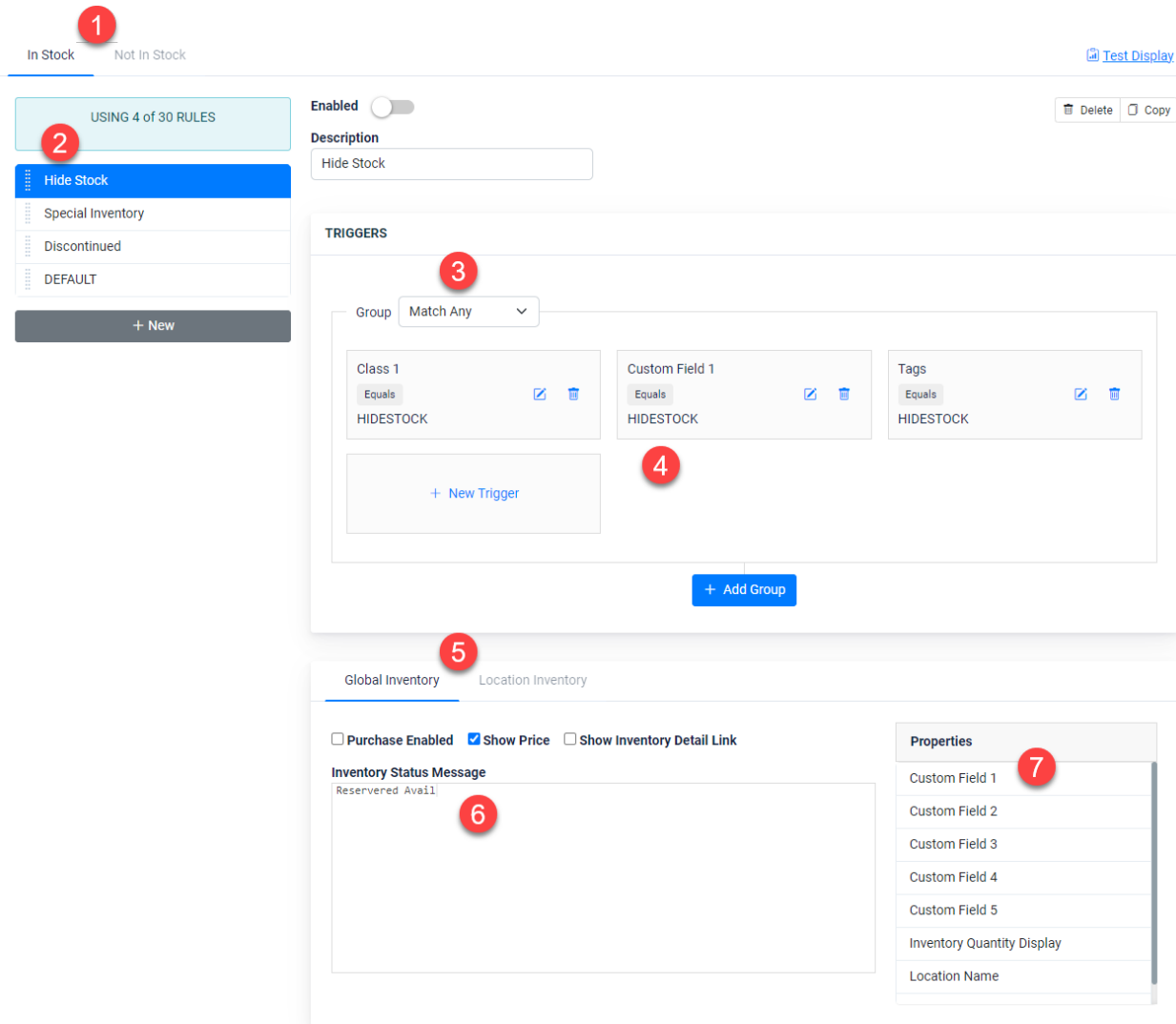


# Inventory Display Configuration

## Inventory Display Configuration Logic Flow



The screenshot shows the 'Inventory Display Configuration' interface. At the top, there are tabs for 'In Stock' (selected) and 'Not In Stock'. A 'Test Display' link is in the top right. The main area is divided into several sections:

- 1**: A status indicator 'In Stock' is selected.
- 2**: A summary box shows 'USING 4 of 30 RULES'. Below it is a list of rules: 'Hide Stock' (selected), 'Special Inventory', 'Discontinued', and 'DEFAULT'. A '+ New' button is at the bottom.
- 3**: The 'TRIGGERS' section has a 'Group' dropdown set to 'Match Any'. It contains three trigger cards: 'Class 1', 'Custom Field 1', and 'Tags'. Each card has an 'Equals' operator and the value 'HIDESTOCK'. A '+ New Trigger' button is below the cards.
- 4**: A '+ Add Group' button is at the bottom of the triggers section.
- 5**: The 'Global Inventory' tab is selected. There are checkboxes for 'Purchase Enabled', 'Show Price' (checked), and 'Show Inventory Detail Link'.
- 6**: The 'Inventory Status Message' field contains the text 'Reserved Avail'.
- 7**: The 'Properties' list on the right includes 'Custom Field 1', 'Custom Field 2', 'Custom Field 3', 'Custom Field 4', 'Custom Field 5', 'Inventory Quantity Display', and 'Location Name'.

Inventory display configuration starts with information about the item we are evaluating (e.g. classes, custom fields, tags, etc.) as well as some basic information about the user we are evaluating the information for (e.g. do they view inventory for a location or for all locations, etc.)

- 1) We first decide if the item is in stock or not in stock and then from there, we start evaluating the list of rules for the respective answer (e.g. In Stock vs. Not In Stock rules).
- 2) We start evaluating at the first rule and evaluate all the triggers associated with each rule.
- 3) For each rule, we will look at the trigger requirements. Triggers can be configured so that “ANY” matching trigger satisfies the rule or “ALL” triggers must match to satisfy the rule.
  - a. If the triggers don’t satisfy the rule, we will get the next rule in the list and see if it is satisfied, and continue down the list until we reach the DEFAULT rule (which will always be satisfied).

- 4) We now know if ONE or ALL triggers are required to satisfy the rule, so we look at each trigger to see if it is true or false.
  - a. In the example shown, ANY matching trigger satisfies the rule, so that means if the item has ANY of the following, we will use the rule
    - i. Class 1 = "HIDESTOCK"
    - ii. Custom Field 1 = "HIDESTOCK"
    - iii. Tags has a value of "HIDESTOCK"
- 5) We now look at the user information to see how this user is configured to view inventory. Either the user views inventory for a single location or for all locations (Location Inventory or Global Inventory respectively).
- 6) Now that we know which inventory view the customer uses, we retrieve the Inventory Status Message template which will generate the inventory display text for the item.
  - a. The Inventory Status Message template is a flexible field that can merge fixed text with variable text.
  - b. For example, in the example shown, the Inventory Status Message template has no variable data (variable data is notated with double brackets '{{ }}'). This Inventory Status Message template will always say "Reserved Avail" since the text is not variable.
  - c. If the Inventory Status Message template was set to {{ InventoryQuantityDisplay }} In Stock, the {{ InventoryQuantityDisplay }} portion would be replaced with the stock quantity available for the given item.
- 7) The Properties list displays the information that can be used as variable data. (note you can drag and drop items from this list into the Inventory Status Message template).
  - a. When the inventory text is generated, the product's actual value represented by the property will be merged into the text that will be shown to the user as the inventory display message. (This was discussed above in point 6c).

### **Q: Why would I want to use the inventory display configuration and why do we need rules?**

A: You should use the inventory display configuration setup for items that are commonly not 'in stock'. (though there are situations where in stock items could make use of the Inventory Display Configuration).

One scenario is the common situation where you have an item that you never intend to stock. If you only use the default inventory display, your customers will see a message that says: "0 In stock" or "Not In Stock". That's not a great user experience. If, on the other hand, you knew that this item is nearly always available in 7 days since it is a common supplier, you could create a rule to say that. As a matter of fact, while you could apply the rules to a single item, you'd quickly exhaust the maximum available number of rules. Instead, since it really isn't "this item" that arrives every 7 days but ANYTHING from this supplier that is typically available in 7 days, you would make a trigger that says: Supplier Equals "123456" or whatever the supplier number is. Then you'd enter "Typically Ships In 7 Days" for the Inventory Status Messages.

### **RECOMMENDED ACTIONS:**

#### **We strongly encourage to do the following:**

- 1) Generate a list of your top 20 suppliers
- 2) Group those suppliers into the following categories
  - a. Typically ships in 7 days or less
  - b. Typically ships in 14 days or less
  - c. Typically ships in 21 days or less
  - d. Ships direct from supplier
  - e. Typically available at our supplier
- 3) Use the chart (below) to record all the supplier IDs and information
- 4) Take the information from the chart and create 5 new rules in the “Not In Stock” rule list so that inventory for these top 20 vendors, when not in stock, will provide more detail to your users.
  - a. If you consider the difference between telling a customer an item is not in stock vs. this item typically ships in 7 days, how would this change the likelihood of them making the purchase from you vs. going elsewhere where they can get a solid expectations of ship time?

## Inventory Display Configuration

### Supplier Inventory QuickTip Workshop

#### Supplier Worksheet Chart

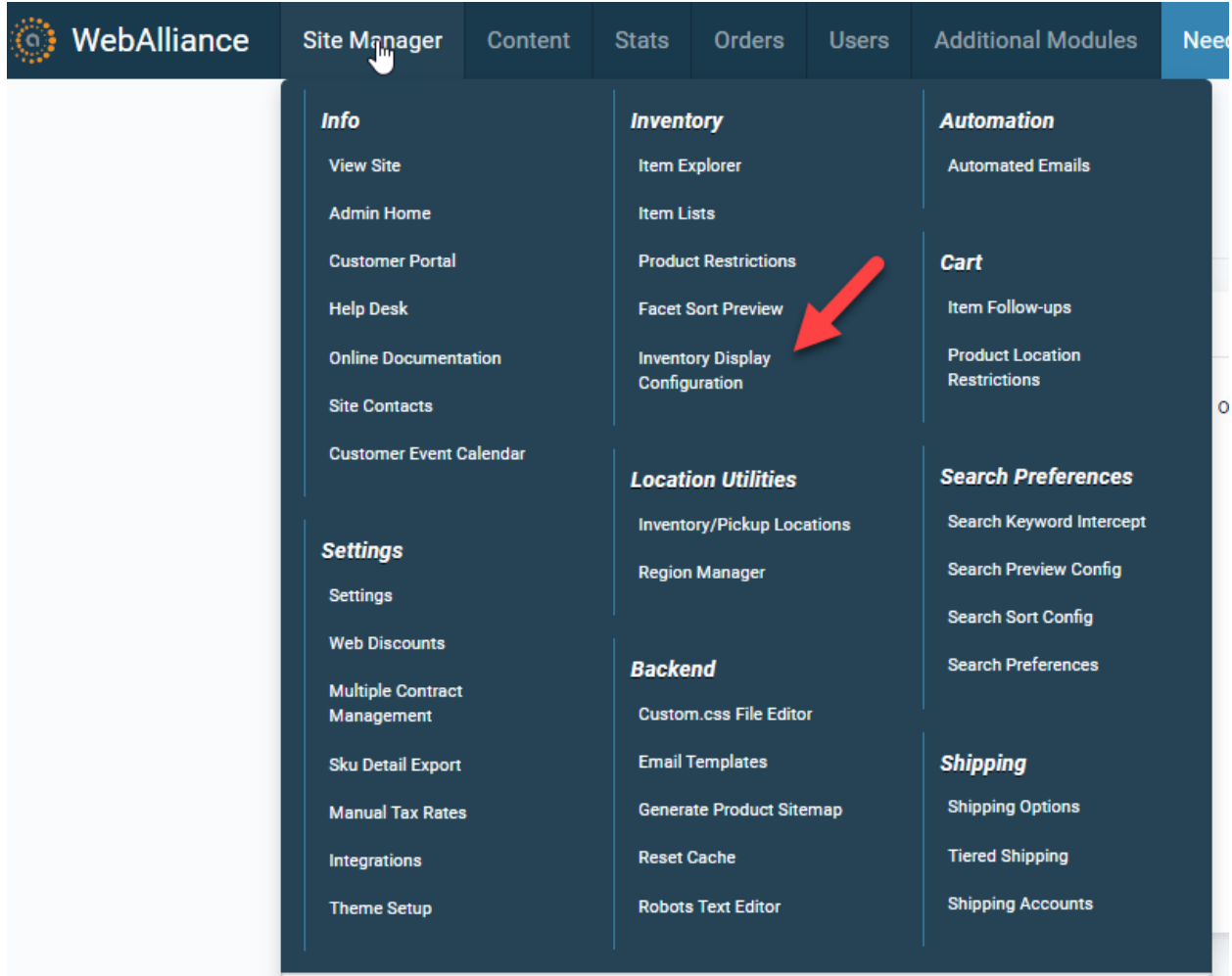
*Instructions: For each of your top 20 suppliers enter the supplier ID and Name in the proper category*

*\*Edit the Inventory Display message as desired)*

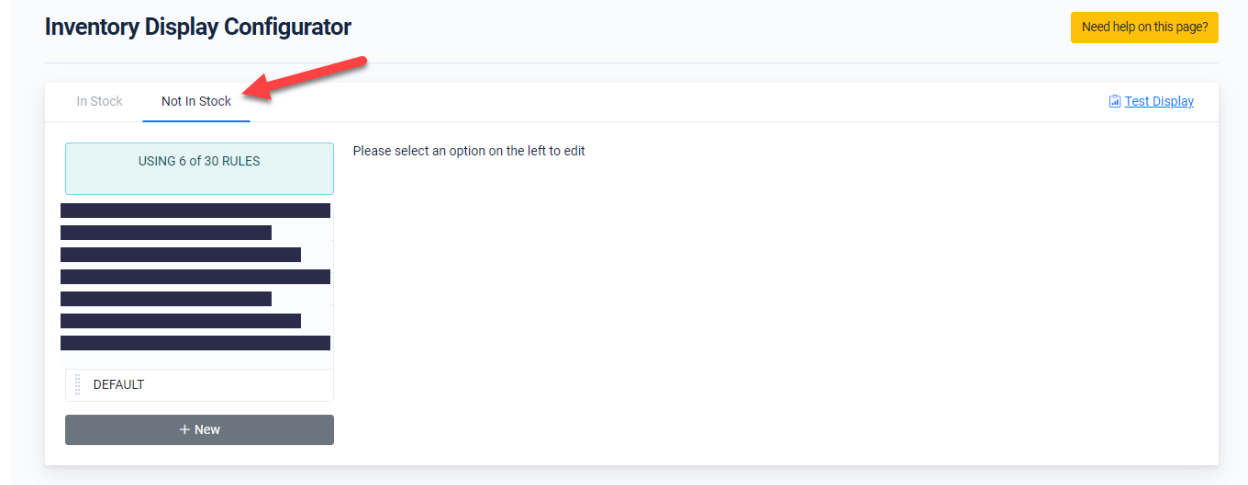
<b>Supplier Group</b>	<b>Inventory Display Message</b>	<b>Supplier ID and Name</b>
Typically ships in 7 days or less	Typically ships in 7 days	
Typically ships in 14 days or less	Typically ships in 14 days	
Typically ships in 21 days or less	Typically ships in 21 days	
Ships direct from supplier	Typically ships direct immediately	
Typically available at our supplier	Typically available for shipment from our supplier	

**Step 1: Complete the Supplier Worksheet Chart for your top 20 suppliers**

**Step 2: Visit your website administration portal (www.yoursite.com/admin2). Click on the Inventory Display Configuration (Site Manager -> Inventory -> Inventory Display Configuration)**



## Step 3: Click the “Not In Stock” rule tab

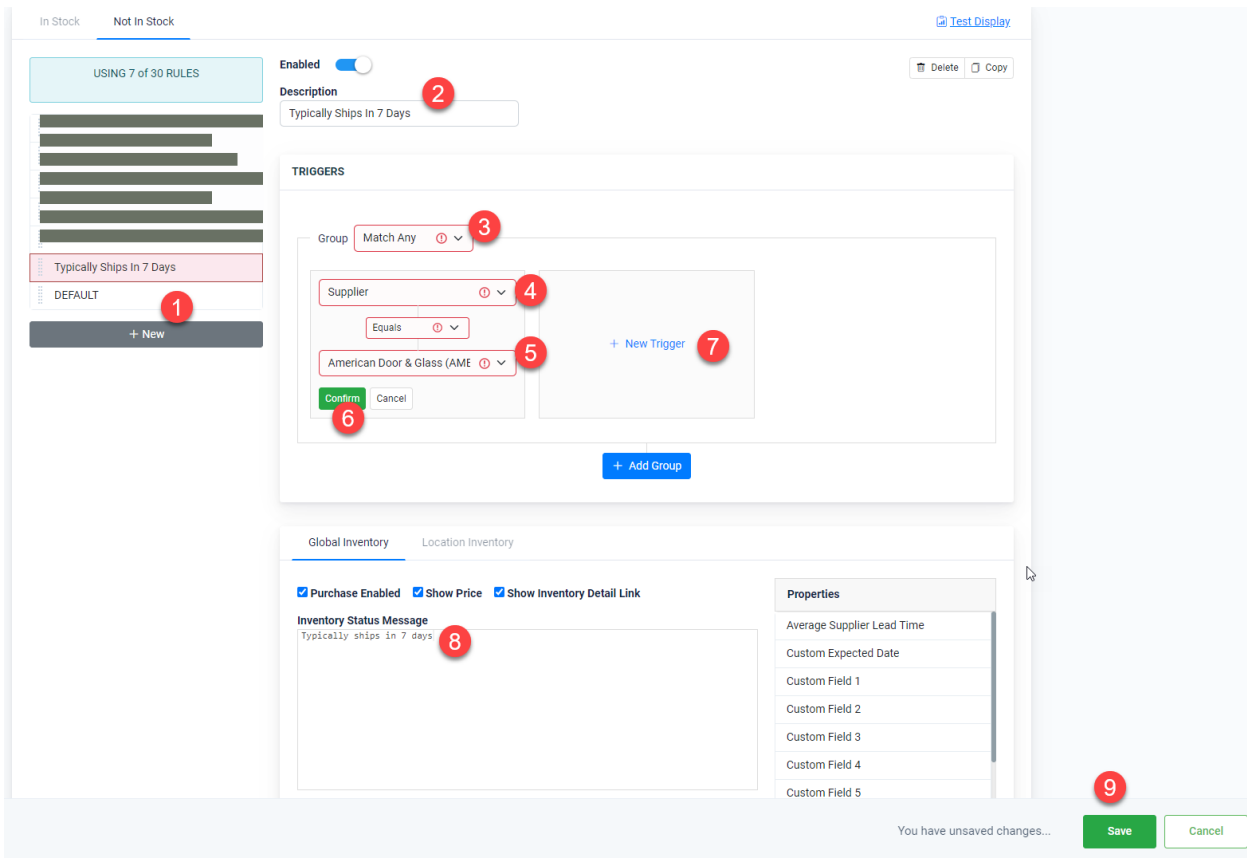


## Step 4: Configure the rule that will show when an item is out of stock for one of our ‘7 day’ vendors

- 1) Click the new button
- 2) Provide a name for this rule (e.g. Typically ships in 7 days)
- 3) Select “Match Any” (this may already be selected)
- 4) Select “Supplier”
- 5) Select the first supplier from your 7-day supplier list
- 6) Click Confirm
- 7) Add a new trigger for each supplier you placed in the 7-day supplier list in the Supplier Worksheet Chart. Repeat steps 3-6 for each supplier.
- 8) This is the text users will see when an item for one of the listed suppliers is not in stock. Type “Typically ships in 7 days” in the Inventory Status Message field (note you could alternatively type any description you’d prefer users to see for an out of stock item for one of the selected suppliers).
- 9) Save The rule

**Repeat steps 1-9 for each of the supplier categories you created on the Supplier Worksheet Chart (change the name and Inventory Display message appropriately for each group.**

# Inventory Display Configuration



The screenshot shows the 'Inventory Display Configuration' interface. At the top, there are tabs for 'In Stock' and 'Not In Stock', and a 'Test Display' button. The main configuration area is titled 'USING 7 of 30 RULES'. On the left, there is a list of rules, with 'Typically Ships in 7 Days' selected and highlighted in pink. Below this list is a 'DEFAULT' rule and a '+ New' button. The main configuration area is divided into several sections: 1. 'Enabled' toggle (checked) and 'Description' field containing 'Typically Ships in 7 Days'. 2. 'TRIGGERS' section: A 'Group' dropdown set to 'Match Any'. A trigger configuration box is shown with 'Supplier' selected, 'Equals' operator, and 'American Door & Glass (AME)' value. A '+ New Trigger' button is also visible. 3. 'Global Inventory' and 'Location Inventory' tabs. Under 'Global Inventory', there are checkboxes for 'Purchase Enabled', 'Show Price', and 'Show Inventory Detail Link'. Below these is an 'Inventory Status Message' field containing 'Typically ships in 7 days'. 4. 'Properties' section on the right, listing 'Average Supplier Lead Time', 'Custom Expected Date', and five 'Custom Field' entries. At the bottom right, there is a 'Save' button and a 'Cancel' button. A status bar at the bottom indicates 'You have unsaved changes...'. Red numbered callouts (1-9) point to various elements: 1. '+ New' button; 2. 'Description' field; 3. 'Match Any' dropdown; 4. 'Supplier' dropdown; 5. 'American Door & Glass (AME)' dropdown; 6. 'Confirm' button; 7. '+ New Trigger' button; 8. 'Inventory Status Message' field; 9. 'Save' button.

## Result:

When a user sees an item from one of the suppliers that have an inventory display rule, instead of seeing a bland out of stock message, they will now receive valuable information about the shipping time.