Managing the Store

12/11/2025 1:20 pm CST

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.

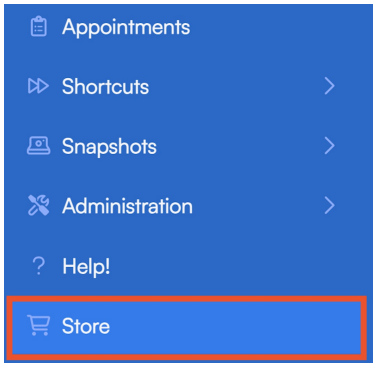
To set up a "store", you must get assistance from the service**minder** support team. There is some backend setup needed to provide users access..

This article will review:

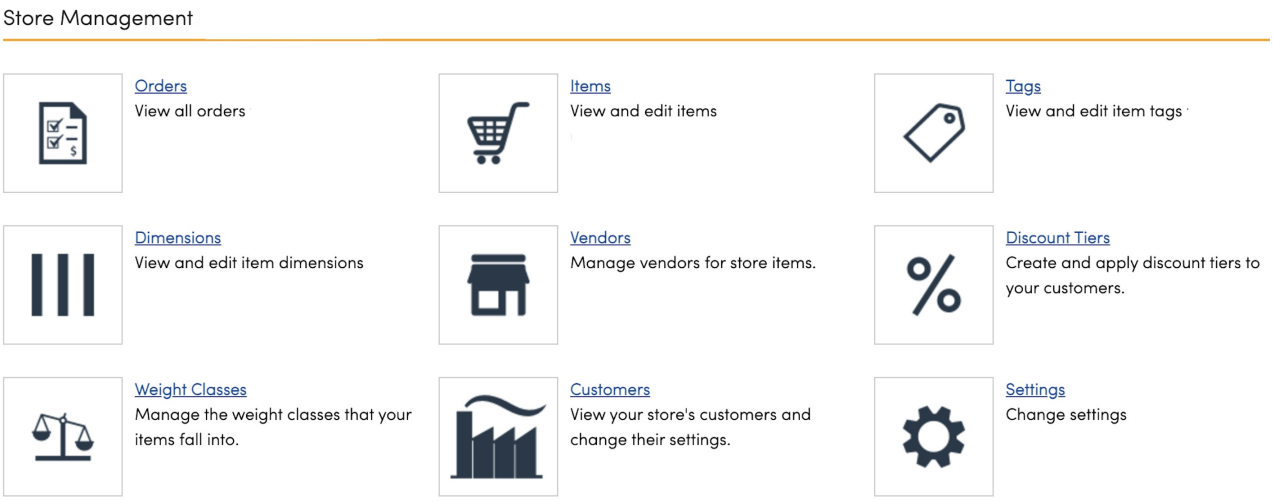
- Settings and Navigation
- Orders
- Items
- Dimensions
- Vendors
- Customers & Discounts
- Linking Parts to the Store
- Using the Store
- FAQs

Settings and Navigation

If your brand has the Store set up, you will see the Store option in the navigation menu. This is where franchisees will go to place orders.



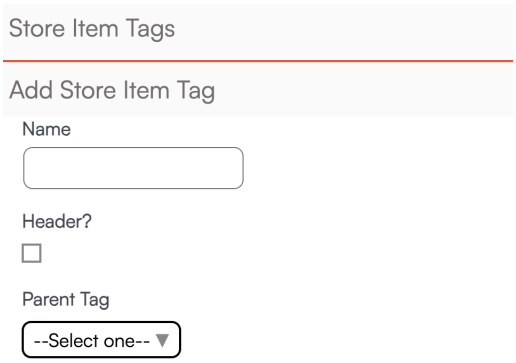
To set up the store for your brand, first **make sure you are viewing the franchising template organization**, then navigate to **Dashboard > Tools** and scroll down to the **Store Management** section.



The last option show in this section is **Settings**. This is for invoice terms.

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.

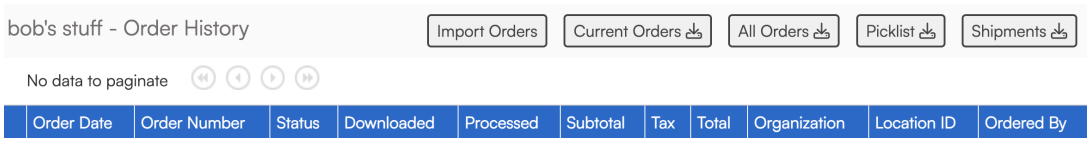
Tags are also sometimes used but not required. These are useful for tracking and reporting if you have many items or a large variety of services that require certain items.



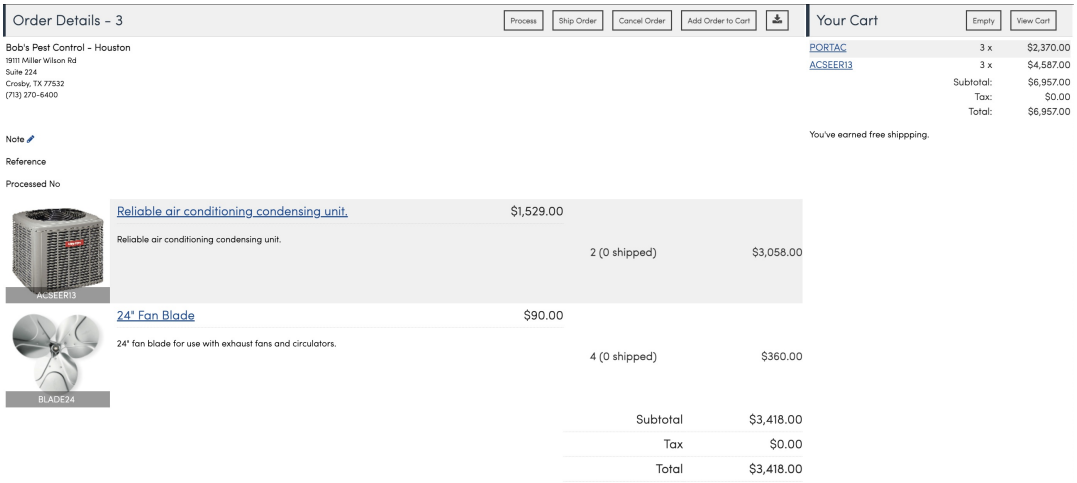
Orders

Think of **Orders** as the reporting aspect of the store. The list of orders provides details on which organization requested these and allows you to create a shipping order.

Buttons at the top of the page allow you to download CSV files of Current Orders, All Orders, Picklist, and Shipments. You can also import a file of orders into the system.



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



Items

Items are the equivalent of **Parts** in the service**minder** system. Click on this option to start adding parts manually.

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.

Below is a list of all available fields when creating a Store Item. Required parts are indicated in bold with an asterisk.

- **Name*** - this is a required field and you want to make sure it is simple and obvious
- **Description* (Short and Long)** - 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
- Active
- **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.

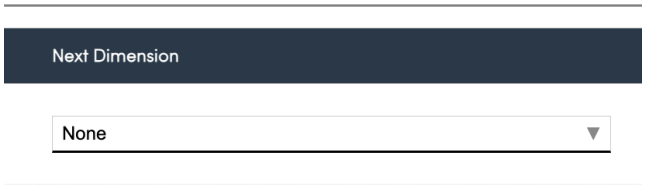
If you have a spreadsheet with the appropriate fields, the quickest and easiest way to make updates is to provide that .csv file to the service**minder** support team. We can use the database to enter the parts list for the store. Again, please be extremely careful when making updates to the parts list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

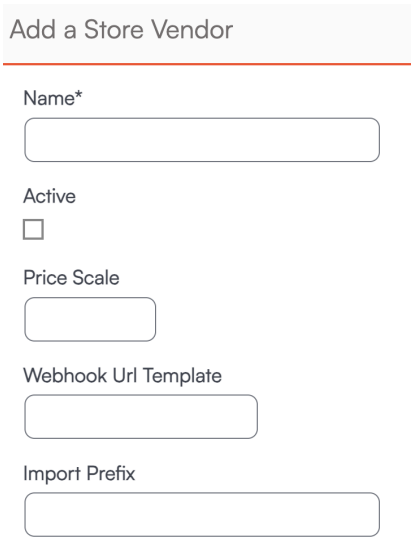
- **Set Price** - the base price of items in this category.
- **Flat Increase** - If you choose this dimension, the price increases by this dollar amount.
- **Percentage Increase** - If you choose this dimension, the price increases by this percentage.
- **Next Dimension** - you can build a chain of 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



Vendors

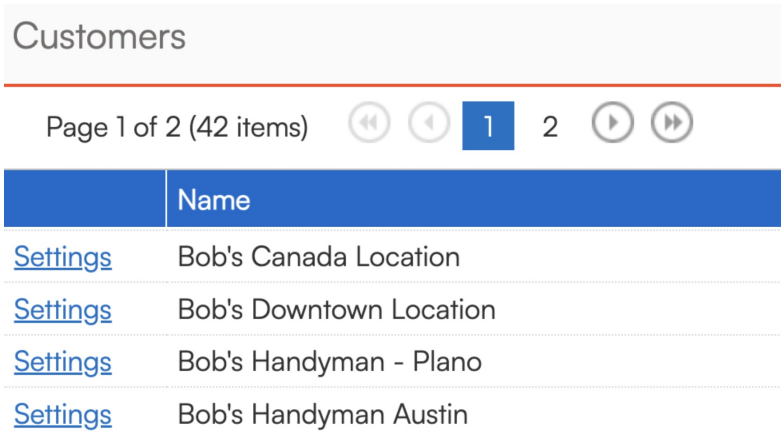
Assign the seller that provides you the item. Configure the following fields:

- Name
- Price Scale
- Webhook URL template
- Import Prefix

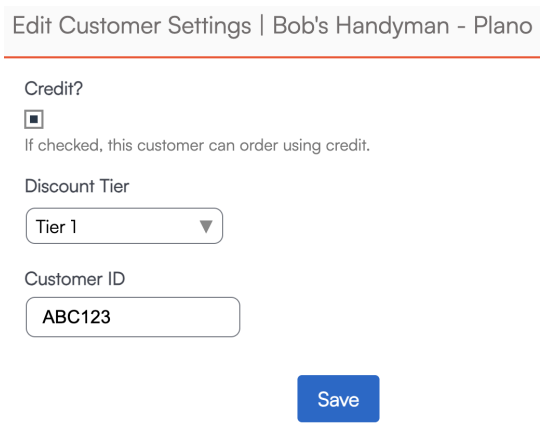


Customers & Discounts

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



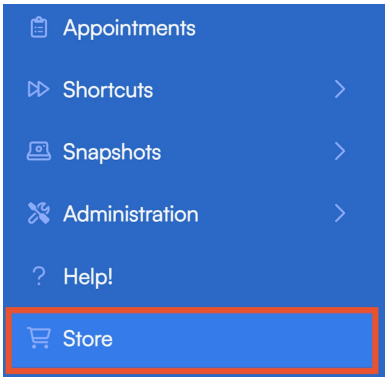
If you click **Settings**, you can apply special attributes to the org such as the Customer ID, if they can order using credit, and applying a discount tier.



Set up the discount tier via the **Discount Tiers** section in the Dashboard.

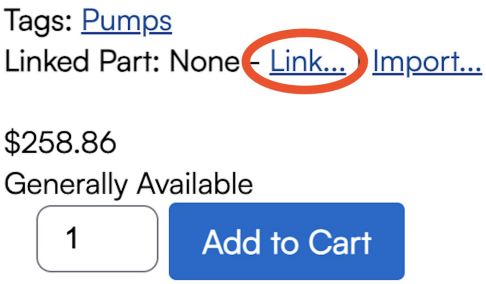
Linking Parts to the Store

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 navigation menu.

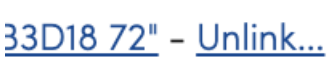


Click on the name of a part.

Click the blue **Link** option.



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



Using the Store

The Store 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.

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.