Building Digital Commerce Sales Catalogs

Exercise Guide

Version 1.1

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Preface

These training exercises are based on the Summer '21 release of Salesforce Industries Communications, Media, and Energy & Utilities Clouds. For additional information about the topics covered in this module, see the documentation available in Salesforce Industries/Vlocity Success Community at https://success.vlocity.com.

Overview

This training provides an overview of sales catalogs in the context of building Digital Commerce experiences. You will learn about creating a sales catalog and setting up product relationships with that catalog.

What You Will Learn

When you complete this training, you will:

- Understand how sales catalogs are linked to the Shared Catalog.
- Create sales catalogs.
- Create product relationships.

Prerequisites

The prerequisites for this training include a solid understanding of basic Salesforce concepts. You should also have a working knowledge of telecommunications, media, or energy and utilities industry business objectives. You should have a basic understanding of customer relationship management and configuration, pricing, and quoting. The prerequisite also includes completion of the following learning modules:

- Build Configure, Price, Quote (CPQ) Solutions for Industries
- Communications Data Model Overview

Exercise 1-1: Setting up a Sales Catalog

Scenario

Eliza is ready to create a brand-new Digital Commerce guided selling experience to prepare for the upcoming release of new mobile devices. Before she can start working with her UI Developer, Frances, to create the app itself, she needs to get the sales catalog ready. By creating a catalog with the new devices already associated with it, it will simplify Frances' site testing and development later on.

Goal

- Understand how sales catalogs are linked to the shared product catalog.
- Determine how to create sales catalogs.
- Create sales catalogs and product relationships.

Tasks

1. Set up the Catalog
2. Check the Products' Status
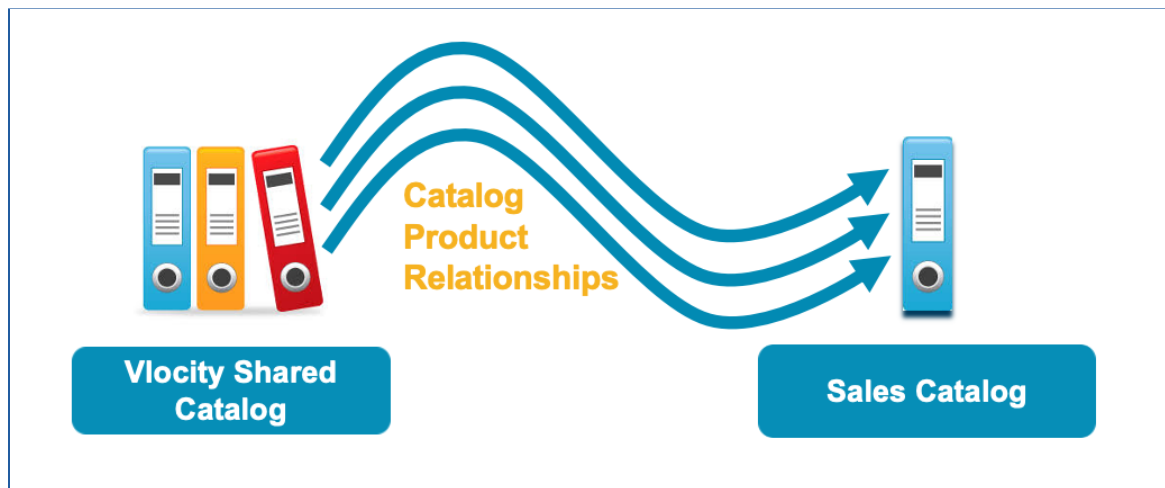3. Create Catalog Product Relationships

Time: 10 mins

ALERT:

If you've just received your training playground, add your email address to the system administrator profile to ensure you receive all system notifications. In the upper-right, click on the **Avatar** and select **Settings**. Enter your email address in the **Email** field on the Personal Information page and click **Save**.

What are sales catalogs?

Sales catalogs are a subset of products/promotions from the Shared Catalog. Sales catalogs are ideal for Digital Commerce apps because they can be curated for specific product marketing strategies. In order to start building a guided selling experience, you will need to first create an ecommerce sales catalog.

Sales catalogs are made up of **Catalog Product Relationships,** which define products and promotions included in the shared catalog.

For this exercise, you will create a catalog and associate some products with it.

Task 1: Set up the Catalog

1. Using the Lightning App Launcher [...] , search for **Digital Commerce**, and then select it.

2. In the Lightning navigation bar, click **Catalogs**.

3. Click **New** in the top-right corner.

4. In the **New Catalog** dialog, enter the following information.

Field	Value	Notes
Catalog Name	`Mobile Catalog`	
Catalog Code	`DC_MOBILE`	Catalog codes are used by DC Web Components, SDK, and APIs in order to retrieve and display products to the UI. Salesforce Industries recommends using a DC_prefix to easily identify DC catalogs. This value is not required to be unique.
Is Active	✔	This field must be set to active as it is enforced.
Start Date Time	**[yesterday's date]**	The Start Date Time is enforced. If you select today's date, it will default to 12 PM which is midday. For that reason, you will select yesterday's date to ensure the catalog will be active right now.
Description	`Digital Commerce Catalog for Mobile Phones`	
Default Price List	`B2C Price List`	All of the products in a catalog should be on the same price list. This price list will be used to look up the price list entry of the products that are included in the catalog.

> **NOTE:**
> The **Vendor**, **Is Catalog Root**, and **Source Type** fields are not currently used by the cacheable APIs and will not be reflected in your guided selling experience. The **Vendor** field can lookup an Account record for the sales catalog for reference purposes and has no impact on catalog products.

5. Click **Save**.

Task 2: Check the Products' Status

Eliza's first priority is getting the new mobile devices up on her new digital commerce app. Before she adds them to her new digital commerce catalog, she needs to make sure that they are marked as active and have price entries in the shared catalog.

In this exercise, the products are already entered into the shared catalog for you.

1. In the Lightning navigation bar, click **Vlocity Product Console**.

2. In the Dashboard under Product Management, click the **search icon** 🔍 next to **Product**.

3. Click the **search icon** 🔍 .

4. Ensure the following products are present and marked as **Active** in your training playground:

    a. **Google Pixel2**
    b. **Samsung Galaxy S10**

> ⚠ **ALERT:**
> Products must be marked **active**, **orderable**, and have a valid **selling start/end date** otherwise they will not be returned in the API response and will not be cached.

Click on each product and check the **Pricing** facet to ensure it has at least one price entry defined for the **B2C Price List**.

Task 3: Create Catalog Product Relationships

1. In the Lightning navigation bar, click **Catalogs**.

2. Click **Mobile Catalog**. - End Bookmark for Task Overview TOC

3. Click the **Related** tab header.

4. Next to Catalog Product Relationships (0), click the **New** button.

5. In the **New Catalog Product Relationship** dialog, enter the following information.

Field	Value	Notes
Catalog Product Relationship Name	Google Pixel 2	
Catalog	**Mobile Catalog**	
Product	**Google Pixel2**	
Effective Date	**[yesterday's date]**	The Effective Date is enforced. You will select yesterday's date to ensure the catalog relationship will be active right now.
Is Active	✔	

> **NOTE:**
> The **Sequence Number** field can be used to manipulate which offers show first in the offer list. We will not be using it for this exercise.

6. Click **Save**.

7. Repeat the previous two steps for Samsung Galaxy S10. Eliza's first sales catalog is now created and has products associated with it.

> **ALERT:**
> This catalog's products have not yet been cached and are therefore not yet available to the Digital Commerce cacheable APIs.

Review

Confirm your understanding by answering these questions.

1. How does a sales catalog differ from the Shared Catalog?

2. What designation must products have to be returned by the API response?

3. What are catalog codes used by?

4. How do you associate products with a sales catalog?

Yay! All done!