Product Management (Product Configurator)

Product Management is crucial in RakataCRM for Flooring. The product setup is critical to ensure the correct calculations can be calculated correctly. If product setup is NOT correct when products are added to a customer order the calculation may be incorrect or not calculated at all. To ensure products are calcualted and added correct please follow this guide correctly.

- Overview of Product Management
- Creating and Managing Suppliers
- Create a Flooring Type
- Create a Product Range
- Create a Product
- Review Incorrect Setup Products

Overview of Product Management

The setup of Products is one of the most important aspects of the setup of Rakata CRM for Flooring. It is critical that Products, Flooring Types and Product Ranges are configured correctly. Incorrect product setup can result in incorrect calculations or the product not calcuating at all.

Read this guide thoroughly to understand the setup to get the best out of the system.

Setup Hierachy

The system has been designed to make the onboading of products as easy as possible. There are 3 layers to setup.   These are:

Hierarcy	Level	Description

Flooring Type	Top Level	This is the top level in the tree. Flooring Types cover the calcualtions that the Products within it are based on. The calcuation types and their additional variables are:
		• Per Unit
		  ○ (Outgoing Labour Cost Per m2 (£);
		  ○ Labour Retail Price Per m2 (£)
		• Per M2 Fixed Width
		  ○ Wastage % (if applicable)
		  ○ (Outgoing Labour Cost Per m2 (£);
		  ○ Labour Retail Price Per m2 (£)
		• Per M: Perimeter Length
		  ○ (Outgoing Labour Cost Per m2 (£);
		  ○ Labour Retail Price Per m2 (£)
		• Per M2
		  ○ Wastage % (if applicable)
		  ○ (Outgoing Labour Cost Per m2 (£);
		  ○ Labour Retail Price Per m2 (£)

Hierarcy	Level	Description
Product Range	Second Level	Product Ranges are Supplier Ranges e.g. Apollo Elite The Product range records the following information: - Suppliers who provide this range - there can be more than 1. - Available Width(s) if appicable for (Carpet, Vinyl & Safety Flooring only). - Colours related to this range. Adding colours to the range reduces to need to add mutiple products with a single colour related to the Product. - Quote Script (This is the description added to the customer quote - This is useful if you want to provide more information than simply the product range or you want a description that doesn't mention the Product Range at all.
Product	Third	The actual product you are selling. The Product records the following key information: - Product Cost - Product Price - Pack Coverage (m2): (Applicable to Laminate / Tiles / Underlay / Glue only) - Pack Linear Meterage: Additional Information (Applicable to Gripper only)

Loading the Product Configurator

The Product Configurator provides a visual view of the flow described above.

1\. Open the Product Configurator

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2. The Product tree shows shows all the flooring types.

   1. View and expand the Flooring Types
   2. View the Flooring Type
   3. View the Product Range
   4. View the Product

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3. Expanding the Product Range will reveal all the Products with the range expanded.

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4. Clicking the view icon will open the Product detail popup

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5. Click Edit to update Product details or click the X to close the Product popup.

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Creating and Managing Suppliers

1. From the Main Configurator page view the Supplier tab

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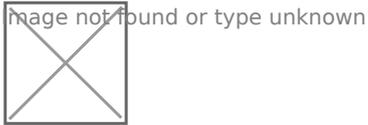
2. Clicking the Information icon will show all the Product Range that are associated to this supplier

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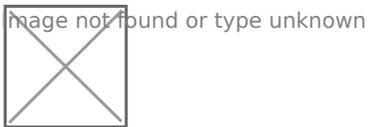
3. To add a supplier click the Add Supplier button

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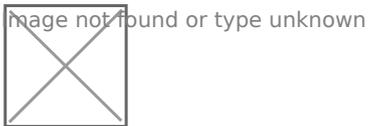
Create a Flooring Type

1. Click + ADD FLOORING TYPE button

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2. Complete the required fields

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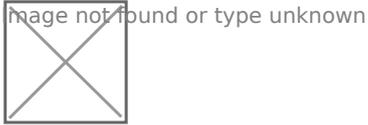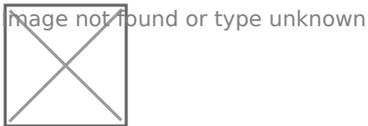
3. Select the Calculation Type

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4. Add a Wastage % if applicable

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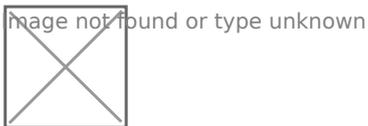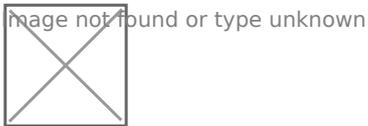
5. Complete the labour cost and price for the installation of all products within this flooring type

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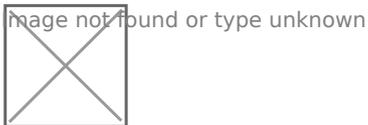
6. To view and amend the range click the view icon

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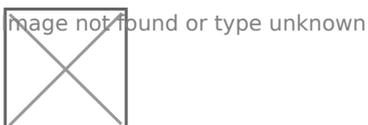
Create a Product Range

1. Click the "+" icon next to the Flooring Type where you want to create the new Product Range
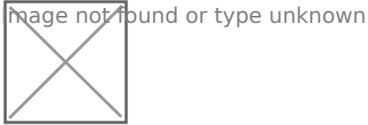
2. Type the name of Product Range, set the default supplier and add the quote script.
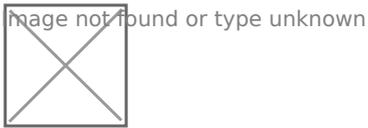
3. Select the options required for the Product Range.
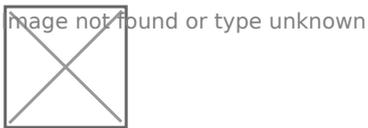
Tip: Tip! The options required for the Product Range are automatically shown based on the parent Flooring Type of the Product Range. If you are not seeing the fields you are expecting it is likely that the Parent Flooring Type type is set incorrectly.

4. Click "SUBMIT" to save the Product Range
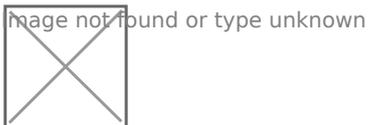
Create a Product

1. Click the "+" icon from the Product Range where you want to the create the Product

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2. Complete the required fields

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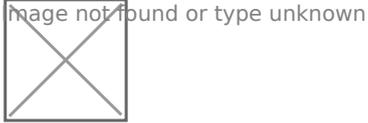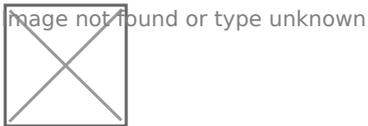
3. Add the purchase cost and sale price of the product

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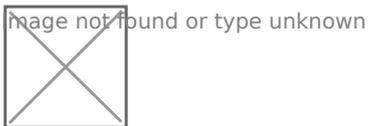
4. Complete the specific fields as required.

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5. Click "SUBMIT"

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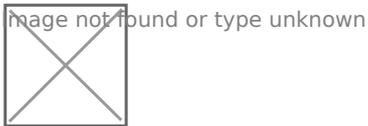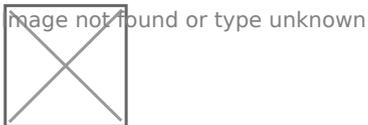
6. To view or amend the product click the view icon

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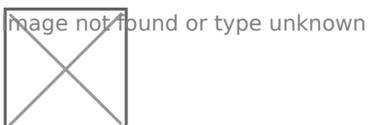
Tip! You can quickly change the status of a product from Active/Inactive by clicking the switcher.

Review Incorrect Setup Products

Incorrectly configured products will NOT show when selecting products in the survey. If you cannot see the product when attempting to select it within the survey there is likely a problem with the configuration. To assist in identifying incorrectly configured products the Configurator will highlight all incorrectly configured products.

Click on the errors tab. This will highlight all the products that are NOT configured correctly.

The configurator will also inform you of the error preventing the product from being selected.

The tree view will also show you if the product is configured incorrectly.

> Wool Rib (Alternative Flooring)	| 1 | +	👁
> Woosie (Alternative Flooring)	| 1 | +	👁
> York Wilton (Ulster Carpets)	| 1 | +	👁

∨ CARPET DUAL STICK	| 5 | +	👁
> Metallic ()	| 2 | + ⚠	👁
> Naturals (Unnatural Flooring)	| 1 | +	👁
> New England (Unnatural Flooring)	| 1 | +	👁
> Sisal Malay (Alternative Flooring)	| 1 | +	👁