# Managing the Store

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# Overview

The store is an enhanced feature within service **minder** that allows a brand to purchase and restock products necessary to jobs from one place. It is different than inventory but can work in partnership with inventory to allow a brand admin to stay on top of purchasing for all orgs. Franchisees can only order through the store; they do not have access to edit parts within the store. This is intended for high-level users in the brand to use and maintain.

You will know if your brand has the store set up if you see this option in the top navigation menu.



To set up a "store", you must get assistance from the service**minder** support team. There is some backend setup needed to provide users access.

This article will review:

- Settings and Navigation
- Orders
- Items
- Dimensions
- Vendors
- Customers & Discount Tiers
- FAQs

### **Settings and Navigation**

Make sure you are viewing the franchising template organization, then navigate to Dashboard > Tools and scroll down to the Store Management section.

#### Store Management



Weight Classes are used for heavy items where the business may need to make accommodations for delivering a heavier item such as requiring a specialized driver or vehicle to haul the item to the job site. Weight class is not a requirement for setting up items/parts, so this is more specialized for certain types of business.

**Tags** are also sometimes used but not required. These are useful for tracking and reporting if you have many items or a large variety of services that require certain items.

Add Store Item Tag	
Name	
Header?	
Parent Tag	Select one <b>V</b>

#### Orders

Think of this option as the reporting aspect of the store.



Orders View all orders for

The list of orders provides details on which organization requested these and allows you to create a shipping order.

HVAC Supplies - Order History								
Page 1 of 1 (2 i	items) 애 🕢 1 🕟	()						
	Order Date	Order Number	Status	Downloaded	Processed	Subtotal	Tax	•
Ship   Cancel	7/1/2014 10:52:57 AM	3	New	No	No	\$3,418.00	\$0.00	ć
Ship   Cancel	6/30/2014 7:14:36 PM	2	New	No	No	\$1,619.00	\$0.00	ę

Add Shipment to Order #3		
Tracking Info		
Invoice Number	A URL or number to be used for tracking this shipment.	
ACSEER13	Click <u>here</u> to set the quantity of all remaining items to their maximum amount.	
BLADE24	4 remaining	
	Save	

Click on the name of the order to get images and details.

BPB Control - Name   BPB Control - Name   3 x   92,2000     Mark With With With With With With With With	Order Details -	3	Process Ship	Order Cancel Order Ad	d Order to Cart	Your Cart	Empty	View Cart
Note   Total states     Reference   5,502.00     Subscription   \$1,502.00     Subscription   \$2,00 shipped)   \$3,055.00     Subscription   \$1,40 shipped)   \$3,055.00	Bob's Pest Control - Hou 19111 Miller Wilson Rd Suite 224 Crosby, TX 77532 (713) 270-6400	aston				PORTAC ACSEER13	3 x 3 x Subtotal: Tax: Total:	\$2,370.00 \$4,587.00 \$6,957.00 \$0.00 \$6,957.00
Reference     Processed No     Image: Second	Note 🖋					You've earned free shippping.		
Processed No     Reliable air conditioning condensing unit.   \$1,529.00   \$3,058.00     Reliable air conditioning condensing unit.   \$2 (0 shipped)   \$3,058.00     Reliable dir conditioning condensing unit.   \$90.00   \$3,058.00   \$3,058.00     Reliable dir conditioning condensing unit.   \$90.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$3,058.00   \$	Reference							
Reliable air conditioning condensing unit. \$1,529.00   Reliable air conditioning condensing unit. 2 (0 shipped) \$3,056.00   24 <sup>4</sup> Fan Blade \$90.00   24 <sup>4</sup> fan blade for use with exhaust fans and circulators. 4 (0 shipped) \$360.00   24 <sup>4</sup> fan blade for use with exhaust fans and circulators. 4 (0 shipped) \$360.00   25 Subtotal \$3,418.00   36 Subtotal \$0.00	Processed No							
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24* Fon Blade     \$90.00       24* fon blade for use with exhaust fons and circulators.     4 (0 shipped)     \$360.00       10: UD12:4     5     \$360.00     \$3,418.00       Tax     \$0.00     \$0.00     \$0.00	ACSEERI3	Reliable air conditioning condensing unit.		2 (0 shipped)	\$3,058.00			
24' fon blade for use with subaut fons and circulators. 4 (0 shipped) \$360.00   BLADE24 Subtotal \$3,418.00   Tax \$0.00		24" Fan Blade	\$90.00					
Subtotal \$3,418.00 Tax \$0.00	BLADE24	24' fan blade for use with exhaust fans and circulators.		4 (0 shipped)	\$360.00			
Ταχ \$0.00				Subtotal	\$3,418.00			
				Tax	\$0.00			
Total \$3,418.00				Total	\$3,418.00			

You can also download all current or past orders for tracking and reporting purposes. Find these options at the top of the screen.



#### Items

Items are equal to parts in the serviceminder system. Click on this option to start adding parts manually.



View and edit items

<u>Items</u>

You must put a name for the part and it needs the same name as the part that franchisees see in their parts list.

Meaning, if you have created a list of parts and deployed them to all organizations, what you set up in the store needs to be that exact same part.

Even a different type of dash or capitalization of a word can make the "name" of the part in the store not exactly match the name of the part in the org. This will cause issues down the road, so be precise and detail-oriented with this step.

You have many fields that are optional to fill out but can enhance the store functionality including adding photos or documents relating to that part/item.

•	· ·	
Dimension 2	None	7
Dimension 3	None	7
Weight (oz.)*	0.00	
Weight Class	None <b>v</b>	
Picture		
D	Drop files here to add	
Documents	Deep files have to call	
	urop nies nere to add	

Name - this is a required field and you want to make sure it is simple and obvious

- **Description** you must include a short description and a long description; some companies make the short description the part order # and the long description the full list of part details; how you organize this is up to your brand and what make sense to your business
- Vendor you need to create vendors ahead of time to have them appear in the drop down list
- Vendor Part Number
- **Dimensions** You can have multiple dimensions, which are options or levels such as color, type of wood or metal, type of finish, etc.
- Unit Price this is the cost of the part itself
- Weight
- Weight Class
- Availability
- Pictures if attached to an item, pictures will show on the proposal if they are selected by the customer
- Documents if attached to an item, pictures will show on the proposal if they are selected by the customer
- Units
- Tags
- New Before
- Featured Before/After
- Discountable
- **Pricing** this is the set price that will show to the customer if they select this part; you can also set upPricing Bands as you would for a part

#### **Importing Parts/Items**

There are options at the top of the page if you want to bulk download or import items to get started or make any updates to the store.



If you have a spreadsheet with the appropriate fields, the quickest and easiest way to make updates is to provide that .csv file to the service**minder** support team. We can use the database to enter the parts list for the store. Again, please be extremely careful when making updates to the parts list because it will affect the store items.

We can fix any error by uploading the corrected parts list, so everything is reversible but it is better to avoid any potential disruptions in the day-to-day operations of the business.

#### Dimensions

Click on Dimensions to create categories for dropdown menu.



These are levels, or options of things such as a type of color, type of wood, or type of finish.

Edit Din	nension
	Name*
	Active
	Description*
	Internal?
#	Label
#	Label Chrome
#	Label Chrome Canada (Fr)
# 	Lobel Chrome Canada (Fr) Black Matte
# :: ×	Label Chrome Canada (Fr) Black Matte Canada (Fr)
# # 🏵 # 🏵	Label Chrome Canada (Fr) Black Matte Canada (Fr) Brushed Nickel

- Set Price -
- Flat Increase If you choose this dimension, the price increases by this dollar amount.
- Percentage Increase If you choose this dimension, the price increases by this percentage.

• Next Dimension - you can build a chain of dimensions that can be selected in sequence; for instance, the "chrome" option can have a secondary or sub category of "none" or "anti-scratch" coating that a customer must choose between

Next Dimension	
None	▼

#### Vendors

Assign the seller that provides you the item.

Add a Store Vendor	
Name* Active	
Price Scale	
Webhook Url Template	
Import Prefix	

#### **Customers and Discounts**

This is a list of the organizations that can purchase from the store. These would be your franchisee locations.



If you click Settings, you can apply special attributes to the org such as buying on credit or applying a discount tier.

Edit Customer Settings   Bob's Handyman – Plano			
Credit?			
	If checked, this customer can order using credit.		
Discount Tier	Select Discount Tier V		
Customer ID			
	Save		

Set up the discount tier via the option in Dashboard.



#### Linking Parts to the Store

Once you have items set up. The final step is to connect what lives in the store to what the franchisees see in their parts list. To do that, you will need to go to the **Store button** in the top menu.



Click on the name of a part.

Click the blue Link option.

#### How to Unlink an Item

To unlink an item, you also click on the name of the part and select the **Unlink** option.

33D18 72" - Unlink ...

**Using the Store** 

This is internally facing. A customer cannot select through all options on the customer-facing view of the proposal. The owner or sales associate, anyone internal to the business builds out the items on the proposal or makes changes if the customer decides they would rather have cherry finish instead of walnut.

So it is not like Proposal Options in that way.

On the proposal, Add a new item. Then click the blue pencil. If that item is attached to the store, you will see the dimensions (the options) appear for color, size, whatever was built into the item's fields.

Detail	S
Colors	Select one V
ty Sizes	Selectione 🔻

If there are sub categories attached to an option, once the first dimension is selected the second dimension field will appear.

# FAQs

#### Do I have to link the store item to a part?

Only if this is going to be owner-facing. Some brands choose not to link items in the store and use it as a detailed inventory count or just as a reference for all possible offerings.