DYNAVISION

Documentation:
Cross-Selling

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1 Introduction

Welcome to the official manual of the Dynavision Cross-Selling module.

The Cross-Selling app makes it possible to group items into assortments based on categories, item attributes or on the manner that is needed for the company. The assortments can be nested or parented in a tree-hierarchy.
When an item from an assortment is offered, the app will help offer related items or up-sell and cross-sell.
Example given: when a certain roof tile is sold, the app will also offer the ridge tiles from that assortment and the corner roof tiles. This can also suggest the right timber.

2 Installation

2.1 Extension

The Dynavision Cross-Selling module is a separate Business Central extension.
1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Cross-selling** and install this app.

3 Configuration

3.1 Cross-Sell Setup

The cross-selling module gives the possibility to add a Cross-Sell Code to an item in order to set up a structure where items can be proposed for sale based on a certain criteria. These criteria are mainly linked to the item attributes.

Choose the search icon, enter **Cross-Sell Setup**, and then choose the related link.
This page contains some mandatory settings and options that needs to be set in order for the user to take advantage of all the features in this app.

1. **Cross-Sell Results tab**
   a. **Sort Results**
      Specifies how the cross-sell results should be sorted. Here the criteria can be set by which the Cross-Sell items need to be shown. Currently it is only possible to choose the option **Quantity Sold**. This option will show the Cross-Sell items ordered from most sold to least sold.
   b. **Quantity Sold DateFormala**
      Specifies the DateFormula to calculate the Quantity Sold field. *Example given: -1J; The system will look at one year's sales and the items will be ordered based on these quantities.*
   c. **Include Location Filter**
      Specifies if the Location must be included in the Quantity Sold calculation.
      If this option is enabled, the displayed list of Cross-Sell items will be filtered by the location. Only the quantities sold in this location will be taken into account.
   d. **Include Sell-To Customer Filter**
      Specifies if the Sell-To Customer must be included in the Quantity Sold calculation.
      If this option is enabled, the quantity calculation of items sold will only take the sales into account that were made by the current Sell-To Customer.

3.2 Cross-Sell Codes

Cross-sell codes are used to identify which Cross-Sell items will be suggested when a specific item is sold. Cross-Sell Codes can be set and reused across different (similar) products.

To make the most use of Cross-Sell Codes, it is recommended to use item attributes.
Cross-sell codes can be set up hierarchically. This makes it possible for new Cross-Sell Codes to inherit conditions from parent cross-sell codes (similar behavior to item categories).

The **Cross-Sell Codes** page can be accessed in two ways.

Option 1
On the **Cross-Sell Setup** page, choose the action **Cross-Sell Codes**.

Option 2:
Choose the search icon, enter **Cross-Sell Codes**, and then choose the related link.

On the page that opens, a list of the existing Cross-Sell Codes is available.
Choose the action **New** to create a new Cross-Sell Code or select a code that needs to be edited. *It is very important that a clear structure is set up within the item attributes and that these attributes are correctly assigned to the items. This will allow the Cross-Selling module to always present the correct Cross-Sell items.*

1. **General Tab**
    a. **Code**
        The code used to identify the Cross-Sell Code.
    b. **Description**
        The description of the Cross-Sell Code.
    c. **Parent Code**
        Specifies the Parent Cross-Sell Code that this Cross-Sell Code belongs to. Item categories that are assigned to a Parent Cross-Sell Code also apply to the child Cross-Sell Code. It is possible to choose a previous defined Code.
    d. **Show Results in Single Group**
        Specifies how the results in the Cross-Sell page need to be grouped. If disabled, the results will be grouped per Category. If enabled, the results will be shown in one single group.
    e. Specify the categories that apply to the Cross-Sell Code by creating lines in **Categories.**
        i.   **Item Category Code**
             Select the Item Category Code from the **Item Categories** list.
        ii. **Item Category Description**
             The description of the Item Category.
        iii. **Inherited-From**
             If a Parent Cross-Sell Code is selected, the Item Categories that are defined on the Parent Cross-Sell Code Card will be shown and this field will show the parent from which the category is inherited.
    f. The order of the Item Categories can be changed by using the action **Move up** or **Move Down**.
2. **Filters Tab**
    a. **Table**
        Select the table on which the filter needs to be applied.
        The options are:
        i. **Item Attribute,** and
        ii. **Item**.

b. **Field**
Select the field on which the filter needs to be applied. The options to select depend on the table that is selected in field **Table**.

c. **Inherit Value**
Specifies if the value from the source items will be used as filter value. If this option is checked, the next field cannot be filled in. *Example given: we want to see the items with the same model value as the source item.*

d. **Filter Value**
Specifies the value of the filter to include items in the results. If the option **Inherit Value** is not checked, a value needs to be filled in that will be used to filter the results for the Cross-Sell items. *Example given: we want items where the type is phone.*

e. **Apply Item Attribute Filter**
Specifies when the filter will be applied on item attributes.
The options are:
   i. **Always**: this will apply the filter on the item attributes. If no attribute is found, the item will not be listed.
   ii. **When attribute exists**: the filter will only be applied if the attribute is present on the item.

f. **Inherited-From**
If a Parent Cross-Sell Code is selected, the filters that are defined on the Parent Cross-Sell Code Card will be shown and this field will show the parent from which the filter is inherited.

3. **Lines Tab:** it is possible to add items to the Cross-Sell Codes card by defining them in the Lines Tab. These items will always be suggested along with the Cross-Sell items that are the result of the particular Cross-sell Code Card.

a. **Type**
Specifies whether the line is for a general ledger account, item, fixed asset or item charge.

b. **No.**
Specifies the number of the general ledger account, item, resource, additional cost, or fixed asset, depending on the content of the **Type** field.

c. **Description**
Specifies a description of the entry, which is based on the contents of the **Type** and **No.** fields.

d. **Quantity**
Enter the number of units.

e. **Inherited-From**
If a Parent Cross-Sell Code is selected, the lines that are defined on the Parent Cross-Sell Code Card will be shown and this field will show the parent from which the line is inherited.

4. When everything is set and inserted, it is possible to test the setup and see which would be the results for an item in the **Cross-Sell Code Card**. This can be done by choosing the action **Test**.

5. On the page that opens, an item needs to be selected to test.

6. After selecting the item and choosing **OK** the Cross-sell results will be shown.

3.2.1   Example

Item setup:

The structure of article categories and associated article attributes is structured as follows:
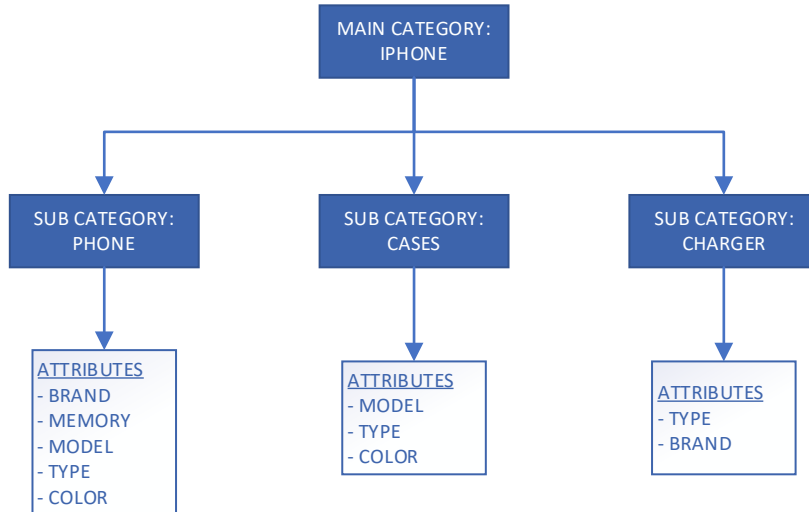
These attributes are assigned to each item to which it is applicable with the appropriate matching attribute value.

On the **Iphone** we define e.g.

- **BRAND:** APPLE;
- **MEMORY:** 64 GB;
- **MODEL:** 13PRO;
- **TYPE:** Phone;
- **COLOR:** Blue.

On the **Case** we define e.g.

1. **MODEL:** 13PRO;
2. **BRAND:** APPLE;
3. **TYPE:** Case;
4. **COLOR:** Blue.

On the Charger we define e.g.

- **BRAND:** APPLE;
- **TYPE:** Charger.

Cross-sell Code Card

The Cross-Sell Code Card IPHONE is created. The Item Categories that are defined are as follows:

Item Category Code	Item Category Description	Inhrited-From
CASES	Cases	

CHARGERS	Chargers	
OTHER	Other Items	
PHONES	IPHONE Phones	

The filters Tab contains following:

Table	Field	Inherited Value	Filter Value	Apply Item attribute Filter	Inherited-From
Item attribute	MODEL	☑	_	Always	

Following results are given when using the action **Test** with item IPHONE 13 PRO-GREY-64GB

Edit - Cross-Sell - ART00015 IPHONE 13 PRO-GREY-64GB

Description		Quantity	Unit of Measure code
∨ **Cases**			
→ CASE RED IPHONE PRO 13 PRO	⋮		STUKS
CASE BLACK IPHONE 13 PRO			STUKS
IPHONE 13 PRO-BLUE-64GB			STUKS
IPHONE 13 PRO-SILVER-64GB			STUKS

3.3 Usage

When selling items, there is regularly the wish to sell accessories or other related products as additional complementary items. The Cross-sell module will facilitate finding and selecting these additional articles.

These items can be added on a sales quote and a sales order.

1. Navigate to the sales order list page and create a new sales order by choosing the action **New** or choose a sales order that needs to be completed.
2. After entering the line of the item that needs to result in cross selling items, make sure this line is selected and choose the action **Select Cross-Sell Items…** that can be found in the **Lines tab** trough **Line, Functions.**
3. After choosing this action, the Cross-Sell items page opens. In this page, the items are displayed according to the settings in the Cross-Sell Code that is assigned to the item. The items van be added to the sales order/sales quote in two ways.

a. **Option 1:** Change the quantities for the items that need to be included on the sales order. These items will be added in the lines of the sales order/quote with the entered quantity.

b. **Option 2:** Check the **Selected** checkbox for the items that need to be added to the document. These items are added to the lines of the sales order/quote without quantity.

c. In the **Selected Lines Tab** on the **Cross-Sell items** page, a preview is shown of the lines that will be added to the sales document. When choosing **Close** the lines are added.