Products and Assortments Configuration and Management

Platform Group

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Table of Contents

1 Products 4

1.1 Access Products Object and Tab 4

1.2 Create a Product 4

1.3 Edit a Product 5

1.4 Delete a Product 5

1.5 Clone a Product 5

2 Product Assortment 7

2.1 Access Assortment Object and Tab 7

2.2 Configuring Product Assortment 7

2.3 Managing an Assortment 10

2.3.1 Edit an Assortment 11

2.3.2 Deactivate an Assortment 11

2.3.3 Clone an Assortment 11

* [Products](#scroll-bookmark-2)
  + [Access Products Object and Tab](#scroll-bookmark-3)
  + [Create a Product](#scroll-bookmark-4)
  + [Edit a Product](#scroll-bookmark-5)
  + [Delete a Product](#scroll-bookmark-6)
  + [Clone a Product](#scroll-bookmark-7)
* [Product Assortment](#scroll-bookmark-8)
  + [Access Assortment Object and Tab](#scroll-bookmark-9)
  + [Configuring Product Assortment](#scroll-bookmark-10)
  + [Managing an Assortment](#scroll-bookmark-11)
    - [Edit an Assortment](#scroll-bookmark-12)
    - [Deactivate an Assortment](#scroll-bookmark-13)
    - [Clone an Assortment](#scroll-bookmark-14)

|  |
| --- |
| The information present here assumes that you already have the **Products Managed Package** installed in your Salesforce account. Check [Products Managed Package Details](https://pitcher-ag.atlassian.net/wiki/spaces/PG/pages/245006343/Products+Managed+Package+Details) for more details. |

# Products

A Product is a standard Salesforce object that represents a service or an item that the company sells to its customers. In the Instore application, a product is usually created to represent a service or an individual product that is later grouped along with other products in an [assortment](#scroll-bookmark-15) and allocated to customer accounts to let the sales representatives know about them while interacting with the customer.

## Access Products Object and Tab

To access the object:

1. Log in to Salesforce.
2. In the **App Launcher**, click **Products** to navigate to the **Products** tab.

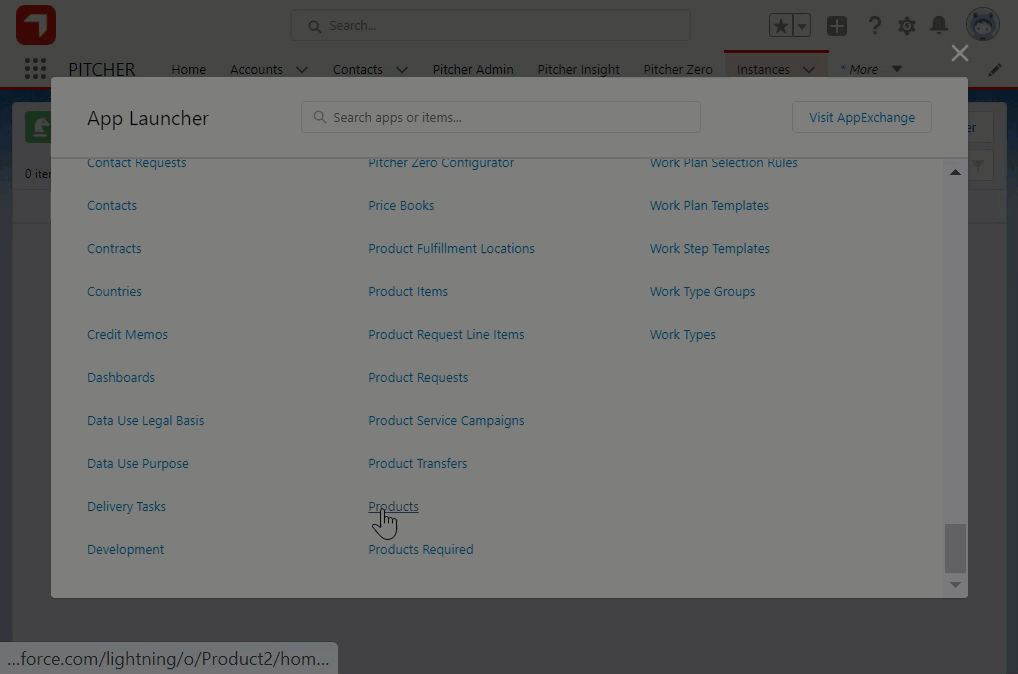


Figure 1 Accessing the Products Object and Tab

The **Products** tab contains a grid layout that contains a list of all Products. You can click on any of them to view the Product details.

## Create a Product

To create a Product:

1. In the **Products** tab, click **New**.
2. In the **New Product** dialog that appears, set the following fields and click **Save** to create the Product:

|  |  |
| --- | --- |
| **Field Name** | **Description** |
| Product Name | The name of the Product. |
| Product Code | A unique identifier of the Product. |
| Active | Determines the state of the Product post its creation. |
| Product Family | The Product Family it belongs to (if applicable). |
| Product Description | Text that describes the Product. |

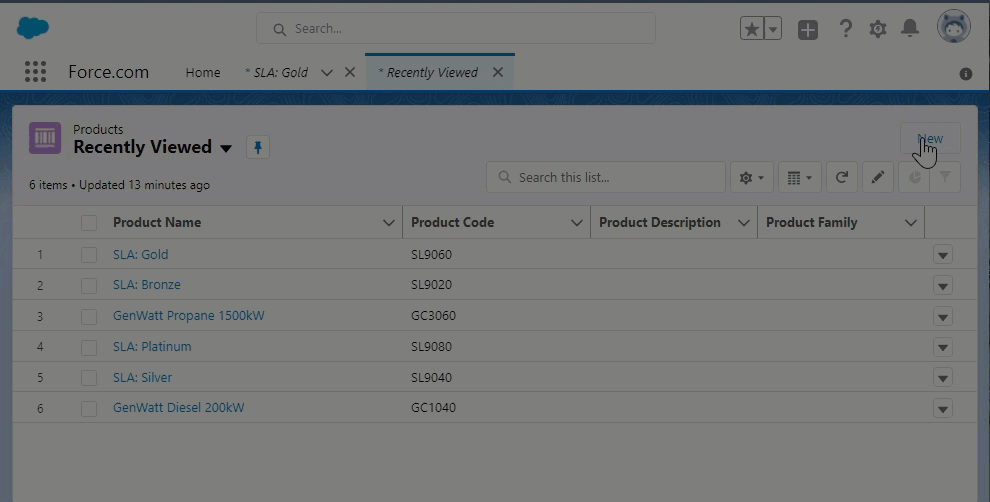


Figure 2 Creating a Product

## Edit a Product

To edit a Product:

1. In the **Products** tab, click the product you wish to edit.
2. On the **Product Details** page, click **Edit**.
3. Do the required changes and click **Save**.

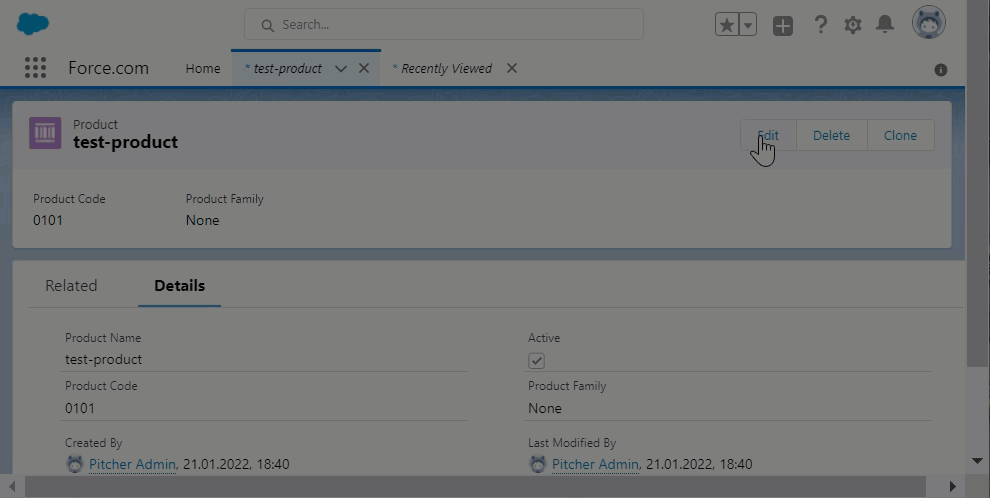


Figure 3 Editing a Product

## Delete a Product

To delete a Product:

1. In the **Products** tab, click the product you wish to delete.
2. Click **Delete**.
3. Confirm to delete.

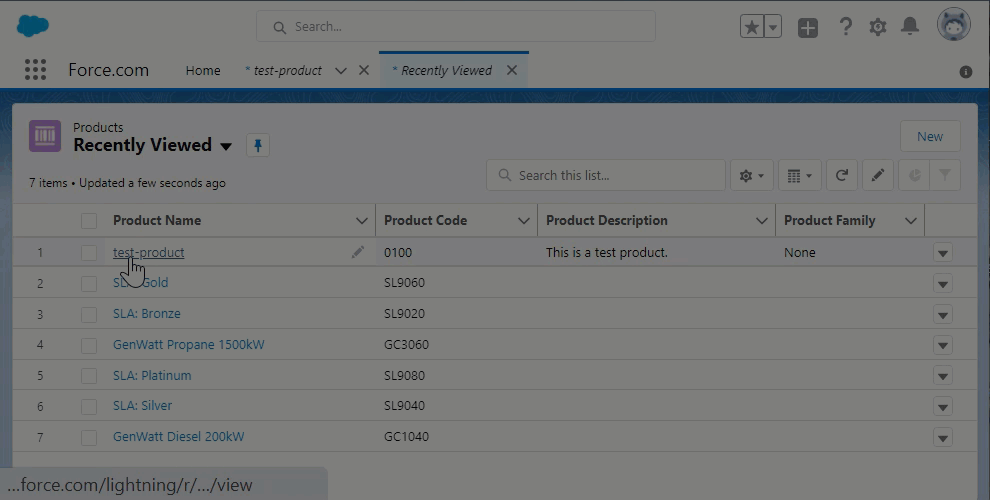


Figure 4 Deleting a Product

## Clone a Product

To clone an existing product object:

1. In the **Products** tab, click any product.
2. On the Product page, click **Clone**.
3. In the **New** **Product** dialog that appears, leave the configuration as it is or make changes to the details as needed.
4. Click **Save** to create the clone record.

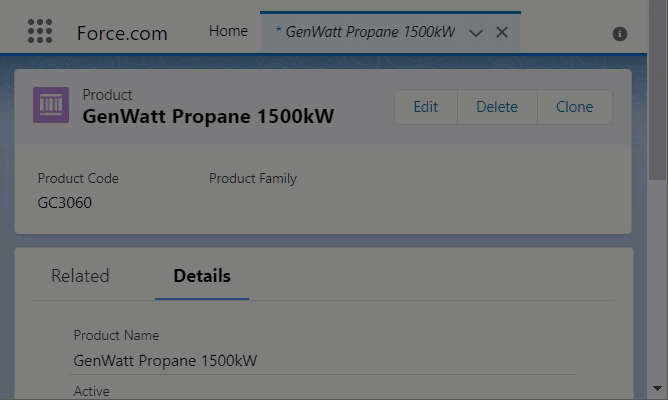


Figure 5 Cloning a Product

# Product Assortment

In Instore, a product assortment represents a number of products that are grouped together and allocated to customer accounts based on different criteria.

## Access Assortment Object and Tab

To access the object:

1. Log in to Salesforce.
2. In the **App Launcher**, click **Assortments** to navigate to the **Assortments** tab.

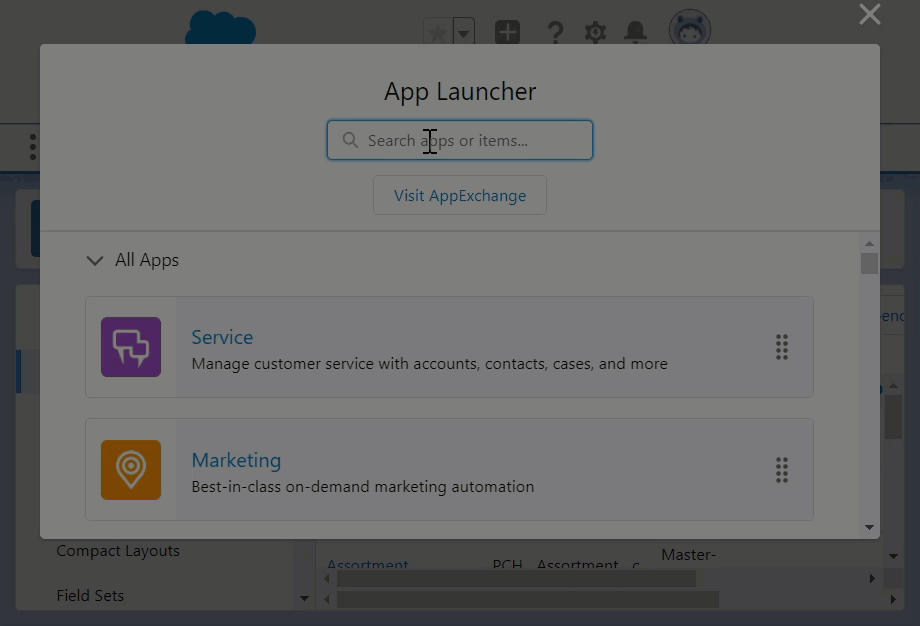


Figure 6 Accessing the Assortment Object

## Configuring Product Assortment

To create an assortment:

1. In the **Assortments** tab, click **New**.

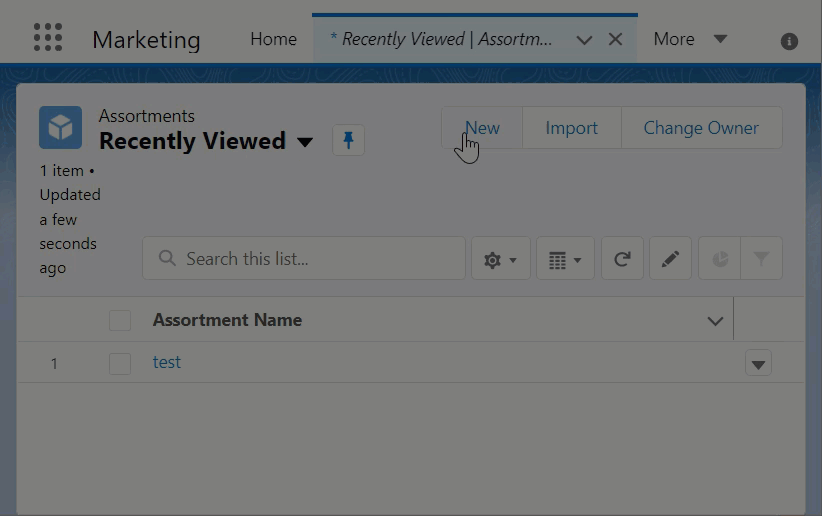


Figure 7 The New Assortment button

1. In the **Assortment Details** dialog that appears, set the following fields to define the meta-details of a new assortment object:

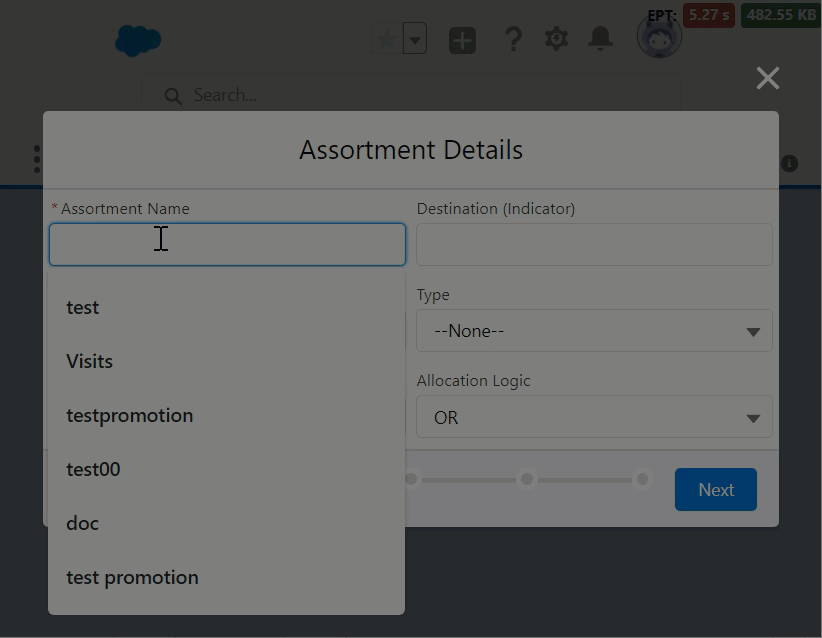


Figure 8 Configuring Assortment details

* + **Assortment Name** - The name of the Assortment.
  + **Destination (Indicator)** -
  + **Allocation** - This field is set to Account by default since you're going to be allocating the assortment to accounts in the next step.
  + **Type** - Select **Product Assortment** from the dropdown.
  + **Sharing Code** - Enter a code to map a sharing rule to define the visibility of the assortment.
  + **Allocation Logic** - Choose AND or OR logical operator depending on the need.

1. Click **Next** to move to the **Product Selection** page and select the products you would like to add to the assortment.

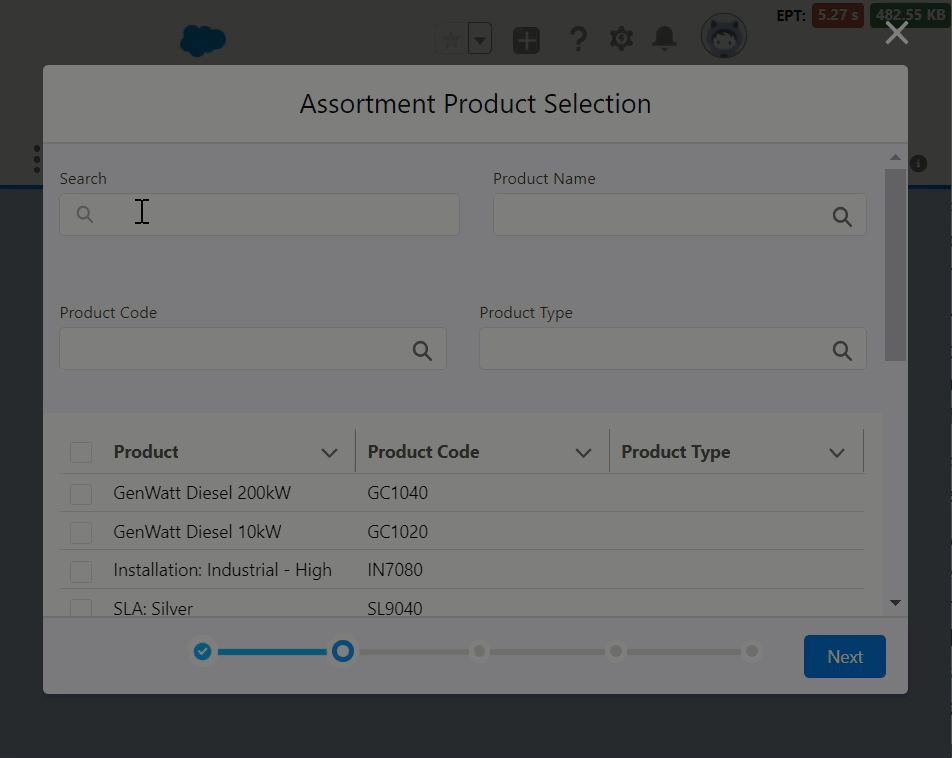


Figure 9 Selecting Products for Assortment

On this page, you can:

* + Select multiple products one by one using the checkboxes in the grid.
  + Search products
  + Filter products by:
    - **Product Type**
    - **Product Name**
    - **Product Code**
  + The page appears in a grid format with the following columns:
    - **Product Name**
    - **Product Code**
    - **Product Type**

1. Click **Next** to see the detailed grid view of all the selected products on the **Assortment Selection Details** page.

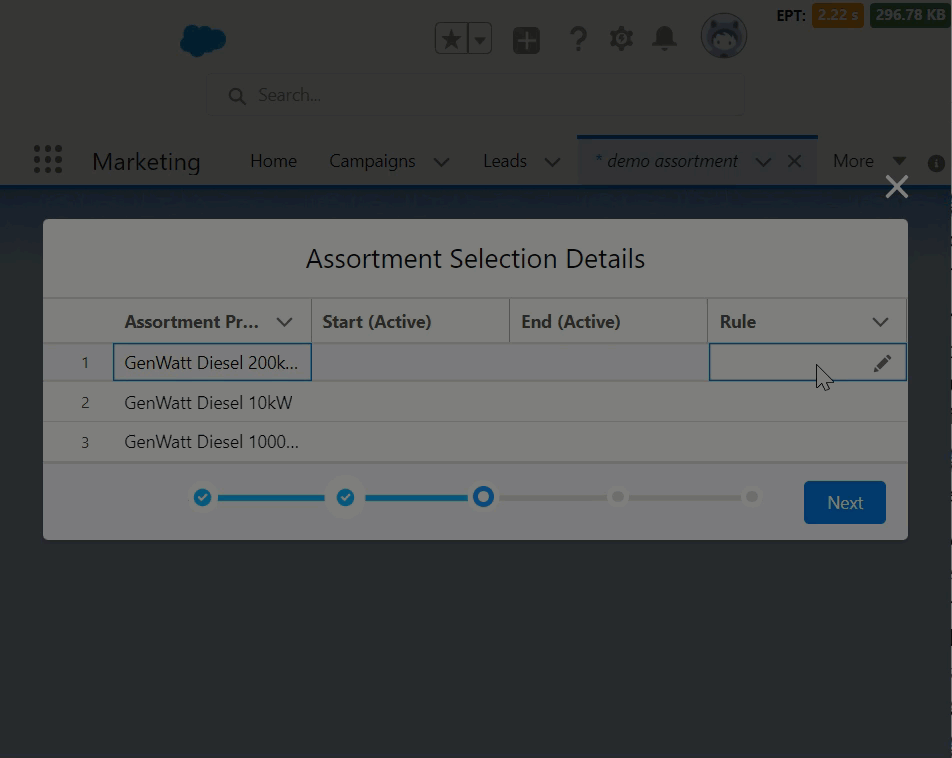


Figure 10 Defining Rules and Validity

On this page, you can:

* + Define if the product is to Include or Exclude in the Assortment.
  + Define the validity period of the Product to be part of the Assortment using the Start and End dates. The end date can be left blank if required.

1. Click **Next** to allocate the Assortment to the accounts based on the following criteria:
   * **Individual Accounts** - You can add one or more accounts to include or exclude from the assortment allocation.

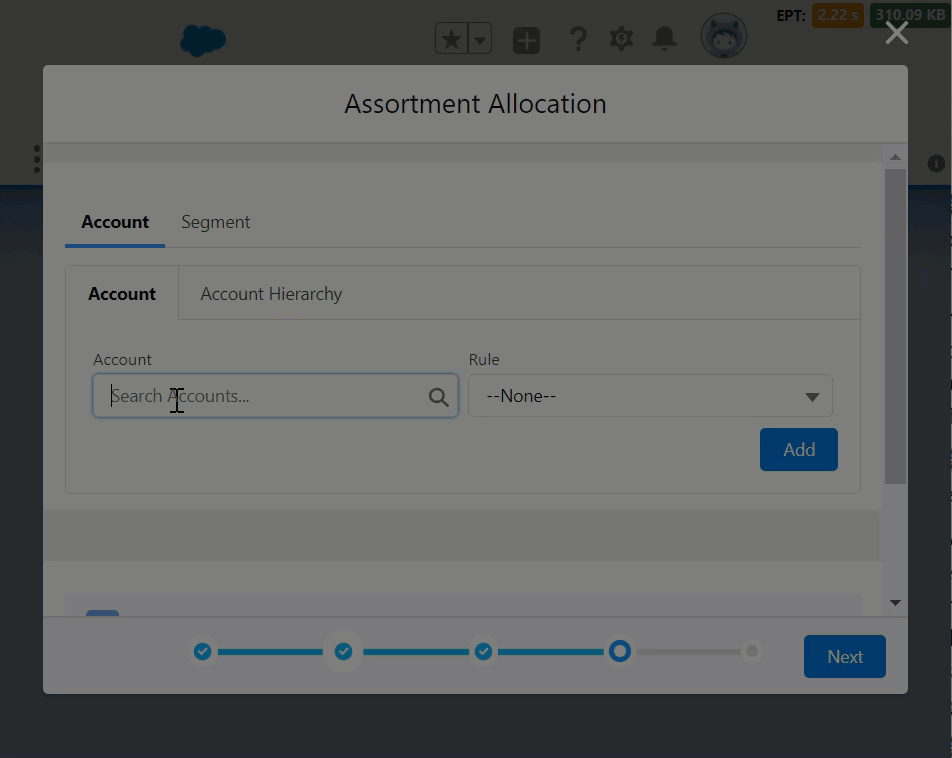


Figure 11 Allocating to accounts individually

* + **Account Hierarchy** - Allocation based on a family of account (parent-child relationship). You can turn on the Inheritance and add one or more parent accounts to include or exclude from the assortment allocation.

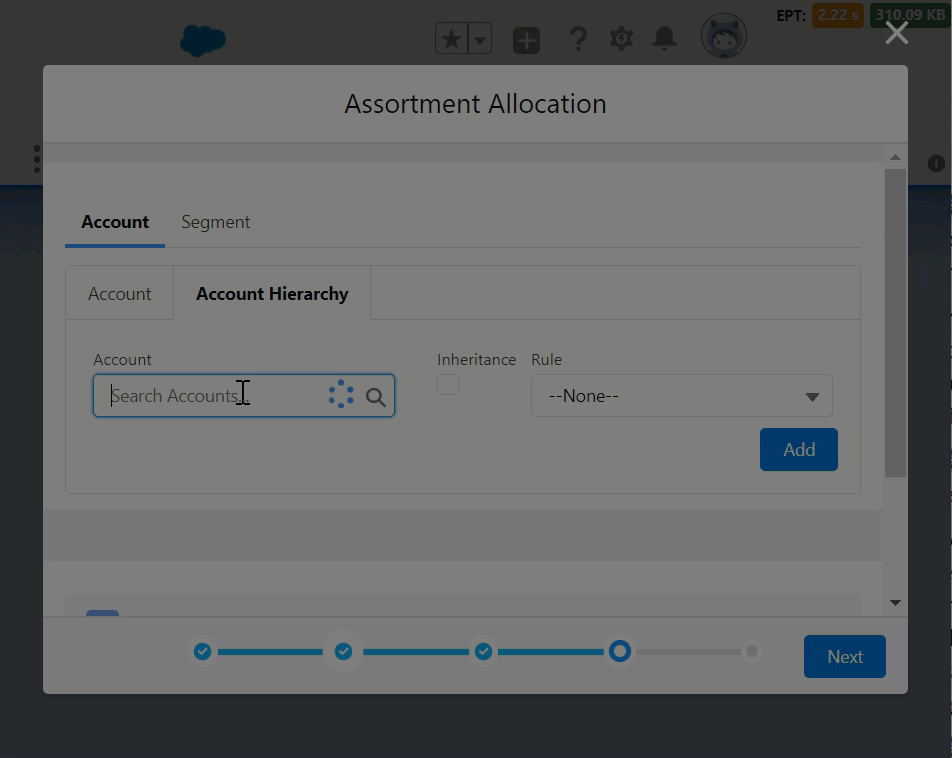


Figure 12 Allocation based on hierarchy

* + **Segment** - Allocation based on a filtered group of accounts. You can filter a group (segment) of accounts based on one or more account attributes or tags.

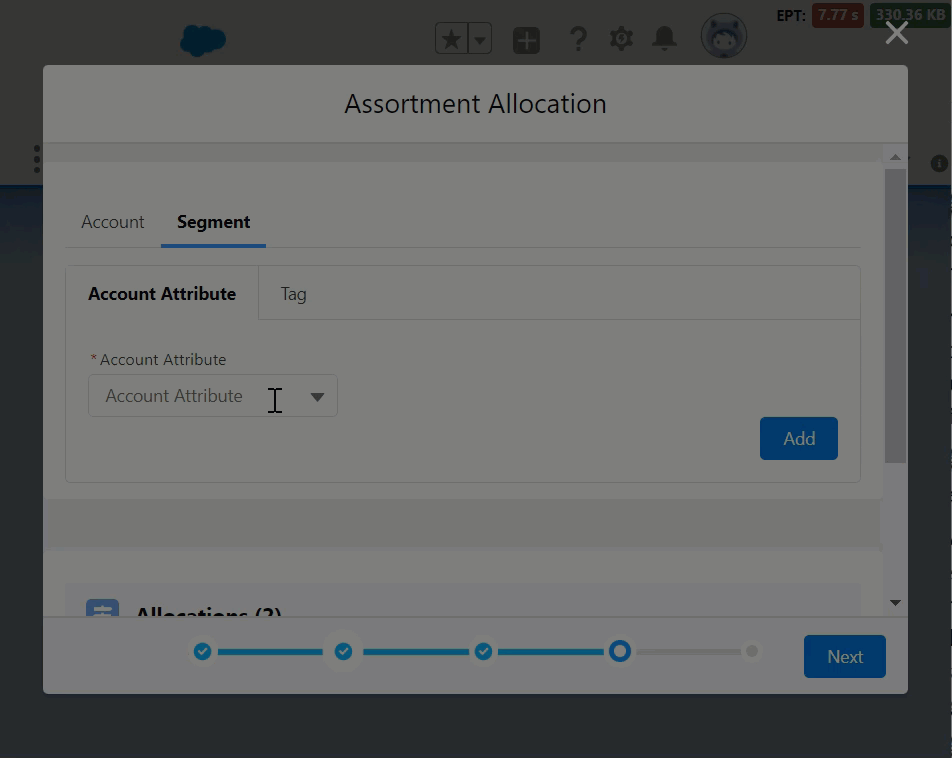


Figure 13 Allocating to a group of accounts

1. Click **Next** and choose an action based on need:
   * For new assortments, choose either:

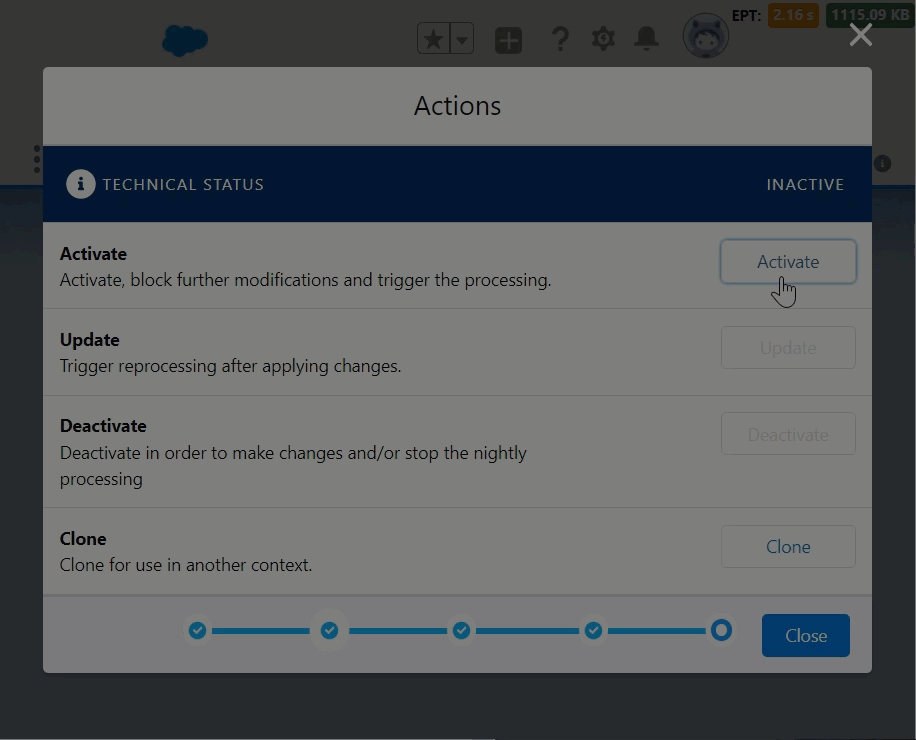


Figure 14 Activating the new Assortment

* + - **Activate** - Publishes the new Assortment.
    - **Clone** - Clones an existing Assortment.
  + While editing existing assortments, you choose to either:

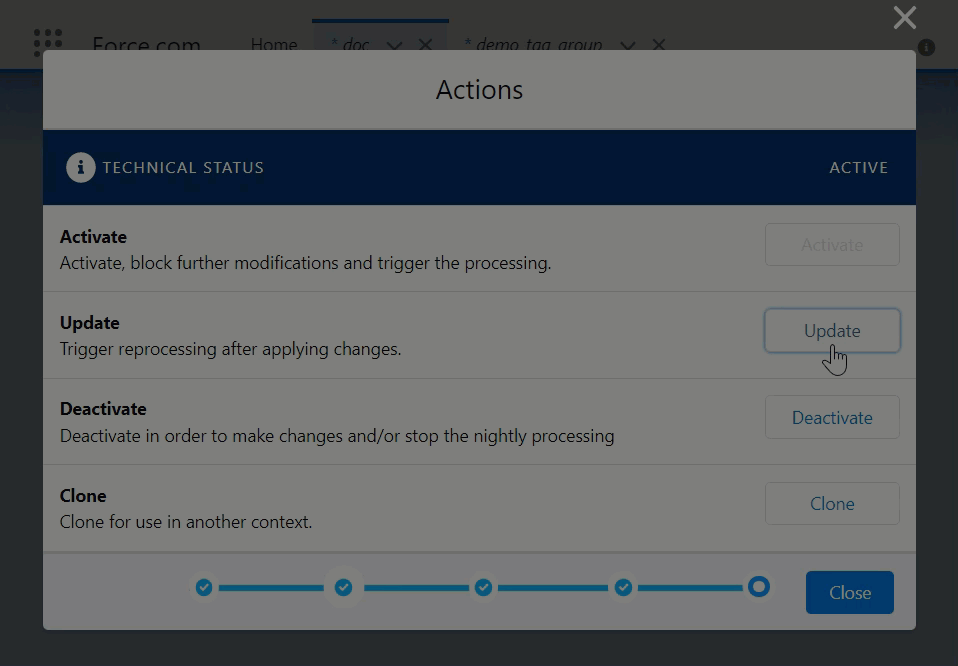


Figure 15 Updating changes in an Assortment

* + - **Deactivate** - Deactivates existing Assortment.
    - **Update** - Save changes to existing Assortment.

1. You can also just click **Close** to save and leave the new assortment in the **Draft** state.

## Managing an Assortment

You can edit, deactivate or clone an existing assortment depending on the need.

### Edit an Assortment

To edit an existing assortment object:

1. In the **Assortment** tab, click any assortment.
2. On the Assortment page, click **Edit**.
3. In the **Assortment Details** dialog that appears, make changes to the details as needed and click **Next** until you reach the last page on the dialog.
4. Click **Update** to save the changes and then click **Close**.

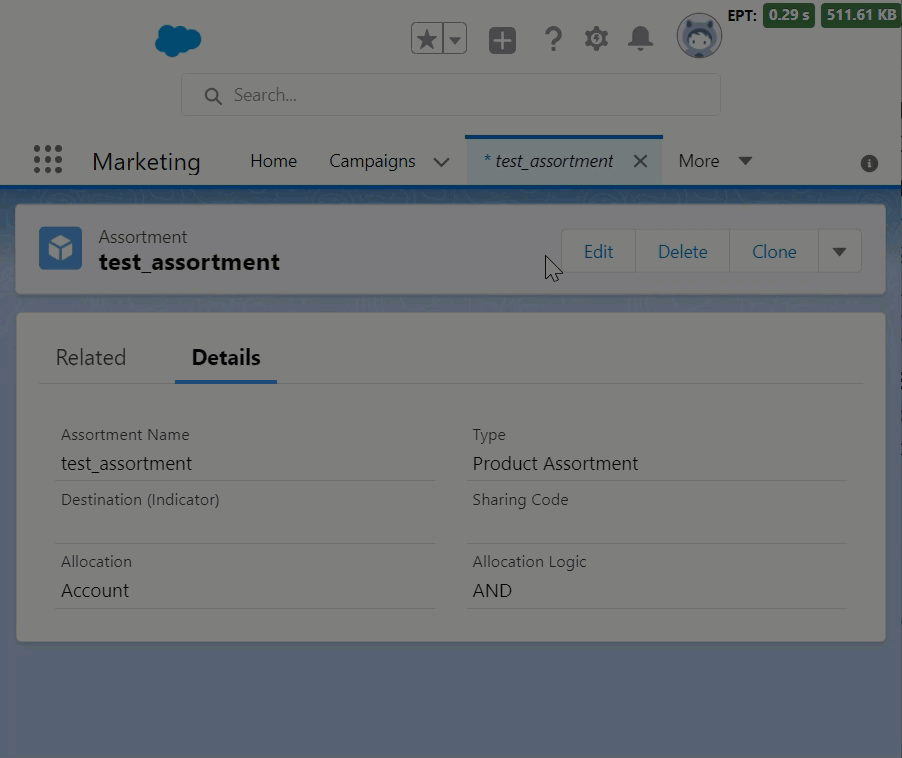
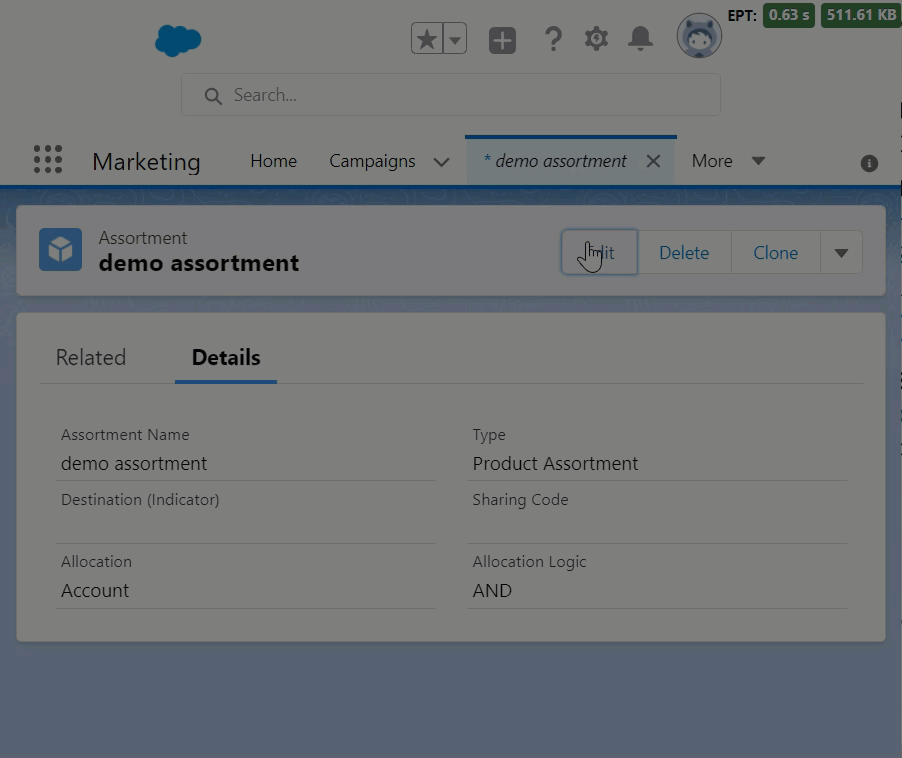


Figure 16 Editing an Assortment

### Deactivate an Assortment

To deactivate an existing assortment object:

1. In the **Assortments** tab, click any assortment.
2. On the Assortment page, click **Edit**.
3. In the **Assortment Details** dialog that appears, click **Next** until you reach the last page on the dialog.
4. Click **Deactivate** and then click **Close**.



### Clone an Assortment

To clone an existing Assortment object:

1. In the **Assortments** tab, click any assortment.
2. On the Assortment page, click **Clone**.
3. In the **Assortment Details** dialog that appears, leave the configuration as it is or make changes to the details as needed.
4. Click **Save**.

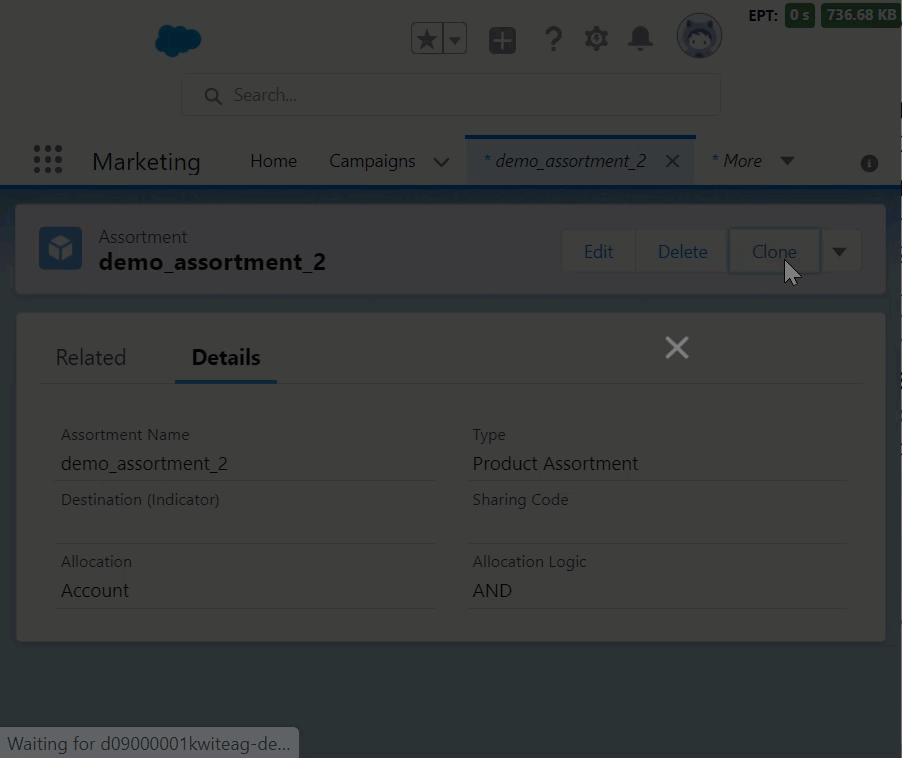


Figure 17 Cloning an Assortment