



Welcome to SoClo Inventory!!

The SoClo Inventory App gives you the ability to spend less time inventorying and more time doing business. Designed to give you the full flow of inventory from an opportunity to fulfillment order to an asset with features such as:

1. adding products/components
2. creating fulfillment orders to build products
3. requesting and transferring products/components as needed between locations
4. converting build products into assets
5. receiving inventory from a purchase order
6. tracking asset's service maintenance intervals and life cycle

Process Flow

Installation Steps

We recommend installing this application for Admins only and assign included Permission Sets to other users in your organization as required.

App Name	Publisher	Version Name	Version Number
SoClo Inventory	soclo inventory	SoClo Inventory v1.1.12	1.1 (Beta 12)

[Additional Details](#) [View Components](#)

Post Installation Steps [REQUIRED]

1. Create following Public Groups to receive custom notification to selected group of users
 - a) Label: SoClo Inventory Notification Group
 - i) Group Name: SoClo_Inventory_Notification_Group
 - ii) Add Public Groups or Users as members
 - a) Label: SoClo Maintenance Notification Group
 - iii) Group Name: SoClo_Maintenance_Notification_Group
 - iv) Add Public Groups or Users as member

Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in

View: All Edit Create New View

Action	Label ↑	Group Name
Edit Del	SoClo Inventory Notification Group	SoClo_Inventory_Notification_Group
Edit Del	SoClo Maintenance Notification Group	SoClo_Maintenance_Notification_Group

2. Assign Licenses to your users.
 - a) Go to setup->installed packages. You will see Manage Licenses next to SoClo Inventory. Add your users.
3. Assign Permission Sets to your users. We have added two permission sets:
 - a) SoClo Inventory Admin
 - i) It grants View All and Modify All permission for all SoClo Inventory Objects to assigned users.

- a) SoClo Inventory User
 - ii) It grants create, edit, view and View All permission for all SoClo Inventory Objects to assigned users.
 - a) You must also grant Create, Edit and Read permission for Products standard object to your users' profile.
 - b) You need to grant access to Opportunity field of Order object to your users' profile.
4. Create "WIP" as inventory location.
 5. Assign SoClo Page Layout to user profiles of following standard objects for best use of SoClo Inventory application.
 - a) Account
 - b) Asset
 - c) Location
 - d) Opportunity
 - e) Opportunity Product
 - f) Product
 - g) Order
 5. Create following Queues to create task for service maintenance
 - a) Label: SoClo Inventory Notification Queue
 - i) Supported Objects: Task
 - ii) Queue Members: Group: SoClo Inventory Notification Group
 - a) Label: SoClo Maintenance Notification Queue
 - iii) Supported Objects: Task
 - iv) Queue Members: Group: SoClo Maintenance Notification Group

Queues

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue that are allowed to retrieve records from the queue.

View: [All](#) [Edit](#) [Create New View](#)

Action	Label ↑	Queue Name	Queue Email	Supported Objects
Edit Del	SoClo Inventory Notification Queue	SoClo Inventory Notification Queue		Task
Edit Del	SoClo Maintenance Notification Queue	SoClo Maintenance Notification Queue		Task

6. Assign SoClo Compact Layout to following standard objects for best use of SoClo Inventory application.

- a) Product

SETUP > OBJECT MANAGER Product				
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets	Compact Layouts 2 Items, Sorted by Label Q Quick Find New Compact Layout Assignment			
	LABEL	API NAME	PRIMARY	MODIFIED BY
	SoClo Product Compact Layout	SoClo_Product_Compact_Layout	✓	Sulay Shah
	System Default	SYSTEM		12/8/2021, 6:35 PM

7. Update Search Layout of the Price Book Entry standard object to display available quantity while adding Product to Opportunities.
- a) Select “Price Book Entry” object from setup → Object Manager list
 - b) Select “Search Layout” and click edit “Default Layout” to update selected fields
 - c) Add “Quantity” from Available Fields to Selected Fields. Click Save

SETUP > OBJECT MANAGER

Price Book Entry

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Field Sets

Object Limits

Search Layouts

Search Layouts for Salesforce Classic

Validation Rules

Search Layouts

28 Items, Sorted by Profile

PROFILE	COLUMNS DISPLAYED
Default Layout	Product Name, Product Code, List Price, Product Description, Product Family, Quantity
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Chatter External User	Default Layout
Chatter Free User	Default Layout

Create Inventory Locations

Locations are places, like warehouses, customer sites, or anywhere inventory is stored. Create locations so you can track the items stored there and restock when necessary. **IMPORTANT: You must have created one location called WIP.**

1. Location Name and Location Type is required fields.
2. If you want to see these locations on the map, add Visitor Address on the location.

New Location

Information

* Location Name
Warehouse3

* Location Type
Warehouse

Description

Parent Location
Search Locations...

Visitor Address
Search Addresses...
+ New Address

Driving Directions

Location
Latitude
Longitude

System Information

Owner
Sulay Shah

Cancel Save & New Save

Create Product or Update existing product

1. Make sure to edit/enter new information in Detail tab.
 - a. If product is active, then select “Active” checkbox to true.
 - b. New “Type” attribute needs to be updated to one of following types:
 - i. Product
 - ii. Product Bundle
 - iii. Component
 - c. If you are not buying this product then update “Make or Buy” to Make otherwise Buy.
 - d. Enter Maintenance & Lifecycle Section. These attributes will be assigned to Assets whenever it is created. There will be notification generated when meet the criteria.
 - e. If you want to track inventory of this product then select “IsInventory” attribute to true

Edit Car

* Product Name
Car

Product Code
CR123123

Vendor Account
Search Accounts...

Alternate Vendor Account
Search Accounts...

Make or Buy
--None--

Purchased Price

Product QR Code

Active
☒

Product Family
--None--

*Type
Product

IsInventory
☒

Quantity

Reorder Quantity

Maintenance & Lifecycle

Maintenance Schedule (In Weeks)

Life Span (In weeks)

Maintenance Notification (In weeks)

Life Span Notification (In Weeks)

Cancel Save & New Save

Create SoClo Inventory Item Records to Represent Inventory

Inventory items represent your inventory. Each inventory item is linked to a storage location, and to a specific product, indicating the item being stored. Create inventory items so you can track inventory usage and restock when necessary.

- open "SoClo Inventory Item" in the Related tab
- Click on "New" on the SoClo Inventory Items section to add inventory for this product.
- Select Product Name, Location, Quantity. Enter serial number if product is tracked by it. When use serial number quantity of the product must be 1.

New SoClo Product Item

Information

Product Item Name

Product Name

Serial Number

Product Bundle

Owner

Location Name

* Quantity

Quantity Unit Of Measure

Floor Mates

Warehouse1

100

Each

Cancel

Save & New

Save

Create/Update SoClo Product Quantity Records for minimum required quantity

- Add SoClo Product Quantity record, if you like to be reminded on low quantity of the product per location. When you add product in the inventory, these records are created by default. Update Minimum Required Quantity attribute. User receives notification when product quantity goes below minimum required quantity.

Edit PL-00000000

Product Location Name

PL-00000000

* Product

* Minimum Required Quantity

Created By

Owner

Sulay Shah

* Location

Warehouse1

Available Quantity

50

This field is calculated upon save

Last Modified By

Sulay Shah, 5/13/2021, 1:54 PM

Cancel

Save & New

Save

SoClo Product Quantity						New	Change Owner	Printable View
All						Q Search this list...		
10 Items - Sorted by Product Location Name - Filtered by All soclo product quantity - Updated a few seconds ago								
	Product Location Name	Product	Location	Available Quantity Trigger	Minimum Required Quantity			
1	PL-00000000	Back Bumper	Warehouse1	50	25			
2	PL-00000001	Floor Mates	Warehouse1	100	75			
3	PL-00000002	Front Bumper	Warehouse1	100	75			
4	PL-00000003	Head Light Bulb	Warehouse1	50	25			
5	PL-00000004	Headlight Housing	Warehouse1	50	25			
6	PL-00000005	Leather Seat	Warehouse1	75	50			
7	PL-00000006	Splash Guard	Warehouse1	100	75			
8	PL-00000007	Tailgate Bulb	Warehouse1	100	75			
9	PL-00000008	Tailgate Bulb	Warehouse2	50	25			
10	PL-00000009	Front Bumper	Warehouse2	50				

Create Product Hierarchy

User can create product hierarchy here to template what contains in the product. This is for the customer who manufactures their own product using sub assembly. There is no need to create product hierarchy if your company is a reseller. We have three levels of the product based on their type. Product can have Product Bundle and Components as their children. Product Bundle can have components as their children. Components cannot be parent.

Please follow steps below to create hierarchy.

- Select “SoClo Product Hierarchy” tab
- Select action menu on the right side for each product to add “Product Bundle/Component” as its children.

☐ Product	Product Code	Quantity Required for Package	Quantity Unit Of Measure	IsActive	IsInventory	Type
☐ > Exterior Assembly	EXT123			✓	✓	Product Bundle
☐ > Car	CR123123			✓	✓	Product
☐ > Head Light Assembly	HEAD123			✓	✓	Product Bundle
☐ > Tailgate Light Assembly	TLA123			✓	✓	Product Bundle
☐ > Interior Assembly	INT123			✓	✓	Product Bundle

☐ Product	Product Code	Quantity Required for Package	Quantity Unit Of Measure	IsActive	IsInventory	Type
☐ > Exterior Assembly	EXT123			✓	✓	Product Bundle
☐ > Car	CR123123			✓	✓	Product
☐ > Head Light Assembly	HEAD123			✓	✓	Product Bundle
☐ > Tailgate Light Assembly	TLA123			✓	✓	Product Bundle
☐ > Interior Assembly	INT123			✓	✓	Product Bundle

Search Components

Product Name

Product Code

Search

Select Components to add into Car

PRODUCT NAME	PRODUCT CODE
☐ Back Bumper	BB123
☒ Exterior Assembly	EXT123
☐ Floor Mats	FM123
☐ Front Bumper	FB123
☒ Head Light Assembly	HEAD123
☐ Head Light Bulb	HEADBULB123
☐ Headlight Housing	HEADHOUSE123
☒ Interior Assembly	INT123
☐ Leather Seat	LS123
☐ Splash Guard	SG123
☐ Tailgate Bulb	TB123
☐ Tailgate Bulb Housing	TBH123
☒ Tailgate Light Assembly	TLA123

Cancel

Next

- Select product bundle/component to add to the selected product and click next.

Selected Components

PRODUCT	COMPONENT	QUANTITY REQUIRED
Car	Exterior Assembly	*
Car	Head Light Assembly	*
Car	Interior Assembly	*
Car	Tailgate Light Assembly	*

Product

Product Name

Tailgate Light Assembly

Type

Product Bundle

View

Edit

Previous

Cancel

Save

- Select the quantity required to make this product and click Save.
- It will take you back to the product hierarchy tab.
- Expand selected product to see its children

SoClo Product Hierarchy							
☐ Product	Product Code	Quantity Required for Package	Quantity Unit Of Measure	IsActive	IsInventory	Type	
☐ > Exterior Assembly	EXT123			✓	✓	Product Bundle	▼
☐ > Car	CR123123			✓	✓	Product	▼
☐ > Tailgate Light Assembly	TLA123	1		✓	✓	Product Bundle	▼
☐ > Exterior Assembly	EXT123	1		✓	✓	Product Bundle	▼
☐ > Head Light Assembly	HEAD123	1		✓	✓	Product Bundle	▼
☐ > Interior Assembly	INT123	1		✓	✓	Product Bundle	▼
☐ > Head Light Assembly	HEAD123			✓	✓	Product Bundle	▼
☐ > Tailgate Light Assembly	TLA123			✓	✓	Product Bundle	▼
☐ > Interior Assembly	INT123			✓	✓	Product Bundle	▼

- The same way we can add components to Product Bundle.

☐ > Car	CR123123			✓	✓	Product	▼
☐ > Interior Assembly	INT123	1		✓	✓	Product Bundle	▼
☐ > Leather Seat	LS123	4		✓	✓	Component	▼
☐ > Floor Mats	FM123	3		✓	✓	Component	▼
☐ > Head Light Assembly	HEAD123	1		✓	✓	Product Bundle	▼
☐ > Head Light Housing	HEADHOUSE123	1		✓	✓	Component	▼
☐ > Head Light Bulb	HEADBULB123	1		✓	✓	Component	▼
☐ > Tailgate Light Assembly	TLA123	1		✓	✓	Product Bundle	▼
☐ > Tailgate Bulb Housing	TBH123	1		✓	✓	Component	▼
☐ > Tailgate Bulb	TB123	1		✓	✓	Component	▼
☒ > Exterior Assembly	EXT123	1		✓	✓	Product Bundle	▼
☐ > Back Bumper	BB123	1		✓	✓	Component	▼
☐ > Front Bumper	FB123	1		✓	✓	Component	▼
☐ > Splash Guard	SG123	4		✓	✓	Component	▼

- Users have different options on this page to delete hierarchy, edit hierarchy, show details of product, etc.
- This is the way we provide customers to create product template.

Create Purchase Order

When your stock gets low in all warehouses, create a SoClo Purchase Order. The purchase order can be associated with Vendors and recipients. You can specify the required date and terms when creating PO. You need to specify the information of products needed in separate line items that each represent a needed product. You can also log received Items from each line item or from purchase order. You can create inventory from the received items as it come from vendor.

You can create Purchase Order form two places. You can create from SoClo Inventory Item object and from SoClo Purchase Orders tab.

Create from SoClo Purchase Orders Tab

- From the SoClo Purchase Orders tab, click New.
- Enter necessary information like Terms, Order Date, Required Date, etc..
- Enter Vendor Information and recipient information as required.
- Add Note and Shipping information
- Save you changes.

New SoClo Purchase Order

Information

Purchase Order Number

Order Date: 4/19/2022

Required Date: 5/9/2022

F.O.B. ☐

Owner: Sulay Shah

Terms: Due on receipt

Ship Via: Fed Ex

Status: Draft

Vendor Information

Vendor Account: Search Accounts...

Recipient: Search Contacts...

Totals

S&H: \$0.00

Discount: \$0.00

Tax: \$0.00

Additional Information

Notes

Cancel Save & New Save

- Create a SoClo Purchase Order Item for each product needed.
- From the SoClo Purchase Order Item related list, click **New**.
- Select the product that is needed and enter a quantity and unit of measure. Also, enter the location where you want to receive the product.
- Fill in the rest of the fields as needed.
- Save your changes.
- User can create purchase order pdf and send it to their vendors.

New SoClo Purchase Order Item

Information

Purchase Order Item Name

Unit Cost

Purchase Order: PC-0000000003

Location: Location A

Product Details

Product: Seat

Quantity: 50.00

Item Number

Unit: Each

Cancel Save & New Save

- Create one or multiple SoClo Purchase Order Items Received for each product order items received.
- Open the SoClo Purchase Order Item that is received by warehouse personal.
- Click **Log Received Items** to enter the Received Date and Received Quantity. We do allow to receive partial quantity.
- Click **Next** to save records.
- Once all the quantity received for that product, user gets all the items received for this product message.
- We do allow to receive products from Purchase Order where user can enter receive information of each product in separate screen. Click on **Next** button takes user to another product.

Log Received Items

Product : **Seat**
Quantity Ordered : **50**
Quantity Already Fulfilled : **30**

* Fulfillment Date
Apr 19, 2022

* Fulfillment Quantity

Next

Log Received Items

Product : **AL00027 Flowmeter, Water, 11 GPH**
Quantity Ordered : **30**
Quantity Already Fulfilled : **0**

☐ Skip This Product

* Fulfillment Date
Apr 19, 2022

* Fulfillment Quantity

Previous Next

- User has option to create inventory from SoClo Purchase Order Item Received record.
- Open the SoClo Purchase Order Item Received product screen. Click **Create Inventory**.
- You can specify that of this product is tracked by serial number or not.
- If Yes, It asks user to enter serial number for the received quantity for that product. It creates separate record in the inventory item for that product with selected serial number.
- If No, it creates a inventory item with received quantity for that received location and selected vendor.
- Click Next to save record or enter serial number for each product.

Create Inventory

Will this SoClo Inventory item be tracked by serial number?

* Serialized
☒ Yes
☐ No

Next

Create Inventory

These items are serialized, please enter a serial number for each of these items.

Seat
1 of 30

* Serial Number

Next

Create Purchase Order from SoClo Inventory Item Record

- Open SoClo Inventory Item record to create Purchase Order from the SoClo Inventory Items tab.
- Click **Create Purchase Order**
- Product and Location information will be auto populate from inventory item.

- User needs to fill out Order Date, Required Date, Terms, Shipping information and quantity to order.
- Click **Next** to create Purchase Order with Purchase Order Item record for that product.
- Newly created Purchase Order will be open after save.

Create Purchase Order

Purchase Order Information

Order Date

Required Date

☐ F.O.B.

Terms

--None--

Ship Via

--None--

Purchase Order Item Information

* Product

Seat

X

* Location

Location A

X

* Quantity

Next

Inventory Request Inventory

When your stock gets low or you need a part for a particular fulfillment order, create a SoClo Inventory Request. Inventory requests can be associated with fulfillment orders, cases, and accounts. You can specify when and where the parts are needed and divide the request into line items that each represent a needed part.

- From the SoClo Inventory Requests tab, click New.
- If the request is being made for a particular job, select the related Fulfillment Order.
- Optionally, select the related account or case.
- Enter the destination location, which is where the parts are needed.
- Enter the address where the parts should be shipped; for example, the mailing address of the warehouse that is requesting them.
- Select a shipment speed and enter the Need By Date.
- Add a description.
- Assign the inventory request a status:
 - Draft: Finalizing the inventory request details.
 - Submitted: The inventory request is ready for processing.
 - Received: The department in charge of fulfilling the request is working on it.
- Save your changes.

New SoClo Product Request

Information

Product Request Number

Account

Acme

Case

Search Cases...

Service Order

Search SoClo Service Orders...

Address

Search Addresses...

Owner

Sulay Shah

Status

Draft

Shipment Type

Rush

Need By Date

Date

5/20/2021

Time

12:00 PM

Destination Location

Warehouse1

Detail

Description

Cancel

Save & New

Save

- Create one SoClo Inventory Request Line Item for each product needed.
- From the Inventory Request Line Items related list, click **New**.
- Select the product that is needed and enter a quantity and unit of measure. These values are inherited from the Quantity Unit of Measure field on products.
- If the parts are being transferred from another location such as a warehouse, enter the source location.
- Fill in the rest of the fields as needed.
- Save your changes.

New SoClo Product Request Line Item

Information

Product Request Line Item Number

Product

Tallgate Bulb

Quantity Requested

10.00

Quantity Unit Of Measure

Each

Description

Parent

PR-0000000

Status

Draft

Need By Date

Date

5/20/2021

Time

12:00 PM

Shipping Information

Source Location

Warehouse1

Shipment Type

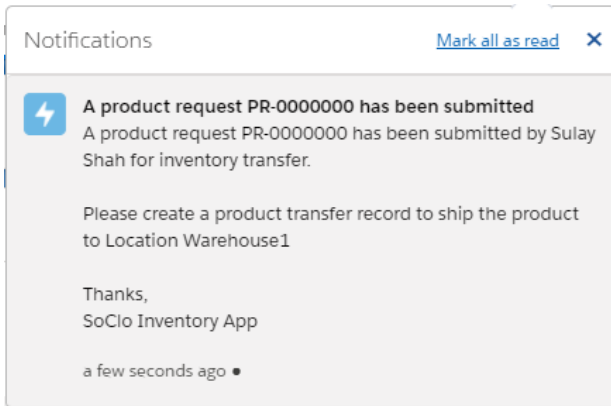
Rush

Cancel

Save & New

Save

- When Inventory Request is ready for processing, update the status of SoClo Inventory Request to *Submitted*.
- As soon as status has been updated to Submitted, custom notification has been generated for the selected user in custom notification group.



Once Inventory Request has been received by responsible person, the status needs to be updated as Received and inventory transfers are typically created in response to a inventory request.

SoClo Inventory Transfer Inventory

Inventory transfers track the transfer of inventory between locations. While inventory transfers are typically created in response to a inventory request, they do not have to be. You can create a series of inventory transfers to track the initial stocking of their service vehicle.

If the SoClo Inventory transfer is fulfilling a SoClo Inventory request, create one inventory transfer for each inventory request line item. This way, you can track the status of each part being requested. The Inventory Transfers related list on a inventory request lists all inventory transfers associated with the request's line items. In addition, inventory request line items have their own Inventory Transfers related list that shows related transfers.

- From SoClo Inventory Transfer tab or related list of SoClo Inventory Request Line Items, click New.
- If Inventory Transfer records is created for inventory request line item, most of the fields are populated from Inventory request.
- You need to select which Inventory Item you want to transfer from source location to destination location.
- Save your changes.
- You might need to refresh the inventory request line item if it is created from there.

New Product Transfer
New SoClo Product Transfer

Information

Product Request Line Item

PRLI-0000000

Product Name

Tailgate Bulb

Quantity Sent *

10.00

Source Product Item *

PI-0000009

Received

☐

Quantity Received

Description

Product Request

PR-0000000

Quantity Unit Of Measure

Each

Destination Location

Warehouse1

Received By

Cancel

Save



Related

Details



Product Transfers (1)

New

Product Transfer Number	Source Product Item	Quantity Sent	Received
PT-0000000	PI-0000009	10.00	☐
View All			

Once inventory transfer is shipped, you need to select the status of the transfer to shipped or ready for pickup. When the status is changed, custom notification will be created for selected inventory management group.



A product transfer PT-0000001 is Ready.

A product transfer PT-0000001 has been submitted by Sulay Shah.

Please check "received" when you receive the transferred product.

Thanks,
SoClo Inventory App

a few seconds ago •

Selecting **Received** on a SoClo inventory transfer indicates that the items have been added to the inventory at their destination location. Marking a inventory transfer prompts the following actions.

1. Inventory items are updated or created.
 - i) If there's already a inventory item that represents the transferred products stored at the destination location, the quantity of that inventory item is increased to reflect the transfer.
 - ii) If such a inventory item doesn't exist (in other words, if it's the first time that the product is being stored at the location), a inventory item is automatically created that reflects the quantity transferred there.
2. Inventory item transactions are created.
 - i) When you mark a transfer received, a inventory item transaction with a type of "Transferred" is created to represent the addition of stock at the destination location. If a source location or source inventory item is specified, a second transaction is created to represent the removal of stock from the source location. The first transaction's quantity is positive because stock is being added; the second transaction's quantity is negative. These transactions appear in the Inventory Item Transactions related list on the related inventory transfer, source inventory item, and destination inventory item. They let you quickly review past transactions at your inventory locations.

Related

Details

Product Transfers (1)

New

Product Transfer Number	Source Product Item	Quantity Sent	Received
PT-0000000	PI-0000009	10.00	
View All			

Edit

Delete

Return Order Line Items (0)

New

Edit PT-0000000

Product

Tailgate Bulb

X

Quantity Sent

10.00

Source Product Item

PI-0000009

X

Received

✓

Quantity Received

10.00

QuantityUnitOfMeasure

Each

Destination Location

Warehouse1

X

Status

Draft

Shipment

Search SoClo Shipments...

Received By

Sulay Shah

X

Description

Description

Created By

Sulay Shah, 5/13/2021, 10:07 PM

Last Modified By

Sulay Shah, 5/13/2021, 10:07 PM

Cancel

Save & New

Save

Inventory count has been updated after inventory transfer is completed.

SoClo Product Items

Recently Viewed

New Import Change Owner

11 Items - Updated a few seconds ago

Q Search this list...

⚙️ ⌵ ↺ ✎ 🔄 ⌵

	Product Item Name	Product Name	Location Name	Quantity	Serial Number	Product Bundle
1	☐ PI-0000009	Tailgate Bulb	Warehouse2	10.00		
2	☐ PI-0000010	Front Bumper	Warehouse2	50.00		
3	☐ PI-0000008	Tailgate Bulb Housing		50.00		
4	☐ PI-0000007	Tailgate Bulb	Warehouse1	110.00		
5	☐ PI-0000006	Splash Guard	Warehouse1	100.00		
6	☐ PI-0000005	Leather Seat	Warehouse1	75.00		
7	☐ PI-0000004	Head Light Housing	Warehouse1	50.00		
8	☐ PI-0000003	Head Light Bulb	Warehouse1	50.00		
9	☐ PI-0000002	Front Bumper	Warehouse1	100.00		
10	☐ PI-0000001	Floor Mats	Warehouse1	100.00		
11	☐ PI-0000000	Back Bumper	Warehouse1	50.00		

Product Transaction with quantity +10 has been created for the product located at destination location.

 SoClo Product Item
PI-0000007

Product Name
[Tailgate Bulb](#)

Location Name
[Warehouse1](#)

Quantity
110.00

Serial Number

Product Bundle

Related

Details

 **Product Item Transactions (2)**

Product Item Transaction Number	Quantity	Transaction Type	Last Modified Date
T-0000011	10.00	Transferred	5/13/2021, 10:18 PM
T-0000007	100.00	Replenished	5/13/2021, 2:05 PM

View All

 **Products Consumed (0)**

New

Product Transaction with quantity -10 has been created for the product located at source location.

 SoClo Product Item
PI-0000009

Product Name
[Tailgate Bulb](#)

Location Name
[Warehouse2](#)

Quantity
40.00

Serial Number

Product Bundle

Related

Details

 **Product Item Transactions (2)**

Product Item Transaction Number	Quantity	Transaction Type	Last Modified Date
T-0000012	-10.00	Transferred	5/13/2021, 10:18 PM
T-0000009	50.00	Replenished	5/13/2021, 2:14 PM

View All

 **Products Consumed (0)**

New

If a inventory transfer has not yet been marked received, you can edit it normally. Received transfers cannot be updated, but you can delete them if needed. When you delete a transfer:

- The Quantity on Hand of the source and destination inventory items reverts to the pre-transfer quantity.
- Inventory item transactions with a transaction type of Adjusted are added to the source and destination inventory items.

Make Product/Product Bundle

You may have product bundle like assembly to manufacture your product. Sometime, user make product or product bundle keep it ready for upcoming opportunity. We have provided ways to make product/product bundle and allow user to select component at the warehouse to build that product. We consumed the parts/components has been used to build this product. Consumed means, we reduced the quantity of used parts at that location. We also add this product to inventory as inventory item.

Create Product Bundle

New SoCo Product Bundle - Head Light Assembly

Enter Product Bundle Information

Name *

Toyota Head Light Assembly

Type *

Product Bundle

Create Location *

Warehouse1

Description

Product *

Head Light Assembly

Serial Number

Cancel

Next

Create Product Bundle

creating product bundle for - Head Light Assembly

Please verify all the required components are available at the Product Bundle create location. Following products will be used to create Product Bundle.

PRODUCT NAME	PRODUCT CODE	DESTINATION LOCATION	QUANTITY REQUIRED	QUANTITY AT DESTINATION LOCATION	QUANTITY AVAILABLE
Head Light Bulb	HEADBULB123	Warehouse1	1	50.00	50
Head Light Housing	HEADHOUSE123	Warehouse1	1	50.00	50

Previous

Cancel

Next

Create Product Bundle

creating product bundle for - Head Light Assembly

Selected required product to create Product Bundle

PRODUCT NAME	PRODUCT CODE
Head Light Bulb	HEADBULB123

Head Light Bulb Inventory Information

PRODUCT NAME	PRODUCT ITEM	LOCATION	QUANTITY REQUIRED	QUANTITY ON HAND	SERIAL NUMBER	QUANTITY USED	QUANTITY UNIT OF MEASURE
☒	Head Light Bulb	PI-0000003	Warehouse1	1	50.00	1	--None--

Head Light Housing	HEADHOUSE123
--------------------	--------------

Head Light Housing Inventory Information

PRODUCT NAME	PRODUCT ITEM	LOCATION	QUANTITY REQUIRED	QUANTITY ON HAND	SERIAL NUMBER	QUANTITY USED	QUANTITY UNIT OF MEASURE
☒	Head Light Housing	PI-0000004	Warehouse1	1	50.00	1	--None--

[Previous](#) [Cancel](#) [Save](#)



SoClo Product Bundle

Toyota Head Light Assembly

Related

Details

Product Bundle Name

Toyota Head Light Assembly

Product

[Head Light Assembly](#)

Type

Product Bundle

Serial Number

Created Location

[Warehouse1](#)

▼ Description

Description

Owner

[Sulay Shah](#)

Last Modified By

[Sulay Shah](#), 5/13/2021, 11:03 PM

Created By

[Sulay Shah](#), 5/13/2021, 11:03 PM



SoClo Product Bundle

Toyota Head Light Assembly

Related

Details



SoClo Product Bundle Items (2)

[New](#)

Product Bundle Item Number	Product	Product Item	Quantity
PBI-0000000	Head Light Bulb	PI-0000003	1
PBI-0000001	Head Light Housing	PI-0000004	1

[View All](#)

Product Inventory Snapshot after Product Bundle has been made at warehouse1.

SoClo Product Items Recently Viewed 12 items - Updated a few seconds ago Q Search this list... ⚙ 📄 ↺ ✎ 🔍						
☐	Product Item Name	Product Name	Location Name	Quantity	Serial Number	Product Bundle
1	☐ PI-0000011	Head Light Assembly	Warehouse1	1.00		Toyota Head Light Assembly
2	☐ PI-0000004	Head Light Housing	Warehouse1	49.00		
3	☐ PI-0000003	Head Light Bulb	Warehouse1	49.00		
4	☐ PI-0000007	Tailgate Bulb	Warehouse1	100.00		
5	☐ PI-0000009	Tailgate Bulb	Warehouse2	50.00		
6	☐ PI-0000010	Front Bumper	Warehouse2	50.00		
7	☐ PI-0000008	Tailgate Bulb Housing		50.00		
8	☐ PI-0000006	Splash Guard	Warehouse1	100.00		
9	☐ PI-0000005	Leather Seat	Warehouse1	75.00		
10	☐ PI-0000002	Front Bumper	Warehouse1	100.00		
11	☐ PI-0000001	Floor Mats	Warehouse1	100.00		
12	☐ PI-0000000	Back Bumper	Warehouse1	50.00		

Product transaction has been created for each parts/component has been used to make this product/product bundle.

SoClo Product Item

PI-0000004

Product Name

Head Light Housing

Location Name

Warehouse1

Quantity

49.00

Serial Number

Product Bundle

Related

Details

Product Item Transactions (2)

Product Item Transaction Number	Quantity	Transaction Type	Last Modified Date
T-0000017	-1.00	Consumed	5/13/2021, 11:03 PM
T-0000004	50.00	Replenished	5/13/2021, 2:04 PM

View All

Products Consumed (0)

New

If you do not have all the parts/components at the location where you are making product, it does not allow you to make product bundle. It gives following error.

Create Product Bundle

creating product bundle for - Tailgate Light Assembly

There are one or more products are missing at the Prouct Bundle location. Make sure you have all the products available to create Product Bundle.

PRODUCT NAME	PRODUCT CODE	DESTINATION LOCATION	QUANTITY REQUIRED	QUANTITY AT DESTINATION LOCATION	QUANTITY AVAILABLE
Tailgate Bulb	TB123	Warehouse1	1	100.00	150
Tailgate Bulb Housing	TBH123	Warehouse1	1	0.0	50

Previous

Close

In this case, inventory request and inventory transfer need to be done between locations.

Create Opportunities

We use salesforce standard feature for the sales process. We use opportunities alone for this process. In Salesforce, an opportunity moves through a series of stages linked to type of tasks being performed. You can use your own opportunity stage values to track progress.

- From Opportunities tab, click **New**.
- Enter opportunity name, account name, and close date for opportunity.
- Save changes.

New Opportunity

Opportunity Information

Opportunity Owner
Sulay Shah

Amount

* Opportunity Name
Toyota Car Sale

* Close Date
5/31/2021

Account Name
Acme

Next Step

Type
Existing Business

* Stage
Prospecting

Lead Source
--None--

Probability (%)
10%

Primary Campaign Source
Search Campaigns...

Additional Information

Tracking Number

Description Information

Description

Cancel Save & New Save

You can add products to opportunities using “Add Products” button. This is standard ways to add products. Products must be added to Price Book before you can add them to the Opportunities.

Opportunity
Toyota Car Sale

+ Follow Clone Edit SoClo Generate Service Order SoClo Generate Order Sharing Delete

Account Name: Acme Close Date: 5/31/2021 Amount: Opportunity Owner: Sulay Shah

Prospecting Qualification Needs Analysis Value Proposition 3d Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Mark Stage as Complete

Activity Details

Email

Write an email...

Compose

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.

Related

Products (0)

Add Products
Choose Price Book
SoClo Choose Price Book

Service Orders (0)

Notes & Attachments (0)

Upload Files
Or drag files

Contact Roles (0)

Add Products
Price Book: Standard Price Book

Product	Product ID	Price
Car	CR123123	\$10,000.00

Opportunity
Toyota Car Sale

Account Name: [Acme](#)
 Close Date: 9/31/2021
 Amount: \$10,000.00
 Opportunity Owner: [Suley Shah](#)

Prospecting
Qualification
Needs Analysis
Value Proposition
Identify Decision Makers
Perception Analysis
Proposal/Price Quote
Negotiation/Review
Closed

Activity
Details

Filters: All time - All activities - All types

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.

Related

Products (1)

Car
Quantity: 1.00
Sales Price: \$10,000.00
Date:

Service Orders (0)

Notes & Attachments (0)

At any stage of the Opportunity, user has option to create SoClo Fulfillment Order from this opportunity. There is a button “SoClo Generate Fulfillment Order”.

Create SoClo Fulfillment Order

SoClo Fulfillment Order is the central object used to track specific tasks required to be performed in order to complete Fulfillment Order. It could be shipping the product to customer, maintenance required on asset, installed product on the customer site.

- From top action buttons of the opportunity record page, click **SoClo Generate Fulfillment Order**.
- We create Fulfillment Order for each Opportunity and add opportunity products as product required in Fulfillment Order.
- You will be redirected to Fulfillment Order created for the opportunity.
- You will receive error message if Fulfillment Order is already created for this opportunity.

SoClo Inventory

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Opportunity

Pyramid Emergency Generators

Clone

Edit

SoClo Generate Fulfillment Order

SoClo Generate Order

Sharing

Delete

Account Name

Pyramid Construction Inc.

Close Date

7/28/2018

Amount

\$20,000.00

Opportunity Owner

Lynn Grande

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quote

Negotiation/Review

Closed

Mark Stage as Complete

Activity

Details

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.

Related

Products (1)

Car

Quantity: 1.00

Sales Price: \$20,000.00

Date:

View All

SoClo Generate Fulfillment Order

We cannot create a fulfillment order.

Fulfillment order [SO-00000751] is already created from this opportunity.

Finish

You will also receive notification of Fulfillment Order is generated for opportunity. This will help next person in charge to start preparing for fulfillment order completion.

Notifications [Mark all as read](#) ✕

⚡

Fulfillment Order FO-00001029 is Created
A Fulfillment Order FO-00001029 has been submitted by Sulay Shah
a minute ago •

⚡

Fulfillment Order FO-00000983 is Created
A Fulfillment Order FO-00000983 has been submitted by Sulay Shah
Apr 14, 2022, 2:23 AM •

SoClo Fulfillment Order FO-00001029

Buttons: Required Component List, Extract Product Bundle(s), Inventory Transfer, Create Product Bundle(s), Consume Inventory

Related List Quick Links

- SoClo Product Required (3)
- SoClo Product Bundles (3)
- SoClo Inventory Transfers (5)
- SoClo Inventory Consumed (0)
- SoClo Inventory Item Transactions (10)
- SoClo Inventory Requests (0)
- Assets (0)

Details

Fulfillment Order Number: FO-00001029
Order: [blank]
Owner: Sulay Shah
Priority: [blank]

SoClo Product Required (3)

PR-000412
Product Required: Car
Quantity Required: 1.00
Available Quantity: 1.00

To complete the fulfillment order, you need to select the build/work location. You may need to create product bundle(s) to make product required of FO based on the product hierarchy created for that product.

In this example, we need to make Car to fulfill this order. The car is product required for this FO. We have created product hierarchy for the Car. Hence, to make Car, we need to create “Interior Assembly” and “External Assembly” which are product bundles.

☐	Car	CarMain		✓	✗	Product
☐	Car Interior Assembly	CIA	1	✗	✗	Product Bundle
☐	Seat		4	✓	✗	Component
☐	Car Mats	CAR_MAT	5	✓	✗	Component
☐	Car Exterior Assembly	CAR_EA	1	✓	✗	Product Bundle
☐	Car Back Bumper	CAR_BB	1	✓	✗	Component
☐	Front Bumper	CAR_FB	1	✓	✗	Component
☐	Headlights	HEAD	2	✓	✗	Component

Car Product Hierarchy

You will have ability to see the required component list to make car. Click “Required Component List” button on the fulfillment order to see the required component list. You have option to download this report in the excel. This is only required if you are selling products those need to be made in your warehouse.

SoClo Fulfillment Order FO-00001029

Buttons: Required Component List, Extract Product Bundle(s), Inventory Transfer, Create Product Bundle(s), Consume Inventory

Related List Quick Links

- SoClo Product Required (3)
- SoClo Product Bundles (3)
- SoClo Inventory Transfers (5)
- SoClo Inventory Consumed (0)
- SoClo Inventory Item Transactions (10)
- SoClo Inventory Requests (0)
- Assets (0)

Details

Fulfillment Order Number: FO-00001029
Order: [blank]
Owner: Sulay Shah
Priority: [blank]

SoClo Product Required (3)

PR-000412
Product Required: Car
Quantity Required: 1.00
Available Quantity: 1.00

To complete the fulfillment order, we have created multi step process to make it easier for the user.

1. Extract Product Bundle(s)

In this step, we extract all the product bundles needed to create main required product. In this example, we have extracted “Interior Assembly” and “Exterior Assembly”. After this step, you will see the addition to the list of products required. You will need to make all these bundles/products to fulfill the order.

The screenshot shows the SoClo Fulfillment Order interface for order FO-00001029. The top navigation bar includes links for SoClo Inventory, SoClo Short Cuts, SoClo Quick Setup, Accounts, Opportunities, Orders, Products, Assets, SoClo Product Hierarchy, SoClo Inventory Items, and SoClo Fulfillment Orders. The main header has tabs for Required Component List, Extract Product Bundle(s) (highlighted with a green arrow), Inventory Transfer, Create Product Bundle(s), and Consume Inventory. Below the header, there are related quick links for SoClo Product Required (3), SoClo Product Bundles (3), SoClo Inventory Transfers (5), SoClo Inventory Consumed (0), SoClo Inventory Item Transactions (10), SoClo Inventory Requests (0), and Assets (0). A progress bar shows the order status: New, Scheduled, Assigned, In Progress, and Completed. The details section on the left lists Fulfillment Order Number (FO-00001029), Order, Owner (Sulay Shah), and Priority. The right panel shows 'SoClo Product Required (3)' with a list of products: PR-000412 (Car, 1.00), PR-000415 (Car Interior Assembly, 1.00), and PR-000416 (Car Exterior Assembly, 1.00).

The screenshot shows the SoClo Fulfillment Order interface for order FO-00001029. The top navigation bar is the same as the previous screenshot. The main header has tabs for Required Component List, Extract Product Bundle(s), Inventory Transfer (highlighted with a green arrow), Create Product Bundle(s), and Consume Inventory. Below the header, there are related quick links for SoClo Product Required (3), SoClo Product Bundles (3), SoClo Inventory Transfers (5), SoClo Inventory Consumed (0), SoClo Inventory Item Transactions (10), SoClo Inventory Requests (0), and Assets (0). A progress bar shows the order status: New, Scheduled, Assigned, In Progress, and Completed. The details section on the left lists Fulfillment Order Number (FO-00001029), Order, Owner (Sulay Shah), Priority (Low), Status (New), Location (Build Location), Account (Pyramid Construction Inc.), Opportunity (Pyramid Emergency Generators), and Dates (Start Date: 4/19/2022 3:59 PM, Ship Date Actual). The right panel shows 'SoClo Product Required (3)' with a list of products: PR-000412 (Car, 1.00), PR-000415 (Car Interior Assembly, 1.00), and PR-000416 (Car Exterior Assembly, 1.00). A 'View All' link is visible at the bottom of the right panel.

2. Inventory Transfer

In previous step, we have determined what product bundles need to be created. To make this product bundles we need to have inventory to the fulfillment location where you assemble the products. This step allows you to transfer inventories to WIP (work in progress)/fulfillment location. This means, we reserve the inventory to make products to fulfill the order.

The screenshot shows the SoClo Fulfillment Order interface for order FO-00001029. The top navigation bar is the same as the previous screenshot. The main header has tabs for Required Component List, Extract Product Bundle(s), Inventory Transfer (highlighted with a green arrow), Create Product Bundle(s), and Consume Inventory. Below the header, there are related quick links for SoClo Product Required (3), SoClo Product Bundles (3), SoClo Inventory Transfers (5), SoClo Inventory Consumed (0), SoClo Inventory Item Transactions (10), SoClo Inventory Requests (0), and Assets (0). A progress bar shows the order status: New, Scheduled, Assigned, In Progress, and Completed. The details section on the left lists Fulfillment Order Number (FO-00001029), Order, Owner (Sulay Shah), and Priority. The right panel shows 'SoClo Product Required (3)' with a list of products: PR-000412 (Car, 1.00), PR-000415 (Car Interior Assembly, 1.00), and PR-000416 (Car Exterior Assembly, 1.00).

You need to pick the destination location to transfer the inventory to. It picks inventory from another location and transfer it to destination location. In case you don't have components in stock, then if you have selected to create shortage, it creates shortage of required quantity in the inventory item. You can choose to create purchase order from that inventory item.

Create Fulfillment Order Product Transfer

New SoCo Inventory Transfer

Enter Inventory Transfer Information

Fulfillment OrderFO-00001029

Destination LocationBuild Location

Create Inventory Shortage☒

Cancel

Next

Fulfillment Order Inventory Transfer Details

PRODUCT NAME	PRODUCT CODE	DESTINATION LOCATION	QUANTITY REQUIRED	QUANTITY TRANSFERRED	QUANTITY TO TRANSFER	QUANTITY AVAILABLE	QUANTITY SHORTAGE
Seat		Build Location	4.00	0	4.00	310	0
Car Mats	CAR_MAT	Build Location	5.00	0	5.00	40	0
Car Back Bumper	CAR_BB	Build Location	1.00	0	1.00	48	0
Headlights	HEAD	Build Location	2.00	0	2.00	46	0
Front Bumper	CAR_FB	Build Location	1.00	0	1.00	48	0

Previous

Cancel

Transfer Inventory and Create Shortage

Click on **Transfer Inventory** transfer inventory to destination location.

3. Create Product Bundles

At this point you know which product bundles to create and already transferred inventories to the WIP location. This step creates bundle in the system and maintains relationship of the bundles to the inventory used to make that bundle. It also consumes the inventory of the components to make the product bundles/product. This step is more interactive where you need to choose which inventory items to use to make product/product bundles.

You need to follow the steps of the product bundle creation wizard to make all the bundles.

SoClo

Q Search...

★

+

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👤

SoClo Inventory

SoClo Inventory

SoClo Short Cuts

SoClo Quick Setup

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SoClo Product Hierarchy

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SoClo Fulfillment Orders

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SoClo Fulfillment Order

FO-00001029

Required Component List

Extract Product Bundle(s)

Inventory Transfer

Create Product Bundle(s)

Consume Inventory

Related List Quick Links

SoClo Product Required (3)

SoClo Product Bundles (3)

SoClo Inventory Transfers (5)

SoClo Inventory Consumed (0)

SoClo Inventory Item Transactions (10)

SoClo Inventory Requests (0)

Assets (0)

>

New

Scheduled

Assigned

In Progress

Completed

Mark Status as Complete

Details

Fulfillment Order Number: FO-00001029

Order

Owner: Sulay Shah

Priority

SoClo Product Required (3)

PR-000412

Product Required: Car

Quantity Required: 1.00

Available Quantity: 1.00

Location : Build Location

This location is set on the fulfillment. If one is not set, this process will use WIP.

Return

Next

Bundles in Main Warehouse

Step 1 - See If We Have An Bundle To Move To Build Location

For each required product on this fulfillment, let's see if there are any bundles built and ready to claim.

- If we find an bundle, you will have the option to select it.
- If we do not find an bundle, when you click the next button we will look for components in wip to build that bundle

PRODUCT	
CarMain	There are no bundles in in the Build Location for this item.
CIA	There are no bundles in in the Build Location for this item.
CAR_EA	There are no bundles in in the Build Location for this item.

Return

Next

Location : Build Location

This location is set on the fulfillment. If one is not set, this process will use WIP.

Return

Create Bundle(s)

Products With Components And Inventory

Step 2 - Build Bundle From Component Build Location Inventory

For each component in an bundle, please select the Build Location inventory item you would like to use.

- Each row has an bundle, bundle components, and inventory in Build Location for that component by vendor. Please choose which inventory item you would like to use for each component in the bundle.
- As you select inventory items, you will see the number reduce.
- If you see a red row, its a no-go.

BUNDLE													
CarMain	There are no components listed in the hierarchy for this bundle												
CIA	<table><tr><th>COMPONENT OF CIA</th><th>QUANTITY REQUIRED</th><th>QUANTITY USED</th><td></td></tr><tr><td>Seat</td><td>4</td><td>0</td><td> USE FOR SEAT PRODUCT Seat QUANTITY ON-HAND 4 VENDOR Premium Seat Comp </td></tr><tr><td>Car Mats</td><td>5</td><td>0</td><td> USE FOR CAR MATS PRODUCT CAR_MAT PRODUCT Car Mats QUANTITY ON-HAND 5 VENDOR Car Premium Vendor </td></tr></table>	COMPONENT OF CIA	QUANTITY REQUIRED	QUANTITY USED		Seat	4	0	USE FOR SEAT PRODUCT Seat QUANTITY ON-HAND 4 VENDOR Premium Seat Comp	Car Mats	5	0	USE FOR CAR MATS PRODUCT CAR_MAT PRODUCT Car Mats QUANTITY ON-HAND 5 VENDOR Car Premium Vendor
COMPONENT OF CIA	QUANTITY REQUIRED	QUANTITY USED											
Seat	4	0	USE FOR SEAT PRODUCT Seat QUANTITY ON-HAND 4 VENDOR Premium Seat Comp										
Car Mats	5	0	USE FOR CAR MATS PRODUCT CAR_MAT PRODUCT Car Mats QUANTITY ON-HAND 5 VENDOR Car Premium Vendor										

BUNDLE

CarMain

There are no components listed in the hierarchy for this bundle

CIA

COMPONENT OF CIA	QUANTITY REQUIRED	QUANTITY USED
Seat	4	4
Car Mats	5	5

USE FOR SEAT

PRODUCT

PRODUCT

QUANTITY ON-HAND

VENDOR

USE FOR CAR MATS

PRODUCT

PRODUCT

QUANTITY ON-HAND

VENDOR

CAR_EA

COMPONENT OF CAR_EA	QUANTITY REQUIRED	QUANTITY USED
Front Bumper	1	1
Car Back Bumper	1	1
Headlights	2	2

USE FOR FRONT BUMPER

PRODUCT

PRODUCT

QUANTITY ON-HAND

VENDOR

USE FOR CAR BACK BUMPER

PRODUCT

PRODUCT

QUANTITY ON-HAND

VENDOR

USE FOR HEADLIGHTS

PRODUCT

PRODUCT

QUANTITY ON-HAND

VENDOR

Return

Create Bundle(s)

Click **Create Bundle(s)** to make bundles. You may need to go through these steps multiple times based on the availability of the inventory at the time of build product bundles/product.

4. Consume Inventory

To complete the fulfillment order, you need to consume the products which are used to fulfill this order. If Product/Product Bundles are already made before, then we don’t need to consume components under those products. We just need to consume the final product. We created process to consume the final products of the fulfillment order.

SoClo Inventory

SoClo Inventory

SoClo Short Cuts

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FO-00001029

Required Component List

Extract Product Bundle(s)

Inventory Transfer

Create Product Bundle(s)

Consume Inventory

Related List Quick Links

SoClo Product Required (0)

SoClo Product Bundles (0)

SoClo Inventory Transfers (0)

SoClo Inventory Consumed (0)

SoClo Inventory Item Transactions (10)

SoClo Inventory Requests (0)

Assets (0)

New

Scheduled

Assigned

In Progress

Completed

Mark Status as Complete

Details

Fulfillment Order Number: FO-00001029

Owner: Sulay Shah

Order

Priority

SoClo Product Required (3)

PR-000412

Product Required: Car

Quantity Required: 1.00

Available Quantity: 1.00

Consume Inventory

We have successfully started process to consume required products for this fulfillment order. It may partially consume inventory based on the available quantity.

Finish

In this example, we have already made Car using create bundle(s). Thus, only car needs to be consumed.

User can choose to manually consume the products as well.

- To consume the product, click New on the Products Consumed related list on Fulfillment Order.
- Select the quantity (most probably 1 for made product), product and Inventory Item at inventory location.
- Save changes

New SoClo Product Consumed

Information

* Service Order

SO-00000001

X

Product

Car

X

* Product Item

PI-0000018

X

* Quantity Consumed

1.00

Quantity Units Of Measure

--None--

Description

Description

Cancel

Save & New

Save

At this point, product's inventory count is reduced to the quantity has been consumed and transaction has been created for the product as well. They all can be seen in the related list of Fulfillment Order.

Fulfillment Order status can be updated at any stage of process.

SoClo Service Order
SO-00000001

Related List Quick Links

- Product Required (10+)
- Product Requests (0)
- Products Consumed (1)
- SoClo Product Item Transactions (1)
- SoClo Product Bundles (0)

Related Details

Product Required (6+)

New Display Product Hierarchy

Product Required Number	Product Required	Quantity Required	Available Quantity
PRN-000014	Car	1.00	0.00
PRN-000015	Front Bumper	1.00	49.00
PRN-000016	Splash Guard	4.00	146.00
PRN-000017	Back Bumper	1.00	99.00
PRN-000018	Exterior Assembly	1.00	0.00
PRN-000019	Head Light Housing	2.00	123.00

View All

Product Requests (0)

New

Products Consumed (1)

New

Product Consumed Number	Product	Product Item	Quantity Consumed
PC-000000	Car	PI-0000018	1.00

View All

SoClo Product Item Transactions (1)

New

Product Item Transaction Number	Product Item	Quantity	Transaction Type
T-0000032	PI-0000018	-1.00	Consumed

View All

Create Asset

Once this product(s) has been delivered and/or installed at the customer site, these products need to be converted into Asset. We have provided the way to create asset(s) from Fulfillment Order to make it easier.

All the products those are consumed in the Fulfillment Order can be converted in Asset. Also, if Product has child products under that than all child products can be converted in Asset.

- Click on “Create Asset” action button on the top of Fulfillment Order record.

SoClo Service Order
SO-00000001

Clone Submit for Approval Sharing

Related List Quick Links

- Product Required (10+)
- Product Requests (0)
- Products Consumed (1)
- SoClo Product Item Transactions (1)
- SoClo Product Bundles (0)

Related Details

Activity

Printable View
 Edit
 Delete
 Change Owner
 Create Asset

Filters: All time • All activities
 Refresh • Ex

- It will show you list of all the products that are consumed for this fulfillment order

Select Product to Convert to Assets from Service Order: SO-0000001

	PRODUCT NAME	PARENT NAME	PRODUCT ITEM NAME
☐	Car		PI-0000018
☐	Exterior Assembly	Car	PI-0000015
☐	Back Bumper	Exterior Assembly	PI-0000000
☐	Front Bumper	Exterior Assembly	PI-0000004
☐	Splash Guard	Exterior Assembly	PI-0000008
☐	Head Light Assembly	Car	PI-0000014
☐	Head Light Bulb	Head Light Assembly	PI-0000001
☐	Head Light Housing	Head Light Assembly	PI-0000005
☐	Interior Assembly	Car	PI-0000017
☐	Floor Mats	Interior Assembly	PI-0000003
☐	Leather Seat	Interior Assembly	PI-0000007
☐	Tailgate Light Assembly	Car	PI-0000016
☐	Tailgate Bulb	Tailgate Light Assembly	PI-0000010
☐	Tailgate Bulb Housing	Tailgate Light Assembly	PI-0000012

Cancel
Next

- It displays parent name which inherited from product hierarchy. When assets will be created, you will have asset hierarchy as well.
- Select the products which needs to be converted into asset.
- Click Next

Assets To Create

ASSET NAME	PRODUCT	PARENT ASSET	QUANTITY REQUIRED	STATUS	INSTALL DATE
	Car		* 1.00	* --None--	[5/14/2021]
	Exterior Assembly	Car	* 1.00	* --None--	[5/14/2021]
	Back Bumper	Exterior Assembly	* 1.00	* --None--	[5/14/2021]
	Front Bumper	Exterior Assembly	* 1.00	* --None--	[5/14/2021]
	Splash Guard	Exterior Assembly	* 4.00	* --None--	[5/14/2021]
	Head Light Assembly	Car	* 1.00	* --None--	[5/14/2021]
	Head Light Bulb	Head Light Assembly	* 2.00	* --None--	[5/14/2021]
	Head Light Housing	Head Light Assembly	* 2.00	* --None--	[5/14/2021]
	Interior Assembly	Car	* 1.00	* --None--	[5/14/2021]
	Floor Mats	Interior Assembly	* 4.00	* --None--	[5/14/2021]
	Leather Seat	Interior Assembly	* 4.00	* --None--	[5/14/2021]
	Tailgate Light Assembly	Car	* 1.00	* --None--	[5/14/2021]
	Tailgate Bulb	Tailgate Light Assembly	* 2.00	* --None--	[5/14/2021]
	Tailgate Bulb Housing	Tailgate Light Assembly	* 2.00	* --None--	[5/14/2021]

Previous
Cancel
Save

- We need to pick Asset name here as you want to pick. Quantity information as already populated from product bundles.
- If products are installed at customer site, then pick the install date.

Assets To Create

ASSET NAME	PRODUCT	PARENT ASSET	QUANTITY REQUIRED	STATUS	INSTALL DATE
Car123	Car		* 1.00	* Shipped	[5/14/2021]
Exterior Assembly123	Exterior Assembly	Car	* 1.00	* Shipped	[5/14/2021]
Back Bumper 123	Back Bumper	Exterior Assembly	* 1.00	* Shipped	[5/14/2021]
Front Bumper 123	Front Bumper	Exterior Assembly	* 1.00	* Shipped	[5/14/2021]
Splash Guard 123	Splash Guard	Exterior Assembly	* 4.00	* Shipped	[5/14/2021]
Head Light Assembly 123	Head Light Assembly	Car	* 1.00	* Shipped	[5/14/2021]
Head Light Bulb 123	Head Light Bulb	Head Light Assembly	* 2.00	* Shipped	[5/14/2021]
Head Light Housing 123	Head Light Housing	Head Light Assembly	* 2.00	* Shipped	[5/14/2021]
Interior Assembly 123	Interior Assembly	Car	* 1.00	* Shipped	[5/14/2021]
Floor Mats 123	Floor Mats	Interior Assembly	* 4.00	* Shipped	[5/14/2021]
Leather Seat 123	Leather Seat	Interior Assembly	* 4.00	* Shipped	[5/14/2021]
Tailgate Light Assembly 1	Tailgate Light Assembly	Car	* 1.00	* Shipped	[5/14/2021]
Tailgate Bulb 123	Tailgate Bulb	Tailgate Light Assembly	* 2.00	* Shipped	[5/14/2021]
Tailgate Bulb Housing 12	Tailgate Bulb Housing	Tailgate Light Assembly	* 2.00	* Shipped	[5/14/2021]

Previous
Cancel
Save

- Save changes.
- Click on Assets tab to see the assets created from Fulfillment Order.

Assets

All Assets

New

14 Items • Sorted by Asset Name • Filtered by All assets • Updated a few seconds ago

Q Search this list...

☐	Asset Name ↑	Serial Number	Install Date	Account Name	Contact Name	Product Name	
1	☐ Back Bumper 123			Acme		Back Bumper	▼
2	☐ Car123			Acme		Car	▼
3	☐ Exterior Assembly123			Acme		Exterior Assembly	▼
4	☐ Floor Mates 123			Acme		Floor Mates	▼
5	☐ Front Bumper 123			Acme		Front Bumper	▼
6	☐ Head Light Assembly 123			Acme		Head Light Assembly	▼
7	☐ Head Light Bulb 123			Acme		Head Light Bulb	▼
8	☐ Head Light Housing 123			Acme		Head Light Housing	▼
9	☐ Interior Assembly 123			Acme		Interior Assembly	▼
10	☐ Leather Seat 123			Acme		Leather Seat	▼
11	☐ Splash Guard 123			Acme		Splash Guard	▼
12	☐ Tailgate Bulb 123			Acme		Tailgate Bulb	▼
13	☐ Tailgate Bulb Housing 123			Acme		Tailgate Bulb Housing	▼
14	☐ Tailgate Light Assembly 123			Acme		Tailgate Light Assembly	▼

- You can select one of the asset and click “View Asset Hierarchy” to see the relationship of assets at customer site.

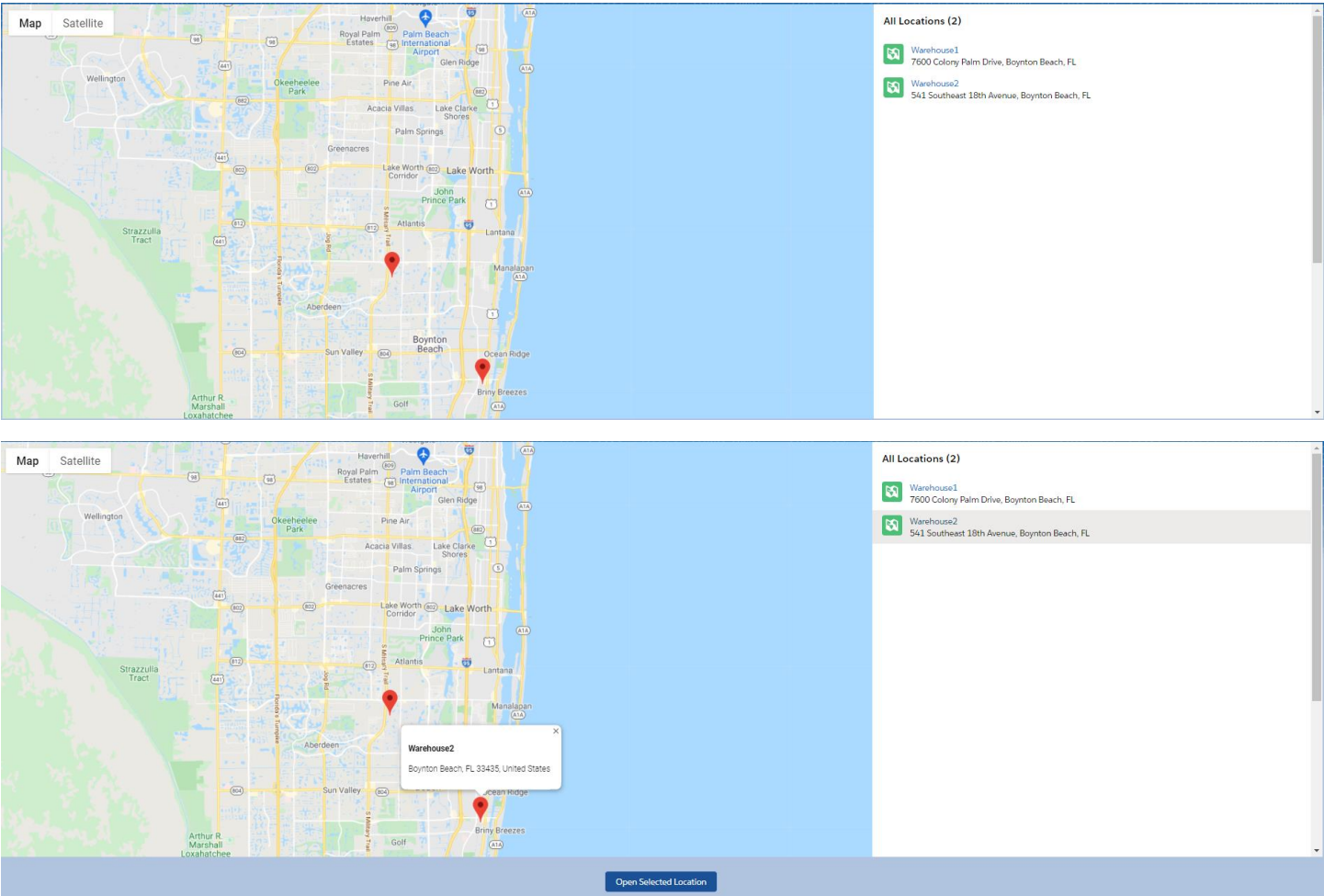
ASSET > CAR123

Asset Hierarchy

ASSET	STATUS	PRODUCT SKU	PRODUCT CODE	SERIAL NUMBER	LAST MODIFIED DATE	LAST MODIFIED BY	INSTALL DATE
▼ Car123 Current	Shipped		CRI23123		05/14/2021	Sulay Shah	
▼ Exterior Assembly123	Shipped		EXT123		05/14/2021	Sulay Shah	
Front Bumper 123	Shipped		FB123		05/14/2021	Sulay Shah	
Splash Guard 123	Shipped		SG123		05/14/2021	Sulay Shah	
Back Bumper 123	Shipped		BB123		05/14/2021	Sulay Shah	
▼ Head Light Assembly 123	Shipped		HEAD123		05/14/2021	Sulay Shah	
Head Light Bulb 123	Shipped		HEADBULB123		05/14/2021	Sulay Shah	
Head Light Housing 123	Shipped		HEADHOUSE123		05/14/2021	Sulay Shah	
▼ Interior Assembly 123	Shipped		INT123		05/14/2021	Sulay Shah	
Floor Mates 123	Shipped		FM123		05/14/2021	Sulay Shah	
Leather Seat 123	Shipped		LS123		05/14/2021	Sulay Shah	
Tailgate Light Assembly 123	Shipped		TLA123		05/14/2021	Sulay Shah	
Tailgate Bulb 123	Shipped		TB123		05/14/2021	Sulay Shah	
Tailgate Bulb Housing 123	Shipped		TBH123		05/14/2021	Sulay Shah	

SoClo Location Map

We have visual presentation of all the warehouse on the map. You can open warehouse location by click on open location button on the screen. From there, you see All products inventory information on that location.



Location

Warehouse2

Location Type
Warehouse

Related

Details

Information

Location Name

Warehouse2

Visitor Address

A00000002

Location Type

Warehouse

Time Zone

Description

Driving Directions

Parent Location

Location

System Information

Created By

Sulay Shah, 2/1/2021, 12:35 PM

Last Modified By

Sulay Shah, 5/13/2021, 9:53 AM

Owner

Sulay Shah

SoClo Product Items (5)

5 Items - Sorted by Product Name - Updated a few seconds ago

Product Item Name

Product Name

Quantity

Serial Number

1	PI-0000002	Head Light Bulb	50.00	
2	PI-0000006	Head Light Housing	50.00	
3	PI-0000009	Splash Guard	75.00	
4	PI-0000011	Tailgate Bulb	50.00	
5	PI-0000013	Tailgate Bulb Housing	75.00	

View All

You can also see the visual presentation of each product available at which inventory location on the product record. On product record, click on tab “Product Location Map” next to details tab. You will see the inventory location where this product is available.

Product

Tailgate Bulb

Edit

Submit for Approval

Clone

Product Code
TB123

Product Family

Related

Details

Product Location Map

SoClo Product Items (2)

Product Item Name

Location Name

Quantity

Serial Number

PI-0000011	Warehouse2	50.00	
PI-0000010	Warehouse1	48.00	

View All

Map

Satellite

All Locations (2)

Warehouse2

641 Southeast 18th Avenue, Boynton Beach, FL

Warehouse1

7600 Colony Palm Drive, Boynton Beach, FL

SoClo Scanner

We have added ability to scan QR Code to open record page of standard/custom SoClo Inventory object. This QR code has been generated from SoClo Inventory App. Currently, we have QR code to specific objects only like Product, Asset, Account, etc. You can find that QR Code in details page of the object.

This Scanner functionality only works in Mobile application.

Uninstallation Steps

- Remove Assignment SoClo Page Layout from user profiles of following standard objects
 1. Account
 2. Asset
 3. Location
 4. Opportunity
 5. Opportunity Product
 6. Product
 7. Order
- Deactivate Flows and Process Builder which starts from SoClo
 1. Go to Setup
 2. Search “Flow” in the Home of setup page
 3. Select the flow starts with SoClo, select “View Details and Versions” action from drop down menu
 4. Click on “Deactivate” action to deactivate flows
- Deactivate Process Builder which starts from SoClo
 1. Go to Setup
 2. Search “Process Builder” in the Home of setup page
 3. Click on active process builder starts with SoClo
 4. Expand that process builder to see the active version. Click on “Deactivate” actions for that version to deactivate process builder.
- Remove SoClo Inventory Permission Sets assignment if you have assigned to any users
 1. Remove assignment of SoClo Inventory Admin and SoClo Inventory User
 2. Go to Setup
 3. Search for Permission Sets and click on Permission Sets
 4. Look for above mentioned Permission Set in the list
 5. Click on the name of the Permission Set
 6. Click on “Manage assignments” on top of Permission Set Overview
 7. Select checkbox next to edit for all the users
 8. Click on “Remove Assignments” to remove permission sets assignment.
- Go to Package Installed and uninstall SoClo Inventory App

