



Welcome to the Force.com Labs Product Catalog!

This guide will walk you through the process of integrating this app fully into your Salesforce org, and give you the tools and understanding to make it your own. In this guide, we will:

- Cover installation and getting started
- Discuss how you can enhance your existing products to utilize the Catalog
- Introduce you to the Catalog Brander
- Discuss how to start using the Catalog
- Walk through the Catalog's features



Salesforce Labs

Nick Edises, Aria Niazi, Andrea Conway

v1.1

August 18, 2014

1. App Installation

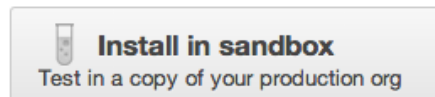
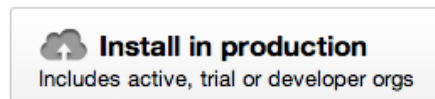
1) Click on Get it Now



2) Log In with your salesforce account username and password

3) Decide where you'd like to install the application

How would you like to continue?



4) Check Terms and Conditions and Click Install on Package Installment Details

☐ I have read and agree to the [terms and conditions](#) .

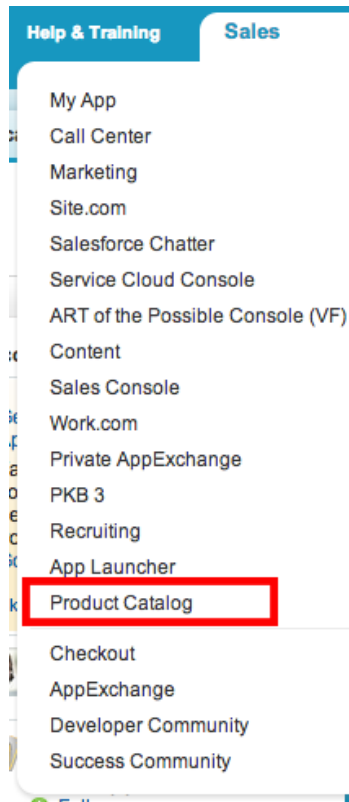
[Cancel Install](#) | [Back to previous step](#) **Confirm and Install!**

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

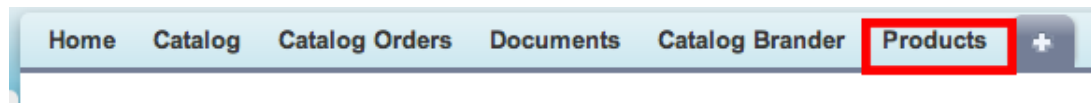
5) Wait for a confirmation on successful installation

2. Configure Product Object

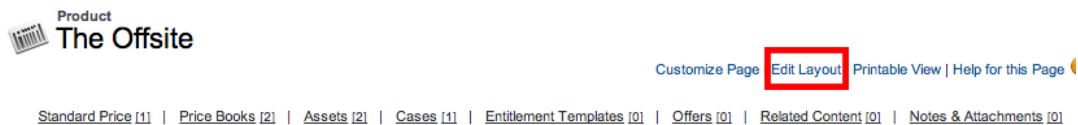
1) Switch to Product Catalog App



2) Add the Product Tab to the Catalog App



3) Select any Product record and click Edit page layout

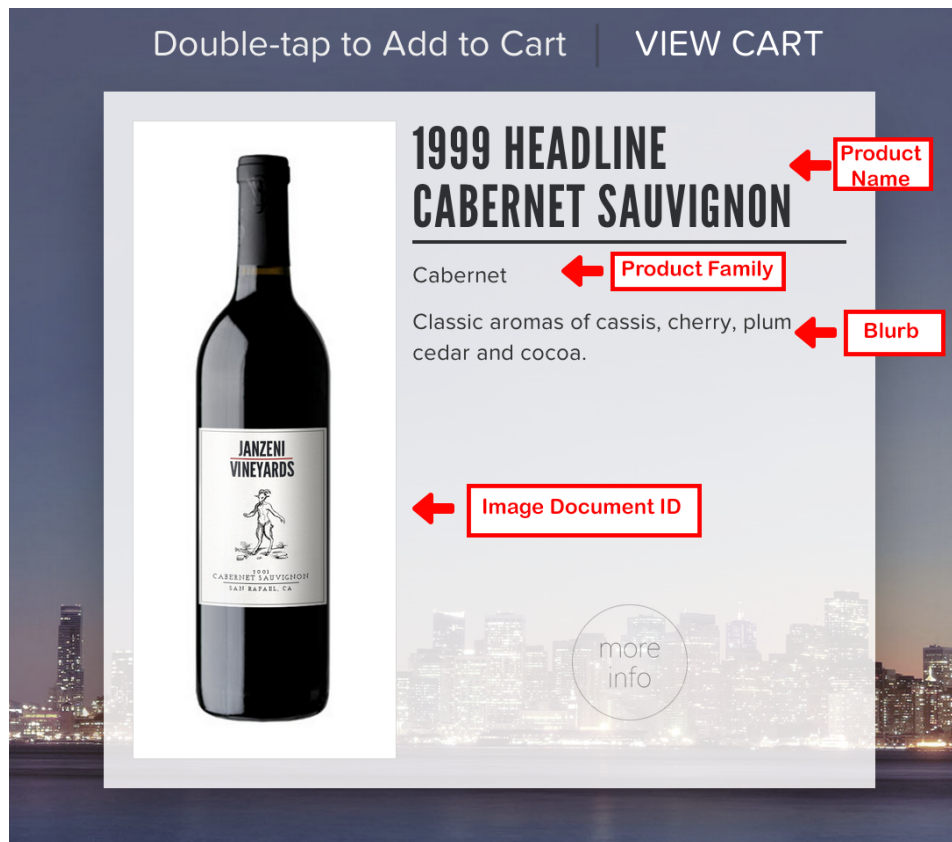


4) Quick find “Blurb”, “Image Document ID”, “Inventory”, “Detail”, “Mobile Ready”, “Price”, and drag the 6 fields to the page layout.

3. Prep records

1) The following fields are required for your Product records to display correctly in the Product Catalog:

- Product Name
- Product Family
- Product Description
- Blurb
- Image Document ID
 - To display images, you'll need to upload them as Documents in Salesforce. We recommend uploading them to the Catalog Documents folder. Set your Document as externally available, and then copy the ID into the Image Document ID field on your relevant Product.
 - For best results use image width: 130px and height: 330px.
- Inventory
- Detail
- Mobile Ready
- Price



Double-tap to Add to Cart

VIEW CART

1999 HEADLINE CABERNET SAUVIGNON

Cabernet



Product Family

In Stock



Inventory

\$69.00

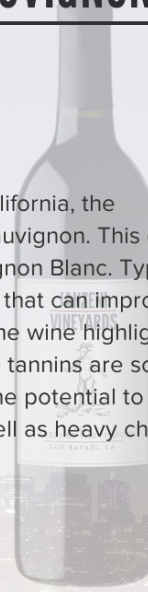


Price

While San Rafael is the fastest growing AVA in California, the predominant grape in the area is still Cabernet Sauvignon. This grape is a hybrid offspring of Cabernet Franc and Sauvignon Blanc. Typically heavy with tannins, Cabernet Sauvignon is a wine that can improve with age as the tannins soften and break down. The wine highlights the flavors of cherry, clove, raspberry and vanilla. The tannins are soft and supple making this an enjoyable wine now, with the potential to age for the next few years. Delightful with roasts as well as heavy cheeses and mushroom dishes.



Description



4. Customize your catalog with “Catalog Brander”

1) Update catalog home page text, text color, and text size.

Primary Text

Primary Color
 

Primary Size
 

Sub Text

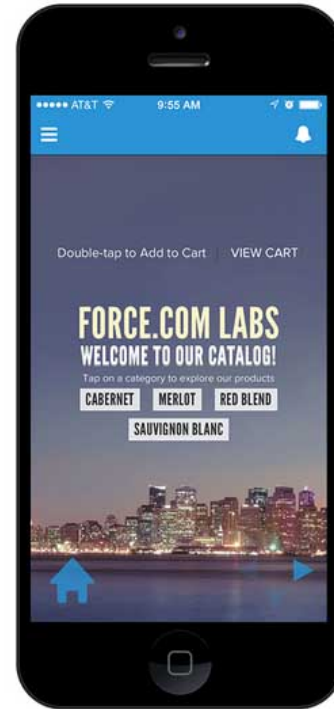
Sub Text Color
 

Sub Text Size
 

Category Text Color
 

Left Header Text Color
 

Right Header Text
 



2) Upload background image for catalog.

Upload Background Image: Catalog_BG

No file chosen

Uploads your background image file to the Salesforce document named "Catalog_BG".

3) Click “Save”

5. Viewing the Product Catalog

- 1) Ensure that the proper user Profiles or Permission Sets have access to the Product Catalog App, Tabs, Objects, Fields, Apex classes and Visualforce pages:
- 2) To view in Salesforce1, in Setup navigate to “Mobile Navigation” and add the Catalog menu item to the Selected list.

6. Using the Product Catalog

- 1) The Product Catalog is now available to users! You can access the catalog by clicking on the “Catalog” Tab.
 - You start on the catalog home, you can select a product category.
 - You can swipe right/Left to navigate through category pages, or use the handy navigation arrows.
 - Within each category you can swipe up/down to see all the products within that category.
 - You can return home at any point by using the button in the bottom left corner of the page.
- 2) While looking at a Product’s card, you can tap once to view more product details, or doubletap to add the product to your cart.
- 3) To view your cart, tap on “View Cart” in the upper right. From here you can update quantities, delete items, or progress to checkout.
- 4) You may choose to assign your order to an Account. This will allow you to view your completed order in the Catalog Orders related list on an Account record.