

Upsale

Characteristic	Description
Purpose	Offering extended versions of products or new brands to the customer when processing their order Maintaining upsale products in the product catalog Prioritizing upsale products based on the order data
Area	Opportunity management
Creatio compatibility	Sales Creatio, enterprise edition 7.10+
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Accounts• Orders• Products

List of process participants roles

Role	Responsibilities
Sales manager	Maintenance of customer's orders Selection and confirmation of ordered products with the customer

Process description



Process step	Role	Step description
Product added to order	Sales manager	Sales manager adds a product to an order.
Find upsale products	Creatio	The system looks for upsale products based on added products of the order.
Upsale product found?	Creatio	The system automatically adds upsale products to the [Proposed products] detail.
Offer upsale products to client	Creatio	Upsale products show up on the [Proposed products] detail. Sales manager recommends these products to the client.
Upsale product added to order	Sales manager	Sales manager adds upsale products to the [Products] detail if the client agrees to purchase them.
Increase upsale product's rating	Creatio	If an upsale product is added to the final order, its rating automatically increases by one point.

Implementation guidelines

1. Install packages using the [Installed applications] functionality in [System designer] (please, install packages in the following order: 1. BpmProducts; 2. BpmUpSales).
2. Specify extended versions of products or similar new brands on the [Proposed products] detail with selected [Up] checkbox in the product catalog.