B2B Commerce and D2C Commerce

Salesforce, Summer '25

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CONTENTS

SALESFORCE B2B COMMERCE AND D2C COMMERCE

Quickly create a customer-friendly B2B or D2C store. Take advantage of the store templates to create and customize your store with Experience Builder. Use standard Lightning functionality to set up checkout and payment and configure store settings. Define customer experiences, including search, carts, and checkouts. Import commerce data for accounts, products, price books, and entitlements using a CSV file.

Salesforce Mobile App

The Salesforce mobile app is designed for easy data access on the go. You can view Salesforce D2C Commerce record pages on the mobile app, but you can't access the Experience Builder tool.

Supported Editions

B2B and D2C Commerce is supported on Developer, Unlimited, and Enterprise editions.

Commerce Basics

Learn about D2C and B2B Commerce terms and concepts, personas, and licenses.

Get Started with Salesforce Commerce

Watch a video introduction to setting up a store. Prepare your org for Commerce and create a store. Get a draft of your store up and running. Discover resources that can help you learn more about commerce features and functionality.

Import and Export Commerce Data

Import data, including products, product variations, and images, by uploading a CSV file. Data import occurs asynchronously, so after you start an import, you can perform other tasks. We recommend using the CSV file import process, but for large imports, use Data Loader. You can also export data for up to 300,000 products to a CSV file.

Access to Commerce Stores

Specify which profiles and permission sets can access a B2B or D2C store. You can also set up self-registration so that shoppers can create an account and log in or allow guest browsing.

Products and Pricing

After you create your store, you can set up your products and pricing.

Configure Checkout for a Commerce Store

Add checkout functionality to your B2B or D2C store, including payment, shipping, and tax calculation services. If you have a D2C store, use the default managed checkout for a simple setup with automated store defaults for payment, tax, and shipping. If you have a D2C store and need options for third-party calculation services and want to design your own checkout page, switch to custom checkout. If you have a B2B store, you can only use custom checkout. Managed checkout doesn't support subscriptions.

Store Search

Get the most out of your store by helping shoppers find what they're looking for.

Search Engine Optimization (SEO) for Commerce

Search engine optimization (SEO) focuses on increasing non-paid search engine traffic for your site. Utilizing both creative and technical elements, you can improve search engine ranking and awareness, with the goal of driving more traffic to your B2B or D2C store.

Commerce Einstein

Commerce Einstein uses AI to automate tasks and personalize customer shopping experiences.

Agentforce for Commerce

Use the power of generative AI to drive more personalized communication with customers and help merchants drive greater shopper conversion. Agentforce Merchant Agent streamlines merchandising tasks and improves business outcomes through insights.

Data Cloud for Commerce

By combining the power of Data Cloud and Commerce Cloud, you can gain key business insights and unlock valuable analytics, personalization, and automation capabilities to provide connected, personalized experiences to your customers.

Store Management

Manage stores more efficiently using workspaces. Expand the reach of your store by enhancing language and currency support. Create and manage promotions to increase buyer incentive. Migrate store configurations, create custom reports, and manage existing integrations. Set up the emails that shoppers and buyers receive when they place an order, and what they see when your site isn't available. Review the steps required to use Omnichannel Inventory with commerce stores.

Commerce Promotions

Add promotions to your B2B or D2C store. Customize segments, discounts, qualifiers, and coupons to make sure that the right customers receive the right deals. Design your store pages and checkout flows to highlight promotions for eligible customers.

Sell Globally

Enable languages, translations, and currencies to expand the reach of your store to countries around the world.

Website Design for Commerce Stores

Use the Website Design workspace to add basic design elements to your store without leaving the Commerce app. For example, add your logo and set fonts, colors, and button styles. For more advanced design changes, such as configuring store components, pages, or navigation, you can move out of the Commerce app to Experience Builder.

Publication and Activation

When you've previewed your pages and are ready to start selling, it's time to make your store available to your customers. First, configure a custom domain and CDN. Assign the store a custom URL. Then publish the store and activate it.

Commerce Basics

Learn about D2C and B2B Commerce terms and concepts, personas, and licenses.

Commerce Resources

In addition to Salesforce Help, Commerce has documentation resources to help you successfully learn about, set up, administer, and extend the B2B and D2C Commerce apps.

Commerce Key Concepts

Get familiar with the main elements in B2B Commerce and D2C Commerce.

B2B and D2C Commerce Licenses

Purchase the right license for your commerce solution. You can use a license for B2B Commerce and Visualforce. You can also use a D2C Commerce license, or licenses for both B2B Commerce and D2C Commerce.

Commerce Personas and Permissions

A typical B2B or D2C Commerce implementation involves several task-based personas, such as commerce administrator, merchandiser, developer, and shopper.

B2B and D2C Commerce Permission Sets

Permissions determine the information users can access and the actions they can take when configuring or shopping at a store. Salesforce provides preconfigured permission sets, which define multiple permissions for internal and external users.

Order Management and Omnichannel Inventory

You can use Salesforce Order Management and Salesforce Omnichannel Inventory with B2B Commerce and D2C Commerce. Order Management helps you manage your orders throughout the order lifecycle, from creation to fulfillment to servicing. Omnichannel Inventory delivers real-time inventory availability data, helping you avoid costly undersells and oversells.

Pay-As-You-Go Usage Types for D2C Commerce and PayNow Stores

Pay-As-You-Go helps you track your usage for D2C Commerce and PayNow stores, and get billed monthly based on the usage.

Commerce Resources

In addition to Salesforce Help, Commerce has documentation resources to help you successfully learn about, set up, administer, and extend the B2B and D2C Commerce apps.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

What's New in Winter '25?

Learn about all the features delivered as part of this release.

B2B Commerce and D2C Commerce Winter '25 Release Notes

Help

B2B Commerce and D2C Commerce Help (PDF)

Developer Resources

B2B Commerce and D2C Commerce Developer Guide (HTML)

Salesforce Commerce Plug-In CLI Command Reference (HTML)

Connect REST API Developer Guide

Apex Reference Guide

B2B Commerce Aura to LWR Migration Guide

Trailhead

Get Started with Salesforce B2B

Get Started with D2C Commerce

Videos

Sell Direct to Consumers with Salesforce D2C Commerce

Get to Know B2B Commerce

Related Resources

Salesforce Order Management (Help)

Checkout for a B2B Store (Aura)

Salesforce Commerce Quick Start Guide

Commerce Key Concepts

Get familiar with the main elements in B2B Commerce and D2C Commerce.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Term	**Description**
D2C Store or B2B Store template	The template includes pages, theme layouts, and components to help you create a shopper experience. Showcase your products using the styles and layouts, and give shoppers an easy path to browse, add products to a cart, check out, arrange delivery, and track orders.
Buyer group	A buyer group is a collection of buyer accounts that have common access to specific entitlements. (D2C Commerce only) During your initial data import, a default buyer group is assigned to your D2C store.
Buyer Account	(B2B Commerce only) A buyer account gives a user purchasing access to a store. The account is associated with B2B entities, like price books and entitlements, that define the behavior of the account. A buyer account is a customer account that's enabled as a buyer and added to a buyer group.

Catalog	A catalog contains the hierarchical structure for the categories that classify your products in the store. To view products, you associate a catalog with the store. A store can have only one catalog. (D2C Commerce) During your initial data import, a default catalog is assigned to your D2C store.
Category	Use categories to organize products and make them easier to find. A category can contain up to five levels of subcategories and can belong to only one catalog.
Entitlement policy	An entitlement policy defines the products and product-related information that shoppers can see based on their buyer group membership. (D2C Commerce) During the initial import, a default entitlement policy is assigned to the D2C store.
Inventory	(D2C Commerce only) Physical products available for ordering. D2C Commerce can integrate with Salesforce Omnichannel Inventory to track available inventory at one fulfillment location.
Order	(D2C Commerce only) An order is a list of purchased products. You can manage and service orders using a subset of the features of Salesforce Order Management.
Price adjustment schedule	Use a price adjustment schedule to create a tiered pricing structure for your shoppers. Tiered pricing assigns discounts based on volume. The more a shopper buys of one product type, the lower the price.
Price book	A price book tracks the product prices that your store offers to shoppers. Create a custom collection of products with associated original prices, and assign it to specific stores or buyer groups. (D2C Commerce only) During your initial data import, default Standard Price, Original Price, and Sale Price books are assigned to your D2C store.
Price book entry	A price book entry is a product with a price that is listed in a price book. Each price book entry specifies a currency for the price.
Product	A product is an item or service that you sell. You can display a given product in more than one store catalog.
Product media	You can enrich your product offerings with images, URLs, and PDFs. A given product can include up to nine images.
Product variation	A simple product is a product with one version—no different sizes, colors, or materials. A product variation contains a parent product and child variations of that parent. For example, *tee shirt* is a parent product, and *tee shirt blue XL*, *tee shirt red S*, and *tee shirt Green XXL* are child variations of that parent. Each child variation product has its own SKU.
Search	From the moment that you create a record in Salesforce, the search engine works to make your information easy to find. In a B2B or D2C Commerce environment, you can search for products against a product's discoverable fields.
Search filter (facet)	A filter makes it easier for shoppers to discover the product that they're looking for. You add filters by selecting fields from a product record. For example, you can select the product field representing an item's color. Then shoppers can filter their search results by the color values that you provide. The only product field that you don't select as a filter is Product Category. The Product Category field is a filter by default and can't be removed.
Search indexing	Search indexing is a process that the store admin runs after updating the store so that the index reflects the changes. Some changes that you make to your store don't appear until they're indexed.

Shopper account	(D2C Commerce only) An account that gives a shopper purchasing access to the store. The account is associated with D2C Commerce entities, like price books and entitlements, that define the behavior of the account. A shopper account is typically created when the shopper self-registers in the storefront. All shoppers must be represented by person accounts.
Store	A store is a container for all your commerce data, including catalogs, categories, price books, and products. All D2C and B2B stores use an Experience Cloud site for the front-end shopping experience to showcase your products, arrange information for shoppers, and process orders. You can create multiple stores to serve different business areas or regions.

SEE ALSO:

Commerce Resources

Commerce Personas and Permissions

B2B and D2C Commerce Licenses

Purchase the right license for your commerce solution. You can use a license for B2B Commerce and Visualforce. You can also use a D2C Commerce license, or licenses for both B2B Commerce and D2C Commerce.

B2B Commerce Licenses and Allocations

A B2B Commerce license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

D2C Commerce Licenses and Allocations

A D2C license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

Connected Commerce Licenses and Allocations

A Connected Commerce license covers both B2B Commerce and D2C Commerce. It's based on your anticipated gross merchandise volume (GMV). You can also buy a license for one additional B2B store and one additional D2C store.

B2B Commerce Licenses and Allocations

A B2B Commerce license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience, and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Legacy Licenses

We updated the licenses for B2B Commerce in July 2022. If those updates don't apply to you, see Legacy Licenses for B2B Commerce for Visualforce (Classic) and B2B Commerce for information about your license. If you're unsure about which license information you need, contact your Account Executive.

Licenses and Related Limits

This table lists the licenses available for B2B Commerce. You can purchase as many licenses as you need, but you can't mix and match licenses, for example, a starter and a growth license or a PPO and GMV license.

Some limits shown in the table are per license. For example, one B2B Commerce Starter (PPO) license includes 1,000 store orders. If you buy six B2B Commerce Starter (PPO) licenses, you get 6,000 store orders. However, the number of stores and number of permission sets for internal users is per purchase. No matter how many B2B Commerce Starter (PPO) licenses you buy, you get 2 stores and 1,000 permission sets for internal users.

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

Table 1: What's Included in Each License

License	B2B Commerce Starter (PPO)	B2B Commerce Growth (PPO)	B2B Commerce Starter (GMV)	B2B Commerce Growth (GMV)	Additional Store
Number of Store Orders	1,000 per license	1,000 per license	NA	NA	NA
GMV Amount	NA	NA	1,000 per license	1,000 per license	NA
Number of Stores	2	10	2	10	1
Permission Sets for Internal Users	1,000	1,000	1,000	1,000	NA
Extra Platform Cache Space per Org	20 MB	80 MB	20 MB	80 MB	NA
Extra Data Storage per Org	NA	10 GB	NA	500 MB	NA
Extra File Storage per Org	NA	50 GB	NA	20 GB	NA
Extra API Calls per Day, per Org	NA	2,000	NA	20	NA
Number of Unmanaged Order Summaries	1,000 per license, store orders only	4,000 per license, can include store orders and multichannel orders	10 per license, store orders only	40 per license, can include store orders and multichannel orders	NA

Definitions That Affect Licenses

Order

A record of the activated Order Summary object that's created, modified, and processed in B2B Commerce before entering your order fulfillment system. Any order created from the store user interface, B2B Commerce APIs, or other related services must be created using this object.

Multichannel Order

An order record that originates from a system outside of B2B Commerce and is imported into an Order Summary object. For example, a multichannel order can originate from an electronic data interchange (EDI) system and can be uploaded to an Order Summary object using Data Loader. Multichannel orders count towards the number of Unmanaged Order Summaries.

Active Store

A store in a production org created with B2B Commerce.

Platform Cache

Memory layer in Salesforce that helps improve performance when querying certain org and session data. Your org provides a certain amount of space in the platform cache. A B2B Commerce license provides extra space. You can allocate the extra space for caching certain types of storefront data.

B2B Commerce External User

A buyer who logs in to an account on your storefront or store and browses and purchases products. An external user can't be personnel from your company.

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with either the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

Purchase enough licenses for external users to support the authentication and purchasing activity that you expect on your storefront.

B2B Commerce External User License (Member-Based)

- For buyer users—A Customer Community license gives users the minimum access to use B2B Commerce features.
- For buyer managers or buyers who need access to other buyers—A Customer Community Plus or higher license is required to access other buyers, role-based sharing, reports, and other objects beyond B2B Commerce objects.

B2B Commerce External Login License (Login-Based)

- For buyer users—A Customer Community Login license gives users the minimum access to use B2B Commerce features.
- For buyer managers or buyers who need access to other buyers—A Customer Community Plus Login or higher license is required to access other buyers, role-based sharing, reports, and other objects beyond B2B Commerce objects.

For information about B2B Commerce External Logins (Per Month) licenses for the Enterprise, Performance, and Unlimited Editions, refer to the information about the Customer Community Plus Login license at Experience Cloud User Licenses.

You can also apply any licenses that you've already purchased toward your B2B Commerce activity. For more information about which licenses to purchase to support your storefront activity, contact your account executive.

SEE ALSO:

D2C Commerce Licenses and Allocations

Commerce Personas and Permissions

D2C Commerce Licenses and Allocations

A D2C license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

Legacy Licenses

We updated the licenses for D2C Commerce in July 2022. If those updates don't apply to you, see Legacy Licenses. If you're unsure about which license information you need, contact your Account Executive.

Licenses and Related Limits

This table lists the licenses available for D2C Commerce. You can purchase as many licenses as you need, but you can't mix and match licenses, for example PPO and GMV licenses.

Some limits shown in the table are per license. For example, one D2C Commerce Starter (PPO) license includes 1,000 store orders. If you buy six D2C Commerce Starter (PPO) licenses, you get 6,000 store orders. However, the number of stores and number of permission sets for internal users is per purchase. No matter how many D2C Commerce Starter (PPO) licenses you buy, you get 2 stores and 1,000 permission sets for internal users.

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

Table 2: What's Included in Each License

License	D2C Commerce Starter (PPO)	D2C Commerce Starter (GMV)	Additional Store
Number of Store Orders	1,000 per license	NA	NA
GMV Amount	NA	1,000 per license	NA
Number of Stores	2	2	1
Permission Sets for Internal Users	1,000	1,000	NA
Number of Unmanaged Order Summaries	1,000 per license, store orders only	10 per license, can include store orders and multichannel orders	NA
Order Management Lite	5 per license	1 per license	NA
Omni Channel Inventory Location	1	1	NA

Definitions That Affect Licenses

Order

A record of the activated Order Summary object that's created, modified, and processed in D2C Commerce before entering your order fulfillment system. Any order created from the store user interface, D2C Commerce APIs, or other related services must be created using this object.

Multichannel Order

An order record that originates from a system outside of D2C Commerce and is imported into an Order Summary object. For example, a multichannel order can originate from an electronic data interchange (EDI) system and can be uploaded to an Order Summary object using Data Loader. Multichannel orders count towards the number of Unmanaged Order Summaries.

Active Store

A store in a production org created with D2C Commerce.

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

By default, 100,000 External Apps Login licenses are included for shoppers. If you need more than 100,000 External Apps Login licenses, work with your account representative to obtain the licenses you require. If your shoppers need licenses with a higher level of privilege, such as Customer Community Plus licenses, work with your account representative to upgrade your licenses.

SEE ALSO:

B2B Commerce Licenses and Allocations

Commerce Personas and Permissions

Connected Commerce Licenses and Allocations

A Connected Commerce license covers both B2B Commerce and D2C Commerce. It's based on your anticipated gross merchandise volume (GMV). You can also buy a license for one additional B2B store and one additional D2C store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Licenses and Related Limits

This table lists what's included in the Connected Commerce license.

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

Table 3: What's Included in Each License

License	Connected Commerce	Additional Store
GMV Amount	1,000 per license	NA
Number of Stores	2 B2B and 2 D2C stores	1 additional B2B store and 1 additional D2C store
Permission Sets for Internal Users	1,000	NA
Number of Unmanaged Order Summaries	1,000 per 1 quantity of GMV	NA

License	Connected Commerce	Additional Store
Salesforce Payments	Included	NA
Order on Behalf	Included	NA

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

By default, 100,000 External Apps Login licenses are included for shoppers. If you need more than 100,000 External Apps Login licenses, work with your account representative to obtain the licenses you require. If your shoppers need licenses with a higher level of privilege, such as Customer Community Plus licenses, work with your account representative to upgrade your licenses.

Commerce Personas and Permissions

A typical B2B or D2C Commerce implementation involves several task-based personas, such as commerce administrator, merchandiser, developer, and shopper.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Persona	Description	Permissions
System administrator	Performs Salesforce configuration tasks. For example, the system administrator creates and configures user accounts and enables digital experiences.	The system administrator is a high-level Salesforce admin with access to setup functionality, including tasks related to users, profiles, and object management.
Commerce administrator	Performs D2C Commerce administration tasks, including site configurations and permissions. For example, the commerce administrator creates stores and assigns members to stores.	We provide a Commerce Admin permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.
Merchandiser	Designs and manages the storefront. Executes and maintains the best way to display and sell products. For example, the merchandiser imports products and configures search.	We provide a Merchandiser permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.

Persona	Description	Permissions
Order Management administrator	Performs Order Management tasks. For example, servicing returns.	Use a permission set that has the Salesforce Order Management permission license and permission to the Order Management console app. Pair the permission set with the Identity user license.
Inventory manager	Configures and manages inventory functions using Omnichannel Inventory.	We provide an Omnichannel Inventory Manager permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.
Developer	Customizes the storefront and implements advanced features. Builds and develops the commerce experience and apps. For example, the developer uses APIs to integrate a third-party application or uses code to develop a custom component.	The permissions required depend on the tasks that the developer performs for your implementation.
Buyer manager	(B2B stores only) Manages multiple buyers within a buyer account and multiple buyer accounts.	We provide a buyer manager permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Buyer	(B2B stores only) Purchases products or services for organizations to use or resell. An external user who is registered on your storefront and can view and purchase products.	We provide a buyer permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Shopper	(D2C stores only) An external user who is registered on your storefront and can view and purchase products.	We provide a shopper permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Guest customer	An external user who can view and purchase products from your storefront but isn't registered.	As part of configuring your store, you can set up guest access to enable guests to shop on your storefront.

SEE ALSO:

B2B and D2C Commerce Licenses

B2B and D2C Commerce Permission Sets

B2B and D2C Commerce Permission Sets

Permissions determine the information users can access and the actions they can take when configuring or shopping at a store. Salesforce provides preconfigured permission sets, which define multiple permissions for internal and external users.

Guidelines for Assigning Permission Sets

We recommend that you assign permission sets to users that grant them only the required permissions to carry out their jobs.

View Permission Set Overviews

The permission set overview page gives detailed information about permission set functionality. From there, view settings such as Object Settings, Flow Access, and System Permissions.

Preconfigured Permission Sets for B2B and D2C Commerce

Users assigned to preconfigured permission sets receive permissions according to their persona's required functionality. You can customize these permission sets by cloning them and modifying individual permissions.

B2B and D2C Commerce Integrator Permissions

Salesforce provides several system permissions that enable users to integrate their B2B and D2C stores with third-party applications.

Default Object CRUD Permissions for B2B and D2C Commerce

You can perform Create, Read, Update, and Delete (CRUD) operations on objects in your org depending on your permissions. Users assigned to preconfigured permission sets receive CRUD permissions according to their persona's required functionality.

Guidelines for Assigning Permission Sets

We recommend that you assign permission sets to users that grant them only the required permissions to carry out their jobs.

Follow these guidelines when assigning permission sets to users.

- To limit access to top-level functionality, restrict the number of users assigned to Administrator and Commerce Administrator permission sets.
- Users assigned to Commerce Administrator and Administrator require no other permission sets.
- Buyer, Buyer Manager, and Shopper permission sets allow external users to view and purchase products on your storefront. You can set up guest browsing during store configuration so that external users can view and purchase products without registering.
- Follow task-based assignments for your internal users, including Merchandisers and Administrators. Use the permission set descriptions to match users with the personas that meet their required capabilities.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Permission Sets

View Permission Set Overviews

Preconfigured Permission Sets for B2B and D2C Commerce

Commerce Personas and Permissions

View Permission Set Overviews

The permission set overview page gives detailed information about permission set functionality. From there, view settings such as Object Settings, Flow Access, and System Permissions.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
3. Select the permission set that you want.

SEE ALSO:

Permission Sets

Preconfigured Permission Sets for B2B and D2C Commerce

Guidelines for Assigning Permission Sets

Commerce Personas and Permissions

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Preconfigured Permission Sets for B2B and D2C Commerce

Users assigned to preconfigured permission sets receive permissions according to their persona's required functionality. You can customize these permission sets by cloning them and modifying individual permissions.

Not all permissions in preconfigured permission sets are required to complete all tasks for the related persona. If you create custom permission sets, use the permission descriptions to match users with the permissions that meet their required capabilities.

This table shows the permissions defined by each preconfigured permission set for B2B and D2C Commerce.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Table 4: Key

✓	Enabled by the preconfigured permission set.
✗	Disabled by the preconfigured permission set.
N/A	Not included in the permission set, and can't be added to a cloned permission set.

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (D2C stores only)	Merchandiser	Commerce Admin
Access Drag-And-Drop Content Builder	Create and manage email templates and content in a drag-and-drop builder.	N/A	N/A	N/A	✓	✓
B2B Commerce Integrator	Process integrations and	N/A	N/A	N/A	N/A	✗

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (D2C stores only)	Merchandiser	Commerce Admin
	export and import orders from external order management systems.					
B2B Commerce Super User	Access all the carts and orders related to their account, regardless of who the carts and orders owners are.	N/A	✓	N/A	N/A	N/A
D2C Commerce User	Access the D2C checkout.	N/A	N/A	✓	N/A	N/A
Commerce Entitlements Integrator	Receive Modify All permissions for Buyer Group, Buyer Group Member, Entitlement Buyer Group, Entitlement Policy, and Entitlement Product objects to integrate entitlement data from a third-party system.	N/A	N/A	N/A	N/A	✗
Commerce Shipment Integrator	Access shipment information. A user's access to order summaries controls the user's access to shipments.	N/A	N/A	N/A	✓	✓
Commerce User	Access the store.	✓	✓	✓	N/A	N/A
Create and Customize Reports	Create, edit, and delete reports in personal folders.	N/A	✓	N/A	✗	✓

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (D2C stores only)	Merchandiser	Commerce Admin
Create and Set Up Experiences	Create Experience Cloud sites, manage settings, membership, login and registration, branding, and associated Site.com site.	N/A	N/A	N/A	✓	✓
Create CMS Workspaces and Channels	Create Workspaces and Channels in Salesforce CMS.	N/A	N/A	N/A	✓	✓
Create Report Folders	Create report folders and manage these folders if sharing rights allow.	N/A	✓	N/A	✗	✓
Customize Application	Customize the organization using App Setup menu options.	N/A	N/A	N/A	✗	✓
Lightning Console User	Access Lightning console apps.	N/A	N/A	N/A	✓	✓
Lightning Experience User	Access Lightning Experience and switch between Lightning Experience and Salesforce Classic.	N/A	N/A	N/A	✓	✓
Manage Account Addresses	Create, update, and delete contact point addresses on accounts.[1]	N/A	N/A	✓	N/A	N/A

---

[1] You can create up to 2,000 contact point address records. Additional records are dropped.

If buyers or buyer managers want to create, edit, and delete addresses, enable the Manage Account Addresses system permission within the permission set.

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (D2C stores only)	Merchandiser	Commerce Admin
Manage Custom Permissions	Create, edit, and delete custom permissions.	N/A	N/A	N/A	✗	✓
Manage Stores	Manage store settings.	N/A	N/A	N/A	✓	✓
Manage Translation	Manage translated labels in the Translation Workbench.	N/A	N/A	N/A	✗	✓
Payments API User	Access CCS Payment APIs.	✓	✓	✓	✓	✓
Run Flows	Run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.	N/A	N/A	✓	N/A	N/A
Run Reports	Run reports and dashboards.	N/A	N/A	N/A	✓	✓
View Roles and Role Hierarchy	View roles and role hierarchy.	N/A	N/A	N/A	✓	✓
View Setup and Configuration	View the App Setup and Administrative Settings pages.	N/A	N/A	N/A	✓	✓

SEE ALSO:

- Permission Sets
- View Permission Set Overviews
- Guidelines for Assigning Permission Sets
- Commerce Personas and Permissions

B2B and D2C Commerce Integrator Permissions

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Salesforce provides several system permissions that enable users to integrate their B2B and D2C stores with third-party applications.

The B2B Commerce Integrator and Commerce Entitlements Integrator permissions are disabled by default for all users. A Salesforce admin can enable these permissions for specific users by cloning the Commerce Admin permission set and then modifying it.

System Permission	Description	Included in These Permission Sets
B2B Commerce Integrator	Process integrations and export and import orders from external order management systems.	• Commerce Admin (disabled by default)
Commerce Entitlements Integrator	Receive “Modify All” permissions for Buyer Group, Buyer Group Member, Entitlement Buyer Group, Entitlement Policy, and Entitlement Product objects to integrate entitlement data from a third-party system.	• Commerce Admin (disabled by default)
Commerce Shipment Integrator	Access shipment information. A user’s access to order summaries controls the user’s access to shipments.	• Merchandiser (enabled by default) • Commerce Admin (enabled by default)

SEE ALSO:

B2B and D2C Commerce Permission Sets

Preconfigured Permission Sets for B2B and D2C Commerce

Default Object CRUD Permissions for B2B and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can perform Create, Read, Update, and Delete (CRUD) operations on objects in your org depending on your permissions. Users assigned to preconfigured permission sets receive CRUD permissions according to their persona’s required functionality.

You can customize permission sets by cloning them and modifying the object settings. However, the CRUD permissions that are editable in a cloned permission set can differ from the permissions granted in the preconfigured permission set. In such cases, this table lists both the default and editable CRUD permissions.

Entity	**Buyer (B2B stores only)**	**Buyer Manager (B2B stores only)**	**Shopper (D2C stores only)**	**Merchandiser**	**Commerce Admin**
Account	R	R	R	CRUD	CRUD
BackgroundOperation	—	R	R	- Default: — - Editable: R	- Default: — - Editable: R
BuyerAccount	R	R	—	CRUD	CRUD
BuyerGroup	—	—	—	CRUD	CRUD
BuyerGroupPricebook	—	—	—	CRUD	CRUD
CardPaymentMethod	—	R	—	R	R
CommerceEntitlementPolicy	—	—	—	CRUD	CRUD
ConsumptionSchedule	R	R	—	—	—
Contact	RU	CRUD	RU	CRUD	CRUD
ContactPointAddress	CRUD	CRUD	CRUD	CRUD	CRUD
Coupon	—	—	—	CRUD	CRUD
ElectronicMediaGroup	R	R	R	CRUD	CRUD
Image	R	R	R	—	—
Individual	R	R	R	R	R
Location	R	R	R	CRUD	CRUD
Order	CRUD	CRUD	R	R	R
OrderDeliveryMethod	R	R	R	CRUD	CRUD
OrderSummary	R	R	R	R	R
PaymentAuthorization	—	R	—	R	R
PaymentGateway	—	—	—	CRUD	CRUD
PaymentGatewayLog	—	—	—	R	R
PaymentGroup	—	—	—	R	R
PriceAdjustmentSchedule	—	—	—	CRUD	CRUD
Pricebook2 (Label: Price Books)	R	R	R	CRUD	CRUD
Product2 (Label: Products)	R	R	R	CRUD	CRUD
ProductCatalog (Label: Catalogs)	R	R	R	CRUD	CRUD
ProductCategory (Label: Categories)	R	R	R	CRUD	CRUD

Entity	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (D2C stores only)	Merchandiser	Commerce Admin
ProductCategoryProduct	R	R	R	CRUD	CRUD
Promotion	—	—	—	CRUD	CRUD
PromotionMarketSegment	—	—	—	CRUD	CRUD
PromotionQualifier	—	—	—	CRUD	CRUD
PromotionSegment	—	—	—	CRUD	CRUD
PromotionTarget	—	—	—	CRUD	CRUD
PromotionTier	—	—	—	CRUD	CRUD
UserExternalCredential	—	—	CRUD	• Default: — • Editable: CRUD	• Default: — • Editable: CRUD
WebCart (Label: Carts)	CRUD	CRUD	R	R	R
WebStore (Label: Stores)	R	R	R	RU	CRUD
WebStoreBuyerGroup (Label: Store Buyer Groups)	—	—	—	CRUD	CRUD
WebStoreCatalog (Label: Store Catalogs)	R	R	R	CRUD	CRUD
WebStorePricebook (Label: Store Pricebooks)	—	—	—	CRUD	CRUD
Wishlist	CRUD	CRUD	CRUD	CRUD	CRUD

SEE ALSO:

B2B and D2C Commerce Permission Sets

Preconfigured Permission Sets for B2B and D2C Commerce

Order Management and Omnichannel Inventory

EDITIONS

Available in: Lightning Experience and mobile devices

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

You can use Salesforce Order Management and Salesforce Omnichannel Inventory with B2B Commerce and D2C Commerce. Order Management helps you manage your orders throughout the order lifecycle, from creation to fulfillment to servicing. Omnichannel Inventory delivers real-time inventory availability data, helping you avoid costly undersells and oversells.

You must purchase an Order Management license to use B2B Commerce with Order Management. D2C Commerce comes with only a limited set of Order Management functionality. To use the full functionality of Order Management with D2C Commerce, you must purchase an Order Management license.

Note: B2B Commerce and D2C Commerce can place orders containing more than 200 line items. Order Management, however, doesn't support routing, capturing payments, and creating invoices for orders that contain over 200 line items.

For information about implementing Order Management, see Salesforce Order Management Implementation Guide for B2B and D2C Commerce.

For information about using Order Management, see Salesforce Order Management Help.

For information about implementing Omnichannel Inventory, see Salesforce Omnichannel Inventory Implementation Guides.

For information about using Omnichannel Inventory, see Omnichannel Inventory Help.

Pay-As-You-Go Usage Types for D2C Commerce and PayNow Stores

Pay-As-You-Go helps you track your usage for D2C Commerce and PayNow stores, and get billed monthly based on the usage.

Available in: **Enterprise** and **Unlimited** Editions

Available in: D2C Commerce

Usage Types

Pay-As-You-Go offers these metric-defined usage types.

Usage Type	Definition
D2C	A store that sells directly to an end customer.
PayNow	A store that uses Salesforce Payments, an online payment solution. You can deploy only one PayNow storefront at a time.

GMV Calculations

The monthly GMV for D2C Commerce and PayNow is calculated based on the value of orders created in the store, excluding tax and shipping fees. The GMV is tracked in Digital Wallet, and your org is billed monthly. Digital Wallet is a free account management tool that offers near real-time consumption data for enabled products across your active contracts.

The rate card describes how your org's usage of D2C Commerce and PayNow is calculated.

For more information on how usage is billed, refer to your contract or contact your account executive.

SEE ALSO:

GMV

About Digital Wallet

Get Started with Salesforce Commerce

Watch a video introduction to setting up a store. Prepare your org for Commerce and create a store. Get a draft of your store up and running. Discover resources that can help you learn more about commerce features and functionality.

You can download a PDF version of the Salesforce Commerce Quick Start Guide, which includes an overview of store setup steps and links to other Commerce resources.

Video: Get Started with Salesforce Commerce

Watch the video for an overview of how to set up a store.

Set Up a Commerce Store

Use automated setup and guided tasks to get a store set up.

Commerce Store Learning Map

Learn about the possibilities with Salesforce Commerce. Design a store website that showcases your brand and offers engaging customer experiences. Add products to the store, and configure the tax, shipping, and payment services. Optimize store performance using SEO, insights, and recommended actions.

Enable the Refreshed Commerce App

Starting in Summer '24, Salesforce offers a refreshed Commerce app. We recommend rolling out the refreshed app to your business users to take advantage of the latest innovations in the Commerce experience.

Prepare Your Org for Commerce

Use the Commerce Setup Assistant to automatically configure org preferences, sharing settings, object layouts, and other settings that enable and optimize your org for Commerce.

Start Selling Online

The store is where shoppers and buyers go to view, select, and purchase your products. We provide B2B and D2C store templates to get you started. We also provide a template for a reorder portal you can embed into your sales or service cycles to make it easy for your customers to place reorders.

Video: Get Started with Salesforce Commerce

Watch the video for an overview of how to set up a store.

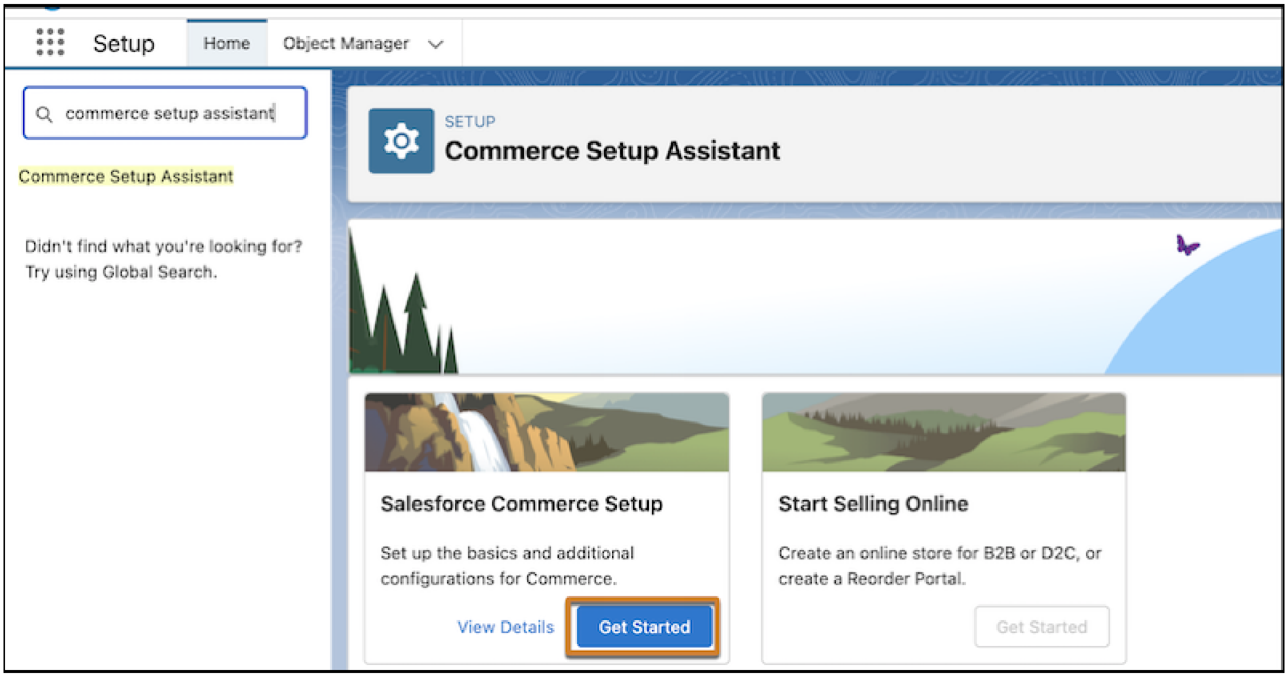
Watch a video

Set Up a Commerce Store

Use automated setup and guided tasks to get a store set up.

1. Configure your Salesforce org for Commerce.

   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, enter and select `Commerce Setup Assistant`.
   c. On the Salesforce Commerce Setup tile, click **Get Started**.



Didn't find what you're looking for? Try using Global Search.

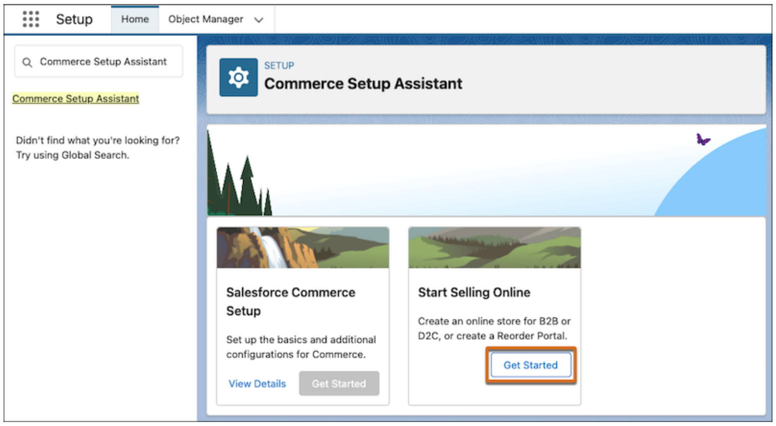
Set up the basics and additional configurations for Commerce.

Create an online store for B2B or D2C, or create a Reorder Portal.

   d. Follow the prompts. Review and approve changes before anything happens automatically.
   Your Commerce org is configured and is ready to use.

2. Create your store using the Commerce Setup Assistant.
   a. On the Start Selling Online tile, click **Get Started**.
   b. Choose the type of store that you want to create.
   c. Follow the prompts.

   For detailed instructions, see Create a Store or Reorder Portal.



Didn't find what you're looking for? Try using Global Search.

Set up the basics and additional configurations for Commerce.

Create an online store for B2B or D2C, or create a Reorder Portal.

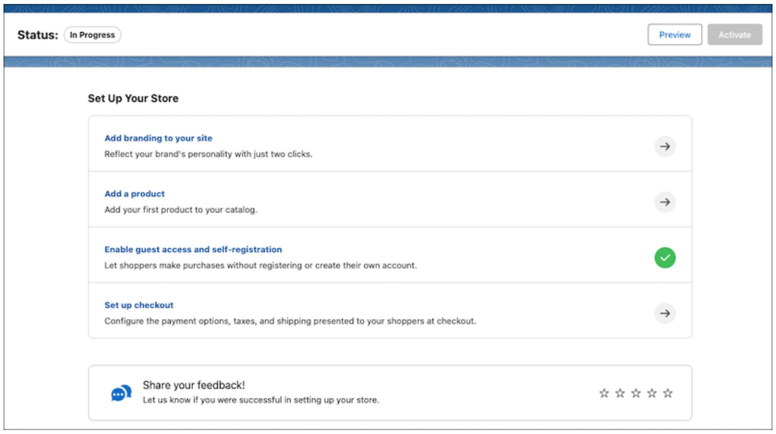
When your store is created, you land on the store home page. The remaining tasks to get your store up and running are listed on the page.

3. Click each task on the store home page and follow the prompts.

   To see what your store looks like at any stage of the process, click **Preview**.

   For information about when the setup tasks are considered to be complete, see Commerce Store Setup Tasks.

   For information about configuring managed checkout for a D2C store, see Configure Managed Checkout for a D2C Store.



Set Up Your Store

Add branding to your site
Reflect your brand's personality with just two clicks.

Add a product
Add your first product to your catalog.

Enable guest access and self-registration
Let shoppers make purchases without registering or create their own account.

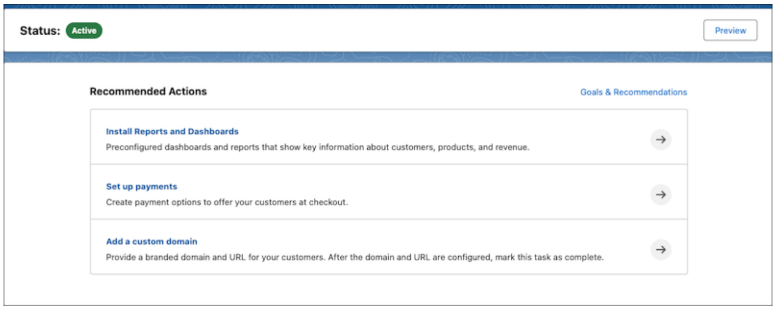
Set up checkout
Configure the payment options, taxes, and shipping presented to your shoppers at checkout.

Share your feedback!
Let us know if you were successful in setting up your store.

4. When you've completed the setup tasks, click **Activate** to see what the store looks like or show it to colleagues.

   To optimize security, scalability, and performance, configure a custom domain and CDN before you go live to customers.

5. To keep getting your store ready for customers, follow the recommended actions on the store home page.



Recommended Actions

Install Reports and Dashboards
Preconfigured dashboards and reports that show key information about customers, products, and revenue.

Set up payments
Create payment options to offer your customers at checkout.

Add a custom domain
Provide a branded domain and URL for your customers. After the domain and URL are configured, mark this task as complete.

Commerce Store Learning Map

Learn about the possibilities with Salesforce Commerce. Design a store website that showcases your brand and offers engaging customer experiences. Add products to the store, and configure the tax, shipping, and payment services. Optimize store performance using SEO, insights, and recommended actions.

Learn About Commerce

Salesforce Help: Commerce Basics

Developer Guide: B2B and D2C Commerce Data Model

Trailhead: Salesforce Reorder Portal: Quick Look

Trailhead: Salesforce D2C Commerce for Developers

Trailhead: Configure Your B2B and D2C Commerce Store

Trailhead: Salesforce Order Management for Salesforce Commerce

Get Started

Salesforce Help: Get Started with Salesforce Commerce

Salesforce Help: Prepare Your Org for Commerce

Salesforce Help: Start Selling Online

PDF: Salesforce Omnichannel Inventory Implementation Guide for B2B and D2C Commerce

PDF: Salesforce Order Management Implementation Guide for B2B and D2C Commerce

Manage Products

Salesforce Help: Products

Salesforce Help: Product Sets

Salesforce Help: Product Categories

Salesforce Help: Import and Export Commerce Data

*Salesforce Help:*Manage Products in the Product Workspace

Configure Checkout

Salesforce Help: Configure Managed Checkout for a D2C Commerce Store

Salesforce Help: Custom Checkout for a Commerce Store

Salesforce Help: Customize Checkout

Trailhead: Salesforce Payments for Administrators

Trailhead: Salesforce D2C Commerce for Developers

Design Your Website

Salesforce Help: Brand a Commerce Store

Salesforce Help: Use Experience Builder to Customize Your Store

Salesforce Help: Commerce Store Components

Developer Guide: Build Custom Components

Optimize Your Store

Salesforce Help: Get Recommendations to Improve Store Performance

Salesforce Help: Store Search

Salesforce Help: Search Engine Optimization (SEO) for Commerce

Salesforce Help: Improve Store Performance with Commerce Intelligence

Salesforce Help: Commerce Einstein

Salesforce Help: AI-Powered Search for Commerce

Salesforce Help: Improve Page Performance During Add-to-Cart in a Commerce Store

Enable the Refreshed Commerce App

Starting in Summer ’24, Salesforce offers a refreshed Commerce app. We recommend rolling out the refreshed app to your business users to take advantage of the latest innovations in the Commerce experience.

The refreshed app provides new navigation and features to help you more easily manage your online business.

- Navigate through the app with ease using persistent left navigation, which keeps you on track with access to all the functions and features.
- Switch between stores easily or create a store with the new store switcher dropdown.

- Use the brand-new store home page.
  - The redesigned and expanded store setup assistant on the home page guides you through the tasks you must complete to get your store up and running.
  - The home page header displays the store status.
  - New quick access buttons let you or preview and activate your store without going through Experience Builder or store settings.
  - When your store goes live, the home page displays dynamic recommendations to help you optimize your online business.
- Easily manage your store's data and content with our reworked workspaces, which are automatically filtered by store.
- Customize the refreshed app by adding items to the navigation and using Lightning App Builder for record pages.

1. Turn on the refreshed app.

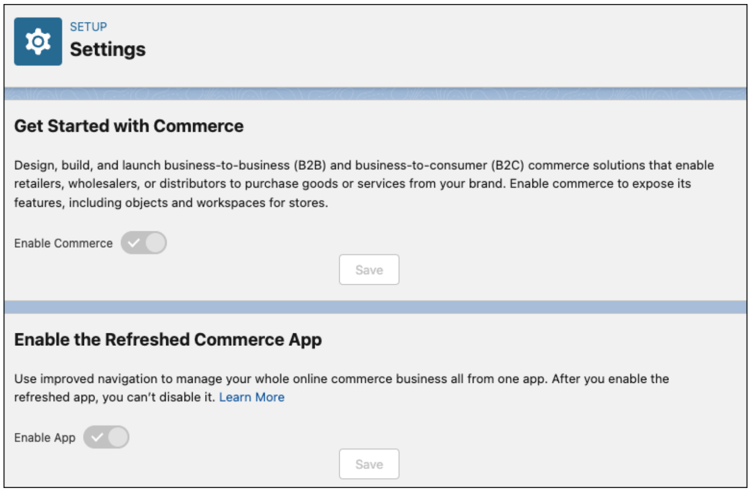
   After you enable the refreshed app, you can't disable it.

   a. Click ⚙ at the top of the page, and then select **Setup**.

   b. In the Quick Find box, enter `Feature Settings`, and select **Commerce** > **Settings**.

   c. Under Settings, turn on **Enable the Refreshed Commerce App**.

   In the App Launcher, the refreshed app is listed as Commerce. The previous app is named "Commerce Storefront Console."



Get Started with Commerce

Design, build, and launch business-to-business (B2B) and business-to-consumer (B2C) commerce solutions that enable retailers, wholesalers, or distributors to purchase goods or services from your brand. Enable commerce to expose its features, including objects and workspaces for stores.

Enable the Refreshed Commerce App

Use improved navigation to manage your whole online commerce business all from one app. After you enable the refreshed app, you can't disable it. Learn More

2. (Optional) Add your customized pages to the refreshed app.

   If you've customized the Commerce home, store home, or record page, you can use the pages in the refreshed app.

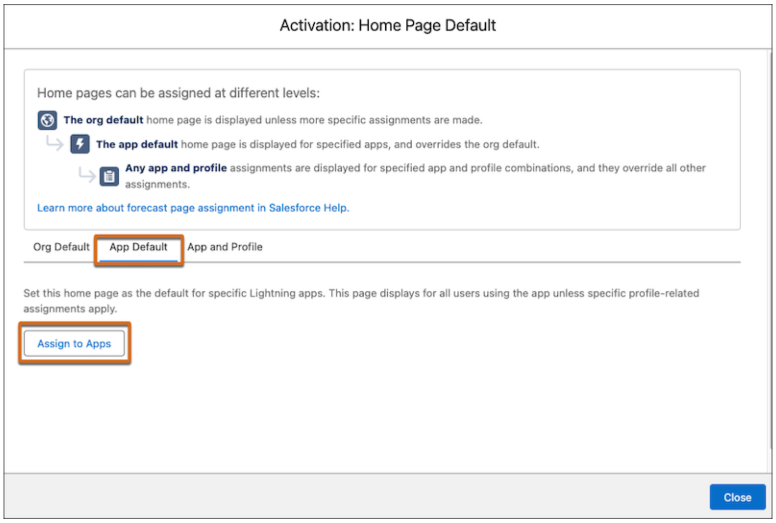
   a. Navigate to the customized store home, commerce home, or record page that you want to add.

   b. From Setup, click **Edit Page**.

   c. Click **Save**.

   d. Click **Activate**.

   e. Click **App Default**, and click **Assign to Apps**.



Activation: Home Page Default

Home pages can be assigned at different levels:

The org default home page is displayed unless more specific assignments are made.

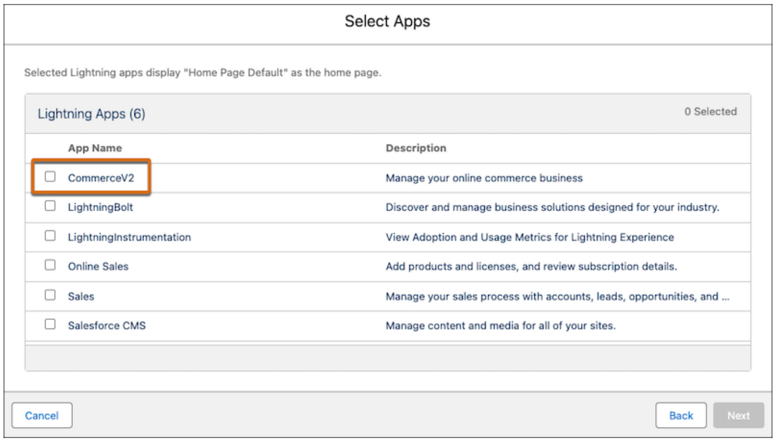
The app default home page is displayed for specified apps, and overrides the org default.

Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.

Learn more about forecast page assignment in Salesforce Help.

Set this home page as the default for specific Lightning apps. This page displays for all users using the app unless specific profile-related assignments apply.

f. Select **CommerceV2** and click **Next**.



Select Apps

Selected Lightning apps display "Home Page Default" as the home page.

Lightning Apps (6) 0 Selected

	App Name	Description
☐	CommerceV2	Manage your online commerce business
☐	LightningBolt	Discover and manage business solutions designed for your industry.
☐	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☐	Online Sales	Add products and licenses, and review subscription details.
☐	Sales	Manage your sales process with accounts, leads, opportunities, and ...
☐	Salesforce CMS	Manage content and media for all of your sites.

g. Click **Save**.

h. Repeat these steps for each record, store home, or commerce home page that you want to use in the refreshed app.

i. Exit the Lightning App Builder.

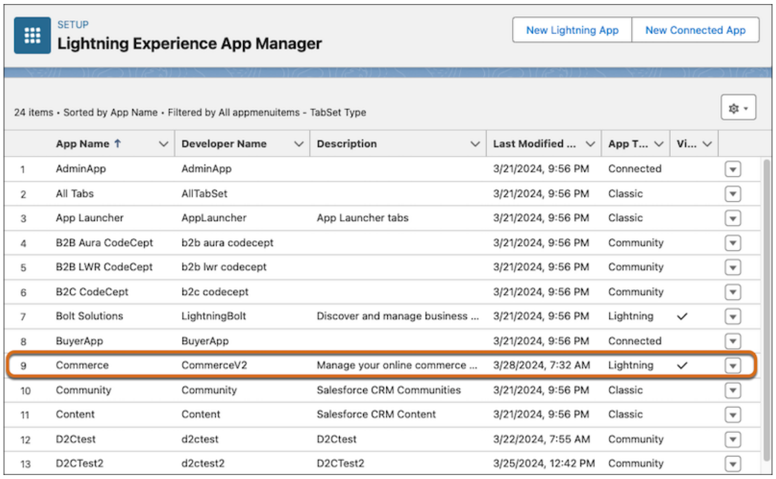
3. (Optional) Make your customized store home or commerce home page visible in the refreshed app.

   This step isn't required for customized record pages after completing the previous step.

   a. Click ⚙ at the top of the page, and then select **Setup**.

   b. In the Quick Find box, enter `App Manager` and select **App Manager**.

   c. Locate the row that has Commerce as the App Name and CommerceV2 as the Developer Name, and click **Edit** from the dropdown.



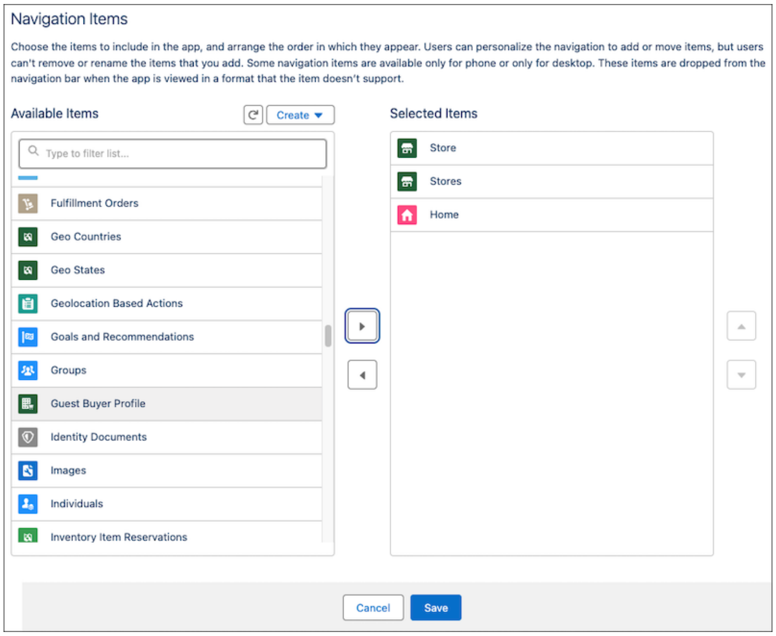
24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App T...	Vi...
1	AdminApp	AdminApp		3/21/2024, 9:56 PM	Connected	
2	All Tabs	AllTabSet		3/21/2024, 9:56 PM	Classic	
3	App Launcher	AppLauncher	App Launcher tabs	3/21/2024, 9:56 PM	Classic	
4	B2B Aura CodeCept	b2b aura codecept		3/21/2024, 9:56 PM	Community	
5	B2B LWR CodeCept	b2b lwr codecept		3/21/2024, 9:56 PM	Community	
6	B2C CodeCept	b2c codecept		3/21/2024, 9:56 PM	Community	
7	Bolt Solutions	LightningBolt	Discover and manage business ...	3/21/2024, 9:56 PM	Lightning	✓
8	BuyerApp	BuyerApp		3/21/2024, 9:56 PM	Connected	
9	Commerce	CommerceV2	Manage your online commerce ...	3/28/2024, 7:32 AM	Lightning	✓
10	Community	Community	Salesforce CRM Communities	3/21/2024, 9:56 PM	Classic	
11	Content	Content	Salesforce CRM Content	3/21/2024, 9:56 PM	Classic	
12	D2Ctest	d2ctest	D2Ctest	3/22/2024, 7:55 AM	Community	
13	D2CTest2	d2ctest2	D2CTest2	3/25/2024, 12:42 PM	Community	

d. Select **Navigation Items**.

e. Move the pages that you want to make visible from Available Items to Selected Items.

The Stores (plural) item represents your customized store page. Store (singular) is the page that's already in the refreshed app.



Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

f. Save your changes and exit the Lightning App Builder.
The pages that you selected now appear as tabs in the refreshed app. If you don't see the tabs, log out and log in again.

4. Turn off access to the Commerce Storefront Console app.

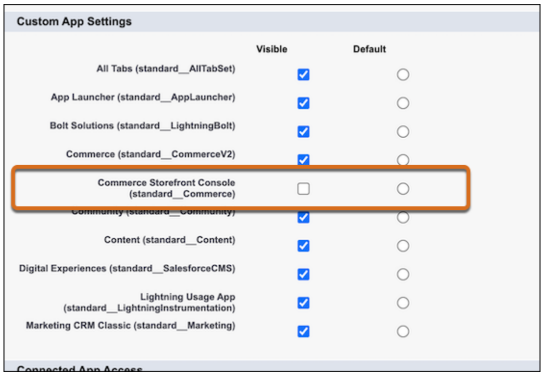
To avoid confusion for your business users, remove visibility to the previous app.

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

b. Click the profile used for your business users.

For example, Commerce Business User.

c. Under Custom App Settings, deselect **Commerce Storefront Console** and save your changes.



Custom App Settings

	Visible	Default
All Tabs (standard__AllTabSet)	☑	○
App Launcher (standard__AppLauncher)	☑	○
Bolt Solutions (standard__LightningBolt)	☑	○
Commerce (standard__CommerceV2)	☑	○
Commerce Storefront Console (standard__Commerce)	☐	○
Community (standard__Community)	☑	○
Content (standard__Content)	☑	○
Digital Experiences (standard__SalesforceCMS)	☑	○
Lightning Usage App (standard__LightningInstrumentation)	☑	○
Marketing CRM Classic (standard__Marketing)	☑	○

Connected App Access

5. (Optional) Customize the refreshed app.

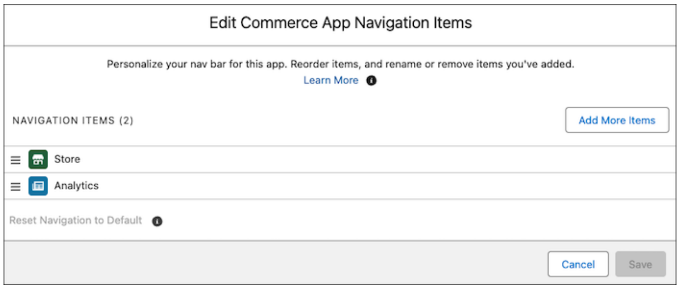
   In the refreshed app, you can customize the navigation, but the changes apply only to your own usage. The changes don't apply to other users.

   a. In the top right of the screen, click the pencil icon.

   b. Reorder or add navigation items.

      See Personalize the Navigation Bar in Lightning Experience.

      When you customize the navigation, the store context that you're working in doesn't persist between navigation tabs. For example, if you change stores in the Store tab and then go to the Products workspace, you must change the store there too.



Edit Commerce App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.

SEE ALSO:

Activate Lightning Experience Record Pages

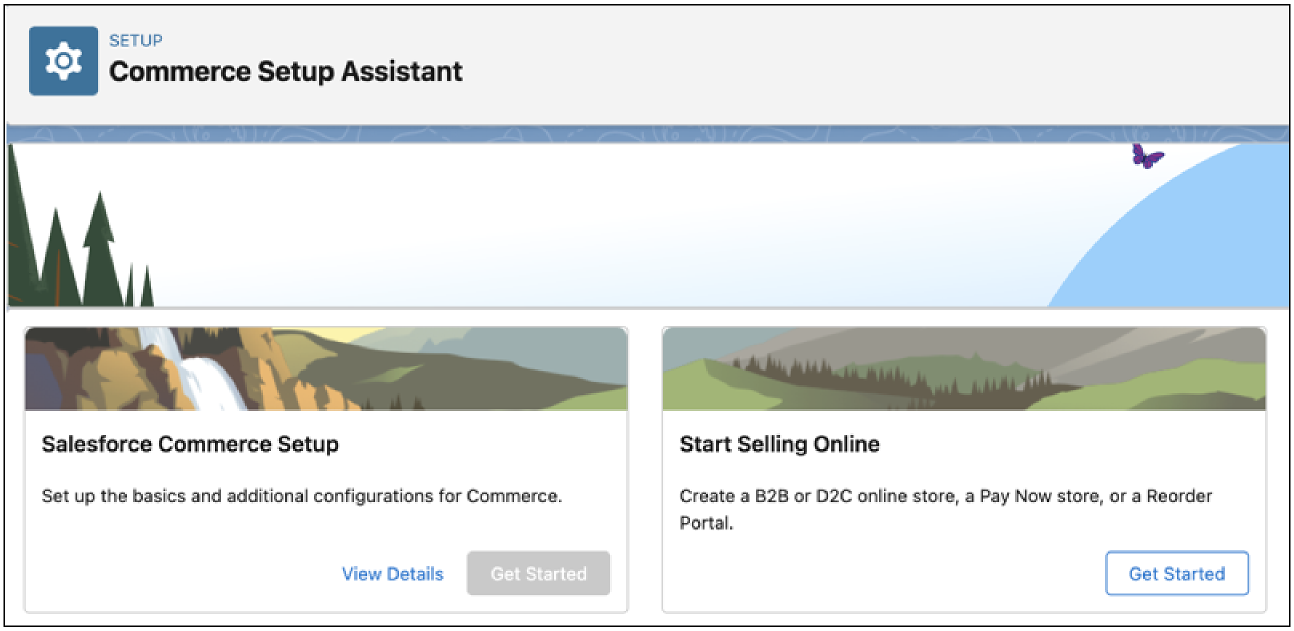
Activate Lightning Experience Home Pages

View and Edit Assigned Apps in Profiles

Prepare Your Org for Commerce

Use the Commerce Setup Assistant to automatically configure org preferences, sharing settings, object layouts, and other settings that enable and optimize your org for Commerce.

To access the Commerce Setup Assistant, from Setup, in the Quick Find box, enter `Commerce Setup Assistant`. From the **Salesforce Commerce Setup** tile, click **Get Started** or **View Details** for more information.


SETUP
Commerce Setup Assistant
Salesforce Commerce Setup
Set up the basics and additional configurations for Commerce.
View Details
Get Started
Start Selling Online
Create a B2B or D2C online store, a Pay Now store, or a Reorder Portal.
Get Started

Salesforce Commerce Basic Setup

The Commerce Setup Assistant automatically completes the basic steps to set up commerce. For more information, review details about profiles, permissions, users, and sharing settings.

Salesforce Commerce Additional Setup

After you set up Salesforce with Commerce, consider adding additional features.

Commerce Setup Assistant

Commerce Setup Assistant automates the setup process, saving you time and effort. If you already set up Commerce, you can also run Commerce Setup Assistant to optimize it.

Salesforce Commerce Basic Setup

The Commerce Setup Assistant automatically completes the basic steps to set up commerce. For more information, review details about profiles, permissions, users, and sharing settings.

Create a Shopper Profile and Permission Set Group

A shopper is an external user with restricted permissions who can visit your D2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

Configure Internal Users for Commerce

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.

Sharing Settings for Commerce, Location, and Location Group Objects

Configure these defaults internal and external access settings for Commerce, Location, and Location Group objects.

Create a Shopper Profile and Permission Set Group

A shopper is an external user with restricted permissions who can visit your D2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

1. Clone the External Apps Login User profile.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Profiles`, and then select **Profiles**.
    c. Next to External Apps Login User, select **Clone**.
    d. For Profile Name, enter `Shopper Profile`.

       You can choose another name, but keep in mind that this profile is used for your shoppers.
    e. Click **Save**.
2. Create a shopper permission set group.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Permission Set Groups`, and then select **Permission Set Groups**.
    c. Click **New Permission Set Group**.
    d. For Label, enter `Shopper PSG`.

       You can choose another name, but keep in mind that this permission set group is used for your shoppers.
    e. Click **Save**.
    f. On the Permission Set Groups page, in the Permission Sets section, click **Permissions Sets in Group**.
    g. Select the **Shopper** permission set, and click **Add**.
    h. Click **Done**.

SEE ALSO:

Profiles

Permission Set Groups

Configure Internal Users for Commerce

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.

Note: When configuring profiles, some admins prefer to work in the original profile user interface while others prefer the enhanced profile user interface. To ensure that all the profile settings are easily accessible, we recommended you disable the enhanced profile user interface.

These instructions assume you're working with the original profile user interface.

1. Clone the Identity User profile.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Profiles`, and then select **Profiles**.

   c. Next to Identity User, select **Clone**.
   d. 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.

   e. 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 in the Digital Experiences app, select **Visible**.
   c. In the Tab Settings section, change these items to **Default On**.
      - Accounts
      - Buyer Groups
      - Catalogs
      - Categories
      - CMS Channels
      - CMS Workspaces
      - Commerce Setup
      - Customer Workspace
      - Entitlement Policies
      - Guest Buyer Profile
      - Order Delivery Methods
      - Orders
      - Order Summaries
      - Price Adjustment Schedules
      - Price Books
      - Pricing Workspace
      - Promotion Workspace
      - Products
      - Product Workspace
      - Store Price Books
      - Stores
   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.

Note: Both the Commerce Admin permission set and the Merchandiser permission set allow access to buyer groups. Users who have access to buyer groups also have read access to all related buyer group members.

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.

SEE ALSO:

Profiles

Sharing Settings for Commerce, Location, and Location Group Objects

Configure these defaults internal and external access settings for Commerce, Location, and Location Group objects.

Object	Default Internal Access for B2B and D2C	Default External Access for B2B and D2C
Account and Contract	Public Read/Write	Private
Buyer Group	Public Read/Write	Private
Catalog	Public Read/Write	Private
Electronic Media Group	Public Read Only	Public Read Only
Entitlement Policy	Public Read/Write	Private
Location and Location Group	Public Read/Write	Public Read/Write
Order	Public Read/Write	Private
Order Delivery Method	Public Read Only	Public Read Only
Order Summary	Controlled by Parent	B2B: Private or Controlled by Parent, D2C: Controlled by Parent
Product	Public Read/Write	Private For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren't authorized to access.

If you're configuring your Salesforce org by using Commerce Setup Assistant for the first time or reconfiguring, sharing settings are automatically set up. To set up sharing settings manually or through the Commerce Setup Assistant, see Sharing Settings on page 40.

SEE ALSO:

Sharing Settings

Salesforce Commerce Additional Setup

After you set up Salesforce with Commerce, consider adding additional features.

To add more features, go to the Commerce Setup Assistant setup page. On the Salesforce Commerce Setup tile, click **View Details**, and go to the Additional Setup tab to enable these additional features.

- Person accounts to represent shoppers as customers
- Order routing to manage inventory and orders
- Preconfigured dashboards and reports for Business Overview, Commerce Finance, Commerce Payment, and Commerce Promotions

- State and country picklists
- Multiple currencies
- Multi-factor authentication
- Buyer manager accounts
- Price book entry layout

Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores

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.

Add Related Lists to the Price Book Entry Page for Commerce

To optimize the Commerce experience, customize the Price Book Entry page to add Active Price Adjustment and Product Selling Model related lists.

Enable Person Accounts for Commerce

Person accounts are required for D2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. You can either set up person accounts through the automated process from the Commerce Setup Assistant setup page or manually. This topic describes the steps to use to enable person accounts manually, without using Commerce Setup Assistant.

Enable State and Country Picklists

Stores based on the LWR (Lighting Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.

SEE ALSO:

Enable Person Accounts for Commerce

Enable and Disable State and Country/Territory Picklists

Enable Multiple Currencies

Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores

Add Related Lists to the Price Book Entry Page for Commerce

Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores

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.

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.

Note: Users assigned to an account switcher permission set based on the buyer manager permission set can create, edit, and delete addresses on accounts they have access to. Users assigned to an account switcher permission set based on the buyer permission set have only read access to addresses on the other accounts.

Buyer users require a Customer Community license or a license with a higher level of privileges. Buyer managers and account switchers require a Customer Community Plus license or a license with a higher level of privileges.

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.

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.

SEE ALSO:

Manage Buyer Access to B2B Stores

Add Related Lists to the Price Book Entry Page for Commerce

To optimize the Commerce experience, customize the Price Book Entry page to add Active Price Adjustment and Product Selling Model related lists.

1. From the Object Manager, enter `Price Book Entry` in the Quick Find box.
2. Select **Price Book Entry** > **Page Layouts** > **Price Book Entry**.
3. In Layout Properties, select **Related Lists**.
4. Drag **Active Price Adjustment** and **Product Selling Model** to the **Related Lists** section at the bottom of the page.
5. Click **Save As**, and save the layout as `Commerce Price Book Entry`.

SEE ALSO:

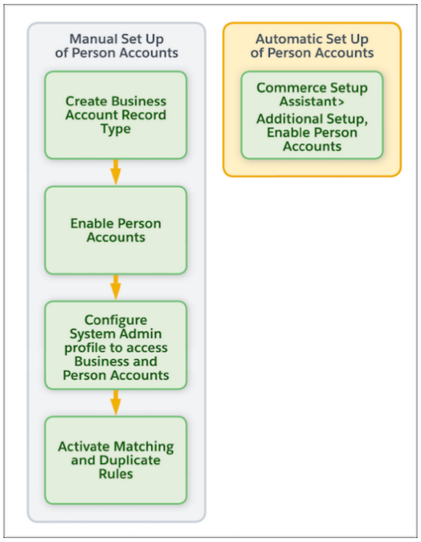
Page Layouts

Enable Person Accounts for Commerce

Person accounts are required for D2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. You can either set up person accounts through the automated process from the Commerce Setup Assistant setup page or manually. This topic describes the steps to use to enable person accounts manually, without using Commerce Setup Assistant.

If you're configuring your Salesforce org by using Commerce Setup Assistant for the first time or reconfiguring, setting up person accounts is a simple and automated task. To set up person accounts from the Commerce Setup Assistant, see Automate Person Accounts for Guest Access on page 43.

Here's a quick look at what is the difference between manual and automatic set up of person accounts.


Manual Set Up of Person Accounts
Create Business Account Record Type
Enable Person Accounts
Configure System Admin profile to access Business and Person Accounts
Activate Matching and Duplicate Rules
Automatic Set Up of Person Accounts
Commerce Setup Assistant> Additional Setup, Enable Person Accounts

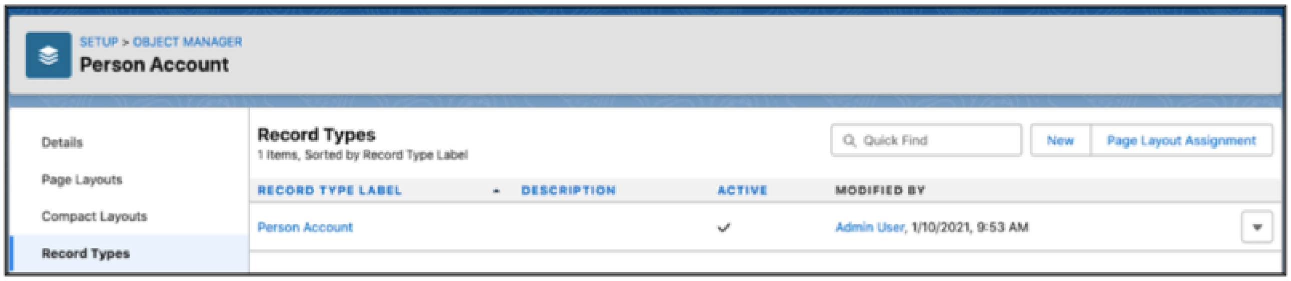
In some cases, when you add D2C Commerce to an existing B2B Commerce and Salesforce Order Management implementation, Person Accounts is already enabled. If so, skip these steps.

Important: After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how Person Accounts affect your Salesforce org.

1. Create the Business Account record type.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Object Manager`, and then select **Account**.
    c. Click **Record Types**.
    d. Click **New**.
    e. For Record Type Label, enter a name (for example, `Business Account`).

       You don't have to use Business Account as the name. However, keep in mind that this record type is used for businesses, not shoppers. After you create a Business Account, you can associate it with multiple contacts (individual employees working for the business).
    f. Click **Next**.
    g. Select a page layout, and click **Save**.
2. Enable Person Accounts.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Person Accounts` and then select **Person Accounts**.
    c. Go through the steps listed on the Setup page.
    d. Turn on Person Accounts.
3. Verify that Person Accounts are enabled.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Object Manager`, and then select **Person Account**.
    c. Click **Record Types**.

d. Verify that the Person Account record type is listed.



1 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Person Account		✓	Admin User, 1/10/2021, 9:53 AM

If you don't see the Person Account record type, contact Salesforce Support.

4. Configure the System Administrator profile.

   The System Administrator profile requires access to the Business Account record type and the Person Account record type.

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

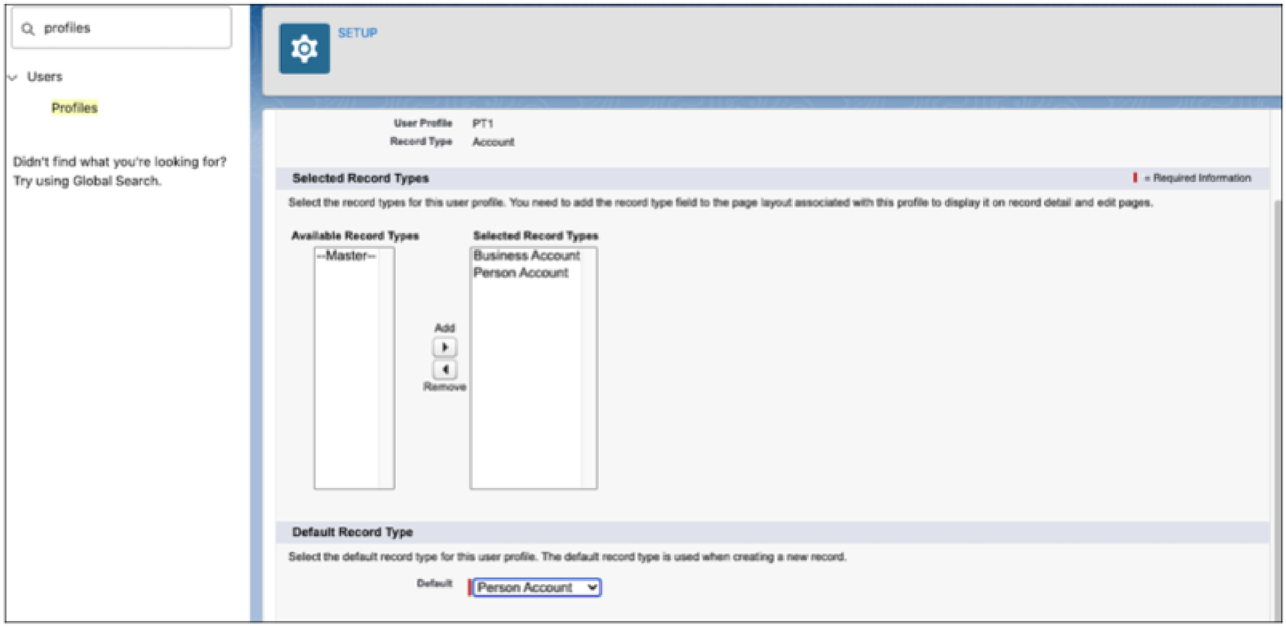
   b. Click **System Administrator**.

   c. Scroll down to Record Type Settings, and read the text next to Accounts.

   d. Click **Edit**.

   e. Make sure that Business Account and Person Account are in the Selected Record Types list on the right.

   f. Under Default Record Type, select **Person Account** as the default.



User Profile PT1
Record Type Account

Select the record types for this user profile. You need to add the record type field to the page layout associated with this profile to display it on record detail and edit pages.

Selected Record Types: Business Account, Person Account

Select the default record type for this user profile. The default record type is used when creating a new record.

Default: Person Account

   g. Click **Save**.

5. To identify and match duplicate person accounts, activate the standard person account matching and duplicate rules. If you're using Commerce Setup Assistant to enable person accounts, the standard person account matching and duplicate rules are automatically activated.

SEE ALSO:

Person Accounts

Enable State and Country Picklists

Stores based on the LWR (Lighting Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.

For information about enabling state and Country picklists, see Enable and Disable State and Country/Territory Picklists.

Commerce Setup Assistant

Commerce Setup Assistant automates the setup process, saving you time and effort. If you already set up Commerce, you can also run Commerce Setup Assistant to optimize it.

To access the Commerce Setup Assistant, from Setup, in the Quick Find box, enter and select **Commerce Setup Assistant**. From the Salesforce Commerce Setup tile, click **Get Started** or **View Details**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Using Commerce Setup Assistant to Set Up Features

Commerce Setup Assistant automates setting up these features. However, you can also choose to set them up manually.

Sharing Settings

The Commerce Setup Assistant automates the sharing settings for Commerce objects, such as Account and Contract, Order, Product, and Location and Location Group objects.

Profiles and Permission Sets Enabled by Commerce Setup Assistant

Commerce Setup Assistant automates enabling the required profiles and permission sets. However, you can also choose to set them up manually.

Page Layouts Created by Commerce Setup Assistant

Commerce Setup Assistant automates creating page layouts for the Account, Order, and Product pages. However, you can also choose to create the layouts manually.

Configured Order-Related Flow Templates

Commerce Setup Assistant automatically configures order-related flows, which makes it easy for your customers to cancel or return items.

Payments Digital Experience Site

Commerce Setup Assistant automatically sets up an Experience Cloud site as a data channel between the payment gateway and Salesforce Payments.

Automate Person Accounts for Guest Access

Person accounts provide a more personalized shopping experience and enable guest shoppers to access your store without creating an account. When you automate person account setup, you don’t need to manually configure System Administrator profile access to the Business Account Person Account record types. If you have a D2C store, you must set up person accounts. For a B2B store, you can enable person accounts only if you let guest shoppers use your store.

Commerce Order Routing

Enhance how you manage your inventory and orders by enabling order routing.

Dashboards and Reports Installation

Get insights on your customer behavior, product performance, and revenue data by installing reports and dashboards in one click.

Commerce Setup Assistant Troubleshooting

Commerce Setup Assistant takes only a few minutes to prepare your org for Commerce. However, occasionally the setup can fail or only partially complete. Common reasons include missing org permissions and licenses or unassigned profiles or permission sets.

Using Commerce Setup Assistant to Set Up Features

Commerce Setup Assistant automates setting up these features. However, you can also choose to set them up manually.

Note: If you're setting up the Commerce app and the other features manually, first enable Digital Experiences.

Feature	Automated Setup	Manual Setup Instructions
Commerce app	Enables the refreshed Commerce app for new and existing customers. Installs and configures licenses, features, profiles, permissions, and other required settings. Assigns Commerce Admin permission set to the System Admin users.	Go to **Setup** > **Feature Settings** > **Commerce** > **Settings**, and enable Commerce. If you're an existing customer, enable Commerce and then enable the refreshed Commerce app on the same page.
Experience Cloud	Enables Experience Cloud.	Go to **Setup** > **Feature Settings** > **Digital Experiences** > **Settings**, and then select **Enable Digital Experiences**.
Salesforce Payments	Enables Salesforce Payments.	Go to **Setup** > **Feature Settings** > **Payments**, and then click **Enable**.
Order Management	Enables Order Management and these Order settings: • Enhanced orders • Enhanced commerce orders • Optional price books • Negative quantity • Zero quantity • Order events	Go to **Setup** > **Feature Settings** > **Order Management** > **Setup**, and turn on Order Management. In Setup, find and select **Order Settings**, and enable these settings: • Enhanced orders • Enhanced commerce orders • Optional price books • Negative quantity • Zero quantity • Order events
Omnichannel Inventory	Enables Omnichannel Inventory and creates a Warehouse type and location.	Go to **Setup** > **Feature Settings** > **Omnichannel Inventory**, and turn on Omnichannel Inventory. Then, go to **Setup** > **Object Manager** > **Location** > **Fields & Relationships** > **Location Type**, and add new Location Type Picklist Values.

Feature	Automated Setup	Manual Setup Instructions
HTTP security settings	Adds an extra layer of security by ensuring that cookies can be accessed only through HTTP requests. This security setting keeps your site safe from session hijacking or cross-site scripting.	Go to **Setup** > **Security** > **Session Settings**, and select **Require HttpOnly attribute**.

SEE ALSO:

Commerce Setup Assistant Troubleshooting

Sharing Settings

The Commerce Setup Assistant automates the sharing settings for Commerce objects, such as Account and Contract, Order, Product, and Location and Location Group objects.

Go to **Setup** > **Security** > **Sharing Settings**. Under Organization-Wide Defaults, click **Edit** and modify the defaults.

SEE ALSO:

Sharing Settings for Commerce, Location, and Location Group Objects

Profiles and Permission Sets Enabled by Commerce Setup Assistant

Commerce Setup Assistant automates enabling the required profiles and permission sets. However, you can also choose to set them up manually.

Profile	Automated Setup	Manual Setup Instructions
Commerce Business User	This profile is used to create internal users, such as Commerce admins and merchandisers.	Go to **Setup** > **Users** > **Profiles**. Create a profile named Commerce Business User Profile and then configure the profile for your internal users. See Configure Internal Users for Commerce.
Omnichannel Inventory Manager	Provides access to Omnichannel inventory features.	Go to **Setup** > **Permission Sets** > **Omnichannel Inventory Manager**, and click **Manage Assignments**. Click **Add Assignments**, and assign users to the permission set. Assigning the Omnichannel Inventory Manager permission set also assigns an Omnichannel Inventory license to that user.
System Administrator	Provides access to setup functionality, including tasks related to users, profiles, and order-related objects.	Go to **Setup** > **Profiles** > **System Administrator**. Click **Edit** and set up field-level security for Order, Order Product, Shipment, Shipment Item, Order Adjustment Group, and Order Delivery Group. For details about the access levels,

Profile	Automated Setup	Manual Setup Instructions
		see the Configure Location Field-Level Security topic in Salesforce Order Management Implementation Guide for B2B and D2C Commerce.
Payments Administrator	This profile can configure and manage Salesforce Payments, merchant accounts, and payment method sets.	Go to **Setup** > **Permission Sets** > **Payments Administrator**, and then click **Manage Assignments**. Add the System Administrator.

SEE ALSO:

Profiles

Page Layouts Created by Commerce Setup Assistant

Commerce Setup Assistant automates creating page layouts for the Account, Order, and Product pages. However, you can also choose to create the layouts manually.

Layout	Automated Setup	Manual Setup Instructions
Account page	Creates the Commerce Account Layout that helps you manage a customer account, including contact point addresses and buyer groups.	Go to **Setup** > **Object Manager** > **Account** > **Page Layouts**, and create a Commerce Account Layout. Add related lists for Contact Point Addresses and Buyer Groups. Return to Page Layouts and select **Page Layout Assignment** > **Edit Assignment**. Assign the layout to the Commerce Business User Profile.
Commerce Product page	Creates the Commerce Product Layout that organizes all your product information, including SKU,s classes, and categories.	Go to **Setup** > **Object Manager** > **Product** > **Page Layouts**, and create a Commerce Product Layout. In the Commerce Product Layout section: • Add fields for Product SKU, Product Class, and Stock Keeping Unit to the Product Detail section. • Add related lists for Related Product Categories, Commerce Entitlement Policies, and Related Product Selling Model Option. Return to Page Layouts and select **Page Layout Assignment** > **Edit Assignment**. Assign the layout to the Commerce Business User Profile.

Layout	Automated Setup	Manual Setup Instructions
Price Book Entry page	Customizes the Price Book Entry page to add Active Price Adjustment and Product Selling Model related lists.	Go to **Setup** > **Object Manager** > **Price Book Entry** > **Page Layouts** > **Price Book Entry**. Select Related Lists, and drag Active Price Adjustment and Product Selling Model to the Related Lists section. Save the layout as Commerce Price Book Entry.
Product page	Enables you to create and configure product sets by adding the Child Components related list to the Product Layout.	Go to **Setup** > **Object Manager** > **Product** > **Page Layouts** > **Product Layout**. Select Related Lists, and drag the Child Components related list to the Related Lists section.
Order page	Creates the Commerce Order Layout that gives you the tools to manage orders, including sales stores and order delivery groups.	Go to **Setup** > **Object Manager** > **Order** > **Page Layouts**, and create a Commerce Order Layout. In the Order Layout section: • Add a field for Sales Store ID. • Add a related list for Order Delivery Groups. Return to Page Layouts and select **Page Layout Assignment** > **Edit Assignment**. Assign the layout to the Commerce Business User Profile.
Order Summary Lightning Record page	Creates the Order Summary Lightning Record Page that shows order details in a single view and helps you access order-servicing flows in Actions & Recommendations.	Go to **Setup** > **Object Manager** > **Lightning Record Pages**, and create a Order Summary Lightning Record Page.

Configured Order-Related Flow Templates

Commerce Setup Assistant automatically configures order-related flows, which makes it easy for your customers to cancel or return items.

To create flow templates manually, go to **Setup** > **Process Automation** > **Flows**. Clone and activate the order-related flows, create records, and add flows to the Actions & Recommendations component.

SEE ALSO:

Customize an Order Management Flow
Add a Service Flow to an Object Record Page
Salesforce Order Management Flows

Payments Digital Experience Site

Commerce Setup Assistant automatically sets up an Experience Cloud site as a data channel between the payment gateway and Salesforce Payments.

Find this site, sfpwebhook, at **Setup** > **Digital Experiences** > **All Sites**. To create the payments digital experience site manually, see Set up a Channel for Payment Data.

Automate Person Accounts for Guest Access

Person accounts provide a more personalized shopping experience and enable guest shoppers to access your store without creating an account. When you automate person account setup, you don't need to manually configure System Administrator profile access to the Business Account Person Account record types. If you have a D2C store, you must set up person accounts. For a B2B store, you can enable person accounts only if you let guest shoppers use your store.

1. From Setup, in the Quick Find box, enter and select **Commerce Setup Assistant**.
2. On the Salesforce Commerce Setup tile, click **View Details**.
3. Go to the Additional Setup tab.
4. For Person Accounts for Guest Access, click **Get Started**, review and accept the considerations.

To manually set up person accounts, see Enable Person Accounts for Commerce.

SEE ALSO:

Considerations for Using Person Accounts

Commerce Order Routing

Enhance how you manage your inventory and orders by enabling order routing.

Before you enable order routing, enable Order Management System (OMS) and Omnichannel Inventory (OCI). To set up order routing, go to **Setup** > **Commerce Setup Assistant** > **Additional Setup**.

SEE ALSO:

Salesforce Order Management

Omnichannel Inventory

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Dashboards and Reports Installation

Get insights on your customer behavior, product performance, and revenue data by installing reports and dashboards in one click.

From **Setup** > **Commerce Setup Assistant** > **Additional Setup**, for Dashboards & Reports, click **Install**, and install these reports and dashboards:

- Business Overview
- Commerce Finance
- Commerce Payments
- Commerce Promotions

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Set Up the Commerce Analytics Dashboards

Reports and Dashboards

Commerce Setup Assistant Troubleshooting

Commerce Setup Assistant takes only a few minutes to prepare your org for Commerce. However, occasionally the setup can fail or only partially complete. Common reasons include missing org permissions and licenses or unassigned profiles or permission sets.

State	Reason	What to Do Next
Partially Complete	One or more features couldn't be set up completely or failed. An error icon indicates the feature that couldn't be set up or enabled.	On the Commerce Setup Assistant page, click **Retry Setup**. If Commerce Setup Assistant can't set up your org after several retries, set up the incomplete feature manually or contact Salesforce Customer Support.
Failed	One or more features failed to set up. The Basic tab or Additional tab indicates the error.	

SEE ALSO:

Using Commerce Setup Assistant to Set Up Features

Start Selling Online

The store is where shoppers and buyers go to view, select, and purchase your products. We provide B2B and D2C store templates to get you started. We also provide a template for a reorder portal you can embed into your sales or service cycles to make it easy for your customers to place reorders.

Create a Commerce Store or Reorder Portal

Use the commerce wizard to create a B2B or D2C store based on Lightning Web Runtime (LWR), or set up Pay Now or a reorder portal to embed into your sales or service cycles.

Commerce Store Setup Tasks

With the refreshed Commerce app, you can set up your store in a few clicks by completing the guided tasks on the store home page. These guided tasks are for stores that have managed checkout enabled, and the tasks vary based on the store type. As you set up your store, you can understand the purpose and requirements of the tasks from the guided information that's displayed before and after the tasks. After you complete the tasks, preview and activate your store.

Sharing Settings for a Commerce Reorder Portal

When a rep invites a contact to a reorder portal, the action creates order summary records for the context order and the past year of order records associated with the contact. Make sure that both the sales rep and reorder portal buyer have read access to these order summary records.

Configure an Einstein Next Best Action Component for a Commerce Reorder Portal

After you set up a Commerce Reorder Portal, configure an Einstein Next Best Action component on the Order record page. Based on a recommendation from this component, a rep can invite a buyer to the portal.

Create a B2B or D2C Store on an Existing Experience Cloud Site

You can add a B2B or D2C store to a site that you already have. Reuse the site's domain and settings, branding, and styling to present an integrated experience to your users. The site template, pages, components, and navigation stay the same. After you add the store, you can use commerce pages and components to design your commerce experience.

Migrate a Nonenhanced LWR Commerce Store to a New Salesforce Org

Starting in Winter '24, all new stores are built on enhanced LWR sites. If you have a store built on a nonenhanced LWR site, you can migrate that store to production or to another org.

Create a Commerce Store or Reorder Portal

Use the commerce wizard to create a B2B or D2C store based on Lightning Web Runtime (LWR), or set up Pay Now or a reorder portal to embed into your sales or service cycles.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

This task assumes that your org is already set up for Commerce. If it's not, from Setup, in the Quick Find Box, enter `Commerce`, and select **Commerce Setup Assistant**. Click **Get Started** on the **Salesforce Commerce Setup** tile and follow the prompts.

Follow the process described here to create a store, or set up pay now or a reorder portal. Don't go to Digital Experiences in Setup and click **New** to create a store.

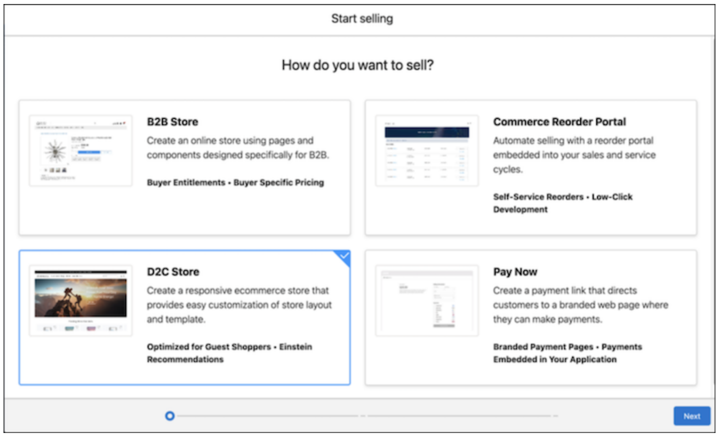
EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find Box, enter `Commerce`, select **Commerce Setup Assistant**, and under **Start Selling Online**, click **Get Started**.
3. Choose a template.



B2B Store
Create an online store using pages and components designed specifically for B2B.
Buyer Entitlements • Buyer Specific Pricing

Commerce Reorder Portal
Automate selling with a reorder portal embedded into your sales and service cycles.
Self-Service Reorders • Low-Click Development

D2C Store
Create a responsive ecommerce store that provides easy customization of store layout and template.
Optimized for Guest Shoppers • Einstein Recommendations

Pay Now
Create a payment link that directs customers to a branded web page where they can make payments.
Branded Payment Pages • Payments Embedded in Your Application

After you use a template to create a store, pay now, or reorder portal, you can't change its template.

LWR stores and reorder portals are built on enhanced LWR sites. See What is the Enhanced Sites and Content Platform.

The reorder portal template includes a preconfigured subset of Commerce LWR components to provide buyers a streamlined reorder experience. For example, on the Home page, the Order List component displays the customer's recent orders.

4. Click **Next**.
5. Select a default ship-to country.

   The list of available countries is configured in Setup at **Data** > **State and Country/Territory Picklists** > **Configure States, Countries, and Territories**.
6. Select a default language.

   The available languages are the languages enabled in Translation Workbench. See Enable Translation Workbench. When your store is created, the default language that you select is set as the default language in Experience Builder. If you change the default language later, you must manually change the default language in Experience Builder.
7. Select a default currency.

   The available currencies are the currencies enabled in your org. See Enable Currencies.
8. Enter a name for your selling channel.

   Don't include an apostrophe in the name. Users can see up to 32 characters of the name in the global header dropdown menu. If you're creating more than one selling channel, differentiate the beginning of each name by business unit, region, or other distinction.
9. Enter a string that's included in the URL for the store or reorder portal.

   The URL for your store is the string you enter here added to your Salesforce domain name for digital experiences. For example, if your domain is `*MyDomainName*.my.site.com`, and you enter `*jewelry*` in the URL field, your store URL is `*MyDomainName*.my.site.com/jewelry`.
10. If you're creating a reorder portal, to import all recent products into the reorder portal, select **Add all simple products sold in the last 365 days**.

    Only simple products are imported. For information about simple products, see Product Classes, Variations, and Attributes.
11. Click **Start Selling**.
    A store or reorder portal based on the template that you selected is created, including a site that you can access through Experience Builder. The selling channel is created with these default entities.

    - A store catalog with one product category
    - A store buyer group with an entitlement policy
    - A store price book and store strikethrough price book
    - An enhanced CMS workspace and a public channel that connects the store to that CMS workspace

    You can create and assign different records, but you can't delete the default entities, except for the product category. You can change the CMS public channel for the store.

    If the creation process encounters an error, the selling channel is created without a catalog, buyer group, and price books. In this case, you must create these entities.

    Self-registration and guest access are enabled in the new channel.

    When your store is created, you land on the store home page. The tasks you must complete to finish setting up the store are listed on the screen. The tasks are different depending on which kind of selling channel you created.
12. From the store home page, click each setup task and follow the steps to complete.

    You can preview the store at any time by clicking **Preview**.

13. When you've completed the required set-up steps, click **Activate** to make your store available online.

    Before you activate a production store for customers, we strongly recommend that you configure a custom domain and CDN, to optimize security, scalability, and performance. See Configure a Custom Domain and CDN. When you activate a draft store, you can skip configuring the custom domain and CDN.

14. If you're creating a reorder portal, configure these settings.
    a. Give read access to order summary records for sales reps and reorder portal buyers. See Sharing Settings for a Commerce Reorder Portal.
    b. To add customers to the reorder portal, configure the Invite Contact to Reorder Portal cadence in Sales Engagement. See Use Cadences for a Commerce Reorder Portal.

       You can also send invitations by configuring an Einstein Next Best Action component. See Configure an Einstein Next Best Action Component for a Commerce Reorder Portal.

To get your store ready for production and optimize your online business, follow the recommended actions on the screen.

SEE ALSO:

Website Design for Commerce Stores
B2B Commerce Aura to LWR Migration Guide
Create a Catalog and Assign It to a Store
Manage Buyer Access to B2B Stores
Create a Buyer Group or Store Price Book
Create a CMS Workspace to Import Images to a Commerce Store
Use a Custom URL for Your Store
Salesforce Pay Now
Create a B2B or D2C Store on an Existing Experience Cloud Site
Default Entities for Import to Stores
LWR and Aura Store Templates

Commerce Store Setup Tasks

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

With the refreshed Commerce app, you can set up your store in a few clicks by completing the guided tasks on the store home page. These guided tasks are for stores that have managed checkout enabled, and the tasks vary based on the store type. As you set up your store, you can understand the purpose and requirements of the tasks from the guided information that's displayed before and after the tasks. After you complete the tasks, preview and activate your store.

This table lists the required tasks for each store type and when a task is considered complete.

Table 5: Required tasks based on your selling channel

Store Type	Required Tasks	How to Complete the Task
D2C	Add branding to your site	Add a brand to your site, and click **Finish Brand Set Up**.
	Add a product	Add at least one product to the catalog.

Store Type	Required Tasks	How to Complete the Task
	Enable guest access and self-registration	If you've already enabled person accounts, guest access and self-registration are automatically enabled and the task is marked complete. If person accounts isn't enabled, click this task to enable person accounts, guest access, and self-registration, which usually takes up to 1 hour to complete. This task makes person accounts the default record type for the guest user profile.
	Set up checkout	• If you have an existing merchant account, associate it with the store and connect it to your Stripe account. • Set up at least one tax provider and associate it with your merchant account. • Accept the default Salesforce Native Shipping option, or configure at least one shipping provider.
B2B	Add branding to your site	Add a brand to your site, and click **Finish Brand Set Up**.
	Add products	Assign, create, or import at least one product to your catalog.
	Set up taxes	Set up either the manual tax solution provider or install a third-party tax solution provider.
	Set up payments	• Set up payments using Salesforce Payments or another provider, and associate it with your merchant account. • Set up at least one tax provider, and associate it with your tax provider. • Accept the default Salesforce Native Shipping option, or configure at least one shipping provider.
	Personalize buyer pricing	Click the link that redirects to the Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores help page.
	Set up buyers, buyer groups, and entitlements	On the Customer Workspace, configure buyers, buyer groups, and entitlements.
	Manage store access	Click the link that redirects to the Access help page.

Store Type	Required Tasks	How to Complete the Task
Reorder Portal	Add branding to your site	Add a brand to your site, and click **Finish Brand Set Up**.
	Add products	Add at least one product to your reorder portal catalog.
	Set up payments	• Set up payments by using Salesforce Payments or another provider, and associate it with your merchant account. • Set up at least one tax provider, and associate it with your tax provider. • Accept the default Salesforce Native Shipping option, or configure at least one shipping provider.
	Set up email invitations	Click the link that redirects to the Configure an Einstein Next Best Action Component for a Commerce Reorder Portal help page.

Sharing Settings for a Commerce Reorder Portal

When a rep invites a contact to a reorder portal, the action creates order summary records for the context order and the past year of order records associated with the contact. Make sure that both the sales rep and reorder portal buyer have read access to these order summary records.

By default, the Commerce Reorder Portal Inviter license provides read access to order summaries. However, certain licensing and CRUD permission configurations require additional setup.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Sales Cloud

Available in: B2B Commerce

Reorder Portal Buyer

The default sharing settings for a reorder portal buyer depend on the buyer’s license type and the external sharing settings for order summaries.

- If the buyer has a Customer Community Plus license, they receive read access to order summary records, and no action is needed.
- If the buyer doesn’t have a Customer Community Plus license and external sharing settings for order summaries are private, create a sharing set using the B2B Reordering Portal Buyer Profile and OrderSummary entity. See Create a Sharing Set. When defining sharing criteria, provide Read Only access if User.Contact equals OrderSummary.OriginalOrder.CustomerAuthorizedBy.
- If the buyer doesn’t have a Customer Community Plus license, external sharing settings for order summaries are Controlled by Parent, and external sharing settings for orders are private, create a sharing set. Use the B2B Reordering Portal Buyer Profile and Order entity. When defining sharing criteria, provide Read Only access if User.Contact equals Order.CustomerAuthorizedBy, Order.Contract.CustomerSigned, or Order.Quote.Contact.

Important: Make sure that any field you map to User.Contact in the sharing set gets populated in your org’s order records.

Sales Rep

The default sharing settings for a sales rep depend on the rep’s access to orders and the internal sharing settings for order summaries.

- If the rep owns the context order, they receive read access to the order summary records, and no action is needed.
- If the rep doesn't own the context order and internal sharing settings for order summaries are private, grant them read access to order summaries. Use Sharing Settings, Sharing Rules, or Manual Shares.
- If the rep doesn't own the context order, internal sharing settings for order summaries are Controlled by Parent, and internal sharing settings for orders are private, grant them read access to orders. Use Sharing Settings, Sharing Rules, or Manual Shares.

SEE ALSO:

B2B Commerce Licenses and Allocations

Configure an Einstein Next Best Action Component for a Commerce Reorder Portal

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

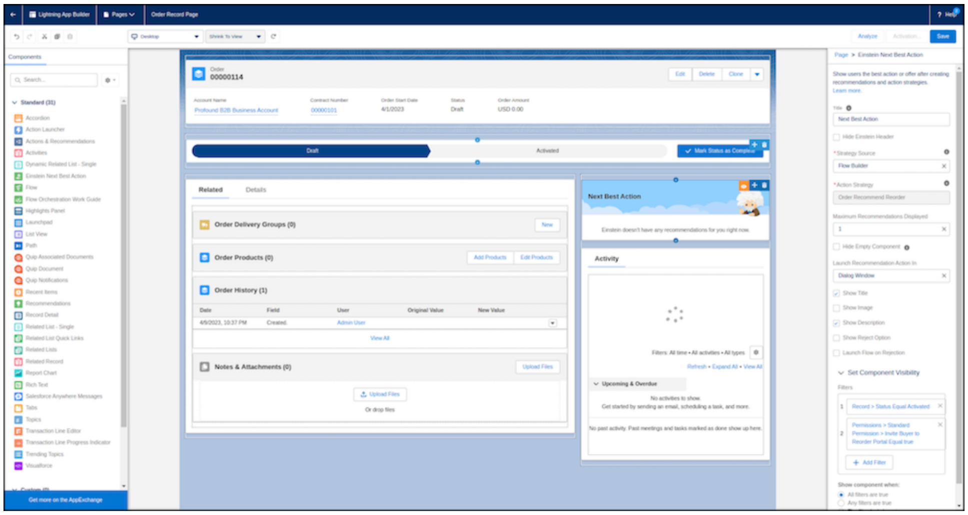
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Sales Cloud

Available in: B2B Commerce

After you set up a Commerce Reorder Portal, configure an Einstein Next Best Action component on the Order record page. Based on a recommendation from this component, a rep can invite a buyer to the portal.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. Add the Einstein Next Best Action component to the Order record page.
    a. In the App Launcher, find and select **Orders**.
    b. Open an Order record.
    c. Click the Setup icon ⚙ at the top of the page, and then select **Edit Page**.
    d. From the Components menu, drag the Einstein Next Best Action component onto the Order Record Page layout in the Activity sidebar.
    e. Use the Order Recommend Reorder flow as Action Strategy input for the component.
    f. Click **Save**.



Page > Einstein Next Best Action

Show users the best action or offer after creating recommendations and action strategies. Learn more.

Title: Next Best Action

☐ Hide Einstein Header

*Strategy Source: Flow Builder

*Action Strategy: Order Recommend Reorder

Maximum Recommendations Displayed: 1

☐ Hide Empty Component

Launch Recommendation Action In: Dialog Window

☑ Show Title

☐ Show Image

☑ Show Description

☐ Show Reject Option

☐ Launch Flow on Rejection

Set Component Visibility

Filters

1 Record > Status Equal Activated

2 Permissions > Standard Permission > Invite Buyer to Reorder Portal Equal true

Add Filter

Show component when:

● All filters are true

○ Any filters are true

2. Enable any missing Field Level Security settings for Order.QuoteId, Order.ContractId, Order.CustomerAuthorizedBy, Quote.ContactId, and Contract.CustomerSignedId. See Field Level Security.
3. Set External and Internal Organization-Wide Sharing Defaults to private for the Order Summary object.
4. Invite a buyer to a Commerce Reorder Portal using the Einstein Next Best Action component.
    a. Open an Order record.
    b. From the Einstein Next Best Action component, click **Invite to Reorder Portal**.
    c. Follow the screen flow steps.

SEE ALSO:

Create a Commerce Store or Reorder Portal

Create a B2B or D2C Store on an Existing Experience Cloud Site

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can add a B2B or D2C store to a site that you already have. Reuse the site's domain and settings, branding, and styling to present an integrated experience to your users. The site template, pages, components, and navigation stay the same. After you add the store, you can use commerce pages and components to design your commerce experience.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

You can add B2B or D2C stores based on the templates in this table to an existing site. Custom templates aren't supported.

B2B	D2C
B2B (Aura)	D2C (LWR)
B2B (LWR)	Pay Now (LWR)
B2B Reorder Portal (LWR)	
CPT (Aura)	
Starter (Aura)	
Pay Now (LWR)	

1. In the App Launcher, find and select **Stores**.
2. Click **Create a Store on Existing Site**.
3. Choose to create a B2B or D2C store.

    Your options depend on which licenses you have.
4. Enter a name for your store, and click **Next**.

    When naming your store:
    - Don't include an apostrophe character in the store name.

- If you're creating more than one store, differentiate the beginning of each store name by business unit, region, and so on.
- Keep it short. Names are truncated in the global header dropdown menu. Users can see up to 32 characters.

5. Select the site where you want to create the store.

   If a site already has a store, it's not included in the list.

6. Click **Create Store**.

   When you add a store to an existing site, the store defaults for buyer group, catalog, category, price book, and entitlement policy aren't created for you.

7. From the new store's home page, click the **Experience Builder** tile.
8. (Optional) Add the standard commerce pages that you want to use in your storefront.
   a. From the Pages dropdown menu, select **New Page** > **Standard Page**.
   b. To add, for example **Checkout**, click the page, and then click **Next**.
   c. Enter a name and API name for the page.
   d. Click **Create**.
   e. Repeat these steps for other standard pages that you want to use, for example, Commerce Storefront, My Lists, Order Confirmation, and Quick Order.
9. (Optional) Add the Cart object page.
   a. From the Pages dropdown menu, select **New Page** > **Object Pages**.
   b. Click **Cart**, and then click **Create**.
   c. In the message about the new object pages, click **Create**.
   d. From the Pages dropdown, select **Cart Detail**.
   e. Optionally, delete the generic components on the page and add the Cart, Cart Totals, and Checkout button components.
10. (Optional) Add the Category object page.
    a. From the Pages dropdown menu, select **New Page** > **Object Pages**.
    b. Click **Category**, and then click **Create**.
    c. In the message about the new object pages, click **Create**.
    d. From the Pages dropdown, select **Category Detail**.
    e. Optionally, delete the generic components from the page and add the Results Layout component.
11. (Optional) Add the Product object page.
    a. From the Pages dropdown menu, select **New Page** > **Object Pages**.
    b. Click **Product**, and then click **Create**.
    c. In the message about the new object pages, click **Create**.
    d. From the Pages dropdown, select **Product Detail**.
    e. Optionally, delete the generic components from the page and add the Product Detail Card and Product Attachment components.
12. (Optional) Set up the store to use categories as the default navigation.
    a. Click the gear icon and select **Settings** > **Navigation**.
    b. From the Default Navigation dropdown, select **Edit**.

   c. Click **Add Menu Item**.
   d. From the Type dropdown, select **Data Source**.
   e. From the Data Source dropdown, select **Storefront Categories**.
   f. Select **Publicly available**.

13. For D2C stores, to associate the site with the store, republish the site.

SEE ALSO:

Create a Commerce Store or Reorder Portal

Migrate a Nonenhanced LWR Commerce Store to a New Salesforce Org

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Starting in Winter '24, all new stores are built on enhanced LWR sites. If you have a store built on a nonenhanced LWR site, you can migrate that store to production or to another org.

1. Deploy a nonenhanced site using MetaData API.

   See Deploy Your Experience Cloud Site with the Metadata API.

2. Create a store on the new site.

   See Create a B2B or D2C Store on an Existing Experience Cloud Site.

3. To delete the webstore-to-CMS connection for the new store, contact Salesforce Customer Support.

   Deleting this connection allows you to import media from a non-enhanced CMS workspace.

4. Create a nonenhanced CMS workspace using the Digital Experiences app.

   See Create a CMS Workspace. When you create the workspace, select **CMS Workspace**, not **Enhanced CMS Workspace**.

5. Rebuild your store.

   When you import to the new store, select the nonenhanced CMS workspace that you created.

Import and Export Commerce Data

Import data, including products, product variations, and images, by uploading a CSV file. Data import occurs asynchronously, so after you start an import, you can perform other tasks. We recommend using the CSV file import process, but for large imports, use Data Loader. You can also export data for up to 300,000 products to a CSV file.

You can import up to 10,000 products with nine images each in an import session. Import times increase in relation to the number or images included.

Tip: For faster performance when importing to a Commerce site that uses nonenhanced CMS workspaces, we recommend importing images in a separate CSV file. First import a file that contains only product information and related entities. Then import a separate file that includes only the product IDs and images.

You can run one only Commerce import job, including category or product imports, at a time. If a Commerce import job is running, wait for it to complete or cancel it before starting a new import.

Using CPQ (Configure, Price, Quote) triggers isn't compatible with a CSV import.

Image Import for Commerce Stores

Product images and attachments that customers see when visiting your store are typically linked to a Salesforce CMS workspace. Usually the images are stored on a host external to Salesforce. You can configure the external host as a trusted site for your org. If you don't have a CMS workspace, create one before beginning the import.

Default Entities for Import to Stores

When you create a store, several records for the store are created by default. If the store creation process encounters an error when trying to create the defaults, the store is created without the defaults. You can create and assign different records to the store, but the only default record you can delete is the category.

Import Data Globally Using a CSV File

You can do a bulk import to globally update or add products and related entities for up to 10,000 products using a CSV file. After you import the products, you can use them in any D2C or B2B store.

Import Using Data Loader

We recommend that you use the CSV data import file to import data into the Commerce app. The commerce import file maintains the correct relationships between commerce objects and supports importing up to 10,000 products with nine images each, along with the required updates to records in related objects. Typically, more than 50,000 updates are required to related objects for 10,000 imported commerce products. However, if you want to bulk import more than 10,000 products with nine images each, you can use the Salesforce Data Loader tool.

Export Commerce Data

Export up to 300,000 products to a CSV file. Only product columns, including product variations, are included in the export. Large exports can result in more than one CSV file. Filters and sorting applied to the product workspace are reflected in the export file. All product fields, both standard and custom, that appear in the workspace are included in the export file.

Image Import for Commerce Stores

Product images and attachments that customers see when visiting your store are typically linked to a Salesforce CMS workspace. Usually the images are stored on a host external to Salesforce. You can configure the external host as a trusted site for your org. If you don't have a CMS workspace, create one before beginning the import.

When you create a store, the creation process creates a CMS workspace for the store and a public channel to the workspace. To use content in the store from another workspace, add the store's public channel to that workspace. See Add a Channel to a CMS Workspace. The content from all workspaces assigned to the store's public channel is available to the store.

Stores based on the LWR platform created in orgs provisioned with Commerce in Summer '23 or later have a public channel to an enhanced CMS workspace. To allow those stores to also access media stored in a non-enhanced workspace, add the store's public channel to the non-enhanced workspace.

Add Your External Image Host as a Trusted Site

So that your stores can access your product images, add the external host where those images are stored as a Trusted URL.

Create a CMS Workspace to Import Images to a Commerce Store

When you use a CSV file to import images, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the import process.

Add Your External Image Host as a Trusted Site

So that your stores can access your product images, add the external host where those images are stored as a Trusted URL.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Trusted URLs`.
3. Click **New Trusted URL**.
    a. For URL, enter the host's URL.
    b. For Context, select **All**.
    c. In the CSP Directives section, select **img-src (images)**.
4. If more than one server hosts your product images, add each server as a Trusted URL.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Image Import for Commerce Stores

Create a CMS Workspace to Import Images to a Commerce Store

Create a CMS Workspace to Import Images to a Commerce Store

When you use a CSV file to import images, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the import process.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Note: The default language for the CMS workspace is set to the default language of the org. If Translation Workbench is enabled and there are supported languages configured for Translation Workbench, the default language of the CMS is set to the first supported language. You can add other languages to the CMS workspace, but you can't change the default language after the workspace is created.

1. From the App Launcher, select **CMS Workspaces**.
2. Click **Add Workspace**.
3. Enter a name and description for your workspace, and click **Next**.
4. (Optional) Add a channel to a store by selecting it from the list, and click **Next**.

    To use images from the CMS in a store, there must be a channel from the CMS workspace to the store. You can go back later and add channels to stores.

5. Select contributors from the list, and click **Next**.

    We recommend adding the Commerce Admin and Merchandiser users as contributors.

6. Select a role for each user type, and click **Next**.
7. Select a language for your translated content and move it from the Available list to the Selected list.
8. Select a default language, and click **Next**.

9. Click **Done**.

SEE ALSO:

Add Your External Image Host as a Trusted Site

Image Import for Commerce Stores

Default Entities for Import to Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When you create a store, several records for the store are created by default. If the store creation process encounters an error when trying to create the defaults, the store is created without the defaults. You can create and assign different records to the store, but the only default record you can delete is the category.

- Catalog—Each store has a default catalog named after the store. For example, if your store is named MyStore, your default catalog is MyStore Catalog. The default catalog includes one default category, Products. When you import data, you can select which catalog and category to assign to a product.
- Buyer group—Each store has a default buyer group, which is a collection of accounts that have common access to specific entitlements. You can't use import to assign products to a buyer group.
- Entitlement policy—Each store has a default entitlement policy, which defines the products and product-related information that shoppers can see based on their buyer group membership. B2B and D2C stores can have multiple entitlement policies in addition to the default. When you import data, you can assign products to entitlement policies.
- Store price book—Each store has a default price book and a default strikethrough price book named after the store. For example, if your store is named MyStore, your default price book is MyStore Price Book. The default strikethrough price book is MyStore Strikethrough Price Book. When you import data, you can select the price books to assign to the products.

  Note: Each Salesforce org has a global standard price book that contains all your products. The standard price book isn't associated with a specific store. It applies across all your stores. A product must be listed in your standard price book before it can be listed in any other price book. When you import data, specify two prices for each product—one for your store's price book, and one for your store's strikethrough price book. The import process updates the associated price books and uses the first price specified in the row to update the standard price book. For example, if the first column in the row specifies a price for the store's strikethrough price book, that price is used to update the standard price book.

- CMS workspace—When you create a store, the creation process creates a CMS workspace for the store and a public channel to the workspace. You must use this workspace when importing to the store. You can't specify that the import process use a different workspace. To use content in the store from another workspace, assign the store's public channel to that workspace. The content from all workspaces assigned to the store's public channel is available to the store. The default language for the CMS workspace is set to the default language of the org. If Translation Workbench is enabled and there are supported languages configured for Translation Workbench, the default language of the CMS is set to the first supported language. You can add other languages to the CMS workspace, but you can't change the default language after the workspace is created.

  Note: Before you activate your store, we recommend that you use the Digital Experiences app to change the domain for the public channel associated with the store's CMS workspace. Make the domain match the domain that you configure for your store. For instructions on configuring a custom domain for your store, see Configure a Custom Domain and CDN. For instructions on using the Digital Experiences app to configure the domain for a CMS public channel, see Configure Salesforce CDN for Digital Experiences in Salesforce CMS.

SEE ALSO:

Import and Export Commerce Data

Import Data Globally Using a CSV File

You can do a bulk import to globally update or add products and related entities for up to 10,000 products using a CSV file. After you import the products, you can use them in any D2C or B2B store.

CSV File Format for Importing Commerce Data

When you construct a product import file, specify column headings that correspond to Product, Category, and Price Book information. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

Import Data Globally

Upload and import the CSV file that contains the products that you want to add or update for use by all stores.

CSV File Format for Importing Commerce Data

When you construct a product import file, specify column headings that correspond to Product, Category, and Price Book information. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

Important: To properly encode special characters, save the CSV file in UTF-8 format.

Column Heading	Column Value
Product Name	The name of the product, corresponding to the Product2.Name field. This column is required if you're creating products. If you're updating products, you don't have to include it as long as you uniquely identify the product with SKU, ProductCode, Product Id, or Product ExternalId.
Product Description	(Optional) A description of the product, corresponding to the Product2.Description field.
Product *`<FieldName>`*	The name of a field on the Product2 object. *`FieldName`* is the api name of the field. You can use any updateable field on the Product2 object, including a custom field, as a column heading. You can specify as many fields as you want. The import process supports fields with data type checkbox, currency, date, date/time, email, number, percent, phone, picklist, picklist (multiselect), text, text area, text area (long), text

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Column Heading	Column Value
	area (rich), time, url, or string. The data format in this column depends on the field data type. • Checkbox—Allowed values are true or false. • Date, date/time—Values are locale-specific. See Supported Date and Time Formats (ICU). • Picklist—Use the picklist value. • Picklist (Multiselect)—Use the picklist values separated by a semi-colon (;). For formatting guidelines for the other supported data types, see Custom Field Types.
Product Type	The type of the product. You can set the product type if the import creates this product. You can't update the product type for an existing product. If you try to update the product type for an existing product, you don't get an error message, but the type isn't updated.
SKU	The product's stock-keeping unit (SKU) number. SKU is one of the four columns that uniquely identify a product. ProductCode, Product Id, and Product ExternalId are the others. At least one of the four is required in your import file. The SKU column name is equivalent to the Product StockKeepingUnit column name. There's no difference between them functionally, but SKU has fewer characters to enter. This column corresponds to the Product2.StockKeepingUnit field. You can't update the product SKU using the import file.p The SKU field is required for several commerce features, such as cart and checkout, and for importing product image references into Salesforce CMS. If you're creating products, make sure that your import file specifies the SKU. If you're updating products, the SKU is optional as long as you uniquely identify the product.
Slug `<language code>`	(Optional) The SEO-friendly URL slug for the product in a specified language. Use a separate column for each language you want to specify a slug for. • For `language code`, specify a Salesforce-supported language code. For example, `Slug en_US`. For a slug to be used in a store, the language must be available in the org and in that store. • Use of the term `Product2` isn't allowed in a URL slug. This URL is reserved for use in your site. URL slugs have a character limit of 150 and allow these characters: `a-z A-Z 0-9 . - _ $ & : ; * , = @`. Foreign language characters are also allowed.

Column Heading	Column Value
Media Listing URL	(Optional) URL to the media to use as the listing image for the product. If you're updating information about the listing media, include the URL, even if you don't want to change it, because the URL uniquely identifies the media. If you're updating existing listing media, the fields that you omit default to the values for the existing listing media. If you're using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates an image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace. Important: When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content doesn't have restricted access.
Media Listing Title	(Optional) The title for the listing media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Listing AltText	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Listing Thumbnail	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard URL 1...Media Standard URL 8	(Optional) You can have up to eight columns that contain the URLs to media associated with the product, labeled Media Standard 1, Media Standard 2, and so on. If you're updating information about the standard media, include the URL, even if you don't want to change it, because the URL uniquely identifies the standard media. If you're updating existing media, the fields that you omit default to the values for the existing media. If you're using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates a new image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace. When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content doesn't have restricted access.
Media Standard Title 1...Media Standard Title 8	(Optional) The title for the media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.

Column Heading	Column Value
Media Standard AltText 1...Media Standard AltText 8	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Standard Thumbnail 1...Media Standard Thumbnail 8	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard sortOrder 1...Media Standard sortOrder 8	(Optional) This value determines the order in which media is displayed on the product detail page. Valid values are 1 through 8. If you don't include this column, sort order 1 is assigned to the media. Import fails if the same sort order value is assigned to more than one standard media for a product.
Media Attachment URL 1...Media Attachment URL 5	(Optional) You can have up to five columns that contain the URLs to attachments associated with the product, labeled Media Attachment 1, Media Attachment 2, and so on.
Media Attachment Title 1...Media Attachment Title 5	(Optional) The title for the attachment. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the attachment. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Attachment AltText 1...Media Attachment AltText5	(Optional) Alt text for the attachment. If you don't include this column, no alt text is assigned to the attachment.
Media Attachment Thumbnail 1...Media Attachment Thumbnail 5	(Optional) URL for the thumbnail for the attachment. If you don't include this column, no thumbnail is assigned to the attachment. Thumbnails aren't supported for enhanced CMS workspaces.
ProductCode	The product's unique Product Code. ProductCode is one of four columns that uniquely identify a product. SKU, Product Id, and Product ExternalId are the others. At least one of the four is required in your import file. This column corresponds to the Product2.ProductCode field. If you identify an existing product using a SKU column, you can update the Product Code to a new value that you specify in this column. The ProductCode field doesn't enforce a unique constraint. If you use this column to identify products, it's possible that duplicate records will be created or if there are already records with duplicate values, any one of the records will be updated.
Product ExternalId	The product's External ID. Product ExternalId is one of four columns that uniquely identify a product. SKU, Product Id, and ProductCode are the others. At least one of the four is required in your import file. This column corresponds to the Product2.ExternalId field. If you identify an existing product using either a SKU or a ProductCode column, you can update the External ID to a new value that you specify in this column.

Column Heading	Column Value
	The Product ExternalId field doesn't enforce a unique constraint. If you use this column to identify products, it's possible that duplicate records will be created or if there are already records with duplicate values, any one of the records will be updated.
Product Id	The Product ID. Product Id is one of four columns that uniquely identify a product. SKU, Product ExternalId, and ProductCode are the others. At least one of the four is required for your import file. This column corresponds to Product2.Id. The Product ID is assigned automatically when the product is created. You can't set it to a specific value, and you can't change it after the product is created.
Product Family	(Optional) A grouping for products, corresponding to the Product2.Family field. Group products any way you like. You can use product family values as filters for search results.
Product isActive	(Optional) A value indicating if the product is active, corresponding to the Product2.IsActive field. By default, newly created products are inactive. To make a product active, specify `true` in this column. To make a product inactive, specify `false`, leave the column blank, or omit the column.
Category 1... Category 5	(Optional) You can have up to five category columns, labeled Category 1, Category 2, and so on. You can't update existing categories for a product. You can only add new categories. For the first category, you can use the label Category without the number 1. In a category column, you can specify a nested category, using the / character to separate the levels. For example, Products/Machines/Espresso.
Entitlement 1... Entitlement 50	(Optional) The name of an entitlement policy to associate with the product. You can specify up to 50 entitlement policies in columns labeled Entitlement 1, Entitlement 2, and so on. You can't update existing entitlement policies for a product. You can only add new entitlement policies. Create the entitlement policies before you import the CSV file. For more information, see Create an Entitlement Policy on page 107. For the first entitlement policy, you can use the label Entitlement without the number 1.
Price *<values>*	To specify prices, use a column labeled Price, followed by optional values. The import process determines where to add the prices based on the values, if any, that you include in the column label. • Price or Price *<currency code>*—When you use Price as the column label, or Price followed by a currency code, you're asked which price book to use during the import process. The prices in all columns without an alias are added to the same price book. If a currency code isn't specified, the

Column Heading	Column Value
	default is the currency code for the user who's running the import. - Price (*alias*) or Price (*alias*) *currency code*—You can use any alias you want to describe a price book. For each alias, you're asked which price book to use during the import process. The prices in all columns using the same alias are added to the same price book. If a currency code isn't specified, the default is the currency code for the user who's running the import. - Price *price book ID* or Price *price book ID currency code*—The system adds the prices to the price book with the specified ID. If a currency code isn't specified, the default is the currency code for the user who's running the import.
Variation AttributeSet	The attribute set for the variations of the product. Use the Variation AttributeSet API name for the column heading. This column is required if you specify product variations. Create the attribute set before importing the CSV file. For more information, see Create Attributes for Product Variations on page 100.
Variation Parent *<identifier>*	The parent product for the variation. In the column heading, include an identifier to indicate the value that you're using to identify the parent. Valid column headings are: - Variation Parent (Id)—Use Product ID. - Variation Parent (StockKeepingUnit)—Use SKU. - Variation Parent (ProductCode)—Use Product Code. - Variation Parent (ExternalId)—Use External ID to identify variation parent. The parent product must exist or be specified in the CSV file before the variations are created.
Variation Attribute Name 1... Variation Attribute Name 5	The API name of a variation attribute in the variation attribute set. A variation attribute is a custom field on the Product Attribute object, so __c is appended to the name, for example, Bag_Size__c. At least one Variation Attribute Name column is required for each attribute set, labeled Variation Attribute Name 1. You can have up to five attribute name columns, labeled Variation Attribute Name 2, Variation Attribute Name 3, and so on. You must create the variation attributes for importing the CSV file. For more information, see Create Attributes and Attribute Sets for Product Variations.

Column Heading	Column Value
Variation Attribute Value 1...Variation Attribute Value 5	The value of the attribute specified in the attribute name column. This column is required for each Variation Attribute Name column.

SEE ALSO:

Import Data Globally

Import Data Globally

Upload and import the CSV file that contains the products that you want to add or update for use by all stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To import prices requires a price book. To import images requires a CMS workspace. To import products and images, we recommend that you use two imports. First import the product, and then import the images. With this approach, you can work with the product data while the image import completes.

If you use the import file to create product variations, create the variation attributes and variation attribute sets before doing the import. If you use the import file to specify an entitlement policy, create the entitlement policy before doing the import.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Click **Import**.
4. Click **Upload Files**.

   You can optionally download a simple or advanced CSV template file to use as a starting point for your own file.

5. Navigate to your CSV import file and open it.
6. Click **Import**.
7. Select the catalog, price books, and CMS workspace for the import.
8. Click **Start Import**.

   Because the import is asynchronous, you can perform other tasks while the import processes. When the import finishes, the Commerce app posts an import completed notification. The Import Summary report shows the import results, including any errors caused by rows or column headings. If you have errors, fix the file, and import it again.

9. (Optional) Cancel the import.
   a. In the Import Summary, click **Cancel**.

b. Confirm the cancellation, and click **Cancel Import**.

SEE ALSO:

Import Data Globally Using a CSV File

CSV File Format for Importing Commerce Data

Import Using Data Loader

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

We recommend that you use the CSV data import file to import data into the Commerce app. The commerce import file maintains the correct relationships between commerce objects and supports importing up to 10,000 products with nine images each, along with the required updates to records in related objects. Typically, more than 50,000 updates are required to related objects for 10,000 imported commerce products. However, if you want to bulk import more than 10,000 products with nine images each, you can use the Salesforce Data Loader tool.

If you use Data Loader, you must explicitly maintain the correct relationship between objects. You can use Schema Builder to discover how objects are related. For information about how to use Schema Builder, see Work with Schema Builder.

For information about using Data Loader, see Data Loader.

SEE ALSO:

Import Data Globally Using a CSV File

Export Commerce Data

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Export up to 300,000 products to a CSV file. Only product columns, including product variations, are included in the export. Large exports can result in more than one CSV file. Filters and sorting applied to the product workspace are reflected in the export file. All product fields, both standard and custom, that appear in the workspace are included in the export file.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Exporting translations isn't supported. Products are exported in the language in which they were created.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Click **Export** from the dropdown menu.
4. Click **Start Export**.

   You're notified when the export is complete.

5. To see the export results, go to **Commerce Setup** > **Tools** > **Export**.

The export and import CSV files use the same header format. To make bulk updates, you can edit the export CSV file and then use it as the import CSV file. See Import Data Globally Using a CSV File.

Access to Commerce Stores

Specify which profiles and permission sets can access a B2B or D2C store. You can also set up self-registration so that shoppers can create an account and log in or allow guest browsing.

Add Profiles and Permissions for B2B and D2C Store Community Members

Specify which profiles and permission sets are members of the store community. Only users with profiles or permission sets that are part of a store's community can access the store.

Configure Self-Registration for Commerce Stores

When you enable self-registration, shoppers can create their own account and then log in to your store using that account instead of as a guest.

Manage Buyer Access to B2B Stores

Create buyers using either a business account or a person account. Add the business or person account to a buyer group. Associate the buyer group with a store. The products and prices buyers can access in the store are determined by the entitlement policies assigned to the buyer group.

Manage Guest Access

A guest is someone who isn't logged in to your store as an authenticated customer. Depending on the level of access that you provide, you can let guests browse your store, add products to their cart, and place orders.

Add Profiles and Permissions for B2B and D2C Store Community Members

Specify which profiles and permission sets are members of the store community. Only users with profiles or permission sets that are part of a store's community can access the store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

The person who created the store, or a person with the same profile as the person who created the store, must perform this task.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Feature Settings`, select **Digital Experiences** and then select **All Sites**.
3. Next to your store name, select **Workspaces**.
4. On the My Workspaces page, click the **Administration** tile.
5. In the left pane, click **Members**.
6. From the Search dropdown, select **All**.
7. In the Available Profiles list, drag the profiles for your internal users, such as System Administrator and Commerce Business User, along with any other applicable profiles, such as your Shopper profile, to the **Selected Profiles** list.

   The user who created the store is already listed under Selected Profiles. For example, if you created the store as the Commerce Business User, the Commerce Business User profile is listed under Selected Profiles.

8. In the Permission Sets list, drag the permission sets that you want to have access to the store, such as buyers, buyer managers, or account switchers, to the **Selected Permission Sets** list.

9. Click **Save**.

SEE ALSO:

Add Members to Your Experience Cloud Site

Configure Self-Registration for Commerce Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When you enable self-registration, shoppers can create their own account and then log in to your store using that account instead of as a guest.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

If you configure your Salesforce org by using the Commerce Setup Assistant and enable Person Accounts, self-registration is automatically enabled when you create a store. No need to manually enable self-registration if it's already enabled.

These steps describe how to enable self-registration if you want to do so manually.

1. Before configuring self-registration, add the Self-Registration component and publish the initial draft of your store.

   Publishing your store doesn't make it available to shoppers. The store isn't available to shoppers until you activate it.

   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **Website Design**, and then click **Experience Builder**.
   c. On your store's Register page, add the Self-Registration component.
   d. In the upper-right corner of the Experience Builder page, click **Publish**.
      You receive an email when the store is published.

2. Set up a site membership.

   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, enter `Digital Experiences`, and select **All Sites**.
   c. Next to your site, click **Workspaces**.
   d. Select **Administration** > **Members**.
   e. From the search list, select **All**.
   f. From the list of available profiles, select the customer profiles that you want to add, and click **Add**.
   g. Click **Save**.

3. Configure and enable self-registration.

   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Click **Store Settings**, and select **Buyer Access**.
   c. Go to **Self Registration** > **Profile** and select which customer profiles can self-register.
   d. (Optional) To set permissions, select a permission set group.
   e. Select an account record type.

If you haven't enabled person accounts, you can select only the business account record type or any child record type of a business account. See Use a Person Account to Create a Buyer for B2B Stores.

f. (Optional) Select the default buyer groups.

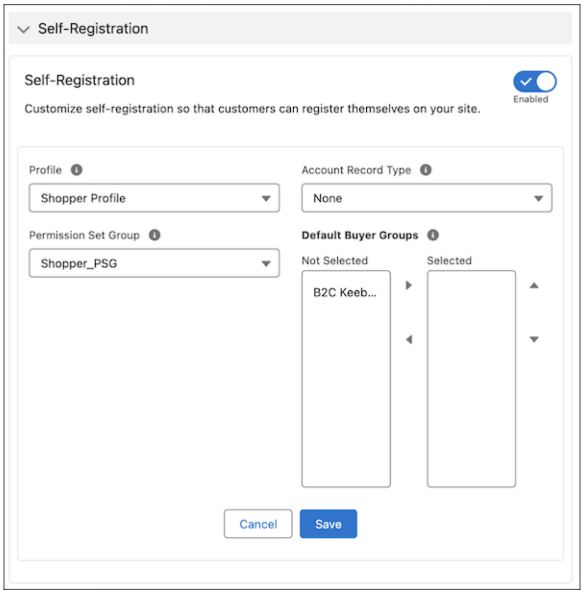
If no default buyer group is specified, self-registering buyers will be assigned to the store's default buyer group.

You can assign self-registering guests to up to 20 account-based buyer groups.

g. Turn on self-registration.

h. Click **Save**.

Example:



Self-Registration

Self-Registration

Customize self-registration so that customers can register themselves on your site.

Enabled

Profile: Shopper Profile

Account Record Type: None

Permission Set Group: Shopper_PSG

Default Buyer Groups

Not Selected: B2C Keeb...

Selected:

SEE ALSO:

Manage Guest Access

Publish Your Store

Manage Buyer Access to B2B Stores

Create buyers using either a business account or a person account. Add the business or person account to a buyer group. Associate the buyer group with a store. The products and prices buyers can access in the store are determined by the entitlement policies assigned to the buyer group.

Use a Business Account to Create Buyers

Enable the business account as a buyer account. Create contacts for the buyer account and enable those contacts as customer users.

Use a Person Account to Create a Buyer for B2B Stores

Create a person account and enable it as a buyer account and a customer user. The individual identified in the person account has access to stores related to the account's buyer group.

Add Accounts to a Buyer Group for B2B Stores

To give multiple accounts access to the same store, price books, and entitlements, create a buyer group and add the accounts.

Associate a Buyer Group with a B2B Store

Product prices and the products that buyers can access depend on the price books and the entitlement policies assigned to the buyer group. When you create a store, a default buyer group is assigned to the store.

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Set the default billing and shipping addresses for buyer accounts.

Allow Buyers Access to External Accounts for B2B Stores

An external account is an account other than the one that a buyer is a contact for. You can enable a buyer to buy for an external account. You can also enable a buyer to manage buyers in an external account by assigning them the Buyer Manager role. A buyer manager can create and activate buyers in other accounts, reset passwords, and view the carts that other buyers create. When shopping in a B2B store, the designated buyer can switch to an external account that they have access to. The buyer can purchase on behalf of that account or manage buyers in that account, depending on how you've configured their privileges.

Mass Enable Accounts as Buyer Accounts

Use any tool or mechanism that can create data inside of Salesforce—for example, Data Loader, Flow Builder, or the sObject API—to enable accounts as buyer accounts.

Use a Business Account to Create Buyers

Enable the business account as a buyer account. Create contacts for the buyer account and enable those contacts as customer users.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

When a business account is enabled as a buyer, you can't merge it with other accounts and you can't convert the business account to a person account. To merge or convert the account, you must disable it as a buyer, merge or convert the account, and then reenable it as a buyer.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. In the App Launcher, find and select **Accounts**.
2. Click **New**.
3. If you're given an option of what kind of account to create, select **Business Account** and then click **Next**.
4. Enter the account information, and click **Save**.

   Important: In the Account Currency dropdown, select the buyer account's preferred currency. If you don't choose an account currency, or if you choose a currency that your store doesn't support, buyers see prices in the store's default currency. The currency you select for the account applies to all buyers on the account, overriding the currency set on an individual buyer's record. If you change the account currency, buyers' in-progress carts are cleared.

5. From the Actions dropdown, select **Enable as Buyer**.
6. Add a contact to the account.

   A contact for a buyer account can access stores to which the account's buyer group is associated.

   a. Click **Related**, and next to Contacts, click **New**.
   b. Enter the contact information, and click **Save**.
   c. Select the new contact and from the Actions dropdown, select **Enable Customer User**.

   d. Enter a username, email, and nickname for the user.
   e. Select the license, profile, and permission set for the user.

      The permission set that you choose determines the kind of access that the buyer has to the store. See Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores.

   f. Click **Save**.

Note: If you disable the account as a buyer, you delete the account's association with buyer groups.

SEE ALSO:

Add Accounts to a Buyer Group for B2B Stores

Associate a Buyer Group with a B2B Store

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Use a Person Account to Create a Buyer for B2B Stores

Use a Person Account to Create a Buyer for B2B Stores

Create a person account and enable it as a buyer account and a customer user. The individual identified in the person account has access to stores related to the account's buyer group.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Make sure that person accounts are enabled for your org. See Enable Person Accounts for Commerce.

When a person account is enabled as a buyer, you can't merge it with other accounts and you can't convert the person account to a business account. To merge or convert the account, you must disable it as a buyer, merge or convert the account, and then reenable it as a buyer.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

1. In the App Launcher, find and select **Accounts**.
2. Click **New**.
3. Select **Person Account**, and then click **Next**.
4. Enter the account information, and click **Save**.

   Important: In the Account Currency dropdown, select the preferred currency. If you don't choose an account currency, or if you choose a currency that a store doesn't support, the buyers see prices in the store's default currency. If you change the account currency, buyers' in-progress carts are cleared.

5. From the Actions dropdown, select **Enable as Buyer**.
6. From the Actions dropdown, select **Enable Customer User**.
7. Enter a username, email, and nickname for the user.
8. Select the license, profile, and permission set for the user.

   The permission set that you choose determines the kind of access that the buyer has to the store. See Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores.

9. Click **Save**.

Note: If you disable the account as a buyer, you delete the account's association with buyer groups.

SEE ALSO:

Use a Business Account to Create Buyers

Add Accounts to a Buyer Group for B2B Stores

Associate a Buyer Group with a B2B Store

Add Accounts to a Buyer Group for B2B Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

To give multiple accounts access to the same store, price books, and entitlements, create a buyer group and add the accounts.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: Unassigning an account assigned to a buyer group by another user requires the Modify All Data on Buyer Group permission.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Customers** > **Buyer Groups**.
3. Click **New**.
4. Enter a name and description.
5. For **Role**, select Account Based.
6. Click **Save**.
7. On the Related tab, next to Buyer Group Members, click **Assign**.
8. Select the accounts that you want to add to the buyer group.
9. Click **Assign**.

SEE ALSO:

Use a Business Account to Create Buyers

Associate a Buyer Group with a B2B Store

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Create a Buyer Group Based on a Data Segment

Configure a Market for Your Commerce Store

Associate a Buyer Group with a B2B Store

Product prices and the products that buyers can access depend on the price books and the entitlement policies assigned to the buyer group. When you create a store, a default buyer group is assigned to the store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and click **Buyer Access**.
3. Click the buyer group that you want to assign to the store.
4. On the Related tab, next to Stores, click **Assign**.
5. Select the store you want to assign to the buyer group.
6. Click **Save**.

SEE ALSO:

Use a Business Account to Create Buyers

Add Accounts to a Buyer Group for B2B Stores

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Set the default billing and shipping addresses for buyer accounts.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

1. Go to your buyer account, and click the **Related** tab.
2. Next to Contact Point Addresses, click **New**.

   You can create up to 2,000 contact point address records. Additional records are dropped.
3. Select the **Address Type**, either **Billing** or **Shipping**.
4. If you want this address to be the default address, select **Is Default Address**.
5. Enter the address.

   For stores based on LWR (Lightning Web Runtime), only two-digit ISO codes are allowed for the Country and State or Province. We recommend that the Salesforce Admin enable state and country picklists so that only allowed values are available to select. See Enable and Disable State and Country/Territory Picklists.
6. Save your changes.

SEE ALSO:

Use a Business Account to Create Buyers

Add Accounts to a Buyer Group for B2B Stores

Associate a Buyer Group with a B2B Store

Allow Buyers Access to External Accounts for B2B Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

An external account is an account other than the one that a buyer is a contact for. You can enable a buyer to buy for an external account. You can also enable a buyer to manage buyers in an external account by assigning them the Buyer Manager role. A buyer manager can create and activate buyers in other accounts, reset passwords, and view the carts that other buyers create. When shopping in a B2B store, the designated buyer can switch to an external account that they have access to. The buyer can purchase on behalf of that account or manage buyers in that account, depending on how you've configured their privileges.

A buyer that you designate to access an external account must be assigned the preconfigured Buyer Manager permission set. The assignment must include system permissions or be assigned an equivalent custom permission set. The buyer must have the Customer Community Plus license or a license with a higher level of privileges.

A buyer that you designate to manage buyers in an external account must also have delegated external user administration rights, which you assign to the buyer's profile. For more information, see Delegate External User Administration.

The buyer's account and the external account must be part of buyer groups that are assigned to the same store. You can create up to 200 external managed accounts per user.

1. Configure the buyer's account.
   a. From the buyer's account record, go to the External Managed Account related list.
   b. Click **Configure**.
   c. Enter a name for this external managed account record.
   d. For User, enter the name of the buyer.
   e. For Target Account, enter the name of the external account that the buyer can switch to.
   f. Under Authorized Access, select the privilege level to assign to the buyer for the account and move it to the Selected Access list.

      To allow the buyer to purchase on behalf of the external account, select **Buy For**. To allow the buyer to manage users in the external account, select **Manage Users**.

   g. Save your changes.
2. Share the external account with the buyer.

   You can create Apex-based rules to automate sharing. For more information, see Sharing a Record Using Apex.

   a. From the account record of the external account, select **Sharing** from the dropdown menu.
   b. In the Search dropdown, select **Customer Portal User**.
   c. Search for the buyer.

      Leave Account Access as Read Only.

   d. Save your changes.
3. Add the Account Switcher option to the profile menu in the store.
   a. In Experience Builder, click the profile menu.
   b. Under Authenticated User Options, select **Edit Default User Profile Menu**.
   c. If the Account Switcher menu item is already added, skip to step g. Otherwise, click **+ Add Menu Item**.
   d. In the Type field, select **Modal**.

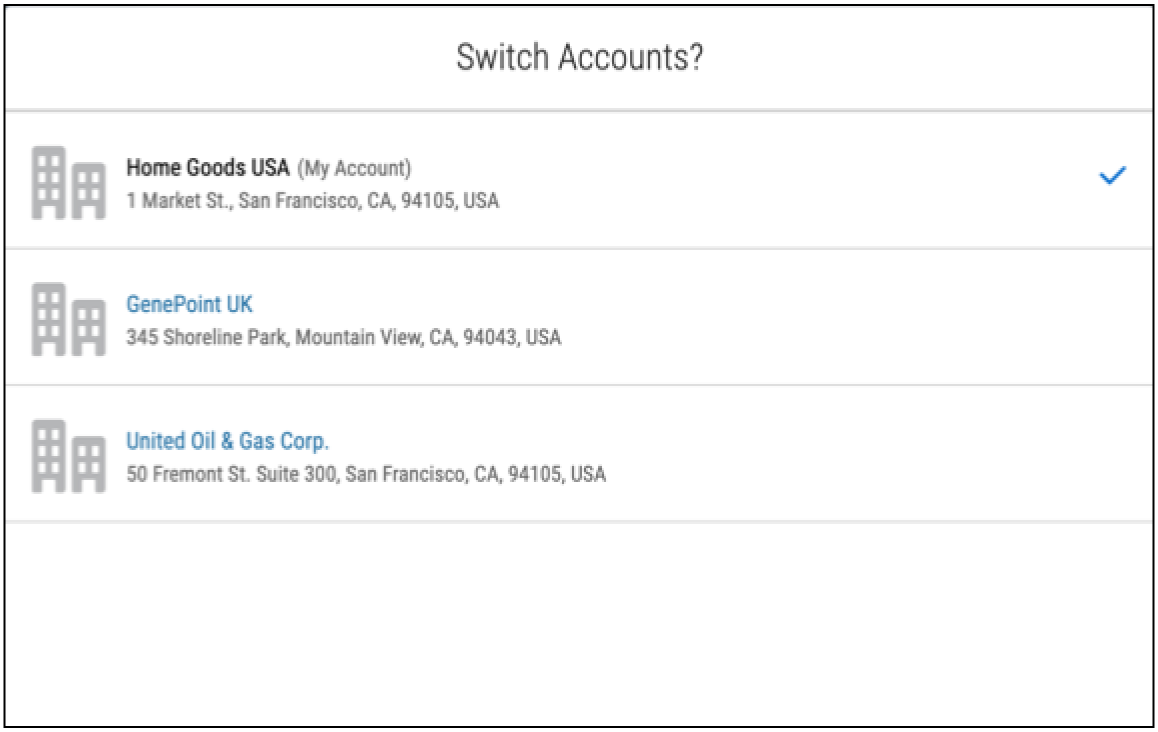
For older stores built on the Aura platform, select **Event**.

e. In the Event field, select **Account Switcher**.

f. Enter a name for the menu item, for example, `Switch Accounts`.

g. Click **Save Menu**.

When the buyer logs into the store, they can select the Switch Accounts option from the user profile menu and choose an external account.



Switch Accounts?

Home Goods USA (My Account)
1 Market St., San Francisco, CA, 94105, USA ✓

GenePoint UK
345 Shoreline Park, Mountain View, CA, 94043, USA

United Oil & Gas Corp.
50 Fremont St. Suite 300, San Francisco, CA, 94105, USA

You can use `{!CurrentUser.effectiveAccountId}` as the Account Id attribute value in components that track account IDs. This value updates the data that's displayed in the component to the account that's being switched to. For example, the Related Record list component shows the Members list on the Account Management page and uses `{!CurrentUser.effectiveAccountId}` in the Parent Record Id field by default. When the user who is managing the target account switches to the target account, the information on the Account Management page switches to the context of the target account. The managing user can manage target account members from there.

To implement behavior based on account switching, you can create a custom component and use the account ID `{!CurrentUser.effectiveAccountId}`.

Note: When setting up an account-based expression, use the expression User.Commerce.EffectiveAccountId to ensure that the buyer's selected account is used and not their user account. If you don't specify an EffectiveAccountId, the system defaults to the user account.

SEE ALSO:

Use a Business Account to Create Buyers

Customize the Profile Menu in a Commerce Store

Mass Enable Accounts as Buyer Accounts

Use any tool or mechanism that can create data inside of Salesforce—for example, Data Loader, Flow Builder, or the sObject API—to enable accounts as buyer accounts.

1. Create Buyer Account records and set two fields: `BuyerId` and `IsActive`.

   Note: Don't put automation on the `IsBuyer` checkbox on Account. Instead place your automation on creation of a Buyer Account.

2. Set the value of the `BuyerId` field to the Account Record Id of the Account that you want to enable as a buyer.
3. Set `IsActive` to `TRUE`.

Manage Guest Access

A guest is someone who isn't logged in to your store as an authenticated customer. Depending on the level of access that you provide, you can let guests browse your store, add products to their cart, and place orders.

Enable Guest Access to a Store

Guest access lets unauthenticated customers browse your store and make purchases. Your products are also discoverable online to anyone. For D2C stores, enable guest access to let guest shoppers use your stores. For B2B stores, enable guest access to let guest shoppers use your stores.

Disable Guest Access to a Store

Disable guest access to prevent unauthenticated guests from browsing your store and seeing your catalog and products.

Enable Guest Access to a Store

Guest access lets unauthenticated customers browse your store and make purchases. Your products are also discoverable online to anyone. For D2C stores, enable guest access to let guest shoppers use your stores. For B2B stores, enable guest access to let guest shoppers use your stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

For D2C stores, person accounts must be enabled before you can enable guest access. See Enable Person Accounts for Commerce

If you configure your Salesforce org by using Commerce Setup Assistant and enable Person Accounts, guest access is automatically enabled when you create a store. No need to manually enable guest access if it's already enabled.

These steps describe how to enable guest access if you want to do so manually.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Buyer Access**.
3. Under Guest Access, click **Enable**.

   If guest access is partially or fully configured, the button is labeled Disable. To reconfigure guest access settings, click **Disable** and then click **Enable** in these scenarios:

   - If guest access settings aren't set up the way you prefer.

- If you associated the store to a site after enabling guest access. This scenario occurs if the store is created through the Order on Behalf Of process or if the store is created programmatically, and not through the Commerce app.
- If you want to ensure guest access is set up correctly.

Reconfiguring guest access overwrites your existing settings.

The system creates a guest buyer profile and turns on cart and checkout access for the profile. By default, the guest cart expires after 168 hours.

If the store is associated with a site, the system also completes these steps.

- Assigns a market to the store and shows the name on the screen.

  If you've set up guest access for a store created before Spring '24 and assigned a buyer group for guest access, the screen shows the buyer group instead of a market.
- In Experience Builder, sets public access to **Guest users can see and interact with the site without logging in**.
- In Digital Experiences, sets the preferences for the store to **Allow guest users to access public APIs**. Record ownership is assigned to the Salesforce admin profile.
- Sets Read access for these objects: Catalogs, Categories, Documents, Electronic Media Groups, Locations, Products, Product Category Products, Stores, and Store Catalogs.

4. Enable **Preserve Guest Cart**.

   In stores created in Spring '24 or later, this setting is enabled by default. Preserve Guest Cart lets a guest log in as an authenticated user without emptying their cart. The cart contents and coupons are transferred from the guest cart to an authorized cart. Delivery and tax calculation details aren't saved.

5. Add entitlements and price books to the market.

   See Configure a Market for Your Commerce Store.

6. To set up search, update the Field Level Security settings for the Product and Product Attribute fields that you want guests to be able to search.
   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, enter `Digital Experiences`, and select **All Sites**.
   c. Next to the name of your store, click **Builder**.
   d. To access settings, click the gear icon and under Guest User Profile, click the profile name link.
   e. Scroll down to Field Level Security, click **Product [View]**, and click **Edit**. For all fields that you want guest users to be able to search, select Read access, and then click **Save**.
   f. If you're using product variations, under Field Level Security, click **Product Attribute [View]**, and click **Edit**. For all fields that you want guest users to be able to search, select Read access, and then click **Save**.
   g. Rebuild the search engine to include products that guest customers are entitled to. See Update the Commerce Search Index.

7. To make sure that you've provided the correct level of access, preview your store as a guest.

   Some settings can take a few minutes to take effect.

8. To ensure that your guests can view product categories, Configure Default Store Navigation.

SEE ALSO:

Disable Guest Access to a Store

Configure Self-Registration for Commerce Stores

Order on Behalf Of a Customer

Search Engine Optimization (SEO) for Commerce

Disable Guest Access to a Store

Disable guest access to prevent unauthenticated guests from browsing your store and seeing your catalog and products.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Buyer Access**.
3. Under Guest Access, click **Disable**.

   This action also unassigns buyer groups from the guest buyer profile.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Enable Guest Access to a Store

Products and Pricing

After you create your store, you can set up your products and pricing.

Catalogs for a Store

A store must have only one catalog that represents the entire collection of products offered through your store. To make it easier for shoppers and buyers to find products, you can group them into categories.

Product Categories

Grouping products into categories makes it easier for shoppers to find products.

Products

When you add products to your store, make them easy to find, and enrich them with images and translations.

Product Bundles and Sets for Commerce Stores

Group products together in bundles or sets to increase sales, manage your inventory, and offer customers convenient buying options and savings. A product bundle is a collection of complementary products purchased under one SKU. The bundle's parent product and child products are shown together on the product page under one price. A product set is a collection of related products displayed to shoppers. Each child product is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual products. Bundles and sets work for most Commerce stores without any administrative setup.

Pricing for Commerce Stores

To set up pricing in your store, configure a standard price book along with custom price books for your store and buyer groups. You can also configure the strikethrough price book that highlights reduced pricing for customers. All products must have an entry in the standard price book before you can add them to other price books. When you create a store, a default price book and default strikethrough price book are assigned to the store.

Catalogs for a Store

A store must have only one catalog that represents the entire collection of products offered through your store. To make it easier for shoppers and buyers to find products, you can group them into categories.

Create a Catalog and Assign It to a Store

Before you can make products available to buyers and shoppers, your store must have a catalog. A catalog is the entire collection of products that you offer through your store. When you create a store, a default catalog is assigned to the store. You can use the default catalog or assign a different catalog to the store. You can assign a catalog to more than one store, but a store can have only one catalog at a time.

Verify That a Catalog Is Assigned to the Store

Your store must have an associated catalog.

Product Readiness

Improve your customers' shopping experience with a comprehensive, consistent level of detail for all products on your storefront. Use Product Readiness to find any products that are missing important elements that can make the product difficult for a customer to understand and purchase. Ensure that all the products in a catalog are storefront ready before you set the catalog to live.

Manage Product Readiness

Product Readiness is available in the Product Workspace. Anytime a custom rule set is enabled or disabled, build an initial score for your catalogs.

Prepare Your Catalog with Product Readiness

Before activating your catalog, run Product Readiness. After checking all products in the catalog against the default rule set, Product Readiness displays which products still need some attention.

Create a Catalog and Assign It to a Store

Before you can make products available to buyers and shoppers, your store must have a catalog. A catalog is the entire collection of products that you offer through your store. When you create a store, a default catalog is assigned to the store. You can use the default catalog or assign a different catalog to the store. You can assign a catalog to more than one store, but a store can have only one catalog at a time.

1. In the App Launcher, find and select **Catalogs**.
2. Click **New**.
3. Enter a name for your catalog, and click **Save**.
4. To assign the catalog to a store, on the catalog's Stores tab, click **Assign Store**.
5. Search for and select a store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

6. Click **Save**.

SEE ALSO:

Plan Your Category Structure

Verify That a Catalog Is Assigned to the Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Your store must have an associated catalog.

1. In the App Launcher, find and select **Catalogs**.
2. Click the catalog that you want to check.
3. On the catalog's detail page, click the **Stores** tab.
    - If your store is listed, the catalog is assigned to that store.
    - If your store isn't listed, assign the catalog to your store.

SEE ALSO:

Create a Catalog and Assign It to a Store

Product Readiness

Improve your customers' shopping experience with a comprehensive, consistent level of detail for all products on your storefront. Use Product Readiness to find any products that are missing important elements that can make the product difficult for a customer to understand and purchase. Ensure that all the products in a catalog are storefront ready before you set the catalog to live.

When you run readiness on a catalog, all the products in that catalog are compared to a set of default rules, which act as criteria for ready products.

- At least one list image
- At least one detail image
- A description
- A SKU
- At least one category

Product Readiness can also recommend categories for your products. To see these recommendations in the Product Readiness details, enable Category Recommendations when configuring Product Readiness.

These rules are part of the default rule set that we provide. You can't add, remove, or edit rules in the default rule set. To change the criteria for readiness, create a custom set of rules to use instead.

SEE ALSO:

Manage Product Readiness

Prepare Your Catalog with Product Readiness

Custom Rules for Product Readiness

Manage Product Readiness

Product Readiness is available in the Product Workspace. Anytime a custom rule set is enabled or disabled, build an initial score for your catalogs.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Product**, and then click **Product Readiness**.
3. To get category recommendations for products, enable **Category Recommendations**.
4. Click **Rebuild Score**.

   Rebuild the score whenever implementing a new custom rule set.

SEE ALSO:

Prepare Your Catalog with Product Readiness

Product Readiness

Custom Rules for Product Readiness

Prepare Your Catalog with Product Readiness

Before activating your catalog, run Product Readiness. After checking all products in the catalog against the default rule set, Product Readiness displays which products still need some attention.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Ensure the Score column appears in the list view.
   a. Click the gear icon, and select **Select Columns to Display**.
   b. Use the arrows to move the Score column from Available Columns to Selected Columns.
   c. Click **Save**.
4. To address a product that doesn't fit the criteria of ready, click the circle in the Score column.
   The Readiness Details panel opens.
5. Go to the product's page to address the missing criteria for each product.
6. After you update your products to meet the criteria of ready, they can be activated.
7. To activate ready products in bulk, filter the list view to show only products with the Active column equal to false. Select the check box for all products with a check mark in the Score column and click **Activate**.

8. Click **Done**.

SEE ALSO:

Product Readiness

Custom Rules for Product Readiness

Create a Catalog and Assign It to a Store

Product Categories

Grouping products into categories makes it easier for shoppers to find products.

Plan Your Category Structure

Categories make products easier to discover in searches and through navigation. Build a category structure that shows product relationships and makes products easier to find. When you create a store, a default catalog with one Products category is assigned to the store.

Create Product Categories and Subcategories

Categories make products easier to discover in searches and through navigation. Design your category structure first, and then create it.

Plan Your Category Structure

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Categories make products easier to discover in searches and through navigation. Build a category structure that shows product relationships and makes products easier to find. When you create a store, a default catalog with one Products category is assigned to the store.

Build your category structure using these elements:

- Categories
- Filters
- Values

Map out your structure before you create it. Keep it as simple as possible without sacrificing product discoverability.

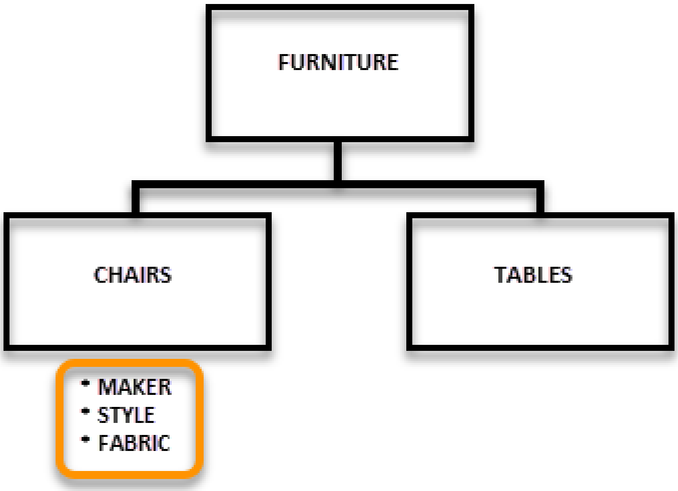
Categories

A category represents the top-level classification of your products or services, for example, furniture, tools, and garden. You can create up to five levels of categories and subcategories. When you create a category, you can choose whether to include it in menus and in which order it appears on the navigation menu and in filters.

You can assign a product to more than one category. For example, a buyer who navigates your store can find chairs and tables under both Furniture and Garden.

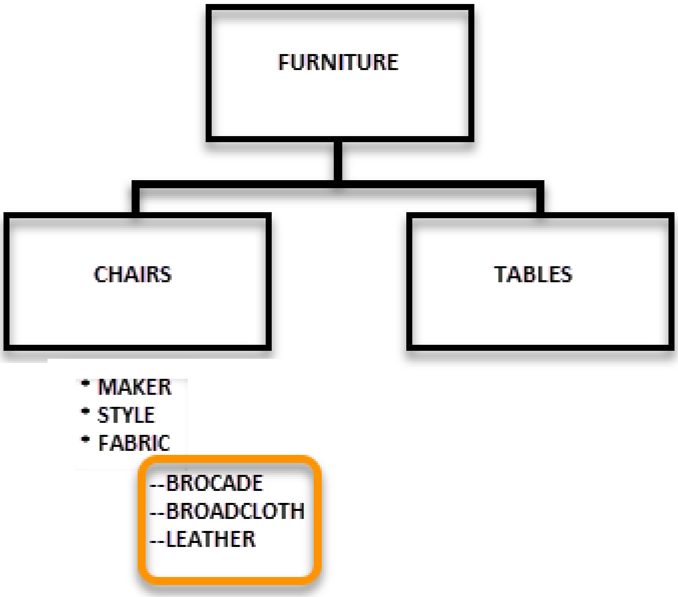
Filters

A filter represents an attribute of a product in the category. For example, the chairs subcategory has filters for maker, style, and fabric. A filter is derived from the fields on a product record. You choose which product fields act as filters.



Values

A value describes a filter's available options. For example, the chair fabric options include brocade, broadcloth, and leather. A value is derived from the fields on a product record. If a filter has values, the values appear under the parent filter on the results page.



SEE ALSO:

Create Product Categories and Subcategories

Create Product Categories and Subcategories

Categories make products easier to discover in searches and through navigation. Design your category structure first, and then create it.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

For information about designing a category structure, see Plan Your Category Structure on page 80.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Categories**.
3. Click **New**.
4. Enter a name for the category and an optional description.
5. If you want this category to appear in a menu, select **Show In Menu**.

   Category changes don't take effect until you rebuild your search index.
6. If you're creating a subcategory, search for and select its parent category.
7. Assign a sort order to the category or subcategory.

   The sort order determines the order in which a category or subcategory appears on the navigation menu and in filters. Let's say you have three categories, Paint, Brushes, and Accessories, and you assign them 1, 2, and 3, respectively. Across the Multilevel Navigation Menu, Paint is listed first, Brushes second, and Accessories third. On results pages, the same order is used for results filters.
8. Enter a code to identify the category.
9. To assign products to the category, click **Assign**, select the products, and then click **Next**.
10. Click **Save**, or click **Save & New** to continue creating categories.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Update the Commerce Search Index

Products

When you add products to your store, make them easy to find, and enrich them with images and translations.

Add a Product to a Commerce Store

In addition to bulk loading products using a CSV file, you can add products one at a time during store setup or from the product workspace using a workflow that consolidates the required information. The workflow assigns the default settings from your selected store regarding the entitlement policy, buyer group, currency, price book, and CMS workspace to the new product, so you don't have to enter that information.

Enhance Product Descriptions with Einstein

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate revised product descriptions for the selected product in your B2B or D2C store. Product descriptions support instructions in English only. You can generate descriptions in all languages in your B2B or D2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Any user can generate product descriptions with Einstein, but only the Salesforce admin can accept or reject recommendations. Contact your account executive for more information.

Enhance Product Fields with Einstein

Generate product text fields for multiple products in one process using Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields support instructions in English only. You can generate product text fields in languages in your B2B or D2C store. Then review the generated text and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

Product Images

You can display different types of images in your store depending on the page or component. You can display an image as an alternate product view on product detail pages, a product list image on search pages, as carts and category views, as a banner to promote a product or category, as a tile for a quick view, and as attachments for detailed information on a product or category.

Product Image Optimization

Store components that include product images automatically scale the images for optimal performance and remain sharp across different devices.

Add Media to Products and Categories

To provide more information about your products and categories, add images and attachments. Images and attachments are pulled from a CMS workspace. You can associate media to parent and variation products.

Add Products to Categories in a Commerce Stores

To make a product available in a store, add it to a category. The maximum number of products in a category is 100,000. You can add products from either the Category workspace or the Product workspace.

Choose Product Categories to Use in Breadcrumbs

The order of breadcrumbs is determined by a combination of a category and product and the date and time that their association was established. The first category that a product is associated with is the product's primary category and becomes the basis of the breadcrumb order. You can customize the default order of breadcrumbs by explicitly identifying categories as primary. When you identify a category as primary, your store uses it to construct the category path that populates the breadcrumbs on the Product Detail page. You can associate a product with multiple categories, but it can have only one primary category.

Purchase Quantity Rules for a B2B Store

Use rules to control the amount of a product that a customer can buy.

Product Variations and Attributes

Use variations to extend the range of products that you offer. For example, add size and color options to a tee shirt. Configure variations to be searchable in your stores and available in multiple languages.

Product Variation Grouping

When you show product search results, you have the option of returning all variation products (the children) or only one (the parent). When all results are shown, no grouping is present. When one result is shown, buyers click that result to see all the parent product's variations.

Entitlement Policies

Entitlement policies are simple entities that bring together buyer groups and products. They define which products a buyer group can see and if the group can also see product prices. When you create a store, a default buyer group is added to a default entitlement policy. B2B stores support multiple entitlement policies. D2C stores support only one entitlement policy.

Add a Product to a Commerce Store

In addition to bulk loading products using a CSV file, you can add products one at a time during store setup or from the product workspace using a workflow that consolidates the required information. The workflow assigns the default settings from your selected store regarding the entitlement policy, buyer group, currency, price book, and CMS workspace to the new product, so you don't have to enter that information.

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Click **New**.

   You can preview your additions on the right. To turn off the preview, click the **Preview** icon.

   To edit the displayed product fields, customize the Product Detail components on the Product page in Experience Builder.

4. Enter the product details.
   a. Enter a product name.
   b. (Optional) Select the product family that this product belongs to.

      Use product families to group products together. You can group products in any way that you want. You can use product family values as filters for search results.

   c. (Optional) Enter a product code.
   d. (Optional) Enter a product SKU.
   e. (Optional) Select a product currency. Your store's default currency is already selected.
   f. To make the product available in your store, select **Active**.
   g. (Optional) Enter a product description.

      A detailed product description improves the shopper experience and makes it easier for customers to understand and purchase a product. See Product Readiness.

5. Complete the pricing fields.

   Your product needs a price to sell in Commerce, but it's not required to add a simple product. See Add Products to a Price Book.

   a. (Optional) Enter a selling price.
   b. (Optional) Enter a strikethrough price.

      To highlight a discount, you can show a strikethrough price next to the selling price. The strikethrough price is the product's original price or manufacturer's suggested retail price. See Set Up a Strikethrough Price Book to Highlight Discounts.

6. To add images or attachments to the product, complete the media fields.

   You can select images and attachments from a CMS workspace or add an image. Only users assigned as workspace contributors can access the CMS workspace media. See Create a CMS Workspace to Import Images to a Commerce Store.

   The list image represents the product in places like search results or in the cart. The list image doesn't display in the live preview. The default image displays first on the product detail page.

7. Complete the organization fields.

  a. Assign the product to up to five categories. You must assign a product to at least one category.

     If you select more than one category after you create the product, identify which category is primary. In the Product Workspace, select the product. In the Categories related list, select the primary category. A store uses the primary category to construct paths for breadcrumbs on the Product Detail page.

  b. (Optional) Create a category from the categories search menu. To create a category, start typing in the search field then select **Create new category** from the dropdown.

8. Click **Save**, or to continue adding products, click **Save & Add**.

After you save your product, go to the product record page to assign additional details, such as variations, localization, and SEO information, or add it to multiple markets. To make a product discoverable in a search, mark it as searchable. See Mark Products as Searchable or Not Searchable.

SEE ALSO:

Choose Product Categories to Use in Breadcrumbs

Import and Export Commerce Data

Enhance Product Descriptions with Einstein

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate revised product descriptions for the selected product in your B2B or D2C store. Product descriptions support instructions in English only. You can generate descriptions in all languages in your B2B or D2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Any user can generate product descriptions with Einstein, but only the Salesforce admin can accept or reject recommendations. Contact your account executive for more information.

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Unlimited** Edition

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using externally, review the output for accuracy and safety. You assume responsibility for the output when making business decisions.

1. Turn on Einstein generative AI in Setup.
2. In the navigation sidebar, select a store from the **Store** dropdown.
3. Select **Merchandising** > **Products**, and then select a product.
4. To add the Einstein Generative AI Recommendation panel:
   a. Click ⚙ at the top of the page, and then select **Edit Page**.
   b. Search for the Einstein Generative AI Recommendation component and drag it to the right side of the page.
   c. Activate and save your changes.

   On the Product record page, the current product description is provided in the Current field of the Einstein Generative AI Recommendation panel.
5. Add a product description if one is missing.
   Default sample text appears.

6. From the Instructions field, add instructions or descriptive information. For example, target a specific audience or provide additional details on the product and its benefits (English only).
   To change the default instruction text, from the Setup icon, select Edit Page and enter a new default instruction for the Einstein GPT Recommendations component.
7. Select **Translate to all languages** if data translations are set up for your organization.
8. To view the newly crafted product description in the Recommendation field, click **Create**. You can edit the text, accept it, or click **Create** to get a new suggestion.
9. To save the generated recommendation, click **Apply**.
   When you return to the Product Workspace, the product contains the newly accepted description.

This change applies to Lightning Experience in the Unlimited Edition with Commerce Einstein and the Einstein Generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein Generative AI for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

For Einstein product fields:

- The request size and response depends on the character length of the product field
- A request is sent for each selected product record

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

SEE ALSO:

Manage Products in the Product Workspace
Einstein Generative AI Solutions
Einstein Generative AI
Enable Data Translation

Enhance Product Fields with Einstein

Generate product text fields for multiple products in one process using Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields support instructions in English only. You can generate product text fields in languages in your B2B or D2C store. Then review the generated text and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Unlimited** Edition

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using externally, review the output for accuracy and safety. You assume responsibility for the output when making business decisions.

These steps describe how to use Einstein to enhance your products’ text fields in a single step.

1. Turn on Einstein generative AI in Setup. Click ⚙ at the top of the page, and then select Setup.
2. In the navigation sidebar, select a store from the **Store** dropdown.

3. Select **Merchandising** > **Products**.
4. From the Product Workspace, select one or more products.
5. Click **Create and Review Field Text**.
6. From the Create and Review Field Text page, complete the Einstein fields and instructions.
    a. Select a product field from the dropdown.
    The dropdown includes all product text fields or custom text fields (of type 'text area'). If you change the default field from Product Description to something else, be sure to update the instructions. You can only generate one field type at a time.
    b. (Optional) Select whether you want text generated for all languages or just your default language.
    c. (Optional) Select whether you want to create customer instructions for each language or use the same instructions for all languages.
    These two language options only appear if you've enabled data translation.
    d. Enter the instructions for Einstein generative AI.
    For example you could enter something like, 'Rewrite the product descriptions to be more appealing to small businesses. Product fields generated with Einstein support instructions in English only. Confirm the accuracy of any non-English generated recommendations.
    e. (Optional) Enter reference data fields you want considered during the generation.
    Reference fields are included in the product record.
7. Click **Create All**.
An alert notifies you that your descriptions are being created for the selected products.
8. You can click **Close** to exit this page. The generation continues to process.
9. To view your results, click **Refresh** in the Product Workspace. You can either click Refresh periodically to wait for their descriptions to be generated, or exit the page and wait for the notification.
If the field text couldn't be created, you're notified to retry.
10. From the Product Workspace, review the content created for the products.
11. Select the language from the dropdown to review the text in a specific language.
12. To revise the suggested text, modify the instructions for Einstein and regenerate.
13. If satisfied with the suggested text, select those products and then click **Accept**.
14. After accepting the content you want applied, you can create field text for the remaining products or reject the text.
    a. To create field text for the remaining products, select the products, revise the instructions for Einstein, and click **Create All**.
    Einstein regenerates the descriptions.
    b. To reject all or selected generated field text, select the products and then click **Reject**. The description reverts to the pre-generated text.
    Resolve all suggested text before generating text for new products.
15. Click **Close** when complete.
Results are stored for seven days.

This change applies to Lightning Experience in Unlimited editions with Commerce Einstein and the Einstein generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein Generative AI for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

For Einstein product fields:

- The request size and response depends on the character length of the product field.

- A request is sent for each selected product record.

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

SEE ALSO:

Manage Products in the Product Workspace
Einstein Generative AI Solutions
Einstein Generative AI
Enable Data Translation

Product Images

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can display different types of images in your store depending on the page or component. You can display an image as an alternate product view on product detail pages, a product list image on search pages, as carts and category views, as a banner to promote a product or category, as a tile for a quick view, and as attachments for detailed information on a product or category.

- Product detail images—You can add up to nine alternate views of a product on the product detail page and specify the order in which they're displayed. The optimal size is 2048x2048 pixels with an aspect ratio of 1:1.
- Product list image—You can add one product list image to a product. The image appears in search, the cart, and category view. The optimal size is 800x800 pixels with an aspect ratio of 1:1.
- Banner image—The image spans across the width of a page. Use a banner to promote a specific product or category. The optimal size is 1260x600 pixels.
- Tile image—Provides a quick view of your product or category. You can add one tile image to a product or category. The optimal size is 500x500 pixels with an aspect ratio of 1:1. If an image isn't square and scaled to fit, it might not display optimally. Tall images with minimal width are scaled to fit the display area and appear as a vertical line.
- Attachments—You can provide detailed information or specifications about a product or category. Attachments appear with the product detail images.
- Site logo—The company logo is the smallest image on a store page. The optimal size is 100x100 pixels with an aspect ratio of 1:1, 2:3, or 4:1.

SEE ALSO:

Add Media to Products and Categories
Product Image Optimization

Product Image Optimization

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

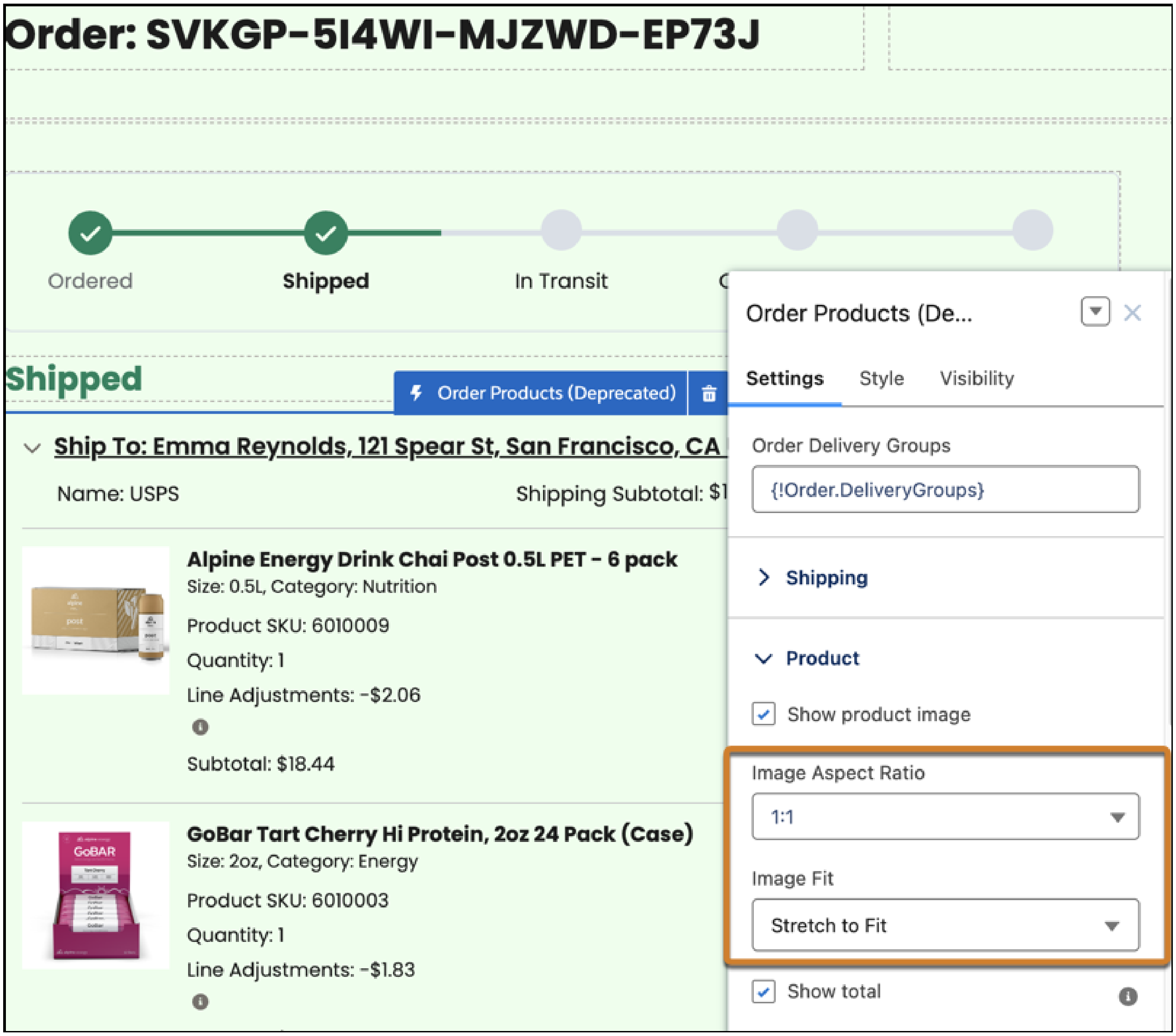
Store components that include product images automatically scale the images for optimal performance and remain sharp across different devices.

By default, these components use an 1:1 aspect ratio for product images and scale the images to fit the image container.

- Cart Items
- Order Line Item
- Order Products
- Order Summary
- Payments By Link
- Product Card
- Product Media Gallery
- Split Shipment Cart Contents
- Wishlist Product

For product image components that have a different aspect ratio, change the aspect ratio value in the component to 2:3, 3:4, or 4:5. You can also select Stretch to Fit or Scale to Fit. To change a component's aspect ratio or image fit, in Experience Builder, click the component and modify the settings.

This image shows the Order Summary component that contains images with the aspect ratio of 1:1 and are stretched to fit.



Order: SVKGP-5I4WI-MJZWD-EP73J

Ship To: Emma Reynolds, 121 Spear St, San Francisco, CA

Name: USPS

Shipping Subtotal: $1

Alpine Energy Drink Chai Post 0.5L PET - 6 pack

Size: 0.5L, Category: Nutrition

Product SKU: 6010009

Quantity: 1

Line Adjustments: -$2.06

Subtotal: $18.44

GoBar Tart Cherry Hi Protein, 2oz 24 Pack (Case)

Size: 2oz, Category: Energy

Product SKU: 6010003

Quantity: 1

Line Adjustments: -$1.83

Order Delivery Groups: {!Order.DeliveryGroups}

☑ Show product image

Image Aspect Ratio: 1:1

Image Fit: Stretch to Fit

☑ Show total

To display high-quality product images, use modern image formats, like AVIF or WebP, instead of JPEG or PNG. If an image has varying aspect ratios, use a transparent background.

To enhance the performance of videos:

- Use modern formats such as WebM or MP4.
- Keep the resolution below 720p, and use a low frame rate.
- Display an assigned image while the video is downloading or until the video is played by adding a poster attribute to the video tag. If you don't add a poster attribute, the video uses the first frame.

SEE ALSO:

Product Images

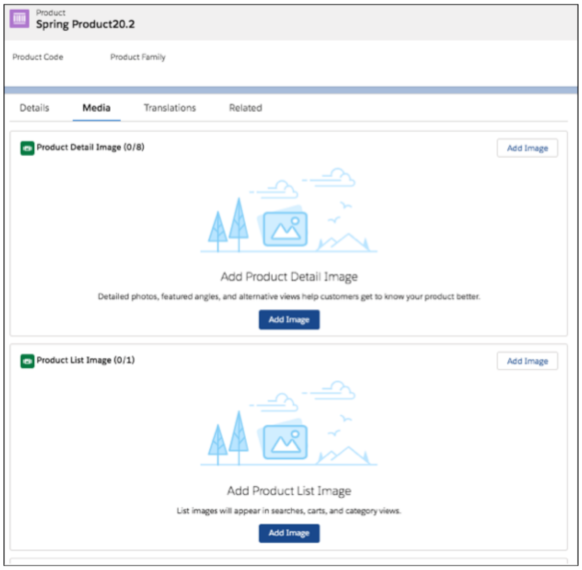
Add Media to Products and Categories

To provide more information about your products and categories, add images and attachments. Images and attachments are pulled from a CMS workspace. You can associate media to parent and variation products.

> **Important:** These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To display an external source on the product detail page, the URL must be added to the CSP Trusted Sites list.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Select a product from the Product Workspace, and scroll to the Media tab.
4. On the Media tab, click **Add Image**.



Detailed photos, featured angles, and alternative views help customers get to know your product better.

List images will appear in searches, carts, and category views.

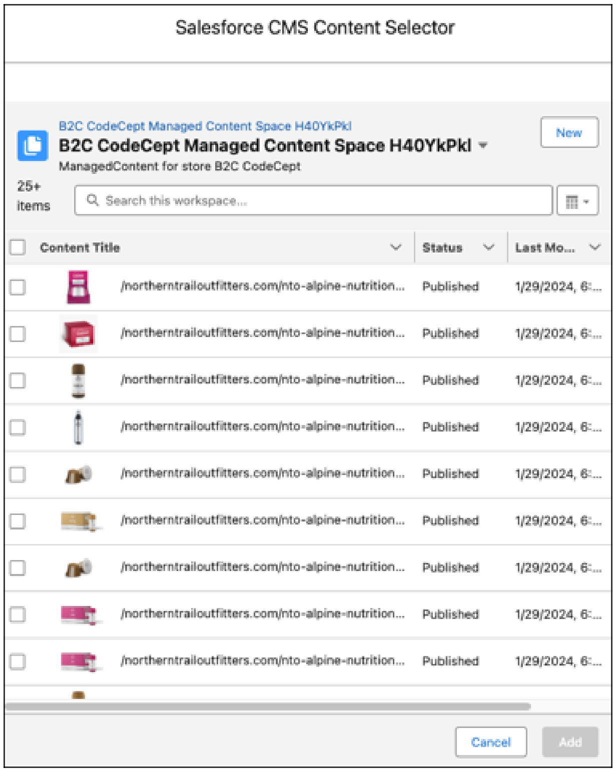
5. In the Salesforce CMS Content Selector screen, select the Managed Content Space for your store.
6. Select the items that you want to add.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce


Salesforce CMS Content Selector
B2C CodeCept Managed Content Space H40YkPkl
B2C CodeCept Managed Content Space H40YkPkl
ManagedContent for store B2C CodeCept
New
25+ items
Search this workspace...
Cancel
Add

☐	Content Title	Status	Last Mo...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...
☐	/northerntrailoutfitters.com/nto-alpine-nutrition...	Published	1/29/2024, 6:...

7. Click **Save**.

Stores based on the LWR platform created in orgs provisioned with Commerce in Summer '23 or later have a public channel to an enhanced CMS workspace. To allow those stores to also access media stored in a non-enhanced workspace, add the store's public channel to the non-enhanced workspace. See Add a Channel to a CMS Workspace.

SEE ALSO:

Product Images

Add Products to Categories in a Commerce Stores

To make a product available in a store, add it to a category. The maximum number of products in a category is 100,000. You can add products from either the Category workspace or the Product workspace.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Manage Products in the Product Workspace

Manage Categories in the Category Workspace

Add Products to a Category from the Category Workspace

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Categories**.
3. Select a category from the list.
4. On the category record page, click ▾ next to Products and select **Assign Products**.
5. Select the products that you want to add to the category, and click **Next**.

   At a time, you can add up to 200 products to a category.
6. On the Edit Products page, you can remove or replace products.
7. Click **Save**.

Under Products, you can see the products assigned to the category.

Add Products to a Category from the Product Workspace

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Products**.
3. Select the products that you want to add to the category.
4. From the Bulk Actions dropdown menu, click **Add to Category**.
5. Select a category, and click **Save**.

Choose Product Categories to Use in Breadcrumbs

The order of breadcrumbs is determined by a combination of a category and product and the date and time that their association was established. The first category that a product is associated with is the product's primary category and becomes the basis of the breadcrumb order. You can customize the default order of breadcrumbs by explicitly identifying categories as primary. When you identify a category as primary, your store uses it to construct the category path that populates the breadcrumbs on the Product Detail page. You can associate a product with multiple categories, but it can have only one primary category.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When a product is associated with just one category, you don't need to explicitly mark the category as primary. By default, that single category is the product's primary category. However, when a product is associated with multiple categories, a primary category can be useful. For example, let's say that your store offers a table saw that's associated with the Power Tools category. This association is reflected in the breadcrumb on the Product Detail page. You're having a sale, so you associate the tool with a Sale category. To have the Sale category appear in the breadcrumb on the tool's Product Detail page, mark Sale as the tool's primary category.

Note: Before you can mark a product category as primary, your admin must set up the layout on the Product object to include the Category related list.

1. In the navigation sidebar, select a store from the **Store** dropdown.

2. Select **Merchandising** > **Products**.
3. Click a product name to open its detail page, and select the **Related** tab.
4. In the Categories section, click the actions dropdown across from the category, and select **Set as Primary Category**.

   Tip: On the Related tab, you can also select **Edit** from a product's actions dropdown, and select **Is Primary Category**.

Keep these behaviors in mind when working with breadcrumbs.

- If a category isn't included in navigation—that is, **Show in Menu** isn't selected—it doesn't appear in the breadcrumb, even if it's marked as primary. Instead, Home is used in the breadcrumb. Also, if the product has only one associated category, and that category is non-navigational, the breadcrumb displays Home.
- If you delete a primary category and that category is the only one assigned to a product, the product becomes unavailable in store navigation. If multiple categories are associated with the product, the oldest product-category association determines which category is primary.
- If you make a primary category inactive, all products that are associated with only that category become unavailable in store navigation. If multiple categories are associated with the product, the oldest product-category association determines which category is primary.
- If you remove a product from the primary category, the product's next category, based on the assigned date, becomes the new primary. If the product doesn't have other categories, it becomes unavailable in store navigation.

SEE ALSO:

Configure Default Store Navigation

Purchase Quantity Rules for a B2B Store

Use rules to control the amount of a product that a customer can buy.

Purchase Quantity Rules for a B2B Store

A purchase quantity rule defines the minimum and maximum amounts of a product that a customer can buy and the number of products that are added with each increase. You can assign one purchase quantity rule to each simple product and product variation. In the rule, the minimum and maximum quantities must be multiples of the increment. For example, minimum 3, maximum 300, increment 3. You can define quantity amounts as whole numbers or as fractions up to four decimal places.

Enable Purchase Quantity Rules for a B2B Store

To make purchase quantity rules available for your store's products, add the Quantity Rule related list to the Product object's page layout.

Create a Purchase Quantity Rule for a B2B Store

You can define the minimum and maximum amounts of a product that a customer can buy and the number of products to add with each increase. You can assign a quantity rule to simple products and product variations. Because parent products aren't sold, they don't need quantity rules.

Purchase Quantity Rules for a B2B Store

A purchase quantity rule defines the minimum and maximum amounts of a product that a customer can buy and the number of products that are added with each increase. You can assign one purchase quantity rule to each simple product and product variation. In the rule, the minimum and maximum quantities must be multiples of the increment. For example, minimum 3, maximum 300, increment 3. You can define quantity amounts as whole numbers or as fractions up to four decimal places.

Assign a purchase quantity rule only to the product that it applies to. For example, let's say you sell two kinds of espresso machines. One is for businesses to put in visitor areas and staff kitchens. Customers can buy as many as they like in any increment, so a quantity rule isn't needed.

The other machine is industrial and sold to commercial customers, like coffee shop chains. For this machine, you receive a volume discount from your distributor. To pass that savings to buyers, you can establish a minimum purchase rule and an increment rule to keep the volume within your distributor's parameters. For example, you can have a five-machine minimum, with a required increment of five with each addition. So your customer can buy 5, 10, 15 machines, and so on.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

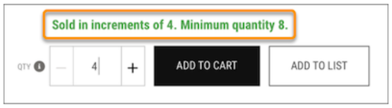
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

You can also control the maximum number for purchase. For instance, you want to ensure that you have enough stock to satisfy all your customers. Or, you want to keep a ceiling on shipping costs. So you limit the number of machines per customer to prevent anyone from cornering the market or to stay under your shipping ceiling.

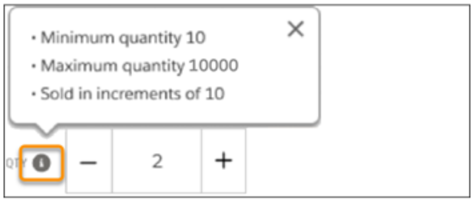
You can set purchase quantity rules in a few places.

- Enable quantity rules through the Object Manager.
- Define values for your rules and assign rules to simple products and product variations in the Product Workspace.
- Add display text for quantity rules using the Quantity Selector properties in Experience Builder components.



Sold in increments of 4. Minimum quantity 8.

The rule text that you specify appears when buyers click the information icon on the quantity selector.



- Minimum quantity 10
- Maximum quantity 10000
- Sold in increments of 10

Cart Items, Product Detail Purchase Options, Quantity Selector, and Results Layout are components that have properties related to quantity rules. Use the properties to enter display text for the quantity rule and to show or hide quantity rules in the store. The components also show the minimum, increment, and maximum in whole numbers and fractional quantities. You can view or edit the quantity field with up to two decimal places only on the Order pages. Any other pages that reference these quantity fields also reflect only two decimal places.

Enable Purchase Quantity Rules for a B2B Store

To make purchase quantity rules available for your store's products, add the Quantity Rule related list to the Product object's page layout.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

1. Click ⚙ at the top of the page, then select Setup.
2. Select Object Manager, and in the Quick Find box, find and select **Product**.
3. From the navigation sidebar, select **Page Layouts**, and then select **Commerce Product Layout**.
4. From the Commerce Product Layout menu, select **Related Lists**, and drag the **Quantity Rules** related list to the page layout.
5. Save your changes.

After you enable purchase quantity rules, create and assign them to simple products and product variations.

Create a Purchase Quantity Rule for a B2B Store

You can define the minimum and maximum amounts of a product that a customer can buy and the number of products to add with each increase. You can assign a quantity rule to simple products and product variations. Because parent products aren't sold, they don't need quantity rules.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

> Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

When creating a purchase quantity rule:

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Select a simple product or a product variation, and click its **Related** tab.
4. Next to Quantity Rules, click **Assign**.
5. Click in the **Quantity Rule** field, and select **New Quantity Rule**.
6. Enter the amounts. The minimum and maximum quantities must be multiples of the increment. For example, minimum 4, maximum 400, increment 2.
    - Minimum—The lowest quantity that a customer can buy.
    - Increment—The fixed number of items that are added to the selection when the customer adds more of the same product.
    - Maximum—The highest quantity that a customer can buy.

    You can define the quantity amounts as whole numbers up to one hundred million or, for B2B stores only, as fractions up to four decimal places. For example, for fractional quantities, you can add a minimum of 1.500, a maximum of 1000.5000, or an increment of 1.5000.

    Fractional quantities are visible when a buyer searches for a product, views the product's details, and adds the quantity to the cart. Fractional quantities are available only with B2B store.
7. Name the quantity rule, and save your work.

The Cart Items, Product Detail Purchase Options, Quantity Selector, and Results Layout components have properties related to quantity rules. Use the properties to enter the display text for the quantity rule.

Product Variations and Attributes

Use variations to extend the range of products that you offer. For example, add size and color options to a tee shirt. Configure variations to be searchable in your stores and available in multiple languages.

Add Product Variations and Attributes with Guided Setup

The guided setup walks you through creating attributes and assigning them to variations with clear step-by-step instructions and navigable links. It also helps you configure search and localization.

Product Classes, Variations, and Attributes

A product class determines whether a product is sold individually or can have variations. The values of the product's attributes define the variation. Each variation has its own SKU so that you can track it as a unique product record. You can group up to five attributes and assign the attribute set to a product.

Create Attributes for Product Variations

When you create attributes, you identify the features that describe individual product variations. Rather than assign individual attributes to a parent, you group the attributes into an attribute set, which you then associate with one or more products.

Add an Attribute Set to a Product

You can add an attribute set to one or more products, but you can associate a product with only one attribute set.

Make Product Variations and Variation Attributes Searchable

Set up Search for product variations and variation attributes so that they're discoverable in your store.

Add Product Variations and Attributes with Guided Setup

The guided setup walks you through creating attributes and assigning them to variations with clear step-by-step instructions and navigable links. It also helps you configure search and localization.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Product**.
3. Review the information on the **Get Ready** tab, and then follow the guided setup to add product variations and attributes.

   Each variation has its own SKU. You can track each SKU as a unique product record.

SEE ALSO:

Product Variations and Attributes

Add an Attribute Set to a Product

Product Classes, Variations, and Attributes

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

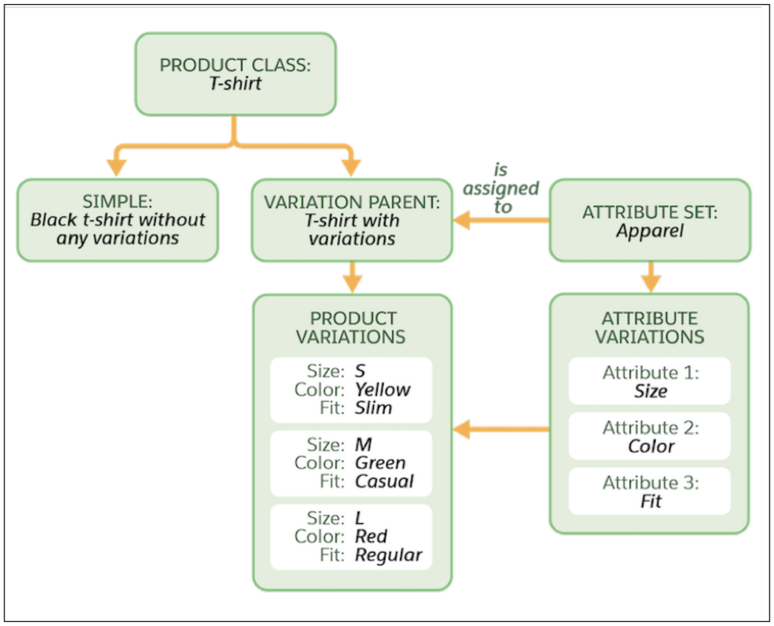
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

A product class determines whether a product is sold individually or can have variations. The values of the product's attributes define the variation. Each variation has its own SKU so that you can track it as a unique product record. You can group up to five attributes and assign the attribute set to a product.

For example, you could define an attribute set called Apparel that includes five attributes: size, color, fit, fabric, and pattern. You can then use the Apparel attribute set to define variations for all products that are clothing. Each variation has its own SKU.

To track product class values from the Product Workspace, add the Product Class and Product SKU fields to the Product page layout.


PRODUCT CLASS: T-shirt
SIMPLE: Black t-shirt without any variations
VARIATION PARENT: T-shirt with variations
is assigned to
ATTRIBUTE SET: Apparel
PRODUCT VARIATIONS
Size: S Color: Yellow Fit: Slim
Size: M Color: Green Fit: Casual
Size: L Color: Red Fit: Regular
ATTRIBUTE VARIATIONS
Attribute 1: Size
Attribute 2: Color
Attribute 3: Fit

You can use these product classes.

- Simple—A product that is purchased individually and isn't associated with variations. For example, a black backpack in a single size doesn't have any variations. A simple product has one SKU that customers use to purchase the product.
- Variation Parent—A product that is a parent of variation products. A customer can't purchase a variation parent. Only variations of a parent can be purchased.
- Variation Product—A product that is a child record of a variation parent. Each variation product represents a unique set of attribute values and has its own SKU. For example, consider a variation product that is a child of a Pants variation parent. The variation product uses an Apparel attribute set, which includes these attributes: size (S, M, L), color (Yellow, Green, Red), and fit (slim, casual, regular). So, an example of a variation product can be pants that are assigned the values S, Y, and slim.

  You can create variations only from a product with the Variation Parent product class. Cloning a variation product creates a simple product rather than another variation product.
- Product Set—A collection of related products that can be priced and purchased separately. For example, you can create a collection of floral dresses in a Spring Dresses product set and price each product separately.

This table shows the product elements that each class supports.

Product Element	Simple Product Class	Variation Parent Class	Variation Product Class	Product Set Class
SKU	✓		✓	
Standard & Custom Fields	✓	✓	✓ Cloned from parent variation product	✓
Attribute Set		✓		
Variation Attribute			✓ Unique by SKU	
Images	✓	✓	✓	✓
Attachments	✓	✓		✓
Category	✓	✓	Automatically assigned the same category as the variation parent product	✓
Entitlement	✓	✓	✓ Assign the parent variation product to the entitlement first	
Price	✓	✓	✓	
Orders	✓		✓	
Localization	✓	✓		✓
Tiered Pricing	✓	No	✓	Only for the child products
Searchable in Store	✓	✓ But the parent variation product doesn't appear in stores	✓	✓
Search Index	✓		✓	✓
Add to Cart	✓		✓	
Add to Wishlist	✓		✓	
View in Order Summary	✓		✓	

Product Element	**Simple Product Class**	**Variation Parent Class**	**Variation Product Class**	**Product Set Class**
Inventory	✓		✓	

SEE ALSO:

Product Variations and Attributes

Product Sets

Create Attributes for Product Variations

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When you create attributes, you identify the features that describe individual product variations. Rather than assign individual attributes to a parent, you group the attributes into an attribute set, which you then associate with one or more products.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To create an attribute set, first create individual product attributes, and then group them into a set that you apply to a particular product. For example, the variation parent product is ice cream, and it can use the attributes of flavor, type, and volume. If you group these attributes into a set, you can associate one attribute set rather than three. You can include up to five variation attributes in an attribute set.

Note: After you add an attribute set to a product, you can't modify it.

1. Create product attributes.

   You can't use the same attribute value to differentiate between variations of a product. Each product variation requires a unique attribute value to determine which product variant to display on the storefront.

   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. Select **Object Manager**.
   c. Find and select **Product Attribute**.
   d. Click **Fields & Relationships**, and then click **New**.
   e. For the field's data type, select **Picklist**, and click **Next**.
   f. Enter the picklist details, and click **Next**.
   g. Set the attribute's field-level security to **Visible** for admins and **Read-Only** for all other users, then click **Next**.
   h. Select **Product Attribute Page Layout**.
   i. To add more attributes, click **Save & New**. If you're done, click **Save**.
   j. To prevent users from creating variants using values that aren't available, click **Edit** and select **Restrict picklist to the values defined in the value set**.

   When you add or change a picklist value for a product attribute, it can take up to 4 hours for the storefront to reflect the change.

2. After you create the attributes for the product, group them into an attribute set.

   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **Settings** > **Product**.
   c. Click **Variation Attribute Sets**.
   d. Click **New**.
   e. Enter a name and description for the attribute set.
   f. Move up to five attributes to the Selected Fields column, and arrange them in the order that you want them to appear.
   g. Click **Save**.

SEE ALSO:

Product Variations and Attributes

Add an Attribute Set to a Product

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can add an attribute set to one or more products, but you can associate a product with only one attribute set.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Make sure that the attribute set is already created. You can associate an attribute set to more than one product, but a product can be associated with only one attribute set.

1. Create a variation parent product.
   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **Merchandising** > **Products**.
   c. From the page dropdown menu, select **Create Variation Parent**.
   d. Click the **Product Attribute Set** field, and select the attribute set to associate with this product.
   e. Enter the variation parent details, and save your work.
2. Create a variation of the parent product. You can create variations only from products in the Variation Parent product class. We recommend that you don't modify custom picklist values of an attribute set after it's associated with a variation product and store.
   a. From Product Workspace, click the variation parent product that you created or any product in the Variation Parent product class.
   b. Select the **Variations** tab, and click **Create Variation**.
   c. Enter the variation attribute details and the product details.
   d. Save your changes.
3. Assign the variation parent product to a category. The parent product's variations inherit the category assignments from the parent.
   a. From the product, select the **Related** tab.
   b. Go to the Categories related list.
   c. To add the variation parent product to a category, click **Assign**.
4. Assign an entitlement policy to the variation parent product and to each of its variations.

   a. From the product, select the **Variations** tab.
   b. Select the variation products that you want to assign.
   c. Click ▾ and then select Add to Entitlement Policy.
   d. Save your changes.

5. Assign price books to the variation parent product and to each of its variations.
   a. From the product, select the **Variations** tab.
   b. Select the variation products that you want to assign.
   c. Click ▾ and then select Add to Price Book.
   d. Save your changes.

SEE ALSO:

Product Variations and Attributes

Manage Products in the Product Workspace

Make Product Variations and Variation Attributes Searchable

Set up Search for product variations and variation attributes so that they're discoverable in your store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. Add product attributes as searchable fields so that they're included in search indexing.
   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **SettingsSearch**.
   c. Click **Searchable Fields**, and then click **Manage Searchable Fields**.
   d. Select the fields that you want to make searchable, and click **Save**.
2. Add attributes as search filters so that they're visible as facets on results and category pages.
   a. Go back to the Search page, and open the **Results Filters** tab.
   b. Click **Manage Filters**.
   c. Move the attributes to use as search filters to the Selected Fields list.
   d. Arrange the list, and click **Save**.
3. Add the Variation Attributes field to the Results Layout component.
   a. In Experience Builder, open the **Search Results** page.
   b. Select the **Results Layout** component.
   c. In the property editor, click **Add Field**.
   d. Click the added field.
   e. In Edit Field, change the field value to **Variation Attributes**.

   f. Adjust the other properties as needed.
   g. Save your changes.
   h. Repeat these steps on the Category Detail page.

4. Rebuild your store's search index.
   a. Return to the Search page, and open the **Search Index Summary** tab.
   b. Click **Rebuild Index**, and then click **Rebuild**.

SEE ALSO:

Product Variations and Attributes

Product Variation Grouping

When you show product search results, you have the option of returning all variation products (the children) or only one (the parent). When all results are shown, no grouping is present. When one result is shown, buyers click that result to see all the parent product's variations.

Get to Know Product Variation Grouping

Use product variation grouping to show product variations grouped under their parent products when the buyer searches for or navigates to a set of results.

Change Search Settings for Product Variation Grouping

If your store was created after Summer '21, product variation grouping is enabled by default, so you don't need to change your Search settings. If your store was created before Summer '21, you must enable product variation grouping in your Search settings.

Product and Variation Naming Guidelines

Help customers find what they're searching for with these parent product and variation naming guidelines.

Set Up a Product Variation Grouping

To simplify search results for products with variations, you can set up a product variation grouping. This lets buyers navigate from a parent product to its child variations.

Get to Know Product Variation Grouping

Use product variation grouping to show product variations grouped under their parent products when the buyer searches for or navigates to a set of results.

A product can be simple, without any variations, like a tool. Or a product can have many variations, like an item of clothing, with each variation having its own SKU. For example, your store offers one-size-fits-all gardening gloves in one color. The gloves are a simple product without variations. You also sell shirts that come in sizes from XS to XL and several colors. Each color-size combination, such as red XS or blue XL, is a product variation, and each has its own SKU.

Let's say someone is shopping for gloves and a shirt. You have options for how to show product variations when the buyer searches for or navigates to a set of results.

- No product variation grouping—You show simple products and each variation product individually. So when the buyer searches for `gloves shirt`, the results page shows one pair of one-size-fits-all gloves and each color-size shirt combination.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- Variation grouping—You show simple products and variation parent products on the initial results page. So when the buyer searches for `gloves shirt`, the results page shows one pair of gloves, a simple product, and one shirt, the variation parent product. On the shirt parent product, buyers click a button or link that takes them to a detail page that shows all the color-size combinations.

Important: Pay close attention to naming conventions for parent products and their variation products. Variation grouping searches, sorts, and filters using the attributes of product variations, but it shows results using the variation parent name. If one parent's variant product attribute alphabetically precedes another parent's product variant attribute, those parents can appear out of order in sort by name results.

When you set up variations, you can choose whether to group product variations together on a results page.

SEE ALSO:

Product and Variation Naming Guidelines

Set Up a Product Variation Grouping

Change Search Settings for Product Variation Grouping

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

If your store was created after Summer '21, product variation grouping is enabled by default, so you don't need to change your Search settings. If your store was created before Summer '21, you must enable product variation grouping in your Search settings.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**, and then click **Results Display Settings**.
3. Under Results Grouping, click the pencil, select **Group Variations Under Parent**, and save your changes.

   It can take up to 2 minutes for the change to take effect.

SEE ALSO:

Set Up a Product Variation Grouping

Product and Variation Naming Guidelines

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Help customers find what they're searching for with these parent product and variation naming guidelines.

Variation grouping searches, sorts, and filters using the attributes of product variations, but it shows results using the variation parent name. To help avoid confusion in search, sort, or filter results, use these guidelines.

- Include the base stock-keeping unit (SKU) in the name of each parent.
- When naming variation products, include the name of the parent variation as a prefix and a combination of the associated variations and the variation SKU.
- When creating descriptions for variation products, use a combination of the parent product description and information specific to the product variation.

For example, say a variation group for two ski goggle parent products has two attributes: Size (S, M, L) and Lens Color (black, blue, green, orange, red, pink). This table provides suggestions for naming the parent products and their medium (M), large (L), red-lensed variations.

Parent Product Name	Variation Product Names
Ski Pro Slalom Snow Goggles, SKU: 123456	• Ski Pro Slalom Snow Goggles M Red, SKU 123456-25 • Ski Pro Slalom Snow Goggles L Red, SKU 123456-26
Ski Pro Super-G Snow Goggles, SKU: 456789	• Ski Pro Super-G Snow Goggles M Red, SKU 456789-25 • Ski Pro Super-G Snow Goggles L Red, SKU 456789-26

SEE ALSO:

Get to Know Product Variation Grouping

Set Up a Product Variation Grouping

Set Up a Product Variation Grouping

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

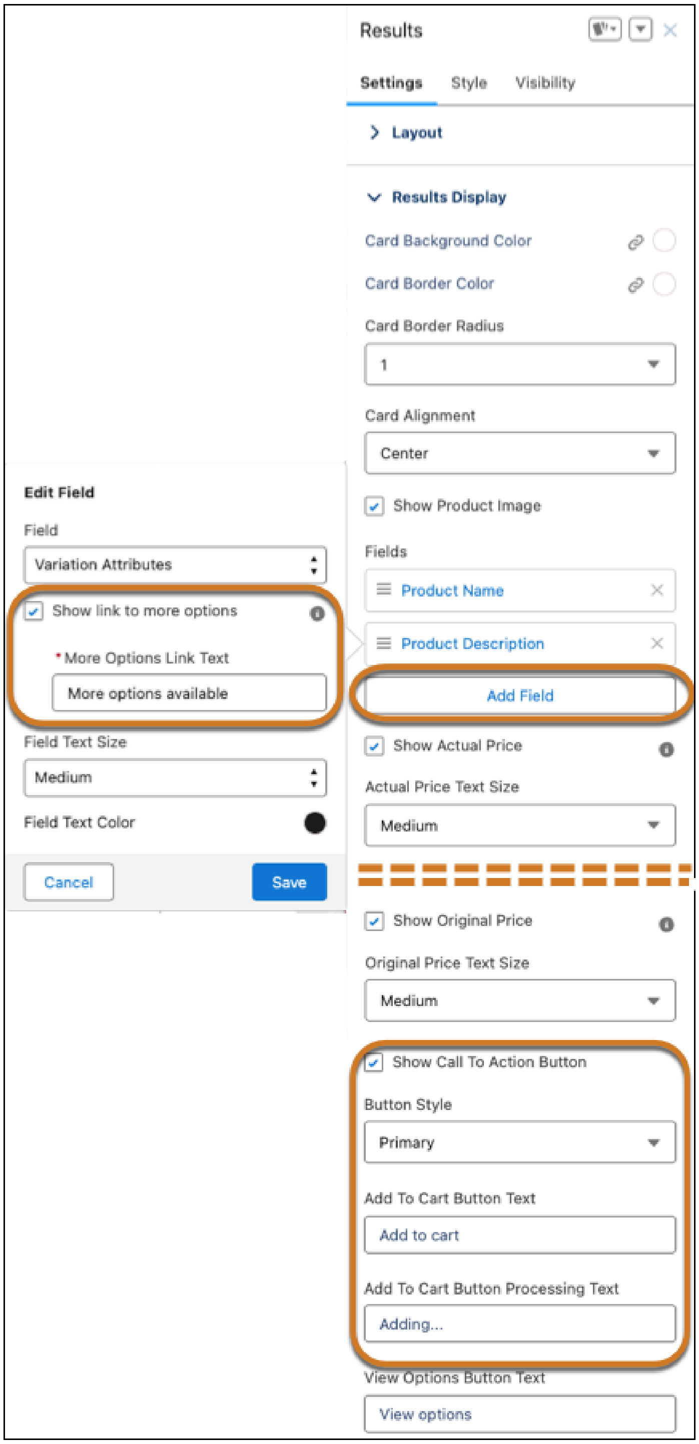
To simplify search results for products with variations, you can set up a product variation grouping. This lets buyers navigate from a parent product to its child variations.

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

If your store was created after Summer ’21, some of these steps have already been done for you.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open Search or the Category Details page, and click the **Results** component.

   Each storefront instance of the Results component is independent from other component instances. So you must set up properties on each storefront instance.
4. In the component property editor, under Results Display, click **Add Field**, and click the new field.
5. In the Edit Field panel, for Field, select **Variation Attributes**.
6. Select **Show link to more options** so buyers can click the link to navigate from a parent product to its child variations.
7. Enter the other Edit Field properties, and save your changes.



Results

Settings Style Visibility

Layout

Results Display

Card Background Color

Card Border Color

Card Border Radius: 1

Card Alignment: Center

☑ Show Product Image

Fields

Product Name

Product Description

Add Field

☑ Show Actual Price

Actual Price Text Size: Medium

☑ Show Original Price

Original Price Text Size: Medium

☑ Show Call To Action Button

Button Style: Primary

Add To Cart Button Text: Add to cart

Add To Cart Button Processing Text: Adding...

View Options Button Text: View options

Edit Field

Field: Variation Attributes

☑ Show link to more options

* More Options Link Text: More options available

Field Text Size: Medium

Field Text Color: ●

Cancel Save

8. Select **Show Call To Action Button**, and enter the button text.

   Buyers can click the button, but clicking anywhere in the card takes them to a view of the parent product's variations.

9. In Experience Builder, click **Publish** to add the changes to your store.

SEE ALSO:

Change Search Settings for Product Variation Grouping

Entitlement Policies

Entitlement policies are simple entities that bring together buyer groups and products. They define which products a buyer group can see and if the group can also see product prices. When you create a store, a default buyer group is added to a default entitlement policy. B2B stores support multiple entitlement policies. D2C stores support only one entitlement policy.

Create an Entitlement Policy

Create an entitlement policy declaratively, through the Commerce app.

The components used before the introduction of B2B and D2C templates don't respect associated entitlements. Any customer can see the content in those components, regardless of their entitlements. Consider this behavior before adding components in your store. Also, only B2B or D2C Commerce can recognize the entitlement policies that you create.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Note: Buyers and shoppers need record-level sharing access to see standard record detail components.

1. In the App Launcher, find and select **Entitlement Policies**.
2. On the Entitlement Policies page, click **New**.
3. Give your policy a name and add a description.
4. Select whether the buyer groups added to this policy can see products, and then select whether those buyer groups can also see product prices.

   For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce customer support to enable this functionality. This feature is available only for catalogs with fewer than 500,000 products.

5. For a buyer to view a category or its descendent categories, ensure that the buyer or guest user has an entitlement to at least one product within the category. If a buyer has a direct link to a category that isn't entitled, the category appears but doesn't show any products.
6. To enable the policy, click **Active**.

   After you save a policy, you can't update an entitlement policy's View Product or View Price in Catalog fields.

7. Click **Save**.
8. Click **Related**.
9. Assign products to the policy.
10. Assign buyer groups to the policy.

11. Rebuild your search index for your changes to take effect.

SEE ALSO:

Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores

View Your Store's Buyer Groups and Entitlement Policies

Make sure that your customers have access to the correct products in your store by checking your buyer groups and associated entitlement policies. A B2B or D2C store can have multiple buyer groups and markets. You can also assign products to multiple entitlement policies and associate the policies to different buyer groups to determine which customers can access the products in the store.

1. In the navigation panel, select a store from the **Store** dropdown.
2. Click **Store Settings**, and go to the Buyer Access tab.
3. To see the entitlement policy assigned to a buyer group, click the buyer group name and go to the Related tab.
4. To see which products are assigned to an entitlement policy, click the entitlement policy name and go to the Related tab.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Product Bundles and Sets for Commerce Stores

Group products together in bundles or sets to increase sales, manage your inventory, and offer customers convenient buying options and savings. A product bundle is a collection of complementary products purchased under one SKU. The bundle's parent product and child products are shown together on the product page under one price. A product set is a collection of related products displayed to shoppers. Each child product is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual products. Bundles and sets work for most Commerce stores without any administrative setup.

Prepare Your Commerce Store to Sell Product Bundles and Sets

To sell product bundles and sets, you add the Child Components related list to the Product object's page layout. If you've set up your store using the Commerce Setup Assistant or created product sets before, the related list is already added. You then create a product relationship type for both bundles and sets. Most stores already have the product relationship types created.

Considerations for Commerce Product Bundles and Sets

Commerce product bundles and sets can include simple products and variation products as child products. When you have bundles or sets and run Product Readiness for your catalog, Commerce checks for different product scenarios related to the parent and child products. Certain scenarios limit readiness. Before you create and configure a product bundle or product set for your store, keep these considerations in mind to increase readiness and support for other features, like search.

Create a Product Bundle for a Commerce Store

A product bundle is a collection of complementary products purchased under one SKU. The bundle's parent product and child products are shown together on the product page under one price. The bundled products become one product. For example, you create the "Work From Home Desktop Bundle" with a desktop monitor, keyboard, mouse, and monitor stand as the child products. The "Work From Home Desktop Bundle" is the bundle's parent product. You set the price for the bundle at the parent level and price the "Work From Home Desktop Bundle" at $199.99 even though the individual child products are sold separately: desktop monitor priced at $129.99; keyboard priced at $39.99; mouse priced at $15.99; and monitor stand priced at $29.99. The "Work From Home Desktop Bundle" displays all of the individual child products to shoppers under the price of the bundle's parent product.

Create a Product Set for a Commerce Store

A product set is a collection of related products displayed together on the product page. Each child product is priced separately. A product set doesn't have its own price. A shopper can add all the products to the cart in a single operation or selectively add individual products. For example, you create the "Work From Home" product set that includes a desktop monitor, laptop stand, wireless mouse, keyboard, standing desk, and office chair. The product set displays all of these products together on your store, but each product is priced separately. Customers can select which products they want to add to the cart or add the whole set, but purchasing all of the products in the set doesn't afford your customers any savings.

Prepare Your Commerce Store to Sell Product Bundles and Sets

To sell product bundles and sets, you add the Child Components related list to the Product object's page layout. If you've set up your store using the Commerce Setup Assistant or created product sets before, the related list is already added. You then create a product relationship type for both bundles and sets. Most stores already have the product relationship types created.

Note: Most Commerce stores already have the Child Components related list and product relationship types for bundles and sets. However, you have to work through these tasks to verify that your org has these prerequisites set up.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Add the Child Components Related List to the Product Page Layout

The Child Components related list is required to add products to a bundle or set. If you've set up your store using the Commerce Setup Assistant, this list is already added and you can skip this task. If you haven't created product sets before, add this list.

1. Click at the top of the page, and select **Setup**.
2. From the Object Manager, find and select **Product**.
3. On the Page Layouts tab, select **Product Layout**.
4. Select **Related Lists**, and drag the **Child Components** related list to the Related Lists section.

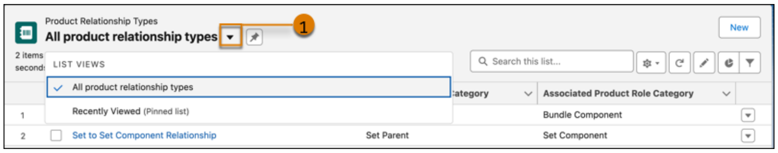
   Search results on the child components related list ignores applied filters.

5. Save your changes.

Create a Product Relationship Type for Bundles and Sets

This relationship type specifies how child products in a bundle relate to the parent product. If you already see these relationship types created for bundles and sets then you can skip this task.

1. In the App Launcher, find and select **Product Relationship Types.**
2. If your list view is set to Recently Viewed, select the dropdown (1) and set it to **All product relationship types**.


Product Relationship Types
All product relationship types
1
New
2 items
second
LIST VIEWS
✓ All product relationship types
Recently Viewed (Pinned list)
Search this list...
ategory
Associated Product Role Category
1
Bundle Component
2
Set to Set Component Relationship
Set Parent
Set Component

3. If you don't see a Bundle to Bundle Component Relationship or Set to Set Component Relationship type, create one for each product type.

4. Create the product bundle relationship type.
    a. Click **New**.
    b. Name the product relationship type `Bundle to Bundle Component Relationship`.
    c. For Main Product Role Category, select **Bundle Parent**.
    d. For Associated Product Role Category, select **Bundle Component**.
    e. Save your changes, or to continue to create the product set relationship type, select **Save & New**.
5. Create the product set relationship type.
    a. Click **New**.
    b. Name the product relationship type `Set to Set Component Relationship`.
    c. For Main Product Role Category, select **Set Parent**.
    d. For Associated Product Role Category, select **Set Component**.
    e. Save your changes.

SEE ALSO:

Create and Configure a Product Bundle

Create and Configure a Product Set

Considerations for Commerce Product Bundles and Sets

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Commerce product bundles and sets can include simple products and variation products as child products. When you have bundles or sets and run Product Readiness for your catalog, Commerce checks for different product scenarios related to the parent and child products. Certain scenarios limit readiness. Before you create and configure a product bundle or product set for your store, keep these considerations in mind to increase readiness and support for other features, like search.

Consideration	More Information
For bundles with simple products, mark both the parent product and child products as active.	Products
For bundles with variation products, mark both the variation product and its parent product as active.	Product Variations and Attributes
Assign a parent product and its child products to the same catalog. However, parent and child products don't need to be in the same category.	If you want to use a product set in multiple stores, assign the product set and its child products to categories from the catalogs for each store. See Catalogs for a Store and Product Categories.
A bundle's parent product must be entitled for a shopper or buyer to view all the products in the bundle. If you want the child products to be sold separately, add an entitlement policy and price book to each child component.	Entitlement Policies

Consideration	More Information
Assign product sets and their child products to the same entitlement policy as your store.	If you want to use the product set in multiple stores, you can assign one entitlement policy per store. See Entitlement Policies.
Set the Quantity Scaling Method for child products to proportional.	When you edit individual child product settings, make sure that the quantity for child products ties proportionally to the quantity of the bundle. For example, if you set a child product's quantity to 2 and increase the bundle quantity from 1 to 2, the child product's quantity increases to 4. See Create and Configure a Product Bundle for a Commerce Store.
Set pricing for child products to inclusive.	Inclusive pricing ensures that the price of the child product isn't listed with the bundle. See Create and Configure a Product Bundle for a Commerce Store.
A product bundle can include up to 200 child products. A product set can include up to 100 child products. A live storefront can display a max of 20 child products at a time.	To increase this limit, contact Salesforce Customer Support.
If a new product bundle or set isn't immediately visible in your store, update your store's search index.	Update the Commerce Search Index
Search results only match queries for the bundle's parent product.	For example, you create a product bundle named `Shirts`. Within the product bundle, you include red shirts, yellow shirts, and blue shirts. If you search for yellow, the search doesn't return a match. Einstein semantic search includes bundles. See AI-Powered Search for Commerce.
To make it easy for customers to add product bundles to their carts directly from the search results page, configure the Add to Cart button on the Results or Results Grid component in your store.	Enable Customers to Add Products to Their Cart from Search Results
A bundle is promoted at the parent level. You can't promote child products within a bundle, and child products within a bundle can't contribute to a qualifying criteria for a promotion.	Considerations for Commerce Promotions
Product bundles and sets are fully supported for inventory.	Set Up Inventory for Commerce Stores
You can't nest bundles.	For example, you can't add an existing product bundle as a child product to a new bundle.
Enable the Cart Calculate API (CCA)	As of the Spring '24 release, CCA is enabled by default for LWR stores. See Cart Calculate API.
You can't use bundles with Salesforce Order Management. See Salesforce Order Management Implementation Guides.	You can use third-party apps or integrations for order servicing and fulfillment.

Consideration	More Information
To use bundles in an Aura store, create custom components for the Product Detail Page and validate your current cart and checkout integrations.	To create custom components for Aura stores, see Introducing Aura Components.

SEE ALSO:

Create and Configure a Product Bundle

Create and Configure a Product Set

Create a Product Bundle for a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

A product bundle is a collection of complementary products purchased under one SKU. The bundle's parent product and child products are shown together on the product page under one price. The bundled products become one product. For example, you create the "Work From Home Desktop Bundle" with a desktop monitor, keyboard, mouse, and monitor stand as the child products. The "Work From Home Desktop Bundle" is the bundle's parent product. You set the price for the bundle at the parent level and price the "Work From Home Desktop Bundle" at $199.99 even though the individual child products are sold separately: desktop monitor priced at $129.99; keyboard priced at $39.99; mouse priced at $15.99; and monitor stand priced at $29.99. The "Work From Home Desktop Bundle" displays all of the individual child products to shoppers under the price of the bundle's parent product.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: The following tasks assume your store has the Child Components related list added to the Product page layout and a product relationship type created for product bundles. Most Commerce stores already have these prerequisite tasks set up. However, if you run into issues configuring your bundle, see Prepare Your Commerce Store to Sell Product Bundles and Sets.

Create a Product Bundle

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Products**.
3. From the Product Workspace dropdown menu, select **New Product Bundle or Set**.
4. For Product Type, select **Bundle**.
5. Enter the product details.
    a. Name the product bundle.
    b. (Optional) Select the product family that the product bundle belongs to.
    c. Enter a product SKU.
    d. To make the product bundle available in your store, select **Active**.
    e. (Optional) Enter a product code.
    f. (Optional) Enter a product description.

    g. Save your changes.

       After you save your changes, you'll be directed to the new product bundle's record page to configure it.

Configure a Product Bundle

1. In the Product Workspace, select the product bundle that you want to configure. Or if you just created your bundle, skip to the next step.
2. Add child products to the bundle. Search results on the child components related list ignores applied filters. To view all search results after a search query, make sure to clear any applied filters before you click **View All**.
    a. On the Related tab, in the Child Components section, click **Add**.

       If you don't see the Child Components section, add it to the Product page layout. See Prepare Your Commerce Store to Sell Product Bundles and Sets.

    b. Select the child products, and click **Next**.
    c. Set the quantity for each child product.
    d. For Product Relationship Type, select **Bundle to Bundle Component Relationship**. If you don't see the bundle product relationship type, See Prepare Your Commerce Store to Sell Product Bundles and Sets.
    e. (Optional) Enter in which order each child product displays.
    f. Save your changes.
3. Assign categories.
    a. On the Related tab, in the Categories section, click **Assign**.
    b. Select the category, and save your changes.
4. Assign one or more entitlement policies.
    a. On the Related tab, in the Commerce Entitlement Policies section, click **Assign**.
    b. Select the policy, and save your changes.
5. Add pricing.
    a. On the Related tab, in the Price Books section, click **New**.
    b. For Price Book, select your store's standard price book.
    c. Enter a list price.
    d. (Optional) Select a currency.
    e. Save your changes.
6. (Optional) Edit the child product settings.
    a. On the Related tab, in the Child Components section, select the child product and click **Edit**.
    b. For Quantity Scaling Method, select **Proportional**.

       This setting ensures that the quantity for child products proportionally adjusts when the bundle quantity changes. For example, if you set a child product's quantity to 2 and increase the bundle quantity from 1 to 2, the child product's quantity increases to 4.

    c. Select **Price includes component**.

       This setting ensures that the price of the child product isn't listed with the bundle.

   - **d.** (Optional) Adjust the quantity of the child product.
   - **e.** Save your changes.

7. Add images to the products from the Media tab.

SEE ALSO:

Commerce Merchant Considerations for Product Bundles and Sets

Create a Product Set for a Commerce Store

A product set is a collection of related products displayed together on the product page. Each child product is priced separately. A product set doesn't have its own price. A shopper can add all the products to the cart in a single operation or selectively add individual products. For example, you create the "Work From Home" product set that includes a desktop monitor, laptop stand, wireless mouse, keyboard, standing desk, and office chair. The product set displays all of these products together on your store, but each product is priced separately. Customers can select which products they want to add to the cart or add the whole set, but purchasing all of the products in the set doesn't afford your customers any savings.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: The following tasks assume your store has the Child Components related list added to the Product page layout and a product relationship type created for product sets. Most Commerce stores already have these prerequisite tasks set up. However, if you run into issues configuring your set, see Prepare Your Commerce Store to Sell Product Bundles and Sets.

Create a Product Set

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Products**.
3. From the Product Workspace dropdown menu, select **New Product Bundle or Set**.
4. For Product Type, select **Set**.
5. Enter the product details.
   - **a.** Name the product set.
   - **b.** (Optional) Select the product family that the product set belongs to.
   - **c.** (Optional) Enter a product SKU.

     Child products require a SKU, but the product set doesn't.
   - **d.** To make the product set available in your store, select **Active**.
   - **e.** (Optional) Enter a product code.
   - **f.** (Optional) Enter a product description.
6. Save your changes.

Configure a Product Set

1. In the Product Workspace, select the product set that you want to configure. Or if you just created your set, skip to the next step.
2. Assign one or more entitlement policies.
   a. On the Related tab, in the Commerce Entitlement Policies section, click **Assign**.
   b. Select the policy, and save your changes.
3. Assign categories.
   a. On the Related tab, in the Categories section, click **Assign**.
   b. Select the category, and save your changes.
4. Add child products to the product set. Search results on the child components related list ignores applied filters. To view all search results after a search query, make sure to clear any applied filters before you click **View All**.
   a. On the Related tab, in the Child Components section, click **Add**.

      If you don't see the Child Components section, add it to the Product page layout. See Prepare Your Commerce Store to Sell Product Bundles and Sets.
   b. Select the products that you want to add to the product set, and click **Next**.
   c. For each child product, specify a sequence and quantity.

      The sequence determines the order that the child product is displayed in the product set. When the product set is shown on a product page, the quantity is the amount that a customer can order for the child product.
   d. For Product Relationship Type, select **Set to Set Component Relationship**.

      If you don't see the set product type, create the set to set component relationship type. See Prepare Your Commerce Store to Sell Product Bundles and Sets.
   e. Save your changes.
5. Add images to the product set from the Media tab.

SEE ALSO:

Commerce Merchant Considerations for Product Bundles and Sets

Pricing for Commerce Stores

To set up pricing in your store, configure a standard price book along with custom price books for your store and buyer groups. You can also configure the strikethrough price book that highlights reduced pricing for customers. All products must have an entry in the standard price book before you can add them to other price books. When you create a store, a default price book and default strikethrough price book are assigned to the store.

Set Up Pricing for Commerce Stores

Select a price book, pricing strategy, and a custom pricing service provider.

Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores

You have multiple options for setting up buyer groups, defining customer entitlements, and assigning the prices that each customer sees. To optimize setup, identify your business requirements. Here are three examples of strategies you can consider for your store.

Set Up a Standard Price Book

Your pricing setup starts with a standard price book. All products must have an entry in the standard price book before you can add them to custom price books for specific stores or buyer groups. You can have only one standard price book.

Add Products to a Price Book

When all your products have a standard price, add them to your other price books.

Create a Buyer Group or Store Price Book

To display prices to your customers, create a buyer group or store price book. You can assign a price book to buyer groups, stores, or both, but you must have at least one. When you assign a price book to a store, any customer who can access the store is eligible for prices within that price book. When you assign a price book to a buyer group, the accounts associated with that buyer group are eligible for prices within that price book.

Set Up a Pricing Strategy in a B2B Store

In your store, you want your pricing to be as transparent as possible. For a B2B store, choose between Best Price and Priority Price to determine which prices your buyers see.

Set Up Lowest List Price Compliance

When you announce a promotion or price reduction, a European Union (EU) mandate requires that stores must show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. D2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. For new stores, the Lowest List Price component is included on the Product Details page. For existing stores, you must add the component to the page. After this feature is enabled, you can't disable it.

Set Up a Strikethrough Price Book to Highlight Discounts

To highlight a discount that you granted to a buyer, you can show a strikethrough price next to the negotiated price. It's called a strikethrough price because the value is shown with a line through it. The strikethrough price is the product's original price or manufacturer's suggested retail price (MSRP). The strikethrough price book is automatically created with your store.

Products and Price Books for D2C Stores

The D2C data import process assigns products to an entitlement policy, which is then associated with the store's buyer group. Prices for all products are assigned to the standard price book and the store price book.

Set Up Price Tiering

To give customers who buy in bulk a price break, create tiered prices based on the number of items purchased. Tiered pricing adjusts prices so that all items receive the discount of the highest tier that the quantity falls in

Set Up Pricing for Commerce Stores

Select a price book, pricing strategy, and a custom pricing service provider.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. In the Pricing section, select a value for **Price Book for Original Price** and **Pricing Strategy**.
4. Optionally, click the **Price Check** tab to select a custom provider.

You can use AppExchange packages to integrate third-party services. If you prefer to integrate a third-party service without using AppExchange, see examples in GitHub.

- Reference Implementations for B2B Commerce
- Reference Implementations for D2C Commerce

To see up an integration, see B2B Commerce and D2C Commerce Developer Guide.

SEE ALSO:

Create a Buyer Group or Store Price Book

Set Up a Standard Price Book

Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

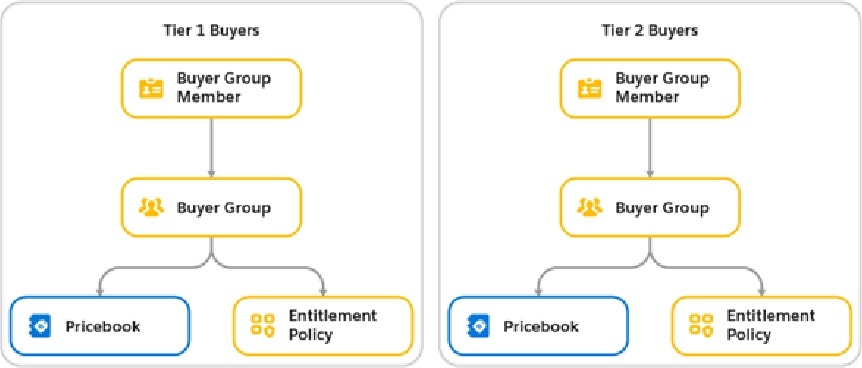
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

You have multiple options for setting up buyer groups, defining customer entitlements, and assigning the prices that each customer sees. To optimize setup, identify your business requirements. Here are three examples of strategies you can consider for your store.

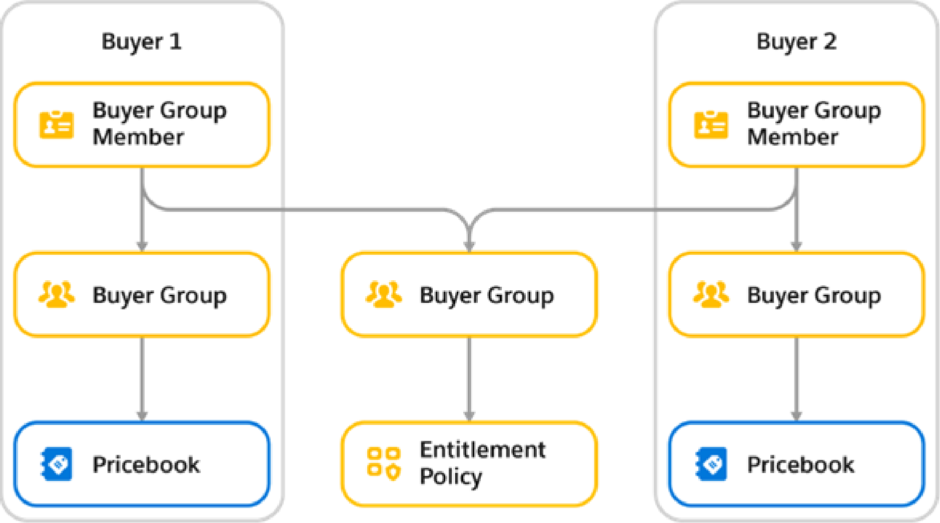
Create Buyer Tiers

Use the buyer tiers strategy to spur buyer incentive. Buyers in higher tiers progressively get access to more products or deeper discounts. For each tier, set up one entitlement policy, one price book, and one buyer group.



Offer Buyer-Specific Pricing

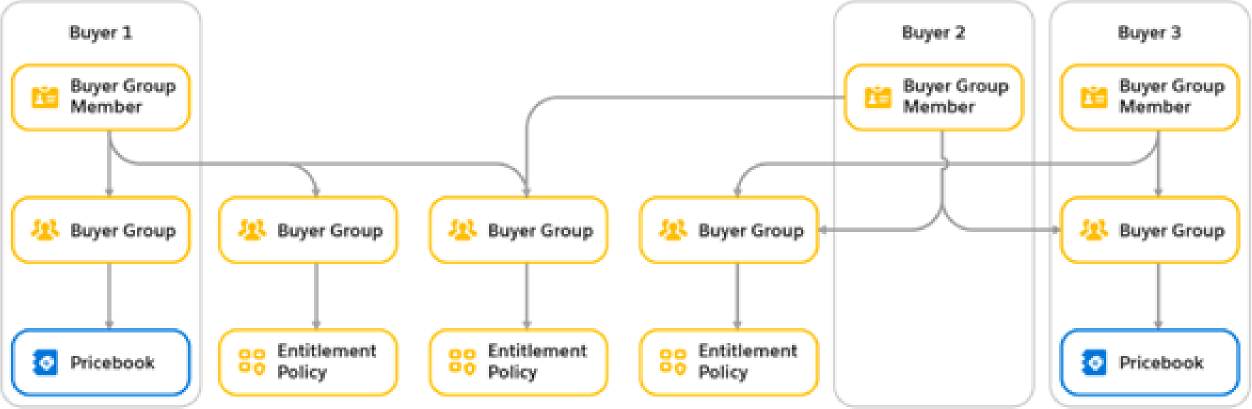
When your goal is to maximize profits, create one buyer group and entitlement policy for all buyers. Then, for each buyer, assign one price book and one buyer group. This strategy lets you set up buyer-specific pricing. This setup also works for use cases with different pricing tiers or groups.



Steer Customers to Specific Products

You can steer customers to specific products by controlling their access. Each buyer can see different groups of products based on their negotiated contract.

For each group of products, create one buyer group and one entitlement policy. Then associate each buyer to the buyer group for each group of products that you want the buyer to have access to. A single account can have membership in up to 20 buyer groups.



SEE ALSO:

- Associate a Buyer Group with a B2B Store
- Entitlement Policies
- Pricing for Commerce Stores

Set Up a Standard Price Book

Your pricing setup starts with a standard price book. All products must have an entry in the standard price book before you can add them to custom price books for specific stores or buyer groups. You can have only one standard price book.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Select an existing product or create one, and scroll to the Price Books section.
4. Click **Add a Standard Price**.
5. Select **Active**.
6. Select a currency.

   For B2B stores, the standard price book contains an entry for every currency that you want to sell an item in. For example, to sell an item in USD and CAD, you make two entries for the same item.

7. In the List Price field, enter the standard price.

   You can add any price as the standard list price. When you add the product to a store or buyer group price book, you can change its price. The price in an assigned price book takes priority.

8. Select a currency.

   For B2B stores, the standard price book contains an entry for every currency that you want to sell an item in. For example, to sell an item in USD and CAD, you make two entries for the same item.

9. If the currency that you selected is the only currency that you plan to use, click **Save**. To add more currency types for the same product, click **Save & New**.

SEE ALSO:

Pricing for Commerce Stores

Add Products to a Price Book

When all your products have a standard price, add them to your other price books.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Pricing**.
3. On the **Price Books** tab, click a price book.
4. Click the **Related** tab.
5. In the Price Book Entries section, click **Add Products**.

6. Select a currency for the products that you're adding.
7. Search for and select products that you want to the price book.

   If you haven't added the product to your standard price book, it doesn't appear in your search.

8. Click **Next**.
9. Add a list price, and click **Save**.

SEE ALSO:

Pricing for Commerce Stores

Create a Buyer Group or Store Price Book

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

To display prices to your customers, create a buyer group or store price book. You can assign a price book to buyer groups, stores, or both, but you must have at least one. When you assign a price book to a store, any customer who can access the store is eligible for prices within that price book. When you assign a price book to a buyer group, the accounts associated with that buyer group are eligible for prices within that price book.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

A store price book is useful for a broad range of users because it sets pricing for the entire store. In contrast, a buyer group price book applies to only the buyer group that it's assigned to. If a buyer user belongs to multiple buyer groups, it's possible for that user to have multiple price books assigned to them. However, a buyer group must be assigned to the store where the price book appears for the buyers to see pricing in that price book.

For guidance on different ways to set up store or buyer group price books for your B2B store, see Strategies for Buyer Groups, Entitlements, and Price Books for B2B stores on page 117.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Pricing**.
3. Click **New**.
4. Give your price book a name.
5. Optionally, add a description and set a valid time period.
6. Select **Active**, and then click **Save**.
7. From your new price book, select the **Related** tab.
8. In the Buyer Groups and Stores sections, click **Assign** and select the buyer groups or stores that you want to assign the price book to.
9. Save your changes.

SEE ALSO:

Pricing for Commerce Stores

Set Up a Pricing Strategy in a B2B Store

In your store, you want your pricing to be as transparent as possible. For a B2B store, choose between Best Price and Priority Price to determine which prices your buyers see.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

In a B2B store, a buyer can be a member of multiple buyer groups, or multiple price books can be assigned to a buyer group or store. So it's possible to have multiple price books assigned to a single buyer. When multiple prices are available to the same user, you can set a pricing strategy to determine which price is shown.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. In the Pricing section, edit Pricing Strategy and select **Best Price** or **Priority Price** and save.
   - Best Price—Assigns the lowest possible price available in all the assigned price books.
   - Priority Price—Assigns prices in the order that you prioritize the price books within a buyer group.
4. In the navigation sidebar, select **Merchandising** > **Pricing**, and then select the price book.
5. From the **Related** tab, navigate to the Buyer Groups section.
6. For the Buyer Group that you want to prioritize the price book, click the action dropdown and select **Edit**.
7. For Priority, enter `1` and click **Save**.
8. Repeat for each price book in your buyer group until they're all prioritized.

Example:

- Best price—In a B2B store, Jamie is assigned to two different buyer groups. The store price book lists a product for $10. One of Jamie's buyer groups lists the item for $9, and the other buyer group lists it for $7. Jamie is technically assigned to all three prices, but because the store uses a best price strategy, the item costs Jamie $7.
- Priority price—Mark is assigned to a buyer group with two assigned price books, Fall Collection and Platinum Buyer. The store admin has changed the pricing strategy to priority pricing and changed the priority order. The admin decides that the Platinum Buyer price book takes first priority. If an item is listed as $15 in the Platinum Buyer price book and $14 in the Fall Collection price book, Mark sees the item as $15.

SEE ALSO:

Pricing for Commerce Stores

Set Up Lowest List Price Compliance

When you announce a promotion or price reduction, a European Union (EU) mandate requires that stores must show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. D2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. For new stores, the Lowest List Price component is included on the Product Details page. For existing stores, you must add the component to the page. After this feature is enabled, you can't disable it.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

This rule doesn't apply to:

- Goods with a short shelf life, such as dairy items.
- Free products or similar promotions, such as buy 2, get 3.
- Users logged in to D2C stores. However, it does apply to guest users.

Deleting a price book or price book entry resets the lowest list price. Manually updating the lowest list price isn't recommended because it can cause an incorrect value for the lowest unit price and then the store isn't in compliance with the mandate.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Pricing**.
3. Expand the **Lowest Unit Price (EU Customers Only)** section, and then enable the feature.
4. Set up layout visibility in Salesforce Setup.
    a. Click ⚙ at the top of the page, and then select Setup.
    b. From Object Manager, find and select **Price Book Entry**.
    c. Select **Fields & Relationships**.
    d. Click **Set History Tracking**.
    e. Click the **List Price** checkbox and save your changes.
    f. Select **Page Layouts**.
    g. Select **Price Book Entry**.
    h. Drag the Lowest List Price field into Fields in the Price Book Entry Detail section.

SEE ALSO:

Pricing for Commerce Stores

Set Up a Strikethrough Price Book to Highlight Discounts

To highlight a discount that you granted to a buyer, you can show a strikethrough price next to the negotiated price. It's called a strikethrough price because the value is shown with a line through it. The strikethrough price is the product's original price or manufacturer's suggested retail price (MSRP). The strikethrough price book is automatically created with your store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Pricing**.
3. Select the strikethrough price book that's automatically generated when you create your store.

   To designate a different price book as your strikethrough price book, select your store from the Store dropdown, store page and select **Settings** > **Store**. On the **General Settings** tab, update the **Price Book for Original Price**.
4. Add entries for the products that require a strikethrough price.
5. Save your changes.

A few things to keep in mind when creating strikethrough pricing:

- When an original price is the same or lower than the negotiated price, only the negotiated price is shown.
- The prices you add to the price book for original prices are the full price of the product or the price that is displayed with a strikethrough. You can update a new or sale price in the store or buyer group price book.
- A product added to the strikethrough price book must have an entry in the store or buyer group price book.
- Strikethrough price is also known as List Price and is stored on the CartItem.ListPrice field when using default Cart Calculator implementations.

SEE ALSO:

Pricing for Commerce Stores

Products and Price Books for D2C Stores

The D2C data import process assigns products to an entitlement policy, which is then associated with the store's buyer group. Prices for all products are assigned to the standard price book and the store price book.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

If you add products without using the D2C data import process, you must assign them to the entitlement policy assigned to the store's buyer group so that shoppers can access the products. For more information, see View Your Store's Buyer Groups and Entitlement Policies on page 108.

To edit existing price books, or to create price books for the store, see Create Price Books and Associate Them with a Store or Buyer Group. For D2C stores, only the Best Price strategy is applicable. The lowest price available in all the store's price books is assigned to the product.

D2C stores support multiple currencies. To offer products in multiple currencies, create a separate store for each currency.

SEE ALSO:

Manage Products in the Product Workspace

Import and Export Commerce Data

Set Up Price Tiering

To give customers who buy in bulk a price break, create tiered prices based on the number of items purchased. Tiered pricing adjusts prices so that all items receive the discount of the highest tier that the quantity falls in

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the App Launcher, find and select **Price Adjustment Schedules**, and click **New**.
2. Name the price adjustment schedule, and select the currency.
3. Click **Save**.
4. Click **Add Tier**.

   Note: When using fractional quantities with tiered pricing, the quantity rounds down to the nearest whole number to determine the tier and apply the appropriate price. For example:

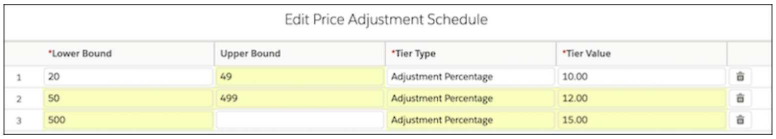
   Default Price: 200

   Tier 1: 1–10 is 10% off

   Tier 2: 11–20 is 20% off

   If a buyer enters a quantity of 10.5, 10% off (Tier 1) is applied. However, the 10.5 quantity is shown in the cart and in checkout.

5. For the lower bound, enter the number of items that must be purchased to reach the first pricing tier.
6. For the upper bound, enter the number of items that must be purchased before the buyer reaches the next tier. If there's no limit, the upper bound isn't required.
7. Choose whether to provide price breaks based on a percentage or a fixed number.



Edit Price Adjustment Schedule

	*Lower Bound	Upper Bound	*Tier Type	*Tier Value
1	20	49	Adjustment Percentage	10.00
2	50	499	Adjustment Percentage	12.00
3	500		Adjustment Percentage	15.00

8. Save your adjustment schedule.
9. Under Is Active, click **Edit**, activate your schedule, and click **Save**.
10. Select **Add Price Book Entries**.
11. Select the price book that you want to add the price adjustment schedule to.
12. In the Add Price Book Entries window, select the products that you want to add the price adjustment to.

13. Click **Finish**.
14. You can manage your price adjustment schedules from the store.
    a. From the Commerce app, in the navigation sidebar, select a store from the **Store** dropdown.
    b. Select **Merchanizing** > **Pricing**, and then click the price book you want to manage.
    c. On the **Related** tab, in the Price Book Entries section, select the action dropdown for a product.
    d. Select **Manage Price Adjustments**.

Example: You want to reduce the price by 10% when a buyer purchases more than 100 items, and 15% for more than 200 items. An item that costs $100 is reduced to $90 after the customer meets the 100-item threshold. It's reduced to $85 dollars when the 200-item amount is met.

You could also choose a fixed amount, such as reducing the price by $10 at every tier level. In that case, an item costs $90 after 100 items, and $80 after 200 items.

SEE ALSO:

Pricing for Commerce Stores

Configure Checkout for a Commerce Store

Add checkout functionality to your B2B or D2C store, including payment, shipping, and tax calculation services. If you have a D2C store, use the default managed checkout for a simple setup with automated store defaults for payment, tax, and shipping. If you have a D2C store and need options for third-party calculation services and want to design your own checkout page, switch to custom checkout. If you have a B2B store, you can only use custom checkout. Managed checkout doesn't support subscriptions.

Watch the video to help you decide which checkout solution works best for you store.

Watch a video

Configure Managed Checkout for a D2C Store

By default, a new D2C store uses managed checkout, which includes smart store defaults for a streamlined checkout setup. To set up your checkout service, follow the guided steps for each section. A default shipping profile based on your store location and currency settings is configured for you. You can change your profile and rates at any time.

Custom Checkout for a Commerce Store

Use custom checkout to have more control over checkout configuration for your store. If you have a B2B store, custom checkout is the only checkout configuration available. With custom checkout, you can extend the Salesforce native checkout services or use third-party apps. Design your own checkout page in Experience Builder with preset layouts or by adding custom sections and components.

Address Autocomplete Considerations for Managed Checkout in D2C Stores

Customers checking out in a D2C store configured with managed checkout can enter text in shipping and billing fields and select possible matching addresses from a picklist. When a customer selects a match from the picklist, their address fields are populated automatically. Address autocomplete isn't available for D2C stores configured with custom checkout or for B2B stores. Get familiar with these considerations for using address autocomplete.

Manual Salesforce Tax Solution for a Commerce Store

You can set up taxes for your B2B or D2C store using the manual Salesforce tax solution. The manual tax solution is available only with a custom checkout configuration. Configure tax rates and tax treatments and assign them to the store's tax policy.

Configure Commerce for Salesforce Billing

Salesforce Commerce and the Salesforce Billing package work together after some preliminary setup. To ensure successful interoperability, make sure that your product records contain values for fields required by Salesforce Billing. Also make sure that your admin correctly sets field-level permissions for the Buyer profile.

Resolving Asynchronous Order Failures in a Commerce Store

D2C or B2B stores created with the LWR template in Spring '23 or later process orders asynchronously. Asynchronous order processing improves store performance and responsiveness. However, when an order is processed asynchronously, the store can sometimes generate failed orders (PlaceOrderFailed exceptions). To handle these exceptions, you give the Commerce admin access to the Process Exception object and activate the Retrigger Place Order flow.

Preparing for High Scale Order Processing in Commerce

Starting in Summer '24, the High Scale Orders feature is enabled by default during checkout for new B2B and B2C stores created with the LWR template. However, some initial setup is needed to ensure that the High Scale Orders feature is fully enabled. In addition, developers must understand how this feature can affect their Apex code. The High Scale Orders feature isn't supported for B2B Aura stores.

Enable Split Shipping for Commerce Stores

Let customers ship items in one order to multiple locations. At checkout, customers can split a single cart into multiple shipments. Customers can specify a shipping method and destination for up to 10 shipments per order. You can't use split shipping with managed checkout or with digital or subscription products.

Configure Split Order Fulfillment

When a customer chooses to send products in one order to different addresses, you can fulfill the order from multiple locations. The Split Order Fulfillment flows create a fulfillment order for each address. You can also manually split fulfillment for an order.

Enable Large Cart Support for a Commerce Store

Most stores limit cart size to 500 line items per order. However, if your B2B or D2C store requires a higher limit, you can enable support to process up to 2,000 line items per order. To increase your line item limit, contact Customer Support.

Account Creation for Guest Checkout in B2B Stores

If your B2B store allows guests to purchase products, you can configure whether to create a person or business account for the guest upon checkout. As of Winter '25, person accounts don't need to be enabled for B2B store guest checkout.

Improve Page Performance Using Add-to-Cart in a Commerce Store

To speed up the shopping experience in your LWR store, turn on the Faster Add-to-Cart feature. By splitting processing time across Product and Cart pages, Faster Add-to-Cart improves the response time on a Product page when a customer adds an item to their cart. If your store was created in Winter '24 or later, this setting is enabled by default.

Enable Duplicate Cart Items for a Commerce Store

Let customers add duplicate cart items to their carts, instead of increasing the quantity of a single cart item.

Configure Managed Checkout for a D2C Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

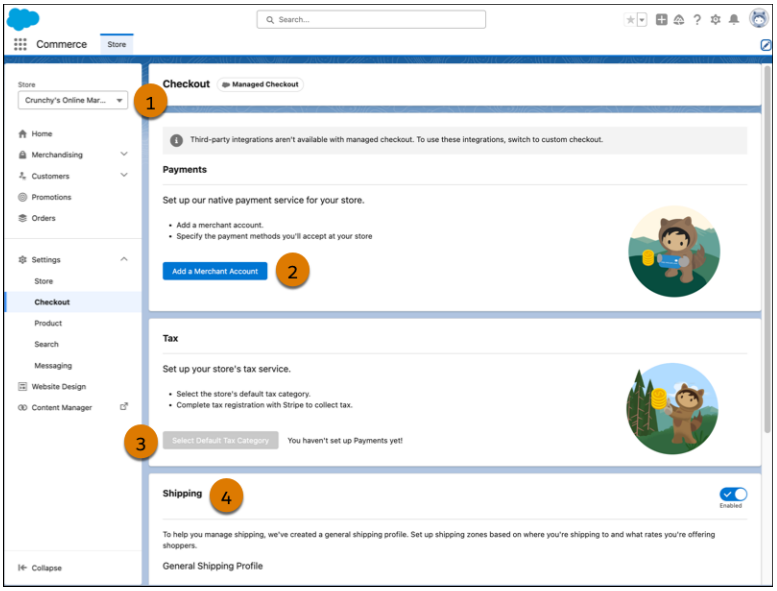
By default, a new D2C store uses managed checkout, which includes smart store defaults for a streamlined checkout setup. To set up your checkout service, follow the guided steps for each section. A default shipping profile based on your store location and currency settings is configured for you. You can change your profile and rates at any time.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

If Cart Calculator API is enabled, you can switch a D2C store between managed and custom checkout at any time. Use Cart Calculate API to customize calculations that occur during checkout. However, when Cart Calculator API is disabled, you can only switch from managed to custom checkout but not the reverse. Cart Calculator API is enabled by default for stores created in the Winter '24 release or later. If you have a store created before Winter '24, enable the Cart Calculator API to switch between checkout types.

If you need options for third-party calculation services and want to design your own checkout page, use custom checkout instead of managed checkout. See Configure Checkout for a Commerce Store.

Watch a video



Third-party integrations aren't available with managed checkout. To use these integrations, switch to custom checkout.

Set up our native payment service for your store.

- Add a merchant account.
- Specify the payment methods you'll accept at your store

Set up your store's tax service.

- Select the store's default tax category.
- Complete tax registration with Stripe to collect tax.

You haven't set up Payments yet!

To help you manage shipping, we've created a general shipping profile. Set up shipping zones based on where you're shipping to and what rates you're offering shoppers.

1. In the navigation sidebar, select a store from the **Store** dropdown (1).
2. Select **Settings** > **Checkout**.
3. To set up Payments, click **Add a Merchant Account** (2), and follow the guided setup.

   Credit cards are the default payment method for the merchant account, but you can add more payment methods during setup. You can also enable manual capture of payments.

4. To set up your store's tax service, click **Select Default Tax Category** (3). Your store's tax category associates your products with the correct tax rates.
5. Click **Configure Tax Registrations**.

On the Stripe dashboard, add registrations to start calculating and collecting tax for a specific location. See Track Your Registrations in the Dashboard.

6. Review your shipping profile (4).

   The shipping profile is based on your store's default settings. You can set up different shipping zones and the rates that you want to offer by clicking **Manage Shipping**.

7. To preview your checkout page, in the navigation menu, click **Website Design** to open Experience Builder and go to the Checkout page.

SEE ALSO:

Address Autocomplete Considerations for Managed Checkout in D2C Stores

Salesforce Payments

Add Payments to B2B and D2C Store Custom Checkout

Enable and Disable the Cart Calculate API for a Webstore

Custom Checkout for a Commerce Store

Use custom checkout to have more control over checkout configuration for your store. If you have a B2B store, custom checkout is the only checkout configuration available. With custom checkout, you can extend the Salesforce native checkout services or use third-party apps. Design your own checkout page in Experience Builder with preset layouts or by adding custom sections and components.

Add a Payment Service for a Commerce Store

Include a payment service as part of your store's checkout process so you can accept payments from your customers, and manage the transactions. If you configure your store using custom checkout, you have to add a payment service manually.

Shipping for Commerce Stores

A shipping calculation service determines how much customers pay for shipping. Use Salesforce's native shipping service or add a third-party shipping integration to your store checkout.

Add a Tax Calculation Service for a Commerce Store

A tax calculation service determines how much customers pay in taxes based on their location. Use the built-in Salesforce tax service, or map a third-party tax calculation service to your store checkout.

Select Salesforce Tax Solution and Set Up a Tax Provider

Use the Salesforce Tax Solution to automatically calculate tax rates, by mapping a third-party tax calculation service, such as Stripe, to your store checkout.

License Requirements for Custom Checkout Order Tracking

To comply with B2B and D2C Commerce licensing requirements, make sure that your custom checkout implementation is tracking orders for Gross Merchandise Value (GMV) and Price Per Order (PPO). If your cart-to-order process invokes the Cart to Order flow core action or the Commerce Webstore Checkout Orders Connect REST API, no additional steps are required.

Add a Payment Service for a Commerce Store

Include a payment service as part of your store's checkout process so you can accept payments from your customers, and manage the transactions. If you configure your store using custom checkout, you have to add a payment service manually.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

If you created a B2B or D2C store with an LWR template, we recommend using Salesforce Payments as your payment service. Salesforce Payments is our native payment service, and it's optimized to work with Commerce. It provides two componenets — Salesforce Payments and Express Checkout that you can add to your checkout page to collect payment information. These components automatically pull in the accepted payment methods that you configured for your store. You can also enable other features, such as allowing customers to save their payment information, or enable manual capture. These components also provide fraud protection using 3D Secure authentication.

If you want to integrate third-party services with your store's checkout, use a different payment provider.

Important: You can customize the checkout page only if you configure your store using custom checkout. If you configure your D2C store using managed checkout, you can't customize the checkout page.

This procedure applies only to custom checkout.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Click **Settings** > **Checkout**, and then click the **Payments** tab.
3. Choose the payment service that you want to use.
    - To use Salesforce Payments, on the Salesforce Payments tile, click **Configure**. Then, set up the merchant account. If you don't see a Salesforce Payments tile, contact your Salesforce account executive.
    - To use a third-party service, on the Alternate Provider tile, click **Select Provider**. Then, select a gateway provider from a third-party package. If no adapter is listed, get one from AppExchange or create one. Check the listings for a package that supports a B2B or D2C store.

After you configure your payment service, confirm that your store's Checkout page is configured correctly. See Customize Payments on a Store Checkout Page.

To integrate a third-party service without using AppExchange, see Reference Implementations for B2B Commerce and Reference Implementations for D2C Commerce. To create a custom package, see Payments Integration in the B2B Commerce and D2C Commerce Developer Guide.

SEE ALSO:

Add Payments to B2B and D2C Store Custom Checkout

Salesforce Payments

Integration Architecture for B2B and D2C Stores (LWR)

Checkout Integration

Shipping for Commerce Stores

A shipping calculation service determines how much customers pay for shipping. Use Salesforce's native shipping service or add a third-party shipping integration to your store checkout.

Set Up Salesforce Native Shipping for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. If you're using custom checkout, you can either use the Salesforce native shipping service or add a third-party shipping service. With the Salesforce native shipping service, you can offer customers default free shipping and flat and price-based rates in a B2B or D2C store created with an LWR template. You can also create custom shipping zones. If your store doesn't ship physical products, you can turn off shipping.

Add a Third-Party Shipping Service for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. Instead of using Salesforce's native shipping service, you can add a third-party shipping application to your store checkout or set up your own shipping service.

Manage Shipping Zones and Rates for Commerce Stores

Whether you're using managed or custom checkout, you can organize countries with similar shipping costs into shipping zones. A zone can include countries with different currencies. For each zone, you can set shipping rates based on the order value or the order weight.

Turn Off Shipping for a Commerce Store

If you're using managed checkout or native Salesforce shipping for custom checkout, you can turn off shipping for stores that don't ship physical products. Turn off shipping for stores offering digital goods, service subscriptions, or in-store pickups.

Set Up Salesforce Native Shipping for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. If you're using custom checkout, you can either use the Salesforce native shipping service or add a third-party shipping service. With the Salesforce native shipping service, you can offer customers default free shipping and flat and price-based rates in a B2B or D2C store created with an LWR template. You can also create custom shipping zones. If your store doesn't ship physical products, you can turn off shipping.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before setting up the shipping service, configure the supported ship-to countries for your store. If you don't have at least one supported ship-to country selected, address validation fails. See Configure Store Languages, Ship-To Countries, Currencies, and Tax on page 316.

1. If you have a store created before the Spring '24 release, execute the native shipping service code for your store. You only need to execute this code one time. If your store was created after Spring '24, skip to Step 2 because native shipping is already included.
    a. Open Developer Console.
    b. Select **Debug** > **Open Execute Anonymous Window**.

       An Apex editor window opens.
    c. Copy this code snippet into the Apex editor window.

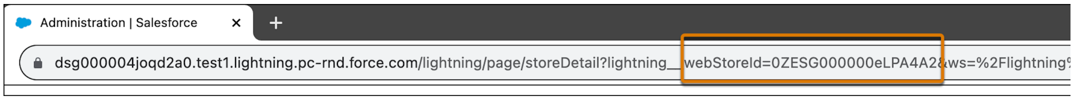
```
ID webStoreId = '0ZE000000000000000'; // !!! please replace !!!
```

```
// 1. Set up the default shipping profile (ShippingConfigurationSet entity object)
ShippingConfigurationSet[] shippingConfigs = new List<ShippingConfigurationSet>();

ShippingConfigurationSet shippingProfile = new ShippingConfigurationSet(Name='General',
TargetRecordId=webStoreId, IsDefault=true);
shippingConfigs.add(shippingProfile);
insert shippingConfigs;


// 2. Set up rate group (ShippingRateGroup entity)
ShippingRateGroup[] shippingRateGroups = new List<ShippingRateGroup>();

ShippingRateGroup shipRateGroup1 = new ShippingRateGroup(Name='Shipping rate group
1',
ShippingProfileId=shippingProfile.Id);
shippingRateGroups.add(shipRateGroup1);
insert shippingRateGroups;


// 3. Set up a shipping zone (ShippingRateArea entity)
ShippingRateArea[] shippingRateArea = new List<ShippingRateArea>();

ShippingRateArea shipRateArea1 = new ShippingRateArea(Name='Shipping rate area US',
ShippingRateGroupId = shipRateGroup1.Id,
Countries='US');
shippingRateArea.add(shipRateArea1);
insert shippingRateArea;

// 4. Set up three simple shipping rates (StandardShippingRate entity)

StandardShippingRate[] standardShippingRates = new List<StandardShippingRate>();

StandardShippingRate shipRate1 = new StandardShippingRate(Name='Free Shipping 7-10
Days',
ShippingZoneId = shipRateArea1.Id,
Price=0.0);

StandardShippingRate shipRate2 = new StandardShippingRate(Name='Overnight Shipping',
ShippingZoneId = shipRateArea1.Id,
Price=12.0);

StandardShippingRate shipRate3 = new StandardShippingRate(Name='Express Shipping 2-3
 Days',
ShippingZoneId = shipRateArea1.Id,
ConditionFactor='OrderPriceFactor',
ConditionRangeMin=0.0,
ConditionRangeMax=100.0,
Price=5.0);


standardShippingRates.add(shipRate1);
standardShippingRates.add(shipRate2);
standardShippingRates.add(shipRate3);
```

```
insert standardShippingRates;
```

d. Replace the store ID with your 18-character ID.

   You can find your ID in your store's home page URL. It begins with "webStoreId=".


Administration | Salesforce
dsg000004joqd2a0.test1.lightning.pc-rnd.force.com/lightning/page/storeDetail?lightning__webStoreId=0ZESG000000eLPA4A2&ws=%2Flightning

e. Execute the code, and return to your store's home page.

2. Review your shipping profile and customize the rates as needed.
   a. In the navigation sidebar, select a store from the Store dropdown.
   b. Select **Settings** > **Checkout**, and go to the Shipping tab.

      Your general shipping profile is listed in the Providers section. Your profile is based on your store's default ship-to country and currency.
   c. If you don't ship physical products, disable shipping for your store.
   d. To edit your shipping profile, click **Manage**. See Manage Shipping Zones and Rates for Commerce Stores on page 133.
   e. To set your shipping processing time, click **Edit**.

      The shipping processing time is combined with the delivery time to provide an estimated time of arrival at checkout.

SEE ALSO:

- Integration Architecture for B2B and D2C Stores (LWR)
- Checkout Integration
- Manage Shipping Zones and Rates for Commerce Stores
- Turn Off Shipping for a Commerce Store

Add a Third-Party Shipping Service for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. Instead of using Salesforce's native shipping service, you can add a third-party shipping application to your store checkout or set up your own shipping service.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: In Winter '24, we introduced Commerce extensions for pricing, inventory, shipping, taxes, and other services. While the checkout integrations framework is still supported, we recommend extensions over integrations because they offer more targeted customizations for your B2B or D2C store. Plus, they're available for more Commerce domains. See Get Started With Salesforce Commerce Extensions.

Also, starting in Spring '24, the Cart Calculate API is enabled by default for LWR stores (`OptionsCartCalculateEnabled` is set to true). When this setting is enabled, you can configure extension providers for shipping, but you can't configure integrations for shipping.

You can use AppExchange packages to select third-party services. If you prefer to implement a service without using AppExchange, see examples in GitHub.

- Extension Provider Examples
- Reference Implementations for B2B Commerce (integrations framework)
- Reference Implementations for D2C Commerce (integrations framework)

To implement an integration, see B2B Commerce and D2C Commerce Developer Guide.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Checkout**.
3. Click **Shipping**.
4. If the Cart Calculate API is enabled, click **Select Provider** to select a custom provider.
5. If the Cart Calculate API is disabled, click **Link Integration** to select an integration.

Configure the supported ship-to countries for your store. If you don't have at least one supported ship-to country selected, address validation fails. See Configure Store Languages, Ship-To Countries, Currencies, and Tax on page 316.

SEE ALSO:

Integration Architecture for B2B and D2C Stores (LWR)

Checkout Integration

Enable and Disable the Cart Calculate API for a Webstore

Manage Shipping Zones and Rates for Commerce Stores

Whether you're using managed or custom checkout, you can organize countries with similar shipping costs into shipping zones. A zone can include countries with different currencies. For each zone, you can set shipping rates based on the order value or the order weight.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Settings** > **Checkout**.
3. Go to the Manage Shipping page.
   - If you're using managed checkout, under Shipping, click **Manage Shipping**.
   - If you're using custom checkout, go to the Shipping tab and click **Manage**.
4. Click **New Zone** and enter a name.
5. Select the countries to add to the zone, and click **Save**.
6. Click **New Rate** and enter a name.
7. Set the transit time, price, currency, and the conditions for your rate.

Use shipping conditions to determine which delivery options to show at checkout. For example, you can define shipping rates based on the total order value (price). For example, if the total order value is $50.00, only Rate 1 is displayed at checkout. If the total order value is $300.00, all three rates are shown.

Rate Name	Condition	Shipping Cost
Rate 1	None	$5.00
Rate 2	100 and up $	$6.00
Rate 3	200–500 $	$9.00

Shipping conditions check the total price of the cart after promotions have been applied and before taxes are calculated.

You can also define shipping rates based on weight ranges. For example, if the weight of the items in a shipment is 5 KG or less, only Rate 1 is displayed at checkout. If the weight is 50 KG, all three rates are shown.

Rate Name	Condition	Shipping Cost
Rate 1	None	$5.00
Rate 2	5 and up KG	$6.00
Rate 3	30–50 KG	$15.00

8. Click **Save**.
9. To edit or delete a shipping zone or rate, click ▾.
10. (Optional) Create a shipping product.

    Each cart delivery group method requires a product that represents a delivery charge order product. To select this product, Salesforce shipping looks for a non-variation product that includes `Shipping` in its name. The term `Shipping` in a product name isn't localized. If a matching product exists, its product ID is assigned to the cart delivery group method and mapped to the order delivery method. If a product doesn't exist, a random non-variation product is used for the product ID assignment.

    To set a designated shipping product, create a non-variation product with `Shipping` in its name.

SEE ALSO:

Integration Architecture for B2B and D2C Stores (LWR)

Checkout Integration

Set Up Salesforce Native Shipping for a Commerce Store

Turn Off Shipping for a Commerce Store

If you're using managed checkout or native Salesforce shipping for custom checkout, you can turn off shipping for stores that don't ship physical products. Turn off shipping for stores offering digital goods, service subscriptions, or in-store pickups.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Settings** > **Checkout**.
3. Disable shipping.
    - If you're using managed checkout, under Shipping, turn off Shipping Enabled.
    - If you're using custom checkout, go to the Shipping tab and turn off Shipping Enabled.

SEE ALSO:

Manage Shipping Zones and Rates for Commerce Stores

Set Up Salesforce Native Shipping for a Commerce Store

Add a Tax Calculation Service for a Commerce Store

A tax calculation service determines how much customers pay in taxes based on their location. Use the built-in Salesforce tax service, or map a third-party tax calculation service to your store checkout.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: In Winter '24, we introduced Commerce extensions for pricing, inventory, shipping, taxes, and other services. While the checkout integrations framework is still supported, we recommend extensions over integrations because they offer more targeted customizations for your B2B or D2C store. Plus, they're available for more Commerce domains. See Get Started With Salesforce Commerce Extensions.

Also, starting in Spring '24, the Cart Calculate API is enabled by default for LWR stores (`OptionsCartCalculateEnabled` is set to true). When this setting is enabled, you can configure extension providers for tax calculation, but you can't configure integrations for tax calculation.

If you want to integrate a third-party service, we recommend using an AppExchange package. If you prefer implementing a service without using AppExchange, see reference examples in GitHub.

- Extension Provider Examples
- Reference Implementations for B2B Commerce
- Reference Implementations for D2C Commerce

To implement an integration, see the B2B Commerce and D2C Commerce Developer Guide.

This procedure assumes you're using custom checkout.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Settings** > **Checkout**, and go to the Taxes tab.

   The next steps depend on whether the Cart Calculate API is enabled.

3. If the Cart Calculate API is enabled, click **Select Provider** to select a custom provider. Follow the steps in Select Salesforce Tax Solution and Set Up a Tax Provider on page 136.
4. If the Cart Calculate API is disabled, select an integration. Click **Link Integration**, and then select the service that you want to use.
   - If your store tax type is gross, you can use the Salesforce tax service. To use the Salesforce service, select **Standard Tax, Salesforce Service**. Follow the steps in Select Manual Salesforce Tax Solution and Assign a Tax Policy to a Commerce Store.
   - To use a third-party service, click **Get App from AppExchange**. Download the tax calculation service, and follow the instructions on the AppExchange package. Check AppExchange listings carefully. A package can support only D2C stores, only B2B stores, or both types of stores.

SEE ALSO:

Integration Architecture for B2B and D2C Stores (LWR)

Checkout Integration

Enable and Disable the Cart Calculate API for a Webstore

Select Salesforce Tax Solution and Set Up a Tax Provider

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Use the Salesforce Tax Solution to automatically calculate tax rates, by mapping a third-party tax calculation service, such as Stripe, to your store checkout.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: In Winter '24, we introduced Commerce extensions for pricing, inventory, shipping, taxes, and other services. While the checkout integrations framework is still supported, we recommend extensions over integrations because they offer more targeted customizations for your B2B or D2C store. Plus, they're available for more Commerce domains. See Get Started With Salesforce Commerce Extensions.

Also, starting in Spring '24, the Cart Calculate API is enabled by default for LWR stores (`OptionsCartCalculateEnabled` is set to true). When this setting is enabled, you can configure extension providers for tax calculation, but you can't configure integrations for tax calculation.

To calculate taxes, Salesforce Tax Solution uses Stripe as the tax provider. Before you proceed, create a Merchant account in the Payments app. See Set Up a Merchant Account and Payment Method Set. After you set up the Salesforce Tax Solution, your tax rates are automatically calculated for an order based on shopper and seller location, product type that's sold, and any reverse tax on a transaction.

For a B2B or a D2C store, you can also use the Manual Salesforce Tax Solution. If you want to set up tax rates manually, see Select Manual Salesforce Tax Solution and Assign a Tax Policy to a Commerce Store.

If you want to integrate a third-party service, we recommend using an AppExchange package. If you prefer implementing a service without using AppExchange, see reference examples in GitHub.

- Extension Provider Examples

- Reference Implementations for B2B Commerce
- Reference Implementations for D2C Commerce

To implement an integration, see the B2B Commerce and D2C Commerce Developer Guide.

This procedure assumes you're using custom checkout and that the Cart Calculate API is enabled for your store.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Checkout**, and go to the Taxes tab.
3. For Salesforce Tax Solution, click **Select Provider**, and save your changes.
4. For Tax Type, click ✎ , and select a tax type.
5. Click **Select Merchant Account**, select the merchant account, and save your changes.

   If you've already selected a merchant account and want to modify the account, click **Modify Merchant Account**.
6. Click **Select Default Tax Category**, and select a default tax category for your products.

   Your store's tax category associates your products with the correct tax rates.
7. Click **Configure Tax Registrations** and configure Stripe as the tax provider. See Set up Stripe Tax.
8. Save your changes.
9. If you're managing orders with Salesforce Order Management, you can generate tax reports from the Stripe Dashboard.
   a. From Setup, in the Quick Find box, enter, and select **Flows**.
   b. Clone and activate the Create Tax Transaction and Record Tax Reversal flows. You can also clone and customize the flows to suit your business.

      Note: The Create Tax Transaction and Record Tax Reversal flows are available if Enable Order Events is enabled in the Order Settings page.
10. If the automated business logic encounters an issue that interrupts normal processing, a process exception occurs. Identify the cause and resolve these exceptions. See Process Exceptions.

SEE ALSO:

Enable and Disable the Cart Calculate API for a Webstore

License Requirements for Custom Checkout Order Tracking

To comply with B2B and D2C Commerce licensing requirements, make sure that your custom checkout implementation is tracking orders for Gross Merchandise Value (GMV) and Price Per Order (PPO). If your cart-to-order process invokes the Cart to Order flow core action or the Commerce Webstore Checkout Orders Connect REST API, no additional steps are required.

If not, you must implement an Apex method for order tracking. In your custom cart-to-order process, invoke the `licenseCompliance()` method from the `B2BCheckoutController` class. This method requires you to input the IDs of a cart and the order created from it. You must use the order entity, not a custom object. The order's status category must be `Activated`.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

To verify that your orders are accurately tracked, see View Your Salesforce Org's Usage-Based Entitlements. Confirm that the Amount Used column is populated for Commerce Orders Placed and Commerce GMV.

SEE ALSO:

B2BCheckoutController Class

Commerce Webstore Checkout Orders

Flow Core Action for Checkout Flow: Cart to Order

Address Autocomplete Considerations for Managed Checkout in D2C Stores

Customers checking out in a D2C store configured with managed checkout can enter text in shipping and billing fields and select possible matching addresses from a picklist. When a customer selects a match from the picklist, their address fields are populated automatically. Address autocomplete isn't available for D2C stores configured with custom checkout or for B2B stores. Get familiar with these considerations for using address autocomplete.

- To populate address details, Commerce D2C stores use the same Google Maps Geocoding API that Salesforce Maps and Location Services uses. If the Geocoding API can't map or parse an address component, autocomplete can't populate the address field.
- Google Maps Geocoding API doesn't filter results based on the selected country or your store's supported ship-to countries. See Configure Language, Ship-To Countries, and Currencies for a D2C Store.
- Autocomplete populates the Address, City, State or Province, ZIP or Postal Code, and Country or Region fields.
- Autocomplete doesn't populate apartment numbers, suites, or additional address information.
- Autocomplete address picklist results are optimized for these countries:
  - Australia
  - Brazil
  - Canada
  - France
  - Germany
  - Japan
  - Netherlands
  - Russia
  - Spain
  - Sweden
  - United Kingdom
  - USA

SEE ALSO:

Configure Managed Checkout for a D2C Store

Let Users Select State, Countries, and Territories from Picklists

Manual Salesforce Tax Solution for a Commerce Store

You can set up taxes for your B2B or D2C store using the manual Salesforce tax solution. The manual tax solution is available only with a custom checkout configuration. Configure tax rates and tax treatments and assign them to the store's tax policy.

What Is the Manual Salesforce Tax Solution?

The manual Salesforce tax solution is a built-in service that calculates taxes for stores that use gross taxation—taxes are included in the product price. The manual Salesforce tax solution supports tax percentage calculations at the country, state, and province level. For most situations, we recommend that you use managed checkout, which includes a native tax solution. The manual solution is appropriate if you have a simple gross tax situation. In any case, consult with a tax expert when setting up taxes for your store.

Show Salesforce Tax Solution Tabs

If you're using a Salesforce org provisioned with Commerce Cloud before the Winter '23 release, make the tax-related entities visible.

Create Geo Countries for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you assign a geo country to a tax rate to specify which country the tax rate applies to. Create a geo country for every country where you want to specify a tax rate. The geo country is the country to which a product is shipped, not from where the order was placed.

Create Geo States for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you assign a geo state to a tax rate to specify which state or province the tax rate applies to. Create a geo state for each state and province that you want to specify a tax rate for. The geo state is the state or province to which a product is shipped, not from where the order was placed.

Select Manual Salesforce Tax Solution and Assign a Tax Policy to a Commerce Store

When you set up the Manual Salesforce Tax Solution, which is available only with custom checkout, you must assign a tax policy to the store.

Configure Tax Rates and Treatments for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you configure tax rates and tax treatments. A tax rate specifies the percentage at which a product is taxed and the country, state, or province where that rate applies. A tax treatment maps the tax rate to products. A tax policy includes all the tax treatments for your store's products.

Set the Default Tax Treatment for a Commerce Store

If a customer purchases a product in your store that isn't included in a tax treatment, the product is taxed at the rate specified by the store's default tax treatment.

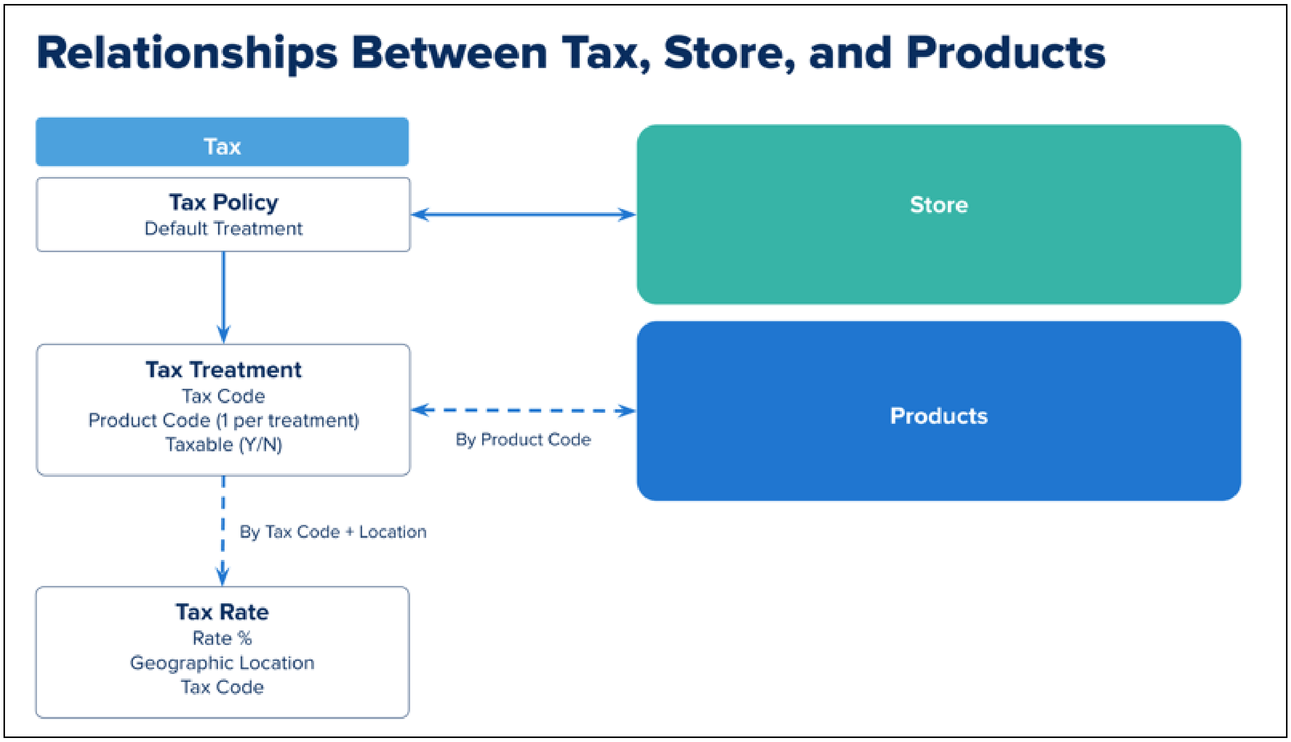
Taxing and Promotion Adjustments in a Commerce Store

Items that are part of a promotion or tier adjustment are taxed after the promotion amount is subtracted from the product price. The tax is calculated on the adjusted amount.

What Is the Manual Salesforce Tax Solution?

The manual Salesforce tax solution is a built-in service that calculates taxes for stores that use gross taxation—taxes are included in the product price. The manual Salesforce tax solution supports tax percentage calculations at the country, state, and province level. For most situations, we recommend that you use managed checkout, which includes a native tax solution. The manual solution is appropriate if you have a simple gross tax situation. In any case, consult with a tax expert when setting up taxes for your store.

A tax rate specifies the percentage at which a product is taxed and the country, state, and province where that rate applies. A tax treatment maps the tax rate to products. A tax policy collects all the tax treatments for a specific store.



For example, you want all adult clothing sold in the United Kingdom (UK) taxed at the full 20% VAT rate. Because children's clothing is exempt from VAT in the UK, you want to tax children's clothing at 0%.

1. Assign all adult clothing to the product code `Adult-Clothing`.
2. Assign all children's clothing to the product code `Child-Clothing`.
3. Configure a tax rate with UK, a 20% rate, and a tax code such as `VAT`.
4. Configure a tax rate with UK, a 0% rate, and a tax code such as `No_Tax`.
5. Create a tax treatment that maps the product code `Adult-Clothing` to the 20% tax rate using the tax code `VAT`.
6. Create another tax treatment that maps the product code `Child-Clothing` to the 0% tax rate using the tax code `No_Tax`.
7. Assign both tax treatments to the tax policy for the store.

When an adult clothing product is shipped to the UK, the 20% tax rate is applied. When a child clothing product is shipped to the UK, the 0% tax rate is applied.

You can configure a default tax treatment for a store. Use the default tax treatment to simplify the configuration. For example, you want all products in a country to be taxed at the same rate.

1. Assign the same product code to all products, for example, `All`.
2. Create a tax rate for each country. Assign all tax rates to the same tax code, for example `All_Tax`, and whatever rate you want to use for the country.
3. Create a tax treatment that uses the same tax code that all the tax rates are assigned.
4. Assign the tax treatment as the default tax policy for the store.

The default tax treatment is applied to all products, with the tax rate determined by the ship-to-country.

Show Salesforce Tax Solution Tabs

If you're using a Salesforce org provisioned with Commerce Cloud before the Winter '23 release, make the tax-related entities visible.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

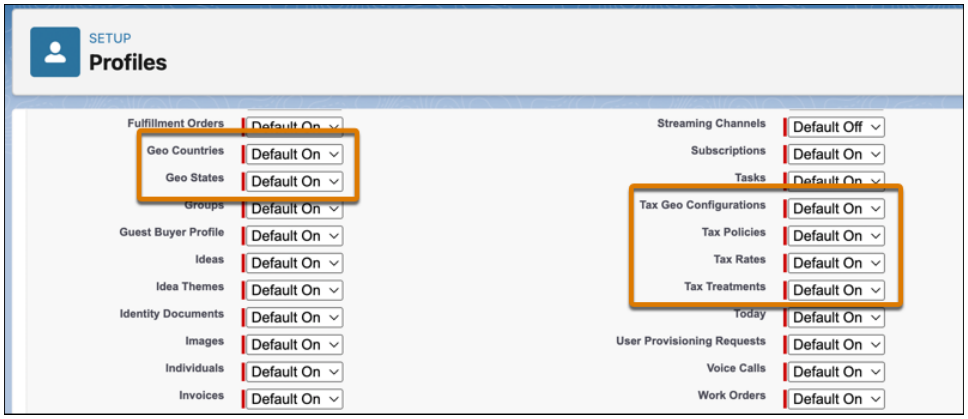
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

A user with Salesforce admin privileges completes these steps.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Users`, and then select **Profiles**.
3. For the user profiles that configure taxes, click **Edit**.
4. Under Tab Settings, from the dropdown menu for Geo Countries, Geo States, Tax Geo Configurations, Tax Policies, Tax Rates, and Tax Treatments, select **Default On**.



Fulfillment Orders	Default On	Streaming Channels	Default Off
Geo Countries	Default On	Subscriptions	Default On
Geo States	Default On	Tasks	Default On
Groups	Default On	Tax Geo Configurations	Default On
Guest Buyer Profile	Default On	Tax Policies	Default On
Ideas	Default On	Tax Rates	Default On
Idea Themes	Default On	Tax Treatments	Default On
Identity Documents	Default On	Today	Default On
Images	Default On	User Provisioning Requests	Default On
Individuals	Default On	Voice Calls	Default On
Invoices	Default On	Work Orders	Default On

5. Save your changes.

Create Geo Countries for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you assign a geo country to a tax rate to specify which country the tax rate applies to. Create a geo country for every country where you want to specify a tax rate. The geo country is the country to which a product is shipped, not from where the order was placed.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

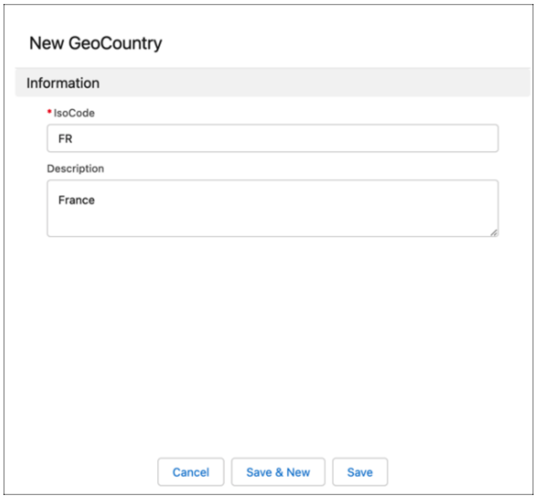
Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before adding a geo state, configure the states, countries, and territories in Setup.

1. From the App Launcher, search for and select **Geo Countries**.
2. Click **New**.
3. Enter the two-letter ISO code for the country. For example, enter FR for France.

For a list of ISO codes, see Standard Countries and Territories for Address Picklists.

4. (Optional) Enter a description, and click **Save**.


New GeoCountry

Information

*IsoCode: FR

Description: France

Create Geo States for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you assign a geo state to a tax rate to specify which state or province the tax rate applies to. Create a geo state for each state and province that you want to specify a tax rate for. The geo state is the state or province to which a product is shipped, not from where the order was placed.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before adding a geo state or geo country, configure the states, countries, and territories in Setup.

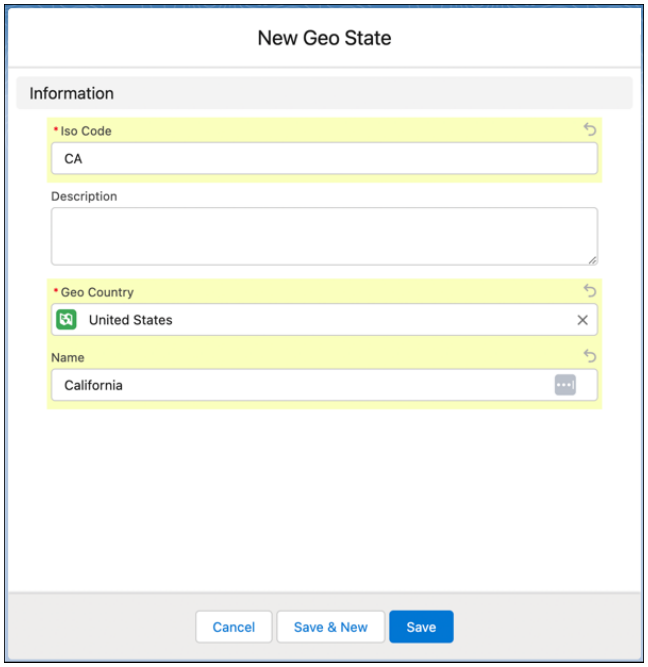
1. From the App Launcher, search for and select **Geo States**.
2. Click **New**.
3. Enter the two-character ISO code for the state or province. For example, enter CA for California.
4. Select the geo country that the state or province is in.
5. Enter a description, and click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce



New Geo State

Information

*Iso Code: CA

Description:

*Geo Country: United States

Name: California

Select Manual Salesforce Tax Solution and Assign a Tax Policy to a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When you set up the Manual Salesforce Tax Solution, which is available only with custom checkout, you must assign a tax policy to the store.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a B2B or a D2C store with custom checkout from the Store dropdown.
2. Select **Settings** > **Checkout**, and go to the Taxes tab.

   The next steps depend on whether the Cart Calculate API is enabled.
3. If the Cart Calculate API is enabled, perform these steps.
   a. Under Providers, for Manual Salesforce Tax Solution, click **Select Provider**, and save your changes.

      If you've already selected Salesforce Tax Solution provider, click **Change Provider** and change your selection to Manual Salesforce Tax Solution.

   b. For Tax Type, click ✎ , and select either Gross or Net.

      You can only select an Automatic tax type if you're using the Salesforce Tax Solution.

   c. For Tax Policy ID, click ✎ , and select a tax policy for the store.
   d. Save your changes.
4. If the Cart Calculate API is disabled, perform these steps.
   a. Under Integration, click ▾ , and then select **Link Integration**.

   b. Select **Standard Tax, Salesforce Service**, and click **Next**.
   c. Confirm your changes.
   d. To use a third-party service, click **Get App from AppExchange**. Download the tax calculation service, and follow the instructions on the AppExchange package.

      Check AppExchange listings carefully. Some packages support only D2C stores, only B2B stores, or both.

   e. Go to the Taxes tab again, and expand **Tax Policy**.
   f. Click ✎ , and select the tax policy for the store.
   g. Save your changes.

Configure tax rates and tax treatments and assign them to the store's tax policy.

SEE ALSO:

Enable and Disable the Cart Calculate API for a Webstore

Configure Tax Rates and Treatments for a Commerce Store

When you configure the manual Salesforce tax solution for a B2B or D2C store, you configure tax rates and tax treatments. A tax rate specifies the percentage at which a product is taxed and the country, state, or province where that rate applies. A tax treatment maps the tax rate to products. A tax policy includes all the tax treatments for your store's products.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. From the App Launcher, search for and select **Tax Rates**.
2. Click **New**.
3. Configure the tax rate fields and save your changes.
   a. Enter a tax code.

      You use the tax code to map products to the tax rate. You can use a tax code supplied by a country, state, or province or create your own.

   b. Enter the geo country or geo state where the rate applies.

      The geo country and geo state is where the item is shipped. See Create Geo Countries for a Commerce Store and Create Geo States for a Commerce Store.

   c. Enter a percentage for the rate.
   d. Enter a priority.

      The priority number determines which tax rate applies first. The lower the number, the higher the priority. If a tax code has both a country and state tax rate associated with it, the priority determines the order in which the tax is calculated. If two tax rates have the same priority, they're added together and applied to the product price. If you don't enter a priority number, the tax rate is evaluated last.

4. From the App Launcher, select **Tax Treatments**.
5. Click **New**.

6. Configure the tax treatment fields and save your changes.
    a. Enter a name for the tax treatment and an optional description.
    b. Set the status to **Active**.
    c. Enter the treatment's product code.
    d. If you have Revenue Cloud Subscription Management and Commerce permissions enabled, select **Yes** for taxable.

       If you have only Commerce permissions, you don't see this field.
    e. Enter the tax code for the tax rates for this treatment.
    f. Set the tax policy to the policy assigned to your store.

Repeat these steps to create tax rates and treatments for all products included in the store's tax policy. Assign a default tax treatment to the store.

Set the Default Tax Treatment for a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

If a customer purchases a product in your store that isn't included in a tax treatment, the product is taxed at the rate specified by the store's default tax treatment.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the App Launcher, find and select **Tax Policies**.
2. Select a policy and then click **Edit**.
3. Set the default tax treatment.

   If the default tax treatment doesn't point to a tax rate for the country where a product is shipped, the tax service returns an error.

Taxing and Promotion Adjustments in a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Items that are part of a promotion or tier adjustment are taxed after the promotion amount is subtracted from the product price. The tax is calculated on the adjusted amount.

To calculate the gross tax, use this formula: `(grossPrice) * taxRate/(1+taxRate)`.

Example: A cart contains three products, but 12 items in total.

- Product1: One item with a unit price of $110. The tax rate is 10%. There's a 20% off promotion for this item.
- Product2: One item with a unit price of $120. The tax rate is 20%. There's a 20% off promotion and a $12 off coupon promotion for this item.
- Product3: Ten items with a regular unit price of $99. The tiered promotion price is $88 each when you order 10 or more. The tax rate is 10%.

The total tax is $102.

- Product1: (110-22)*.10/(1+0.10) = $8 tax
- Product2: (120-24-12)*.20/1+.20) = $14 tax
- Product3: (10*88)*.10/(1+0.10) = $80 tax

Configure Commerce for Salesforce Billing

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B and D2C Commerce

Salesforce Commerce and the Salesforce Billing package work together after some preliminary setup. To ensure successful interoperability, make sure that your product records contain values for fields required by Salesforce Billing. Also make sure that your admin correctly sets field-level permissions for the Buyer profile.

Salesforce Billing requires values for the following fields in your product records: Billing Rule, Charge Type, Revenue Recognition Rule, and Tax Rule. After your product records are populated with the required field values, you can set field-level permissions for the Buyer profile. You set field-level permissions for both the Product and Order Product objects.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. From Object Manager, grant edit access to the Buyer profile for these Product fields: Billing Frequency, Billing Rule, Billing Type, Charge Type, Revenue Recognition Rule, and Tax Rule.
    a. From Object Manager, find and select **Product**, and then click **Fields & Relationships**.
    b. For each of the preceding fields, click the field name, click **Set Field-Level Security**.
    c. Grant edit access for the Buyer profile, and click **Save**.
    If you select the **Visible** checkbox only, the Buyer profile has edit access to the field.
3. Grant edit access to the Buyer profile for the following Order Product fields: Billing Treatment, Charge Type, Legal Entity, and Tax Treatment.
    a. From Object Manager, find and select **Order Product**, and then click **Fields & Relationships**.
    b. For each of the preceding fields, click the field name, and click **Set Field-Level Security**.
    c. Grant edit access for the Buyer profile, and click **Save**.
    If you select the **Visible** checkbox only, the Buyer profile has edit access to the field.
4. Grant to the Buyer profile read-only access to these Order Product fields: Invoice Run Processing Status, Invoice Run Status (Index), Order Product Bookings, Revenue Allocation Amount, Revenue Expected Amount, Revenue Liability Amount, Revenue Recognition Rule, Revised Order Product, and Tax Rule.
    a. From Object Manager, find and select **Order Product**, and then click **Fields & Relationships**.
    b. For each of the preceding fields, click the field name, and click **Set Field-Level Security**.
    c. Grant read-only access for the Buyer profile, and click **Save**.
    If you select both the **Visible** and the **Read-Only** checkboxes, the Buyer profile has read-only access to the field.

SEE ALSO:

Manage Your Billing Processes with Salesforce Billing

Resolving Asynchronous Order Failures in a Commerce Store

D2C or B2B stores created with the LWR template in Spring '23 or later process orders asynchronously. Asynchronous order processing improves store performance and responsiveness. However, when an order is processed asynchronously, the store can sometimes generate failed orders (PlaceOrderFailed exceptions). To handle these exceptions, you give the Commerce admin access to the Process Exception object and activate the Retrigger Place Order flow.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Modify Sharing Settings to Resolve Failed Orders for Commerce Stores

To let a Commerce admin resolve process exceptions for failed orders (PlaceOrderFailed), modify the sharing settings for the Process Exception object.

Retrigger Failed Orders in a Commerce Store with an Automatic Flow

When an order fails (PlaceOrderFailed), a process exception record is created. As a Commerce admin, you can view the record to investigate the cause and fix it. After the record's status is changed to Resolved, you can use the Retrigger Place Order flow to place the order gain.

Resolve Asynchronous Order Failures for Your Commerce Store

When an asynchronous order fails with a PlaceOrderFailed exception, the exception is converted into a process exception record. You can then view the record and investigate the cause of the error. After you fix the problem and change the record's status to Resolved, the Retrigger Place Order flow resubmits the order.

Modify Sharing Settings to Resolve Failed Orders for Commerce Stores

To let a Commerce admin resolve process exceptions for failed orders (PlaceOrderFailed), modify the sharing settings for the Process Exception object.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

These steps assume that you've already defined a role for the Commerce admin.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, find, and select **Sharing Settings**.
3. Configure the organization-wide sharing settings.
   - a. In the Organization-Wide Defaults section, click **Edit**.
   - b. For the Process Exception object, set the default internal access to **Public Read/Write**, and set the default external access to **Private**.
   - c. Click **Save**.
4. Define a sharing rule for the Process Exception object.
   - a. In the Process Exception Sharing Rules section, click **New**.
   - b. Enter a name for the rule.
   - c. For rule type, select **Based on record owner**.
   - d. For records to be shared, select **Public Groups** and **All Customer Portal Users**.
   - e. For users to share, select **Roles** and select the role that you created for the Commerce admin.

   f. For access level, select **Read/Write**.
   g. Click **Save**.

SEE ALSO:

Modify Sharing Settings to Resolve Failed Orders for Commerce Stores

Retrigger Failed Orders in a Commerce Store with an Automatic Flow

When an order fails (PlaceOrderFailed), a process exception record is created. As a Commerce admin, you can view the record to investigate the cause and fix it. After the record's status is changed to Resolved, you can use the Retrigger Place Order flow to place the order gain.

Before deploying the Retrigger Place Order flow, configure sharing settings for the Commerce admin.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. If your store was created using `sfdx` after the Summer '23 release, go to step 3 to activate the preinstalled Retrigger Place Order flow.
2. If your store was created before Summer '23, deploy the flow.
   a. In your browser, go to `https://github.com/forcedotcom/commerce-on-lightning`.
   b. If you haven't already, clone the commerce-on-lightning repo.
   c. Check out the main branch.
   d. Open a command prompt and navigate to the `commerce-on-lightning/examples/b2b/checkout/retrigger-place-order` directory.
   e. Deploy the flow using SFDX.

```
sfdx force:mdapi:deploy -d <path-to-this-directory> -w -1
```

3. Activate the flow.
   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, find, and select **Flows**.
   c. Click **Retrigger Place Order**.
   d. Click **Activate**.

SEE ALSO:

Modify Sharing Settings to Resolve Failed Orders for Commerce Stores

Resolve Asynchronous Order Failures for Your Commerce Store

When an asynchronous order fails with a PlaceOrderFailed exception, the exception is converted into a process exception record. You can then view the record and investigate the cause of the error. After you fix the problem and change the record's status to Resolved, the Retrigger Place Order flow resubmits the order.

> Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before you complete these steps, configure sharing settings for the Commerce admin to activate the Retrigger Place Order flow.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Orders**.
3. Click an order summary, and navigate to the Related tab.
4. In the Process Exceptions section, if a process exception status is new and the type is PlaceOrderFailed, open the exception.
5. Investigate and, if possible, fix the problem that caused the failure.
6. After the problem is fixed, change the exception record's status to Resolved.
   Changing the record's status to Resolved causes the Retrigger Place Order flow to place the order again.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Modify Sharing Settings to Resolve Failed Orders for Commerce Stores

Preparing for High Scale Order Processing in Commerce

Starting in Summer '24, the High Scale Orders feature is enabled by default during checkout for new B2B and B2C stores created with the LWR template. However, some initial setup is needed to ensure that the High Scale Orders feature is fully enabled. In addition, developers must understand how this feature can affect their Apex code. The High Scale Orders feature isn't supported for B2B Aura stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Enable High Scale Orders in Commerce

Starting in Summer '24, if you use the Commerce Setup Assistant to set up a new B2B or D2C store created with the LWR template, the High Scale Order feature is enabled by default. For existing stores, you can manually enable the feature. If your org has existing orders, the High Scale Order feature is not enabled by default, and you can manually enable the feature.

Create a Person Account Duplicate Rule for High Scale Orders in Commerce

Starting in Summer '24, the High Scale Orders feature requires a Person Account duplicate rule for guest users. This duplicate rule is required for B2B and D2C stores created with the LWR template. When a guest user places an order, the rule determines whether a Person Account record exists for the guest user. If a matching record exists, the system uses the record. Otherwise, the system creates a record for the guest user. If you don't create a Person Account duplicate rule, the system creates a Person Account record for every order by every guest user, potentially resulting in a large number of duplicate records.

Developer Considerations for High Scale Orders in Commerce

If you extended the Commerce_Domain_Checkout_CreateOrder extension point before Summer '24, it's possible that your Apex code doesn't work correctly with the High Scale Orders feature enabled. You must test your existing code to make sure that it works as expected, modifying it as needed. Also, consider how the High Scale Orders feature in general can affect your Apex code.

Enable High Scale Orders in Commerce

Starting in Summer '24, if you use the Commerce Setup Assistant to set up a new B2B or D2C store created with the LWR template, the High Scale Order feature is enabled by default. For existing stores, you can manually enable the feature. If your org has existing orders, the High Scale Order feature is not enabled by default, and you can manually enable the feature.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To manually enable the High Scale Order feature, complete these steps.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, find and select **Order Settings**.
3. Click the toggle for **Enable Orders** and the toggle for **Enable Enhanced Commerce Orders**, and click **Save**.

   If the **Enable Orders** and **Enable Enhanced Commerce Orders** toggles are already enabled, you can leave them enabled.
4. From Setup, in the Quick Find box, enter `Order`, and then select **Order Management** > **Setup**.
5. Activate the toggle for **High Scale Orders**.

Create a Person Account Duplicate Rule for High Scale Orders in Commerce

Starting in Summer '24, the High Scale Orders feature requires a Person Account duplicate rule for guest users. This duplicate rule is required for B2B and D2C stores created with the LWR template. When a guest user places an order, the rule determines whether a Person Account record exists for the guest user. If a matching record exists, the system uses the record. Otherwise, the system creates a record for the guest user. If you don't create a Person Account duplicate rule, the system creates a Person Account record for every order by every guest user, potentially resulting in a large number of duplicate records.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Before Summer '24, B2B and D2C stores created with the LWR template used an implicit duplicate rule that checked the values of these four Person Account fields.

- First Name
- Last Name
- Phone
- Email

This implicit rule considered a record a duplicate if all four fields were an exact match with an existing record. Otherwise, the system created a record.

To replicate this behavior, create a Person Account duplicate rule that specifies, at a minimum, the same four fields with the same matching criteria.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, find and select **Duplicate Rules**.
3. Click **New Rule**, and then select **Person Account**.
4. Specify a rule name, desired actions, and optional conditions.
5. For the Matching Rule, select **--Create New Matching Rule--**.

   The system displays a message prompting you to save your duplicate rule and redirecting you to create a matching rule.
6. Click **Save Duplicate Rule**.

   The system displays a partially completed matching rule, which is associated with the duplicate rule that you saved.
7. Specify matching criteria for the First Name, Last Name, Email, and Phone fields, with the Exact matching method specified for all four fields.

   You can optionally specify additional fields and different matching methods for the additional fields.
8. Click **Save**.

   The system displays details for the matching rule that you created.
9. Click **Activate**.
10. From Setup, in the Quick Find box, enter `Duplicate Rules`, and then select **Duplicate Rules**.
11. Click the duplicate rule that you created.
12. Click **Activate**.

Developer Considerations for High Scale Orders in Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

If you extended the Commerce_Domain_Checkout_CreateOrder extension point before Summer '24, it's possible that your Apex code doesn't work correctly with the High Scale Orders feature enabled. You must test your existing code to make sure that it works as expected, modifying it as needed. Also, consider how the High Scale Orders feature in general can affect your Apex code.

The High Scale Orders feature can affect your Apex code in these ways.

- The High Scale Orders feature creates OrderSummary objects and uses those objects to create corresponding Order objects. Only fields present in the OrderSummary objects can be reflected to the corresponding Order objects. Some Order fields aren't available as OrderSummary fields. For example, the ShippingAddress field. Therefore, the resulting Order objects created by the High Scale Orders feature don't reflect values for the ShippingAddress field. If you're extending the `Commerce_Domain_Checkout_CreateOrder` extension point, your Apex code must only manipulate Order fields that are available in both the Order and the OrderSummary objects.
- If you're extending the `Commerce_Domain_Checkout_CreateOrder` extension point, you can manipulate custom fields on Order and OrderSummary objects. Make sure that your Apex code only manipulates custom fields that are the same for both objects. For example, same names and data types.
- When the High Scale Orders feature creates OrderSummary objects, it sets their status to Created.
- When the High Scale Orders feature creates Order objects, it sets their status to Activated, and the status can't be changed.
- The High Scale Orders feature creates Order objects and OrderSummary objects in the Automated Process user context. If the High Scale Orders feature is disabled, Order object and OrderSummary objects are created using the current shopper's context.
- When triggering flows on the OrderSummaryCreatedEvent, the system always uses the Automated Process user context.

- When triggering flows on Order creation events, the system uses the Automated Process user context if the High Scale Orders feature is enabled. Otherwise, the system uses the current shopper's context.

Enable Split Shipping for Commerce Stores

Let customers ship items in one order to multiple locations. At checkout, customers can split a single cart into multiple shipments. Customers can specify a shipping method and destination for up to 10 shipments per order. You can't use split shipping with managed checkout or with digital or subscription products.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

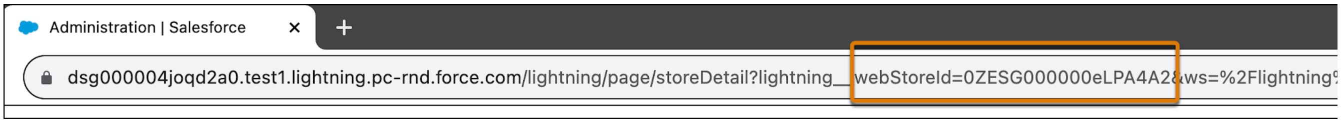
1. Enable split shipping.
    1. At the top of the page, click ⚙ and select **Developer Console**.
    2. From Debug, click **Open Execute Anonymous Window**.

       An Apex editor window opens.
    3. Copy this code snippet into the Apex editor window.

```
ID storeId = '0ZExx0000000000000'; // !! REPLACE WITH YOUR STORE ID !!

WebStore store = [ select id, OptionsSplitShipmentEnabled FROM WebStore WHERE id =
:storeId LIMIT 1];
store.OptionsSplitShipmentEnabled = true;
update store;
```

    4. Replace the store ID with your 18-character ID.

       You can find your ID in your store's home page URL. It begins with "webStoreId=".



Administration | Salesforce

dsg000004joqd2a0.test1.lightning.pc-rnd.force.com/lightning/page/storeDetail?lightning__webStoreId=0ZESG000000eLPA4A2&ws=%2Flightning

    5. Execute the code, and return to your store's home page.

2. If your store was created before the Spring '24 release, update your store's shipping integration Apex class.

   Before implementing this change, consult with your developer so that you don't overwrite custom modifications made to this class.
    1. At the top of the page, click ⚙ and select **Setup**.
    2. In the Quick Find box, enter `Apex Classes`, and then select **Apex Classes**.
    3. Find the B2CDeliverySample class, and click **Edit**.
    4. From GitHub, copy the code from the B2CDeliverySample.cls code block.

       https://github.com/forcedotcom/commerce-on-lightning/blob/develop/examples/b2c/checkout/integrations/classes/B2CDeliverySample.cls
    5. Paste the code into your org's B2CDeliverySample Apex Class window.
    6. Save your changes.

3. If you have an Aura store created before the Spring '24 release and the Cart Calculate API is disabled, update your store's price check integration to use standard pricing.
    a. In the navigation sidebar, select a store from the Store dropdown.
    b. Select **Settings** > **Store**.
    c. To choose a custom pricing provider, on the Price Check tab, click **Link Integration** and select **Standard Pricing**. To unlink an existing provider, click ▾ and select **Unlink**.
    d. Save your changes.

To increase the delivery group limit for your Salesforce org, contact your Salesforce administrator.

SEE ALSO:

Customize Split Shipping for Commerce Stores

Design Your Checkout Page in a Commerce Store

Define Apex Classes

Configure Split Order Fulfillment

When a customer chooses to send products in one order to different addresses, you can fulfill the order from multiple locations. The Split Order Fulfillment flows create a fulfillment order for each address. You can also manually split fulfillment for an order.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Enable Split Shipping, and set up multiple delivery groups. See Enable Split Shipping for Commerce Stores on page 152.
2. In your browser, go to the commerce-on-lightning repo.
3. Follow the steps in the repo to deploy and activate the flows.
    - Create OrderSummaryRoutingSchedule on OrderSummary event—This flow is triggered when a customer places an order and generates an order summary. It creates an Order Summary Routing Schedule record that includes the order summary ID, a status of Scheduled, and the scheduled date and time set to Current Date/Time. The flow then triggers the Create Fulfillment Orders on OrderSummaryRoutingSchedule flow.
    - Create Fulfillment Orders on OrderSummaryRoutingSchedule—This flow is triggered by the Create OrderSummaryRoutingSchedule on OrderSummary event flow. A user can also manually trigger this flow by creating an Order Summary Routing Schedule record with a Scheduled status. It triggers the Create FulFillment Orders from Order Summary Subflow.
    - Create Fulfillment Orders from Order Summary Subflow—This flow is triggered by the CreateFulfillment Orders on OrderSummaryRoutingSchedule flow. It creates corresponding FulfilmentOrder, FulfillmentOrderLineItem, FulfillmentOrderItemAdjustment, FulfillmentOrderItemTax records for each delivery group in the order.

Enable Large Cart Support for a Commerce Store

Most stores limit cart size to 500 line items per order. However, if your B2B or D2C store requires a higher limit, you can enable support to process up to 2,000 line items per order. To increase your line item limit, contact Customer Support.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Enable Promotion Support

Make sure to enable promotion support for large carts. Otherwise, promotions aren't evaluated for carts with a total quantity of more than 10,000. To request promotion support for large carts, contact your Salesforce Administrator.

Understand Changes to Promotion Functionality

After you enable promotion support for large carts, promotions ignore quantity limits on discounts, which can impact certain promotion scenarios. Here are some examples.

- Total Fixed Price discounts–When you create a Total Fixed Price discount, you set a quantity limit to offer a select number of items for a specific reduced rate. For example, you offer three shirts for $50. Because the promotion evaluator ignores quantity limits for large carts, Total Fixed Price promotions sometimes result in either no discount or a larger discount than expected. If you enable promotion support for large carts, we recommend not using Total Fixed Price discounts.
- Percent Off, Fixed Amount Off Unit, and Fixed Price discounts–Quantity limits are ignored, so discounts apply to all items that meet the conditions. For example, you offer a 10% discount on an item priced at $10, but limit the quantity to one. If a customer adds a quantity of 10 for this item, the result is a $10 discount.
- Buy 1, Get 1–Because quantity is ignored on a line item, a line item counts as only one qualifying item. Therefore, two items with the same SKU don't qualify for a "Buy 1, Get 1" promotion. Instead, consider creating promotions for "Buy X, Get Y."

Account Creation for Guest Checkout in B2B Stores

If your B2B store allows guests to purchase products, you can configure whether to create a person or business account for the guest upon checkout. As of Winter '25, person accounts don't need to be enabled for B2B store guest checkout.

Whether B2B store guest checkout creates a person or business account depends upon your checkout configuration and if it supports self-registration.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

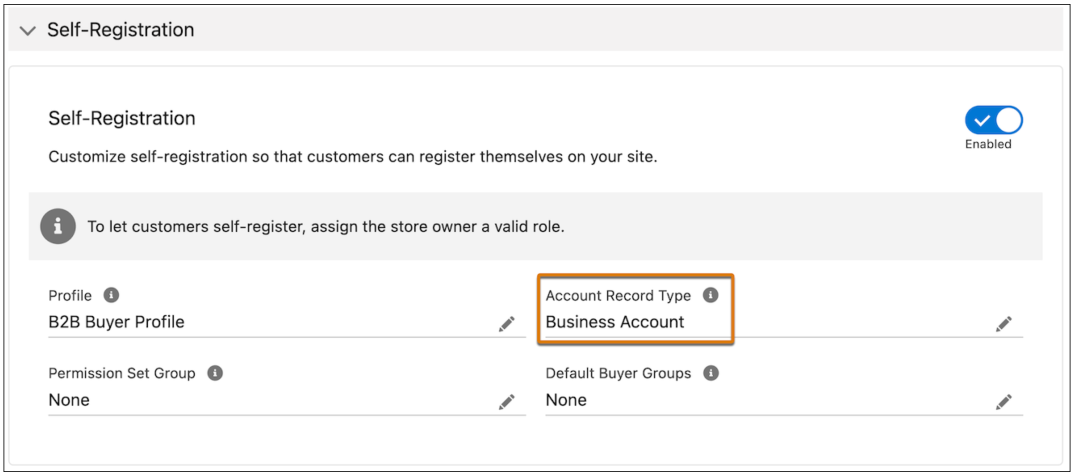
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Self-registration supported

If your store allows self-registration, you can specify which account type to create upon registration. See Allow Self-Registration and Guest Access to the Pay Now Site.

- **Business account creation**: When the account record type for self-registration is set to Business Account.
- **Person account creation**: When the account record type for self-registration is set to Person Account.



Self-Registration

Customize self-registration so that customers can register themselves on your site.

To let customers self-register, assign the store owner a valid role.

Profile: B2B Buyer Profile

Account Record Type: Business Account

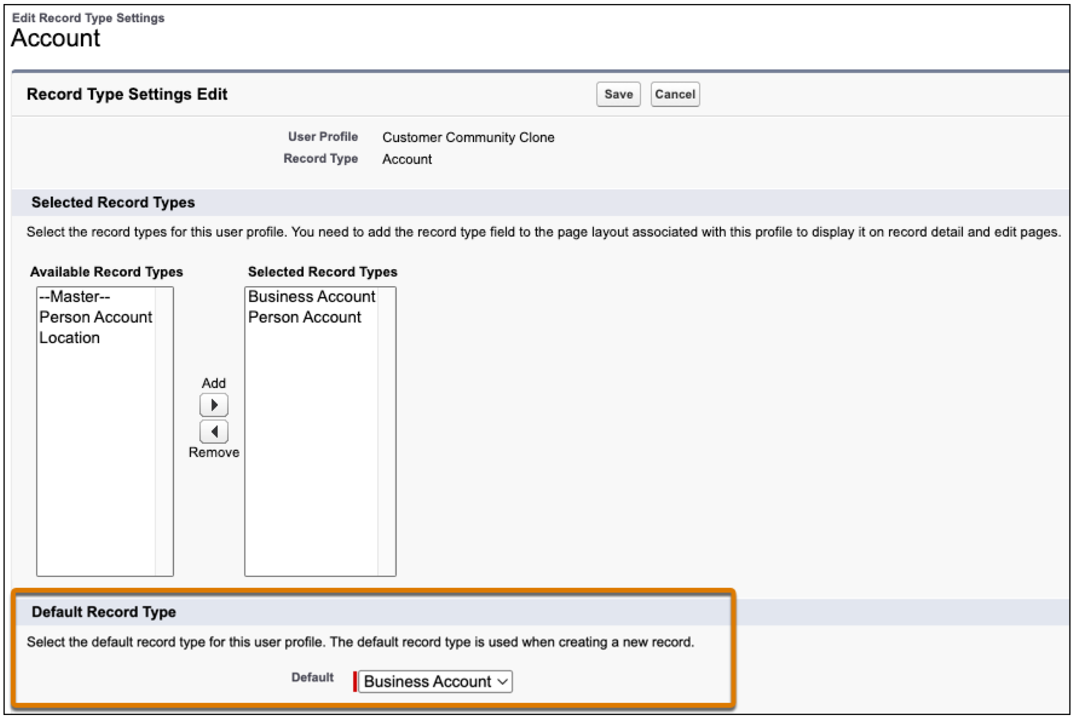
Permission Set Group: None

Default Buyer Groups: None

Self-registration not supported

If your store doesn't allow self-registration, you can specify which account type to create by setting the guest buyer profile's account record type defaults. See Assign Record Types and Page Layouts in Profiles. If you don't specify an account type in the guest buyer profile, the account created depends upon whether your store supports person accounts.

- **Business account creation**: When either the guest buyer profile has a business account, or the store doesn't have person accounts enabled.
- **Person account creation**: When the guest buyer profile doesn't have a business account and the store has person accounts enabled.



User Profile: Customer Community Clone

Record Type: Account

Selected Record Types

Select the record types for this user profile. You need to add the record type field to the page layout associated with this profile to display it on record detail and edit pages.

Available Record Types	Selected Record Types
--Master-- Person Account Location	Business Account Person Account

Default Record Type

Select the default record type for this user profile. The default record type is used when creating a new record.

Default: Business Account

Considerations for high-scale orders

If your store has high-scale orders enabled, you can use duplicate rules to handle any potential duplication of accounts. A duplicate rule defines whether to create a record or update an existing record. Salesforce provides standard duplicate rules for business and person accounts, contacts, and leads. You can also create custom duplicate rules. Any active duplicate rules in your org are considered during the guest checkout account creation process.

SEE ALSO:

- Enable Guest Access to a Store
- Enable Person Accounts for Commerce
- Customize Duplicate Rules
- Deduplication for High Scale Orders

Improve Page Performance Using Add-to-Cart in a Commerce Store

To speed up the shopping experience in your LWR store, turn on the Faster Add-to-Cart feature. By splitting processing time across Product and Cart pages, Faster Add-to-Cart improves the response time on a Product page when a customer adds an item to their cart. If your store was created in Winter '24 or later, this setting is enabled by default.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

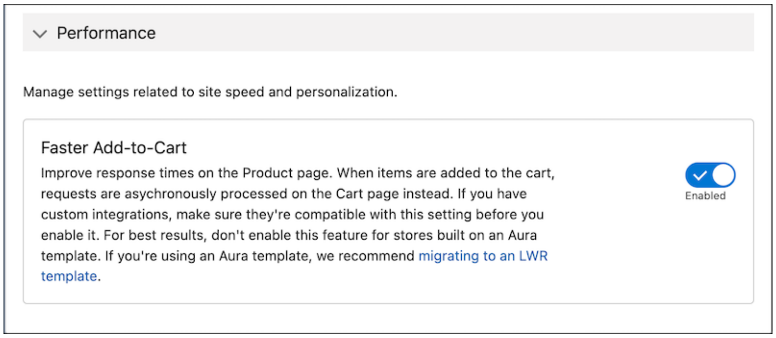
Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. If you have custom components that use cart APIs, make sure that they don't rely on an add-to-cart response when returning cart item IDs, cart item prices, or promotions. If they do, change the components before enabling Faster Add-to-Cart.

   When Faster Add-to-Cart is enabled, the Cart Badge shows only the total number of items in a cart and not the total number of unique products.

2. In the navigation sidebar, select a store from the Store dropdown.
3. Click **Store Settings**.
4. On the General Settings tab, in the Performance section, enable Faster Add-to-Cart.



Manage settings related to site speed and personalization.

Faster Add-to-Cart

Improve response times on the Product page. When items are added to the cart, requests are asychronously processed on the Cart page instead. If you have custom integrations, make sure they're compatible with this setting before you enable it. For best results, don't enable this feature for stores built on an Aura template. If you're using an Aura template, we recommend migrating to an LWR template.

Enabled

5. To apply the changes, republish your store.

SEE ALSO:

- Design the Cart Page in a Commerce Store

Enable Duplicate Cart Items for a Commerce Store

Let customers add duplicate cart items to their carts, instead of increasing the quantity of a single cart item.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Enable duplicate cart items.
   a. Click ⚙ at the top of the page, and then select **Developer Console**.
   b. From Debug, click **Open Execute Anonymous Window**.

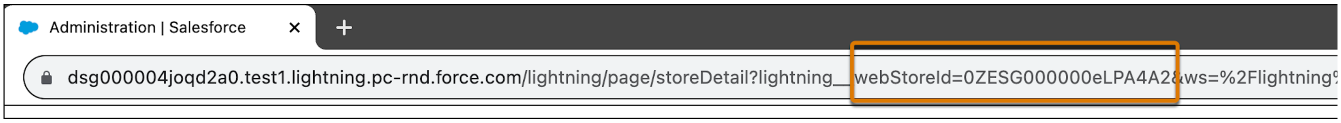
      An Apex editor window opens.

   c. Copy this code snippet into the Apex editor window.

```
ID storeId = '0ZExx0000000000000'; // !! REPLACE WITH YOUR STORE ID !!

WebStore store = [ select id, OptionsDuplicateCartItemsEnabled FROM WebStore WHERE
id = :storeId LIMIT 1];
store.OptionsDuplicateCartItemsEnabled = true;
update store;
```

   d. Replace the store ID with your 18-character ID.

      You can find your ID in your store's home page URL. It begins with "webStoreId=".


Administration | Salesforce
dsg000004joqd2a0.test1.lightning.pc-rnd.force.com/lightning/page/storeDetail?lightning__webStoreId=0ZESG000000eLPA4A2&ws=%2Flightning

   e. Execute the code, and return to your store's home page.

Store Search

Get the most out of your store by helping shoppers find what they're looking for.

Considerations for Product Searchability

As you configure search for your storefront, keep these considerations in mind.

Controlling Search, Facet, and Display Behavior for Fields

Standard fields and custom field types have characteristics that affect whether you can control the behavior of search, facet, and display.

Mark Products as Searchable or Not Searchable

After you create your initial search index, all products in the catalog are searchable by default. If you want to make a product not searchable, you can exclude it from search. You can change whether a product is searchable at any time.

Mark Product Fields as Searchable

Product fields are consistent from product to product. For example, each product has a field for Product Name, Product Description, and Product Image. By default, some product fields are marked as searchable.

Configure Product Search Filters for a Commerce Store

Filters improve the shopping experience by letting customers narrow their search results. You can create filters from product fields, such as size, finish, and color. A filter can also include selectable values. For example, a color filter can have the values red, blue, and green. If a filter has values, they appear on the results page under the parent filter.

Configure How to Display Search Results

Define how many values appear for each search filter and how many search results to show on a page. You can choose to skip additional entitlement checks, automatically select and display relevant facets, and group search results under parent products.

Sort Options

Add and modify sort rules to let customers arrange results in search and category pages. You can create rules from available products and product attributes and define how these rules appear to customers.

Commerce Search Index

The search index makes products in your store searchable. Rebuild the search index after making updates to your store so that the changes are reflected for your customers.

Manage No Search Results

Manage how buyers are redirected or alerted when their search yields no results. If you have a B2B or D2C store that uses the LWR template, use the No Results Layout component to display a no results message.

Considerations for Product Searchability

As you configure search for your storefront, keep these considerations in mind.

Before You Begin

Other features in your store and in your Salesforce org can affect whether a product is discoverable.

Commerce Administrator Considerations for Product Searchability

Commerce administrators must ensure that certain conditions are met to search for products in storefronts.

Commerce Search and Auto-Correction Management

Auto-correction, or typo tolerance, helps customers find the products that they're looking for when they inadvertently enter incorrect search terms. Typo tolerance corrects suggestions by matching and returning terms similar to the terms entered in a query. For example, if a customer mistypes shert in the search bar of a site that sells apparel, typo tolerance can suggest terms like shirt.

Before You Begin

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Other features in your store and in your Salesforce org can affect whether a product is discoverable.

As part of the import process, or after the import is complete, make sure these conditions are met.

- All products in your store are associated with a category.
- All categories are associated with the store catalog.
- The catalog is associated with the store.

Important: If a shopper searches for a product that isn't in the store's catalog, the search returns an empty page.

Also review the requirements in this table.

Requirement	More Information

Confirm that your products are marked searchable and active.	Mark Products as Searchable on page 167
To match search terms with searchable fields, mark product fields as searchable.	Mark Product Fields as Searchable on page 168
Ensure that shoppers have CRUD read access to products and to the catalog.	Create Permission Sets for Shoppers on page 11
Check Field-Level Security (FLS) restrictions on searchable or filterable product fields to ensure no shopper limitations.	Field-Level Security
Update your search index to include the latest catalog updates.	Update the Commerce Search Index on page 177

SEE ALSO:

Commerce Administrator Considerations for Product Searchability

Commerce Administrator Considerations for Product Searchability

Commerce administrators must ensure that certain conditions are met to search for products in storefronts.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

To search for a product in B2B or D2C stores, buyers and shoppers must have:

- CRUD read access to the product and catalog
- Entitlement to view the product
- Field-level security (FLS) access to all product fields that are configured for search

  Important: To ensure buyers and shoppers can view search results, don't use FLS restrictions on indexed product or catalog fields.

  Use FLS to control access to the information in object fields through profiles, permission sets, or from the field itself. Product fields respect your Salesforce FLS settings, which affect whether a product or the information in a product field is discoverable. Using FLS to restrict a shopper's access to a field that's searchable or filterable prevents that shopper from conducting a search.

  For more information, see Field-Level Security.
- Access to all indexed fields

  Regardless if one or many product fields are indexed, if a shopper can't access one indexed field, the shopper can't search your store.

Search returns results only for a full token match—when all search terms are present in a result. Partial token matching, like prefix and infix searches, isn't enabled. But stemming is enabled. So search results list all matches to a word's stem—for example, "coffee" finds coffees, and "run" returns runner, running, and so on.

Search Considerations for Product Entitlements in B2B Stores

In Experience Builder, many components are available to you for building your store. The components that were developed specifically for B2B Commerce store environments respect user entitlements. When buyers view products through a component, such as Results Layout, they see only those products that they're entitled to see.

For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce Customer Support to enable this functionality. If a category has no entitled products, it also doesn't appear in the storefront. To view a category or its descendent categories, it must have entitlement to at least one product within the category. Update your search index for any category changes to take effect. The Account Selector option isn't available with this feature.

Some components don't respect entitlements, so use caution when introducing them to your store. For example, be cautious with the CMS Collections component. All users can see any product that you expose through this component, whether the user is a guest, entitled, or unentitled. The same is true for a Product Record List. For the Record List component, we advise not using it in your store.

Another component to be cautious of is Global Search. When you configure the types of results it can return, don't include Products objects. However, the Results Layout component respects user entitlements, so use it for product searches. For searches for things like cases, articles, and feeds, you can use Global Search.

Search Results Limits

To achieve the highest performance, the Commerce Search engine limits search results returned and displayed to the most relevant 10,000 products for each search query, even if there are more results. For example, if a query matches 20,000 results, Commerce Search will still show 10,000 results. When a customer modifies existing search results using sorting options or filters, Commerce Search uses the updated criteria to search all products again before showing the new results.

In addition, for pages using the Results Layout component, Commerce Search shows only up to 5,000 additional results after the first results page, even if there are more results. For example, say you set the results per page to 20, and a search request results in 10,000 products. Commerce Search orders the results based on sort settings and displays the first page of 20 results. It then provides 250 additional pages of 20 products each for a total of 5,020 viewable results. By comparison, if you set the results per page to the maximum setting of 200, the first page shows 200 results. Commerce Search then provides 25 more pages of 200 products each for a total of 5,200 viewable results.

Commerce Search shows the most relevant results for any sort or filter settings. To view more results, customers can use sorting options to reorder output or use filter values to refine their search.

Search Results Count Approximation

To improve search performance on queries with a large number of results, displayed product and facet counts are approximated. When a search reaches this high threshold of results, computing the exact value slows performance and customers generally only need an approximation. To keep results counts lower, consider modifying catalog size, category structure, and filterable attribute value distribution.

Search Considerations for Promotions in B2B Stores

Promotion tier pricing isn't reflected in prices on the Search Results page. However, promotional pricing is reflected on other pages, such as the Product Details and Cart pages.

Note: Promotions aren't currently supported for D2C stores.

Troubleshoot Translation and Localization Issues in B2B Stores

Note: Translation and localization aren't currently supported for D2C stores.

Issue	Resolution
Stemming isn't working as expected. For example, different results appear when searching for "glove," "gloves," and "glove's."	Go to **Setup** > **Company Information** and enable Data Translations.
Searching in a different language doesn't yield results.	Add the org default language as a supported language in your store. For example, if your org default language isn't English, add

Issue	Resolution
	English as a supported language in your store (and provide English translations of product field values). To see the results, search your store as a user in the org default language.
After marking fields as filterable and updating the search index, the filters don't appear in the store.	Go to **Setup** > **Company Information** and enable Data Translations.
After adding a language and setting the user's language to it, an error occurs when navigating to a category.	Update the Commerce search index on page 177 when you add new languages or translations to your store or product catalog.
Picklist values don't appear in the search results after creating a store in a different language than the org.	Make sure to provide translated values to your picklist if your store uses a different language than the default language of your org.

SEE ALSO:

Before You Begin

Commerce Search and Auto-Correction Management

Auto-correction, or typo tolerance, helps customers find the products that they're looking for when they inadvertently enter incorrect search terms. Typo tolerance corrects suggestions by matching and returning terms similar to the terms entered in a query. For example, if a customer mistypes shert in the search bar of a site that sells apparel, typo tolerance can suggest terms like shirt.

Typo correction is enabled by default for Commerce Search, but it's executed as a secondary search function. The secondary search updates the search phrase to include candidate corrections and then repeats the search. You can't disable typo tolerance.

When a customer initiates a search:

- The initial filter and search phrase execution occur simultaneously, and then Commerce Search determines if the term exists in the catalog.
- If Commerce Search finds the original search term, it returns the results.
- If no results are found for a search term, Commerce Search internally initiates a typo correction search and finds the closest match to the original term in the catalog.
- Using the corrected term, Commerce Search runs the search again and returns any results.
- If a user begins a query with sku: or SKU: and includes one or more SKUs, Commerce Search returns results matched by the SKU field and Product Code. If the inputs are separated by white space, multiple SKU search is supported. Typo tolerance isn't used when a user enters a SKU search.

Keep these considerations in mind for Commerce Search, typo tolerance, auto-correction, and Einstein Search suggestions.

- Partial term matching, such as prefix search, isn't supported.
- Stemming is supported. Commerce Search delivers results for any matches to a word's stem, for example, coffees finds coffee and running returns run.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- Commerce Search provides typo tolerance and auto-correction only when it finds terms that differ by one or two letters or numbers from the original term. For example, searching for coff results in the corrected term coffee. But searching for cof provides no results because it takes more than two letter corrections to reach coffee.
- Typo tolerance looks for the closest match within two corrections of the original term that returns results.
- Typo tolerance applies to tokens with three or more characters. For example, if a customer query for XY-1234 doesn't return an exact match, typo tolerance searches for the closest match to the second token, 1234, but not the first, XY.
- Typo tolerance looks for replacement terms before filters or entitlements are applied. Typo tolerance thus doesn't guarantee a specific replacement for a misspelled or not found term, even when candidate terms are within the two correction distance.
- Search uses the exact one or two correction distance from the original term only when looking for corrections in non-localized terms.
- When searching localized terms, the original term is first analyzed using regular search functions. Depending on the localization language, analysis can include stemming searched terms and potential corrections, resulting in terms of shorter length.
- If a localized, misspelled term can't be properly stemmed, the distance between the term and the stem of its corrected spelling can be greater than two corrections. This scenario can result in some longer misspelled words not getting corrected.
- Einstein Search suggestion uses different algorithms from Commerce Search typo tolerance or auto-correction. Einstein Search suggests type-ahead options only after the site builds up enough search history to use as a reference input.

SEE ALSO:

Considerations for Product Searchability

Controlling Search, Facet, and Display Behavior for Fields

Standard fields and custom field types have characteristics that affect whether you can control the behavior of search, facet, and display.

How Behaviors Are Controlled

Products in your store are based on a data object named Product2. This object serves as a template for all store products. You use the Product2 object to control search, facet, and display behavior.

Product and Product Category Standard Fields

Standard fields have characteristics that affect whether you can control a field's searchable, facetable, displayable, and sortable behavior.

Product Custom Fields

Custom fields have characteristics that affect whether you can control the field's searchable, facetable, displayable, and sortable behavior.

Modify or Remove Custom Fields

To ensure that Search works properly, make sure to mark the field as unsearchable before changing its name or removing it.

How Behaviors Are Controlled

Products in your store are based on a data object named Product2. This object serves as a template for all store products. You use the Product2 object to control search, facet, and display behavior.

All Product2 fields are available to all products in your store. If you add custom fields to the Product2 object, those fields are also available to all store products.

The behavior you choose to control affects how you can use each entity.

Controlling...	Affects...
Search behavior	Whether you can make an entity discoverable in search
Facet behavior	Whether you can use an entity as a search filter
Display behavior	Whether you can show or hide an entity

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

- Product and Product Category Standard Fields
- Product Custom Fields
- Update the Commerce Search Index

Product and Product Category Standard Fields

Standard fields have characteristics that affect whether you can control a field's searchable, facetable, displayable, and sortable behavior.

Before you use product standard fields, review these characteristics.

Product Standard Field Name	Field Label	Controllable Behavior			
		Searchable	Facetable	Displayable	Sortable
CreatedDate	Created Date				✓
CurrencyIsoCode	Product Currency				
Description	Product Description	✓		✓	
DisplayUrl	Display URL	✓			
Family	Product Family				✓

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Product Standard Field Name	**Field Label**	**Controllable Behavior**			
		Searchable	**Facetable**	**Displayable**	**Sortable**
		✓	✓	✓	
Name	Product Name	✓		✓	✓
ProductCode	Product Code	✓		✓	✓
QuantityUnitOfMeasure	Quantity Unit of Measure	✓	✓		✓
StockKeepingUnit	Product SKU	✓		✓	✓

Before you use product category standard fields, review these characteristics.

Product Category Standard Field Name	**Field Label**	**Controllable Behavior**			
		Searchable	**Facetable**	**Displayable**	**Sortable**
Description	Category Description			✓	
Id	Category ID		✓		
Name	Category Name	✓		✓	

SEE ALSO:

How Behaviors Are Controlled

Product Custom Fields

Update the Commerce Search Index

Product Custom Fields

Custom fields have characteristics that affect whether you can control the field's searchable, facetable, displayable, and sortable behavior.

Before you use product custom fields, review these characteristics.

Custom Product Field Name	Controllable Behavior			
	Searchable	**Facetable**	**Displayable**	**Sortable**
Formula			✓	
Lookup Relationship			✓	
External Lookup Relationship			✓	
Checkbox		✓	✓	
Currency	✓		✓	✓
Date			✓	✓
Date/Time			✓	✓
Email	✓		✓	✓
Number	✓		✓	✓
Percent	✓		✓	✓
Phone	✓		✓	✓

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Custom Product Field Name	**Controllable Behavior**			
	Searchable	**Facetable**	**Displayable**	**Sortable**
Picklist	✓	✓	✓	✓
Picklist (Multi-Select)	✓	✓	✓	✓
Text	✓		✓	✓
Text Area	✓		✓	✓
Text Area (Long)	✓		✓	
Time			✓	
URL	✓		✓	✓

SEE ALSO:

- How Behaviors Are Controlled
- Product and Product Category Standard Fields
- Update the Commerce Search Index

Modify or Remove Custom Fields

To ensure that Search works properly, make sure to mark the field as unsearchable before changing its name or removing it.

1. Before renaming or removing a custom field, mark it as unsearchable.
2. Remove the field.

   If you're only removing the field, go to step 5. If you're renaming the field, continue to the next step.
3. Create a custom field with the new name.
4. Mark the new custom field as searchable.
5. Update the search index. See Update the Commerce Search Index on page 177.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

How Behaviors Are Controlled

Mark Product Fields as Searchable

Mark Products as Searchable or Not Searchable

After you create your initial search index, all products in the catalog are searchable by default. If you want to make a product not searchable, you can exclude it from search. You can change whether a product is searchable at any time.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When marking products as searchable or not searchable, keep the following in mind.

- For a product to be searchable, it must also be active.

  Each Product Workspace has an Active column. When Active is selected, the product is visible in all the associated stores. For information about changing a product's active state, see Use the Product Workspace to Manage and Update Products.
- You mark a product's search status for individual stores. You can mark a product searchable in one store and make it not searchable in another store.
- Marking a product as not searchable prevents it from being returned in the search results. However, as long as a product is active, it appears in all the associated stores, even if it's not searchable.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Click the product name that you want to mark as searchable or unsearchable.
4. In the product page, from the store's tile, click the row actions menu icon for the store that you want to change.
   - To let shoppers with access find the product in a search, select **Mark as Searchable**.

- To prevent shoppers from finding the product in a search, select **Mark as Not Searchable**.

SEE ALSO:

Mark Product Fields as Searchable
Configure Product Search Filters for a Commerce Store
Configure How to Display Search Results

Mark Product Fields as Searchable

Product fields are consistent from product to product. For example, each product has a field for Product Name, Product Description, and Product Image. By default, some product fields are marked as searchable.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

In addition to the default searchable fields, you can mark additional standard and custom fields as searchable. Content in marked fields is then indexed for use by the search engine. You can also choose to not mark a field as searchable, for example, if the field contains sensitive information or it provides generic data.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When marking product fields as searchable, keep these considerations in mind.

- A product can have up to 25 searchable fields or other attributes. More than 25 searchable fields or other attributes can interfere with search index updates.
- Commerce Search limits the number of searchable values that you can configure. You can configure individual maximums of 25 searchable fields, 50 results filters, and 10 sortable fields but only up to a combined maximum of 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
- With product variations, parent products and their fields aren't searchable.
- When using picklists, make sure to activate any picklist values before building search indexes.
- The Category Name, Product Name, SKU, Product Description, and Product Code fields are searchable by default. Besides SKU and Product Code, these fields can be changed to not searchable. SKU and Product Code remain searchable even if marked not searchable because they're used as identifiers for SKU searches.

Tip: If you use field encryption, we recommend not encrypting product fields because that makes them not searchable. You can mark encrypted product fields as searchable, but encryption overrides the setting and they remain unsearchable.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click **Searchable Fields**.
4. Click **Manage Searchable Fields**.
5. In the Manage Searchable Fields window:
   - To mark a field as searchable, click ⊞.
   - To make a field not searchable, click ☑.
6. Click **Save**.

Note: Changes appear in the store after the next search index rebuild. For more information, see Update the Commerce Search Index on page 177.

SEE ALSO:

Mark Products as Searchable or Not Searchable

Configure Product Search Filters for a Commerce Store

Configure How to Display Search Results

Deactivate and Reactivate Values

Configure Product Search Filters for a Commerce Store

Filters improve the shopping experience by letting customers narrow their search results. You can create filters from product fields, such as size, finish, and color. A filter can also include selectable values. For example, a color filter can have the values red, blue, and green. If a filter has values, they appear on the results page under the parent filter.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

When adding product filters, keep these considerations in mind.

- Search can use up to 50 product fields as possible filters.
- Category is the only default field. It's always included as a filter option, and you can't remove it. You can select up to 49 other fields.
- Commerce Search limits the number of searchable values that you can configure. You can configure individual maximums of 25 searchable fields, 50 results filters, and 10 sortable fields but only up to a combined maximum of 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
- The use of HTML rich-text is not supported when creating picklist values.
- Field-level security settings aren't applied to filters. Only add filters that you want shoppers to use.

Search shows up to 10 facets. The Category field is selected by default. Fields appear in your store's search filters in the order that you define them on the Results Filters page, unless you enable automatic selection of the most relevant facets.

Note: Make sure to update the search index after adding or removing fields in the Selected Fields column.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. On the Results Filters tab, click **Manage Filters**.
4. In the Available Fields column, move up to 49 filters to the **Selected Fields** column.
5. To change the display order of the filters, select a filter in the right column and use the up and down arrows to move the filter.

   If you choose to automatically select the 10 most-relevant facets, the order in the Selected Fields column is ignored.
6. Save your changes, and on the Search Index tab, update the search index.

Important: For B2B stores, we recommend that you localize all filter values, such as red, blue, and green on a color filter. By localizing the values, you ensure that all filters appear as expected. For more information about translation and localization, see Sell Globally on page 312.

SEE ALSO:

- Mark Products as Searchable or Not Searchable
- Mark Product Fields as Searchable
- Configure How to Display Search Results
- Automatically Select the Most Relevant Facets

Configure How to Display Search Results

Define how many values appear for each search filter and how many search results to show on a page. You can choose to skip additional entitlement checks, automatically select and display relevant facets, and group search results under parent products.

Set the Maximum Number of Results per Page

You can limit the number of products that appear per page on Search Results and Category Detail pages.

Reduce Entitlement Checks for Faster Results

User entitlement checks are run as part of a search index update and also when retrieving search results. Though applying both entitlement checks ensures the most accurate information is provided in Search query results, you can get faster search performance by skipping the second entitlement check.

Select a Price Book for Sort

To arrange search results by price, select a price book for sort to use. The price book you select is always used for sort, regardless of whether a customer is assigned to a different price book based on buyer group or entitlement policy. Price book entries for deleted, archived, or inactive products aren't returned in search results. Results are sorted and returned based on the store's default currency.

Automatically Select the Most Relevant Facets

Automatically select, order, and display the default Category facet and the most relevant facets from the Selected Fields column based on search results.

Set the Maximum Number of Values per Facet

On Category Detail and Search Results pages, facets can have values that buyers use to further narrow the products that are returned. For example, a facet like "shoes" can have values like "women," "men," and "children." You can specify the number of values that a facet can have.

Set the Maximum Number of Results per Page

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can limit the number of products that appear per page on Search Results and Category Detail pages.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click the **Results Display Settings** tab.
4. In the Results Display Settings section, click the pencil next to Results per Page, and enter a number from 1 to 100.
5. Save your changes.

   It can take up to 2 minutes for the search page to reflect the change.

SEE ALSO:

Configure How to Display Search Results

Mark Products as Searchable or Not Searchable

Mark Product Fields as Searchable

Configure Product Search Filters for a Commerce Store

Adjust Search Settings for Product Variation Grouping

Reduce Entitlement Checks for Faster Results

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

User entitlement checks are run as part of a search index update and also when retrieving search results. Though applying both entitlement checks ensures the most accurate information is provided in Search query results, you can get faster search performance by skipping the second entitlement check.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click the **Results Display Settings** tab.
4. In the Results Display Settings section, click the pencil next to Skip additional entitlement check for search, and select the checkbox.
5. Save your changes.

After disabling the second entitlement check, update the search index to ensure that the data is up to date. Changing entitlements and not updating the search index results in mismatched data and can produce inaccurate results.

SEE ALSO:

Configure How to Display Search Results
Mark Products as Searchable or Not Searchable
Mark Product Fields as Searchable
Configure Product Search Filters for a Commerce Store
Update the Commerce Search Index
Adjust Search Settings for Product Variation Grouping

Select a Price Book for Sort

To arrange search results by price, select a price book for sort to use. The price book you select is always used for sort, regardless of whether a customer is assigned to a different price book based on buyer group or entitlement policy. Price book entries for deleted, archived, or inactive products aren't returned in search results. Results are sorted and returned based on the store's default currency.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click the **Results Display Settings** tab.
4. In the Results Display Settings section, click the pencil next to Price Book ID.
5. Click in the **Price Book ID** field, and select a price book from the picklist.

   The price book must be active and have valid or empty usage dates.

   Note: Using a price sort rule, without first selecting a price book, results in an error message.

6. Save your changes.

SEE ALSO:

Configure How to Display Search Results
Pricing for Commerce Stores
Mark Products as Searchable or Not Searchable
Update the Commerce Search Index
Configure Store Language, Currency, and Tax
Adjust Search Settings for Product Variation Grouping

Automatically Select the Most Relevant Facets

Automatically select, order, and display the default Category facet and the most relevant facets from the Selected Fields column based on search results.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click the **Results Display Settings** tab.
4. Under Filters and Facets, click the pencil next to Autoselect the most relevant facets, and select the checkbox.
5. Save your changes.

SEE ALSO:

Configure How to Display Search Results

Mark Products as Searchable or Not Searchable

Mark Product Fields as Searchable

Configure Product Search Filters for a Commerce Store

Adjust Search Settings for Product Variation Grouping

Set the Maximum Number of Values per Facet

On Category Detail and Search Results pages, facets can have values that buyers use to further narrow the products that are returned. For example, a facet like "shoes" can have values like "women," "men," and "children." You can specify the number of values that a facet can have.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click the **Results Display Settings** tab.
4. Under Filters and Facets, click the pencil next to Maximum Values per Filter, and enter a number from 1 to 100.
5. Save your changes.

It can take up to 2 minutes for the search page to reflect the change.

SEE ALSO:

Configure How to Display Search Results

Mark Products as Searchable or Not Searchable

Mark Product Fields as Searchable

Configure Product Search Filters for a Commerce Store

Adjust Search Settings for Product Variation Grouping

Sort Options

Add and modify sort rules to let customers arrange results in search and category pages. You can create rules from available products and product attributes and define how these rules appear to customers.

Enable or Disable Sort for Search Results

Sorting is enabled for search and category pages by default. However, you can control whether customers can see the sorting menu that appears on these pages with the Results Layout component. You can change the sorting properties on any page that uses the Results Layout component.

Add a Sort Rule

Create a sort rule based on available products and product attributes to let customers arrange results in search and category pages.

Edit or Delete a Sort Rule

You can edit a sort rule and change where it appears in the sorting menu. To remove a sort rule from the sorting menu, delete the rule.

Enable or Disable Sort for Search Results

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Sorting is enabled for search and category pages by default. However, you can control whether customers can see the sorting menu that appears on these pages with the Results Layout component. You can change the sorting properties on any page that uses the Results Layout component.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Because each instance of the Results Layout component is unique, set properties on each instance separately.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. From the Pages dropdown menu, select **Search Results** or **Category Detail**.
4. Select the **Results Layout** component.
5. In the Sorting Menu section, select the **Show sorting menu** checkbox so users can sort search results. Deselect it to disable sorting.
6. Publish the store.

The sorting menu appears only when a search returns results. The selected sorting option remains enabled for the current search results, unless you change it. When you issue another search request, the sorting option reverts to the first sort option in the sorting menu.

SEE ALSO:

Add a Sort Rule

Edit or Delete a Sort Rule

Add a Sort Rule

Create a sort rule based on available products and product attributes to let customers arrange results in search and category pages.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

When creating a sort rule, keep these considerations in mind.

- The default Best Match rule sorts output based on its relevance to the search results. Commerce Search uses the frequency of the search terms in each product and how often each term appears in the catalog to determine the sort order for the search output.
- You can't delete the default Best Match rule, but you change the order in which it appears in the sort menu.
- Commerce Search limits the number of searchable values that you can configure. You can configure up to 25 searchable fields, 50 results filters, or 10 sortable fields, but the combined maximum is 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
- Sort rules apply to simple products and variation child products. When your store's results display settings are set to Group Variations Under Parent, product variation groups can appear out of order in sorted search results. Commerce Search applies sort rules to the most relevant child product within a variation group, and search results return the variation parent product.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click **Sort Rules**.
4. Click **New**.
5. In the New sort option window, select the product field name to use as a sort option.

   Before sorting results by price, select a price book on the Search tile's Results Display Settings tab.

   Note: You can't delete custom fields that you use to create sorting rules. To delete a custom field, first delete the sorting rule that uses that field.

6. Select an ascending or descending sort order.

   Values in the Sort Order Label menu change to reflect your sort order selection.

7. (Optional) Select a sort order label to append to the sort option in the sorting menu.

   The sort order label appears in parentheses after the product field name. This label can help clarify how sorting occurs, for example, alphabetically, numerically, by cost, or the size of a product.

8. (Optional) Specify where the new rule appears in the sort menu.

   By default, a new sort option is added to the end of the menu. You can override this placement by changing its numerical menu position. Until a shopper or buyer selects a different rule, sort order follows the first sort rule in the sort menu.
9. Click **Save**.
10. Update the search index.

SEE ALSO:

Enable or Disable Sort for Search Results

Edit or Delete a Sort Rule

Select a Price Book for Sort

Edit or Delete a Sort Rule

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

You can edit a sort rule and change where it appears in the sorting menu. To remove a sort rule from the sorting menu, delete the rule.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. Click **Sort Rules**.
4. For the sort rule that you want to edit, click the actions dropdown menu in the rightmost column of the table.
5. Click **Edit**.
6. In the Edit sort option window, you can change these parameters.

Parameter	Description
Product Field Name	Product or attribute value to use for the sort rule.
Sort Order	Choice of Ascending or Descending.
Sort Order Label	Optional label to help clarify how sorting occurs. For example, alphabetically, numerically, by cost, the size of a product, and so on.
Sort Menu Order	Numerical position where the sort option appears in the menu.

7. Click **Save**.

8. Update the search index.

SEE ALSO:

Enable or Disable Sort for Search Results

Add a Sort Rule

Commerce Search Index

The search index makes products in your store searchable. Rebuild the search index after making updates to your store so that the changes are reflected for your customers.

Update the Commerce Search Index

Update your search index so that changes to your products appear on your search and category pages.

Commerce Search Index Considerations

Before activating your store, update your search index to enable shoppers to see products on your search and category pages. When you make changes to your store configuration or product catalog, update your search index to make the changes appear. You can manually update your index or turn on automatic updates.

Commerce Search Index Update Methods

You can run a partial or full search index update depending on the type of information that has changed in your store configuration or product catalog.

Commerce Search Index Error Mapping

Updating the search index can result in product errors and index failures. If all products have errors, the index fails. Review index failures in the red banner on the Search Index page, and review product errors in the orange banner. You can also download a CSV file to resolve product errors. Product errors and index failures are refreshed with each partial index update.

Commerce Search Index Troubleshooting

Updating the search index can result in product errors and index failures. When some products have errors, you can download a CSV file on the Search Index page to review and resolve the errors. If all products have errors, the index fails. A common reason for product errors and index failures includes exceeding limits.

Update the Commerce Search Index

Update your search index so that changes to your products appear on your search and category pages.

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Search**.
3. To update the index automatically, turn on **Automatic Updates**.

   You can manually update the index or turn on automatic updates. For stores created after Summer ’24, automatic updates are turned on by default. When you enable automatic updates, the system checks every 5 minutes for changes to your store configuration or product catalog and updates the index if necessary.

   You’ll receive a notification when the search index completes with errors or fails.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

4. To update the index manually, click **Update**, select a method, and click **Update**.

   Partial updating saves time because it updates only the information that has changed. If your store has changes that aren't supported by the Partial Update method, only the Full Update method is available. See Commerce Search Index Update Methods on page 179.

   For all the stores in your org, you can update the search index up to 60 times per hour. For an individual store, wait at least 5 minutes between full index updates.

   You'll receive a notification when the search index completes, completes with errors, or fails.

After an update completes, your changes appear in the active store, and the index status and details are added to the History on the Search Index page. If the index update failed, the index failure message is shown on the Search Index page. If the update has product errors, you can download a CSV file to view the errors.

If an index has no search activity for 60 consecutive days, it's deleted. To reactivate search, update your index.

SEE ALSO:

Commerce Search Index Considerations
Commerce Search Index Error Mapping
Commerce Search Index Troubleshooting
Considerations for Product Searchability
Enable Semantic Search for Commerce

Commerce Search Index Considerations

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Before activating your store, update your search index to enable shoppers to see products on your search and category pages. When you make changes to your store configuration or product catalog, update your search index to make the changes appear. You can manually update your index or turn on automatic updates.

When updating the search index, keep these considerations in mind.

- If you only modify price books or price book entries, you don't need to update the index unless you have a sort rule based on price.
- The search index includes only variation child products and simple products. Variation parent products aren't included when you update the index and are only used for decoration purposes. When you enable Group Variations Under Parent in the Results Display Settings, the search results are decorated with the variation parent although the match is on the variation child product.
- Products without entitlement policies are included in the index but aren't searchable.
- Products with more than 2,000 buyer groups are excluded from the index.
- Update your search index whenever you change or remove these items.
  - Product or product attribute fields that are marked as searchable, sortable, or filterable
  - Values of product fields that are marked as searchable or filterable
  - Products in the store's catalog
  - Product translations in the store's catalog
  - Categories or the category hierarchy structure
  - Category names
  - Translations of category names

- Languages in a store or catalog
- Language translations for a store or catalog
- Products in an entitlement policy
- Product variation grouping
- Sorting rules
- Geolocation of your organization
- Names of custom fields on the Product2 object

SEE ALSO:

Update the Commerce Search Index
Commerce Search Index Update Methods
Mark Products as Searchable or Not Searchable
Mark Product Fields as Searchable
Enable Semantic Search for Commerce

Commerce Search Index Update Methods

You can run a partial or full search index update depending on the type of information that has changed in your store configuration or product catalog.

Method	Use
Partial Update	Use this method when you change or remove products, catalogs, assignment categories, and entitlements.
Full Update	Use this method when you: • Create a store, turn on semantic search, update 2,000 or more products, modify product sets, or make structural modifications, such as changing searchable fields, results filters, or sort rules. • Change URL slugs, product media, or translations for picklist values used as search attributes. • Haven't updated your search index for more than 60 consecutive days.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Update the Commerce Search Index
Commerce Search Index Considerations

Commerce Search Index Error Mapping

Updating the search index can result in product errors and index failures. If all products have errors, the index fails. Review index failures in the red banner on the Search Index page, and review product errors in the orange banner. You can also download a CSV file to resolve product errors. Product errors and index failures are refreshed with each partial index update.

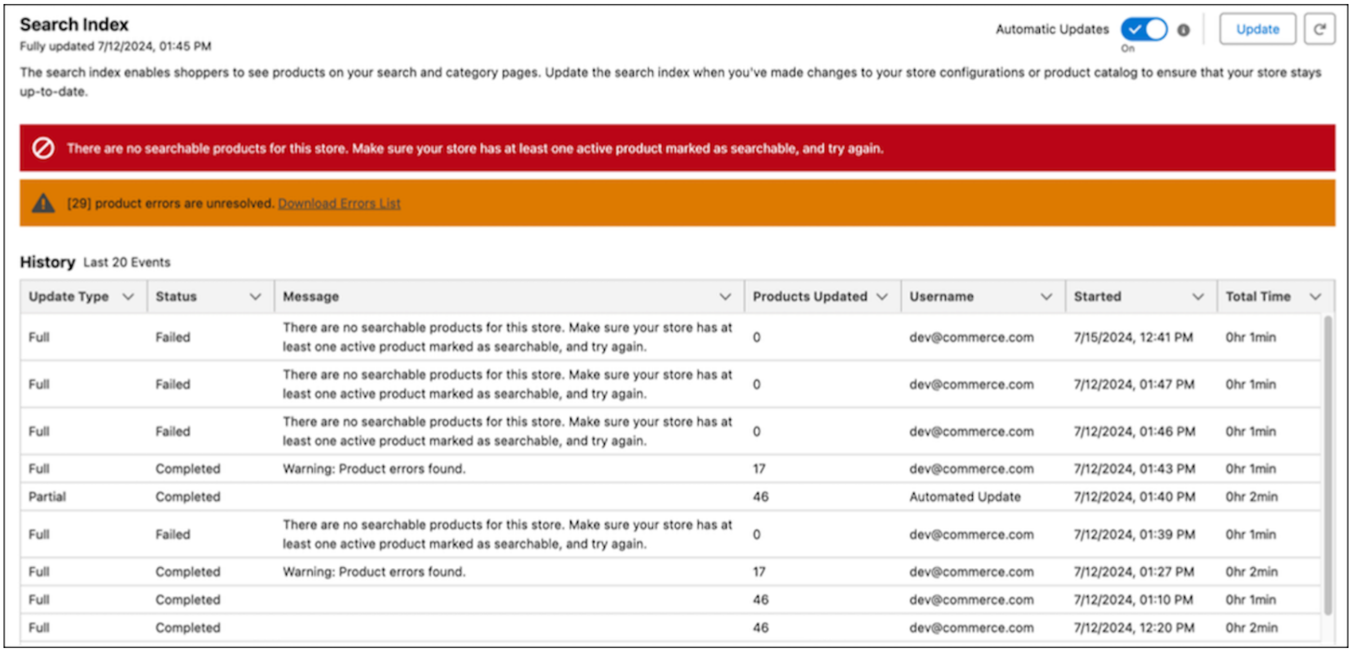
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Error Mapping



Search Index

Fully updated 7/12/2024, 01:45 PM

The search index enables shoppers to see products on your search and category pages. Update the search index when you've made changes to your store configurations or product catalog to ensure that your store stays up-to-date.

There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.

[29] product errors are unresolved. Download Errors List

History Last 20 Events

Update Type	Status	Message	Products Updated	Username	Started	Total Time
Full	Failed	There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.	0	dev@commerce.com	7/15/2024, 12:41 PM	0hr 1min
Full	Failed	There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.	0	dev@commerce.com	7/12/2024, 01:47 PM	0hr 1min
Full	Failed	There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.	0	dev@commerce.com	7/12/2024, 01:46 PM	0hr 1min
Full	Completed	Warning: Product errors found.	17	dev@commerce.com	7/12/2024, 01:43 PM	0hr 1min
Partial	Completed		46	Automated Update	7/12/2024, 01:40 PM	0hr 2min
Full	Failed	There are no searchable products for this store. Make sure your store has at least one active product marked as searchable, and try again.	0	dev@commerce.com	7/12/2024, 01:39 PM	0hr 1min
Full	Completed	Warning: Product errors found.	17	dev@commerce.com	7/12/2024, 01:27 PM	0hr 2min
Full	Completed		46	dev@commerce.com	7/12/2024, 01:10 PM	0hr 1min
Full	Completed		46	dev@commerce.com	7/12/2024, 12:20 PM	0hr 2min

Index Update Status	Scenario	Maps To	Action
Completed	Index completed without product errors	Completed status in History	None
	Index completed with product errors	Orange product error banner	Download the CSV file to resolve the product errors. See Commerce Search Index Troubleshooting on page 181.
Failed	Index failed without product errors	Red index failure banner	Use the message to resolve the index failure.
	Index failed with product errors	• Red index failure banner	• In the red index failure banner, use the

Index Update Status	Scenario	Maps To	Action
		• Orange product error banner	message to resolve the index failure. • In the orange product error banner, download the CSV file to resolve the product errors. See Commerce Search Index Troubleshooting on page 181.

SEE ALSO:

Update the Commerce Search Index

Commerce Search Index Considerations

Commerce Search Index Troubleshooting

Updating the search index can result in product errors and index failures. When some products have errors, you can download a CSV file on the Search Index page to review and resolve the errors. If all products have errors, the index fails. A common reason for product errors and index failures includes exceeding limits.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Product Errors

Message Code	Resolution
ErrorTooManyBuyerGroupsPerProduct	You reached the limit of 2,000 buyer groups for a product. Remove some buyer groups from the product and try again.
ErrorAttributeDataSizeLimitExceeded	You reached the data size limit for all localized and non-localized attributes of a product for a single locale. Contact Salesforce Customer Support.

SEE ALSO:

Update the Commerce Search Index

Commerce Search Index Considerations

Commerce Search Index Error Mapping

Manage No Search Results

Manage how buyers are redirected or alerted when their search yields no results. If you have a B2B or D2C store that uses the LWR template, use the No Results Layout component to display a no results message.

Create a No Search Results Message

If you have a B2B or D2C store built using an LWR template, you can display a message on the search results page when there are no results. Use the No Results Layout component in Experience Builder to display and modify the message.

Modify the Default B2B No Search Results Page (Aura)

If you have a B2B store that uses the Aura template, when a product search yields no results, buyers are redirected to a no search results page by default. This page contains preloaded content that you can use or modify for your store.

Create a No Results Page Variation for B2B Product Searches (Aura)

If you have a B2B store that uses the Aura template, you can create and modify a new variation for the No Search Results page based on the default page content.

Add a No Search Results Message to the Search Results Page (Aura)

If you have a B2B store that uses the Aura template, you can bypass any No Search Results page redirects by showing a no search results message directly on the search results page.

Create a No Search Results Message

If you have a B2B or D2C store built using an LWR template, you can display a message on the search results page when there are no results. Use the No Results Layout component in Experience Builder to display and modify the message.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

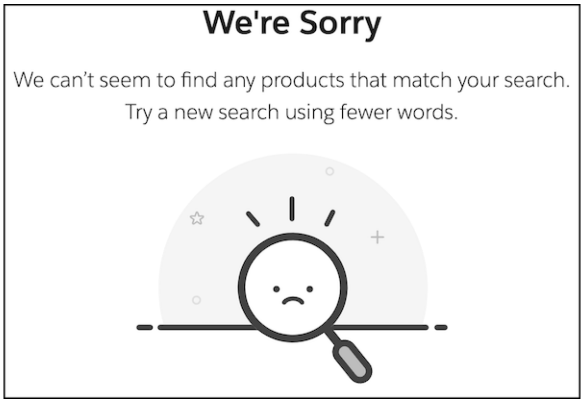
Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. From the Pages dropdown menu, select **Search**.
4. Select the **No Results Layout** component.
5. Click the **HTML Editor** component and then click **Edit Markup**.
6. Modify the page content in HTML format and click **Save**. You can change the text, image, and styling of the message.
7. To display a message while search results are loading, drag an HTML Editor component into the Loading State component. Click **Edit Markup**, modify the page content in HTML format, and save your changes.
8. Publish your site.

Example: Here's how the default HTML looks when you publish the page.

```
   <div style="display: flex; flex-direction: column; align-items: center; text-align:
 center; height: 50vh; justify-content: center;">
    <h1 class="slds-text-heading_large" style="margin-bottom: 20px; font-weight:
bold;">We're Sorry</h1>
    <p class="slds-text-heading_small" style="margin-bottom: 5px;">We can't seem to
find any products that match your search.</p>
    <p class="slds-text-heading_small">Try a new search using fewer words</p>
   <div style="background: url({!Site.basePath}/assets/images/empty-search.svg) center
 no-repeat; background-size: contain; margin-top:25px; height: 200px; width: 50%;"></div>
```

```
    </div>
```



We're Sorry

We can't seem to find any products that match your search.
Try a new search using fewer words.

SEE ALSO:

- Manage No Search Results
- LWR and Aura Store Templates

Modify the Default B2B No Search Results Page (Aura)

If you have a B2B store that uses the Aura template, when a product search yields no results, buyers are redirected to a no search results page by default. This page contains preloaded content that you can use or modify for your store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

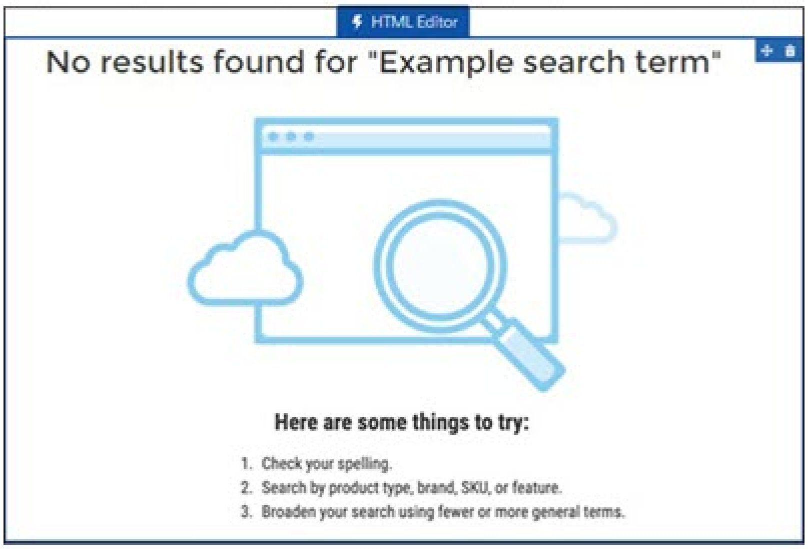
Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. From the Pages dropdown menu, select **No Search Results**.
4. Click the **HTML Editor** component and then click **Edit Markup**.
5. Modify the page content in HTML format.

   Here's the default HTML and how it looks when you publish the page. In the first line, the variable `{!term}` is replaced with the search term that the buyer enters.

```
<h1> No results found for "{!term}" </h1><br>
 <div class="slds-grid slds-grid--vertical slds-align--absolute-center
slds-text-longform">
    <img src="/imagevault/x/img/search/no-results.png" class="slds-p-horizontal--large"
 alt=""/>
     <h2 class="slds-text-heading_medium"> Try these search tips instead: </h2>
     <ol class="slds-text-body_regular">
         <li> Check your spelling. </li>
         <li> Search by product type, brand, SKU, or feature. </li>
         <li> Broaden your search using fewer or more general words. </li>
```

```
  </ol>
</div>
```



No results found for "Example search term"

Here are some things to try:

1. Check your spelling.
2. Search by product type, brand, SKU, or feature.
3. Broaden your search using fewer or more general terms.

6. Click **Save**, and publish the page.

Note: If you prefer not to redirect users to another page, you can show a no-results message directly on the Search Results page.

SEE ALSO:

Manage No Search Results

Add a No Search Results Message to the Search Results Page (Aura)

Create a No Results Page Variation for B2B Product Searches (Aura)

If you have a B2B store that uses the Aura template, you can create and modify a new variation for the No Search Results page based on the default page content.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.

   Select a store built with the Aura template.

2. Select **Website Design**, and then click **Experience Builder**.
3. From the Pages dropdown menu, select **No Search Results**.
4. From the Pages dropdown menu, click ⚙ across from the page name to open the page properties.
5. Select the **Page Variations** tab, and then click **New Page Variation** > **No Search Results**. Click **Next**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

6. Enter a name for the variation, and click **Create**.
   Experience Builder creates the page variation and returns to the No Search Results page.
7. Reopen Page Properties, and then reopen Page Variations.
8. (Optional) From the row actions menu for the new variation, select **Set to Default**.

   You can change the page variation to be the default at any time.
9. From the row actions menu for the new variation, select **Edit**.
   Experience Builder opens the new variation in the No Search Results page.
10. Click the **HTML Editor** component and then click **Edit Markup**.
11. Modify the default page content using HTML format.
12. Click **Save**, and publish the page variation.

Note: If you prefer not to redirect users to another page, you can show a no-results message directly on the Search Results page.

SEE ALSO:

Manage No Search Results

Add a No Search Results Message to the Search Results Page (Aura)

Add a No Search Results Message to the Search Results Page (Aura)

If you have a B2B store that uses the Aura template, you can bypass any No Search Results page redirects by showing a no search results message directly on the search results page.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.

   Select a store built using an Aura template.
2. Select **Website Design**, and then click **Experience Builder**.
3. From the Pages dropdown menu, select **Search Results**.
4. On the search results page, click the **Results Layout** component to edit its properties.

   Note: On the Results Layout component, no-results message properties are available only when the **Page Type** is set to Search Results.

   a. To ensure that the no-results message properties are available, set the **Page Type** field to Search Results.
   b. In the No Search Results properties section, select the checkbox to display a no results message on the results page.
   c. Add your message in the No Results Message field using HTML format.

      Here's an example HTML for creating your own message.

```
<br><br>
<h1> No results found</h1>
<br>
     <h2>Try these search tips instead:</h2>
<br>
```

```
      <ol>
        <li>Check your spelling</li>
        <li>Search by product type, SKU, or feature</li>
        <li>Broaden your search using fewer or more general words</li>
      </ol>
```

Note: If you prefer to redirect users to another page, deselect the checkbox. The B2B template includes a No Search Results page that you can use instead.

SEE ALSO:

Manage No Search Results

Search Engine Optimization (SEO) for Commerce

Search engine optimization (SEO) focuses on increasing non-paid search engine traffic for your site. Utilizing both creative and technical elements, you can improve search engine ranking and awareness, with the goal of driving more traffic to your B2B or D2C store.

SEO-Friendly URLs for Commerce

Use canonical URLs and configure URL slugs to ensure your store's URLs optimally serve users and search engines.

Page Meta Tags for Commerce

Meta tags in HTML documents provide structured data used by search engines for ranking and to show content in search results. You can configure page meta tags such as titles, descriptions, and headings in your store. For product pages, the Title Tag and Meta Description product fields determine the title and description meta tags.

Manage the Store Sitemap

Sitemaps for B2B and D2C stores improve SEO by giving search engines structured information for more efficient indexing. Like other Experience Builder sites, B2B and D2C stores automatically refresh their sitemaps weekly. You can also generate a manual sitemap refresh every 24 hours.

Store Snapshots for SEO

To improve SEO performance, B2B and D2C stores provide web crawlers with SEO optimized HTML using the Content Snapshot service.

SEO-Friendly URLs for Commerce

Use canonical URLs and configure URL slugs to ensure your store's URLs optimally serve users and search engines.

SEO Considerations for Store URLs

You can improve SEO performance by optimizing URL configuration in your B2B or D2C store.

Add URL Slugs to Store Pages

You can add a URL slug directly on a Product or Category record, or bulk update Products and Categories with a CSV file import. To use URL slugs, first configure languages and localizations for your store. You can only add one URL slug for each language. When you enable URL slugs, default URLs for product and category pages are updated. For example, product pages use the base URL `/product/:urlName`.

SEO-Friendly URLs for Store Categories

Set up SEO-friendly URLs for a store's categories in bulk using a category import. When you perform a category import, you can also add or update category paths and descriptions.

SEO Considerations for Store URLs

You can improve SEO performance by optimizing URL configuration in your B2B or D2C store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

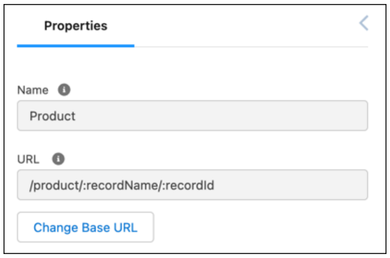
Canonical URLs

Choose a canonical URL to consolidate a single page that can be reached through multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site. Without canonical URLs, search engines consider all of your identical or similar URLs as unique pages, which can cause SEO issues.

- Search engines can miss your unique content.
- Too much duplicate content can dilute content ranking.
- Ranked content doesn't reflect the best URL.

Shopper-Friendly URLs

Product and Category pages generate shopper-friendly URLs based on the title of the product or category appended to a base path and object ID. The base path is configurable in the URL structure, but the category path or product record name and the record ID are required. For example, a category page has the URL `/category/:categoryPath/:recordId`. From Experience Builder, in Page Properties, you can edit the `/category/` portion of this base URL.



Name: Product

URL: /product/:recordName/:recordId

URL Slugs

Create SEO-friendly URL snippets, or "slugs," for each Product and Category page. A URL slug improves SEO value by replacing a record ID with relevant and human-readable information in URLs, ensuring that your store's pages are optimally surfaced in search engines. URL slugs are available in B2B Commerce and D2C Commerce LWR sites.

URL slugs map to the full path `store.com/product/{custom-slug}` for products and `store.com/category/{custom-slug}` for categories. From Experience Builder, in Page Properties, you can edit the `/product/` and `/category/` URL snippets, but you can't remove them. For example, a Product page can have the URL slug `french-roast`, resulting in the full URL `store.com/product/french-roast`.

Auto-generated, canonical URLs for Product and Category pages use record IDs. Customers won't see a slug-based URL unless they directly input a link that includes the URL slug.

When adding a URL slug, keep these considerations in mind.

- To use URL slugs, enable translation workbench and add active languages for translation. For more information, see Translation Workbench.
- URL slugs have a character limit of 150 and allow these characters: `a-z A-Z 0-9 . - _ $ & : ; * , = @`. Foreign language characters are also allowed.
- In a Category URL slug, you can use `/` to delimit path segments. For example, the URL slug `coffee/whole-bean` creates the path `store.com/category/coffee/whole-bean`. This use of `/` isn't accepted in a Product page URL slug.
- Use of the term Product2 isn't allowed in a URL slug. This URL is reserved for use in your site.
- When choosing a language for a URL slug, select a language that's active in your org, site, and store. For more information, see Supported Languages.
- Create a URL slug in your store's default language and translate it for each language you support. When a customer is browsing in a language without a URL slug translation, but the page has a URL slug for your store's default language, the slug falls back to the default. For example, if your default site language is English and a customer is browsing in French, both `store.com/fr/product/{slug-french}` and `store.com/fr/product/{slug-english}` will redirect to the corresponding record ID URL.
- When URL slugs are enabled and configured for product and category pages, they're used as the canonical URL in sitemaps created for LWR stores. Otherwise, the sitemap continues using the record ID URL.

Redirects

If you're migrating a site to B2B or D2C Commerce, consider redirecting users to your new store's pages from pages outside of Salesforce. You can also set up redirects for pages within your B2B or D2C store to guide users from outdated product or category URLs to live pages.

SEE ALSO:

Redirect Users to Your Experience Builder Site Pages

SEO Page Properties

Add URL Slugs to Store Pages

You can add a URL slug directly on a Product or Category record, or bulk update Products and Categories with a CSV file import. To use URL slugs, first configure languages and localizations for your store. You can only add one URL slug for each language. When you enable URL slugs, default URLs for product and category pages are updated. For example, product pages use the base URL `/product/:urlName`.

EDITIONS

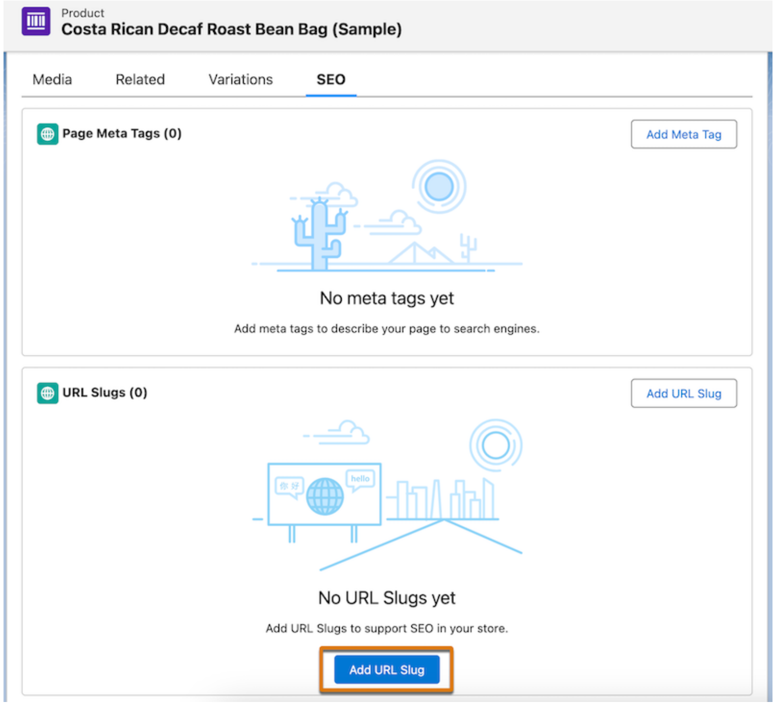
Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter *`Digital Experiences`*, and then select **All Sites**.
3. For an active LWR site, click **Workspaces**. URL slugs aren't available for stores created with the Aura template.
4. From the Experience Workspace, go to **Administration** > **Preferences** and select **Use SEO-friendly URLs on this site**. Publish your site to apply changes. You can't disable this setting after enabling it.
5. To bulk import slugs for Products, upload a CSV file including the column name *`Slug [language code]`*. Use a language code that's active in your org, site, and store. For example *`Slug en_US`*. For more information, see CSV File Format for Importing Commerce Data.

6. To bulk import slugs for Categories, perform a category import with a CSV file including the column name `Slug [language code]`. For more information, see CSV File Format for Importing Category Data for a Store.
7. You can also add a URL slug directly on a Product or Category record. In the navigation sidebar, select **Products** or **Categories**. Select a product or category. On the SEO tab, click **Add URL Slug**.



No meta tags yet

Add meta tags to describe your page to search engines.

No URL Slugs yet

Add URL Slugs to support SEO in your store.

SEE ALSO:

Import Data for a Store Using a CSV File

SEO-Friendly URLs for Store Categories

Set up SEO-friendly URLs for a store's categories in bulk using a category import. When you perform a category import, you can also add or update category paths and descriptions.

Import Category Data for a Store

Use a category import to add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs. Product import files can also include columns for categories, but a product import can't include URL slugs or descriptions for categories.

CSV File Format for Importing Category Data for a Store

When you construct a category import file, specify column headings that correspond to category path, URL slug, and category description information. Each row in the file represents a category and its structure. The column headings are case-insensitive, and the columns can be in any order.

Import Category Data for a Store

Use a category import to add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs. Product import files can also include columns for categories, but a product import can't include URL slugs or descriptions for categories.

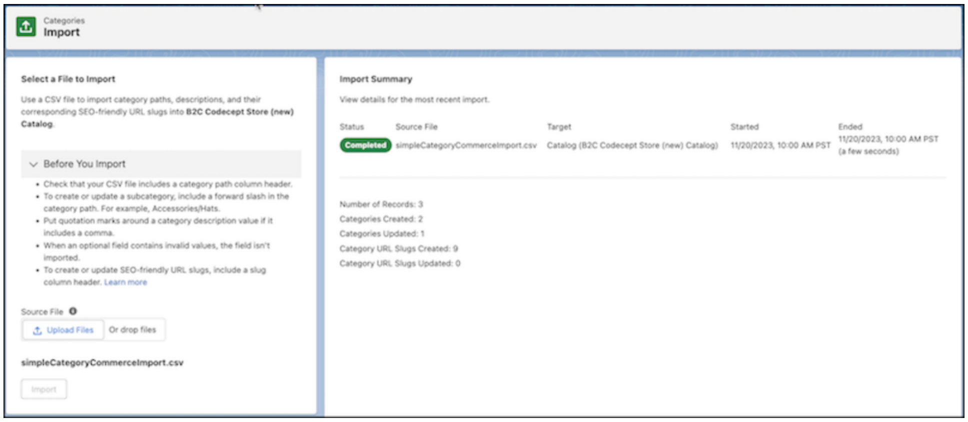
EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. In the App Launcher, find and select **Catalogs**.
2. Select a catalog.
3. On the Categories tab, click **Import**.
4. Click **Upload Files**. You can optionally download a sample data import file to use as a starting point for creating your file.
5. Click **Import**. Because the import is asynchronous, you can perform other tasks while the import processes. To get the status of the import, refresh the page or click the refresh button. The Import Summary report shows the import results, including any errors caused by rows or column headings. If you have errors, fix the file, and import it again.



Select a File to Import

Use a CSV file to import category paths, descriptions, and their corresponding SEO-friendly URL slugs into **B2C Codecept Store (new) Catalog**.

- Check that your CSV file includes a category path column header.
- To create or update a subcategory, include a forward slash in the category path. For example, Accessories/Hats.
- Put quotation marks around a category description value if it includes a comma.
- When an optional field contains invalid values, the field isn't imported.
- To create or update SEO-friendly URL slugs, include a slug column header. Learn more

simpleCategoryCommerceImport.csv

Import Summary

View details for the most recent import.

Status	Source File	Target	Started	Ended
Completed	simpleCategoryCommerceImport.csv	Catalog (B2C Codecept Store (new) Catalog)	11/20/2023, 10:00 AM PST	11/20/2023, 10:00 AM PST (a few seconds)

Number of Records: 3
Categories Created: 2
Categories Updated: 1
Category URL Slugs Created: 9
Category URL Slugs Updated: 0

6. (Optional) Cancel the import.
    a. In the Import Summary, click **Cancel**.
    b. Confirm the cancellation, click **Cancel Import**.
    c. Refresh the page for the Import Summary report to show an accurate count of categories updated prior to the cancellation.

SEE ALSO:

CSV File Format for Importing Category Data for a Store

CSV File Format for Importing Category Data for a Store

When you construct a category import file, specify column headings that correspond to category path, URL slug, and category description information. Each row in the file represents a category and its structure. The column headings are case-insensitive, and the columns can be in any order.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Column Heading	Column Value
Category Description	(Optional) The description of the category, corresponding to the Description field on the ProductCategory object. Put quotation marks around a category description value if it includes a comma.
Category Path	The path of the category, with / to delimit path segments. For example, the category path coffee/whole-bean creates the path store.com/category/coffee/whole-bean. • The last delimited value in the category path is used as the category name.
Slug *`<language code>`*	(Optional) The SEO-friendly URL slug for the category in a specified language. • In the column heading, specify a Salesforce-supported language code. For example, `Slug en_US`. • Use of the term `Product2` isn't allowed in a URL slug. This URL is reserved for use in your site. URL slugs have a character limit of 150 and allow these characters: `a-z A-Z 0-9 . - _ $ & : ; * , = @`. Foreign language characters are also allowed.

SEE ALSO:

- Import Category Data for a Store
- Import Data for a Store Using a CSV File

Page Meta Tags for Commerce

Meta tags in HTML documents provide structured data used by search engines for ranking and to show content in search results. You can configure page meta tags such as titles, descriptions, and headings in your store. For product pages, the Title Tag and Meta Description product fields determine the title and description meta tags.

SEO Guidelines for Commerce Page Meta Tags

To increase the SEO value of your store, add meta tags to Product, Category, and other pages.

Configure Meta Tags to Commerce Store Pages for SEO

To improve your products' search engine visibility, add meta tags that describe the product. You can add product titles and descriptions individually or generate meta tags for multiple products at once using Einstein generative AI.

Structured Data for Commerce Product Meta Tags

Create rich and engaging search results by using structured data from your store to dynamically update a page's meta tags. For example, you can map product attributes like color or size to meta tags using expressions.

SEO Guidelines for Commerce Page Meta Tags

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

To increase the SEO value of your store, add meta tags to Product, Category, and other pages.

For detailed meta tag guidelines, refer to Google Search documentation.

Titles

Search engines extract a page's title from the title meta tag. Use relevant titles for your store to ensure search engines rank your pages for the keywords you want. On Product pages, you can use the Title Tag field to generate title meta tags. On Category pages, use the Name field or a custom field.

Descriptions

The description meta tag is a short page description that can appear in search engine results. Provide an accurate description of the content of your page between 150-165 characters. On Product pages, you can use the Meta Description field to generate description meta tags. On Category pages, use the Category Description field or a custom field.

Headings (H1-6 Tags)

Headings provide page structure to improve the user experience and help search engines understand the content. In B2B and D2C stores, certain pages populate heading tags with relevant information. You can add additional header tags to store pages as component customizations.

- On the product detail page (PDP), the Product Name field populates H1, the top level heading.
- On category pages, the Category Name field populates H1. The phrase "[# of results] of [total] Results" populates H2.
- In store search results, the phrase "[# of results] of [total] items" populates H3.

SEE ALSO:

Configure Meta Tags to Commerce Store Pages for SEO

Configure Meta Tags to Commerce Store Pages for SEO

To improve your products' search engine visibility, add meta tags that describe the product. You can add product titles and descriptions individually or generate meta tags for multiple products at once using Einstein generative AI.

EDITIONS

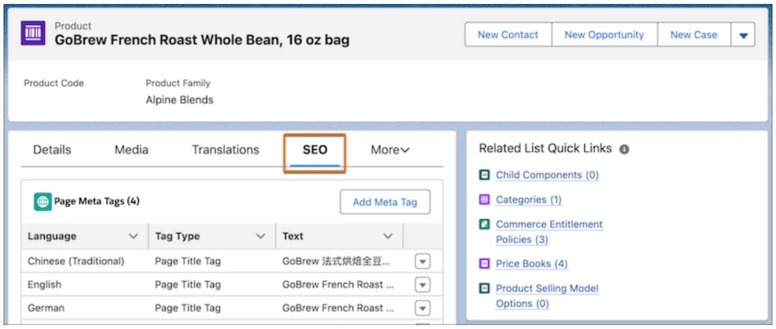
Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Note: Structured data isn't supported in B2B Aura stores.

1. Generate title tag and meta description fields for multiple products at once using Einstein generative AI. For instructions, see Enhance Product Fields with Einstein.
    a. From the Draft Product Text with Einstein page, select the Title Tag or Meta Description field.
    b. Enter an instruction like "Write a short title to display in the Search Engine for these products" or "Write a short description to display in the Search Engine for these products."
2. To view and manage a product's page meta tags, open the product record and navigate to the SEO tab.



Product
GoBrew French Roast Whole Bean, 16 oz bag

Product Code

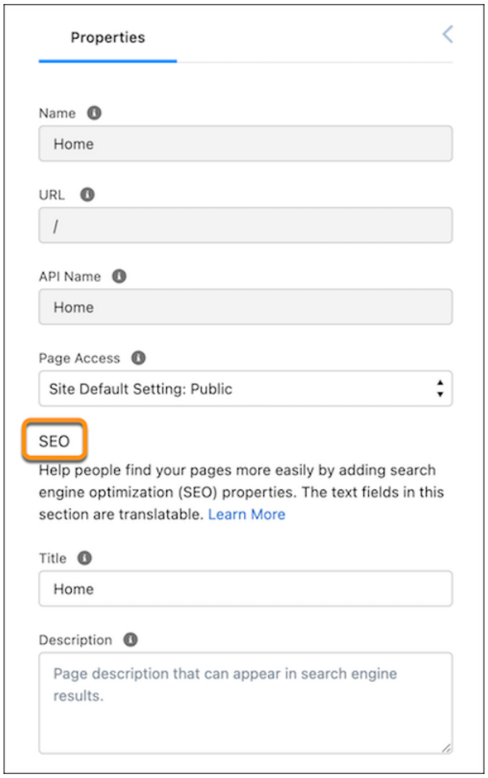
Product Family
Alpine Blends

Page Meta Tags (4)

Language	Tag Type	Text
Chinese (Traditional)	Page Title Tag	GoBrew 法式烘焙全豆...
English	Page Title Tag	GoBrew French Roast ...
German	Page Title Tag	GoBrew French Roast ...

Related List Quick Links
Child Components (0)
Categories (1)
Commerce Entitlement Policies (3)
Price Books (4)
Product Selling Model Options (0)

3. To manually add, edit, or delete page meta tags, use the Page Meta Tags table.
4. To add additional page meta tags to your store, use Experience Builder.
    a. In Experience Builder, open the page that you want to edit.
    b. Click the Page Properties icon ⚙.



Name: Home

URL: /

API Name: Home

Page Access: Site Default Setting: Public

SEO

Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. Learn More

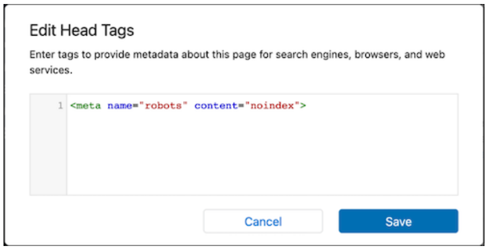
Title: Home

Description: Page description that can appear in search engine results.

c. Enter a title. On Product pages, use the Product Name field or a custom field. On Category pages, use the Name field or a custom field. Use expressions to populate the head tag with values from the record. For example, show a record's object, title, and meta description with `{!Record._Object}:{!Record._Title}:{!Record._Description}`, or a field with `{!Record.Field}`.

d. Enter a description.

e. To use other meta tags, click **Edit Head Tags**, enter a meta tag, and save your changes. For example, the Robots meta tag `<meta name="robots" content="noindex">` tells crawlers not to index a page so it won't show up in search results.


Edit Head Tags

Enter tags to provide metadata about this page for search engines, browsers, and web services.

```
<meta name="robots" content="noindex">
```

f. Save your changes.

SEE ALSO:

SEO Page Properties

SEO Guidelines for Commerce Page Meta Tags

Structured Data for Commerce Product Meta Tags

Create rich and engaging search results by using structured data from your store to dynamically update a page's meta tags. For example, you can map product attributes like color or size to meta tags using expressions.

Note: Structured data isn't supported in B2B Aura stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Field	expression	example value
Product Category Name	`{!Record.ProductCategory.Name}`	"Clothing"
Product Attributes (must use variant products)	`{!Record.ProductAttributes.<custom field you created for variant products>}`	Dependent on the field created for variant products. For example, "Medium" or "Red" for size or color.
Price Currency	`{!Record.Offers.Currency}`	"USD"
Price	`{!Record.Offers.Price}`	"32.99"
Breadcrumb	`{!Record.BreadcrumbList}`	`[{"@type":"ListItem","item":"https://domain.com/storeName/category/merchandise/0ZGxx000000004rGAA","position":1,"name":"Merchandise"},{"@type":"ListItem","item":"https://domain.com/storeName/category/merchandise/clothing/0ZGxx000000006TGAQ","position":2,"name":"Clothing"}]`
Default Product Image	`{!Record.ProductMedia.DefaultImage}`	"https://domain.com/image1.jpg"
Product Detail Images	`{!Record.ProductMedia.ProductDetailImages}`	["https://domain.com/image1.jpg","https://domain.com/image2.jpg"]

To use product attribute values in meta tags, first set up variant products. For more information, see Product Variations and Attributes. To use pricing information, make sure that your products belong to a standard price book. To use breadcrumbs, make sure the primary category of your product is navigable. For more information, see Choose Product Categories to Use in Breadcrumbs.

Use a script with these expressions to add structured data to a custom head tag on a Product Detail Page. For more information, see Configure Page Meta Tags for Commerce.

Example:

```
<script type="application/ld+json">
[{
    "@context": "https://schema.org/",
    "@type": "Product",
    "name": "{!Record.Name}",
    "category": "{!Record.ProductCategory.Name}",
    "color": "{!Record.ProductAttributes.ProductColor__c}",
    "size": "{!Record.ProductAttributes.ProductSize__c}",
    "material": "{!Record.ProductAttributes.ProductMaterial__c}",
    "offers": {
        "@type": "Offer",
        "priceCurrency": "{!Record.Offers.Currency}",
        "price": "{!Record.Offers.Price}"
    },
    "image": "{!Record.ProductMedia.DefaultImage}"
},
{
    "@context": "https://schema.org",
    "@type": "BreadcrumbList",
    "itemListElement": "{!Record.BreadcrumbList}"
}]
</script>
```

Validate Structured Data

Product structured data is surfaced in test environments, such as a sandbox, trial, or Developer Edition orgs. To validate structured data in a test environment, inspect the HTML source code for a page and navigate to the `<script>` tags containing the JSON-LD data as shown in the example.

In production environments, product structured data is only surfaced to select bot user-agents. To view your store's structured data in a production org, you can mimic a search engine user-agent string such as googlebot or bing using a user-agent switcher. Perform a manual snapshot refresh before validating structured data in a production org. For a full list of bots allowed to crawl Experience Builder sites, see SEO for Experience Builder Sites FAQ.

SEE ALSO:

- Product Variations and Attributes
- SEO Guidelines for Commerce Page Meta Tags

Manage the Store Sitemap

Sitemaps for B2B and D2C stores improve SEO by giving search engines structured information for more efficient indexing. Like other Experience Builder sites, B2B and D2C stores automatically refresh their sitemaps weekly. You can also generate a manual sitemap refresh every 24 hours.

Warning: Sitemap generation fails if your default site language is unavailable in the webstore. When configuring your store's language, the default language that you select in Experience Builder must be the same as the default language you selected on the Administration tile for the store.

SEE ALSO:

Generate a Manual Sitemap Refresh for Your Experience Cloud Site

Configure Store Language, Currency, and Tax

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Store Snapshots for SEO

To improve SEO performance, B2B and D2C stores provide web crawlers with SEO optimized HTML using the Content Snapshot service.

Salesforce takes a snapshot of your site's publicly available pages including localized pages every 15 days. When you add new pages to your site, snapshots of these are included in an incremental snapshot update every 24 hours. You can also take snapshots manually every 24 hours. For example, if you update a page's content with time-sensitive information, such as price changes for a flash sale, you can take a manual snapshot instead of waiting for the automatic update.

SEE ALSO:

Provide Search Engines with Fresh Content Snapshots

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Commerce Einstein

Commerce Einstein uses AI to automate tasks and personalize customer shopping experiences.

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What Is Commerce Einstein?

Commerce Einstein provides AI-powered merchandising tools to enhance the shopper experience.

Enable Commerce Einstein

Commerce Einstein features personalize shopper experiences, increase merchandiser productivity, and improve conversion. Enable Commerce Einstein so that merchandisers can turn on storefront activity tracking, turn on semantic search, and configure Einstein recommendations. Commerce Einstein deployment can take up to 24 hours to complete.

Tracked Data

Commerce Einstein uses cookies and session storage objects to store and track browser activities. It uses this information to tailor customer experiences. Some cookies are essential, and some are functional. Essential cookies are necessary for a site to work correctly and can't be disabled. Commerce Einstein uses functional cookies and tracked API activities to personalize shopper data.

Add a Content Security Policy (CSP) Trusted Site for the Commerce Einstein Domain

Before you turn on storefront activity tracking and semantic search, add a trusted URL for the Commerce Einstein domain.

Storefront Activity Tracking

Storefront activity tracking captures browser-based, real-time customer activities on your storefront, unless settings are explicitly changed by the customer.

Semantic Search

Semantic search improves search results by matching and returning items that are semantically related to a query.

Set Up Einstein Search Suggestions

With Einstein search suggestions, customers see relevant search terms before they finish entering their own. Relevance is based on a customer's recent search history and the popular search terms that were used by similar customers. Customers see search suggestions when they click the Search field and as they enter a search term. Search suggestions appear below the Search field. Einstein search suggestions aren't available for a store's guest users.

Preconfigured Commerce Einstein Recommendations for D2C Stores

When you use a D2C Commerce site template to create a D2C store, Commerce Einstein adds recommendations to certain pages in Experience Builder. These preconfigured recommendations are based on the most-common and top-performing use cases across Commerce Cloud.

Reindex Commerce Einstein

Changes to your store's product catalog are automatically sent to Commerce Einstein every 7 days, but you can manually reindex after making changes. Reindexing can take up to 24 hours to complete.

Einstein and Data Usage in Commerce Cloud

As an Einstein customer, it is important for you to know what data is being used in B2C Commerce, B2B Commerce, and D2C Commerce products. This table lists the data that is used by each feature.

What Is Commerce Einstein?

Commerce Einstein provides AI-powered merchandising tools to enhance the shopper experience.

After you enable Commerce Einstein, you can turn on storefront activity tracking and semantic search, and configure Einstein recommendations for your store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Features	Description
Storefront activity tracking	Enables Commerce Einstein to gather client- and server-side customer activity on your storefront. Commerce Einstein uses these metrics as real-time input for personalizing the shopper experience. You can opt out of storefront activity tracking for each store.
Semantic search	Enables Commerce Einstein to improve search results by matching and returning items that are semantically related to a query. You can opt out of semantic search for each store.

Features	Description
Einstein recommendations	Personalizes the D2C shopping experience by automating product discovery on your storefront.

SEE ALSO:

- Enable Commerce Einstein
- Storefront Activity Tracking
- Semantic Search
- Einstein Recommendations Component (LWR) for D2C Stores

Enable Commerce Einstein

Commerce Einstein features personalize shopper experiences, increase merchandiser productivity, and improve conversion. Enable Commerce Einstein so that merchandisers can turn on storefront activity tracking, turn on semantic search, and configure Einstein recommendations. Commerce Einstein deployment can take up to 24 hours to complete.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Before you enable Commerce Einstein:

- Assign a catalog to your store.
- Assign categories to your products.
- In Einstein Recommendations, activate all the products that you want to use.
- Set your organization-wide sharing value for Product object default internal access to either **Public Read** or **Public Read/Write**.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then select **Commerce Einstein**.
3. Turn on **Commerce Einstein**.
   The Status bar indicates that the deployment has started. When Commerce Einstein is processing the catalog and Einstein data, these errors can occur.

Error Type	Resolution
Catalog error	Confirm your store catalog assignment and product activation, and then click **Reindex**. If the issue persists, contact Salesforce Customer Support.
Internal error	Reprocess the data by clicking **Reindex**.

Error Type	Resolution
	If the issue persists, contact Salesforce Customer Support.

SEE ALSO:

- What Is Commerce Einstein?
- Reindex Commerce Einstein
- Storefront Activity Tracking
- Semantic Search
- Einstein Recommendations Component (LWR) for D2C Stores

Tracked Data

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Commerce Einstein uses cookies and session storage objects to store and track browser activities. It uses this information to tailor customer experiences. Some cookies are essential, and some are functional. Essential cookies are necessary for a site to work correctly and can't be disabled. Commerce Einstein uses functional cookies and tracked API activities to personalize shopper data.

Commerce Einstein supports third-party cookie consent banner integration (for example, CookiePro by OneTrust). Depending on how consent is configured with these third-party integrations, customers must opt in to use functional cookies to personalize the shopping experience with Commerce Einstein. If shoppers don't have a way to opt in to use functional cookies, the site doesn't personalize the consumer experience using Commerce Einstein.

Depending on the use cases applied, Commerce Einstein can continue generating recommendations for a shopper using data from other customers that have browsed or made purchases on the site.

When a customer accepts cookies, the cookies remain in the browser until they expire or until the customer deletes them.

Note: All described cookies and API requests have a lifespan of 1 year unless the customer deletes them.

Commerce Einstein uses the `cqcid` cookie when tracking storefront activity.

Data Object	Supported Products	Party	Cookie Type	Description
cqcid	D2C Commerce	First	Functional	Unique value for an unregistered buyer or shopper

Commerce Einstein uses these API requests when tracking storefront activity.

Data Object	Supported Product	Client Side or Server Side	How Commerce Einstein Tracks
viewProduct	D2C Commerce	Client	When a customer views a product page

Data Object	Supported Product	Client Side or Server Side	How Commerce Einstein Tracks
viewReco	D2C Commerce	Client	When a recommendation appears on a page Note: Commerce Einstein doesn't track whether a customer scrolls to view a recommendation.
clickReco	D2C Commerce	Client	When a customer clicks an Einstein recommendation
viewSearch	B2B Commerce	Client	When a customer views a product listing page
clickSearch	B2B Commerce	Client	When a customer clicks a product on the product listing page
addToCart	D2C Commerce	Client	When a customer adds a product to their cart
finishCheckout	D2C Commerce	Server	A customer's purchase at time of order confirmation

SEE ALSO:

Experience Cloud Cookies

What Is Commerce Einstein?

Enable Commerce Einstein

Enable Storefront Activity Tracking

Enable Semantic Search for Commerce

Einstein Recommendations Component (LWR) for D2C Stores

Add a Content Security Policy (CSP) Trusted Site for the Commerce Einstein Domain

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Before you turn on storefront activity tracking and semantic search, add a trusted URL for the Commerce Einstein domain.

1. Add a trusted URL with these settings.
   a. For URL, enter `https://api.cquotient.com`.
   b. In the Content Security Policy (CSP) Settings section, for context, select **All**.
   c. Select the **connect-src (scripts)** CSP directive.
   d. Select the **img-src (images)** CSP directive.

SEE ALSO:

Enable Commerce Einstein

Enable Storefront Activity Tracking

Enable Semantic Search for Commerce

Storefront Activity Tracking

Storefront activity tracking captures browser-based, real-time customer activities on your storefront, unless settings are explicitly changed by the customer.

Enable Storefront Activity Tracking

Storefront activity tracking captures browser-based, real-time buyer or shopper activities in your store, unless settings are explicitly changed by the buyer or shopper. Storefront activity tracking requires a Content Security Policy (CSP) trusted site for the Commerce Einstein domain.

Commerce Cloud Cookies

Stores use cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the store. In addition to these Commerce-specific cookies, stores can use cookies that apply to all Experience Cloud sites.

Enable Storefront Activity Tracking

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Storefront activity tracking captures browser-based, real-time buyer or shopper activities in your store, unless settings are explicitly changed by the buyer or shopper. Storefront activity tracking requires a Content Security Policy (CSP) trusted site for the Commerce Einstein domain.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Commerce Einstein**.
3. Turn on **Commerce Einstein** and **Storefront Activity Tracking**.

SEE ALSO:

Add a Content Security Policy (CSP) Trusted Site for the Commerce Einstein Domain

Enable Commerce Einstein

Tracked Data

Commerce Cloud Cookies

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Stores use cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the store. In addition to these Commerce-specific cookies, stores can use cookies that apply to all Experience Cloud sites.

Salesforce doesn't currently provide functionality for end-user cookie consent management. The platform is compatible with many existing third-party solutions. We recommend that you work with your internal IT teams or consult your implementation partners to identify the right solution for your organization's needs.

Cookies are divided into required, functional, and marketing. Functional cookies include preferences and statistics.

- **Required**: Strictly necessary to browse the website and to use its features.

- **Functional: Preferences**: Used by the website to remember choices made previously. Language settings are an example of a preference type cookie.
- **Functional: Statistics**: Used to collect information about how a website is used, including links clicked and which pages users visited.
- **Marketing**: Used to track online activity for a more personalized experience, including relevant advertisement.

This table describes the Commerce Cloud cookies collected by Salesforce. For additional cookies, see Experience Cloud Cookies.

Cookie Name	Duration	Cookie Type	Description
`cqcid`	1 year	Functional: Statistics	Provides a unique value for an unregistered buyer or shopper. Used by Commerce Einstein to track activity. For more information, see Tracked Data.
`GuestCartSessionId_{storeId}`	7 days or custom guest cart expiration time	Functional: Statistics	Provides a unique ID for a guest user's cart session. For more information, see Enable Guest Access to a Store.
`guest_uuid_essential_{siteId}`	1 year	Required	Provides a unique ID for guest users in Experience Cloud sites. Expires one year after the user's last visit to the site.

SEE ALSO:

Experience Cloud Cookies

Storefront Activity Tracking

Enable Semantic Search for Commerce

Semantic Search

Semantic search improves search results by matching and returning items that are semantically related to a query.

Enable Semantic Search for Commerce

Semantic search improves your search results by matching and returning items that are semantically related to a query. Semantic search requires a Content Security Policy (CSP) trusted site for the Commerce Einstein domain.

AI-Powered Search for Commerce

Improve store search experiences with Einstein semantic search. Einstein semantic search reduces the occurrence of “no results found” pages, lowers bounce rates by providing a smoother shopping experience, and improves conversion rates. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternate spellings, abbreviations, typos, and product themes.

Enable Semantic Search for Commerce

Semantic search improves your search results by matching and returning items that are semantically related to a query. Semantic search requires a Content Security Policy (CSP) trusted site for the Commerce Einstein domain.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.

   Make sure that your store uses the default sorting for search results.

2. Select **Settings** > **Store**, and then click **Commerce Einstein**.
3. Turn on **Commerce Einstein** and **Semantic Search**.
4. After you turn on semantic search, update your search index.

SEE ALSO:

- Add a Content Security Policy (CSP) Trusted Site for the Commerce Einstein Domain
- Enable Commerce Einstein
- AI-Powered Search for Commerce
- Update the Commerce Search Index

AI-Powered Search for Commerce

Improve store search experiences with Einstein semantic search. Einstein semantic search reduces the occurrence of "no results found" pages, lowers bounce rates by providing a smoother shopping experience, and improves conversion rates. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternate spellings, abbreviations, typos, and product themes.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Einstein semantic search populates the search results page by matching and returning terms that are semantically related to a query. When you query for product bundles, search results only match queries for the bundle's parent product. Einstein semantic search uses exact queries for product SKUs.

With Einstein semantic search, your store is better equipped to handle a range of customer queries.

Query Entry	Example
Synonyms	`Couch` and `sofa`
Alternative spellings	`Adapter` and `adaptor`
Abbreviations	`AC` and `Air Conditioner`
Slang	`Men's shades`
Misspellings	`Shert` and `shirt`
Product themes	`Wedding gift`

Query Entry	Example
Product features	`Long USB cable`
Product types	`Women's jackets`
Related products	`20" TV` and `21" TV`

You'll notice improvements in how Einstein semantic search associates search terms to product themes. For example, if a customer enters `wedding gift`, Einstein semantic search can associate the product theme to items such as `dishware sets` or `bedding`.

Because each store has unique catalogs and customer behavior, improvements vary. For example, gains are especially apparent in a store where customers more frequently search for broad terms like `furniture` or `couch` rather than exact queries like product SKU.

Note: When you use Einstein semantic search, ensure that you sort by **Best Match** to return the expected results.

SEE ALSO:

- Enable Commerce Einstein
- Enable Semantic Search for Commerce
- Considerations for Product Searchability
- Languages Supported for Search Results

Set Up Einstein Search Suggestions

With Einstein search suggestions, customers see relevant search terms before they finish entering their own. Relevance is based on a customer's recent search history and the popular search terms that were used by similar customers. Customers see search suggestions when they click the Search field and as they enter a search term. Search suggestions appear below the Search field. Einstein search suggestions aren't available for a store's guest users.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

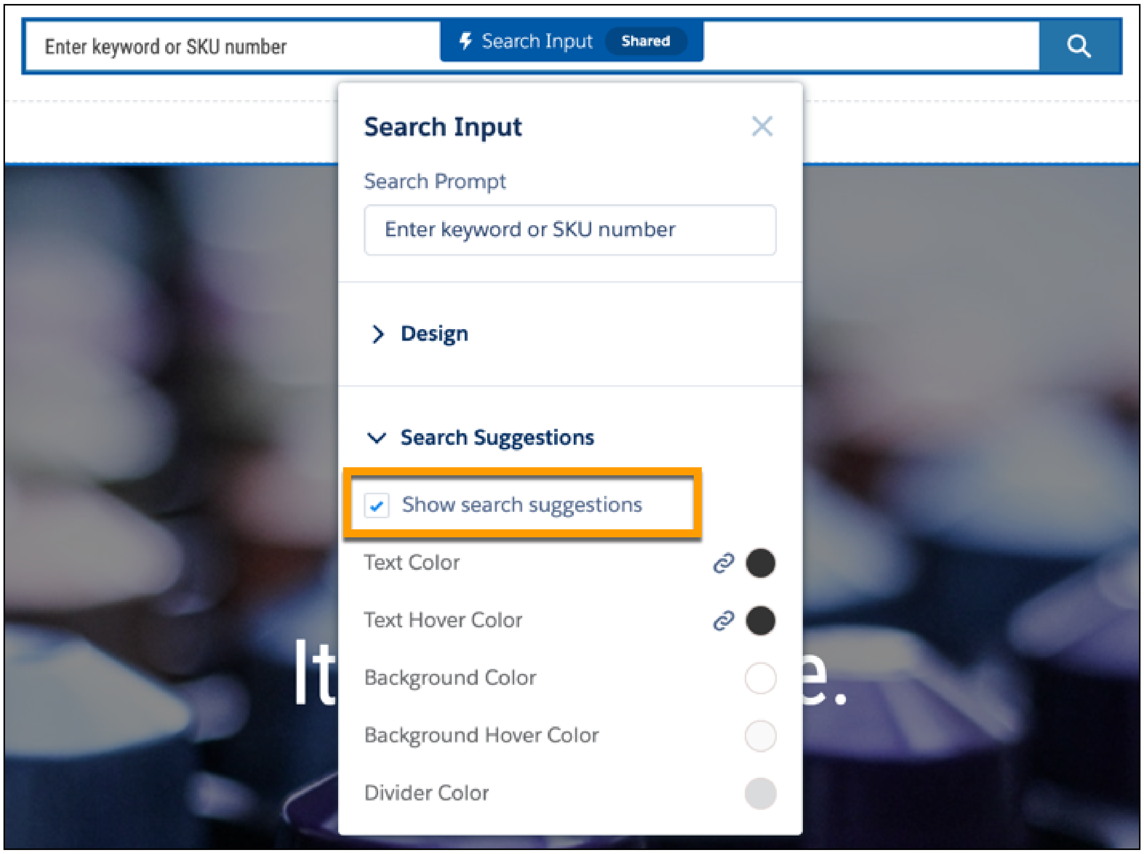
Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before you set up Einstein Search Suggestions:

- Deploy Commerce Einstein
- Enable Storefront Activity Tracking

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. On any page where it appears, select the **Search Input** component. If you're using a D2C store with the Search Bar component, update to the latest D2C Commerce (LWR) template, delete the Commerce Header component, and add a new Commerce Header component to use the Search Input component. For more information, see Update Your Experience Builder Site's Template.

   When you configure one Search Input component, the settings apply to all Search Input components in the store.
4. In the Search Suggestions section, select **Show search suggestions**.



Search Input

Search Prompt: Enter keyword or SKU number

☑ Show search suggestions

5. Publish your store.

SEE ALSO:

- Considerations for Product Searchability
- Enable Commerce Einstein
- Enable Storefront Activity Tracking
- Enable Semantic Search for Commerce

Preconfigured Commerce Einstein Recommendations for D2C Stores

When you use a D2C Commerce site template to create a D2C store, Commerce Einstein adds recommendations to certain pages in Experience Builder. These preconfigured recommendations are based on the most-common and top-performing use cases across Commerce Cloud.

You can edit and remove default recommendations components, or add additional recommendations components to pages.

Page	Header Text	Anchor	Use Case
Home	Top Sellers	No Anchor	Top Selling
	Recommendations for You	No Anchor	Personalized for Shopper

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Page	Header Text	Anchor	Use Case
Cart	Customers Also Bought	Products in Cart	Upsell
Category	Top Selling in Category	Category Viewed	Top Selling by Category
	Most Viewed in Category	Category Viewed	Most Viewed by Category
Profile	Recently Viewed	No Anchor	Recently Viewed
Product	Similar Products	Product Viewed	Similar Products
	Complementary Products	Product Viewed	Complementary Products
Search	Recommendations for You	No Anchor	Personalized by Shopper

SEE ALSO:

What Is Commerce Einstein?

Enable Commerce Einstein

Einstein Recommendations Component (LWR) for D2C Stores

Reindex Commerce Einstein

Changes to your store's product catalog are automatically sent to Commerce Einstein every 7 days, but you can manually reindex after making changes. Reindexing can take up to 24 hours to complete.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

These changes require rebuilding the Commerce Einstein index before they're available to shoppers:

- Updating products in the store's catalog
- Changing the category hierarchy structure
- Adding or removing categories from the category hierarchy structure
- Updating category names
- Adding or updating the products in an entitlement policy
- Changing the geolocation of your organization
- Removing or changing the name of a custom field on the Product2 object

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Commerce Einstein**.
3. In the Commerce Einstein section, click **Reindex**.

A message appears under the status bar to indicate that the reindex process has started.

SEE ALSO:

Create a Catalog and Assign It to a Store

What Is Commerce Einstein?

Commerce Einstein

Einstein Recommendations Component (LWR) for D2C Stores

Einstein and Data Usage in Commerce Cloud

As an Einstein customer, it is important for you to know what data is being used in B2C Commerce, B2B Commerce, and D2C Commerce products. This table lists the data that is used by each feature.

The table lists the customer data that's submitted by the Customer to Salesforce Services as defined in the Main Services Agreement (MSA). The table also indicates which features use global models trained on Customer Data and the usage data that is used, which is data relating to users interactions with Salesforce. Data submitted to an Einstein feature may be used to train AI models, to improve your services and features, or to develop new features that you will have access to without additional cost. These models look for aggregated trends across multiple Salesforce Customers. If an Einstein feature uses a global model, the Customer can opt out of the global model and have control over whether their data contributes to global models.

The Customer has control over whether their data contributes to global models. Contact our Commerce Cloud Support team to manage how your data is used.

Global model types for Commerce Cloud

- Catalog Global Model
  - Machine learning model that works across catalogs of different customers. It pools together catalogs to better classify products or attributes of the products. This model uses the fields in the product catalogs (including name, description, primary category, category list, price, and custom attributes) and assets that are linked to in the product catalog (e.g., images).
  - This model is trained across Commerce Cloud customers that have not opted out of global modeling of catalogs. The Catalog Global Model will be used for customers that have opted out, but their data will not be used to train the model.
- Shopper Global Model
  - Machine learning model that combines shopper activities across stores of different customers to learn how to better predict, e.g., future shopper behavior, for better targeting.
- Merchant Global Model
  - Machine learning model that shares merchant activity/settings between customers, e.g., search dictionaries – Einstein suggests synonyms for generic product names based on cross-Merchant search activity. So, for instance, when a user searches for "couch" they also see "sofa".

The Customer has control over whether their data contributes to global models. Contact our Commerce Cloud Support team to manage how your data is used.

Note: * Not all recommendation strategies use the Catalog Global Model. This applies to the Einstein Product Recommendations feature for B2C Commerce, B2B Commerce, and D2C Commerce.

Cloud or Package	Feature	Customer Data and Salesforce Objects Used	Uses Catalog Global Model	Uses Shopper Global Model	Uses Merchant Global Model
B2C Commerce	Einstein Product Recommendations	Shopper activity tracking and catalog data	Yes*	No	No
	Complete the Set	Shopper activity tracking and catalog data	Yes	No	No
	Einstein Commerce Insights	Shopper activity tracking and catalog data	No	No	No
	Einstein Search Suggestions	Shopper activity tracking and catalog data	No	No	No
	Einstein Predictive Sort	Shopper activity tracking and catalog data	Yes	No	No
	Einstein Dictionary Management	Shopper activity tracking and synonym dictionaries	No	No	Yes
B2B Commerce	Einstein Product Recommendations	Shopper activity tracking and catalog data	Yes*	No	No
	Einstein Semantic Search	Shopper activity tracking and catalog data	Yes	No	No
	Catalog Recommendations	Catalog data	No	No	No
D2C Commerce	Einstein Product Recommendations	Shopper activity tracking and catalog data	Yes*	No	No
	Einstein Semantic Search	Shopper activity tracking and catalog data	Yes	No	No
	Category Recommendations	Catalog data	No	No	No

Agentforce for Commerce

Use the power of generative AI to drive more personalized communication with customers and help merchants drive greater shopper conversion. Agentforce Merchant Agent streamlines merchandising tasks and improves business outcomes through insights.

Merchant Agent for Commerce

Use Merchant Agent to reduce store creation time to value and grow revenue through data-driven shopper insights. Communicate with Einstein using natural language with fewer clicks and more precision.

SEE ALSO:

Agentforce Agents

What are Agents?

Merchant Agent for Commerce

Use Merchant Agent to reduce store creation time to value and grow revenue through data-driven shopper insights. Communicate with Einstein using natural language with fewer clicks and more precision.

Enablement Overview

To launch Merchant Agent, first review Considerations for Merchant Agent on page 211 for information about important limitations and support. Next, Enable Merchant Agent to tap into the required generative AI capabilities and features. Then, Add Merchant Agent on page 214 topics to enable the actions the agents use to help you with your store. Lastly, test, provide access, and activate the agent in Launch Merchant Agent on page 214.

Use Cases

Admins and merchandisers can use Merchant Agent in their every day tasks in a variety of ways. Here are some examples.

Example: Sally, a merchandiser for CRG Brands, wants to create a promotion for the company's web store. She decides to use Agentforce to help her quickly draft a promotion as part of a Halloween campaign. She asks the agent to:

"Create a promotion for the Testa Rossa coffee machine, where the discount is 25% on all orders valid until October 31, 2024."

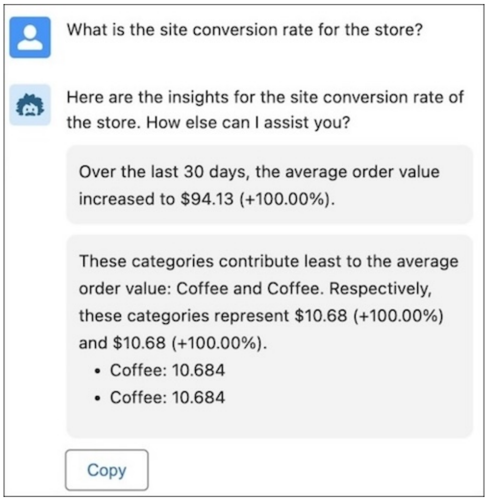
Merchant Agent uses that utterance and the actions from the Commerce Promotions topic to create a template for the promotion. Together, Sally and the agent fine-tune the promotion using natural language. Sally reviews the promotion, and pleased with the results, she activates it.

Example: Sally wants to understand some of the KPIs for the web store in a more meaningful way. She turns again to her trusty agent and says:

"Show me the insights for the average order value for this web store."

Merchant Agent uses that utterance and the actions from the Insights Business Objectives topic to retrieve the requested data. Sally receives the KPI and Insight Summary and, based on that information, decides the best coarse of action to move her organizational goals forward.

Example: Sally wants to know how the store is performing when it comes purchases, so she asks the agent about site conversion.



What is the site conversion rate for the store?

Here are the insights for the site conversion rate of the store. How else can I assist you?

Over the last 30 days, the average order value increased to $94.13 (+100.00%).

These categories contribute least to the average order value: Coffee and Coffee. Respectively, these categories represent $10.68 (+100.00%) and $10.68 (+100.00%).

- Coffee: 10.684
- Coffee: 10.684

She learns valuable metrics that help her make decisions about marketing tactics, possible promotions, and inventory.

Considerations for Merchant Agent

Keep these considerations in mind when using Merchant Agent.

Enable Merchant Agent

Use the power of Merchant Agent to help you be more productive, eliminate the need to navigate to screens, fill in values, and take action. Activate Einstein generative AI features and other required features and tasks to power up your productivity.

Add Merchant Agent Topics

Add topics to define what you want Merchant Agent to do. The promotions topic helps you craft promotions that meet your business needs. The business insights topic retrieves helpful insights into your store.

Launch Merchant Agent

Before launching an agent, test it to ensure good performance. After Merchant Agent is live, depending on the topics you selected, the agent can help you create promotions or get insights about how to improve KPIs.

Considerations for Merchant Agent

Keep these considerations in mind when using Merchant Agent.

EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2B or D2C Commerce

Language and Locale Support

This feature supports English in these locales.

Locale	Code
Locale1	en_LO
Locale2	en_LO

Large Language Model Support

This feature supports these models. For more information about LLM support for the AI agents platform and reasoning engine, see Considerations for Agents.

Model
OpenAI GPT-4 Turbo

Einstein Trust Layer Service Support

This feature supports these Trust Layer services.

Service	Description
Dynamic Grounding with Secure Data Retrieval	Not required
Prompt Defense (System policies and prompt injection detection)	Supported by the Platform (Employee Agent)
Data Masking	Not supported
Toxicity Detection	Supported (default from the platform)
Audit and Feedback	Supported (default from the platform)

Region Support

Merchant Agent doesn't require geo-aware LLM request routing as described in Geo-Aware LLM Request Routing on the Einstein Generative AI Platform.

Feature and Einstein Requests Usage

Einstein Requests is a usage metric for generative AI. The use of generative AI capabilities in either a production or sandbox environment consumes Einstein Requests and possibly Data Cloud credits. To learn more, see Einstein Usage.

Feature Limits

Rate Limits for LLM and LLM Credits are available for execution for an extra charge.

SEE ALSO:

- Einstein Trust Layer
- Einstein Audit and Feedback Data
- Einstein Generative AI Supported Languages and Locales
- Large Language Model Support

Enable Merchant Agent

EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2B or D2C Commerce

Use the power of Merchant Agent to help you be more productive, eliminate the need to navigate to screens, fill in values, and take action. Activate Einstein generative AI features and other required features and tasks to power up your productivity.

Before you turn on Merchant Copilot, contact your Salesforce representative to enable these add-on licenses:

- CdpSegmentsActivationsCard
- ChatbotEnabled
- EinsteinGPTPlatformAddOn
- EinsteinGPTCopilotAddOn
- EinsteinGPTPromptBuilderAddOn
- GenieDataPlatformStarter
- EinsteinGPTCommerceAddOn

1. See Enable Einstein generative AI to complete these tasks.
    a. Set up Data Cloud.
    b. Turn on Einstein Generative AI.
    c. Set up the Einstein Trust Layer.
    d. Turn On Einstein Data Collection and Storage.
2. If you don't already have a Commerce store set up, see Set Up a Commerce Store on page 22.
3. Enable Einstein Bots.
    a. At the top of the page, click ⚙ and select **Setup**.
    b. In the Quick Find box, enter `Einstein Bots`, and then select **Einstein Bots**.
    c. Turn on Einstein Bots.
4. Enable Einstein Copilot.
    a. At the top of the page, click ⚙ and select **Setup**.
    b. In the Quick Find box, enter `Agents`, and then select **Agents**.
    c. Turn on Einstein Copilot for Salesforce.

Select agent topics and actions to help you complete tasks, create promotions, and grow revenue through data-driven store insights. See Add Merchant Agent Topics on page 214.

SEE ALSO:

Select Which Objects to Always Search in Global Search

Chat with Customers with Einstein Bots

Add Merchant Agent Topics

EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2B or D2C Commerce.

Add topics to define what you want Merchant Agent to do. The promotions topic helps you craft promotions that meet your business needs. The business insights topic retrieves helpful insights into your store.

Each topic encompasses a unique set of abilities that allows the agent to address various needs within that area effectively. Learn more about Agent Topics.

1. At the top of the page, click ⚙ and select **Setup**.
2. In the Quick Find box, enter `Agents`, and then select **Agents**.
3. Select an agent, or create an agent.
4. On the Agent Details page, click **Open in Builder**.
5. In the Topics component, select **Add From Asset Library** from the dropdown. If the dropdown is disabled, deactivate the Copilot and try again.
6. Select one or both of these topics.
   - To create promotions and access templates, select **Commerce Promotions**.
   - To get recommendations to improve Key Performance Indicators (KPI) based on your store's data, select **Insights Business Objectives**.
7. Click **Finish**.

Next, Launch Merchant Agent on page 214.

SEE ALSO:

Customize Your Agents with Topics and Actions
Explore Standard Agent Topics and Actions
Add a Topic from the Asset Library
Agent Topic: Commerce Promotions
Agent Topic: Insights Business Objectives

Launch Merchant Agent

EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2B or D2C Commerce

Before launching an agent, test it to ensure good performance. After Merchant Agent is live, depending on the topics you selected, the agent can help you create promotions or get insights about how to improve KPIs.

1. Test the Merchant Agent actions.

   Test the agent to confirm that it understands a user's request or instruction and launches the correct actions. Review whether the responses are helpful and accurate.

   a. At the top of the page, click ⚙ and select **Setup**.
   b. In the Quick Find box, enter `Agents`, and then select **Agents**.
   c. Select an existing agent.
   d. On the Agent Details page, click **Open in Builder**.
   e. Test the agent actions.

In the Conversation Preview window, enter some text in the dialog box. Use natural language to try out Commerce Promotions and Insights Business Objectives topics.

- **f.** Follow the prompts from Einstein as you fine-tune your request.
- **g.** Review the list of actions taken to get the response. Continue this process until you've reviewed the necessary test cases to ensure a good experience for agent users.

2. Decide who can use the Merchant Agent. See Give Users Access to Einstein Copilot.
3. When you're ready, activate the agent.

   After the agent is activated, it's immediately available to the users who you've given access to.
4. To interact with the agent, click the Einstein logo in Lightning and type a phrase, also known as an utterance, to get started.

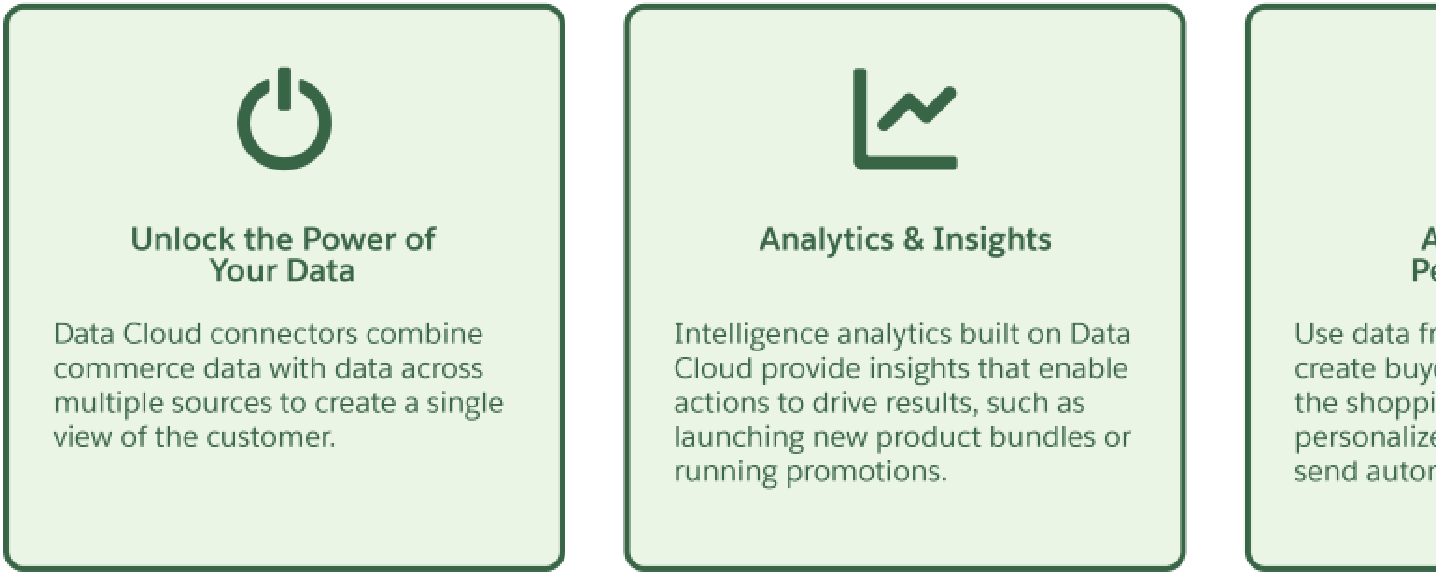
   Not sure what to say? To get you started, check out the Commerce Promotions and Insights Business Objectives references for sample utterances.

SEE ALSO:

Trailhead: Test and Activate a Copilot

Data Cloud for Commerce

By combining the power of Data Cloud and Commerce Cloud, you can gain key business insights and unlock valuable analytics, personalization, and automation capabilities to provide connected, personalized experiences to your customers.



Unlock the Power of Your Data

Data Cloud connectors combine commerce data with data across multiple sources to create a single view of the customer.

Analytics & Insights

Intelligence analytics built on Data Cloud provide insights that enable actions to drive results, such as launching new product bundles or running promotions.

A
Pe

Use data fr
create buy
the shoppi
personalize
send autor

Data Cloud for Commerce Considerations and Requirements

When you set up Data Cloud for Commerce, you must have certain permissions and requirements configured.

Set Up Data Cloud for Commerce

Follow the setup instructions specific to your Commerce type.

Intelligence Analytics Dashboards Powered by Data Cloud

Intelligence Analytics dashboards display key store performance metrics to help you make data-driven decisions for business agility. Get a comprehensive view of the best performing categories and products within a store, and keep on top of inventory health across your locations and location groups. Explore the Shopper Intelligence dashboard to learn about customer first-time and repeat purchase behavior to drive and retain loyalty.

Personalization Powered by Data Cloud

Personalize the shopper experience and enhance customer engagement by using Data Cloud segments.

Data Cloud for Commerce Considerations and Requirements

When you set up Data Cloud for Commerce, you must have certain permissions and requirements configured.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To manage Data Cloud:
- Data Cloud Admin permission set

To manage Commerce Cloud:
- Commerce Cloud User permission set

To install Data Cloud for Commerce:
- Commerce Intelligence Admin permission set

To use Data Cloud for Commerce:
- Commerce Intelligence User permission set

CRM Analytics Requirements

The included CRM Analytics apps and templates are available only in English.

Intelligence Analytics Dashboards Requirements

To view data in the Intelligence Analytics dashboards, you must have the features associated with the dashboards configured and populated with data.

- Dashboard components that display product performance—To include newly launched product data, activate the products and track orders, and then refresh the Commerce data streams and data transforms. See Data Stream Schedule in Data Cloud.
- Dashboard components that display searches—Viewing search information requires an active site and some available searches from existing individuals. See Data Stream Schedule in Data Cloud.
- Inventory Intelligence dashboards—Upgrade to the latest version of the Commerce data kit to access the Omnichannel Inventory data model objects. After you upgrade the data kit, Data Cloud starts to capture inventory data so that you can view inventory changes.
- Viewing product variations—The Inventory Intelligence Analytics dashboard includes product variations. See Add Product Variations and Attributes with Guided Setup.

Refresh Intelligence Analytics Dashboard Data

The Intelligence Analytics dashboards rely on up-to-date data by regularly refreshing the data. The refresh includes running the data transforms and updating the datasets.

Data Cloud for Commerce Assets

When you install the Commerce data kit in Data Cloud, all Data Cloud assets and data mappings are created. When you install Intelligence Analytics, the data transforms run, ingesting Data Cloud data and creating the CRM Analytics dashboards and components.

Refresh Intelligence Analytics Dashboard Data

The Intelligence Analytics dashboards rely on up-to-date data by regularly refreshing the data. The refresh includes running the data transforms and updating the datasets.

The Data Cloud data streams refresh hourly, updating the Commerce data model objects (DMO). The data transforms must be scheduled to process the new and updated DMO data and bring the data into CRM Analytics. You can schedule the app refresh during the installation of Intelligence Analytics.

You can manually schedule an individual data transform to run more frequently than hourly. It's recommended to set the refresh rate to 24 hours. If you do schedule jobs individually, disable the automatic data refresh to avoid overlapping job runs.

You can change the schedule or refresh the data as needed on the app management tab. See Change Your Intelligent App Settings.

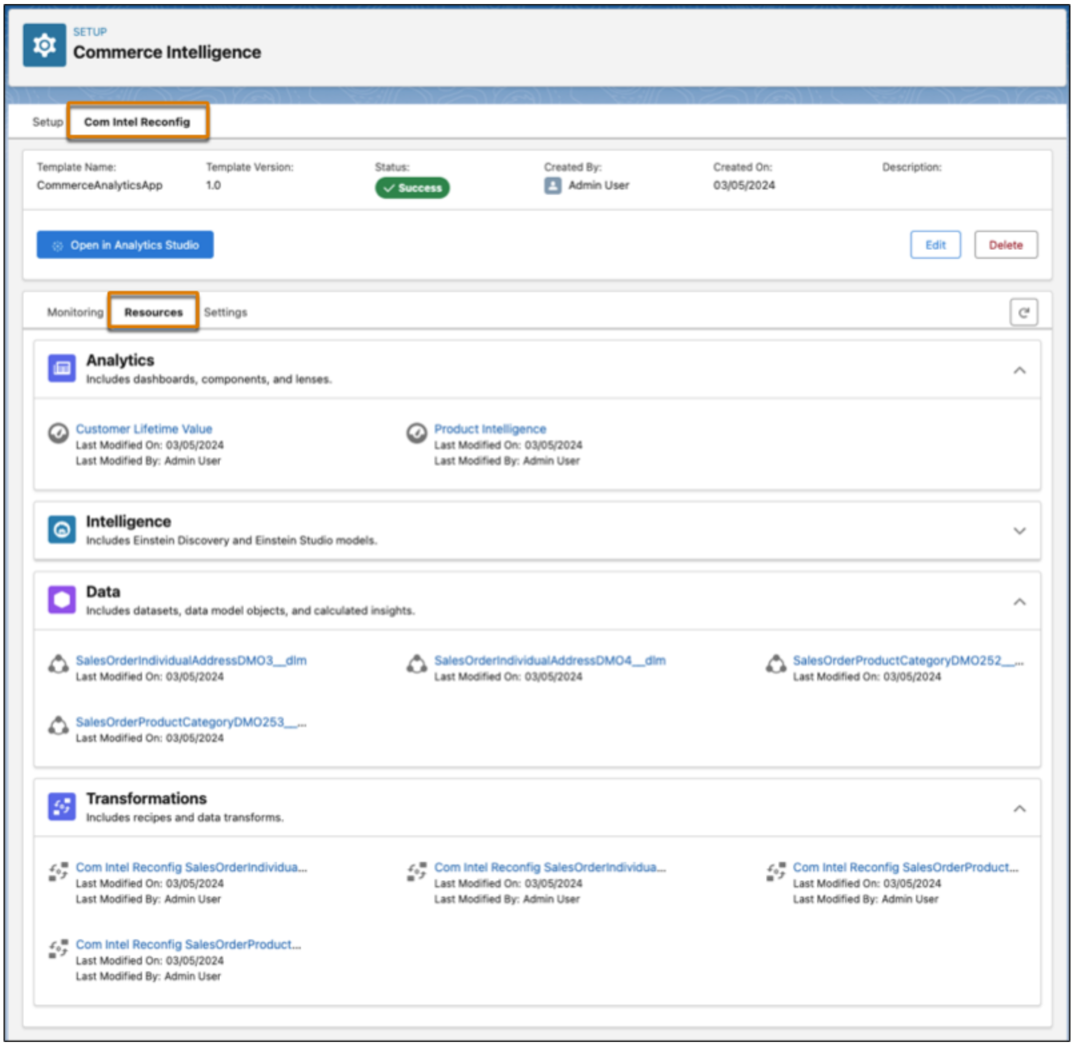
SEE ALSO:

Data Cloud for Commerce Assets

Data Cloud for Commerce Assets

When you install the Commerce data kit in Data Cloud, all Data Cloud assets and data mappings are created. When you install Intelligence Analytics, the data transforms run, ingesting Data Cloud data and creating the CRM Analytics dashboards and components.

The app assets are listed under Resources on the Setup page for your app after successful installation. These include Data Cloud data transforms and data model objects (DMO) and CRM Analytics dashboards and components. When you select an asset, it opens in its respective tool for detailed inspection.



Template Name: CommerceAnalyticsApp
Template Version: 1.0
Status: ✓ Success
Created By: Admin User
Created On: 03/05/2024
Description:

Analytics
Includes dashboards, components, and lenses.

Customer Lifetime Value
Last Modified On: 03/05/2024
Last Modified By: Admin User

Product Intelligence
Last Modified On: 03/05/2024
Last Modified By: Admin User

Intelligence
Includes Einstein Discovery and Einstein Studio models.

Data
Includes datasets, data model objects, and calculated insights.

SalesOrderIndividualAddressDMO3__dlm
Last Modified On: 03/05/2024

SalesOrderIndividualAddressDMO4__dlm
Last Modified On: 03/05/2024

SalesOrderProductCategoryDMO252__...
Last Modified On: 03/05/2024

SalesOrderProductCategoryDMO253__...
Last Modified On: 03/05/2024

Transformations
Includes recipes and data transforms.

Com Intel Reconfig SalesOrderIndividua...
Last Modified On: 03/05/2024
Last Modified By: Admin User

Com Intel Reconfig SalesOrderIndividua...
Last Modified On: 03/05/2024
Last Modified By: Admin User

Com Intel Reconfig SalesOrderProduct...
Last Modified On: 03/05/2024
Last Modified By: Admin User

Com Intel Reconfig SalesOrderProduct...
Last Modified On: 03/05/2024
Last Modified By: Admin User

SEE ALSO:

Refresh Intelligence Analytics Dashboard Data

Set Up Data Cloud for Commerce

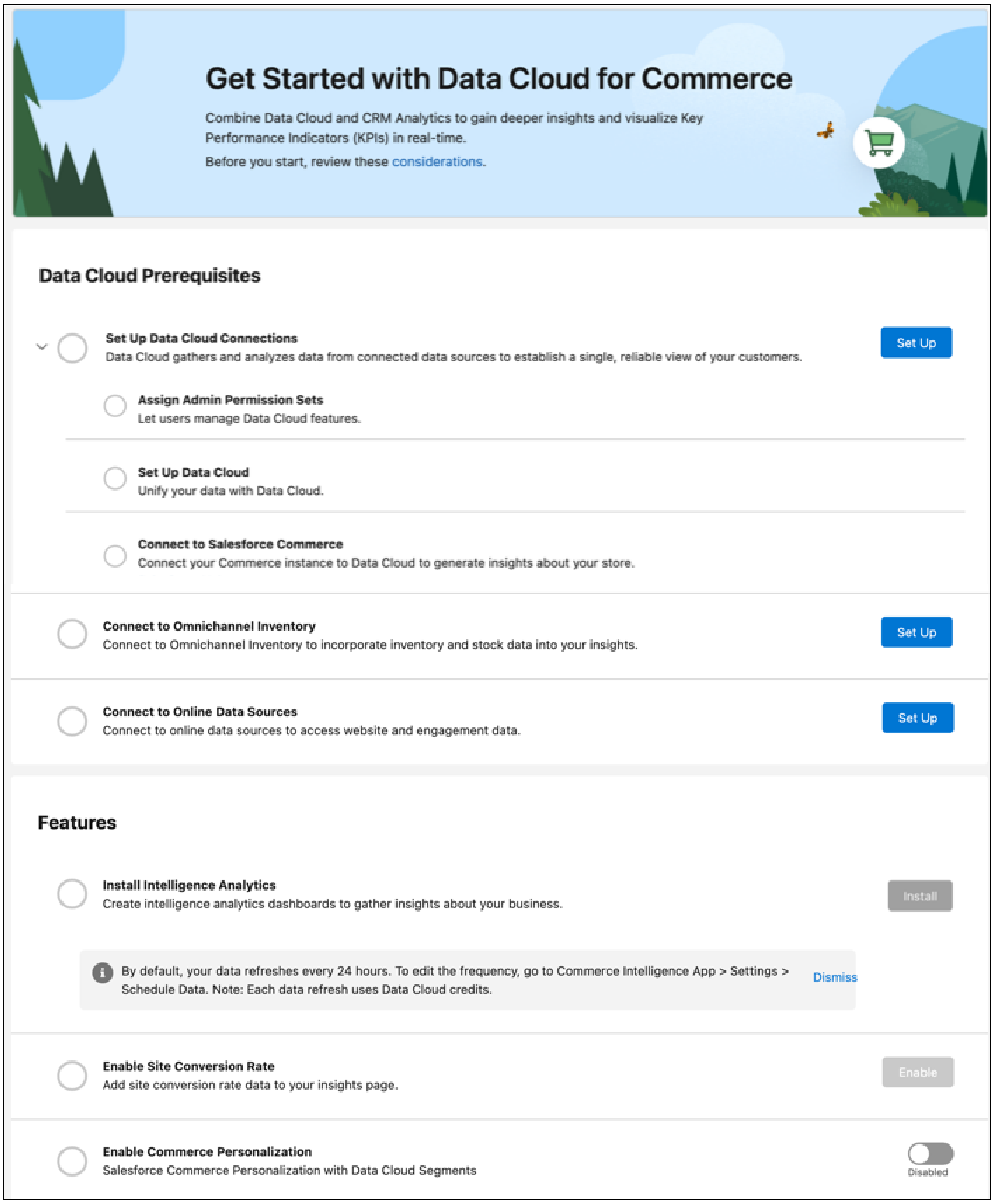
Follow the setup instructions specific to your Commerce type.

1. Set Up Data Cloud for Commerce for a B2B or D2C Store
   You must have a Commerce Intelligence Basic or Advanced license to set up Data Cloud for Commerce. If you encounter an error during setup, review your previous setup steps and retry the installation.
2. Set Up Data Cloud for Commerce for a B2C Store
   To set up Data Cloud for Commerce, you need Data Cloud and CommerceIntelligenceB2CE licenses.

Set Up Data Cloud for Commerce for a B2B or D2C Store

You must have a Commerce Intelligence Basic or Advanced license to set up Data Cloud for Commerce. If you encounter an error during setup, review your previous setup steps and retry the installation.

1. At the top of the page, click ⚙, and then select **Setup**.
2. In the Quick Find box, find and select **Commerce Setup Assistant**.
3. On the Salesforce Commerce Setup tile, click **Get Started**.
4. On the Basic Setup tab, expand Features, and enable **Commerce and Order Management**.
5. Click **Home** to return to the Commerce Setup Assistant home page.
6. On the Set Up Data Cloud for Commerce tile, click **Get Started**.



Get Started with Data Cloud for Commerce

Combine Data Cloud and CRM Analytics to gain deeper insights and visualize Key Performance Indicators (KPIs) in real-time.

Before you start, review these considerations.

Data Cloud Prerequisites

○ **Set Up Data Cloud Connections**
Data Cloud gathers and analyzes data from connected data sources to establish a single, reliable view of your customers.

○ **Assign Admin Permission Sets**
Let users manage Data Cloud features.

○ **Set Up Data Cloud**
Unify your data with Data Cloud.

○ **Connect to Salesforce Commerce**
Connect your Commerce instance to Data Cloud to generate insights about your store.

○ **Connect to Omnichannel Inventory**
Connect to Omnichannel Inventory to incorporate inventory and stock data into your insights.

○ **Connect to Online Data Sources**
Connect to online data sources to access website and engagement data.

Features

○ **Install Intelligence Analytics**
Create intelligence analytics dashboards to gather insights about your business.

By default, your data refreshes every 24 hours. To edit the frequency, go to Commerce Intelligence App > Settings > Schedule Data. Note: Each data refresh uses Data Cloud credits.

○ **Enable Site Conversion Rate**
Add site conversion rate data to your insights page.

○ **Enable Commerce Personalization**
Salesforce Commerce Personalization with Data Cloud Segments

7. Next to the Set Up Data Cloud Connections step, click **Set Up**.

   If you have an Enterprise or Unlimited edition, this step begins automatically. Click **Complete Setup** to finish the process.

   These permission sets are assigned to the currently logged in user: Data Cloud Admin, Commerce Intelligence Admin, and Einstein Analytics Admin. With these permissions, you can create data streams and access Data Cloud for Commerce features. Setup also configures Data Cloud and connects it to Commerce.

8. (Optional) To add inventory data to the dashboards, click **Set Up** for Connect to Omnichannel Inventory. This option is listed only if you have Omnichannel Inventory provisioned.

This step imports your Omnichannel Inventory data into Data Cloud and creates the necessary data streams and relationships between data model objects.

Connecting inventory data to your existing Intelligence Analytics setup overrides customizations to your dashboards. You can reapply the customizations after completing the setup.

9. (Optional) To add customer engagement data from your active stores to the dashboards, connect your web and mobile apps to Data Cloud.
    a. From Setup, in the Quick Find box, enter `Digital Experiences` and select **All Sites**.
    b. Select a site, and click **Builder**.
    c. In the website builder, click **Settings** and select **Integrations**.
    d. On the Data Cloud card, select **Add to Site**.
    e. Enable **Share site data with Data Cloud**, and save your changes.

       The integration process can take up to 60 minutes. You receive an email for confirmation when the setup is complete.
    f. When you receive your confirmation email, publish your site.
    g. If you're adding web and mobile app engagement data to your existing Intelligence Analytics setup, go to the Data Cloud for Commerce Setup page. In the Install Intelligence Analytics step, click **Update**.

    Connecting web and mobile app data to your existing Intelligence Analytics setup overrides customizations to your dashboards. You can reapply the customizations after completing this step.

10. Next to the Install Intelligence Analytics step, click **Install**.

    The installation takes several minutes. To view the status, refresh the page. When the installation is complete, click **View Intelligence Analytics** to access the Intelligence Analytics dashboards.

11. (Optional) To see the site conversion rate insights on the Insights Overview page, click **Configure** for the Configure Site Conversion Rate step.

12. (Optional) If you have buyer groups based on Data Cloud segments and want to create targeted content on your storefront, enable **Commerce Personalization**.

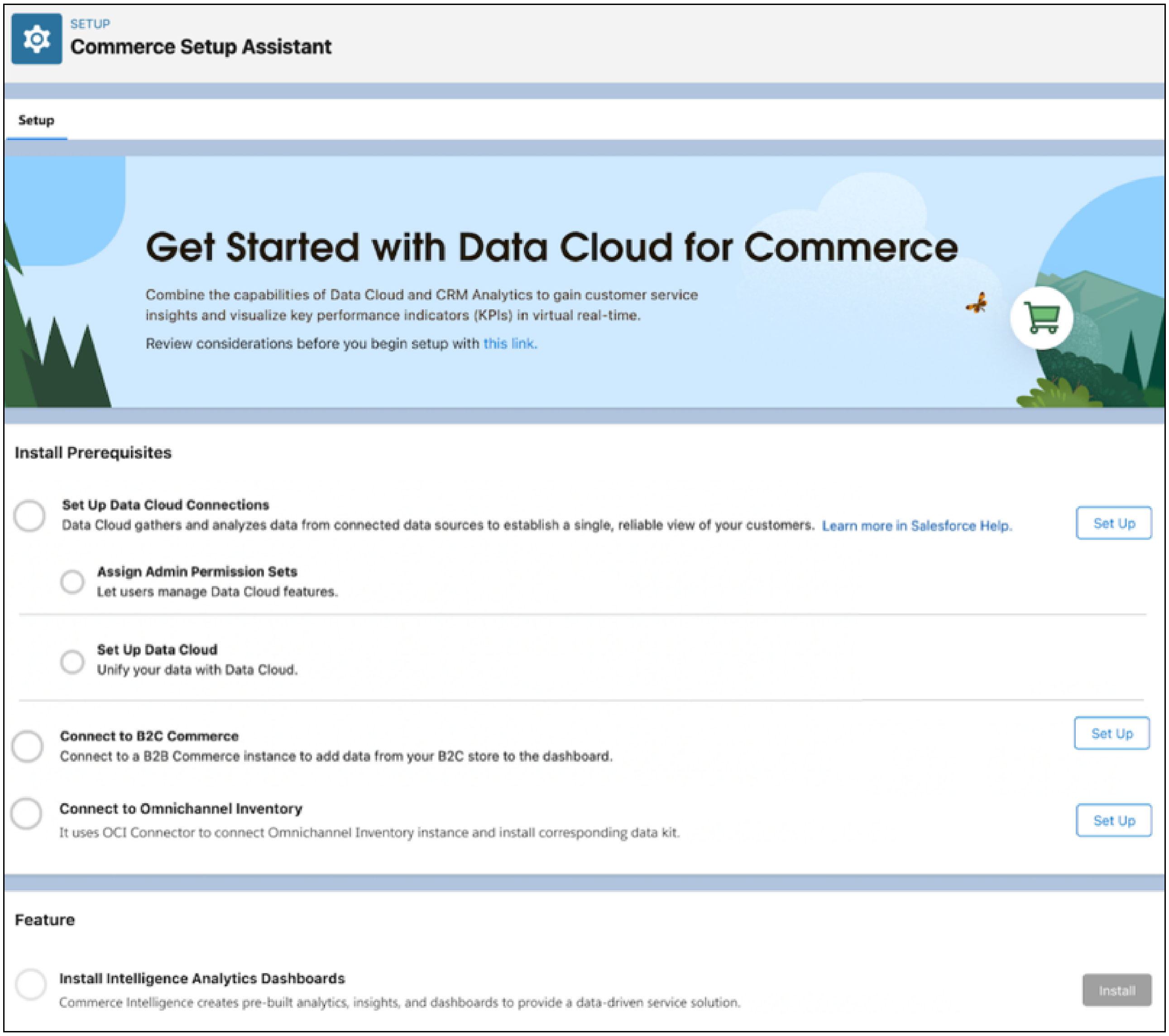
    Enabling Commerce Personalization requires buyer groups based on Data Cloud segments. See Create a Buyer Group Based on a Data Segment.

To access the Intelligence Analytics dashboards from your store home page, click **Insights**. To access them from the Commerce home page, click **View All Analytics**.

Set Up Data Cloud for Commerce for a B2C Store

To set up Data Cloud for Commerce, you need Data Cloud and CommerceIntelligenceB2CE licenses.

1. At the top of the page, click ⚙, and then select **Setup**.
2. In the Quick Find box, find and select **Commerce Setup Assistant**.
3. On the Set Up Data Cloud for Commerce tile, click **Get Started**.



Get Started with Data Cloud for Commerce

Combine the capabilities of Data Cloud and CRM Analytics to gain customer service insights and visualize key performance indicators (KPIs) in virtual real-time.

Review considerations before you begin setup with this link.

Install Prerequisites

○ Set Up Data Cloud Connections
Data Cloud gathers and analyzes data from connected data sources to establish a single, reliable view of your customers. Learn more in Salesforce Help. Set Up

○ Assign Admin Permission Sets
Let users manage Data Cloud features.

○ Set Up Data Cloud
Unify your data with Data Cloud.

○ Connect to B2C Commerce
Connect to a B2B Commerce instance to add data from your B2C store to the dashboard. Set Up

○ Connect to Omnichannel Inventory
It uses OCI Connector to connect Omnichannel Inventory instance and install corresponding data kit. Set Up

Feature

○ Install Intelligence Analytics Dashboards
Commerce Intelligence creates pre-built analytics, insights, and dashboards to provide a data-driven service solution. Install

4. Next to the Set Up Data Cloud Connections step, click **Set Up**.

   If you have an Enterprise or Unlimited edition, this step begins automatically. Click **Complete Setup** to finish the process.

   You're assigned the Data Cloud Admin and Einstein Analytics Admin permission sets, so you can create data streams and access all the Data Cloud for Commerce features. Setup also configures Data Cloud in your org.

5. Connect B2C Commerce with Data Cloud.
   a. Next to the Connect to B2C Commerce step, click **Set Up**.
   b. Link B2C Commerce with Data Cloud. See Set Up a B2C Commerce Connection.

6. Deploy the data streams for B2C Commerce.
   a. From the App Launcher, find and open **Data Cloud**.
   b. On the Data Streams tab, click **New**.
   c. Select the B2C Commerce connected data source, and click **Next**.

   d. Select your connected Commerce instance.

      If there’s only one Salesforce org connected to Data Cloud, it’s selected by default.

   e. Select **Bundles**, select the Order bundle, and then click **Next**.

   f. Select the default data space, and click **Next**.

      The installed objects and fields are displayed. Don’t remove the data objects, fields, or mappings because Data Cloud for Commerce relies on the standard installation to populate the dashboards correctly.

   g. Click **Deploy**.
      The Data Streams tab shows the progress. When the data streams show an Active status, you’re ready to continue.

7. To return to the Commerce Setup Assistant, at the top of the page, click ⚙ and select **Setup**. In the Quick Find box, find and select **Commerce Setup Assistant**.

8. (Optional) To add inventory data to the dashboards, click **Set Up** for Connect to Omnichannel Inventory. This option is listed only if you have Omnichannel Inventory provisioned.

   This step imports your Omnichannel Inventory data into Data Cloud and creates the necessary data streams and relationships between data model objects.

   Connecting inventory data to your existing Intelligence Analytics setup overrides customizations to your dashboards. You can reapply the customizations after completing the setup.

9. Next to the Install Intelligence Analytics step, click **Install**.

   The installation takes several minutes. To view the updated statuses, refresh the page. When the installation is complete, click **View Intelligence Analytics** to access the Intelligence Analytics dashboards.

To access Intelligence Analytics dashboards from Business Manager in B2C Commerce, select **site**. Select **Merchant Tools Analytics**, and click **Commerce Intelligence**.

Intelligence Analytics Dashboards Powered by Data Cloud

Intelligence Analytics dashboards display key store performance metrics to help you make data-driven decisions for business agility. Get a comprehensive view of the best performing categories and products within a store, and keep on top of inventory health across your locations and location groups. Explore the Shopper Intelligence dashboard to learn about customer first-time and repeat purchase behavior to drive and retain loyalty.

Shopper Intelligence Analytics Dashboard

Understand the shopping behavior of your customers. Review data around active, at-risk, and churned customers.

Inventory Intelligence Analytics Dashboard

If you’re using Salesforce Omnichannel Inventory, use this dashboard to get insight into inventory performance. View data about inventory levels and orders across locations and units sold.

Product Intelligence Analytics Dashboard

Get insight into product performance and top-selling categories across regions. View data about low-selling products, product searches, and see what products are frequently bought together.

Shopper Intelligence Analytics Dashboard

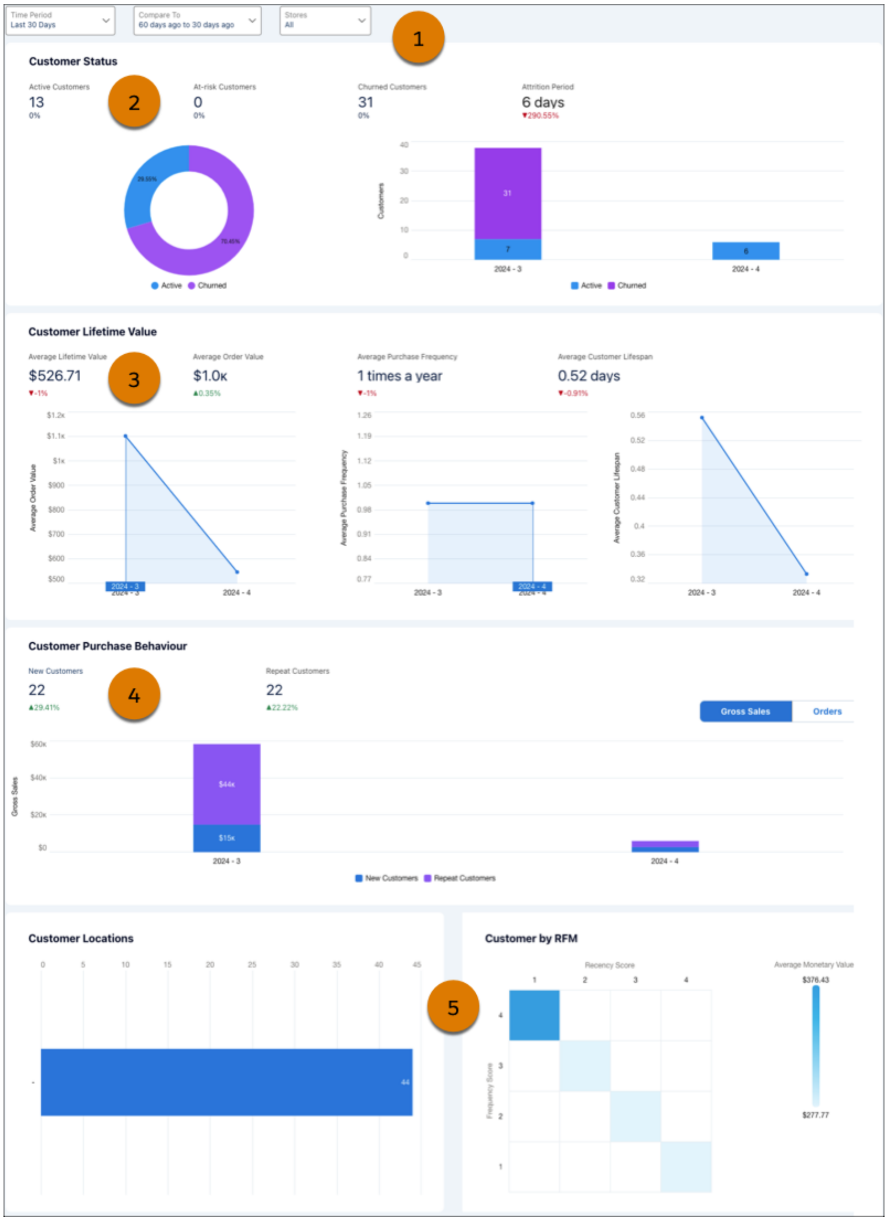
Understand the shopping behavior of your customers. Review data around active, at-risk, and churned customers.

Use filters to select specific time periods and stores (1). Review high-level statistics and charts about your customers (2) and customer lifetime value (3). Understand more about your customers' purchase behavior (4) and their location and recency, frequency, and monetary value (RFM) score (5).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



Time Period: Last 30 Days

Compare To: 60 days ago to 30 days ago

Stores: All

Customer Status

Active Customers: 13 (0%)

At-risk Customers: 0 (0%)

Churned Customers: 31 (0%)

Attrition Period: 6 days (▼290.55%)

Customer Lifetime Value

Average Lifetime Value: $526.71 (▼-1%)

Average Order Value: $1.0K (▲0.35%)

Average Purchase Frequency: 1 times a year (▼-1%)

Average Customer Lifespan: 0.52 days (▼-0.91%)

Customer Purchase Behaviour

New Customers: 22 (▲29.41%)

Repeat Customers: 22 (▲22.22%)

Customer Locations

Customer by RFM

CUSTOMER KPI	CALCULATION
Active Customers	Customers who actively purchase on the store and are within the store’s attrition period.
At-Risk Customers	Customers who are within 20% of the attrition period and are at risk of not buying from the store again.
Churned Customers	Customers who have surpassed the attrition period since they last purchased from the store.
Attrition Period	The number of days after which a customer is unlikely to purchase from you again.
Average Lifetime Value	Total average revenue from a customer over their relationship with the business.
Average Order Value	Average value of orders placed by customers in your store. Order value excludes the cost of tax and shipping.
Average Purchase Frequency	Average number of orders placed per customer.
Average Customer Lifespan	Average number of days between the first and last order date of all your customers
New Customers	The number of customers who made their first purchase.
Repeat Customers	Customers who made a repeat purchase, with their first purchase occurring before the selected date range.
Customer by RFM	Organizes customers by how recently they’ve made a purchase, how often they buy, and the size of their purchases.

SEE ALSO:

Inventory Intelligence Analytics Dashboard

Product Intelligence Analytics Dashboard

Inventory Intelligence Analytics Dashboard

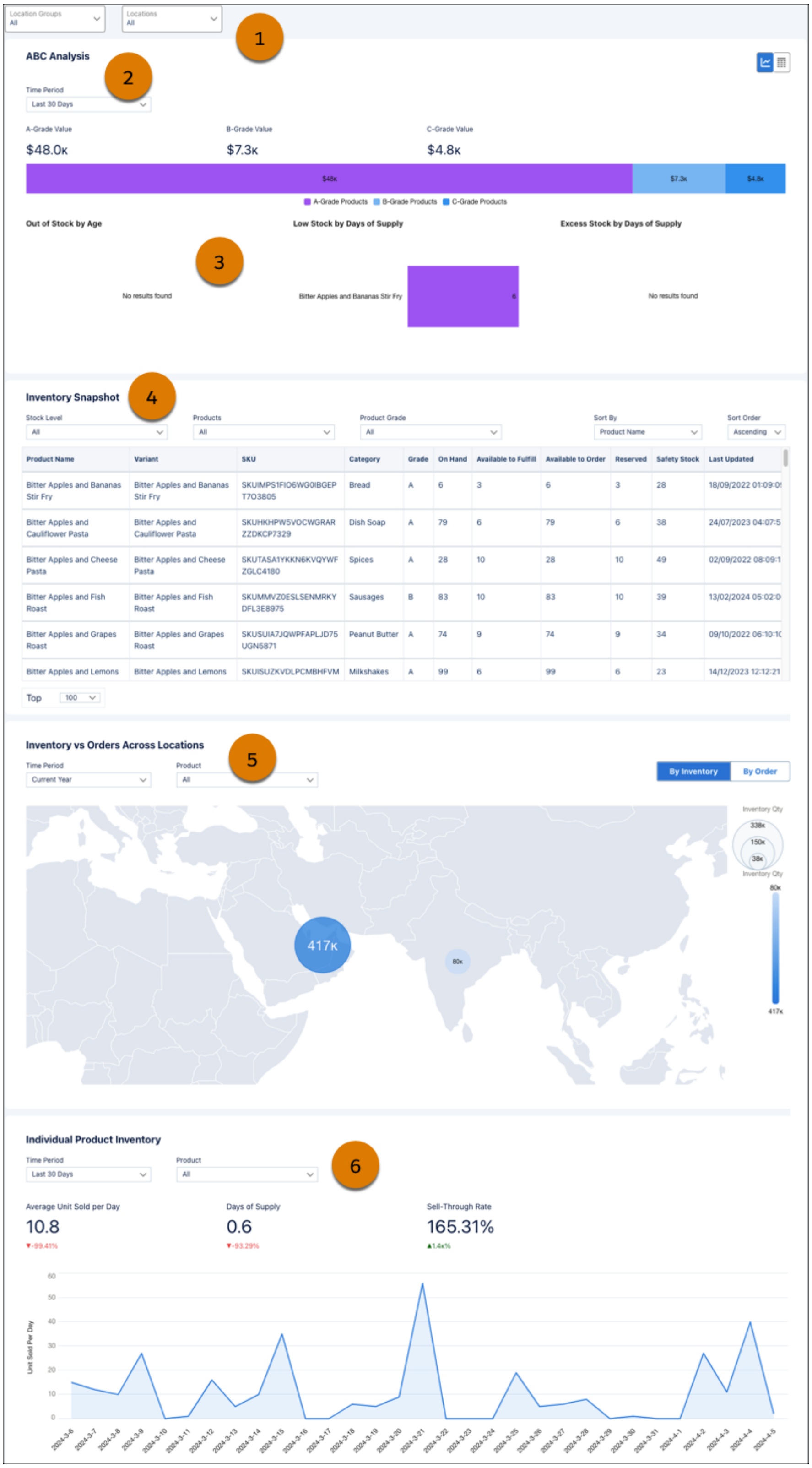
If you’re using Salesforce Omnichannel Inventory, use this dashboard to get insight into inventory performance. View data about inventory levels and orders across locations and units sold.

Use filters to select locations and time periods (1). See the value of inventory items based on their importance to the business (2), and review charts that show stock supply (3). Understand more about your current inventory snapshot with filters for stock level, product, and product grade (4). Review your inventory and order levels by location (5) and for individual products (6).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



Location Groups: All
Locations: All

ABC Analysis

Time Period: Last 30 Days

A-Grade Value
$48.0k

B-Grade Value
$7.3k

C-Grade Value
$4.8k

Out of Stock by Age

No results found

Low Stock by Days of Supply

Excess Stock by Days of Supply

No results found

Inventory Snapshot

Stock Level: All
Products: All
Product Grade: All
Sort By: Product Name
Sort Order: Ascending

Product Name	Variant	SKU	Category	Grade	On Hand	Available to Fulfill	Available to Order	Reserved	Safety Stock	Last Updated
Bitter Apples and Bananas Stir Fry	Bitter Apples and Bananas Stir Fry	SKUIMPS1FIO6WG0IBGEP T7O3805	Bread	A	6	3	6	3	28	18/09/2022 01:09:0
Bitter Apples and Cauliflower Pasta	Bitter Apples and Cauliflower Pasta	SKUHKHPW5VOCWGRAR ZZDKCP7329	Dish Soap	A	79	6	79	6	38	24/07/2023 04:07:5
Bitter Apples and Cheese Pasta	Bitter Apples and Cheese Pasta	SKUTASA1YKKN6KVQYWF ZGLC4180	Spices	A	28	10	28	10	49	02/09/2022 08:09:1
Bitter Apples and Fish Roast	Bitter Apples and Fish Roast	SKUMMVZ0ESLSENMRKY DFL3E8975	Sausages	B	83	10	83	10	39	13/02/2024 05:02:0
Bitter Apples and Grapes Roast	Bitter Apples and Grapes Roast	SKUSUIA7JQWPFAPLJD75 UGN5871	Peanut Butter	A	74	9	74	9	34	09/10/2022 06:10:1
Bitter Apples and Lemons	Bitter Apples and Lemons	SKUISUZKVDLPCMBHFVM	Milkshakes	A	99	6	99	6	23	14/12/2023 12:12:21

Top: 100

Inventory vs Orders Across Locations

Time Period: Current Year
Product: All

Individual Product Inventory

Time Period: Last 30 Days
Product: All

Average Unit Sold per Day
10.8
▼-99.41%

Days of Supply
0.6
▼-93.29%

Sell-Through Rate
165.31%
▲1.4x%

INVENTORY KPI	CALCULATION
ABC Analysis by Product	The value of inventory items based on their importance to the business. A-Grade are the top-selling products that account for 70%–80% of gross sales. B-Grade are products that account for 15%–25% of gross sales. C-Grade are products that account for 5%–10% of gross sales.
Out of Stock by Age	The number of days that the product was out of stock during the defined period.
Days of Supply	The number of days that the current inventory will last at the current rate of sales.
Low Stock by Days of Supply	Products with a Days of Supply less than 10 days.
Excess Stock by Days of Supply	Products with a Days of Supply greater than 180 days.
Average Unit Sold Per Day	The average number of inventory units sold each day over a specific period.
Sell-Through Rate	The percentage of inventory that was sold compared to what was available.

SEE ALSO:

Shopper Intelligence Analytics Dashboard

Product Intelligence Analytics Dashboard

Product Intelligence Analytics Dashboard

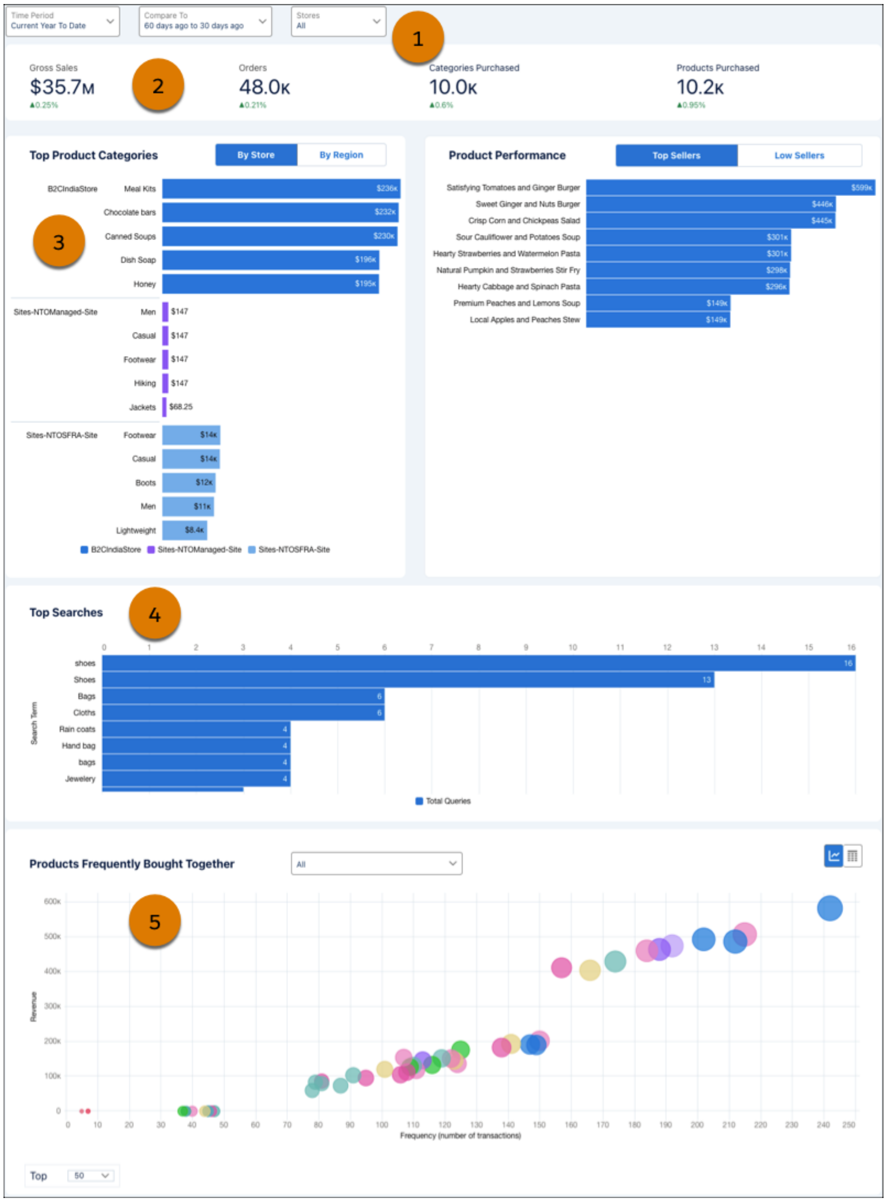
Get insight into product performance and top-selling categories across regions. View data about low-selling products, product searches, and see what products are frequently bought together.

Use filters to select specific time periods and stores (1). See high-level statistics about your sales, orders, and purchased categories and products (2), review charts that show your top-selling products and categories (3). Understand more about your customer's product search behavior (4). Review data about which products are frequently bought together (5).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



Time Period: Current Year To Date
Compare To: 60 days ago to 30 days ago
Stores: All

Gross Sales: $35.7M ▲0.25%
Orders: 48.0K ▲0.21%
Categories Purchased: 10.0K ▲0.6%
Products Purchased: 10.2K ▲0.95%

PRODUCT KPI	CALCULATION
Gross Sales	The grand total of all sales transactions.
Orders	The total number of orders.
Categories Purchased	The total number of unique product categories with sales transactions.
Products Purchased	The total number of unique products with sales transactions.

SEE ALSO:

- Shopper Intelligence Analytics Dashboard
- Inventory Intelligence Analytics Dashboard

Personalization Powered by Data Cloud

Personalize the shopper experience and enhance customer engagement by using Data Cloud segments.

Create a Buyer Group Based on a Data Segment

Personalize your customers' shopping experience by combining the power of Data Cloud segments and Commerce buyer groups. Build a targeted customer group using Data Cloud segments and associate it with a Commerce buyer group. You can then deliver personalized promotions and content that directly caters to customer needs and interests.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions where Data Cloud is enabled

Available in: B2B Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

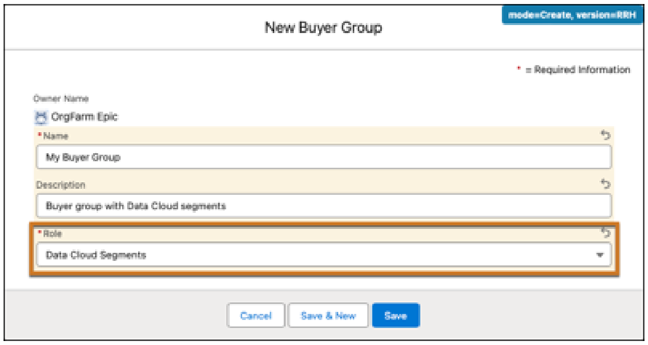
Deploy Commerce B2B and D2C data bundles in your org. See Commerce Data Bundle Mappings.

1. In the App Launcher, find and select **Data Cloud**, and then create and publish a data segment by applying filters to capture the data you need.

   You need Data Cloud Admin access to complete this step.

   For example, you can use the Sales Order data model object filters to create a data segment of customers who made at least one high-value purchase in the past year. See Create a Segment in Data Cloud.

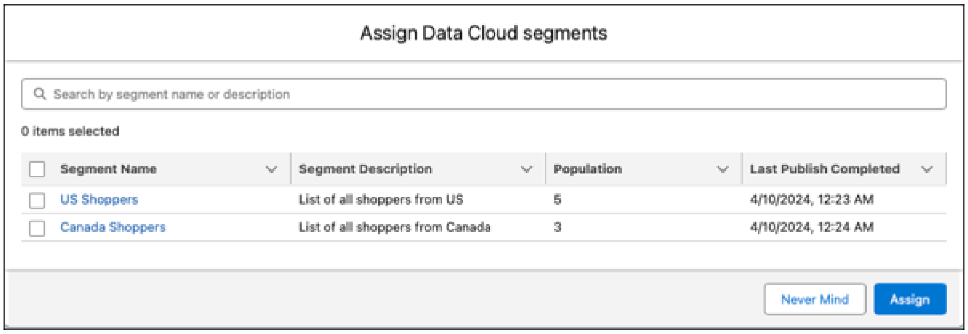
2. Create a buyer group.
   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **Customers** > **Buyer Groups**.
   c. Click **New**.
   d. Enter the information, and for the role, select **Data Cloud Segments**.



Owner Name
OrgFarm Epic
*Name
My Buyer Group
Description
Buyer group with Data Cloud segments
*Role
Data Cloud Segments

   e. Click **Save**.
   f. In the Related section, under Data Cloud Segments, click **Assign**.

g. In the Assign Data Cloud segments window, select one or more data segments, and click **Assign**.


Assign Data Cloud segments
Search by segment name or description
0 items selected
Never Mind
Assign

☐ Segment Name	Segment Description	Population	Last Publish Completed
☐ US Shoppers	List of all shoppers from US	5	4/10/2024, 12:23 AM
☐ Canada Shoppers	List of all shoppers from Canada	3	4/10/2024, 12:24 AM

3. Click ⚙ at the top of the page, and then select **Setup**.
4. In the Quick Find box, enter `Commerce Personalization`, and then select **Commerce Personalization**.
5. Enable Commerce Personalization.

You can now create targeted promotion campaigns and associate them to the segmented buyer group. See Add a Promotion Segment.

You can also create targeted content on your storefront and make it visible only to the specific buyer group. To configure dynamic visibility rules for storefront components, see Control When a Component Is Visible.

SEE ALSO:

Add Accounts to a Buyer Group for B2B Stores

Store Management

Manage stores more efficiently using workspaces. Expand the reach of your store by enhancing language and currency support. Create and manage promotions to increase buyer incentive. Migrate store configurations, create custom reports, and manage existing integrations. Set up the emails that shoppers and buyers receive when they place an order, and what they see when your site isn't available. Review the steps required to use Omnichannel Inventory with commerce stores.

Goals and Recommendations

Get specific actions that you can take to achieve performance goals for your store. Goals can include improving site conversion and increasing site traffic and average order value.

Shopper Copilot for Commerce Stores

Shopper Copilot is an Einstein Bot that bridges the gap between the in-store and online shopping experience. Use generative AI and learning language models to inform and assist your customers throughout their discovery and purchase journeys. Customers can engage with Shopper Copilot within a Commerce store and across various conversational channels. You can also add other Einstein Bot components to the template to extend the capabilities. Shopper Copilot is supported only in English.

Customer Notifications for Commerce Stores

Sending notifications to your customers is crucial because it helps keep them engaged and informed. You can send customers the details of their order or remind them about items they have shown interest in, and encourage them to make a purchase. Additionally, notifications can help build brand loyalty.

Displayable Fields for Commerce Stores

Displayable fields help to decrease page load times and retrieve product data faster on search, product, cart, and checkout pages.

Get Help with Product Visibility Issues with the Troubleshooting Assistant

To troubleshoot issues with product visibility, ask the Troubleshooting Assistant for help. The Troubleshooting Assistant can help you determine whether a buyer or guest customer can see a product in the store. The Troubleshooting Assistant displays the tasks required to configure a store and its products and which of those tasks have been completed.

Using Salesforce CMS for Product Media

A Content Management System (CMS) workspace offers a secure environment to create, edit, organize, and manage digital content. When you create a store, a CMS workspace for the store and a public channel from the store to that workspace are added. You can upload or import product media from a CMS workspace into your store.

Assign a CMS Public Channel to a Commerce Store

When you create a store, a CMS workspace and a public channel to the workspace are added. If you have an LWR store built on an enhanced LWR site, you can change the public channel. A store can access content from all CMS workspaces that include the store's public channel.

Commerce Workspaces

Multiple workspaces come together in the Commerce app to make workflows more efficient, make information easier to find and update, and to organize shared contents.

Migrate Your Store Configuration

After you configure your store, you can move its configuration to a new environment, for example, from sandbox to production, by creating a change set. The change set includes the store's metadata, such as descriptions, localization, pricing, and search settings.

Commerce Analytics

Take action on insights about revenue, product performance, and customer behavior from Commerce Analytics dashboards.

Create Custom Reports with Search and Category Data for B2B Stores

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

Manage Integrations for Your Store

Your B2B or D2C store requires several integrations to function properly.

Set Up Inventory for Commerce Stores

To integrate inventory with your store, use Omnichannel Inventory or a custom provider. Use the Commerce Setup Assistant to quickly configure default settings in Omnichannel Inventory. You can also manually configure your store to add custom integrations.

Replace a Default Commerce Process with an Apex Class

Use extension points to enhance or replace default Salesforce Commerce processing with Apex classes. For example, by default Salesforce Commerce uses standard Salesforce price books to determine how products are priced. If you want to use a different pricing method, you can use an Apex class for pricing instead.

Configure What Shoppers or Buyers See When a Store Isn't Available

When a CDN is enabled for your store, the Service Not Available page is available in Experience Builder for you to customize with your own brand and message. Shoppers and buyers see the Service Not Available page when your store is unavailable.

Goals and Recommendations

Get specific actions that you can take to achieve performance goals for your store. Goals can include improving site conversion and increasing site traffic and average order value.

Considerations for Goals and Recommendations

As you begin using goals and recommendations, keep these considerations in mind.

Get Recommendations to Improve Store Performance

Use the available goals and their corresponding recommended actions to achieve specific targets for your store. You can choose which recommended actions to take. Some are based on insights into your store and unique to your store's data, and others are general recommended actions. Monitor goal progress over time with data-driven insights into conversion rate, average order value, site traffic and more.

Set a Target to Track Goal Progress

Track the progress of your goal over time, and see how completing recommended actions impacts your progress. The target remains set until you reach the target value or its end date.

Considerations for Goals and Recommendations

As you begin using goals and recommendations, keep these considerations in mind.

- Some goals and recommendations appear only if your data meets the criteria for showing them.
- Some recommendations use Einstein Generative AI, which must be enabled in your org. See Enable Einstein Generative AI.
- Your org must have sales data for some recommendations to appear.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Get Recommendations to Improve Store Performance

Get Recommendations to Improve Store Performance

Use the available goals and their corresponding recommended actions to achieve specific targets for your store. You can choose which recommended actions to take. Some are based on insights into your store and unique to your store's data, and others are general recommended actions. Monitor goal progress over time with data-driven insights into conversion rate, average order value, site traffic and more.

1. From the App Launcher, find and select **Goals and Recommendations**.
2. From the Scope dropdown, select a store to view the available goals.
3. Select a goal to see the corresponding recommended actions.
4. To view the details of a recommended action, click **Get Started**.
5. To proceed with the recommended action, click **Get Started** or close the window to exit.

Use the History table to view the date, details, status, and output of accepted actions for the selected goal.

SEE ALSO:

Considerations for Goals and Recommendations

Set a Target to Track Goal Progress

Track the progress of your goal over time, and see how completing recommended actions impacts your progress. The target remains set until you reach the target value or its end date.

1. From the App Launcher, find and select **Goals and Recommendations**.
2. From the Scope dropdown, select a store to view the available goals.
3. In a goal tile, click the dropdown and select **Edit Target**.

4. Select **Specific Target**, and enter the target value and end date.
5. Click **Save**.

To remove the target, select **No Target**.

SEE ALSO:

Goals and Recommendations

Shopper Copilot for Commerce Stores

Shopper Copilot is an Einstein Bot that bridges the gap between the in-store and online shopping experience. Use generative AI and learning language models to inform and assist your customers throughout their discovery and purchase journeys. Customers can engage with Shopper Copilot within a Commerce store and across various conversational channels. You can also add other Einstein Bot components to the template to extend the capabilities. Shopper Copilot is supported only in English.

Shopper Copilot and Your Data

Shopper Copilot uses your data to add context and personalization to your prompt, a method known as grounding.

Set Up Shopper Copilot for a B2B or D2C Store

To prepare for deploying a bot in your B2B or D2C store, set up Shopper Copilot. For a B2B or D2C store, enable Shopper Copilot, create a bot integration user and link that bot to the AI Commerce permission set.

Set Up Shopper Copilot for a B2C Store

To prepare for deploying a bot in your B2C store, set up Shopper Copilot. For a B2C store, enable Shopper Copilot settings, create remote site settings and credentials, and install the Shopper Copilot cartridge.

Create a Bot in Your Commerce Store

Use the Shopper Copilot template to create a bot and route your conversations with messaging channels and omnichannel flows. You can also use bot blocks to create a custom bot.

Connect and Train Your Bot to Support Shopper Copilot

When you’re ready to put your bot to work, connect your bot to your store and welcome your new agent to the team.

Customize a Bot for a Commerce Store

Configure your bot for your store and user needs.

SEE ALSO:

Improve Intent Matching Quality with Bot Training

Shopper Copilot and Your Data

Shopper Copilot uses your data to add context and personalization to your prompt, a method known as grounding.

Shopper Copilot uses the data in these objects and fields.

Object	Field	Description
Product2	• ID • Name • Description	Represents a product and its description.

Object	Field	Description
PricebookEntry	UnitPrice	Represents a product and a price entry in a price book.

SEE ALSO:

Manage Integrations for Your Store

Set Up Shopper Copilot for a B2B or D2C Store

To prepare for deploying a bot in your B2B or D2C store, set up Shopper Copilot. For a B2B or D2C store, enable Shopper Copilot, create a bot integration user and link that bot to the AI Commerce permission set.

Complete these prerequisites before setting up Shopper Copilot.

1. Enable Einstein generative AI.
2. Create and configure a B2B or D2C store.

Enable Einstein Bots and Shopper Copilot Settings

Give buyers product recommendations and reordering capabilities based on simple questions with Einstein Bots and Shopper Copilot.

1. Enable Einstein Bots.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Einstein Bots`, and then select **Einstein Bots**.
    c. Turn on Einstein Bots, and accept the terms.
2. Enable Shopper Copilot.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Commerce`, and then select **Concierge Settings**.
    c. Turn on Einstein Generative AI for B2B and D2C.

Create a Bot Integration User for B2B or D2C

The integration user runs the actions when a customer interacts with the bot. The number of users you can add is based on your Salesforce edition.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Users`, and then select **Users**.
3. Click **New User**, and enter the user's information.
4. For User License, select **Salesforce**.
5. For Profile, select **Standard User**.
6. Save your changes.
7. On the user's page, for Permission Sets Assignments, click **Edit Assignments**.

8. Add the AI Commerce Agent permission set to the Enabled Permission Sets column.
9. Save your changes.

To create a bot, go to the Create a Bot in Your Commerce Store section.

SEE ALSO:

B2B and D2C Commerce Integrator Permissions

Set Up Shopper Copilot for a B2C Store

To prepare for deploying a bot in your B2C store, set up Shopper Copilot. For a B2C store, enable Shopper Copilot settings, create remote site settings and credentials, and install the Shopper Copilot cartridge.

Complete these prerequisites before setting up Shopper Copilot for B2C.

1. Create a B2C environment with a configured site containing purchasable products.
2. Create an Open Commerce API (OCAPI) Client ID.

Enable Einstein Bots and Shopper Copilot Settings

Give buyers product recommendations and reordering capabilities based on simple questions with Einstein Bots and Shopper Copilot.

1. Enable Einstein Bots.
   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, enter `Einstein Bots`, and then select **Einstein Bots**.
   c. Turn on Einstein Bots, and accept the terms.
2. Enable Shopper Copilot.
   a. Click ⚙ at the top of the page, and then select **Setup**.
   b. In the Quick Find box, enter `Commerce`, and then select **Concierge Settings**.
   c. Turn on Einstein Generative AI for B2B and D2C.

Configure the Shop API Settings in Your B2C Store for Bot Access

To let your bot access product search, basket, and customer endpoint information from your Commerce B2C store, update the Shop API settings.

To change the Shop API settings, you need your OCAPI Client ID configured in the B2C instance.

1. In Business Manager, select **Administration** > **Sites** > **Manage Sites**.

   Sites appear in the order that you specify throughout the Business Manager user interface.
2. On the Storefront Sites page, in the Business Manager section, click the Business Manager link.
3. Go to **Administration** > **Site Development** > **Open Commerce API Settings**.
4. For Type, select **Shop**.
5. For Context, select **Global**.
6. Use the template to update the Shop API settings.

Example:

```
{
"_v": "24.1",
"clients": [
{
"client_id": "<YOUR-CLIENT-ID-HERE>",
 "resources": [
 {
 "resource_id": "/baskets",
 "methods": ["post"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/baskets/*",
 "methods": ["get", "patch"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/baskets/*/items",
 "methods": ["post"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/customers/auth",
 "methods": ["post"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/product_search",
 "methods": ["get"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/products/(*)",
 "methods": ["get"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 },
 {
 "resource_id": "/sessions",
 "methods": ["post"],
 "read_attributes": "(**)",
 "write_attributes": "(**)"
 }
 ]
 }
 ]
 }
```

Create a Remote Site Setting

A remote site setting provides a secure way for your bot to call out your B2C Commerce store or any other endpoint that you define.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Remote Site`, and then select **Remote Site Settings**.
3. Click **New Remote Site**, and enter this information.
   a. For Remote Site Name, enter your Salesforce Commerce Cloud instance name. For example: `sfcc_abcd001`.
   b. For Remote Site URL, enter the API URL for the site that you're configuring.

      The URL structure must be https://<D2C environment hostname>. For example: https://mystore.commercecloud.salesforce.com.
   c. Select Active.
   d. Save your changes
4. Add the D2C Commerce URL to the Cross-Origin Resource Sharing (CORS) allowlist. SeeConfigure Salesforce CORS Allowlist.

Create an External Credential for Authentication

To authenticate your named credentials to an external system, create an external credential. The external credential links to permission sets and profiles, and, optionally, to custom headers.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Named Credentials`, and then select **Named Credentials**.
3. Click the **External Credentials** tab.
4. Click **New**, and enter the information.
   a. For Label and Name, enter your Salesforce Commerce Cloud instance. For example, SFCC.
   b. For Authentication Protocol, enter *`No Authentication`*.
   c. Save your changes.

Create a Named Credential

You access your B2C store API data by creating a named credential.

Make sure you created an Open Commerce API (OCAPI) Client ID

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Named Credentials`, and then select **Named Credentials**.
3. On the Named Credential tab, click **New**, and enter this information.
   a. For Label, enter a label for your store. For example, `abcd-001 RefArch`.
   b. For Name, enter a name for your store up to 18 characters. For example, `abcd001_refarch`.
   c. For URL, enter the Open Commerce API endpoint for your store. For example, `https://<HOSTNAME>/s/<SITE_ID>/dw/shop/<Open_Commerce_API_Version>.`
   d. For ExternalCredential, select the external credential that you created.
4. Under Custom Header, click **New**, and enter this information.

   a. For Name, enter **Content-Type**.
   b. For Value, enter **application/json**.
   c. For Sequence Number, enter `1`.

5. Create another custom header and enter this information.
   a. For Name, enter `x-dw-client-id`.
   b. For Value, enter the OCAPI Client ID that you want the bot to use to interact with your store.
   c. For Sequence Number, enter `2`.

Install the Concierge Reference Cartridge

To integrate your D2C store with Copilot conversational functionalities, use the reference cartridge as a model for your implementation. A cartridge is a mechanism for packaging and deploying functionalities in your store.

1. Go to Salesforce Commerce GitHub Repository and Access.
2. Use the reference cartridge as a model for your implementation.

Create a bot in your Commerce store.

Create a Custom Permission Set for B2C

To deploy a Einstein Bot template in your store, set up a custom permission set for the bot integration user.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Users`, and then select **Permission Sets**.
3. Click **New.**
4. Enter your permission set information.
5. Save your changes.
6. Under Systems, click **System Permissions.**
7. Click **Edit**.
8. Enable the AI Commerce Agents and View All Users permissions.
9. Save your changes.
10. Under Apps, click **App Permissions**.
11. Click **Edit.**
12. Enable the Run Flows permission.
13. Save your changes.

Create a Bot Integration User for B2C

Each bot needs an integration user that runs the actions when a customer interacts with the bot. The number of users you can add is based on your Salesforce edition.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Users`, and then select **Users**.

3. Click **New User**, and enter the user's information.
4. For User License, select **Salesforce**.
5. For Profile, select **Standard User**.
6. Save your changes.
7. On the user's page, for Permission Sets Assignments, click **Edit Assignments.**
8. Add the permission set you created to the Enabled Permission Sets column.
9. Save your changes.

To create a bot, see Create a Bot in Your Commerce Store

Create a Bot in Your Commerce Store

Use the Shopper Copilot template to create a bot and route your conversations with messaging channels and omnichannel flows. You can also use bot blocks to create a custom bot.

Create a Bot to Support Shopper Copilot
Create a bot for your store by using the Shopper Copilot template.

Connect Your Bot to a User
After creating your user and your bot, you can connect them.

Customize Your Omnichannel Flows to Support a Shopper Copilot Bot
When you create a bot, Salesforce creates inbound and outbound omnichannel flows. You must customize the flows to route conversations to and from your bot.

Map Your Bot to a Messaging Channel
Your bot includes context variables for gathering customer information regardless of the channel. To gather information for a specific channel, add the Routable Id context variable to your channel.

Create a Bot to Support Shopper Copilot

Create a bot for your store by using the Shopper Copilot template.

Before you create the bot, make sure that you have met the prerequisites.

- Turn on messaging.
- Enable Einstein generative AI.
- Verify that the omnichannel is enabled.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Einstein Platform`, and then select **Einstein Bots**.
3. On the Einstein Bots page, launch the guided setup.

   If this is your first bot, click **Create a New Bot**. Otherwise, click **New**.

4. Select **Enhanced Bot**, and click **Next**.
5. Select **Commerce Concierge for B2B and D2C Template** or **Commerce Concierge for B2C Template**, and click **Next**.
6. Enter the information to personalize your bot, and click **Next**.
7. Select **Create an inbound Omni-Channel flow for my bot**, and click **Next**.

8. Click **Proceed**.
9. Click **Finish**.

   Salesforce creates the bot and simple inbound and outbound omnichannel flows and then displays the Bot Builder Dialogs page. Your omnichannel flows don't route conversations to or from your bot until you customize them. See Customize an Omnichannel Flow for a Bot to Support Shopper Copilot.

After, create messaging channels to generate an omnichannel flow that routes conversations to and from the bot.

SEE ALSO:

B2B and D2C Commerce Integrator Permissions

Add Flexibility and Power with Messaging for In-App and Web

Connect Your Bot to a User

After creating your user and your bot, you can connect them.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Einstein Platform`, and then select **Einstein Bots.**
3. On the **My Bots** tab, select your bot.
4. From the Bot Builder Menu, select **Overview**.
5. Under Settings, for Bot User, select **Custom Chatbot User**.
6. Save your changes.

Customize Your Omnichannel Flows to Support a Shopper Copilot Bot

When you create a bot, Salesforce creates inbound and outbound omnichannel flows. You must customize the flows to route conversations to and from your bot.

To send conversations to your bot:	To transfer conversations from your bot:
The inbound omnichannel flow created is named Route to [Bot Name] and appears on the Bot Overview page in the Inbound Omni-Channel Flows section. • In Flow Builder, in the Route Work action, specify a fallback queue. • Make any other customizations. • Activate the flow. • On the Bot Overview page, add your flow to a Messaging channel in the Inbound Omni-Channel Flows section. Otherwise, go to the Messaging Settings page in Setup. To create an omnichannel flow from scratch, see Route Conversations to an Enhanced Bot.	The outbound omnichannel flow created is named Route from [Bot Name] and appears on the Bot Overview page in the Outbound Omni-Channel Flows section. • – In Flow Builder, in the Route Work action, specify an agent, bot, queue, or skill as the transfer destination . – Make any other customizations and activate the flow. To use a different flow to transfer conversations from your bot, see Specify a Default Outbound Omni-Channel Flow.

To learn more about routing conversations with Omni-Channel Flow, see Route Conversations to and from Your Enhanced Bot.

To learn about available Omni-Channel flow templates or to connect your inbound Omni-Channel flow to an enhanced channel on the Messaging Settings page, see Route Service Cloud Messaging Sessions with Omni-Channel Flows. Most Omni-Channel flow templates don't include routing to a bot, so you need to customize them with a Route Work action to a bot.

SEE ALSO:

Add Flexibility and Power with Messaging for In-App and Web

Map Your Bot to a Messaging Channel

Your bot includes context variables for gathering customer information regardless of the channel. To gather information for a specific channel, add the Routable Id context variable to your channel.

1. In the Einstein Bot app, from the Einstein Bot dropdown, select **Variables**.
2. On the Variables page, select **Routable Id**.
3. Click **New**.
4. For Connection Type, select the channel that you want to connect to your bot.
5. For Field Name, select **Messaging Session ID**.
6. Save your changes.

SEE ALSO:

Add Flexibility and Power with Messaging for In-App and Web

Connect and Train Your Bot to Support Shopper Copilot

When you're ready to put your bot to work, connect your bot to your store and welcome your new agent to the team.

Connect a Bot to Your B2B or D2C Store

Connect the bot to your store by adding your webstore ID, login page URL, and cart page URL to the Dialog object.

Connect a Bot to Your B2C Store

Connect the bot to your B2C store by adding your webstore ID, which is the named credential that you created.

Train Your Shopper Copilot Bot

Train your bot to recognize your customers' natural language inputs with an intent model. The model contains intents and utterances that tell the bot what the customer wants in different ways. The Commerce bot template includes utterances for a few intents, but the more utterances that you add, the more likely the bot can make a correct decision.

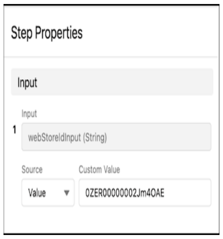
Connect a Bot to Your B2B or D2C Store

Connect the bot to your store by adding your webstore ID, login page URL, and cart page URL to the Dialog object.

1. In the Commerce app, from the Commerce dropdown, select **Stores**.
    a. Click the store that you want to assign the bot to, copy the URL ID, and save it for a future step.

       The URL ID is an 18-character string between the forward slashes and starts with OZE. For example, 0ZER00000002Jm4OAE.
    b. From Setup, in the Quick Find box, enter `Einstein Platform`, and then select **Einstein Bots**.
    c. Under Name, select the bot that you want to connect.

2. In the Bot Builder, from the Bot Builder menu, select **Dialogs**.
   a. Select the **Set Commerce Bot Context** dialog.
   b. On the canvas, click the **Action** tile.
   c. In the Step Properties panel, in the Input section, for Source, select **Value**.
   d. For Custom Value, enter the URL ID of your store.
   e. Save your changes.



Step Properties

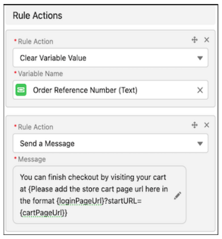
Input

1 Input: webStoreIdInput (String)

Source: Value

Custom Value: 0ZER00000002Jm4OAE

3. Go back to the Commerce app, click the Commerce dropdown, and select **Stores**.
   a. Click **Administration**, and select **General Settings**.
   b. Under More Information, click the URL.
   c. On your store's home page, click **Login**, copy the URL, and save it for a future step.
   d. On your store's home page, click the cart icon, copy the URL, and save it for a future step.
4. In the Bot Builder, from the Bot Builder menu, select **Dialogs**.
   a. Search for Reorder Block, and select **Complete Purchase**.
   b. On the canvas, click the **Message** tile.
   c. In the Step Properties panel, in the Rule Actions section, for Message, substitute {loginPageUrl} and {cartPageUrl} with your store's information.



Rule Actions

* Rule Action: Clear Variable Value

* Variable Name: Order Reference Number (Text)

* Rule Action: Send a Message

* Message: You can finish checkout by visiting your cart at {Please add the store cart page url here in the format {loginPageUrl}?startURL={cartPageUrl}}

5. Save your changes.

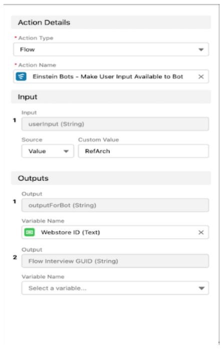
Connect a Bot to Your B2C Store

Connect the bot to your B2C store by adding your webstore ID, which is the named credential that you created.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Einstein Platform`, and then select **Einstein Bots**.
3. Click the bot that you want to add.

4. In the Bot Builder, from the Einstein Bot dropdown, select **Dialogs**.
5. Select **Set Commerce Bot Context**.
6. On the canvas, click the **Webstore Action** tile.
7. In the Step Properties panel, in the Input section, for Source, select **Value**.
8. For the Custom Value, enter the Webstore ID variable.

   This variable is the named credential you set in Create a Named Credential.



Action Details

* Action Type: Flow
* Action Name: Einstein Bots - Make User Input Available to Bot

Input

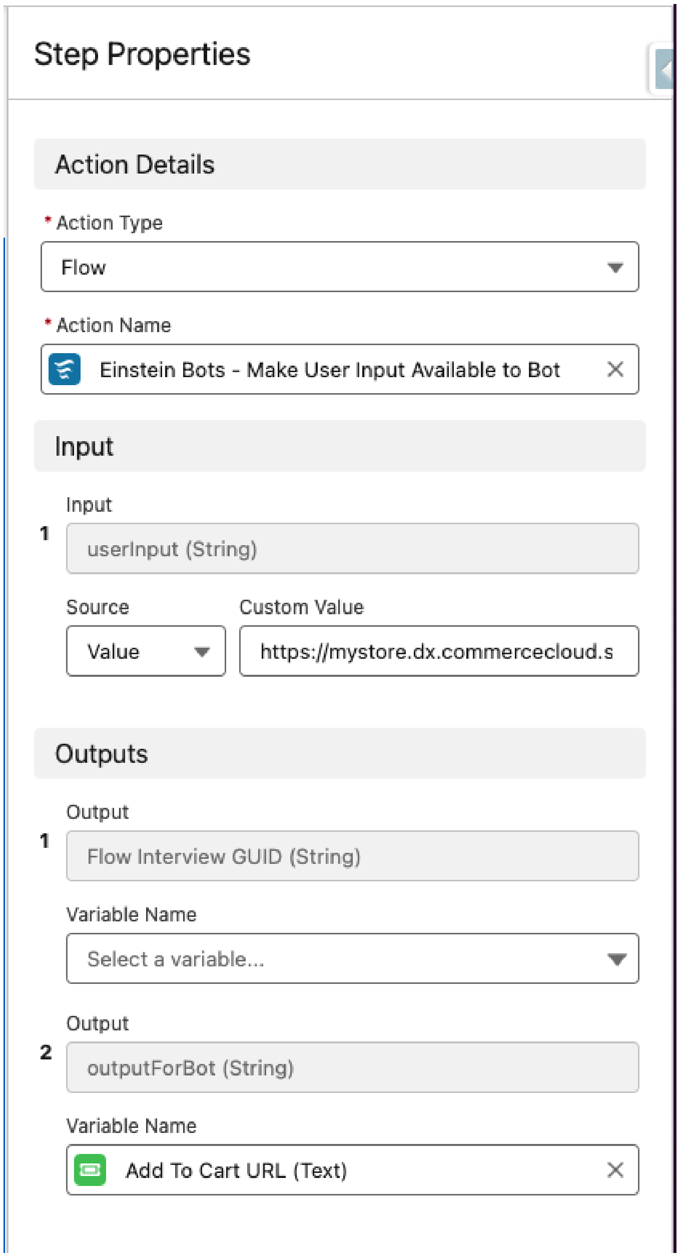
1 Input: userInput (String)
Source: Value
Custom Value: RefArch

Outputs

1 Output: outputForBot (String)
Variable Name: Webstore ID (Text)

2 Output: Flow Interview GUID (String)
Variable Name: Select a variable...

9. Click the **Add to Cart URL**.
10. In the Step Properties panel, in the Input section, for Source, select **Value**.
11. For Custom Value, enter the add to cart endpoint for this site. For example:
    `https://mystore.dx.commercecloud.salesforce.com/on/demandware.store/Sites-{{yourSiteID}}-Site/default/Concierge-Cart?basket=`



Step Properties

Action Details

* Action Type: Flow

* Action Name: Einstein Bots - Make User Input Available to Bot

Input

1 Input: userInput (String)

Source: Value

Custom Value: https://mystore.dx.commercecloud.s

Outputs

1 Output: Flow Interview GUID (String)

Variable Name: Select a variable...

2 Output: outputForBot (String)

Variable Name: Add To Cart URL (Text)

12. Save your changes.

Train Your Shopper Copilot Bot

Train your bot to recognize your customers' natural language inputs with an intent model. The model contains intents and utterances that tell the bot what the customer wants in different ways. The Commerce bot template includes utterances for a few intents, but the more utterances that you add, the more likely the bot can make a correct decision.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Einstein Platform`, and then select **Einstein Bots**.
3. Click the bot that you want to train.

4. In the Bot Builder, from the Einstein Bot dropdown, select **Model Management**.
5. On the Bot Training tab, click **Build Model** and wait for a few minutes to train your bot.
6. Test your bot.
   a. Go to the Model tab.
   b. Under Input Tester, write an intent.
   c. In Dialogues, under Product Recommendations Block, add utterances to the Get Product Recommendations intent so that your bot can recognize different types of products sold in your store.
7. If the bot isn't answering messages, consider increasing the bot timeout limit. Contact Salesforce Support for assistance. If your bot isn't replying with the intended results, make sure that you've trained the intent model.

Give your bot access to different features by assigning it a custom user profile. Each bot has a Basic Chatbot User profile, but you can create a custom user profile and add it to a bot. A custom bot user profile must have access to all resources required to run the bot, including object access, Visualforce pages, Lightning web components, and Apex classes.

SEE ALSO:

Write Utterances for Einstein Bots

Improve Intent Matching Quality with Bot Training

Customize a Bot for a Commerce Store

Configure your bot for your store and user needs.

Configure a Store Catalog Description to Support Shopper Copilot

The bot can use the store catalog description to generate product recommendations based on a customer's query.

Create a Customized Shopper Copilot Bot for B2B or D2C

Instead of using the template to create a B2B or D2C bot, you can create one using bot blocks. A bot block is a group of components that you can import to multiple bots. By choosing to exclude some bot blocks, you can customize your store for your business and customers.

Create a Customized Shopper Copilot Bot for B2C

Create a B2C bot one using bot blocks. A bot block is a group of components that you can import to multiple bots. By choosing to exclude some bot blocks, you can customize your store for your business and customers.

Adjust Order Numbers for Content Migrated to Shopper Copilot for B2B or D2C

When you migrate the content of your store from another platform to Commerce Cloud, in some cases, previous orders have reference numbers that use a different pattern than the one in Salesforce Commerce. So your Shopper Copilot bot can recognize the migrated orders, add the previous reference number pattern.

Configure a Store Catalog Description to Support Shopper Copilot

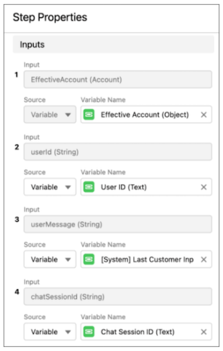
The bot can use the store catalog description to generate product recommendations based on a customer's query.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Process Automation`, and then select **Flows**.
3. Select **Concierge Bots for B2B or D2C: Get Product Recommendations** or **Concierge Bots for B2C: Get Product Recommendations**.

4. In the flow, click the **Get Product Recommendation** action element.
    a. Click **Edit Element**.
    b. Update the Web Store Description field using up to 4,000 characters.

       Add categories such as Games, Electronics, and Accessories to a catalog description. You don't receive an error if your description exceeds 4,000 characters, but the recommendation stops working.

    c. Click **Save As**.
    d. Click **New Version**.
    e. Click **Save**.
5. In the Bot Builder, from the Bot Builder menu, select **Dialogs**.
    a. Select **Product Recommendations Block**, and click **Get Product Recommendations**.
    b. Select the **Action** element.
    c. Replace the inputs and outputs with the following name variables.



Step Properties

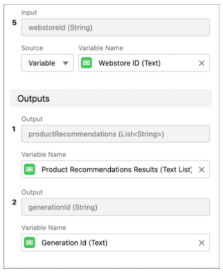
Inputs

1 Input: EffectiveAccount (Account)
Source: Variable
Variable Name: Effective Account (Object)

2 Input: userId (String)
Source: Variable
Variable Name: User ID (Text)

3 Input: userMessage (String)
Source: Variable
Variable Name: [System] Last Customer Inp

4 Input: chatSessionId (String)
Source: Variable
Variable Name: Chat Session ID (Text)



5 Input: webstoreId (String)
Source: Variable
Variable Name: Webstore ID (Text)

Outputs

1 Output: productRecommendations (List<String>)
Variable Name: Product Recommendations Results (Text List)

2 Output: generationId (String)
Variable Name: Generation Id (Text)

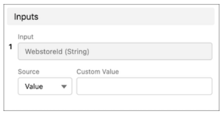
    d. Save your changes.
    e. Click **Activate**.
6. To test some queries and check whether they cover the information that you want your customers to receive, go to Preview in your Bot Builder, and select **Test Preview** .

Create a Customized Shopper Copilot Bot for B2B or D2C

Instead of using the template to create a B2B or D2C bot, you can create one using bot blocks. A bot block is a group of components that you can import to multiple bots. By choosing to exclude some bot blocks, you can customize your store for your business and customers.

1. Import bot blocks.

2. When adding a block, make sure that WebstoreId is the input parameter when the source is a value.



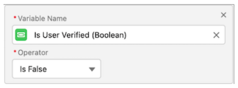
Inputs

Input 1: WebstoreId (String)

Source: Value

Custom Value:

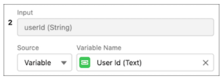
3. The Reorder and Product Discovery blocks depend on the Authentication and Effective Account blocks. To remove this dependency, modify these bot parameters.
   a. Define IsUserVerified as true or false, depending on your user verification requirements.



* Variable Name: Is User Verified (Boolean)

* Operator: Is False

   b. For the userId (String) input, add the Record ID of the user under Variable Name

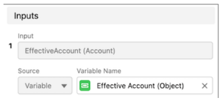


Input 2: userId (String)

Source: Variable

Variable Name: User Id (Text)

   c. For the EffectiveAccountId (Object) input, add the Record ID of the account under Variable Name.



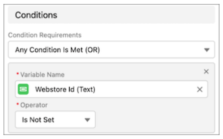
Inputs

Input 1: EffectiveAccount (Account)

Source: Variable

Variable Name: Effective Account (Object)

   d. For the Condition Requirements Any Condition Is Met, set Webstore Id (Text) as the Variable Name.



Conditions

Condition Requirements: Any Condition Is Met (OR)

* Variable Name: Webstore Id (Text)

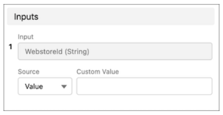
* Operator: Is Not Set

4. Configure a Store Catalog Description to Support Shopper Copilot.
5. Connect a Bot to Your B2B or D2C Store

Create a Customized Shopper Copilot Bot for B2C

Create a B2C bot one using bot blocks. A bot block is a group of components that you can import to multiple bots. By choosing to exclude some bot blocks, you can customize your store for your business and customers.

1. Import bot blocks.
2. When adding a block, make sure that WebstoreId is the input parameter when the source is a value.



Inputs

Input 1: WebstoreId (String)

Source: Value

Custom Value:

3. Populate the Session bridge URL.

4. Configure a Store Catalog Description to Support Shopper Copilot.
5. Connect a Bot to Your B2C Store.

Adjust Order Numbers for Content Migrated to Shopper Copilot for B2B or D2C

When you migrate the content of your store from another platform to Commerce Cloud, in some cases, previous orders have reference numbers that use a different pattern than the one in Salesforce Commerce. So your Shopper Copilot bot can recognize the migrated orders, add the previous reference number pattern.

1. From the Bot Builder menu, select **Entities**.
2. Click **Order Reference Number**.
3. Click **Edit**.
4. Add the pattern of the migrated orders.
5. Save your changes.

Customer Notifications for Commerce Stores

Sending notifications to your customers is crucial because it helps keep them engaged and informed. You can send customers the details of their order or remind them about items they have shown interest in, and encourage them to make a purchase. Additionally, notifications can help build brand loyalty.

Automate Customer Notifications in the Commerce Messaging Workspace

Use the Messaging Workspace to manage automated customer notifications. You can use a custom email domain for each store to provide a branded experience.

Create Order Confirmation Emails with an LWR Template

You can use an LWR template to manually create a confirmation email to send to customers when they submit an order.

Automate Customer Notifications in the Commerce Messaging Workspace

Use the Messaging Workspace to manage automated customer notifications. You can use a custom email domain for each store to provide a branded experience.

Commerce Messaging Considerations and Requirements

As you begin using Commerce Messaging, review important considerations and requirements to help you get started.

Set Up an Email Domain for Commerce Messaging

To provide a branded experience for customers who receive your messages, you can use a custom email domain for each store.

Customize Notification Templates in Commerce Messaging

Automate customer notifications and use consistent messaging. Use the provided templates to customize your message.

Reinstall Commerce Messaging

Messaging is automatically enabled, but if you don’t see message templates in the Messaging Workspace, try reinstalling the Messaging package.

Commerce Messaging Considerations and Requirements

As you begin using Commerce Messaging, review important considerations and requirements to help you get started.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

General Considerations and Requirements

- To see the Messaging Workspace, you must have a Commerce Growth or Advanced license, available starting in December 2024. For all other licenses or existing stores, contact your Salesforce representative to get access to Commerce Messaging.
- Commerce Messaging uses Marketing messaging services to send customer notifications. Marketing messaging services use Data Cloud.
- An enhanced CMS Workspace is required.
- To prevent sending duplicate messages to your customers, disable any external or third-party messaging services before you enable a message template.

Order Confirmation Email

- If an order is placed on a PayNow store, the View Order Status button in the order confirmation email doesn't work. You must remove the View Order Status button from the Order Confirmation Email template for that store.
- The unsubscribe component isn't available in the provided transactional message template.

Set Up an Email Domain for Commerce Messaging

To provide a branded experience for customers who receive your messages, you can use a custom email domain for each store.

Your custom email domain must match your store site's domain. If the domains don't match, noreply@salesforce.com is used. For more information, see Authenticate a Domain for Unified Messaging.

SEE ALSO:

Customize Notification Templates in Commerce Messaging

Reinstall Commerce Messaging

Customize Notification Templates in Commerce Messaging

Automate customer notifications and use consistent messaging. Use the provided templates to customize your message.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select **Settings** > **Messaging**.
2. Within a message template, click **Edit**. Content Builder opens where you can customize your template. For more information, see Content Builder.
3. After you've customized your template, save your work and click **Back** to return to the Messaging Workspace.

4. Enable the template to automatically start the sending of messages.

SEE ALSO:

Set Up an Email Domain for Commerce Messaging

Reinstall Commerce Messaging

Reinstall Commerce Messaging

Messaging is automatically enabled, but if you don't see message templates in the Messaging Workspace, try reinstalling the Messaging package.

1. From Setup, in the Quick Find box, enter `Commerce Setup Assistant`, and then select **Commerce Setup Assistant**.
2. On the Additional Setup tab, locate Install Commerce Messaging.
3. Click **Install Messaging** or **Retry Installation**.

If retrying the installation fails or if the status is already Installed and you still don't see the message templates, contact Salesforce Customer Support.

SEE ALSO:

Set Up an Email Domain for Commerce Messaging

Customize Notification Templates in Commerce Messaging

Create Order Confirmation Emails with an LWR Template

You can use an LWR template to manually create a confirmation email to send to customers when they submit an order.

Tip: To use the latest customer notification features, navigate to the Commerce Messaging Workspace. For more information, see Automate Customer Notifications in the Commerce Messaging Workspace.

1. Go to GitHub for Commerce on Lightning.
2. Open and review the Order Confirmation Email Notification Implementation README file.
3. Use the provided files to set up an end-to-end notification strategy so that customers receive a confirmation email when checkout is completed.

SEE ALSO:

Automate Customer Notifications in the Commerce Messaging Workspace

Displayable Fields for Commerce Stores

Displayable fields help to decrease page load times and retrieve product data faster on search, product, cart, and checkout pages.

Set Up Displayable Fields in Commerce (Beta)

Set up the category, custom, and standard product fields that you want to enable as displayable on your search, product, cart, and checkout pages.

Configure Product Fields for Search Results in a Commerce Store (Beta)

Configure the standard product fields that you want to display in the search results on your search, product, cart, and checkout pages.

Enable Displayable Fields in Commerce (Beta)

Enable displayable fields to decrease page load times and retrieve product data faster on search, product, cart, and checkout pages.

Configure Displayable Fields in Commerce (Beta)

Before you enable displayable fields for your org, you must set up displayable fields in the Commerce App and configure product fields in Experience Builder for all of your stores. You can complete steps 1 and 2 in either order, but the product fields that you configure in Experience Builder must be set up as displayable before you enable displayable fields to see improvements on your search, product, cart and checkout pages.

Set Up Displayable Fields in Commerce (Beta)

Set up the category, custom, and standard product fields that you want to enable as displayable on your search, product, cart, and checkout pages.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

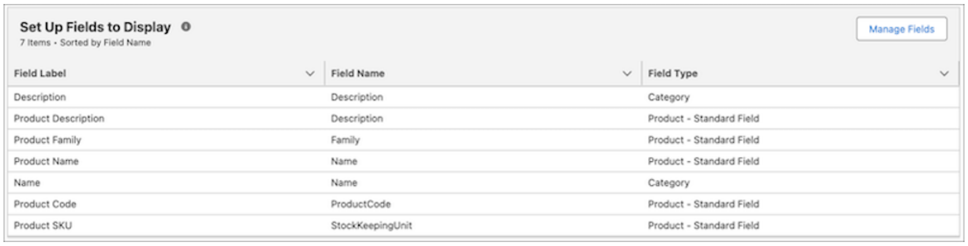
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: Displayable Fields is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Displayable Fields**.
3. Click **Manage Fields**.



Set Up Fields to Display

7 Items • Sorted by Field Name

Field Label	Field Name	Field Type
Description	Description	Category
Product Description	Description	Product - Standard Field
Product Family	Family	Product - Standard Field
Product Name	Name	Product - Standard Field
Name	Name	Category
Product Code	ProductCode	Product - Standard Field
Product SKU	StockKeepingUnit	Product - Standard Field

4. Add the Category Description, Category Name, Product Code, Product Description, Product Family, Product Name, and Product SKU fields.

   If you’re creating a new store, these fields are set up as displayable by default.

5. Select any other fields that you want to use in your store as displayable fields.

   You can have up to 100 displayable fields. You can’t use the Auto Number, Roll-Up Summary, Geolocation, Text Area (Rich), and Text (Encrypted) custom fields as displayable fields.

6. Save your changes.

SEE ALSO:

Configure Product Fields for Search Results in a Commerce Store (Beta)

Enable Displayable Fields in Commerce (Beta)

Configure Product Fields for Search Results in a Commerce Store (Beta)

Configure the standard product fields that you want to display in the search results on your search, product, cart, and checkout pages.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

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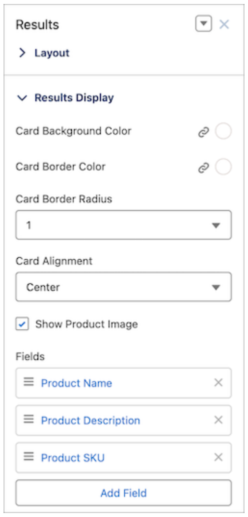
1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. Open the search page.
4. In the Results component, in the Results Display section, click **Add Field**.

   You can add up to four standard product fields. You can't configure category, custom, or individual variation attribute fields. When you enable grouping, best-matched products across all variants or parents in the group display on the search, product, cart and checkout pages. Make sure that the standard product fields you configure in Experience Builder are set up as displayable. See Set Up Displayable Fields in Commerce (Beta) on page 251.



Card Border Radius: 1

Card Alignment: Center

☑ Show Product Image

Fields:
- Product Name
- Product Description
- Product SKU

   Note: To configure displayable fields, you must use the Results component. The Results Grid component doesn't support displayable fields.

5. To edit the field, click the field name. You can change the field, display name, text size, and text color.
6. Repeat these steps for each displayable field.
7. Publish your store.

The fields are now visible to customers, but they aren’t enabled as displayable fields.

SEE ALSO:

Enable Displayable Fields in Commerce (Beta)

LWR Store Components

Enable Displayable Fields in Commerce (Beta)

Enable displayable fields to decrease page load times and retrieve product data faster on search, product, cart, and checkout pages.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

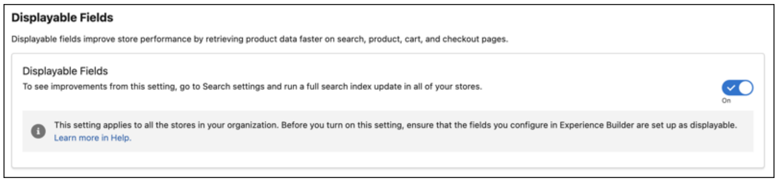
Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: Displayable Fields is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

1. In the navigation sidebar, select any store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Displayable Fields**.
3. Turn on **Displayable Fields**.

   This setting applies to all the stores in your org.



Displayable Fields

Displayable fields improve store performance by retrieving product data faster on search, product, cart, and checkout pages.

Displayable Fields

To see improvements from this setting, go to Search settings and run a full search index update in all of your stores.

This setting applies to all the stores in your organization. Before you turn on this setting, ensure that the fields you configure in Experience Builder are set up as displayable. Learn more in Help.

4. Update the search index using the Full Update method.

   Displayable fields can increase the time needed to update the search index. See Update the Commerce Search Index on page 177.

SEE ALSO:

Set Up Displayable Fields in Commerce (Beta)

Configure Product Fields for Search Results in a Commerce Store (Beta)

Configure Displayable Fields in Commerce (Beta)

Before you enable displayable fields for your org, you must set up displayable fields in the Commerce App and configure product fields in Experience Builder for all of your stores. You can complete steps 1 and 2 in either order, but the product fields that you configure in Experience Builder must be set up as displayable before you enable displayable fields to see improvements on your search, product, cart and checkout pages.

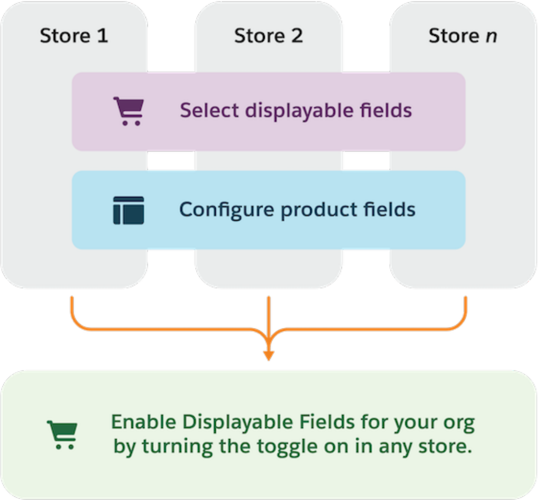
Note: Displayable Fields is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce


Store 1
Store 2
Store *n*
Select displayable fields
Configure product fields
Enable Displayable Fields for your org by turning the toggle on in any store.

Set Up Displayable Fields

1. In the Commerce App, select displayable fields.

   See Set Up Displayable Fields in Commerce (Beta) on page 251.

Configure Product Fields

1. In Experience Builder, configure product fields.

   See Configure Product Fields for Search Results in a Commerce Store (Beta) on page 252.

   Important: Repeat steps 1 and 2 for all of your stores before completing the next step.

Enable Displayable Fields

1. In the Commerce App, enable displayable fields.

See Enable Displayable Fields in Commerce (Beta) on page 253.

SEE ALSO:

Displayable Fields for Commerce Stores

Get Help with Product Visibility Issues with the Troubleshooting Assistant

To troubleshoot issues with product visibility, ask the Troubleshooting Assistant for help. The Troubleshooting Assistant can help you determine whether a buyer or guest customer can see a product in the store. The Troubleshooting Assistant displays the tasks required to configure a store and its products and which of those tasks have been completed.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Troubleshooting Assistant**.
3. In the Troubleshooting Assistant section, select the issue that you want help with.
4. Search for and enter the product.
5. Search for and enter the store.
6. If applicable, search for and enter the user who that you want to see the product.
7. Click **Submit**.

   The Results panel shows the product's status and identifies tasks that aren't complete.

SEE ALSO:

Commerce Workspaces

Using Salesforce CMS for Product Media

A Content Management System (CMS) workspace offers a secure environment to create, edit, organize, and manage digital content. When you create a store, a CMS workspace for the store and a public channel from the store to that workspace are added. You can upload or import product media from a CMS workspace into your store.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

A store can access content from all workspaces that include the store's public channel. You can change the public channel assigned to the store. See Assign a CMS Public Channel to a Commerce Store.

To add the store's public channel to a workspace, see Add a Channel to a CMS Workspace.

When you use a CSV file to import images globally for all stores, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the global import process. See Create a CMS Workspace to Import Images to a Commerce

Store. When you import to a store, you must use the default workspace for that store. You can't specify that the import process use a different workspace.

SEE ALSO:

CMS Content

Assign a CMS Public Channel to a Commerce Store

When you create a store, a CMS workspace and a public channel to the workspace are added. If you have an LWR store built on an enhanced LWR site, you can change the public channel. A store can access content from all CMS workspaces that include the store's public channel.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. Under CMS Public Channel, select an enhanced CMS public channel for the store.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Using Salesforce CMS for Product Media

Commerce Workspaces

Multiple workspaces come together in the Commerce app to make workflows more efficient, make information easier to find and update, and to organize shared contents.

Manage Pricing in the Pricing Workspace

You can manage all price books and price book entries in your organization in the Pricing Workspace. You can filter the list by a specific store.

Manage Categories in the Category Workspace

The Category workspace shows a hierarchical view of your categories, subcategories, and the number of products in each. Use this view to visually validate your category organization, identify overlaps, and make changes.

Manage Products in the Product Workspace

The Product Workspace displays all products in your organization. You can add filters and adjust which columns to display. Apply the preconfigured quick filters or add your own filters. Update multiple products, add new products, edit fields for products, and create variation products. Use Bulk Actions and perform actions on multiple products in bulk.

Search the Product Workspace

Use the search box to search fields in the product workspace.

Manage Promotions with the Promotion Workspace

The Promotion Workspace consolidates all your promotions in one place. You can use filters to focus on a particular store, buyer group, or promotion field. Quickly see which promotions are active, and change the status of multiple promotions at the same time. Create promotions or edit existing ones.

Manage Buyers and Shoppers in the Customer Workspace

The Customer Workspace displays accounts enabled as buyers and the accounts of registered shoppers for D2C stores. The Customer Workspace also displays buyer groups. Using the Customer Workspace, you can assign customers to buyer groups and assign buyer groups to stores. You can add filters and adjust which columns to display in the workspace.

Manage Pricing in the Pricing Workspace

You can manage all price books and price book entries in your organization in the Pricing Workspace. You can filter the list by a specific store.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

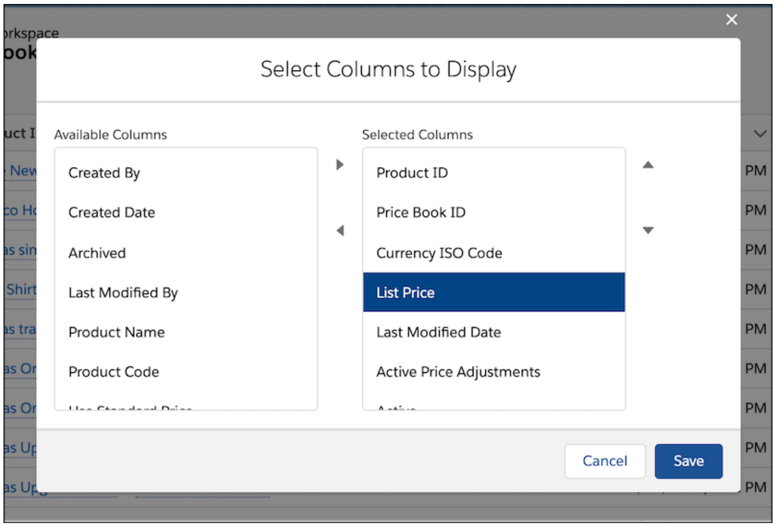
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

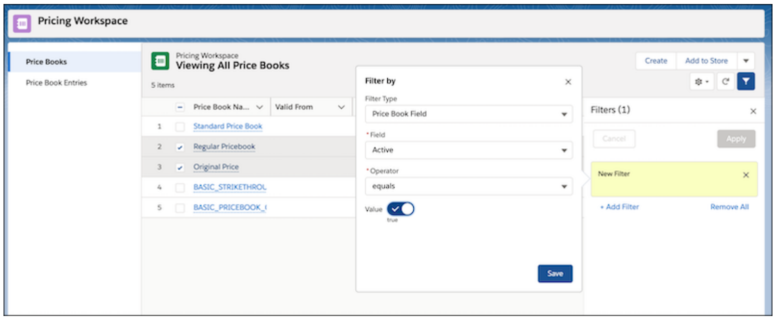
1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Pricing**.
3. Customize the information displayed.



   a. Click the gear icon, and select **Select Columns to Display**.
   b. Use the arrows to move items between Available Columns and Selected Columns.
   c. Click **Save**.

   You can change the column view for price books and price book entries separately.

4. From the left pane, select **Price Books**.
   - To create a price book, click **New** at the top of the screen.
   - To associate a price book to a store, click **Add to Store**.
5. Create a filtered list to surface price books or price book entries with specific properties or associations.



	Price Book Na...	Valid From
1	☐ Standard Price Book	
2	☑ Regular Pricebook	
3	☑ Original Price	
4	☐ BASIC_STRIKETHROL	
5	☐ BASIC_PRICEBOOK_(	

Filter Type: Price Book Field
* Field: Active
* Operator: equals
Value: true

a. Click the filter icon.

b. Click **Add Filter**.

c. Select a filter type, and edit the filter values as needed.

d. After you create your filter, click **Save**.

e. To apply the filter, click **Apply**.

6. Apply an action to one or more price books in the list.

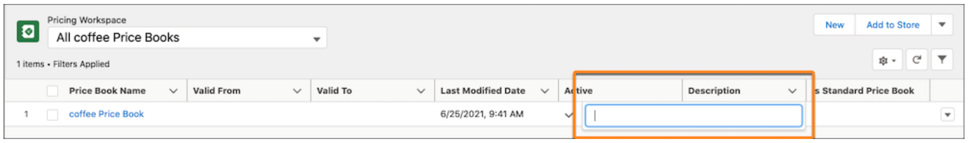
   a. Check the box next to the price book or price books you want to update.

   b. Click the dropdown arrow in the action buttons at the top of the screen.

   c. Select an action.

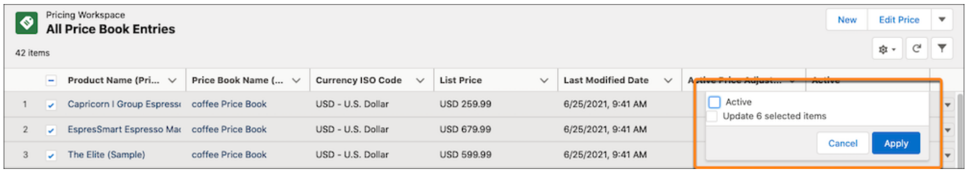
7. Edit one or more fields in the price book or price book entry list.

   a. To open a field for editing, hover your cursor over the field and click the pencil icon.



	Price Book Name	Valid From	Valid To	Last Modified Date	Active	Description	s Standard Price Book
1	☐ coffee Price Book			6/25/2021, 9:41 AM			

   b. To update multiple fields with the same value, select the items, click the pencil icon, and then select the option to update all selected items.



	Product Name (Pri...	Price Book Name (...	Currency ISO Code	List Price	Last Modified Date	Active Price Adjust...	Active
1	☑ Capricorn I Group Espress	coffee Price Book	USD - U.S. Dollar	USD 259.99	6/25/2021, 9:41 AM		
2	☑ EspresSmart Espresso Ma	coffee Price Book	USD - U.S. Dollar	USD 679.99	6/25/2021, 9:41 AM		
3	☑ The Elite (Sample)	coffee Price Book	USD - U.S. Dollar	USD 599.99	6/25/2021, 9:41 AM		

☐ Active
☐ Update 6 selected items

   c. Click **Save**.

8. Select **Price Book Entries** from the left pane.

   - To create a price book entry, click **New** at the top of the screen. When you create entry, associate it with a price book.

- To change multiple prices at once, select the price book entries and then click **Edit Price**. Choose to change pricing by a percentage or by a set amount. For example, reduce all prices by 10% or $10.00.

SEE ALSO:

Commerce Workspaces

Manage Categories in the Category Workspace

The Category workspace shows a hierarchical view of your categories, subcategories, and the number of products in each. Use this view to visually validate your category organization, identify overlaps, and make changes.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Merchandising** > **Categories**.
3. Select the columns that you want to show in the workspace.
   a. Click ⚙ and select **Select Columns to Display**.
   b. Use the arrows to move items between Available Columns and Selected Columns.
   c. Click **Save**.
4. Choose how to sort the categories.
   a. Click **Sort**.
   b. Drag and change the sort order.
   c. Click **Save**.
5. Add subcategories.
   a. Click ▾ for a category, and select **Add Subcategory**.
   b. Enter the category details.
   c. Click **Save**.
6. Add a category to the workspace.
   a. Click **New**.
   b. Enter the category details.
   c. Click **Save**.
7. Import categories to the workspace from a CSV file.
   a. Click **New**.
   b. Click **Upload Files** and select the CSV file that contains the category data.

      You can optionally download a sample data import file as a starting point for creating your file.

c. Click **Import**.

SEE ALSO:

- Commerce Workspaces
- Create Product Categories and Subcategories

Manage Products in the Product Workspace

The Product Workspace displays all products in your organization. You can add filters and adjust which columns to display. Apply the preconfigured quick filters or add your own filters. Update multiple products, add new products, edit fields for products, and create variation products. Use Bulk Actions and perform actions on multiple products in bulk.

EDITIONS

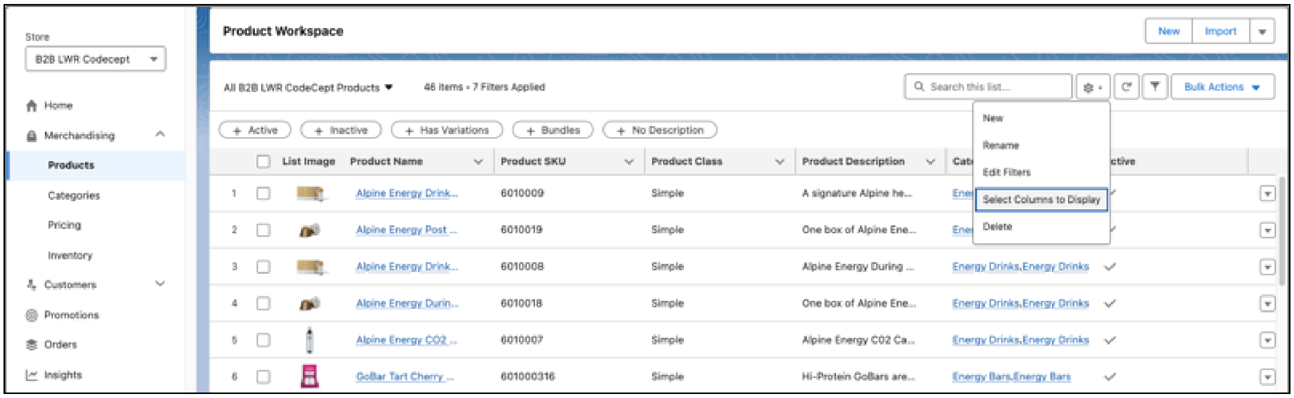
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Customize the information displayed in the workspace.
   a. Click the gear icon, and select **Select Columns to Display**.

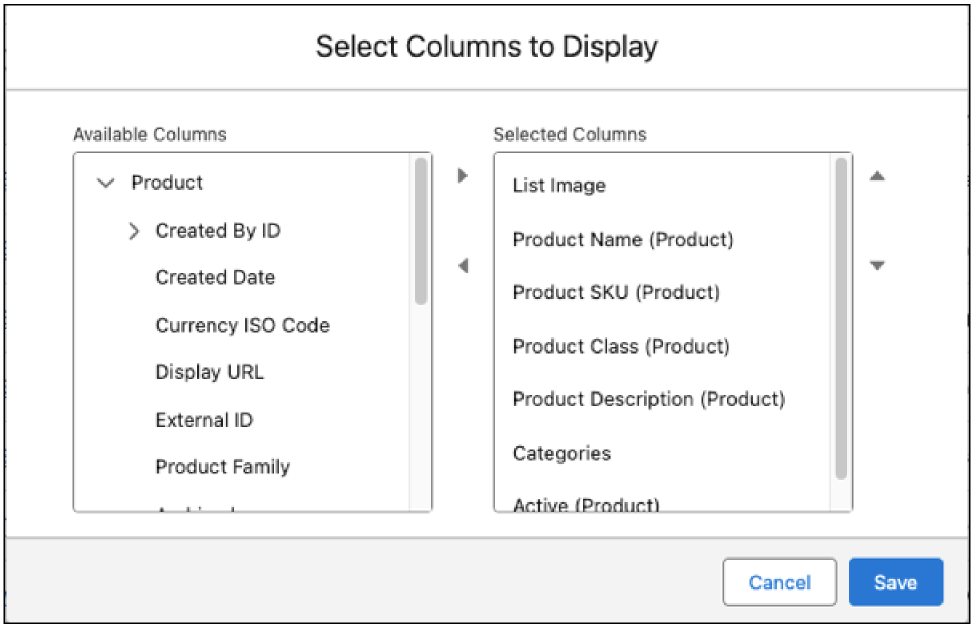


Store: B2B LWR Codecept

All B2B LWR CodeCept Products 46 items • 7 Filters Applied

	☐	List Image	Product Name	Product SKU	Product Class	Product Description	Cat	ctive
1	☐		Alpine Energy Drink...	6010009	Simple	A signature Alpine he...	Ener	✓
2	☐		Alpine Energy Post ...	6010019	Simple	One box of Alpine Ene...	Ener	✓
3	☐		Alpine Energy Drink...	6010008	Simple	Alpine Energy During ...	Energy Drinks,Energy Drinks	✓
4	☐		Alpine Energy Durin...	6010018	Simple	One box of Alpine Ene...	Energy Drinks,Energy Drinks	✓
5	☐		Alpine Energy CO2 ...	6010007	Simple	Alpine Energy C02 Ca...	Energy Drinks,Energy Drinks	✓
6	☐		GoBar Tart Cherry ...	601000316	Simple	Hi-Protein GoBars are...	Energy Bars,Energy Bars	✓

   b. Use the arrows to move items between Available Columns and Selected Columns.



Select Columns to Display

Available Columns

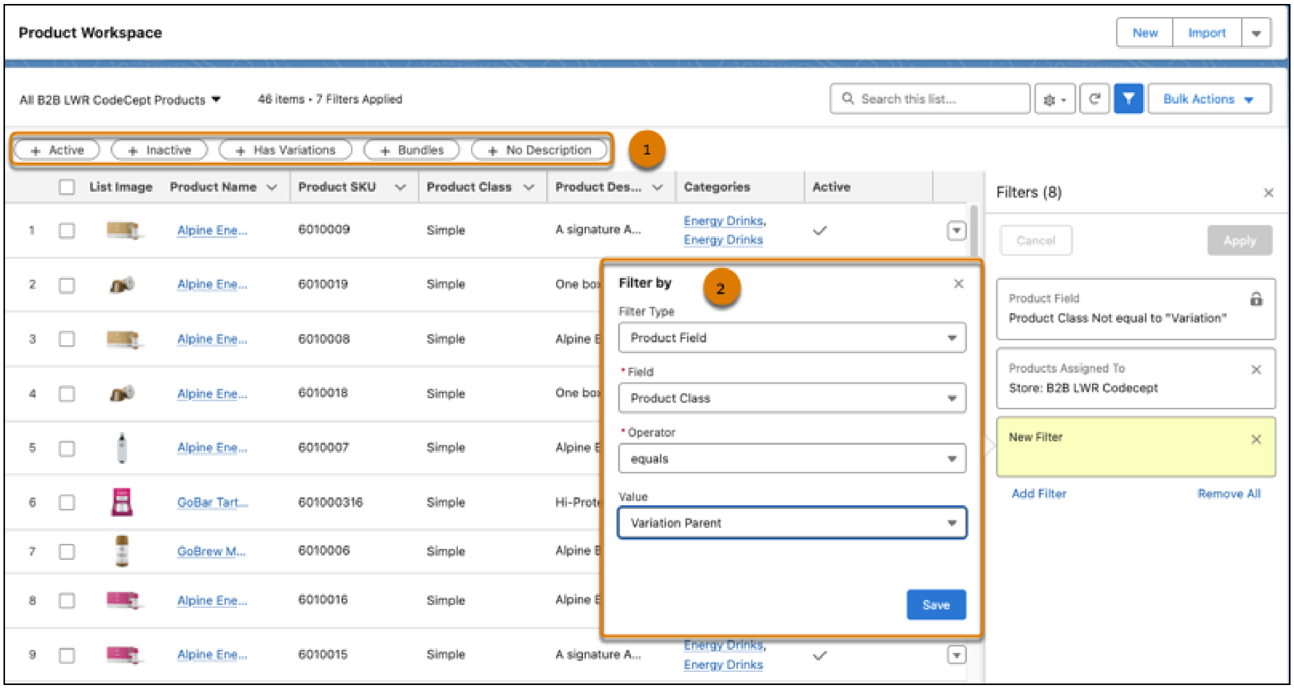
- Product
  - Created By ID
  - Created Date
  - Currency ISO Code
  - Display URL
  - External ID
  - Product Family

Selected Columns

- List Image
- Product Name (Product)
- Product SKU (Product)
- Product Class (Product)
- Product Description (Product)
- Categories
- Active (Product)

c. Click **Save**.

4. Apply the existing filters (1) or create a filtered list (2) to display products with specific properties or associations.



Product Workspace

All B2B LWR CodeCept Products

46 items • 7 Filters Applied

	List Image	Product Name	Product SKU	Product Class	Product Des...	Categories	Active
1		Alpine Ene...	6010009	Simple	A signature A...	Energy Drinks, Energy Drinks	✓
2		Alpine Ene...	6010019	Simple	One box		
3		Alpine Ene...	6010008	Simple	Alpine E		
4		Alpine Ene...	6010018	Simple	One box		
5		Alpine Ene...	6010007	Simple	Alpine E		
6		GoBar Tart...	601000316	Simple	Hi-Prote		
7		GoBrew M...	6010006	Simple	Alpine E		
8		Alpine Ene...	6010016	Simple	Alpine E		
9		Alpine Ene...	6010015	Simple	A signature A...	Energy Drinks, Energy Drinks	✓

Filter by

Filter Type: Product Field

* Field: Product Class

* Operator: equals

Value: Variation Parent

Filters (8)

Product Field
Product Class Not equal to "Variation"

Products Assigned To
Store: B2B LWR Codecept

New Filter

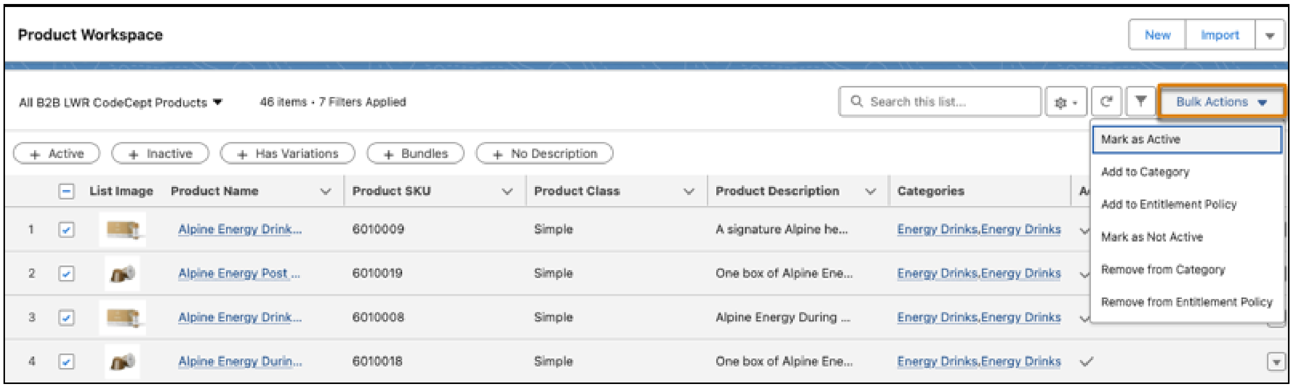
a. Click the filter icon. You can also click the gear icon and select **Edit Filters**.

b. Click **Add Filter**.

c. To quickly view product assignments, you can select a standard filter type. To customize a filter, select **Product Field**. Select the field to filter, and select the operator and the value.

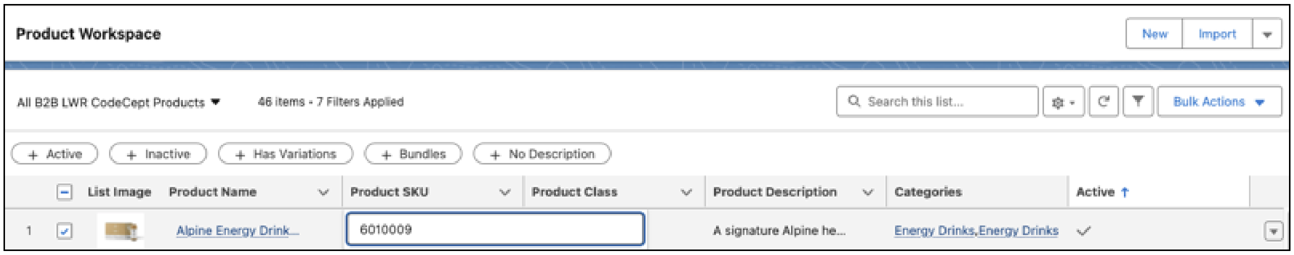
  - **d.** Click **Save**.
  - **e.** To apply the filter to your list of products, click **Apply**.

5. To create a hybrid list, click the gear icon and select **New**.
   - **a.** Name your list, and click **Save**.
   - **b.** To customize the list's columns and filters, repeat steps 3 and 4.
6. You can apply an action to one or more products in the list.
   - **a.** Check the box next to the product or products you want to update.
   - **b.** Click **Bulk Actions**.



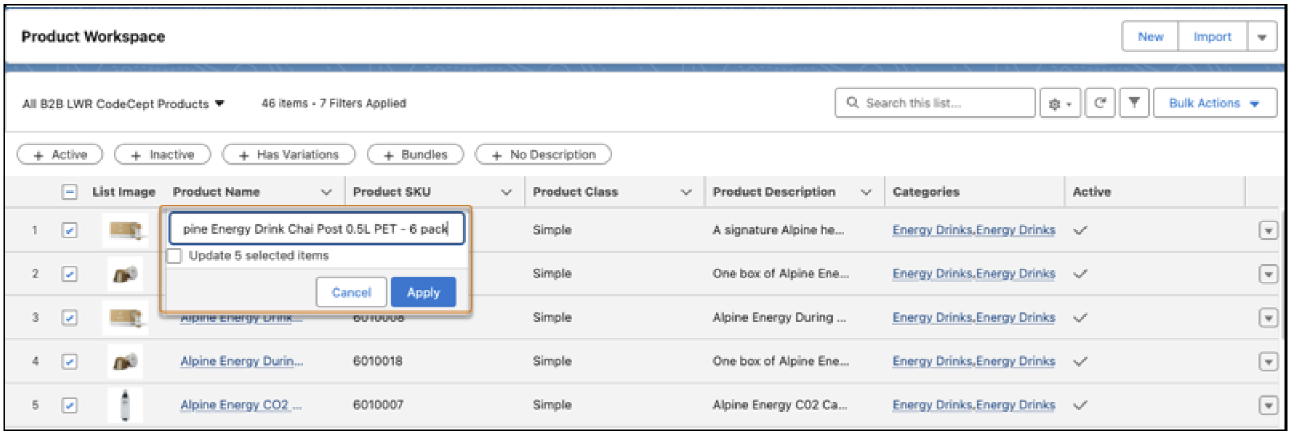
	☐	List Image	Product Name	Product SKU	Product Class	Product Description	Categories
1	☑		Alpine Energy Drink...	6010009	Simple	A signature Alpine he...	Energy Drinks,Energy Drinks
2	☑		Alpine Energy Post ...	6010019	Simple	One box of Alpine Ene...	Energy Drinks,Energy Drinks
3	☑		Alpine Energy Drink...	6010008	Simple	Alpine Energy During ...	Energy Drinks,Energy Drinks
4	☑		Alpine Energy Durin...	6010018	Simple	One box of Alpine Ene...	Energy Drinks,Energy Drinks

   - **c.** Select an action.
7. Edit one or more fields in the product list.
   - **a.** To open a field for editing, hover your cursor over the field and click ✎



	☐	List Image	Product Name	Product SKU	Product Class	Product Description	Categories	Active ↑
1	☑		Alpine Energy Drink...	6010009		A signature Alpine he...	Energy Drinks,Energy Drinks	✓

   - **b.** To update multiple fields with the same value, select the items to be edited, click the pencil icon, and then select the option to update all selected items.



pine Energy Drink Chai Post 0.5L PET - 6 pack

☐ Update 5 selected items

		List Image	Product Name	Product SKU	Product Class	Product Description	Categories	Active
1	☑				Simple	A signature Alpine he...	Energy Drinks,Energy Drinks	✓
2	☑				Simple	One box of Alpine Ene...	Energy Drinks,Energy Drinks	✓
3	☑		Alpine Energy Drink...	6010008	Simple	Alpine Energy During ...	Energy Drinks,Energy Drinks	✓
4	☑		Alpine Energy Durin...	6010018	Simple	One box of Alpine Ene...	Energy Drinks,Energy Drinks	✓
5	☑		Alpine Energy CO2 ...	6010007	Simple	Alpine Energy C02 Ca...	Energy Drinks,Energy Drinks	✓

c. Click **Save**.

8. To add a product to the workspace, click **New** from the action buttons at the top of the screen, and enter the product details.
9. To add a variation parent product, click ▼ , and then click **Create Variation Parent**. Select the product attribute set to associate with the variation parent product, enter the product details, and save your changes.

SEE ALSO:

Commerce Workspaces

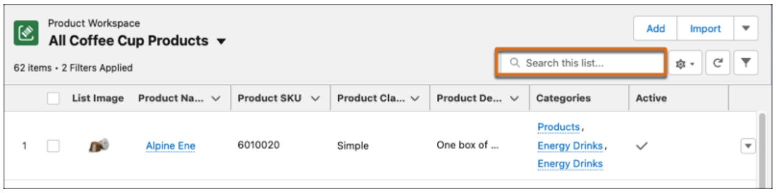
Search the Product Workspace

Search the Product Workspace

Use the search box to search fields in the product workspace.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Merchandising** > **Products**.
3. Type the term you want to search in the search box.



		List Image	Product Na...	Product SKU	Product Cla...	Product De...	Categories	Active
1	☐		Alpine Ene	6010020	Simple	One box of ...	Products, Energy Drinks, Energy Drinks	✓

The system searches for the term in all indexed columns, for example, all columns with text fields.

You can use wildcards, operators, and reserved characters. For example, you can enter these search terms.

- `("Blue" AND "Shirt")`—Finds products with the words blue and shirt in any product field.
- `60100*`—Finds SKUs with 60100 as the first numbers.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- `Sip\&Go`—Finds product with the name Sip&Go. Because the & character is a reserved character, insert a backslash (\) to indicate the literal & character and not the reserved character.

For information about which wildcards, operators, and reserved characters you can use in the product workspace search box, see FIND {SearchQuery}.

After 2 minutes, the search times out. To decrease the time required for searching, try narrowing the search term.

SEE ALSO:

Manage Products in the Product Workspace

View Which Fields Are Searchable by Object

Manage Promotions with the Promotion Workspace

The Promotion Workspace consolidates all your promotions in one place. You can use filters to focus on a particular store, buyer group, or promotion field. Quickly see which promotions are active, and change the status of multiple promotions at the same time. Create promotions or edit existing ones.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Choose which information to display by adding or removing columns.
    a. Click the gear icon, and select **Select Columns to Display**.
    b. Use the arrows to move items between Available Columns and Selected Columns.
    c. Click **Save**.
4. To filter the list:
    a. Click the filter icon, and select **Add Filter**.
    b. Select **Promotions Assigned To** or **Promotion Field**.
    c. Select the operator and value.
    d. Click **Save**.
    e. To apply the filter to your list of promotions, click **Apply**.
5. To create a promotions list, click the gear icon, select **New**, name the list, and save it
6. To activate or deactivate one or more promotions:
    a. Select the promotions.
    b. Click an action button at the top of the screen. If the action that you're looking for isn't displayed on the screen, click the dropdown arrow next to the action buttons.
    c. Choose whether to activate or deactivate the promotion.

Note: When a customer adds products to the cart, Salesforce evaluates the first 50 active manual promotions and the first 50 active automation promotions for the customer's account to determine if they apply. To improve performance, we recommend activating and prioritizing only the promotions that you need.

7. To edit a field in a promotion or promotion list, hover your cursor over it, and click the pencil icon.

   To update multiple fields with the same value, select the items to be edited, click the pencil icon, and then select the option to update the selected items.

8. To add a promotion to the workspace, click **New** from the action buttons at the top of the screen, and enter the promotion details.

SEE ALSO:

Commerce Promotions

Commerce Workspaces

Manage Buyers and Shoppers in the Customer Workspace

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

The Customer Workspace displays accounts enabled as buyers and the accounts of registered shoppers for D2C stores. The Customer Workspace also displays buyer groups. Using the Customer Workspace, you can assign customers to buyer groups and assign buyer groups to stores. You can add filters and adjust which columns to display in the workspace.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

For the Customer Workspace to display correctly, the Salesforce admin must add buyer groups as a related list on the Account page layout.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Customers**.

   The Customers tab lists accounts enabled as buyers, registered shoppers, and the buyer groups assigned to accounts. The Buyer Groups tab lists buyer groups and stores assigned to the buyer groups.

3. To add a customer account to the workspace, go to the accounts list and enable the account as a buyer.
4. To add or remove accounts from buyer groups, click **Add to Buyer Group** or **Remove from Buyer Group** at the top of the customer list.
5. To add a buyer group to the workspace, at the top of the Buyer Groups tab, click **New** and enter the buyer group details.
6. To add a buyer group to a store, at the top of the buyer group list, click **Add to Store**.
7. Customize the information displayed in the workspace.
   a. Click the gear icon, and select **Select Columns to Display**.
   b. Use the arrows to move items between Available Columns and Selected Columns.
   c. Click **Save**.
8. To display accounts assigned to a buyer group or to filter by an account field, create a filtered list.
   a. Click the filter icon. You can also click the gear icon and select **Edit Filters**.
   b. Click **Add Filter**.

   c. Select the field to filter, and select the operator and the value.
   d. Click **Save**.
   e. To apply the filter, click **Apply**.

9. Apply an action to one or more accounts or buyer groups in the list.
   a. Check the box next to the account or buyer group you want to update.
   b. Click an action button at the top of the screen.

SEE ALSO:

Commerce Workspaces

Manage Buyer Access to B2B Stores

Migrate Your Store Configuration

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

After you configure your store, you can move its configuration to a new environment, for example, from sandbox to production, by creating a change set. The change set includes the store's metadata, such as descriptions, localization, pricing, and search settings.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: Sending a change set between two orgs requires a deployment connection. You can send sets only between orgs that are affiliated with a production org. For example, a production org and a sandbox, or two sandboxes created from the same org, can send or receive change sets. For more information, see Deployment Connections for Change Sets.

1. Export the store that you want to migrate.
   a. In the navigation sidebar, select a store from the **Store** dropdown.
   b. Select **Settings** > **Store**.
   c. In the Store Migration section, under Export Store Configuration, click **Export**.
2. Create an outbound change set.
   a. In Setup, in the Quick Find box, enter `change sets`, and select **Outbound Change Sets**.
   b. Click **Continue**, and then click **New**.
   c. Add a name and description for your change set, and click **Save**.
   d. Under Change Set Components, click **Add**.
   e. For Component Type, select **Site.com**.
   f. Select the store that you want to migrate, and click **Add to Change Set**.
   g. Click **Add**, and for Component Type, select **Store Configuration**.
   h. Make sure that your store is still selected, and click **Add Change Set**.
3. Apply the store configuration to a new environment.
   a. Go to the environment where you want to migrate the store configuration.

- **b.** In Setup, navigate back to Change Sets, and select **Inbound Change Sets**.
- **c.** Click **Continue**, select the change set that you created, and click **Deploy**.
- **d.** Navigate to the Commerce app navigation menu, and select **Store** > **Administration** > **General Settings**.
- **e.** Under Apply Store Configuration, click **Apply**.
- **f.** Select the store configuration, and click **Apply**.

SEE ALSO:

Store Management

Commerce Analytics

Take action on insights about revenue, product performance, and customer behavior from Commerce Analytics dashboards.

Set Up the Commerce Analytics Dashboards

Use the Commerce Analytics dashboards to monitor business performance in B2B and B2C stores.

Interpreting Commerce Analytics Dashboards

Commerce Analytics provides preconfigured dashboards composed of Lightning reports. To monitor key metrics for your stores, use the Business Overview Dashboard. For details about your store's payment processing, promotional effectiveness, and overall financial well-being, use the Commerce Payments, Promotions, and Finance dashboards.

Set Up the Commerce Analytics Dashboards

Use the Commerce Analytics dashboards to monitor business performance in B2B and B2C stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

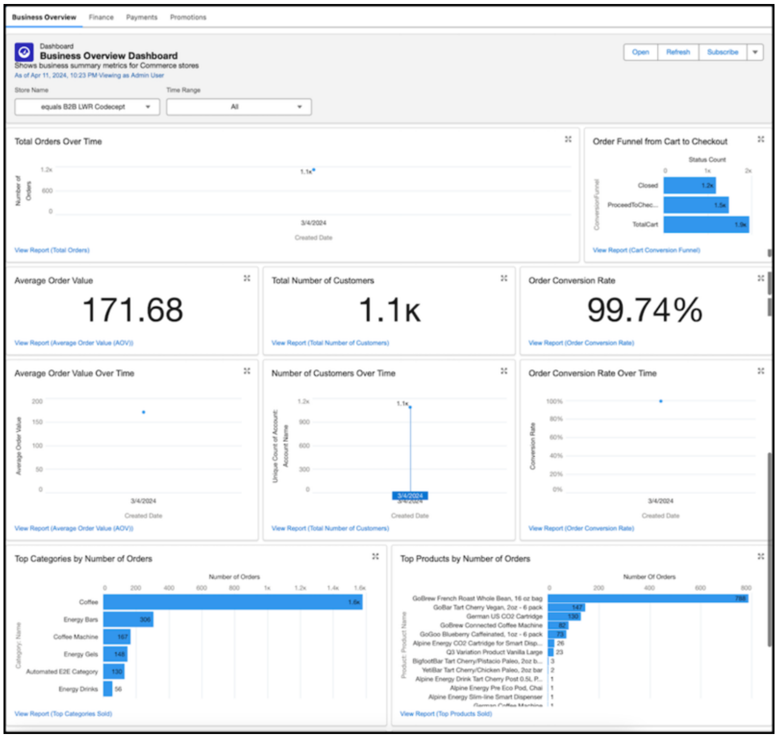
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Commerce Setup Assistant`, and then select **Commerce Setup Assistant**.
3. Select **Additional Setup** > **Install Dashboards**.

   To check the status of the installation, refresh the page. When the reports are installed, the status changes to Installed.
4. Go to your store's home page, and in the navigation menu, click **Analytics Dashboards**.
5. Click **Business Overview Dashboard**.
6. From the Time Range dropdown, select **All** to apply the time range filters to all the reports in the dashboard.
7. Click a dashboard report to open it in the Report Viewer, where you can make customizations, such as change the chart type or add filters.


Business Overview
Finance
Payments
Promotions
Dashboard
Business Overview Dashboard
Shows business summary metrics for Commerce stores
Open
Refresh
Subscribe
Store Name
Time Range
Total Orders Over Time
Order Funnel from Cart to Checkout
Average Order Value
171.68
Total Number of Customers
1.1K
Order Conversion Rate
99.74%
Average Order Value Over Time
Number of Customers Over Time
Order Conversion Rate Over Time
Top Categories by Number of Orders
Top Products by Number of Orders

SEE ALSO:

[Interpreting Commerce Analytics Dashboards]

Interpreting Commerce Analytics Dashboards

Commerce Analytics provides preconfigured dashboards composed of Lightning reports. To monitor key metrics for your stores, use the Business Overview Dashboard. For details about your store's payment processing, promotional effectiveness, and overall financial well-being, use the Commerce Payments, Promotions, and Finance dashboards.

Business Overview Dashboard

The Business Overview Dashboard includes these reports.

The default currency is USD. If your store uses multiple currencies, a conversion is applied to aggregate the calculations.

Report Name	Description
Total Orders	The total number of orders placed in your store or stores. Use the Total Orders report to track sales trends by charting the metric over different time periods.
Order Funnel	The percentage of carts converted from cart, to checkout, to order in your store or stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Report Name	Description
Average Order Value (AOV)	The average value of orders placed by customers in your store or stores. Order value excludes the cost of tax and shipping. Use the AOV and Total Order Value reports to assess your customers' spending habits over time.
Total Order Value	The total value of all orders placed in your store or stores. Order value excludes the cost of tax and shipping.
Total Number of Customers	The total number of customers for your store or stores over time. The number is calculated as the count of unique customer IDs from purchases within the specified timeframe.
Order Conversion Rate	The percentage of carts converted to orders in your store or stores. Use the Order Conversion Rate and Cart Conversion Funnel to identify opportunities for improving the checkout process.
Top Categories Sold	The most popular product categories by number of orders.
Top Products Sold	The most popular products by number of orders.
Top Promotions by Orders	The promotions applied to the most orders. This calculation includes both manual and automatic promotions. Automatic promotions apply to all eligible carts. Manual promotions require a coupon code that the customer enters.
Top Coupons by Orders	The coupons applied to the most orders. This calculation includes only manual promotions.

Commerce Payments Dashboard

The Commerce Payments Dashboard includes these reports.

The default currency is USD. If your store uses multiple currencies, a conversion is applied to aggregate the calculations.

Report Name	Description
Payment by Status	The current state of your transactions (for example, Authorized, Refunded, or Canceled).
Payment Authorization Amount	The total value of all authorized payments.
Payment Capture Amount	The total value of all captured payments.
Payment Refund Amount	The total value of all refunded payments.
Payment Authorization by Gateway	Monitor the success rate of payment authorizations for each payment gateway.
Payment Capture by Gateway	Track how customers use specific payment gateways to initiate purchases.
Payment Transaction by Store	The payment transactions across your different stores.

Commerce Finance Dashboard

The Commerce Finance Dashboard includes these reports.

The default currency is USD. If your store uses multiple currencies, a conversion is applied to aggregate the calculations.

Report Name	Description
Gross Sales	The total value of all your sales before subtracting discounts, taxes, or shipping costs.
Discounts	The total amount deducted from your gross sales price due to line-item discounts and cart-wide discounts.
Net Sales	The total value of your gross sales after deducting the discounts.
Taxes	The total value of taxes associated with the sales.
Total Sales Over Time	The total value of sales over time.
Breakdown of Total Sales	A comprehensive view of your gross sales, discounts, taxes, returns, and shipping in a stacked format.
Breakdown of Net Sales	A comprehensive view of your net sales in a stacked format.

Commerce Promotions Dashboard

The Commerce Promotions Dashboard includes these reports.

The default currency is USD. If your store uses multiple currencies, a conversion is applied to aggregate the calculations.

Report Name	Description
Net Sales with Promotions and Coupons	The net revenue generated from orders placed using any type of promotion or coupon.
Net Sales without Promotions and Coupons	The net revenue generated from orders placed without using a promotion or coupon.
Coupon Usage Details	Details of coupon redemptions.
Taxes	The total value of taxes associated with the sales.
Total Sales Over Time	The total value of sales over time.
Breakdown of Total Sales	A comprehensive view of your gross sales, discounts, taxes, returns, and shipping in a stacked format.
Breakdown of Net Sales	A comprehensive view of your net sales in a stacked format.

SEE ALSO:

Set Up the Commerce Analytics Dashboards

Create Custom Reports with Search and Category Data for B2B Stores

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

Use the data to analyze your buyers' interactions with the products in your store. Discover things like:

- What buyers are searching for most
- What buyers are searching for but not finding
- The product types that buyers are looking for
- The specific products that buyers are looking for

This table lists the data categories and the types of events that are captured.

Event Category	Event Action	Event Label	Reports On
Search Results Interactions	Search Results Page View	*{search term}*	Search term entered that resulted in the page view
	No Results Page View	*{search term}*	Search term entered that landed the user on the no-results page
	Result Click	*{search term}*	Search term entered that resulted in the clicking of a search result
	Add To Cart Button Click	*{search term}*	Search term entered that resulted in the clicking of the Add to Cart button
	Category Filter Click	*{<search term>:<selected category name>}*	Search term entered and the category name that the user clicked
	Attribute Filter Click	*{<search term>:<selected value1,selected value2>}*	Search term entered and the attribute values that the user clicked
	Sort Option Click	*{<search term>:<sort option name>}*	Search term entered and the sort option that the user clicked
Product Category Interactions	Category Detail Page View	*{category name}*	Name of the category in the detail view

	Product Click	*{category name}*	Name of the category under which a product was clicked
	Add To Cart button Click	*{category name}*	Name of the category under which an Add to Cart button was clicked
	Category Filter Click	*{<root category name>:<selected category name>}*	Search term entered and the category name that the user clicked
	Attribute Filter Click	*{<root category name>:<selected value1,selected value2>}*	Search term entered and the attribute values that the user clicked
	Sort Option Click	*{<root category name>:<sort option name>}*	Root category searched and the sort option that the user clicked

For information about Google Analytics, see Google Analytics Documentation.

SEE ALSO:

Store Management

Manage Integrations for Your Store

Your B2B or D2C store requires several integrations to function properly.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

You can link integrations that are set up in advance by a developer. For more information, see B2B Commerce and D2C Commerce Developer Guide.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. Click the integration type that you want to manage.

   Some integrations are managed from the Extensions page. See Replace a Default Commerce Process with an Apex Class.

4. Click **Link Integration**.
5. Verify that you selected the correct integration, and click **Confirm**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

To change the integration, select **Edit** from the dropdown, select the integration, and save your changes. To disconnect an integration from your store, select **Unlink**.

SEE ALSO:

Store Management

B2B Commerce Checkout Flow (Aura)

Add a Payment Service for a Commerce Store

Add a Third-Party Shipping Service for a Commerce Store

Add a Tax Calculation Service for a Commerce Store

Set Up Inventory for Commerce Stores

To integrate inventory with your store, use Omnichannel Inventory or a custom provider. Use the Commerce Setup Assistant to quickly configure default settings in Omnichannel Inventory. You can also manually configure your store to add custom integrations.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Set Up Inventory Using the Commerce Setup Assistant

The Commerce Setup Assistant configures most of the settings required to use Omnichannel Inventory. Some manual steps are required to complete the implementation.

Manually Set Up Inventory for a Commerce Store

You can manually configure Salesforce Omnichannel Inventory or a third-party inventory service if you don't want to use the Commerce Setup Assistant.

Set Up Inventory Using the Commerce Setup Assistant

The Commerce Setup Assistant configures most of the settings required to use Omnichannel Inventory. Some manual steps are required to complete the implementation.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. Run the Commerce Setup Assistant if you haven't already.
    a. From Setup, in the Quick Find box, enter `Commerce Setup Assistant`.
    b. On the Salesforce Commerce Setup tile, click **Get Started**.
2. When the Commerce Setup Assistant finishes and you've created your store, sync location information with Omnichannel Inventory.

    A default location group (store name) and fulfillment location (warehouse) were created for your storefront.

    a. In the navigation sidebar, select a store from the Store dropdown.
    b. Select **Settings** > **Store**.
    c. On the Inventory tab, click **Location Management** and then **Commit Changes**.

    When you add or make changes to locations or location groups, you must commit the changes for them to be available in Omnichannel Inventory.

3. Add inventory SKUs.

   You can add up to 20 SKUs at a time.

   a. In the navigation sidebar, select a store from the Store dropdown.
   b. Select **Merchandising | Inventory**.
   c. Click **Add Inventory**.
   d. Select a location and enter a SKU that matches the SKU from your product catalog.
   e. Add quantity on hand and safety stock information.
   f. To add another item, click **Add SKU**, or click **Save**.

4. Turn on the inventory service so that the storefront can check for item availability.

   If you don't turn on inventory, fulfillment orders aren't created.

   a. In the navigation sidebar, select a store from the Store dropdown.
   b. Select **Settings | Store**.
   c. On the Inventory tab, click **Turn On**.

      If the button isn't available and you see an error message, you don't have field-level security to turn on the inventory service.

SEE ALSO:

Manually Set Up Inventory for a Commerce Store

Manually Set Up Inventory for a Commerce Store

You can manually configure Salesforce Omnichannel Inventory or a third-party inventory service if you don't want to use the Commerce Setup Assistant.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Note: To enable inventory, the Web Store Inventory Source field-level security permission for the Enabled field is required. You can configure settings and select a provider without this permission.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and click **Inventory**.
3. Enter general provider settings.
   - Location Source: Default location or location group for inventory reservations. Required.
   - Inventory Dimension: Fulfillment options.
     - On Hand: Inventory available, not counting Future Inventory or Quantity Reserved.
     - Available to Fulfill (ATF): Inventory that can be fulfilled now.
     - Available to Order (ATO): Inventory that can be ordered. Default option if no dimension is selected.
   - Reservation Duration (Seconds): Amount of time a reservation is held between 300 and 14,400 seconds. Required.

- Inventory Cache Time To Live (Seconds): Amount of time inventory values are kept in the cache. When the time expires, the cache doesn't return a value for the requested inventory key and a new inventory value is requested. Must be between 300 and 14,400 seconds. The default setting is 2400 seconds.

4. Click **Save**.

   Fields that aren't required are filled with default values if left blank.

5. Configure Salesforce Omnichannel Inventory or create an extension point to connect your custom inventory provider. See Salesforce Commerce Extensions.
6. To turn on inventory, click **Turn On**.

You can use AppExchange package to integrate a third-party service. If you prefer to integrate a third-party service without using AppExchange, see examples in GitHub.

- Reference Implementations for B2B Commerce
- Reference Implementations for D2C Commerce

For information about implementing Omnichannel Inventory, see Salesforce Omnichannel Inventory Implementation Guides.

To set up an integration, see B2B Commerce and D2C Commerce Developer Guide.

SEE ALSO:

Set Up Inventory Using the Commerce Setup Assistant

Replace a Default Commerce Process with an Apex Class

Use extension points to enhance or replace default Salesforce Commerce processing with Apex classes. For example, by default Salesforce Commerce uses standard Salesforce price books to determine how products are priced. If you want to use a different pricing method, you can use an Apex class for pricing instead.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. Click the **Extensions** tab.
4. On the tile that lists the extension point, click **Select Provider**.
5. Select the Apex class for the extension point.
6. Click **Next** and then confirm your selection.
7. To change or remove the provider, use the dropdown menu on the extension tile.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Manage Integrations for Your Store

Configure What Shoppers or Buyers See When a Store Isn't Available

When a CDN is enabled for your store, the Service Not Available page is available in Experience Builder for you to customize with your own brand and message. Shoppers and buyers see the Service Not Available page when your store is unavailable.

For more information about the Service Not Available page, see Service Not Available Page.

SEE ALSO:

Use Experience Builder to Design a Commerce Store

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Commerce Promotions

Add promotions to your B2B or D2C store. Customize segments, discounts, qualifiers, and coupons to make sure that the right customers receive the right deals. Design your store pages and checkout flows to highlight promotions for eligible customers.

Considerations for Commerce Promotions

Promotions help to influence purchases and retain customer loyalty. When you create a commerce promotion, you configure the discount, when to apply it, who can receive it, and whether to require a coupon.

Configure a Promotion

Create a promotion. Then configure its segments, discounts, qualifiers, and coupons.

Customize Promotions in Experience Builder

Edit your store pages and components to customize how eligible customers see promotions.

Promotions in Checkout for B2B (Aura) Stores

If you have a B2B store created using the Aura template, make sure that your checkout flow is set up to handle promotions. If your B2B store uses the LWR template, promotion functionality is already built into checkout in Experience Builder

Example Promotions

When you configure a promotion, you customize it based on what you would like customers to receive and how they qualify. The examples show you how to combine basic discount and qualifier options to create different outcomes. Use them as a starting point, try your own unique combinations, and incorporate more advanced settings to create the promotions that you need.

Prioritizing Promotions

When a cart is eligible for multiple promotions, your exclusivity and priority rules determine which promotions apply.

Remove a Promotion

You can remove a promotion from your store temporarily or permanently.

Considerations for Commerce Promotions

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Promotions help to influence purchases and retain customer loyalty. When you create a commerce promotion, you configure the discount, when to apply it, who can receive it, and whether to require a coupon.

As you set up your promotion, here are some key things to consider.

- Commerce promotions are available only in English.
- Is the promotion automatic or manual? Automatic promotions apply to all eligible carts. Manual promotions require a coupon code that the customer enters.
- Who is it for? Use segments to associate your promotion with one or more stores and, if necessary, specific buyer groups.
- What will the customer receive? Specify which products to target and how much to deduct from the price. When you target a product bundle, you can only promote bundles at the parent level.
- What must a customer purchase to receive the promotion? Use promotion tiers and qualifier rules to set quantity or price minimums. Child products within a bundle can't contribute to qualifying criteria for a promotion.
- How do you want your promotion to appear to customers? Customize your cart page and other details in Experience Builder. If you're working with a B2B store created with the Aura template, configure your checkout to include promotions.

Usage Notes

- The Promotion object is shared between Commerce, Loyalty, and Retail Execution platforms in Salesforce.
- For a B2B store created with the Aura template, make sure that your checkout flow is set up to include promotions. See Add a Checkout Flow to a B2B Store.
- Customers are eligible for 24 product-level promotions and one order-level promotion per cart. This limit includes a maximum of two coupons.
- Each line item in a cart is eligible for only one class-exclusive product-level promotion. This behavior can be customized via the Promotion Exclusivity field. See Prioritizing Promotions.
- If a cart includes an item with a negative price value, the cart isn't eligible for a promotion.
- Promotions aren't evaluated or applied for carts that contain more than 10,000 items. See Enable Large Cart Support for a Commerce Store.

SEE ALSO:

Commerce Promotions

Configure a Promotion

Create a promotion. Then configure its segments, discounts, qualifiers, and coupons.

Create a Promotion

When you create a base promotion, you can activate immediately or at a later time.

Create a Promotion Using a Template

Use a template to draft a promotion with products and categories from your store.

Create Promotions with Einstein

Draft promotions with just a few clicks using Einstein and Commerce Cloud data. Quickly create basic and advanced promotions using natural language instructions and generative AI.

Einstein Prompts for Creating Promotions

When creating promotions with Einstein, use natural language text to describe the promotion.

Target Customers with a Promotion Segment

Use segments to associate your promotion with stores and buyer groups. Customers can see the promotion if they're a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active promotions.

Add a Promotion Tier

Use promotion tiers to create progressive discounts for a promotion. Apply the highest qualifying tier to a cart. You can add tiers only to a promotion that was created as a tiered promotion. All discounts within a tier must be of the same type. You can create up to 10 tiers per promotion.

Create a Coupon

Share coupon codes that customers can manually redeem in your store. The coupon has the same segment, discount, and qualifier rules as the promotion that it's associated with.

Define a Promotion Discount

Set a target for your promotion discount, choose an adjustment type, and specify how much to deduct.

Choose What Qualifies for a Promotion

Set quantity or price minimums to add purchase requirements to your promotion.

Set Conditional Rules for a Promotion

Define conditional rules on an existing promotion to create complex discounts on your products. You can include or exclude specific products, categories, and product prices.

Localize Promotion Data

You can manually enter translated text for promotion names, display names, and terms and conditions if you have Data Translation enabled.

Create a Promotion

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

When you create a base promotion, you can activate immediately or at a later time.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Click **New**.
4. Add the promotion details.
    a. For Name, enter the internal name for your promotion.
    b. For Display Name, enter a name that customers see in the cart when the promotion is in effect.

       If you leave it blank, customers don't know what discount they receive.
    c. Enter a priority number.

    The priority number determines which promotions apply first. The lower the number, the higher the priority. If you don’t enter a priority number, or if two applied promotions have the same priority, prioritization tiebreaker rules apply. See Promotion Prioritization on page 310.

    d. If you want to use qualifiers, from the Qualifier Criteria dropdown, select which qualifiers to apply: Any or All.
    e. To activate the promotion as soon as you save it, select **Active**.

       To improve performance, we recommend activating and prioritizing only the promotions that you’re using. When a customer adds products to the cart, Salesforce evaluates the first 50 active manual promotions and the first 50 active automatic promotions for their account to determine if they apply.

    f. Select **Commerce Promotion**.
    g. To combine the promotion with other promotions, for Exclusivity Type, select **No**.

       To prevent combining the promotion with promotions of the same class (for example, you want one product promotion per product or one transaction promotion per order), select **Class**. To let it be the only promotion used for an entire order, select **Global**. To use the default setting (Class), select **–None–**. See Promotion Prioritization on page 310.

    h. Enter the terms and conditions, which you can choose to show in the cart.

       To localize the promotion display name and terms and conditions, use the Translation Workbench. See Translation Workbench.

    i. Select whether to exclude qualifying items from discounts.

5. Select when to start and end the promotion.
6. Add promotion type details.
    a. To have the promotion automatically apply when qualifiers are met, select **Automatic**. If you’re requiring a coupon code, don’t select **Automatic**.

       If there are no qualifiers, the promotion applies only when eligible targets are in the cart.

    b. To make it a tiered promotion, select **Tiered Promotion**.

       This setting is permanent and can’t be changed after you save the promotion. See Add a Promotion Tier on page 286.

7. Add the redemption details. Enter the maximum number of times that the promotion can apply to a cart. The default is 1.
8. Save your work.

Example: To help your customers through the upcoming heat wave, you want to hold a sale on cooling units next week. You have a summer general sale in progress, but you want to prioritize the cooling unit promotion. When you add a promotion:

- For Priority Number, enter `1`.
- Make sure that your other active promotions have a lower priority number.
- Select **Active**.
- Enter when to start and end the promotion.
- To apply the discount when the customer adds an eligible cooling unit to their cart, select **Automatic**.

SEE ALSO:

Manage Promotions with the Promotion Workspace

Commerce Promotions

Add a Promotion Tier

Create a Promotion Using a Template

Use a template to draft a promotion with products and categories from your store.

EDITIONS

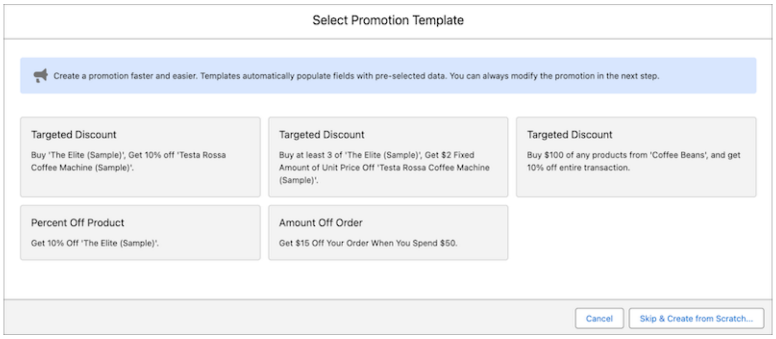
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

> Important: These steps apply to the refreshed Commerce app introduced in Summer ’24. We encourage you to use the refreshed app. If you’re still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**, and then click **Draft from Template**.
3. To create a promotion with pre-selected data, select a promotion template.



Create a promotion faster and easier. Templates automatically populate fields with pre-selected data. You can always modify the promotion in the next step.

Targeted Discount
Buy 'The Elite (Sample)', Get 10% off 'Testa Rossa Coffee Machine (Sample)'.

Targeted Discount
Buy at least 3 of 'The Elite (Sample)', Get $2 Fixed Amount of Unit Price Off 'Testa Rossa Coffee Machine (Sample)'.

Targeted Discount
Buy $100 of any products from 'Coffee Beans', and get 10% off entire transaction.

Percent Off Product
Get 10% Off 'The Elite (Sample)'.

Amount Off Order
Get $15 Off Your Order When You Spend $50.

4. On the New Promotion page, customize the fields as needed.
   a. Select the audience for your promotion.

      If you select **Specific Buyer Groups**, search for the buyer groups that you want to add. If you don’t select any buyer groups, the promotion applies to all the customers in the store.

   b. For Name, enter the internal name for your promotion.
   c. To activate the promotion as soon as you save it, select **Active**. The promotion isn’t available in your store until you activate it.

      Alternatively, you can save the promotion and activate it later. To improve performance, activate and prioritize only the promotions that you’re using. You can assign up to 50 manual and 50 automatic promotions to a store and its buyer groups.

   d. (Optional) Select whether to exclude qualifying items from a discount. For example, if this is a buy-one get-one promotion.
   e. For Display Name, enter a name for customers to see in the cart when the promotion is in effect.

      If you don’t enter a display name, customers don’t know what discount they’re receiving.

   f. (Optional) Enter the terms and conditions.

      To localize the display name and terms and conditions, see Translation Workbench.

   g. Add discounts. See Define a Promotion Discount.
   h. (Optional) Add qualifiers. See Choose What Qualifies for a Promotion.
   i. Enter a priority number.

      The priority number determines which promotions apply first. The lower the number, the higher the priority. If you don’t enter a priority number, or if two applied promotions have the same priority, prioritization tiebreaker rules apply. See Prioritizing Promotions.

   - **j.** Select an exclusivity. See Prioritizing Promotions.
   - **k.** To limit the number of times a customer can use the promotion in one cart, enter a value for Maximum Applications Per Cart.
   - **l.** Select a discount order. See Prioritizing Promotions.
   - **m.** To make sure that discounted items are cheaper than qualifying items, select a discount restriction.
   - **n.** Enter the promotion's start and end dates.
   - **o.** Save your changes.

5. Verify that the promotion details are correct on each tab (Segments, Tiers, Coupons, Discounts, and Qualifiers).
6. If you haven't already activated the promotion, when you're ready, on the Details tab, click **Active**.

   When you activate the promotion, it becomes available in your store.

SEE ALSO:

Create Promotions with Einstein

Create Promotions with Einstein

Draft promotions with just a few clicks using Einstein and Commerce Cloud data. Quickly create basic and advanced promotions using natural language instructions and generative AI.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To use generative AI, first turn on Einstein Generative AI. The EinsteinGPTCommerceAddOn license is also required to create Commerce promotions with Einstein. Contact your Salesforce Admin for help.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**, and then click **Draft with Einstein**.
3. Populate the Einstein instruction box.
   - (Optional) To create a promotion with pre-selected data, select a promotion template.
   - (Optional) To add products and categories, click **Search for products or categories** and use the search function. To select products or categories to be added to your instruction, click +. After you select products and categories, click **Insert**.
   - (Optional) Enter natural language text to describe the promotion.

EDITIONS

Available in: Lightning Experience

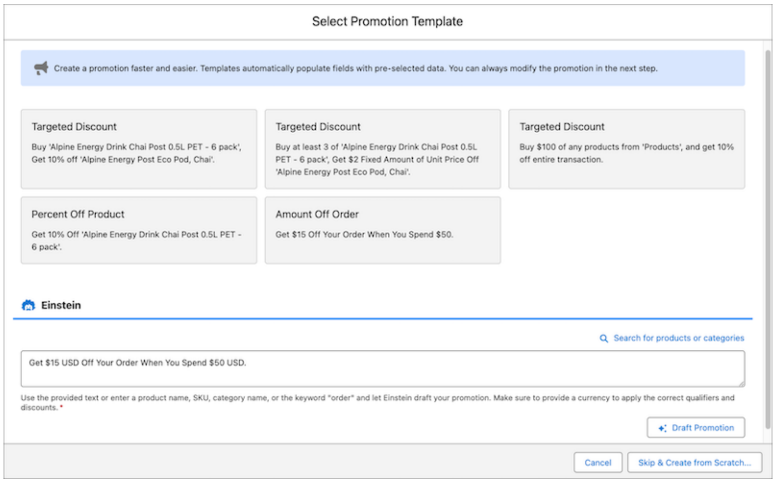
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

USER PERMISSIONS

To create promotions with Einstein:

- Smart Commerce Promotions and Recommendations



Create a promotion faster and easier. Templates automatically populate fields with pre-selected data. You can always modify the promotion in the next step.

Buy 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack', Get 10% off 'Alpine Energy Post Eco Pod, Chai'.

Buy at least 3 of 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack', Get $2 Fixed Amount of Unit Price Off 'Alpine Energy Post Eco Pod, Chai'.

Buy $100 of any products from 'Products', and get 10% off entire transaction.

Get 10% Off 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack'.

Get $15 Off Your Order When You Spend $50.

Get $15 USD Off Your Order When You Spend $50 USD.

Use the provided text or enter a product name, SKU, category name, or the keyword "order" and let Einstein draft your promotion. Make sure to provide a currency to apply the correct qualifiers and discounts. *

4. Click **Draft Promotion**.
5. On the New Promotion page, customize the fields as needed.
    - a. Select the audience for your promotion.

      If you select **Specific Buyer Groups**, search for the buyer groups that you want to add. If you don't select any buyer groups, the promotion applies to all the customers in the store.
    - b. For Name, enter the internal name for your promotion.
    - c. To activate the promotion as soon as you save it, select **Active**. The promotion isn't available in your store until you activate it.

      Alternatively, you can save the promotion and activate it later. To improve performance, activate and prioritize only the promotions that you're using. You can assign up to 50 manual and 50 automatic promotions to a store and its buyer groups.
    - d. (Optional) Select whether to exclude qualifying items from a discount. For example, if this is a buy-one get-one promotion.
    - e. For Display Name, enter a name for customers to see in the cart when the promotion is in effect.

      If you don't enter a display name, customers don't know what discount they're receiving.
    - f. (Optional) Enter the terms and conditions.

      To localize the display name and terms and conditions, see Translation Workbench.
    - g. Add discounts. See Define a Promotion Discount.
    - h. (Optional) Add qualifiers. See Choose What Qualifies for a Promotion.
    - i. Enter a priority number.

      The priority number determines which promotions apply first. The lower the number, the higher the priority. If you don't enter a priority number, or if two applied promotions have the same priority, prioritization tiebreaker rules apply. See Prioritizing Promotions.
    - j. Select an exclusivity. See Prioritizing Promotions.
    - k. To limit the number of times a customer can use the promotion in one cart, enter a value for Maximum Applications Per Cart.
    - l. Select a discount order. See Prioritizing Promotions.
    - m. To make sure that discounted items are cheaper than qualifying items, select a discount restriction.
    - n. Enter the promotion's start and end dates.
    - o. Save your changes.

6. Verify that the promotion details are correct on each tab (Segments, Tiers, Coupons, Discounts, and Qualifiers).
7. If you haven't already activated the promotion, when you're ready, on the Details tab, click **Active**.

   When you activate the promotion, it becomes available in your store.

SEE ALSO:

Einstein Prompts for Creating Promotions

Einstein Generative AI

Einstein Generative AI & Trust

Enable Einstein Generative AI

Einstein Prompts for Creating Promotions

When creating promotions with Einstein, use natural language text to describe the promotion.

EDITIONS

Available in: Lightning Experience

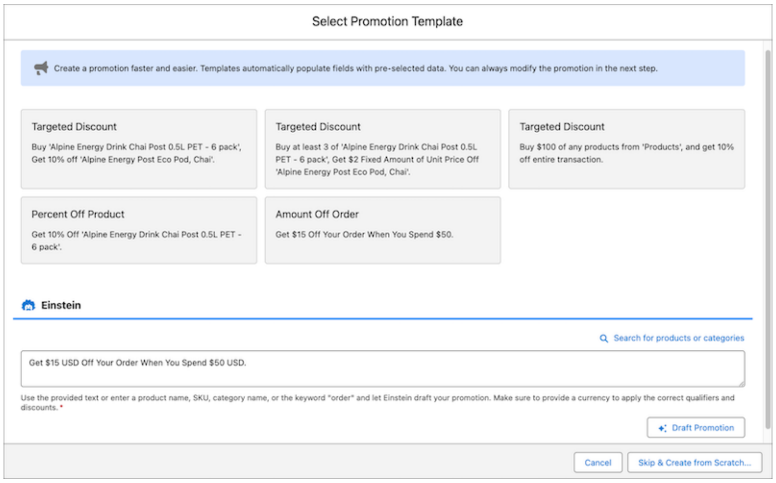
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

USER PERMISSIONS

To create promotions with Einstein:

- Smart Commerce Promotions and Recommendations



Create a promotion faster and easier. Templates automatically populate fields with pre-selected data. You can always modify the promotion in the next step.

Buy 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack', Get 10% off 'Alpine Energy Post Eco Pod, Chai'.

Buy at least 3 of 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack', Get $2 Fixed Amount of Unit Price Off 'Alpine Energy Post Eco Pod, Chai'.

Buy $100 of any products from 'Products', and get 10% off entire transaction.

Get 10% Off 'Alpine Energy Drink Chai Post 0.5L PET - 6 pack'.

Get $15 Off Your Order When You Spend $50.

Get $15 USD Off Your Order When You Spend $50 USD.

Use the provided text or enter a product name, SKU, category name, or the keyword "order" and let Einstein draft your promotion. Make sure to provide a currency to apply the correct qualifiers and discounts. *

Include specific words and phrases in your instructions.

Words and Phrases	Instruction Example
To identify a category or product, use the term “category” or “product” and put the item in single quotes.	Get 25% off the product ‘tennis shoes’.
For buy-one-get-one promotions, use “BOGO” in the instructions.	BOGO deal: Buy an ‘Alpine Energy Drink’ and get $5 USD off the second one.

Use the exact adjustment type name in your instructions.

Adjustment Type	Instruction Example
Fixed amount off unit price	Enjoy this summer promotion! Get a fixed $25 USD off the unit price on the product ‘Tennis Shoes’.
Fixed amount off transaction	Special loyal customer promotion! Get a fixed $50 USD off the transaction.
Fixed amount off line item total	Enjoy this tennis essentials promotion. Buy any items in category ‘Tennis Rackets’ and get a fixed $50 USD off the line item total.
Percentage discount	Enjoy this summer promotion! Buy a minimum of 2 product ‘Tennis Shoes’ and get 25% off.
Fixed price	Enjoy this tennis essentials promotion. Buy any product from the category ‘Tennis Balls’ and get it for a fixed price of $3 USD.
Total fixed price	Enjoy this tennis essentials promotion. Buy any 2 products from the category ‘Tennis Rackets’ and get them for a total fixed price of $75 USD.

SEE ALSO:

- Create Promotions with Einstein
- Einstein Generative AI
- Einstein Generative AI & Trust
- Enable Einstein Generative AI

Target Customers with a Promotion Segment

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Use segments to associate your promotion with stores and buyer groups. Customers can see the promotion if they're a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active promotions.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

When you assign a promotion segment to a buyer group, you can't assign the same segment to a store. Instead, associate the buyer group to the store. You can associate a promotion to multiple buyer groups.

You can't change the association between a promotion and a promotion segment. Instead, delete the promotion segment and create a new one.

You can't change the association between a promotion segment and a buyer group. Instead, delete the buyer group and assign a different one to the promotion segment.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. On the Segments tab, click **Add Promotion Segment**.
5. Click the Promotion Segment field, and select **New Promotion Segment**.

   You can also use an existing segment. Select it, save your work, and you're done.

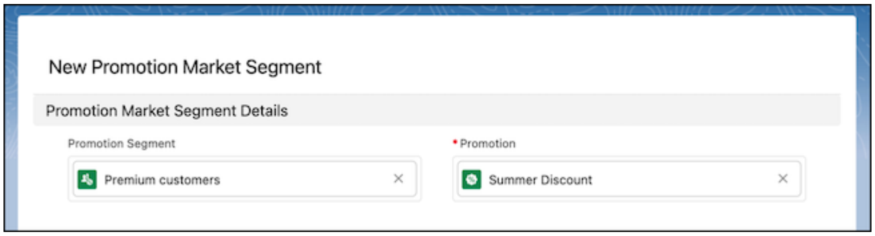
6. Enter a name for the segment, and click **Save**.
7. Click **Save** again.
8. Go to your segment, and select the **Related** tab.
9. Next to the stores or buyer groups option, click **Assign**.
10. Select at least one store or buyer group. If you're selecting a buyer group, make sure that it's assigned to the store. You can associate a promotion segment with either a store or buyer groups, but not both.

    For existing Commerce stores that have buyer groups and store segments, you must delete either the store or the buyer groups to create the promotion. No changes are required for new Commerce stores.

11. Click **Save**.

Example: To kick off the summer shopping season this May, you want to offer a 30% discount to the Premium customers buyer group in your D2C store. When you create a promotion segment:

- From the Promotion Segment dropdown menu, select **Premium customers**. This segment includes your D2C store and your Premium customers buyer group.
- From the Promotion dropdown menu, select **Summer Discount**.



New Promotion Market Segment

Promotion Market Segment Details

Promotion Segment: Premium customers

*Promotion: Summer Discount

SEE ALSO:

Commerce Promotions

Add a Promotion Tier

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Use promotion tiers to create progressive discounts for a promotion. Apply the highest qualifying tier to a cart. You can add tiers only to a promotion that was created as a tiered promotion. All discounts within a tier must be of the same type. You can create up to 10 tiers per promotion.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Important: Tiers can only be used for promotions that were created as tiered promotions.

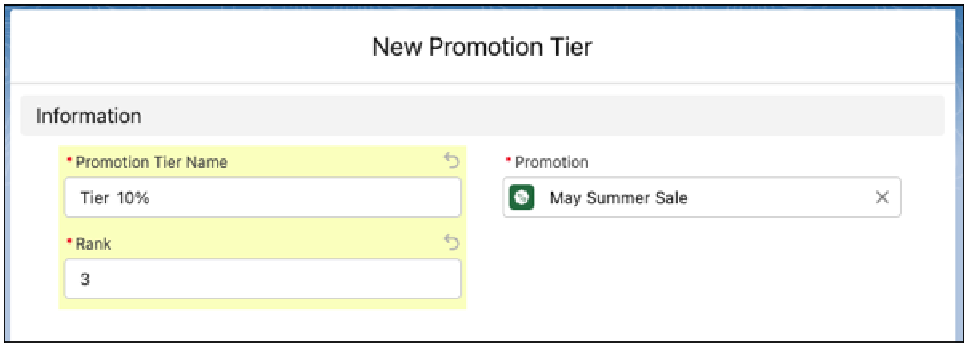
1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the tiered promotion.
4. On the Tiers tab, click **New**.
5. Enter a promotion tier name.
6. Select the promotion you want the tier to be assigned to.
7. Enter a rank.

   The rank determines which tier applies first. The lower the number, the better the discount.

8. Click **Save**.
9. Navigate to the promotion tier and select the **Related** tab.
10. To add discount details for the tier, click **New** next to Discounts. See Define Promotion Discounts on page 288.
11. To add qualifier details for the tier, click **New** next to Promotion Qualifiers. See Choose What Qualifies for a Promotion on page 290.
12. Repeat these steps to create each tier.

Example: To entice shoppers to purchase more, you want to give a better discount as the shopper adds more to their cart. You create three promotion tiers that give the shopper 10% off a $50 purchase, 20% off a $100 purchase, or 30% off a $200 purchase. When you create your promotion, select **Tiered Promotion** and then:

- Create a tier for each discount level and associate it with the tiered promotion.
- Assign the best discount to the lowest rank.
- Add your discounts and promotion qualifiers to each tier.



New Promotion Tier

Information

* Promotion Tier Name: Tier 10%

* Rank: 3

* Promotion: May Summer Sale

SEE ALSO:

Commerce Promotions

Create a Coupon

Share coupon codes that customers can manually redeem in your store. The coupon has the same segment, discount, and qualifier rules as the promotion that it's associated with.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Only manual promotions use coupons. To set a promotion to manual, deselect **Automatic**.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. On the Coupons tab, click **New**.
5. Enter a coupon code. This code is what customers use to redeem the promotion.

   Customers can add up to 5 coupons per cart.
6. Enter an optional description that customers don't see.
7. Use the Status dropdown to set the coupon as active or inactive.
8. (Optional) Enter a redemption limit per buyer and the maximum number of uses across all buyers up to 1000 for both fields.

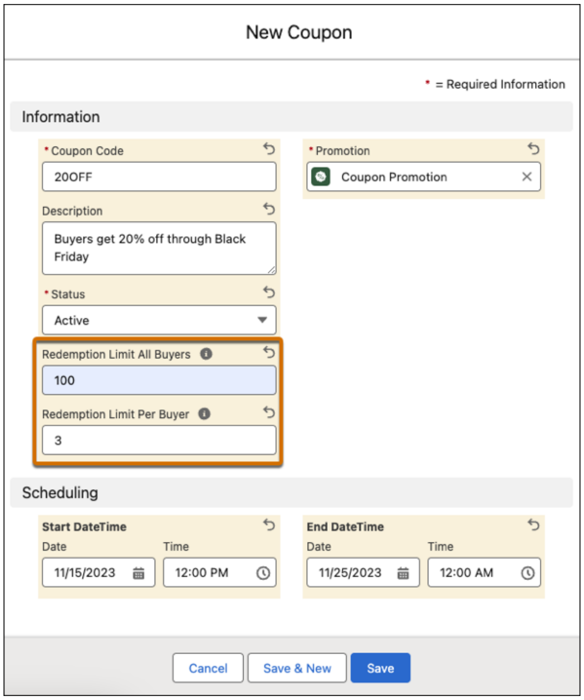
   When the coupon meets your specified limit, it's no longer valid. When you specify an all-buyer coupon limit, the limit per buyer can't exceed it.

   After you create the coupon, you can't decrease the redemption limit. If you create the coupon without a limit, then any change to the redemption limit is considered a decrease. To change the limit, delete and recreate the coupon.
9. (Optional) Enter the start and end date and time for the coupon.
10. Save your changes.

Example: With your Black Friday promotion, you want to create a coupon code called 20OFF that a limited number of customers can redeem manually days prior and through the biggest shopping day of the year.

- Enter `20OFF` for the Coupon Code and `Black Friday` as the associated promotion.
- Set the status to **Active**.

- Enter `100` as the redemption limit for all buyers and `3` as the redemption limit per buyer.
- Enter `11/15/2023 at 12:00 AM` as the start date and time and `11/25/23 at 12:00 AM` as the end date and time.



New Coupon

* = Required Information

Information

*Coupon Code: 20OFF

*Promotion: Coupon Promotion

Description: Buyers get 20% off through Black Friday

*Status: Active

Redemption Limit All Buyers: 100

Redemption Limit Per Buyer: 3

Scheduling

Start DateTime: Date 11/15/2023, Time 12:00 PM

End DateTime: Date 11/25/2023, Time 12:00 AM

SEE ALSO:

Commerce Promotions

Define a Promotion Discount

Set a target for your promotion discount, choose an adjustment type, and specify how much to deduct.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. On the Discounts tab, click **New**.
5. Select a promotion tier.

   See Add a Promotion Tier on page 286.

6. For Product, Product Category, and Shipping Rate target types, select a target that matches the target type that you plan to select.

   A promotion can have multiple product discounts as long as they have the same target type.

7. Select a target operator.
    - None—Neither of the other possible values apply. If the target type is Transaction or Shipping, select **None**.
    - Equal to—The qualifying product or item in the qualifying category must be in the cart.
    - Not Equal to—The qualifying product or item in the qualifying category isn't required to be in the cart.

8. Select a target type.
    - To discount individual products, select **Products**. You can discount up to 25 products.
    - To discount a subsection of products in a catalog, select **Product Category**. You can discount up to 25 product categories. If you want the category target to apply to variant products, manually add each variation parent to the category from the Category page.
    - To discount the entire order, select **Transaction** and leave the Target field empty.
    - To discount all shipping methods on the order, select **Shipping** and leave the Target field empty. A shipping promotion is applied to all the shipping methods that the shopper is eligible for. To use shipping promotions, your store must have the Cart Calculate API enabled. See Enable and Disable the Cart Calculate API for a Webstore.
    - To discount individual shipping methods on the order, select **Shipping Rate**. You can discount up to 25 shipping rates. To use shipping rate promotions, your store must have the Cart Calculate API enabled. See Enable and Disable the Cart Calculate API for a Webstore.

9. Select an adjustment type.
    - Fixed Amount Off Line Item Total—Deducts a monetary amount off a line item total for a product, product category, shipping, or shipping rate.
    - Fixed Amount Off Transaction—Deducts a monetary amount off the entire order for a transaction. This option is available only when you use the Transaction target type.
    - Fixed Amount Off Unit Price—Deducts a monetary amount off a single item for a product or product category.
    - Fixed Price—Specifies a promotional price for a product, product category, shipping, or shipping rate.
    - Percentage Discount—Deducts a specified percent from the price of a product, product category, transaction, shipping, or shipping rate.
    - Total Fixed Price—Specifies a promotional price for a set of products or product categories.

10. Select a currency ISO code.

    This field is available only in multicurrency stores.

11. Enter the adjustment percent or monetary amount, depending on the type of adjustment that you selected.

    If you enter a monetary amount and your account is multicurrency, choose a currency.

12. (Optional) Enter a quantity limit to restrict the number of products that can receive the discount.

    The default is unlimited. You can't set a quantity limit for shipping or shipping rates.

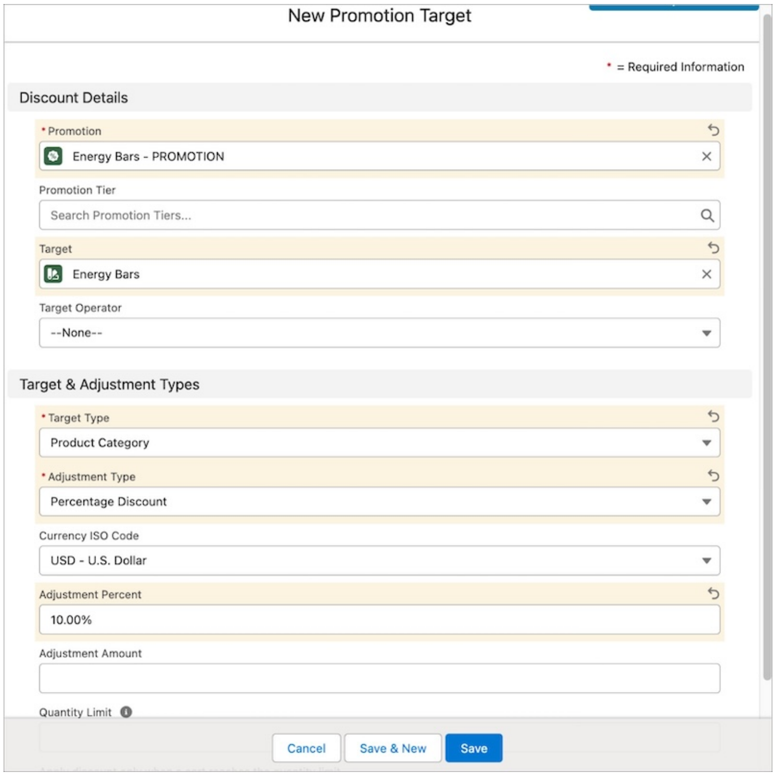
13. (Optional) To require the customer to meet the limit to be eligible for the promotion, select **Apply discount only when a cart reaches the quantity limit**.

14. Save your changes.

Example: To encourage your U.S. customers to stock up on healthy snacks, you want to provide a 10% discount on all energy bars in your store. When you create a promotion target:

- For Target, select **Energy Bars**.
- For Target Type, select **Product Category**.

- For Adjustment Type, select **Percentage Discount**.
- For Currency ISO Code, select **USD - U.S. Dollar**.
- For Adjustment Percent, enter **10**.



New Promotion Target

* = Required Information

Discount Details

*Promotion: Energy Bars - PROMOTION

Promotion Tier: Search Promotion Tiers...

Target: Energy Bars

Target Operator: --None--

Target & Adjustment Types

*Target Type: Product Category

*Adjustment Type: Percentage Discount

Currency ISO Code: USD - U.S. Dollar

Adjustment Percent: 10.00%

Adjustment Amount:

Quantity Limit

SEE ALSO:

Commerce Promotions

Choose What Qualifies for a Promotion

Set quantity or price minimums to add purchase requirements to your promotion.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

You can have up to 200 product qualifiers, 25 product category qualifiers, and 1 transaction total qualifier per promotion.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. On the Qualifiers tab, click **New**.
5. To find a specific product or product category, search the Qualifier field.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

   - To base your qualifier on a specific product, from the Qualifier dropdown, select **Products**.
   - To base your qualifier on a subsection of products in a catalog, from the Qualifier dropdown, select **Categories**. If you want the category qualifier to apply to variant products, manually add each variation parent to the category from the Category page.
   - To base the qualifier on only the transaction total, leave the Qualifier field empty.

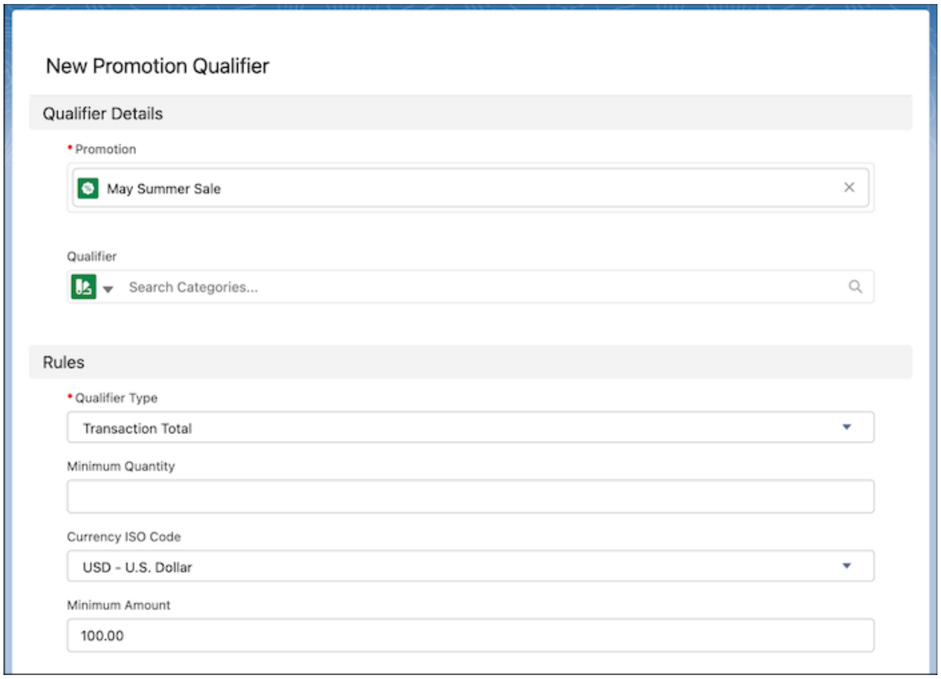
6. Choose a qualifier type that matches the qualifier that you selected. If the Qualifier field is empty, select **Transaction Total**.
7. Limit your promotion with either a quantity or price minimum.

   Quantity minimums support decimal amounts up to four places.

8. Save your work.

Example: To encourage larger purchases, you want to discount all orders over $100, no matter what's in the order. When you create a promotion qualifier:

- Leave the Qualifier field empty.
- Under Qualifier Type, select **Transaction Total**.
- For Currency ISO Code, select **USD - U.S. Dollar**.
- Under Minimum Amount, enter `100`.



New Promotion Qualifier

Qualifier Details

* Promotion: May Summer Sale

Qualifier: Search Categories...

Rules

* Qualifier Type: Transaction Total

Minimum Quantity:

Currency ISO Code: USD - U.S. Dollar

Minimum Amount: 100.00

SEE ALSO:

Commerce Promotions

Set Conditional Rules for a Promotion

Define conditional rules on an existing promotion to create complex discounts on your products. You can include or exclude specific products, categories, and product prices.

EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To add promotional rules, you must first add a discount or qualifier to the promotion.

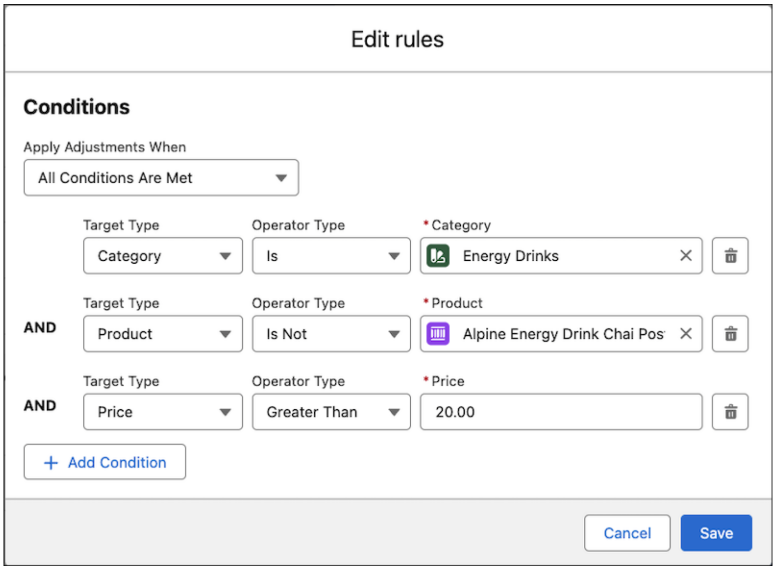
1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. Select either the Discount or Qualifier tab, depending on which one you provisioned for the promotion.

   The Discount tab shows any discounts that apply to this promotion. See Define a Promotion Discount. The Qualifier tab shows any quantity or price minimums that apply to this promotion. See Choose What Qualifies for a Promotion.

5. Select a Discount or Qualifier from the list.
6. In the Promotion Rules panel, click **Edit**.
7. For Apply Adjustment When, select whether all conditions must be met or any condition.
8. Click **Add Condition**.
9. Select the target type, operator, and the product, category, or price that the condition applies to.
10. To add more conditions, click **Add Condition**. To remove a condition, click the trash icon.
11. Click **Save**.

Example: To entice your customers to buy energy drinks, you want to promote a sale on products in that category over $20, but exclude a new energy drink. You have a general sale in progress, but you want to add conditional rules to an existing qualifier to promote these items. After you create a promotion with a qualifier:

- In Promotion Rules, select **All Conditions Are Met**.
- Click **Add Condition** and add these conditions: Target Type **Category**, Operator Type **Is**, and Category **Energy Drinks**.
- Add these conditions: Target Type **Product**, Operator Type **Is Not**, and Product **Alpine Energy Drink Chai**.
- Click **Add Condition** and add these conditions: Target Type **Price**, Operator Type **Greater Than**, and Price **20.00**.



Edit rules

Conditions

Apply Adjustments When: All Conditions Are Met

Target Type: Category; Operator Type: Is; * Category: Energy Drinks

AND Target Type: Product; Operator Type: Is Not; * Product: Alpine Energy Drink Chai Pos

AND Target Type: Price; Operator Type: Greater Than; * Price: 20.00

Localize Promotion Data

You can manually enter translated text for promotion names, display names, and terms and conditions if you have Data Translation enabled.

1. Go to the promotion that you want to add translations to.
2. Click the **Translations** tab.

   The Translations tab is available when you have Data Translation enabled for your org.
3. Click **Add Translation**.
4. Select the language, and enter the translated promotion name, display name, and terms and conditions.
5. Click **Save**.
6. To load the translation, refresh the store page.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

SEE ALSO:

Enable Data Translation

Customize Promotions in Experience Builder

Edit your store pages and components to customize how eligible customers see promotions.

Here are some ways that you can customize promotions in Experience Builder.

- Highlight product- and order-level savings by modifying the Cart and Promotions components on the Cart page.
- Add a Coupons component to let customers apply manual promotions to their cart.
- Show a promotion subtotal in the Cart Summary component.
- (D2C Commerce only) Change the promotional pricing text color and choose when to combine all promotions into a total percentage on a Product Card component in a Search, Category, or Product page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Checkout Promotion Processing

Promotions in Checkout for B2B (Aura) Stores

If you have a B2B store created using the Aura template, make sure that your checkout flow is set up to handle promotions. If your B2B store uses the LWR template, promotion functionality is already built into checkout in Experience Builder

When you create a B2B store that uses the Aura template, you can base your checkout flow on an example that includes promotions. If you created your B2B store before Winter '22, you can follow a multiple-step process to add promotion handling to your existing checkout flow.

After you configure your checkout flow with promotions, select it in the Checkout Flow component in Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Coupon Redemption in Checkout for Aura Stores

If you have a store created from an Aura template, make sure your checkout flow is set up to handle coupon redemption limits and promotions. If your store uses the LWR template, coupon redemption functionality and promotions are built into checkout in Experience Builder.

When you create a store that uses the Aura template, add coupon redemption limit apex APIs to your checkout flow.

Example Promotions

When you configure a promotion, you customize it based on what you would like customers to receive and how they qualify. The examples show you how to combine basic discount and qualifier options to create different outcomes. Use them as a starting point, try your own unique combinations, and incorporate more advanced settings to create the promotions that you need.

Order-Level Promotion Examples

To create different types of promotions for a customer's total order, use these discount and qualifier settings. You don't need to specify a discount target for an order-level promotion.

Product Promotion Examples

To create different types of promotions for specific products, use these discount and qualifier settings.

Product Category Promotion Examples

To create different types of promotions for products in a product category, use these discount and qualifier settings.

Advanced Promotion Examples

When you've familiarized yourself with the basics of creating a promotion, here are a few ways to customize them.

Order-Level Promotion Examples

To create different types of promotions for a customer's total order, use these discount and qualifier settings. You don't need to specify a discount target for an order-level promotion.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off entire transaction	—	Percentage Discount	—	—	Receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	—	—	Receive $10 off the order.
X worth of any product	Percent off entire transaction	—	Percentage Discount	—	Minimum Amount X	Spend $50 to receive 10% off the order
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	—	Minimum Amount X	Spend $50 to receive $10 off the order.
X units of Product A	Percent off entire transaction	—	Percentage Discount	Product A	Minimum Quantity X	Buy 5 bags of Alpine Medium Roast coffee beans to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Product A	Minimum Quantity X	Buy 5 bags of Alpine Medium Roast coffee beans to receive $10 off the order.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
X worth of Product A	Percent off entire transaction	—	Percentage Discount	Product A	Minimum Amount X	Buy $50 of Alpine Medium Roast coffee beans to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Product A	Minimum Amount X	Buy $50 of Alpine Medium Roast coffee beans to receive $10 off the order.
X products from Category A	Percent off entire transaction	—	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive $10 off the order.
X worth of products from Category A	Percent off entire transaction	—	Percentage Discount	Category A	Minimum Amount X	Buy $50 of products from the Imports category to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Category A	Minimum Amount X	Buy $50 of products from the Imports category to receive $10 off the order.

SEE ALSO:

Commerce Promotions

Product Promotion Examples

To create different types of promotions for specific products, use these discount and qualifier settings.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off Product A	Product A	Percentage Discount	—	—	Receive 10% off Alpine Medium Roast coffee beans.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	—	—	Receive $10 off your total purchase of Alpine Medium Roast coffee beans.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	—	—	Receive $10 off each unit of Alpine Medium Roast coffee beans.
	Fixed price for Product A	Product A	Fixed Price	—	—	Receive a unit of Alpine Medium Roast Coffee Beans for $10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	—	—	Receive 3 units of Alpine Medium Roast Coffee Beans for $20.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
X worth of any product	Percent off Product A	Product A	Percentage Discount	—	Minimum Amount X	Spend $50 to receive 10% off Alpine Medium Roast coffee beans.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	—	Minimum Amount X	Spend $50 to receive $10 off Alpine Medium Roast coffee beans.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	—	Minimum Amount X	Spend $50 to receive $10 off each unit of Alpine Medium Roast coffee beans.
	Fixed price for Product A	Product A	Fixed Price	—	Minimum Amount X	Spend $50 to receive a unit of Alpine Medium Roast Coffee Beans for $10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	—	Minimum Amount X	Spend $50 to receive 3 units of Alpine Medium Roast Coffee Beans for $20.
X units of Product A	Percent off Product A	Product A	Percentage Discount	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 10% off that product.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive $10 off a line item of that product.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						beans to receive $10 off each unit of that product.
	Fixed price for Product A	Product A	Fixed Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive a unit of Alpine Medium Roast Coffee Beans for $10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 3 units of Alpine Medium Roast Coffee Beans for $20.
X worth of Product A	Percent off Product A	Product A	Percentage Discount	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive 10% off products from the coffee machine category.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive 10% off that product.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive $10 off a line item of that product.
	Fixed price for Product A	Product A	Fixed Price	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						beans to receive a unit of that product for $10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive 3 units of that product for $20.
X products from Category A	Percent off Product B	Product B	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off an Alpine Professionals coffee machine.
	Fixed amount off a line item of Product B	Product B	Fixed Amount off Line Item Total	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive $10 off your purchase of Alpine Professionals coffee machines.
	Fixed amount off each unit of Product B	Product B	Fixed Amount off Unit Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive $10 off each Alpine Professionals coffee machine.
	Fixed price for Product B	Product B	Fixed Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive an Alpine Professionals coffee machine for $30.
	Fixed price for a set of Product B	Product B	Total Fixed Price (Quantity limit required)	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive two

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						Alpine Professionals coffee machines for $50.
X worth of products from Category A	Percent off Product B	Product B	Percentage Discount	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive 10% off an Alpine Professionals coffee machine.
	Fixed amount off a line item of Product B	Product B	Fixed Amount off Line Item Total	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive $10 off your total purchase of Alpine Professionals coffee machines.
	Fixed amount off each unit of Product B	Product B	Fixed Amount off Unit	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive $10 off each Alpine Professionals coffee machine.
	Fixed price for Product B	Product B	Fixed Price	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive an Alpine Professionals coffee machine for $30.
	Fixed price for a set of Product B	Product B	Total Fixed Price (Quantity limit required)	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive two

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						Alpine Professionals coffee machines for $50.

SEE ALSO:

Commerce Promotions

Product Category Promotion Examples

To create different types of promotions for products in a product category, use these discount and qualifier settings.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off products from Category A	Category A	Percentage Discount	—	—	Receive 10% off any product from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	—	—	Receive a $10 discount on a line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	—	—	Receive a $10 discount on a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	—	—	Receive a product from the Imports

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						category for $25.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	—	—	Receive two products from the Imports category for $50.
X worth of any product	Percent off products from Category A	Category A	Percentage Discount	—	Minimum Amount X	Spend $50 to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	—	Minimum Amount X	Spend $50 to receive $10 off a line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	—	Minimum Amount X	Spend $50 to receive $5 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	—	Minimum Amount X	Spend $50 to receive a product from the Imports category for $10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	—	Minimum Amount X	Spend $50 to receive 3 products from the Imports category for $20.
X units of Product A	Percent off products from Category B	Category B	Percentage Discount	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 10% off products from the Coffee Machine category.
	Fixed amount off a line item of	Category B	Fixed Amount off Line Item Total	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	products from Category B					Roast coffee beans to receive $20 off a line item of products from the Coffee Machine category.
	Fixed amount off a product unit from Category B	Category B	Fixed Amount off Unit Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive $10 off a product unit from the Coffee Machine category.
	Fixed price for any product from Category B	Category B	Fixed Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive a product from the Coffee Machine category for $50.
	Fixed price for a set of products from Category B	Category B	Total Fixed Price (Quantity limit required)	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 2 products from the coffee machine category for $100.
X worth of Product A	Percent off products from Category B	Category B	Percentage Discount	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive 10% off products from the coffee machine category.
	Fixed amount off a line item of	Category B	Fixed Amount off Line Item Total	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	products from Category B					Roast coffee beans to receive $20 off a line item of products from the coffee machine category.
	Fixed amount off a product unit from Category B	Category B	Fixed Amount off Unit Price	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive $10 off a product unit from the coffee machine category.
	Fixed price for any product from Category B	Category B	Fixed Price	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive a product from the coffee machine category for $50.
	Fixed price for a set of products from Category B	Category B	Total Fixed Price (Quantity limit required)	Product A	Minimum Amount X	Buy $50 worth of Alpine Medium Roast coffee beans to receive 2 products from the coffee machine category for $100.
X products from Category A	Percent off products from Category A	Category A	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive $10 off a

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive $10 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive a product from the Imports category for $10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive two products from the Imports category for $20.
X worth of products from Category A	Percent off products from Category A	Category A	Percentage Discount	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive $10 off a line item of products from the Imports category.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive $10 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive a product from the Imports category for $10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	Category A	Minimum Amount X	Buy $50 worth of products from the Imports category to receive two products from the Imports category for $20.

SEE ALSO:

Commerce Promotions

Advanced Promotion Examples

When you've familiarized yourself with the basics of creating a promotion, here are a few ways to customize them.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Add More Discount Targets

A promotion can target a single category or include multiple product discounts. For example, "Spend $50, get $10 off product X or $10 off product Y" or "Spend $50, get $10 off category Z."

To target multiple categories for a discount, set up multiple promotions, one for each category. For example, in this promotion, "Spend $150, get $10 off category Z and D", set up separate promotions in the Z and D categories.

Add More Qualifiers

Multiple qualifiers can make a promotion more flexible or more restrictive, depending on your qualifier criteria. If a customer must meet only one qualifier, select **Any**. To require that a customer meets every qualifier to receive the promotion, select **All**.

Apply Quantity or Cart Limits

To restrict the number of times a product can receive a promotion, in the discount settings, enter the quantity limit. To restrict the number of times a promotion can apply to a cart, in the promotion details, enter a maximum application per cart. To create more sophisticated promotions, combine these limits. To require that a customer meets the quantity limit before receiving the discount, select **Apply discount only when a cart reaches the quantity limit**.

Create a Basic BOGO Promotion Deal

To offer a buy-one-get-one (BOGO) deal, use the same product or product category as your discount and qualifier. Because the customer must buy a product at full price to receive the discount on an additional product, in the promotion details, select **Exclude qualifying items from discounts**.

Example: You want to require that a customer buys an item from the Baseball Cap category or an item from the T-shirt category to receive one free pair of athletic socks. The offer can be redeemed only one time per order. To configure this scenario:

- Add a qualifier for both categories.
- In the discount details, enter a quantity limit of `1`.
- In the promotion details, set the qualifier criteria to **Any**.
- In the promotion details, enter a Maximum Applications Per Cart value of `1`.

Example: You want to create a modified BOGO deal that offers customers 50% off two bags of Alpine Medium Roast Coffee for every five bags of that same coffee that they purchase. The customer must buy two additional bags, for a total of seven bags, to receive the discount. To configure this scenario:

- Add a qualifier for Alpine Medium Roast Coffee, and enter a minimum quantity of `5`.
- Add a discount for Alpine Medium Roast Coffee.
- In the discount details, enter a quantity limit of `2`, and select **Apply discount only when a cart reaches the quantity limit**.
- In the promotion details, select **Exclude qualifying items from discount**.

Create Advanced BOGO Promotion Deals

Sometimes merchants or manufacturers require that a discounted item can't cost more than the least-expensive qualifying item.

Example: You want to create a modified BOGO deal that offers customers 50% off a pair of pants when they purchase a shirt. However, the pants must cost less than the shirt.

- Create your promotion, and set the discount restriction to **Limit by Least Expensive Qualifying Product**.
- Add a promotion qualifier.
  - Qualifier: Category > Shirt
  - Qualifier Type: Product category
  - Minimum Quantity: `1`
- Add a discount target.
  - Target: Category > Pants

    - Target Type: Product category
    - Adjustment Type: Percentage Discount
    - Adjustment Percent: `50`
    - Quantity Limit: `1`

By default, the most expensive items are discounted first, followed by the less expensive items. You can reverse this strategy and discount the least-expensive items first.

Example: You want to create a modified BOGO deal that offers customers a free pair of pants when they buy a shirt. If they have two pairs of pants in the cart, the least-expensive pants are free.

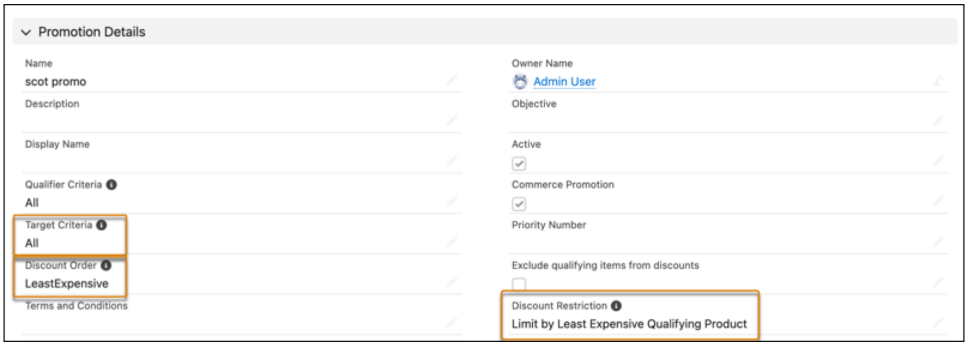
- Create your promotion, and set the discount order to **Least Expensive**.
- Add a promotion qualifier.
    - Qualifier: Category > Shirt
    - Qualifier Type: Product category
    - Minimum Quantity: `1`
- Add a discount target.
    - Target: Category > Pants
    - Target Type: Product category
    - Adjustment Type: Percentage Discount
    - Adjustment Percent: `100`
    - Quantity Limit: `1`

You can create a multiple-discount promotion that requires all discount types to be met before the promotion is applied.

Example: You want to create a modified BOGO deal that gives the customer two discounts. If they buy a shirt, they can get a pair of pants at 50% off and $10 off a pair of shoes. All three items must be in the cart before the promotion applies.

- Create your promotion, and set the target criteria to **All**.
- Add a promotion qualifier.
    - Qualifier: Category > Shirt
    - Qualifier Type: Product category
    - Minimum Quantity: `1`
- Add a discount target.
    - Target: Product > Pants
    - Target Type: Product
    - Adjustment Type: Percentage Discount
    - Adjustment Percent: `50`
    - Quantity Limit: `1`
- Add another discount target.
    - Target: Product > Shoes
    - Target Type: Product
    - Adjustment Type: Fixed Amount Off Unit Price

- Adjustment Percent: `10`
- Quantity Limit: `1`



Promotion Details

Name: scot promo

Owner Name: Admin User

Description:

Objective:

Display Name:

Active: ☑

Qualifier Criteria: All

Commerce Promotion: ☑

Target Criteria: All

Priority Number:

Discount Order: LeastExpensive

Exclude qualifying items from discounts: ☐

Terms and Conditions:

Discount Restriction: Limit by Least Expensive Qualifying Product

SEE ALSO:

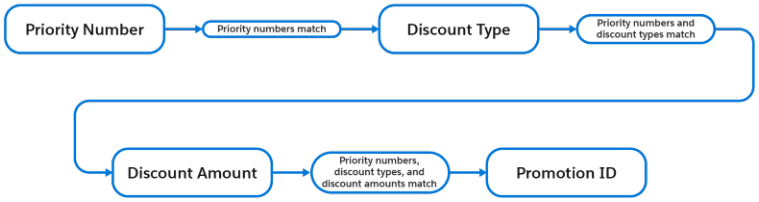
Commerce Promotions

Prioritizing Promotions

When a cart is eligible for multiple promotions, your exclusivity and priority rules determine which promotions apply.

Promotion priority is first determined by exclusivity, which specifies whether a promotion can be combined with other promotions. Next, the promotion's priority is based on its priority number, discount type, discount amount, and promotion ID.

If priority numbers match, the store considers each promotion's discount details.


Priority Number
Priority numbers match
Discount Type
Priority numbers and discount types match
Discount Amount
Priority numbers, discount types, and discount amounts match
Promotion ID

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Exclusivity

You specify the exclusivity type when you create your promotion. A non-exclusive promotion can be combined with other promotions. The default exclusivity type is class. A promotion with class exclusivity can't be combined with promotions of the same class. For example, you want one product promotion per product or one transaction promotion per order. A promotion with global exclusivity is the only promotion that can be applied to an entire order.

Exclusivity type is prioritized in this order.

1. Global exclusive product
2. Global exclusive order
3. Class exclusive product
4. Non-exclusive product
5. Class exclusive order

6. Non-exclusive order

Within each exclusivity type, promotions are prioritized in this order.

1. Priority number
2. Discount type
3. Discount amount
4. Alphabetically by ID

Priority Number

A priority number is the best way to control how your store applies a promotion. You set the priority number when you create your promotion. The lower the number, the higher the priority.

Product and product category promotions are evaluated and applied first. Cart and order promotions are evaluated and applied after all product and product category promotions, even if they have a higher priority.

Discount Type

When promotions have the same priority number, your store considers the discount type. Certain types of discounts are prioritized over others. Discounts are prioritized in this order.

1. Fixed price
2. Total fixed price
3. Fixed amount off
4. Percentage off

If a promotion has multiple discount targets, the highest priority discount type is used.

Discount Amount

When promotions have the same priority number and discount type, your store prioritizes the discount that results in the highest savings for your customer. Discounts amounts are prioritized in this order.

1. Fixed price—Prioritizes the promotion with the lowest fixed price.
2. Total fixed price—Prioritizes the promotion with the lowest fixed price.
3. Fixed amount off—Prioritizes the promotion with the highest amount off.
4. Percentage off—Prioritizes the promotion with the highest percentage off.

If a promotion has multiple discount targets, the amount of the highest priority discount type is used.

Promotion ID

When promotions have the same priority number, discount type, and discount amount, your store prioritizes the promotion by its numerical ID. The lower the numerical ID, the higher the priority.

Example: A customer spends $125 on a pair of shoes and is eligible for two priority 1, product-level promotions.

- Promotion A deducts 10% off the price of the pair of shoes.
- Promotion B offers the shoes for a fixed price of $100.

The promotions have the same priority level, so the store considers the discount type. The customer receives Promotion B because a fixed price discount is prioritized over a percentage discount.

Remove a Promotion

You can remove a promotion from your store temporarily or permanently.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Promotions**.
3. Select the promotion.
4. To remove the promotion temporarily:
   a. Click **Edit**.
   b. To deactivate the promotion, deselect **Active**.
   c. To end the promotion sooner, change the end date and time.
   d. Save your work.
5. To remove the promotion permanently:
   a. Click **Delete**.
   b. In the confirmation window, click **Delete** to confirm.

   Note: If a promotion is connected to an order, you can't delete it. To stop the promotion from being applied to new transactions, update its end time or deactivate it.

SEE ALSO:

Commerce Promotions

Sell Globally

Enable languages, translations, and currencies to expand the reach of your store to countries around the world.

Configure Salesforce for Global Stores

Make sure that your language, translation, and currency settings support stores around the world.

Configure Store Language, Currency, and Tax

Make sure that the language, currency, and tax settings are configured correctly to sell around the world.

Segment a Store into Markets Based on Locale

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit the store, they can choose their locale. Based on their selection, the store displays prices, promotions, and entitlements specific to their market. You can have a total of up to 25 active locales for a store across all markets. For example, your store could have one market with 25 locales or 25 markets with one locale each. A locale can be used only one time across all markets assigned to a store.

Manage Translations

You can translate the product, category, and promotion text. If you're using product variations, you can also translate the variation attribute names. In Experience Builder, you can localize the store component labels.

Configure Salesforce for Global Stores

Make sure that your language, translation, and currency settings support stores around the world.

Add Language Support to the Store Page Layout

To manage products in more than one language, add a supported language field to the store page layout.

Enable Data Translation

When you enable data translation, you can translate the data stored in the product and category fields. You can also enable data translation for custom text and URL fields on the product and category objects.

Enable Translation Workbench

To assist with localizing store information, enable Translation Workbench and add the languages that you want to use in your stores.

Support Multiple Currencies in a Commerce Store

To support international customers, provide multiple currencies in your B2B or D2C store. By default, a store supports only the currency listed as the currency locale on your Company Information page, unless you turn on multiple currencies. The currency settings apply to all stores in your org.

Add Language Support to the Store Page Layout

To manage products in more than one language, add a supported language field to the store page layout.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Object Manager`, and then select **Object Manager**.
3. In the Quick Find box, enter `Store`, and select **Store** > **Page Layouts** > **Store Layout**.
4. From the Fields menu, drag the **Supported Language** and **Default Language** fields on to the Store page layout.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

5. Save your changes.

SEE ALSO:

Page Layouts

Configure Salesforce for Global Stores

Enable Data Translation

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

When you enable data translation, you can translate the data stored in the product and category fields. You can also enable data translation for custom text and URL fields on the product and category objects.

Note: Data translation requires API version 48.0 or later. Data translation counts against your org's storage limits.

1. Enable data translation for the name and description fields on the product and category objects.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Company Information`, and select **Company Information**.
    c. In the Organization Detail section, click **Edit**.
    d. Select **Enable Data Translation**.
    e. Save your changes.
2. Enable data translation for custom fields.
    a. Click ⚙ at the top of the page, and then select **Setup**.
    b. In the Quick Find box, enter `Data Translation Settings`, and select **Data Translation Settings**.
    c. Select the object. Only the objects that support data translation are listed.
    d. Select the custom fields that you want to make available for data translation.
    You can enable data translation only for custom fields with a type of Text, Text Area, Text Area (Long), Text Area (Rich), or URL.
    e. Save your changes.

SEE ALSO:

Manage Objects' Data Translations

Configure Salesforce for Global Stores

Localize Product, Category, and Promotion Data

Enable Translation Workbench

To assist with localizing store information, enable Translation Workbench and add the languages that you want to use in your stores.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Translation Workbench`, and then select **Translation Language Settings**.
3. Click **Enable**.
4. Click **Add**.
5. From the Language dropdown, select the language and select **Active**.
6. Save your changes.

   Add as many languages as you need for your stores.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Configure Salesforce for Global Stores

Translation Workbench

Support Multiple Currencies in a Commerce Store

To support international customers, provide multiple currencies in your B2B or D2C store. By default, a store supports only the currency listed as the currency locale on your Company Information page, unless you turn on multiple currencies. The currency settings apply to all stores in your org.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter and then select **Company Information**.
3. Click **Edit**.
4. Under Currency Settings, select **Activate Multiple Currencies**.
5. Save your changes.
6. From Setup, in the Quick Find box, enter and then select **Manage Currencies**.
7. For the best price book experience, disable **Parenthetical Currency Conversion**.
8. In the Active Currencies section, click **New**.
9. Set the currency type and conversion rate.

   B2B and D2C stores use a currency conversion service rather than the conversion rate field. However, you must enter something in this field.

10. Set the number of decimal places.

    B2B and D2C stores support three or more decimal places in the price of a product, but round to two decimal places in the line item, cart, and order totals. For example, you price a product at $15.759. If a customer adds five items to the cart, the total is $78.795, but the amount that is shown in the cart and order details is $78.80.

11. Save your changes.

SEE ALSO:

Configure Salesforce for Global Stores

Manage Multiple Currencies

Configure Language, Ship-To Countries, and Currencies for a B2B Store

Configure Language, Ship-To Countries, and Currencies for a D2C Store

Configure Store Language, Currency, and Tax

Make sure that the language, currency, and tax settings are configured correctly to sell around the world.

Configure Language, Ship-To Countries, and Currencies for a D2C Store

Specify the language, ship-to countries, and currency settings for a D2C store.

Configure Language, Ship-To Countries, and Currencies for a B2B Store

Specify the language, country, ship-to countries, and currencies for a B2B store.

Configure Tax Settings for a Store

Configure tax settings for a B2B or D2C store.

Languages Supported for Search Results

For D2C stores, search results are returned in the language of the store. For B2B stores, search results are returned in the language assigned to the buyer's user account. If a buyer is configured to use a language that the store doesn't support, search results, including facet and filter values, are returned in the store's default language.

Configure Language, Ship-To Countries, and Currencies for a D2C Store

Specify the language, ship-to countries, and currency settings for a D2C store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

These steps assume that you've already created a D2C store using the D2C store template. See Create a Commerce Store or Reorder Portal .

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. Under Localization, click the pencil icon next to Supported Languages. Move the language for your store from Available to Chosen, and select the store's default language from the dropdown.

   The available languages are the languages enabled in Translation Workbench. See Enable Translation Workbench. D2C stores can support up to 25 languages.
4. Under Supported Ship To Countries, move the countries that you want to support to Chosen.

   If you don't see the Supported Ship To Countries list, check whether your Salesforce admin has added the field to the layout.
5. Under Default Ship To Country, click the dropdown and select a supported country.

   If you don't see the Default Ship To Country dropdown, check whether your Salesforce admin has added the field to the layout.

6. Under Pricing Supported Currencies, move the currencies your store supports from Available to Chosen, and select the store's default currency.

   The available currencies are the currencies enabled in your org. See Support Multiple Currencies in a Commerce Store.

7. Save your changes.
8. From the store's home page, click the **Experience Builder** tile.
9. Click the gear icon, and click **Languages**.
10. If the language that you want to use isn't listed as a Site Language, click **Edit Languages** to add it.
11. From the Default Site Language dropdown, select the default language for the store.

    The default language that you select in Experience Builder must be the same as the language that you selected on the Administration tile for the store.

12. Add the Country Selector component to the footer of your store.

SEE ALSO:

Configure Language, Ship-To Countries, and Currencies for a B2B Store

Configure Language, Ship-To Countries, and Currencies for a B2B Store

Specify the language, country, ship-to countries, and currencies for a B2B store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

These steps assume that you've already created a B2B store using the B2B store template. See Create a Commerce Store or Reorder Portal .

Important: To validate addresses in checkout, your store must support at least one ship-to country. If you don't select a ship-to country, address validation fails.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**.
3. Under Localization, click the pencil icon next to Supported Languages. Move the languages for your store from Available to Chosen, and select the store's default language from the dropdown.
   - The available languages are the languages enabled in Translation Workbench. B2B stores can support up to 25 languages.
   - Buyers see the store in the language configured in their user record. If a buyer is configured to use a language that's not supported in the store, they see the store in the store's default language. If a buyer changes their own language in the customizable user settings component to a language not supported in the store, they see the store in the store's default language. To create a store that allows buyers to select a language for the store, use the markets feature. See Segment a Store into Markets Based on Locale.
4. (Optional) Under Supported Ship To Countries, move the countries that you want to support to Chosen.

   If you don't see the Supported Ship To Countries list, check whether your Salesforce admin has added the field to the layout.

   Note: The Ship-to Country setting doesn't generate a country picklist that displays on your store. To display a country picklist requires writing customized code.

5. (Optional) Under Default Ship To Country, click the dropdown and select a supported country.

If you don't see the Default Ship To Country dropdown, check whether your Salesforce admin has added the field to the layout.

6. Under Pricing, click the pencil icon next to Supported Currencies. Move the currencies for your store from Available to Chosen, and select the store's default currency.

   The available currencies are the currencies enabled in your org. See Support Multiple Currencies in a Commerce Store. The currency displayed to the buyer is the currency configured for the buyer's account. If the currency for the buyer's account isn't supported in the store, the store's default currency is shown. If the price books or promotions that a buyer has access to don't use the currency configured in the buyer's account, products are shown without prices, and promotions aren't activated.

   Important: Buyers don't select a currency during shopping. A B2B buyer's currency is assigned when their buyer account is created.

7. Save your changes.
8. From the store's home page, click the **Experience Builder** tile.
9. Click the gear icon, and click **Languages**.
10. If the languages that you want to use aren't listed under Site Language, click **Add Languages** and add them.
11. From the Default Site Language dropdown, select the default language for the store.

    The default language that you select in Experience Builder must be the same as the default language that you selected on the Administration tile for the store.

SEE ALSO:

Configure Tax Settings for a Store

Configure Tax Settings for a Store

Configure tax settings for a B2B or D2C store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

These steps assume that you've already created a store using the store template. See Create a Commerce Store or Reorder Portal .

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Checkout**.
3. Click **Taxes**.
4. Under Tax Type, select Net or Gross.

   For net, the product price doesn't include the tax. For gross, the product price includes the tax.

   Important: Be careful about selecting the tax type. After you activate the store, you can't change the tax type. If you must change the tax type after you activate the store, contact Salesforce customer support.

If your store is using gross taxes, you can use the Salesforce tax solution. See Manual Salesforce Tax Solution for a Commerce Store. If your store is using net taxes, or you want to use a third-party tax solution, see Add a Tax Calculation Service for a Commerce Store.

Languages Supported for Search Results

For D2C stores, search results are returned in the language of the store. For B2B stores, search results are returned in the language assigned to the buyer’s user account. If a buyer is configured to use a language that the store doesn't support, search results, including facet and filter values, are returned in the store's default language.

Search results are supported in most languages and locales.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

Language	Locales
Arabic	ar_AE, ar_BH, ar_DZ, ar_EG, ar_IQ, ar_JO, ar_KW, ar_LB, ar_LY, ar_MA, ar_OM, ar_QA, ar_SA, ar_SD, ar_SY, ar_TN, ar_YE
Armenia	hy_AM
Bangla	bn_BD, bn_IN
Basque	eu_ES
Bulgarian	bg_BG
Catalan	ca_ES, ca_ES_EURO
Chinese	zh_CN, zh_CN_PINYIN, zh_CN_STROKE, zh_HK, zh_HK_STROKE, zh_MO, zh_SG, zh_TW, zh_TW_STROKE
Czech	cs_CZ
Danish	da_DK
Dutch	nl_AW, nl_BE, nl_NL, nl_SR
English	en_AG, en_AU, en_BS, en_BB, en_BZ, en_BM, en_BW, en_CM, en_CA, en_KY, en_ER, en_FK, en_FJ, en_GM, en_GH, en_GI, en_GY, en_HK, en_IN, en_ID, en_IE, en_IE_EURO, en_JM, en_KE, en_LR, en_MG, en_MW, en_MY, en_MU, en_NA, en_NZ, en_NG, en_PK, en_PG, en_PH, en_RW, en_WS, en_SC, en_SL, en_SG, en_SX, en_SB, en_ZA, en_SH, en_SZ, en_TZ, en_TO, en_TT, en_UG, en_GB, en_US, en_VU
Finnish	fi_FI, fi_FI_EURO
French	fr_BE, fr_CA, fr_CH, fr_FR_EURO, fr_FR, fr_GN, fr_HT, fr_KM, fr_LU, fr_MC, fr_MR, fr_WF
German	de_AT, de_AT_EURO, de_BE, de_DE, de_DE_EURO, de_LU, de_LU_EURO, de_CH
Greek	el_GR
Hindi	hi_IN
Hungarian	hu_HU
Indonesian	in_ID
Irish	ga_IE

Language	Locales
Italian	it_CH, it_IT
Japanese	ja_JP
Latvian	lv_LV
Lithuanian	lt_LT
Norwegian	no_NO
Persian	fa_IR
Portuguese	pt_AO, pt_BR, pt_CV, pt_MZ, pt_PT, pt_ST
Romanian	ro_MD, ro_RO
Russian	ru_KZ, ru_RU
Spanish	es_AR, es_BO, es_CL, es_CO, es_CR, es_CU, es_DO, es_EC, es_SV, es_GT, es_HN, es_MX, es_NI, es_PA, es_PY, es_PE, es_PR, es_ES, es_ES_EURO, es_US, es_UY, es_VE
Swedish	sv_SE
Thai	th_TH
Turkish	tr_TR

SEE ALSO:

- Enable Data Translation
- Localize Product, Category, and Promotion Data
- Store Search

Segment a Store into Markets Based on Locale

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit the store, they can choose their locale. Based on their selection, the store displays prices, promotions, and entitlements specific to their market. You can have a total of up to 25 active locales for a store across all markets. For example, your store could have one market with 25 locales or 25 markets with one locale each. A locale can be used only one time across all markets assigned to a store.

You can use markets for guests and authenticated shoppers on a D2C store and only for guest buyers on a B2B store. After buyers log in to a B2B store, they see the prices, promotions, and entitlements specific to their account.

Considerations for Market and Buyer Group Setup

As you set up your market and buyer groups, keep these considerations in mind.

Set Up the Buyer Group Page to Support Markets in Commerce Stores

Add the Locales related list to your Buyer Group object page. The Locales related list appears on all Buyer Group pages, even Buyer Groups that aren't of type Market, where locales aren't applicable. Configuring locales for non-Market Buyer Groups can cause errors.

Configure a Market for Your Commerce Store

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. To create a market, assign the price book, entitlement policy, currency, ship-to countries, and locales that it supports. After you create a market, you can also assign a promotion.

Considerations for Market and Buyer Group Setup

As you set up your market and buyer groups, keep these considerations in mind.

- Only the promotion segments that are assigned to the market apply to the products in the market. A store's defaults for language, ship-to country, price book, and currency settings aren't used after a segment is assigned to the market. These defaults don't apply if you're setting up a promotion segment in a buyer group.
- A product uses the lowest price found in all of the store's price books and markets. This behavior doesn't apply if you're setting up a new price book in a buyer group.
- Only the entitlement policies assigned to a market are used. Entitlement policies assigned to buyer groups aren't used.
- If you haven't assigned a ship-to country to a market or buyer group, the store's ship-to country is used.
- If you haven't assigned a locale to a market, entities assigned to the market are ignored, and the store defaults are used. This behavior doesn't apply when you assign locales to a buyer group.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Set Up the Buyer Group Page to Support Markets in Commerce Stores

Add the Locales related list to your Buyer Group object page. The Locales related list appears on all Buyer Group pages, even Buyer Groups that aren't of type Market, where locales aren't applicable. Configuring locales for non-Market Buyer Groups can cause errors.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Object Manager`, and then select **Object Manager**.
3. From the Object Manager, enter `Buyer Group` in the Quick Find box.
4. Select **Buyer Group** > **Page Layouts** > **Buyer Group Layout**.
5. In the Buyer Group Layout section, select **Related Lists**, and drag **Locales** to the Related List section.
6. Save your changes.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Configure a Market for Your Commerce Store

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. To create a market, assign the price book, entitlement policy, currency, ship-to countries, and locales that it supports. After you create a market, you can also assign a promotion.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before you create the market, create the price book and entitlement policy you want to use in the market so that they're ready to assign.

1. Create a market.
    a. In the navigation sidebar, select a store from the **Store** dropdown.
    b. Select **Settings** > **Store**, and then click **Markets**.
    c. Click **Create Market**.

       A market is a special type of Buyer Group record where the Role field on the Buyer Group is set to Market.
    d. Enter a market name and description, and click **Save**.
2. Click **Related**.
3. Next to Price Books, click **Assign**, and select the price book for the market.

   Make sure that the price book has entries in the currency that you want to use for your market.
4. Next to Commerce Entitlement Policies, click **Assign**, and select the entitlement policy for the market.
5. Next to Supported Ship-To Countries, click **Assign**, and move the ship-to countries for your market to the Chosen list.

   Ship-to countries apply to all locales in the market.
6. (Optional) Select a market currency.

   If you don't select a market currency, each locale in the market uses the currency assigned to that locale in the org. If you do select a market currency, it applies to all locales in the market and overrides the currency assigned to the locale in the org.
7. Click **Submit**.
8. Next to Locales, click **Assign**, select the locales for your market, and click **Assign**.

   You can have a total of up to 25 active locales for a store across all markets. For example, your store could have one market with 25 locales or 25 markets with one locale each. A locale can be used only one time across all markets assigned to a store.

   Important: As soon as you add locales to a market, the market is active in the store.
9. From the store's home page, click the **Experience Builder** tile.
10. From Settings, select **Languages**.
11. Click **Edit Languages**. If necessary, adjust the languages so that the Site Languages include every language that you assigned to all locales in the market, and click **Save**.
12. In the components palette, drag the Country Selector component to a page in your store.

    When a customer goes to your store, they can use the Country Selector to choose their locale. The locales available in the Country Selector are the locales that you added to the markets for the store.

13. At the top left of the Experience Builder, click **Publish**.
14. Rebuild the search index.
    - a. In the navigation sidebar, select a store from the **Store** dropdown.
    - b. Click **Search**.
    - c. Click **Search Index Summary**.
    - d. Select a full reindex, and click **Rebuild Index**.

      Select a full reindex even if the partial reindex option is available.

To add a promotion to the market, assign it to the Buyer Group record that represents the market. See Target Customers with a Promotion Segment.

Manage Translations

You can translate the product, category, and promotion text. If you're using product variations, you can also translate the variation attribute names. In Experience Builder, you can localize the store component labels.

Localize Product, Category, and Promotion Data

You can manually enter translated text for product and category names and descriptions. To translate promotion names and descriptions, you must use Translation Workbench. To perform bulk translations for product, category, or promotion data, use Translation Workbench.

Localize Product Variation Data

If you're using product variations, you can translate the variation attribute names into languages that your org supports to offer product variations in multiple locales.

Localize Store Labels

You can translate the labels for store components so that they display in the language of your store.

Localize Product, Category, and Promotion Data

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

You can manually enter translated text for product and category names and descriptions. To translate promotion names and descriptions, you must use Translation Workbench. To perform bulk translations for product, category, or promotion data, use Translation Workbench.

To do bulk translations, see Translation Workbench. If your store uses multiple languages and Translation Workbench is enabled, translate product data for each store language, including the store's default language, in order for product fields to be searchable.

To manually localize product or category data:

1. Go to the product or category that you want to add translations to.
2. Click the **Translations** tab.

   The Translations tab is available when you have Data Translation enabled for your org. See Enable Data Translation.
3. Click **Add Translation**.
4. Select the language, and enter the translated product or category name and description.
5. To apply the translation, rebuild the search index. See Update the Commerce Search Index.

Localize Product Variation Data

If you're using product variations, you can translate the variation attribute names into languages that your org supports to offer product variations in multiple locales.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Translate`, and then select **Translate**.
3. Under Select the filter criteria, enter these values.
   - Language—Select the language that you're translating to.
   - Setup Component—Select **Custom Field**.
   - Object—Select **Product Attribute**.
4. For each attribute, hover over the Field Label Translation column, and click the pencil icon to edit the field. Enter the translation for the field.
5. Repeat these steps for each language translation.

SEE ALSO:

Product Variations and Attributes

Localize Store Labels

You can translate the labels for store components so that they display in the language of your store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

Some component labels are translated for you into the selected language. For labels that are configurable using component properties, you can manually enter translated text. For B2B stores, you can use the export and import functionality to bulk translate store labels.

1. Localize store labels manually for B2B and D2C stores.
   a. From the store's home page, click **Website Design**.
   b. At the top of the navigation bar, select the store's language from the world icon dropdown.
   c. Enter the localized text in the component property fields.
   The label text stays with the component for that language. If you select a different language, the component label text displays what you've entered for that language.
2. Localize store labels using export and import for B2B stores.

   Note: Export and import functionality isn't currently available for D2C stores.

   a. From the store's home page, click **Website Design**.
   b. Click the gear icon, and select **Languages**.
   c. Click **Export Content**.
   d. Enter a name for the export file.
   e. Click **Export**.
   The export file is downloaded.
   f. Translate the labels in the export file.
   g. In Website Design, click the gear icon, and select **Languages**.

h. Click **Import Translation**.

i. Select the file with the translated labels to import into the store.

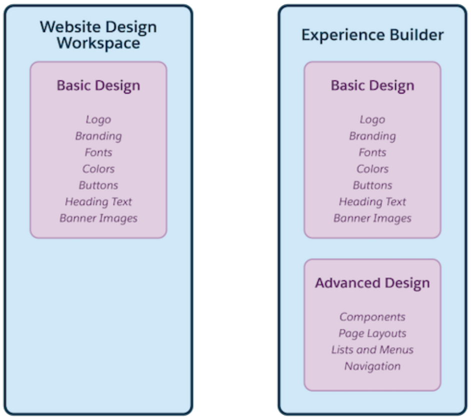
SEE ALSO:

Export Language Content

Import Translated Content

Website Design for Commerce Stores

Use the Website Design workspace to add basic design elements to your store without leaving the Commerce app. For example, add your logo and set fonts, colors, and button styles. For more advanced design changes, such as configuring store components, pages, or navigation, you can move out of the Commerce app to Experience Builder.



Design a Store in the Commerce Website Design Workspace

Use the Website Design workspace to add basic design elements to your store without leaving the Commerce app. Add your logo and set fonts, colors, and button styles. You can also modify the text and images on some pages.

Use Experience Builder to Design a Commerce Store

Use Experience Builder for advanced design tasks, such as configuring store components, pages, or navigation. With Experience Builder, you can make a B2B or D2C template yours by dragging components onto your page and customizing properties. You can add images and styles to your storefront to create a unique experience for your customers. You can also add markup to the `<head>` of every page.

Commerce Store Components

Components are the building blocks of commerce stores. You can make a B2B or D2C template yours by dragging components onto store pages and customizing component properties.

Design a Store in the Commerce Website Design Workspace

Use the Website Design workspace to add basic design elements to your store without leaving the Commerce app. Add your logo and set fonts, colors, and button styles. You can also modify the text and images on some pages.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

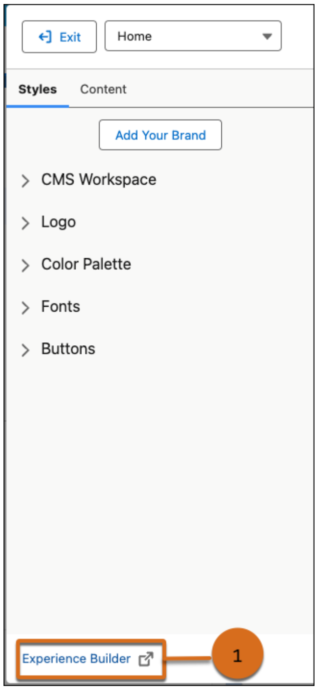
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Website Design**.

   To do more advanced design changes, such as configuring store components, pages, or navigation, click **Experience Builder** (1).



3. On the Styles tab, make your changes.

   The changes that you make in Styles affect all pages in the store.

   - To import the colors and styles from an existing site, click **Add Your Brand**.
   - To adjust the look of your store manually, click a style option.

   The CMS Workspace shows the workspace where image files, including the logo file, are stored. When you create a store, a CMS workspace and a public channel to that workspace are created. If that workspace is the only one associated with your store, that workspace is shown in the CMS Workspace section and you can't change it. If you have other CMS workspaces associated with the store, you can select which one to use from the dropdown.

4. To change the text or images on a page, use the dropdown to the select the page, and then on the Content tab, select a page section and make your changes.

5. (Optional) Preview your store before you publish it.
    1. Click **Save**.
    2. Click **Exit**.
    3. On the store home page, click **Preview**.
    4. Go back to the store home, and click **Website Design** in the navigation sidebar.
6. To publish your store, click **Publish**.
7. To leave the Website Design workspace, click **Exit**.

SEE ALSO:

Use Experience Builder to Design a Commerce Store

Use Experience Builder to Design a Commerce Store

Use Experience Builder for advanced design tasks, such as configuring store components, pages, or navigation. With Experience Builder, you can make a B2B or D2C template yours by dragging components onto your page and customizing properties. You can add images and styles to your storefront to create a unique experience for your customers. You can also add markup to the `<head>` of every page.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

To access Experience Builder from the Commerce App, click **Website Design** in the navigation sidebar, and then click **Experience Builder**. This section includes information specific to using Experience Builder to design Commerce stores. For complete information about using Experience Builder, go to Customize Sites with Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Add Trusted Sites for Scripts for a Commerce Store

If you require your store to access a script on an external host, in Experience Builder, add the external host as a trusted site.

Assign a Page Layout for a Custom Store Header or Footer

B2B and D2C stores created with the LWR template include responsive header and footer components. Alternatively, a developer can build a custom header or footer. For each page where you want to use a custom header or footer, assign the commerce custom layout using Experience Builder.

Update the My Account Theme Layout for a Commerce Store

The My Account theme layout provides persistent navigation on the left side of the page with page content appearing on the right. You can link to existing pages or create custom pages and add links to the layout's navigation menu. When you add navigation links to the menu, they appear on all pages that use the My Account layout.

Configure Default Store Navigation

Use Experience Builder to set up the default navigation of your B2B or D2C store to use product categories. Customers use the categories to navigate the store.

Create a Footer Link List Menu in a Commerce Store

By default, the Link List component is located in the footer of each page in your store. In Experience Builder, you can edit this component to link to pages that describe your company, your privacy policy, your return procedure, or other important information.

Enable Product Cards on Search Pages in a Commerce Store

The Results Grid component and the Product Card component enable product cards to display on the product list page. If you're creating a store after the Summer '24 release, the Results Grid component is configured by default. For stores created before Summer '24, you must use Experience Builder to add the component and configure it.

Format the Display of Product Cards on Search Pages in a Commerce Store

In Experience Builder, you can change the number of product card columns and the spacing between cards on the product list page.

Configure Page Numbers to Appear in a Commerce Store

When your search results return products that span multiple pages, configure page numbers to appear on your search and category pages. For stores created after Spring '24, page numbers are configured by default. For stores created before Spring '24, you can configure page numbers to appear.

Design the Cart Page in a Commerce Store

The Cart page is where customers can review everything they've added to their order before checking out. In Experience Builder, you can customize the page to show line item details, total costs, and savings. You can also style the checkout button, add a field for customers to enter coupon codes, and modify the cart badge.

Enable Customers to Add Products to Their Cart from Search Results

When customers search for products in your store, let them add the product to their cart directly from the search results page.

Customize the Profile Menu in a Commerce Store

In Experience Builder, you can define how you want your user profile menu to appear, including using company names and logos.

Create a Buyer Manager Profile Menu for B2B Stores

You might not want buyers to have access to the same user profile menu items as your buyer managers. In Experience Builder, you can create a separate user profile menu for buyer managers and edit the default profile to apply just to buyers.

Customize the Address Form Page in a Commerce Store

As an admin, you can customize a store's Address Form page for B2B and D2C stores using Experience Builder.

Customize the Address List Page in a Commerce Store

As an admin, you can customize a store's Address List page for B2B and D2C stores.

Website Design for the Checkout Page in a Commerce Store

The Checkout page is where customers enter their shipping and payment information to complete their order. Customize the Checkout page in Experience Builder to work with the shipping and payment services that are selected in your store settings.

Buyer's Lists for B2B Aura Stores

If you have a B2B store created with the Aura template, buyers can keep personal lists of products. Buyers can use lists in any way they like. For example, they can use lists to track past purchases, remind themselves of interesting products, and gather products for future purchase. A buyer can have up to 10 lists, and each list can contain up to 500 products.

Use Real Data to Customize the Order Summary Pages in B2B Aura

If you have a B2B store created with the Aura template, you can customize a store's order page or list of orders more effectively if you see real data in Experience Builder.

Add Trusted Sites for Scripts for a Commerce Store

If you require your store to access a script on an external host, in Experience Builder, add the external host as a trusted site.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, click and open the **Settings** menu (gear icon).
4. Click **Security & Privacy**, and then click **+ Add Trusted Site**.

   If you don't see the Add Trusted Site button, change the Security level setting from Strict: CSP to **Relaxed: CSP**. Then, click **Allow**. If you continue to have issues, turn off **Lightning Locker**

5. Enter the required information.
   a. Enter the name and URL.
   b. Select **Active**.
   c. Click **Add Site**.
6. Click **Add Site** again, and enter the required information.
   a. Enter the trusted site name and the trusted site URL.
   b. Select **Active**.
   c. Click **Add Site**.
7. Confirm that the site names and URLs are active and listed under Trusted Sites for Scripts.

SEE ALSO:

Website Design for Commerce Stores

Assign a Page Layout for a Custom Store Header or Footer

B2B and D2C stores created with the LWR template include responsive header and footer components. Alternatively, a developer can build a custom header or footer. For each page where you want to use a custom header or footer, assign the commerce custom layout using Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Complete these steps for each page where you want to use a custom header or footer.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder.**
3. In Experience Builder, click the gear icon on the page that you want to change.

4. In the Layout section, select the checkbox next to **Override the default theme layout for this page**.
5. From the Theme Layout dropdown, select **Commerce Custom Layout**.

The page now has blank top and bottom sections where the developer can add the custom header and footer. For more information, see Build Custom Components.

SEE ALSO:

Website Design for Commerce Stores

Update the My Account Theme Layout for a Commerce Store

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

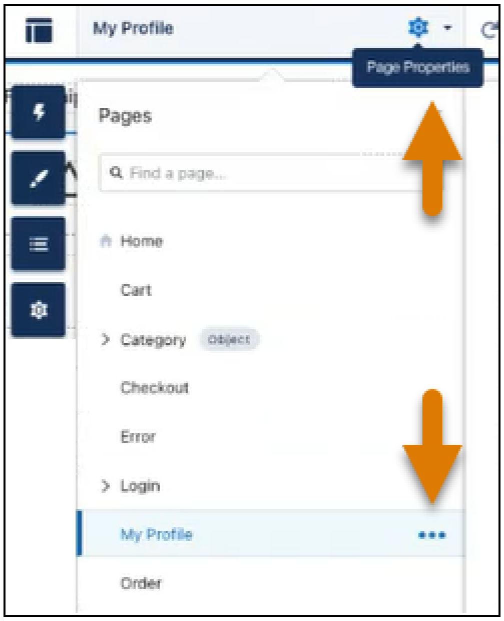
The My Account theme layout provides persistent navigation on the left side of the page with page content appearing on the right. You can link to existing pages or create custom pages and add links to the layout's navigation menu. When you add navigation links to the menu, they appear on all pages that use the My Account layout.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

B2B stores created with the LWR template, and D2C stores created as of the Winter '23 release, already have the My Account theme layout applied to the My Profile page. For an existing store, you can keep the current layout, or you can apply the new layout to all pages that you plan to include in your customers' My Account experience.

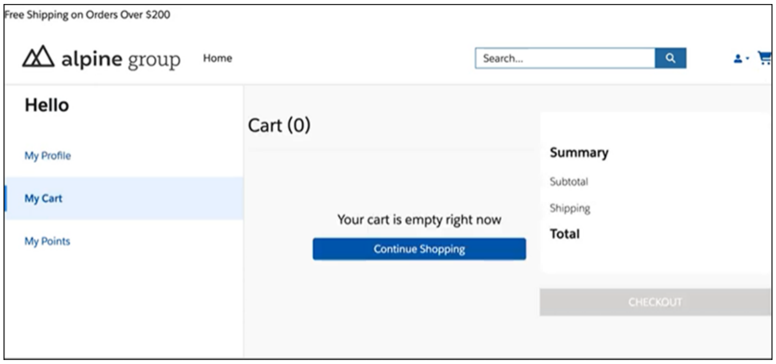
Note: My Account uses a different theme layout than other pages, for example, the Home page. Let's say you change the Home page header and you want that change to appear on My Account pages. Make the same change to the header on a page that uses My Account Layout.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the D2C Commerce store.
4. Go to the My Profile page.
5. Open the page actions.



- Click the Page Properties icon (see image, top arrow), and select **My Profile**.
- Click the ellipses icon. (see image, bottom arrow).

6. Select **Override the default theme layout for this page**.
7. From the Theme Layout menu, select **My Account Layout**.
8. Save your changes.
   The layout is applied, and you can add standard and custom pages to the navigation menu.



When your My Account experience is set up, your customers can link directly to the My Account Foundation page. For example, you can apply the My Account Layout to your cart. When customers click the cart icon, they navigate directly to My Account Foundation. The Cart navigation item is selected, and the Cart page appears on the right.

SEE ALSO:

Create Custom Pages with Experience Builder

Navigation Menu

Configure Default Store Navigation

Use Experience Builder to set up the default navigation of your B2B or D2C store to use product categories. Customers use the categories to navigate the store.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before a category can be included in store navigation, you mark it for inclusion in a menu. To select the categories to include, see Create Categories and Subcategories on page 82. Then update your search index for the changes to take effect.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, click the gear icon and select **Settings** > **Navigation**.
4. From the Default Navigation dropdown, select **Edit**.
5. Make sure that **Storefront Categories** is listed under the menu structure. If not, follow these steps to set up the store to use categories in the default navigation.
   a. Click **Add Menu Item**.
   b. From the Type dropdown, select **Data Source**.
   c. From the Data Source dropdown, select **Storefront Categories**.
   d. Select **Publicly available**.
6. (Optional) Add links to other pages in your storefront to the default navigation, in addition to the category links. For example, if you have a content page that describes your products or your company's initiatives, you can add a link to that page. The page link is displayed beside the category links.
   a. Click **Add Menu Item**.
   b. Enter a name for the menu item.
   c. From the Type dropdown, select **Site Page**.
   d. From the Data Source dropdown, select the page that you want to link to.
   e. Select **Publicly available**.
7. Click **Save Menu**.

For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce customer support to enable this functionality. To view a category or its descendent categories, the buyer or guest user must have entitlement to at least one product within the category. If a buyer has a direct link to a category that isn't entitled, the category still appears but doesn't show any products.

SEE ALSO:

Update the Commerce Search Index

Create a Footer Link List Menu in a Commerce Store

By default, the Link List component is located in the footer of each page in your store. In Experience Builder, you can edit this component to link to pages that describe your company, your privacy policy, your return procedure, or other important information.

EDITIONS

Available in: Lightning Experience

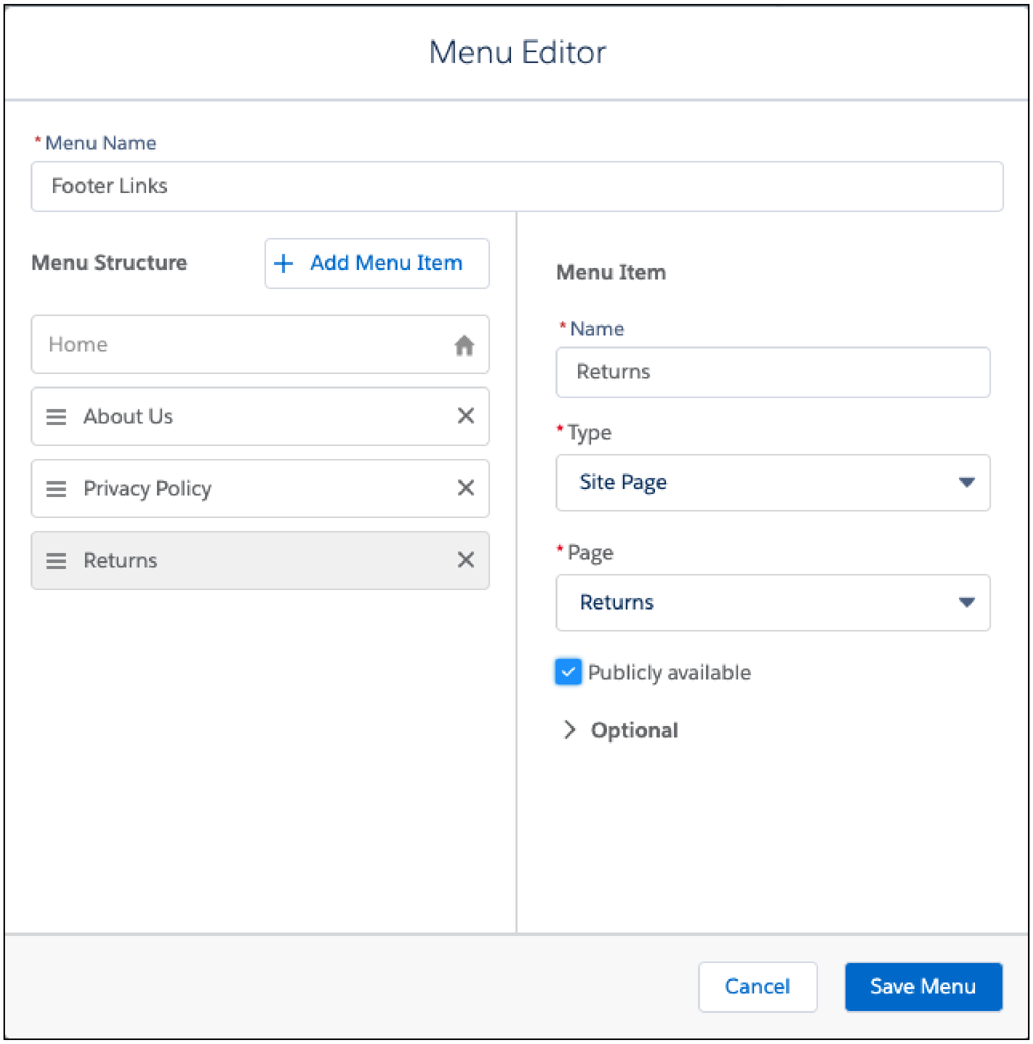
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, click the gear icon and go to **Settings** > **Navigation**.
4. Click **Add Navigation Menu**.
5. Enter a name for the menu, for example, `Footer Links`.
6. For each page that you want to add to the menu:
   a. Click **Add Menu Item**.
   b. From the Type dropdown, select **Site Page**.
   c. Enter a name for the menu item, for example, `About Us`.

      Shoppers see this label for the link.
   d. From the Pages dropdown, select the page that you want to link to.
   e. Select **Publicly available**.



*Menu Name: Footer Links

*Name: Returns

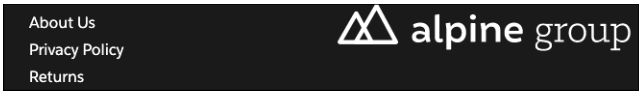
*Type: Site Page

*Page: Returns

☑ Publicly available

7. Click **Save Menu**.

When you configure the Link List component, select the menu to display the links in the storefront footer.



SEE ALSO:

LWR Store Components

Enable Product Cards on Search Pages in a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

The Results Grid component and the Product Card component enable product cards to display on the product list page. If you're creating a store after the Summer '24 release, the Results Grid component is configured by default. For stores created before Summer '24, you must use Experience Builder to add the component and configure it.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the search page.
4. Replace the Results component with the Results Grid component.
    a. On the main page canvas, select the Results component, and click the delete icon.
    b. Confirm that you want to delete the Results component.
    c. From the Components panel, drag the Results Grid component into the page's Results section.

       When you drag a component over a content or theme layout region, a label appears to identify the region. Components in a theme layout region have the label "Shared" added to the name because they're shared everywhere that the theme layout region is used. Components in a content layout region are specific to the page.

5. Edit the Results Grid component properties.
    a. Go to the component's Settings tab.
    b. For Data Source, select **Nested Expression**.
    c. For Expression, select **Product Cards**.

6. Add the Product Card component to the Results Grid component, and edit the Product Card component properties.

   The Product Card component enables products to display on the product list page.

    a. From the Components panel, drag the Product Card component into the sfdcRepeaterItem section of the Results Grid component.
    b. Go to the component's Settings tab.
    c. For Data Binding, ensure that {!Item} is entered.

       You must edit the Results Grid component properties again.

7. Edit the Results Grid component properties.
    a. Go to the component's Settings tab.
    b. For Expression Prefix, ensure that Item is entered.

If you change the Data Binding in the Product Card component, you must also update the Expression Prefix in the Results Grid component to match.

SEE ALSO:

Website Design for Commerce Stores

LWR Store Components

Format the Display of Product Cards on Search Pages in a Commerce Store

Format the Display of Product Cards on Search Pages in a Commerce Store

In Experience Builder, you can change the number of product card columns and the spacing between cards on the product list page.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the search page.
4. On the main page canvas, select the Results Grid component.
5. On the Settings tab in the Grid Layout section, enter the column and spacing settings.

   The number of product cards on the product list page varies depending on the browser width. The columns dynamically adjust for smaller and larger devices, such as a tablet or a wide desktop screen. If you select **Fewer**, product cards are larger. If you select **More**, product cards are smaller.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

SEE ALSO:

Website Design for Commerce Stores

LWR Store Components

Enable Product Cards on Search Pages in a Commerce Store

Configure Page Numbers to Appear in a Commerce Store

When your search results return products that span multiple pages, configure page numbers to appear on your search and category pages. For stores created after Spring '24, page numbers are configured by default. For stores created before Spring '24, you can configure page numbers to appear.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Configure Page Numbers on the Search Page

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Click **Website Design**.
3. In Experience Builder, open the search page.
4. Replace the Results component with the Results component.

Replacing the component resets the pagination setting to appear correctly.

  - **a.** On the main page canvas, select the Results component, and click the delete icon.
  - **b.** Confirm that you want to delete the Results component.
  - **c.** From the Components panel, drag the Results component into the page's Results section.

    When you drag a component over a content or theme layout region, a label appears to identify the region. Components in a theme layout region have the label "Shared" added to the name because they're shared everywhere that the theme layout region is used. Components in a content layout region are specific to the page.

5. Publish your store.

Configure Page Numbers on the Category Page

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Click **Website Design**.
3. In Experience Builder, open the category page.
4. Replace the Results component with the Results component.

   Replacing the component resets the pagination setting to appear correctly.

   - **a.** On the main page canvas, select the Results component, and click the delete icon.
   - **b.** Confirm that you want to delete the Results component.
   - **c.** From the Components panel, drag the Results component into the page's Results section.

     When you drag a component over a content or theme layout region, a label appears to identify the region. Components in a theme layout region have the label "Shared" added to the name because they're shared everywhere that the theme layout region is used. Components in a content layout region are specific to the page.

5. Publish your store.

SEE ALSO:

LWR Store Components

Design the Cart Page in a Commerce Store

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

The Cart page is where customers can review everything they've added to their order before checking out. In Experience Builder, you can customize the page to show line item details, total costs, and savings. You can also style the checkout button, add a field for customers to enter coupon codes, and modify the cart badge.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, go to the Cart page.
4. Customize the Cart component.

The Cart component contains the Cart Items component, along with an empty state that shows when the customer has no items in their cart.

   a. In the Cart component properties, select whether to show sort options. This setting is enabled by default for B2B stores.

   b. Click the empty state text to customize it.

5. Customize the Cart Items component.

The Cart Items component shows the products in the cart, along with the related details that you want to include. If your store was created before the Winter '25 release, pagination doesn't display in a live storefront. If you encounter this issue, replace the Cart Items component with the new component.

   a. To add a button so that customers can delete a line item from their cart, select **Show remove item option**.

   b. To customize how customers navigate multiple cart line items, select a Cart Item Pagination option. Options include scrolling, a Show More button, or pages.

   c. To show the total price for each line item, select **Show line item total**.

   d. In the Product Details section, select which information to show for each line item.

   e. In the Price Per Unit section, select whether to show the price per unit and customize the style.

   f. In the Original Price and Actual Price sections, select which prices to show and customize the style.

   The original price is the base price from the store's original price book. The actual price is the final price for the current customer. If the original price is higher than the actual price, it's crossed out.

   g. In the Promotion Details section, select whether to show the promotions for a line item and customize the style.

   h. In the Quantity Selector section, select whether to show the quantity selector and label. Edit the text for the quantity selector rules. Quantity rules apply only in B2B stores.

6. Customize the Cart Summary component.

The Cart Summary component shows a list of total costs and savings in the cart. The subtotal line includes the total for all cart items and any item-level promotions applied to individual products. The promotions field includes only cart-level promotions applied to the total transaction. All promotions are displayed below the cart summary.

   a. In the Cart Summary properties, select whether to show the original price, subtotal, promotions total, shipping total, and tax total.

   b. If your store tax type is Gross, select whether to show note that tax is included.

   c. In the Style section, edit the design properties.

   d. Click the text in the component to customize it.

7. Customize the Checkout Button component.

By default, the Checkout Button component is inside a Sticky Container builder component, so the checkout button remains on screen during mobile scrolling.

8. Customize the Promotions component to show a coupon field and a list of applied promotions.

9. (Optional) If you have Salesforce Payments and you want to provide digital wallet payment options, add the Express Checkout component.

Express Checkout supports Apple Pay, Google Pay, PayPal, and Venmo. In the component properties panel, enter a payment method set key and make other customizations as needed. Express Checkout doesn't support split shipping or subscriptions.

10. (Optional) Customize the Cart Badge component.

The Cart Badge is in the Commerce Header component and displays the number of items in the cart and an optional mini cart. The My Account page uses a different header than the Commerce Header, so make sure to customize the Cart Badge settings in both the Commerce Header and the My Account page header.

- **a.** To display settings for new features, like the mini cart, replace your Cart Badge component with the new component.
- **b.** To display the number of items in a customer's cart on the cart badge, select **Show number of items in cart**.
- **c.** Select **Total Items in Cart** or **Total Products in Cart**.

  Total products displays the number of unique items in the customer's cart, and total items counts all of them. If your store has Faster Add-to-Cart enabled, you can't select **Total Products in Cart**. See Improve Page Performance using Add-to-Cart for Commerce Stores.
- **d.** Customize the Mini Cart section to show a cart preview when a customer clicks the cart badge. The mini cart displays on all your store's pages, except the checkout page. Mini cart is enabled by default in stores created with the Winter '25 release or later.

11. Preview and publish your changes.

SEE ALSO:

Commerce Store Components

Add a Payment Method Set to a Checkout Page

Add a Payment Service for a Commerce Store

Enable Customers to Add Products to Their Cart from Search Results

When customers search for products in your store, let them add the product to their cart directly from the search results page.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Configure the Add to Cart Button

These steps apply to the Results component in B2B and D2C Commerce stores.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the search page.
4. From the Components panel, drag the Results component into the page's Results section.

   When you drag a component over a content or theme layout region, a label appears to identify the region. Components in a content layout region are specific to the page. Components in a theme layout region have the label "Shared" added to the name because they're shared everywhere that the theme layout region is used.
5. In the component's Results Display section, select **Show Call To Action Button**.
6. Use the customization options to tailor the button style and text.

Configure the Add to Cart Button (D2C Stores Only)

These steps apply to the Results Grid component in D2C Commerce stores.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the search page.
4. From the Components panel, drag the Results Grid component into the page's Results Layout section.

   When you drag a component over a content or theme layout region, a label appears to identify the region. Components in a content layout region are specific to the page. Components in a theme layout region have the label "Shared" added to the name because they're shared everywhere that the theme layout region is used.
5. Edit the Results Grid component properties.
   1. Go to the component's Settings tab.
   2. For Data Source, select **Nested Expression**.
   3. For Expression, select **Description**.
6. Add the Product Card component to the Results Grid component, and edit the Product Card component properties.
   1. From the Components panel, drag the Product Card component into the sfdcRepeaterItem section of the Results Grid component.
   2. Go to the component's Settings tab.
   3. For Data Binding, make sure that {!Item} is entered.
   4. In the Button Settings section, select **Show Add to Cart Button**.
   5. Use the customization options to tailor the button style and text.
7. Edit the Results Grid component properties again.
   1. Go to the component's Settings tab.
   2. For Data Source, select **Nested Expression**.
   3. For Expression, select **Product Cards**.

SEE ALSO:

Considerations for Commerce Product Bundles and Sets

LWR Store Components

Customize the Profile Menu in a Commerce Store

In Experience Builder, you can define how you want your user profile menu to appear, including using company names and logos.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, in the store header, click the **Profile Menu** component.

   In B2B stores created with the Aura template, the component is called the Customizable User Profile Menu component.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

4. From the Authenticated User Options dropdown, select **Edit Default User Profile Menu**.
5. Customize the user profile menu.
    - Select a menu item to edit its properties.
    - Drag menu items to reorder them.
    - To add a menu item, click **+Add Menu Item** and set its name, type, and other properties.
    - To delete a menu item, click the X next to its name.

SEE ALSO:

Create a Buyer Manager Profile Menu for B2B Stores

Create a Buyer Manager Profile Menu for B2B Stores

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

You might not want buyers to have access to the same user profile menu items as your buyer managers. In Experience Builder, you can create a separate user profile menu for buyer managers and edit the default profile to apply just to buyers.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, under Settings, click **Navigation**.
4. Click **Add Navigation Menu**.
5. Add a name and the menu items, and then click **Save Menu**.
6. In the store header, click **Profile Menu**.

    In B2B stores created with the Aura template, the component is called Customizable User Profile Menu component.
7. From the Authenticated User Options dropdown, select **Edit Default User Profile Menu**.
8. Remove the menu items that you don't want buyers to see, and click **Save Menu**.
9. Click **Personalize**, and assign the buyer manager profile menu to the buyer manager audience.

SEE ALSO:

Customize the Profile Menu in a Commerce Store

Customize the Address Form Page in a Commerce Store

As an admin, you can customize a store's Address Form page for B2B and D2C stores using Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, go to the Address Form page.
4. To view the Address Form page properties, click the page.
5. Make your changes.

   If you select **Show all address types**, buyers and shoppers can add or edit their shipping and billing addresses. When deselected, buyers and shoppers can add or edit only their shipping address. For B2B stores, the option is selected by default. For D2C stores, the option is deselected by default. Make sure that the setting matches the Show Address Type setting in the Address List page.

SEE ALSO:

Customize the Address List Page in a Commerce Store

Customize the Address List Page in a Commerce Store

As an admin, you can customize a store's Address List page for B2B and D2C stores.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, go to the Address List page.
4. To view the Address Form List properties, click the page.
5. Make your changes.

   By default, Show Address Type is set to Shipping and billing for D2C stores, and to Shipping for D2C stores. When you select shipping and billing, make sure that **Show all address types** is selected in the Address Form page.

SEE ALSO:

Customize the Address Form Page in a Commerce Store

Website Design for the Checkout Page in a Commerce Store

The Checkout page is where customers enter their shipping and payment information to complete their order. Customize the Checkout page in Experience Builder to work with the shipping and payment services that are selected in your store settings.

Design the Checkout Page in a Commerce Store

Use a preset layout and customize its components, or design a layout using sections and components to guide customers through the checkout process. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

Customize Shipping on a Store Checkout Page

After you set up your shipping calculation service, use Experience Builder to customize how you collect shipping details from your customers during checkout. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

Customize Payments on a Store Checkout Page

After you set up your payment service provider, use Experience Builder to customize how you collect payment and billing details from your customers during checkout. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

Customize Split Shipping for Commerce Stores

At checkout, use Experience Builder to let customers split a single cart into multiple shipments. Customers can specify a shipping method and destination for up to 10 shipments per order. You can't use split shipping with managed checkout or with digital or subscription products.

Design the Checkout Page in a Commerce Store

Use a preset layout and customize its components, or design a layout using sections and components to guide customers through the checkout process. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

If your B2B store was created with the Aura template, use flows to edit checkout. See B2B Commerce Checkout Flow.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, select the **Checkout** page.

   If you have a new D2C store, the checkout page displays the Checkout Layout: Salesforce component. This component is locked, and you can't customize it. To design your own page, first remove this layout.

   If you have an existing store without a Salesforce Payments license, your checkout page might be blank. Go to the next step to add layouts or components.

   If you have a store created before the Winter '24 release, you can replace legacy components. Legacy components are still supported, but they don't support new Commerce features. When you replace legacy components, you can't add them back.

   If you have a B2B store with Guest Checkout enabled, you must replace the legacy components. Otherwise, email verification fails at checkout.

4. Add a preset layout. The checkout layouts include the necessary components for an optimized checkout experience.

   If you prefer to design your own layout, use sections. The Checkout Section component contains a heading, an Action button, and content space for components. You can add and remove sections, and add or remove components within a section. You can't add a promotion section to a custom layout.

   a. From the component menu, drag a checkout layout on to your page.

      The one-page layout displays all checkout sections and forms on a single page. The accordion layout contains sections that expand and collapse as a customer completes the checkout steps. To change the navigation button label for each section, customize the Action Button component.

   b. If your store was created before the Winter '24 release, add the Place Order Button and Checkout Error Notification components to your layout component.
   c. To show Promotions and the option to enter coupons in Cart Summary, on the layout component, select **Show the checkout summary column**.

5. If you're using the One-Page layout or Accordion layout, enable the Checkout Summary component.
   a. To open your layout's component settings, click the **Checkout Layout: One-Page** or **Checkout Layout: Accordion** component on your page.
   b. To show a summary of cart information including price, promotions, and cart items that pins to the right side of the screen, select **Show the checkout summary column**.
   c. To show a collapsible list of cart items for mobile checkout, select **Show expandable cart items by default**.
   d. Edit the Expandable Summary Heading for Mobile label.

SEE ALSO:

Customize Payments on a Store Checkout Page

Customize Shipping on a Store Checkout Page

LWR Store Components

Customize Shipping on a Store Checkout Page

After you set up your shipping calculation service, use Experience Builder to customize how you collect shipping details from your customers during checkout. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, select the **Checkout** page.

   If you don't see any shipping components in your layout or your page is blank, drag the components onto your page. See Design the Checkout Page in a Commerce Store

4. Click the **Shipping Address** component to customize it.
   a. Select whether to show only the customer's default shipping address. For this setting, if a registered customer has a saved shipping address set as their default, it's preselected in checkout. Customers can choose to edit it or add an address.
   b. Edit the address list and address form settings as needed.
5. Click the **Shipping Method** component to customize it.

This component pulls shipping options from your store's shipping service. See Set Up Shipping for Commerce Stores on page 130.

6. If your store allows guest shopping, click the **Contact Information** component to customize it.

   This component is required if you've turned on guest access so you can collect name and contact information from guest users. See Manage Guest Access on page 74.

   When registered users return to the checkout page, they only see their phone number and email address in the Contact Information section.

7. (Optional) Click the **Shipping Instructions** component to customize it. To let customers know the type of information to include, add placeholder text to the properties.
8. Preview and publish your changes.

SEE ALSO:

Shipping for Commerce Stores

Design the Checkout Page in a Commerce Store

Commerce Store Components

Customize Payments on a Store Checkout Page

After you set up your payment service provider, use Experience Builder to customize how you collect payment and billing details from your customers during checkout. You can customize checkout only if your store uses custom checkout. If your store uses managed checkout, you can't customize your checkout page.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, select the **Checkout** page.
4. In the payment section of your layout, add or customize a payment component.

   If you don't see a payment component in your layout or your page is blank, drag the components onto your page. See Design the Checkout Page in a Commerce Store

   - If you have Salesforce Payments, use the Salesforce Payments component. In the component properties panel, enter a payment method set key, select whether to use manual capture, select whether to enable saved payments, and make other customizations as needed. If you have a B2B store, you can also choose to show a purchase order option.
   - If you have a third-party payment provider, use the Payment or Dual Payment component (B2B only). The Payment component includes a credit card option. The Dual Payment component includes both a credit card option and a purchase order option.
   - If you want your B2B store to accept only purchase orders, use the Purchase Order component.

5. (Optional) If you have Salesforce Payments and you want to provide digital wallet payment options, add the Express Checkout component.

   Express Checkout supports Apple Pay, Google Pay, PayPal, and Venmo. In the component properties panel, enter a payment method set key and make other customizations as needed. Express Checkout doesn't support split shipping or subscriptions.

6. Add or customize the Billing Address component.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

The Payment component includes a Billing Address component by default.

7. (Optional) If you have Salesforce Payments, customize the Payment Processing page.

   If you offer a payment option that sends your customers to a third-party site during checkout, this page redirects them back to your store.

8. Preview and publish your changes.

SEE ALSO:

Salesforce Payments

Add a Payment Method Set to a Checkout Page

Add a Payment Service for a Commerce Store

Design the Checkout Page in a Commerce Store

Customize Split Shipping for Commerce Stores

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

At checkout, use Experience Builder to let customers split a single cart into multiple shipments. Customers can specify a shipping method and destination for up to 10 shipments per order. You can't use split shipping with managed checkout or with digital or subscription products.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

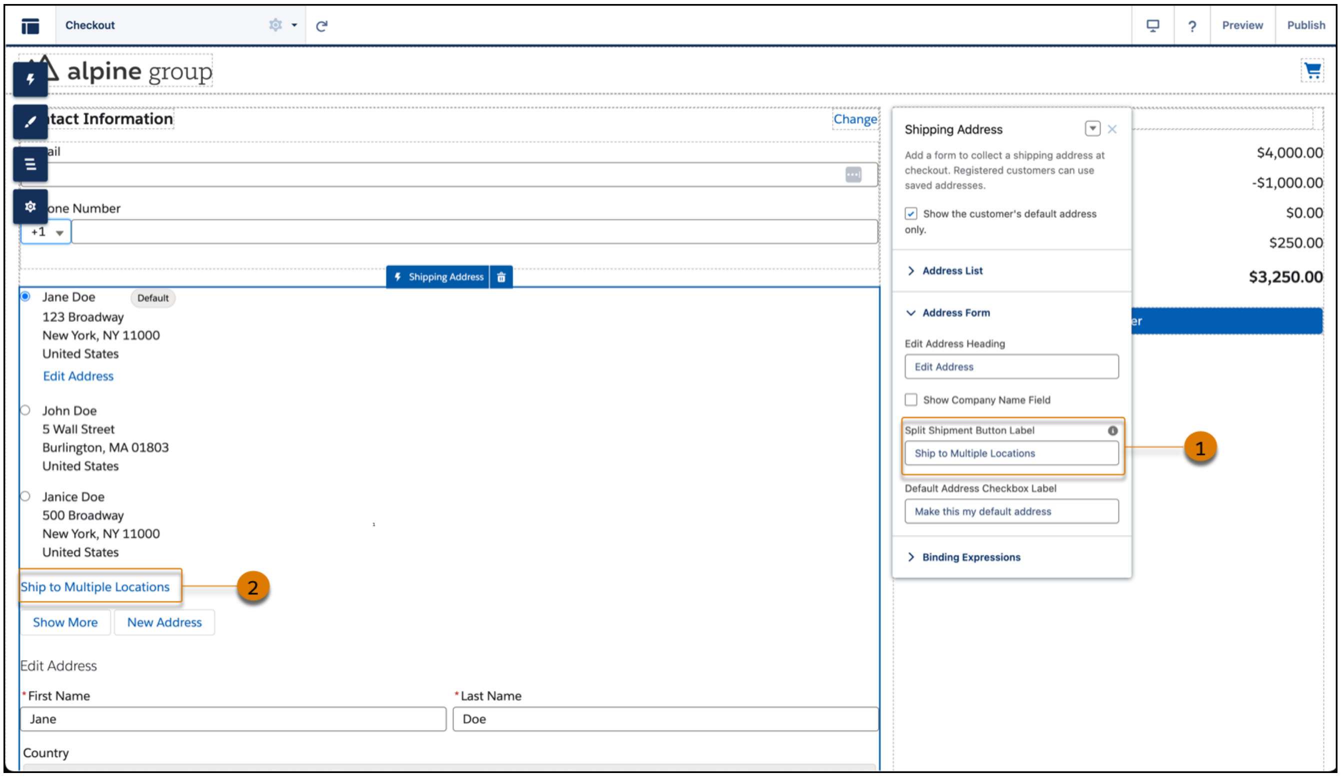
Before customizing split shipping, enable it for your store. See Enable Split Shipping for Commerce Stores.

Split shipping doesn't work with legacy checkout components. If you haven't updated your Checkout page with the latest components, see Set Up the Checkout Page on page 343.

1. In the navigation sidebar, select a store from the Store dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, go to the Checkout page to customize the split shipping button.

   The button opens the Split Shipment page where customers can split the cart items and enter the delivery addresses. To change the button name, edit the Shipping Address component (1). If you don't see the Ship to Multiple Locations button (2) in the Shipping Address component, refresh the page. If you still don't see it, remove the Shipping Address component and then add it back to your page.

   For guest users, the Ship to Multiple Locations button appears after the user enters an address. For registered users, the button is always shown because their default address is saved.



Shipping Address

Add a form to collect a shipping address at checkout. Registered customers can use saved addresses.

☑ Show the customer's default address only.

Address List

Address Form

Edit Address Heading: Edit Address

☐ Show Company Name Field

Split Shipment Button Label: Ship to Multiple Locations

Default Address Checkbox Label: Make this my default address

Binding Expressions

4. On the Split Shipment page, add the Checkout Header, Split Shipping Header, and Split Shipping Cart Item components if they aren't already added and customize them as needed.

   When a customer splits an order, they can add or remove split items on the Split Shipment page, but they can't remove the original item from their cart on this page. Customers must remove cart items on the cart page.

   If a customer adds an address for a split item on the Split Shipment page and then deletes the original item from the cart, the address still displays. To remove the address, the customer must remove it on the Split Shipment page before removing the original item from the cart.

5. Preview and publish your changes.

Buyer's Lists for B2B Aura Stores

If you have a B2B store created with the Aura template, buyers can keep personal lists of products. Buyers can use lists in any way they like. For example, they can use lists to track past purchases, remind themselves of interesting products, and gather products for future purchase. A buyer can have up to 10 lists, and each list can contain up to 500 products.

Add Fields to Buyer's Lists for B2B Aura Stores

In a buyer's list, each item shows the same default product data. To show more product information, you can add up to three more fields using Experience Builder.

Remove Lists from Your B2B Aura Store

If you don't want to offer buyers the option to create personal lists, you can remove the list feature from your store using Experience Builder.

Add Fields to Buyer's Lists for B2B Aura Stores

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

In a buyer's list, each item shows the same default product data. To show more product information, you can add up to three more fields using Experience Builder.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Buyers lists are available in B2B stores created with the Aura template.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, open the My Lists page, and select the **My Lists** component.
4. In the property editor, expand the Product Data section, and click **Add Field**.
5. Click the field name.
6. In the Edit Field window, select the field to add.
7. Optionally, in the Display Name field, enter the field name to show to customers.
8. To add more fields, repeat this process.
9. Preview and publish your changes.

SEE ALSO:

Buyer's Lists for B2B Aura Stores

Remove Lists from Your B2B Aura Store

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

If you don't want to offer buyers the option to create personal lists, you can remove the list feature from your store using Experience Builder.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Buyer lists are available in B2B stores created with the Aura template.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. In Experience Builder, go to the Product Detail page, and select the **Product Detail Card** component.
4. In component properties, expand the Add to List Button section, and deselect **Show Add to List button**.
5. Open the Cart page, and select the **Cart** component.
6. In component properties, expand the Add All to List Button section, and deselect **Show Add All to List button**.
7. On any page, select the **Multilevel Navigation Menu** component, and in component properties, click **Edit Default Navigation**.
8. Remove the My Lists page from the navigation menu.

9. Preview and publish your changes.

SEE ALSO:

Buyer's Lists for B2B Aura Stores

Use Real Data to Customize the Order Summary Pages in B2B Aura

If you have a B2B store created with the Aura template, you can customize a store's order page or list of orders more effectively if you see real data in Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**, and then click **Experience Builder**.
3. Get the record ID of the account with the order data that you want to view.

   To get the Account record ID, navigate to the account, and copy the ID from the URL.
4. In Experience Builder, go to the **Order Summary List** page.
5. To show Order List component properties, click the component.
6. In the Account ID field, enter the Account record ID.
   The Order List component now shows all orders placed by that account.
7. (Optional) To view an order from that account, click **Preview** and select the order to preview.
8. Click **Back to Builder**, and customize the page with the selected list or order in view.

SEE ALSO:

Use Experience Builder to Design a Commerce Store

Commerce Store Components

Components are the building blocks of commerce stores. You can make a B2B or D2C template yours by dragging components onto store pages and customizing component properties.

LWR and Aura Store Templates

Starting with Summer '23, all new B2B and D2C stores are built on the Lightning Web Runtime (LWR) platform. Some B2B stores still use the Aura platform and, in some places, the Commerce App UI and documentation still refer to Aura features and components. If you're using a new LWR store, you can ignore the Aura information.

LWR Store Components

Stores created with the B2B Commerce (LWR) or D2C Commerce (LWR) template share most of the same Commerce components in Experience Builder. In some cases, these components have different default settings based on the type of store. The B2B Reorder template is a streamlined option that excludes some components.

Einstein Recommendations Component (LWR) for D2C Stores

The Einstein Recommendations component personalizes the shopping experience and reduces the manual effort required to drive product discovery on your storefront.

Expressions in Commerce Components

Expression Language is a specialized syntax that pulls data into an LWR component in Experience Builder. You can use expressions instead of static text to make your B2B or D2C store more customized and dynamic.

LWR and Aura Store Templates

Starting with Summer '23, all new B2B and D2C stores are built on the Lightning Web Runtime (LWR) platform. Some B2B stores still use the Aura platform and, in some places, the Commerce App UI and documentation still refer to Aura features and components. If you're using a new LWR store, you can ignore the Aura information.

Having all stores use the LWR platform allows you to build D2C and B2B stores using the same technology and components. LWR components use building blocks, which break up large components into smaller units, making it easier to customize components. For example, a Product Page can contain three multifunctional components with rich and varied features. Traditionally, customizing elements on the page required addressing all the components and rebuilding the entire page. The investment in time and resources can be steep.

With building block components, LWR store pages are broken into discrete units of functionality that are easier and faster to customize. For example, it's easier to add a custom variations component to the Product Page because you can swap out one component instead of rebuilding the entire page. You can drag building blocks onto a page from the Experience Builder component catalog as for other store components.

If you're using a B2B store built on an older Aura template, we recommend migrating the store to an LWR template. See the B2B Commerce Aura to LWR Migration Guide.

SEE ALSO:

Create a Commerce Store or Reorder Portal

LWR Store Components

B2B Commerce Aura to LWR Migration Guide

LWR Store Components

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Stores created with the B2B Commerce (LWR) or D2C Commerce (LWR) template share most of the same Commerce components in Experience Builder. In some cases, these components have different default settings based on the type of store. The B2B Reorder template is a streamlined option that excludes some components.

This table describes only the options listed in the Commerce section of the Components menu. Commerce templates also include other Experience Builder components.

Component	Description
Action Button	Shows a button for page level actions, such as Edit or Proceed.
Add Address Button	Shows a button that takes the customer to a form to add a shipping or billing address.

Component	Description
Address Form	Shows a form to collect shipping or billing address details. When a customer adds an address, they can choose to set it as their default.
Address List	Shows a customer their saved shipping and billing addresses, which they can edit or remove.
Applied Promotions	Shows a list of all manual and automatic promotions applied to the cart. The Applied Promotions component is a subcomponent of the Promotions component.
Billing Address	Shows a form to collect a billing address at checkout.
Breadcrumbs	Shows a link path to the current page in your store. Choose whether to include the home page at the start of the link path, and whether to set the last item as a link to the current page.
Cart	Contains the cart items component and a customizable empty cart state.
Cart Badge	Shows a clickable icon that takes the customer to their cart. Shows the Mini Cart settings to customize a sliding mini cart preview.
Cart Items	Shows the contents of the cart.
Cart Summary	Shows the total cost and savings in the cart, including the subtotal, promotions, shipping, and tax.
Category Banner	Specify the color of the category name displayed on the banner. Make sure that the banner image has a landscape orientation. The recommended maximum height is 300 pixels. By default, the image is centered on the page.
Checkout Button	Shows a button that the customer clicks to begin the checkout process.
Checkout Header	Shows a simplified page header to keep customers focused on checkout. By default, this component includes the Site Logo and Cart Badge components.
Checkout Inventory Reservation	Creates a reservation before the payment data is executed. The component's Request Inventory Reservation label is visible only to admins, not to shoppers. To display inventory information, customize the component with the Salesforce Omnichannel Inventory Resources APIs.

Component	Description
Checkout Layout: Accordion	Shows an accordion layout during checkout, which contains sections that expand and collapse in a specific order. By default, this component includes other building block components.
Checkout Layout: One-Page	Shows a one-page layout during checkout with these sections that a customer can complete in any order. • Shipping section with the Contact Information, Shipping Address, and Shipping Instructions components • Shipping method section with the Shipping Method component • Payment section with the Payment, Billing Address, Checkout Notification, and Place Order Button components
Checkout Layout: Salesforce	Shows an accordion layout during checkout, which contains sections that expand and collapse in a specific order. By default, this component is locked if your store uses managed checkout.
Checkout Notification	Shows a message for a notification or error that occurs at checkout.
Checkout Section	Divides checkout into sections. Add a heading and checkout components to each section. See Design the Checkout Page in a Commerce Store on page 343
Checkout Summary	Contains the Cart Summary, Promotions, and Cart Items components. Displays on the right-hand side of the checkout page and expands and collapses on mobile. Available for D2C stores.
Commerce Header	Contains the components that you want to appear at the top of each page in your store. By default, this component includes the site logo, multilevel navigation menu, search input, profile menu, and cart badge.
Contact Information	Shows a form to collect email address and phone number details at checkout.
Country Selector	Shows a list of available countries based on the store's market configuration. The customer's selection determines which language, currency, prices, products, and promotions are shown.
Coupons	Shows a coupon field. The Coupons component is a subcomponent of the Promotions component. If your store doesn't have manual promotions, you can delete the Coupons component.
Currency Formatter	Formats currency for the customer's country.

Component	Description
Dual Payment (B2B only)	Shows a form to collect credit card or purchase order details at checkout. If you have Salesforce Payments, use the Salesforce Payments component instead.
Einstein Recommendations (D2C only)	Shows personalized product recommendations based on the customer's individual browsing behavior. See Einstein Recommendations Component for D2C Stores on page 356.
Express Checkout	Shows buttons for Express Checkout payment options. Requires Salesforce Payments. Isn't supported with split shipping or subscriptions.
Frequently Bought Together	Show customers products that are bought alongside the items that they're shopping for. Product recommendations are generated by Einstein and are based on customer interactions with the storefront.
Filters	Shows filters for search.
My Account Password	Shows a link for a customer to reset their password on their profile page.
My Profile	Shows the customer's name, email address, and phone number on their profile page.
Navigation List Menu	Displays a list of pages in your store. Usually appears in the left column on desktop computers and at the top of some mobile devices.
Order Amount	Shows a summary of costs and savings for a previous order. All selected fields display in the currency of the order.
Order Confirmation	Shows a confirmation message with the order reference number.
Order Details	Shows details about a previous order. By default, includes the date, account, order name, and status.
Order List	Shows a list of previous orders. Customers can filter, sort, and reorder items. To change the data displayed when a buyer switches to an external account, see Allow Buyers Access to External Accounts for B2B Stores on page 72.
Order History	Shows a list of ordered products with an image for each order.
Order Lookup	Shows a form where guest users enter their information to access their order details. Can be used only when guest access in your store is enabled.

Component	Description
Order Products	Shows the shipments and products for a previous order.
Order Summary Products (B2B only)	Shows a list of the products that are included in an order summary, grouped by delivery group.
Order Summary Promotions	Shows all promotions applied to a previous order.
Page Error Message	Shows an invalid page error message.
Payment	Shows a form to collect payment details at checkout. If you have Salesforce Payments, use the Salesforce Payments component instead.
Payment Processing	Shows a payment processing message when customers are redirected from a third-party site back to your store. Requires Salesforce Payments.
Place Order Button	Shows a button that completes the checkout process.
Product Attachments	Shows a list of links to files that are related to your products, such as a specification sheet or user guide. You specify the files to list on the product's Media tab in the Product Workspace.
Product Bundle	Shows an expandable section to display a product bundle's child products.
Product Bundle Child Component	Shows the child products for a product bundle.
Product Detail Headings	Shows a header with the name of the product, the SKU, and other product fields added from the builder properties.
Product Detail Purchase Options	Shows the Add to Cart button and quantity selector.
Product Details (Tabular)	Shows the product name and information in a table format.
Product Image Gallery	Shows one or more images of a product. You can select the direction of the carousel images. Supports up to three images.
Product Pricing Details	Shows discounted and promotional pricing details on the Product Detail page.
Product Pricing Information	Shows pricing and promotion information based on the store's price book.
Product Set	Shows the products in a product set.
Product Variants	Shows the variant selector dropdown menu to select a variation of the parent product.
Promotions	Shows a coupon field and the applied promotions. Contains the Coupons component and Applied Promotions component.

Component	Description
Purchase Order (B2B only)	Shows a field to collect a purchase order number at checkout. Only registered customers can generate a purchase order.
Quantity Selector	Controls the quantity of items to add to an order. Shows a number input field with clickable arrows that increase or decrease the value.
Quick Order	Shows a simple form for customers to enter SKUs to add products to their cart.
Reorder Button	Shows a button that lets customers start a new order based on a previous order.
Results	Shows products on results pages. Only customers who are entitled to access the associated products can view them in search results. The Results component only supports up to 4 product fields.
Results Grid (D2C Only)	Shows products on results pages. Only customers who are entitled to access the associated products can view them in search results. You must configure the Product Card component within the Results Grid component.
Results Layout	Contains components on results pages. For example, you can configure the Filters, Sort Menu, and Results components within the Results Layout component.
Salesforce Payments	Shows a form to collect payment details using Salesforce Payments at checkout. This component requires Salesforce Payments. If you have another payment provider, use the Dual Payment or Payment component instead. See Salesforce Payments.
Saved Payment Methods	Shows a customer's saved payment methods to use at checkout.
Shipping Address	Shows a form to collect a shipping address at checkout. Registered customers can use saved addresses.
Self-registration	Shows a form that lets customers register for your store when self-registration is enabled. See Configure Self-Registration for Commerce Stores.
Shipping Instructions	Shows a text field for shipping instructions at checkout.

Component	Description
Shipping Method	Shows radio buttons for shipping options at checkout. Shipping method options are pulled from shipping integration settings.
Shop by Category	Shows tiles for products grouped into categories.
Sort Menu	Shows a dropdown that the customer can use to sort search results.
Split Shipping Cart Item	Shows a list of cart items and their shipment details. Requires enabling Split Shipping.
Split Shipping Header	Shows a header to save or cancel a split shipment. Requires enabling Split Shipping.
Sticky Container	Contains the components that you want to remain on-screen during mobile scrolling.
Subscription Policy	Shows a subscription policy disclaimer. This component shows only if a subscription is in the cart.
Tiered Discounts	Shows tiered discounts for a product, if available. See Set Up Price Tiering on page 124.
Top Sellers	Shows products in a category that you specify. Enter the ID of the category to display. If you don't specify a top sellers category, the header text doesn't display on the page.
Wishlist	Shows all the products in a customer's wishlist.
Wishlist Product	Shows a product in a customer's wishlist. Includes options to add the product to a cart or remove it from the wishlist.

SEE ALSO:

Standard Components for LWR Templates

Einstein Recommendations Component (LWR) for D2C Stores

The Einstein Recommendations component personalizes the shopping experience and reduces the manual effort required to drive product discovery on your storefront.

Property	Details
Recommendations Definition	
`Anchor`	Select an option to use as initial input for making recommendations on this page. Selecting the Product ID or Catalog ID anchor shows a field where you must add a product or catalog ID to complete your selection.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce

Property	Details
`Product ID`	Add a site-specific product ID starting with 01t. This field appears only when you select the Product ID anchor. To find the product ID, select a specific product in the Commerce App and copy the product ID from the browser URL.
`Catalog ID`	Add a site-specific catalog ID starting with 0ZG. This field appears only when you select the Catalog ID anchor. To find the catalog ID, select a specific product in the Commerce App and copy the catalog ID from the browser URL.
`Use Case`	Select the recommendation outcome that you want shoppers to see. Choose from recently viewed, similar products, and the like. Use cases have predefined strategies and rules that respond to shopper interactions in real time. Selections for use cases change dynamically based on the page containing the component and the anchor that you select. See the Usage Notes for details about each use case.
`Header Text`	Enter text to show at the top of the Einstein recommendations carousel. Header text appears to shoppers only when recommendations are generated and when the number of recommendations exceeds the value defined for the `Hide for Results Fewer Than` parameter.
`Maximum Products Visible`	Set the maximum number of products to show before advancing the recommendations carousel to the next set of products. The default is 4. Regardless of this setting, mobile devices show a maximum of two recommendations at a time. If you choose to show the quantity selector and call to action button, mobile devices display only one recommendation at a time.
`Hide for Results Fewer Than`	Set a minimum number of products to show. If there are fewer products than the number specified, the component doesn't appear. The default is two products.
Display Options	
`Product Text`	Select to show the product name for each product recommended.
`Price`	Select to show price information for each product recommended. When selected, you can choose whether to show the sale price with the original price crossed out or only the sale price.
`Quantity Selector and Call to Action Button`	Select to show the quantity selector and the call to action button. When selected, you can also change the quantity selector label text and the text that appears in the call to action button. Selecting this option limits the display to one recommendation at a time for mobile devices.
Price options menu	Choose between Sale Price with Original Price Crossed Out or Sale Price. This parameter appears only when the Price option is selected.
Quantity Selector Label	Change the label text associated with the quantity selector. The default is qty. This parameter appears only when the Quantity Selector and Call to Action Button option is selected.

Property	Details
Call to Action Button Text	Change the text that appears in the call to action button. The default is Add To Cart. This parameter appears only when the Quantity Selector and Call to Action Button option is selected. Inventory availability isn't checked when products are added to the cart using Einstein recommendations.

Usage Notes

Commerce Einstein can provide product recommendations based on shopper activity. You can add one or more Einstein Recommendations components to any page in D2C stores. You can customize the Einstein components using supported anchors and related use cases. The Category Viewed anchor is supported on only Category pages. All other anchors are supported on any page, but they're intended for use on certain pages.

Note: Adding Einstein Recommendations components to page headers and footers isn't supported.

When you select an anchor for a page, the use case menu changes to show only the supported options for that anchor.

Anchor	Intended Pages	Supported Use Cases
No Anchor	Home, Search, Error, My Profile, Service Not Available	Recently Viewed, Top Selling, Personalized for Shopper
Product ID	Home, Error, My Profile, Service Not Available	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought
Product Viewed	Product	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought
Products in Cart	Cart, Checkout, Order	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought, Upsell
Category ID	Home, Error, My Profile, Service Not Available	Recently Viewed, Most Viewed By Category, Top Selling By Category
Category Viewed	Category	Recently Viewed, Most Viewed By Category, Top Selling By Category

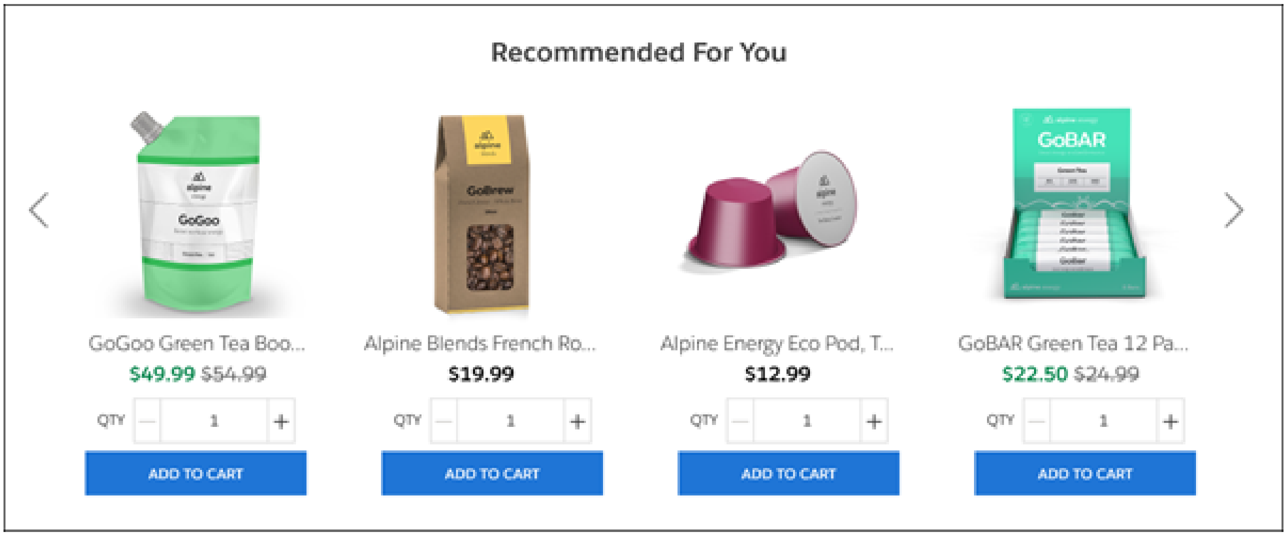
A use case defines the type of recommendations that Commerce Einstein shows. The strategies listed in the table are in order of occurrence. If there isn't enough shopper activity for the first strategy listed, the next strategy on the list is used. The Text Similarity strategy works even when there's no shopper activity.

Note: All use cases, except Recently Viewed, can have up to 20 products for recommendations. The Recently Viewed use case shows up to the last 10 browsed products.

Use Case	Strategies	Description
Recently Viewed	Last browsed products	Generates recommendations based on items that the shopper recently viewed.

Use Case	Strategies	Description
Similar Products This use case recommends products that match the category of the product being viewed.	1. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	2. Product affinity algorithm	Generates recommendations by analyzing the product's similarity to other products.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Complementary Products This use case recommends products that don't match the category of the product being viewed.	1. Real-time personalized recommendations	Generates recommendations by analyzing the shopper's current viewing and past viewing behavior.
	2. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Customers Also Bought This use case doesn't show products purchased by the shopper in the past 30 days.	1. Customers who bought also bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who bought the same product.
	2. Customers who viewed ultimately bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who viewed the same product.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Most Viewed By Category	Recent most-viewed products from category	Generates recommendations by analyzing which products other shoppers recently viewed in the same category for the product being viewed.
Top Selling By Category	Recent top-selling products for the category within the past 30 days	Generates recommendations by analyzing which products were recently purchased by other shoppers in the category being viewed. This strategy uses a rolling 30-day time frame that updates daily to return recommendations that are similar to top sellers found in your weekly sales reporting.

Use Case	Strategies	Description
Upsell	1. Customers who bought also bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who bought the same product.
	2. Customers who viewed ultimately bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who viewed the same product.
	3. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	4. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Top Selling	Top-selling products within the past 30 days	Generates recommendations by analyzing which products were recently purchased by other shoppers. This strategy uses a rolling 30-day time frame that updates daily to return recommendations that are similar to top sellers found in your weekly sales reporting.
Personalized for Shopper	1. Real-time personalized recommendations	Generates recommendations by analyzing current and past viewing behavior of the shopper.
	2. Recent most-viewed products	Generates recommendations by analyzing which products other shoppers recently viewed.



Expressions in Commerce Components

Expression Language is a specialized syntax that pulls data into an LWR component in Experience Builder. You can use expressions instead of static text to make your B2B or D2C store more customized and dynamic.

Adding an Expression to a Commerce Component

Enter expressions into any LWR component on a page with data providers. In some components, you can select an expression from a provided list. You can also combine expressions or add values.

Control When a Commerce Component Is Visible

Create dynamic visibility rules to control when a component is visible on the storefront. Use Expression-Based Visibility (EBV) to show and hide storefront components based on ecommerce data-driven conditional expressions.

Create Multiple Versions of a Commerce Component

Create multiple versions of a component, and assign visibility rules to target specific customer groups with each variation. Use Component Variations to tailor the shopping experience for different customers.

Data Expressions for Commerce Cart Components

Use these data expressions in any component on the cart page.

Data Expressions for Commerce Order Components

Use these data expressions in any component on the order summary details page.

Data Expressions for Commerce Product Components

Use these data expressions in any component on the product page.

Data Expressions for Commerce Search Components

Use these expressions in any component on the Search page.

SEE ALSO:

Use Expressions to Add Dynamic Data to LWR Sites

Adding an Expression to a Commerce Component

Enter expressions into any LWR component on a page with data providers. In some components, you can select an expression from a provided list. You can also combine expressions or add values.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

B2B and D2C Store Pages with Data Providers

The expressions that you can use in a component depend on which data providers are available on the page. Pages with Commerce-related data provider components are:

- Cart page—Access cart details and totals
- Checkout page—Access checkout details
- Order Summary page—Access order data
- Product page—Access product data
- Search page—Access search data

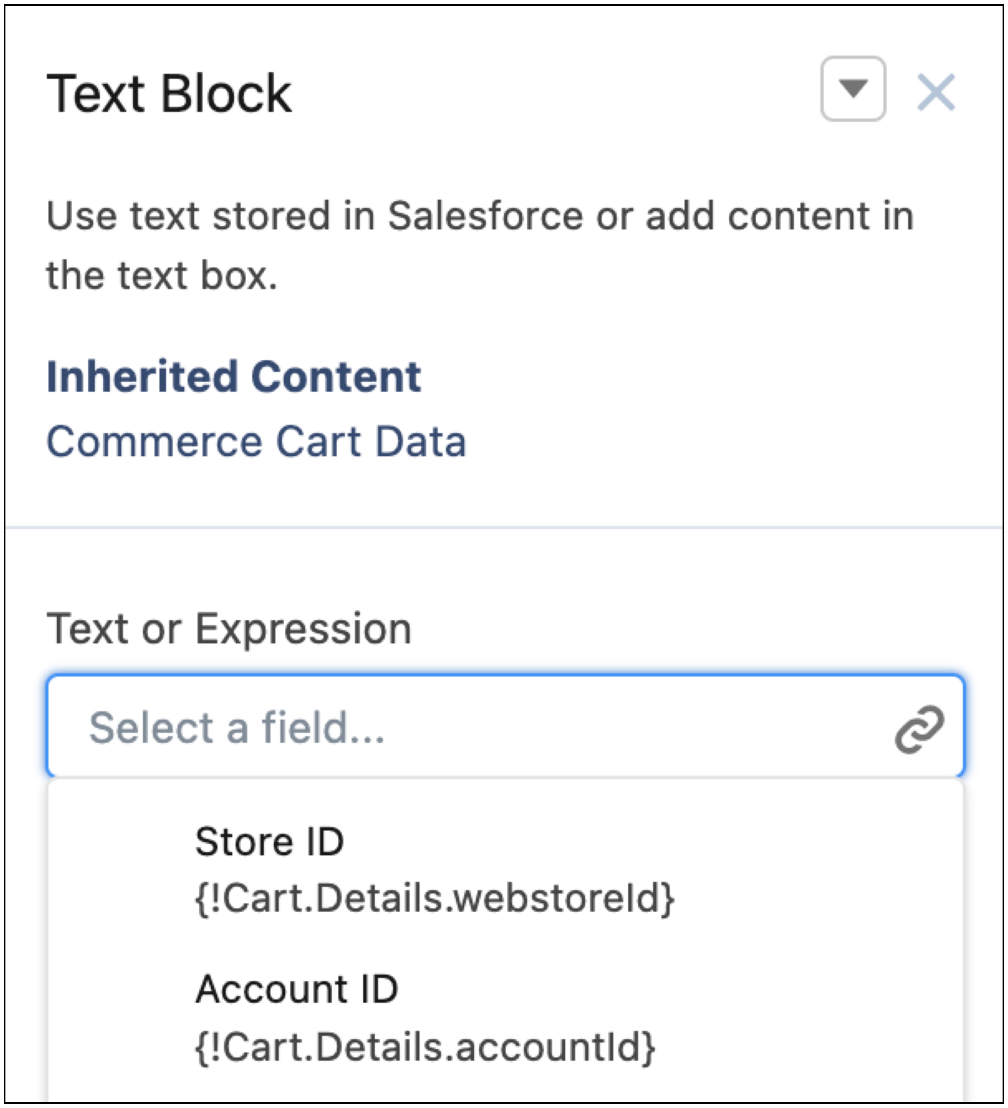
Other places where data providers are available include:

- Record Detail page—Access record data for supported objects through expressions, such as {!Item.recordField}. See All Supported Objects.
- Any page—Access CMS content through the Banner, Card, Overlap, and Tile components. See Use Expressions in LWR Sites.

Built-In Expressions

If a component includes built-in expressions, the Inherited Content field specifies which data is available. The component also includes a field where you can enter text or select an available expression.

For example, in this text block on a Cart page, the inherited content is Commerce Cart Data.



Text Block

Use text stored in Salesforce or add content in the text box.

Inherited Content

Commerce Cart Data

Text or Expression

Select a field...

Store ID

{!Cart.Details.webstoreId}

Account ID

{!Cart.Details.accountId}

The available expressions shown pull in the store ID and the account ID associated with the cart.

The components with properties that indicate the presence of a data provider are: Banner, Button, Card, Grid, HTML Editor, Image, Overlap, Rich Content Editor, Text Block, Tile, and Video.

Example:

- Show an offer that's based on whether the unit price is more than $100.

  `{!Product.Pricing.unitPrice > 100}`—Returns true or false depending on whether the unit price is larger than 100.

- Create an offer based on whether the list price is less than the unit price.

`{!Product.Pricing.listPrice < Product.Pricing.unitPrice}`—Returns true or false depending on whether the list price is smaller than the unit price.

- Show special deals based on a product's brand.

  `{!Product.Details.fields.Name == 'someName'}`—Returns true when the product name equals 'someName'.

- Highlight customer savings.

  `{!+Order.totalAmount - (+Order.adjustmentAggregates.totalProductPromotionDistAmount)}`—Returns the difference between the total amount and the promotion distribution amount.

- Show a product count next to the heading in the Cart Summary component.

  `Summary ({!Cart.Details.totalProductCount})`—Returns "Summary (X)," where X is the number of products in the cart.

Control When a Commerce Component Is Visible

Create dynamic visibility rules to control when a component is visible on the storefront. Use Expression-Based Visibility (EBV) to show and hide storefront components based on ecommerce data-driven conditional expressions.

For more information see Expressions-Based Visibility in Enhanced LWR Sites.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Create Multiple Versions of a Commerce Component

Create multiple versions of a component, and assign visibility rules to target specific customer groups with each variation. Use Component Variations to tailor the shopping experience for different customers.

For more information see Create Component Variations in LWR Sites.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Component Variations in Enhanced LWR Sites

Data Expressions for Commerce Cart Components

Use these data expressions in any component on the cart page.

Data	Expression	Description
Account ID	{!Cart.Details.accountId}	ID of the cart account.
Cart ID	{!Cart.Details.cartId}	ID of the cart.
Cart Items	{!Cart.Items}	Collection of cart item results.
Cart Name	{!Cart.Details.name}	Name of the cart.
Cart Status	{!Cart.Details.status}	Status of the cart. Values are: • Active • Checkout • Closed • PendingDelete • Processing
Cart Type	{!Cart.Details.type}	Type of cart. Value is Cart.
Charges	{!Cart.Totals.chargeAmount}	Total amount for shipping and other charges in the currency of the cart.
Contains Subscriptions	{!Cart.Details.containsSubscription}	Cart contains items with subscriptions.
Currency ISO Code	{!Cart.Details.currencyIsoCode}	Three-letter ISO 4217 currency code associated with the cart.
Grand Total	{!Cart.Totals.grandTotal}	Grand total amount, including shipping and tax, for items in the cart, in the currency of the cart.
Original Total	{!Cart.Totals.listPrice}	Total list price for the cart.
Product Count	{!Cart.Details.totalProductCount}	Total count of items in the cart.
Promotions Total	{!Cart.Totals.promotionalAdjustmentAmount}	Total amount of promotion adjustments.
Store ID	{!Cart.Details.webstoreid}	ID of the cart's web store.
Subscription Product Count	{!Cart.Details.totalSubscriptionProductCount}	Number of cart items that contain subscriptions.
Subtotal	{!Cart.Totals.productAmount}	Total amount, including discounts, but excluding shipping and tax, for product items in the cart.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Data	Expression	Description
Subtotal With Promotions	{!Cart.Totals.productAmountAfterAdjustments}	Total product amount, including promotions.
Tax Total	{!Cart.Totals.taxAmount}	Total tax amount for the cart, including tax on shipping, if applicable.
Tax Type	{!Cart.Details.taxType}	Tax type of the cart. Values are: • Gross • Net
Unique Product Count	{!Cart.Details.uniqueProductCount}	Total count of unique items, or SKUs, in the cart.

Data Expressions for Commerce Order Components

Use these data expressions in any component on the order summary details page.

- {!Order.Details.orderSummaryId}
- {!Order.Details.status}
- {!Order.Details.orderNumber}
- {!Order.Details.orderedDate}
- {!Order.Details.createdDate}
- {!Order.Details.totalAmount}
- {!Order.Details.ownerId}
- {!Order.Details.currencyIsoCode} {!Order.Details.AccountId.text}
- {!Order.Details.ActiveProcessExceptionCount.text}
- {!Order.Details.fields.BillingStreet.text}
- {!Order.Details.fields.BillingAddress.text}
- {!Order.Details.fields.BillingEmailAddress.text}
- {!Order.Details.fields.BillingPhoneNumber.text}
- {!Order.Details.fields.BusinessModel.text}
- {!Order.Details.fields.ChangeOrderId.text}
- {!Order.Details.fields.BillingCity.text}
- {!Order.Details.fields.CloneSourceId.text}
- {!Order.Details.fields.BillToContactId.text}
- {!Order.Details.fields.BillingCountry.text}
- {!Order.Details.fields.CreatedById.text}
- {!Order.Details.fields.CreatedDate.text}
- {!Order.Details.fields.CurrencyIsoCode.text}
- {!Order.Details.fields.Description.text}
- {!Order.Details.fields.ExternalReferenceIdentifier.text}
- {!Order.Details.fields.TotalFeeAmount.text}

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- {!Order.Details.fields.TotalFeeTaxAmount.text}
- {!Order.Details.fields.TotalFeeAmountWithTax.text}
- {!Order.Details.fields.TotalAdjustedFeeAmount.text}
- {!Order.Details.fields.TotalAdjustedFeeTaxAmount.text}
- {!Order.Details.fields.BillingGeocodeAccuracy.text}
- {!Order.Details.fields.LastModifiedById.text}
- {!Order.Details.fieldslastModifiedDate.text}
- {!Order.Details.fieldsLastReferencedDate.text}
- {!Order.Details.fields.LastViewedDate.text}
- {!Order.Details.fields.BillingLattitude.text}
- {!Order.Details.fields.BillingLongitutde.text}
- {!Order.Details.fields.TotalAdjDistAmount.text}
- {!Order.Details.fields.TotalAdjDistTaxAmount.text}
- {!Order.Details.fields.TotalAdjDistAmountWithTax.text}
- {!Order.Details.fields.TotalFeeAdjDistAmount.text}
- {!Order.Details.fields.TotalFeeAdjDistTaxAmount.text}
- {!Order.Details.fields.TotalFeeAdjDistAmtWithTax.text}
- {!Order.Details.fields.OrderLifeCycleType.text}

Data Expressions for Commerce Product Components

Use these data expressions in any component on the product page.

Expression	Description
{!Product.Details.id}	ID of the product.
{!Product.Details.fields.isActive}	Indicates whether the product is active or not.
{!Product.Details.fields.isArchived}	Indicates whether the product is archived.
{!Product.Details.fields.CreatedById}	ID of the user who created the product.
{!Product.Details.fields.CreatedDate}	Date the product was created.
{!Product.Details.fields.CurrencyIsoCode}	Three-letter ISO 4217 currency code associated with the product.
{!Product.Details.fields.IsDeleted}	Indicates whether the object has been moved to the Recycle Bin or not.
{!Product.Details.fields.DisplayUrl}	Display URL of the product.
{!Product.Details.fields.ExternalDataSourceId}	External data source ID of the product.
{!Product.Details.fields.ExternalId}	External ID of the product.
{!Product.Details.fields.LastModifiedById}	ID of the user who last modified the product.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Expression	Description
{!Product.Details.fields.LastModifiedDate}	Timestamp for when the current user last modified the product.
{!Product.Details.fields.LastReferencedDate}	Timestamp for when the current user last viewed a record related to the product.
{!Product.Details.fields.LastViewedDate}	Timestamp for when the current user last viewed the product.
{!Product.Details.fields.ProductClass}	Product class of the product.
{!Product.Details.fields.ProductCode}	Product code of the product.
{!Product.Details.fields.Description}	Description of the product.
{!Product.Details.fields.Family}	Family of the product.
{!Product.Details.fields.id}	ID of the product.
{!Product.Details.fields.Name}	Name of the product.
{!Product.Details.fields.StockKeepingUnit}	Stock keeping unit of the product.
{!Product.Details.fields.Type}	The type of the product. Values are: • Base • Null Values are: Base Null
{!Product.Details.fields.QuantityUnitOfMeasure}	Unit of the product, for example, kilograms, liters, or cases.
{!Product.Details.fields.SystemModstamp}	ISO 8601 date string indicating when a user or any automated system process, such as a trigger, updated the file.
{!Product.Details.fields.TaxPolicyId}	ID of the related tax policy.
{!Product.Details.defaultImage.canViewPrice}	Specifies whether the product's price can be viewed (true) or not (false).
{!Product.Details.defaultImage.id}	ID of the default image for the product.
{!Product.Details.defaultImage.url}	URL for the default image for the product.
{!Product.Details.defaultImage.thumbnailUrl}	URL of the thumbnail for product media.
{!Product.Details.defaultImage.title}	Title of the product media.
{!Product.Details.defaultImage.alternateText}	Alternative text for the product media.
{!Product.Details.defaultImage.sortOrder}	Sort order of a media item within a media group.
{!Product.Details.defaultImage.mediaType}	Type of product media. Values are: • Document • Image • Video

Expression	Description
{!Product.Details.defaultImage.contentVersionId}	ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is null.
{!Product.Details.variationParentId}	ID of the variation parent.
{!Product.Details.productClass}	Class of the product. Values are: • Simple • Variation • VariationParent
{!Product.Details.variationAttributeSet.id}	Variation attribute set for the product.
{!Product.Details.variationAttributeSet.developerName}	Unique name of the object in the API.
{!Product.Details.purchaseQuantityRule.minimum}	Minimum quantity of a product that can be purchased.
{!Product.Details.purchaseQuantityRule.maximum}	Maximum quantity of a product that can be purchased.
{!Product.Details.purchaseQuantityRule.increment}	Increment value of the quantity that can be purchased.
{!Product.Pricing.pricebookEntryId}	ID of the price book entry for the product.
{!Product.Pricing.listPrice}	List price for the product.
{!Product.Pricing.unitPrice}	Unit price for the product.
{!Product.Pricing.currencyIsoCode}	Three-letter ISO 4217 currency code associated with the product.
{!Product.Pricing.priceAdjustment.id}	Price adjustment schedule for the product.
{!Product.Tax.taxLocaleType}	Tax type of the store. Values are: • Gross–Prices include tax • Net–Prices don't include tax
{!Product.SelectedVariant.isValid}	Indicates if the selected variant is a valid product or not.
{!Product.SelectedVariant.options}	Provides options of the selected variant.

Data Expressions for Commerce Search Components

Use these expressions in any component on the Search page.

Data	Expression	Description
Product Cards	{!Search.Results.cardCollection}	The collection of data displayed in a product card in search results.
Filters	{!Search.Results.filtersPanel}	The data displayed in the filters panel.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Data	Expression	Description
Locale	{!Search.Results.locale}	Locale of the search results.
Page Size	{!Search.Results.pageSize}	Number of products per page in the search result.
Total	{!Search.Results.total}	Number of products in the search result across all pages.
Category Name	{!Search.Results.categoryName}	The selected category name.
Description	{!Search.Results.description}	The search and category header title based on results data.
Sort Rules	{!Search.SortRules.rules}	The list of available sort rules.
Current Sort Rule	{!Search.SortRules.currentSortRuleId}	The selected sort rule.
Total Pages	{!Search.Pagination.totalPages}	The number of pages in the search result.
Current Page	{!Search.Pagination.currentPage}	The current page number in the search result.
Start Index	{!Search.Pagination.startIndex}	The starting index of items displayed in the list.
End Index	{!Search.Pagination.endIndex}	The last index of items displaying in the list.

Publication and Activation

When you've previewed your pages and are ready to start selling, it's time to make your store available to your customers. First, configure a custom domain and CDN. Assign the store a custom URL. Then publish the store and activate it.

Configure a Custom Domain and CDN

For production B2B and D2C stores created with the LWR template, we recommend enabling the Salesforce CDN, which uses Cloudflare as the CDN partner. You can either set up a custom domain to point to the CDN or use the URL provided by Salesforce. We recommend using a custom domain if you prefer a branded URL or a URL that doesn't contain my.site.com. If you plan to disable the Salesforce CDN for your org, a custom domain is required. Alternatively, if you want to use the system-managed *.my.site.com URL provided by Salesforce, you don't have to create a custom domain. Pre-production B2B LWR and D2C LWR stores don't initially need a custom domain. However, we highly recommend configuring a custom domain for your LWR stores before launching them into live production. For other types of stores, your custom domain can use the Salesforce CDN, with Akamai as the CDN partner. You can use a single custom domain for multiple Commerce stores. A Salesforce admin typically configures the custom domain.

Use a Custom URL for Your Store

The default URL for a Commerce store includes a temporary path you specified when creating the store. The default URL is suitable for testing pre-production stores during development. However, before you launch a B2B or D2C store created with an LWR template into live production, we recommend that you configure a custom URL for the store. Associate the custom URL with a custom domain served by the Salesforce CDN, with Cloudflare as the CDN partner. For B2B stores created with an Aura template, a custom URL is optional. However, we recommend using a custom domain and corresponding CDN if broad access and high security are required.

Publish Your Store

As you work on your B2B or D2C store, you can preview what it looks like to customers. When you're ready to make it public, you publish the store and then activate it. You also republish your store whenever you make changes.

Activate Your Store

Activating your B2B or D2C store makes it available to customers and accessible to external services and online search engines. Activating the store also publishes it.

Deactivate Your Store

Deactivating your store makes it inaccessible to customers. Deactivate only when you want to temporarily or permanently bring down the store.

Disable the Welcome Email for Your Store

When you activate your store, all members of the site receive a welcome email. You can turn off this feature before you activate so that the email isn't sent.

Configure a Custom Domain and CDN

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

For production B2B and D2C stores created with the LWR template, we recommend enabling the Salesforce CDN, which uses Cloudflare as the CDN partner. You can either set up a custom domain to point to the CDN or use the URL provided by Salesforce. We recommend using a custom domain if you prefer a branded URL or a URL that doesn't contain my.site.com. If you plan to disable the Salesforce CDN for your org, a custom domain is required. Alternatively, if you want to use the system-managed *.my.site.com URL provided by Salesforce, you don't have to create a custom domain. Pre-production B2B LWR and D2C LWR stores don't initially need a custom domain. However, we highly recommend configuring a custom domain for your LWR stores before launching them into live production. For other types of stores, your custom domain can use the Salesforce CDN, with Akamai as the CDN partner. You can use a single custom domain for multiple Commerce stores. A Salesforce admin typically configures the custom domain.

To serve your custom domain with the Salesforce CDN, your domain name must be 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 registered and hosted externally from Salesforce. You can't use the same domain name across multiple organizations. If you delete a domain name from one organization and plan on reusing it in another, wait at least 48 hours between deleting the domain name and adding it back in.

Note: A CDN isn't required for sandbox stores, stores created in Developer Edition, or B2B stores created with an Aura template. Although a custom domain and corresponding CDN are optional for a B2B store created with an Aura template, we recommend them if broad access and high security are required.

1. Review the considerations for the Salesforce CDN.
2. Complete the prerequistes for a custom domain and the prerequistes for the Salesforce CDN.
3. Set up a custom domain that uses the Salesforce CDN, with Cloudflare as the CDN partner.

   During setup, to choose Cloudflare as the CDN partner, select the **Serve the domain with the Salesforce Content Delivery Network (CDN)** option, and select the **Use the Salesforce CDN for Commerce LWR sites or sites hosted on Experience Delivery** checkbox.

SEE ALSO:

Use a Custom URL for Your Store

Activate Your Store

Use a Custom URL for Your Store

The default URL for a Commerce store includes a temporary path you specified when creating the store. The default URL is suitable for testing pre-production stores during development. However, before you launch a B2B or D2C store created with an LWR template into live production, we recommend that you configure a custom URL for the store. Associate the custom URL with a custom domain served by the Salesforce CDN, with Cloudflare as the CDN partner. For B2B stores created with an Aura template, a custom URL is optional. However, we recommend using a custom domain and corresponding CDN if broad access and high security are required.

This task assumes that a Salesforce admin has already configured a custom domain that uses the Salesforce CDN. See Configure a Custom Domain and CDN.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter `Custom URLs`, and select **Custom URLs**.
3. Click **New Custom URL**.
4. For Domain, search for and select the custom domain.
5. For Site, search for and select your store.
6. For Path, enter the path to append to the custom domain to access your store.
7. Click **Save**.

> Note: The URL for your store is a combination of the custom domain name and path. For example, if your custom domain is mydomain and you enter `vintagejewelry` for the path, the URL to your store is `www.mydomain.com/vintagejewelry`.

SEE ALSO:

Publication and Activation

Configure a Custom Domain and CDN

Publish Your Store

As you work on your B2B or D2C store, you can preview what it looks like to customers. When you're ready to make it public, you publish the store and then activate it. You also republish your store whenever you make changes.

> Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Website Design**.
3. Click **Publish** in the Website Design workspace. You can also go to Experience Builder to preview the store before publishing.
   a. Click **Experience Builder**.
   b. In Experience Builder, to see how the store looks, click **Preview** on any page.

For more information, see Preview Your Experience Builder Site.

c. When you like the way your store looks, click **Publish**.

Your store isn't available to buyers or shoppers until you activate it. After you activate your store, republish it whenever you make changes.

You get an email notification when your store is published.

SEE ALSO:

Publication and Activation

Activate Your Store

Activating your B2B or D2C store makes it available to customers and accessible to external services and online search engines. Activating the store also publishes it.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

Before you go live to customers, configure a custom domain and CDN to optimize security, scalability, and performance. See Configure a Custom Domain and CDN and Use a Custom URL for Your Store. Use the Digital Experiences app to change the domain for the public channel associated with the store's CMS workspace. Make the domain match the domain that you configure for your store. See Configure the Salesforce CDN for Salesforce CMS.

1. (Optional) When you activate your store, registered customers receive a welcome email. If you want, disable the welcome email before activating.

   See Disable the Welcome Email for Your Store.

2. In the navigation sidebar, select a store from the **Store** dropdown.
3. Select **Settings** > **Store**, and then click **Store Activation**.
4. Click **Activate**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

Disable the Welcome Email for Your Store

Deactivate Your Store

Publication and Activation

Configure a Custom Domain and CDN

Use a Custom URL for Your Store

Configure Store Language, Currency, and Tax

Deactivate Your Store

Deactivating your store makes it inaccessible to customers. Deactivate only when you want to temporarily or permanently bring down the store.

Important: These steps apply to the refreshed Commerce app introduced in Summer '24. We encourage you to use the refreshed app. If you're still using the previous app, now called the Commerce Storefront Console, see B2B and D2C Commerce Using the Commerce Storefront Console. To switch to the refreshed app, see Enable the Refreshed Commerce App.

1. In the navigation sidebar, select a store from the **Store** dropdown.
2. Select **Settings** > **Store**, and then click **Store Activation**.
3. Click **Deactivate**.

SEE ALSO:

Activate Your Store

Publication and Activation

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce or D2C Commerce

Disable the Welcome Email for Your Store

When you activate your store, all members of the site receive a welcome email. You can turn off this feature before you activate so that the email isn't sent.

1. Click ⚙ at the top of the page, and then select **Setup**.
2. In the Quick Find box, enter **Digital Experiences** and select **All Sites**.
3. For your store, click **Workspaces**.
4. Click the Administration tile.
5. Click **Emails**.
6. Deselect **Send welcome email**.
7. Save your changes.

SEE ALSO:

Publication and Activation

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

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