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AP-204

Salesforce Accredited Agentforce Consumer Goods Professional

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Question: 1

A member of the Northern Trail Outfitters company has been tasked with setting up planograms for the field team. Which of the following steps is required to ensure an assessment task of planogram check is available to the field?

A. The team member must upload an image of the planogram to the assessment task's related documents.
B. The team member must associate the In-Store Location to the Planogram for the functionality to work.
C. The team member must populate the custom context field on the assessment task.
D. The team member must make sure Einstein Object Detection has been enabled.

Answer: B

Explanation:
Planogram execution in Consumer Goods Cloud depends on connecting the planogram to the physical location within the retail store where the shelf configuration must be evaluated. Salesforce uses an In-Store Location to represent areas such as shelves, aisles, displays, or endcaps. During planogram configuration, an Image record representing the planogram is associated with the appropriate In-Store Location. The Retail Store KPI then provides the assessment context by connecting the relevant Retail Store Group, In-Store Location Category, Assessment Indicator Definition, product or product category, and planogram.
This relationship ensures that when the field representative opens a Planogram Check during a visit, Salesforce can determine which reference planogram applies to the specific area being inspected. Simply attaching an image to an Assessment Task does not establish the required retail-location relationship. Custom Context is intended for custom assessment use cases rather than the standard Planogram Check configuration.
The critical design principle is therefore the association between the planogram and its In-Store Location, which provides the physical execution context required by Retail Execution.
Study Guide Topics:Data Setup -> Planograms -> In-Store Locations -> Retail Store KPIs -> Planogram Checks
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Question: 2

Where would a Consumer Goods Cloud Admin need to establish the expected value for the planogram metrics?

A. Retail Store KPI
B. Delivery Tasks
C. Assessment Task Definition
D. Assessment Indicator Definition

Answer: A

Explanation:
The expected value for a planogram metric is defined on the Retail Store KPI. In the Consumer Goods Retail Execution data model, an Assessment Indicator Definition specifies what is measured, while the Retail Store KPI establishes the target or expected value against which the field representative's actual observation is evaluated.
When an administrator creates a Retail Store KPI, Salesforce requires selection of the relevant Assessment Indicator Definition and provides configuration fields for the Retail Store Group, In-Store Location Category, product or product category, planogram, KPI type, effective dates, and target value. Supported KPI types include Facing, Share of Shelf, Out of Stock, Inventory, Price, and Revenue. The administrator then defines the target value appropriate to the selected assessment indicator.
During visit execution, the representative captures an actual value. Salesforce stores visit-level actual information separately in the Retail Visit KPI and compares that value with the target defined in the Retail Store KPI. This separation enables consistent compliance measurement across multiple stores and visits while maintaining centrally managed targets.
Therefore, the Retail Store KPI is the configuration record responsible for holding the expected value used in planogram compliance measurement.
Study Guide Topics:Data Setup -> Retail Store KPI -> Assessment Indicator Definition -> Target Values -> Planogram Metrics
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Question: 3

Which object is exclusively available to users in setup to perform direct store delivery?

A. Shipment
B. Delivery Task
C. Order
D. ProductTransfer

Answer: B

Explanation:
The Delivery Task is the Consumer Goods Retail Execution object specifically designed to support Direct Store Delivery activities during a visit. It represents the delivery activity assigned to the field or delivery representative and provides the execution context through which shipments and individual product transfers are processed.

Salesforce separates the delivery process into several related records. The Delivery Task defines the activity that must be performed as part of the Action Plan associated with the Visit. A Shipment is then associated with that Delivery Task to identify the inventory that must be delivered. Products and quantities within the Shipment are represented through Product Transfer records.
This architecture allows the same delivery task framework to control execution while shipment records manage the physical movement of inventory. Salesforce specifies the Lightning Direct Store Delivery permission for users who perform Delivery Task functionality. When an Action Plan Template containing a delivery task is assigned to a visit, Delivery Task records are created and can subsequently be associated with shipments.
Therefore, Delivery Task is the purpose-built Consumer Goods object for initiating and managing Direct Store Delivery execution.
Study Guide Topics:Visit Execution -> Direct Store Delivery -> Delivery Task -> Shipment -> Product Transfer
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Question: 4

Which object is connected to Action Plan?

A. Assessment Task
B. Visit
C. Action Plan Template
D. Retail Store

Answer: B

Explanation:
In Consumer Goods Retail Execution, an Action Plan is associated with a Visit so that the required activities can be presented to the field representative during store execution. The Visit represents the scheduled interaction with the retail location, while the Action Plan provides the operational work that must be completed during that interaction.
Salesforce uses Action Plan Templates as reusable frameworks. When creating an Action Plan Template for Retail Execution, the administrator selects Visit as the Target Object. Tasks and flows are then added to the template, and the template is published. The same template can subsequently be associated with multiple visits, allowing standardized activities to be consistently deployed across stores and representatives.
Assessment Tasks are individual execution activities contained within the Action Plan rather than the primary object to which the overall plan is connected. Retail Store provides the physical store context, but execution is organized around the Visit. Action Plan Template defines the reusable structure, whereas the instantiated Action Plan operates within the specific Visit.
This design gives Salesforce a consistent mechanism for translating reusable task configurations into executable activities for individual scheduled store visits.
Study Guide Topics:Visit Planning -> Visit -> Action Plans -> Action Plan Templates -> Assessment Tasks

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Question: 5

Items are not appearing in the delivery task. What object needs to be assigned to the user for the items to be listed?

A. Product
B. Retail Store KPI
C. Shipment
D. Product Transfer

Answer: C

Explanation:
A Shipment must be associated with the Delivery Task so that the products scheduled for delivery can be presented during execution. In Salesforce Direct Store Delivery, the Delivery Task provides the activity context, while the Shipment defines the inventory movement that the field representative is expected to complete.
Salesforce specifies that after a Delivery Task is generated from an Action Plan Template assigned to a visit, the task must be associated with a Shipment. Products are then added to that Shipment through related Product Transfer records. Each Product Transfer identifies the product and quantity involved in the shipment.
This hierarchy is important because the Delivery Task does not independently maintain its own product list. Instead, it obtains the delivery-item context from its related shipment. A standalone Product record does not establish that the product is scheduled for a particular delivery, and a Retail Store KPI belongs to the Retail Execution assessment framework rather than inventory delivery processing.
Accordingly, if delivery items do not appear within the Delivery Task, the administrator should verify that the appropriate Shipment has been associated with the task and that the shipment contains the necessary Product Transfer records.
Study Guide Topics:Visit Execution -> Direct Store Delivery -> Delivery Task -> Shipment -> Product Transfer
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