SET UP SALESFORCE FOR B2B COMMERCE ON LIGHTNING EXPERIENCE

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SETTING UP SALESFORCE FOR B2B COMMERCE ON LIGHTNING EXPERIENCE


Enable Digital Experiences for Commerce
Enable Digital Experiences so that your stores can use Experience Cloud functionality.

Enable Commerce Features
Enable Commerce to provide important features for your stores, including objects and workspaces.

Enable Order Settings
To allow your store to process purchases, enable order settings.

Configure Sharing Settings
Configure default sharing settings for commerce objects.

Customize Commerce Object Page Layouts
To make commerce objects easier to use, customize the object page layouts.

Configure Internal Users
Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.

Permission Sets for Buyers, Buyer Managers, and Account Switchers
Salesforce provides preconfigured permission sets for buyers and buyer managers. The preconfigured buyer permission set allows access to the store. Buyer users can see products and categories and add products to wishlists. The preconfigured buyer manager permission set includes all buyer capabilities, and also allows access to manage carts and orders related to the buyer manager’s account. Buyer manager users can manage contacts and reports.

Customize the Commerce App
Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

Multifactor Authentication
Multifactor authentication (MFA) increases protection for user accounts against common threats like phishing attacks, credential stuffing, and account takeovers. As a Salesforce admin, amplify your security by requiring an extra level of authentication at login. You can also require MFA when a user performs certain actions, such as attempting to view reports or access a connected app.

Prevent Third-Party Attacks on Your Store
If you want to add third-party scripts and components to your store, make it impossible for these scripts and components to directly access the session ID (SID) cookie using JavaScript. To prevent attackers from hijacking your session or initiating cross-site scripting, enable the Require HttpOnly setting. This setting applies to your entire Salesforce org.

Configure a Custom Domain and CDN
For B2B2C Commerce, every B2C store must be associated with a custom domain. Each custom domain is configured to use a content delivery network (CDN). For B2B Commerce on Lightning Experience stores, a custom domain and corresponding CDN are optional, but we recommend them for B2B stores that require broad access and high security.
Install Commerce Reports
Install commerce reports to track Commerce orders.

Next Steps to Configure B2B Commerce on Lightning Experience
This set up guide describes how to get your org ready for B2B Commerce on Lightning Experience. When you’ve completed the setup, you can import data and create and configure stores.

Enable Digital Experiences for Commerce

Enable Digital Experiences so that your stores can use Experience Cloud functionality.

1. From Setup, in the Quick Find box, enter Digital Experiences. Select Digital Experiences, and then select Settings.

2. Select Enable Digital Experiences.

3. Enter a domain name, and click Check Availability.

   We recommend using something recognizable to your users, such as your company name. The domain name you choose is used for all your sites. You create a unique URL for each site by adding a unique name at the end of the URL. For example, if your domain name is store.example.com and you’re creating a customer site, you can add customers to create the unique URL store.example.com/customers.

   ! **Important:** You can’t change the domain name after you save it.

4. Click Save.

   **Warning:** Enabling Digital Experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates are available to Roles, Internal and Portal Subordinates. Opening up access to site and portal subordinates could expose your Salesforce data to external users.

   Use the Convert External User Access Wizard to help ensure that records or folders aren’t shared with external users. For more information, see Use the Convert External User Access Wizard
Enable Commerce Features

Enable Commerce to provide important features for your stores, including objects and workspaces.

1. From Setup, in the Quick Find box, enter Commerce. Select Commerce, and then select Settings.
2. Click the toggle so that it shows Enable Commerce.
3. Click Save.

Enable Order Settings

To allow your store to process purchases, enable order settings.

1. From Setup, in the Quick Find box, enter Order Settings, and then select Order Settings.
2. Select Enable Enhanced Commerce Orders.
   
   **Important:** After you enable this option, you can’t disable it.

4. Click Save.
Configure Sharing Settings

Configure default sharing settings for commerce objects.

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

2. Under Organization-Wide Defaults, click Edit.

3. Configure the default external access settings for objects.

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Buyer Group</td>
<td>External</td>
<td>Private</td>
<td>Private</td>
</tr>
<tr>
<td>Catalog</td>
<td>External</td>
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</tr>
<tr>
<td>Electronic Media Group</td>
<td>External</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Entitlement Policy</td>
<td>External</td>
<td>Private</td>
<td>Private</td>
</tr>
<tr>
<td>Order</td>
<td>External</td>
<td>Private</td>
<td>Private</td>
</tr>
<tr>
<td>Order Delivery Method</td>
<td>External</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Order Summary</td>
<td>External</td>
<td>Private or Controlled by Parent</td>
<td>Controlled by Parent</td>
</tr>
<tr>
<td>Product</td>
<td>External</td>
<td>Private</td>
<td>Private</td>
</tr>
</tbody>
</table>

Note: For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren’t authorized to access.

4. Click Save.
Customize Commerce Object Page Layouts

To make commerce objects easier to use, customize the object page layouts.

Customize the Product Page Layout
Customize the Product page layout to include the Product SKU and Product Class fields and the Categories and Commerce Entitlement Policies related lists.

Add Related Lists to the Account Page
Customize the Account page to add related lists that make it easier to manage accounts.

Add Buyer Information to the Account Details Page
Customize the Account Details page to add the buyer account component.

Customize the Product Page Layout

Customize the Product page layout to include the Product SKU and Product Class fields and the Categories and Commerce Entitlement Policies related lists.

1. From the Object Manager, enter **Product** in the Quick Find box.
2. Select **Product > Page Layouts > Product Layout**.
3. In the Product Layout section, select **Fields**, and drag **Product SKU** and **Product Class** to the Product Detail section.
4. In the Product Layout section, select **Related Lists**, and drag **Categories** and **Commerce Entitlement Policies** to the Related Lists section.
5. Click **Save**.

Add Related Lists to the Account Page

Customize the Account page to add related lists that make it easier to manage accounts.

1. From the Object Manager, enter **Account** in the Quick Find box.
2. Select Account > Page Layouts > Account Layout.


4. Drag the related lists you want to access from the account record to the bottom of the page.
   - To configure shipping and billing addresses, add the Contact Point Addresses related list.
   - To manage buyer users, add the Community Members related list.
   - To view active and closed accounts for the account, add the Cart related list.
   - To manage buyer groups, add the Buyer Groups related list.
   - To configure external accounts that buyers in the account can manage, add the External Managed Accounts related list.

5. Click Save.

Add Buyer Information to the Account Details Page

Customize the Account Details page to add the buyer account component.

1. In the App Launcher, enter Accounts in the Search apps and items box.

2. Select Accounts.

3. Click an account, and select the Details tab.

4. In the upper-right corner, click the Setup gear, and select Edit Page.

5. Drag the Buyer Account component to the bottom of the page.

6. Click Save, and then click Activate.

7. Select Assign as Org Default, click Next, and save your changes.

Configure Internal Users

Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.

1. Clone the Identity User profile.
   a. From Setup, in the Quick Find box, enter Profiles. Next to Identity User Profile, select Clone.
   b. For Profile Name, enter Commerce Business User Profile.
      
      You can choose another name, but keep in mind that this profile is used for your internal users.
   c. Click Save.

2. Configure the profile that you created.
   a. On the Profiles page, click Edit next to the profile you created.
   b. In the Custom App Settings section, for the Commerce app and the Salesforce CMS app, select Visible.
   c. In the Tab Settings section, change these items to Default On.
d. Click Save.

Use the Commerce Business User Profile when creating internal users. When creating a commerce admin user, assign the Commerce Admin permission set. When creating a merchandiser user, assign the Merchandiser permission set.

⚠️ **Important:** To allow self-registration on stores to work correctly, make sure all internal users who create stores are assigned to a role.

🔍 **Note:** To specify which internal users can access which stores, contact your account executive.

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### Permission Sets for Buyers, Buyer Managers, and Account Switchers

Salesforce provides preconfigured permission sets for buyers and buyer managers. The preconfigured buyer permission set allows access to the store. Buyer users can see products and categories and add products to wishlists. The preconfigured buyer manager permission set includes all buyer capabilities, and also allows access to manage carts and orders related to the buyer manager’s account. Buyer manager users can manage contacts and reports.

⚠️ **Important:** Salesforce recommends that you set the Default External Access sharing setting in Organization-Wide Defaults to Private on Product records for all commerce use cases. If the Default External Access sharing setting isn’t set to Private, and you have multiple stores or both stores and other Experience Cloud sites, it’s possible for authenticated users to use a SOQL query and discover all your products regardless of any entitlements you’ve set up. However, they can’t see prices nor purchase products. For
the most secure setup for external users, don’t grant access to products and other commerce objects at the profile level. Instead, grant access to objects through a permission set that is only assigned to buyers and buyer managers.

If you don’t want to use the preconfigured buyer and buyer manager permission sets, we recommend that you clone the preconfigured sets and customize as necessary. You can optionally create an account switcher permission set that allows buyers or buyer managers to switch between accounts. To create an account switcher permission set, clone the buyer or buyer manager permission set and add System Permissions.

## Customize the Commerce App

Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

1. Go to the app launcher, and select Commerce.

![Commerce App](image)

2. Add more objects to the Commerce App navigation menu.
   a. Click the dropdown arrow, and select Edit.
   b. Click Add More Items and add any objects that your merchandisers and commerce admins manage that aren’t already included on the list.
c. Save your changes.

3. Set additional tabs to be on by default.
   We recommend that you set the Commerce Setup and Price Book tabs to be on by default.
   a. Go to Setup > Home > Users > Profiles.
   b. Select the System Administrator profile, and click Edit.
   c. Set tabs, for example Commerce Setup and Price Book to default on.
   d. Save your changes.

**Multifactor Authentication**

Multifactor authentication (MFA) increases protection for user accounts against common threats like phishing attacks, credential stuffing, and account takeovers. As a Salesforce admin, amplify your security by requiring an extra level of authentication at login. You can also require MFA when a user performs certain actions, such as attempting to view reports or access a connected app.

For information about setting up MFA, see Multi-Factor Authentication.
Prevent Third-Party Attacks on Your Store

If you want to add third-party scripts and components to your store, make it impossible for these scripts and components to directly access the session ID (SID) cookie using JavaScript. To prevent attackers from hijacking your session or initiating cross-site scripting, enable the Require HttpOnly setting. This setting applies to your entire Salesforce org.

1. From Setup, in the Quick Find box, enter Sessions Settings, and then select Session Settings.
2. In the Session Settings section, enable Require HttpOnly attribute.
3. Click Save.

Configure a Custom Domain and CDN

For B2B2C Commerce, every B2C store must be associated with a custom domain. Each custom domain is configured to use a content delivery network (CDN). For B2B Commerce on Lightning Experience stores, a custom domain and corresponding CDN are optional, but we recommend them for B2B stores that require broad access and high security.

The custom domain is a subdomain of a top-level domain. For example, if your top-level domain is example.com, your subdomain is something like store.example.com. Your top-level domain is hosted externally from Salesforce. Your top-level domain and custom domains must be registered with a third party (for example, GoDaddy or Verisign). After you complete the necessary DNS entries, you can configure the custom domains and the CDN.

Before adding a custom domain for your store, create DNS entries with your third-party registrar. Create two CNAME entries—one for the custom domain, and one for a cert. Both entries specify a name and a target value.

For the first entry, the name is the first portion of your custom domain (without the top-level domain). For example, store instead of store.example.com. The target value has this form:

[custom_domain].[organization_id].live.siteforce.com

For the cert entry, you prepend _acme-challenge. to the name specified in your first entry (for example, _acme-challenge.store). The target value has this form:

_acme-challenge.[custom_domain].[organization_id].live.siteforce.com

For example, if your custom domain name is store.example.com and your 18-character org ID is 00dxx000001ggxeay, the name in the first entry is store. The target value is store.example.com.00dxx000001ggxeay.live.siteforce.com.

In the second entry for the cert, the name is _acme-challenge.store. The target value is

_acme-challenge.store.example.com.00dxx000001ggxeay.live.siteforce.com

1. From Setup, in the Quick Find box, enter Domains, and then select Domains.
2. Click Add a Domain.
3. For Domain Name, enter the name of your custom domain.
4. Select Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner and shared or single HTTPS certificate.
5. Select Single certificate for content delivery network (CDN).
6. Click Save.
For the changes to take effect, activate the domain after its provisioning status is Awaiting Activation. If you’re notified to enroll in CDN, activate your domain. When setting up HTTPS or renaming a domain, the domain’s live traffic continues to use its previously provisioned HTTPS option and domain name until it’s activated.

Tip: Your custom domain can remain in the provisioning phase for 6–24 hours. To shorten the provisioning phase, you can try creating a TXT record on the top-level domain and register it in advance. If you create the TXT record, you don’t have to wait as long for domain validation, and the provisioning phase typically goes faster.

Install Commerce Reports

Install commerce reports to track Commerce orders.

1. Set the field-level security for Orders, Sales Store.
   a. From the Object Manager, enter Order in the Quick Find box.
   b. Select Order > Fields & Relationships > Sales Store.
   c. Click Set Field-Level Security.
   d. Make sure that Visible is selected for Commerce Business User and System Administrator.

![Set Field-Level Security for Profile](image)
e. Click Save.

2. Ensure that the Sales Store field is visible to the System Administrator and Commerce Business User and is added to the Order Layout page layout.
   a. Click View Field Accessibility, and select Sales Store from the dropdown menu.
   b. Next to System Administrator, click Hidden and verify that Visible is selected next to the System Administrator profile.
   c. Select Add the Sales Store field to the Order Layout page layout.
   d. Click Save.
   e. Click View Field Accessibility, and select Sales Store from the dropdown menu.
   f. Next to Commerce Business User, click Hidden and verify that Visible is selected next to the Commerce Business User profiles.
   g. Click Save.

3. Ensure that the Activated picklist value is available for Order Status.
   a. Select Fields & Relationships > Status.
   b. Under Order Status Picklist Values, confirm that Activated is shown. If the Activated field doesn't exist, click New and follow the UI prompts to create it.

4. If you haven't done so already, set the Commerce Setup tab to be on by default.
a. Go to Setup > Home > Users > Profiles.

b. Select the System Administrator profile, and click Edit.

c. Change the Commerce Setup tab setting to Default On.

d. Click Save.

5. From the Commerce App navigation menu, select Commerce Setup from the dropdown.

6. On the Add Reporting quick link tile, click Install Reports.

7. Next to the reports listed on the page, click Install. The Commerce report folder is created when a Commerce report is installed.

8. Install all Commerce reports listed on the Commerce Reports page.

9. To view your installed reports, on the Commerce App navigation menu, select Reports.

   Tip: If you have multiple stores, you can make a report easier to read by adding a filter or column based on Sales Store: Name.

Next Steps to Configure B2B Commerce on Lightning Experience

This set up guide describes how to get your org ready for B2B Commerce on Lightning Experience. When you’ve completed the setup, you can import data and create and configure stores.

For detailed help, see Salesforce B2B Commerce on Lightning Experience

To start working with products and stores, see these topics.

- Import Products for All Stores Using a CSV File
- Create a B2B Store
- Create a B2B Store on an Existing Experience Cloud Site

To set up Salesforce Order Management for use with B2B Commerce on Lightning Experience, follow the instructions in the Salesforce Order Management Implementation Guide

   Note: Salesforce Order Management requires a separate license.

To set up Salesforce Omnichannel Inventory for use with B2B Commerce on Lightning Experience, follow the instructions in the Salesforce Omnichannel Inventory Implementation Guide

   Note: Salesforce Omnichannel Inventory requires a separate license.
For links to training and other resources, see B2B Commerce on Lightning Experience Resources.