Cross-selling and Upselling

Overview

Product suggestions are a great way to help your customers find what they need. Whether it's the correct light bulb for the lamp they're buying, or a newer model of the power tool they're viewing, you can increase sales and improve the customer experience by offering *alternate* and **accessory** product suggestions.

This practice is also known as cross selling and up selling, and this article will show you how to do it.
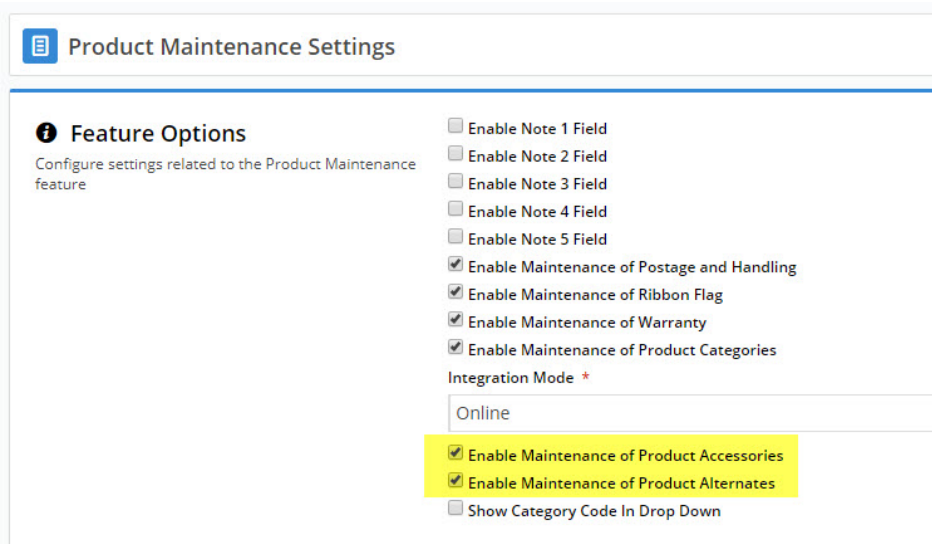
1. Maintain Product Data

There are two ways to maintain alternate & accessory data for your products - via the CMS, or in PRONTO. Each method is outlined below.

CMS Maintenance

If your business chooses to maintain alternate and accessory data in the CMS, you need to first ensure that the option is enabled for your site:

1. Go to **Settings Feature Management Products & Catergories**.

2. Search for the **Product Maintenance** feature and click **Configure**.

3. Tick the boxes to **Enable Maintenance of Product Accessories** and **Enable Maintenance of Product Alternates** and **Save**.

> ℹ️ Before you begin, contact Commerce Vision to have us check that alternate/accessory integration has been disabled properly for your site. Otherwise you may find that you maintain data in the CMS and it gets mistakenly overwritten by the integrator.

Now you're ready to edit a product:

1. Go to **Products & Categories Product Maintenance**.

2. Search for and **Edit** the product you wish to add alternates/accessories to.

3. Scroll to the **Accessories** or **Alternates** section as required.

4. Enter a **product code or description** in the input box, and select the correct product from the dropdown.

5. Click **Add Accessory** (or 'Add Alternate', depending on the type of product you're adding).

6. Repeat as necessary for additional accessories and alternates.

7. **Save** or **Save & Exit** at the top of the page.

ERP Maintenance

If the bulk of your product data is maintained in a non-Pronto ERP, this information will be integrated online.

For PRONTO ERPs,

If the bulk of your product data is maintained in the Pronto ERP, here's where you can find Alternate & Accessory maintenance in PRONTO:

1. In PRONTO, go to '**Web Site Category / Product Maintenance**' '**Stockcode Review**'.

2. Click '**Find**' to search for a product by stockcode.

3. With the required product highlighted, click '**Acc' (Accessories) or 'XSell' (Alternates)**.

4. Add an accessory or alternate to the product by clicking '**Entry**' and entering the product code.
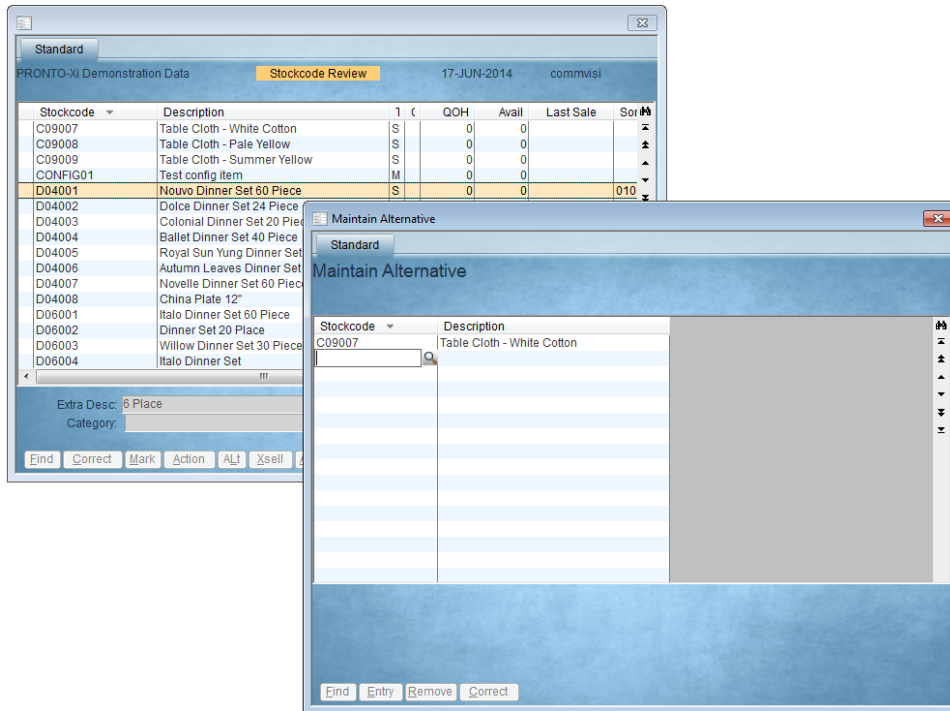
5. **Repeat** the above steps as required for additional accessories and alternates.
6. Use the **ESC** key to back out of product edit mode and save changes.

Integrate

To push your PRONTO changes to the web, you'll need to login to the Integrator:

- to integrate Alternates, click send **Changed** for '**Product Master & Pricing**'.
- to integrate Accessories, click send **All** for '**Product Notes**'.

|	Last Sent (Timings)	Last Sent (Manual)	Next Send (Changed)	Next Send (All)	Status	Send Now		Manu:
Customer Master :	08-08-16 10:00 AM	07-01-16 12:20 PM	08-08-16 02:00 PM			All	Changed	
Customer Transactions :	08-08-16 02:00 AM	11-01-16 08:30 AM	09-08-16 02:00 AM			All	Changed	
Product Categories :	08-08-16 10:00 AM	12-04-16 10:53 AM	08-08-16 02:00 PM			All	Changed	
Product Master + Pricing :	08-08-16 10:00 AM	21-06-16 04:01 PM	08-08-16 02:00 PM			All	Changed	Set Or (11 Sel
Product Availability :	08-08-16 10:00 AM	27-10-15 10:00 PM	08-08-16 02:00 PM			All	Changed	
Product Notes :	08-08-16 10:00 AM	27-10-15 02:23 PM	08-08-16 02:00 PM			All	Changed	
Product Images :	08-08-16 12:05 PM	02-08-16 09:33 AM	08-08-16 12:10 PM			All	Changed	
Documents :	08-08-16 12:05 PM	07-07-14 01:46 PM	08-08-16 12:10 PM			All	Changed	
Supplier :						All	Changed	
Stock Supplier :						All	Changed	
Discounts + Special Pricing :	08-08-16 10:00 AM	30-06-16 09:45 AM	08-08-16 02:00 PM			All	Changed	Set Or (8 Sele
Current Orders :	08-08-16 12:00 PM		08-08-16 12:20 PM			All	Changed	
Archive Orders :	08-08-16 02:00 AM	07-01-16 12:19 PM	09-08-16 02:00 AM			All	Changed	
Custom Tables :	08-08-16 10:00 AM	21-06-16 04:01 PM	08-08-16 02:00 PM			All	Changed	Set Or (2 Sele
System Table :	08-08-16 10:00 AM	12-04-16 10:56 AM	08-08-16 02:00 PM			All	Changed	
Receipting :	08-08-16 10:00 AM		08-08-16 02:00 PM			All	Changed	
CRM :						All	Changed	
Retrieve Pending Customers :	08-08-16 10:00 AM	13-06-16 11:40 AM	08-08-16 02:00 PM			Get		
Retrieve New Orders, etc :	08-08-16 12:05 PM	13-06-16 04:30 PM	08-08-16 12:10 PM			Get		

2. Display this content on your site

Add the Cross Sell / Up Sell Widget to your product detail template to display these product suggestions to the end user as they browse your site. To display both alternates and accessories, two instances of this widget are needed.

If a product has no alternate or accessory products loaded against it, the widget will simply not display on the page for that product.

1. Go to **Content Standard Pages**.

2. Search for and **Edit** the **Product Detail** template.

3. Locate the best placement for this content (in our case it was Zone:Bottom), and click **Add Widget**.

4. Search for and select the **Cross Sell /Up Sell** widget and click **Add**.

5. Edit the widget and **select either Cross Sell (accessories)** or **Up Sell (alternates**) from the dropdown.

6. Configure other options as required and click **Save**.

7. To display both alternates AND accessories on the product detail page, repeat steps 3 - 6, this time selecting the other option from the 'Cross Sell or Up Sell' dropdown.
   This means there will be two instances of the widget on the template.
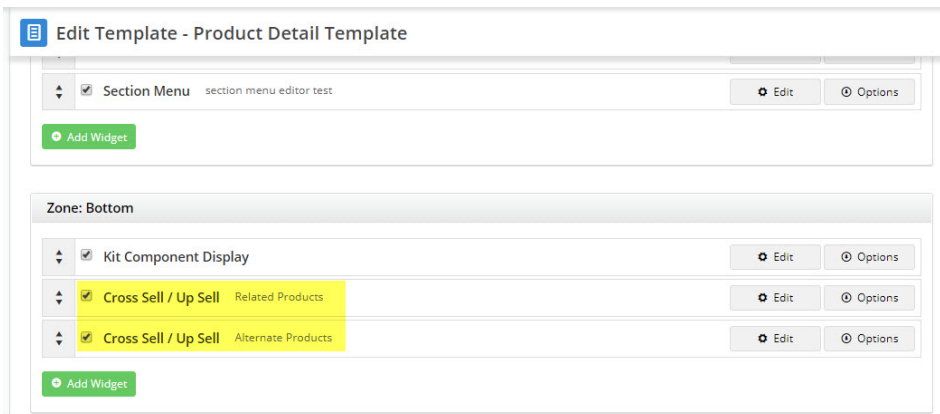
Test Cross-sell/Upsell

Load your website in another browser (or incognito window) to see your changes in effect!

Foolscap Suspension Files, Green, Recycled, 50 Box

Product Code: CV305

Zoom

$26.50 inc GST

zip | **own** it now, up to 3 months interest free learn more

| 1 | + − |

Add to cart | Check out with **PayPal**

Technical Specifications

| Size | Foolscap |

Download

Related Products

Suspension File Tabs, Clear, 50 Pack

Code: CV306

$6.95

inc GST

| 0 | ▲▼ | Add to cart |

Suspension File Tab Inserts, White, 50 Pack

Code: CV307

$0.99

inc GST

| 0 | ▲▼ | Add to cart |

Alternate Products

Additional Information

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Minimum Version Requirements	3.75.00
Prerequisites	--
Self Configurable	Yes
Business Function	Marketing
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Alternate Product Substitution
- Product Maintenance
- Product Unit Of Measure Selector
- Product Maintenance Settings
- Web Category and Product maintenance in PRONTO
- Backordered Products & Ordering

Related widgets

- Cross Sell / Up Sell Widget