salesforce

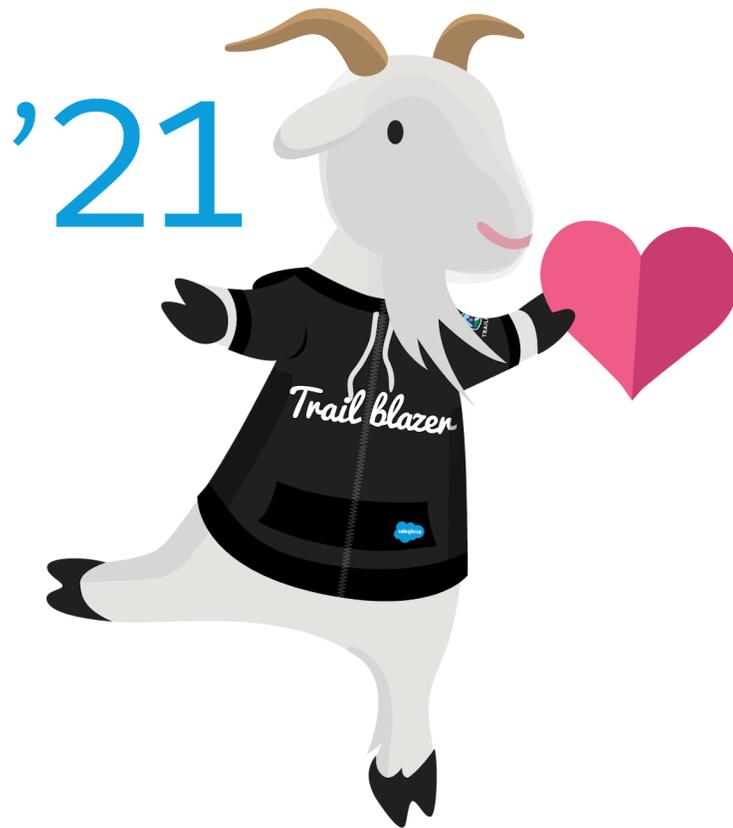# Salesforce Omnichannel Inventory Implementation Guide

Salesforce, Summer '21

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SALESFORCE OMNICHANNEL INVENTORY IMPLEMENTATION

This guide outlines the necessary steps for Salesforce Administrators to understand, set up, and use Salesforce Omnichannel Inventory. Follow the steps in the order they appear.

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Omnichannel Inventory runs in conjunction with a Salesforce org. The org is where you configure certain elements of Omnichannel Inventory and where you run the Omnichannel Inventory console app. After you enable the Omnichannel Inventory license in your org, follow these steps to configure the system.

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Omnichannel Inventory Concepts

Familiarize yourself with basic Omnichannel Inventory concepts to help you plan your implementation.

Omnichannel Inventory combines the power of headless APIs and the flexibility of the Salesforce Platform to deliver real-time inventory availability across your fulfillment channels. We designed it to integrate seamlessly with Salesforce B2C Commerce and Salesforce Order Management out of the box. It can also integrate with third-party storefront or order management systems.

> 📝 **Note:** We recommend using the headless Commerce API to load inventory data. This API requires Salesforce B2C Commerce.

Omnichannel Inventory provides you with tools to manage inventory availability data, including specialized objects, actions and APIs, platform events, and Lightning components. You can use them together with Salesforce Flow, a powerful automation system for implementing business processes on the Salesforce platform, to build customized inventory and fulfillment applications. In addition, the Omnichannel Inventory console app provides default functionality in the Salesforce UI.

For information on terminology, see the Omnichannel Inventory Glossary in *Salesforce Help*.

Inventory Fulfillment Locations

Omnichannel Inventory uses three objects to represent the facilities that fulfill orders:

Location

A specific location, such as a warehouse or retail store. Omnichannel Inventory tracks inventory availability for each location.

Location Group

A related set of locations, such as those covering a defined geographic area or locations that belong to a common brand or storefront. The location group aggregates and exposes the inventory at those locations. When a shopper orders through a sales channel associated with a location group, routing logic can fulfill the order from any location — or set of locations — in that group. In B2C Commerce, you can easily associate a location group with a site or store using the corresponding B2C Commerce inventory list.

Location Group Assignment

The relationship between a location and a location group. A location group has one assignment for each of its locations, and a location has one assignment for each location group it belongs to.

The complete set of locations, groups, and assignments is called the location graph.

📝 Note: When using B2B2C Commerce, your location graph is limited to one location and one location group.

Salesforce associates location and location group records with corresponding OCI records and B2C Commerce inventory lists using the External Reference field.

- External References must be unique. Attempting to save a duplicate External Reference causes an error.
- A location or location group's External Reference must exactly match the ID of the corresponding inventory list in B2C Commerce.
- In inventory API inputs and outputs, locations and location groups are identified by External Reference, not record ID.

Configuring Locations for Order Shipping and Pickup

You can configure a fulfillment location to ship order products or provide Buy Online, Pick Up In Store (BOPIS) service. Here are some examples:

Shipping Only

In your Salesforce org, assign the location to a location group associated with a storefront. When a shopper places an order on that storefront, create inventory reservations at the location group. Then route the reservations to individual locations for fulfillment according to business rules.

When using B2C Commerce, create a site inventory list that represents the storefront, and map it to the location group.

BOPIS Only

When a shopper places a BOPIS order, reserve inventory at the location.

When using B2C Commerce, create a site inventory list containing products available for BOPIS orders at that location, and map it to the location. When a shopper places a BOPIS order, use that inventory list instead of the inventory list associated with a location group for shipping fulfillment. To restrict a location to only BOPIS orders, don't add it to any location groups.

Shipping and BOPIS

In your Salesforce org, assign the location to a location group associated with a storefront. For order items to be shipped, reserve inventory at the location group, and for BOPIS items, reserve inventory at the location.

When using B2C Commerce, create a store inventory list containing BOPIS-eligible products for each location that can fulfill shipping and BOPIS orders. Map the location group to the inventory list that represents the storefront, and map each location to the corresponding inventory list containing products available for BOPIS.

Inventory Reservations

When an order is placed, the system reserves inventory to fulfill that order. A reserved quantity of a specific product at a location or location group is called a reservation. When a reservation is assigned to a location group, you can implement business rules to transfer it to a specific location for fulfillment. For example:

1. A shopper places an order for several products on an online storefront.

2. The system creates reservations for the ordered products at the location group containing that storefront's fulfillment locations.

3. Business rules calculate the most efficient set of locations in the group that can fulfill all the reservations from the order.

4. The system transfers the reservations to the individual locations determined by the calculation.

5. Each location that received one or more reservations fulfills the ordered products represented by its reservations.

The Inventory Lifecycle

This example illustrates the process of setting up and maintaining a system using Omnichannel Inventory with Salesforce Order Management and B2C Commerce.

1. Create the location graph in Omnichannel Inventory.

2. Seed Omnichannel Inventory with initial availability data from an external inventory management system, such as a WMS or ERP.

3. Create the products and locations in the B2C Commerce storefront.

4. Configure and enable the integration of Order Management with the storefront.

5. Configure and enable the integration of Omnichannel Inventory with the storefront, including inventory lists based on the location graph and the inventory availability data feed.

6. As shoppers place orders in the storefront, it sends order data to Order Management.

7. Order Management communicates with Omnichannel Inventory to identify product availability and route reservations to fulfillment locations.

8. As locations fulfill orders, Order Management communicates with Omnichannel Inventory to adjust the corresponding reservations and inventory levels in the Omnichannel Inventory service.

9. The external inventory management system sends regular physical stock level updates to Omnichannel Inventory, which then sends updated availability data to the storefront.

Prepare to Implement Omnichannel Inventory

Consider your inventory requirements and plan your implementation.

Plan Your Implementation

Before you begin, review the organization of your inventory and design a system to meet your specific business needs. Some of the decisions to consider include:

- How to handle data imports from an external system of record, such as a WMS.

- Which physical and virtual inventory locations to include in the Omnichannel Inventory location graph.

  📝 Note: The location graph is a complex topic, and changing it after uploading inventory data can cause performance issues. For more information, see Manage Locations and Location Groups in *Salesforce Help*.

> 📝 **Note:** When using B2B2C Commerce, your location graph is limited to one location and one location group.

- How to transfer any existing inventory data import processes from your current storefront to Omnichannel Inventory.

- How to manage the cutover from your existing implementation to the integrated system. For example, you can plan an order moratorium while switching to the new system for managing availability data.

- Whether any existing customizations or business processes can benefit from being reimplemented in Omnichannel Inventory.

If you use a Salesforce B2C Commerce storefront, considerations also include:

- Setting up one Salesforce org for each B2C Commerce instance that uses Omnichannel Inventory. Set up a production org for your production B2C instance, a sandbox org for each sandbox B2C instance, and so on.

  > 📝 **Note:** Before refreshing a Salesforce sandbox org that's integrated with a B2C Commerce instance, log a case with Salesforce Customer Support. Support reconnects the refreshed org to your B2C Commerce instance.

- Understanding that activating Omnichannel Inventory for a B2C Commerce instance activates it for all sites running on that instance. You use one Omnichannel Inventory instance for each B2C Commerce instance. Initial provisioning provides one Omnichannel Inventory instance. To provision another one, request an additional Order Management sandbox. Each Order Management sandbox allows one Omnichannel Inventory instance.

- Whether to use B2C Commerce stores to associate inventory lists with order product line items. If so, how to map stores to the location graph.

- How to map your sites, stores, and inventory locations to locations and location groups in Omnichannel Inventory.

- Which locations and location groups to associate with inventory lists in B2C Commerce.

- How to associate Omnichannel Inventory locations and location groups with B2C Commerce inventory lists that are used for orders but not assigned to a site. For example, lists assigned to a store.

- Whether any existing customizations are incompatible with Omnichannel Inventory, and whether to reimplement them in Omnichannel Inventory. This consideration includes any customization that creates or modifies individual product inventory records.

  > 📝 **Note:** OCAPI calls to the `inventory_lists/`*`{inventory_list_id}`*`/product_inventory_records` endpoint aren't compatible with Omnichannel Inventory.

Setup Step 1: Set Up Omnichannel Inventory in Your Salesforce Org

Omnichannel Inventory runs in conjunction with a Salesforce org. The org is where you configure certain elements of Omnichannel Inventory and where you run the Omnichannel Inventory console app. After you enable the Omnichannel Inventory license in your org, follow these steps to configure the system.

Initial Steps

If you're new to the Salesforce platform, start by setting up a Salesforce org. The person who signed your Omnichannel Inventory order form received a welcome email for the org. Their email address is the user ID of the org's initial Salesforce admin account. For information about setting up the org, see Set Up and Maintain Your Salesforce Organization in *Salesforce Help*.

> 🛑 **Important:** Instructions to log out, refresh a page, or wait for the cache to update are easy to miss. Skipping them can cause problems that are hard to troubleshoot, so follow every step carefully.

1. Enable Lightning Experience. Omnichannel Inventory isn't currently supported on Salesforce Classic or Mobile. On Mobile, you can view record pages but can't use other Omnichannel Inventory features.

2. If you plan to integrate with Salesforce Order Management, set it up by following the procedures in the Salesforce Order Management Implementation Guide.

3. If you aren't using Salesforce Order Management, define a set of fulfillment location types, such as Warehouse and Retail Store. Add them to the Location Type picklist on the Location object. For details about the location object, see Location in the *SOAP API Developer Guide*.

4. From Setup, in the Quick Find box, enter `Omnichannel Inventory`, and then select **Omnichannel Inventory**.

   📝 Note: **Omni-Channel** is a different product.

5. Turn on the **Omnichannel Inventory** setting.

Users and Permissions

To access Omnichannel Inventory features, users require either the System Administrator profile or the Omnichannel Inventory Manager permission set. You can assign the permission set to users with the Identity user license. To assign the permission set:

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. Select **Omnichannel Inventory Manager**.

3. Click **Manage Assignments**.

4. Click **Add Assignments**.

5. Select the checkbox next to each user that you want to have the permission set.

6. Click **Assign**.

7. Click **Done**.

   📝 Note: Assigning the Omnichannel Inventory Manager permission set to a user also assigns an Omnichannel Inventory license to that user.

Next, set the sharing settings for the Location and Location Group objects:

1. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

2. Click **Edit**.

3. For Location and Location Group, from the **Default Internal Access** dropdown, select **Public Read/Write**.

4. For Location and Location Group, from the **Default External Access** dropdown, select **Public Read/Write**.

5. Click **Save**.

Then, allow access to the ShouldSyncWithOCI field on the Location and Location Group objects:

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. In the list of profiles, select **System Administrator**.

3. Scroll to the Field-Level Security section. Perform these steps for the Location and Location Group objects:

   a. Click **View**.

   b. Click **Edit**.

   c. For the Sync with OCI field, select **Edit Access**.

   d. Click **Save**.

   e. Click **Back to Profile**.

If you use Salesforce Order Management and B2C Commerce, give the Order Management B2C Service permission set access to the inventory objects and fields:

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. Select **Order Management B2C Service**.

3. In the Apps section, click **Object Settings**.

4. Select **Order Product Summaries**.

5. Click **Edit**.

6. In the Field Permissions section, find Reserved at Location and select its **Edit Access** checkbox.

7. Click **Save**.

8. From the objects dropdown, select **Order Products**.

9. Click **Edit**.

10. In the Field Permissions section, find Reserved at Location and select its **Edit Access** checkbox.

11. Click **Save**.

12. From the objects dropdown, select **Location Group Assignments**.

13. Click **Edit**.

14. In the Object Permissions section, select all of the checkboxes.

15. Click **Save**.

16. From the objects dropdown, select **Location Groups**.

17. Click **Edit**.

18. In the Object Permissions section, select all of the checkboxes.

19. Click **Save**.

20. From the objects dropdown, select **Locations**.

21. Click **Edit**.

22. In the Object Permissions section, select all of the checkboxes.

23. Click **Save**.

Setup Step 2: Set Up the B2C Commerce Integration

If you're integrating Omnichannel Inventory with a Salesforce B2C Commerce storefront, follow these steps to configure the integration. Otherwise, skip to the next step.

1. Prepare B2C Commerce

First, get your B2C Commerce instance ready.

1. If you're setting up a new instance of B2C Commerce, install and configure it according to the documentation.

   📝 Note: You activate the Omnichannel Inventory integration per B2C Commerce instance. So if you have sandbox, stage, and production instances, you follow the process for each one separately.

2. Create or import your sites and stores in B2C Commerce.

3. Create or import the B2C Commerce inventory lists to be paired with locations and location groups. Make sure that each ID in B2C Commerce matches the External Reference of the corresponding location or location group in Salesforce.

4. Assign the inventory lists to sites and stores.

5. In Business Manager, navigate to **Administration** > **Global Preferences** > **Retention Settings**. Set the Inventory Record Retention to a value greater than 0. This setting ensures that after the integration is activated, B2C Commerce deletes any unused legacy product inventory records. When the integration is active, Omnichannel Inventory handles all individual product inventory records.

> 📝 Note: If this setting is 0, then B2C Commerce doesn't delete records that are no longer needed.

2. Set Up the Trust Relationship Between Omnichannel Inventory and B2C Commerce

This process includes steps in your Omnichannel Inventory Salesforce org and your B2C Commerce instance Business Manager. Perform these steps in order.

1. In your B2C Commerce instance, log into Business Manager. Keep this tab open.

2. In another browser tab, log into your Omnichannel Inventory Salesforce org, and go to Setup.

3. From Setup, in the Quick Find box, enter `Omnichannel Inventory`, and then select **Omnichannel Inventory**.

> 📝 Note: **Omni-Channel** is a different product.

4. Turn on **Omnichannel Inventory-B2C Commerce Integration**.

5. In the Quick Find box, enter `Manage Cloud-to-Cloud Connections`, and then select **Manage Cloud-to-Cloud Connections**.

> 📝 Note: If you don't see **Manage Cloud-to-Cloud Connections**, return to the Omnichannel Inventory settings page and verify that you turned on the **Omnichannel Inventory** setting.

6. Click **New Connection**.

7. From the **Cloud/Application** dropdown, select **Commerce Cloud**.

8. In the Remote Tenant URL field, enter the full URL for your B2C Commerce instance. For example:
   `https://`**`[HOSTNAME]`**`/on/demandware.store/Sites-Site`

9. Click **Request Connection**. The Allow Tenant Linkage? window appears.

10. In the window, click **Allow**.

11. Click **Establish Connection**.

> 📝 Note: If the **Establish Connection** button isn't available, refresh the page.

12. When the message "You've established a connection with this Cloud instance and application" appears, click **Done**.

Setup Step 3: Configure Omnichannel APIs

You can implement Omnichannel Inventory functionality via the headless Commerce API, the Connect API, and invocable actions.

API Access

The headless Commerce API is the main programmatic interface with Omnichannel Inventory. Before you can use it, you must configure it as described below.

If you can't use the Commerce API, you can access most of the same functionality via Connect in Apex or the Connect REST API.

You can also use Omnichannel Inventory invocable actions in Salesforce Flow.

Configure the Headless Commerce API

Before using the headless API resources, configure an API Client ID in Account Manager.

1. Log into Account Manager as an account administrator at https://account.demandware.com.

2. Select the API Client tab.

3. Select **Add an API Client ID**.

4. Enter a unique Display Name and a strong password.

5. Under Access Control, select **Enabled**.

6. In the Organizations section, click **Add**.

7. Select your org, and click **Add**.

8. In the Roles section, do the following:

    a. Click **Add**.

    b. Select **Salesforce Commerce API**, and click **Add**.

    c. Click the filter icon.

    d. In the Add Instance Filters tab, select your organization.

    e. Select your B2C Commerce instance, and click **Add**.

9. In the Default Scopes field, add the desired scopes. For information about available scopes, see the AUTHZ Scope Catalog in the *Commerce Cloud Developer Center*.

10. From the Token Endpoint Auth Method dropdown, select **client_secret_post**.

11. From the Access Token Format dropdown, select **JWT**.

Use your tenant ID, Client ID (not the display name), and Client ID password to obtain an Account Manager token for calling the Headless APIs. For example:

```
curl -k --data 'grant_type=client_credentials&scope=SALESFORCE_COMMERCE_API:tenant_ID'
--user 'client_ID:password' -X POST 'https://{AccountManagerURL}/dwsso/oauth2/access_token'
```

📝 Note: The tenant ID is part of your organization ID: `f_ecom_tenant_id`. For example, if your organization ID is `f_ecom_zzzz_001`, then the tenant ID is `zzzz_001`.

When building URIs for your API calls, you need the short code for your B2C Commerce realm and your Salesforce Org's tenant group ID. Use the short code in the hostname and the tenant group ID as the organization ID. For example:

```
https://{ShortCode}.api.commercecloud.salesforce.com/inventory/availability/v1/organizations/{TenantGroupId}/
availability-records/actions
```

To retrieve the short code and tenant group ID, follow these steps:

Short Code

In Business Manager, go to **Administration** > **Site Development** > **Salesforce Commerce API Settings**. If you haven't used the Commerce API in your realm, click **Request Short Code** to assign a short code for your realm.

Tenant Group ID

In your Salesforce org, from Setup, in the Quick Find box, enter `Omnichannel Inventory`, and then select **Omnichannel Inventory**.

🛑 Important: Use the tenant group ID as the Organization ID in resource URLs.

For more information on Commerce API authentication, see Commerce API Authentication in the *Commerce Cloud Developer Center*.

Setup Step 4: Initialize Omnichannel Inventory Data in Your Salesforce Org

After setting up the Omnichannel Inventory APIs, initialize the inventory data in your Salesforce org.

Location Graph

Set up your Location Graph by creating locations and location groups in your Salesforce org and committing them as described in Manage Locations and Location Groups in *Salesforce Help*. Use the Connect in Apex API, Connect REST API, or Omnichannel Inventory console app. You can't use the headless Commerce API to set up your location graph.

📝 Note: Configuring the location graph isn't a straightforward process. Before you begin, study the documentation.

Here's an overview of the steps to follow in your Salesforce org:

1. Create at least one location type.

2. For each location that fulfills orders, create a Location record.

   📝 Note: When using B2B2C Commerce, your location graph is limited to one location.

   - Set Should Sync With OCI to **True**.
   - Set Is Inventory Location to **True**.
   - Set the Location Type as appropriate.
   - Set the Visitor Address to the physical address of the location.
   - Set the External Reference to a unique value. If you use Salesforce B2C Commerce, use the External Reference to associate the location with a dedicated B2C Commerce inventory list.

3. For each storefront, sales channel, or desired logical group of locations, create a Location Group record.

   📝 Note: When using B2B2C Commerce, your location graph is limited to one location group.

   - Set Should Sync With OCI to **True**.
   - Set Is Enabled to **True**.
   - Set the External Reference to a unique value. If you use Salesforce B2C Commerce, use the External Reference to associate the location group with a dedicated B2C Commerce inventory list.

4. For each location, create a Location Group Assignment record for each location group that it belongs to.

   - A location doesn't have to belong to any location groups.

- A location can belong to multiple location groups. Create a location group assignment for each one.
- Assign at least one location to each location group.

5. Commit the changes to Omnichannel Inventory by following the instructions in the help topics.

Adding or removing locations or location groups after loading inventory availability data can trigger large availability data and cache updates. To mitigate the performance impact, we recommend these practices:

- If you use Salesforce B2C Commerce, follow the instructions in Omnichannel Inventory Location Graph Changes in the *B2C Commerce Infocenter*.
- Schedule location graph changes for times with low order traffic.
- Add or remove only one location or location group at a time.
- After making a change, wait for the update to finish before importing new inventory availability data.

Availability Data

Create or import initial product availability data for the locations and location groups. If possible, use the headless Commerce API as described in Inventory Impex in *Commerce Cloud Developer Center*.

📝 **Note:** Importing data with the Connect API can cause performance and API quota issues.

To create an inventory data file, format the data as a series of JSON entries representing locations and individual inventory records.

Considerations for inventory import data include:

- Separate the top-level entries with line feeds, not commas. Each entry must be on a single line.
- When the system reads a location entry, it assigns the subsequent inventory entries to that location until it reads another location entry.
- For each location entry, specify `"mode":"UPDATE"`.
- Each inventory record entry requires a unique recordId. Best practice is to use a UUID. The record Id protects against importing duplicate data.
- Each inventory record entry requires an effectiveDate.
- Each futures entry requires a nonzero quantity and a future expectedDate.
- The system only creates or updates entries that are included in the data. It doesn't delete entries that aren't included. However, if an included entry has an empty value, that value is deleted.
- To avoid overselling during the initial implementation period, we recommend defining safety stock levels.

📝 **Note:** The file size limit is 100 MB. For larger data sets, you can compress the file using GZIP or split the data into multiple files.

The following example illustrates the data format. For readability, the example shows the first few entries on multiple lines. In the import file, each location and inventory record entry must be on a single line.

```
{
  "location":"Warehouse-A",  // location identifier
  "mode":"UPDATE"  // must be UPDATE (other operations might be available in future releases)
}
{
  "recordId":"0a87539d-f3dd-47bc-91c7-9c752e39dbe0",  // unique identifier for the inventory
 record
  "onHand":10,
  "sku":"12389156",
  "effectiveDate":"2020-12-08T14:05:22.790896-07:00",
```

```
  "futures":[  // list of future restocks
    {
    "quantity":1,
    "expectedDate":"2021-04-18T14:05:22.781-07:00"
    },
    {
    "quantity":5,
    "expectedDate":"2021-05-18T14:05:22.781-07:00"
    }
  ],
  "safetyStockCount":0
}
{
  "recordId":"0a87539d-f3dd-47bc-91c7-9c752e312345",
  "onHand":10,
  "sku":"9485728",
  "effectiveDate":"2020-12-08T14:05:22.790896-07:00",
  "futures":[
    {
    "quantity":10,
    "expectedDate":"2021-04-18T14:05:22.781-07:00"
    }
  ],
  "safetyStockCount":0
}
{"location":"Warehouse-B","mode":"UPDATE"}
{"recordId":"0a87539d-f3dd-47bc-91c7-9c75abc123de","onHand":10,"sku":"12389156",...
{"recordId":"0a87539d-f3dd-47bc-91c7-9c75abc98765","onHand":10,"sku":"93867201",...
```

To upload the file to Omnichannel Inventory, first request an upload URI by making a POST call to this endpoint. Specify the data file in the payload:

```
/organizations/TenantGroupId/availability-records/imports/
```

The response includes these values:

- importId—A UUID representing the data import.
- importStatusLink—A unique endpoint you can use to retrieve the status of the data upload.
- uploadLink—The unique endpoint you use to upload the data file.
- uploadMethod—Always POST.
- uploadLinkExpirationUTC—The time when the upload link expires. If you don't upload the data by that time, you must request a new import.

To start the upload, make a POST call to the uploadLink URI with the import file as the payload.

To retrieve the status of the upload, make a GET call to the importStatusLink URI.

After creating or importing the initial inventory data, set up ongoing inventory data imports with your external inventory management system using the Omnichannel Inventory APIs.

📝 Note: For best performance, use delta data imports as much as possible. Try to limit full data imports.

Setup Step 5: Activate the B2C Commerce Integration

If you're integrating Omnichannel Inventory with a Salesforce B2C Commerce storefront, follow these steps to activate the integration.

B2C Commerce Inventory Modes

B2C Commerce can be in one of three inventory modes:

- **Commerce Platform Inventory**: B2C Commerce handles availability and reservations internally. The Omnichannel Inventory integration isn't active.
- **OCI Cache Enabled**: Omnichannel Inventory populates the availability data cache. However, B2C Commerce still handles availability and reservations internally.
- **Omnichannel Inventory**: The integration is active and B2C Commerce exclusively uses availability data in the cache and sends reservation requests to Omnichannel Inventory.

Initially, B2C Commerce is in Commerce Platform Inventory mode. When you first activate the integration with Omnichannel Inventory, B2C Commerce changes to OCI Cache Enabled mode. When the cache is ready, it can change to Omnichannel Inventory mode. The current mode is shown on the Omnichannel Inventory Integration page in Business Manager.

Activate the Integration

To activate the integration and start using Omnichannel Inventory with your B2C Commerce storefront, follow these steps:

🛇 Important: Don't begin this process until you verify that the initial import of inventory data into Omnichannel Inventory is complete. Use the importStatusLink API endpoint to check the import status.

1. In Business Manager, navigate to **Administration** > **Operations** > **OCI Integration**.

2. In the Omnichannel Inventory Integration Status section, click **OCI Cache Enabled**. B2C Commerce changes to OCI Cache Enabled inventory mode.

3. The Cache Status table begins populating with inventory data. Wait for data to appear for all inventory lists associated with locations and location groups.

   📝 Note: Normally, the cache requires at least one overnight data import to fully populate. For information on how the cache is populated, see Omnichannel Inventory Data Synchronization in the *B2C Commerce Infocenter*.

4. Verify that availability data in B2C Commerce matches the data in Omnichannel Inventory. To view B2C Commerce inventory data in Business Manager:

   a. Navigate to **Merchant Tools** > **Products and Catalogs** > **Inventory**.

   b. Select an inventory list.

   c. Select the **Records** tab for that list, and search for individual products. To review all the products in the list, leave the search field empty, and click **Find**.

   d. Select a product. The **General** tab shows the internal B2C Commerce availability data and the cached Omnichannel Inventory data for that product. Verify that the cached data matches the data in Omnichannel Inventory.

      📝 Note: Remember that in the OCI Future values, the Quantity is the sum of all future quantities for the product and the date is the date of the earliest future restock.

   e. Repeat the steps for each inventory list and product.

5. After you verify that all the Omnichannel Inventory data is in the cache, you can activate the integration. We recommend that you minimize the risk of overselling during the activation by taking one or more of these actions:

    • Activate the integration during a quiet business time when you expect few incoming orders.

    • Take your storefront offline temporarily while you activate the integration.

    • Before activating the integration, export all orders that already have reserved inventory.

6. Navigate to **Administration** > **Operations** > **OCI Integration**.

7. In the Omnichannel Inventory Integration Status section, click **Omnichannel Inventory**. B2C Commerce changes to Omnichannel Inventory mode. Now B2C Commerce uses the cache for all availability data and sends inventory reservations to Omnichannel Inventory. Individual inventory records in B2C Commerce are read-only.

8. Verify that everything works properly.

9. Start following regular processes to import inventory data into Omnichannel Inventory.

10. Stop the processes that import inventory data directly into B2C Commerce. But before doing so, we recommend waiting for a short time. By keeping them active, if you experience issues with the integration and turn it off, inventory data in B2C Commerce is still accurate.

Disconnect Omnichannel Inventory

If you experience serious issues with the integration, or want to disconnect your B2C Commerce instance from Omnichannel Inventory, log a case with Salesforce Customer Support. Before doing so, consider these recommendations:

• Plan to identify which inventory reservations are made in each system and handle them appropriately.

• If you plan to turn on the integration again, maintain the Omnichannel Inventory data import processes. By keeping them active, when you turn the integration back on, the data cache is up to date.

For information on troubleshooting the integration, see Troubleshooting the Omnichannel Inventory Integration in the *B2C Commerce Infocenter*.