

Retail Execution at Your Fingertips

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RETAIL EXECUTION AT YOUR FINGERTIPS

As a field rep, you're responsible for visiting retail stores and performing merchandising activities. You can check inventory, product placement, and in-store promotions. Or you take orders to restock the inventory or upsell your company's other product offerings. You conduct surveys to gather feedback from store staff and customers. The Salesforce Retail Execution mobile app helps you stay organized while you juggle your tasks. The app provides an aggregated view of the most relevant, actionable information on your mobile device without logging into multiple systems. You can focus on the tasks at hand each day, view key information for each visit, and take notes on the fly within the context of your tasks.

EDITIONS

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

Before You Begin

Ensure that your mobile device meets the system prerequisites. Also, familiarize yourself with key product terms for the app.

Take Charge of Your Day

Launch the Retail Execution app on your mobile to check the visit details of the day. When at a store, you can check the store details and start the assigned tasks.

Inventory Checks

You can track products that are on sale at a retail store.

Planogram Checks

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.

Promotion Check

Use promotion checks to assess the impact of promotions on your sales figures and on customer satisfaction.

Order Creation

To make sure that your products are never out of stock at stores, you can create orders or reorder while on store visits.

In-Store Survey

To gather feedback from store staff and customers about promotions, inventory requirements, and product quality use in-store surveys.

Custom Tasks

Your manager can create tasks for custom business scenarios. For example, your manager wants you to capture the maintenance records of a refrigerator that was placed in a store to increase beverage sales.

End Your Visit

Last step of your visit.

Before You Begin

Ensure that your mobile device meets the system prerequisites. Also, familiarize yourself with key product terms for the app.

Prerequisites

To get the most out of your Salesforce mobile app, check that your device meets these requirements:

Key Terms to Remember

To get familiar with the app, review the terms.

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Prerequisites

To get the most out of your Salesforce mobile app, check that your device meets these requirements:

- Salesforce current minimum platform requirements
- Most recent version of Retail Execution for Android and iOS
- Wi-Fi or a 3G or faster cellular network connection to communicate with Salesforce

For more information, see [here](#).

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Key Terms to Remember

To get familiar with the app, review the terms.

Visit

An instance that your manager creates for you to go to a store, perform tasks to collect information about how your business is faring, and to identify areas for improvement.

In-Store Location

An aisle, a shelf, a payment counter, back room, or some other consumer-facing location within a store layout.

Task

An activity that you perform while you visit a store. Examples include planogram check, inventory check, and promotion checks. Your manager can also create custom tasks.

Assessment Indicator

Key performance indicators that help you track and analyze your retail business at various stores. Business performance is assessed by comparing target values with the actual values you record during store visits.

Target Value

The planned value of an assessment indicator that your business wants to achieve.

Actual Value

The real-time value of an assessment indicator recorded during a store visit that reflects the actual performance of your business.

Planogram Check

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Check Visual check of in-store product placement. You can manually capture this information. But with Einstein Object Detection enabled, you can simply take a picture with your mobile camera and upload it to the cloud. Einstein Object Detection then detects the products and its facings on a shelf.

Inventory Check

Audit shelf inventory and backstock with inventory targets. Inventory checks ensure that the products are adequately stocked and that you can identify shortages easily at in-store locations.

Order Creation

Order to replenish inventory levels or to upsell or cross-sell your products. You can place orders for an individual product, an entire assortment, or only the items marked favorites by your manager in an assortment.

Assortment

A collection of products.

In-Store Survey

Mechanism to gather real-time feedback from store staff and customers using in-app templates. Use surveys to get feedback on issues such as consumer grievances, service satisfaction, and product sales.

Promotion Check

Audits the compliance and effectiveness of an ongoing promotion. Use promotion checks to verify details such as compliance with visibility guidelines and actual-to-target sales performance.

Custom Task

A store-visit activity that's not provided in Retail Execution. Your manager can create and assign tasks to help assess your company's retail business at stores.

Progress Ring

A visual indicator that shows your progress on task items. For example, if an inventory check comprises multiple, discrete stock audits, each audit has a corresponding progress ring to indicate task completion status.

Progress Bar

A visual indicator that shows your progress at the task level, such as an inventory or planogram check. You can track the completion status of sub items in a progress ring and the overall task in a progress bar.

Take Charge of Your Day

Launch the Retail Execution app on your mobile to check the visit details of the day. When at a store, you can check the store details and start the assigned tasks.

[Launch the Retail Execution App on Your Mobile](#)

Get started with Retail Execution.

[What Notes Can You Take?](#)

Notes can be taken at two levels. You can take notes for the overall visit or at the store level. You can also take notes for each task. Both types of notes are displayed on the Notes tab of a visit. The task notes can be easily identified by the task name associated with it.

[Check Out the Overview Tab](#)

The **Overview** is a treasure trove of information about the stores you visit.

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Start Your Visit

A visit's home page shows a range of information.

Launch the Retail Execution App on Your Mobile

Get started with Retail Execution.

1. In your Salesforce mobile app, tap **Menu** and then tap **Retail Execution**.
 - Your home page lists all the visits assigned to you for the day.
 - You can see the number of high-priority visits, store addresses, and the expected times for visiting a store.
 - If your manager has set up maps and addresses, you can see the location of the stores in the embedded map.
 - You can tap **Call** to contact the store manager.
2. Review the list of visits. Data points such as visit completion status and the visit priority determined by your manager help in visually scanning the list.
3. To view details and get started, tap the required visit.

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What Notes Can You Take?

Notes can be taken at two levels. You can take notes for the overall visit or at the store level. You can also take notes for each task. Both types of notes are displayed on the Notes tab of a visit. The task notes can be easily identified by the task name associated with it.

You can take notes either at the overall visit level or for specific tasks in a visit. Both types of notes appear on the **Notes** tab of a visit.

For each note, you can also view the time when you took the notes.

Click **New Notes** at the top of the page to take fresh notes.

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Check Out the Overview Tab

The **Overview** is a treasure trove of information about the stores you visit.

Special Instructions

Informal, unstructured instructions provided by your manager that are not tracked against predefined target values. Examples include pitching new products or discussing upcoming promotions with the store manager. If there are no Special Instructions, you can perform your usual tasks.

Previous Visit

List of previous visits to the store, if any. Visit records sort by date and time, with the most recent record first. Depending on your permissions, you can view up to the last 10 visits. The records can include notes associated with the visits, status of each visit, owner of the record, and completion time of each visit.

Previous Orders

Orders placed during previous visits to the store. You can view the list of products that were ordered and their corresponding quantities. Tap **Reorder** to repurpose this list for a new order.

Store Details

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Store details, such as preferred visit days and times, payment modes, and delivery frequency.

Account Details

Details of the account the store belongs to.

Start Your Visit

A visit's home page shows a range of information.

Store details: View the name, operating hours, and the priority of the store. If you visited this store previously, you can also see the average time that you took to complete visits there.

Embedded map: To navigate to a store, tap **Get Directions**. If GPS is enabled on your mobile, you are redirected to the Google Maps app on your mobile device.

Tasks: View the list of tasks assigned to you for a particular store. If you don't see any tasks on this tab, tap **Overview** to see if your manager provided special instructions. You can also gather insights by following the visit instructions.

Notes: View notes from previous visits. To add your observations about the visit or the store, tap **New Note**.

Overview: Your one-stop shop for all the information you need about a store. View store details, account details, special instructions, previous visits, and previous orders.

Start Visit: Tap this button to start a visit and trigger a timer.



Note: To ensure that you record visit completion times accurately, click **Start Visit** only after you reach the store and review your **Tasks**, **Notes**, and **Overview**.

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Inventory Checks

You can track products that are on sale at a retail store.



Note: You can see this task only if your manager assigns it to your visit.

With inventory checks, you can capture information about:

- All the products sold in the store
- Product assessment indicators such as:
 - Number of products in each in-store location
 - Share-of-shelf percentage for a product
 - Number of your product facings versus competitor product facings
 - Any other assessment indicator your manager configures
- Actual values versus target values
- Compliance of product placement across in-store locations
- Your overall observations

[Perform an Inventory Check](#)

Capture the real-time inventory level against the defined targets with minimum clicks.

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Perform an Inventory Check

Capture the real-time inventory level against the defined targets with minimum clicks.

1. Under **Tasks** tap the inventory check item.
2. In the **In-Store Location** picklist, search for the location where you want to start your inventory check. You can also check without the context of in-store locations or check for one product at a time if you set the filter to **All Locations**. Use the search option to find a specific product.
3. For each product, you can see the associated assessment indicator with its corresponding target values, if any. As you capture the actual values against a product's assessment indicators, the progress ring shows the task completion. When you finish capturing the values of assessment indicators for a product, the progress ring is green and the progress bar shows total completed product-level checks.
4. Tap **New Notes** if you want to add your observations.

When you complete all inventory checks, the inventory check item under Tasks is complete. Go back to the home page to continue with other assigned tasks.

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Planogram Checks

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.



Note: You can see this task only if your manager assigns it to your visit.

You can check your products' placement manually or with Einstein Object Detection, if your company has enabled it. You can click and upload an image of a shelf, and Einstein's Object Detection does the rest.

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[Examine the Planogram Details](#)

View the list of planograms to analyze the planograms to check.

[Capture and Upload the Image](#)

Upload images of products from in-store locations to let Einstein Object Detection compare it with the reference planogram and audit the differences.

[Validate Planogram Compliance Information](#)

To use Einstein Object Detection effectively, it's important to provide continuous feedback so that the model updates. Correct the values that Einstein Object Detection returns if needed.

[Edit Einstein Object Detection Results](#)

If there's a mismatch between the product identified by Einstein Object Detection and the actual product, you can correct the product tags in the image.

Examine the Planogram Details

View the list of planograms to analyze the planograms to check.

1. Under **Tasks** tap the planogram check item.
2. Select a planogram and tap **View Details**.
3. To view the list of products in the planogram and the reference image, tap **Product Details**.
4. Under **Planogram Compliance**, you can capture the actual values for the overall planogram. You can capture product-specific and general details. For example, you can see if banners are placed correctly.

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Capture and Upload the Image

Upload images of products from in-store locations to let Einstein Object Detection compare it with the reference planogram and audit the differences.

1. Under **Tasks** tap the planogram check item.
2. Select the required planogram and tap **Take Photo** to launch the camera app on your mobile device.
3. Position your camera so that you have all the objects in the frame and the image is clear, then click the photo. If you're happy with the photo, tap **Use Photo**, or tap **Retake**, and click again. Photo upload can take some time, and you can continue with other tasks in the meantime.
4. When the upload is complete, the **Take Photo** button is disabled. Einstein Object Detection processes the image and notifies you, even while performing other tasks.
The **Take Photo** button changes to **Review**.
5. To view the audit results tap **Review**.

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Validate Planogram Compliance Information

To use Einstein Object Detection effectively, it's important to provide continuous feedback so that the model updates. Correct the values that Einstein Object Detection returns if needed.

1. After Einstein Object Detection returns the results, tap **Review**. You can edit the values returned. You can also view the target values, if any, for each assessment indicator.
2. Compare Einstein Object Detection's values with real-time information in the store and update the actuals, if necessary.

If your org has not enabled Einstein Object Detection, you can manually capture the actual values for the planogram's assessment indicators.

Under **Product Details**, view the target values for each assessment indicator and then manually capture their corresponding actual values.

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Edit Einstein Object Detection Results

If there's a mismatch between the product identified by Einstein Object Detection and the actual product, you can correct the product tags in the image.

1. From the list of planograms returned by Einstein Object Detection, select one and tap **Edit Product Tags**.

You can see your uploaded image with bounding boxes around each detected product.

2. Tap on any of the bounding boxes in the image. Einstein Object Detection auto-populates the filter for detected product with the product name.

3. To change the product name, tap the filter, select from the available list of products, and then tap **Done**.

4. Repeat steps 1 through 4 for all the products within bounding boxes in the image.

5. When finish editing the product tags tap **Complete**. You receive in-app notification when your tag changes are successfully submitted to Einstein Object Detection.


When you finish checking a planogram, go back to the list of planograms. You can see the completed checks, and the progress bar shows the number of completed planogram checks. When you complete all planogram checks, the planogram check item under **Tasks** is marked complete.

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Promotion Check

Use promotion checks to assess the impact of promotions on your sales figures and on customer satisfaction.

 **Note:** You can see this task only if your manager assigns it to your visit.

Types of Promotion Check

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

Perform a Promotion Check

Capture the real-time promotion information on your mobile device.

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Types of Promotion Check

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

Product Category Level

Companies often run promotional activities in retail stores for selected products. 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

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Some promotions can be run for a specific product. 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

You can also run promotions across all products without specifying a specific 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.

Perform a Promotion Check

Capture the real-time promotion information on your mobile device.

1. Under **Tasks** tap the promotion check item to view a list of all current and upcoming promotions. Here, you can review the in-store locations where a promotion is run and the status of the promotion.
2. Tap the required promotion and under **Promotion Details**, check the details of the products, product categories, or general information about the promotion. You can also view reference images of banners or directives, if your manager provided them.
3. **Compliance Check**, has three sections: overall, product categories, and products. Based on the assessment indicator configuration, you can capture actual values.
4. To summarize your observations tap **New Notes**. Your manager can view these notes, which also serve as a reference for future visits to this store.
5. You can also take photos if you want to record certain promotional objects in a store. The photos are saved as your attachments and you can find them under **Compliance Check**.
6. When you finish checking a promotion, go back to the list of promotions. You can see completed checks, and the progress bar shows the number of completed promotion checks. When you complete all promotion checks, the promotion check item under **Tasks** is marked complete.

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Order Creation

To make sure that your products are never out of stock at stores, you can create orders or reorder while on store visits.

Reorder

Repurpose orders from previous visits to create orders.

Create an Order

You can create orders from the **Tasks** tab.

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Reorder

Repurpose orders from previous visits to create orders.

1. Go to **Overview** and tap **Previous Orders**. Depending on your permissions, you can see some or all previous orders, including the order date, number of items, and total order value.
2. Tap **Reorder** to reorder a complete lot. You can repurpose a previous order by tapping **Modify**.
3. Review the products selected. You can change the quantity of the products, if needed.
4. Verify the quantity and price of the products and tap **Confirm Order**.

 **Note:** You can't reorder if there is an existing cart. To reorder, delete your current cart.

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Create an Order

You can create orders from the **Tasks** tab.

 **Note:** You can see this task only if your manager assigns it to your visit.

1. Under **Tasks** tap the create order item.
2. From the **View By** picklist, select if you want to see the list of products or assortments to order.
3. Do one of the following:
 - Tap **Add All Products to Cart**.
 - To order only those products that your manager marked as favorites, tap **Show Favorites**.
 - To look for a specific product tap **Search** at the top of the screen.
4. Enter the quantity to order, and add it to the cart. **Products** marked **Favorites** come with a default order quantity. Change the quantity, if needed, before adding products to the cart.
5. Review the cart and verify the quantity, product value, and total order value.
6. Tap **Confirm Order**. The order creation item under **Task** is marked complete. However, you can continue to create orders for more products. In this case, the status of the task changes from complete to in progress.

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In-Store Survey

To gather feedback from store staff and customers about promotions, inventory requirements, and product quality use in-store surveys.

 **Note:** You can see this task only if your manager assigns it to your visit.

[Run an In-Store Survey](#)

Capture feedback with minimum clicks.

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Run an In-Store Survey

Capture feedback with minimum clicks.

1. Under **Tasks** tap the in-store survey item under **Tasks** to view the list of active surveys.
2. Tap a survey to open it in a browser.
3. Fill in the responses from participants in the store and submit the survey.

When you finish your surveys, the in-store survey item in your **Tasks** tab is marked complete. If you have issues with expired survey links, ask your manager to generate a new link. Also, you can't respond to a previously completed survey.



Warning: If you reload the Retail Execution app, you can't access completed surveys.

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Custom Tasks

Your manager can create tasks for custom business scenarios. For example, your manager wants you to capture the maintenance records of a refrigerator that was placed in a store to increase beverage sales.



Note: You can see this task only if your manager assigns it to your visit.

Perform a Custom Task

Capture the real-time promotion information on your mobile device.

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Perform a Custom Task

Capture the real-time promotion information on your mobile device.

1. Under **Tasks** tap the custom task item to view the list of custom tasks.
2. Select a custom task and enter the value for each assessment indicator.
3. To add your observations about the task tap **New Notes**.
4. When you finish with a task, return to the list of custom tasks. You can see the completed tasks, and the progress bar shows the number of completed tasks. When you finish your custom tasks, the custom item under **Tasks** is marked complete.

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End Your Visit

Last step of your visit.

1. When you complete the tasks assigned to your visit, return to the visit's home page.
2. Tap **End Visit**, if you complete all the tasks assigned to you, if not, you can:
 - Complete the visit if you completed all mandatory tasks but not all optional tasks. Enter a reason for the incomplete tasks and tap **Complete Visit**.
 - Abandon the visit if you did not complete the mandatory tasks. Enter a reason for the incomplete tasks and tap **Abandon Visit**.

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After you end, complete, or abandon a visit, you can start another scheduled visit.