

Add-On Sales with Related Items

Andrew:

Two gallons of mat paint? I can get that mixed for you! Would you like to add a drop cloth to your order?

CUSTOMER:

Oh, yes please. I didn't even think about that, good idea!

Robert:

You can set up Eagle to suggest or add related products to transactions.

This helps your team offer valuable Add-On items for your customers, and make sure to include important item pairings.

Pick a topic, and I'll walk you through it!

Topics

- Setup
- Selling
- Reporting

Setup

You can assign Related Items to a Parent SKU to have Eagle suggest or automatically add them to a sale or credit.

Configure Related items to prompt clerks, so they can make informed suggestions to customers.

Begin by opening Inventory Maintenance and loading the Parent SKU that you want to assign related items to. Select the Miscellaneous Menu and choose Related SKU Viewer.

Select Add to input a related Item. Eagle shows a list of relationships to connect another SKU with.

If you have a similar product already set up with the correct SKU relationships, you can assign it as a Reference Item. Eagle then uses the Related Items from that product.

Items set to Normal Related prompt the clerk at Point of Sale to sell the item the first time the parent SKU appears on a transaction.

You might use this with something like a drop cloth when selling paint.

No matter how many colors of paint they buy, the customer probably only needs one drop cloth.

When you assign the Repeating Related relationship, Eagle gives the clerk a prompt every time you add the parent item on a transaction.

Selections four through seven automatically include the item with the transaction, rather than just suggesting it.

Setting an item as Sells With directs Eagle to automatically add it on a transaction when the clerk sells the parent item.

In a Sells/Credits With relationship, Eagle includes the related item with the parent item when you sell it, and when a customer returns it.

If you assign this to a tint charge for paint and the customer returns the paint, Eagle credits the tint charge along with the refund for the paint.

You can use a Credits With relationship if you charge a restocking fee for returns. In this case, set the restocking fee SKU as a Credits With related item.

This option applies to a return credit for the parent item, but not when it is sold.

Sells with Credit automatically includes the related item with a credit for the parent.

A good use for this is to assign it to a restocking fee to offset a return credit.

Select the relationship you want and choose OK.

Depending on your selection, this screen may vary some.

Enter the SKU of the related item and quantity you want to suggest.

Choose if you want Eagle to always use the Suggested Quantity, or if it should multiply it by the number of purchased Parent Items.

Assign an option to compute the price.

Customer Price uses the customer's default, Specified Fix Price charges a set cost, No Charge includes the item for free, and Specified % of Parent SKU's Price calculates the price from the parents.

Select OK to add the related item to the parent item. Eagle allows each SKU to have up to 900 related items.

Continue adding entries as needed.

Selling

When you sell a SKU that has an assigned Related Item, Eagle either adds the item to the transaction or asks if you want it added based on the configured relationship.

In POS, enter the Parent SKU as usual.

Eagle posts it to the order and displays any suggested related items.

To add one to the transaction, enable the checkbox and choose Select.

If you do not want to include any of the suggested items, simply close the Related SKU Display.

Eagle automatically includes Related Items that your administrator assigns to a Mandatory Sell-With relationship.

These products appear immediately after their Parent Items.

Notice that we never added the Stir Stick SKU to the order; Eagle included it with Paint parent item.

The Mandatory and Suggested Related Items helps you consistently suggest essential products for your customers!

Reporting

You can use the Alternate Part Number report to identify the SKUs in your system that you have Related Items set to Sell With or Sells/ Credits With.

Locate and open the Alternate Part Number Report.

On the Options tab, set the Report Type to C:

Print POS Sells Withs/Relateds.

Enable Option: Only Sells Withs.

Enter parameters in the From/To tab for the range you want the report to search.

Select Run.

View the results to see the details of related items set up as Type 4: Sells With or Type 5: Sells/Credits With.

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