Exercise 1: Navigate Product Designer

Scenario

Meet Devi Jacob, a product designer at Infiwave. Devi's excited to start using the shared catalog to manage products for his company.

He's studied up on Vlocity Product Designer, the primary tool he'll use to control all aspects of the products in his catalog, and he's now ready to explore the interface. "Let's get started!" he proclaims out loud (to no one in particular).

Goal

- Open and navigate the Product Designer application
- Identify the different features and tools in the Product Designer interface
- Locate and view product, picklist, and attribute configuration screens

Tasks

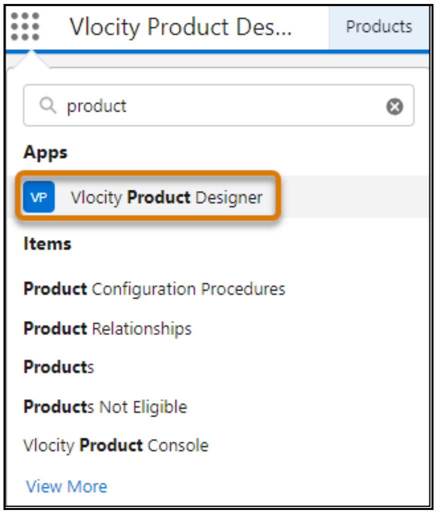
1. Launch Product Designer and explore the interface
2. Change the view of the product list and pin the list view type
3. Search for and open a product in the catalog
4. Navigate the product page
5. Open and view picklists
6. Open and view attributes

Time: 15 mins

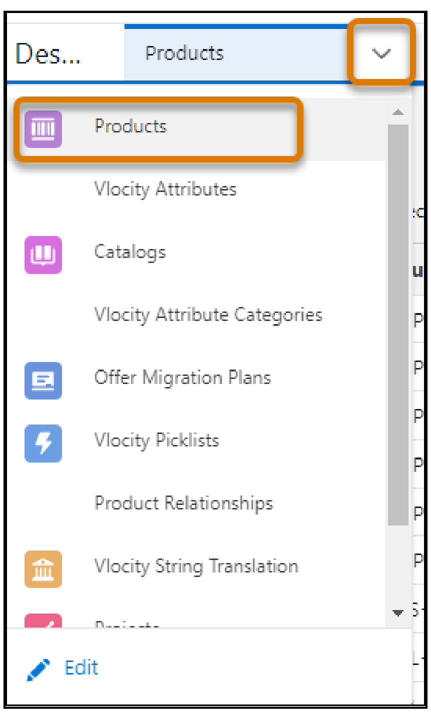
> **ALERT:**
> If you've just received your training playground, add your email address to the system administrator profile to ensure you receive all system notifications. In the upper-right, click on the **Avatar** and select **Settings**. Enter your email address in the **Email** field on the Personal Information page and click **Save.**

Task 1: Launch and navigate Product Designer

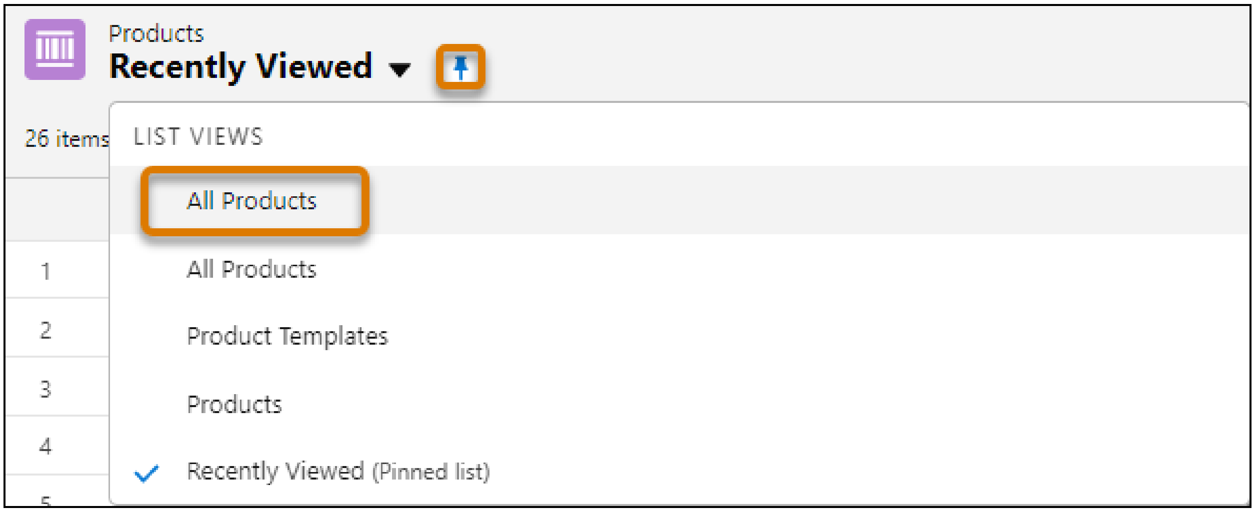
1. Using the Lightning App Launcher , search for and select **Vlocity Product Designer**.



2. Click the arrow next to the tab at the top of the interface and select **Products** from the dropdown list.

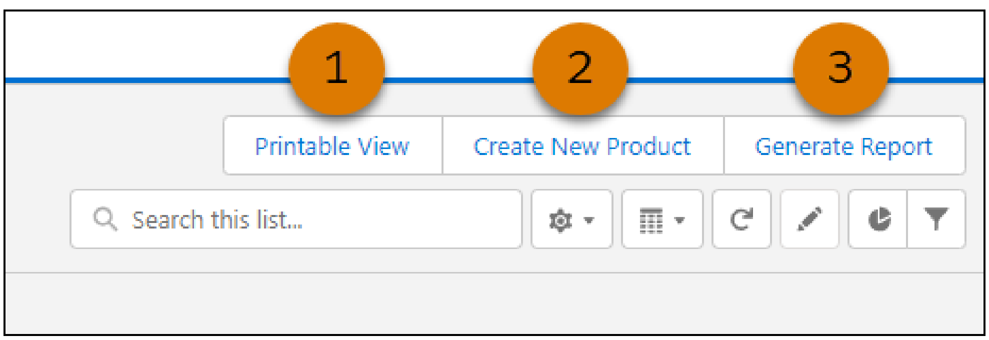


3. In the Products workspace, change the Products list view from **Recently Viewed** to **All Products** and pin the list view.

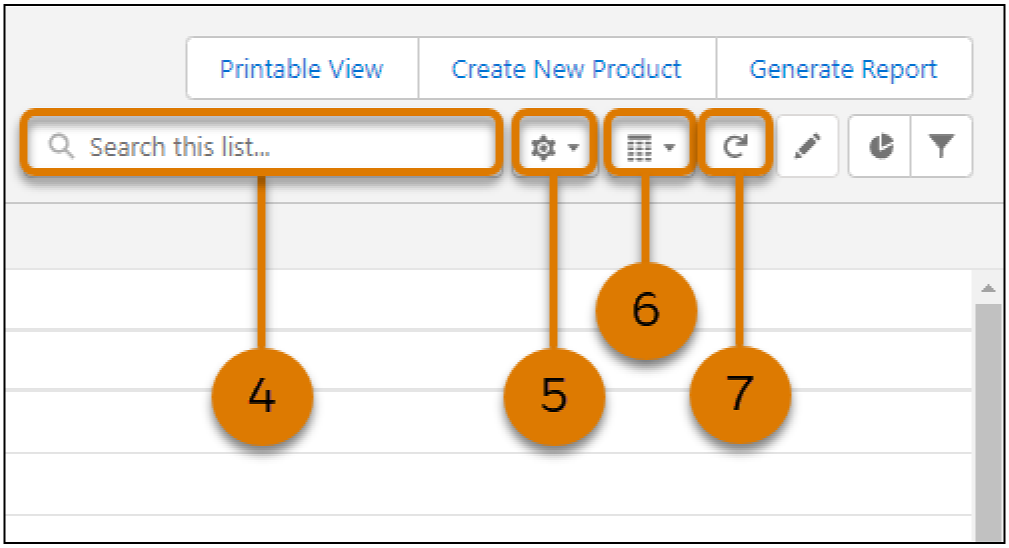


4. Review the page header, which includes options for creating, searching, and viewing products.

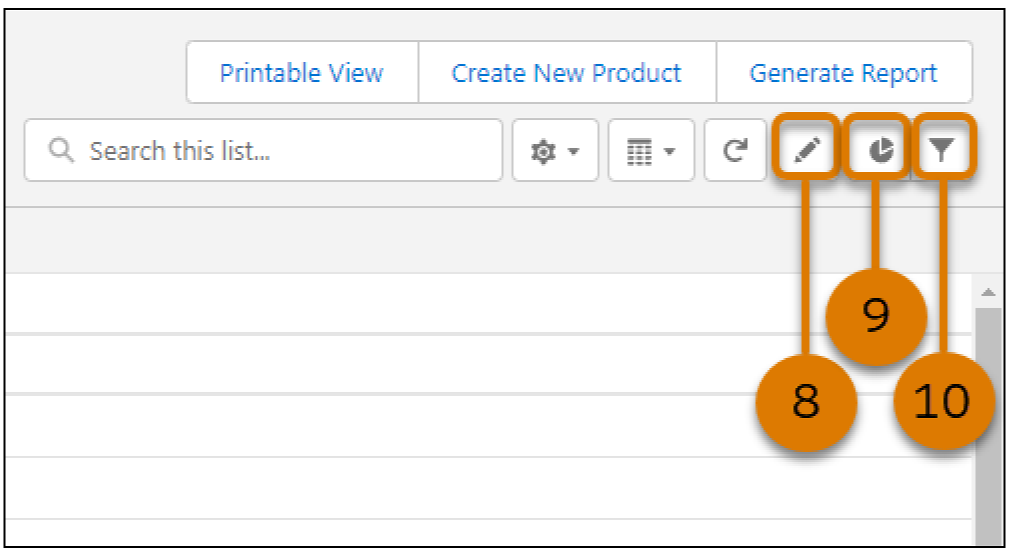
    a. Notice the **Printable View (1)**, **Create New Product (2)**, and **Generate Report (3)** buttons.



    b. Notice the search bar (4) and **List View Controls (5)**, **Display as Table (6)** and **Refresh (7)** buttons.



c. Notice the options to control the list view (8), display the list as a chart (9), or further filter list items (10).



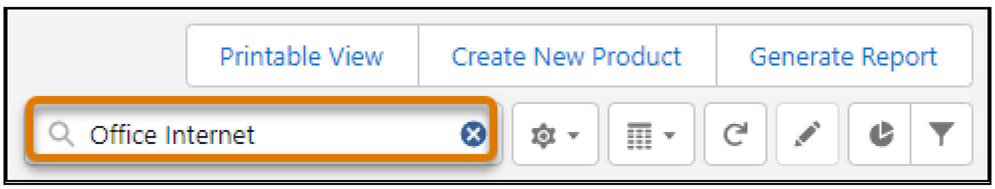
Task 2: Search for and open a product in the catalog

In this task, you'll browse the product list, search for a product, and open its product screen to view the configuration options.

1. Notice that the Products list contains product names, codes, descriptions, and associated product families.

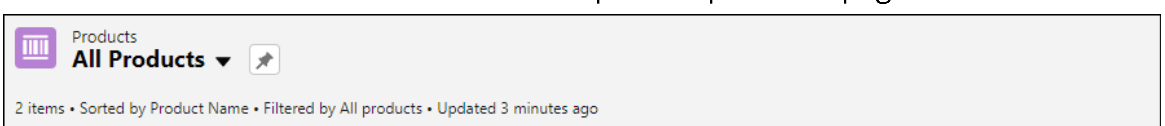
	Product Name ↑	Product Code	Product Description	Product Family
1	2 GB 30 Days	VPL_OFFERING_2_GB_30_DAYS	Add On 2 GB 30 Days	Mobile
2	4G Router CFS	B2B_TECH_ROU_01	4G Router for B2B Internet Technical Product	
3	500 Minutes & 500 Texts 30 Days	VPL_OFFERING_500_MINUTES_500_TEXTS_30_DAYS	Add On 500 Minutes & 500 Texts 30 Days	Mobile
4	5GB, 500 Minutes & 500 Texts 30 Days	VPL_OFFERING_5GB_500_MINUTES_500_TEXTS_30_DAYS	Add On 5GB, 500 Minutes & 500 Texts 30 Days	Mobile
5	Add On Billing Item	TECH_B2B_BILL_ADD_ON_01		
6	Add ons	B2B_ADD_ONS	Add ons Products for B2B Mobile Bundle	None
7	Add-on Services	VEPC_OFFERING_ADD_ON_SERVICES	Add-on services (virtual)	Networking

2. Click inside the search bar in the header and type `Office Internet` and hit Enter on the keyboard.



3. Notice that the search results are now filtered to show products that contain "office internet" in their name, description, or product family.

4. Select the **Office Internet Solution** link to open the product's page.



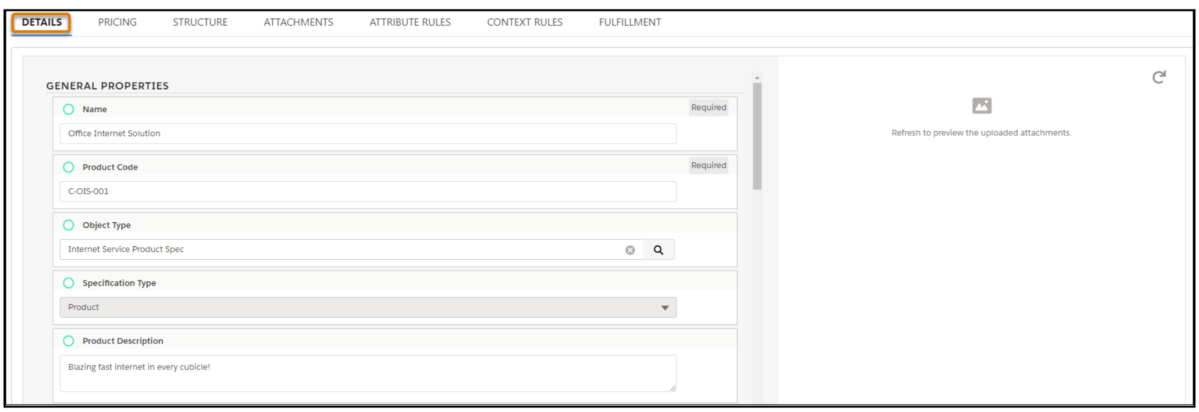
	Product Name ↑	Product Code	Product Description
1	Office Hub Modem	C-MOD-001	The Office Hub Modem brings blazing fast internet to y...
2	Office Internet Solution	C-OIS-001	Blazing fast internet in every cubicle!

Task 3: Navigate the product page

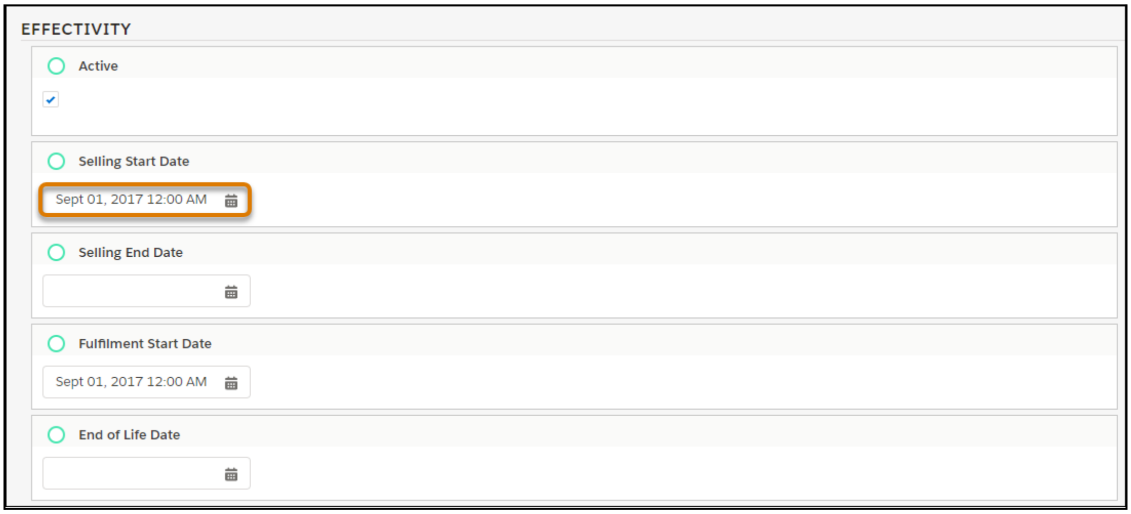
In this task, you'll locate and identify the purpose of the various tabs on the product page that contain product information and configuration options.

1. In the header of the product page, review the basic product information, including the **Product Code**, **Version Label**, **Specification Type**, **Selling Start Date**, **Status**, and **Object Type** fields.

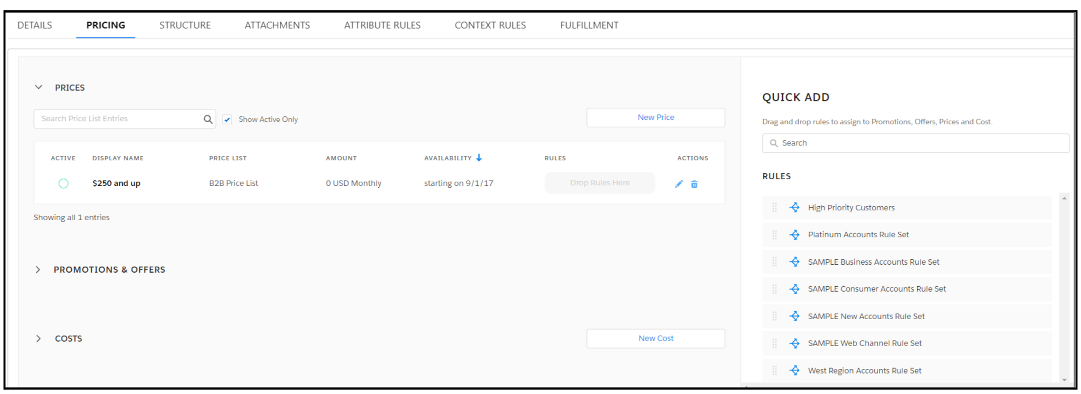
2. Notice the tabs below the header: **DETAILS**, **PRICING**, **STRUCTURE**, **ATTACHMENTS**, **ATTRIBUTE RULES**, **CONTEXT RULES**, and **FULFILLMENT**. With the DETAILS tab selected, review the GENERAL PROPERTIES of the product, including its Name, Product Code, Object and Specification Types, and Description.



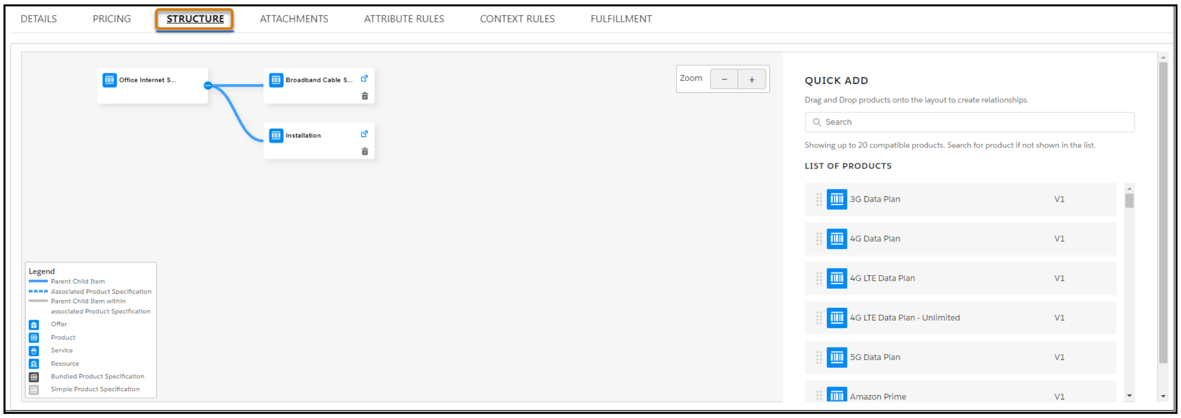
3. In the EFFECTIVITY section, notice the Selling Start and End Date fields. These are used to control the lifecycle of the product. If the Selling Period falls within the current time period, the product is sellable. Because the **Selling End Date** field is blank, it will remain sellable indefinitely.



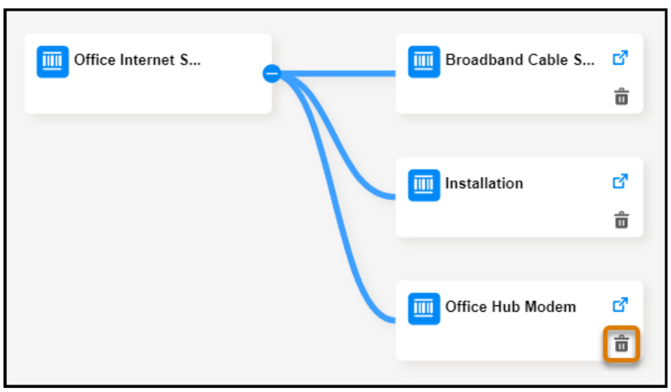
4. Select the **PRICING** tab. This is where Prices, Promotions & Offers, and Costs are assigned to the product. Also, notice the **QUICK ADD** panel that allows you to search for and apply promotions, offers, prices, and costs. Under the PRICES list, review the product's price and notice the price list to which it's associated. When using the B2B Pricelist, how much does the Office Internet Solution cost?



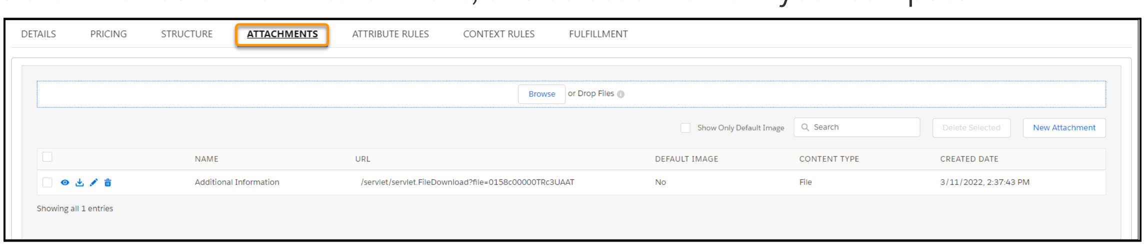
5. Click the **STRUCTURE** tab and review the diagram showing the Office Internet Solution's association with other products. The Legend shows the relationship type What products are included in this bundled offer? For each related product, notice that you can click the icon to open its product screen in a new Product Designer tab.



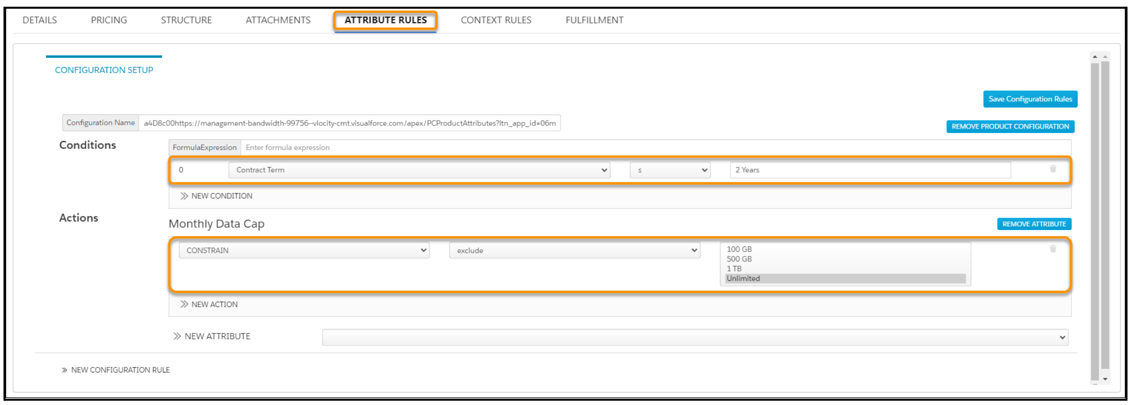
6. Scroll down the list of products in the QUICK ADD tool and drag and drop the Office Hub Modem product onto the Office Internet Solution product. Notice that it is now included as a child product in the product structure. Now, select the trash can icon  on the Office Hub Modem item. The item is now deleted from the product structure.



7. Click the **ATTACHMENTS** tab to view the files and links related to the product. Select either **Browse** or **New Attachment**, and select a file from your computer.



8. Select the **ATTRIBUTES RULES** tab. Attribute rules control how or whether a product's attributes and their values are displayed to users at run-time through the use of entity filters. You can use the Attachment Rules tab to quickly add new rules to the product by specifying conditions and resulting actions. Notice that there are no attribute rules applied to the Office Internet Solution. The example below shows the attribute rules for a different product. You can see an existing rule that excludes unlimited monthly data caps for contracts that are two years or less. At runtime in the Industries CPQ Cart, the "unlimited" value for the Monthly Data Cap will not be shown if the product's Contract Term is two years or less.



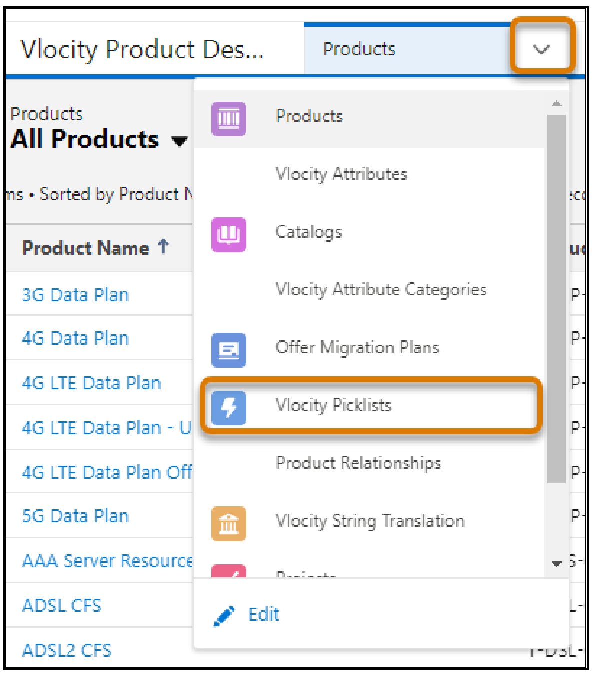
9. Click the **CONTEXT RULES** tab. Context rules, which include qualification and penalty rules, are used to change what products, promotions, and prices are shown to your customers based on certain context. On the Context rules tab, you can view existing rules, or search for and select a qualification rule set to associate with the product.

10. Select the **FULFILLMENT** tab. This is where you can set up and view fulfillment configurations, including orchestration scenarios and decomposition relationships for both source and destination products.

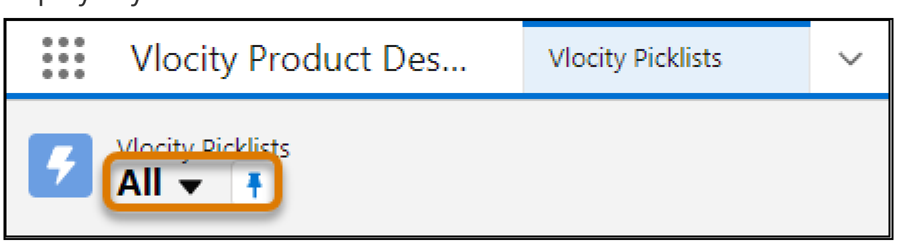
Task 4: Open and view picklists

Now that we've reviewed where products are stored and configured in Product Designer, let's turn our attention to picklists. Picklists are associated with attributes and fields. They enable the user to select from a predefined list of values at run time in the cart. In this task, you'll view the list of picklists in Vlocity Product Designer, and see how they're configured before amending the Colors picklist to ensure that Green is the first value in the picklist.

1. From the Vlocity Product Designer navigation menu, select **Vlocity Picklists**. Previously viewed tabs remain accessible at the top of the screen.

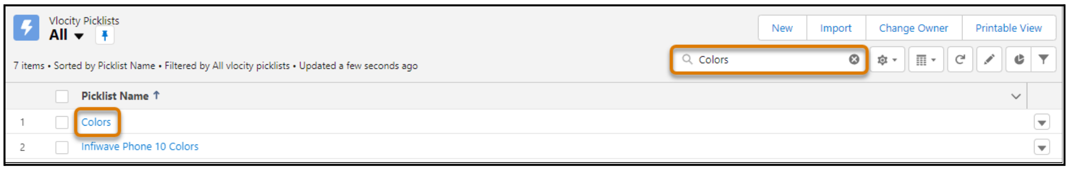


2. Change the **List View** from Recently Viewed to **All**, so you see all the picklists available in the Shared Catalog. Optionally, you can pin this list view so that it displays by default.

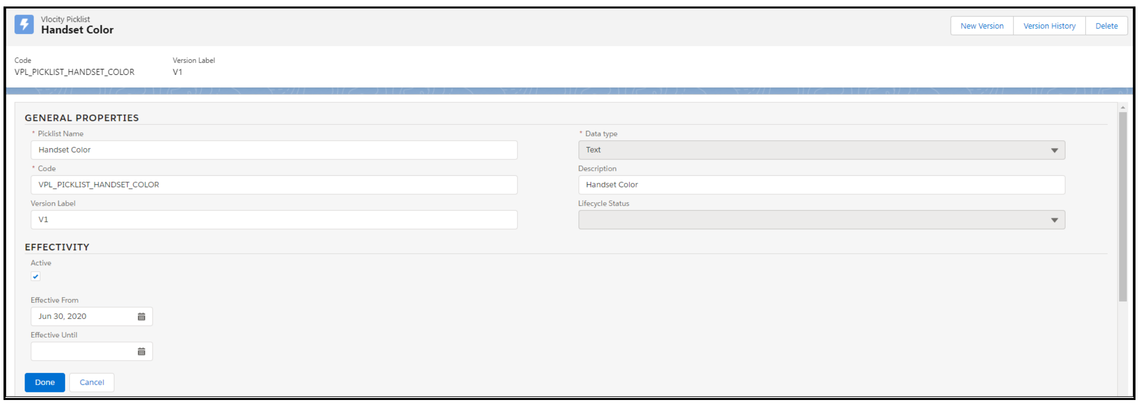


3. Notice you have access to many of the same buttons and options as on the Products screen, including the ability to create a new picklist.

4. Search for and select the **Colors** picklist to bring up its configuration screen.

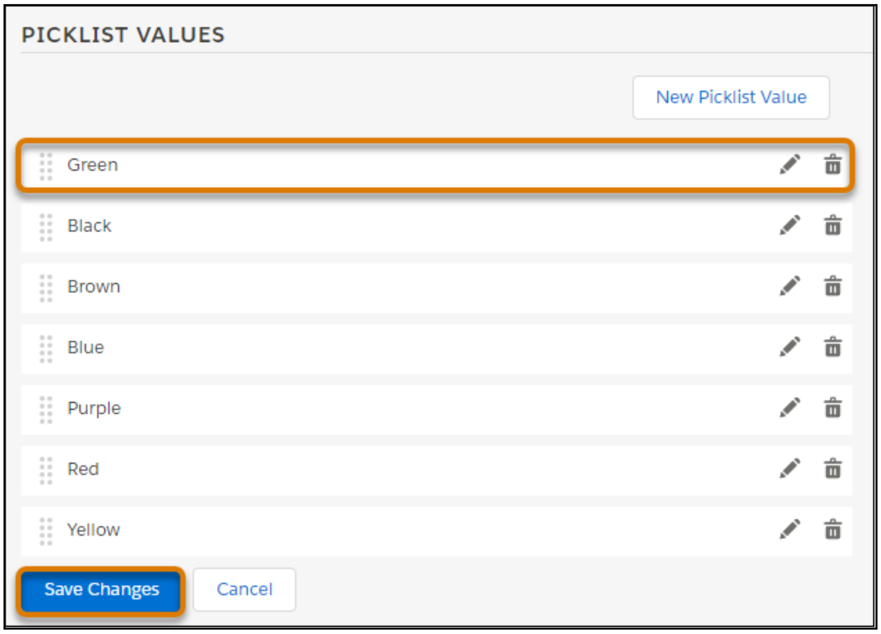


5. On the picklist configuration screen, notice the properties that were designed during the picklist's creation, including **Picklist name**, **Code**, **Version Label**, **Data type**, **Description**, **Lifecycle Status**, **Active** checkbox, and **Effectivity Dates**.



6. Scroll down to the **PICKLIST VALUES** section and review the list of selectable values associated with the picklist. Click and drag the **Green** value to the top of the stack so

that it appears as the first option in the picklist. Click **Save Changes**.

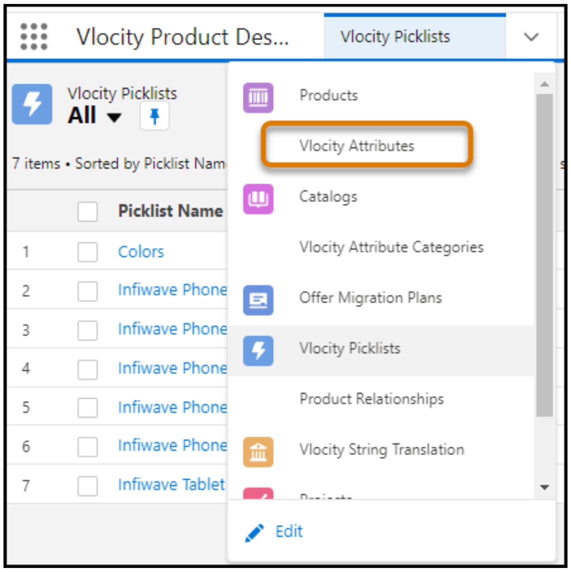


7. Review the buttons in the header section. **New Version** allows you to create a new iteration of the picklist and edit its properties. You can also view the **Version History** or delete the picklist.

Task 5: Open and view attributes

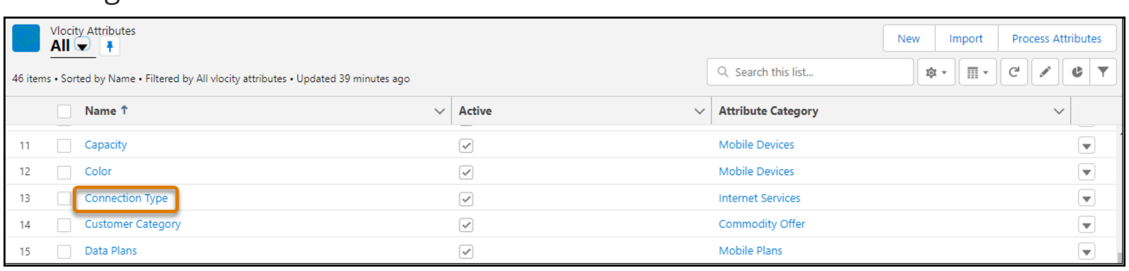
Now, let's check out where attributes are stored and configured in Product Designer.

1. From the Vlocity Product Designer navigation menu, select **Vlocity Attributes**.

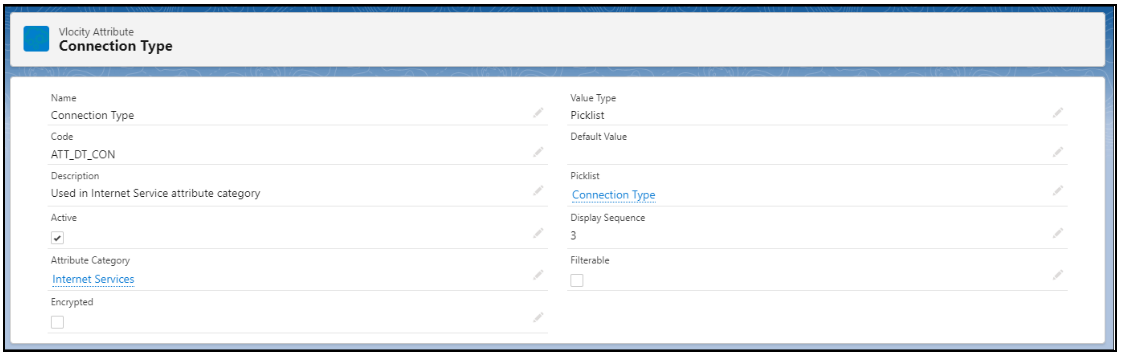


2. Change the list view to show **All** Attributes contained within the catalog, and pin the list view if preferred.

3. Scroll down and select the **Connection Type** attribute link from the list to bring up its configuration screen.



4. On the Attribute screen, you'll see the populated configuration fields, including the attribute's **Name**, **Code**, **Description**, **Active** checkbox, the **Attribute Category** it belongs to, and whether or not the attribute is encrypted.



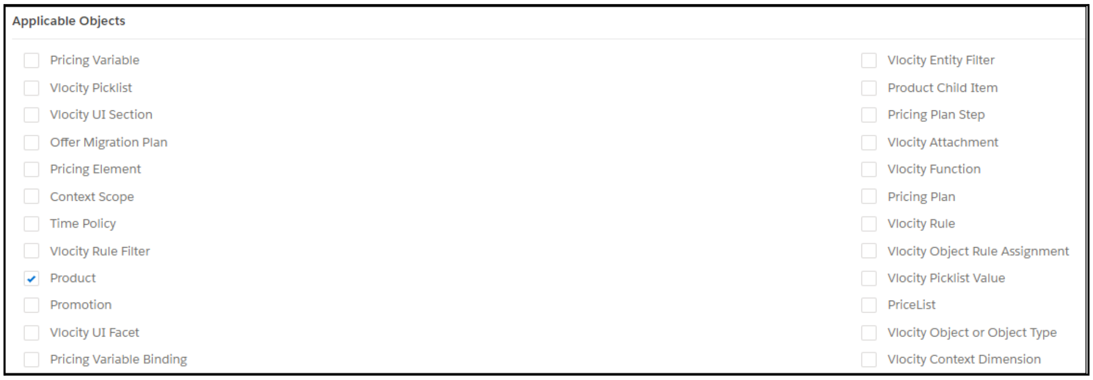
5. Review the attribute's **Value Type**, which can be set to one of the following types:
    - None
    - Currency
    - Percent
    - Text
    - Number
    - Checkbox
    - Date
    - Datetime
    - Picklist
    - Multi Picklist

    You can use the **Default Value** to set a default value for the attribute. This pertains to value types like Text or Number, but isn't used for picklists. If there's a picklist associated with the attribute, it's shown in the Value Type field.

6. Notice the **Display Sequence**, which sets the attribute's order within the attribute category and how it's displayed in the product's details in the Cart. When selected, the **Filterable** checkbox allows the attribute to be used to filter products in the cart.

7. Notice the **Applicable Objects** section, which indicates the objects to which the attribute can be assigned. This shows the objects to which the attribute can be assigned. We want to ensure that the Color attribute is available for all products, so

check that **Product** is selected as an applicable object in the list.



Yay! All done!