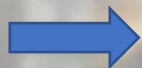
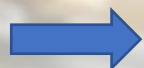


FULL FLOW OF INVENTORY

Opportunity



Service
Order



Asset



Start Seeing Your
Inventory with
SoClo Inventory App

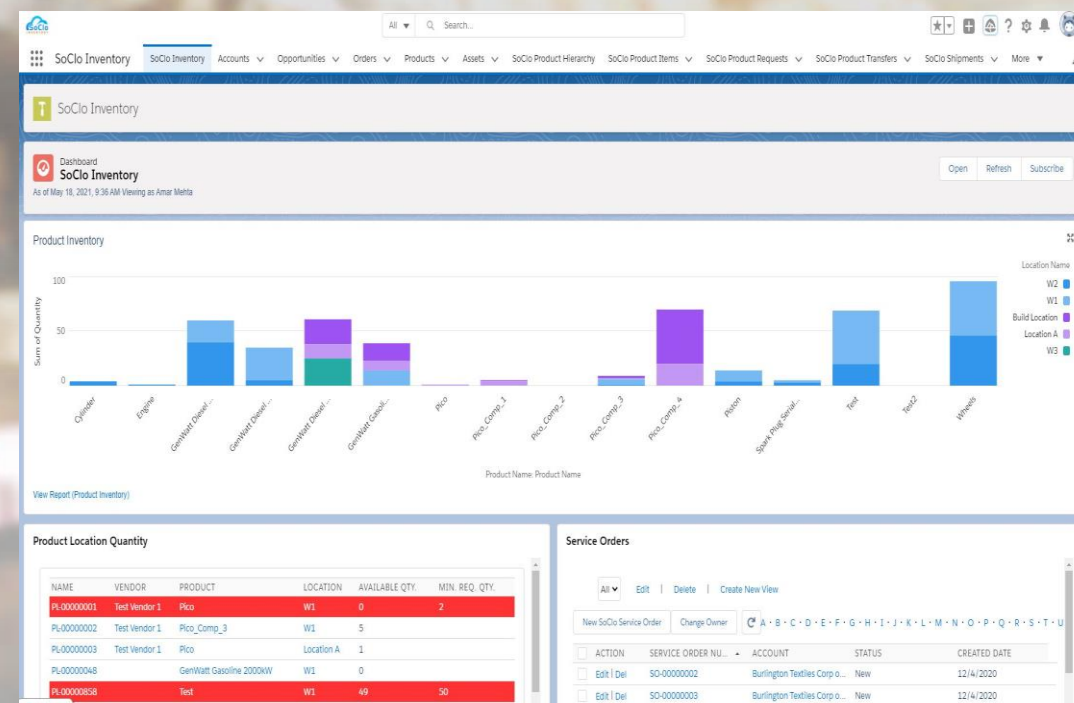
INCREASE REVENUE OPPORTUNITIES by knowing when your customers need maintenance

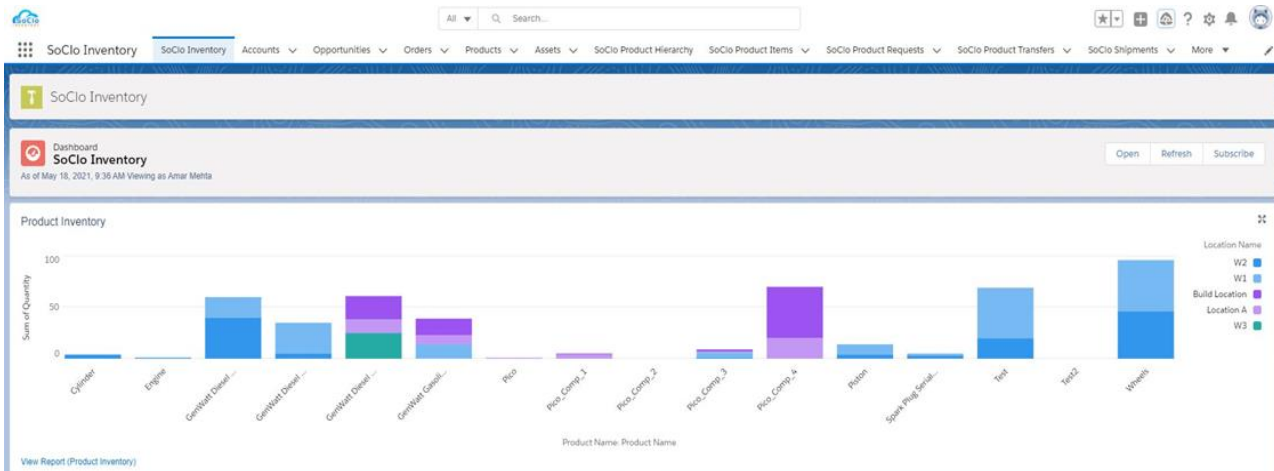
REDUCE EXCESS AND SAVE DOLLARS by knowing exactly where your inventory is located

ACCESS YOUR INVENTORY ON THE GO with the mobile ready view via Salesforce® mobile app

COST EFFECTIVE INVENTORY SOLUTION for small to midsize companies

ELIMINATES MANUAL MONITORING OF REORDER LEVELS by setting minimum thresholds & automatic notifications





Service Orders

ACTION	SERVICE ORDER NO.	ACCOUNT	STATUS	CREATED DATE
Get	SO-0000000	Acme	New	7/19/2021
Get	SO-0000001	Running World	Completed	7/20/2021
Get	SO-0000002	Acme	New	8/11/2021

Product Requests

ACTION	PRODUCT R...	SERVICE OR...	CREATED D...	SOURCE LO...	DESTINATIO...	STATUS
Get	PR-0000001	SO-0000000	7/19/2021	Egness Service #2	Received	
Get	PR-0000002		7/19/2021	Egness Service #2	Received	
Get	PR-0000003		7/21/2021	Magnolia Wareh...	Submitted	
Get	PR-0000004		8/11/2021	Warehouse 1	Submitted	
Get	PR-0000005	SO-0000002	8/12/2021	Warehouse 1	Submitted	

Product Transfers

ACTION	PRODUCT T...	SOURCE PR...	PRODUCT	DESTINATIO...	SOURCE LO...
Get	PT-0000001	PR-0000008	Gardenia Site		
Get	PT-0000002	PR-0000012	Egness Service #2		
Get	PT-0000003	PR-0000019	Magnolia Wareh...		
Get	PT-0000004	PR-0000027	Split AC Unit	Warehouse 1	

Product Hierarchy

Notifications

- A product transfer PT-0000004 is Ready.**
A product transfer PT-0000004 has been submitted by Lynn Grande.
Please check "received" when you receive the transferred product.
Thanks,
SoClo Inventory App
Aug 12, 2021, 9:17 AM
- A product request PR-0000005 has been submitted**
A product request PR-0000005 has been submitted by Lynn Grande for inventory transfer.
Please create a product transfer record to ship the product to Location Warehouse 1
Thanks,
SoClo Inventory App
Aug 12, 2021, 9:06 AM

SoClo Inventory Dashboard Provides Real Time Snapshots of Where Your Inventory is, Where it is Going, and When it Arrives

- Visual queues to show below minimum reorder point
- Use Public Groups to generate notifications for your users along the way



Start Seeing Your Inventory with SoClo Inventory App

Know Where Your Inventory is Geographically Located to Increase Shipping Efficiency

- Track products stored at each location and restock when needed
- Use the SoClo Inventory Map to generate a snapshot of inventory locations
- Your Inventory Location can be stationary or mobile



Start Seeing Your Inventory with SoClo Inventory App

The screenshot displays the 'New Location' form in the SoClo application. The form is divided into two columns. The left column contains fields for 'Location Name', 'Location Type' (a dropdown menu currently showing 'Warehouse'), 'Description', and 'Parent Location' (with a search bar). The right column contains fields for 'Visitor Address' (with a search bar), 'Time Zone' (a dropdown menu showing '--None--'), 'Driving Directions', 'Location' (a dropdown menu), 'Latitude', and 'Longitude'. Below the form is a map interface showing a Google Map of Fort Lauderdale, Florida. A red pin is placed on the map, and a pop-up box identifies it as 'Magnolia Warehouse' at 'Fort Lauderdale, FL 33312, United States'. The map includes various street names and landmarks like 'Westgate Lake Manor', 'Melrose Park', and 'Melrose Manors'. At the bottom of the map, there is a button labeled 'Open Selected Location'.

Maximum Flexibility to Build Products to Fit Your Business Needs

- Uses standard Salesforce® Product Object with additional fields
- Relate Vendor and Alternate Vendor Accounts
- Indicate Make or Buy plus Purchased Price
- Identify Product Family and Type (Product, Product Bundle, Component)
- Establish Quantity and Reorder Quantity
- Use the Product QR Code ability to scan by Product
- Maintenance & Lifecycle Related Lists allow tracking of revenue generating maintenance opportunities



Start Seeing Your Inventory with SoClo Inventory App

New Product

Product Information

• Product Name

Product Code

Vendor Account ⓘ

Alternate Vendor Account

Make or Buy

--None--

Purchased Price

Active

☐

Product Family

--None--

• Type

--None--

IsInventory

☐

Quantity

Reorder Quantity

Maintenance & Lifecycle

Maintenance Schedule (In Weeks)

Maintenance Notification (In weeks) ⓘ

Life Span (In weeks) ⓘ

Life Span Notification (In Weeks) ⓘ

Cancel

Save & New

Save

Maximum Flexibility to Build Products to Fit Your Business Needs

- Create Product Items to represent your inventory
- Each Product Item can be linked to a storage location and to a specific product
- Use Quantity to track inventory usage and restock as necessary
- Can be created with or without Serial Numbers



Start Seeing Your Inventory with SoClo Inventory App

New SoClo Product Item

Information

Product Item Name	Owner Rebecca Kendig
Product Name Search Products...	Location Name Search Locations...
Serial Number 	*Quantity
Product Bundle Search SoClo Product Bundles...	Quantity Unit Of Measure Each

Cancel Save & New Save

SoClo Inventory

Search Products and more...

Products

All Products

16 items • Sorted by Type • Filtered by All products • Updated 2 minutes ago

	Product Name	Active (Product)	IsInventory	Type
1	Motor	☐	☒	Component
2	Impeller	☒	☒	Component
3	Inlet Vanes	☒	☒	Component
4	Evaporator Drain Lines	☒	☒	Component
5	Coolant Lines	☒	☒	Component
6	Blower	☒	☒	Component
7	Evaporator Coil	☒	☒	Component
8	Cold Air Return Duct	☒	☒	Component
9	Filter	☒	☒	Component
10	Fan	☒	☒	Component
11	Condensor Coil	☒	☒	Component
12	Centrifugal Compressor	☒	☒	Product Bundle
13	Air Handler	☒	☒	Product Bundle
14	Condenser Unit	☒		
15	Split AC Unit	☒		

New SoClo Product Bundle

Information

* Product Bundle Name

Product

* Type

Serial Number

* Created Location

Description

Description

System Information

Owner Rebecca Kendig

Cancel Save & New Save

Build & Track Product Bundles to be Ready for Your Next Opportunity

- Create Product Bundles to prepare for assembly to manufacture your product
- Great path to capture maintenance kits
- Contents of a Product Bundle can also be sold separately as individual Components



Start Seeing Your Inventory with SoClo Inventory App

SoClo Inventory

SoClo Product Hierarchy

Product	Product Code	Quantity Required f...	Quantity Unit Of Me...	IsActive	IsInventory	Type
> Widget #1				✓	✓	Product
> Air Handler				✓	✓	Product Bundle
> Evaporator Coil		1		✓	✓	Component
> Filter		1		✓	✓	Component
> Blower		1		✓	✓	Component
> Condenser Unit				✓	✓	Product Bundle
> Fan		1		✓	✓	Component
> Condensor Coil		1		✓	✓	Component
> Centrifugal Com...		1		✓	✓	Product Bundle
> Split AC Unit				✓	✓	Product
> Centrifugal Compre...				✓	✓	Product Bundle
> Motor		1		✗	✓	Component
> Inlet Vanes		1		✓	✓	Component
> Impeller		1		✓	✓	Component

New SoClo Product Item

Information

Product Item Name

Product Name

Search Products...

Serial Number

Product Bundle

Search SoClo Product Bundles...

Owner

Lynn Grande

Location Name

Search Locations...

Quantity

Quantity Unit Of Measure

Each

Cancel Save & New Save

Type

Product

Show details

Make Product Bundle

Add Component

Delete All Components from Hierarchy

Build *Product Hierarchies* to Show Components of a System & Use *Product Item* to denote available Product

- Transform your current products to create Product Hierarchies to outline Components of a system
- Use Product Bundles and Components to represent the final assembled Product



Start Seeing Your Inventory with SoClo Inventory App

Generate Service Orders

- Generate Service Orders from an Opportunity or the Service Order tab
- Point & Click to fulfill Service Orders using:
 - Product Request:
 - Use when your stock gets low or your need a part for a particular Service Order
 - Specify when and where the parts are needed
 - Product Transfer:
 - Track the transfer of inventory between locations
 - Typically created in response to a Product Request, they do not have to be
 - Product Consumed:
 - Denotes when a particular part has been utilized
- Create Service Order to ship/deliver your Product or to identify a build

SoClo Inventory

SoClo Service Order SO-00000005

Related List Quick Links

- Product Required (4)
- Product Requests (0)
- Products Consumed (0)
- SoClo Product Item Transactions (0)
- SoClo Product Bundles (0)

Related Details

Product Required (4) New Display Product Hierarchy

Product Required Number	Product Required	Quantity Required	Available Quantity
PRN-000010	Air Handler	1.00	2.00
PRN-000011	Blower	1.00	0.00
PRN-000012	Evaporator Coil	1.00	0.00
PRN-000013	Filter	1.00	0.00

View All

Product Requests (0) New

Products Consumed (0) New

SoClo Product Item Transactions (0) New

SoClo Product Bundles (0) New

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

New SoClo Product Request

Information

Product Request Number

Account

Case

Service Order

Address

Owner

Status

Ship Type

Need By Date

Destination Location

Detail

Description

Cancel Save & New Save

New SoClo Product Consumed

Information

*Service Order

Product

*Product Item

*Quantity Consumed

Quantity Units Of Measure

Description

Description

Cancel Save & New Save



Start Seeing Your Inventory with SoClo Inventory App

Opportunity
salesforce.com - 1,000 Widgets

Account Name: salesforce.com | Close Date: 4/30/2019 | Amount: \$3,000.00 | Opportunity Owner: Lynn Grande

Activity: Details

Opportunity Owner	Lynn Grande	Amount	\$3,000.00
Opportunity Name	salesforce.com - 1,000 Widgets	Close Date	4/30/2019
Account Name	salesforce.com	Next Step	Close the deal!
Type	New Business	Stage	Negotiation/Review
Lead Source	Advertisement	Probability (%)	90%
		Primary Campaign Source	

Related

Products (1)

Air Handler

Quantity: 1.00
Sales Price: \$3,000.00
Date:

Service Orders (1)

SoClo Generate Service Order

Following Service Order(s) created from this Opportunity.

SO-00000005

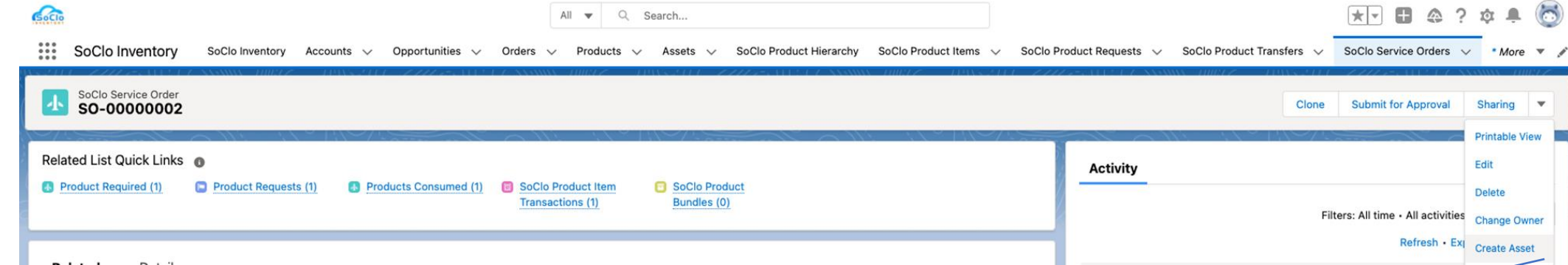
Finish

Generate Service Orders Directly From Opportunities

- One click directly from Opportunity to generate corresponding Service Orders

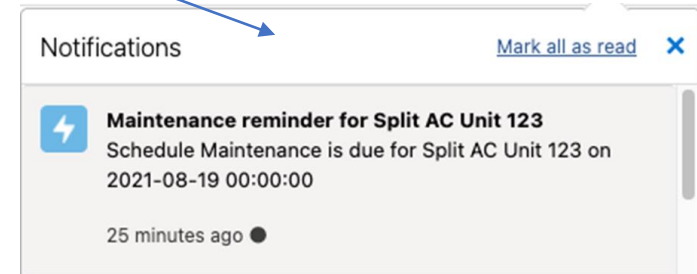
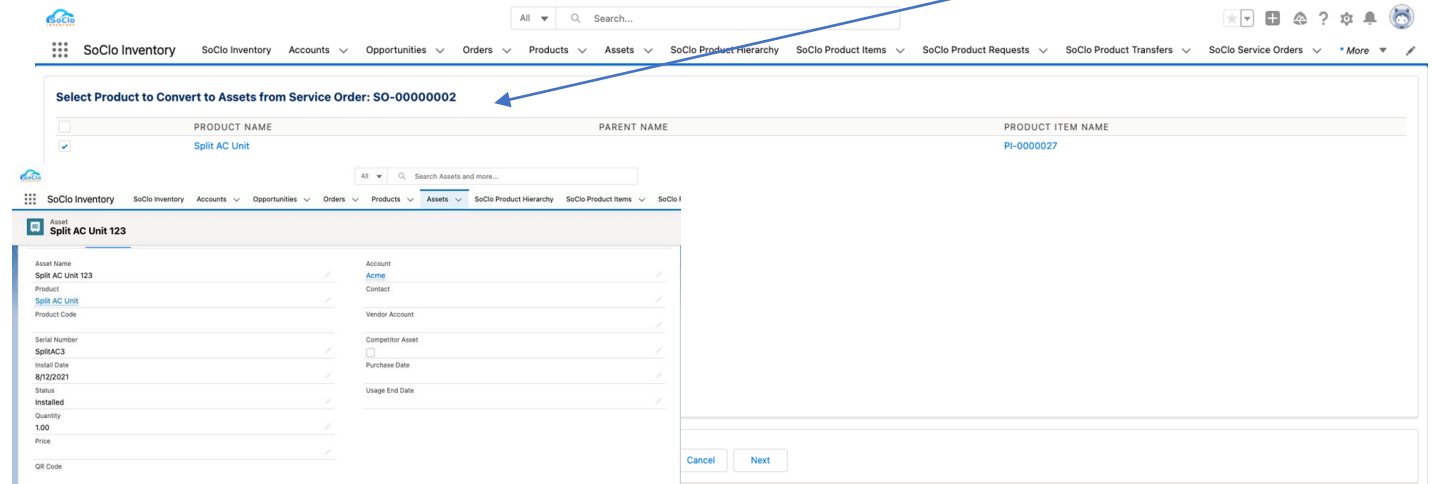


Start Seeing Your Inventory with SoClo Inventory App



Increase Revenue Opportunities through Asset Creation and Maintenance Notifications

- Create assets directly from SoClo Service Orders
- Generates Product QR Code linking to Asset record



Start Seeing Your Inventory with SoClo Inventory App