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# Facilitate Curbside Pickup

Salesforce, Spring '24





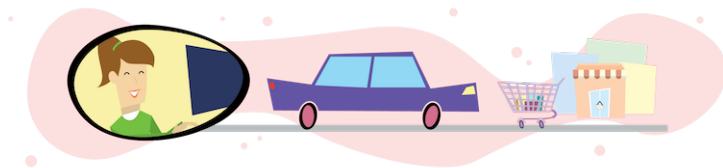
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# FACILITATE CURBSIDE PICKUP

Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.



## Get Started



Explore system architecture related to this solution.

- [B2C Industry Blueprint](#)
- [B2C Reference Architecture](#)
- [B2C Solution Architectures](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)
- [Customer 360 Guide for Retail: Quick Look](#)
- [Customer 360 Guides: Quick Look](#)

Every day, businesses see more buy online, pick up in store (BOPIS) orders and curbside pickups. Stores face new challenges as they learn to view new orders, pick products, and deliver them curbside. To meet customers needs, use digital engagement and B2C Commerce to orchestrate a smooth fulfillment and pickup process.

### **This solution kit helps you:**

- Let customers opt in to SMS messaging for curbside delivery.
- Notify store associates about new orders and how to fill them.
- Better communicate with customers when they arrive.

## Required Products

- Service Cloud Digital Engagement for SMS Channel
  - Service Cloud Chatbot (for inbound sessions)
  - Service Cloud Triggered Outbound Message (for automated outbound notification)
- Salesforce1 Mobile App
- Salesforce Chatter

- B2C Commerce (or other commerce platform)

## Recommended Roles and Skills

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- [Certified Admin and Developers for Service Cloud](#), preferably with chatbot experience
- B2C Commerce Developers with experience in APIs and ISML templates
- Architects to oversee the flow of data between Commerce, OMS, and Service
- Business owners from Commerce, Service, and Retail teams to define requirements

## Implement This Solution

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### [Facilitate Curbside Pickup Workflow](#)

Learn how data flows through the configurations to facilitate curbside pickup.

### [Design Considerations](#)

Keep these design considerations in mind when you facilitate curbside pickup.

### [Configurations](#)

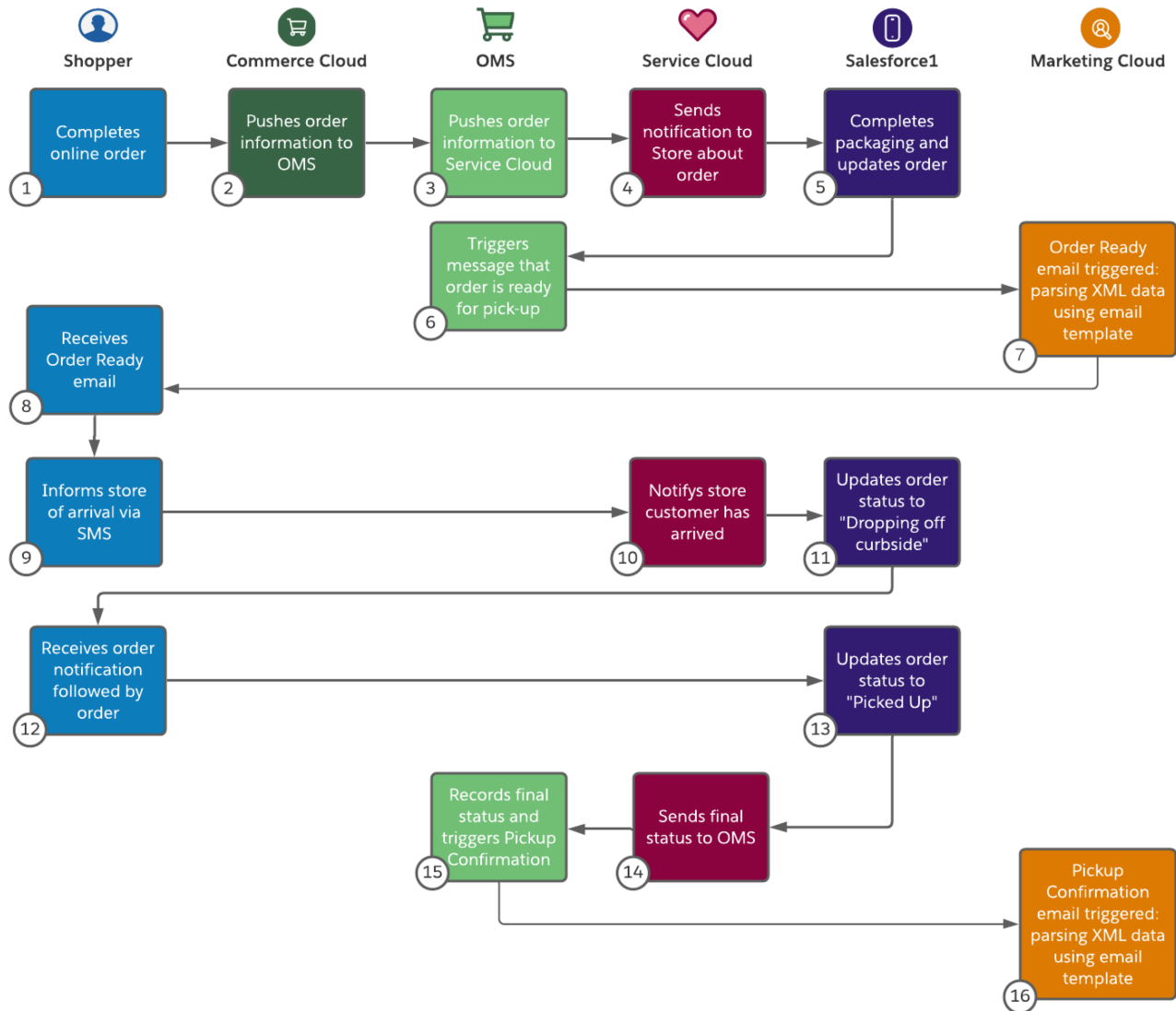
Use these configurations to facilitate curbside pickup.

## Facilitate Curbside Pickup Workflow

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Learn how data flows through the configurations to facilitate curbside pickup.



# Workflow



1. The customer completes an online order and gives consent to receive SMS for pickup info.
2. Commerce Cloud pushes the order and customer information to the Order Management System (OMS).
3. The Order Management System pushes the order and the customer's information to Service Cloud.
4. Service Cloud sends a notification to Salesforce1 Mobile App (the store associate) about the new order that's coming in.
5. The store associate completes the packaging and advances the order status in Service Cloud via Salesforce1 Mobile App.
6. The Order Management System triggers an API call to Marketing Cloud for the Order Ready message.
7. Marketing Cloud sends a triggered message to the customer notifying that the order is ready for pick-up.
8. The shopper receives the Order Ready email and heads to the store.
9. Shopper arrives at the store and sends a message to the SMS number with additional information such as car model and parking lot number.
10. Service Cloud sends a notification to the store associate via the Salesforce1 Mobile App notifying the customer has arrived.

11. A store associate updates the order status to “Dropping off to Curbside” via the Salesforce1 Mobile App.
12. The customer receives an order notification SMS with the estimated wait time, shortly followed by the curbside order delivery.
13. A store associate updates the order status to “Picked Up” via the Salesforce1 Mobile App after the order has been delivered curbside.
14. Service Cloud updates the Order Management System with the final Picked Up status.
15. The Order Management System sets the final Picked Up status, concludes the order, and triggers an API call to Marketing Cloud for the Pickup Confirmation message.
16. The Shopper receives their Pickup Confirmation email.

## Related Content

	<p>Review this solution’s use case and purpose.</p> <ul style="list-style-type: none"> <li>• <a href="#">Facilitate Curbside Pickup</a> on page 1</li> </ul>
	<p>Take the next steps in this implementation.</p> <ul style="list-style-type: none"> <li>• <a href="#">Design Considerations</a> on page 4</li> <li>• <a href="#">Configurations</a> on page 5</li> </ul>

## Design Considerations

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Keep these design considerations in mind when you facilitate curbside pickup.

## Key Considerations

### Licenses

The minimum license requirement for Service Cloud components includes:

- Platform licenses for store associates using the Salesforce1 mobile app
- One Service Cloud and one Digital Engagement license to set up text channels and chatbots
- A Volume license for another chatbot session, SMS session, and Outbound Messaging session consumption. Check with your account executive for potential RUL licenses.
- Purchase a separate SKU if a Short Code is required. It currently takes 10~14 weeks to provision a Short Code.

### Einstein Bot

Although Bot actions can support more complex use cases, focus on the MVP bot in the first launch.

- Use a menu and button-driven bot first then add optional Natural Language Understanding capability later.
- Focus on the key flow first, such as Order Pickup, in the first release. End expand it to other potential use cases such as Order Cancellation for exception handling.

### Exception Handling

The workflow in this solution kit explains a standard pickup process. But consider the following exceptions for production deployment.

- Customers can’t opt in for text communication on the pickup option. We suggest that you either remove the curbside pick-up option for these customers or use an alternate channel. These customers can call the store or pick up in store.





- Customers can send a different person for pickup. We suggest that you build a bot to handle other identity verification processes.
- Customers can text the chatbot to request other services, such as canceling the order. We suggest that you expand the bot actions to handle other inquiry types. An MVP bot can direct the customer to contact the call center for other inquiry types at the initial Bot launch.

## Performance and Scalability Considerations

- Note high volume customer requests upfront to best design technical architectures and platform events or API strategies. Refer to the [Salesforce Quick Reference Guide](#) for more on limit considerations.
- Salesforce applies a limit on the number of API calls per 24-hour period. The limit is based on the Salesforce edition type and number of licenses.
- Consider the effects of Carrier Filtering on your implementation. [Review a definition of Carrier Filtering and best practices](#). Also consider the [Messaging Regulations by Country](#).

## Related Content

	<p>Review earlier steps in this solution.</p> <ul style="list-style-type: none"> <li>• <a href="#">Facilitate Curbside Pickup Workflow</a> on page 2</li> </ul>
	<p>Take the next steps in this implementation.</p> <ul style="list-style-type: none"> <li>• <a href="#">Configurations</a> on page 5</li> </ul>

## Configurations

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Use these configurations to facilitate curbside pickup.

### Commerce Platform

This Solution Kit recommends a general approach to implement simplified communication for store associates. Use a cross-cloud solution between B2C Commerce, the Order Management System, and Service Cloud to manage inbound and outbound communication to customers. Use the Salesforce1 Mobile App for store associates.

Customers place an order online for pickup at a retail location. This kit assumes that Buy Online Pick Up in Store (Or Curbside Pick Up) is already in place for your commerce platform. See the [Buy Online Pick Up in Store \(BOPIS\) Solution Kit](#) for guidelines on implementing this functionality on B2C Commerce.

To enable BOPIS functionality, update the following key areas depending on your current template design:

- The product detail page
- A cart that clearly shows which items are being picked up at which store location
- A checkout in which Ship To information requires a mobile phone number and consent to receive SMS messaging for transactional purposes
- The order confirmation, history, and details

## Order Management System

Update integration to and from your existing Order Management System (OMS) to pass customer mobile phone and opt-in information. You aren't required to use Salesforce Order Management.

If you have B2C Commerce, see the following information on exporting orders and integrating with an OMS:

- [Basic Order Management Integration Framework](#)
- [Exporting Order Data from B2C Commerce](#)
- [Customizing your Order Management Integration](#)

## Service Cloud

Service Cloud manages inbound and outbound communication to customers through a text channel and notifications to store associates.

1. Model Data
  - Create a lightweight Order custom object as a placeholder for Order data received from OMS. This lightweight custom object isn't meant to serve as a Master data source for order data. Salesforce can query external systems for order data. An on-platform object enables a native object-based features and optimized performance.
  - Optionally, create a Store custom object for store-specific information, such as directions, store hours, parking information, or approximate pickup wait time.
2. Provision a [Text Channel](#) (Toll-free number or short code required for business usage).
3. Set up [Process Builder](#) and necessary flow actions to create a chatter notification to associates in the specific store upon pick-up order creation.
4. Set up Process Builder and necessary flow actions to notify customers that the order is ready for pickup. Include specific store instructions such as the designated parking area.
5. Set up a [chatbot](#) and deploy it to the text channel. The chatbot is designed to help customers at the time of arrival. Use it to:
  - Identify the customer based on the known mobile number.
  - Find the pickup order based on the located customer record.
  - Take the customer's pickup details such as car model and parking space number.
  - To notify associates about customer arrival and other details gathered from the previous step, create a chatter notification.
6. Set up Process Builder and necessary flow actions to notify customers that an order is on its way to curbside. Notify customers as store associates advance the order status.
7. Configure integration and data upload to include:
  - Bulk data upload and maintenance of Store data (or integration from system record on store data).
  - Add or update integration from existing OMS for order and customer data such as customer mobile phone and opt-in information.
  - Add or update integration to OMS for final order status update.

## Salesforce1 Mobile App

1. To advance order status, including status and optional custom messages to customers, create mobile [publisher actions](#).
2. Update the Order Page Layout.

3. Configure Order List view and Sharing settings. Although store associates see notifications when a new order comes in, configure a list view so that they can view all orders in progress. You can require other sharing rules on the Order object so that the list view only shows orders being picked up from this store.
4. Enable Chatter notifications for store associates.

## Related Content



Review earlier steps in this solution.

- [Facilitate Curbside Pickup Workflow](#) on page 2
- [Design Considerations](#) on page 4

## See Also

- [Stream Catalog Updates Through Collect Tracking Code](#)