

SoClo Inventory

Installation and Setup Guide





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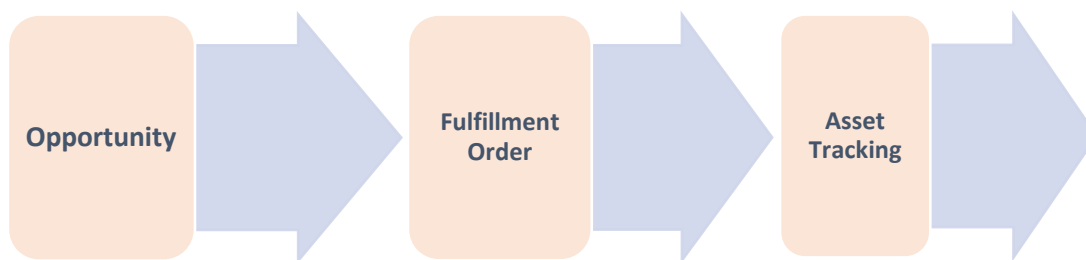
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SoClo Inventory

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

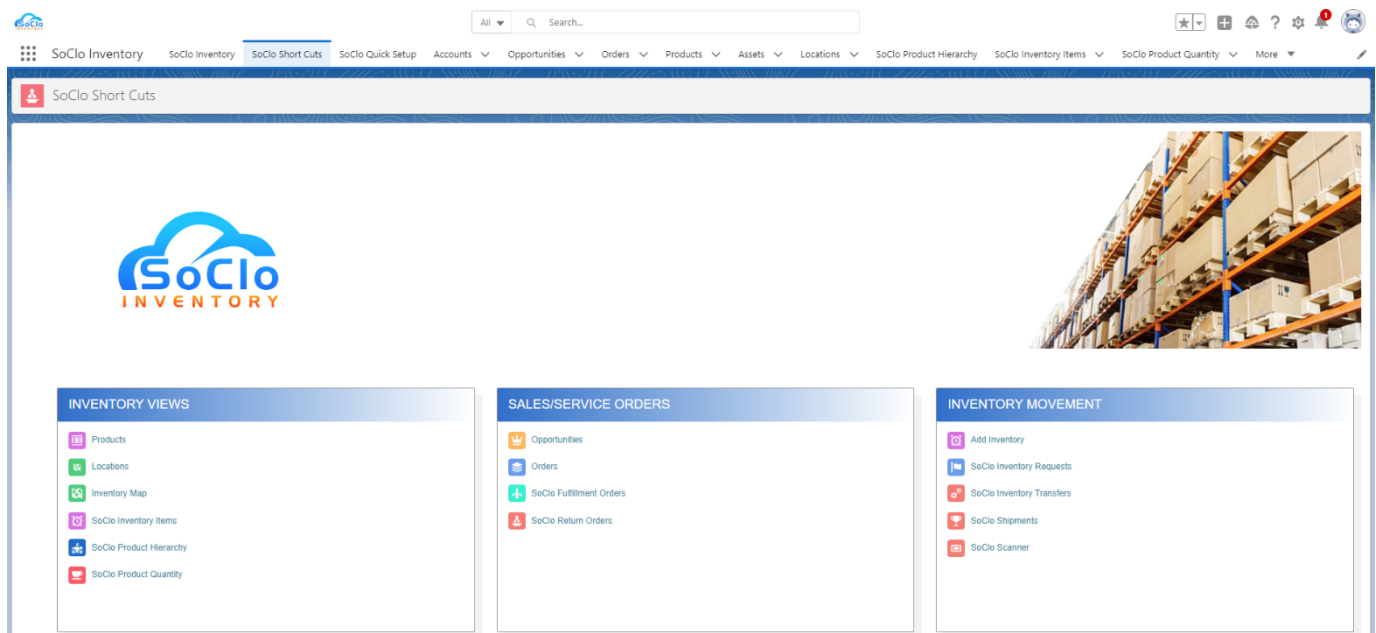
Global: 6
App Builder: 2
Community Builder: 0

Requirements



Salesforce Edition Enterprise, Unlimited, Developer

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



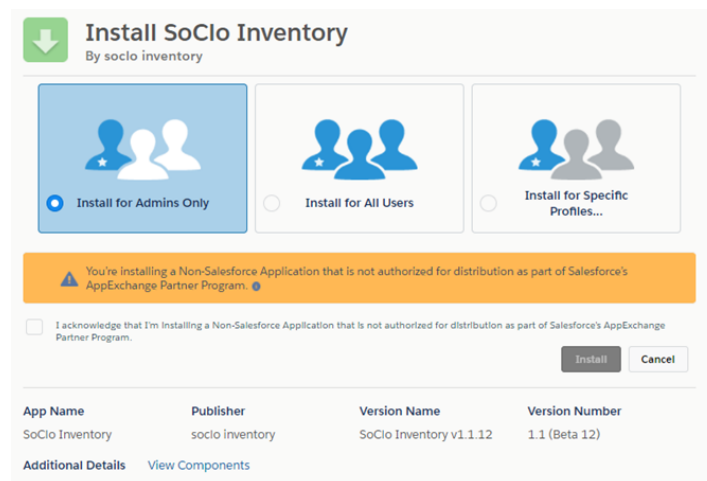
II. Installation Steps

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

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce org. Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development". You can deploy the components individually using the other features in setup or as a group by clicking the Deploy button. 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**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
Uninstall Manage Licenses	Knowledge Base Dashboards & Reports	Salesforce Knowledge	1.23	SK	Active
Description This package provides reports and dashboards that help you monitor your knowledge.					
Uninstall Manage Licenses	Salesforce Mobile Apps	Salesforce.com	1.20	sf_chttr_apps	Active
Description This package contains connected applications for the officially supported Salesforce mobile apps.					
Uninstall Manage Licenses	SoClo Inventory	Southern Cloud Solutions	2.3	soclo_inv	Active
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A
Description Salesforce.com CRM Dashboards					

Click on Manage Licenses and then Add Users.

Package Details

SoClo Inventory

[Back to Previous Page](#)

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

There are two permission set options for you to choose for your Users:

- 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.


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 Salestor...	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 | Previous Next | Page 2 of 2

2. Create Public Groups to send custom notifications to a selected group of users.
Then, 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:

- Account
- Location
- Opportunity
- Product
- Order

5. Assign SoClo Compact Layout and then SoClo Location page layout

- A. For the Product Object, assign the "SoClo Product compact Layout".

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

Page Layouts	
2 Items, Sorted by Page Layout Name	
PAGE LAYOUT NAME	
Copy of SoClo Location Layout	
SoClo Location Layout	

6. Update Search Layout of the Price Book Entry standard object to display available quantity while adding Product to Opportunities.
 - i. Select “Price Book Entry” object from setup, navigate to Object Manager
 - ii. Select “Search Layout” and click edit “Default Layout” to update selected fields
 - iii. 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	

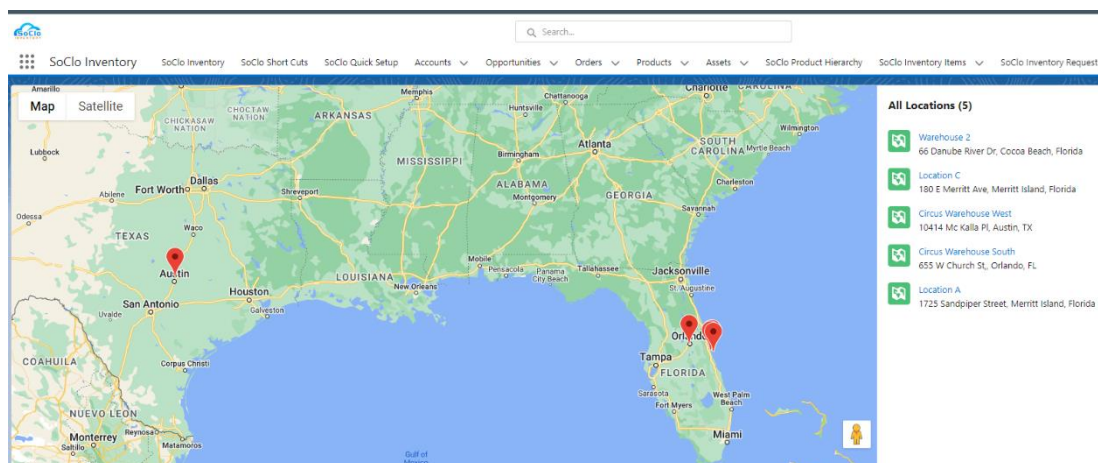
Create Inventory Locations

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.

NOTE: Assign the SoClo Location page layout to users before creating locations.

- 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 if your business uses one.
- 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.
- You can check "Default Source" to make this warehouse the default source location.

Information	
Location Name	Orlando Warehouse
Location Type	Warehouse
Contact	
Description	Orlando, FL Warehouse
Parent Location	
WIP	☐
Street	1375 E Buena Vista Dr
City	Orlando
State	FL
Zip Code	32830
Country	United States
Default Source	☒
Time Zone	(GMT-05:00) Eastern Standard Time (America/Coral_Harbour)
Driving Directions	
Location	



IV. Review Custom Settings:


SETUP
Custom Settings

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All [Create New View](#) [Get Usage](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	 Process Switches	Public	Hierarchy	socio_inv		120	0	0

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.
6. You can also enter a URL for a picture to be associated with the product. Simply paste the link in the “Product image URL” field.
7. Enter a Reorder Quantity if you want to keep track of when you should order more product once it falls beneath that quantity.
8. Enter Maintenance and Lifecycle information if you want to keep track of the Asset and schedule service opportunities.

New Product

Product Information

*Product Name

Solar Panel 2000

Active

☒

Product Code

Product Family

--None--

Make or Buy ⓘ

Buy

*Type

Component

IsInventory ⓘ

☒

Serialized

☐

Sale Price

Product SKU

Purchased Price

Minimum Reorder Quantity

100

product image url ⓘ

Quantity Unit Of Measure

--None--

Manufacturer

Shipment Requirement

Inventory GL Account

Reorder Quantity

100

Maintenance & Lifecycle

Inventory GL Account

Reorder Quantity

100

Maintenance & Lifecycle

Maintenance Schedule (In Weeks)

Life Span (In weeks) ⓘ

Maintenance Notification (In weeks) ⓘ

Life Span Notification (In Weeks) ⓘ

Description Information

Product Description

Product Extended Description

Salesforce ...

12

☒

B

I

U

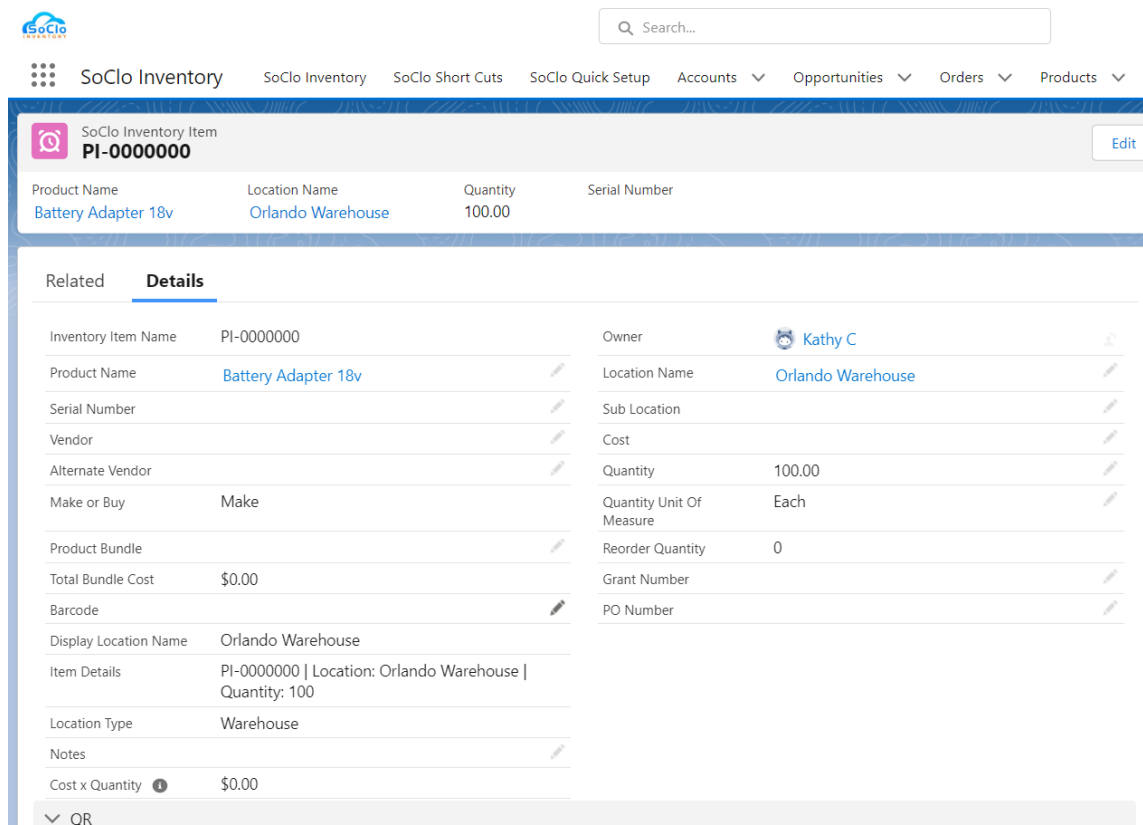
S

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. Navigate to Product.
2. Click on New on the "SoClo Inventory Item" Related list.
3. Enter details and required fields. Product Name will auto populate. Add Location, Quantity. Enter serial number if product is tracked by it.
4. Click save to create a new SoClo Inventory Item

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



The screenshot shows the SoClo Inventory Item form for item PI-0000000. The form is titled "SoClo Inventory Item" and includes a search bar at the top. The main form area displays the following details:

Product Name	Location Name	Quantity	Serial Number
Battery Adapter 18v	Orlando Warehouse	100.00	

Below the main form, there is a "Details" tab with the following fields:

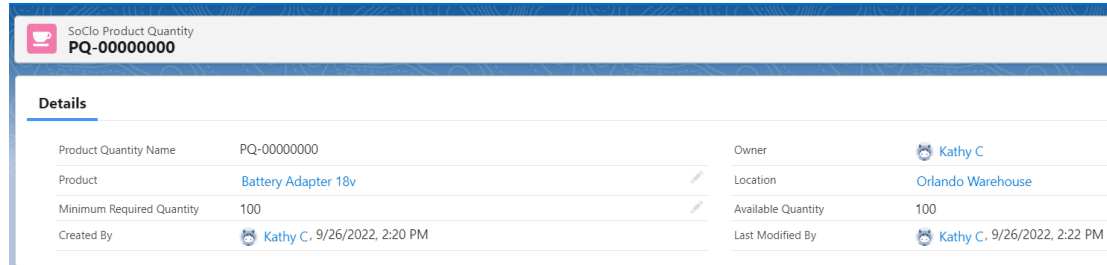
Inventory Item Name	PI-0000000	Owner	Kathy C
Product Name	Battery Adapter 18v	Location Name	Orlando Warehouse
Serial Number		Sub Location	
Vendor		Cost	
Alternate Vendor		Quantity	100.00
Make or Buy	Make	Quantity Unit Of Measure	Each
Product Bundle		Reorder Quantity	0
Total Bundle Cost	\$0.00	Grant Number	
Barcode		PO Number	
Display Location Name	Orlando Warehouse		
Item Details	PI-0000000 Location: Orlando Warehouse Quantity: 100		
Location Type	Warehouse		
Notes			
Cost x Quantity	\$0.00		

At the bottom of the form, there is a "QR" button.

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

Minimum Required Quantity is the reordering point.
Reorder quantity is the amount we reorder from the vendor.

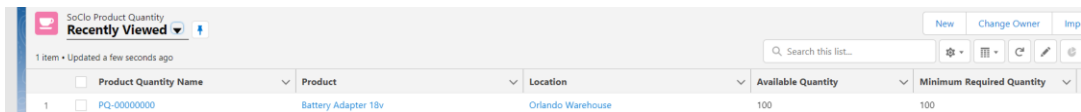
1. Navigate to the Product Record related list named “SoClo Product Quantity” and click New. It has it’s own tab or you can also get there from SoClo Short Cuts tab.
2. Update Minimum Required Quantity field to your desired quantity.
3. Users in the notification group will receive a notification when product quantity falls below minimum required quantity.



SoClo Product Quantity
PQ-00000000

Details

Product Quantity Name	PQ-00000000	Owner	Kathy C
Product	Battery Adapter 18v	Location	Orlando Warehouse
Minimum Required Quantity	100	Available Quantity	100
Created By	Kathy C, 9/26/2022, 2:20 PM	Last Modified By	Kathy C, 9/26/2022, 2:22 PM



SoClo Product Quantity
Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Product Quantity Name	Product	Location	Available Quantity	Minimum Required Quantity
PQ-00000000	Battery Adapter 18v	Orlando Warehouse	100	100

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 who is not building products, then you don’t need to create product hierarchies.

1. There are 3 types of Products:

- ✓ Product: (Can have Product Bundle and Components as their Children)
- ✓ Product Bundle: (Can have components as their Children)
- ✓ Components: (Cannot be Parent)

1. To create a hierarchy, follow these steps:

- a. Navigate to the “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 Product Hierarchy							
☐ Product	☐ Product Code	☐ Quantity Required for P...	☐ Quantity Unit Of Measure	☐ IsActive	☐ IsInventory	☐ Type	
☐ ☒ Solar Starter Kit	500		Each	✓	✓	Product Bundle	
☐ > Lower Rail	251	2	Each	✓	✓	Component	
☐ > Battery Converter	20	1	Each	✓	✓	Component	
☐ > Fixing Clap Set	18	2	Each	✓	✓	Component	
☐ > Foam Pad	39	1	Each	✓	✓	Component	
☐ > Deep Cycle Battery	177	1	Each	✓	✓	Component	
☐ > Solar Panel	194	2	Each	✓	✓	Component	
☐ > Wildlife Net	219	1	Each	✓	✓	Component	
☐ > Inverter	116	1	Each	✓	✓	Component	
☐ > Upper Rail	216	2	Each	✓	✓	Component	
☐ > Battery Adapter 18v	15	1	Each	✓	✓	Component	
☐ > Charge Controller	88	1	Each	✓	✓	Component	

- 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 "Solar Starter Kit". Please create product hierarchy for this Product

- d. Select the quantity required to make this product and click Save.
 e. You will be taken back to the Product Hierarchy tab.
 f. Expand selected product to see its children

2. You can also add components to a Product Bundle.

3. Users have different options on this page to delete hierarchy, edit hierarchy, show details of product, etc.

IX. 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.
4. Next, 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.*

5. Typically, when an opportunity is Closed/Won, the next step is to create a SoClo Fulfillment Order from within the opportunity by clicking the “SoClo Generate Fulfillment Order” (FO) button. However, you can generate the FO from any opportunity stage.

[View All](#)



SoClo Fulfillment Orders (1)

1 item • Sorted by Fulfillment Order Number • Updated a few seconds ago

	Fulfillment Order Number ↓	Status	Start Date
1	FO-00000001	Draft	9/27/2022, 10:58 AM

[View All](#)


SoClo Fulfillment Order
FO-00000001

[Edit](#)
[Consume Inventory](#)
[Create Asset](#)
[Create Purchase Order](#)
[Change Owner](#)
[Sharing](#)

Inventory Reserved
N/A
 Inventory Consumed
0 of 50

Related List Quick Links

- [SoClo Product Required \(1\)](#)
- [SoClo Inventory Requests \(0\)](#)
- [SoClo Inventory Transfers \(0\)](#)
- [SoClo Inventory Consumed \(0\)](#)
- [SoClo Inventory Item Transactions \(0\)](#)
- [Open Activities \(0\)](#)
- [Activity History \(0\)](#)
- [Assets \(0\)](#)
- [SoClo Deliveries \(0\)](#)
- [SoClo Purchase Orders \(0\)](#)

Details

- Information

Fulfillment Order	FO-00000001	Record Type	No Bundles
-------------------	-------------	-------------	------------


SoClo Product Required (1)

- PR-000001

Product Re...	Solar Panel
Quantity R...	50.00
Available Q...	4.00

[View All](#)

IX. Create SoClo Fulfillment Orders

SoClo Fulfillment Orders track tasks to be performed to complete a Fulfillment Order.

Some examples where you would use a Fulfillment Order are:

- A customer has placed an order for product and you need to ship it to their location.
- Periodic maintenance is required on a customer asset that you need to schedule and service.

There are two record types for Fulfillment order: No bundle and Contains Bundle

No Bundle: A simple fulfillment where:

- All products are 'Buy' type and do not require any assembly to fill the order.
- These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse.

Contains Bundle: A fulfillment where:

- At least one product is 'Make' type and
- Assembly is needed to complete the fulfillment.

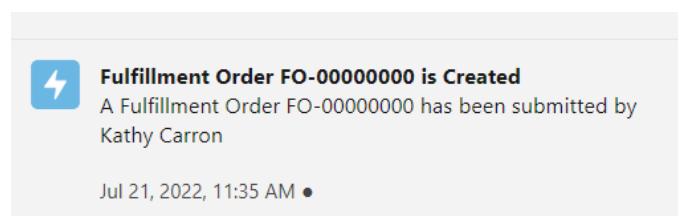
*These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse

See Scenario section for more examples and workflows.

Scenario 1: Here is an overview of the No Bundles, No WIP scenario. Product is in stock in local warehouse so no transfers are needed.

1. From within the Opportunity, click SoClo Generate Fulfillment Order. (Remember that **products must first be added to the opportunity**, or you will get an error here).
2. Click save.
3. You will get the confirmation of Fulfillment Order created for the opportunity.

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.



Click the Consume Inventory button.

- a. If there is enough inventory in the local warehouse, then you will be able to save your record and SoClo Inventory Consumed Records will be created which you can view on the related list.
- b. If there is NOT enough inventory in the source location, you will follow the Process to Request Inventory /Transfer Inventory or Place a PO with a vendor. (Other locations will be checked for stock and you will be walked through each process).
- c. Create a Delivery to track shipment.
- d. Create Asset.

Fulfillment Order: Scenario 2: 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.

After entering the header, then add your Inventory Request line items for each needed part.

1. From the SoClo Inventory Requests tab, click New.
2. If the request is being made for a particular job, you can associate it here by selecting the related Fulfillment Order or Account or Case).
3. Enter the Destination location, which is where the parts are needed.
4. Select a shipment type/priority and enter the Need By Date.
5. Add a description.
6. Assign a status to the inventory request:
 - 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.
7. Save your changes.

 SoClo Inventory Request
IR-0000000

Related List Quick Links ⓘ

 [SoClo Inventory Request Line Items \(1\)](#)
 [SoClo Inventory Transfers \(0\)](#)

Details

Inventory Request Number	IR-0000000	Owner	 Kathy C
Account	Acme	Status	Submitted
Case		Destination Location	Cocoa Beach Warehouse
Fulfillment Order		Shipment Type	Rush
		Need By Date	

▼ Detail

Description

Created By  Kathy C, 9/27/2022, 9:52 AM

Last Modified By  Kathy C, 9/27/2022, 10:37 AM

In App Guidance Steps for Inventory Request Line Item

1. Request inventory from one location to another location using the New button on the top right.
2. Details pertaining to the request are captured here including when you need the inventory and to which location. Once your request has been saved, enter the necessary products in the Inventory Request Line Items related list.
3. Create multiple product request line items for a request. Once all the request line items have been created, set the status of the product request to "Submitted". It will then notify the user(s) in the notification group. Click "New to add.
4. Here you can specify each product and quantity requested. Each product will need to be entered as a separate line item.
5. Once all the Request Line Items are specified, update the status of the SoClo Inventory Request to "Submitted". The Submitted status will trigger the notification to the user(s) of the inventory group.

SoClo Inventory Request Line Item
PRLI-0000001

Details

Inventory Request Line Item Number	PRLI-0000001	Parent	IR-0000000
Product	Deep Cycle Battery	Quantity Unit Of Measure	Each
Quantity Requested	5	Need By Date	
Description		Status	Submitted
Shipping Information			
Shipment Type	Rush	Destination Location	Cocoa Beach Warehouse
Created By	Kathy C, 9/27/2022, 10:21 AM	Last Modified By	Kathy C, 9/27/2022, 10:37 AM

1. When the Inventory Request is ready for processing, update the status of SoClo Inventory Request to Submitted.
2. As soon as the status has been updated to Submitted, custom notifications will be generated for the selected users that were added to the custom notification group.

A inventory request IR-0000000 has been submitted

A inventory request IR-0000000 has been submitted by Kathy C for inventory transfer.

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

Thanks,
SoClo Inventory App

3. Once the Inventory Request has been received by the person responsible, they should update the status to Received. Refer to the next section, "Inventory Transfers" which are typically created in response to an inventory request.

X. SoClo Inventory Transfer

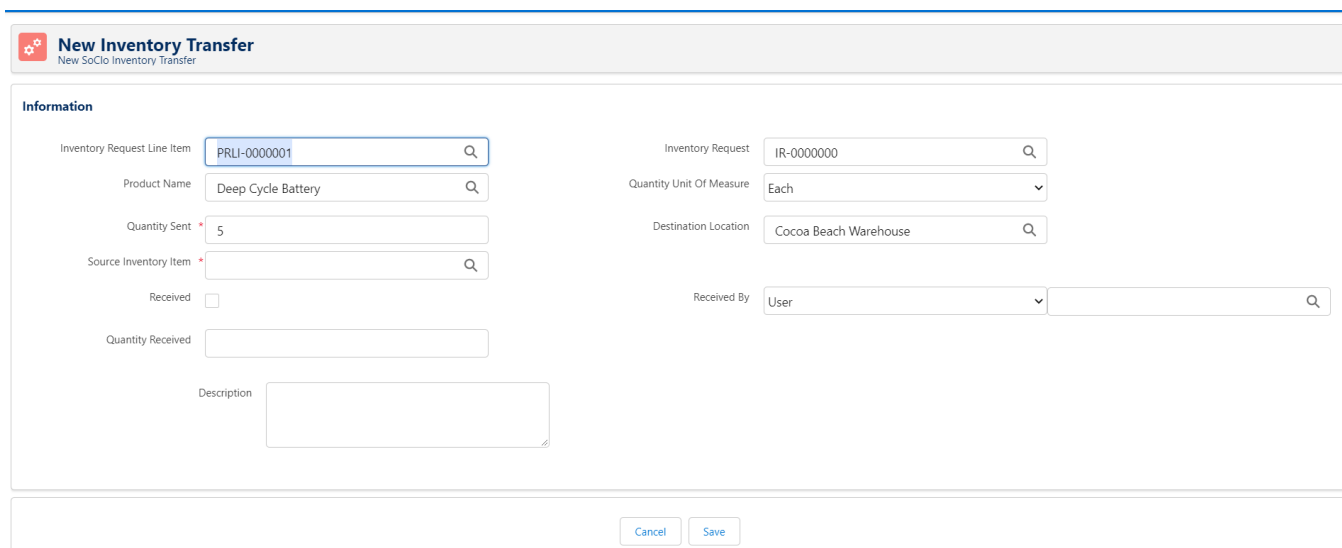
An Inventory transfers document inventory movements of items between locations.

In most cases, you will create an inventory transfer in response to having created an inventory request, but that is not always the case.

For example, a salesperson might need to keep sample stock in their vehicle for customer visits. For this you would create a series of initial inventory transfers to track the movement of the inventory from one warehouse to the salesperson's vehicle.

Another example is if we need to fill a customer order, and stock is available in one warehouse, but we need it moved to ship out of another warehouse.

1. Navigate to the SoClo Inventory Transfer tab and click New. (Note: If the Inventory Transfer record is created for an inventory request line item, then most of the fields are already pre-filled from that Inventory request record.)
2. Next, enter the quantity needed and select the source location.
3. Save your changes.
4. You might need to refresh the inventory request line item if it is created from there.



5. 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.

Changing the status to “**Received**” on a SoClo inventory transfer indicates that the items have been added to the inventory at their destination location and prompts the following actions:

1. Inventory items are updated or created.
2. Inventory item transactions are created.

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.

Related				Details	
Product Transfers (1)				New	
Product Transfer Number	Source Product Item	Quantity Sent	Received	Edit	
PT-0000000	PI-0000009	10.00	☐	Delete	
View All					
Return Order Line Items (0)				New	

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

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

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

If an inventory transfer has not yet been marked received, you can edit it. 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 locations.

XI. Create a Product/Product Bundle

Some companies may have the need to use the Product Bundle feature to build assemblies in their manufacturing process. There may be situations where you will need to keep safety stock on hand and therefore will make products/product bundles in advance of orders for upcoming opportunities. In that case, you would use the product/product bundle feature and configure them by choosing which Components are needed to build each bundle. When you have all the quantity for each component in stock, you will need to consume the parts/components which reduces the inventory count at the warehouse location and adds the product to inventory as an inventory item.

Some things to keep in mind:

There must be availability on hand for all of the products/components in the location where you are making the product to create the product bundle.

If there is no stock on hand, you will not be able to create the bundle and will receive the following error.

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

If you receive the error message, you will likely need to create an inventory request and inventory transfer between locations if there is stock at another warehouse. Otherwise, you may need to place a PO with a vendor to bring in more inventory.

A. Go to Opportunity

- i. Create Opportunity from Account
- ii. Add product Solar Panel System 4000
- iii. Set quantity to 1
- iv. Click the SoClo Generate Fulfillment Order button.
- v. Select "Some products are 'make' type and need to be assembled to complete this fulfillment."

B. Fulfillment - What are the 2 Types of Fulfillment Orders?

WIP and Non WIP

WIP stands for 'Work In Progress'. By default, a WIP location is not set on a fulfillment, but you can add WIP location and WIP transfers will be open to you.

Listed below are the two paths of a fulfillment.

1. WIP

- i. Add WIP Location
- ii. WIP Transfer - If some items are not available to transfer, you can create POs and order them
- iii. Create Bundle(s) - Once you have all components transferred to WIP location, you can build bundle from WIP components.
- iv. Consume Inventory - Once all bundles are built, you can consume
- v. Create Delivery – Optional
- vi. Create Asset – Optional

2. Non WIP

- i. Do not add WIP location
- ii. Create Bundle(s) - pulls components from the location on the fulfillment, if items are missing you can transfer from another warehouse or create a PO right from the fulfillment.
- iii. Consume Inventory - Once all bundles are built, you can consume.
- iv. Create Delivery - Optional
- v. Create Asset – Optional

Lastly, update the status on the fulfillment to complete.

See WIP location example below:

New SoClo Fulfillment Order

Select a record type

☐

No Bundles

A simple fulfillment where all products are 'buy' type and do not need to be assembled.

☒

Contains Bundle

Some products are 'make' type and need to be assembled to complete this fulfillment.

Cancel

Next











SoClo Inventory

SoClo Inventory

SoClo Short Cuts

SoClo Quick Setup

SoClo Location Map

SoClo Inventory Search

SoClo Fulfillment Orders

SoClo Inventory Items

SoClo Purchase Orders

SoClo Inventory Requests

More


SoClo Fulfillment Order
FO-00001964

Edit
WIP Transfer
Create Bundle(s)
Consume Inventory
Create Asset
Required Component List
Create Purchase Order
Change Owner
Sharing
Clone

Reserved
1 of 2
Consumed
0 of 2

Related List Quick Links

- SoClo Product Required (1)
- SoClo Inventory Transfers (10+)
- SoClo Product Bundles (1)
- SoClo Inventory Consumed (0)
- SoClo Inventory Item Transactions (10+)
- SoClo Inventory Requests (0)
- Assets (0)
- SoClo Deliveries (0)
- SoClo Purchase Orders (0)

Details
Activity

Fulfillment Order Number FO-00001964	Record Type Contains Bundle
Account GenePoint	Owner John Smith
Opportunity System Sale	Priority Low
Order	Status Draft
Locations	
Source Location Orlando Warehouse	WIP Location Orlando Warehouse WIP
Dates	


SoClo Product Required (1)

PR-001411

Product Required: Solar Panel System 4000
Quantity Required: 2.00
Available Quantity: 0.00

View All


SoClo Inventory Transfers (3+)

PT-0001205

Product: Solar Panel System 4000
Quantity Sent: 1
Destination Location: Orlando Warehouse WIP

PT-0001206

SoClo Fulfillment Orders > FO-00001964

SoClo Product Bundles

1 item • Updated a few seconds ago

	Product Bundle Name	Product	Type	Created Location
1	☐ Solar Panel System 4000-1	Solar Panel System 4000	Product Bundle	Orlando Warehouse WIP

SoClo Inventory

SoClo Inventory SoClo Short Cuts SoClo Quick Setup SoClo Location Map SoClo Inventory Search **SoClo Fulfillment Orders** SoClo Inventory Items SoClo Purchase Orders SoClo Inventory Requests + More

SoClo Fulfillment Orders > FO-00001964

SoClo Product Required

1 item • Updated a few seconds ago

	Product Required Number	Product Required	Quantity Required	Available Quantity	Included In Bundle	Quantity Consumed	Quantity Transferred
1	PR-001411	Solar Panel System 4000	2.00	0.00	☐		1.00

See Non WIP location example below:

New SoClo Fulfillment Order

Select a record type



No Bundles

A simple fulfillment where all products are 'buy' type and do not need to be assembled.



Contains Bundle

Some products are 'make' type and need to be assembled to complete this fulfillment.

Cancel

Next


SoClo Fulfillment Order
FO-00002332

[Edit](#)
[Consume Inventory](#)
[Create Purchase Order](#)
[Change Owner](#)
[Sharing](#)
[Clone](#)
[Delete](#)

Reserved

N/A

Consumed

7 of 7

Related List Quick Links

 [SoClo Product Required \(3\)](#)
 [SoClo Inventory Requests \(0\)](#)
 [SoClo Inventory Transfers \(0\)](#)
 [SoClo Inventory Consumed \(3\)](#)
 [SoClo Inventory Item Transactions \(3\)](#)
 [SoClo Deliveries \(1\)](#)
 [Assets \(0\)](#)
 [SoClo Purchase Orders \(1\)](#)

▼

Draft

Inventory Reserved

Awaiting Delivery

Completed

Cancelled

✓ Mark Status as Complete

Key Fields

Source Location

Orlando Warehouse

[Edit](#) **Guidance for Success**

Add location, products required, and any other initial details needed to create a fulfillment.

Details

Activity

▼ Information

Fulfillment Order Number

FO-00002332

Record Type

No Bundles

Account

GenePoint

Owner

John Smith

Order

Priority

Low

Opportunity

Status

Draft

SoClo Product Required (3)

PR-001849

Product Required: Inverter

Quantity Required: 1.00

Available Quantity: 18.00

PR-001850

Product Required: Foam Pad

Quantity Required: 1.00

Available Quantity: 91.00

PR-001851

Product Required: Solar Panel

Quantity Required: 5.00

Available Quantity: 97.00

SoClo Fulfillment Orders > FO-00002332
New
Display Product Hierarchy

SoClo Product Required

3 items • Updated a few seconds ago

	Product Required Number	Product Required	Quantity Required	Available Quantity	Included In Bundle	Quantity Consumed	Quantity Transferred
1	PR-001849	Inverter	1.00	18.00	☐	1.00	0.00
2	PR-001850	Foam Pad	1.00	91.00	☐	1.00	0.00
3	PR-001851	Solar Panel	5.00	97.00	☐	5.00	0.00



XII. Create Asset

Once the product(s) has been delivered and/or installed at the customer site, we recommend converting it to an Asset. The reason for this is that keeping track of Assets allows you to have visibility to the maintenance schedule that is recommended. This is a potential recurring sales opportunity.

For example, for the Solar Panel product, you may need to service them every 6 months, so you want to be able to reach out to your customers to inform them of that timeline and give them an estimate well in advance. It is easy to create an asset from within the Fulfillment Order simply by clicking the “Create Asset” Button.

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

If the Product has child products under them, then all the Child products can be converted to an Asset.

1. Navigate to the Fulfillment Order record. Click on the “Create Asset” button.



2. A list of all the consumed products for this Fulfillment Order will display.
3. The parent name displays which is inherited from the product hierarchy. When assets are created, an Asset hierarchy will be created too.
4. Select the products which need to be converted into an Asset. Click Next.
5. Choose an Asset name. (Quantity information pre-populates from the Product bundles).
6. If Products are installed at customer site, pick the installation date. Click Save.

7. Click on the Assets tab to view the list of 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

Q Search this list...

New

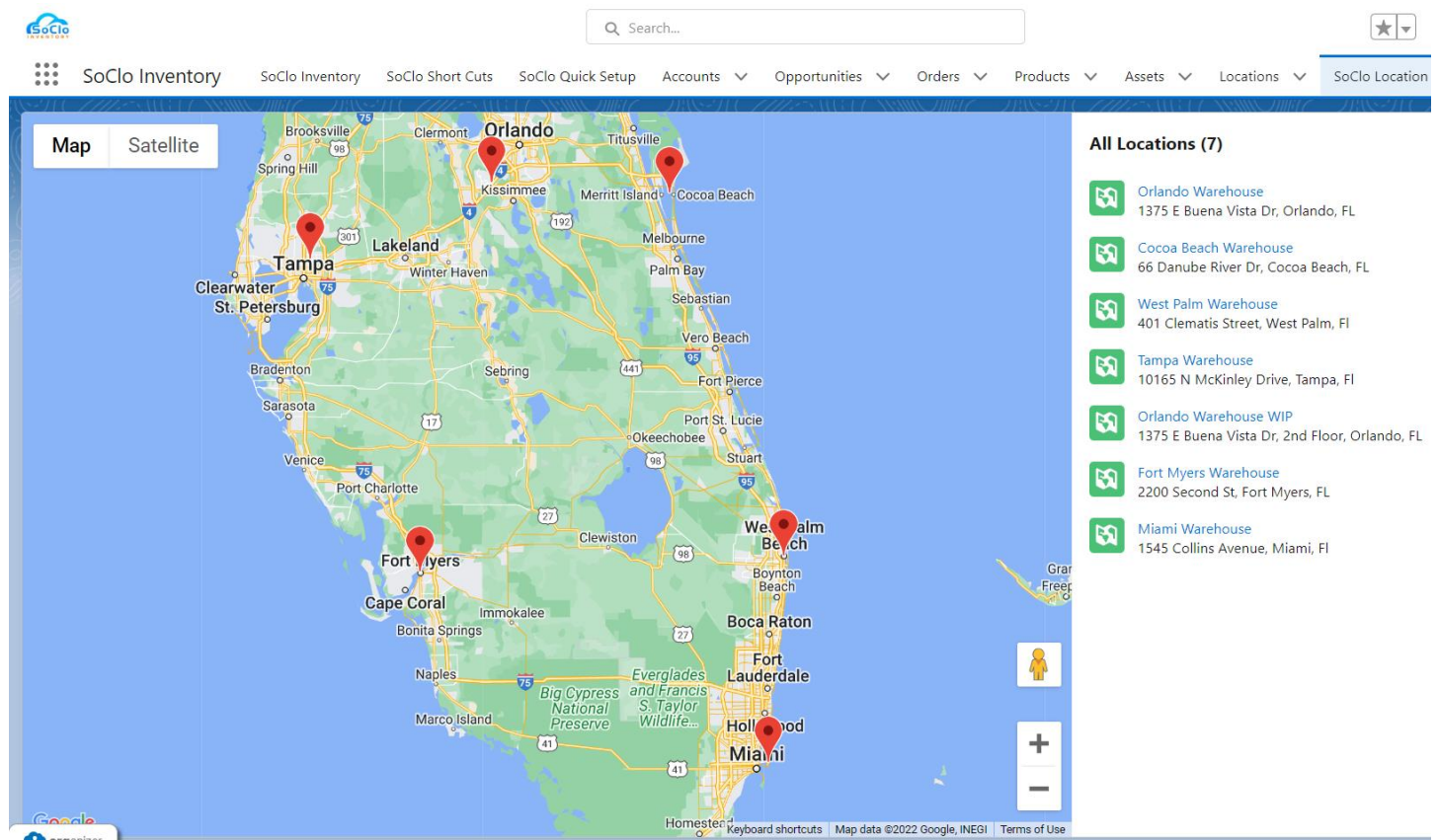
	Asset Name ↑	Serial Number	Install Date	Account Name	Contact Name	Product Name	
1	☐ Back Bumper 123			Acme		Back Bumper	▼
2	☐ Car123			Acme		Car	▼
3	☐ Exterior Assembly123			Acme		Exterior Assembly	▼
4	☐ Floor Mats 123			Acme		Floor Mats	▼
5	☐ Front Bumper 123			Acme		Front Bumper	▼
6	☐ Head Light Assembly 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	▼

8. You are also able to select an asset to view its Asset Hierarchy.

XIII. SoClo Location Map

SoClo Inventory Location Map is an easy way to view of all the warehouses at a glance. You can open a warehouse location by clicking on the location hyperlink on the screen. From there, you can view a list of the products in your inventory at that location.

***Note:** As a reminder, for the location to show on the map, it needs to first have a full address entered.



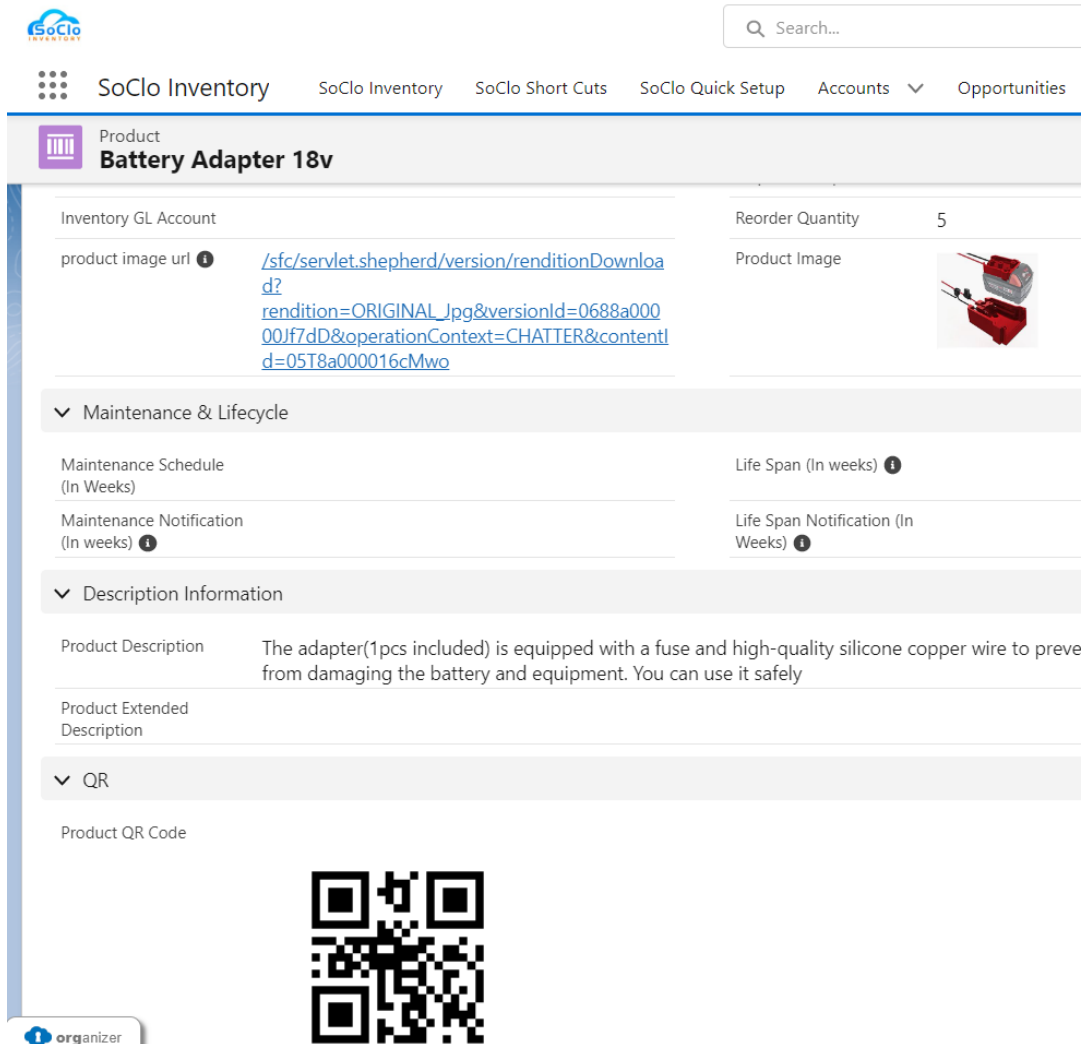
The screenshot displays the SoClo Inventory Location Map. The map shows Florida with red pins indicating warehouse locations. A sidebar on the right lists 'All Locations (7)' with their addresses. The top navigation bar includes 'SoClo Inventory' and various menu items like 'Accounts', 'Orders', and 'Locations'.

Location Name	Address
Orlando Warehouse	1375 E Buena Vista Dr, Orlando, FL
Cocoa Beach Warehouse	66 Danube River Dr, Cocoa Beach, FL
West Palm Warehouse	401 Clematis Street, West Palm, FL
Tampa Warehouse	10165 N McKinley Drive, Tampa, FL
Orlando Warehouse WIP	1375 E Buena Vista Dr, 2nd Floor, Orlando, FL
Fort Myers Warehouse	2200 Second St, Fort Myers, FL
Miami Warehouse	1545 Collins Avenue, Miami, FL

Note: You can also see the product location map on the product record by viewing the "Product Location Map" tab.

XIV. SoClo Scanner

With the SoClo Inventory app, you can 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. QR codes are for specific objects like Product, Asset, Account, etc. You can find the QR Code in details page of the object.



The screenshot displays the SoClo Inventory web application interface. At the top, there is a search bar and a navigation menu with options like 'SoClo Inventory', 'SoClo Short Cuts', 'SoClo Quick Setup', 'Accounts', and 'Opportunities'. The main content area shows the details for a 'Product Battery Adapter 18v'. It includes fields for 'Inventory GL Account', 'Reorder Quantity' (set to 5), 'Product Image' (with a thumbnail of a red battery adapter), 'Maintenance Schedule (In Weeks)', 'Life Span (In weeks)', 'Maintenance Notification (In weeks)', 'Life Span Notification (In Weeks)', 'Product Description' (stating the adapter is equipped with a fuse and high-quality silicone copper wire), 'Product Extended Description', and a 'QR' section with a 'Product QR Code' and a large QR code image. The bottom of the page features an 'organizer' logo.

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

XV. 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 Setup "Installed Packages" and click Uninstall SoClo Inventory App

XVI. SoClo Reports

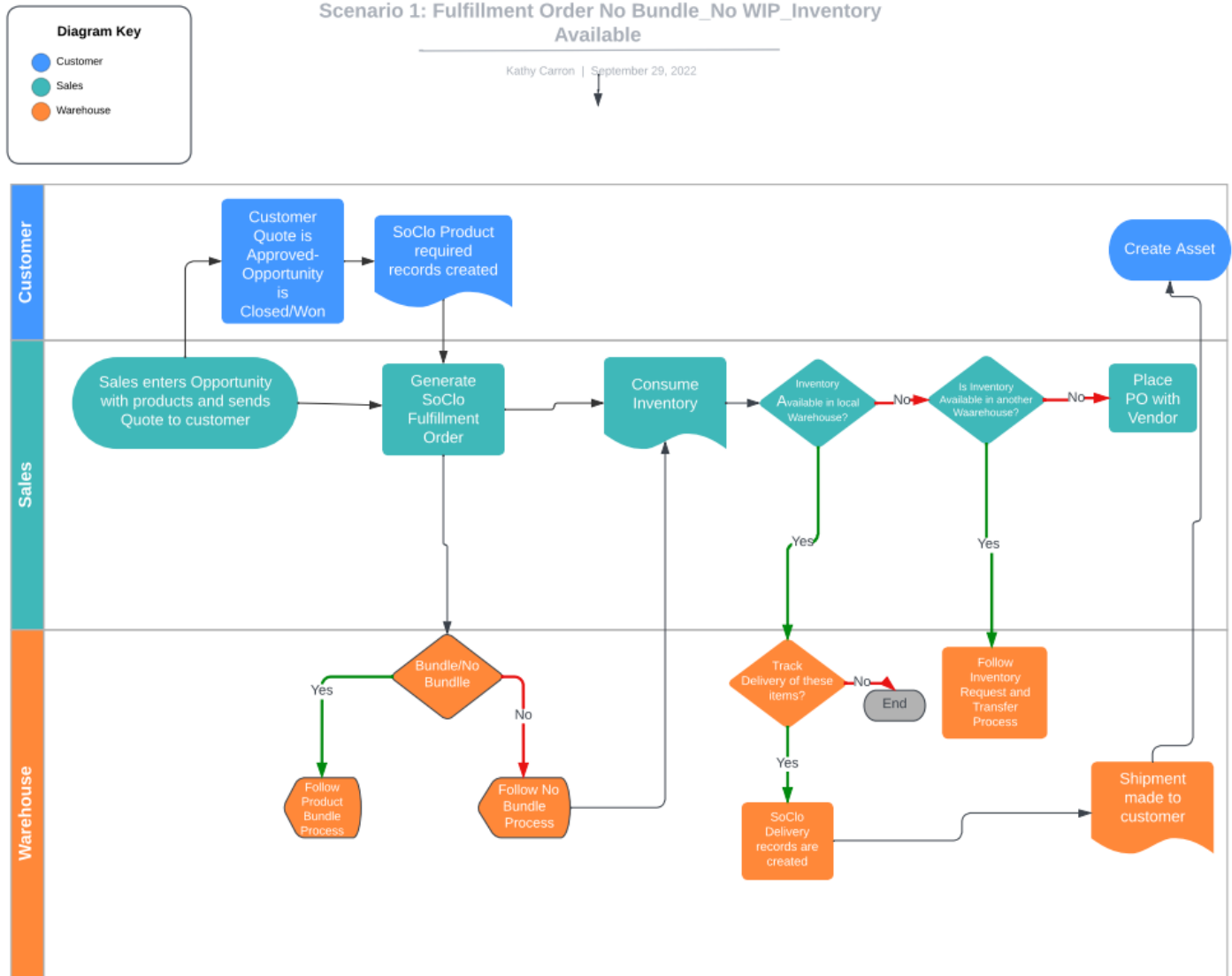
SoClo Required Items on PO Report
SoClo Inventory By Location
SoClo Inventory Items
SoClo Asset End of Life Count
SoClo Asset Maintenance Forecast Report
SoClo Asset Maintenance This Quarter
SoClo Asset End of Life Report
SoClo Inventory Total Value
SoClo Inventory Transactions - Summary
SoClo Inventory Valuation Report
SoClo Inventory Value
SoClo Products Required Report with PO

XVII. Troubleshooting

XVIII. Scenarios

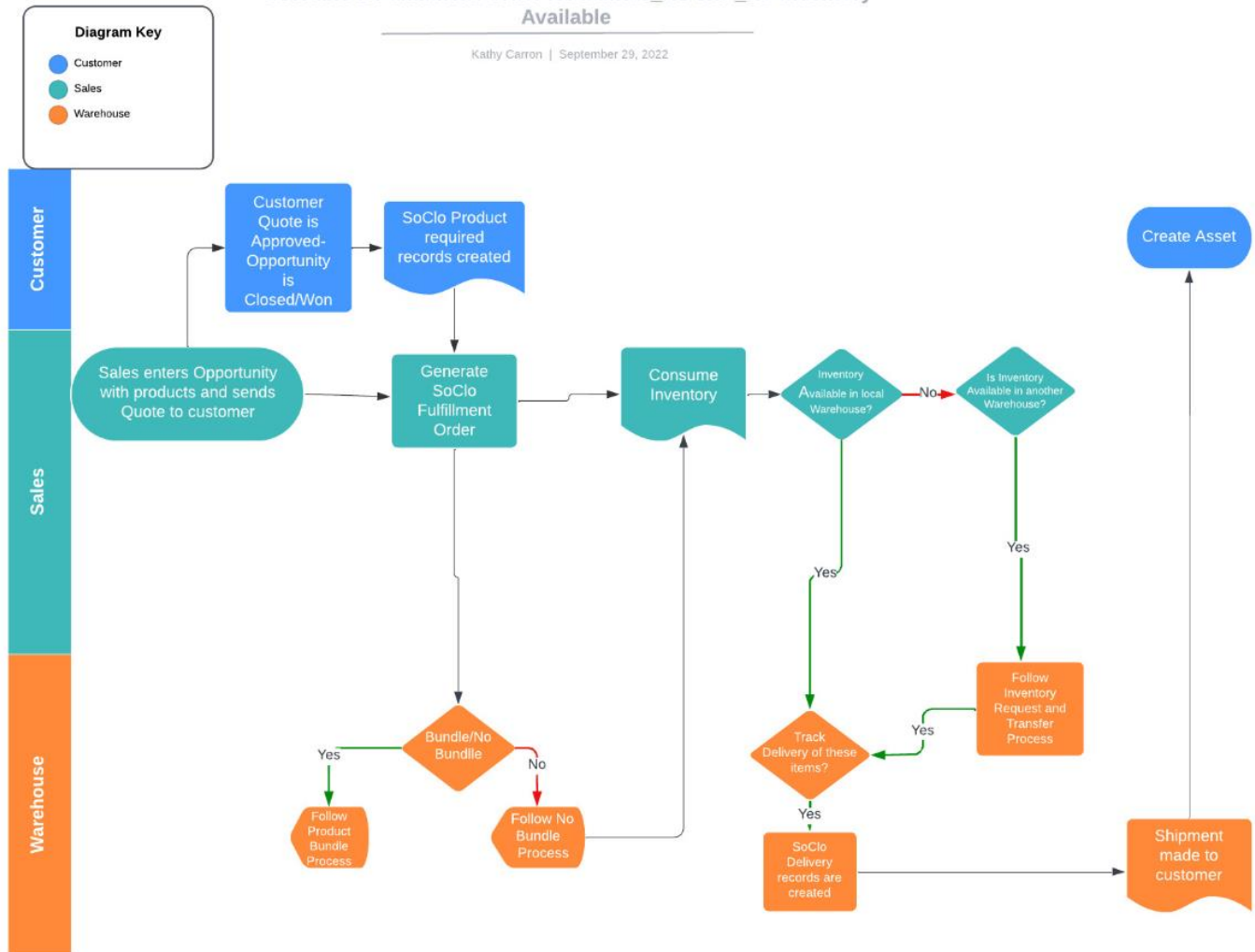
Scenario 1: Fulfillment Order No Bundle_No WIP_Inventory Available

Kathy Carron | September 29, 2022



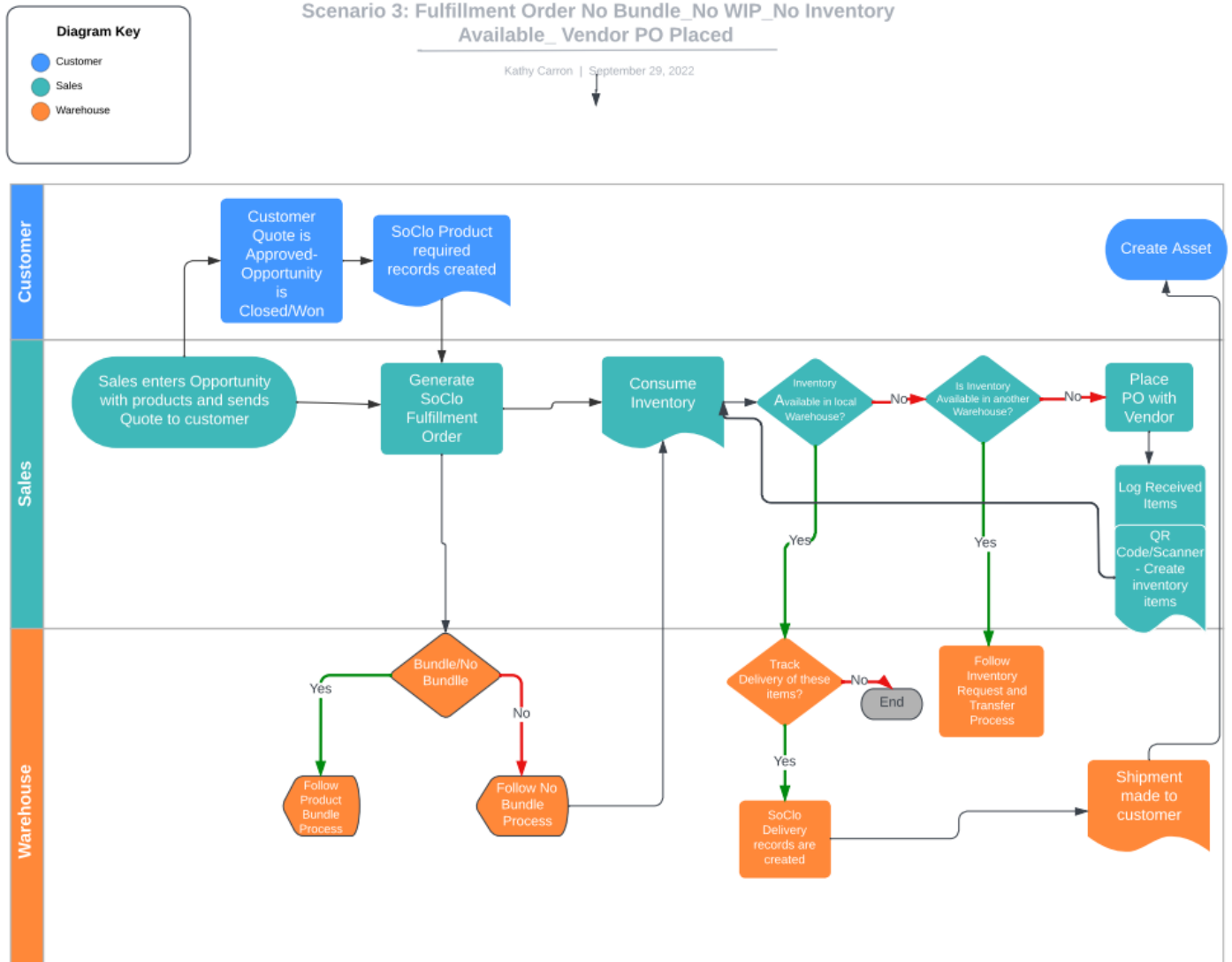
Scenario 2 Fulfillment Order No Bundle_No WIP_No Inventory Available

Kathy Carron | September 29, 2022



Scenario 3: Fulfillment Order No Bundle_No WIP_No Inventory Available_ Vendor PO Placed

Kathy Carron | September 29, 2022



Scenario 4: Inventory Transfer Process between Warehouses

Kathy Carron | September 29, 2022

Diagram Key

- Customer
- Sales
- Warehouse

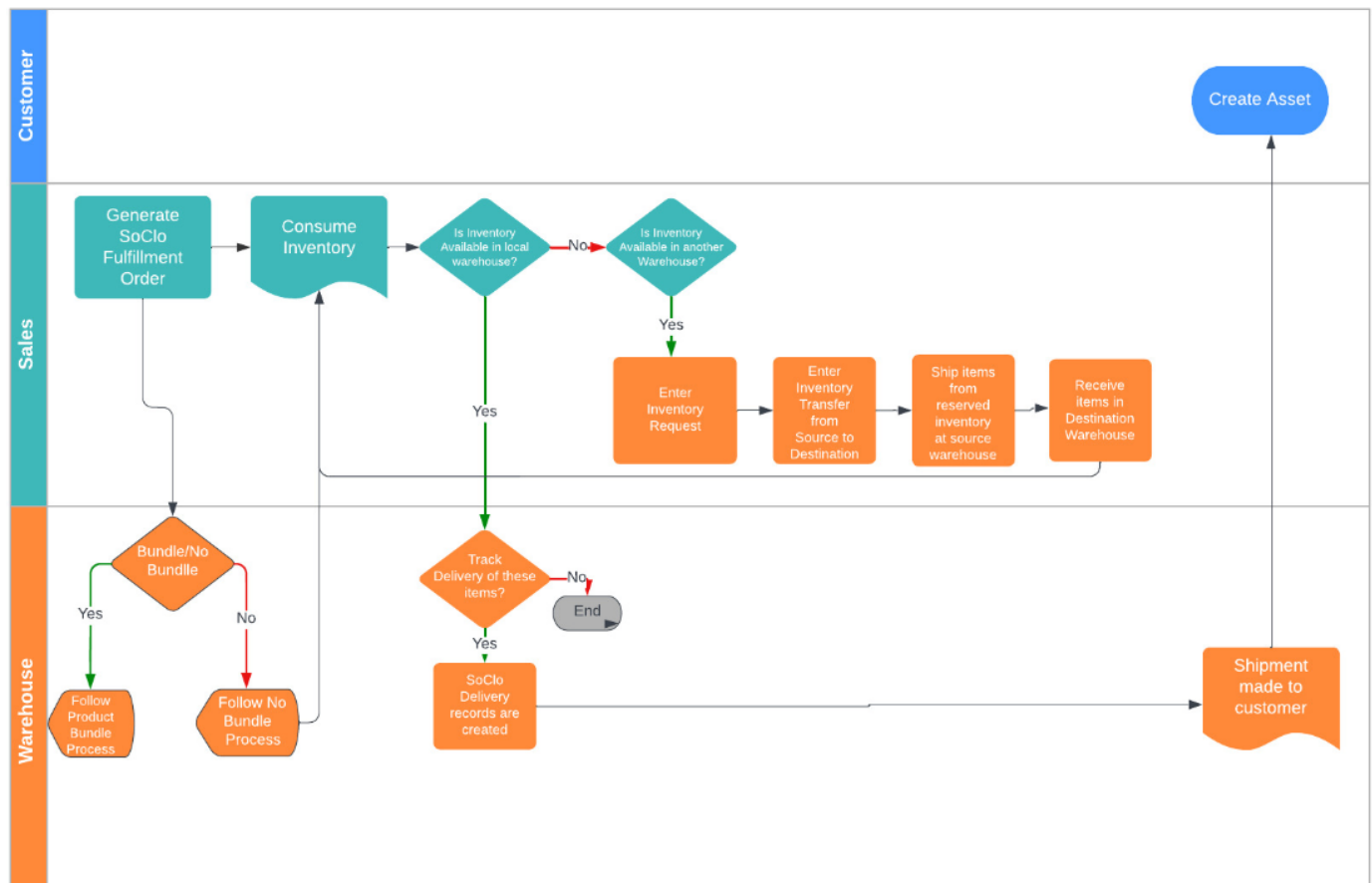
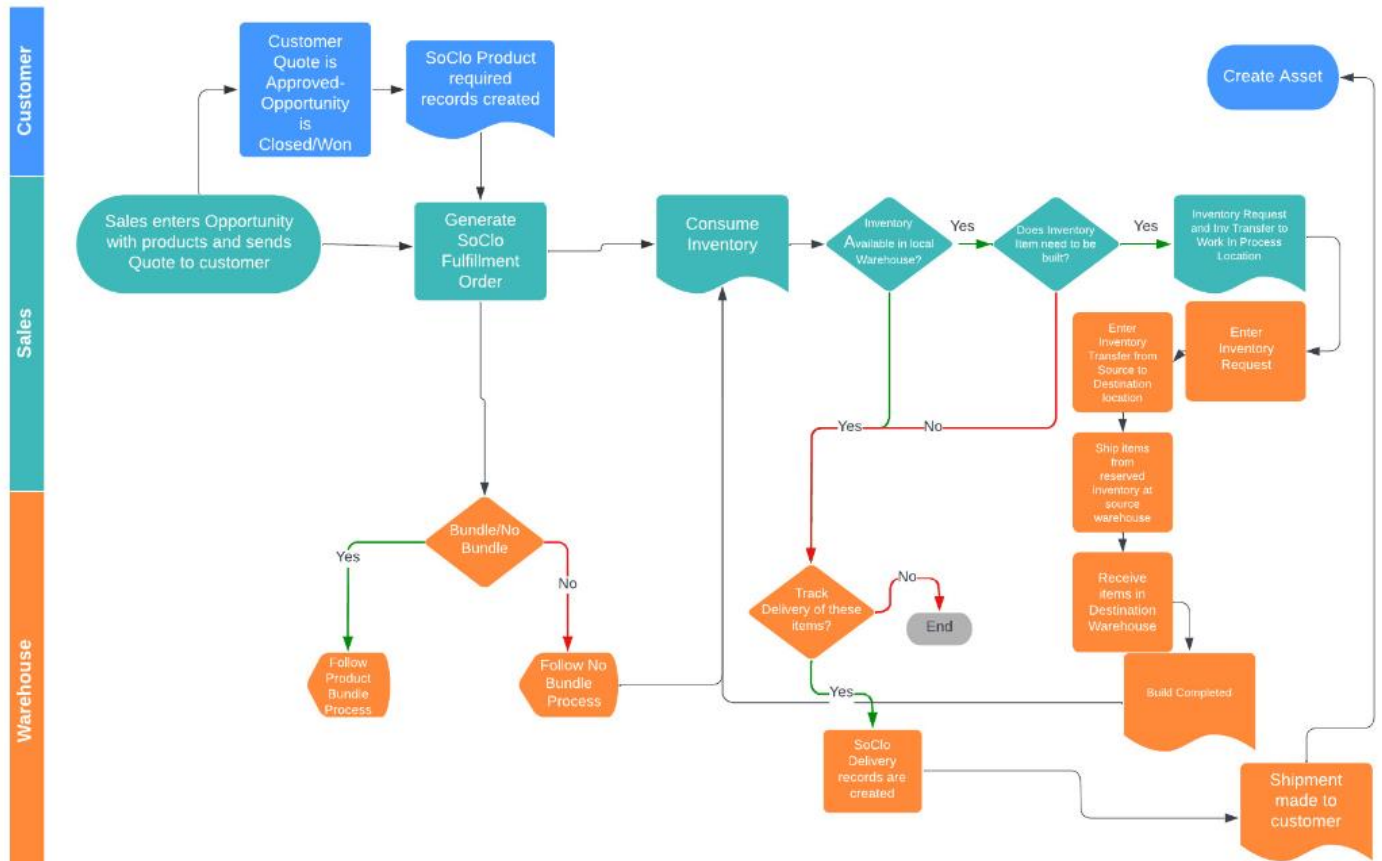


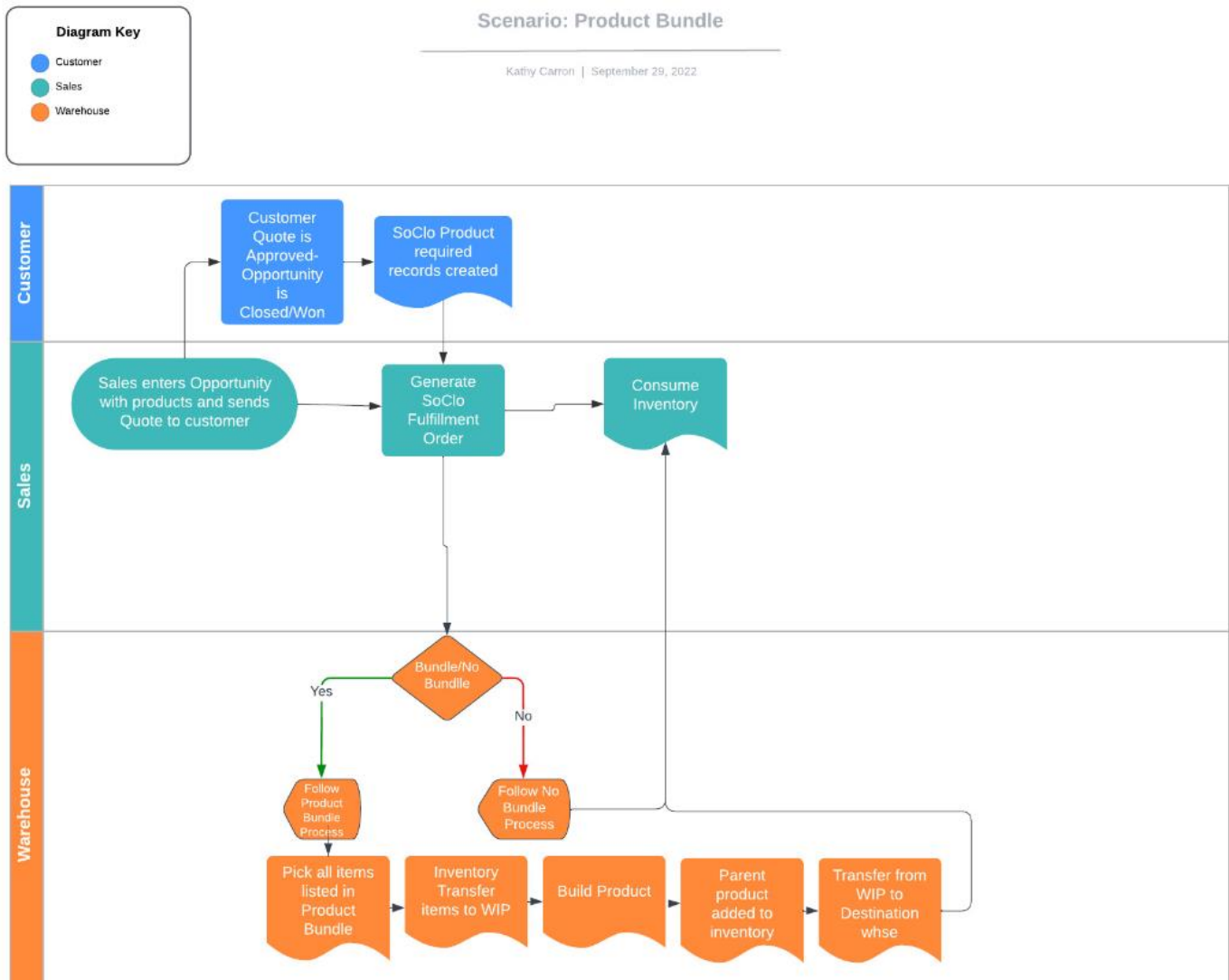
Diagram Key

- Customer
- Sales
- Warehouse

Scenario 5: Fulfillment Order No Bundle_with WIP

Kathy Carron | September 29, 2022





XIX. Glossary of Terms

Reorder Quantity: Reorder quantity is the amount we reorder from the vendor

Minimum Order Quantity: Minimum Required Quantity is the reordering point

Product Bundle: This pulls components from the location on the fulfillment, if items are missing you can transfer from another warehouse or create a PO right from the fulfillment.

Consume Inventory: Creates a product consumed record which subtracts the quantity consumed from the linked product item's quantity.

XX. 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	



Questions?



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