



RESOLV CROSS SELL

USER MANUAL

Version 10.0

**PRESENTED BY
VISTAVU SOLUTIONS**



SAP[®] Certified
SAP Business One Integration

© Copyright VistaVu Solutions

These materials are subject to change without notice. These materials are provided by VistaVu Solutions for informational purposes only, without representation or warranty of any kind, and VistaVu Solutions shall not be liable for errors or omissions with respect to the materials.

The use and copying of this document and the associated computer software are subject to VistaVu Solutions customer registration agreement. Any other use is prohibited.

Resolv is a trademark of VistaVu Solutions.

SAP Business One is a trademark of SAP AG.

All other trademark or service marks are the property of their respective owners.

Resolv Cross Sell is part of the Resolv Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

SAP[®] Certified
SAP Business One Integration

**RESOLV CROSS SELL
USER GUIDE**

Table of Contents

Cross Sell 4

Setup..... 4

 Cross Sell Configuration 4

 Customer Groups - Setup 3

 Cross Sell Item – Definition..... 4

 Header 5

 Cross Sell Items Grid 7

Process 8

Cross Sell

When selling your products, there may be additional products that go along with them that you want to offer and sell as well. **Resolv Cross Sell** gives you the ability to choose from a list of additional products to add to your marketing documents related to the items you enter in.

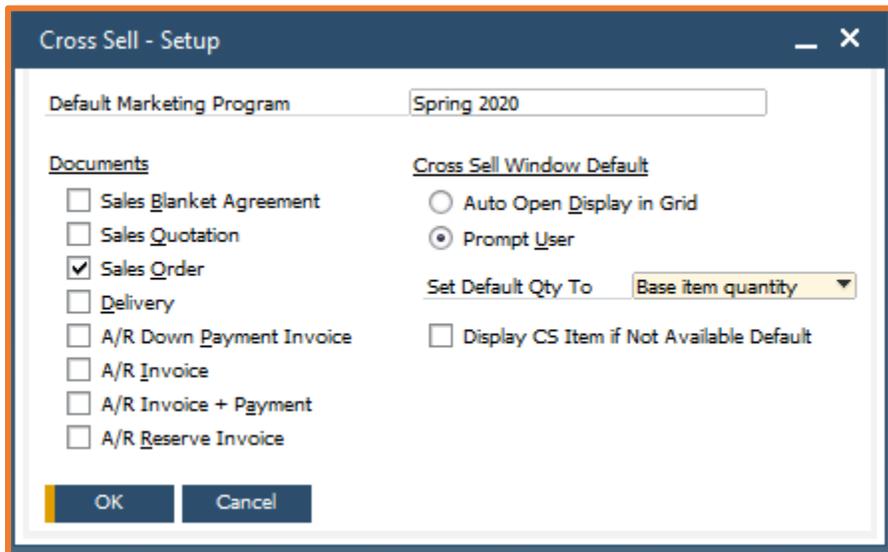
Setup

There are only a few setup screens for Cross Sell.

Cross Sell Configuration

(Administration > Resolv Setup > Resolv Cross Sell > CS Configuration)

This screen has all the default settings for when you create a Cross Sell record for your items, and also has one overall system setting.



The screenshot shows a dialog box titled "Cross Sell - Setup" with a close button (X) in the top right corner. The dialog contains the following settings:

- Default Marketing Program:** Spring 2020
- Documents:**
 - Sales Blanket Agreement
 - Sales Quotation
 - Sales Order
 - Delivery
 - A/R Down Payment Invoice
 - A/R Invoice
 - A/R Invoice + Payment
 - A/R Reserve Invoice
- Cross Sell Window Default:**
 - Auto Open Display in Grid
 - Prompt User
 - Set Default Qty To:** Base item quantity (dropdown menu)
 - Display CS Item if Not Available Default

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Default Marketing Program: The Marketing Program field gives you the ability to categorize your Cross Sell promotions so you can keep track of them better. The setting here in this screen is default for new Cross Sell records but can be individually changed per item. This field is not required.

Documents: Select which documents that Cross Sell should be active in. The setting in this screen is the default for new Cross Sell records but can be individually changed per item.

Cross Sell Window Default Presentation: This is a system wide setting for all Cross Sell records. It will determine how the Cross Sell screen will be presented to users when they enter in an item with a Cross Sell record. *Auto Open Display in Grid* will automatically open the Cross Sell screen when an appropriate item is entered; *Prompt User* will give the user a message asking if they would like to open the Cross Sell screen when an appropriate item is entered.

Set Default Qty To: Select the quantity that will be defaulted for the additional items when the Cross Sell screen opens. Select *1* for each item to default in a quantity of 1; select *Base item quantity* for each item to default in the same quantity as the base item. The setting here in this screen is default for new Cross Sell records but can be individually changed per item.

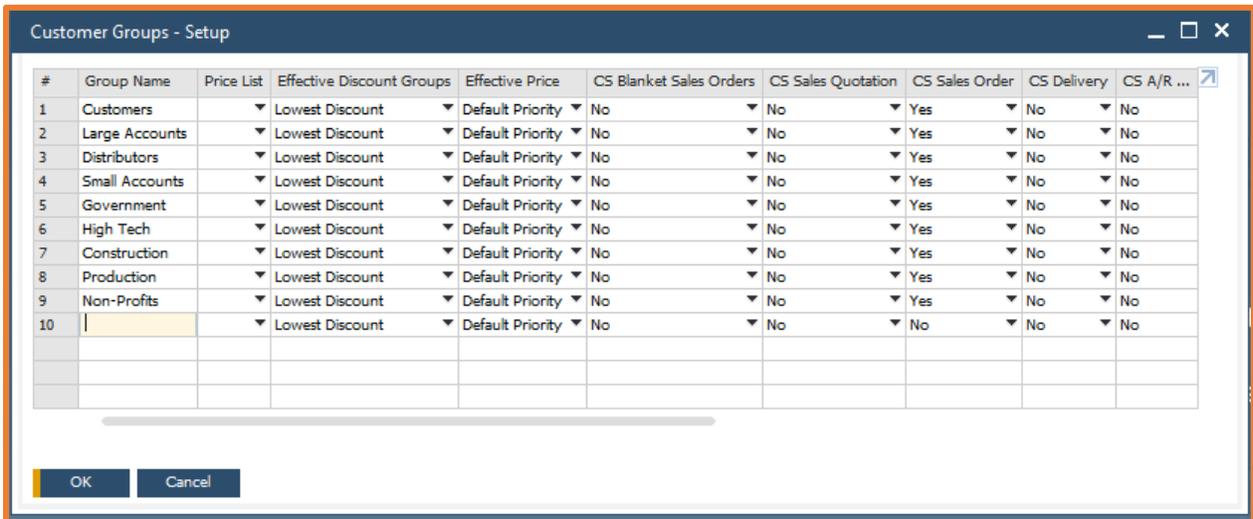
Display Cross Sell Item If Not Available: Check this box if you would like the additional Cross Sell items to be displayed even when there are 0 available. The setting here in this screen is default for new Cross Sell records but can be individually changed per item.

Customer Groups - Setup

(Administration > Setup > Business Partners > Customer Groups)

There are also some setup options for Cross Sell in the standard SAP Customer Group screen. Here you will be able to specify which Customer Groups should be prompted with Cross Sell in which documents. If a customer is not in a group that has the appropriate document allowed, then the user will not be prompted with the Cross Sell option when that customer is entered.

Just check off the boxes of the documents for each customer group that you want to use Cross Sell for and hit Update. If you do not check any boxes in this setup then the Cross Sell screen will never appear. These settings can be changed at any time.



#	Group Name	Price List	Effective Discount Groups	Effective Price	CS Blanket Sales Orders	CS Sales Quotation	CS Sales Order	CS Delivery	CS A/R ...
1	Customers	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
2	Large Accounts	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
3	Distributors	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
4	Small Accounts	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
5	Government	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
6	High Tech	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
7	Construction	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
8	Production	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
9	Non-Profits	▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	Yes ▼	No ▼	No ▼
10		▼	Lowest Discount ▼	Default Priority ▼	No ▼	No ▼	No ▼	No ▼	No ▼

Cross Sell Item – Definition

(Resolv > Resolv Cross Sell > Cross Sell Item – Definition)

The Cross Sell Item – Definition screen is where you will setup the individual Cross Sell records per item. In here you will choose things like valid date ranges, the items that will be available to add, etc.

The screenshot shows the 'Item Master Data' window with the following details:

- Item No.:** Manual A00001
- Description:** IBM Infoprint 1312
- Item Type:** Items
- Item Group:** IBM Printers
- UoM Group:** Manual
- Price List:** Base Price
- Unit Price:** Primary Curri 400.00 \$
- Checkboxes:**
 - Inventory Item
 - Sales Item
 - Purchase Item
 - Is Quality Check Required ?
- General Tab:**
 - Tax Liabale
 - Do Not Apply Discount Groups
 - Manufacturer:** IBM
 - Additional Identifier:** [Empty]
 - Shipping Type:** Fedex EM
 - Serial and Batch Numbers:** [Empty]
 - Manage Item by:** None
 - Active:** Active, Inactive, Advanced
 - From:** [Empty] **To:** [Empty]
 - View OTC** button
- Context Menu (Right-click):**
 - Remove
 - Duplicate
 - Related Message History
 - Cross Sell Definition** (highlighted with an orange box)
 - New Activity
 - Business Partner Catalog Numbers
 - Bill of Materials
 - Alternative Items
 - Related Activities
 - Inventory Posting List
 - Inventory Audit Report
 - Bin Location Content List
 - Items List
 - Inventory Status
 - Create Purchase Quotation
 - Purchase Quotation Comparison Report
 - Purchase Request Report
 - Available-to-Promise
 - Relationship Map...

Header

Base Item: Enter the Item Code that when entered in a document, will prompt for this Cross Sell information.

Base Item Name: This read-only field will display the base item description.

Cross Sell ID Description: You can give this Cross Sell definition an ID description if you choose.

Marketing Program: This field will be defaulted in with the information we setup in the Cross Sell Configuration screen we saw earlier, but you can enter in what you want per record.

Read Back Memo: The information entered into this screen will be displayed on the Cross Sell pop up screen and is intended for the user to read to the customer to entice them to purchase the additional items.

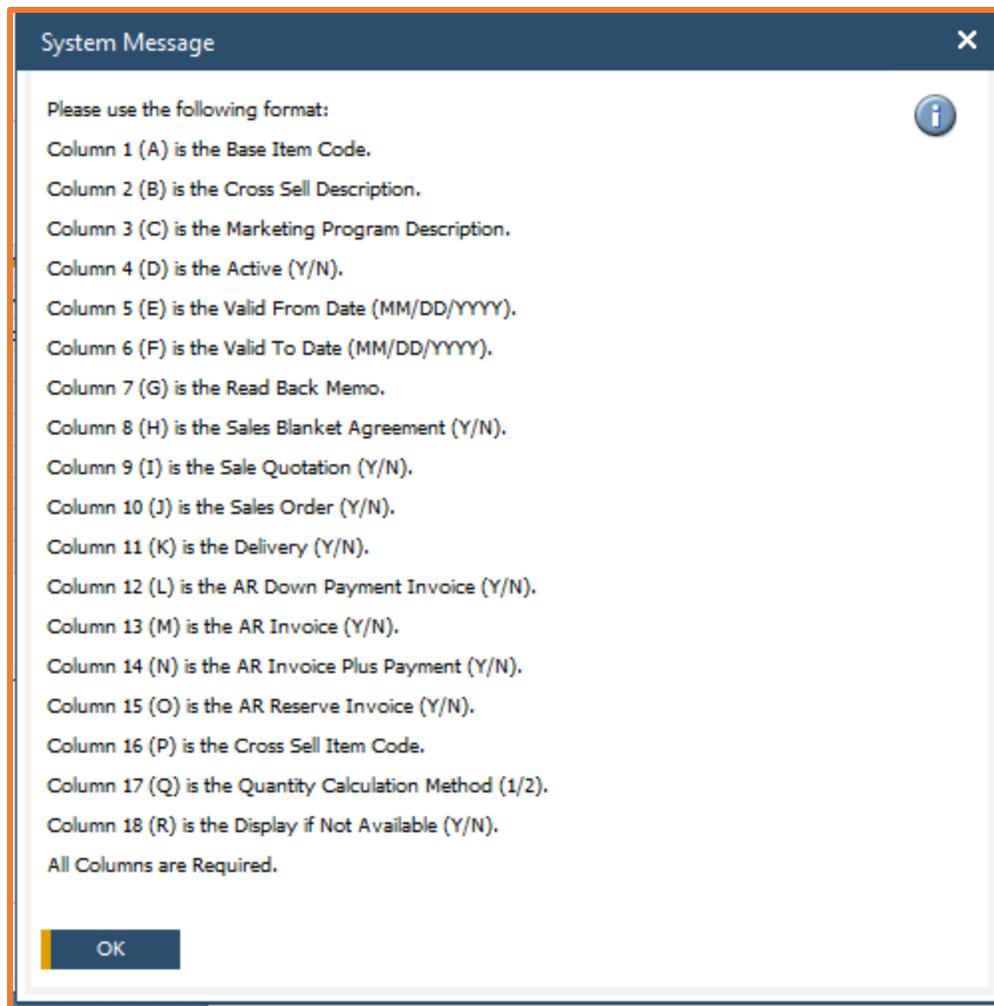
Active: Depending on whether you want this Cross Sell setup to be active or not you can either check or uncheck this box.

Cross Sell ID: This will be assigned by the system.

Valid From/Valid To: If you want to specify starting and/or ending dates when this Cross Sell setup is valid or not, you can enter them in here.

Documents: These selections will be defaulted in from the Cross Sell Configuration screen we saw earlier, but you can change them here for this specific item if you want.

Import: This selection will allow Cross Sell Configuration data to be imported from a spreadsheet. Below is column format for you must follow if you want to create cross-sell item from a spreadsheet.



Cross Sell Items Grid

Cross Sell Item: Enter the items that are available as additional items on this Cross Sell setup. These items will automatically appear in the Cross Sell grid during processing of the marketing documents that are flagged for Cross Sell and depending on the various configuration settings.

CS Item Description: This will display with the Cross Sell item description.

Quantity Calculation Method: This will default in from the settings in the Cross Sell Configuration screen we saw earlier but you can change it here for this specific item if you want.

Display if Not Availability: This will default in from the settings in the Cross Sell Configuration screen we saw earlier, but you can change it here for this specific item if you want.

Once you have made your selection you can add the record to Cross Sell.

You can also access this screen by right-clicking on an Item Master record and selecting the Cross Sell Definition option.

Process

The process with Cross Sell is fairly straightforward. Let's use the example we saw above for item A00001.

From Sales Order, enter in a customer, enter in item A00001, and then enter the quantity. Since the default setting in the Cross Sell Configuration for window presentation is *Prompt User*, it will pop up a window asking if you want to open the cross sell window for this item.

The screenshot shows a 'Sales Order' window with a 'System Message' dialog box. The dialog box contains the text: 'Do you want to display cross sell items associated with this item?' and two buttons: 'Yes' and 'No'.

The background window shows the following details:

- Customer:** C40000 (Earthshaker Corporation), Contact Person: Bob McKensly, BP Currency: \$
- Order Details:** No. Primary 254, Status Open, Posting Date 04/07/2020, Delivery Date 04/30/2020, Document Date 04/07/2020
- Item Table:**

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Whse	Del. Date	UoM Code	C...
1	A00001	1.000	500.00 \$	0.000	LG	500.00 \$	01	04/30/2020	Manual	
2				0.000				04/30/2020		
- Summary:** Total Before Discount 500.00 \$, Discount %, Freight, Rounding 0.00 \$, Tax 45.00 \$, Total 545.00 \$
- Sales Employee:** Sophie Klogg
- Buttons:** Add & View, Cancel, Recalc Prices, Reservations, Copy From, Copy To

If answered yes, it will open the Cross Sell Item window with all the default information that we setup in the item cross sell record.

Select	Quantity	UoM	CR Item #	CR Item Desc.	Unit Price	Extended	Whse	In Stock	Committed	On Order	Image
<input checked="" type="checkbox"/>	1		I00007	HP Printer 95 Inkjet Cartridge	35.00	35.00	01	885.00	18.00	71.00	
<input checked="" type="checkbox"/>	1		LM4029MC	Memory Chip	62.50	62.50	01	222.00	156.00	171.00	

With the Cross Sell Item window open, check the select box for all the items that you want to copy in, as well as confirm or update the quantity. When you have made all your selections, you can select the Update button.

That will copy in the selected items and quantities into the document.

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Whse	Del. Date	UoM Code	C...
1	A00001	1	500.00 \$	0.000	LG	500.00 \$	01	04/30/2020	Manual	
2	I00007	1	35.00 \$	0.000	LG	35.00 \$	01	04/30/2020	Manual	
3	LM4029MC	1	62.50 \$	0.000	LG	62.50 \$	01	04/30/2020	Manual	

Now we can continue working on our document and add it when it is complete.

That's all there is to it with Cross Sell. A very simple and effective solution to help drive sales with add-on items.