Mysoft Plugin Data Sheet

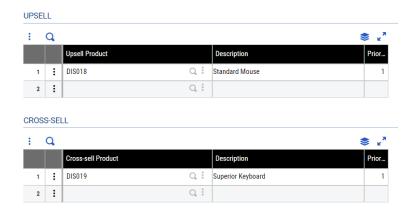**mysoft**
UNLOCKING POTENTIAL

Telesales

Description

The Telesales plugin allows easy access to a wide variety of Sage X3 functionality from within Sales Order creation. It includes;
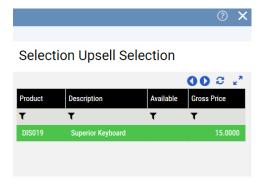
- Cross Sell / Upsell
- Missed Products / Order History
- Product Substitutions
- Product Alternatives
- Monthly Spend – view the customer's monthly spend
- Additional fields showing key information

Cross Sell and Upsell

Two new grids have been added to the product to enter Cross Sell and Upsell items.
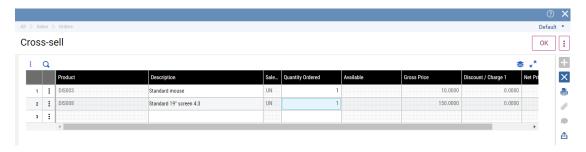

If a product is keyed onto a sales order and upsell items are found, the user have a list of possible replacements. In this example the user is prompted to upsell from a standard to a superior keyboard.
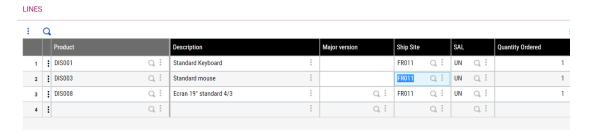
Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 1 of 6

Mysoft Plugin Data Sheet

If cross-sell items are listed against the product, the user will be able to enter a quantity required. In this example the user is prompted to add a mouse and screen when a customer orders a keyboard.

After clicking 'OK' the lines with a quantity ordered will be added to the sales order.

Order History/Missed Products

A new option has been added to Sales Order Entry to display to a list of products purchased by the customer. A system parameter defines how the 8 history periods are populated. The options are Daily, Weekly, Monthly, Quarterly. There is also an option that shows the last 8 orders.

If you enter a value in the Quantity Ordered field and click OK the products will be added to the Sales Order.

When a new order is created a check for missed products will be made. Using the Order History parameters if any products sold in the defined time-frame are not included the following window will be displayed.

Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 2 of 6

Mysoft Plugin Data Sheet

If a value is entered in the "Quantity Ordered" column the product will be added to the Sales Order by clicking OK.

The missed product search is controlled at customer level. A new field has been added to the customer and customer category screen.

☑ Missed Products

Product Substitutions

When a product supersession is available a new prompt is now shown so the user can choose to ignore it.

Question
DIS009 has been superceeded by DIS006
Allow this supercession?

                                                                    YES   NO

The display of the prompt is controlled by a new parameter. It can be over-ridden at product level.

Auto Supersession
◉ Prompt
○ Yes

A new field has been added to the product to display the superseded as well as the superseding product. It makes it easier to track seasonal product code changed.

SUPERSESSIONS

Superseded by	Supersedes
DIS019	DIS017
Standard keyboard - 2019	*Standard keyboard - 2017*

Product Alternatives

A new tab has been added to the product screen so that a list of alternatives is available.

Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 3 of 6

ALTERNATIVES

		Product Alternative	Description	Prior...
1	⋮	DIS018	Standard keyboard - 2018	1
2	⋮	DIS017	Standard keyboard - 2017	2
3	⋮			

When a product is entered on a new Sales Order line and there is no stock available and alternatives exist the following prompt is displayed.

Question
No Stock Available. Select alternative sales product ?

YES   NO

After selecting "Yes" the user is shown the list of alternatives.

Selection Product Alternatives

Product	Alternative	Description	Priority	Available
DIS019	DIS018	Standard keyboard - 2018	1	100.00
DIS019	DIS017	Standard keyboard - 2017	2	0.00

The user can select the alternative from the list which will replace the original product on the Sales Order line.

Monthly Spend

A new tab in sales order entry enables the user to quickly see a customer's spending pattern. The data is updated in 'real time' to ensure the information is current.

Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 4 of 6

Mysoft Plugin Data Sheet

Additional Fields

The Credit Limit, Balance and Available Credit have been added to the Sales Order header so they are easily viewable.

Credit Limit	Balance	Available
125 000.00	97 297.11	27 702.89

The Quantity on hand and Quantity Available is displayed below the order lines.

On Hand		Available Stock	
25350.000	LB	25350.000	LB

The following fields have been added to show customer order totals. Although the Period is defaulted via a system parameter it can be changed to Daily, Weekly, Monthly, Quarterly, Half Yearly or Yearly.

Period	Orders	Value	Gross Weight	Net Weight
Daily	3	660.00	3.250	10.500

The product selection has been enhanced to show the quantity available.

Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 5 of 6

Mysoft Plugin Data Sheet

Selection Product - Sales

Product	Description	Type	Qty Avail	Base Price	Currency	UPC Code
DIS013	IPHONE 5	Normal	19249	800.0000	EUR	3782940199688
DIS012	IPAD 5 retina black	Normal	16497	220.0000	EUR	3782940199689
DIS016	Samsung Galaxy S7	Normal	533	0.0000	EUR	EANAC110-1300
COM015	Taptic engine Apple Watch	Normal	217	0.0000	EUR	
DIS001	Standard keyboard	Normal	171	15.0000	EUR	3782940199627
DIS005	Win PC anti-virus	Normal	97	40.0000	EUR	3782940542100
DIS008	Standard 19" screen 4:3	Normal	59	150.0000	EUR	
FAS001	Capitalisable item from stock	Normal	47	0.0000	EUR	
COM012	Apple Watch Sport band	Normal	25	0.0000	EUR	
DIS003	Standard mouse	Normal	19	10.0000	EUR	3782940199628
MPM001	Apple Watch Sport	Normal	9	700.0000	EUR	
INT501	Axle Grease	Normal	0	0.2000	EUR	3782940237648

The following information has been added to the Sales tab on the product screen.

SALES VALUES

Main Site	Currency	Cost	Gross Margin
→ FR011	EUR	144.4151	43.0248
Comptech SA			

Annual Sales Value	Annual Margin
1760.0000	604.6400

Document	MBP DSTC	Version	4.1	Date Issued	19/12/19	Next Review	19/12/20	Author	BJM	Reviewer	BJM

Page 6 of 6