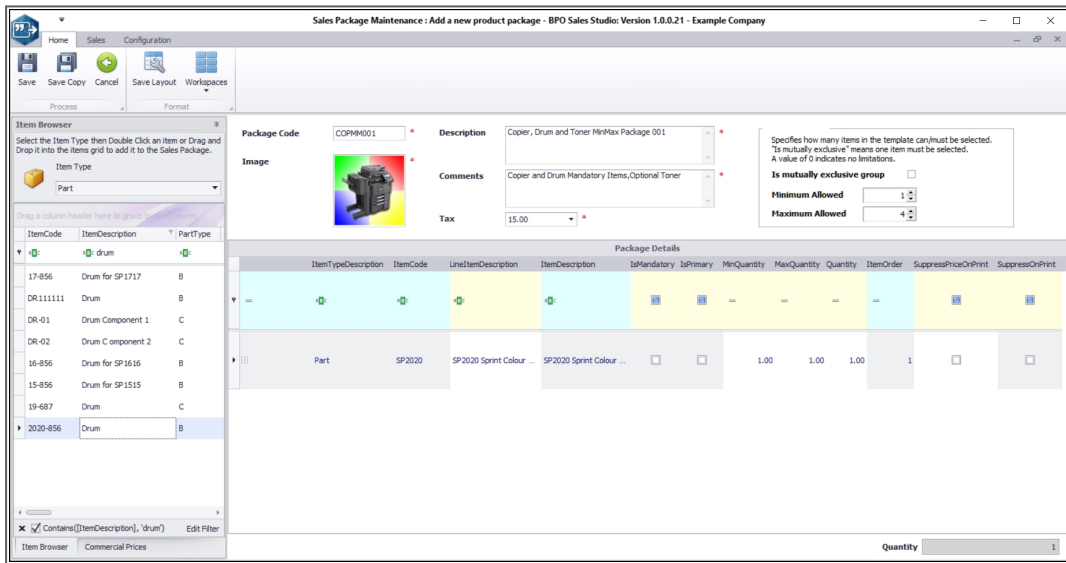

1. The **Item Browser** frame will refresh to display all the **Parts** available on the system.
2. You can use the **Search Row** to find the particular item you wish to include in this package.
3. Select the part.
4. Either **drag and drop** the part row to the **Package Details** data grid or **double click** on the row of the selected part.

HEADING C

1. Text
2. Text

UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.

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