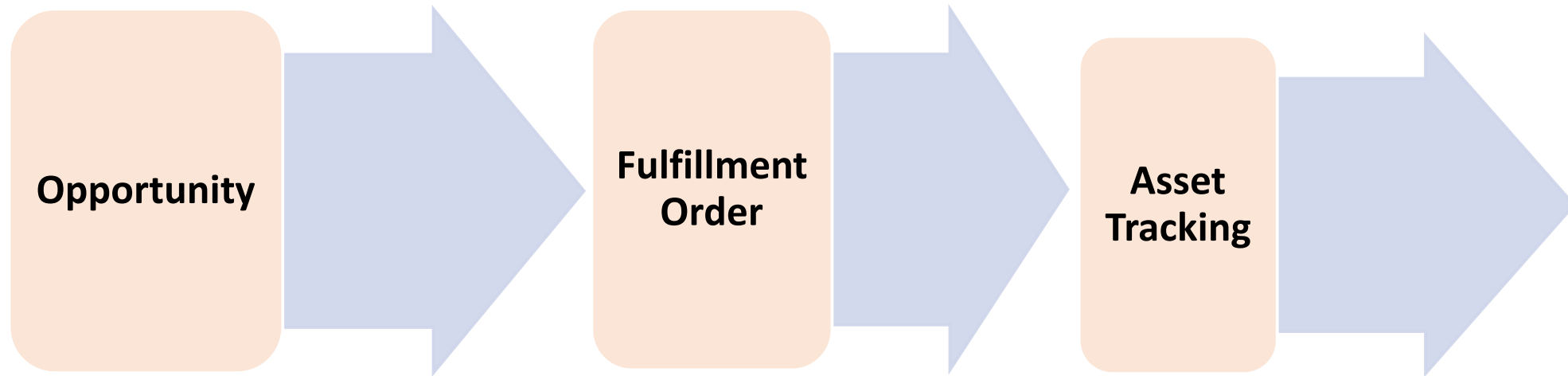




Installation and Configuration Instructions



The SoClo Inventory App is designed to give you the full flow of inventory from an opportunity to fulfillment order to an asset with features such as:

- ✓ Adding products/components
- ✓ Creating Fulfillment orders to build products
- ✓ Requesting and transferring products/components as needed between locations
- ✓ Converting build products into assets

Installation

A. Install the application from AppExchange.

1. Select “For Admins only”.

**Install SoClo Inventory**
By soclo inventory


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. 

☐ I acknowledge that I'm Installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

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

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

Assign Licenses

A. Manage Licenses

1. First go to Setup→ Installed packages. [Select Manage Licenses and Add Users.](#)

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Uninstall Manage Licenses	Knowledge Base Dashboards & Reports	Salesforce Knowledge	1.23	SK	Active	Unlimited	0	☐	Does not Expire	5/12/2022, 10:4
Description This package provides reports and dashboards that help you monitor your knowledge base.										
Uninstall Manage Licenses	SoClo Inventory	Southern Cloud Solutions	1.7	soclo_inv	Active	5	4	☐	Does not Expire	5/12/2022, 11:4
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A	N/A	N/A	N/A	N/A	5/12/2022, 10:4
Description Salesforce.com CRM Dashboards										

Package Details
SoClo Inventory
[Back to Previous Page](#)

Enable for Platform Integrations

Package Name	SoClo Inventory	Publisher	Southern Cloud Solutions
Status	Active	Allowed Licenses	5
Expiration Date	Does not Expire	Used Licenses	4
Enabled for Platform Integrations	☐		

A | B | C | D | E | F | G | H | I | J | K | L

Licensed Users

Add UsersRemove Multiple Users

Action	Full Name ↑	Role	Active	Profile
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Post – Installations Steps [Required]

Assign Permission Sets to your users in your org that need them.

We have added two permission sets:

1. SoClo Inventory Admin Grants View All and Modify All permission for all SoClo Inventory Objects to assigned users.
2. SoClo Inventory User Grants Create, Edit, View and View All permission for all SoClo Inventory Objects to assigned users.
3. You must also grant Create, Edit and Read permission for the Products standard object to your users' profile.
4. You need to grant access to Opportunity field of Order object to your users' profile.

Post – Installations Steps [Required], continued

Create the following Public Groups to receive custom notifications to a selected group of users.

- A. Label: SoClo Inventory Notification Group
 - 1. Group Name: SoClo_Inventory_Notification_Group
 - 2. Add Public Groups or Users as members
- B. Label: SoClo Maintenance Notification Group
 - 1. Group Name: SoClo_Maintenance_Notification_Group
 - 2. Add Public Groups or Users as members

Create the following Queues to create task for service maintenance.

- A. Label: SoClo Inventory Notification Queue
 - 1. Supported Objects: Task
 - 2. Queue Members: Group: SoClo Inventory Notification Group
- B. Label: SoClo Maintenance Notification Queue
 - 1. Supported Objects: Task
 - 2. Queue Members: Group: SoClo Maintenance Notification Group

Post – Installations Steps [Required], continued

Assign SoClo Page Layout to user profiles of following standard objects for the best use of SoClo Inventory application.

- 1.Account
- 2.Asset
- 3.Location
- 4.Opportunity
- 5.Opportunity Product
- 6.Order
- 7.Product

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

- 1.Product

Post – Installations Steps [Required], continued

Update Search Layout of the Price Book Entry standard object to display available quantity while adding Product to Opportunities.

1. Select “Price Book Entry” object from setup → Object Manager list
2. Select “Search Layout” and click edit “Default Layout” to update selected fields
3. Add “Quantity” and any other fields you wish to make visible from Available Fields to Selected Fields. Click Save

Create minimum Inventory locations required for this App.

- 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.
- Location Name and Location Type are required fields.
- If you want to see these locations on the map, add Visitor Address on the location
- **REQUIRED:** YOU MUST CREATE A MAIN LOCATION AND A LOCATION CALLED “WIP”. This will assist in accounting reporting.

Post – Installations Steps [Required], continued

Update Existing Products. Make sure to edit/enter new information in the Detail tab.

1. If Product is active, then select “Active” checkbox to true.
2. New “Type” attribute needs to be updated to one of following types:
 - a. Product
 - b. Product Bundle
 - c. Component
3. If you are not buying this product, then update “Make or Buy” to “Make” otherwise choose “Buy”.
4. Enter Maintenance & Lifecycle Section. These attributes will be assigned to Assets whenever it is created. There will be notification generated when certain criteria are met.
5. If you want to track inventory of this product, then select “IsInventory” attribute to true.

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.

1. Open “SoClo Inventory Item” in the Related tab.
2. Click on “New” on the SoClo Inventory Items section to add inventory for this product.
3. Select Product Name, Location, Quantity. Enter serial number if product is tracked by it. When using serial numbers, the quantity of the product must be 1.

Optional Installations Steps

Create/Update SoClo Product Quantity Records for Minimum Required Quantity

- Add SoClo Product Quantity record, if you would 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.