

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 calculating 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 onboarding of products as easy as possible. There are 3 layers to setup. These are:

| Hierarchy | Level | Description |
|---------------|-----------|---|
| Flooring Type | Top Level | <p>This is the top level in the tree. Flooring Types cover the calculatlions that the Products within it are based on. The calculation types and their additional variables are:</p> <ul style="list-style-type: none">• Per Unit<ul style="list-style-type: none">◦ (Outgoing Labour Cost Per m2 (£);◦ Labour Retail Price Per m2 (£)• Per M2 Fixed Width<ul style="list-style-type: none">◦ Wastage % (if applicable)◦ (Outgoing Labour Cost Per m2 (£);◦ Labour Retail Price Per m2 (£)• Per M: Perimeter Length<ul style="list-style-type: none">◦ (Outgoing Labour Cost Per m2 (£);◦ Labour Retail Price Per m2 (£)• Per M2<ul style="list-style-type: none">◦ Wastage % (if applicable)◦ (Outgoing Labour Cost Per m2 (£);◦ Labour Retail Price Per m2 (£) |

| Hierarchy | Level | Description |
|---------------|--------------|--|
| Product Range | Second Level | <p>Product Ranges are Supplier Ranges e.g. Apollo Elite</p> <p>The Product range records the following information:</p> <ul style="list-style-type: none"> • Suppliers who provide this range - there can be more than 1. • Available Width(s) if applicable 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 | <p>The actual product you are selling. The Product records the following key information:</p> <ul style="list-style-type: none"> • 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



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



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



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



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



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