



Forsys Catalog

User Guide

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About This Guide

This guide walks users through the steps of using the Forsys Catalog solution.

Invoke Catalog

Users can invoke the Catalog from the Detail Page Button on Header Object.

1. Go to the Header Object record and click on the Detail Page Button to invoke the Catalog.

Steps to Add Products to the Cart

1. Users can add the products to the cart from the Catalog or search for the products and add them.

Steps to Apply Filters on the Products

1. Filters can be applied on the products based on the Product Category, Subcategory and Family from the Search Component or Categories Component or Products view in Grid View Icon/Expanded Grid View.
2. Click on the filters icon and select the filters you want.
3. Click on Search to get the filtered product results.
4. To reset filters click on the Reset Filters button.
5. Categories can be selected from the Categories Icon.
6. Click on the categories icon and select the Product's category you want.
7. Click on Category or Subcategory or Family of any Product to view all products in that Category or Subcategory or Family.
8. Click on All Products to remove all the applied filters and view all Products.

Steps to Change the View of Products

1. Products view can be changed by clicking on List View Icon/Grid View Icon/Expanded Grid View Icon.
2. Use the pagination component, to navigate to another page.

Steps to View Cart and Add/Edit the Products

1. Click on the Cart Icon or Cart button below to view the Cart.
2. Products can also be added from the Cart from the search Component in the Cart.
3. Click on the clone icon to clone or delete icon to remove a product from cart.
4. If you want to clone or remove multiple products, select the products and click on the clone all button to clone all the selected products and remove all button to remove all the selected products.
5. If you want to mass update the products, select the products and edit the field which you want and Check the Update 'n' selected fields checkbox for all Non-Lookup Fields.
6. To save the products to the Line Item Object click on Save Button.
7. To go back to the record page click on Back button, if there are any changes made to the cart, then a warning toast message will appear, click again on back button to navigate back to the Header Object Record.
8. To go back to the Catalog page click on the Catalog button.

Note:

1. If any error occurs due to misinformation of the column in Display Fields Component, the column will not be displayed in Cart.
2. Apart from editing lookup fields, any edit made to the Cart will trigger in Net Price Calculation of all Products.
3. If any Default value exists for any Picklist field, that value will be automatically added to the Products or Line Item records in Cart.
4. The Subscription Term is only editable for the Recurring Products.
5. By Default, the Subscription Term and Quantity cannot be null or blank.

Steps to Apply Discounts to the Products

1. Discounts can be applied to the products individually or collectively.
2. If you want to apply discount of Percentage type to all products in cart, then enter the discount percent in Quote Totals Component.
3. If you want to apply discounts to multiple products, select the products and edit the discount type or discount value and Check the Update 'n' selected fields checkbox.
4. If you want to apply any discount to Products individually, then edit the discount type and discount value on Product.

Steps to Apply Markups to the Products

1. Markups can be applied to the products in the same way discounts are applied.
2. A Negative Discount Value would be considered as Markup Value while calculating Net Price of Product.

Steps to Save Products and Quote Totals

1. Click on the Save button to save the Products.

Note:

- 1) The fields to which the current user has edit access will only be saved to the Header and Line Item Object Records.
- 2) If any error occurs while calculating the Net Price of Products, then the user can't save the Products and Quote Totals.
- 3) If any error occurs while calculating the Quote Totals, then the user can only save the Products on the Line Item Object, not the Quote Totals (Summary Values) on Header Object and PriceChange value on Header Object will be saved as "Pending".