Sales Assist Group – Configuration & Usage Guide

This document describes the steps required to create a **Sales Assist Group**, configure its lines, assign the group to items or resources, and use it on sales documents to add related items.

1. Creating a Sales Assist Group

The Sales Assist Group acts as a container that defines which related items, resources, charges, or accounts can be suggested and added when a master item or resource is used on a sales document.

Steps

1. Open the **Sales Assist Groups** page.
2. Create a new group.
3. Specify the following fields:
    - **Code** - A unique identifier for the Sales Assist Group.
    - **Description** - A clear description explaining the purpose of the group (for example, *Accessories for Product X* or *Installation Services Package*).

2. Creating Sales Assist Group Lines

Sales Assist Group Lines define the individual components that can be added to a sales document when the group is used.

Steps

1. With the Sales Assist Group open, select the **Sales Assist Group Lines**.
2. Create a new line for each related component you want to make available.
3. Specify the following fields on each line:
    - **Type**
      Select the line Type. Supported types include:
        - Item
        - Item Charge
        - Resource
        - G/L Account

- **No. -** Select the item, resource, charge, or account number relevant to the selected type.
- **Currency Code -** Specify a currency code if pricing should be restricted to a specific currency. Leave blank for local currency.
- **Default Quantity** (optional) - Enter a default quantity that will be suggested when the line is added to a sales document.
- **Default Unit Price** (optional) - Enter a default unit price to be suggested on the sales line.
- **Included by Default -** Specify whether this line should automatically be included when the Sales Assist Group is used, or whether the user must manually select it.

4. Repeat these steps for all required group lines.

3. Set Line Priority

1. Use the **Move Up** and **Move Down** actions to adjust line order.
2. Priority determines the creation of sales lines:
    - **Lower priority value = processed first.**

4. Assigning a Sales Assist Group to an Item or Resource

Once a Sales Assist Group is configured, it must be assigned to an item or resource to act as the **master** from which related items can be added.

Steps

1. Open the **Item Card** or **Resource Card**.
2. Locate the **Sales Assist Group Code** field.
3. Select the appropriate Sales Assist Group.

Once assigned, this item or resource will allow users to add the related items defined in the group on sales documents.

5. Using Sales Assist on Sales Documents

Sales Assist is available on sales documents such as **Sales Quotes**, **Sales Orders**, and **Sales Invoices**.

Steps

1. Open a sales document (Quote, Order, or Invoice).
2. Add a sales line with the **master item or resource** that has a Sales Assist Group assigned to.
3. Select the sales line.
4. Open the **Sales Assist** menu on the lines (Line -> Sales Assist).
5. Choose **Add Related Items**.
6. A list of related items from the Sales Assist Group Lines is presented:
   - Lines marked as **Included by Default** are preselected.
   - Optional lines can be manually selected by the user.
7. Confirm the selection.
8. The selected related items are added as new sales lines, using:
   - The configured default quantities (if specified)
   - The configured default unit prices (if specified)

6. Result

By using Sales Assist Groups:

- Users can quickly add predefined sets of related items.
- Sales document creation is faster and more consistent.
- Upsell and cross-sell items are standardized and easier to apply.