

SoClo Inventory

Installation and Setup Guide



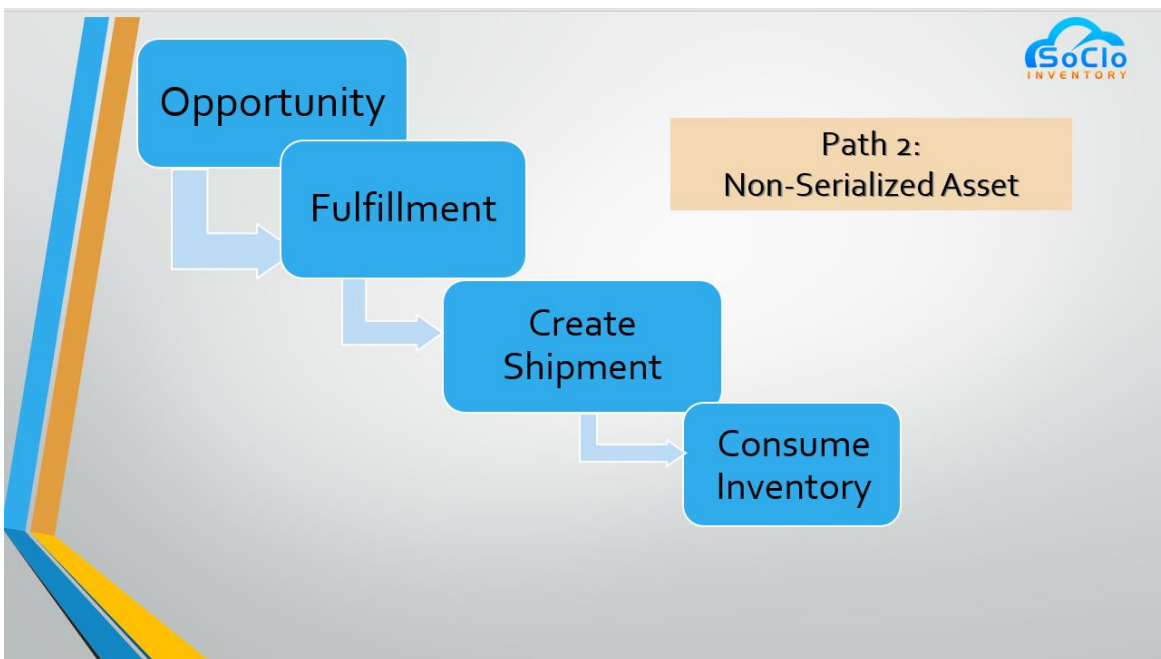
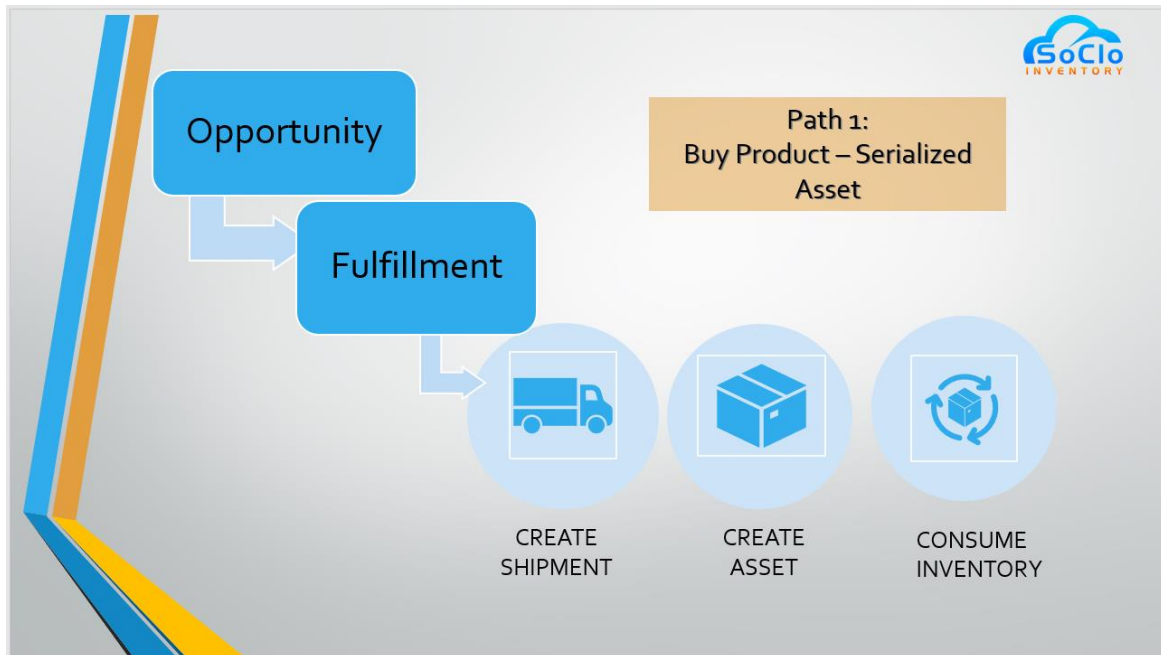


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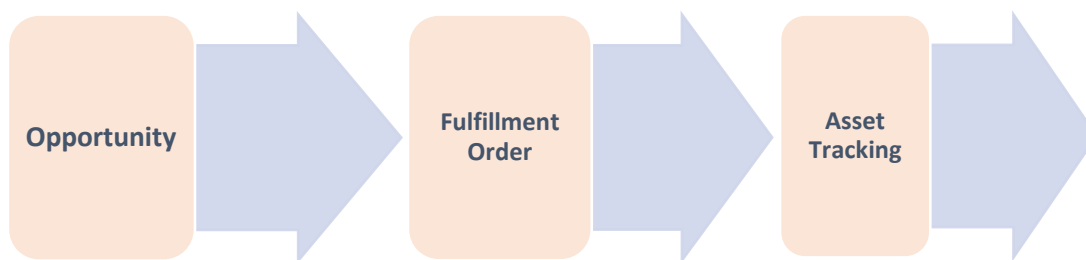
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SoClo Inventory

I. Introduction

START SEEING YOUR INVENTORY AND STOP SEARCHING

Perfect for small to midsize companies, the SoClo Inventory App delivers full circle ability to track products from inventory to building the product up to servicing and end of life cycle of the product.



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/ship products
- ✓ Requesting and transferring products/components as needed between locations
- ✓ Converting build products into assets
- ✓ Tracking asset's service maintenance intervals and life cycle

Features

 Lightning Ready	 Enterprise & Up
 No Limits	 Person Accounts

Package Contents

Custom Objects: 21
Custom Applications: 1
Custom Tabs: 22

Lightning Components

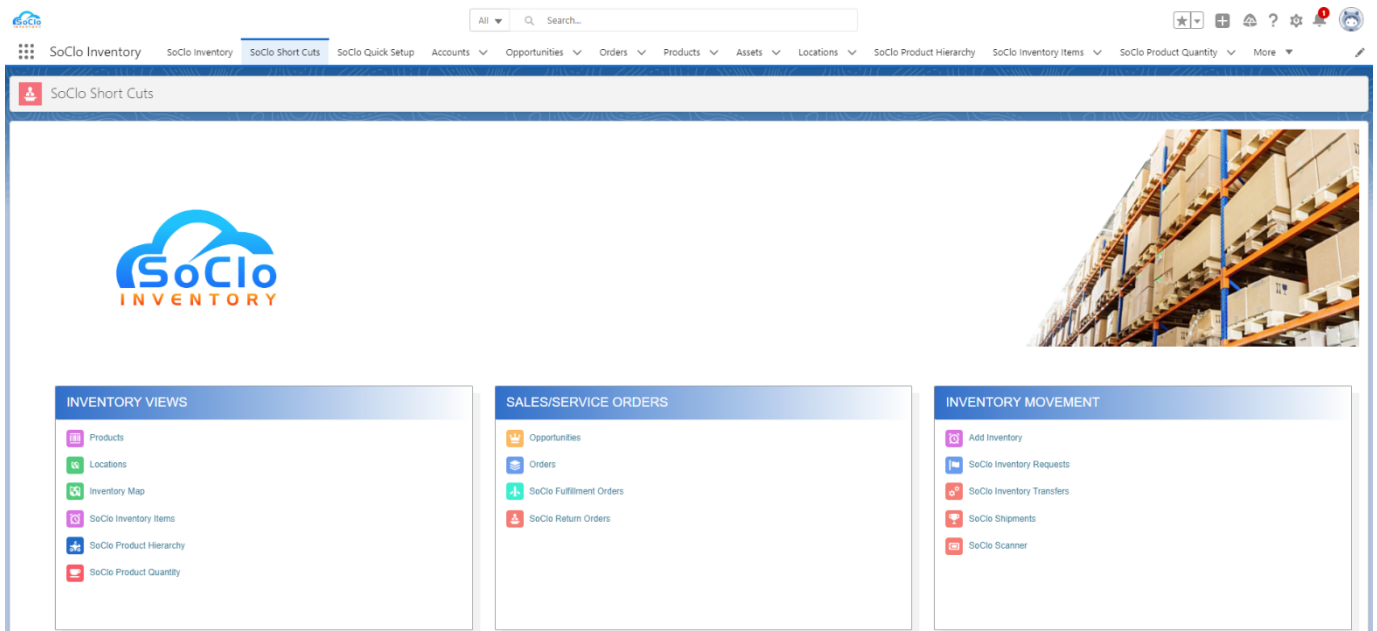
Global: 6
App Builder: 2
Community Builder: 0

Requirements



Salesforce Edition Enterprise, Unlimited, Developer

Use SoClo Short Cuts tab to view short cuts by Inventory/Sales/Service and Inventory Movement:



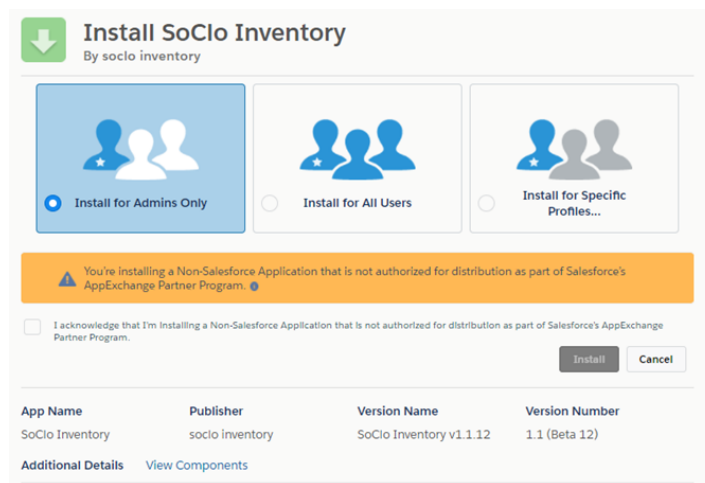
II. Installation Steps

A. Manage licenses

1. Navigate to Setup, Installed packages.

B. Install the application

1. Select "For Admins only".
2. Manage/Assign Licenses after installation is complete.



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

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



SETUP

Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deploy before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages								
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	End
Uninstall Manage Licenses	Knowledge Base Dashboards & Reports	Salesforce Knowledge	1.23	SK	Active	Unlimited	0	
Description This package provides reports and dashboards that help you monitor your knowledge base.								
Uninstall Manage Licenses	SoClo Inventory	Southern Cloud Solutions	2.1	soclo_inv	Trial	1	1	

Salesforce.com

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 Users Remove Multiple Users			
Action	Full Name ↑	Role	Active Profile

III. Post Installation Steps [REQUIRED]

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

We have added two permission sets:

- a. **SoClo Inventory Admin:** Grants View All and Modify All permission for all SoClo Inventory Objects to assigned users.
- b. **SoClo Inventory User:** Grants Create, Edit, View and View All permission for all SoClo Inventory Objects to assigned users.
- c. **Other Permissions:** Grant Create, Edit and Read permission for the **Products** standard object to your users' profile.
- d. **Other permissions:** Grant access to **Opportunity** field of Order object to your users' profile.


SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

[All](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label ↑	Description	License
☐ Clone	Manufacturing Sales Agreements For Community	Collaborate with your partners on sales agreements using the Manufact...	Manufacturing Sales Agreements For Community Psi
☐ Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
☐ Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
☐ Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesfor...	Cloud Integration User
☐ Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
☐ Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
☐ Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
☐ Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
☐ Clone	Slack Service User	Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
☒ Clone	SoClo Inventory Admin	Enables Modify All and View All access to the objects of SoClo Inventor...	
☒ Clone	SoClo Inventory User	Grant read, create, edit and view all permission to the objects of SoClo ...	
☐ Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
☐ Clone	Survey Creator	Lets a user create, edit, and delete Surveys.	Survey Creator User - 1 Seats

26-40 of 40 | 2 Selected | Page 2 of 2

2. Create Public Groups to receive custom notifications to a selected group of users. Assign people to the groups and queues so that the correct people get notified.

- A. Label: SoClo Inventory Notification Group
 - i) Group Name: SoClo_Inventory_Notification_Group
 - ii) Add Public Groups or Users as members
- B. Label: SoClo Maintenance Notification Group
 - iii) Group Name: SoClo_Maintenance_Notification_Group
 - iv) Add Public Groups or Users as members

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

3. 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

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

4. We recommend adding the following Related Lists to your page layouts for each object below:

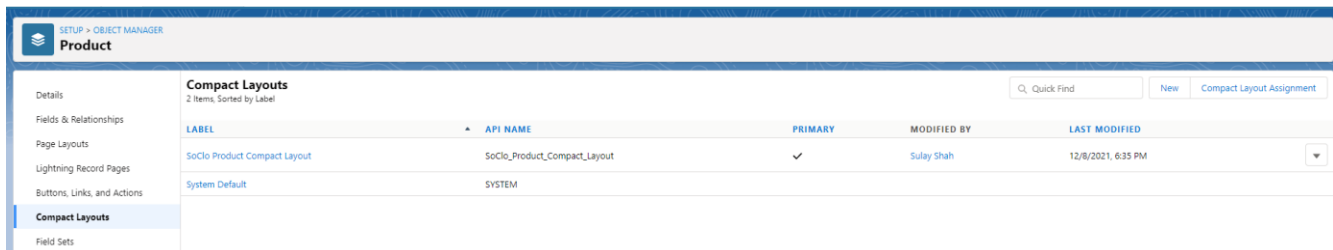
Object	Related List
Account	SoClo Inventory Items (Vendor)
	SoClo Inventory Items (Alternate Vendor)
Location	SoClo Inventory Items (Location Name), SoClo Product Quantity, Child locations, SoClo Inventories Tracking, SoClo Fulfillment Orders (WIP Location)
Opportunity	SoClo Fulfillment Orders
Product	SoClo Inventory Items
	SoClo Products Hierarchy (Component)
	SoClo Products Hierarchy (Product)
	SoClo Inventory Transfers
	SoClo Product Quantity
	SoClo Shipment Items
Order	SoClo Return Orders

4a. Reference for Custom Objects

Label	API Name	Description
SoClo Fulfillment Order	soclo_inv_Service_Order__c	This object captures a fulfillment made to customers for products, services, or bundles.
SoClo Inventory Consumed	soclo_inv_Product_Consumed__c	Child to the Fulfillment Object. This object captures consumption of an item from inventory and relates it to a fulfillment.
SoClo Inventory Item	soclo_inv_Product_Item__c	This object captures an actualized product in inventory.
SoClo Inventory Item Transaction	soclo_inv_Product_Item_Transaction__c	
SoClo Inventory Request	soclo_inv_Product_Request__c	This object captures transfer requests for product(s).
SoClo Inventory Request Line Item	soclo_inv_Product_Request_Line_Item__c	Child of the Inventory Request, this object captures product(s) that are being requested.
SoClo Inventory Tracking	soclo_inv_SoClo_Inventory_Tracking__c	
SoClo Inventory Transfer	soclo_inv_Product_Transfer__c	This object tracks the transfer details of an inventory item.
SoClo Product Bundle	soclo_inv_Product_Bundle__c	This object captures an assembly, kit, or collection of components that make up a unique inventory item when combined.
SoClo Product Bundle Item	soclo_inv_Product_Bundle_Item__c	Child of the product bundle, this object captures component inventory items that make up a bundle product.
SoClo Product Hierarchy	soclo_inv_Product_Hierarchy__c	This object captures a parent product and a child component.
SoClo Product Quantity	soclo_inv_Product_Location__c	This object captures quantity changes.
SoClo Product Required	soclo_inv_Product_Required__c	Child of the Fulfillment Order, this object captures products required for a fulfillment.
SoClo Purchase Order	soclo_inv_Purchase_Order__c	This object captures purchases made from vendors for inventory items.
SoClo Purchase Order Item	soclo_inv_Purchase_Order_Item__c	Child of the Purchase Order, this object captures product(s) being purchased.
SoClo Purchase Order Item Received	soclo_inv_Purchase_Order_Item_Received__c	Child of the Purchase Order Item, this object captures receiving a full or partial shipment of purchase order item(s).
SoClo Return Order	soclo_inv_Return_Order__c	This object captures products or inventory being returned.
SoClo Return Order Line Item	soclo_inv_Return_Order_Line_Item__c	Child of the Return Order, this object captures product(s) or inventory item(s) being returned.
SoClo Shipment	soclo_inv_Shipment__c	This object captures the shipment details of inventory transfer(s)
SoClo Shipment Item	soclo_inv_SoClo_Shipment_Item__c	
SoClo Work Type	soclo_inv_Work_Type__c	

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

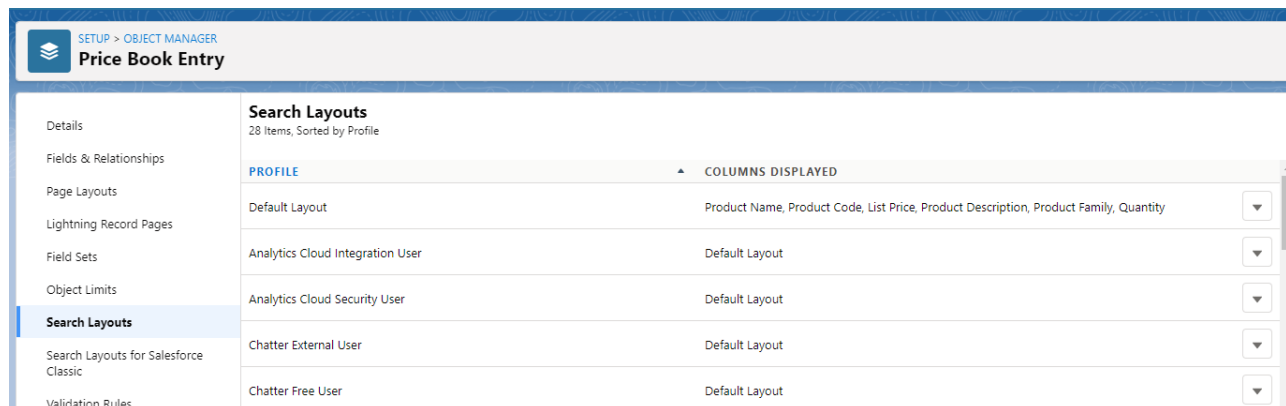
a. Product



SETUP > OBJECT MANAGER				
Product				
Compact Layouts 2 Items, Sorted by Label				
	Q, Quick Find	New	Compact Layout Assignment	
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
SoClo Product Compact Layout	SoClo_Product_Compact_Layout	✓	Sulay Shah	12/8/2021, 6:35 PM
System Default	SYSTEM			

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

- Select "Price Book Entry" object from setup, navigate to Object Manager
- Select "Search Layout" and click edit "Default Layout" to update selected fields
- Add "Quantity" from Available Fields to Selected Fields. Click Save

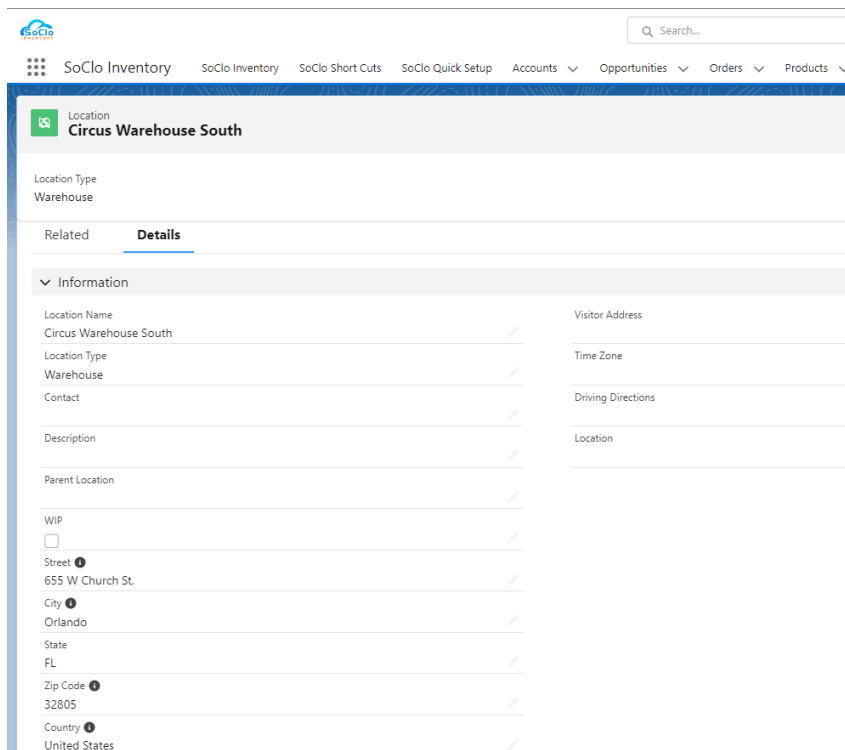


SETUP > OBJECT MANAGER	
Price Book Entry	
Search Layouts 28 Items, Sorted by Profile	
PROFILE	COLUMNS DISPLAYED
Default Layout	Product Name, Product Code, List Price, Product Description, Product Family, Quantity
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Chatter External User	Default Layout
Chatter Free User	Default Layout

IV. 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.

- First, before you create a location, you must add location type **picklist values** that pertain to your business needs. For example: your picklist may contain Warehouse, Distribution center, Van, Site, etc.
- We recommend creating a location for Work In Process named WIP.
- Create Location Name and Location Type and confirm they are required fields.
- If you want to see these locations on the map, ensure the full street address is entered.



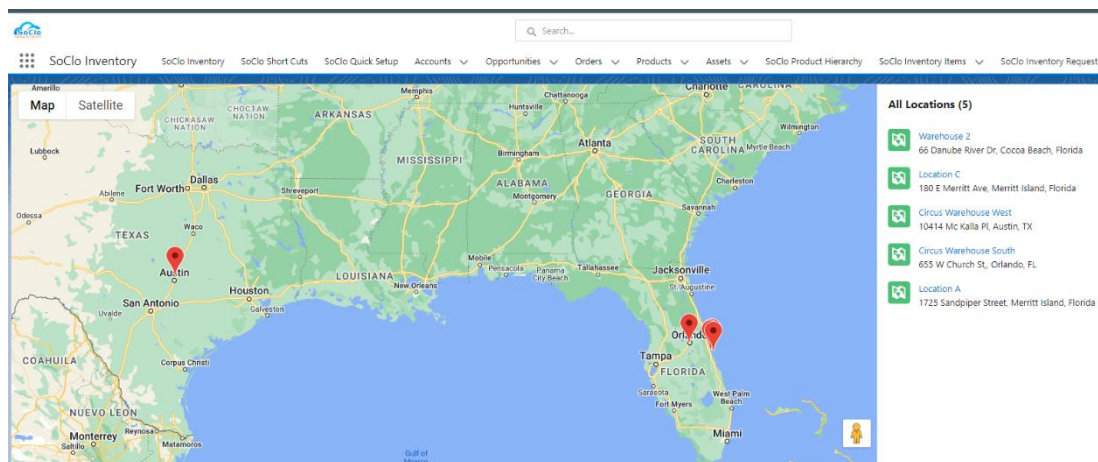
Location
Circus Warehouse South

Location Type
Warehouse

Related **Details**

Information

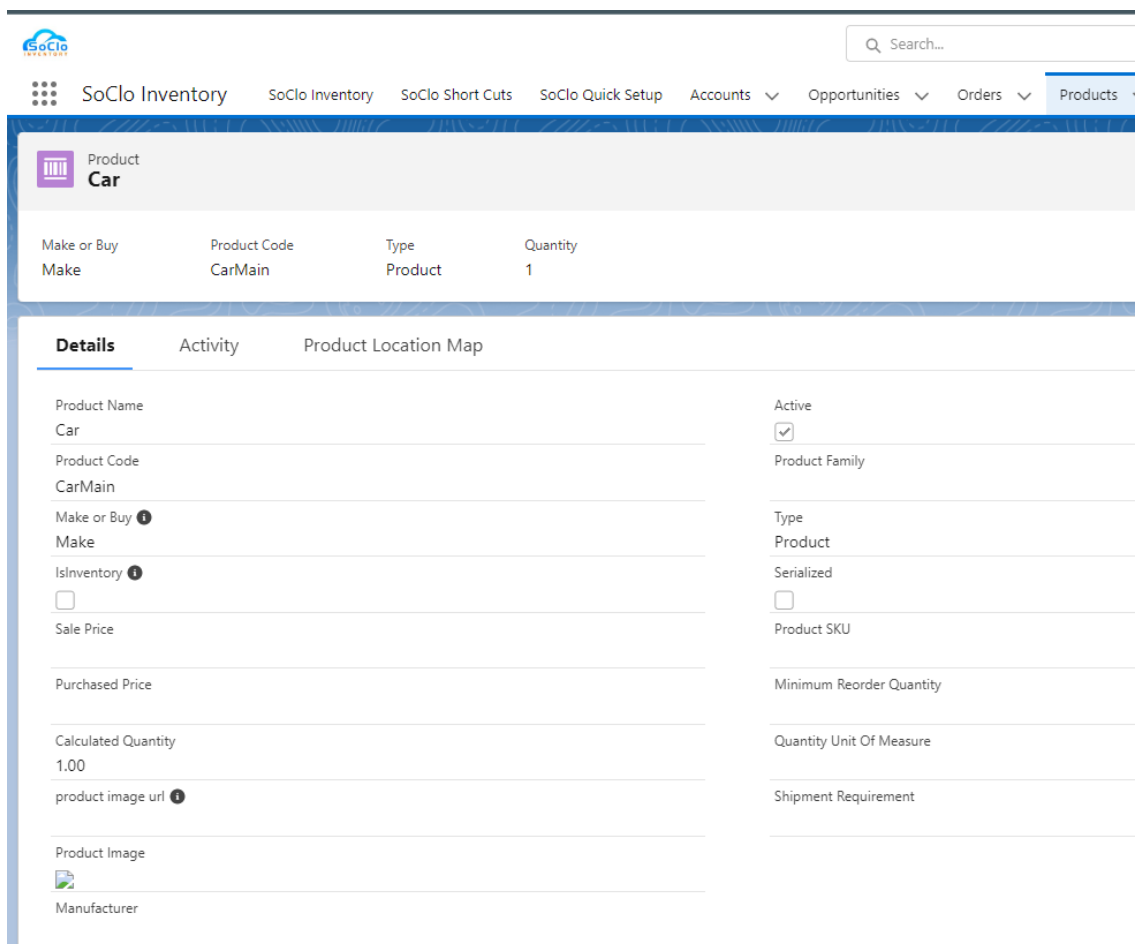
Location Name Circus Warehouse South	Visitor Address
Location Type Warehouse	Time Zone
Contact	Driving Directions
Description	Location
Parent Location	
WIP ☐	
Street 655 W Church St.	
City Orlando	
State FL	
Zip Code 32805	
Country United States	



V. Create Product or Update existing product

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

1. If Product is active, then click on the "Active" checkbox.
2. New "Type" attribute needs to be updated to one of following Product 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 when they are created. There will be notification generated when certain criteria are met.
5. If you want to track inventory of this product, then click on the "IsInventory" checkbox.



The screenshot displays the SoClo Inventory web application interface. At the top, there is a navigation bar with the SoClo logo, a search bar, and a menu with options: SoClo Inventory, SoClo Short Cuts, SoClo Quick Setup, Accounts, Opportunities, Orders, and Products. The 'Products' tab is selected, showing a list of products. The 'Product Car' is highlighted, and its details are shown in a table with columns: Make or Buy (Make), Product Code (CarMain), Type (Product), and Quantity (1).

Below the table, there are three tabs: Details, Activity, and Product Location Map. The 'Details' tab is active, showing a form with various fields for product information. The fields are organized into two columns:

- Left Column:**
 - Product Name: Car
 - Product Code: CarMain
 - Make or Buy: Make (with an information icon)
 - IsInventory: ☐ (with an information icon)
 - Sale Price:
 - Purchased Price:
 - Calculated Quantity: 1.00
 - product image url: (with an information icon)
 - Product Image: (with a placeholder image icon)
 - Manufacturer:
- Right Column:**
 - Active: ☒
 - Product Family:
 - Type: Product
 - Serialized: ☐
 - Product SKU:
 - Minimum Reorder Quantity:
 - Quantity Unit Of Measure:
 - Shipment Requirement:





SoClo Inventory

SoClo Inventory

SoClo Short Cuts

SoClo Quick Setup

Accounts ▾

Opportunities ▾

Orders ▾

Products ▾



Product

Car Interior Assembly

Make or Buy
Make

Product Code
CIA

Type
Product Bundle

Quantity
5

Details

Activity

Product Location Map

Product Name

Car Interior Assembly

Product Code

CIA

Make or Buy ⓘ

Make

IsInventory ⓘ



Sale Price

Purchased Price

Calculated Quantity

5.00

product image url ⓘ

Product Image



Manufacturer

Active



Product Family

Type

Product Bundle

Serialized



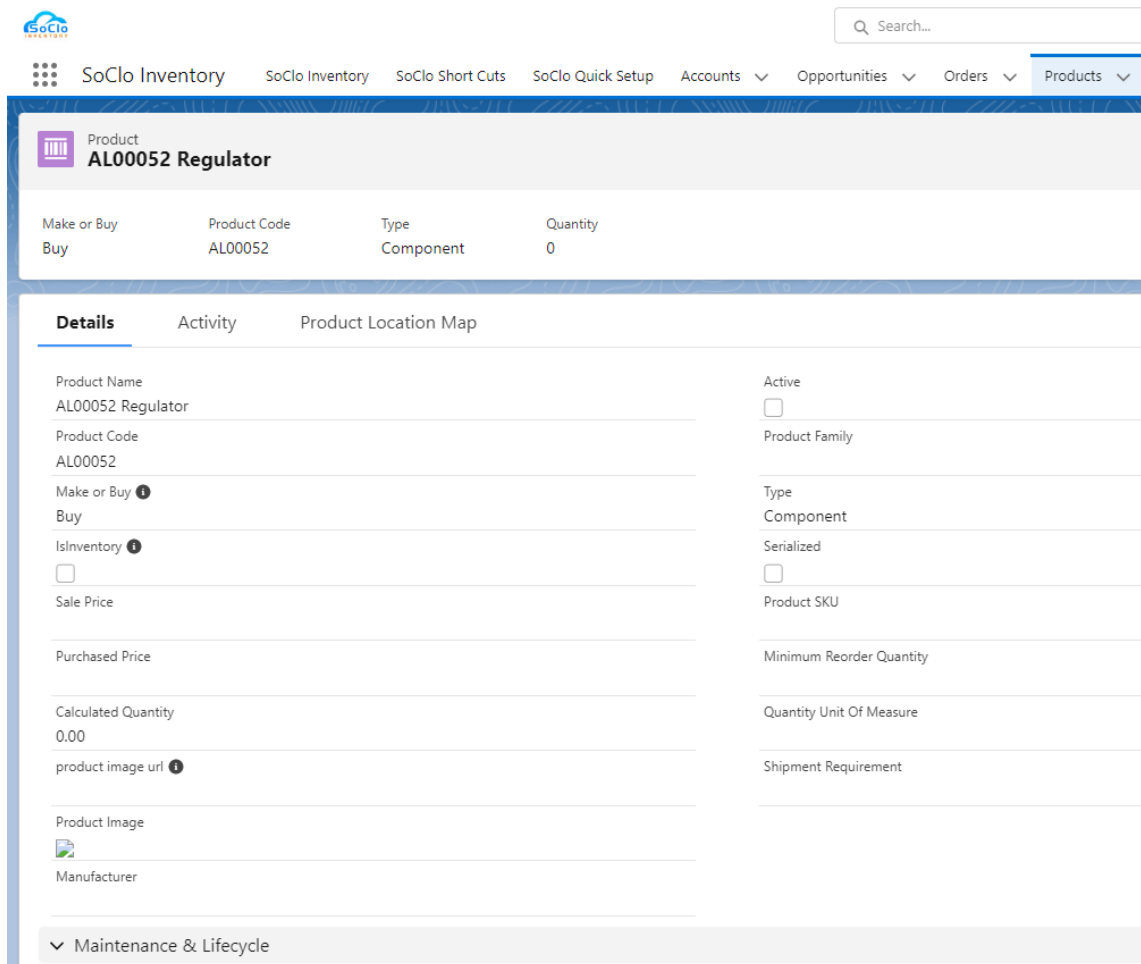
Product SKU

Minimum Reorder Quantity

Quantity Unit Of Measure

Shipment Requirement

▼ Maintenance & Lifecycle



The screenshot shows the SoClo Inventory web application interface. At the top, there is a navigation bar with the SoClo logo and a search bar. Below the navigation bar, the main header displays 'Product AL00052 Regulator'. A summary table shows the following data:

Make or Buy	Product Code	Type	Quantity
Buy	AL00052	Component	0

Below the summary table, there are three tabs: 'Details', 'Activity', and 'Product Location Map'. The 'Details' tab is selected, showing a form with various fields for product information. The fields are organized into two columns:

- Left Column:** Product Name (AL00052 Regulator), Product Code (AL00052), Make or Buy (Buy), IsInventory (checkbox), Sale Price, Purchased Price, Calculated Quantity (0.00), product image url (with a help icon), Product Image (with a small image icon), and Manufacturer.
- Right Column:** Active (checkbox), Product Family, Type (Component), Serialized (checkbox), Product SKU, Minimum Reorder Quantity, Quantity Unit Of Measure, and Shipment Requirement.

At the bottom of the form, there is a section titled 'Maintenance & Lifecycle' with a dropdown arrow.

VI. 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. Create inventory items so you can track inventory usage and restock when necessary.

1. Open "SoClo Inventory Item" in the Product's 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.

**** Note: When using serial numbers, the quantity of the product must be 1.**

New SoClo Inventory Item

Information

Inventory Item Name Product Name Car Interior Assembly X Serial Number Vendor Search Accounts... Q Alternate Vendor Search Accounts... Q Product Bundle Search SoClo Product Bundles... Q	Owner Kathy Carron * Location Name Circus Warehouse South X Sub Location Search Locations... Q Cost * Quantity 100.00 Quantity Unit Of Measure Each ▼ Grant Number PO Number
--	---

Cancel
Save & New
Save

VII. Create/Update SoClo Product Quantity Records for Minimum Required Quantity

1. Add SoClo Product Quantity record, if you would like to be reminded on low quantity of the product per location. When you add a 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 PQ-00000007

Product Quantity Name	PQ-00000007	Owner	Kathy Carron	
* Product	Car Interior Assembly Car Interior Assembly X	* Location	WIP WIP X	
* Minimum Required Quantity	5	Available Quantity	1 This field is calculated upon save	
Created By	Kathy Carron, 7/28/2022, 12:43 PM		Last Modified By	Kathy Carron, 7/28/2022, 12:45 PM

Cancel
Save & New
Save

SoClo Inventory

Search SoClo Product Quantity and more...

SoClo Product Quantity

Recently Viewed

5 items • Updated 4 minutes ago

	Product Quantity Name	Product	Location	Available Quantity	Minimum Required Quantity
1	PQ-00000007	Car Interior Assembly	WIP	1	5
2	PQ-00000000	Motherboard	Warehouse 1	0	1
3	PQ-00000003	Bolt, M4-0.7 x 20 mm Class 8.8 Zinc Plated Hex Bolt (2-Pack)	Warehouse 1	48	50
4	PQ-00000001	ACME System	Warehouse 1	2	1
5	PQ-00000002	Enclosure, extruded aluminum, 1U	Warehouse 1	1	2

VIII. Create Product Hierarchy

Users can create a product hierarchy here to itemize and document what is contained in the product. This is for customers who **manufacture** their own products using **sub-assemblies**.

*** Note:** *If your company is a reseller, you don't need to create product hierarchies.*

1. There are 3 levels of Products 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)

2. To create a hierarchy.

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

SoClo Inventory

Search Products and more...

Products

Recently Viewed

12 items • Updated a few seconds ago

	Product Name	Product Code	Product Description	Product Family
1	Interior Assembly	INT123		
2	Tailgate Light Assembly	TLA123		
3	Car Interior Assembly	CIA		
4	Head Light Assembly	HEAD123		
5	Car	CR123123		
6	Exterior Assembly	EXT123		
7	Car	CarMain		

SoClo Inventory

Product: Car

Make or Buy: Make

Product Code: CR123123

Type: Product

Quantity:

Details

Product Location Map

Product Name: Car

Product Code: CR123123

Make or Buy: Make

IsInventory: ☒

Sale Price:

Purchased Price:

Active: ☒

Product Family:

Type: Product

Serialized: ☐

Product SKU:

Minimum Reorder Quantity:

Price Books (0)

SoClo Inventory Items (0)

SoClo Products Hierarchy (Component) (0)

SoClo Products Hierarchy (Product) (0)

Create Product

New SoClo Product Bundle - Car

Enter Information

Name:

Type: Product

Create Location:

Description:

Product: Car

Serial Number:

Search Components

Product Name:

Product Code:

Search

Select Components to add into Car

PRODUCT NAME	PRODUCT CODE
☐ Back Bumper	BB123
☒ Exterior Assembly	EKT123
☐ 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

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

Note: You need to create a Product Hierarchy for bundles first or you will receive this error:
Product hierarchy is not defined to make "Car". Please create product hierarchy for this Product



All ▼

SoClo Inventory
SoClo Inventory
SoClo Short Cuts
SoClo Quick Setup
Accounts ▼
Opportunities ▼
Orders ▼
Products ▼
Assets ▼

Selected Components

PRODUCT	COMPONENT	QUANTITY REQUIRED
Car	Exterior Assembly	* 1
Car	Head Light Assembly	* 1
Car	Interior Assembly	* 1
Car	Tailgate Light Assembly	* 1

- d. Select the quantity required to make this product and click Save.
- e. It will take you back to the product hierarchy tab.
- f. 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	▼

3. The same way we can add components to Product Bundle.
4. Users have different options on this page to delete hierarchy, edit hierarchy, show details of product, etc.

IX. SoClo Inventory Request

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.

1. From the SoClo Inventory Requests tab, click New.
2. If the request is being made for a particular job, select the related Fulfillment Order.
(Optionally, select the related Account or Case.)
3. Enter the destination location, which is where the parts are needed.

4. Enter the address where the parts should be shipped; for example, the mailing address of the warehouse that is requesting them.
5. Select a shipment type/priority and enter the Need By Date.
6. Add a description.
7. Assign the inventory request a status:
 - a. Draft: Finalizing the inventory request details.
 - b. Submitted: The inventory request is ready for processing.
 - c. Received: The department in charge of fulfilling the request is working on it.
8. Save your changes.

New SoClo Inventory Request

Information

Inventory Request Number

Account ACME - Customer

Case Search Cases...

Fulfillment Order FO-00000000

Owner Kathy Carron

Status Submitted

* Destination Location Warehouse 1

Shipment Type Rush

Need By Date Date Time

Detail

Description

SoClo Request Inventory

Request inventory from one location to another location using the New button on the top right.

Step 1/5

Dismiss Next

Create one [SoClo Inventory Request Line Item](#) for each product needed.

1. From the Inventory Request Line Items related list, click **New**.
2. 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.
3. If the parts are being transferred from another location such as a warehouse, enter the source location.
4. Fill in the rest of the fields as needed.
5. Save your changes.

New SoClo Inventory Request Line Item

Information

Inventory Request Line Item Number

* Parent

IR-0000003

×

Product

Interior Assembly

×

* Quantity Requested

1

Description

Quantity Unit Of Measure

Each

Need By Date

Date

8/5/2022

Time

12:00 PM

Status

Submitted

Shipping Information

Shipment Type

Rush

Cancel

Save & New

Save

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

Notifications

[Mark all as read](#)

⚡

A inventory request IR-0000003 has been submitted

A inventory request IR-0000003 has been submitted by Kathy Carron for inventory transfer.

Please create a inventory transfer record to ship the product to Location Warehouse 1

Thanks,
SoClo Inventory App

3 minutes ago ●

8. Once Inventory Request has been received by the person responsible, they should update the status to Received. Inventory transfers are typically created in response to an inventory request.

X. SoClo Inventory Transfer

Inventory transfers document the transfer of inventory between locations. While inventory transfers are typically created in response to an inventory request, they do not have to be. For example, you might 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 an 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.

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

Edit PT-0000001

Product	Motherboard	Quantity Unit Of Measure	Each
* Quantity Sent	20	Destination Location	WIP
* Source Product Item	PI-0000000	Status	Shipped
Source Location	Warehouse 1	Shipment	Search SoClo Shipments...
Received	☒	Received By	Search People...
Quantity Received	20		
Fulfillment Order	Search SoClo Fulfillment Orders...		
Consumed	☐		
Destination Product Item	Search SoClo Inventory Items...		

test

Expected Pickup Date

Date

Time

Return Order Line Item

Search SoClo Return Order Line Items...

Inventory Transfer Number

PT-0000001

Cancel

Save & New

Save

Kathy Carron

New SoClo Inventory Request Line Item

Information

Inventory Request Line Item Number

* Parent

IR-0000003

Quantity Unit Of Measure

Each

Product

Tailgate Light Assembly

* Quantity Requested

1

Description

Need By Date

Date

8/5/2022

Time

12:00 PM

Status

Submitted

Shipping Information

Shipment Type

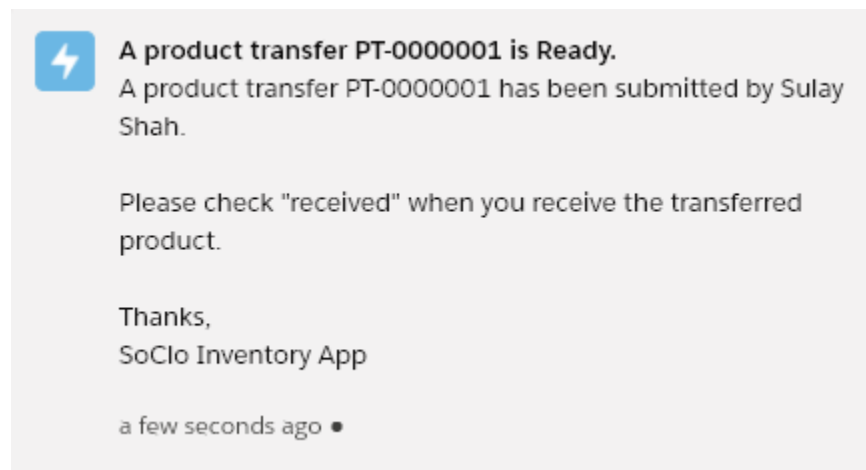
Rush

Cancel

Save & New

Save

- Once the Inventory Transfer is shipped, you need to select the status of the transfer to “Shipped” or “Ready for pickup”. When the status is changed, a custom notification will be created for selected inventory management group.



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

- Inventory items are updated or created.

- i) If there's already an 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 an inventory item doesn't exist (in other words, if it's the first time that the product is being stored at the location), an inventory item is automatically created that reflects the quantity transferred there.

2. Inventory item transactions are created.

- i) When you mark a transfer received, an 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

Edit

Delete

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

Return Order Line Items (0)

New

Edit PT-0000000


Tailgate Bulb

Quantity/Unit/Of Measure
Each

* Quantity Sent
10.00

* Source Product Item
PI-0000009

Received
☒

Quantity Received
10.00

Destination Location
Warehouse1

Status
Draft

Shipment
Search SoClo Shipments...

Received By
Sulay Shah

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

The Inventory count has been updated after inventory transfer is completed.

SoClo Product Items
Recently Viewed

11 Items - Updated a few seconds ago

Search this list...

New Import Change Owner

	Product Item Name	Product Name	Location Name	Quantity	Serial Number	Product Bundle
1	PI-0000009	Tailgate Bulb	Warehouse2	40.00		
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		

A 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](#)

A 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 an 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. Some things to keep in mind before deleting 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.

XI. Create a Product/Product Bundle

Some companies may have a Product Bundle like assembly to manufacture your product. There may be situations where you need to make products or product bundles and keep it in stock for an upcoming opportunity. For those cases, we have provided ways to make product/product bundle and allow user to select Components at the warehouse to build that product. We **consume** the parts/components that have 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 an inventory item.
- There must be availability on hand in the location where you are making the product in order to create the product bundle. If there is no stock, you will not be able to create it and will receive the following error. In that case, an inventory request and inventory transfer need to be done between locations.

Create Product Bundle
creating product bundle for - Tailgate Light Assembly

There are one or more products are missing at the Product 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

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	HEADBLUR123	Warehouse1	1	50.00	50
Head Light Housing	HEADHOUSE123	Warehouse1	1	50.00	50

Previous

Cancel

Next

Create Product Bundle

New SoClo Product Bundle - Head Light Assembly

Enter Product Bundle Information

Name *

Type *

Create Location *

Description

Product *

Serial Number

[Cancel](#) [Next](#)

SoClo Product Items
Recently Viewed

12 Items - Updated a few seconds ago

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		

Previous Cancel Save

SoClo Product Bundle
Toyota Head Light Assembly

Related Details

Product Bundle Name	Product
Toyota Head Light Assembly	Head Light Assembly
Type	Serial Number
Product Bundle	
Created Location	
Warehouse1	
▼ Description	
Description	
Owner	Last Modified By
Sulay Shah	Sulay Shah , 5/13/2021, 11:03 PM
Created By	
Sulay Shah , 5/13/2021, 11:03 PM	

Product Inventory Snapshot after Product Bundle has been made at Warehouse1.

A 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

XII. Create Opportunities

The standard Salesforce object “Opportunities” is used for the sales process. In Salesforce, an opportunity moves through a series of stages linked to type of tasks being performed. Your Salesforce administrator can review whether the stage values need to be updated to track progress for your company.

1. From Opportunities tab, click **New**.
2. Enter opportunity name, account name, and close date for opportunity.
3. 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

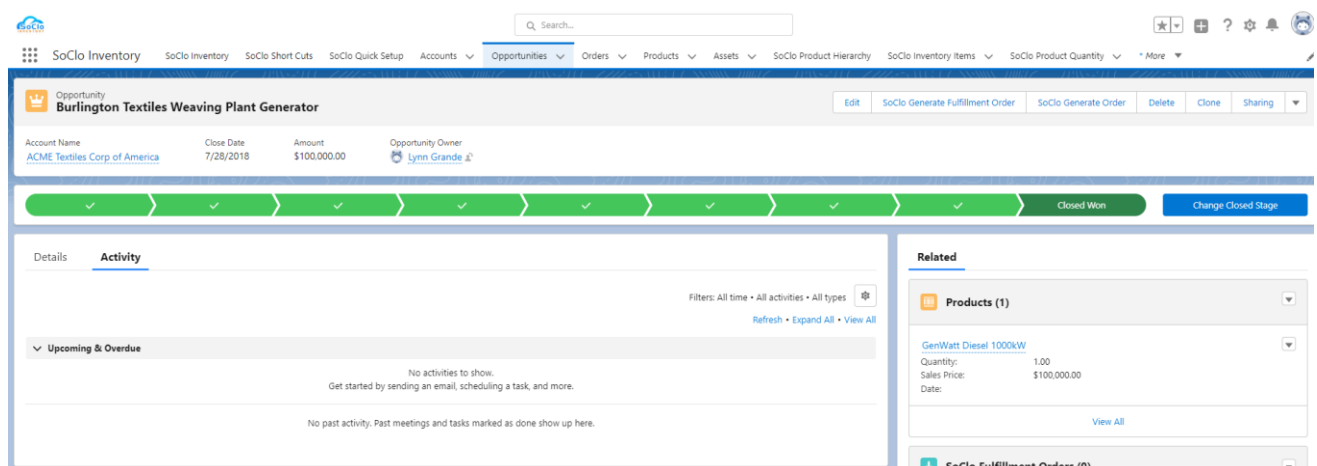
Cancel

Save & New

Save

You are able to add products to opportunities using the “Add Products” button.

*** Note: Before you can add Products to the Opportunity, the Products must first be added to the Price Book.***



The screenshot shows the 'Opportunity' page in the SoClo Inventory system. The top navigation bar includes 'SoClo Inventory', 'SoClo Short Cuts', 'Accounts', 'Opportunities', 'Orders', 'Products', 'Assets', 'SoClo Product Hierarchy', 'SoClo Inventory Items', 'SoClo Product Quantity', and 'More'. The main header displays the opportunity name 'Burlington Textiles Weaving Plant Generator' and a status bar with 'Closed Won' and 'Change Closed Stage' buttons. Below the header, the 'Details' tab is active, showing a table with columns for Account Name, Close Date, Amount, and Opportunity Owner. The table contains one row: 'ACME Textiles Corp of America', '7/28/2018', '\$100,000.00', and 'Lynn Grande'. The 'Activity' tab is also visible, showing a list of activities with filters for 'All time', 'All activities', and 'All types'. The 'Related' section on the right shows 'Products (1)' and 'SoClo Fulfillment Orders (0)'. The 'Products' section lists 'GenWatt Diesel 1000kW' with a quantity of 1.00, a sales price of \$100,000.00, and a date of 7/28/2018.

SoClo Inventory

Search...

SoClo Inventory SoClo Short Cuts SoClo Quick Setup Accounts Opportunities Orders Products Assets SoClo Product Hierarchy SoClo Inventory Items SoClo Product Quantity More

Opportunity
Burlington Textiles Weaving Plant Generator

Account Name: [ACME Textiles Corp of America](#) Close Date: 7/28/2018 Amount: \$100,000.00 Opportunity Owner: [Lynn Grande](#)

✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ Closed Won Change Closed Stage

Details Activity

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

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

Related

Products (1)

[GenWatt Diesel 1000kW](#)
Quantity: 1.00
Sales Price: \$100,000.00
Date:
View All

SoClo Fulfillment Orders (0)

Notes & Attachments (0)

Upload Files
Or drop files

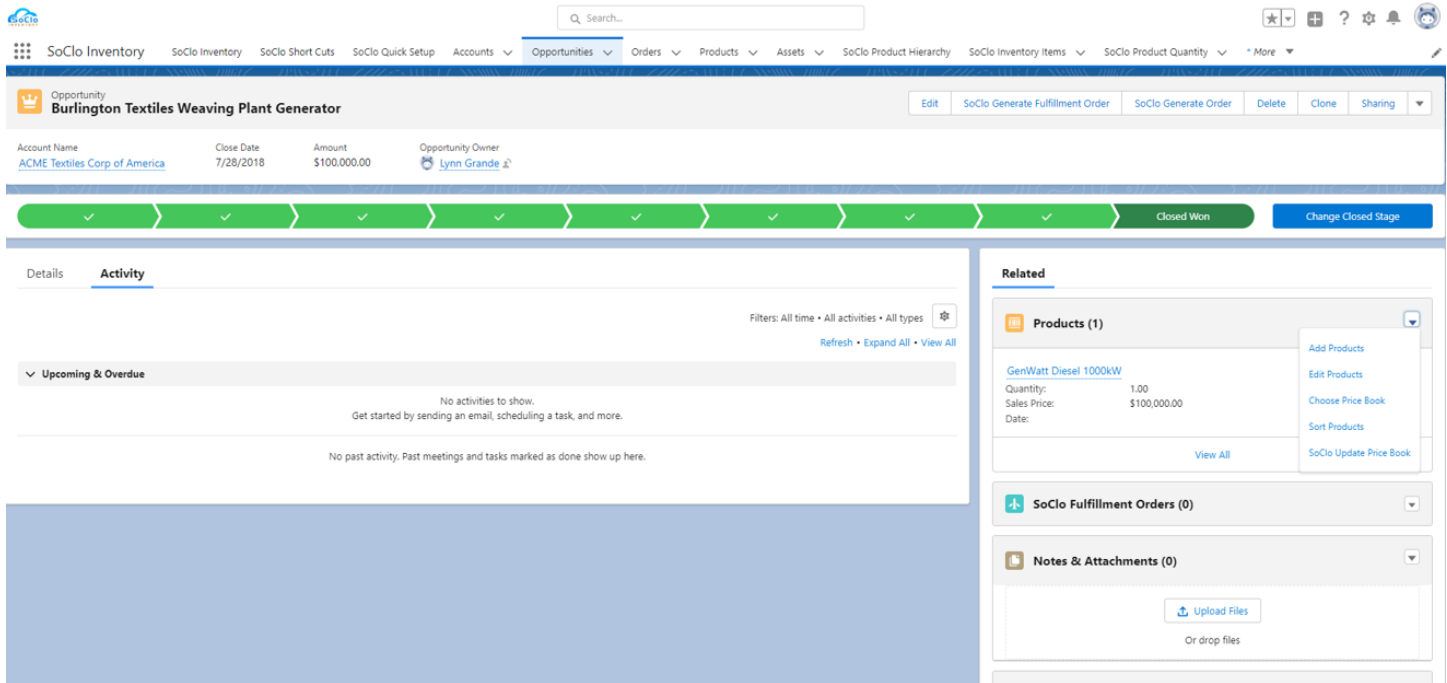
Add Products
Price Book: Standard Price Book

Search Products...

Image	Name	SKU	Price
	Car	CR123123	\$10,000.00

Cancel Post

From any stage of the Opportunity, the user has option to create a SoClo Fulfillment Order from within it by clicking the “SoClo Generate Fulfillment Order” button.



The screenshot shows the SoClo Inventory web application interface. At the top, there's a navigation bar with various menu items like 'SoClo Inventory', 'SoClo Short Cuts', 'Accounts', 'Opportunities', 'Orders', 'Products', 'Assets', etc. The main header area displays the opportunity name 'Burlington Textiles Weaving Plant Generator' along with account details: Account Name 'ACME Textiles Corp of America', Close Date '7/28/2018', Amount '\$100,000.00', and Opportunity Owner 'Lynn Grande'. Below this is a progress bar with several green checkmarks indicating stages of completion, ending with 'Closed Won'. The main content area is divided into two tabs: 'Details' and 'Activity'. The 'Activity' tab is active, showing a list of activities under the heading 'Upcoming & Overdue'. It states 'No activities to show. Get started by sending an email, scheduling a task, and more.' and 'No past activity. Past meetings and tasks marked as done show up here.' On the right side, there's a 'Related' section with three expandable panels: 'Products (1)' showing 'GenWatt Diesel 1000kW' with quantity 1.00 and sales price \$100,000.00; 'SoClo Fulfillment Orders (0)'; and 'Notes & Attachments (0)' with an 'Upload Files' button.

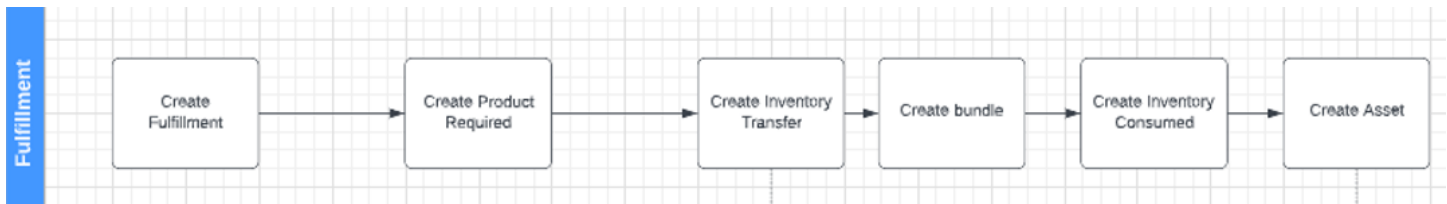
XIII. Create SoClo Fulfillment Orders

SoClo Fulfillment Order is used to track specific tasks required to be performed to complete a Fulfillment Order. It could be shipping the product to customer, maintenance required on asset, installed product on the customer site. There are two record types for Fulfillment order: Simple (No bundle) and (Contains Bundle).

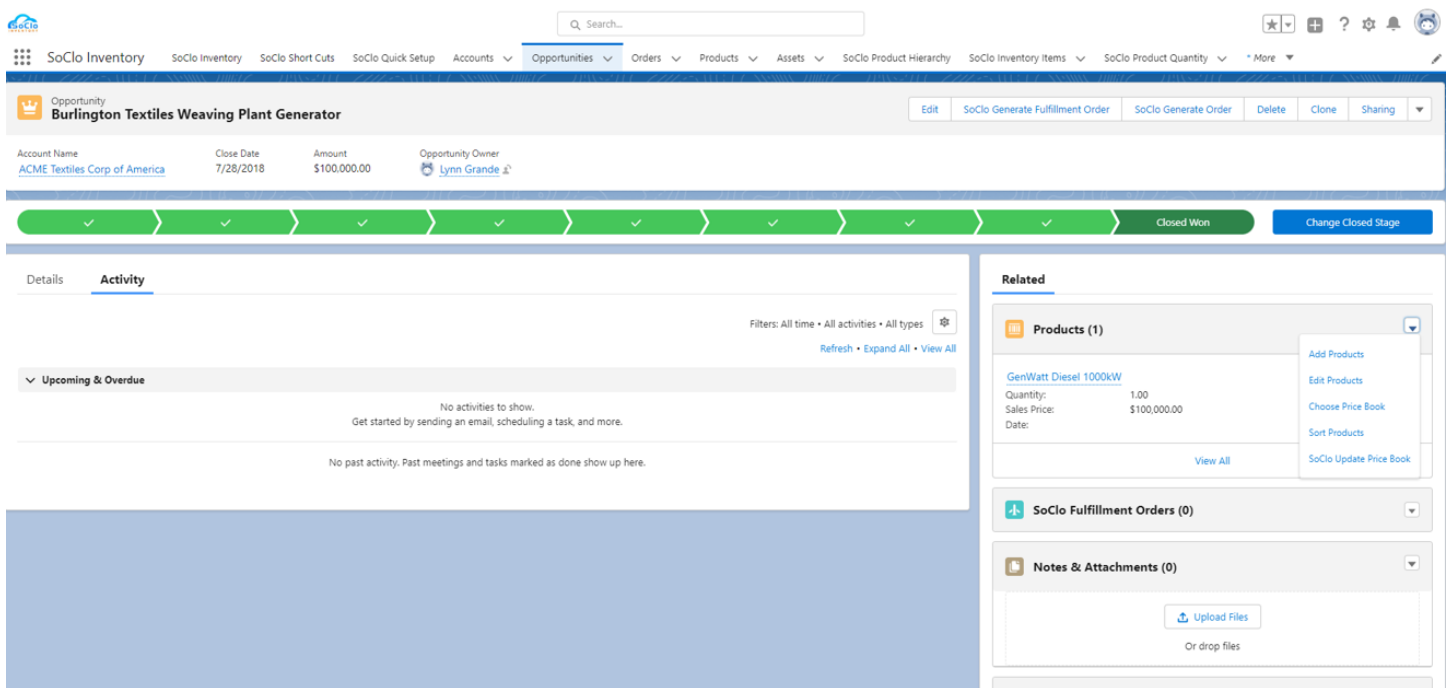
Simple Fulfillment (No Bundle): A simple fulfillment where all products are 'buy' type and do not need to be assembled. *These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse.

Fulfillment (Contains Bundle): A fulfillment where at least one product is 'make' type. *These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse.

Here is an overview of the Fulfillment Process workflow:

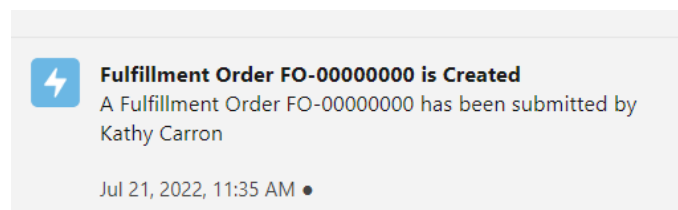


1. From the action buttons at the top right of the opportunity record page, click SoClo Generate Fulfillment Order. (Remember that products must first be added to the opportunity or you will get an error here).
2. We create Fulfillment Order for each product added in the Opportunity.
3. You will get the confirmation of Fulfillment Order created for the opportunity.



The screenshot shows the SoClo Inventory interface. 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, SoClo Product Quantity, and More. The main header displays the Opportunity Name "Burlington Textiles Weaving Plant Generator" and the Opportunity Owner "Lynn Grande". Below the header, a progress bar shows the status of the opportunity, with a "Closed Won" status. The left sidebar shows the "Activity" tab, which is currently empty. The right sidebar shows the "Related" section, which includes a list of products (GenWatt Diesel 1000kW) and a section for SoClo Fulfillment Orders (0). The bottom section shows a notification for the creation of a Fulfillment Order.

You will also receive a notification that the Fulfillment Order has been generated for opportunity. This assists the person responsible for the next step in the Fulfillment process so they can be aware of the status.



Fulfillment Order FO-00000000 is Created
 A Fulfillment Order FO-00000000 has been submitted by Kathy Carron
 Jul 21, 2022, 11:35 AM •

SoClo Inventory

Search...

SoClo Fulfillment Order **FO-00001171**

Related List Quick Links

- SoClo Product Required (1)
- SoClo Inventory Transfers (0)
- SoClo Product Bundles (0)
- SoClo Inventory Consumed (0)
- SoClo Inventory Item Transactions (2)
- SoClo Inventory Requests (0)
- Assets (0)
- SoClo Shipments (0)
- SoClo Purchase Orders (1)

Details Activity

Fulfillment Order Number: FO-00001171
 Account: [ACME Textiles Corp of America](#)
 Opportunity:
 Order:
 Locations:
 Location: [WIP](#)
 Sub Location:
 Dates:
 Start Date:
 Ship Date Actual:
 Ship Date Requested:
 Cost / Total:
 Labor Cost: \$0.00
 Component Cost: \$0.00
 Shipment Cost: \$0.00
 Commission: \$0.00
 Total Cost:
 Record Type: Contains Bundle
 Owner: [Josh Robinson](#)
 Priority: Low
 Status: New
 Sub Location:
 Fulfillment Order Closed:
 Fulfillment Order Due:
 Labor Total: \$0.00
 Component Total: \$0.00
 Shipment Total: \$0.00
 Credit Card Fee:
 Discount:
 SoClo Product Required (1)
 PR-000878
 Product Required: [Car Exterior Assembly](#)
 Quantity Required: 1.00
 Available Quantity: 0.00
 SoClo Inventory Transfers (0)
 SoClo Product Bundles (0)
 SoClo Inventory Consumed (0)
 SoClo Inventory Item Transactions (2)
 T-0006237
 Product Item: [PR-0003737](#)
 Quantity: 1.00
 Transaction Type: Shortage
 T-0006236
 Product Item: [PR-0003734](#)
 Quantity: 1.00
 Transaction Type: Shortage
 SoClo Inventory Requests (0)
 Assets (0)

SoClo Inventory

Search...

SoClo Product Required **PR-000878**

Product Required: [Car Exterior Assembly](#)
 Quantity Required: 1.00
 Available Quantity: 0.00

Details Activity

Information

Product Required: [Car Exterior Assembly](#)
 Quantity Required: 1.00
 Available Quantity: 0.00
 Reorder Quantity: 1.00
 SoClo Fulfillment Order: [FO-00001171](#)
 Quantity Unit Of Measure: Each

System Information

Created By: [Josh Robinson](#), 7/15/2022, 7:33 AM
 Last Modified By: [Josh Robinson](#), 7/15/2022, 7:33 AM

If the product requires different product bundles (assemblies) and/or other components to make it, then you should add all those child products as “Product Required” related list of Fulfillment Order.

Here, you can see the product hierarchy of the selected parent product which you started to work with.

In this example, “Car” is the product added in the Opportunity and we have added all the children of the “Car” hierarchy here as product required to make “Car”.

If “Car” is already made for this Customer/Account then we will set the available quantity in the inventory.

 SoClo Service Order
SO-00000001

Related List Quick Links ⓘ
 [Product Required \(10+\)](#)
[Product Requests \(0\)](#)
[Products Consumed \(0\)](#)
[SoClo Product Item Transactions \(0\)](#)
[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	1.00
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

Click on View All displays all the products required to build parent product.

SoClo Service Orders > SO-00000001
Product Required

New Display Product Hierarchy

14 Items · Updated a few seconds ago

Product Required Number	Product Required	Quantity Required	Available Quantity
1 PRN-000014	Car	1.00	1.00
2 PRN-000015	Front Bumper	1.00	49.00
3 PRN-000016	Splash Guard	4.00	146.00
4 PRN-000017	Back Bumper	1.00	99.00
5 PRN-000018	Exterior Assembly	1.00	0.00
6 PRN-000019	Head Light Housing	2.00	123.00
7 PRN-000020	Head Light Bulb	2.00	98.00
8 PRN-000021	Head Light Assembly	1.00	0.00
9 PRN-000022	Leather Seat	4.00	46.00
10 PRN-000023	Floor Mats	4.00	96.00
11 PRN-000024	Interior Assembly	1.00	0.00
12 PRN-000025	Tailgate Bulb Housing	2.00	123.00
13 PRN-000026	Tailgate Bulb	2.00	98.00
14 PRN-000027	Tailgate Light Assembly	1.00	0.00

Note: To complete the fulfillment order, you need to **consume the products** which are used to **fulfill this order**.

However, if Product/Product Bundles were already created before, then you don’t need to consume components under those products. We just need to consume the final product.

In this example, we have already made “Car” using “**Make Product**” from Product Hierarchy tab.

So, only “Car” needs to be consumed.

1. To consume the product, click New on the Products Consumed related list on Fulfillment Order.
2. Select the quantity (usually 1 for “Make” product), Product and Inventory Item at Inventory location.
3. Save changes.

New SoClo Product Consumed

Information

* Service Order

SO-00000001
×

* Quantity Consumed

1.00
↶

Product

Car
×

Quantity Units Of Measure

--None--
▼

* Product Item

PI-0000018
×

Description

Description

Cancel

Save & New

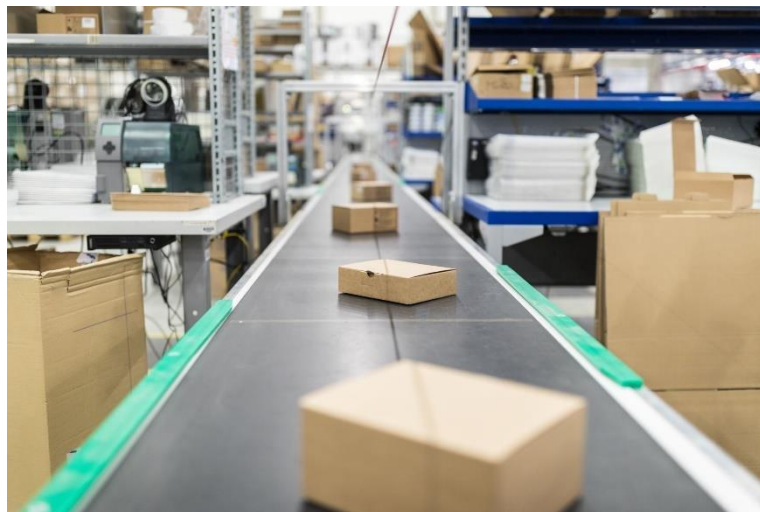
Save

At this point, the product’s inventory count is reduced by the quantity that has been consumed and the transaction has been created for the product as well.

Note:

These associated transactions can be seen in the related list of the Fulfillment Order.

The 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](#)

XIV. Create Asset

Once this product(s) has been delivered and/or installed at the customer site, they need to be **converted** into an Asset. To make this process easy, we have provided a “Create Asset” Button for you to use directly from the Fulfillment Order.

Note:

All of the products that are consumed in the Fulfillment Order can be converted into an Asset.

Also, if the Product has child products under them than all the Child products can be converted to an Asset.

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

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 121	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 Mates 123	Floor Mates	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

8. Save changes.
9. Click on the Assets tab to see the Assets that have been created from the Fulfillment Order.

Assets **All Assets** 14 Items - Sorted by Asset Name - Filtered by All assets - Updated a few seconds ago

Search this list...

Asset Name	Serial Number	Install Date	Account Name	Contact Name	Product Name
☐ Back Bumper 123			Acme		Back Bumper
☐ Car123			Acme		Car
☐ Exterior Assembly123			Acme		Exterior Assembly
☐ Floor Mates 123			Acme		Floor Mates
☐ Front Bumper 123			Acme		Front Bumper
☐ Head Light Assembly 123			Acme		Head Light Assembly
☐ Head Light Bulb 123			Acme		Head Light Bulb
☐ Head Light Housing 123			Acme		Head Light Housing
☐ Interior Assembly 123			Acme		Interior Assembly
☐ Leather Seat 123			Acme		Leather Seat
☐ Splash Guard 123			Acme		Splash Guard
☐ Tailgate Bulb 123			Acme		Tailgate Bulb
☐ Tailgate Bulb Housing 123			Acme		Tailgate Bulb Housing
☐ Tailgate Light Assembly 123			Acme		Tailgate Light Assembly

10. You can select one of the Assets and click “View Asset Hierarchy” to see the relationship of Assets at the customer’s site.

ASSET > CAR123

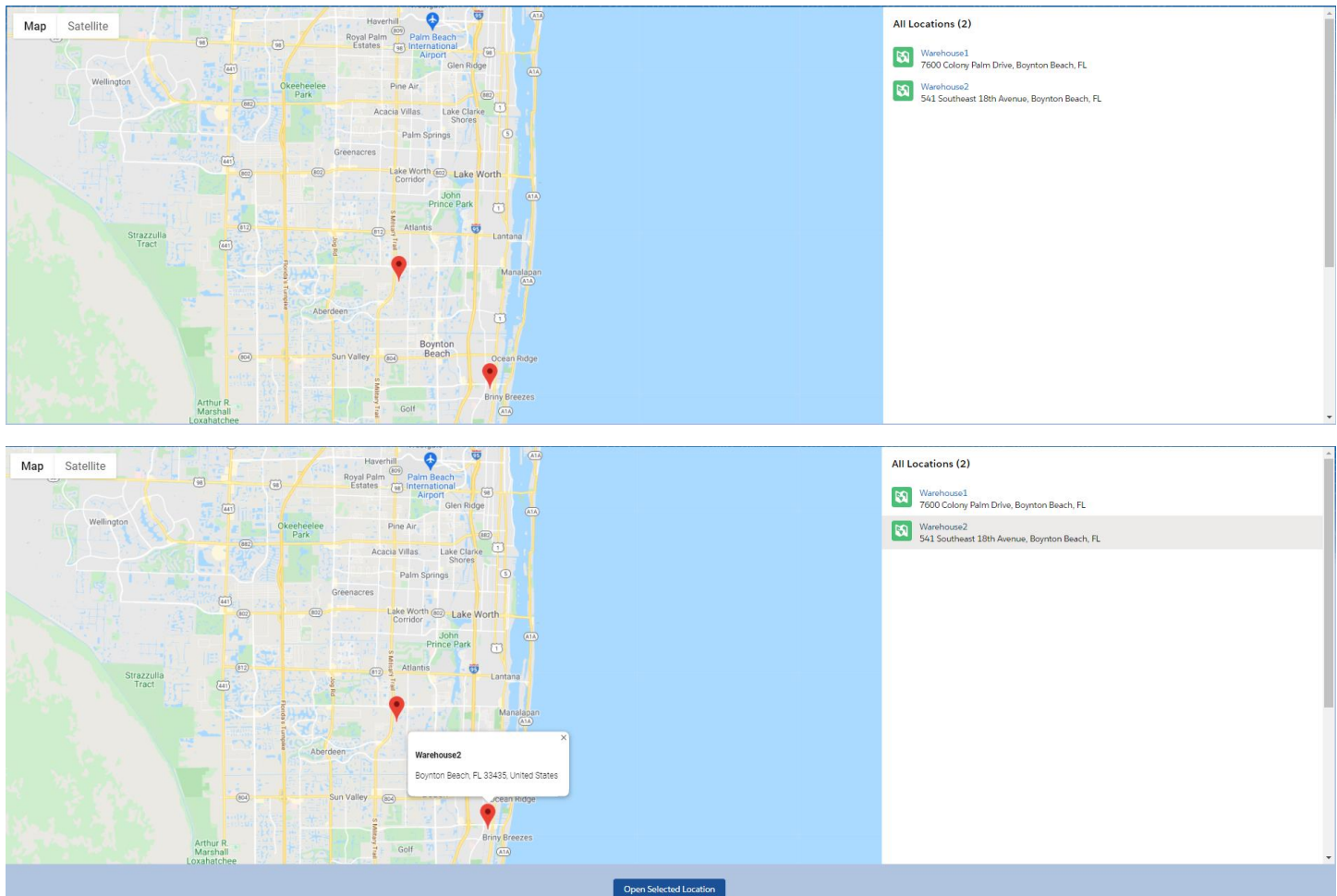
Asset Hierarchy

ASSET	STATUS	PRODUCT SKU	PRODUCT CODE	SERIAL NUMBER	LAST MODIFIED DATE	LAST MODIFIED BY	INSTALL DATE
Car123 Current	Shipped		CR123123		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	

XV. SoClo Location Map

SoClo Inventory App offers you a visual presentation of all the warehouses on the location map. You can open a warehouse location by clicking on the location hyperlink on the screen. From there, you can view all of the products in your inventory at that location.

***Note that to show on the map, the location needs to first have a full address entered.**




Location
Warehouse2

Location Type
Warehouse

Related

Details

Information

Location Name

Warehouse2

Location Type

Warehouse

Description

Parent Location

Visitor Address

A00000002

Time Zone

Driving Directions

Location

System Information

Created By

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

Owner

Sulay Shah

Last Modified By

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

SoClo Product Items (5)

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

Product Item Name

Product Name

Quantity

Serial Number

1	PF-00000002	Head Light Bulb	50.00	
2	PF-00000006	Head Light Housing	50.00	
3	PF-00000009	Splash Guard	75.00	
4	PF-00000011	Tailgate Bulb	50.00	
5	PF-00000013	Tailgate Bulb Housing	75.00	

View All

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


Product
Tailgate Bulb

Product Code
TB123

Product Family

Related

Details

Product Location Map

SoClo Product Items (2)

Product Item Name

Location Name

Quantity

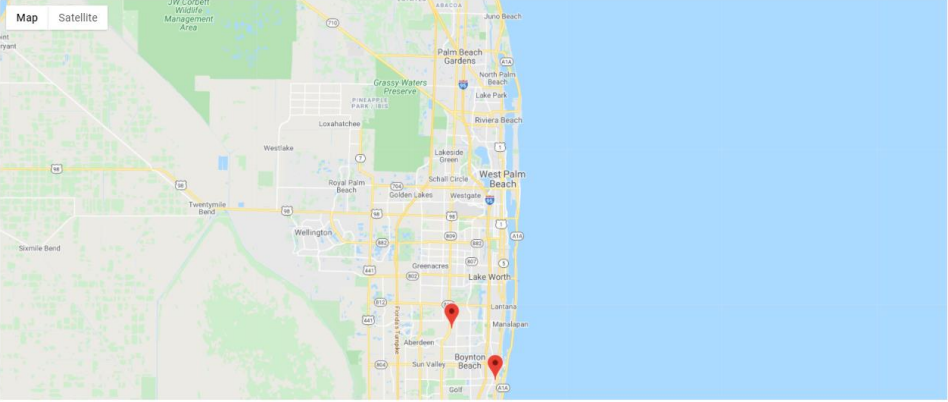
Serial Number

PF-00000011	Warehouse2	50.00	
PF-00000010	Warehouse1	48.00	

View All

Map

Satellite



All Locations (2)

Warehouse2

642 Southeast 18th Avenue, Boynton Beach, FL

Warehouse1

7600 Colony Palm Drive, Boynton Beach, FL

XVI. SoClo Scanner

With the SoClo Inventory app, you have the ability to scan a QR Code to open the record page of a standard/custom SoClo Inventory object. This QR code must be generated from the 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.

*** Note:** this Scanner functionality only works on the Mobile application.

XVII. Uninstallation Steps

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



Questions? Contact us.



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