INVENTORY SUBSTITUTIONS & UPSELL

*UPSELL MORE & DON’T LOSE SALES DUE TO OUT-OF-STOCK ITEMS*

- Easy setup of substitution items and upsell recommendations.
- Quickly find alternate items if a requested item is out of stock.
- Suggest companion items for easy upsells.

**SIMPLE INVENTORY SETUP:**
Using the Acumatica Items screen, easily define substitute inventory and companion (upsell) items.

**RECOMMENDATIONS AT YOUR FINGERTIPS:**
Using the Sales Order screen, this add-on gives users quick access to instant recommendations. Quickly see out-of-stock items, what options are available as replacements, and additional items (companion items) of interest.

**KEY BENEFITS**

**MAXIMIZE SALES**
- Provides your team with easy to find inventory substitutions & upsell options
- Don’t lose any sales due to out-of-stock items

**FILL ALL YOUR ORDERS**
- On-the-spot substitutions
- Set up substitution availability by warehouse
- Fulfill all orders quickly
- Keep customers happy

**EASILY UPSELL**
- Recommend additional items
- Select one or multiple items
- Set up upsell items availability by warehouse
- No more guessing on quantities to purchase
### INVENTORY SUBSTITUTIONS & UPSELL FEATURES AND CAPABILITIES

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
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<tr>
<td>Designate Inventory Items</td>
<td>Easily categorize inventory items as substitutions and/or companion items while in the Item Master screen.</td>
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<tr>
<td>Fully Integrated</td>
<td>Substitution and upsell items are shown in the Acumatica Sales Orders screen.</td>
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<tr>
<td>Substitution Button</td>
<td>If you don’t have the quantity needed to fulfill an order, click on the Substitution tab and you will see a list of recommended substitute items.</td>
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<tr>
<td>Swap Items in the SO</td>
<td>Quickly replace the out-of-stock items in a sales order with the new substitute item and finish the order.</td>
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<tr>
<td>Add or Upsell with Companion Items</td>
<td>With one click, you can view complementary items available in the details area. Easily add those to the order.</td>
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<td>Visual Cues</td>
<td>Easy-to-see checkboxes quickly indicate the availability of substitute or companion items; there is no need to open an additional screen.</td>
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<td>Warehouse Views</td>
<td>For any product, view the substitution and companion item availability by warehouse.</td>
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<tr>
<td>Quantity Adjustments</td>
<td>If necessary, different quantities will be recommended for the substitution/upsell products.</td>
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### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

### STREAMLINE OPERATIONS

Manage your business more efficiently:
- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

### ADAPTABLE SOLUTION

Add and extend:
- Deploy in-house, or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

### YOUR BUSINESS ACCELERATED

Get a single version of the truth:
- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per-user pricing—system scales as your business grows