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# Retail Execution at Your Fingertips

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# RETAIL EXECUTION AT YOUR FINGERTIPS

With Retail Execution, you, as a sales manager, can plan store visits for your field reps and analyze your business's health across stores. You can also use Salesforce Surveys to get insights about your business from channel partners. And, as field rep, while on a visit, you can track inventory, take orders, and capture visit details using the Retail Execution mobile app.

## Retail Execution Planning

You can track and manage the performance of stores in your territory. You can plan visits for your sales reps and assign tasks to be performed in a visit. Salesforce Maps help you to create optimized routes for your field reps. And with the CRM Analytics app, you can increase sales, improve store compliance, identify stores at risk, and maximize field reps' effectiveness. You can also use Salesforce Surveys to get insights about your business from channel partners.

## Master Data Management

Master data is a combination of legacy data and manually entered and maintained new data. Master data is the foundation of business processes and comprises business rules and functions for users, customers, regions, products, and organizational elements. Managing master data ensures consistency and control by providing processes to collect, aggregate, match, consolidate, quality-assure, and distribute data.

## Visit Execution

Execute visits by performing tasks such as 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.

### EDITIONS

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

## Retail Execution Planning

You can track and manage the performance of stores in your territory. You can plan visits for your sales reps and assign tasks to be performed in a visit. Salesforce Maps help you to create optimized routes for your field reps. And with the CRM Analytics app, you can increase sales, improve store compliance, identify stores at risk, and maximize field reps' effectiveness. You can also use Salesforce Surveys to get insights about your business from channel partners.

## 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.

### EDITIONS

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

### [Assign a Vehicle to a Rep](#)

Streamline store deliveries by creating vehicle-user assignments for reps. When a vehicle-user assignment is active, no other assignment involving that vehicle or user can be activated. Also, you can add product inventories for vehicles to let reps know the exact inventory. The information about the product inventories help reps meet ad hoc requests from a store.

### [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.

### [Planogram Set Up](#)

Product placement plays a critical role in attracting consumer attention. Examine the planogram task details, add a reference image, and associate the planogram with an in-store location.

### [Surveys](#)

Create engaging, easy-to-use surveys with a simple editor to collect feedback and information from your users or customers. You can select different types of questions to gather the data that suits your needs. After you add a question, specify the responses that participants can choose.

### [Assessment Indicator Definition](#)

Store performance can be measured by a set of parameters. These parameters are called the Assessment Indicator Definitions. For example, the count of a product on a shelf, or product facings on a shelf.

### [Retail Store KPI](#)

In Retail Store KPIs, you can define the assessment indicator definition that must be captured for a store group. Because the assessment indicator definition is associated with assessment task definition and store groups to stores, Retail Store KPIs are the link between a store and the tasks to be performed at a store. You can also define the expected values of an assessment indicator definition in Retail Store KPIs.

### [Assessment Task Definition](#)

While on a store visit, field reps perform certain activities related to the different aspects of retail execution. You can define these activities as assessment task definitions. Assessment Task definition holds information such as name, description, category, and type of task.

### [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.

### [Get Task Recommendations](#)

Sales managers plan and schedule tasks for visits. To maximize profits and deliver brand value, it's important to create the right tasks for a visit. Einstein Visit Task Recommendation helps you identify the tasks and the assessment indicator definitions that can be performed on a visit. With a single click, you can schedule tasks and assessment indicator definitions recommended by Einstein. Or, you can choose to review the list and schedule only the most important tasks and assessment indicator definitions.

### [Team Supervisors' Roles & Responsibilities](#)

Monitor and track the activities of your sales reps to achieve your team's sales objectives. Provide guidance to improve a rep's performance and ensure greater customer satisfaction. Plan the store visits of your sales reps, create store-related job lists, and assign activities to your sales reps.

### [Activities](#)

Activity is a list of questions or surveys that sales reps can answer during store visits. Depending on the visit template added, activities get automatically added to visits that are created using these templates, saving you time and effort. You can also add products and customers to an activity to quickly make the activity available to the products and the customers.

### [Visit](#)

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

### Substitution Management

With Substitution Management, you can maintain service continuity for customers in the absence of reps who handle the account. Define substitutes for sales reps for specific periods and for specific customers. The substitute performs key operations for the unavailable reps' customers.

### Daily Reports

Sales reps and supervisors can use daily reports to analyze, track, and monitor all field rep activities. Daily reports track the productive time spent on customer visits, research, and sales, and the downtime spent on breaks, vacation, and private appointments. Use daily reports to improve productivity by tracking the time spent on customer visits. Sales reps can use Visit Calendar to create and maintain daily and weekly visits, and update the daily reports for productive and downtime visits.

### User Tasks

To ensure that you don't miss either a to-do or personal action, create a user task record. You can create a task, view and filter a list of assigned tasks, and change the status of a task.

### Create a Customer Task

You can create a task for a customer only if you're either a supervisor in a customer team or a manager of a customer. Create tasks for a customer by using a customer task template that's assigned to the customer.

### Asset Management

Assets are items, such as refrigerators or freezers that you place at a retail store or customer location to increase your sales. As an asset's owner, you're responsible for the maintenance, repair, and other services required for the asset. Efficient management of assets can reduce customer complaints and, in turn, increase your brand value. By actively tracking your assets' conditions, you can budget better, reduce losses, and ensure employee safety.

### Sales Agreements

Sales agreements enable you to plan your sales and operations better. They can help make your business transaction, profits, and revenue margins more predictable.

### Salesforce Maps

With data in a map-based interface, you can visualize and track stores in your territories. Give your field reps the visit routes with minimum travel time and also ensure that the right stores are visited at the right time.

### Signatures

Admins can configure the signature flow for an object with relevant signatures from multiple roles using signature templates. For example, a signature flow that requires a signature from the store manager followed by the signature from the sales rep. Customize the signature flow for processes such as orders, contracts, and daily reports.

## 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.

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.

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## 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.

### 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 store is a place of business open to the public whose primary purpose is to sell retail goods or services onsite. This definition includes showrooms, kiosks, pop-ups, and other temporary locations. The store can be leased, owned, and operated by you or through an affiliate. Create retail store records for store locations. You can then create visits for the stores and assign them to field reps. All store-related visit and order records are available on the store's related list.

### Associate a Retail Store to Retail Store Groups

You can associate one retail store with multiple retail store groups. The store automatically inherits the key performance indicators (KPIs) from all the retail store groups. Also, you can associate one retail store group with multiple retail stores.

### 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.

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## Create a Location

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

1. From the App Launcher, find and open **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**.

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## 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.


1. From the App Launcher, find and open **Retail Store Groups**, and then click **New**.
2. Provide a name and a description to the store group.
3. Click **Save**.

## Create a Retail Store

A store is a place of business open to the public whose primary purpose is to sell retail goods or services onsite. This definition includes showrooms, kiosks, pop-ups, and other temporary locations. The store can be leased, owned, and operated by you or through an affiliate. Create retail store records for store locations. You can then create visits for the stores and assign them to field reps. All store-related visit and order records are available on the store's related list.

 **Note:** A store is a place of business open to the public whose primary purpose is to sell retail goods or services onsite. This definition includes showrooms, kiosks, pop-ups, and other temporary locations. The store can be leased, owned, and operated by you or through an affiliate.

1. From the App Launcher, find and open **Retail Stores**, and then click **New**.
2. Enter a name for the store.
3. (Optional) Create a location or search for an existing location.
4. Add the store address.

 **Note:** This address appears in the field rep's visit list. And the address gives the location coordinates on Salesforce Maps.

5. Create a location or search for an existing location.
6. Select one of these store types.
  - **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
7. Set a priority of high, medium, or low for a store to manage your operations and clientele better.
8. (Optional) Complete these 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 check. You can customize the picklist values based on your business requirements.

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- **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.

9. Select the account that the store is associated with.
10. Select a store group, which is required to create a [Retail Store KPI](#).
11. Select a primary store contact person.
12. Save your changes.

## Associate a Retail Store to Retail Store Groups

You can associate one retail store with multiple retail store groups. The store automatically inherits the key performance indicators (KPIs) from all the retail store groups. Also, you can associate one retail store group with multiple retail stores.

1. From a retail store or a retail store group record page, on the **Related** tab, under **Retail Store Group Assignments**, click **Add**.
2. Search for and add the required retail store or retail store group.
3. (Optional) Enter a priority order.  
Priority order determines which retail store group KPIs are applicable for a retail store.
4. Save your changes.

## 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.

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.

1. From the App Launcher, find and open **Retail Stores**, and then 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**.
5. Select the planogram associated to the in-store location, if any.

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6. Search 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. Save your changes.

## Assign a Vehicle to a Rep

Streamline store deliveries by creating vehicle-user assignments for reps. When a vehicle-user assignment is active, no other assignment involving that vehicle or user can be activated. Also, you can add product inventories for vehicles to let reps know the exact inventory. The information about the product inventories help reps meet ad hoc requests from a store.

### [Assign a Vehicle to a Delivery Rep](#)

Assign a vehicle to a delivery rep to create a vehicle-user assignment. A vehicle-user assignment helps you to eliminate assignment-related confusion and ensure smoother and faster deliveries to stores.

### [Change the Status of a Vehicle User Assignment](#)

When a delivery rep takes an assigned vehicle out for delivery, mark the assignment as Active. When the delivery rep returns the vehicle, mark the assignment as Complete. This way you can ensure that a delivery rep or vehicle has only one active assignment at any point in time.

### [Add Inventory to a Vehicle](#)

For an active vehicle-user assignment, delivery reps can see the inventory available in a vehicle if you've added inventory to it.

#### SEE ALSO:

- [Associate Delivery Task to Action Plan Template](#)
- [Associate Delivery Task to Shipments](#)

## Assign a Vehicle to a Delivery Rep

Assign a vehicle to a delivery rep to create a vehicle-user assignment. A vehicle-user assignment helps you to eliminate assignment-related confusion and ensure smoother and faster deliveries to stores.

1. From the App Launcher, find and select **Vehicle User Assignments**, and then click **New**.
2. Select a user or contact as a driver.
3. Select a vehicle.  
To create a new vehicle, click **New Location** and select Location Type as **Van**. Then, select **Mobile Location** and **Inventory Location**.
4. Enter a planned start date. And optionally, enter a planned end date..
5. Save your changes.

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## Change the Status of a Vehicle User Assignment

When a delivery rep takes an assigned vehicle out for delivery, mark the assignment as Active. When the delivery rep returns the vehicle, mark the assignment as Complete. This way you can ensure that a delivery rep or vehicle has only one active assignment at any point in time.

1. From the App Launcher, find and select **Vehicle User Assignments**.
2. To change the status of an assignment, click  next to the record, and then select **Activate** or **Mark Complete**.

 **Note:** When you activate an assignment, its status changes from assigned to in progress. When the delivery rep returns the vehicle, mark the assignment as complete. You can't change the status of a completed assignment.

## Add Inventory to a Vehicle

For an active vehicle-user assignment, delivery reps can see the inventory available in a vehicle if you've added inventory to it.

1. From the App Launcher, find *Product Items* and select **Product Items**, and then click **New**.
2. Select a product.
3. Select a **Location**.  
You can create a location, if necessary. To create a location that's a vehicle, click **New Location**, and select **Mobile Location** and **Inventory Location**, and select the **Location Type** as **Van**.
4. Enter the quantity that is available in the vehicle in **Quantity On Hand**.
5. (Optional) Select the unit of measure.
6. Save your changes.

## 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.

### [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.

### [Copy a Promotion](#)

Copy a promotion and modify it per your business needs, or reuse a successful promotion.

### [Delete a Promotion](#)

Delete a promotion for an account permanently with all references to products and tactics.

### EDITIONS

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### [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.

### 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.

#### EDITIONS

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## Create a Promotion

Create a promotion and associate it to promotion check tasks.

1. From the App Launcher, find and open **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**.

#### EDITIONS

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## Copy a Promotion

Copy a promotion and modify it per your business needs, or reuse a successful promotion.

Copy the promotion slogan, products, tactic, and tactic products from a promotion. The options (products and tactics) selected in the Copied Components section of the child promotion template are copied to the target promotion.

Copy promotions for the same customer or for a different customer under the same sales org. To create a copy for a different customer, change the customer in the Anchor Customer field.

1. From the App Launcher, select **Advanced Promotions**.
2. Select the promotion that you want to copy.
3. Click **Copy**.
4. Enter a slogan.
5. Select an in-store date.
6. Select the anchor customer.
7. Click **Save**.

 **Tip:** To create the promotion and modify its settings, click **Save & Edit**.

The new promotion is automatically assigned a unique name and is set to the planning phase.

SEE ALSO:


[Salesforce Help: Assign a Child Promotion Template to a Promotion Template](#)

## Delete a Promotion

Delete a promotion for an account permanently with all references to products and tactics.

You can't delete a promotion in these cases:

- The promotion phase is Committed or ForApproval and the RE\_Promotion\_Lock\_Status setting isn't added in Custom Settings. The Lock\_Deletion\_\_c field is automatically set to true and the promotion is locked for deletion.
- The current phase of the promotion is added in the Value field in the RE\_Promotion\_Lock\_Status setting. Then, the Lock\_Deletion\_\_c field is automatically set to true and the promotion is locked for deletion.
- The promotion is locked (Lock\_Deletion\_\_c is true) irrespective of the phase of the promotion or values configured in the RE\_Promotion\_Lock\_Status setting.
- The promotion has active associations such as order items or activities. A warning message is shown when you try to delete a promotion that has associations.

 **Note:** To exempt the deletion of promotions in specific phases, set the promotion lock status by using Custom Settings.

1. From the App Launcher, find and select **Advanced Promotions**.
2. Select the promotion that you want to delete.
3. Click **Delete**.

### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions with the Consumer Goods Cloud

### USER PERMISSIONS

To copy a promotion:

- CGCloud KAM OR CGCloud Sales Support

### EDITIONS

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### USER PERMISSIONS

To delete a promotion:

- CGCloud KAM OR CGCloud Sales Support

 **Note:** A promotion after deletion can't be recovered.

4. Click **Delete** to confirm.

SEE ALSO:

[Salesforce Help: Configure Promotion Lock Status](#)

[Salesforce Help: Add Promotion Lock Status](#)

## 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.

1. From the App Launcher, find and open the **Promotions** item.
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**.


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## 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.

1. From the App Launcher, find and open **Promotions**.
2. Select the required promotion.
3. Click **Add** in the **Promotion Channel** related list.
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 a promotion is applicable at a specific location. For example, place a banner near the payment counter to attract customers.
7. Save your changes.

 **Note:** If you've associated a promotion at the store level and another one at the store group level, both of the promotions are applicable to the store. To remove a promotion for a store, delete the association of the promotion from the relevant retail store KPI.

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## Planogram Set Up

Product placement plays a critical role in attracting consumer attention. Examine the planogram task details, add a reference image, and associate the planogram with an in-store location.

### [Add an Image](#)


Add an image representing the expected shelf display for a planogram check task.

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

Associate an image with an in-store location to enable field reps to perform planogram check tasks for the in-store location.

## Add an Image

Add an image representing the expected shelf display for a planogram check task.

 **Note:** Image upload for a planogram task is optional.

1. From the App Launcher, find and select **Images**, and then click **New**.
2. Enter a name for the image.
3. Enter the URL of the location where the image is available or select the image file.
4. Select the image category.
5. In Image Type, select **None**.
6. To make the image available to sales reps, select **Active**.
7. Save your changes.

## Associate a Planogram Image With an In-Store Location

Associate an image with an in-store location to enable field reps to perform planogram check tasks for the in-store location.

1. From the App Launcher, find and select **Retail Stores**.
2. Select the store.
3. On the Related tab of the store, select the in-store location and planogram.
4. Save your changes.

## Surveys

Create engaging, easy-to-use surveys with a simple editor to collect feedback and information from your users or customers. You can select different types of questions to gather the data that suits your needs. After you add a question, specify the responses that participants can choose.

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### [Create Survey Invitation](#)

Create a survey invitation for the visit if the action plan template that you associated with the visit has a survey task.

SEE ALSO:

[Salesforce Help: Salesforce Feedback Management](#)

## Create Survey Invitation

Create a survey invitation for the visit if the action plan template that you associated with the visit has a survey task.

1. In the App Launcher, find and select **Contacts**.
2. Click a contact.
3. From the drop down list on the top right, select **Get Survey Invitations**.
4. Select a survey
5. In the **Related Record** field, select **Visit** from the drop down list, then find and select a visit.
6. Click **Get Invitation**.

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## Assessment Indicator Definition

Store performance can be measured by a set of parameters. These parameters are called the Assessment Indicator Definitions. For example, the count of a product on a shelf, or product facings on a shelf.

### [Create an Assessment Indicator Definition](#)

Define Assessment Indicator Definitions to define the parameters to measure a store performance. For example, the count of a product on a shelf, or product facings on a shelf.

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## Create an Assessment Indicator Definition

Define Assessment Indicator Definitions to define the parameters to measure a store performance. For example, the count of a product on a shelf, or product facings on a shelf.

1. From the App Launcher, find and open **Assessment Indicator Definitions**, and then click **New**.
2. Enter the name and description for the indicator.
3. Select an indicator field type.  
The available options are Number, Boolean, Date Time, Text, or Decimal. Percentage field type isn't supported.
4. Click **Save**.

### EDITIONS

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

## Retail Store KPI

In Retail Store KPIs, you can define the assessment indicator definition that must be captured for a store group. Because the assessment indicator definition is associated with assessment task definition and store groups to stores, Retail Store KPIs are the link between a store and the tasks to be performed at a store. You can also define the expected values of an assessment indicator definition in Retail Store KPIs.

### [Create a Retail Store KPI](#)

Create Retail Store KPIs (RSKPIs) to define targets for assessment indicator definitions. Also, associate an assessment indicator definition to a store group and to a product, a promotion, a planogram, or a custom object.

## Create a Retail Store KPI

Create Retail Store KPIs (RSKPIs) to define targets for assessment indicator definitions. Also, associate an assessment indicator definition to a store group and to a product, a promotion, a planogram, or a custom object.

Considerations while creating a Retail Store KPI:

- One Assessment Task Definition can be associated with multiple Assessment Indicator Definitions. For an Assessment Indicator Definition, there can be one or more Retail Store KPIs.
- There's no restriction on which Assessment Indicator Definitions can be associated with an Assessment Task Definition.
- If you have two Retail Store KPIs with the same Assessment Indicator Definition, product, retail store group and KPI Type and use them for a visit against the same retail store. One of the Retail Store KPI is treated duplicate and only one Retail Visit KPI is generated.
- If you have two Retail Store KPIs with the same Assessment Indicator Definition, product, and retail store group but different KPI Type. In that case, one Retail Visit KPI for each of the Retail Store KPIs is generated. Even a blank KPI Type is treated as a unique combination.
- If a Retail Store is a part of two Retail Store Groups and a Retail Store KPI is associated with each Retail Store Group. Based on the priority associated with store assignment to the Retail Store Group, the Retail Store KPI associated with the Retail Store Group of higher priority is considered.
- KPI type is a pick list in RSKPI and is used in planogram Check.

1. From the App Launcher, find and open **Retail Store KPIs**, and then click **New**.
2. Select these options.

#### Option

**Retail Store Group**

**In-Store Location Category**

**Product**

#### Description

Required because KPIs can't be defined at a store level.

Required if all in-store locations across the store group in this category must inherit the KPI.

Required if you have inventory check tasks for the store group.

3. Select the assessment indicator definition that you're defining the targets for.

### EDITIONS

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


### EDITIONS

Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create a retail store KPI:

- CGCloud Supervisor
- OR
- CGCloud Sales Support
- OR
- CGCloud KAM


 **Note:** If you plan to associate more than one inventory check, planogram check, or promotion check tasks in one action plan template, ensure that while defining the Retail Store KPI for the same task type, you assign different assessment indicator definitions. If two tasks of the same type have the same assessment indicator, and are assigned to the same action plan template, duplicate Retail Visit KPI records are generated.

4. Select the unit of measure for capturing actual values against the assessment indicator definition targets.
5. Select a KPI type for defining the business type of the assessment indicator definition:
  - Facing
  - Share of Shelf
  - Out of Stock
  - Inventory
  - Price
  - Revenue

KPI Type is also used to determine key performance metrics such as Avg Facing Compliance, Avg Out-of-Stock Compliance, or Avg Price Compliance. See [Calculate Key Performance Indicators](#) for more information on the key performance metrics.

 **Note:** There's no correlation between the Task type of Assessment Task Definition Task and KPI Type of Retail Store KPI.

6. Enter the dates for these fields.
  - Effective From: The date that the target's validity begins.
  - Effective To: The date that the validity of the target ends.
7. To associate KPI information for a product category, select the product category.
8. Depending on the check task, select a planogram or a promotion.
9. For a custom task, select an object in Custom Context, and then select a record for the object.

 **Note:** You can select any standard or custom object to create a custom task if the task's HasActivities attribute is enabled. To identify an object with the HasActivities attribute enabled, check if the object is listed as related to the Task object.

10. Define the target value for the assessment indicator.

If you have an active sales agreement, targets are automatically filled. Otherwise, you can enter the targets in number, boolean, date time, decimal, and text formats.

11. Select the data types for these KPIs:
  - Share of Shelf: Decimal
  - Facing: Number
  - Out of Stock: Boolean

12. Save your changes.

## Assessment Task Definition

While on a store visit, field reps perform certain activities related to the different aspects of retail execution. You can define these activities as assessment task definitions. Assessment Task definition holds information such as name, description, category, and type of task.

### Types of Assessment Tasks Definitions

You can create several types of assessment tasks definitions to capture business data. Inventory check, Planogram check, In-store Survey, Promotion check, and Order Creation are provided in Consumer Goods. And, you can create a custom task for your specific business needs.

### Prerequisites for Creating an Assessment Task Definition

To enable your field reps to capture required data while performing, you must create and associate relevant records. For example, if you create an inventory check task but don't associate it with an in-store location, field reps wouldn't know where in the store the task must be performed.

### Create an Assessment Task Definition

Save the common activities that a field rep performs at a store as an assessment task definition.

### Associate an Assessment Task Definition to an Assessment Indicator Definition

You can add an assessment task definition in an action plan template after the assessment task definition is associated with an assessment indicator definition.

### EDITIONS

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

## Types of Assessment Tasks Definitions

You can create several types of assessment tasks definitions to capture business data. Inventory check, Planogram check, In-store Survey, Promotion check, and Order Creation are provided in Consumer Goods. And, you can create a custom task for your specific business needs.

### Inventory Check

Use this task type to track products or product categories in a store. Field reps can check and update information about product or product category 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 or product category available at that location.

Inventory check tasks capture inventory available, product share of shelf, its facings, and if a product is out of stock 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 the agreed upon terms, or if the store is prepared for upcoming promotions.

A promotion can be related 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, share of shelf, and availability of a product.

Field reps can click and upload an image of the in-store location. Field reps can manually capture the quantity and the number of facings of a product at an in-store location.

### Order Creation

### EDITIONS

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

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 reorder a previous order, they can change the quantity of the products 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

To use this task type enable 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 or specific visit ID 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.

You can add multiple custom tasks to a visit.

## Prerequisites for Creating an Assessment Task Definition

To enable your field reps to capture required data while performing, you must create and associate relevant records. For example, if you create an inventory check task but don't associate it with an in-store location, field reps wouldn't know where in the store the task must be performed.

#### [Prerequisites for Creating an Inventory Check](#)

Before you create an inventory check task type, you must create and associate these records.

#### [Prerequisites for Creating a Planogram Check](#)

Before you create an planogram check task type, you must create and associate these records.

#### [Prerequisites for Creating a Promotion Check](#)

Before you create a promotion check task type, you must create and associate these records.

#### [Prerequisites for Creating a Custom Task](#)

Before you create an other task type, you must create and associate these records.

### EDITIONS

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

## Prerequisites for Creating an Inventory Check

Before you create an inventory check task type, you must create and associate these records.

- Associate these records to a Retail Store:
  - Products.
  - In-Store Locations: While associating an In-Store Location with a Retail Store, ensure to associate every In-Store Location with an In-Store Location Category.
- Associate the Retail Store to a Retail Store Group.
- Define these records while creating a Retail Store KPI:
  - Retail Store Group: Select the Retail Store Group that you associated with the Retail Store.
  - In-Store Location Category: Select the In-Store Location Category that you used to create In-Store Locations. The In-Store Location Category sets up the link between an In-Store Location of a Retail Store and the Retail Store KPI.
  - Assessment Indicator Definition for Product or Product Category at the same In-Store Location Category.

### EDITIONS

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

## Prerequisites for Creating a Planogram Check

Before you create an planogram check task type, you must create and associate these records.

- Create an Image record in the Image object representing the planogram at a store.
- Associate these to a Retail Store:
  - Products.
  - In-Store Locations: Associate every in-store location with an In-Store Location Category.
  - Association the Product to the In-Store Location
  - Associate the Image to the In-Store Location
- Associate the Retail Store to a Retail Store Group.
- Define these while creating a Retail Store KPI:
  - Retail Store Group: Select the Retail Store Group that you have associated with the Retail Store.
  - In-Store Location Category: Select the In-Store Location Category to which the Image is associated. The In-Store Location Category sets up the link between an In-Store Location of a Retail Store and the Retail Store KPI.
  - Assessment Indicator Definition for Product or Product Category at the same In-Store Location Category.
  - Planogram: Select the Image record.
  - KPI Type: Depends on the Assessment Indicator Definition.
    - For product facing or empty shelves related Assessment Indicator Definitions, select **Facings**.
    - For share of shelf related Assessment Indicator Definitions, select **Share of Shelf**.
    - For availability of stock related Assessment Indicator Definitions, select **Out of Stock**.

### EDITIONS

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

## Prerequisites for Creating a Promotion Check

Before you create a promotion check task type, you must create and associate these records.

- Create a Promotion.
- (Optional) Associate the following to a Retail Store:
  - Products.
  - In-Store Locations: Associate every in-store location with an In-Store Location Category.
- (Optional) Add a promotion channel.
- Associate the Retail Store to a Retail Store Group.
- Define the following while creating a Retail Store KPI:
  - Retail Store Group: Select the Retail Store Group that you've associated with the Retail Store.
  - In-Store Location Category: Select the In-Store Location Category that you used to create In-Store Locations. The In-Store Location Category sets up the link between an In-Store Location of a Retail Store and the Retail Store KPI.
  - Assessment Indicator Definition for Product or Product Category at the same In-Store Location Category.

### EDITIONS

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

## Prerequisites for Creating a Custom Task

Before you create an other task type, you must create and associate these records.

- Associate these to a Retail Store:
  - Products.
  - In-Store Locations: Associate every in-store location with an In-Store Location Category.
- Associate the Retail Store to a Retail Store Group.
- Define these while creating a Retail Store KPI:
  - Retail Store Group: Select the Retail Store Group that you have associated with the Retail Store.
  - In-Store Location Category: Select the In-Store Location Category that you used to create In-Store Locations. The In-Store Location Category sets up the link between an In-Store Location of a Retail Store and the Retail Store KPI.
  - Assessment Indicator Definition for Product or Product Category at the same In-Store Location Category.
  - Custom Context: Select the Custom object.

### EDITIONS

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

## Create an Assessment Task Definition

Save the common activities that a field rep performs at a store as an assessment task definition.

1. In the App Launcher, under All Items, click **Assessment Task Definitions** and then click **New**.
2. Enter the name and description for the task definition.
3. Select an assessment task definition task type.
 

You can choose from Inventory Check, Planogram Check, Promotion Check, In-Store Survey, and Place Order.
4. Click **Save**.

### EDITIONS

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

## Associate an Assessment Task Definition to an Assessment Indicator Definition

You can add an assessment task definition in an action plan template after the assessment task definition is associated with an assessment indicator definition.

1. From the App Launcher, find and open **Assessment Task Definition**.
2. Select the assessment task definition.
3. On the Related tab, under Assessment Indicator Definition, click **Add**.
4. Select an assessment indicator definition.

The assessment indicator definitions that you associate define the type of data that a field rep must capture while performing this task. For example, for an assessment definition task with **Inventory Check** as an assessment indicator definition task type, select an assessment indicator definition that has **Number** as an indicator field type.

5. Enter **Display Order** value.

The display order is the sequence to perform tasks in a visit. Each task gets a positive and unique value. When the action plan template is added to a visit, field reps assigned to the visit can see the tasks sequenced according to the display order. If the display order value isn't entered, the tasks are sorted in alphabetical order. But if the display order is entered for only a few tasks, then the tasks

### EDITIONS

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

with undefined display order are sorted in alphabetical order and appear at the top of the task list, followed by the defined tasks. If field reps create tasks while on a visit, then the newly created tasks are displayed at the end of the task list.

6. Save your changes.

## 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.

### [Create an Action Plan Template](#)

You can create one action plan template and associate it to multiple visits.

### [Add Tasks and Flows to Action Plan Template](#)

Add the list of activities that are performed together in a store to an action plan template. You can add both tasks and flows to one action plan template.

### [Publish a Template](#)

You need to publish a template before you can use it to create visits. Ensure that you've added the required tasks and flows before you publish a template as you can't edit a published template.

#### EDITIONS

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

## Create an Action Plan Template

You can create one action plan template and associate it to multiple visits.

1. From the App Launcher, find and open **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 **Assessment Execution**.
5. Click **Save**.

#### EDITIONS

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

## Add Tasks and Flows to Action Plan Template

Add the list of activities that are performed together in a store to an action plan template. You can add both tasks and flows to one action plan template.

### [Associate an Assessment Task Definition to an Action Plan Template](#)

Add tasks that are commonly done together in a single action plan template. When you use a template for a visit, all the tasks are associated to the visit.

### [Associate Delivery Task to Action Plan Template](#)

Add a delivery tasks in an action plan template. So when you use the action plan template for a visit, this task gets associated to the visit.

### [Associate Flow to Action Plan Template](#)

Your Salesforce Admin can create flows for activities that are specific to your business and not covered as a regular Consumer Goods task type. You can then add these flows in an action plan template and your field reps can perform these activities at a store.

### [Associate Signature Tasks to an Action Plan Template](#)

Add signature tasks to an action plan template so field reps can capture signatures during a visit.

#### EDITIONS

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



### [Add a Component Task to an Action Plan Template](#)

You can create tasks in an action plan template using Lightning Web Components. Field reps can execute tasks that are customized according to your business needs.


### [Associate Tasks to an Action Plan Template](#)

Add simple tasks, such as meet the store manager, that are commonly combined in a single action plan template. When you use the action plan template for a visit these tasks get associated with the visit.

## Associate an Assessment Task Definition to an Action Plan Template

Add tasks that are commonly done together in a single action plan template. When you use a template for a visit, all the tasks are associated to the visit.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template.
3. Click **Add Tasks**.
4. Select an assessment task definition.

 **Note:** In one action plan template, you can add multiple Inventory Check, Planogram Check, and Promotion Check tasks but only one Order Creation or In-Store Survey task.

5. Select **Is Required** if you want to make the task mandatory to perform.
6. Enter a value for **Display Order**.

The display order is the sequence to perform tasks in a visit. Each task gets a positive and unique value. When the action plan template is added to a visit, field reps assigned to the visit can see the tasks sequenced according to the display order. If the display order value isn't entered, the tasks are sorted in alphabetical order. But if the display order is entered for only a few tasks, then the tasks with undefined display order are sorted in alphabetical order and appear at the top of the task list, followed by the defined tasks. If field reps create tasks while on a visit, then the newly created tasks are displayed at the end of the task list.

7. Save your changes.

### EDITIONS

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

## Associate Delivery Task to Action Plan Template

Add a delivery tasks in an action plan template. So when you use the action plan template for a visit, this task gets associated to the visit.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template.
3. Click **New Delivery Tasks**.

 **Note:** You can create only one delivery task in an action plan template.

4. Enter a name for the task.
5. Select **Required** if you want to make the task mandatory to perform.
6. Save your changes.

### EDITIONS

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

### USER PERMISSIONS

To use delivery task

- Lightning Direct Store Delivery

## Associate Flow to Action Plan Template

Your Salesforce Admin can create flows for activities that are specific to your business and not covered as a regular Consumer Goods task type. You can then add these flows in an action plan template and your field reps can perform these activities at a store.


To add flows to action plan template, ensure that while creating flows the name of your input parameter must match one of these strings:

- No parameters
- Only visitId
- Only assessmentTaskId
- Both visitId and assessmentTaskId

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template.
3. Click **Add Flows**.
4. Select a task flow.
5. Select **Required** if you want to make the task mandatory to perform.
6. Click **Save**.

## Associate Signature Tasks to an Action Plan Template

Add signature tasks to an action plan template so field reps can capture signatures during a visit.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template.
3. Click **New Signature Task**.
4. Enter a name and description for the signature task.
5. (Optional) Enter a display order.
  -  **Note:** Display order is the order in which the task is displayed for a visit.
6. If you want to make the task mandatory, select **Required**.
7. Save your changes.

## Add a Component Task to an Action Plan Template

You can create tasks in an action plan template using Lightning Web Components. Field reps can execute tasks that are customized according to your business needs.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template and click **Add Component Task**.
3. Add the name and description of the tasks.
4. For Fully Qualified Name, select a component.
5. Select **Required** if the task is mandatory.
6. Save your changes.

### EDITIONS

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

### USER PERMISSIONS

To create flows

- Manage Flows

To use flows

- Run Flows

### EDITIONS

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

### EDITIONS

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

## Associate Tasks to an Action Plan Template

Add simple tasks, such as meet the store manager, that are commonly combined in a single action plan template. When you use the action plan template for a visit these tasks get associated with the visit.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template and click **Add Tasks**.
3. Add task details.
4. Select **Is Required** if a task is mandatory.
5. Save your changes.

## Publish a Template

You need to publish a template before you can use it to create visits. Ensure that you've added the required tasks and flows before you publish a template as you can't edit a published template.

1. From the App Launcher, find and open the **Action Plan Templates** item.
2. Select the required template.
3. Review the tasks that you've added to the template and click **Publish Template**.

## Get Task Recommendations

Sales managers plan and schedule tasks for visits. To maximize profits and deliver brand value, it's important to create the right tasks for a visit. Einstein Visit Task Recommendation helps you identify the tasks and the assessment indicator definitions that can be performed on a visit. With a single click, you can schedule tasks and assessment indicator definitions recommended by Einstein. Or, you can choose to review the list and schedule only the most important tasks and assessment indicator definitions.

### [Request a Task Recommendation](#)

Request task recommendations from a visit or visit recommendation record page. You can also request task recommendations when you're requesting a visit recommendation.

### [Understand Visit Task Recommendation](#)

The target object of a Visit Task recommendation can be an Assessment Task or an RVKPI. When you schedule an Assessment Task recommendation, a task is created. And when you schedule an RVKPI type recommendation, a KPI is created for an existing task. When you schedule Assessment Task recommendations and the related RVKPI recommendations, both tasks and their KPIs are created.

### [Schedule a Task Recommendation](#)

To add recommended tasks or assessment indicator definitions to a visit, schedule task recommendations. You can schedule recommendations all at once or individually.

### EDITIONS

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

### EDITIONS

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### EDITIONS

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

## Request a Task Recommendation

Request task recommendations from a visit or visit recommendation record page. You can also request task recommendations when you're requesting a visit recommendation.

1. From the App Launcher, select **AI Visit Recommendation Request** and click **New**.  
You can also request a recommendation from the **Visits** or the **AI Visit Recommendations** tab by clicking **Request Activity Recommendations**. For non-KPI based tasks such as **Place Orders**, you can request only one task recommendation.
2. Select a recommendation strategy flow.
3. Select the stores that you need recommendations for.

 **Note:** If you use a mobile device to request recommendations, all the stores are selected by default for recommendations. You can't change the selection, but you can change the list view selection.

4. Save your changes.  
A task recommendation request is created.

SEE ALSO:

[Request a Recommendation](#)

## Understand Visit Task Recommendation

The target object of a Visit Task recommendation can be an Assessment Task or an RVKPI. When you schedule an Assessment Task recommendation, a task is created. And when you schedule an RVKPI type recommendation, a KPI is created for an existing task. When you schedule Assessment Task recommendations and the related RVKPI recommendations, both tasks and their KPIs are created.

You can schedule a visit task recommendation from the AI Visit Task Recommendation object. Or you can schedule recommendations from the related list of these objects.

- AI Visit Recommendation
- AI Visit Task Recommendation Request
- Visit

The related list of AI Visit Recommendation and AI Visit Task Recommendation Request objects shows only the Assessment Task type recommendation if Parent ID is defined in the task recommendation flow. Otherwise, all recommendations are displayed.

The related list of AI Visit Recommendation and AI Visit Task Recommendation Request objects displays only the Assessment Task type recommendation. But while scheduling a recommendation from the Visits related list, you can schedule its related recommendations.

## Schedule a Task Recommendation

To add recommended tasks or assessment indicator definitions to a visit, schedule task recommendations. You can schedule recommendations all at once or individually.

1. From the App Launcher, find *AI Visit Task Recommendation* and select **AI Visit Task Recommendation**.  
Or select an AI Visit Recommendation, AI Visit Task Recommendation Request, or a Visit record.

### EDITIONS

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

### EDITIONS

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

### EDITIONS

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

- To schedule recommendations, select all the recommendations that you want to schedule and click **Schedule All**.

To schedule one recommendation at a time, click **Schedule** from the arrow icon for the recommendation.

- Select the stores that you need recommendations for.



**Note:** If you use a mobile device to request recommendations, all stores are selected by default. You can't change the selection, but you can change the list view.

- Save your changes.

## Team Supervisors' Roles & Responsibilities

Monitor and track the activities of your sales reps to achieve your team's sales objectives. Provide guidance to improve a rep's performance and ensure greater customer satisfaction. Plan the store visits of your sales reps, create store-related job lists, and assign activities to your sales reps.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### Plan and Manage Visits

Plan your own visits and create on-demand visits for your sales reps. To help improve a rep's performance, supervisors can accompany them on visits. By default, supervisors can create an on-demand visit for any sales rep. For supervisors to be able to create visits for their subordinates, administrators must enable role hierarchy for the supervisors. These resources can help you get started.

- [Manually Create Visits](#)
- [Create Visits Automatically](#)
- [Create Multiple Visits](#) on page 47
- [Supervisor Travel with Sales Rep](#)
- [Enable Role Hierarchy](#)

### Track Time Utilization of the Team

Use daily reports and time cards to review how sales reps use their productive and downtime hours, and track productivity. Assign, view, and approve or reject the reports from your sales reps. If reports have an incorrect approver, supervisors can assign the correct approver. See these resources.

- [Approve or Reject a Daily Report](#) on page 56
- [Reassign a Daily Report](#) on page 56

### Manage Substitutions

Ensure continuous service even when a sales rep isn't available. Create a substitute, and assign temporary access to the unavailable rep's data. See [Assign a Substitute to a Customer](#) on page 52.

### Collaborate with Team by Using Notifications, Tasks, and Customer Tasks

Send one-way communications to your sales reps by creating notifications. For example, you can notify your sales rep about the topics to discuss during the next team meeting. You can create tasks for your sales reps to assign non-customer related actions. For example, you can create a task for your sales rep to release the daily report for the last week. You can monitor tasks and release them as they're

closed. Sales reps can either review the customer tasks that their supervisor created or create customer tasks during visits. See these resources.

- [Create Customer Tasks](#) on page 166
- [Create User Tasks](#) on page 57
- [Create User Notifications](#) on page 59

## Activities

Activity is a list of questions or surveys that sales reps can answer during store visits. Depending on the visit template added, activities get automatically added to visits that are created using these templates, saving you time and effort. You can also add products and customers to an activity to quickly make the activity available to the products and the customers.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### Workflow to add question as an activity:

- Create a job template. Don't select Product Reference.
- Next, create a job definition template with a generic question, such as how many POS are in the store.
- Next, create an activity template. You can select Consider Customers or Consider Customer Sets to make the associated activity available to a group of customers.
- Finally, create an activity. If you selected Consider Customers or Consider Customer Sets in the activity template, add customers or customer sets from related lists.

### Workflow to add survey as an activity:

- Create a job template. Select **Product Reference**.
- Create a job definition template with a product-related question, such as expiration date of the product.
- Create an activity template. Select **Consider Products**.
- Create an activity and add products from the Product related list. The survey is applicable to the added products.

## View activities for a visit

To view activities for a visit, from the visit record page, click **View Questions** or **View Surveys**.

Based on the activity template, an activity can be either standard or event-driven. Standard activities are applicable to all visits. Event-driven activities are specific to products and stores and are valid for a specific period. If Standard Jobs is selected in an activity template, the activities created are standard activities. Otherwise, the activities are event-driven.

When you create a visit for a store using a visit template, all standard activities that are associated with the visit template are added to the visit. Also, if the management type of these activities is the same as the customer manager of the store, standard activities that are created using activity templates are associated with the visit.

When you create an event-driven activity, job lists are generated using a batch process. If you add a customer or a customer set to the activity, and if there are visits scheduled for the associated customers, then the job list is added to these visits. You can also use job lists to plan and to create future visits for these customers.

Watch this video to understand how to set up activities for store audits.

 [Watch a video](#)

If you aren't able to watch the view in full screen, open the video on a new tab: [🎥 Set Up Activities for Store Audits](#).

### [Create an Activity](#)

To automatically relate an activity to visits, create an activity and then add a visit template to the activity. Whenever a visit is created by using this visit template, the activity is automatically added to the visit. You can create two types of activities: standard and event-driven.

### [Add Customers to an Activity](#)

You can add a customer to an activity only if you select Consider Customer for the associated activity template. For event-driven activities, the job list generated from an activity is applicable to the customers that are added to the activity. For standard activities, questions and surveys are applicable to the customers added to the activity. You can exclude a customer for an activity by marking the customer as Excluded. The Activity Customers related list shows the customers who are added to an activity.

### [Add Customer Sets to an Activity](#)

To add an activity to multiple customers quickly, add the relevant customer set to the activity. You can add a customer set to an activity only if Consider Customer Set is selected in the associated activity template. The Activity Customer Set related list shows records that link activities and customer sets.

### [Add Products to an Activity](#)

You can add products to an activity only if the Consider Products option is selected for the associated activity template. When you create a visit using the visit template added in the activity, these products are added to the visit. And the surveys added in the activity template are added for these products. The Products related list on an activity record page shows the products that are added to an activity.

### [Job Lists](#)

Job lists are a group of questions and surveys that are associated with a product and are applicable for a period. For event-driven activities, job lists are created using a batch process. You can use job lists to plan and to create visits.

### [Point of Sale \(POS\)](#)

Point of sale (POS) or secondary displays aid in sale and promotion of new products, seasonal merchandise, or even popular products. Drive in-store product visibility and improve sales by recording POS in stores and conducting POS audits as part of field execution activities. POS is supported in store audit questions but not in product related surveys.

### [Field Sales Activity](#)

Field sales activity (FSA) contains several activities, and each activity contains job definition templates that a sales rep can ask during a visit.

### [Surveys](#)

Surveys are product-specific questions that are answered during visits. The Surveys page of the Consumer Goods offline mobile app shows the surveys associated with visits.

## Create an Activity

To automatically relate an activity to visits, create an activity and then add a visit template to the activity. Whenever a visit is created by using this visit template, the activity is automatically added to the visit. You can create two types of activities: standard and event-driven.

1. From the App Launcher, find and select **Activities**, and then click **New**.
2. Provide these details:

Field	Description
Identification	
Activity Name	Name of the activity.
Valid From/Valid Thru	Validity period of the activity. Value in the Valid Thru field is calculated only if Valid From + Duration is selected in an activity template. If the Valid From field is changed, then the value of the Valid Thru field is updated. You can also update the field manually.
Activity Template	Active activity templates that have the same sales org as the user's sales org. If the user isn't assigned to a sales org, values aren't shown. The templates are shown based on the sort value in ascending order. Records with the same sort value are sorted alphabetically, and records with empty sort value appear at the beginning of the list.
Description	Description of the activity.
Field Sales Activity	Holds the details of the field sales activity object. Field Sales Activity (FSA) covers a set of job definition lists. For example, Field Sales Activity for "Promotional Display" include these activities. <ul style="list-style-type: none"> <li>• Sell-In Display (Sales Rep)</li> <li>• Build Display (Merchandiser)</li> <li>• Check compliance of the display (Sales Rep)</li> </ul>
Active	Determines whether the activity is active.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create activities:

- CGCloud Supervisor
- OR
- CGCloud Sales Support



Field	Description
Promotion	<p>Promotional reference of the activity. An activity can exist without a promotional reference.</p> <p>You can select a promotion only after you select an activity template. You can select only sellable promotions. Ensure that the promotion and the activity have the same sales org.</p>
Visit Template	<p>Visit template assigned to the activity.</p> <ul style="list-style-type: none"> <li>For event-driven activities, job lists created from an activity appear in all the visits created using this template.</li> <li>For standard activities, jobs appear in all the visits created using this template.</li> </ul> <p>You can select a visit template only after you select an activity template. Ensure that the visit template and the activity have the same sales org. The templates appear according to the sort order of a visit template in ascending order. Templates with no sort order are shown at the end of the list.</p>
Sales Org	Sales org of the activity.
Approval State	<p>Indicates the approval state of the activity.</p> <ul style="list-style-type: none"> <li>Approved: Activity is created from a field sales activity.</li> <li>Not Relevant: Activity is standalone.</li> <li>Canceled: The field sales activity is canceled. The approval state of associated job definition templates is also set to Canceled.</li> </ul>
Owner	Shows details of the user who created the activity, which are auto populated and seen in the UI only after the activity is created.
Description	
Description Language 1/2/3/4	<p>Description of the activity in the languages configured for the sales org.</p> <p>When the activity is created from a field sales activity, this field is preset with the description from the field sales activity.</p>
Settings (The fields in this section are visible only in the Edit mode.)	
Consider Listing	<p>Indicates whether the listed products are considered for creating surveys.</p> <p>If this option is selected, products included in the assortment list of a customer are shown in the View Surveys tab of a visit.</p>

Field	Description
Consider History	<p>Indicates whether historical products are considered for creating surveys.</p> <p>If this option is selected, historical products are shown in the View Surveys tab of a visit. The account-specific list of historical products is shown on the tab.</p> <p>Products that are manually added to a survey are included in the list of historical products.</p>
Consider Products	<p>Indicates whether the listed products are considered for creating surveys.</p>
Default Management Type	<p>Default management type that's considered by the automatic activity-activation process for generating job lists.</p> <ul style="list-style-type: none"> <li>• Sales</li> <li>• Service</li> <li>• Consultant</li> </ul> <p>The default value is Sales. The process considers only the managers assigned to the customer.</p>
User Policy	<p>User policy followed by the automatic activity-activation process for determining Customer Managers to whom job lists are assigned. The options are:</p> <ul style="list-style-type: none"> <li>• All: The system creates job lists for all users assigned to the customer.</li> <li>• Only Main: The system creates a job list for the main manager of a customer. If multiple main managers exist, the system considers the manager who's assigned the manager role for the longest period.</li> <li>• First: If already assigned, the system creates a job list for the main manager. Otherwise, a job list is created for any manager assigned to the customer. If more than one manager exists, the system considers the manager who's assigned the manager role for the longest period.</li> </ul>
Score Settings (The fields in this section are visible only in the Activity View or Edit mode.)	
Consider Score	<p>Indicates whether an activity is score-relevant. The default value is No.</p>
Activity Score (100%)	<p>Activity score that's considered for activity-performance evaluation. If the Consider Score option is set to Yes, ensure that the activity score is greater than zero.</p>
Threshold Fulfilled > (%)	<p>Upper threshold limit for an activity score.</p>
Threshold Partially Fulfilled > (%)	<p>Lower threshold limit for an activity score.</p>

Field	Description
Activity Question Score	Sum of the score values for all questions in the activity. The value of the field is calculated automatically and is non-editable.

3. Save your changes.

### Create Conditional Questions

Create dynamic questions to save time and avoid confusion. A child question is shown only if the condition for a parent condition is fulfilled. For example, for the parent question, Number of POS in the store? if the field rep selects 1 as the answer, the child question that appears is, Is the POS working fine?

## Create Conditional Questions

Create dynamic questions to save time and avoid confusion. A child question is shown only if the condition for a parent condition is fulfilled. For example, for the parent question, Number of POS in the store? if the field rep selects 1 as the answer, the child question that appears is, Is the POS working fine?

Here are a few things to keep in mind when you create conditional questions:

- You can't mark a question record that contains a condition question as Save Presetting.
- If the selected job definition template is removed, then the precondition, the operator, and the answer are also removed.
- If the precondition is removed after defining the condition, then the answers and the operators are removed.
- If a condition is defined, then you can select an operator value. Otherwise, specify the operator value as None.
- If the sort number of a question is changed, then the condition is updated based on the new sort number.

1. From the App Launcher, find and select **Activities**.
2. Select an activity.
3. In the Questions related list, edit the question that you want to be the child question.

 **Note:** Ensure that the sorting value of the child question is greater than the sorting value of the parent question.

4. In the Condition Settings section, select a parent question, an operator, and the answers that field reps can choose to meet the condition.

During a visit, the parent question is shown in the questions list. If the answer entered by a rep matches the defined condition, then the child question is shown. The answers of the selected question are defined in the Data Type Options of the job definition template.

5. Save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create conditional questions:


- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

## Add Customers to an Activity

You can add a customer to an activity only if you select Consider Customer for the associated activity template. For event-driven activities, the job list generated from an activity is applicable to the customers that are added to the activity. For standard activities, questions and surveys are applicable to the customers added to the activity. You can exclude a customer for an activity by marking the customer as Excluded. The Activity Customers related list shows the customers who are added to an activity.

1. From the App Launcher, find and select **Activities**.
2. Select an activity.
3. In the Activity Customers related list, click **New**.
4. Select a customer.

The customer is added to the activity.

 **Note:** The sales org of an activity customer is populated based on the sales org of the activity. To add a customer to an activity, ensure that the sales org of a customer and activity is the same. You can't edit the Customer field after an activity customer is created.

5. If you want to temporarily exclude the customer from the activity, select **Excluded**.
6. Save your changes.

## Add Customer Sets to an Activity

To add an activity to multiple customers quickly, add the relevant customer set to the activity. You can add a customer set to an activity only if Consider Customer Set is selected in the associated activity template. The Activity Customer Set related list shows records that link activities and customer sets.

1. From the App Launcher, find and select **Activities**.
2. Select an activity.
3. In the Activity Customer Sets related list, click **New**.
4. Select a customer set.

Ensure that the sales org of a customer set and activity is the same. You can't assign a customer set twice to an activity.

5. Save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To add customer to activities:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To add customer sets to activities:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

## Add Products to an Activity

You can add products to an activity only if the Consider Products option is selected for the associated activity template. When you create a visit using the visit template added in the activity, these products are added to the visit. And the surveys added in the activity template are added for these products. The Products related list on an activity record page shows the products that are added to an activity.

1. From the App Launcher, find and select **Activities**.
2. Select an activity.
3. In the Products related list, click **New**.
4. Provide these details:

Field	Description
Identification	
Activity Product Name	Name of a record.
Activity	Name of an activity.
Product	Product related to an activity.
Product Number	Product number as defined in the product master data. This field is auto-populated, and is shown only on the Activity Product Detail page.
Product Description	Description of a product as defined in the product master data. This field is auto-populated, and is shown only on the Activity Product Detail page.
Excluded	Indicates whether a product is temporarily excluded from an activity.
Manually	Indicates whether a product is manually added to an activity. For products that are added to activities through a field sales activity, the option is set to No.
Sales Org	Sales org of a product.

5. Save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To add products to activities:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

## Job Lists

Job lists are a group of questions and surveys that are associated with a product and are applicable for a period. For event-driven activities, job lists are created using a batch process. You can use job lists to plan and to create visits.

When you add a customer or a customer set to an activity, the job list created for the activity is applicable to all the customers.

The automatic activity-activation process updates job lists after every modification of an activity. The process considers the managers who have active management relation with the customer if the management validity period overlaps with the activity validity period. The consideration of managers depends on the setting of the Default Management Type and User Policy options in the relevant activity.

A new job list is added to visits if these conditions are met:

- The visit date falls within the validity period of the activity.
- The user assigned to a job list is the same as the user responsible for the visit.
- The visit template in the job list is the same as the visit template that's used for creating the visit.
- The customer assigned to a job list is the same as the customer for whom the visit is created.

The job lists that aren't added to any visit can be used by supervisors and sales reps for visit planning. Unlike standard activities where questions and surveys of an activity can be answered multiple times during the validity period of the activity, questions and surveys added in a job list can be answered only one time.

### Update Job Lists

After you create an event-driven activity, you can manually add the job list to scheduled visits. If no scheduled visits exist, you can use the job lists to plan and to create future visits.

### Demagnetize Job Lists

Demagnetization is the disassociation of a job list from a visit.

## Update Job Lists

After you create an event-driven activity, you can manually add the job list to scheduled visits. If no scheduled visits exist, you can use the job lists to plan and to create future visits.

1. From the App Launcher, find and select **Activities**, and then select an activity.
2. Click **Update Job List**.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To update job lists:

- CGCloud Supervisor
- OR
- CGCloud Sales Support

## Demagnetize Job Lists

Demagnetization is the disassociation of a job list from a visit.

A job list can be detached from a visit if:

- Any of the questions or surveys are unanswered during the visit.
- The visit is rescheduled and is no longer in the validity period of the job list.
- The job list gets reattached to the visit, and the visit is planned for the same customer, visit template, or user as the previous visit, and is a part of the existing visit magnetization process. If a visit date is moved within the validity period of a job list, then the job list is attached to the visit.
- Questions or surveys that are partially answered but still got detached during the visit appears as Unanswered during the visit magnetization process.


To detach a job list from a visit, select **Detach** in the Job Action Success field.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

## Point of Sale (POS)

Point of sale (POS) or secondary displays aid in sale and promotion of new products, seasonal merchandise, or even popular products. Drive in-store product visibility and improve sales by recording POS in stores and conducting POS audits as part of field execution activities. POS is supported in store audit questions but not in product related surveys.

 **Note:** The POS feature is available only with the enhanced Consumer Goods cloud data model.

POS are placements other than the regular retail display units such as refrigerators, freezers, and vending machines. In the Consumer Goods cloud, a POS record is linked to an account and stores information about all the POS items related to that account. Based on the one-to-many relation, a store or account can have multiple POS items assigned to it. Admins can create a POS template for various types of POS, including the typical ones such as:

- Cigarette Carrier
- Dairy Case
- Freezer
- Refrigerator
- Sales Counter
- Shelf
- Cigarette Sales Panel
- Vending Machine

By using a POS template that references any of these POS types, you can create multiple POS records for an account. For example, in the NTO 201 store, there are 3 types of cigarette carriers based on the number of cigarette cases it can hold, such as, 15, 20, and 25 cases of cigarettes respectively. To record and subsequently audit these 3 cigarette carriers as POS items, first create a POS template with the cigarette carrier type of POS. Then, by using this POS template, create a POS record for each of the mentioned quantities in the NTO 201 account.

You can create, update, delete, or discontinue a POS. A POS record typically has a validity time frame, which on expiration the POS item can be either discontinued or deleted. For example, discontinue a shelf type of POS containing seasonal products.

POS can be associated with assets. The hardware or high value assets within POS are tracked and managed through Asset Management.

### Create a POS

Itemize and track the POS set up in your store.

### Discontinue a POS

Discontinue a POS when it is no longer applicable or when its products expire. For example, POS for seasonal products, non-moving or obsolete products.

## Create a POS

Itemize and track the POS set up in your store.

1. From the App Launcher, find and go to **Accounts**.
2. Select an account.
3. On the Related tab of the account, in the POS section, click **New**.
4. Select a POS template.
5. In **Description**, enter a description of the POS in the languages configured for the sales org.
6. Select the date range for which the POS must be valid.
7. Save the changes.

POS items are added and maintained in the POS related list of the account record.

### USER PERMISSIONS

To create a POS record:

- Consumer Goods Cloud User

## Discontinue a POS

Discontinue a POS when it is no longer applicable or when its products expire. For example, POS for seasonal products, non-moving or obsolete products.

1. From the App Launcher, find and go to **Accounts**.
2. Select an account.
3. On the Related tab of the account, in the POS section, click **View** next to the POS record that you want to discontinue.
4. Click **Discontinue**.

If you discontinue a POS that has an expiry date in the future, the application automatically expires the POS. The Valid Thru date is updated to set the expiration of the POS to the date that it was discontinued.

### USER PERMISSIONS

To discontinue a POS:

- Consumer Goods Cloud User

## Field Sales Activity

Field sales activity (FSA) contains several activities, and each activity contains job definition templates that a sales rep can ask during a visit.

During the validity period of an FSA, tasks included in standard activities of the FSA appear in the visits that are created using the visit template assigned to the activity. For event-driven activities in an FSA, job lists are generated through a server process. These job lists appear in visits that are created using the visit template assigned to the activity.

Field sales activities include:

- Checking compliance on distribution, facings, and prices.
- Validating that promotions are set up correctly in stores.
- Checking POS-specific compliance.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled



- Monitoring selling activities.
- Conducting store audits.
- Conducting competitor surveys, such as competitor promotions, new products, and prices of competitor products.

The table shows the roles and responsibilities of users who can work with FSA.

Role	Responsibility
Sales Support	<ul style="list-style-type: none"> <li>• View field sales activities</li> <li>• Execute field sales activities</li> <li>• Conduct competitor surveys</li> </ul>
Supervisor	<ul style="list-style-type: none"> <li>• Create field sales activities for execution by different sales teams</li> <li>• Analyze competitor surveys for promotions</li> </ul>

### Create Field Sales Activity

To group similar activities that a sales rep can perform, create a field sales activity.

## Create Field Sales Activity

To group similar activities that a sales rep can perform, create a field sales activity.

1. From the App Launcher, find and select **Field Sales Activities**, and then click **New**.
2. Provide these details:

Field	Description
Identification	
Field Sales Activity Name	Name of a field sales activity.
Description	Description of a field sales activity.
Note	Note entered for a field sales activity.
Phase	<p>Phase of a field sales activity. The options are:</p> <ul style="list-style-type: none"> <li>• Planning</li> <li>• Committed</li> <li>• Canceled</li> </ul> <p>Activities related to any field sales activity in the Planning or Canceled field sales activity phase can't be activated.</p>
Valid From / Valid Thru	Validity period of a field sales activity.
Sales Org	Sales org of a field sales activity. You can edit this field only when you create the field.
Description	

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create field sales activities:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

Field	Description
Description Language 1/2/3/4	Description of a field sales activity in the language configured for the sales org.

### 3. Save your changes.

## Surveys

Surveys are product-specific questions that are answered during visits. The Surveys page of the Consumer Goods offline mobile app shows the surveys associated with visits.

Surveys included in an activity are shown if:

- The activity is active.
- The job definition templates of the activity are active.
- The job definition template of the activity isn't marked as Excluded.
- The visit template that's used for creating the visit is added in the activity.
- The start date and time of the visit is within the activity validity period.
- The Approval State of the activity is Approved or Not Relevant.
- The customer for whom the visit is created is related to the activity.

The surveys are grouped by source activity. The groups are sorted in alphabetical order of the activity source. The surveys are shown inside an activity based on sort order of the job definition template in ascending order. If the sort order isn't added for a job definition template, the related survey is shown in the beginning of the list. If two job definition templates have the same sort order, then the related surveys are shown in alphabetical order.

Surveys are shown for these products:

- Historical products, if the Consider History option is selected in the associated activity. The value set in the Historical Products option of the associated visit template decides if historical products are shown.
- Products that are added to an activity. If the Consider Listing option is selected in the associated activity, then the products that are part of the assortment list of the customer are included for surveys. The products are determined based on these criteria:
  - If the Consider Modules option isn't selected for customers, then all products assigned to the related product assortments are included in the survey.
  - If the Consider Modules option is selected for customers, then only the products that belong to product assortments with modules are included in the survey.

If multiple relevant product assortments exist for the selected customer, then the system lists products from all product assortments without duplicates. If the same product is considered in several product assortments, then:

- Based on the period of the product assortment product assignment, the system determines the validity of all products, and shows the product that has the maximum validity.
- If multiple products have the same validity period, then the system considers the valid from dates of all the products and selects the oldest product.
- If multiple products have the same Valid From and Valid Thru dates, then the system randomly selects a product.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### Filter Visit Survey Products

To view specific products from the complete list of products for which surveys are conducted, filter the product list. The filters are optional and collapsible, and are available for all visits.

### Manually Add Products to a Survey

You can manually add products for which surveys are to be conducted during a visit.

## Filter Visit Survey Products

To view specific products from the complete list of products for which surveys are conducted, filter the product list. The filters are optional and collapsible, and are available for all visits.

To filter products added to a visit, use these fields:

- **Description1:** To view products based on the entered description.
- **Activity Source:** To view the list of questions from an activity.
- **Distribution:** To view the products that are distributed, not distributed, or out of stock. Along with the products relevant to the selected value in the distribution list, products that are relevant to the call are shown.
- **Product Code:** To view product based on unique numeric code of a product.
- **Promotion:** To view the set of questions from an activity related to a promotion.
- **Facing Issue:** To view the products based on the answers related to facing questions.
- **GTIN (Global Trade Item Number):** To view product information in the database.
- **At least one question answered:** To view only those products that have answered questions. The associated questions are also shown.
- **Price Issue:** To view products based on the answers related to pricing questions.

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

## Manually Add Products to a Survey

You can manually add products for which surveys are to be conducted during a visit.

Here are the conditions for manually adding products to surveys:

- The Add Job Policy option is selected in the associated visit template.
- The status of the visit is either Planned or Unscheduled.
- One product is added only one time.
- The sales org of the product and the customer is the same.

You can add products that aren't included in the product assortments assigned to the customer.

If the added product is already included in the visit survey, then:

- The product is highlighted.
- The existing activities related to the product are retained.
- The activities that aren't part of the product initially are added.

When a visit is reopened, the manually added product is shown in the product list only if at least one survey is answered before the visit is saved.

1. From the App Launcher, find and select **Visits**, and then select a visit.
2. Click **View Surveys**.
3. Select a product, and then click **Add Surveys**.

The product is added. All surveys related to the visit through the relevant activity are available for the new product.

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To manually add products to a survey:

- Consumer Goods Cloud Supervisor, Consumer Goods Cloud Sales Rep

## Visit

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

### Visit Preparation

Plan your sales reps' store visits in detail to help improve their performance.

### Get Recommended Visits

Sales managers are responsible for planning and scheduling visits for stores in the territory they manage. To maximize profits and deliver brand value, it's important to schedule visits to the right stores at the right time. Einstein Recommended Visits employs rules and prediction insights to give a more focused visit recommendation. At a glance, you can identify stores not recently serviced. And with a single click, you can schedule visits to all the stores recommended by Einstein. You can choose to review the list and schedule only the most important visits.

### Create Visits

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

### Create Visits Using Salesforce Maps

You can also create visits using Salesforce Maps.

### Visits: Points to Consider

Points to consider when you create visits.

### EDITIONS

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

## Visit Preparation

Plan your sales reps' store visits in detail to help improve their performance.

To prepare for their visits, sales reps can use these features:

- **Configurable activity plans:** To maximize productivity, sales reps can customize and personalize activity plans for every campaign. With easy access to tasks, surveys, and promotion documents, sales reps can focus on the most pertinent activities at every store.
- **Route and visit optimization:** Sales reps can use GPS and Google maps on mobile devices for route optimization and visit planning. They can view, search, and filter store locations based on visit frequency, history, priority, or account classification.
- **Integrated map and stores view:** By using the integrated view of maps and stores, sales reps can optimize their route plans and plan their store visits better.

Sales reps can add events to their calendar directly from accounts and contacts. These appointments are then available on the Consumer Goods Cloud offline mobile app. When sales reps sync their device, they can view active promotions, activities to be performed, updated calendar information, and nearby stores.

### Calendar Planning

Depending on the market and different sales and service teams, you can use different visit planning approaches. The management team can fully drive the planning process based on the defined planning criteria or predefined trip list, but sales reps can also plan visits. With the option to plan visits, as a sales rep, you can adjust your visit schedule for a day or a week. Common planning options are planning with integrated trip lists or job lists, or creating unplanned visits to accommodate a plan or a customer.

### Visit Schedule Review

Sales reps can access and review their scheduled visits for a day from the user cockpit. The visit schedule shows all visits and other appointments that your supervisor or head-office planned and serves as a base for further planning.

### EDITIONS

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

### [On Demand Visit Creation](#)

Sales reps must be flexible to accommodate new visit requests either due to changes in the business scenario or to cater to a prioritized customer or urgent activities. To accommodate these requests, sales reps must set up on-demand visits.

### [Route and Traffic Information](#)

To help sales reps plan additional visits or change a visit sequence, maps provide them with the route for a day plotted on the map, including customer locations. With optimized routes and real-time traffic updates, sales reps can react to potential road works or traffic jams and avoid any delays in their schedule.

## Calendar Planning

Depending on the market and different sales and service teams, you can use different visit planning approaches. The management team can fully drive the planning process based on the defined planning criteria or predefined trip list, but sales reps can also plan visits. With the option to plan visits, as a sales rep, you can adjust your visit schedule for a day or a week. Common planning options are planning with integrated trip lists or job lists, or creating unplanned visits to accommodate a plan or a customer.

For a sales rep, calendar planning offers the flexibility to plan better. Apart from business appointments, you can also plan your personal commitments, such as a vacation or a doctors' appointment. You can provide better customer service and improve customer satisfaction because you can react flexibly and promptly to customer needs.

Sales reps and sales managers can plan visits. They can do these activities:

- Manage visits based on trip lists
- Plan visits based on predefined activities
- Create visits by using automatic visit planning
- Delete visits generated via automatic visits planning for themselves or for their subordinates. You can delete visits, except completed visits, if **Delete Allowed** is selected in the visit template..
- Create visits by using barcode scan
- Review all scheduled visits
- Review additional information such as address details and related activities of visits
- Identify different visit types and status of visits by using color codes or icons
- Filter options to focus only on remaining visits or on a complete plan

SEE ALSO:

[Automatic Visit Planning](#)

[Trip List-Based Visit Planning](#)

## Visit Schedule Review

Sales reps can access and review their scheduled visits for a day from the user cockpit. The visit schedule shows all visits and other appointments that your supervisor or head-office planned and serves as a base for further planning.

You can view these details in a visit schedule:

- Planned and future visits
- Location of stores by using maps

### EDITIONS

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

### EDITIONS

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

- Traffic density in the planned route
- Visit schedule and route for the entire day with an option to switch to either the previous or next day
- Visit schedule for the entire week in a calendar format
- Number of scheduled visits
- Visit types
- Additional visit information with activities

In addition to reviewing your visit schedule, you can verify whether you've any substitution visits or appointments. You can also check whether you've received any notifications that your supervisor sent, which can influence your current schedule.

## On Demand Visit Creation

Sales reps must be flexible to accommodate new visit requests either due to changes in the business scenario or to cater to a prioritized customer or urgent activities. To accommodate these requests, sales reps must set up on-demand visits.

Situations in which a sales rep must create an on-demand visit are:

- Unfinished or open calls from the previous day
- Incoming customer requests
- Unplanned substitutions
- Opening of a new store

You can create new visits either by using the user cockpit or from the Calendar. You can also add new visits in the current visit schedule by using map-based planning.

The roles and responsibilities of a user to create an on-demand visit are:

- Sales reps: They can create visits:
  - For nearby customers based on the location of the user
  - For substitution customers
  - Based on job lists
- Supervisors: They can create visits for sales reps.

## Route and Traffic Information

To help sales reps plan additional visits or change a visit sequence, maps provide them with the route for a day plotted on the map, including customer locations. With optimized routes and real-time traffic updates, sales reps can react to potential road works or traffic jams and avoid any delays in their schedule.

Route information includes these details:

- Sequence of visits in a list view
- Visit route in a map
- Customer name and address on the map
- Real-time traffic updates on the map
- Based on traffic, route suggestions between the current location and the customer's location
- Next customer location

### EDITIONS

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

### EDITIONS

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

## Get Recommended Visits

Sales managers are responsible for planning and scheduling visits for stores in the territory they manage. To maximize profits and deliver brand value, it's important to schedule visits to the right stores at the right time. Einstein Recommended Visits employs rules and prediction insights to give a more focused visit recommendation. At a glance, you can identify stores not recently serviced. And with a single click, you can schedule visits to all the stores recommended by Einstein. You can choose to review the list and schedule only the most important visits.

### [Request a Recommendation](#)

When you request a visit recommendation, a visit recommendation request gets created, You can see the recommended visits for the selected stores in the related list of the recommendation request.

### [Schedule Visits](#)

After you requested a recommendation, you can schedule visits as recommended or ignore the recommendations.

#### EDITIONS

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

## Request a Recommendation

When you request a visit recommendation, a visit recommendation request gets created, You can see the recommended visits for the selected stores in the related list of the recommendation request.


1. From the App Launcher, find and select **AI Visit Recommendation Request** and click **New**.

You can also request a recommendation from the Retail Store tab by clicking **New Recommendations** or you can clone an existing recommendation request.

2. Enter a description.
3. Enter a start and end date for the recommended visits.
4. Select the **Visit Site Type** as **Retail Store**.
5. Enter the number of recommendations you need per day.

 **Note:** The maximum you can enter is 100.

6. Select a recommendation strategy and click **Next**.
7. Select the stores that you want recommendations for.

 **Note:** If you use a mobile device to request recommendations, all the stores are selected by default for recommendations and you can't change the selection. And if you clone an existing recommendation request, the stores that are selected in the original request are selected by default. You can change the store selection and list view.

8. To request tasks recommendations for the requested visit recommendation take these steps.

- a. Turn on the **Get Activity Recommendations** toggle.
- b. Select a flow as the activity recommendation strategy.

 **Note:** To add flows as a strategy for task recommendations, ensure that while creating flows the name of your input parameter must match one of these strings:

- No parameters
- Only visitId
- Only assessmentTaskId
- Both visitId and assessmentTaskId

#### EDITIONS

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

9. Save your changes.

## Schedule Visits

After you requested a recommendation, you can schedule visits as recommended or ignore the recommendations.

1. From the App Launcher, find and select **AI Visit Recommendation**. Alternatively, select a AI Visit Recommendation Request record and got to the related list.
2. To schedule multiple visits, select the recommendations that you want to consider for creating visits and click **Schedule All**. To schedule one visit at a time, click **Schedule** from the arrow icon for the recommendation.

You can choose to ignore recommendations. Select the recommendations and click **Ignore All**.



**Note:** If you're using a mobile device to schedule visit, all the stores are selected by default and you can't change the selection.

3. To assign task to the visits, select an option on how to recommend tasks.

You can choose from:

- **No Tasks to Assign:** No tasks are assigned to the visits.
  - **Previous Visit Template:** A previous visit template indicates the action plan template that was used during the previous visit to the store that was completed. So, if you select **Previous Visit Template** to assign tasks, all tasks that were added in the previous visit template gets added to the visit.
  - **Store Template:** A store template is an action plan template that is associated with a store, it's retail store group, or it's account. So, if you select **Store Template** to assign tasks, all tasks from a store template gets assigned to the visit. If multiple action plan templates are associated with the store, then the template that's associated to the store directly and is valid, gets assigned. If there aren't any templates associated directly with the store, then the template associated with the retail store group and is valid, gets assigned. And if there aren't any templates associated with the store or the retail store group, then the template that is associated with the account and is valid, gets assigned.
4. Save your changes.  
The newly scheduled visits appear in the **Visits** tab.

### EDITIONS

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



## Create Visits

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

### Manually Create Visits

A visit can be customer-related or non-customer related. Supervisors can create calls for any sales reps in the team, but sales reps can create visits only for themselves.

### Create Visits Automatically

A planning algorithm creates visits based on visit settings. You can create and assign visits to any of your sales reps automatically if you're a manager.

### Create Visits by Using Job Lists

Create visits for customers who are specified in the job list.

### Create Visits by Using Trip Lists

You can plan visits in automatic mode according to a customer sequence in the trip list. Depending on the trip list customer setting, you can plan multiple visits for a customer during a day.

### Create Multiple Visits

You can create multiple visits for several customers and assign the visit to any sales rep from the team.

### Change the Visit Page Layout

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.

### Assessment Tasks

When you assign an action plan template to a visit, assessment tasks and retail visit KPIs are created. Assessment tasks are created based on the assessment task definitions in your action plan template and the retail visit KPIs are created based on retail store KPIs.

### Associate Delivery Task to Shipments

When you assign an action plan template to a visit, delivery tasks records are created. Associate this delivery task to shipments to define the products that're required to be delivered during the visit.

#### EDITIONS

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

## Manually Create Visits

A visit can be customer-related or non-customer related. Supervisors can create calls for any sales reps in the team, but sales reps can create visits only for themselves.

1. From the App Launcher, find and open **Visits**, and then click **New**.
2. Select **Retail Store** from the **Place** list. Then select the store for which you're creating the visit.
3. Set a visit priority.
4. Select the account to which the store belongs.
5. From the App Launcher, find and open **Calendar**. From the **Other Calendars** list, choose the field rep's calendar that you want to check for availability before assigning a visit.
6. Enter the start and end date and time. The actual time can vary based on the real-time activity of the field rep.

 **Note:** This field is mandatory to view the visits as events in Salesforce Calendar. Also, updating visit start and end time updates the event in Salesforce Calendar. But updating Salesforce Calendar doesn't update the visit start and end time.

7. Provide special instructions to the field rep, if any. You can include instructions to speak to the store manager or to rearrange products.

#### EDITIONS

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

8. Select **People** from the **Visitor** list. Then select the field rep who you want to assign for this visit.
9. Save your changes.

## Create Visits Automatically

A planning algorithm creates visits based on visit settings. You can create and assign visits to any of your sales reps automatically if you're a manager.

Depending on the customer visit settings, if the planned visit date is different from the actual date, then the system creates multiple visits during the week.

To avoid duplicates, the automatic visit planning process verifies whether an automatic visit is created for the same day, user, visit template, and customer before creating a visit. If a manually created visit exists for a user and you selected Check Overlap in the visit template, then the system selects the status of the new visit as **Unscheduled**.

1. From App Launcher, find and select **Visits**.
2. Click **Visit Planning**.
3. Select a sales org.
4. To specify the visit planning week, from the Automatically Call Planning Week calendar, select a date.
5. Click **Generate Visits**.

## Create Visits by Using Job Lists

Create visits for customers who are specified in the job list.

The system determines the time of visit by using these criteria:

- The time that you entered in the sales org user settings.
- If you didn't enter the time, the system considers the time that you entered in the individual user settings.
- If you didn't enter the time in the sales org user settings and individual user settings, then the system considers the time that you entered in the custom settings.

1. From App Launcher, find and select **Visits**.
2. Click **Job List Planning**.
3. Enter the customer name, city, user, and visit creation date details.
4. To search for open job lists, click **Search**.

The system shows the job lists whose status isn't **Not Done** and that aren't referenced to any visits.

5. Select a job list, and then click **Plan Visits with Job Lists**.

The system creates visits for the date that you selected to search for job lists, customers, and the visit template related to the job list. The system doesn't show the selected job lists in the Job List Display section anymore.

SEE ALSO:

[Job Lists](#)

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create visits automatically:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create visits by using job lists:

- Consumer Goods Cloud User

## Create Visits by Using Trip Lists

You can plan visits in automatic mode according to a customer sequence in the trip list. Depending on the trip list customer setting, you can plan multiple visits for a customer during a day.


The types of trip lists are:

- Daily Trip List: The system creates calls for a date according to the customers' sequence in the trip list.
  - Weekly Trip List: The system creates calls for a week according to the day of the week according to the customers' sequence in the trip list.
1. From the App Launcher, find and select **Visits**.
  2. Click **Trip List Planning**.
  3. Enter the trip list name, type, visit creation date, and sales org details.
  4. Click **Search**.
  5. From the list, select a trip list and then click **Generate Visits**.

## Create Multiple Visits

You can create multiple visits for several customers and assign the visit to any sales rep from the team.

The system determines the time of visit by using these criteria:

- The time that you entered in the sales org user settings.
  - If you didn't enter the time, the system considers the time that you entered in the individual user settings.
  - If you didn't enter the time in the sales org user settings and individual user settings, then the system considers the time that you entered in the custom settings.
1. From the App Launcher, find and select **Visits**.
  2. Click **Multiple New Visits**.
  3. Enter the Customer Name, User, City, Visit Creation Date, and Visit Template details.
    -  **Note:** The system shows the User field only for Supervisors. The list of users depends on the Role Hierarchy Configuration setting.

4. Click **Search**.  
The search result shows the list of customers for which the selected user is a manager.

5. Select two or more customers, and then click **Plan Visits with Selected Customers**.

The system creates calls for the selected customers and call template for the user and the entered call creation date. The system shows calls in the call calendar and call overview. The system selects the status of the calls as Planned.

The system creates visits with status as Planned.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create visits by using trip lists:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create multiple visits:

- Consumer Goods Cloud User

## Change the Visit Page Layout

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

1. From the App Launcher, find and open **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 **Professional, 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. From the App Launcher, find and open **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 **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled.

## Assessment Tasks

When you assign an action plan template to a visit, assessment tasks and retail visit KPIs are created. Assessment tasks are created based on the assessment task definitions in your action plan template and the retail visit KPIs are created based on retail store KPIs.

Retail visit KPIs are created if Consumer Goods cloud is activated in your org. Along with the Consumer Goods cloud, if the Financial Services, Health, or Public Sector cloud is activated, and the Partner Visit Management preference is enabled in any of these clouds, then retail visit KPIs aren't created.

The store product display order and the assessment task indicator definition display order decide the retail visit KPI sequence. The store product display order takes priority over the assessment task indicator definition display order. So, in retail visit KPI records, the store display order appears as the primary display order and the assessment task definition display order appears as the secondary display order. Thus, the store product display order decides the retail visit KPI sequence within a task. But if multiple assessment indicators are defined for a product, then all the retail visit KPIs have the same primary display order. Then, the assessment task indicator definition display order decides the retail visit KPI sequence. If a retail visit KPI doesn't have a display order, it appears at the bottom of the KPI list.

Based on the Assessment Definition Task Type, these Assessment Tasks are created.

- Planogram Check: If the following conditions are fulfilled, retail visit KPIs are created for a planogram check task.

### EDITIONS

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

- Retail Store KPI is available for Assessment Indicator Definition and Assessment Task Definition associations.
- In the Retail Store KPI, the Planogram field isn't empty.
- In-Store Location Category and Products mentioned in the Retail Store KPI match the In-Store location and Product association.
- Promotion Check: If the following conditions are fulfilled, retail visit KPIs are created for a promotion check task. Retail Visit KPIs are created irrespective of whether a promotion is associated with a retail store, retail store group, or an account.
  - Retail Store KPI is available for Assessment Indicator Definition and Assessment Task Definition associations.
  - In the Retail Store KPI, the Promotion field isn't empty.
- Custom Task: If the following conditions are fulfilled, retail visit KPIs are created for a custom task.
  - Retail Store KPI is available for Assessment Indicator Definition and Assessment Task Definition associations.
  - In the Retail Store KPI, the Custom Context field isn't empty.
- Inventory Check: If the following conditions are fulfilled, retail visit KPIs are created for an inventory check task.
  - Retail Store KPI is available for Assessment Indicator Definition and Assessment Task Definition associations.
  - In the Retail Store KPI, the Custom Context, Promotion, and Planogram field is empty.

## SEE ALSO:

[Prerequisites for Creating an Assessment Task Definition](#)

[Associate a Product with a Store](#)

[Associate an Assessment Task Definition to an Assessment Indicator Definition](#)


## Associate Delivery Task to Shipments

When you assign an action plan template to a visit, delivery tasks records are created. Associate this delivery task to shipments to define the products that're required to be delivered during the visit.

1. Click the delivery task from the Items list of Action Plan. Alternatively, from the App Launcher, find and open **Delivery Tasks** and select the delivery task record.
2. From the Shipments related list click **New**.
3. Create a new shipment and save your changes.

 **Note:** Ensure that **Actual Delivery Date** of the shipment is not filled.

4. To add products to the shipments, click the newly created shipment and from the Product Transfer related list, click **New**.
5. Add the product details and save your changes.

 **Important:** Ensure that you don't select **Received** while creating product transfers. If you mark a product as received, delivery drivers won't be able to complete the delivery.

## SEE ALSO:

[Salesforce Help: Track Inventory Shipments in Field Service](#)

[Salesforce Help: Product Request and Transfer Fields](#)

### EDITIONS

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

### USER PERMISSIONS

To use delivery task

- Lightning Direct Store Delivery

## Create Visits Using Salesforce Maps

You can also create visits using Salesforce Maps.

1. From the App Launcher, find and select **Maps**.
2. Click **Layers**, and then click **Stores**. Click **Schedule**, and select a field rep as a resource.
3. Change the date, if necessary.
4. Click **List**, and select the stores for which you want to schedule visits.
5. Select the option as **Add to Schedule**, and apply your changes.  
You see the rep's calendar and the selected stores.
6. Click **Add to Schedule**, and then save your changes.

## 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.

## Substitution Management

With Substitution Management, you can maintain service continuity for customers in the absence of reps who handle the account. Define substitutes for sales reps for specific periods and for specific customers. The substitute performs key operations for the unavailable reps' customers.

With Substitution Management you can:

- Create a substitution record that includes details such as the substitute for each account and the period of substitution.
- Give a substitute access to the unavailable rep's data a few days before, during, and a few days after the substitution period so that the substitute can manage their agenda. A substitute can access these records:
  - Visit Execution
  - Customers
  - Customer Tasks
  - Job Lists
  - Orders
  - Payments

You can:

### EDITIONS

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

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

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

- Assign one substitute for all the customers who are serviced by the unavailable rep.
- Assign multiple substitutes to one customer who's serviced by the unavailable rep. But ensure that the validity period for each substitute responsible for servicing the customer is different. For example, define a substitute for NTO Store for day 1 and another substitute for the same store for day 2.

When the substitution batch process runs, the substitutes are added to the account as customer manager, and they're added to the account team. Substitutes can view or access the account records only after they're added to the account team. In the Customer Manager related list of an account, you can see the substitutes for the account.

When you assign a substitute to a customer, ensure that:

- The substituted user is an active customer manager in the substitution period.
- The sales org for the customer and the substitution record is the same.

The table describes the roles and responsibilities of users who can work with substitution management.


Role	Responsibility
Sales Support	<ul style="list-style-type: none"> <li>• Create and edit substitutions</li> <li>• Review substitutions</li> <li>• Activate and deactivate substitutions</li> <li>• Add, remove, or review substitutions</li> </ul>
Supervisor	<ul style="list-style-type: none"> <li>• Define substitutes for a specific period</li> <li>• Create and edit substitutions</li> <li>• Review substitutions</li> <li>• Activate and deactivate substitutions</li> <li>• Add, remove, or review substitutions</li> </ul>

### [Assign a Substitute to a Customer](#)

When a sales rep is unavailable, create a substitution record to capture absence details, such as the name of the rep and the period of absence. You can assign the substitutes for the original rep to the customers. You can assign one substitute to one customer, multiple substitutes to one customer, or one substitute to multiple customers.

## Assign a Substitute to a Customer

When a sales rep is unavailable, create a substitution record to capture absence details, such as the name of the rep and the period of absence. You can assign the substitutes for the original rep to the customers. You can assign one substitute to one customer, multiple substitutes to one customer, or one substitute to multiple customers.

1. Capture the absence details of the sales rep who's unavailable.
  - a. From the App Launcher, find and select **Substitutions**, and then click **New**.
  - b. Type the name of the sales rep to be substituted.
  - c. Select the sales org that the substitution belongs to. You can edit this field only during the creation of the substitution.
  - d. Select the reason for the rep's absence, such as Vacation, Sickness, Training, or Other.
  - e. Select the validity period of the substitution.
  - f. Type the description of the substitution in the languages configured for the sales org.
  - g. Select the number of days before the start of the substitution period when the substitute can access the records related to the account that they're assigned as a substitute for. Ensure that the lead time is greater than or equal to zero.
  - h. Select the number of days after the end of the substitution period when the substitute can access the records related to the account that they're assigned as a substitute for. Ensure that the follow-up time is greater than or equal to zero.
  - i. Save your changes.
2. Assign a substitute to a customer.
  - a. In the Substitution Customers section, click **New Substitution Customer**.
  - b. Type the name of the customer that the substitution is created for.
  - c. Type the name of the substitute.
  - d. Select the validity period of the substitute.
  - e. Indicate whether the substitution customer is active.
  - f. Select the substitution who services the customer during the substitute validity period.
    -  **Note:** To assign more substitutes to the same customer, repeat these steps. Select the same customer, but a different substitute and validity period.
  - g. Save your changes.
3. Assign one substitute to multiple customers.
  - a. In the Substitution Customers section, click **Add Multiple Customers**.
  - b. Select a substitute.
  - c. Enter the validity period of the substitution customer.
  - d. Select the customers from the list.
  - e. Click **Add Substitution Customers**.
4. Activate the assignment.

### EDITIONS


Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To assign a substitute to a customer:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep




 **Note:** You can assign a substitution to a customer before you activate a substitution record, and then activate all the substitutions simultaneously. Or you can activate a substitution record, and then assign the substitution to customers and activate them one at a time.

5. Activate the Manager to Customer based on Substitution process.
  - a. From Settings, find and select **Process Builder**.
  - b. Select **Manager to Customer based on Substitution**.
  - c. Activate the process.

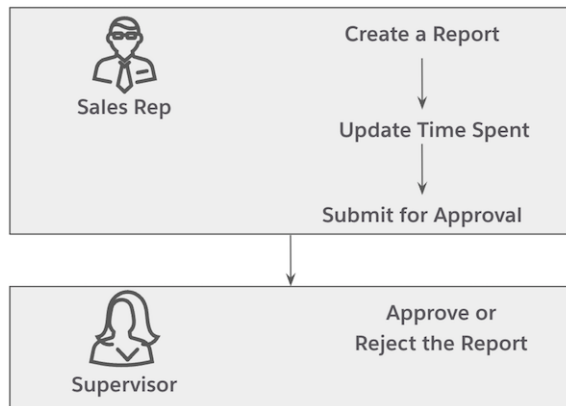
## Daily Reports

Sales reps and supervisors can use daily reports to analyze, track, and monitor all field rep activities. Daily reports track the productive time spent on customer visits, research, and sales, and the downtime spent on breaks, vacation, and private appointments. Use daily reports to improve productivity by tracking the time spent on customer visits. Sales reps can use Visit Calendar to create and maintain daily and weekly visits, and update the daily reports for productive and downtime visits.

 **Note:** You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app with the enhanced Consumer Goods data model (Spring '22 onwards).

Sales reps use the daily reports to enter their activities and the time spent on each activity. Reps must release a daily report before a supervisor can approve or reject the daily report.

This workflow defines the tasks for sales reps and supervisors.



These resources help you set up daily reports. To set up daily reports in the Consumer Goods Cloud offline mobile app, see [Create a Daily Report by Using Time Cards](#) on page 168.

1. [Create a Daily Report](#)  
Create daily reports to capture the time that you spent on performing various tasks during each day.
2. [Update Duration for Daily Report Activities](#)  
Based on the daily report template that's used, activities are shown for a daily report. As a sales rep, to create a report, enter the duration for each of these activities. The maximum duration for each activity and the duration for all the activities in a daily report can't be more than the maximum duration that's configured in the daily report template.

### EDITIONS

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

### 3. [Request Approval to Release a Daily Report](#)

In a typical daily report workflow, you must request for an approval before you can release a daily report. You can request approval for the reports whose status is Initial.

### 4. [Approve or Reject a Daily Report](#)

Supervisors can review their reps' daily reports whose status is Released, and can either approve or reject the reports.


### 5. [Reassign a Daily Report](#)

If a report is incorrectly assigned to a supervisor, the supervisor can reassign daily reports to a different approver.

## Create a Daily Report

Create daily reports to capture the time that you spent on performing various tasks during each day.

1. From the App Launcher, find and select **Daily Reports**, and then click **New**.
2. Select a template, enter a date, and then click **Create**.
3. Select a template and enter a date.
4. Provide these details.

Field	Description
Identification	
Daily Report Name	Name of a daily report.
Daily Report Template	Name of a daily report template.
Date	Date on which a daily report is created. The value of the field is populated based on the date that's selected in the calendar.
Work Time From	Time at which a field rep starts work on the selected date.
Work Time Thru	Time at which a field rep ends work on the selected date.   <b>Note:</b> Based on the time that's entered for the Work Time From and Work Time Thru fields, total working duration is calculated, and is shown in minutes for the daily report in the Total Working Duration (Min) field.
Status	
Accountable	Name of the person who's accountable for a daily report.
Responsible	Name of the person who's responsible for maintaining a daily report.

### EDITIONS

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

### USER PERMISSIONS

To create daily reports:

- Consumer Goods Cloud Sales User

Field	Description
Phase	Current phase of a daily report. The options in this list depend on the assigned workflow.
Annotation	
Annotation	Note or comment for a daily report.

### 5. Save your changes.

After you create a daily report, you can edit or delete the report. You can edit or delete only the daily reports that you created. You can edit the details for a Rejected daily report and only the Annotation for an Approved daily report. You can't delete a daily report whose phase is Released.

## Update Duration for Daily Report Activities

Based on the daily report template that's used, activities are shown for a daily report. As a sales rep, to create a report, enter the duration for each of these activities. The maximum duration for each activity and the duration for all the activities in a daily report can't be more than the maximum duration that's configured in the daily report template.

1. From the App Launcher, find and select **Daily Reports**, and then select a report.
2. In the Daily Report Activities related list, click **New**.
3. Select an activity.
4. Enter the number of hours and minutes for the activity, and then save your changes.

### EDITIONS

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

### USER PERMISSIONS

To review, edit, and delete daily report activities:

- Consumer Goods Cloud Sales User

## Request Approval to Release a Daily Report

In a typical daily report workflow, you must request for an approval before you can release a daily report. You can request approval for the reports whose status is Initial.

1. From the App Launcher, find and select **Daily Reports**, and then select a report whose phase is Initial.
2. Select an activity.
3. Click **Submit for Approval**.

### EDITIONS

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

### USER PERMISSIONS

To request approval for daily reports:

- Consumer Goods Cloud Sales User

## Approve or Reject a Daily Report

Supervisors can review their reps' daily reports whose status is Released, and can either approve or reject the reports.

1. From the App Launcher, find and select **Daily Reports**, and then select a report whose status is Released.
2. In the Approval History related list, for the reports whose status is Pending, click either **Approve**, or **Reject**.

If you approve a report, the report can't be further edited. If you reject a report, a sales rep can edit the report, and then resend the report for approval. If the workflow that's assigned to a daily report template requires no approval, then the report is auto-approved, and its state changes to Approved.

3. Enter any comments, if necessary.

## Reassign a Daily Report

If a report is incorrectly assigned to a supervisor, the supervisor can reassign daily reports to a different approver.

1. From the App Launcher, find and select **Daily Reports**, and then select a report whose status is Released.
2. In the Approval History related list, click the **Reassign** link in the Action column.
3. In the Approver field, select a different supervisor.
4. Enter comments, if necessary.
5. Click **Reassign Approval Request**.

## User Tasks

To ensure that you don't miss either a to-do or personal action, create a user task record. You can create a task, view and filter a list of assigned tasks, and change the status of a task.

You can filter a task list depending on your requirement. The filter options for user tasks are:

- Delegated Tasks
- Open Tasks
- Overdue Tasks
- Recently Completed Tasks
- Recently Viewed
- Recurring Tasks
- Today's Tasks
- Unscheduled Tasks

### EDITIONS

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

### USER PERMISSIONS

To approve or reject daily reports:

- Consumer Goods Cloud Supervisor

### EDITIONS

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

### USER PERMISSIONS

To reassign daily reports:

- Consumer Goods Cloud Supervisor

### EDITIONS

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

### Create User Tasks

For personal tasks and to-do lists that must be completed before a due date, create user task records. Supervisors can create user tasks, and then assign those tasks to their reps. Reps can create user tasks for themselves. A supervisor can monitor a rep's task and track its status.

### Create User Notifications

Create notifications to communicate important information to your reps. For example, topics to discuss during the next team meeting.

## Create User Tasks

For personal tasks and to-do lists that must be completed before a due date, create user task records. Supervisors can create user tasks, and then assign those tasks to their reps. Reps can create user tasks for themselves. A supervisor can monitor a rep's task and track its status.

You can add tasks if you've a user accountable record.

1. From the App Launcher, find and select **Tasks**, and then click **New Task**.
2. Select the **User Task** record type, and then click **Next**.
3. Provide these details.

Field	Description
Task Information	
Name	Name of a user task.
Assigned To	Individual to whom a task is assigned. By default, a task is assigned to the individual who creates it.
Type	Type of task. The options are: <ul style="list-style-type: none"> <li>• Inquiry</li> <li>• Complaint</li> <li>• Order</li> <li>• Placement</li> <li>• Service</li> <li>• Vehicle</li> <li>• Time Entry</li> <li>• Training</li> <li>• Company</li> <li>• Private</li> </ul>
Due Date	Date by when a task must be completed.

### EDITIONS

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

### USER PERMISSIONS

To create user tasks:

- Consumer Goods Cloud Sales User

Field	Description
Related To	Object to which a task is associated. This attribute is used only with the Consumer Goods Visit Execution app. To update this field, select an object, and then select a record. For example, select the Assets object, and then select the Refrigerator record.
Task Record Type	Record type of a task.
Subject	Subject of a user task. The options are: <ul style="list-style-type: none"> <li>• Call</li> <li>• Email</li> <li>• Send Letter</li> <li>• Send Quote</li> <li>• Other</li> </ul>
Accountable	User who's accountable for a task. By default, the field is populated with the logged-in user's name.
Priority	Priority of a task. The options are: <ul style="list-style-type: none"> <li>• High</li> <li>• Normal</li> <li>• Low</li> </ul>
Status	Status of a task. The options are: <ul style="list-style-type: none"> <li>• Not Started</li> <li>• In Progress</li> <li>• Completed</li> <li>• Waiting for someone else</li> <li>• Deferred</li> </ul>
Description Information	
Comments	User comments.

4. Save your changes.

## Create User Notifications

Create notifications to communicate important information to your reps. For example, topics to discuss during the next team meeting.

1. From the App Launcher, find and select **Tasks**, and then click **New Task**.
2. Select the **User Notification** record type, and then click **Next**.
3. Provide these details.

Field	Description
Task Information	
Task Record Type	Record type of a task.
Subject	Subject of a user notification. The options are: <ul style="list-style-type: none"> <li>• Call</li> <li>• Email</li> <li>• Send Letter</li> <li>• Send Quote</li> <li>• Other</li> </ul> You can also enter text.
Name	Name of a contact for whom the notification is applicable. The options are: <ul style="list-style-type: none"> <li>• Contacts</li> <li>• Leads</li> </ul>
Assigned To	Individual to whom a task is assigned. By default, a task is assigned to the individual who creates it.
Status	Status of a task. The options are: <ul style="list-style-type: none"> <li>• Not Started</li> <li>• In Progress</li> <li>• Completed</li> <li>• Waiting for someone else</li> <li>• Deferred</li> </ul>
Priority	Priority of a task. The options are: <ul style="list-style-type: none"> <li>• High</li> <li>• Normal</li> <li>• Low</li> </ul>
Due Date	Date by when a task must be completed.

### EDITIONS

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

### USER PERMISSIONS

To create user notifications:

- Consumer Goods Cloud Supervisor

Field	Description
Related To	Object to which a task is associated. This attribute is used only with the Consumer Goods Visit Execution app.  To update this field, select an object, and then select a record. For example, select the Assets object, and then select the Refrigerator record.
Description Information	
Comments	User comments.

4. Save your changes.

## Create a Customer Task

You can create a task for a customer only if you're either a supervisor in a customer team or a manager of a customer. Create tasks for a customer by using a customer task template that's assigned to the customer.

1. From the App Launcher, find and select **Customer Tasks**, and then click **New**.
2. Select a customer name.
3. Select a customer task template.
4. Enter a description, and then select a priority.
5. Click **Create**, and then provide these details.

Field	Description
Task Information	
Customer Task Name	Name of a customer task.
Customer Task Template	Customer task template that's used to create a customer task. Only the templates that belong to the same sales org as the customer and for which Supervisor or Sales Rep are added as a user role are shown.
Customer	Customer for whom a task is created.
Due Date	Due date of a customer task.
Phase	Phase of a customer task. The options are: <ul style="list-style-type: none"> <li>• Initial</li> <li>• Completed</li> <li>• Released</li> <li>• Canceled</li> </ul>

### EDITIONS

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

### USER PERMISSIONS

To create customer tasks:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep



Field	Description
Sales Org	Sales org of a customer task.
Responsible	Person responsible for creating a customer task.
Priority	Priority of a customer task.
Accountable	Person accountable for a customer task.
Classification	Classification of the customer task. The options are: <ul style="list-style-type: none"> <li>• Inquiry</li> <li>• Complaint</li> <li>• Order</li> <li>• Placement</li> <li>• Service</li> <li>• Vehicle</li> <li>• Time Entry</li> <li>• Training</li> <li>• Company</li> <li>• Private</li> </ul>
Asset	Asset that's tagged to a customer. Sales org of an asset and the customer must be the same.
Description	
Description Language 1/2/3/4	Description of a customer task in the languages that are configured for the sales org.
Notes	
Note	Short editable note that's related to a customer task.

## 6. Save your changes.

## Asset Management

Assets are items, such as refrigerators or freezers that you place at a retail store or customer location to increase your sales. As an asset's owner, you're responsible for the maintenance, repair, and other services required for the asset. Efficient management of assets can reduce customer complaints and, in turn, increase your brand value. By actively tracking your assets' conditions, you can budget better, reduce losses, and ensure employee safety.

An asset's serial number identifies the asset and is generated based on the asset template and asset type. An asset template defines the generic characteristics of an asset, and includes an asset type that contains the asset details. To manage different products, the admin creates asset templates and relates each template to a product while ensuring that the product type equals the asset type. For example, create an asset template such as Single Door Fridge, and then create asset type such as Single Door Fridge in Red.

### EDITIONS

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

To raise asset service requests, such as repair, maintenance, retirement, and replacement, a field service team can use the customer task template.

An asset is related to a sales org, and the sales org of an asset and the customer must be the same. You can also associate assets with an account and its related Point of Sales (POS). Here are the main differences between an asset and a POS.

Assets	POS
A valuable piece of equipment. Can be a display. Can contain sellable components. Can also be a standalone equipment, such as an umbrella or mobile dispensing equipment.	A less expensive piece of equipment. Can be used as displays or floor stands at the store for selling and branding products.
Generally require tracking and maintenance. For example, maintenance and repair control of assets.	Generally refers to secondary placements or displays, which are often used for promotions.

Tasks related to assets are created as customer tasks. Supervisors and reps can record their observations during task audit. As a sales rep and a supervisor, you can create, edit, deactivate, and review a list of assets that are assigned to a customer. You can manage assets in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

Let's understand the process in detail.

- **Create Asset Templates and Asset Types:** Before you create assets, ensure that admins have created asset templates and asset types. For more information, see [Create an Asset Template](#) and [Create an Asset Type](#).
- **Create Assets:** After the admin sets up master data, sales reps can create an asset assigned to a customer and relate the asset to an account for a valid period. To speed up the checkout process, you can also relate an asset to a relevant POS. To track the asset, place an order for an asset, and then store information about your customer's products. You can also relate an asset to a product. While products represent the items that your company sells, assets represent the specific products that your customers have purchased. Use assets to store information about your customers' products. For more information, see [Create an Asset](#).
- **Scan assets:** Identify your assets by setting up a bluetooth scanner. Sales reps can sight the customer asset manually, scan the asset barcode with the camera to sight the asset, or sight an unknown asset by scanning or by manually registering the serial number. Before you scan the asset barcode, see [Requirements for Using a Bluetooth Scanner](#).
- **Track and Audit Assets:** Supervisors and sales reps can audit assets and run asset-related surveys to document the asset's condition, location, and use. During a visit, reps can track assets to ensure that the assets are placed at the store and audit assets to record the observations about these assets. For more information, see [Audit an Asset](#).
- **Review customer tasks, notes, and attachments:** Sales reps can perform these asset-related tasks: Create customer requests for customer tasks, such as repair, installation requests, and de-allocation requests. Review customer tasks created by the supervisor and work on the asset. Add notes on the current situation of the asset. Review attachments, such as pictures and documents for each asset. Address customer complaints related to an asset. For more information, see [Address Customer Complaints about an Asset](#).

### [Create an Asset](#)

Create an asset record to define all the details about an asset, such as manufacturer and year of manufacturing. To identify an asset easily, add a serial number or tag. Associate an asset with an account and its related point of sale. Or, associate an asset to a product to enable a sales rep to place an order for the asset.

### [Address Customer Complaints about an Asset](#)

When a customer has problems or concerns with an asset, create a customer task for the asset. This task can be executed during a visit.

### [Audit an Asset](#)

Use the Asset Audit object to record your observations for an asset during its audit. Track assets to confirm that assets assigned to customers are placed at the customer location.

## Create an Asset

Create an asset record to define all the details about an asset, such as manufacturer and year of manufacturing. To identify an asset easily, add a serial number or tag. Associate an asset with an account and its related point of sale. Or, associate an asset to a product to enable a sales rep to place an order for the asset.

1. From the App Launcher, find and select **Assets**, and then click **New**.
2. Provide these details.

Field	Description
Identification	
Description	Description of the asset.
Asset Name	Name of the asset.
Tag Number	Unique tag number that's assigned to the asset.
Asset Type	Type of the asset. You can't edit this field after the asset is created.
Account	Customer to whom the asset is assigned. This field is available after you select an asset type.
Sales Org	Sales org to which the asset belongs.
Valid From/Valid Thru	Validity period of the asset.
Status	Status of the asset. The options are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Damaged</li> </ul>
Asset Template	Asset template on which the asset is based. This field is automatically populated based on the selected asset type.
POS	Point of sale that's assigned to the asset. You can select only the POS that's assigned to the selected customer.
Description	
Description Language 1/2/3/4	Description of the asset template in the languages that are configured for the sales org.
Settings	
Ownership Type	Ownership type of the asset. The options are: <ul style="list-style-type: none"> <li>• Owned</li> </ul>

### EDITIONS

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

### USER PERMISSIONS

To create an asset:

- Consumer Goods Cloud Supervisor, Consumer Goods Cloud Sales Rep

Field	Description
	<ul style="list-style-type: none"> <li>Leased</li> </ul>
Manufacturer Serial Number	Serial number that's assigned to the asset by its manufacturer.
Production Year	Year in which the asset was manufactured.
ERP Asset Number	ERP number of the asset.
Competitor Asset	Indicates whether the asset is a competitor asset. The options are: <ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
Brand	Brand to which the asset belongs.
Service Phone Number	Contact number of the brand.
Notes	
Asset Note	Any additional information about the asset.

### 3. Save your changes.

Alternatively, you can create an asset during a visit. To add an asset to a visit, from the Visit Record page, click **Register Asset**.

#### SEE ALSO:

[Salesforce Help: Supported Barcodes](#)

## Address Customer Complaints about an Asset

When a customer has problems or concerns with an asset, create a customer task for the asset. This task can be executed during a visit.

- From the App Launcher, find and select **Assets**.
- Select an asset.
- In the Customer Tasks related list, click **New**.
- Select the record type as **Customer Task Editable**, and then click **Next**.
- Enter the details for the customer task.
- Save your changes.

#### EDITIONS

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

#### USER PERMISSIONS

To assign a customer task to an asset:

- Consumer Goods Cloud Supervisor, Consumer Goods Cloud Sales Rep

## Audit an Asset

Use the Asset Audit object to record your observations for an asset during its audit. Track assets to confirm that assets assigned to customers are placed at the customer location.

If you identify an asset at a customer location that isn't assigned to the customer, you must track these assets. As a legal requirement, all assets must be correctly assigned to customers.

Create asset audits for an unregistered asset from the View Asset button during visits. The system tracks these unregistered assets using the tag number and automatically matches with an asset in the system.

- If an unregistered asset is identified by its tag number, then the asset audit is automatically assigned to the identified asset if it has the same sales org.
  - If an unregistered asset isn't identified by its tag number, then an asset audit is created as an unregistered asset audit, and must be manually addressed by a user.
1. From the App Launcher, find and select **Asset Audits**, and then click **New**.
  2. Provide these details:

### EDITIONS

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

### USER PERMISSIONS

To create asset audits:

- Consumer Goods Cloud Supervisor, Consumer Goods Cloud Sales Rep

Field	Description
Asset Information	
Customer	Customer to whom the asset is assigned.
User	Name of the user who performs the audit.
Asset	Asset that's audited.
Creation Date	Date on which the asset is audited.
Survey	
Sighted	Indicates whether the asset was found in the store. The options are: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
Condition	Condition of the asset. The options are: <ul style="list-style-type: none"> <li>• Working</li> <li>• Damaged</li> <li>• Destroyed</li> <li>• Technical Defect</li> </ul>
Location	Location at which the asset is placed. The options are: <ul style="list-style-type: none"> <li>• Cash Register</li> <li>• Foyer</li> <li>• Main Course</li> <li>• Bar</li> <li>• Open Air</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• See Note</li> </ul>
Location Rating	Rating for the location at which the asset is placed. The options are: <ul style="list-style-type: none"> <li>• Good</li> <li>• Could be better</li> <li>• Bad</li> </ul>
Usage	Specifies how the asset is used. The options are: <ul style="list-style-type: none"> <li>• Correct</li> <li>• Misapplication</li> <li>• Against agreement</li> </ul>
Note	Any other observations during the audit.

### 3. Save your changes.

Alternatively, you can create an asset audit record from a visit record page or from an asset record page. On a visit record page, click **Add Asset Audit**. On an asset record page, on the Asset Audits related list, click **New**.

## Sales Agreements

Sales agreements enable you to plan your sales and operations better. They can help make your business transaction, profits, and revenue margins more predictable.

Use sales agreements to:

- Get a consolidated view of all products in your sales agreement, along with their quantity and revenue metrics across past, current, and future schedules.
- Track unique performance indicators such as inventory and territory-based revenue.
- Automate actual quantity updates through orders and contracts.
- Recalculate the actuals for active sales agreements at any time to get real-time updates.
- Set assessment indicator definition targets automatically.
- Manage a single active version of a sales agreement through multiple revisions.
- Build long-term business relationships by renewing your sales agreements.
- Get notified whenever automatic or manual processes complete, along with details and suggested next actions.

### EDITIONS

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

## Salesforce Maps

With data in a map-based interface, you can visualize and track stores in your territories. Give your field reps the visit routes with minimum travel time and also ensure that the right stores are visited at the right time.


### Create Optimized Routes


You can use the Salesforce Maps Advanced Route Template to generate optimized routes for your field reps with just a few clicks. With constraints such as time period, number of visits, and store operating hours, you can ensure that reps visit the right stores at the right time.

## Create Optimized Routes

You can use the Salesforce Maps Advanced Route Template to generate optimized routes for your field reps with just a few clicks. With constraints such as time period, number of visits, and store operating hours, you can ensure that reps visit the right stores at the right time.

1. From the App Launcher, find and open **Salesforce Maps**.
2. Click the **Maps Advanced Route Template Builder** tab, and click **+ New Visit Plan**.
3. Enter a **Name** and **Description**.
4. Click **Save and Next**.
5. In the **Routing Object** section,
  - a. From the Maps Base Object Nickname list, select Retail Store
  - b. (Optional) Specify logic to filter specific objects. You can visit all objects or filter objects based on certain conditions.
  - c. Click **Save and Next**.
6. In the **Output** section,
  - a. Select **as Visit**. This creates a list of visits that are saved in your Salesforce database and assigned to the reps you designate later in the template.
 

 **Note:** Configure **Visits** as an object output in the **Maps Advanced Global Settings** before they are displayed in the template builder.
  - b. Enter **Promotional Windows**.
 

 **Note:** If **Promotional Windows** are configured in the **Global Settings**, you can include them in the template.
  - c. Enter buffer time.
 

This automatically calculates the length to your next destination (in traffic). You can also add an extra buffer between visits. The time between visits is the sum of the time in traffic and the buffer time between visits.
  - d. Enter **Max Segment Length**.
 

This sets the limit on the drive time between visits. Maximum segment time is a soft constraint. Locations that require drive time outside of the entered values can still be included in the route, if there is no other way to satisfy their associated frequency requirements.
  - e. Click **Save and Next**.
7. In the **Tooltips** section,

### EDITIONS

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

### EDITIONS

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

- a. Choose the information you want to see when you click a marker.
  - b. Click **Save and Next**.
8. In the **Define Visit Completion** section,
  - a. In the **Visit Object** field, select the object that indicates completion of a visit, for example, assessment task.  
This option defines how template builder interprets a completed visit. This **Visit Object** needs a lookup field to the **Routing Object**.
  - b. In the field, **Lookup Field to Visited Object**, specify the relation from the **Lookup Field** to the **Visited Object**.
  - c. In the **Visit Date** field, select a field on the **Visit Object**.
  - d. In the **Optional Advanced Filtering** section, you can specify certain field values to include when determining whether to mark the visit as completed.
  - e. Click **Save and Next**.
9. In the **Import Planned Visits** section,
  - a. Select the appropriate visit object to import the manually created visits
  - b. Click **Save and Next**.
10. In the **Assignment** section,
  - a. In the **Ownership** field, select the user to whom routes are assigned.
  - b. Click **Save and Next**.
11. (Optional) In the **Advanced Prioritization** section,
  - a. Prioritize records based on field values within the Salesforce org.
  - b. Click **Save and Next**.
12. In the **Route Duration** section,
  - a. Select a route type. You have three options to choose from:
    - **Visit Every Location Once**: Select this option to visit every Routing Object once.
    - **Hit Target Visit Frequency**: Select this option to visit every Routing Object a certain number of times during a time span.
    - **Days Between Visits**: Select this option to see a customer a certain number of days since their last visit
  - b. Select the date from which you want the routes to be planned.
  - c. Enter the duration of the visit plan. If you select **Repeats**, then enter the date until which the routing repeats.
  - d. In the **Auto Re-optimization** section, choose the day and time to reoptimize routes for the users.
  - e. Click **Save and Next**.
13. In the **Count Completed Visits** section,
  - a. Select if you want to start the visit plan in the middle of a performance period.
  - b. Click **Save and Next**.
14. In the **Confirm and Schedule** section, you can choose either of the two options:
  - **Send Email to User**: Select this button to activate the user and generate an email informing the user that they have been added to Advanced Maps.



- **Generate Routes:** Select this button to trigger a mass reoptimization for all users assigned to the template. You can use this if any changes are made to the template.

## Signatures

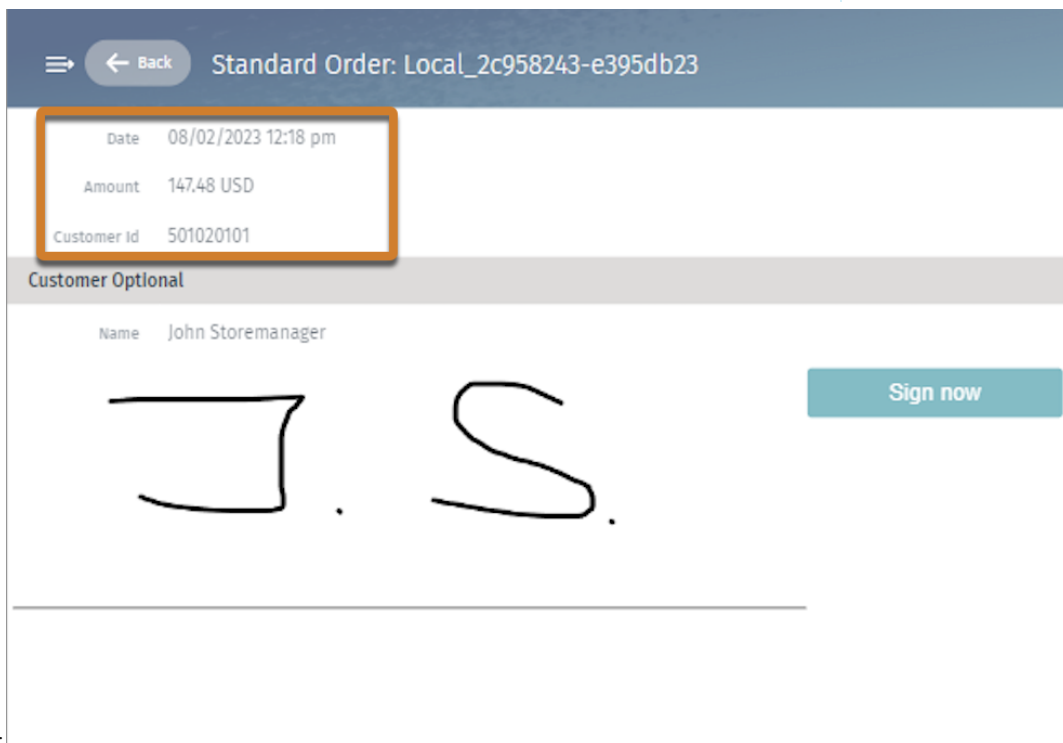
Admins can configure the signature flow for an object with relevant signatures from multiple roles using signature templates. For example, a signature flow that requires a signature from the store manager followed by the signature from the sales rep. Customize the signature flow for processes such as orders, contracts, and daily reports.

The Signature Handling page contains these sections:

- **Header Attributes:** Attributes that identify the user signature belonging to a process such as an order or a report. These attributes are shown while capturing or reviewing the signature. You can define the header attributes by using the Attribute Set in a signature

### EDITIONS

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



template.

- **User Signature:** The user's signature is shown along with the header attributes.

You can configure multiple signature steps, one for each signature. For each signature step, the system validates these items:

If	Value	Then
Signature Required	Yes	A signature for the corresponding signature step is mandatory.
Authentication	<ul style="list-style-type: none"> <li>• None</li> <li>• Name (optional)</li> <li>• Name (required)</li> </ul>	<ul style="list-style-type: none"> <li>• None: The system doesn't ask for the name of the contact.</li> <li>• Name (optional): The user can enter the name of the contact, but there's no forced validation.</li> </ul>

If	Value	Then
		<ul style="list-style-type: none"> <li>Name (required): The user must enter the contact's name.</li> </ul>

### [Signatures in Print Layout](#)

Use signature templates to configure the signature flow for an object and to include signatures of multiple roles in the Print Layout of the relevant process.

## Signatures in Print Layout

Use signature templates to configure the signature flow for an object and to include signatures of multiple roles in the Print Layout of the relevant process.

A store manager's signature confirming the order is included in the order confirmation PDF. You can create custom print layouts for other processes such as customer contracts and daily reports. You can configure up to four signatures to be included in the print layout.

SEE ALSO:

[Salesforce Help: General Limits](#)

### EDITIONS

Available in Lightning Experience in: **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled

## Master Data Management

Master data is a combination of legacy data and manually entered and maintained new data. Master data is the foundation of business processes and comprises business rules and functions for users, customers, regions, products, and organizational elements. Managing master data ensures consistency and control by providing processes to collect, aggregate, match, consolidate, quality-assure, and distribute data.

### [Customer Data Management](#)

Customer management refers to applying various techniques and methods to establish long-term relationships with key consumers based on data about their preferences, behaviors, and purchases. Use the Customer module to centrally create and monitor customer data, such as address, communication channels, contact partners, store opening hours, and point of sale, and avoid redundancy. For example, update all address data records of a customer by updating the address only one time in the Customer module. Or, add customer-specific conditions to a customer by using condition templates. Use store classification attributes and customers' trade org hierarchy for business processes such as strategic visit planning.

### [Product Management](#)

Product master data includes data that is required to identify a product.

### [Customize Product Offerings with Assortments](#)

Use our Assortment Management feature to create groups of products and associate the group with stores.

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

## Customer Data Management

Customer management refers to applying various techniques and methods to establish long-term relationships with key consumers based on data about their preferences, behaviors, and purchases. Use the Customer module to centrally create and monitor customer data, such as address, communication channels, contact partners, store opening hours, and point of sale, and avoid redundancy. For example, update all address data records of a customer by updating the address only one time in the Customer module. Or, add customer-specific conditions to a customer by using condition templates. Use store classification attributes and customers' trade org hierarchy for business processes such as strategic visit planning.

Customer data is fetched from legacy systems and include:

- Generic customer information, such as address, customer type, and customer category
- Customer hierarchy or trade organization hierarchy
- Customer roles and relationships that control various business processes

The customer types are:


- Trade organizations
- Stores
- Wholesalers
- Prospect clients

The customer categories are:

- Sold-to
- Ship-to
- Pay-to
- Bill-to

Use the Consumer Goods Cloud app to:

- Edit contact partner, opening times, and geo coordinates
- Maintain attachments
- Create customers or prospect clients

 **Note:** Customer management refers to applying various techniques and methods to establish long-term relationships with key consumers based on data about their preferences, behaviors, and purchases.

### [Create Accounts](#)

After importing account data from an Enterprise Resource Planning (ERP) system, create additional accounts.

### [Group Your Customers with Customer Segmentation](#)

Customer segmentation is the grouping of customers into target groups or customer sets for specific business processes, such as promotions, activities, or penny perfect pricing.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

## Create Accounts

After importing account data from an Enterprise Resource Planning (ERP) system, create additional accounts.

You can store these details in account records with basic account data, such as name and address:

- Customer Visit Setting: Configurations used for automatic call planning.
- Managers: Assigned users who visit an account based on calls planned.
- Contacts: Point of contact for an account.
- Customer Trade Organization Hierarchies: To build a trade org hierarchy.
- Customer Relationships: Wholesalers, payers, and delivery recipients for an account.
- Related Customer Relationships: Customers who are related to your customers.
- Org Units: Org units of a customer.
- Customer Conditions: Conditions with customer reference.
- Customer Extensions: Relationship between different user roles and customers.

1. From the App Launcher, find and select **Accounts**, and then click **New**.
2. Provide these details.

Field	Description
Identification	
Account Name	Name of a customer.
Account Owner	User responsible for a customer.
Customer Number	Unique identifier of a customer.
Customer Template	Template used to create a customer.
Parent Account	Name of the parent customer. The sales org of the parent account and the customer template must be the same.
Name 2	Another name for a customer.
Operating Hours	Availability of a customer.
External Id	Identification for external account record.

3. Enter the address and communication details, and then save your changes.

### [Add Contacts](#)

Contacts store customer information. The relation between contact and customer is stored as Customer data.

### [Add Customer Managers](#)

Customer Manager stores information about users who plan visits for an account.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create accounts:

- CGCloud Business Admin
- OR
- CGCloud Supervisor
- OR
- CGCloud Sales User
- OR
- CGCloud Sales Support

### [Add Customer Relationships](#)

A customer can have multiple relationships. For example, customers who receive goods ordered by a primary customer can be the customer's Delivery Recipient. And customers who pay the invoice can be the primary customer's Payer. But only one customer can be the primary customer's main customer. For example, a primary customer can have multiple wholesalers, but only one wholesaler can be the main wholesaler. All relationships have validity periods.

### [Add Related Customer's Relationships](#)

Add information about relationships for your related customer. For example, if you've a payer, add information about the other accounts that your payer is related to.

### [Create Customer Trade Org Hierarchies](#)

Create customer trade org hierarchies to better manage accounts.

### [Add Customer Org Units](#)

Create a relationship between an org unit and a customer.

### [Add Customer Visit Settings](#)

Customer visit settings are used for automatic visit planning.

### [Add Customer Extensions](#)

To display customers on mobile devices, add the Account Extension data record to a customer. Each extension can have multiple roles.

### [Create Listing Classifications](#)

Create listing classifications to let users define listing modules for an account for each category in the customer master data.

## Add Contacts

Contacts store customer information. The relation between contact and customer is stored as Customer data.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Contacts related list, click **New**.
4. Enter the customer and address details, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Add Customer Managers

Customer Manager stores information about users who plan visits for an account.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Customer Manager related list, click **New**.
4. Enter a customer name.
5. Select a management type:
  - Sales
  - Service
  - Consultant
  - Call Center
6. Select a user.
7. Activate the customer.
8. Select the customer as the main customer.
9. Enter the validity period for the relationship, and then save your changes.

## Add Customer Relationships

A customer can have multiple relationships. For example, customers who receive goods ordered by a primary customer can be the customer's Delivery Recipient. And customers who pay the invoice can be the primary customer's Payer. But only one customer can be the primary customer's main customer. For example, a primary customer can have multiple wholesalers, but only one wholesaler can be the main wholesaler. All relationships have validity periods.

A specific role can be a prerequisite for an assignment of customers through relationships. For example, only customers with the Payer role can be assigned to a customer through the Payer relationship.

1. From the App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Customer Relationships related list, click **New**.
4. Select a related customer.
5. Select a relationship type:
  - Bill To
  - Delivery Recipient
  - Payee
  - Payer
  - Wholesaler
6. Select the relationship as the primary relationship, if necessary.
7. Enter the validity period for the relationship, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Add Related Customer's Relationships

Add information about relationships for your related customer. For example, if you've a payer, add information about the other accounts that your payer is related to.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Customer Relationships related list, click **New**.
4. Select a related customer.
5. Select a relationship type:
  - Bill To
  - Delivery Recipient
  - Payee
  - Payer
  - Wholesaler
6. Select the relationship as the primary relationship.
7. Enter the validity period for the relationship, and then save your changes.

## Create Customer Trade Org Hierarchies

Create customer trade org hierarchies to better manage accounts.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Customer Trade Org Hierarchies related list, click **New**.
4. Select parent and child customers.
5. Enter the validity period for the hierarchy, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Add Customer Org Units

Create a relationship between an org unit and a customer.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Customer Org Units related list, click **New**.
4. Enter an org name and the customer name.
5. Activate the customer-org unit relationship.
6. Enter the validity period for the relationship, and then save your changes.


## Add Customer Visit Settings

Customer visit settings are used for automatic visit planning.

For a combination of management type and visit template, you can have only one active customer visit setting for a specified period.

You can plan visits:

- If the sales org of a visit and the sales org selected in automatic sales org flow are the same.
  - If a user is added as a customer manager and has the required access.
  - If a customer visit setting is valid during the visit creation date and has an active visit template associated with it.
1. From the App Launcher, find and select **Customers**.
  2. Select a customer.
  3. In the Customer Call Settings related list, click **New**.
  4. Provide these details:

Field	Description
Identification	
Customer	Name of the customer. This field is auto-populated with the selected customer.
Visit Template	Visit template used by the automatic visit planning algorithm for generating visits.  <b>Note:</b> The sales org of the customer and the call template must be the same.
Planning Mode	Mode of automatic visit planning. The options are: <ul style="list-style-type: none"> <li>• None: Visits aren't planned automatically.</li> </ul>

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User



Field	Description
	<ul style="list-style-type: none"> <li>• Start Week: Visits are planned for a specified frequency from a specified start week. After the end of a financial year, planning restarts from the start week.</li> <li>• Start Week Year: Visits are planned for a specified frequency from a specified start week. The start week is considered only for the initial year.</li> <li>• Last Call &amp; Frequency: Visits are planned based on last successfully completed visit and specified frequency.</li> </ul>
Frequency	Number of weeks between two calls.
Start Week	Week of the year from when automatic visit planning starts.
Management Type	<p>Management relation between a user and a customer. The options are:</p> <ul style="list-style-type: none"> <li>• Sales</li> <li>• Service</li> <li>• Consultant</li> <li>• Call Center</li> </ul> <p>This value is compared with the Default Management Type value set while assigning managers to customers. The value identifies the users for whom visits are created by automatic visit planning.</p>
Overdue Check	Indicates whether customers are overdue for a visit. This option appears only on mobile devices.
Active	Indicates whether a customer visit setting is active.
Time of Day	Time of the day used by the automatic planning algorithm to schedule visits.
Duration	Duration of a visit. If the field is blank, the duration defined in the visit template specified in the customer visit settings is used.
Day of Week	Day of the week used by the automatic planning algorithm to schedule visits.
Valid From	Start date of the validity period of a visit setting.
Valid Thru	End date of the validity period of a visit setting.

5. Save your changes.

## Add Customer Extensions

To display customers on mobile devices, add the Account Extension data record to a customer. Each extension can have multiple roles.

1. From the App Launcher, find and select **Customer**.
2. Select a customer.
3. In the Customer Extensions related list, click **New**.
4. Provide these details:

Field	Description
Identification	
Customer	Name of a customer.
External ID	Description of the segmentation rule definition.
State	The status of the account. The options are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Prepared for Deletion</li> </ul>
Account Classification	
Priority	Classification of a company based on the priority level. The options are: <ul style="list-style-type: none"> <li>• A-Priority</li> <li>• B-Priority</li> <li>• C-Priority</li> </ul>
Class of Trade	Classification of a trade with which business is conducted. For example, a drug store, hypermarket, restaurant, grocery store, or kiosk.
Company Type	Type of customer. The options are: <ul style="list-style-type: none"> <li>• Retailer: Large retail chain involved in selling goods</li> <li>• Independent: Smaller traders, such as kiosks and departmental stores</li> <li>• On-Trade: Businesses with hotels, bars, and restaurants</li> <li>• Customer: A wholesaler or a distributor</li> <li>• Third party: Third-party individuals, such as wholesalers and suppliers</li> </ul>

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

Field	Description
Org level	Org level classification of a customer. The options are Customer Level 1, 2, 3, 4, 5, 6, and 7.
Account Status	
Phase	Systems where records of an account are stored. The options are: <ul style="list-style-type: none"> <li>• Priority ERP</li> <li>• Priority CRM</li> <li>• Only CRM</li> </ul>
Sales Relevant	Relevance of an account for sales activities. The options are: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
Complex Pricing Configuration	
Pricing Type	Type of pricing. The options are: <ul style="list-style-type: none"> <li>• Standard</li> <li>• Standard incl. Sales Tax</li> <li>• Sample/Donation</li> </ul>
Promotion Role	
Promotion Valid From	Start date of a promotion's validity.
Promotion Valid Thru	End date of a promotion's validity.
Account Plan Type	Enables account planning for a customer. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Plan</li> </ul>
Customer Role	
Customer ID	Unique identification code of a customer.
Customer Role Number	Role number of a customer.
Customer Role Price Type	Price type of a customer role. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Factory</li> <li>• Consumer</li> <li>• Not Relevant</li> </ul>
Customer Role Price List Type	Price list type of a customer role. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Wholesaler</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• Direct Customer</li> <li>• Not Relevant</li> </ul>
Customer Role Valid From	Date from which a customer role is valid.
Customer Role Valid Thru	Date until which a customer role is valid.
Bill to Role	
Bill to Role Valid From	Date from which the bill to role is valid.
Bill to Role Valid Thru	Date until which the bill to role is valid.
Delivery Role	
Delivery Role Modify Preset Quantity	<p>Indicates whether quantity modifications are allowed for delivery documents. The options are:</p> <ul style="list-style-type: none"> <li>• No</li> <li>• Yes</li> <li>• Only Decrease</li> <li>• Only Increase</li> </ul>
Delivery Role Valid From	Date from which the delivery role is valid.
Delivery Role Valid Thru	Date until which the delivery role is valid.
Broker Role	
Broker Role Valid From	Date from which the broker role is valid.
Broker Role Valid Thru	Date until which the broker role is valid.
Store Role	
Store Role Valid From	Date from which the store role is valid.
Store Role Valid Thru	Date until which the store role is valid.
Consider Module	<p>Indicates whether an account is considered for listing modules. Select the field when you further filter products that are considered for prepopulation in the order items screen based on listing module and listing classification.</p>
Order Role	
Order Role Orderer Type	<p>Type of business partner ordering a product. The options are:</p> <ul style="list-style-type: none"> <li>• Direct</li> <li>• Indirect</li> <li>• Backend Replenishment</li> </ul>

Field	Description
Order Role Order Template Blocked	Process of temporarily blocking an order template to restrict a customer from ordering specific products. The options are: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• Warning</li> </ul>
Order Role Valid From	Date from which an order role is valid.
Order Role Valid Thru	Date until which an order role is valid.
Payer Role	
Payer Role Credit Rating	Credit rating of a customer.
Payer Role Credit Block	Indicates whether a customer role is blocked.
Payer Role Overall Credit Limit	Overall credit limit of a customer.
Document Transaction Type	Mode to handle orders. Specifies payment type and defines detailed behavior of a delivery document. The options are: <ul style="list-style-type: none"> <li>• Cash Invoice</li> <li>• Credit Invoice</li> <li>• Valuated Delivery Note</li> <li>• Non-Valuated Delivery Note</li> </ul>
Payer Role Valid From	Date from which a payer role is valid.
Payer Role Valid Thru	Date until which a payer role is valid.
Fund Role	
Fund Role Valid From	Date from which a fund role is valid.
Fund Role Valid Thru	Date until which a fund role is valid.
Miscellaneous	
Match Code	Match code of a business partner.
Date Closure	Date on which a company closed.
Tax Jurisdiction Code	Code to make tax payments.
Week Day Share Profile	Profile that shows the distribution volume for a week.
Budget Management Details	
Fixed Overdraw %	Fixed overdraw allowance percentage.
RBF Overdraw %	RBF-based overdraw allowance percentage.
Customer KPIs	
Distribution Issue	Indicates any distribution issues in the last relevant visit.

Field	Description
OoS Issue	Indicates any out-of-stock issues in the last relevant visit.

5. Save your changes.

## Create Listing Classifications

Create listing classifications to let users define listing modules for an account for each category in the customer master data.

1. From App Launcher, find and select **Customers**.
2. Select a customer.
3. In the Listing Classifications related list, click **New**.
4. Select a product category.

One product category can be assigned to only one listing module.

5. Enter a listing module.

Add only listing modules assigned to relevant product assortments of a selected customer to a product category. Valid product assortments are determined for an account based on first-hit algorithm. Duplicate values of listing modules for a product assortment are eliminated.

6. Save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Group Your Customers with Customer Segmentation

Customer segmentation is the grouping of customers into target groups or customer sets for specific business processes, such as promotions, activities, or penny perfect pricing.

Grouping customers by relevant attributes can save you time and effort because you can plan and perform tasks or activities at the group level instead of repeating them for each customer. For example:

- Create customer sets for a specific product and then plan the tasks or activities for the customer sets.
- Create and assign a promotion to a customer set instead of creating multiple promotions for individual customers.

You can create a customer set with customers from different org unit hierarchies. For example, you can create a customer set for all grocery stores, even if they belong to different accounts. Grouping all grocery stores reduces effort, improves accuracy during planning, and helps reps when the tasks to perform are identical at each store.

Here are some of the tasks that you can perform on customer sets:

- Create activities targeted at your key customers.
- Create visits for customers facing an out-of-stock situation.
- Create visits to check assets only for customers who have assets or have reported an issue.
- Define different sales activities for field sales teams that are responsible for different states.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

To create customer sets easily and quickly, admins create segmentation rules with the help of rule templates and rule definitions. When the rules are run, customer sets are automatically created. For more information on customer segmentation rules, see [Customer Segmentation](#).

If you're dealing with a small number of customers, you can also create customer sets manually. Create a customer set manually if you know which customers you want to add and the customer list doesn't change often. For example, if your customer set is a list of local stores, which is fairly stable over time.

### [Create Customer Sets](#)

Make administration easy by grouping customers into customer sets. For example, to associate a promotion to a large number of customers, create a customer set, and then assign the promotions to the set.

## Create Customer Sets

Make administration easy by grouping customers into customer sets. For example, to associate a promotion to a large number of customers, create a customer set, and then assign the promotions to the set.

1. From App Launcher, find and select **Customer Sets**, and then click **New**.
2. Select a sales org for the customer set.
3. Enter description
4. Save your changes.

### [Add Customers to Customer Sets](#)

Add customers with similar requirements to a customer set. Always add customers from the same sales org as the customer set.

### [Add Managers to Customer Sets](#)

Assign managers to customer sets. The management relation between a user and a customer set has a validity period.

## Add Customers to Customer Sets

Add customers with similar requirements to a customer set. Always add customers from the same sales org as the customer set.

1. From App Launcher, find and select **Customer Sets**.
2. Select a customer set.
3. In the Customer Set Customers related list, click **New**.
4. Select a customer, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer sets:

- CGCloud Business Admin
- OR
- CGCloud Supervisor
- OR
- CGCloud Sales Support

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Add Managers to Customer Sets

Assign managers to customer sets. The management relation between a user and a customer set has a validity period.

1. From App Launcher, find and select **Customer Sets**.
2. Select a customer set.
3. In the Customer Set Managers related list, click **New**.
4. Select a user.
5. Activate the manager association.
6. Select the validity period for the relationship, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Product Management

Product master data includes data that is required to identify a product.

Product master data provides these details:

- Product hierarchy: Relationships between products.
- Product attributes: Definition of various product attributes, such as product type, pack size, container type, and product form.
- Product conditions: Pricing conditions for products.
- Units of measure: Logistical units of a product.

Historical products are customer-specific products that sales reps add for customers who don't maintain assortment lists, such as kiosks, to conduct surveys during visits. Sales reps who conduct surveys for the first time must manually add the products. The products are pre-populated for later visits.

### EDITIONS

Available in: Lightning Experience in **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled

### [Create Products](#)

Product master data is imported from an ERP system. Use the Product module to create additional product records.

### [Associate a Product with a Store](#)

Associate products with stores to easily track products sold at a specific store. You can mark the top-selling products as favorites and also enter a display order for each product. Display order determines the sequence of products whose assessment indicators are to be captured when performing a task. When account hierarchy for products is enabled, the products that are assigned to a retail store parent account are automatically available to all stores in that account hierarchy.

### [Create a Product Category](#)

Group products into product categories based on physical attributes or specific purposes. A product category groups products at the highest level of the product hierarchy and dictates the visibility of products in an account plan and in advanced promotions. A Key Account Manager can create promotions and assortments by product categories.

### [Assign a Product to a Product Category](#)

You can assign a product to multiple product categories.



[Add Product Parts](#)

A product can consist of a number of products, called product parts. You can add multiple child products to a parent product. But you can't add a parent product as its own child product. The assignment of product parts to products is time-dependent.

[Add a Product Warehouse](#)

Add details about the warehouse where a product is stored.

[Add a Unit of Measure](#)

You can define multiple units of measure (UoMs) for each product. Use UoMs to efficiently manage orders for a product and its distribution.

[Add Product Image](#)

Add an image for a product that is shown for the product in the Consumer Goods Cloud offline mobile app.

## Create Products

Product master data is imported from an ERP system. Use the Product module to create additional product records.

1. From App Launcher, find and select **Products**, and then click **New**.
2. Select a record type, and then click **Next**.
3. Provide these details:

Field	Description
Identification	
Product Name	Name of the product.
Category	Category of the product.
Competitor's Product	Indicates if a product is competitors' product. Competitors' products are relevant for product surveys during calls.
Product Template	Template to create the product. You can select from all active product templates.
Consumer Goods Product Code	Unique identifier of the product. Interfaced from an ERP system.
Product Short Code	Identifier of the product. Interfaced from an ERP system.
Product Type	The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Commodity</li> <li>• Service</li> <li>• Advertising Material</li> <li>• Empty</li> <li>• Asset Type</li> </ul>

### EDITIONS



Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled





### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

Field	Description
GTIN	Global Trade Item Number of the product. Interfaced from an ERP system.
Tax Classification	<p>Tax classification of a product. Interfaced from an ERP system. Use this information to find conditions for price calculation of orders. The options are:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• Normal</li> <li>• Reduced</li> <li>• Full</li> </ul>
State	<p>State of a product. The options are:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• Preparation</li> <li>• Plan</li> <li>• Check</li> <li>• Startup</li> <li>• Active</li> <li>• Paused</li> <li>• Phase Out</li> <li>• Reminders</li> <li>• Passive</li> <li>• Deleted</li> </ul>
Asset Template	Asset template associated with a product. You can select from active asset templates that belong to the same sales org as the product.
Criteria	
Product Level	<p>Definition of the product hierarchy. The options are:</p> <ul style="list-style-type: none"> <li>• Category</li> <li>• Sub Category</li> <li>• Brand</li> <li>• Sub Brand</li> <li>• Product Price Group</li> <li>• Product</li> </ul>
Pack Size	Number of product units in a pack.
Pack Size Unit	<p>Unit size of a packet of a product. The options are:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• pk</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• box</li> </ul>
Product Form	Form of the product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Solid</li> <li>• Liquid</li> </ul>
Container Size	Amount of product in a container.
Container Size Unit	Unit size of a container of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• oz</li> <li>• l</li> <li>• ml</li> <li>• gal</li> <li>• m<sup>3</sup></li> </ul>
Container Type	Type of container of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Can</li> <li>• Bottle</li> <li>• Plastic</li> </ul>
Description	
Description 1 Language 1/2/3/4	Product description in the languages configured for the sales org.
Description 2 Language 1/2/3/4	Additional product description languages configured for the sales org.
Short Description Language 1/2/3/4	Short description of the product languages configured for the sales org.
Criterion Information	
Category	Specifies a product's level as Category. <p> <b>Note:</b> The sales org of the product selected as category and the product created must be the same.</p>
Sub Category	Specifies a product's level as Sub Category. <p> <b>Note:</b> The sales org of the product selected as sub category and the product created must be the same.</p>

Field	Description
Brand	Specifies a product's level as Brand.  <b>Note:</b> The sales org of the product selected as brand and the product created must be the same.
Flavor	Specifies a product's level as Sub Brand.  <b>Note:</b> The sales org of the product selected as flavor and the product created must be the same.
Package	Specifies a product's level as Product Price Group.  <b>Note:</b> The sales org of the product selected as package and the product created must be the same.
Criterion 6 Product	Used only for products whose Product Level is Product.  <b>Note:</b> The sales org of the product selected as criterion 6 and the product created must be the same.
States	
Delivery Valid From	Date from which a product can be added to an order. The product has a Delivery state.
Delivery Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Delivery state.
Field Valid From	Date from which a product can be added to an order. The product has a Field state. Field state ensures that the product appears in product overview when products are added to disposal list of an order.
Field Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Field state.
KAM Valid From	Date from which a product can be added to an order. The product has a KAM state. KAM state ensures that the product appears in product overview when it's added to a customer contract.
KAM Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the KAM state.
New Item Valid From	Date from which a product can be added to an order. The product has a New state. New products can be added to disposal list of orders for new item promotions.
New Item Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the New state.

Field	Description
Fund Valid From	Date from which a product can be added to an order. The product has a Fund state. Funds can be anchored only on products with a valid Fund state.
Fund Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Fund state.
Asset Information	
Manufacturer	Asset manufacturer's name.
Manufacturer Item Number	Item number of an asset.
Estimated Value	Estimated value of an asset.
Power Supply Connected	Determines whether the assets need power supply.
Size	Size of an asset.
Height	Height of an asset.
Weight	Weight of an asset.

#### 4. Save your changes.

#### [Add Scan and Search in Salesforce Mobile and Lightning Experience](#)

Add the search and scan options to the assessment task page to enable field reps to use the search bar or barcodes to search for a product on their mobile device.

#### SEE ALSO:

[Salesforce Help: Supported Barcodes](#)

## Add Scan and Search in Salesforce Mobile and Lightning Experience

Add the search and scan options to the assessment task page to enable field reps to use the search bar or barcodes to search for a product on their mobile device.

 **Note:** The search and scan options are visible only for the inventory and order assessment types.

1. From Setup, select **Object Manager**.
2. In the Quick Find box, enter *Assessment Task*, and then select **Assessment Task**.
3. Click **Page Layouts**, and then select **Assessment Task Layout**.
4. Click **Mobile and Lightning Actions**.
5. Drag **Search** and **Scan** from the panel onto the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.

#### EDITIONS

Available in Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions with the Consumer Goods Cloud enabled

#### USER PERMISSIONS

To customize assessment task page:

- Consumer Goods Cloud User

## Associate a Product with a Store

Associate products with stores to easily track products sold at a specific store. You can mark the top-selling products as favorites and also enter a display order for each product. Display order determines the sequence of products whose assessment indicators are to be captured when performing a task. When account hierarchy for products is enabled, the products that are assigned to a retail store parent account are automatically available to all stores in that account hierarchy.

When sequencing the assessment indicator of products during a task, the display order is considered only if the product isn't associated with the retail store through account hierarchy.

1. From the App Launcher, find and open **Retail Stores**.
2. Select the store.
3. From the Store Products related list, click **Add**.
4. Select the date to apply the association.
5. Select a product.  
You can mark the product as Favorite and enter a default quantity.
6. Enter the display order of the product.
7. Save your changes.

SEE ALSO:

[Salesforce Help: Enable Account Hierarchy for Products](#)

## Create a Product Category

Group products into product categories based on physical attributes or specific purposes. A product category groups products at the highest level of the product hierarchy and dictates the visibility of products in an account plan and in advanced promotions. A Key Account Manager can create promotions and assortments by product categories.

Create a product catalog before you create a product category.

1. From the App Launcher, find and select **Categories**, and then click **New**.
2. Enter a name and description.
3. Select a catalog.
4. To show the product category on a menu, select **Show In Menu**.
5. Enter a sort order.
6. Select a parent category.
7. Save your changes.

SEE ALSO:

[Salesforce Help: Catalog Design](#)

### EDITIONS

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

### EDITIONS

Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create a product category:

- Consumer Goods Cloud User

## Assign a Product to a Product Category

You can assign a product to multiple product categories.

1. From App Launcher, find and open **Categories**.
2. Select a product category.
3. In the Products related list, click **Assign Products**.
4. Select one or more products, and then click **Next**.
5. Review the assigned products, and then save your changes.

## Add Product Parts

A product can consist of a number of products, called product parts. You can add multiple child products to a parent product. But you can't add a parent product as its own child product. The assignment of product parts to products is time-dependent.

1. From App Launcher, find and select **Products**.
2. Select a product.
3. In the Product Parts related list, click **New**.
4. Select a parent product and the child products.
5. Enter the quantity for the parent product.
6. Enter the validity period for the assignment.
7. Save your changes.

## Add a Product Warehouse

Add details about the warehouse where a product is stored.

1. From App Launcher, find and select **Products**.
2. Select a product.
3. In the Warehouse related list, click **New**.
4. Select a product.
5. Select a warehouse.
6. Activate the association, and then save your changes.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To assign a product to a product category:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To add product parts:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS


To add a product warehouse:

- Consumer Goods Cloud User

## Add a Unit of Measure

You can define multiple units of measure (UoMs) for each product. Use UoMs to efficiently manage orders for a product and its distribution.

For order taking, add a UoM of the product as a consumer unit by selecting the unit type as Consumer Unit. Additionally, mark another UoM as an order unit and price unit by selecting the Is Order Unit and Is Price Unit checkboxes.

 **Note:** Only the products with default UoM—Is Order Unit and Order Ability set to True—are prepopulated in the disposal list in the order items screen. When more than one UoM is marked as default, the UoM is selected based on the sort order assigned.

Add logistical units for a product to:

- Define a hierarchy of logistical units.
- Specify packaging and containment of logistical units in parent units.
- Define attributes for independent logistical units, for example, specify whether a logistical unit is a default order unit of a product.
- Specify the weight and volume of a product as per predefined units.

1. From the App Launcher, find and select **Products**.
2. Select a product.
3. On the Units of Measure related tab, click **New**.
4. Provide these details:

Field	Description
Identification	
Unit Type	UoM of a product. The options are: <ul style="list-style-type: none"> <li>• Consumer Unit</li> <li>• Sales Unit</li> <li>• Layer</li> <li>• Pallet</li> <li>• All</li> </ul>
Sort	Order of a unit in the hierarchy.
Pieces per Parent Unit	Number of pieces of the unit that makes one parent unit.
Pieces per Smallest Unit	Number of pieces of the smallest unit in the hierarchy that makes one unit.
GTIN	Global Trade Item Number of the product. This information is interfaced from an ERP system.
Configuration	
Is Order Unit	Indicates whether a UoM is the default order unit of the product. Products with the default UoM are prepopulated in the disposable list in new orders.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create a UoM:

- Consumer Goods Cloud User



Field	Description
Is Consumer Unit	Indicates whether a UoM is the consumer unit of the product.
Rounding Rule	<p>Specifies the rules for rounding of quantities entered while placing an order. You can round off only to the UoM marked as rounding targets. The options are:</p> <ul style="list-style-type: none"> <li>• Never: The ordered quantity isn't rounded.</li> <li>• Up: The ordered quantity is rounded to a full value of the next higher rounding target.</li> <li>• Down: The ordered quantity is rounded to a full value of the next lower rounding target.</li> <li>• Nearest: The ordered quantity is rounded to a full value of the nearest rounding target.</li> <li>• User Exit: Suggest: The ordered quantity is rounded off per project customization.</li> </ul> <p>The unit of measure with the highest sort number must have the rounding rule Never.</p>
Order Ability	<p>Indicates whether a UoM is available for placing orders.</p> <p>Select <b>Yes</b> for products to be considered for prepopulation in the order items screen.</p>
Is Price Unit	<p>Indicates whether a UoM is the default unit for pricing.</p> <p>For prepopulation, on the order items screen, select Yes.</p>
Rounding Target	Indicates whether a UoM can be used for rounding order quantities entered using smaller UoM.
Pricing Relevant Size	
Weight	Specifies the weight of a product in tons, kilograms, pounds, and ounces.
Volume	Specifies the volume of a product in liters, gallons, and cubic meters.


5. Save your changes.


## Add Product Image

Add an image for a product that is shown for the product in the Consumer Goods Cloud offline mobile app.

1. From the App Launcher, find and select **Products**.
2. Select a product.
3. In the Files related list, click **Add Files**.

 **Note:** The Add Files field must be added to the Product page layout.

4. Select a file, and then click **Add**.
5. Click the file, click , and then select **Edit File Details**.
6. In Usage, select **Icon**.
7. Save your changes.

 **Note:** Similarly, you can add images for the Account, Contacts, and Retail Stores objects. The images are shown in the Consumer Goods Cloud offline mobile app.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To add a product image:

- Consumer Goods Cloud User

## Customize Product Offerings with Assortments

Use our Assortment Management feature to create groups of products and associate the group with stores.

For example, as a Consumer Goods company, you offer 1,000 products. But, NTO stores sell only 400 of your products. To make things easier to manage, you can create an assortment and add these 400 products to the assortment.

Assortments are different from product categories. A product category is an item, for example, beverages. An assortment can have products from different product categories. You can use product assortments for both Retail Execution and Trade Promotion Management (TPM). But, depending on the record type, the features available for product assortment can vary. For example, category segregation is available only for TPM.

### [Manage Advanced Product Assortments](#)

Use the Assortment Management feature to manage your assortments more easily.

### [Manage Product Assortments](#)

If you use the Consumer Goods Winter '22 data model or earlier, you can only create an assortment, add products to an assortment, and associate the assortment with a store. When an assortment is associated with a store, it's referred to as store assortment. Products from a store assortment are available to order when an order is created for the store. We recommend that you associate an assortment at the store group level. If you have an assortment at the store group level and another assortment at the store level, the store level assortment takes precedence.

### [Edit Products of an Assortment](#)


Edit and manage product assortments efficiently. You can edit multiple products and up to 5,500 fields in the products grid at a time.

## Manage Advanced Product Assortments

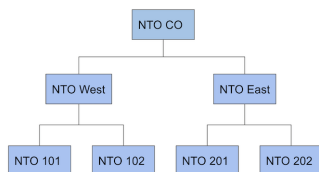
Use the Assortment Management feature to manage your assortments more easily.

You can create these types of assortments.

- **Authorization List:** A long-term agreement between you and a retail account. An authorization list contains products that are available for a customer org, the org’s subordinate stores, and the target values to be maintained for the products. When an order or survey is created for an account, these products are available in the order disposal list and the product’s target values (for price and facings) act as the preset values for surveys. Authorization lists are also called listings, assortment lists, or assortments.
- **Customer Selling Assortment:** A group of products that acts as a listing for independent customers or stores that don’t have an assortment list. For example, in a specific region, a brewery sells only a specific brand of drinks. So, for products that are sold in this region, create a customer selling assortment. You can use customer selling assortments only for online orders and not for orders in the Consumer Goods offline mobile app.
- **Sales Document Assortment:** Restricts specific orders to specific order types. For example, premium advertisement material can be ordered only in a specific pre-approved advertisement order. To make the products of a sales document assortment available in an order disposal list, associate the relevant order template with the sales document assortment.

 **Note:** The Advanced Product Assortments feature is available only with the enhanced Consumer Goods cloud data model.

You can associate an authorization list with any node in an account hierarchy. Depending on the node level that an assortment is associated with, products from the authorization list are available as the order disposal list of the store. Here’s an example of an account hierarchy.



In this account hierarchy, if you assign authorization list A to NTO CO, and authorization list B to only NTO 202, then authorization list A is applicable to all stores under NTO CO except NTO 202. For NTO 202, authorization list B is applicable because authorization list B specifically assigned to the store. So, when a field rep places an order for all stores except NTO 202, products from authorization list A are available in the order disposal list. And, when an order is placed for NTO 202, products from authorization list B are available in the order disposal list. You can assign an account only to authorization lists and customer selling assortments. Sales document assortments are applicable for an order depending on the associated order template.

### Manage Product Assortments for Multiple Store Formats Using Listing Modules

If you’re a retailer who has multiple store formats, such as hypermarket, supermarket, standard market, and small shop, a single authorization list probably isn’t sufficient. In such cases, you can define a module for each store format. By using a module, you can meet the various assortment needs of a customer with only one assortment. For example, you can create a module and add products that are sold in a hypermarket but not in a supermarket to the module.

Let’s see how listing modules work. For example, for the account hierarchy, create an authorization list A and add two products from category A and two products from category B to the list.

Authorization List A	Category A	<ul style="list-style-type: none"> <li>• Product 1</li> <li>• Product 2</li> </ul>
	Category B	<ul style="list-style-type: none"> <li>• Product X</li> <li>• Product Y</li> </ul>

Assign the authorization list to NTO CO. Then, create two modules for authorization list A, Hypermarket and Supermarket, and select the products and define the target values listed in the table.

Listing Module	Product Category: Product	Target Values
Hypermarket	Category A: Product 1 Category B: Product X and Product Y	Product 1 <ul style="list-style-type: none"> <li>• Price: 100</li> <li>• Facings 10</li> </ul> Product X <ul style="list-style-type: none"> <li>• Price: 200</li> <li>• Facings: 20</li> </ul> Product Y <ul style="list-style-type: none"> <li>• Price: 110</li> <li>• Facings: 5</li> </ul>
Supermarket	Category A: Product 1 and Product 2 Category B: Product Y	Product 1 <ul style="list-style-type: none"> <li>• Price: 50</li> <li>• Facings 2</li> </ul> Product 2 <ul style="list-style-type: none"> <li>• Price: 100</li> <li>• Facings: 10</li> </ul> Product Y <ul style="list-style-type: none"> <li>• Price: 75</li> <li>• Facings: 5</li> </ul>

### Associate Listing Modules to Accounts Using Listing Classifications

After you define your listing modules, define the listing classification as listed in the table.

Account	Product Category	Listing Module
NTO West	Category A	Hypermarket
	Category B	Supermarket
NTO East	Category A	Supermarket
	Category B	Supermarket

### Product Determination for Orders and Surveys Based on Listing Modules

When an order is placed, the order disposable list contains these products based on your listing classifications.

Account	Product Added in Disposal List	Reason
NTO West	Product 1	For Category A, the selected listing module is Hypermarket, and Hypermarket has only Product 1 from Category A.

Account	Product Added in Disposal List	Reason
	Product Y	For Category B, the selected listing module is Supermarket, and Supermarket has only Product Y from Category B.
NTO East	Product 1 and Product 2	For Category A, the selected listing module is Supermarket, and Supermarket has Product 1 and Product 2 from Category A.
	Product Y	For Category B, the selected listing module is Supermarket, and Supermarket has only Product Y from Category B.

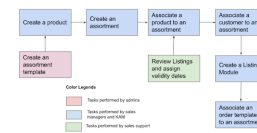
The products available for a survey and the preset values appear based on your listing classifications as listed in the table. Based on your listing classifications, when a survey is conducted, the products available for the survey and their preset values are listed in the table.

Account	Product Added for Survey	Reason
NTO West	Product 1	Product 1 <ul style="list-style-type: none"> <li>• Price: 100</li> <li>• Facings 10</li> </ul>
	Product Y	Product Y <ul style="list-style-type: none"> <li>• Price: 75</li> <li>• Facings: 5</li> </ul>
NTO East	Product 1 and Product 2	Product 1 <ul style="list-style-type: none"> <li>• Price: 50</li> <li>• Facings 2</li> </ul> Product 2 <ul style="list-style-type: none"> <li>• Price: 100</li> <li>• Facings: 10</li> </ul>
	Product Y	Product Y <ul style="list-style-type: none"> <li>• Price: 75</li> <li>• Facings: 5</li> </ul>

The user personas involved in managing assortments listed in the table.

User Persona	Responsibilities
Sales Manager	<ul style="list-style-type: none"> <li>• Manages listings</li> </ul>

User Persona	Responsibilities
	<ul style="list-style-type: none"> <li>Manages product assortments</li> </ul>
Sales Support Executive	<ul style="list-style-type: none"> <li>Ensures assignment of validity periods to individual products</li> <li>Reviews listings</li> <li>Defines target values for product surveys</li> </ul>
Key Account Manager (KAM)	Manages product assortments
Admin	<ul style="list-style-type: none"> <li>Changes the record type of product assortment templates</li> <li>Manages product assortment templates</li> </ul>



Here's a typical workflow that shows how to manage advanced product assortments.

## Product Assortment Limitations

Here are the limitations of product assortments.

- You can create up to 10 listing modules for an assortment.
- You can add up to 50 target values for a product per module.
- One product assortment can have up to 1,000 valid products daily.
- One product assortment can have up to 10,000 products.

### Create Products

Product master data is imported from an ERP system. Use the Product module to create additional product records.

### Create an Assortment

An assortment is a group of products eligible for sale at a store, store group, or account. An assortment can have products from various product categories and defines product distribution over regions or customers.

### Add Products to a Product Assortment

To create an authorization list, add products to an assortment.

### Add a Customer to an Assortment

To make an assortment available to a customer, add the customer to the assortment.

### Create a Listing Module

To meet the various assortment needs of a customer with an assortment, create a listing module. For every module, you can define target values for price and facings for each product of the assortment.

### Create a Listing Classification

To add a listing module to an account, create a listing classification. Order disposal lists and preset values for surveys are determined based on this assignment.

### Assign Order Templates to Product Assortments

For sales document assortments, assign order templates to an assortment. When reps create an order by using this order template, the products of the assortment are available in the order disposal list.

## Create Products

Product master data is imported from an ERP system. Use the Product module to create additional product records.

1. From App Launcher, find and select **Products**, and then click **New**.
2. Select a record type, and then click **Next**.
3. Provide these details:

Field	Description
Identification	
Product Name	Name of the product.
Category	Category of the product.
Competitor's Product	Indicates if a product is competitors' product. Competitors' products are relevant for product surveys during calls.
Product Template	Template to create the product. You can select from all active product templates.
Consumer Goods Product Code	Unique identifier of the product. Interfaced from an ERP system.
Product Short Code	Identifier of the product. Interfaced from an ERP system.
Product Type	The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Commodity</li> <li>• Service</li> <li>• Advertising Material</li> <li>• Empty</li> <li>• Asset Type</li> </ul>
GTIN	Global Trade Item Number of the product. Interfaced from an ERP system.
Tax Classification	Tax classification of a product. Interfaced from an ERP system. Use this information to find conditions for price calculation of orders. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Normal</li> </ul>

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled





### USER PERMISSIONS



To create customer conditions:

- Consumer Goods Cloud User

Field	Description
	<ul style="list-style-type: none"> <li>• Reduced</li> <li>• Full</li> </ul>
State	State of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Preparation</li> <li>• Plan</li> <li>• Check</li> <li>• Startup</li> <li>• Active</li> <li>• Paused</li> <li>• Phase Out</li> <li>• Remainders</li> <li>• Passive</li> <li>• Deleted</li> </ul>
Asset Template	Asset template associated with a product. You can select from active asset templates that belong to the same sales org as the product.
Criteria	
Product Level	Definition of the product hierarchy. The options are: <ul style="list-style-type: none"> <li>• Category</li> <li>• Sub Category</li> <li>• Brand</li> <li>• Sub Brand</li> <li>• Product Price Group</li> <li>• Product</li> </ul>
Pack Size	Number of product units in a pack.
Pack Size Unit	Unit size of a packet of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• pk</li> <li>• box</li> </ul>
Product Form	Form of the product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Solid</li> <li>• Liquid</li> </ul>
Container Size	Amount of product in a container.



Field	Description
Container Size Unit	Unit size of a container of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• oz</li> <li>• l</li> <li>• ml</li> <li>• gal</li> <li>• m<sup>3</sup></li> </ul>
Container Type	Type of container of a product. The options are: <ul style="list-style-type: none"> <li>• None</li> <li>• Can</li> <li>• Bottle</li> <li>• Plastic</li> </ul>
Description	
Description 1 Language 1/2/3/4	Product description in the languages configured for the sales org.
Description 2 Language 1/2/3/4	Additional product description languages configured for the sales org.
Short Description Language 1/2/3/4	Short description of the product languages configured for the sales org.
Criterion Information	
Category	Specifies a product's level as Category.  <b>Note:</b> The sales org of the product selected as category and the product created must be the same.
Sub Category	Specifies a product's level as Sub Category.  <b>Note:</b> The sales org of the product selected as sub category and the product created must be the same.
Brand	Specifies a product's level as Brand.  <b>Note:</b> The sales org of the product selected as brand and the product created must be the same.
Flavor	Specifies a product's level as Sub Brand.  <b>Note:</b> The sales org of the product selected as flavor and the product created must be the same.

Field	Description
Package	Specifies a product's level as Product Price Group.  <b>Note:</b> The sales org of the product selected as package and the product created must be the same.
Criterion 6 Product	Used only for products whose Product Level is Product.  <b>Note:</b> The sales org of the product selected as criterion 6 and the product created must be the same.
States	
Delivery Valid From	Date from which a product can be added to an order. The product has a Delivery state.
Delivery Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Delivery state.
Field Valid From	Date from which a product can be added to an order. The product has a Field state. Field state ensures that the product appears in product overview when products are added to disposal list of an order.
Field Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Field state.
KAM Valid From	Date from which a product can be added to an order. The product has a KAM state. KAM state ensures that the product appears in product overview when it's added to a customer contract.
KAM Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the KAM state.
New Item Valid From	Date from which a product can be added to an order. The product has a New state. New products can be added to disposal list of orders for new item promotions.
New Item Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the New state.
Fund Valid From	Date from which a product can be added to an order. The product has a Fund state. Funds can be anchored only on products with a valid Fund state.
Fund Valid Thru	Date on which a product can longer be added to an order. The product is no longer in the Fund state.
Asset Information	
Manufacturer	Asset manufacturer's name.
Manufacturer Item Number	Item number of an asset.

Field	Description
Estimated Value	Estimated value of an asset.
Power Supply Connected	Determines whether the assets need power supply.
Size	Size of an asset.
Height	Height of an asset.
Weight	Weight of an asset.

#### 4. Save your changes.

#### [Add Scan and Search in Salesforce Mobile and Lightning Experience](#)

Add the search and scan options to the assessment task page to enable field reps to use the search bar or barcodes to search for a product on their mobile device.

#### SEE ALSO:

[Salesforce Help: Supported Barcodes](#)

## Create an Assortment

An assortment is a group of products eligible for sale at a store, store group, or account. An assortment can have products from various product categories and defines product distribution over regions or customers.

1. From the App Launcher, find and select **Assortments**, and then click **New**.
2. Provide these details:

Field	Description
<b>Identification</b>	
Name	Name of the product assortment.
Obligatory	Indicates if a product assortment is closed. Products that are part of an assortment can be included in an order. This setting is relevant only for Assortment List record type.  Products that aren't added in an assortment can also be added to an order. To add such products to an order, use an order item template that has the Closed Listing option selected. The order item template must be related to the order template.
Product Assortment Template	Product assortment template used for creating the product assortment.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

#### USER PERMISSIONS

To create an assortment:

- CGCloud Sales User

Field	Description
Valid From	Start date of the validity period of a product assortment.
Valid Thru	End date of the validity period of a product assortment.
<b>Description</b>	
Description Language 1/2/3/4	Description of a customer template in the languages configured for the sales org.

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

3. Save your changes.

## Add Products to a Product Assortment

To create an authorization list, add products to an assortment.

1. From App Launcher, find and open **Product Assortments**.
2. Select an assortment.
3. In the Products related list, click **Add**.
4. Search and select one or more products.

Search products by using an option:

- From the Lookup section:
  - To search by product name, select **Name**.
  - To search by using fields of the product object, select **All Fields**, enter the search string, and then click **Go**.
- Set filters in the Products section:

Filter Criteria	Description
Description 1	Product description.
Product Name	Name of the product.
GTIN	Global trade item number of the product.
Product Type	Product type. The options are: <ul style="list-style-type: none"> <li>– Commodity</li> <li>– Service</li> <li>– Advertising</li> <li>– Empty</li> <li>– Asset Type</li> <li>– Counting Group</li> </ul>

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

Filter Criteria	Description
Product Level	<p>Product level used for defining product hierarchy. The options are:</p> <ul style="list-style-type: none"> <li>- Category</li> <li>- Sub Category</li> <li>- Brand</li> <li>- Flavor</li> <li>- Package</li> <li>- Product</li> </ul> <p>This field is populated by the product level selected in the product assortment template and isn't editable.</p>
Category	Category of a product.

5. Enter the assignment's validity period.
6. Click **Add Products**.
7. Save your changes.

### Add a Customer to an Assortment

To make an assortment available to a customer, add the customer to the assortment.

1. From App Launcher, find and select **Assortments**.
2. Select an assortment.
3. In the Store Assortment related list, click **Add**.
4. Search for and add the required retail store, store group, or account.
5. Select the start date from which the association is applicable.
6. Select the end date from which the association is no longer valid.
7. Save your changes.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

#### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Create a Listing Module

To meet the various assortment needs of a customer with an assortment, create a listing module. For every module, you can define target values for price and facings for each product of the assortment.

1. From the App Launcher, find and select **Product Assortments**.
2. Select a product assortment.
3. From the Listing Modules related list, click **New**.
4. Select a listing module, and then add a value for sort.
5. Save your changes.

## Create a Listing Classification

To add a listing module to an account, create a listing classification. Order disposal lists and preset values for surveys are determined based on this assignment.

 **Example:** To create listing classifications, see [Create Listing Classifications](#).

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User

## Assign Order Templates to Product Assortments

For sales document assortments, assign order templates to an assortment. When reps create an order by using this order template, the products of the assortment are available in the order disposal list.

1. From the App Launcher, find and select **Product Assortments**.
2. Select a product assortment.
3. From the Product Assortment Order Templates related list, click **New**.
4. Select an order template, and then save your changes.

## Manage Product Assortments

If you use the Consumer Goods Winter '22 data model or earlier, you can only create an assortment, add products to an assortment, and associate the assortment with a store. When an assortment is associated with a store, it's referred to as store assortment. Products from a store assortment are available to order when an order is created for the store. We recommend that you associate an assortment at the store group level. If you have an assortment at the store group level and another assortment at the store level, the store level assortment takes precedence.

### [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 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.

### [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.

### [Add Product Categories to an Assortment](#)

You can add one or more categories to product assortment lists. Ensure that the categories are from the same sales org as the product assortment template. Only one product assortment list can exist for each customer-category combination.

## 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 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.

1. From the App Launcher, find and open **Product Assortments**.
2. Select the required assortment.
3. From the Accounts, Stores, Store Groups related list, click **Add**.
4. Search for and add the required retail store, store group, or account.


### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To assign order template to product assortment:

- Consumer Goods Cloud User

5. Select the date from which the association is applicable.
6. (Optional) Select the date from which the association is no longer valid.
  -  **Note:** When you add a product to a store, you can save the assignment even if the start date is after the end date.
7. Save your changes.

## 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.

1. From the App Launcher, find and open **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**.

## Add Product Categories to an Assortment

You can add one or more categories to product assortment lists. Ensure that the categories are from the same sales org as the product assortment template. Only one product assortment list can exist for each customer-category combination.

1. From App Launcher, find and select **Product Assortments**.
2. Select an assortment.
3. In the Product Assortment Categories related list, click **New**.
4. Select a product, and then save your changes.

### EDITIONS

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

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- Consumer Goods Cloud User



## Edit Products of an Assortment

Edit and manage product assortments efficiently. You can edit multiple products and up to 5,500 fields in the products grid at a time.

- The validity of each product must be within the validity period of the product assortment.
  - Two similar products can't be active at the same time within the same time frame.
  - Assortment products can be accessed by changing the page layout for the Assortment object.
1. From the App Launcher, find and select **Assortments**.
  2. Select an assortment.
  3. On the Products tab, click **Edit**.
  4. Make the appropriate changes to the validity, size, price, or facing for products in the selected assortment.
  5. Save your changes.

SEE ALSO:

[Salesforce Help: Page Layout Changes for Product and Assortment](#)

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customer conditions:

- CGCloud Sales User

## Visit Execution

Execute visits by performing tasks such as 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.

Use one of these apps to execute your visits:

- Consumer Goods Visit Execution App
- Consumer Goods Mobile App
- Consumer Goods Cloud Offline Mobile App

### [Consumer Goods Visit Execution App](#)

The new Consumer Goods Visit Execution app lets your reps perform all visit execution tasks without physically visiting stores. You can access all visit execution mobile capabilities on a desktop to monitor and engage your stores virtually. You can't scan a product in the app. Also, for the Place Order task, the Confirm button is disabled.

### [Consumer Goods Mobile App](#)

The Salesforce Consumer Goods 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.

### [Getting Started with the Consumer Goods Cloud Offline Mobile App](#)

The Consumer Goods Cloud offline mobile app lets you record data while executing visits even when you're offline. You can sync your mobile device with data from Salesforce anytime you want. Data that you enter on your device is uploaded to Salesforce during background sync.

### EDITIONS

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

## Consumer Goods Visit Execution App

The new Consumer Goods Visit Execution app lets your reps perform all visit execution tasks without physically visiting stores. You can access all visit execution mobile capabilities on a desktop to monitor and engage your stores virtually. You can't scan a product in the app. Also, for the Place Order task, the Confirm button is disabled.

You can't complete a task using the Consumer Goods Visit Execution app if the task is KPI-based and KPIs aren't maintained for the task. The status of these tasks reset to Not Started.

### EDITIONS

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

## Consumer Goods Mobile App

The Salesforce Consumer Goods 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 **Professional, 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.

### Create a Task

While on a visit, if a rep identifies an opportunity to service a store but the task isn't assigned to them, they can create a task.

### Inventory Checks

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

### Planogram Checks

Use planograms to track how your products appear to consumers on a shelf and to understand the share-of-shelf percentage of your products at specific in-store locations. Planogram tasks are assigned to a visit by using the action plan template with one or more Retail Store KPIs assigned to a planogram check task.

### 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.

### Check Inventory a Your Vehicle

Delivery reps can check inventory available in the vehicle that's assigned to them.

[Perform a Signature Task](#)

Capture a signature from a store manager during a visit.

[Delivery Task](#)

Delivery the shipments to stores and update the actual delivered quantities.

[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, your device must meet a few requirements.

[Key Terms to Remember](#)

To get familiar with the app, review the terms.

## Prerequisites

To get the most out of your Salesforce mobile app, your device must meet a few requirements.

Check that your device meets the following 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](#).

## Key Terms to Remember

To get familiar with the app, review the terms.

### Actual Value

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

### 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.

### Assortment

A collection of products.

### 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.

### Inventory Check

### EDITIONS

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

### EDITIONS

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

### EDITIONS

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

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

**In-Store Location**

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

**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.

**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.

**Planogram Check**

You can click and upload an image of the in-store location and capture the quantity and the number of facings of a product at an in-store location.

**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.

**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.

**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.

**Target Value**

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

**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.

**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 identify areas for improvement.

## 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 Consumer Goods App on Your Mobile](#)

Stay organized with the Consumer Goods mobile app and have all the data you need for your visit at one place. You can visually scan the visit list to identify the high priority visits, visit time, visit sequence, and more.

### EDITIONS

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

[Start a Visit](#)

The Visits page shows all assigned visits. And you can create visits.

[What Notes Can You Take?](#)

You can take notes at two levels: the overall visit level or the store level.

[Check Out the Overview Tab](#)

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

[Create a Visit](#)

When there is a need at a store and you don't have any visits scheduled to the store, you can create a visit.

## Launch the Consumer Goods App on Your Mobile

Stay organized with the Consumer Goods mobile app and have all the data you need for your visit at one place. You can visually scan the visit list to identify the high priority visits, visit time, visit sequence, and more.

1. In your Salesforce mobile app, tap **Menu**, tap **App Launcher**, and then tap **Consumer Goods**.
2. Tap the Retail Execution app.

The page with the list of scheduled visits appears. In this page, you can see:

- All the visits assigned to you for the day. Salesforce Maps sequences the visits.
- The number of high-priority visits, store addresses, and the expected times for visiting a store.
- The location of the stores in the embedded map, if your manager has set up maps and addresses.
- The **Call** icon to contact the store manager.

3. Review the visit list. Data points such as visit completion status and the visit priority determined by your manager help in visually scanning the list. You can filter the list by date, priority, and status. You can also sort the list by date and time, optimized route, or priority.

 **Note:** The visit list may take sometime to load if you sort your visit list by optimized route.

4. To view details and get started, tap the required visit.

## Start a Visit

The Visits page shows all assigned visits. And you can create visits.

To start a visit, tap the visit. A visit's home page shows this information.

**Tasks:** View the list of tasks assigned to you for a particular store. The tasks are sequenced by your sales manager. 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.

**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.

### EDITIONS

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

### EDITIONS

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

 **Note:** Visit status isn't editable. The visit status value is determined by the start and end actions of a visit.

## What Notes Can You Take?

You can take notes at two levels: the overall visit level or the store level.

You can see all associated notes on the **Notes** tab of a visit. You can also take notes for each task and can easily identify the task notes by the task name associated with it.

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

Click **More** at the top of the page and then click **New Notes** to take fresh notes.

### EDITIONS

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

## 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

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

### Account Details

Details of the account the store belongs to.

### EDITIONS

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

## Create a Visit

When there is a need at a store and you don't have any visits scheduled to the store, you can create a visit.

1. On the Visit home page, click **+**.
2. Enter the visit details such as the place to visit, state and end date, start and end time, and the purpose of the visit. Then click **Next**.
3. Enter the details of the participants involved. Then click **Next**.
4. Select an action plan template. Click **Save**.

### EDITIONS

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

### USER PERMISSIONS

To create a visit:

- Run Flows

## Create a Task

While on a visit, if a rep identifies an opportunity to service a store but the task isn't assigned to them, they can create a task.

1. On the **Visit** list page, click a visit.
2. Click **Menu** on the top right and click **Add a Task**.  
All the recent action plan templates that were used for the store are displayed.
3. In Templates, search and select an action plan template.  
All the tasks that are associated with the selected action plan template are displayed with their type, name, and associated assessment indicators.
4. Select the required tasks.  
You can select more than one task. If you already have an inventory, planogram, or promotion tasks in your task list, you can add another task of the same type. But if you already have an in-store survey or place order task in your task list, you can't add another task of the same type.
5. Save your changes.  
You can see the newly added tasks below the previously added tasks in the task list. Perform the task like the other tasks that were assigned to you for the visit.

### EDITIONS

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


### USER PERMISSIONS

To create a task

- Create permission on Assessment task

## 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.

### EDITIONS

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

## 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 by setting the filter to **All Locations** to check for an individual product or product category. Use the search or scan barcode option to find a specific product.
  3. For each product or product category, you can see the associated assessment indicator with its corresponding target values, if any. As you capture the actual values against a product or product category'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. To attach a file, under **All Files** click **Upload Files** and select the file you want to attach.
  5. 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.

### EDITIONS

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

## Planogram Checks

Use planograms to track how your products appear to consumers on a shelf and to understand the share-of-shelf percentage of your products at specific in-store locations. Planogram tasks are assigned to a visit by using the action plan template with one or more Retail Store KPIs assigned to a planogram check task.

-  **Note:** You can see a planogram task only if your manager associates an action plan template with your visit.

### [Examine the Planogram Details](#)

View the list of planograms to analyze the planograms to be checked by the sales rep during a store visit.

### [Upload an Image for the Planogram Task](#)

Upload images of products from in-store locations, compare the image with the reference planogram, and audit the differences during visit execution.

### [Complete a Planogram Task](#)

Review and complete the planogram check task during visit execution.

### EDITIONS

Available in: Lightning Experience in **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled

## Examine the Planogram Details

View the list of planograms to analyze the planograms to be checked by the sales rep during a store visit.

Associate a planogram image with the in-store location and associate an Action Plan Template and RS KPIs with the visit.

1. Under Tasks, select the planogram check item.
2. To view the planogram details, select the planogram task on the Assessment task page.
3. To view the list of products in the planogram and the reference image, select **Product Details**.

### EDITIONS

Available in: Lightning Experience in **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled



- To capture non-product KPIs, such as store level and task level KPIs that aren't associated with a particular product, select **Planogram Compliance**.

For example, you can see if the banners are placed correctly.

SEE ALSO:

[Add an Image](#)

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

## Upload an Image for the Planogram Task

Upload images of products from in-store locations, compare the image with the reference planogram, and audit the differences during visit execution.

 **Note:** Image upload for a planogram task is optional.

- Under Tasks, select the planogram check task.
- Select the planogram task on the Assessment task page, and then click **Take Photo**.
- Select the relevant image, and click **Done**.

## Complete a Planogram Task

Review and complete the planogram check task during visit execution.


- Under Tasks, select the planogram check task.
- Select the planogram task on the Assessment task page, and click **Review**.
- Provide the values for the planogram KPIs defined, and click **Confirm**.

The progress ring indicates the completion status for the planogram task.

Provide task-level KPIs, if any.

## 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.

### EDITIONS

Available in: Lightning Experience in **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled

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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

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.

### EDITIONS

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

### EDITIONS

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

## 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

As a field rep, create orders to ensure that your products are always available at store shelves. You can create orders from the **Tasks** tab.

## 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.

## Create an Order

As a field rep, create orders to ensure that your products are always available at store shelves. 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. Do one of the following:
  - Tap **Add All Products to Cart**.
  -  **Note:** The maximum number of products that you can add at a time is 200.
  - To order only those products that your manager marked as favorites, tap **Show Favorites**.
  - To look for a specific product, tap **Search** or **Scan** at the top of the screen.
3. 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.
4. Review the cart and verify the quantity, product value, and total order value.
5. 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**.

### EDITIONS

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

### EDITIONS


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

### EDITIONS

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

## 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.

## 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.

## 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.

## 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.

### EDITIONS

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

### EDITIONS

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

### EDITIONS

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

### EDITIONS

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

## Check Inventory a Your Vehicle

Delivery reps can check inventory available in the vehicle that's assigned to them.

1. In your Salesforce mobile app, tap **Menu**, tap **App Launcher**, and then tap **Consumer Goods**.
2. Tap **Vehicle Inventory**.

 **Note:** If you don't see the **Vehicle Inventory** tab, click **Menu**, then click **Edit** for **Consumer Goods**, and then drag **Vehicle Inventory** on to the top of the page.

You can see the inventory that's available in your vehicle.

### EDITIONS

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

## Perform a Signature Task

Capture a signature from a store manager during a visit.

1. Under **Tasks**, tap the signature task item.
2. Capture the signature, and click **Submit**.
3. To add another signature, click **Add Signature**.

### EDITIONS

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

## Delivery Task

Delivery the shipments to stores and update the actual delivered quantities.

### [Perform an Delivery Task](#)

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


### EDITIONS

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


## Perform an Delivery Task

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

1. Under **Tasks**, tap the delivery task item.
2. Select the shipment to deliver.  
You can see a partial list of products to deliver. To see the complete list, click **View More**.
3. Update the delivery quantities for the products for which the delivered quantities is less than ordered quantity.

 **Note:** You can't enter a negative value or a value that's more than the ordered quantity.

4. Click **Delivered**.

 **Note:** If a product is delivered to the store for the first time, your response may take a few seconds to get recorded.

After you have completed the delivery, the delivery task item under **Tasks** is marked as **Complete**. You can continue with the other tasks that are assigned to you.

### EDITIONS

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

### USER PERMISSIONS


To use delivery task

- Lightning Direct Store Delivery

## 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**.

 **Note:** Visit status isn't editable. The visit status value is determined by the start and end actions of a visit.

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

### EDITIONS

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

## Getting Started with the Consumer Goods Cloud Offline Mobile App

The Consumer Goods Cloud offline mobile app lets you record data while executing visits even when you're offline. You can sync your mobile device with data from Salesforce anytime you want. Data that you enter on your device is uploaded to Salesforce during background sync.

### [Why Do You Need the App?](#)

Consumer Goods Cloud offline mobile app is an intuitive mobile solution that can be used with iOS and Android phones and tablets. The app offers enhanced mobility with real-time visibility and offline and online capabilities.

### [Install the Consumer Goods Cloud Offline Mobile App](#)

Before installing, ensure that your device is compatible with the app.

### [Set Up Your Landing Page and Personalize Your Settings](#)

After you install the Consumer Goods offline mobile app, you can decide the look of your landing page. Based on your usage needs, your admin can assign and create cards for the User and Store cockpits. Based on the admin's configuration, you can access the base, advanced, or both base and advanced features. Your admin can also include both the base and advanced features in the cockpit. You can also personalize the display options for the Consumer Goods Offline mobile app.

### [Understand the Consumer Goods Cloud Offline Mobile App](#)

Use the Consumer Goods Cloud offline mobile app to seamlessly perform retail activities even at stores with poor internet connections. Get quick access to everything you need during a visit, even without connectivity. The app UI design is cockpit-based and the app's cockpits are called User cockpit and the Retail Store cockpit. Each cockpit has sections called cards.

### [Use the Consumer Goods Cloud Offline Mobile App](#)

When you open the app, the data is available on the app as configured by your admin. To log in to the app, if you've set a security PIN, enter the PIN.

## Why Do You Need the App?

Consumer Goods Cloud offline mobile app is an intuitive mobile solution that can be used with iOS and Android phones and tablets. The app offers enhanced mobility with real-time visibility and offline and online capabilities.

Benefits of the app include:

- Integrated route planning using GPS and map support.
- Support for different service delivery models in different geographies.
- Easy-to-use features including process-guided navigation and data entry.
- Process-driven usability.
- Laser-based barcode scanning to improve efficiency.
- Intelligent handling of high data volumes for offline devices that in turn support critical business processes.
- Execution of complex business processes offline, supported by background sync, and sophisticated trace and monitoring options.
- Theming capabilities to create custom themes that reflect your brand.
- Cockpit-based UI:
  - User cockpit: Provides review information about your visits and sync status. This is the default landing page and is also known as Your Day.
  - Retail Store cockpit: Provides a 360° view of a store and visit-related information with in-store live reporting. This is a single point of access for all visit activities.

### EDITIONS

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

## Install the Consumer Goods Cloud Offline Mobile App

Before installing, ensure that your device is compatible with the app.

### [Requirements for Installing the Consumer Goods Cloud Offline Mobile App](#)

See the minimum operating system and device requirements for installing the mobile app.

### [Install the Consumer Goods Cloud Offline Mobile App](#)

You can install the Consumer Goods Cloud offline mobile app on mobile phones or tablets.

### [Requirements for Using a Bluetooth Scanner](#)

You can use bluetooth barcode scanners with the Consumer Goods Cloud offline mobile app to enter orders, identify assets, and so on.

## Requirements for Installing the Consumer Goods Cloud Offline Mobile App

See the minimum operating system and device requirements for installing the mobile app.

### Mobile Platform Requirements


The Consumer Goods Cloud offline mobile app is supported on phones and tablets that meet these mobile platform requirements.

Operating System	Version
Android	10, 11, 12, and 13

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud

Operating System	Version
iOS	17.2

 **Note:** For iOS and iPadOS, compatibility information is updated within 14 days after each official major iOS or iPadOS release. If the new version isn't compatible or compatibility verification for the version isn't possible within 14 days, then compatibility information is updated with the identified issues, technical information, and possible workarounds.

## Devices Tested

Salesforce performs automated and manual testing of the Consumer Goods Cloud offline mobile app for iOS and Android on selected devices.

Platform	Devices Tested with Earlier Operating System Versions	Devices Tested with the Latest Operating System Version
Android	<ul style="list-style-type: none"> <li>• Samsung Galaxy S8</li> <li>• Samsung Galaxy Tab A7</li> </ul>	<ul style="list-style-type: none"> <li>• Samsung Galaxy Note8</li> <li>• Samsung Galaxy S21</li> <li>• Samsung Galaxy Tab S7</li> </ul>
iOS	<ul style="list-style-type: none"> <li>• iPhone 11</li> <li>• iPad Air Second Generation</li> </ul>	<ul style="list-style-type: none"> <li>• iPhone 12</li> <li>• iPad Air Fourth Generation</li> <li>• iPad Mini5</li> </ul>

Consider using other devices, as long as they meet the minimum current operating system requirements. Salesforce, however, recommends that customers apply additional tests of their chosen devices, including performance, security, and compatibility checks, before they use those devices in production. Specifically on Android, there can always be manufacturer-specific customizations that interfere with mobile apps. Salesforce isn't able to replicate some issues for customers using the mobile app on untested devices or due to manufacturer-specific customizations.

Mobile operating systems reorganize and even close background apps to optimize memory consumption and keep the operating system performing at acceptable levels. The CG Cloud offline mobile app is supported only on mobile devices with 4 GB RAM or more. To use the app uninterrupted, ensure that your mobile device has enough memory to support the app.

## Install the Consumer Goods Cloud Offline Mobile App

You can install the Consumer Goods Cloud offline mobile app on mobile phones or tablets.

1. Get the QR code for the app from your admin.
2. Search for and download the app to your mobile device.  
Download from App Store if you've an iOS device and from Google Play Store if you've an Android device.
3. Scan the QR code that your admin provided.
4. Log in with your user ID and password.

### EDITIONS

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



**!** **Important:** To log in into a sandbox org, ensure that the QR code shared by the administrator includes the custom domain name. If you have the consumer key, you will still need the custom domain name to enter during login. The login screen appears if you don't use a QR code.

The content and the package start downloading.

5. If you're asked to, enter a security pin.  
You can now access the app from your device.

If you get an error while downloading the content or the package, exit the app and try again. If the issue persists, contact your admin.

## Requirements for Using a Bluetooth Scanner

You can use bluetooth barcode scanners with the Consumer Goods Cloud offline mobile app to enter orders, identify assets, and so on.

To use a laser scanner with the app, you need:

- A compliant virtual keyboard
- An operating system-compliant chipset for bluetooth connectivity
- A configurable prefix
- A configurable postfix

The Zebra CS6080 bluetooth scanner has been tested and verified for use with the Consumer Goods Cloud offline mobile app.


For instructions on setting up and pairing your scanner with the Consumer Goods Cloud offline mobile app, see the scanner documentation. For support and configuration-related queries about your scanner, contact the vendor of the scanning device.

SEE ALSO:

[Salesforce Help: Supported Barcodes](#)

## Set Up Your Landing Page and Personalize Your Settings

After you install the Consumer Goods offline mobile app, you can decide the look of your landing page. Based on your usage needs, your admin can assign and create cards for the User and Store cockpits. Based on the admin's configuration, you can access the base, advanced, or both base and advanced features. Your admin can also include both the base and advanced features in the cockpit. You can also personalize the display options for the Consumer Goods Offline mobile app.

1. From the Consumer Goods Cloud offline mobile app, tap .
2. Tap **My Settings**.
3. From the Landing Page dropdown list, select one of the options as the landing page.
  - **Main Menu:** Access both the base and advanced options. This option is limited for developing and testing the Consumer Goods Cloud offline mobile app. We recommend that you don't select this option as the landing page.
  - **User Cockpit:** Access the base features. Select this option if your project uses the base model of the Consumer Goods Cloud offline mobile app.
  - **Advanced User Cockpit:** Access the advanced features. Select this option if your project uses the advanced model of the Consumer Goods Cloud offline mobile app.
4. Relaunch the app.

### EDITIONS

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

### EDITIONS


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

### USER PERMISSIONS

To personalize your settings:

- Consumer Goods Cloud User

5. To personalize the display options for the app, on the Calendar and Theme tab, enter these details.

Field	Description
Visit Type	
Default Visit Type	Default visit type that the system assigned to you.
Call Calendar	
Initial Time	Initial time of your roster.
Standard Layout	Shows the agenda. The options include: <ul style="list-style-type: none"> <li>• Daily agenda with map: Shows the daily view with a map, which shows visit locations for the selected day.</li> <li>• Weekly agenda: Shows the weekly view.</li> </ul>
Visit filter	Condition to show visits in the agenda. The options are: <ul style="list-style-type: none"> <li>• All: Shows all customer visits.</li> <li>• Open: Shows ongoing customer visits.</li> </ul>
Show Calendar Week	Shows the current week in the calendar.
Display Weekend	Shows the current weekend in the calendar.
Calendar Map Settings	
Display Traffic	Shows traffic conditions in real time.
Display Route	Shows the route between two locations.
Camera Settings	
Picture Profile	Defines the user-specific resolution and quality of the pictures that you captured on a mobile device during a store visit. The options are: <ul style="list-style-type: none"> <li>• Small</li> <li>• Medium</li> <li>• M-Large</li> <li>• H-Large</li> </ul>
Theme tab	Theme of your app. <p> <b>Note:</b> To apply the new theme, restart your mobile device.</p>

6. To save your changes, tap **Back**.

#### Picture Quality Resolution

Each picture quality value consists of three numeric values that are concatenated with a dash.

## Picture Quality Resolution

Each picture quality value consists of three numeric values that are concatenated with a dash.

For example, the picture quality value is 2048-1536-90. Here's the description of the numeric values.

Picture Quality Value	Stands for
2048 px	Maximum width in pixel.
1536 px	Maximum height in pixel.
90	Percentage of compression quality.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

If you capture an image in landscape mode with the picture quality value as 2048-1536-90, then it results in a 2048 x 1536 pixel image with 90% JPG compression quality. If you capture an image in portrait mode with the picture quality value as 2048-1536-90, then then it results in a 1152 x 1536 pixel image with 90% JPG compression quality. Here's the summary of the details.

Picture Quality	Configured Value	Actual Value in Landscape Mode	Actual Value in Portrait Mode
Small	1024-768-80	1024-768	576-768
Medium	1440-1080-80	1440-1080	810-1080
M-Large	2048-1536-80	2048-1536	1152-1536
H-Large	2048-1536-90	2048-1536	1152-1536

## Understand the Consumer Goods Cloud Offline Mobile App

Use the Consumer Goods Cloud offline mobile app to seamlessly perform retail activities even at stores with poor internet connections. Get quick access to everything you need during a visit, even without connectivity. The app UI design is cockpit-based and the app's cockpits are called User cockpit and the Retail Store cockpit. Each cockpit has sections called cards.

### [Tour the Consumer Goods Cloud Offline Mobile App](#)

Before you start using the app, take a tour of the Consumer Goods Cloud offline mobile app. Based on your selected preference, you can see one of these landing pages: Main Menu, User Cockpit, and Advanced User Cockpit.

### [Visit Calendar Page](#)

To perform activities related to a visit, use the Visit Calendar page. By default, the visit calendar page shows the weekly view.

### [Reports](#)

Reports give detailed insights about your customers as tables and graphs. You can view information such as a customer's sales figures or promotions that are created for a customer by tapping the Reports tile on the main menu. The overview lists the relevant reports for the logged-in user.

## Tour the Consumer Goods Cloud Offline Mobile App

Before you start using the app, take a tour of the Consumer Goods Cloud offline mobile app. Based on your selected preference, you can see one of these landing pages: Main Menu, User Cockpit, and Advanced User Cockpit.

To access the app on mobile phones or tablets, ensure that your device is compatible, and then install the Consumer Goods Cloud offline mobile app. See [Install the Consumer Goods Cloud Offline Mobile App](#) on page 123.

### [Base and Enhanced Data Models](#)

The Consumer Goods Cloud offline mobile app is designed as a group of cockpits, which are dashboards that group information in sections called cards. Use the features, sectioned as cards, to access all your features and reports in one place.

### [Consumer Goods Cloud Offline Mobile App for Base Data Model](#)

Base Data Model includes retail execution features, such as performing inventory tasks and creating orders.

### [Consumer Goods Cloud Offline Mobile App for Enhanced Data Model](#)

Enhanced Data Model includes user cockpit features, such as advanced orders and advanced promotions.

#### EDITIONS

Available in: Lightning Experience in **Professional, Unlimited, and Enterprise** Editions that have Consumer Goods Cloud enabled

## Base and Enhanced Data Models

The Consumer Goods Cloud offline mobile app is designed as a group of cockpits, which are dashboards that group information in sections called cards. Use the features, sectioned as cards, to access all your features and reports in one place.

You can use the Consumer Goods Cloud offline mobile app with the Base or the Enhanced data model. The app with Base Data Model shows the user cockpit for all users in a project based on the base data model. The app with Enhanced Data Model shows the user and store cockpit for all users in a project based on the enhanced data model. Let's look at how sales teams can benefit from these data models.

#### EDITIONS

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

**Table 1: Base Vs Enhanced**

Features	Base Data Model	Enhanced Data Model
Cockpits	<ul style="list-style-type: none"> <li>User Cockpit</li> <li>Retail Store Cockpit</li> </ul>	<ul style="list-style-type: none"> <li>User Cockpit</li> <li>Store Cockpit</li> </ul>
Execute preplanned visits with inventory and custom assessment tasks	✓	—
Map based planning	—	✓
Account receivables	—	✓
Creation of followup visits	—	✓
Mobile links	—	✓
CRM Analytics links	—	✓
Overdue customers	—	✓
Customer Sales report	—	✓

Features	Base Data Model	Enhanced Data Model
Notifications	—	✓
Tasks and Customer Tasks	—	✓
Plan offline visits	—	✓
Plan job lists	—	✓
Track assets	—	✓
Track assets with GPS	—	✓
Execute orders	—	✓
Collect and record payments for orders	—	✓
Sell-in promotions	—	✓
Sell-in promotional displays via Sales Folder	—	✓
View Visit Rate and Unsuccessful Visits reports	—	✓
Gamification driven activity performance review	—	✓
Advanced activities with conditional questions	—	✓
Calculate accurate prices for orders with Penny Perfect Pricing	—	✓
Customer Master review	✓	✓
Pictures	✓	✓
Visit Calendar	✓	✓
Sync status	✓	✓
Use bluetooth barcode scanners	✓	✓
Ad-hoc visit creation	—	✓

### Consumer Goods Cloud Offline Mobile App for Base Data Model

Base Data Model includes retail execution features, such as performing inventory tasks and creating orders.

The Consumer Goods Cloud offline mobile app for Base Data Model App has two cockpits:

- User Cockpit: Access all visit-related information in one place. Review information about visits and sync status in this cockpit.
- Retail Store Cockpit: View information related to the retail store, get visit details, and view the tasks related to the visits.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled

### User Cockpit for Base Data Model

User Cockpit, also known as Your Day, helps you stay organized while you perform your basic field activities. Access information about your visits and automatically sync your mobile device with the data from Salesforce and vice versa. Perform inventory tasks and create orders.

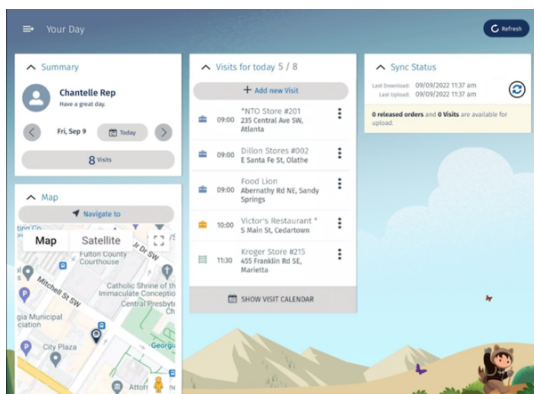
### Retail Store Cockpit for Base Data Model

Retail Store Cockpits for Base Data Model show planned visits and tasks, in the form of cards.

### User Cockpit for Base Data Model

User Cockpit, also known as Your Day, helps you stay organized while you perform your basic field activities. Access information about your visits and automatically sync your mobile device with the data from Salesforce and vice versa. Perform inventory tasks and create orders.

This image shows how the User Cockpit for the Base Data Model is organized with cards.



This table lists the cards of a User Cockpit for a base data model.

Card	Description
Summary	View your name, picture, and the number of open visits for a selected date.
Visits for Today	View the list of planned and in-progress visits scheduled for the day selected on the Summary card. To see scheduled visits for the week, tap <b>Show Visit Calendar</b> . Tap ⓘ and see the daily view, all visits, and only the open visits.
Sync Status	View the last download and upload timestamp of data sync between Salesforce and your mobile device. This card also shows the number of released orders and visits where data is available for upload. To sync the latest data, tap 🔄. To see user notifications, click <b>Refresh</b> after the sync.
Map	See the map of your visit location. Tap ⓘ and see the daily view, all visits, and only the open visits.

For more options such as view the order history, execute, cancel, delete, and copy the orders, customize app settings, and get information about the app, tap ☰. This table lists the additional options.

### EDITIONS

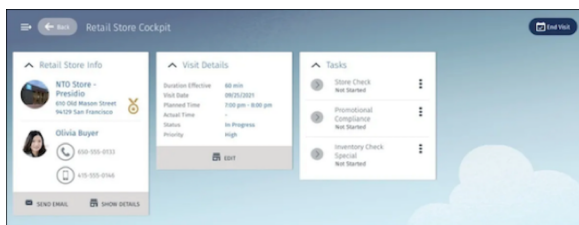
Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled

Option	Description
Order	<p>Understand the customer's order behavior by viewing the customer's orders, both open and released. Execute, cancel, delete, and copy your open orders. Create orders during store visits based on various order types, such as:</p> <ul style="list-style-type: none"> <li>• Standard Order: Created for advance orders. The system automatically calculates the order values when you enter the product quantity</li> <li>• Direct Order: Created when you visit a store. The order values are calculated based on the order templates.</li> <li>• Advertising Material: Created for advertising materials.</li> <li>• Returns: Created to handle product returns.</li> <li>• Free Goods: Created for free items.</li> <li>• Special Orders: Created for products used in promotions.</li> </ul>
My Settings	Choose your landing page, and review your calendar and theme settings. See <a href="#">Personalize Your Settings</a> on page 125.
About	Read and copy the support and license information, and the app license agreement terms.
Logout	Log out of the app.

### Retail Store Cockpit for Base Data Model

Retail Store Cockpits for Base Data Model show planned visits and tasks, in the form of cards.

This image shows the Retail Store Cockpit for a base data model.



This table describes the cards of the Retail Store Cockpit for a base data model.

Card	Description
Retail Store Info	<p>View the store name, address, store image, and badges that determine the customer priority. Also, view the image and phone numbers of the store manager.</p> <ul style="list-style-type: none"> <li>• To send an email to the store manager, tap <b>Send Email</b>.</li> <li>• To view detailed store information, tap <b>Show Details</b>.</li> </ul>
Visit Details	View the visit duration, planned visit time, actual start time, priority, and status of the visit. To edit the visit information, tap <b>Edit</b> .
Tasks	View the open tasks associated with the visit. The app supports inventory check and other custom tasks.

### EDITIONS

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

## Consumer Goods Cloud Offline Mobile App for Enhanced Data Model

Enhanced Data Model includes user cockpit features, such as advanced orders and advanced promotions.

The app has two cockpits.

- **User Cockpit:** Access relevant information so that a sales rep can prepare for and execute visits. Based on the access that your admin provides for you, you can plan your visits, activities, tasks, and customer tasks. You can also view customer sales reports and CRM analytics and get notifications and map guidance on your visits.
- **Store Cockpit:** Perform visit-specific activities such as live store check, create order, and track assets. View customer details and tasks, store events, and order history, and create follow-up visits for your customers. You can also introduce sell-in promotions and view promotional displays with the Sales Folder.

### [Advanced User Cockpit for Enhanced Data Model](#)

Advanced User Cockpit helps you stay organized while you perform your field activities. This cockpit shows the user cockpit for all users in a project based on the advanced model. Plan your visits, activities, tasks, customer tasks, and notifications. Get map guidance on your visits and view customer sales reports. View your CRM analytics and launch any third-party application without navigating away from the app. Automatically sync the data between your mobile device and Salesforce, and do a lot more.

### [Store Cockpit for Enhanced Data Model](#)

Store Cockpits show visit-related information with in-store live reporting and serves as a single point of access for visit activities. As a supervisor, get a complete view of a customer and use this information to plan visits and review sales and compliance. As a sales rep, use this information to interact with store managers and understand store requirements.

### [Main Menu for Enhanced Data Model](#)

Use the main menu to develop and test the Consumer Goods Cloud offline mobile app. For the landing page, we recommend that you select User Cockpit or Advanced User Cockpit.

## Advanced User Cockpit for Enhanced Data Model

Advanced User Cockpit helps you stay organized while you perform your field activities. This cockpit shows the user cockpit for all users in a project based on the advanced model. Plan your visits, activities, tasks, customer tasks, and notifications. Get map guidance on your visits and view customer sales reports. View your CRM analytics and launch any third-party application without navigating away from the app. Automatically sync the data between your mobile device and Salesforce, and do a lot more.

This image shows how the Advanced User Cockpit is organized with cards.

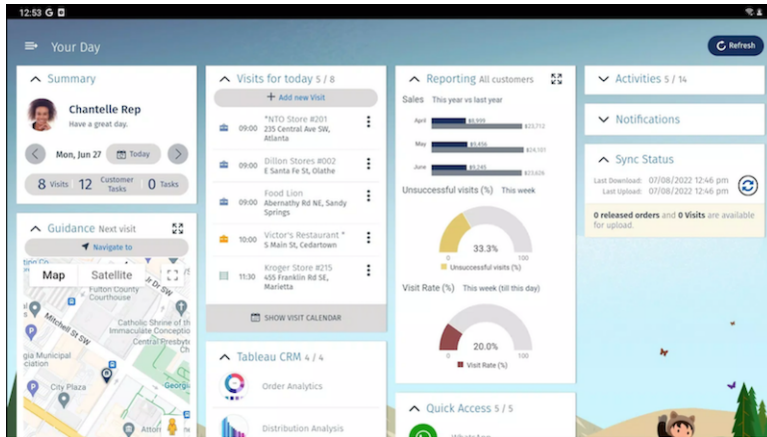
### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).

### EDITIONS


Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).






This table describes the cards in an Advanced User Cockpit for an enhanced data model.

Card	Description
Summary	View your name, picture, number of open visits, your tasks for the day, customer tasks, and the number of open visits for a selected date.
Visits for Today	View the list of planned and in-progress visits scheduled for the day that was selected on the Summary card. View the visit details, execute, complete, cancel, reschedule, or delete a visit, and navigate to the store related to the visit. You can delete visits, except completed visits, if <b>Delete Allowed</b> is selected in the visit template.
Reporting	Get insights about your customer in a snapshot. View the customer's sales and monitor three months' sales data comparing last year's sales with the current year's sales, graphs illustrating unsuccessful visits, and visit rate.
Activities	View all the standard and event-driven activities related to the customer. Example for a standard activity: Standard Contract Compliance.
Guidance	See the map of your next visit location. To see a list of all your planned visits for a selected day, tap <b>Show Tour</b> . Execute, complete, cancel, reschedule, or delete any of your visits, and navigate to the store related to the visit. You can also search for customers by specifying a starting point, and navigate to their location.
CRM Analytics	Get insights into orders, distributions, and customer's top categories. Increase sales, improve store compliance, and identify if the store is at risk.
Quick Access	Launch a third-party app directly from the Consumer Goods offline mobile app.
Notifications	View notifications created by your supervisor. For tablets, this card shows 5 recent unread notifications, and for phones, the card shows 3 recent unread notifications.
Customer Tasks Today	Review customer tasks created by your supervisor or create customer tasks during visits. You can associate a customer and specify a due date for the task. You can also cancel, delete, or copy a task.
Tasks Due Today	Track your day by maintaining a task list for yourself. Create tasks, view, cancel, or delete existing tasks.
Overdue Customers	View the list of customers managed by you, whose service date is past due. The due date is calculated by: Visit Completion date + Visit Frequency * 7. For example, if you select Aug 19, 2022 as the date on your cockpit, this card shows all customers with a visit completion date before Aug 22, 2022.  To remove an overdue visit entry, tap <b>Create Visit</b> , and create the visits.

Card	Description
Sync Status	Shows the last download and upload timestamp of data sync between Salesforce and your mobile device. This card also shows the number of released orders and visits where data is available for upload. Tap  to download and upload the latest data.

To view more options, customize app settings, get information about the app, and log out of the app, from the main menu, tap . This table describes the additional options.

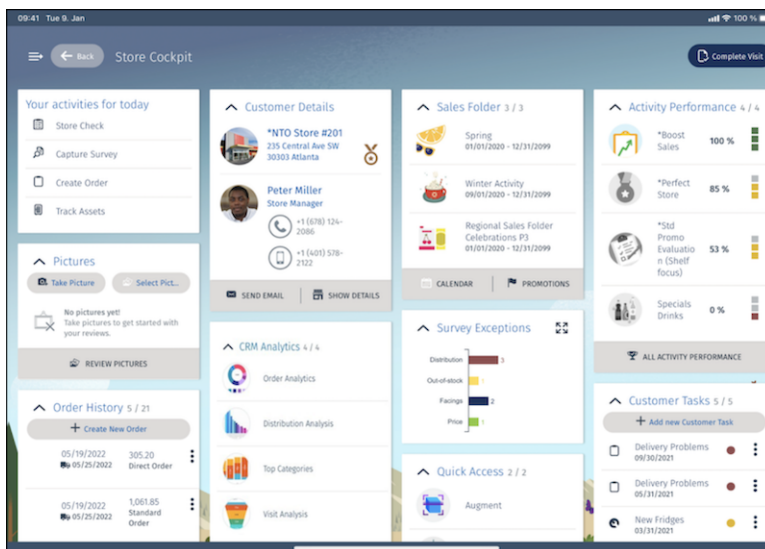
Action	Description
Visit Execution	View the list of planned visits scheduled for the current week.
Customer	<p>Create customers and view the existing customers. Sort the customers list alphabetically or based on the location. Tap a customer to view these details.</p> <ul style="list-style-type: none"> <li>• Store map</li> <li>• Operating hours of the store</li> <li>• Contact details of key store employees</li> <li>• Sales report comparing sales for the previous and current years</li> <li>• Existing Point Of Sale (POS) (You can also assign a new POS)</li> <li>• Details of visits to the store</li> <li>• Roles, relations, and store images</li> </ul>
Product	View your existing product list. Tap a product to view the information about logistics, Bill of Material, and product images.
Order	<p>Understand a customer's order behavior by viewing the customer's orders, both open and released. Execute, cancel, delete, and copy your open orders. Create orders during store visits based on various order types such as:</p> <ul style="list-style-type: none"> <li>• Standard Order: Created for advance orders. The system automatically calculates the order values when the product quantity is entered.</li> <li>• Direct Order: Created when you visit a store. The order values are calculated based on the order templates.</li> <li>• Advertising Material: Created for advertising materials.</li> <li>• Returns: Created to handle product returns.</li> <li>• Free Goods: Created for free items.</li> <li>• Special Orders: Created for products used in promotions.</li> </ul>
Sales Folder	Drive sales by viewing store events where you can sell. From the store events, view the top selling products. Sort your sales folder by customer or by sales type. To view the list of existing promotions, tap <b>Promotions</b> . The Promotions option appears only if the sales folder supports at least one promotion.
Time Card	Add, track, and monitor all your field rep activities by updating your daily reports. Track the productive time spent on visit activities, research, and sales, and downtime spent on breaks, vacation, or private appointments. Approve your timecard entries and change the status to Released, for the entry to be submitted for your supervisor's review.

Action	Description
Reports	View your customer sales and promotion calendar reports. Select a customer and view the sales comparison between the current year and the previous year, and view their calendar with planned promotional events.
Notifications	View notifications created by your supervisor.
Tasks	Prioritize your tasks and stay organized. Create tasks for yourself or act on the active tasks that were assigned to you by your supervisor.
Customer Tasks	Review customer tasks created by your supervisor or create customer tasks during visits. You can associate a customer and specify a due date for the task. You can also cancel, delete, or copy a task.
My Settings	Choose your landing page, and review your calendar and theme settings. See <a href="#">Personalize Your Settings</a> .
About	Read and copy the support and license information, and the app license agreement terms.
Logout	Log out of the app.

### Store Cockpit for Enhanced Data Model

Store Cockpits show visit-related information with in-store live reporting and serves as a single point of access for visit activities. As a supervisor, get a complete view of a customer and use this information to plan visits and review sales and compliance. As a sales rep, use this information to interact with store managers and understand store requirements.

This image shows the cards in Store Cockpit.



This table describes the cards of a Store Cockpit for an enhanced data model.

Card	Description
Your Activities for Today	<p>Click these options and perform the activities related to a task.</p> <ul style="list-style-type: none"> <li>• Store Check: Check the customer store virtually.</li> <li>• Capture Survey: Capture an in-store survey about promotions and discrepancies from store staff and customers. Scan pictures</li> </ul>

### EDITIONS

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Card	Description
	<p>to add new products. Add existing products to the survey. View all products added to the survey and filter products by category.</p> <ul style="list-style-type: none"> <li>• Create Order: This option is displayed only if the visit is completed and the customer doesn't have an existing order. Create standard order, direct order, advertising material, returns, and free goods orders.</li> <li>• Track Assets: Scan barcodes to add assets, view your physically verified assets and non-verified assets by selecting the Only Sighted and Only Not Sighted options, and register assets with serial number.</li> </ul>
Customer Details	<p>Use this card to perform these tasks.</p> <ul style="list-style-type: none"> <li>• View the name, email, and contact details of the customer.</li> <li>• Send an email to the customer.</li> <li>• Tap <b>Show Details</b> to view the customer name, address, email and contact details, customer classification type, status, geographical location, and trade org details.</li> <li>• View these details. <ul style="list-style-type: none"> <li>– Map</li> <li>– Operating hours of the store</li> <li>– Contact details of key store employees</li> <li>– Sales report comparing sales for the previous and current years</li> <li>– Existing Point Of Sale (POS). You can also assign new POS machines.</li> <li>– Details of visits to the store</li> <li>– Roles, relations, and store images</li> </ul> </li> </ul>
Sales Folder	<p>Elevate your sales pitch by viewing the store events where you can pitch and view the top selling products. To view the list of existing promotions, tap <b>Promotions</b>. The Promotions option is displayed only if the sales folder supports at least one promotion.</p>
Activity Performance	<p>Gauge the performance of your activities by viewing the activity scores.</p>
Pictures	<p>Represent the expected shelf display by adding and reviewing existing pictures of products. When reviewing images, you can suggest changes by drawing sketches on the image. Associate tags such as image type and the area where the product is to be displayed. For example, the image type is Shelf and the area is Main Aisle.</p>

Card	Description
CRM Analytics	Get insights on orders, distributions, and customer's top categories. Increase sales, improve store compliance, and identify if the store is at risk.
Survey Exceptions	Stay up to date and analyze how products in the customer's store are performing.
Customer Tasks	Prioritize your tasks and stay organized. Create tasks for yourself or act on open tasks that are assigned by your supervisor. The customer task types are personal tasks, follow-up tasks, and asset-related tasks such as asset installation, maintenance, movement, and retirement. You can cancel, delete, or create copies of customer tasks. See <a href="#">Create Customer Tasks</a> on page 166.
Order History	<p>Get an overview of the customer's past orders and understand the order behavior by reviewing the order history. Create orders during store visits based on these order types.</p> <ul style="list-style-type: none"> <li>• Standard Order: Created for advance orders. The system automatically calculates the order values when product quantity is entered.</li> <li>• Direct Order: Created when you visit a store. The order values are calculated based on the order templates.</li> <li>• Advertising Material: Created for advertising materials.</li> <li>• Returns: Created to handle product returns.</li> <li>• Free Goods: Created for free items.</li> <li>• Special Orders: Created for products used in promotions.</li> </ul> <p>Review these details with the Order History card.</p> <ul style="list-style-type: none"> <li>• Order type.</li> <li>• Order values, order status, and order delivery date. Order status shows whether there was a delayed delivery, order cancellation, or partial delivery. You can use this information to suggest replacement products for the customer to order.</li> <li>• Order item quantities, including ordered products and ordered quantity.</li> <li>• Order discounts, promotions, delivery recipients, or wholesaler information only for indirect orders.</li> <li>• Out of stock products.</li> <li>• Product returns.</li> </ul>
Follow-Up Visits	Create or view planned future visits for the customer. You can also reschedule or delete a follow-up visit.
Quick Access	Launch a third-party app directly from the Consumer Goods offline mobile app.

Card	Description
Visit Notes	Create a note when you visit a customer or view the notes that were recorded during past visits. You can create only one note per visit.
Account Receivables	See customer dues, if any.

### [Access Store Cockpit for Enhanced Data Model](#)

The Store Cockpit provides a 360° view of a store. You can get an overview of the store as if you're physically visiting the store.

### Access Store Cockpit for Enhanced Data Model

The Store Cockpit provides a 360° view of a store. You can get an overview of the store as if you're physically visiting the store.

1. In the User Cockpit for Enhanced Data Model, under the Visits for Today card, tap a visit.
2. To visit the store cockpit of a customer with completed visits, tap **Show Visit Calendar**. From the Visit Calendar, tap any visit, and then tap **Execute**.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).

### Main Menu for Enhanced Data Model

Use the main menu to develop and test the Consumer Goods Cloud offline mobile app. For the landing page, we recommend that you select User Cockpit or Advanced User Cockpit.

This image shows the main menu and both the base and advanced cards.



#### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).


## Visit Calendar Page

To perform activities related to a visit, use the Visit Calendar page. By default, the visit calendar page shows the weekly view.





To plan your visits, use one of these ways:

- From the User Cockpit for Base Data Model or Your Day, tap **Show Visit Calendar**. This view shows the scheduled visits for the week.
- From the Advanced User Cockpit for Enhanced Data Model or Your Day (Adv), tap **Show Visit Calendar**.

This view shows the visit details for the week, and options to execute, complete, cancel, reschedule, or delete a visit, and navigate to the store related to the visit.


- From the Advanced User Cockpit for Enhanced Data Model or Your Day (Adv), tap , and then select **Visit Execution**. This view shows the list of planned visits scheduled for the current week.

You can perform these tasks from the Visit Calendar page:

- To create a visit, tap .
- To choose another date and view visits for that week, tap .
- To view the previous and next weekly visits, use the arrows.
- To perform more actions, tap , and select one of these options.
  - Plan Job Lists: Schedule a visit for a predefined job list. Drag a job from the predefined job list to the visit calendar. For more information, see [Create Visits from Job Lists](#) on page 145.
  - Plan Customers: Allocate visits for multiple customers in bulk. View all your customers and drag any customer to the visit calendar. For more information, see [Manually Plan Visits for Customers](#) on page 144.
  - Automatic Planning: Replicate your current visits to the current week and the subsequent week. For more information, see [Automatic Visit Planning](#) on page 145.
  - Create Trip List: Plan visits based on a predefined sequence of customers. For more information, see [Create Trip Lists](#) on page 147.
  - Update Trip List: Update a trip and edit the description, validity, and day when the trip list is valid.
  - Delete Trip List: Delete an existing trip list.
  - Create Visits Via TripList: Create a visit for an existing list from your trip list. Move any triplist to the visit calendar. For details, see [Trip List-Based Visit Planning](#) on page 146.
  - All Visits: View all visits for the day.
  - Only Planned Visits: View only the planned visits for the day.
  - Set Default Visit Type: Select a visit type that's applied by default when you create a visit. For more information, see [Select a Default Visit Type](#) on page 149.
  - Choose User: View the sales rep associated with the app.
  - Scan Customer: Add a customer by scanning a barcode. For more information, see [Create Visits by Using Barcode Scan](#) on page 149.
  - Daily View: View visits that are scheduled for the day in a sequence based on optimized route and planned visit timing. Create visits and select a location for creating map-based visits. View the visit details, execute, complete, cancel, reschedule, or delete a visit, and navigate to the store related to the visit. To show traffic and route, and to cancel all visits, tap .

### EDITIONS

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

-  **Note:** You can delete visits, except completed visits, if **Delete Allowed** is selected in the visit template.

SEE ALSO:

[Automatic Visit Planning](#)

[Manually Plan Visits for Customers](#)

[Trip List-Based Visit Planning](#)

## Reports

Reports give detailed insights about your customers as tables and graphs. You can view information such as a customer's sales figures or promotions that are created for a customer by tapping the Reports tile on the main menu. The overview lists the relevant reports for the logged-in user.

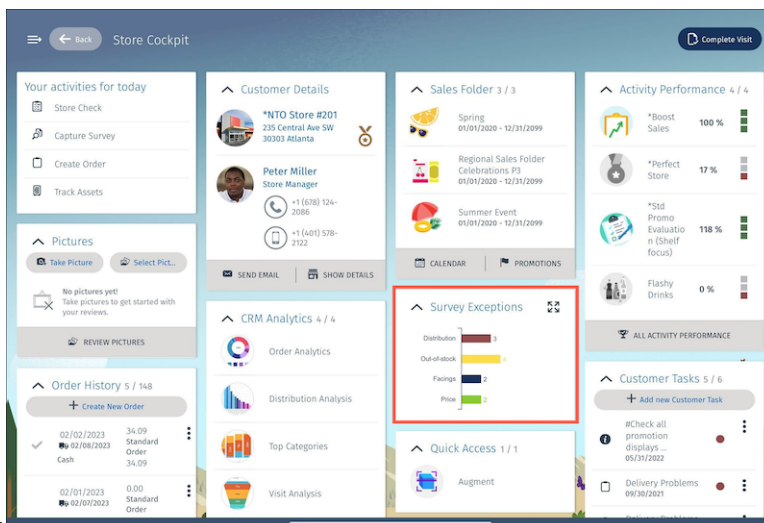
Reports can be a single page document or a single navigation step. You can also access reports from tabs in a module.

Here are the types of available reports:

- Customer Sales report: Monitor month-wise sales data for a customer. To access a customer sales report, from main menu, tap the Reports, Customer, or Visit Execution tile.
- Survey Exceptions report: Monitor the performance of products in a customer's store. To access the Survey Exceptions report for a customer, go to the Store Cockpit or Visit Summary

### EDITIONS

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

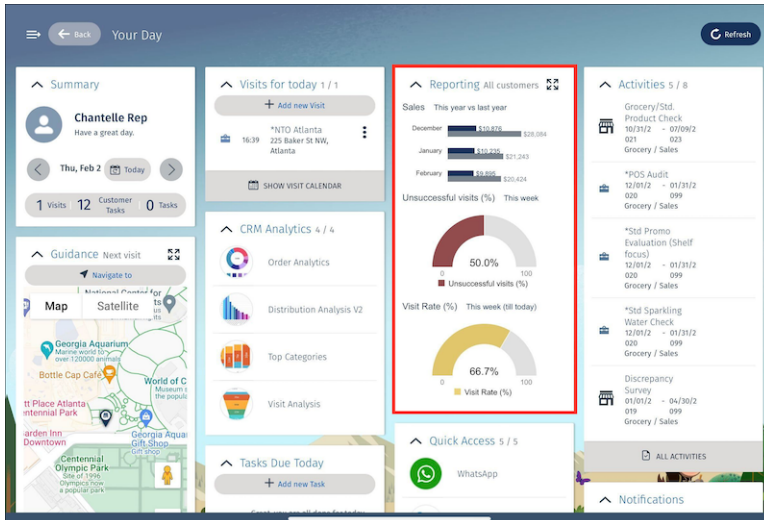


page.

- Reporting card: Get insights about your customer in a snapshot. View the customer sales and monitor three months' sales data by comparing the previous year's sales with the current year's sales, graphs illustrating unsuccessful visits, and visit rate. To access the Reporting card, go to the User Cockpit.

A visit that's not associated with a released order is considered unsuccessful. Unsuccessful visit rate is calculated as the number of unsuccessful visits  $\times 100 \div$  total number of completed visits.





- Promotion Calendar report: Get a visual overview of the current and planned promotions for a store in Promotion. To access the report go to the Sales Folder card in the store cockpit or to the Reports tile on the main menu.

### Generate a Customer Sales Report

A customer sales report shows the sales graph for a customer. Use this report to analyze month-wise sales data for a customer, and compare last year's sales with the current year's sales. You can view the data of the previous year, past months, and the current month.

### Generate a Promotion Calendar Report

A promotion calendar report is a graphical representation of the promotions that are valid for a period for a customer. The maximum number of days that are considered for a report is 180 days. The period is calculated as Visit Start Date + Promotion Finding Lead Time. You can view promotions report for either a customer or a customer set.

## Generate a Customer Sales Report

A customer sales report shows the sales graph for a customer. Use this report to analyze month-wise sales data for a customer, and compare last year's sales with the current year's sales. You can view the data of the previous year, past months, and the current month.

A customer sales report pulls data from the [Account\\_Sales\\_Data](#) object. This object contains information about the monthly sales volume of a customer. The information is captured in the object through custom project work.

1. From the main menu, tap **Reports**.
2. Tap **Customer Sales**.
3. To select a customer, tap **Customer**.  
By default, the currency is shown in USD.

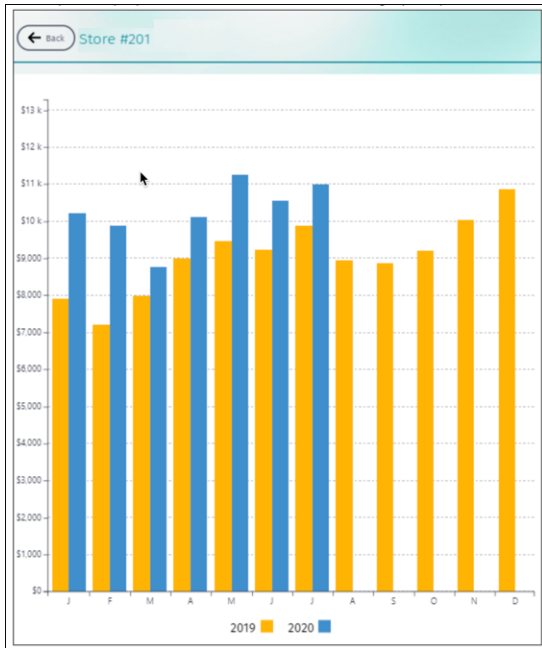
### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create a customer sales report:

- Consumer Goods Cloud Sales Rep



## Generate a Promotion Calendar Report

A promotion calendar report is a graphical representation of the promotions that are valid for a period for a customer. The maximum number of days that are considered for a report is 180 days. The period is calculated as Visit Start Date + Promotion Finding Lead Time. You can view promotions report for either a customer or a customer set.

1. From the main menu, tap **Reports**.
2. Tap **Promotion Calendar**.
3. To select a customer, tap **Customer**.

The promotion calendar report opens only if promotion information is available for the selected customer on the device. If the relevant promotion information isn't available on the device, you can request the data. If you request the data, the system downloads promotion information on the device for the selected customer. Only the promotions whose status is Committed are shown in a report.

In a report, 25 promotions are shown for tablets and 20 promotions for phones. If the number of promotions exceeds this limit, then a note is shown.

4. To view the promotion information, tap a promotion bar.  
The Type field shows the description of the promotion template that's used to create the promotion.

### EDITIONS

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

### USER PERMISSIONS

To create promotion calendar report:

- Consumer Goods Cloud Sales Rep



## Use the Consumer Goods Cloud Offline Mobile App

When you open the app, the data is available on the app as configured by your admin. To log in to the app, if you've set a security PIN, enter the PIN.

### Manage Visits

Create customer-related visits by using the Consumer Good Cloud Offline mobile app. You can also create visits that aren't customer-related. For example, you can create a private appointment or a vacation.

### Execute a Visit

The app lets you perform inventory checks and custom tasks.

### Complete a Visit

After you complete your store-related tasks, such as surveys, in-store checks, customer tasks, and overdue tasks that are assigned to your visit, you can mark the visit as complete.

### Sync Your Data Manually

Your device gets auto-synced with Salesforce either after you complete a visit or per a specified schedule. But if necessary, you can manually sync your device.

### Create a Daily Report by Using Time Cards

Use time cards in the Consumer Goods Cloud offline mobile app to capture the time that you take to perform your daily activities. Make better decisions, maximize your productivity, and plan your time better.

### Share Attachments

You can share PDF, XLS, and DOCX files from your Consumer Goods Offline mobile app using the Sharing button on the Attachment tab. This feature applies only to iOS users.

## Manage Visits

Create customer-related visits by using the Consumer Good Cloud Offline mobile app. You can also create visits that aren't customer-related. For example, you can create a private appointment or a vacation.

### Manually Plan Visits for Customers

Manually plan visits for customers that you currently manage.

### USER PERMISSIONS

To use the Consumer Good Cloud Offline Mobile app

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### [Create Visits from Job Lists](#)

Plan visits based on predefined job lists. You can create visits from job lists only in Weekly view.

### [Automatic Visit Planning](#)

Plan automatic visits based on visit frequency.

### [Trip List-Based Visit Planning](#)

Use trip lists to plan visits based on a predefined sequence of customers. You can also use trip lists to create visits for the same customers in the same sequence on a regular basis. You can plan trip list-based visits for a specific day or week.

### [Create Map-Based Visits](#)

Track and analyze your retail business stores by creating visits using pre-configured filters and Key Performance Indicators (KPIs). These indicators or metrics also measure the store performance. You can also use the map-based visits to view and create visits for stores within a certain distance of your location.

### [Select a Default Visit Type](#)

Select a default visit type to create visits so that each time a user plans a visit, the system creates a visit by using this template.

### [Create Visits by Using Barcode Scan](#)

Add a customer by scanning a barcode. You can then use this customer to create visits.

### [Create Visits](#)


To accommodate impromptu customer requests, create visits from both daily and weekly calendar views.

### [Edit a Visit](#)

You can edit the special instructions, the status remarks, and the priority of a visit.

## Manually Plan Visits for Customers

Manually plan visits for customers that you currently manage.

1. In the Weekly view, tap .
2. Select **Plan Customers**.  
You can search for a customer from the sidebar.
3. From the sidebar, long press a customer and then drop it to a day and time of the week. If a user is related to the selected customer, the system creates a visit and shows the visit on the user's agenda. The system automatically assigns a job list to the visit.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled


### USER PERMISSIONS

To create visits from the mobile app:

- Consumer Goods Cloud User

## Create Visits from Job Lists

Plan visits based on predefined job lists. You can create visits from job lists only in Weekly view.

1. In the Weekly view, tap .
2. Select **Plan Job Lists**.
3. Long press the job, and then drop it to a day and time of the week.

The visit type and customer of the new visits depends on the selected job list. After you create a visit, the job list disappears from the sidebar. You can view the Execute and Complete options for the visit only after you sync the data.

The system creates a new visit based on the selected job and magnetizes all other valid job lists for the customer. The system sets the visit type and customer based on the job list. The date and time are preset based on the visit on which you dropped the job. After the visit is created, the job list disappears from the sidebar.

## Automatic Visit Planning

Plan automatic visits based on visit frequency.

Frequency is the number of weeks between two automatically planned visits. For example, if you enter the frequency for a customer as 2, your sales reps visit the customer once every two weeks.

The automatic visit planning generates visits for a customer if:

- The sales rep is the manager of the account.
- The first day of the selected week is within the validity period of an active management relation.

Depending on the customer visit settings, if the planned visit date is different from the actual date, then the system creates multiple visits during the week.

Use customer visit settings for automatic visit planning. For each combination of management type and visit template, the system allows only one active customer visit setting for a period. While generating visits, the planning algorithm considers and maintains these settings for a customer:

- Planning mode
- Frequency of visits
- Start week and initial year
- Management type
- Time and day of the week
- Duration of visits
- Visit template
- Validity Period

Before creating a visit, to avoid duplicates, the automatic visit planning process verifies whether you created an automatic visit for the same day, user, visit template, and customer. If a manually-created visit exists for a user, the system creates an automatic visit that overrides the manually-created visit. Also, if you generate a visit on a non-working day of the user, the system selects the status of the visit as *Unscheduled*.

You can enable automatic visit planning if you fulfill these conditions:

- If the sales org of the visit and the automatic sales org wizard is the same
- If you added the user as a customer manager, and they have the requisite access permissions

### EDITIONS

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

### USER PERMISSIONS

To create visits from the mobile app:

- Consumer Goods Cloud User

### EDITIONS

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

- If the customer visit setting is valid for the visit creation date and has an active visit template

### Create Visits Automatically


You can plan automatic visits for the current week and the subsequent week.

### Create Visits Automatically

You can plan automatic visits for the current week and the subsequent week.

The planning modes that are available for automatic visit planning are:

- **Start Week:** Visits are planned for a specified frequency from a specified start week. After the end of the financial year, planning again begins with the start week.
- **Start Week Year:** Visits are planned for a specified frequency from a specified start week. The system considers the start week every time from the initial year of visit creation.
- **Last Visit & Frequency:** Visits are planned based on the last successfully completed visit and specified frequency. If there's no last planned visit, the system creates visits based on the Start Week algorithm.

1. From the calendar, tap , and then select **Automatic Planning**.
2. Tap **Plan Visits**.

### Trip List-Based Visit Planning

Use trip lists to plan visits based on a predefined sequence of customers. You can also use trip lists to create visits for the same customers in the same sequence on a regular basis. You can plan trip list-based visits for a specific day or week.

Sales Reps can have all trip lists over a period of 28 days available on their device. The system determines the validity period of trip lists as: (Trip\_List.Valid\_From <= current date - 14 days) and (Trip\_List.Valid\_Thru >= current date + 14 days). You can plan trip list-based visits from the weekly view.

1. In the weekly view, tap the menu, and then select **Create Visits Via TripList**.
2. Drop a trip list to a day of the week.
3. Enter a date.
4. To create a visit that takes a complete day, tap **All Day**.
5. To change the visit type, tap **Call Type**, and then select a different template.
6. Confirm your selection.

If the trip list is valid for the selected date, the system creates a visit for each day of the week as specified in the trip list. For each customer of the trip list, the system creates a visit based on the visit template and the customer sort order that you defined in the trip list. The system automatically assigns jobs to the visits.

### Create Trip Lists

Create a predefined sequence of customers from the weekly view of the calendar.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

#### USER PERMISSIONS

To create visits from the mobile app:

- Consumer Goods Cloud User

#### EDITIONS

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

#### USER PERMISSIONS

To create visits from the mobile app:


- Consumer Goods Cloud User

## Create Trip Lists

Create a predefined sequence of customers from the weekly view of the calendar.

1. In the weekly view, tap the menu, and then select **Create Trip List**.
2. Enter a description.
3. Select a trip list type.
4. Enter the validity period of the trip list.
5. If the trip list type is Daily Schedule, edit the Day field.
6. Save your settings.


The system creates the trip list record with these customer assignments:

-  **Note:** The system considers only the visits for planning whose status is either Planned or Completed. If you didn't create any visits for the selected week or day, then customer assignments aren't available for a trip list.
  - For Type Weekly: The system assigns all customers to the visit for the selected calendar week in the specified sequence and day.
  - For Type Daily: The system assigns all customers to the visit for the selected calendar day in the specified sequence.

## Create Map-Based Visits

Track and analyze your retail business stores by creating visits using pre-configured filters and Key Performance Indicators (KPIs). These indicators or metrics also measure the store performance. You can also use the map-based visits to view and create visits for stores within a certain distance of your location.

Distribution Rate and Out of Stock are the default performance indicators. After a visit is completed, the system flags the customers with distribution and out of stock issues in the Account Extension object. The system flags customers whose distribution rate is less than or equal to 92% or whose out of stock rate is greater than 12%. You can use the Modeler tool to add or remove filters and KPIs and adjust the default thresholds of the KPIs.

1. From the Advanced User Cockpit for Enhanced Data Model on the Guidance card, tap **Show Tour**.
2. Tap , and then tap **Daily View**.  
You can see the locations of all the scheduled visits in the map.
3. Tap **Find Customers**.

### EDITIONS

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

### USER PERMISSIONS

To create trip lists:

- Consumer Goods Cloud User

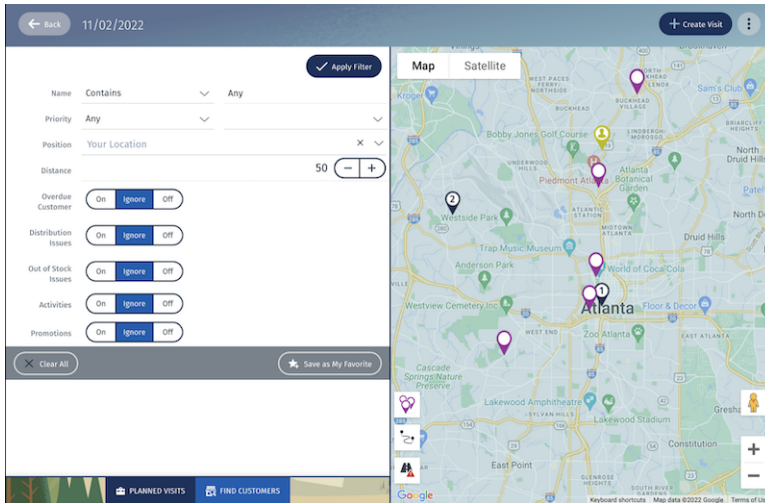
### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).

### USER PERMISSIONS

To create visits from the mobile app:

- Consumer Goods Cloud User






#### 4. Create visits from the filters or from the map.

##### a. To plan visits based on filters:

##### a. Use these pre-configured filters and KPIs:

- In the Name field, select a filter and enter a customer name.
- In the Priority field, select a filter and a visit priority.
- In the Position field, choose the starting point on the map, then enter the distance within which you want to view stores.
- To include customers that are overdue for a visit, turn on **Overdue Customer**.
- To include customers with distribution issues, turn on **Distribution Issues**.
- To include customers with out-of-stock issues during the previous visits, turn on **Out of Stock Issues**.
- To include customers with activities, turn on **Activities**.
- To include stores with promotions, turn on **Promotions**.

##### b. Tap **Apply Filter**. The map highlights locations based on the selected filters.

-  highlights the stores. To create a visit, tap any store and then tap **Create Visit**.
-  highlights the planned visits, numbered based on the sequence of visits.
-  highlights the user location.

##### c. To save these filters as favorites, tap **Save as My Favorite**. To remove the favorite filter, tap **Delete My Favorite**.

##### b. To plan visits from the map:

##### a. To create visits for existing stores, tap , tap any store, and then tap **Create Visit**.

##### b. To view the best route between the stores you plan to visit and the user, tap . This feature doesn't execute a route optimization or change the sequence of the planned visits.

##### c. To view the traffic in the area, tap .

 **Note:** If you're using a mobile phone to view the map for Consumer Goods Cloud offline mobile app, tap .



## Select a Default Visit Type

Select a default visit type to create visits so that each time a user plans a visit, the system creates a visit by using this template.

1. In the weekly view, tap the menu, and then select **Set default call type** for each user.
2. Select a call type, and then save your changes.  
The system selects the default template based on the default visit template that you specified in the user agenda. If you didn't specify a template in the agenda, then the system considers the template that you specified at the user level in the sales org.

## Create Visits by Using Barcode Scan

Add a customer by scanning a barcode. You can then use this customer to create visits.

You can create visits by using a barcode if:

- Customers have a valid barcode
  - The status of the tour is Running
1. In the weekly or daily view, tap the menu, and then select **Scan Customer**.
  2. Save your changes.

## Create Visits

To accommodate impromptu customer requests, create visits from both daily and weekly calendar views.

1. In the daily or weekly view, tap **Create Call**. Alternatively, you can long press any day on the visit calendar.
2. Enter the values, and then tap **Create**.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To select default visit type:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create customers:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To create visits:

- Consumer Goods Cloud User

## Edit a Visit

You can edit the special instructions, the status remarks, and the priority of a visit.

1. In the Retail Store cockpit, go to the Visit Details card.
2. To edit the details of a visit, tap **Edit**

### EDITIONS

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

## Execute a Visit

The app lets you perform inventory checks and custom tasks.

### [Process Navigation During Visits](#)

Process navigation contains all steps in the logical sequence to execute a visit. Click a visit from the store cockpit to open the navigation pane for the visit.

### [Execute an Inventory Check Task](#)

Inventory task lets you record the for KPI values of a product or a product category.

### [Execute a Custom Task](#)

You can enter KPI values for custom tasks. KPIs are listed in sections based on the product that the KPI is related to. KPIs that aren't related to a product are listed at the top.

### [Order Management](#)

Use the Orders module to place orders based on various order types during store visits. The inventory reflects as stock and is updated when a device is synced.

### [Tasks](#)

Tasks are activities that must be completed before a due date. Sales reps can create tasks by using templates. They can see all existing tasks on the Task Overview card of the main menu. Sales reps can specify a due date for the task and associate a user with the task. They can use multiple options to filter search results and copy a customer task.

### [Customer Tasks](#)

Sales reps can either review the customer tasks that their supervisor created or create customer tasks during visits. They can see all existing customer tasks in the Customer Task Overview module. For the customer tasks that they create, they can specify a due date for the task and associate a customer to the task. Sales reps can use multiple options to filter their customer task search results and copy customer tasks.

### [Answer Surveys While Executing Visits](#)

Answer the surveys shown in a visit while executing the visit. You can answer the survey only in the data type that's defined in the job definition template. You can add new products to the survey list. Additionally, you can use the filter option to quickly search a product for which you need to record a survey answer.

## Process Navigation During Visits

Process navigation contains all steps in the logical sequence to execute a visit. Click a visit from the store cockpit to open the navigation pane for the visit.



### EDITIONS

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

## Execute an Inventory Check Task

Inventory task lets you record the for KPI values of a product or a product category.

1. Tap a visit.  
Tasks for the visit show in the Tasks card.

2.  To start the visit, tap .



3. Tap a task.  
The in-store locations show as tabs at the bottom of the screen.

4. Tap an in-store location.

A list of products or product categories and the standard KPI to be recorded for the product or product category appear. If you're using a tablet, the page appears as a split screen. The left panel shows the list of products and product categories. The right panel shows the KPIs of the selected product or product category. If you're using a mobile device, to see the KPIs for a product or product category, tap a product or product category.

The highest-priority KPI is listed as Standard and the other KPIs are listed as Additional. If you've a long list of products or product categories, find a product or product category by using the search, scan, or filter option. To search for a product or a product category, use the name, product code, product ID, or GTIN. To scan the barcode of a product, use the device camera or an external laser barcode scanner. To see the list of product categories, use the filter option. When you select a product category, products associated with the category appear.

5. Enter KPI values for all in-store locations.
6. To return to the product screen, tap the back arrow.
7. To go to the Task card, tap the back arrow again.
8. To complete the other inventory check tasks in the list, repeat steps 3–7.
9. After you've completed the tasks for the visit, to go to the User cockpit, tap the back arrow.

10.  To complete the visit, tap , and then tap **Complete**.





If you haven't completed the mandatory tasks, you can't mark a visit as completed. If you can't complete the mandatory tasks, enter a reason, and then abandon the visit.

### EDITIONS

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

## Execute a Custom Task

You can enter KPI values for custom tasks. KPIs are listed in sections based on the product that the KPI is related to. KPIs that aren't related to a product are listed at the top.

1. Tap a visit.  
Tasks for the visit show in the Tasks card.
2.  To start the visit, tap .
3. Tap on a task that has the task type as Other.  
The in-store locations show as tabs.
4. Tap an in-store location.  
The list of KPIs to enter appears.
5. Enter KPI values for all in-store locations.
6. To go to the Task card, tap the back arrow.
7. To complete the other custom tasks in the list, repeat steps 3–5.
8. After you've completed the tasks for the visit, to go to the User cockpit, tap the back arrow.
9.  To complete the visit, tap , and then tap **Complete**.

If you haven't completed the mandatory tasks, you can't mark a visit as complete. If you can't complete the mandatory tasks, enter a reason, and then abandon the visit.

### EDITIONS

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

## Order Management

Use the Orders module to place orders based on various order types during store visits. The inventory reflects as stock and is updated when a device is synced.

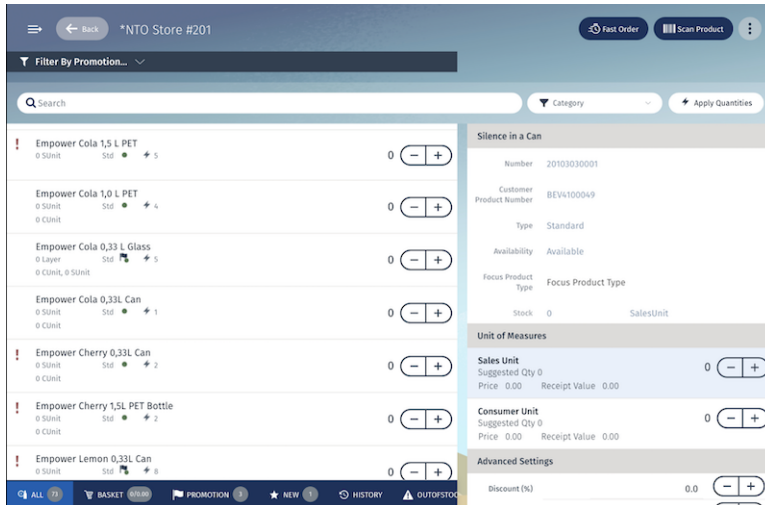
Order types can be configured and can be one or a combination of the listed types.

- Standard Order: Created for advance orders. The system automatically calculates the order values when the product quantity is entered.
- Indirect Order: For products that are delivered to the customer from your wholesalers.
- Direct Order: Created when sales reps visit a store. The order values are calculated depending on the order templates. Reps can view the value after they enter the product quantity and then tap Calculate.
- Returns: Created to handle product returns.
- Advertising Material: For advertising materials.
- Free Goods: For free items.
- Special Orders: For products used in promotions.

An Order can be based on the current requirement of a store or a forward order for a seasonal event such as Christmas. Sales reps can discuss an order with store managers, suggest order quantities, or hand over samples from the available stock in their vehicle. For large orders, reps can use the Fast Order page to place an order quickly. Reps can also get signatures from store managers as a confirmation of an order. An ERP system calculates the final and accurate price of an order.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled



The Order page shows the products in an order.

- shows products from the authorization list.
- shows focus products or the current priority products.
- shows products with promotions.
- shows order quantity suggestions based on historic orders.
- shows products from the authorization list that have promotions.

From the Orders module, a sales rep can perform these activities:

- View a product set based on authorization list, sales document assortments, and promotions.
- Add items outside of the assortment listing except for accounts with closed listing.
- Enter data efficiently by using the numeric keypad, in-place edit, and bar code scanning.
- Enter quantities in multiple units of measures with rounding.
- Get order quantity suggestions based on historic orders.
- Filter order items by promoted, new, historic, out-of-stock products, or category.
- View order notes, focus products, and customer product numbers.
- Calculate the order price.
- Capture signatures.
- Print order confirmations.
- View selectable promotions with optional pricing conditions.
- Place special orders.


Products can be prepopulated in the order item screen based on the authorization list—a specific type of product assortment—if these conditions are met:

- Product is active
- Consider Listing is Yes in Order templates
- Record Type is Assortment List in Product Assortment Templates
- Order date is between the valid from and valid to dates in Assortment Products
- Product Assortment Template is active
- Product has at least one default UoM—Is Order Unit and Order Ability are set to `True`

- The product has at least one UoM with Is Price Unit set to True.
- If Consider Field Availability is Yes in the order template, the order date is between the product's Field Valid From and Field Valid To dates
- If Consider Delivery State is Yes in the order template, the order date is between the product's Delivery Valid From and Delivery Valid To dates

Only products with the default UoM are shown. To add products that use a UoM that's not the default, select **Add Items**.

The products are further filtered from the Assortment List based on listing module and listing classification when Consider Modules is set to `True` in Customer Extension.

 **Note:** For the Consumer Goods Cloud offline mobile app, the prepopulated list can also be sourced from Sales Document Assortments, Promotions, or Out of Stock products from the survey and the order history.

### [Create an Order](#)

You can create an order from your mobile device.

### [Order Quantity Suggestion](#)

Sales reps can check suggestions for order quantities when they place an order. The quantity suggestion depends on the number of historical orders that's configured in the order template.

### [Modify Order Items](#)

To order a product, enter a quantity. You can capture items based on multiple units of measures. The system supports all logistical units that are related to a product, such as consumer units, sales units, layer, and pallets.

### [Add Additional Products](#)

You can add additional products to an order.

### [Create Fast Order](#)

For large orders, use the Fast Order option to quickly search and order products. The option is available for all product selector groups in an order disposal list.

### [Order Calculation](#)

Order calculation determines the pricing information of an order and calculates the order value.

### [Copy an Order](#)

To quickly create an order, use the Copy option in the context menu of an order and copy the contents of the order. You can copy all items along with item templates and quantities from the source order. This option isn't available for deliveries and truck load documents and is only available for pre-orders.

### [Release and Submit an Order](#)

To release an order, from the order header, tap Release.

### [Scan Products in an Order](#)

You can add new products in an order by scanning a product's barcode. When you scan a product, the system increases the order quantity of the product by the value defined in the Scanning Increment field of the order item template. You can individually select the item template that's used for a new order item for each order by using the Settings option.

### [Enter Order Notes](#)

To simplify an order entry for sales reps, define an invoice or delivery note for an order whose status is Initial. A predefined invoice or delivery note helps communicate special instructions to sales reps about order handling or any other order-related information. Sales reps can enter additional information such as notes specific to an order to track important details about the purchase.

### [Capture Signatures in an Order](#)

Signatures are used when a customer or store manager confirms and releases an order. If an order template has an assigned signature template, when you release an order, the system initiates the process to capture the store manager's signature.

[Preview Order Confirmations](#)

You can also view the store manager's signature confirming the order in the order confirmation PDF.

[About Order Payments](#)

Collecting payment for an order depends on the customer role and the document transaction type of the order.

## Create an Order

You can create an order from your mobile device.

1. On the Order overview screen, tap **Take New Order**.

2. Select a customer.

Only customers who have the Orderer role assigned are available for selection.

3. Select an order type.

The list shows order templates that are assigned to the user role with the document type as order entry. The system sorts the list based on the sort number that's specified for the order template. If the sort number isn't specified in the order template, then the system shows the record at the end of the list.

4. Tap **Create**.

If you create an order during a running tour for a tour customer or managed customer, then the system assigns the order to the tour.

Order items in an order are prepopulated based on the prefetching rules. For more information, see [Order Management](#).

## EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

## USER PERMISSIONS

To create orders:

- Consumer Goods Cloud User

## SEE ALSO:

[Order Management](#)

## Order Quantity Suggestion

Sales reps can check suggestions for order quantities when they place an order. The quantity suggestion depends on the number of historical orders that's configured in the order template.

When an order is either opened or created, the system shows the suggested product quantity. Quantity is suggested if the product has the Order Quantity option selected in the order template. Also, the product must have a parent product and isn't a part of any selectable promotions.

If the used order template has the quantity suggestion behavior as Last Quantities and a promotion is selected in the promotion filter, then the system shows the Apply Quantities field. When you tap this option, the suggested quantity is copied to the order.

For products that aren't part of any promotions, the number of orders to consider (n) for calculation is the value specified in the Number of Historic Quantities field of the order template. Also, the system considers the orders for the same customer, the same order template, and released orders. The system suggest the average of order line item quantities for items with the same item template. For example, if a product is ordered multiple times in the same order with the same item template, then all the line items are considered. The system shows the suggested quantity per line item per unit of measure.

Here's an example how suggested quantity is calculated for products:

- Number of historic quantities (n) = 5
- Number of orders determined on the device with the same order template and customer = 3
- Previous orders

## EDITIONS

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

Order Qty	Sales Unit	Consumer Unit	Layer
Order 1	<ul style="list-style-type: none"> <li>- Not related to any promotions: 3</li> <li>- Related to promotion 1: 3</li> <li>- Related to promotion 2: 3</li> </ul>	0	0
Order 2	0	3	0
Order 3	0	0	3

The system shows this suggested quantity in the Unit of Measures section of a mobile device.

UoM section	Suggested Qty (Average of last 3 orders)
Sales Unit	$((3 + 3 + 3) \text{ of Order 1} + 0 \text{ of Order 2} + 0 \text{ of Order 3}) / 3 = (9 + 0 + 0) / 3 = 9 / 3 = 3$
Consumer Unit	$(0 + 3 + 0) / 3 = 3 / 3 = 1$
Layer	$(0 + 0 + 3) / 3 = 3 / 3 = 1$

For special orders, there are restrictions to modify quantities. If the None or Only Decrease options are selected in the Modify Quantity field in the order item template and quantity suggestion aren't applied, then you can't edit the suggestion. To apply the quantity suggestion, tap Apply Quantities and then make edits. For a delivery document, the quantity modification settings are applicable only if the selected option in the Consider Quantity Suggestion field of the order template is Preordered Quantity.

### Modify Order Items

To order a product, enter a quantity. You can capture items based on multiple units of measures. The system supports all logistical units that are related to a product, such as consumer units, sales units, layer, and pallets.

1. On the Orders page, tap a product.
2. Make the required changes, such as change the item type, give a discount, or define a special price.

The line item modification behavior is controlled by the customer extension and order item templates settings. The order of preference is controlled by customer-level settings and then order item template-level settings.

#### EDITIONS

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

#### USER PERMISSIONS


To modify order items:

- Consumer Goods Cloud User



### Add Additional Products

You can add additional products to an order.

1. On the Order Overview screen, tap an order.
2. Tap , and then tap **Add Product**.

You can't add a product to an order via scanning that the system doesn't suggest in the Add Product list. To filter the product list by using various search parameters, use the advanced search option.

3. To add the product, select a product from the list and then tap **Back**.
4. Add the required quantities in the item list.  
The system shows the product under the respective product group.

### Create Fast Order

For large orders, use the Fast Order option to quickly search and order products. The option is available for all product selector groups in an order disposal list.

1. On the Order Item screen, for tablet devices, tap **Fast Order**. Or, for mobile devices, from the context menu, select **Fast Order**.

The system determines the list of products based on these conditions:

- If Fast Order is triggered from the Clear Filter view in a promotional order, then the products that fulfill all of these criteria are valid:
  - Shown in the All tab of the order disposal list
  - Belong to main item template
  - Don't have a selectable promotion reference
- If Fast Order is triggered for a selectable promotion, then the products that the system shows on the All tab of the order disposal list when promotion is in context are valid.
- If Fast Order is triggered for a non-promotional order, then the products that the system shows on the All tab of the order disposal list and belong to the main item template are valid.

2. Select a product, and then enter a quantity.

The considerations for an entered quantity are:

- Maximum four digits and no decimal
- Negative quantity is considered as zero
- Zero is allowed as a valid quantity

3. Add more products, if necessary.

If you add the same product with a different quantity, the system overrides the previously entered value.

4. Tap **Done**.

#### EDITIONS

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

#### USER PERMISSIONS

To add additional products:

- Consumer Goods Cloud User

#### EDITIONS

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

#### USER PERMISSIONS

To create fast orders:

- Consumer Goods Cloud User

## Order Calculation

Order calculation determines the pricing information of an order and calculates the order value.

Order calculation is based on:

- Simple: The system calculates the order based on a simple pricing mechanism by which values are calculated depending on the number of ordered products.
- Advanced Pricing: The system calculates the order based on the defined conditions.

### Penny Perfect Pricing

Penny perfect pricing calculates orders based on maintained conditions and provides accurately calculated documents, such as invoices or orders while on the field. Advanced pricing supports the various condition types and various search strategies or key types, making finding the relevant condition possible.

### Penny Perfect Pricing

Penny perfect pricing calculates orders based on maintained conditions and provides accurately calculated documents, such as invoices or orders while on the field. Advanced pricing supports the various condition types and various search strategies or key types, making finding the relevant condition possible.

To generate an accurate invoice, advanced pricing checks for relevant existing conditions for the combination of customer and product and then calculates the conditions in the correct sequence. Invoice is a legal document. So country-specific legal requirements are recorded.

You can initiate order calculation in these ways:

- Manually using the Calculate button: The button is visible only if the Compute Price field is set to Offline (Button) in the Price Control Settings section for the order template.
- Automatically by direct calculation: Calculation is initiated automatically when an order is edited. The order template determines the configuration settings for calculation.

The accurately calculated result is:

- Visible on mobile devices
- Available for printouts
- Stored in a JSON file, which is synced with the order based on predefined conditions

Order calculation is stopped if mandatory conditions aren't found. For example, if base price is mandatory for a calculation process, but isn't available for at least one ordered product, the order isn't calculated. If the Skip Selectable Promotion option is selected, then the order items that have a selectable promotion reference aren't calculated. But the order items that have auto-granted promotion reference aren't skipped.

If the Always Calculate option is selected in the order template, then the values are calculated during evaluation of rewards and hurdles every time an order is updated.

#### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

#### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

## Copy an Order

To quickly create an order, use the Copy option in the context menu of an order and copy the contents of the order. You can copy all items along with item templates and quantities from the source order. This option isn't available for deliveries and truck load documents and is only available for pre-orders.

When you copy an order:

- The default creation date is the current date.
- Delivery date is set as the current date based on the order template setting.
- The order isn't calculated.
- Manually updated values such as discounts are copied.
- Ordered items that belong to a valid selectable promotion are copied.
- Promotions that can be included in the promotion filter is determined based on the current date. So the promotion filter for the source order and copied order can have different promotion listings.
- The system shows the products from a refreshed or new promotion as presetting in the copied order when opened.

The system doesn't copy these items:

- Attachments such as signature records and pricing information.
- Attribute set records.
- Preset values such as delivery recipient, payer, and wholesaler.
- Items that belong to invalid order item templates.
- Additional items that were available in the source order generated via advanced pricing calculation; for example, free items.
- The Initiator, Responsible, and Owner users.
- Items that belong to a selectable promotion that's invalid.
- Items that are removed from a valid selectable promotion.

You can only copy orders based on the templates that:

- Have the creation platform as either Mobility or Both.
- Are valid.
- Have at least one user role assigned to the same user.

## Release and Submit an Order

To release an order, from the order header, tap Release.

If you selected Recalculation Required in an order template, you can choose to recalculate the order automatically before the system releases it. Ensure that you validate these conditions:

- Order is in Initial state.
- Order Calculation Time isn't empty or has the current date.
- Order Document Transaction Type isn't equal to Non-Valuated Delivery Note.

You can submit an order for approval only if you selected the value of Release Platform as All in the order template.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

## Scan Products in an Order

You can add new products in an order by scanning a product's barcode. When you scan a product, the system increases the order quantity of the product by the value defined in the Scanning Increment field of the order item template. You can individually select the item template that's used for a new order item for each order by using the Settings option.

To scan barcodes by using a device's camera on tablet devices, on the order details screen, tap Scan Product. Or, on phone devices, from the main menu, tap Scan. For orders or deliveries, you can define different scan behaviors per item type and add products via scanning based on this setting. The different scan behaviors are:

- **Standard UOM:** The system directly adds the product in the unit of measure (UoM) that's defined as the order unit of the product.
- **Current UOM:** Update the Scan UoM field in the device by using one of these values:
  - Consumer Unit
  - Sales Unit
  - Pallet
  - Layer

If the defined scan UoM is a valid UoM for a product, then the system directly adds the product to the order in the scan UoM.

- **Barcode UOM:** The system directly adds the product in the UoM that's defined in the scanned barcode.

Here are the considerations for barcode scanning:

- Only the UoMs that have the Order Ability option selected are considered.
- The European Article Numbering (EAN) code of a product's UoM, which is maintained in the GTIN field of the Unit of Measure related list of products, is used.

These scenarios can occur when you scan a product.

Scenario	Description
Barcode returns only one product record	The system directly adds the product to the item list.
Barcode returns multiple product records	The system shows the list of products, and you can select the required products from this list.
Barcode doesn't return any product record	The shows a warning message.

When you scan a product by using an external scanner or in-built mobile scanner, the system highlights it in the item list. Here's the summary of the scanning behavior.

Promotion is selected in the promotion filter	and	then
No	Product doesn't exist in the list	The system adds the product to the item list.
	Product exists in the list	The system highlights the existing product and increases the quantity based on the defined scan increment.

## EDITIONS

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

Promotion is selected in the promotion filter	and	then
Yes	Product exists in the list	The system highlights the existing product and increases the quantity based on the defined scan increment.
	Product doesn't exist in the list	The system shows a validation message.

You can scan products based on the configurations, such as sales document assortment, historical, listing, and promotion settings, that are defined for order templates. Each order template can have multiple order item templates. Here's the impact of different configurations on the list of products that's shown in the order item template.

Consider Listing	Closed Listing	Consider Listing Modules	Scanning of Products for Main Item Template	Scanning of Products for Other Item Templates
Yes	Yes	Yes	Only listing products that belong to specified assignment at customer classification are scanned and allowed for addition.	All master products are scanned and allowed for addition.
Yes	Yes	No	Only listing products are scanned and allowed for addition.	All master products are scanned and allowed for addition.
Yes	No	Yes	All master products are scanned and allowed for addition.	All master products are scanned and allowed for addition.
Yes	No	No	All master products are scanned and allowed for addition.	All master products are scanned and allowed for addition.

### Enter Order Notes

To simplify an order entry for sales reps, define an invoice or delivery note for an order whose status is Initial. A predefined invoice or delivery note helps communicate special instructions to sales reps about order handling or any other order-related information. Sales reps can enter additional information such as notes specific to an order to track important details about the purchase.

1. On the Order details page, from the Process Navigation pane, tap **Notes**.
2. Tap either **Invoice** or **Delivery**.
3. Enter your notes.

You can't edit invoice and delivery notes, even for canceled orders.

#### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

#### USER PERMISSIONS


To enter order notes:

- Consumer Goods Cloud User

## Capture Signatures in an Order

Signatures are used when a customer or store manager confirms and releases an order. If an order template has an assigned signature template, when you release an order, the system initiates the process to capture the store manager's signature.

Ensure that the order isn't in the Released status.

1. On the order header of an order, tap **Sign now**.
2.  **Note:** If signature steps aren't defined for signature templates, the system releases the order, without showing the signature page.

Get the store manager's signature, and tap **confirm**.

You can add a single store manager's signature to an order. You can multiple signature by configuring multiple signature steps, one for each signature to include other signatures

The system stores the captured signatures on a device, and syncs them with an order. You can also view the captured signatures on the mobile device from the Release Info tab of an order.

SEE ALSO:

[Signatures](#)

## Preview Order Confirmations

You can also view the store manager's signature confirming the order in the order confirmation PDF.

1. On the Order Overview page, tap an order.
2. In the Process Navigation pane, tap **Header**.
3. Tap **Preview**.

You can view a single signature in the order print layout. You can customize the print layout and include up to four signatures.

SEE ALSO:

[Signatures in Print Layout](#)

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To capture a signature in an order:

- Consumer Goods Cloud User

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To preview orders:

- Consumer Goods Cloud User

## About Order Payments

Collecting payment for an order depends on the customer role and the document transaction type of the order.

From the Order Header tab, collect payment for an order when you capture an order. You can collect payments only if these conditions are met:

- The customer placing the order has a valid payer role defined in customer extension.
- The document transaction type of the order is either of Cash Order, Credit Order, Cash Invoice, or Credit Invoice.

## Payment Method Considerations

If the preferred payment method specified in the customer extension and the payment method defined in the order payment templates assigned to the order template are the same, then payment can be collected using the preferred payment method. If the preferred payment method of the customer isn't specified in the customer extension, then the system checks the order payment templates assigned to the order template. The payment method is determined based on these conditions:

- If an order payment template is available that has cash as the payment method, then Cash is set as the default payment method for the order.
- If none of the order payment templates have cash as the payment method, then the payment method of the first order payment template is set as the default payment method for the order.

Considerations for collecting payments:

- For payment-relevant orders, paid amount must be greater than 0, and a value must be defined for payment method.
- When you copy an order, payment records aren't copied.
- You can collect payment only in one currency.

## Document Transaction Type

If the value of the document transaction type of the order is empty or incorrectly configured, then the order isn't payment-relevant, and you can't collect payment for the order. If the document transaction type of the order is configured, then the order is payment-relevant, and you can collect payment for the order.

If the document transaction type of the order is Cash Order or Cash Invoice, you can collect only full payment for the order, and you can't change the payment method. If the total value of the order changes after recalculation, then the paid amount is updated as the Gross Total Value of the order.

If the document transaction type of the order is Credit Order or Credit Invoice, you can collect partial payment for the order, and change payment method and paid amount. If payment method for the credit order is changed, then the related order payment record is also updated.

## Field to Review When Collecting Payments

When you collect payment for an order, review these fields to get details of the payment collected.

- **Payment Method:** Specifies the payment mode of an order. You can edit this field only if the document transaction type of the order is Credit Order or Credit Invoice. The list displays the values specified in the Payment Method field of the order payment template.
  - If the Payment Method is updated and the paid amount is greater than 0, the system deletes the existing order payment record, and creates an order payment record.

### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To collect payments for orders:

- Consumer Goods Cloud User, Consumer Goods Cloud Supervisor

- If the Payment Method is updated when saving the order, the system reevaluates the associated order payment templates and other attributes to ensure that the order has a consistent payment method.
- Paid Amount: Indicates the amount paid for an order. The paid amount is updated after calculating the total value of the order. You can edit this field only if the document transaction type of the order is Credit Order or Credit Invoice, and you can enter only positive value. The value of this field is set to 0, if the total order value is negative or the order isn't payment-relevant. When an order is recalculated, your changes are overwritten. You can review paid amounts of an order from the Order Header page.
- Currency: Indicates the currency in which payment is collected for an order. You can't edit this field.
- Payment Collected: Indicates whether payment is collected for an order. If paid amount is 0, then this option is disabled. If this option is selected and paid amount is greater than 0, then the Release option is enabled for the order. If a payment record isn't saved, the system resets this option after recalculating or reopening an order. If an order is payment-relevant, the system creates an order payment record when the order is saved, and this option is selected.

#### SEE ALSO:

[Add Customer Extensions](#)

## Tasks

Tasks are activities that must be completed before a due date. Sales reps can create tasks by using templates. They can see all existing tasks on the Task Overview card of the main menu. Sales reps can specify a due date for the task and associate a user with the task. They can use multiple options to filter search results and copy a customer task.

In the Consumer Goods Cloud offline mobile app, you can work with tasks as a sales rep or supervisor.

- As a sales rep, you can access, review, edit, release, complete, or cancel tasks that either you created or are assigned to you. You can't edit tasks whose status is either Completed or Canceled. The edited tasks are saved automatically.
- As a supervisor, you can access the reports of your team based on your org unit hierarchy. You can create tasks for your sales reps, and then release the tasks for assignment to the reps. The Responsible field on the Tasks screen shows your name at first. When you release a task, the field shows the name of the sales rep whom you assigned the task to. To release a task, tap **Release** on the Tasks screen and sync your mobile device. After the sales rep syncs their device and refreshes the cockpit, they can see the new task in the mobile app.

### [Create Tasks](#)

Use the Tasks card from the user cockpit to create tasks.

### [Complete Tasks](#)

As a sales rep, you can complete a task only if the workflow assigned to your task allows you to do so. Either you or your team members can complete the tasks.

#### EDITIONS

Available in: Lightning Experience in **Professional, Enterprise, and Unlimited** Editions that have Consumer Goods Cloud enabled



## Create Tasks

Use the Tasks card from the user cockpit to create tasks.

1. From the Tasks Overview, tap **Add Task**.
2. To select a user, tap **User**.
3. Enter a description.
4. Select a date.
5. Tap **Create**.

## Complete Tasks

As a sales rep, you can complete a task only if the workflow assigned to your task allows you to do so. Either you or your team members can complete the tasks.

Typically, these workflows are associated with tasks.


- If a rep created a task, they can complete the task.
  - If a supervisor created a task, reps can complete it after the supervisor releases the same. After releasing the task, the supervisor and the sales rep both sync their mobile devices. After the sales rep refreshes the cockpit, the task appears in the mobile app.
1. From the Tasks Overview, on the left pane, tap a task.
  2. Tap **Complete**.

## Customer Tasks

Sales reps can either review the customer tasks that their supervisor created or create customer tasks during visits. They can see all existing customer tasks in the Customer Task Overview module. For the customer tasks that they create, they can specify a due date for the task and associate a customer to the task. Sales reps can use multiple options to filter their customer task search results and copy customer tasks.

Here's a typical workflow for customer tasks.

- Sales reps either review customer tasks that their supervisor or head office creates or create customer tasks based on visits. When created, the status of a task is Initial.
- Next, sales reps assign priorities and due dates to customer tasks. Priority and due date ensure that important customer issues are solved quickly and improve customer satisfaction.
- Next, sales reps complete customer tasks as part of a visit, and release those tasks. The statuses of these tasks change from Initial to Released.
- Finally, supervisors can close these tasks. The status of the task changes from Released to Closed.

 **Note:** A sales rep can cancel a task if the status of the task is Initial. And a supervisor can cancel a task if its status is Released. In both cases, the status to the task changes to Canceled.

### EDITIONS

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

### USER PERMISSIONS

To create tasks:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### EDITIONS

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

You can edit only the customer tasks that you created. You can't edit customer tasks that are in either Complete or Canceled state. The edited data is saved automatically.

From the Main tab in the Customer Task module, view the details of a task. From the Attachments tab, you can view attachments including images and PDFs that give additional information about a customer task. You can capture an image by using your device, and add it as an attachment. The preview indicator shows the number of available attachments.

### Create Customer Tasks

Use the Consumer Good Cloud offline mobile app to create customer tasks during visits. Supervisors can also create tasks for their sales reps to be performed during visits.

### Release Customer Tasks

Release a customer task after the task is complete. A supervisor can close a task only if the task is released.

### Complete Customer Tasks

As a sales rep, you can complete a customer task only if the workflow that's assigned to your task allows you to do so.

## Create Customer Tasks

Use the Consumer Good Cloud offline mobile app to create customer tasks during visits. Supervisors can also create tasks for their sales reps to be performed during visits.

1. From Customer Tasks Overview, tap **Add Customer Task**.
2. To select a customer, tap **Customer**.
3. To select a customer task type, tap **Customer Task Type**.
4. Enter a description.
5. Change the due date, if necessary. By default, the due date is the current date.  
If you change the due date to a future date, the task won't appear on the Tasks card.
6. Tap **Create**.

## Release Customer Tasks

Release a customer task after the task is complete. A supervisor can close a task only if the task is released.

1. From Customer Tasks Overview, on the left pane, tap a customer task.
2. Update the details of the tasks. You can either enter notes or upload images.
3. Tap **Release**.

### EDITIONS

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

### USER PERMISSIONS

To create customer tasks:

- Consumer Goods Cloud Business Supervisor, Consumer Goods Cloud Business Sales Rep

### EDITIONS

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

### USER PERMISSIONS

To release customer tasks:

- Consumer Goods Cloud Business Sales Rep

## Complete Customer Tasks

As a sales rep, you can complete a customer task only if the workflow that's assigned to your task allows you to do so.

Depending on the workflow, either you can complete a task after you release it or you can request your supervisor's approval before you complete a task. It's also possible that a workflow requires you to only release a task, and your supervisor then closes the task.

1. From Customer Tasks Overview, on the left pane, tap a customer task.
2. Update the details of the tasks. You can either enter notes or upload images.
3. Tap **Complete**.

## Answer Surveys While Executing Visits

Answer the surveys shown in a visit while executing the visit. You can answer the survey only in the data type that's defined in the job definition template. You can add new products to the survey list. Additionally, you can use the filter option to quickly search a product for which you need to record a survey answer.

If you've access to visits, you can review answered surveys for a completed visit even if the surveys aren't valid on the current date. For example, if a survey isn't currently valid for a visit but was valid when the visit was completed, then the system shows the surveys for the completed answers. Similarly, if a product assortment isn't currently valid for a visit, but was valid when the visit was completed, then the system shows the surveyed products. But if a product is deleted from the database, the product isn't shown even if it's added to the visit survey.

1. In the Consumer Goods offline mobile app, from the store cockpit, tap **Capture Surveys**.
2. In the Products section, select a product record. You can scan a product's barcode to quickly get a product's detail. Use the Scan Product option to use an external scanner.  
The surveys for the product are shown in the Questions section.

3. Enter an answer.
4. To save the preset answer, tap **Done**.  
The preset answers are auto-populated.
5. Tap the back button to go to the store cockpit.

## Complete a Visit

After you complete your store-related tasks, such as surveys, in-store checks, customer tasks, and overdue tasks that are assigned to your visit, you can mark the visit as complete.

1. On the Store Cockpit screen of your Consumer Goods Cloud offline mobile app, tap **Complete Visit**, or from the left pane, tap **Visit Summary**, and then on the visit summary page of a store, tap **Complete**.

You can also go to the user cockpit or the context menu in Calendar, tap , and then tap **Complete**.

### EDITIONS

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

### USER PERMISSIONS

To complete customer tasks:

- Consumer Goods Cloud Business Sales Rep

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

### USER PERMISSIONS

To answer surveys:

- Consumer Goods Cloud Supervisor, Consumer Goods Cloud Sales Rep

### EDITIONS

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

The start and stop time captured for a visit depends on the screen that you completed a visit from. When a visit is completed from the context menu, the start and stop time values are set to the current time. When a visit is completed from the Store Cockpit screen, the app registers the time you opened the visit screen as the start time and the time that you completed the visit as the stop time.

If you open a visit that isn't canceled or completed, and Capture Proceeding Time is enabled in the visit template, then the time that you open the visit is captured as the visit start time. If you open the visit again, the previously captured start time is overridden and the time that you opened the visit again is set as the visit start time.



**Note:** Visit status isn't editable. The app determines the visit status value by the execute and complete actions of a visit.

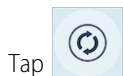
- If you try to complete a visit containing open orders, a warning appears. You may close the open orders first and then complete the visit.

You can start another scheduled visit without canceling or completing the previous visits.



## Sync Your Data Manually

Your device gets auto-synced with Salesforce either after you complete a visit or per a specified schedule. But if necessary, you can manually sync your device.

1.



2.

To initiate the sync, tap  or .

When the sync is completed, the date and time of the last sync gets updated.

To see user notifications, from the User Cockpit, click **Refresh**.

SEE ALSO:




[Salesforce Help: Sync Management](#)

## Create a Daily Report by Using Time Cards

Use time cards in the Consumer Goods Cloud offline mobile app to capture the time that you take to perform your daily activities. Make better decisions, maximize your productivity, and plan your time better.

### User Permissions Needed

To create daily reports:	Consumer Goods Cloud Sales User
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- From the Advanced User Cockpit, tap , and then tap **Time Card**.
- Tap .
- Select the date for which you want to create a time card entry.
- Select the type of daily report.
- Tap .
- Provide these details.

### EDITIONS

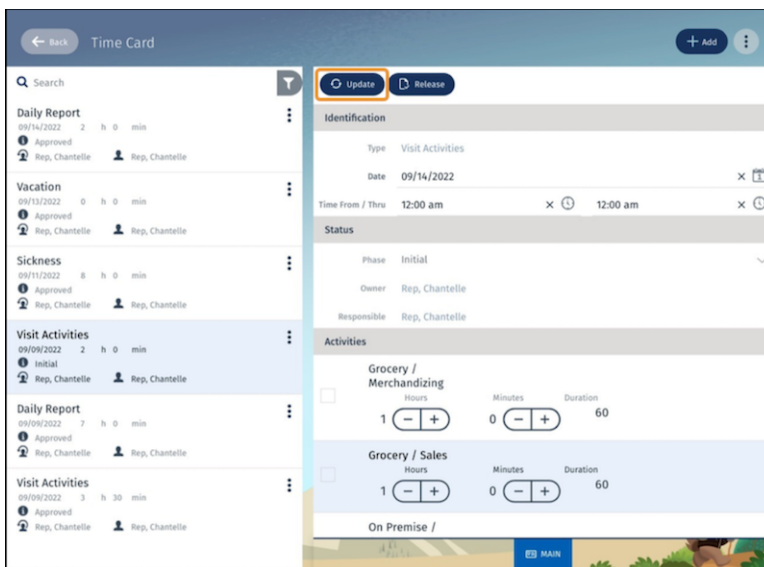
Available in: Lightning Experience in **Professional**, **Unlimited**, and **Enterprise** Editions that have Consumer Goods Cloud enabled

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled. This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards).

Field	Description
Identification	Shows the report type. You can select the date for which you want to create the time card entry, and the time at which you start and end work.   <b>Note:</b> Based on the time that's entered for the Time From/Thru field, the total working duration is calculated and shown in the Total Working Time field.
Status	Shows the status and the owner of the time card.
Activities	Time card activities against which you can log your work duration.
Total Activity Duration	Total working hours logged against the time card activities.
Total Working Time	Total working duration entered in the Time From/Thru field.
Comment	Comments for the time card.

7. If you want to see the duration logged against all your activities for the daily report and sync the daily report information with the calendar, tap **Update**. This image shows various time card entries and the option to update an entry before submitting for supervisor's review.



8. To save the time card, tap **Approve**.

You can edit or delete unapproved time cards that you created. But you can only edit the comments for an approved time card.

## Share Attachments

You can share PDF, XLS, and DOCX files from your Consumer Goods Offline mobile app using the Sharing button on the Attachment tab. This feature applies only to iOS users.

### User Permissions Needed

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To share attachments:	Consumer Goods Cloud Sales User
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1. From the Attachments tab, open and preview the relevant attachment.
2. Click **Sharing**.

### EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Consumer Goods Cloud enabled

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## Lopples Cookies Halloween Promotion

**The Situation**

- Halloween is the perfect intersection of Family fun and mischievous Play
- 41% of shoppers used "fun" to describe how they felt about Halloween

**My idea is:**

- Lopples Halloween Cookies are the perfect snack for family fun!
- Pumpkin shaped cookies with pumpkin flavor covered with dark chocolate will make this Halloween extra yummy!

**How it works:**

- Halloween Activation at \$3.49 SRP
- Feature on perimeter with core Lopples and Halloween Trick-or-Treat MP

**The benefits are:**

- +26% Margin at SRP
- Customer Excitement with NEW Innovation

**In Summary:**

- Timing:** Available September 15 - October 25 2015
- Merchandising:** On perimeter with core Lopples
- Location:** Lobby, Produce or Perimeter area
- Product Mix:** 10 cases of \$3.49 Lopples Halloween

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## Lopples Cookies Halloween Promotion

**Featured Brands**

**Perimeter Merchandising**

Item should be merchandized ideally in the following locations:

- Seasonal Aisle/Section
- Incremental Perimeter (adjacent to other seasonal products)
- Merchandising support will be field funded using assets available via PDD

Brand	Oz Weight	UPC	SRP	SDV	Case Pack	TM
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