Set Up and Maintain Retail Execution

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SET UP AND MAINTAIN RETAIL EXECUTION

Retail Execution helps you plan store visits for your field reps and analyze your business's health across stores. While on a visit, field reps can track inventory, take orders, and capture visit details using the Retail Execution mobile app. You can also use Salesforce Surveys to get insights about your business from channel partners and use Einstein Object Detection to automate products identification and placement.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Enable Features for Your Org

To use Retail Execution, you must enable it in your org. Also, configure your org to use action plan templates to assign visit and enable your field reps to use maps and notes.

Concepts of Retail Execution

To get familiar with Retail Execution, review the terms.

Accounts and Contacts in Retail Execution

Use accounts to store information about customers or individuals you do business with. Use contacts to store information about the people you do business with. Contacts are associated to accounts, and each retail store in an account can have a different primary contact.

Manage Your Stores Efficiently

Simplify the way you track stores, in-store locations, and the products sold in these stores by grouping. Managing large numbers of individual stores, in-store locations, and products can be time consuming and confusing. It's hard to track which products are sold in which stores and where products are placed in each store. Grouping creates smaller numbers of store groups, in-store location categories, and assortments, making it easy to manage.

Products, Product Categories, and Assortments

Create product categories by grouping products based on their physical attributes. You can also group products based on their selling capabilities to create assortments. One assortment can have products from different categories.

Promotions

Promotions play a significant role in increasing product sales. Promotions can be a part of a larger campaign to spread awareness about a new product or can be a part of a targeted objective.

Planograms

Product placement plays a critical role in attracting consumer attention. A planogram check helps track how your products appear to consumers on a shelf and your products' share-of-shelf percentage at specific in-store locations.

Action Plan Items and Assessment Tasks

When field reps visit a particular retail store, they must have an action plan. Action plan is a list of action plan items. Each item can be of various assessment task types.

Action Plan Template

Action plan template is a reusable framework that you can use to schedule visits where the set of activities to be performed in each visit remains constant.

Visit

A visit is an act where a field rep goes to a retail store and performs certain tasks.

Einstein Object Detection

Einstein Object Detection detects, identifies, and locates objects in images. For instance, a field rep clicks the photo of a shelf in a retail store and can use it for object detection.

Enable Features for Your Org

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

To use Retail Execution, you must enable it in your org. Also, configure your org to use action plan templates to assign visit and enable your field reps to use maps and notes.

Enable Retail Execution

Enable Retail Execution in your org to schedule and assign visits to your field force.

Enable Maps and Addresses

If GPS is enabled on a field rep's mobile device, they can view map images and store addresses. To generate a map image, always include the required address information such as street and city, and either state, postal code, or country. Also, provide latitude and longitude details for the location.

Enable Notes

A field rep can take notes for an overall visit or for specific work tasks.

Enhance Your Experience With Extra Features

To enhance your experience with Retail Execution, use our Einstein Object Detection and Surveys.

Assign Permission Set for Retail Execution and Action Plan to Users

Assign the Retail Execution permission set to your users to provide access to visits, tasks, and more.

Create a User Profile and Provide Access to Objects

Provide your users access to the required objects by assigning a user profile. To manage access, you can set and change the standard object permissions.

Enable Retail Execution

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Enable Retail Execution in your org to schedule and assign visits to your field force.

1. From Setup, enter `Retail Execution` in the Quick Find box.
2. Select **Retail Execution Setting** under Feature Settings.
3. Enable the toggle for Retail Execution.

Enable Maps and Addresses

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

If GPS is enabled on a field rep's mobile device, they can view map images and store addresses. To generate a map image, always include the required address information such as street and city, and either state, postal code, or country. Also, provide latitude and longitude details for the location.

A map image on an address is static, but a field rep can click a map image to open the Google Map app.

Note: Field reps can use maps only if their devices are online.

1. From Setup, enter `Maps` in the Quick Find box, select **Maps and Location Settings**, then click **Edit**.
2. Check **Enable Maps and Location Services**.
3. Click **Save**.

Enable Notes

A field rep can take notes for an overall visit or for specific work tasks.

A map image on an address is static, but a field rep can click a map image to open the Google Map app.

Note: Field reps can use maps only if their devices are online.

1. From Setup, enter `Notes` in the Quick Find box.
2. Check **Notes Settings**.
3. Click **Save**.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Enhance Your Experience With Extra Features

To enhance your experience with Retail Execution, use our Einstein Object Detection and Surveys.

- Enable Einstein Object Detection to automatically identify products and their shelf placement.
- Enable Surveys to create survey invitations and collect feedback.

Enable Einstein Object Detection
Enable Einstein Object Detection to build a model that detects, identifies, and locates objects in images.

Enable Surveys
Enable Surveys to create surveys and send them to field reps. Field reps can use survey invitations to conduct surveys and capture store staff and consumer responses.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Enable Einstein Object Detection

Enable Einstein Object Detection to build a model that detects, identifies, and locates objects in images.

1. In Setup, enter `Einstein Object Detection` in the Quick Find box, and select **Einstein Object Detection**.
2. Enable Einstein Object Detection.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To enable Einstein Object Detection:
- Customize Application

Enable Surveys

Enable Surveys to create surveys and send them to field reps. Field reps can use survey invitations to conduct surveys and capture store staff and consumer responses.

A map image on an address is static, but a field rep can click a map image to open the Google Map app.

Note: Field reps can use maps only if their devices are online.

1. From Setup, enter `Survey` in the Quick Find box.
2. Click **Click Survey | Survey Settings.**.
3. Enable Surveys.
4. To create surveys that are accessible to people who don't have Salesforce accounts in your company, select a community.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

SEE ALSO:

Create a Survey

Assign Permission Set for Retail Execution and Action Plan to Users

Assign the Retail Execution permission set to your users to provide access to visits, tasks, and more.

Assign the Retail Execution permission set to your users to provide access to visits, tasks, and more. Before assigning the permission set to your users, make sure Retail Execution is enabled for your org.

1. From Setup, enter `Permission Sets` in the Quick Find box.
2. On the Permission Sets page, click a link for one of the Retail Execution permission sets.
3. Select **Manage Assignments**.
4. You can see the list of all users having the permission set. To add a user, click **Add Assignments**.

Follow the same steps to assign the **ActionPlans** permission set to users.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Create a User Profile and Provide Access to Objects

Provide your users access to the required objects by assigning a user profile. To manage access, you can set and change the standard object permissions.

1. From Setup, enter `Profiles` in the Quick Find box.
2. Under **Users**, select **Profiles**.
3. Clone the Standard User profile, and assign it a name.

   You can now assign the objects, page layouts, and permissions to the profile.
4. At the page header level, click **Edit** and navigate to the standard object permissions section.
5. Assign create, read, update, delete, and view all permissions in the required combinations to the following objects:
   - Accounts
   - Action Plans
   - Action Plan Templates

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

- Addresses
- Assessment Indicator Definition
- Assessment Task Content Documents
- Assessment Task Orders
- Assessment Tasks
- Assortment Products
- Assortments
- Category
- Contacts
- Images
- In-Store Locations
- Locations
- Operating Hours
- Orders
- Products
- Promotion Products
- Promotions
- Retail Stores
- Retail Visit KPIs
- Store Assortments
- Store Products
- Visits

The permissions control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for sales reps, sales managers, territory manager, and administrators.

SEE ALSO:

User Permissions

Permission Set Licenses

Object Permissions

Concepts of Retail Execution

To get familiar with Retail Execution, review the terms.

EDITIONS

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Action Plan Template

A reusable framework where you can add tasks to be performed during a visit. You can use an action plan template to create multiple visits.

Assessment Indicator Definition

A parameter to evaluate your business's performance. Field reps capture real-time data against these parameters. Examples of assessment indicator definition are count of a product on a shelf and share of a product on a shelf.

Assessment Task

An activity that the field rep performs while on a store visit. The tasks can be an inventory check, planogram check, promotion check, conduct survey, or some other custom activity.

Assortment

A group of products eligible for sale at a particular store, store group, or account.

Custom Task

An activity that you can configure in Retail Execution to capture specific information.

In-Store Location

An aisle, a shelf, a payment counter, back room, or some other location within a store layout. You can create in-store location category to group similar in-store locations.

Planogram

A visual representation of product placement on a shelf.

Promotion Channel

A store, store group, or an account where a promotion is applicable.

Retail Store

A place of business where products are sold to consumers. Field reps visit these places to perform various merchandising and delivery activities.

Retail Store Group

A group of similar retail stores. You can group stores based on similarities such as store size, store location, and the products sold in the stores.

Visit

An act where a field rep goes to a retail store and performs certain tasks.

Accounts and Contacts in Retail Execution

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Use accounts to store information about customers or individuals you do business with. Use contacts to store information about the people you do business with. Contacts are associated to accounts, and each retail store in an account can have a different primary contact.

The following objects in Retail Execution are associated to an account:

- **Retail Store:** A retail store must be associated to an account. You can group stores from different accounts to create a store group.
- **Contact:** A primary contact must be associated to an account.
- **Promotions:** General promotions can be associated to an account.
- **Assortments:** An assortment can be associated to an account. You can also associate an assortment to a store or a store group and not to an account.

SEE ALSO:

Manage Accounts and Contacts

Manage Your Stores Efficiently

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Simplify the way you track stores, in-store locations, and the products sold in these stores by grouping. Managing large numbers of individual stores, in-store locations, and products can be time consuming and confusing. It's hard to track which products are sold in which stores and where products are placed in each store. Grouping creates smaller numbers of store groups, in-store location categories, and assortments, making it easy to manage.

Create a Location
Location is the physical addresses of the places where your stores operate.

Create a Retail Store Group
A group of similar retail stores. You can group stores based on similarities such as store size, store location, and the products sold in the stores.

Create a Retail Store
A place of business where products are sold to consumers. Field reps visit these places to perform various merchandising and delivery activities.

Create an In-Store Location Category
You can create an in-store location category to group similar in-store locations across a store group. For example, create an in-store location category of Back Rooms. You can then map all back rooms across a store group to the Back Rooms in-store location category.

Create an In-Store Location
An aisle, a shelf, a payment counter, back room, or some other location within a store layout. You can create an in-store location category to group similar in-store locations.

Create a Location

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Location is the physical addresses of the places where your stores operate.

1. In the App Launcher, under All Items, click **Locations** and then click **New**.
2. Enter a name for the location.
3. Select if the location is a site, van, plant, virtual, or warehouse.
4. In **Visitor Address**, provide addresses either based on locations or accounts.
5. Enter the longitude and latitude of the location, and driving directions, if required.

   Note: You can enter longitude and latitude only if you have added the fields in your page layout.

6. Provide the store location time zone.
7. If a store is part of a chain, provide a parent location of the main store.
8. Click **Save**.

Create a Retail Store Group

A group of similar retail stores. You can group stores based on similarities such as store size, store location, and the products sold in the stores.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Retail Store Group** and then click **New**.
2. Provide a name and a description to the store group.
3. Click **Save**.

Create a Retail Store

A place of business where products are sold to consumers. Field reps visit these places to perform various merchandising and delivery activities.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Retail Stores** and then click **New**.
2. Enter a name for the store.
3. Create a location or search for an existing location.
4. Select store type as one of the following:
   - **Regular Store**: Any standard retail store.
   - **Flagship Store**: The primary store of a chain.
   - **Virtual Store**: An online retail website.
   - **Van Store**: Food truck or delivery business.
5. Set a priority of high, medium, or low for a store to manage your operations and clientele better.
6. (Optional) Fill the following fields:
   - **Operating Hours**: Select the operating hours for the store. You can also create operating hours by selecting **Operating Hours** in the App Launcher.
   - **Preferred Visit Hours**:Select the preferred time to visit the store. You can also create a preferred time by selecting **Operating Hours** in the App Launcher.
   - **Delivery Method**: Select a preferred delivery method such as a pickup truck or a van. You can customize the picklist values based on your business requirements.
   - **Payment Method**: Select the preferred mode of payment such as cash, credit, or cheque. You can customize the picklist values based on your business requirements.
   - **Delivery Frequency Type**: Select if you want to deliver products to the store daily, weekly, or monthly.
   - **Delivery Frequency**: Based on your selection of **Delivery Frequency Type**, enter the number of times you want to deliver products to the store.
7. Select the account with which the store is associated.
8. Select the required store group. Ensure that you select a store group, as you can't create Retail Store KPI without a store group.
9. Select the primary contact of the store who the field rep can contact when necessary.
10. Click **Save**.

Create an In-Store Location Category

You can create an in-store location category to group similar in-store locations across a store group. For example, create an in-store location category of Back Rooms. You can then map all back rooms across a store group to the Back Rooms in-store location category.

EDITIONS

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1. From Setup, go to Object Manager.
2. Enter `In-Store Location` in the Quick Find box.
3. In the Fields and Relationships section, select **Category**. In the **Category Picklist Values** section, you can view the existing categories.
4. Click **New** to add new values.
5. Click **Save**.

Create an In-Store Location

An aisle, a shelf, a payment counter, back room, or some other location within a store layout. You can create an in-store location category to group similar in-store locations.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Retail Stores** and select the retail store for which you want to add an in-store location.
2. On the Related tab of a retail store record, under In-Store Locations, click **New**.
3. Enter a name for the in-store location.
4. Select the **In-store Location Type**.

   Note: Define the picklist values for **In-Store Location Type** in Object Manager.

5. Select the planogram associated to the in-store location, if any.
6. Seacrch and add an **In-Store Location Category** to group similar in-store locations across a store group.
7. Select the location of the store.
8. Click **Save**.

Products, Product Categories, and Assortments

Create product categories by grouping products based on their physical attributes. You can also group products based on their selling capabilities to create assortments. One assortment can have products from different categories.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Create a Product

You can either create one product at a time in the application or import high-volume product information using Data Loader.

Associate a Product to a Store

You can associate the products to a store to track all the products sold at a specific store. You can also mark the top-selling products as favorite.

Create a Product Category

For ease of operation, group products into product categories based on similarities such as their physical attributes.

Associate a Product to a Product Category

One product can be associated to multiple categories.

Create an Assortment

An assortment is a group of products eligible for sale at a particular store, store group, or account. One assortment can have products from different categories.

Associate a Product to an Assortment

Associate multiple products to an assortment based on their selling capabilities. While associating a product to an assortment, you can even mark the top-selling products as favorites. You can also enter default quantities for products that are ordered in bulk.

Associate an Assortment to a Store, a Store Group, or an Account

As a best practice, associate an assortment to a store group level. If you have an assortment at store group level and another assortment at store level, the store level assortment takes precedence.

Create a Product

You can either create one product at a time in the application or import high-volume product information using Data Loader.

Review the following considerations for products:

- To view and create products, you need the Read and Create permissions on Products.
- Products need a standard active price before you can add them to a price book.

1. In the App Launcher, under All Items, click **Products** and then click **New**.
2. Enter name and description for a product.
3. Provide a link to where an image of the product is stored.
4. Enter an ExternalID. Ensure that you add an ExternalID as it is a key identifier in Retail Execution and is used as labels in Einstein Object Detection models.

   Note: You can enter External ID only if you have added the field in your page layout.

5. Click **Save**.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

SEE ALSO:

Set and Edit Product Prices

Data Loader

Associate a Product to a Store

You can associate the products to a store to track all the products sold at a specific store. You can also mark the top-selling products as favorite.

1. In the App Launcher, under All Items, click **Retail Stores**.
2. Select the required store.
3. On the Related tab, under Products, click **Add**.
4. Select the date from which the association is applicable.
5. Select a product. You can mark the product as Favorite and enter a default quantity.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

6. Click **Save**.

Create a Product Category

For ease of operation, group products into product categories based on similarities such as their physical attributes.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Note: To create a product category, you must create a product catalog.

1. In the App Launcher, under select All Items, click **Categories** and then click **New**.
2. Enter a name for the category.
3. Select the catalog to which the category would belong to.
4. Select **Active**, if required.

   Note: Inactive products don't appear in searches for users whose profile allows only Read access to products.

5. Click **Save**.

SEE ALSO:

Catalog

Associate a Product to a Product Category

One product can be associated to multiple categories.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Categories**.
2. Select the required product category.
3. On the Related tab, click **Assign Products**.
4. Select the products you want to add to the category. You can add multiple products.
5. After you have selected all the products you want to add to the category, click **Next**.
6. Review the products you've added and click **Save**.

Create an Assortment

An assortment is a group of products eligible for sale at a particular store, store group, or account. One assortment can have products from different categories.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Assortments** and click **New**.
2. Enter a name and description for the assortment.
3. Click **Save**.

   Tip: When operating with high volumes of data, use Data Loader to quickly import list of stores and products and associate them to assortments.

SEE ALSO:

Data Loader

Associate a Product to an Assortment

Associate multiple products to an assortment based on their selling capabilities. While associating a product to an assortment, you can even mark the top-selling products as favorites. You can also enter default quantities for products that are ordered in bulk.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Assortments**.
2. Select the required assortment.
3. On the Related tab, under Products, click **Add**.
4. Search for and add the required product. You can mark the product as **Favorite** and enter a default quantity.
5. Click **Save**.

Associate an Assortment to a Store, a Store Group, or an Account

As a best practice, associate an assortment to a store group level. If you have an assortment at store group level and another assortment at store level, the store level assortment takes precedence.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Assortments**.
2. Select the required assortment.
3. On the Related tab, under Accounts, Stores, Store Groups, click **Add**.
4. Search for and add the required retail store, store group, or account.
5. Select the date from which the association is applicable.
6. (Optional) Select the date from which the association is no longer valid.
7. Click **Save**.

Promotions

Promotions play a significant role in increasing product sales. Promotions can be a part of a larger campaign to spread awareness about a new product or can be a part of a targeted objective.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Types of Promotions
You can run promotions at three levels: product category, individual product, and general promotion.

Create a Promotion
Create a promotion and associate it to promotion check tasks.

Associate a Promotion to a Product or Product Category
You can associate a promotion to a product, or product categories. You can also add related files such as banners, promotion specifications, pictures, and other detailed documents.

Associate a Promotion to a Store, a Store Group, or an Account
You can associate a promotion to a store, store groups, and accounts to define the promotion channel.

Types of Promotions

You can run promotions at three levels: product category, individual product, and general promotion.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Product Category Level

Set the promotion level as **Product Category** for promotional activities that are running for a product category. For example, to clear out stock before winter, you offer a 50% discount on all beverages sold across all stores. You can use the product category level promotion check to verify the percentage increase in sales of the discounted products.

Product Level

Set the promotion level as **Product** for promotions that are running for specific products. For instance, your company launches a new flavor of ice cream. To increase product adoption and get early feedback, you can offer free samples in specific stores. Run a product level promotion check to track the number of samples consumed and customer feedback on the samples.

General

Set the promotion level as **None** for promotions that are running without a context of any product or product category. For example, to boost overall sales, your company instructs all stores in a store group to offer $10 coupons to consumers on purchases above $150. You can run a general promotion check to ensure that adequate coupons are available for circulation and that banners are placed at strategic locations.

Create a Promotion

Create a promotion and associate it to promotion check tasks.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Promotions** and then click **New**.
2. Enter a name for the promotion.
3. Provide a description and objective for the promotion.
4. Choose a **Category** such as advertising, sales promotion, or publicity.

   Note: You can customize the picklist values from the Object Manager according to your org's requirements.

5. Select the **Level** for the promotion as either product, product category, or none.
6. Select a **Method** for the promotion. It can be offering discounts, displays and exhibitions of products, sampling sessions, or free services. You can customize the picklist values from the Object Manager according to your org's requirements.
7. Mark the promotion as active if required.
8. Select the date range for which the promotion must be valid.
9. Click **Save**.

Associate a Promotion to a Product or Product Category

You can associate a promotion to a product, or product categories. You can also add related files such as banners, promotion specifications, pictures, and other detailed documents.

EDITIONS

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1. In the App Launcher, select **Promotions** from All Items.
2. Select the required promotion.
3. In the **Related** tab of the promotion, you can:
   - Add files that field reps can refer to during a visit.
     - Click **Add** in the **Files** related list.
     - Select the required files and click **Save**.
   - Associate the promotion to products or product categories.
     - Click **Add** in either the **Products** or the **Product Categories** related list.
     - Select the required options and click **Save**.

Associate a Promotion to a Store, a Store Group, or an Account

You can associate a promotion to a store, store groups, and accounts to define the promotion channel.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, select **Promotions**.
2. Select the required promotion.
3. On the Related tab of the promotion, under Stores, Store Group, Accounts, click **Add**.
4. Search for and add required retail store, store group, or account.
5. Select the start date from which the promotion is valid.
6. (Optional) Specify an **In-Store Location** if you want a promotion to be applicable at a specific location. For example, you may want to place a banner near the payment counter to attract customers.
7. Click **Save**.

Note: If you have associated a promotion at the store level and another one at the store group level, both of the promotions are applicable to the store.

Planograms

Product placement plays a critical role in attracting consumer attention. A planogram check helps track how your products appear to consumers on a shelf and your products' share-of-shelf percentage at specific in-store locations.

EDITIONS

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Add an Image

The shelves for which field reps can perform planogram check tasks, add an image representing the expected shelf display.

[Associate a Planogram to an In-Store Location](#)

An image must be associated with an in-store location to enable the field reps to perform planogram check tasks on that in-store location.

Add an Image

The shelves for which field reps can perform planogram check tasks, add an image representing the expected shelf display.

1. In the App Launcher, under All Items, click **Images** and then click **New**.
2. Enter the name of the image.
3. Enter **URL** of the location where the image is available or select the image **File**.
4. Select the image **Category**.
5. In the **Image Type** list, select None.
6. Select **Active**, if necessary.
7. Click **Save**.

EDITIONS

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Associate a Planogram to an In-Store Location

An image must be associated with an in-store location to enable the field reps to perform planogram check tasks on that in-store location.

1. In the App Launcher, select **Retail Store** from All Items.
2. Select the required store.
3. In the **Related** tab of the store, select the in-store location for which you want to add an image.
4. Edit **Planogram** and upload the required image.
5. Click **Save**.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Action Plan Items and Assessment Tasks

When field reps visit a particular retail store, they must have an action plan. Action plan is a list of action plan items. Each item can be of various assessment task types.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

[Types of Assessment Tasks](#)

You can create several types of assessment tasks to capture business data. Inventory check, Planogram check, In-store Survey, Promotion check, and Order Creation are provided in Retail Execution. However, if you have specific business needs, you can leverage the configurability of Retail Execution and create custom tasks.

[Create an Assessment Indicator Definition](#)

When field reps visit stores to perform tasks, there must be some parameters against which field reps can capture real-time data. These indicators are called Assessment Indicator Definitions. For example, the assessment indicator definition for inventory check task can be to check the count of a product on a shelf, or product facings on a shelf.

[Create a Retail Store KPI]

The Retail Store KPIs help you define targets for assessment indicator definitions. Field reps can then capture actual information against the targets when they perform assigned tasks during a visit. For example, you can define the target for inventory count of a product as 10.

Types of Assessment Tasks

EDITIONS

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You can create several types of assessment tasks to capture business data. Inventory check, Planogram check, In-store Survey, Promotion check, and Order Creation are provided in Retail Execution. However, if you have specific business needs, you can leverage the configurability of Retail Execution and create custom tasks.

Inventory Check

Use this task type to track products in a store. Field reps can check and update information about product availability and their placements at in-store locations and take orders for the products. While performing an inventory check task, a field rep can select an in-store location to capture the information for products available at that location.

Inventory check tasks capture inventory available, product share of shelf, and its facings at a location. The inventory check task helps you monitor and analyze when products need restocking, or how well products are distributed.

Promotion Check

Use this task type to audit the promotions running at a store. Field reps can check if promotions are running according to agreed upon terms, or if the store is prepared for upcoming promotions.

A promotion can be associated to a store, a store group, or an account and can be tied to a product or a product category.

Planogram Check

You can use this task type to check the number of facings and share of shelf of a product.

If you've enabled Einstein Object Detection for your org, you can automate the process of planogram checks. Field reps can click and upload an image of the in-store location. Einstein Object Detection then compares both the images and returns the result about the products and their facings at that in-store location. Field reps can correct the information returned by Einstein Object Detection: the missing or incorrect product tag and the quantity of a product available at the in-store location. Correcting the result returned by Einstein Object Detection helps to update the model and ensures better result next time.

If you haven't enabled Einstein Object Detection for your org, field reps can manually capture the quantity and the number of facings of a product at an in-store location.

Order Creation

Use this task type if you want field reps to take orders for the products that need replenishment. Field reps can either reorder a previous order or take fresh orders. If field reps are reordering a previous order, they can change the quantities of the products to be ordered. When placing new orders, field reps can take orders for all products available at a store, specific assortments, or only the products that are marked as favorites.

In-Store Survey

You can use this task type only if you've enabled Surveys for your org. Create survey invitations that field reps can use to conduct surveys. You can generate survey invitations with the context of retail store ID, specific visit ID, or store contact in the subject. Conducting surveys helps gather information and feedback from store staff and consumers.

Other

Use this task type to create a custom task. Field reps can use custom tasks to capture data that can't be captured with the provided task types. A prerequisite for creating a custom task is to create a custom object. For more information on how to create custom objects, see here.

You can add multiple custom tasks to a visit.

SEE ALSO:

Create a Custom Object in Lightning Experience

Create an Assessment Indicator Definition

EDITIONS

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When field reps visit stores to perform tasks, there must be some parameters against which field reps can capture real-time data. These indicators are called Assessment Indicator Definitions. For example, the assessment indicator definition for inventory check task can be to check the count of a product on a shelf, or product facings on a shelf.

1. In the App Launcher, under All Items, click **Assessment Indicator Definitions** and then click **New**.
2. Enter the name and description for the indicator.
3. Select a data type. The data types available are Number, Boolean, Percentage, Date Time, Text, or Decimal.
4. Click **Save**.

Create a Retail Store KPI

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

The Retail Store KPIs help you define targets for assessment indicator definitions. Field reps can then capture actual information against the targets when they perform assigned tasks during a visit. For example, you can define the target for inventory count of a product as 10.

1. In the App Launcher, under All Items, click **Retail Store KPIs** and then click **New**.
2. Select the following:
   - **Retail Store Group**: Required as KPIs can't be defined at store level.
   - **In-Store Location Category**: Required if KPI must be inherited by all in-store locations across the store group in this category.
   - **Product**: Required if you've inventory check tasks for the store group.
3. Select the **Assessment Indicator Definition** for which you are defining the targets.
4. Select the **Unit of Measure** in which field reps capture actual values against the assessment indicator definition targets.
5. Select the **KPI Type** for defining the business type of assessment indicator definition.
6. Enter the following dates:
   - **Effective From**: Date from which the target is valid for the store group.
   - **Effective To**: Date until which the target is valid for the store group.
7. Select a **Product Category** if your promotions for this store group are at the product category level.
8. Select either a **Planogram**, a **Promotion**, or a **Custom Context**, as applicable.

9. Define the **Target Value** for the assessment indicator. You can enter the targets in number, boolean, date time, decimal, and text formats.
10. Click **Save**.

Action Plan Template

Action plan template is a reusable framework that you can use to schedule visits where the set of activities to be performed in each visit remains constant.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Create an Action Plan Template

Create action plan templates with different set of tasks. You can then use the action plan template to create multiple visits.

Associate Task to an Action Plan Template

Add all the tasks that must be performed for similar visits to an action plan template. You can then use the template to create multiple visits.

Publish a Template

To use an action plan template to create visits, publish a template. Ensure that you've added the required tasks before you publish a template as you can't add tasks to published templates.

Create an Action Plan Template

Create action plan templates with different set of tasks. You can then use the action plan template to create multiple visits.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under , click **Action Plan Templates** and then click **New**.
2. Enter a name and a description for the template.
3. Select the **Target Object** as **Visit**.
4. Select the **Action Plan Type** as **Retail**.
5. Click **Save**.

Associate Task to an Action Plan Template

Add all the tasks that must be performed for similar visits to an action plan template. You can then use the template to create multiple visits.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

1. In the App Launcher, under All Items, click **Action Plan Templates**.
2. Select the required template.
3. Click **New Tasks**.
4. Enter the name and description of the task.
5. Select the type of the tasks.
6. Select **Required** if you want to make the task mandatory to perform.
7. Select the **Assessment Indicator Definitions** that you want to associate to the task. You can select multiple Assessment Indicator Definitions for a task.

8. Click **Save**.

Publish a Template

To use an action plan template to create visits, publish a template. Ensure that you've added the required tasks before you publish a template as you can't add tasks to published templates.

1. In the App Launcher, select **Action Plan Templates** from All Items.
2. Select the required template.
3. Review the tasks that you've added to the template and click **Publish Template**.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Visit

A visit is an act where a field rep goes to a retail store and performs certain tasks.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Create a Visit
To assign tasks to field reps, create visits for a store.

Add Action Plans to Visit Record Lightning Pages
To use action plans for visits, add Action Plans List Lightning component to the visit record page.

Associate an Action Plan Template to a Visit
Associate a visit for a store to an action plan template that has the tasks that field reps can perform at the store.

Visits: Points to Consider
Points to consider when you create visits.

Create a Visit

To assign tasks to field reps, create visits for a store.

1. In the App Launcher, under All Items, click **Visits** and then click **New**.
2. Select the store for which you are creating the visit.
3. Set a **Visit Priority**.
4. Set a **Date** and **Time** for when you expect the visit to start. The actual start time can vary based on runtime activity of the field rep.
5. Set a **Date** and **Time** for when you expect the visit to end. The actual end time can vary based on runtime activity of the field rep.
6. Provide **Special Instructions** to the field rep if any. You can include instructions to speak to the store manager or to rearrange products.
7. Select the name of the sales rep that you want to assign for this visit.
8. Click **Save**.

EDITIONS

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Add Action Plans to Visit Record Lightning Pages

To use action plans for visits, add Action Plans List Lightning component to the visit record page.

1. In the App Launcher, under All Items, click **Visits**.
2. Select the required visit.
3. On the visit record page, from Setup, select **Edit Page**.
4. In the component palette, select **Action Plans List - Financial Services Cloud** and drag it to where you want it on the page.
5. Save the page.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Associate an Action Plan Template to a Visit

Associate a visit for a store to an action plan template that has the tasks that field reps can perform at the store.

1. In the App Launcher, under All Items click **Visits**.
2. Select the required visit.
3. On the Related tab of the visit, under Action Plan click **New Plan**.
4. Enter a name for the action plan.
5. Search for and add the action plan template that you want to assign to the visit.

   Note: You can assign only published templates.

6. Click **Next**.
7. Review the tasks that are associated to the template and if you've all the tasks that need to be performed for the visit.
8. Click **Save**.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

Visits: Points to Consider

Points to consider when you create visits.

- You can associate a visit only to a store.
- Before creating a visit for a store, ensure that you've associated store KPIs and products to the store.
- The standard values for visit priority are high, medium, and low. But you can define your own values.
- It's a good practice to set the visit's planned start and end time within the store's operating hours.
- Provide special instructions, if required. These instructions are available for your field reps and help them understand the activities that can be completed outside the defined tasks.

EDITIONS

Available in Lightning Experience in **Unlimited** and **Enterprise** Editions that have Consumer Goods Cloud enabled.

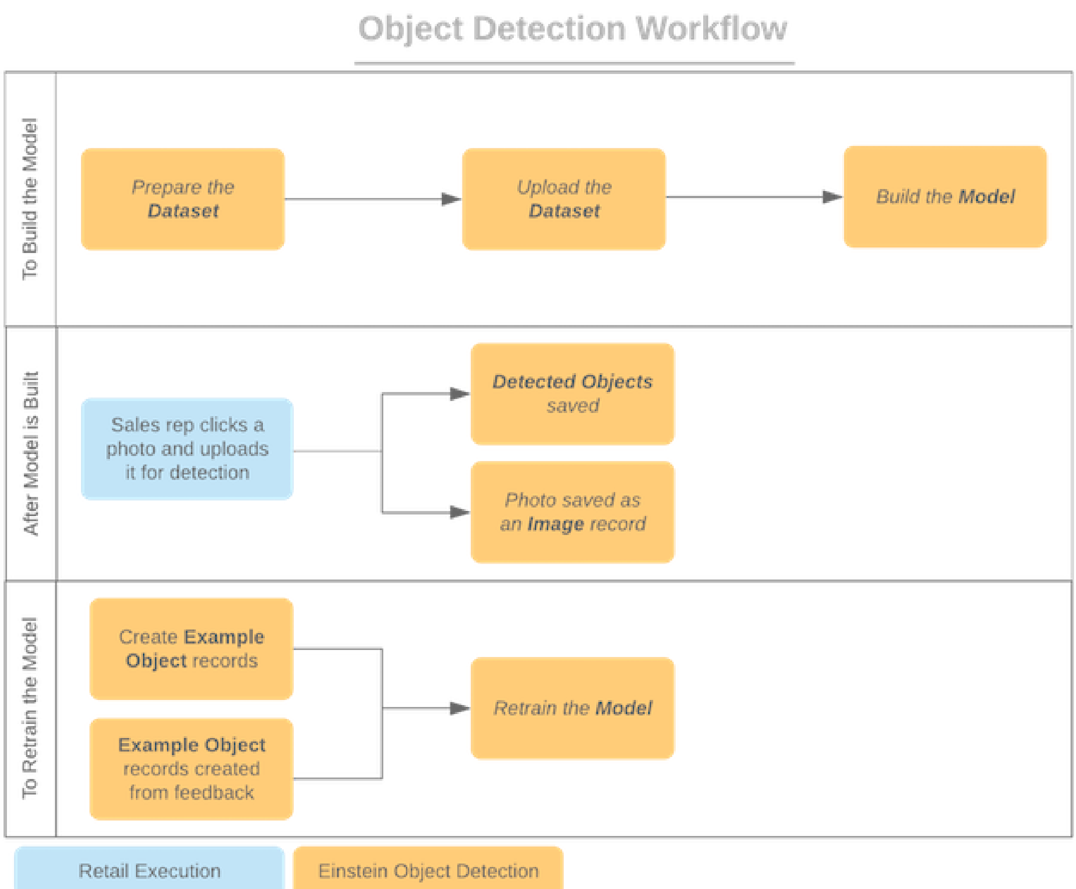
Einstein Object Detection

Einstein Object Detection detects, identifies, and locates objects in images. For instance, a field rep clicks the photo of a shelf in a retail store and can use it for object detection.

Before we start, let's look at the complete workflow for Einstein Object Detection.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.



Create a Permission Set to Use Einstein Object Detection

Create a permission set to let users detect and identify objects in images and provide feedback with Einstein Object Detection. Then assign the permission set to field reps who use Einstein Object Detection.

Prepare Einstein to Detect Objects

To teach Einstein to detect objects, you build an object detection model using a dataset. The dataset contains images of the objects that you want the model to detect, along with their labels and annotations.

Considerations for Images Provided for Detection

The object detection model detects objects in images that are of a specific size and format. The image size can be up to 5 MB. The image must be in one of the following formats: PNG, JPG, or JPEG.

Review Detected Objects

Admins can review the performance of the object detection model by reviewing the objects it has detected. Each object detected by the model is saved as a Detected Object record.

Improve the Model

To improve the model accuracy or to add objects, add Example Object records. Update the model using these Example Object records.

Create a Permission Set to Use Einstein Object Detection

Create a permission set to let users detect and identify objects in images and provide feedback with Einstein Object Detection. Then assign the permission set to field reps who use Einstein Object Detection.

1. From Setup, in the Quick Find box, enter `Permission Sets`.
2. Click **New**.
3. Name the permission set, for example, Einstein Object Detection.
4. For License, select **Salesforce**.
5. Click **Save**.
6. In the Apps section, click **Object Settings**.
7. Select the following objects, click **Edit**, and provide permissions for each.

Object	Permissions
Datasets	Read AND View All
Detected Objects	Create, Read, Edit, AND, Delete
Example Objects	Create, Read, Edit, AND, Delete
Images	Create, Read, Edit, Delete, AND, View All
Vision Models	Read AND View All

8. Click **Save**.

Assign the permission set to users.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

SEE ALSO:

Assign Permission Sets to a Single User

Assign a Permission Set to Multiple Users

Prepare Einstein to Detect Objects

To teach Einstein to detect objects, you build an object detection model using a dataset. The dataset contains images of the objects that you want the model to detect, along with their labels and annotations.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

Einstein Object Detection Dataset Guidelines

The dataset is a zip file that contains the images along with their labels and annotations. Review these guidelines on how to prepare your zip file.

Labels and Annotations Guidelines

The dataset includes labels for the objects and annotations for each object's bounding box coordinates. After the model is built, the model uses the labels and annotations to detect and identify objects. You add the labels and annotations to a .csv file named annotations.csv. Review these guidelines on how to prepare the annotations file.

Upload the Dataset

A Dataset record is used to upload the dataset file. After the dataset file is uploaded, you can use it to build a model.

Build the Model

After the dataset file is uploaded, it is used to build a model. The model detects objects that are part of an image.

Review the Model Quality

Before using a model, check how accurately the model is identifying each object. Each time a model is updated, its quality and accuracy in identifying objects changes.

Einstein Object Detection Dataset Guidelines

The dataset is a zip file that contains the images along with their labels and annotations. Review these guidelines on how to prepare your zip file.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

Creating the dataset file:

- Your dataset can be up to 10 GB.

  Tip: If your zip file is more than 20 MB, to improve performance, we recommend uploading it to a cloud location that doesn't require authentication.

- The zip file name can be up to 100 characters.
- The maximum size of image is 1 MB.

Naming image files:

- The maximum length of an image file name is 150 characters, including the file extension.
- If an image file name contains spaces, the spaces are removed from the file name before uploading.
- If an image file name has non-ASCII characters, the characters are converted to UTF-8.

Labels and Annotations Guidelines

The dataset includes labels for the objects and annotations for each object's bounding box coordinates. After the model is built, the model uses the labels and annotations to detect and identify objects. You add the labels and annotations to a .csv file named annotations.csv. Review these guidelines on how to prepare the annotations file.

EDITIONS

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The header row contains the name of the file containing the images and the bounding boxes for the objects in the image. The image with the most objects determines the number of bounding boxes in each header row. For example, if the image containing the most number of objects has seven objects, each header row must contain box0,box1,box2,box3,box4,box5,box6.

Each row after the header specifies the bounding box descriptions in JSON format for each image. Each image must have its own row, and the image name must be the exact name of the image file. Multiple bounding boxes for the same image are listed as separate columns in the same row.

The required fields for each bounding box are:

- Label—Name of the object contained in the bounding box

  Warning: Don't include special characters in labels.

- X—Location of the bounding box on the horizontal axis
- Y— Location of the bounding box on the vertical axis
- Height —Height of the bounding box in pixels
- Width—Width of the bounding box in pixels

The annotations.csv file uses this formatting.

```
image_url,box0,box1,box2,box3,box4,box5,box6,box7
20171030_133845.jpg,"{""label"": ""Image 1 - Object 1 Name"", ""x"": 548, ""y"": 497,
""height"": 1612, ""width"": 1041}","{""label"": ""Image 1 - Object 2 Name"", ""x"": 1635,
 ""y"": 571, ""height"": 1370, ""width"": 904}","{""label"": ""Image 1 - Object 3 Name"",
 ""x"": 2580, ""y"": 383, ""height"": 1553, ""width"": 1059}",,,,,
20171030_133911.jpg,"{""label"": ""Image 2 - Object 1 Name"", ""x"": 374, ""y"": 2299,
“”height"": 1147, ""width"": 861}","{""label"": ""Image 2 - Object 2 Name"", ""x"": 1263,
 ""y"": 2226, ""height"": 1038, ""width"": 752}","{""label"": ""Image 2 - Object 3 Name"",
 ""x"": 179, ""y"": 709, ""height"": 1464, ""width"": 1056}","{""label"": ""Image 2 -
Object 4 Name”", ""x"": 2327, ""y"": 746, ""height"": 1470, ""width"": 697}","{""label"":
 ""Image 2 - Object 5 Name”", ""x"": 1312, ""y"": 752, ””height"": 1434, ""width"":
831}","{""label"": ""Image 2 - Object 6 Name"", ""x"": 2059, ""y"": 2378, ""height"": 1080,
 ""width"": 965}",,
```

Upload the Dataset

A Dataset record is used to upload the dataset file. After the dataset file is uploaded, you can use it to build a model.

Note: Before you create a Dataset record, the dataset file must be available in Salesforce Files within your org or in a cloud location that doesn't require authentication.

1. In the App Launcher, click **Datasets**.
2. Click **New**.
3. Name the dataset.
4. Select **Object Detection** as the Content Type.
5. Add the dataset file to the Dataset record in one of the following ways.
   - Search for the file in Salesforce Files within your org.
   - Add the URL of the cloud location where your file is uploaded.
6. Click **Save**.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To upload the dataset:
- Customize Application

The dataset file is uploaded on clicking Save.

Build the Model

After the dataset file is uploaded, it is used to build a model. The model detects objects that are part of an image.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To build the model:
- Customize Application

1. In the App Launcher, click **Datasets**.
2. Select the dataset that you want to use to build the object detection model.
3. On the Details tab, confirm that the status of the dataset is Upload Complete.
4. Click **Build**.
5. When prompted, name the model record, and click **Save & Build**.

   A model record is created. Model records contain the model and build details. A model can take some time to build. Track its progress by reviewing the Build Progress field in the model record. Model records are read-only.
6. To review the progress, in the App Launcher, click **Vision Models**.
   a. On the Vision Models list view, select the model that you want to track the progress of.
   a. On the Details tab, the Build Progress field shows what percentage of the model is built.

      After the build is complete, the status of the model record changes to Build Complete.

Review the Model Quality

Before using a model, check how accurately the model is identifying each object. Each time a model is updated, its quality and accuracy in identifying objects changes.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To build the model:
- Customize Application

1. Review how accurately the model is detecting each object.
   a. In the App Launcher, click **Object Metrics**.
   b. Select the object to review.
   c. On the Details tab, review its accuracy.
2. Review the model quality.
   a. In the App Launcher, click **Model Metrics**.
   b. Select the model to review.
   c. On the Details tab, review its accuracy.

Considerations for Images Provided for Detection

The object detection model detects objects in images that are of a specific size and format. The image size can be up to 5 MB. The image must be in one of the following formats: PNG, JPG, or JPEG.

EDITIONS

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Review Detected Objects

Admins can review the performance of the object detection model by reviewing the objects it has detected. Each object detected by the model is saved as a Detected Object record.

1. In the App Launcher, click **Detected Objects**.
2. Select the Detected Object record that you want to review.

   The label of the detected object is populated as the name of the Detected Object record.
3. On the Details tab, review the following information.
   - Image in which the object was detected.
   - Model that detected the object.
   - Coordinates of the detected object.
   - Probability with which the object was detected.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To review Detected Object records:
- Customize Application

Improve the Model

To improve the model accuracy or to add objects, add Example Object records. Update the model using these Example Object records.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

Prepare to Update the Model

You create an Example Object record for each object that you want to add to the model or to improve detection. Example Object records are also created when field reps edit product tags to provide feedback about missing or incorrectly tagged objects.

Update the Model

You can update a model at any time. A model is updated using the Example Object records that are associated with the model's record.

Prepare to Update the Model

You create an Example Object record for each object that you want to add to the model or to improve detection. Example Object records are also created when field reps edit product tags to provide feedback about missing or incorrectly tagged objects.

Note: When updating a model, only images that are 1 MB or smaller are used.

1. In the App Launcher, click **Example Object**.
2. Click **New**.
3. Name the Example Object record.
4. Add the image that the example object is a part of.
5. Search for and add the model to update.
6. Add the annotations for the example object.
7. Label the example object with the name of the object.
8. For Object Type, select **Feedback**.
9. Click **Save**.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To create example object records:
- Customize Application

Update the Model

You can update a model at any time. A model is updated using the Example Object records that are associated with the model's record.

Tip: Update the model after you have at least 100 Example Object records.

1. In the App Launcher, click **Vision Models**.
2. On the Vision Models list view, select the model that you want to update.
3. Click **Update**.

Use the Build Progress field to track the progress of the update.

EDITIONS

Available in: **Unlimited** and **Enterprise** Editions with the Retail Execution app.

USER PERMISSIONS

To update a model:
- Customize Application