Salesforce Order Management Implementation Guide

Salesforce, Summer '22

CONTENTS

SALESFORCE ORDER MANAGEMENT IMPLEMENTATION

This guide outlines the necessary steps for Salesforce Administrators to understand, set up, and use Salesforce Order Management. Follow the steps in the order they appear. If you're updating Order Management from the previous version, review the updated instructions, then see Update Salesforce Order Management from the Previous Version.

Order Management Concepts
Familiarize yourself with some basic Order Management concepts to help you plan your implementation.

Objects and Records in Order Management
Salesforce Order Management introduces several new objects, used together with existing objects, to represent data in the order workflow.

Set Up Salesforce Order Management on Your Org
To prepare your org and set up Salesforce Order Management, follow these steps in order. You must complete them before you can start working with Order Management.

Configure Order Management Users and Permissions
After setting up your org, learn about Order Management personas and permission sets, and configure your users.

Get Order Management Ready to Go Live
There are a few more steps to take before launching Salesforce Order Management into production.

Update Salesforce Order Management from the Previous Version
To update an existing Salesforce Order Management implementation to Summer '22, follow these instructions along with the setup steps.

Order Management Concepts

Familiarize yourself with some basic Order Management concepts to help you plan your implementation.

Salesforce Order Management helps retailers fulfill, manage, and service orders at scale. We've built it from the ground up to support a powerful workflow with real-time inventory, payment and invoicing, and order allocation and fulfillment features. Plus, we designed it to integrate seamlessly with Salesforce B2C Commerce, B2B Commerce, and Service Cloud out of the box. This unified platform provides holistic access to shopper data such as order and case histories, and it breaks down the functional silos that traditionally hampered the shopper experience.

> 📝 **Note:** In this guide, "B2C Commerce" refers to Salesforce B2C Commerce.

Salesforce Order Management provides you with tools to manage the orders received from your storefront, including specialized objects, actions and APIs, platform events, and Lightning components. You can use them together with Salesforce Flow, a powerful automation system for implementing business processes on the Salesforce platform, to build customized order management applications. In addition, the Order Management Lightning console app provides default functionality in the Salesforce UI.

To get you started, we provide a collection of sample fulfillment packages. They include flows, processes, and Apex classes that show how to implement Order Management functionality with Salesforce Flow.

Example Order Workflow

You can configure and customize an order management workflow that's right for your business. Here's an example of how the order lifecycle can be managed in Salesforce Order Management for orders placed on a B2C Commerce storefront:

1. The storefront receives an order and sends it to Salesforce Order Management.

2. The integration transforms the order data and inserts it into a set of Salesforce records.

3. The B2C Commerce customer profile is matched with a customer account in Salesforce.

4. Order Management searches for each ordered product in Salesforce using the product SKU. If it doesn't find a matching product record, it creates one.

5. Order Management creates summary records for the order and its related records.

6. A custom integration with a third-party provider performs a fraud check.

7. A custom flow uses allocation logic to create fulfillment orders and fulfillment order products for the order products. It then assigns them to fulfillment locations based on their order delivery groups, inventory, and other criteria.

8. The system updates quantities on the associated summary records and exports the fulfillment orders to a fulfillment provider.

9. The external provider returns an Advance Shipping Notice (ASN) to Order Management.

10. Depending on the data in the ASN, Order Management either creates shipment records and changes the fulfillment order statuses to Fulfilled, or changes the fulfillment order statuses to Cancelled.

11. The status change to Fulfilled triggers a process that creates invoices and places calls to the payment provider to ensure funds.

12. The system updates quantities and statuses on the associated summary records and exports the invoices to an ERP.

Objects and Records in Order Management

Salesforce Order Management introduces several new objects, used together with existing objects, to represent data in the order workflow.

Order Records

The process for creating records in Order Management depends on your storefront. For example, if you use Salesforce B2C Commerce, the B2C Commerce Integration imports order data into Order Management. For information on handling order data from a different storefront, see Importing Order Data in the *Order Management Developer Guide*.

Items and Products

The terms "item" and "product" are used interchangeably throughout Order Management. Usually, technical areas like APIs and flow actions use "item," while the user interface uses "product." However, there are some exceptions.

Summary Objects and Change Objects

Summary objects provide a dynamic view of current order data. Typically, users interact with summary records instead of the underlying records. For example, a service agent looking up information for a customer would search for the order summary, not the original order.

Why summary objects? They help the system maintain a record of data changes. Consider a customer who cancels a product from an order. Instead of modifying the original order record, Order Management creates a new order record that stores the changes, referred to as a change order. An order summary record maintains relationships with the original order and any change orders that apply to it.

Initially, the data in the order summary matches the values in the original order. For each change that has a financial impact, the system creates a change order and updates the order summary. The values in the summary are equal to the sums of the corresponding values in the original order and all subsequent change orders.

Only substantive modifications that affect charges and payments, such as canceling a product from an order, create change order records. Expected updates related to an object's workflow, such as a change to an order's status, don't have change records. To maintain records of those updates, store the information separately.

To interact with an order, access the order summary. To examine the order history, retrieve the original order and any subsequent change orders. Other records related to an order, such as fulfillment orders, order payment summaries, and order product summaries, are associated with the order summary. Data from these records shows on the Order Summary page, and you can access the corresponding records from quick links and related lists.

Similarly, order product summaries provide a dynamic view of the products in an order that originate as order product records. However, order product changes include information not stored in order product records, such as the type of change and the reason. Order Management represents a product change with an order product summary change object in addition to the order product object.

Order product summaries include multiple quantity fields that track detailed information about the order lifecycle, such as allocated quantity and returned quantity. You don't update these quantities directly. Instead, actions that affect quantities automatically recalculate them.

Action	Quantities Increased	Quantities Decreased
Cancel order products	Canceled	Total quantity, net ordered, available to fulfill or cancel
Return order products	Returned, return initiated	Total quantity, available to return
Change fulfillment order status category to Activated	Allocated	Available to fulfill or cancel
Change fulfillment order status category to Closed	Fulfilled, available to return	Allocated
Cancel fulfillment order product	Available to fulfill or cancel	Allocated

Unlike other summary objects, an order payment summary doesn't represent an original record and changes to it. Instead, it represents a set of payment records that use the same payment method and are associated with an order summary. An order payment summary makes it easy to understand and work with an order's balances across multiple payments, including authorization, capture, and refund amounts.

Adjustment Objects

Adjustment objects represent discounts applied to an order or order product. Adjustment summary objects provide a dynamic view of adjustments. For example, consider multiple discounts that apply to a single order product. Each discount has a corresponding order product adjustment line item record, and an order product adjustment line item summary represents the sum of those discounts.

Order Management represents an adjustment to multiple order products, or to an entire order, with an order adjustment group that associates the related adjustments. For example, consider a 10% discount applied to an entire order. A 10% discount order product adjustment is created for each product in the order, and the individual adjustments are associated with an order adjustment group.

Adjustment objects represent purely financial changes, not other changes that affect payments, such as returns and cancellations. The change orders representing those changes include financial information, so adjustment objects aren't needed.

> **Note:** An adjustment can also represent a fee added to an order or order product, but that isn't common.

Platform Events for Order Management Objects

Order Management includes platform events that provide order-related notifications. You can use them along with custom events and other methods to initiate your processes and flows:

- Fulfillment Order Item Quantity Changed Event (FulfillOrdItemQtyChgEvent)—The quantity of a fulfillment order product has changed.
- Fulfillment Order Status Changed Event (FOStatusChangedEvent)—The status of a fulfillment order has changed.
- Order Summary Created Event (OrderSummaryCreatedEvent)—An order summary has been created.
- Order Summary Status Changed Event (OrderSumStatusChangedEvent)—The status of an order summary has changed.
- Process Exception Event (ProcessExceptionEvent)—A problem has occurred that warrants a process exception. This event triggers the default Create Process Exception flow.

Shopper Representation

In Salesforce, accounts represent business entities and contacts represent individuals associated with accounts. To represent a shopper in commerce transactions, you need elements of both objects. Order Management can represent shoppers in two ways:

- Standard Accounts and Contacts—A standard account and a contact together hold a shopper's data. The account and contact function as separate records.
- Person Accounts and Contacts—A person account and a contact together hold a shopper's data. A person account is a special Account record type that includes data normally found in contacts. When working with a person account, you can't work directly with the contact in the Salesforce UI. Instead, you access contact data via special fields that only exist on person accounts. Person accounts let you work with a single record instead of a separate account and contact for each individual shopper.

> **Note:** Before Order Management can use person accounts, you must enable them in your org. The Order Management implementation instructions describe the process.

Enabling person accounts in your org creates two default record types for the Account object: business account and person account. A business account is identical to a standard account. For an org with person accounts enabled, treat any reference to "standard account" in the documentation as a reference to "business account."

Order Management always represents business buyers with standard accounts and contacts. By default, it also represents individual shoppers with standard accounts and contacts. To represent individual shoppers with person accounts instead, activate the Person Accounts for Shoppers admin setting according to the procedure in the *Salesforce Order Management Implementation Guide*.

If you enable person accounts on your org, you can't disable them. However, you can configure Order Management to use business accounts instead of person accounts for individuals by turning off the Person Accounts for Shoppers setting.

> **Note:** In Salesforce B2B2C Commerce, person accounts always represent shoppers. If you're using B2B2C Commerce, don't turn off the Person Accounts for Shoppers setting.

For detailed information on the storage and identification of shopper accounts, see Order Management Shopper Records in *Salesforce Order Management* in Salesforce Help.

Objects Used by Order Management

Order Management uses these object types to represent data in the order workflow. Some of them are standard Salesforce objects, and some are only available in orgs with an Order Management license.

Object	Requires Order Management License	Description
Account (Person Account)		When using Person Accounts, an account of the Person Account record type represents an individual shopper. When not using Person Accounts, a standard account and contact together represent an individual shopper. A business account buyer or shopper always has a standard account and a contact.
Card Payment Method	✔	A credit card or debit card.
Contact		When not using Person Accounts, a contact and standard account together represent an individual shopper. When using Person Accounts, contacts aren't used for individual shoppers. A business account buyer or shopper always has a contact and a standard account.
Credit Memo	✔	An amount to be refunded after an invoice has been generated. Associated with one or more change orders.
Credit Memo Line	✔	A portion of the amount of a credit memo. One credit memo line can represent the full amount of a credit memo.
Digital Wallet	✔	A digital payment method.
Fulfillment Order	✔	A fulfillment request or shipper's instruction that can be sent to a fulfillment location. Represents a group of products and delivery charges on a single order that have the same fulfillment location, delivery method, and recipient. They can be included in one shipment or split into multiple shipments. A fulfillment order is associated with one order summary.
Fulfillment Order Product	✔	A product or delivery charge associated with a fulfillment order. Associated with one order product summary.
Fulfillment Order Product Adjustment	✔	A price adjustment on a fulfillment order product, usually a discount. Associated with one order product adjustment summary.
Fulfillment Order Product Tax	✔	The tax on a fulfillment order product or fulfillment order product adjustment. Associated with an order product tax summary.
Invoice	✔	An amount to be paid. Associated with one fulfillment order.
Invoice Line	✔	A portion of the amount of an invoice. One invoice line can represent the full amount of an invoice.
Location	✔	A location that fulfills orders, such as a warehouse or retail store.
Location Group	✔	A group of inventory locations. You can define location groups according to the logic of your business needs. For example, a location group can represent the warehouses in a geographic region, or it can include the fulfillment centers associated with a particular online storefront.
Location Group Assignment	✔	Represents the relationship between a location and a location group that includes it. You can assign a location to multiple location groups, in which

Object	Requires Order Management License	Description
		case there's one location group assignment for each location group that it's assigned to.
Order		An original order or a change to an order, such as a return or cancellation. It's associated with one order summary, which represents the current state of an order. The values on order records don't usually change. In Order Management, you usually interact with order summaries instead of orders.
Order Adjustment Group	✔	Defines a related set of price adjustments to order products on one order. In Order Management, you usually interact with order adjustment group summaries instead of order adjustment groups.
Order Adjustment Group Summary	✔	Defines a related set of price adjustments on order product summaries belonging to one order summary. The integration with Salesforce B2C Commerce assigns an order adjustment group summary for each storefront promotion to the adjustments that belong to that promotion.
Order Delivery Group	✔	Defines a group of order products, belonging to one order, to be fulfilled using the same delivery method and delivered to the same recipient. In Order Management, you usually interact with order delivery group summaries instead of order delivery groups.
Order Delivery Group Summary	✔	Defines a group of order product summaries, belonging to one order summary, to be fulfilled using the same delivery method and delivered to the same recipient. An order delivery group summary is used to create one or more fulfillment orders.
Order Delivery Method	✔	Order Management uses an order delivery method record together with a product record to represent a delivery method. The product record is added to an order to represent a charge for that delivery method.
Order Payment Summary	✔	Represents one or more payments that use the same payment method and are associated with the same order summary. The order payment summary's values are the sums of the values of the included payments. Unlike most summary objects, there's no corresponding Order Payment object.
Order Product		An original product on an order. It can also represent a charge, such as a delivery charge. With an order product summary change, it can also represent a change to a product on an order, such as a return or cancellation. In Order Management, you usually interact with order product summaries instead of order products.
Order Product Adjustment	✔	An adjustment to the price of an order product, usually a discount. In Order Management, you usually interact with order product adjustment summaries instead of order product adjustments.
Order Product Adjustment Summary	✔	An adjustment to the price of an order product summary, usually a discount.
Order Product Summary	✔	The current state of a product in an order summary. It tracks status by quantity, so for example, it could show an ordered quantity of 3, canceled

Object	Requires Order Management License	Description
		quantity of 1, and fulfilled quantity of 2. Associated with an original order product and any order product summary changes that apply to it, such as returns or cancellations.
Order Product Summary Change	✔	Data related to a change to an order product summary, such as a return or cancellation. Associated with an order product summary and an order product.
Order Product Tax		The tax on an order product. In Order Management, you usually interact with order product tax summaries instead of order product taxes.
Order Product Tax Summary	✔	The current state of tax on an order product summary or order product adjustment summary. Multiple order product tax summaries can apply to one order product summary or order product adjustment summary.
Order Summary	✔	Represents the current properties and state of an order, including fulfillment information. Associated with one order that represents the original order. The order summary's values are the sums of the values in the original order and any subsequent orders representing changes such as returns or cancellations.
Order Summary Routing Schedule	✔	Represents an attempt to route an order summary to one or more inventory locations for fulfillment. You can use it to schedule future attempts and to record completed attempts.
Payment	✔	A single payment capture or sale.
Payment Authorization	✔	A single payment authorization.
Payment Gateway	✔	A connection to an external payment gateway.
Payment Gateway Log	✔	A record of information exchanged between the Salesforce payments platform and an external payment gateway. It can also store data from external payment entities.
Payment Gateway Provider	✔	Used internally by the payment gateway connection.
Payment Group	✔	A group of payment transactions that have been processed for an order.
Payment Line Invoice	✔	A payment allocated to or unallocated from an invoice.
Payment Method	✔	A payment method, such as credit card, cash, or digital wallet.
Person Account		An individual shopper account.
Price Book Entry		The price of a product in a price book. Salesforce Order Management doesn't use this object, but because order products require them, it creates dummy price book entry records. When you create products to represent delivery methods, you must also add dummy price book entry records.

Object	Requires Order Management License	Description
		✏️ **Note:** If the Optional Price Books feature is enabled, then Order Management doesn't create price book entry records, and delivery method products don't require them.
Process Exception	✔	Represents an unexpected problem with a business process, such as payment capture.
Product		A product that a merchant sells or has sold. A product is also used to represent delivery charges for one or more order delivery methods.
Refund	✔	A single refund transaction.
Refund Line	✔	A portion of a refund that has been applied to or unapplied from a payment. One refund line can represent the full amount of a refund.
Return Order	✔	The return of order products. Associated with one order summary.
Return Order Line Item	✔	A specific order product that is associated with a return order.
Return Order Item Adjustment	✔	A price adjustment on a return order line item.
Return Order Item Tax	✔	The tax on a return order line item or a return order item adjustment.
Sales Channel	✔	A source of orders, such as a web storefront, physical store, marketplace, or mobile app. If you use Salesforce B2C Commerce, we recommend creating a sales channel record for each Site in your B2C Commerce implementation.
Shipment	✔	A single package. Associated with one fulfillment order. ✏️ **Note:** The Shipment object is also available with Field Service. However, it's only associated with a fulfillment order in Order Management orgs.
Shipment Item	✔	A product included in a shipment. Associated with one fulfillment order product.
Web Store	Requires the B2B Commerce license	A source of orders, usually for B2B orders.

Customizing Order Management Objects

You can add custom fields to objects used by Order Management. When you do, Order Management users need permission to access them. As part of the implementation process, you create a permission set to assign to all Order Management users. You can use it to provide access to a custom field. For more information, see Configure Order Management Users and Permissions on page 19.

🛑 **Important:** If you define a custom field as required, your storefront order data must include a value for it. Failure to provide a required value causes the integration to fail.

If you're integrating with a Salesforce B2C Commerce storefront, the Order Management B2C Service user also needs permission set access to any custom fields. For more information, see Integrate Custom B2C Commerce Storefront Data on page 33.

> 📝 **Note:** If you're implementing a custom integration with a different storefront, you're responsible for providing your integration with access to any custom fields.

For information on adding custom fields to objects, see Custom Fields in *Extend Salesforce with Clicks, Not Code* in Salesforce Help.

Set Up Salesforce Order Management on Your Org

To prepare your org and set up Salesforce Order Management, follow these steps in order. You must complete them before you can start working with Order Management.

Setup Step 1: Prepare Your Org for Order Management

To prepare your Salesforce Order Management implementation, review these prerequisites and perform these initial steps.

Setup Step 2: Configure Delivery Methods for Order Management

Configure delivery methods in your Order Management org that correspond to the delivery methods in your storefront.

Setup Step 3: Request B2C Commerce Integration Enablement

If you're integrating Order Management with a Salesforce B2C Commerce storefront, open a case with Salesforce Customer Support to enable the integration.

Setup Step 4: Configure Field-Level Security for Order Management

Give the System Administrator profile permissions to specific fields on certain order-related objects. These permissions allow users to access Order Management functionality.

Setup Step 5: Set Up Standard Flows for Order Management

We designed Order Management to work with Salesforce Flow, which makes it easy for you to create manual and automated functions in your org. We provide some standard flows out of the box.

Setup Step 6: Configure Tax Display

Configure the display of prices and taxes in your org. For locales that use net taxation such as sales tax, prices and taxes are displayed separately. For locales that use gross taxation such as value-added tax (VAT), prices and taxes are combined.

Setup Step 1: Prepare Your Org for Order Management

To prepare your Salesforce Order Management implementation, review these prerequisites and perform these initial steps.

Prerequisites

First, prepare your org by completing these steps.

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

1. Enable Lightning Experience. Order Management isn't currently supported on Salesforce Classic or Mobile. (You can view record pages on Mobile, but can't use other Order Management features.)

2. Decide whether to represent individual shoppers with person accounts or with standard accounts and contacts. For information on enabling and working with person accounts, see Person Accounts in *Sales Cloud Basics* in Salesforce Help.

   > 📝 **Note:** If you're using B2B2C Commerce, you must use person accounts.

⚠️ **Warning:** Enabling person accounts is an irreversible process that changes the database structure of your org. Carefully consider the implications before deciding whether to use them.

3. If you decide to use person accounts, and they aren't already enabled in your org, enable them. To begin the process, log into Salesforce Help with your customer login, click **Contact Support**, and create a Support case. Allow five business days for Support to complete the case. After you verify that person accounts are enabled, do the following:

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

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

   c. Scroll to the Record Type Settings section, find Accounts, and click its **Edit** link.

   d. In the Selected Record Types section, move **--Master--** to the Available Record Types box, and move **Business Account** and **Person Account** to the Selected Record Types box.

   e. Set both the Default Record Type and the Business Account Default Record Type to **Business Account**.

   f. Set the Person Account Default Record Type to **Person Account**.

   g. Click **Save**.

   h. Perform further configuration of Person Accounts as described in the Person Accounts help topics.

4. If you want to use multiple currencies, enable and configure them for your Salesforce org as described in Manage Multiple Currencies in *Salesforce Help*.

5. Purchase and activate a Salesforce Order Management license.

   📝 **Note:** The license is automatically available on a developer org or when using a partner-approved Order Management template ID to create a trial org.

6. If you're integrating Order Management with a Salesforce B2C Commerce storefront, create an API client ID for your storefront. Support requires this ID when provisioning your integration.

   📝 **Note:** Create a dedicated client ID for the integration instead of sharing one with other functions. Troubleshooting issues and gathering metrics are much easier when you know which actions are associated with each client ID.

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

   b. Click **API Client**.

   c. Click **Add API Client**.

   d. Enter a descriptive name in the **Display Name** field.

   e. Click **Add**.

   f. Click **Add** again.

Enable Admin Settings

After you complete the prerequisite steps, enable certain Order and Order Management settings.

📝 **Note:** Changing a setting can take several minutes to take effect.

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

2. Select these options.

   • **Enable Orders**

   • **Enable Negative Quantity**

- **Enable Zero Quantity**
- **Enable Enhanced Commerce Orders**

> ✅ **Note:** Reduction orders can conflict with Order Management change orders, so don't select **Enable Reduction Orders**. If you use reduction orders elsewhere, we recommend that you create an order Record Type for Order Management orders. Use an Apex Trigger or Validation Rule to prevent it from being used for reduction orders. For information on creating and using record types, see Tailor Business Processes to Different Users in *Extend Salesforce with Clicks, not Code* in Salesforce Help.

3. Decide whether you want to enable the Optional Price Books feature. If so, select **Enable Optional Price Books for Orders**. If you're using B2B2C Commerce, you must turn on this feature.

> ✅ **Note:** For more information about this feature, see Enable Orders Without Price Books in *Sales Cloud Basics* in Salesforce Help.

4. Save the settings.

5. Log out of the org and log back in, or refresh the page.

6. From Setup, in the Quick Find box, enter `Order Management`, and then select **Order Management**.

7. Activate the Order Management toggle.

> ✅ **Note:** Order Management can take several minutes to activate. If you don't see the Order Management app in the App Launcher, wait a few minutes and refresh the page.

8. If you're integrating Order Management with a Salesforce B2C Commerce storefront, activate these toggles.
   - B2C Integration
   - B2C Commerce Connection

> ✅ **Note:** Activation of these toggles can take several minutes.

9. If you're using person accounts to represent individual shoppers, activate the Person Accounts for Shoppers toggle.

> ✅ **Note:** Activating or deactivating this setting can take up to an hour due to the way it's cached.

10. The Order Entry and Pricing API for Adding and Exchanging Items will be made available soon. If you're interested in implementing it now, reach out to your Salesforce account manager.

> ✅ **Note:** To use this feature, you must also configure exchanges.

Reporting

Order Management includes reporting features. For information on configuring and using them, see the Order Management Reports topic in Salesforce Help.

Setup Step 2: Configure Delivery Methods for Order Management

Configure delivery methods in your Order Management org that correspond to the delivery methods in your storefront.

Setting up delivery methods for Order Management is more involved than simply creating order delivery method records. Because Order Management represents delivery charges as products, you create an order delivery method record for each delivery method plus one or more product records.

> ✅ **Note:** You can create one product record for each delivery method or associate a product record with multiple delivery methods.

> 📝 **Note:** If your org supports multiple currencies, and the Optional Price Books feature isn't enabled, then each delivery method product requires a standard price book entry for each supported currency.

If you're using a Salesforce B2C Commerce storefront, configure delivery methods as described here. The integration automatically adds delivery charge products to orders based on the shipping data received from B2C Commerce. For other storefronts, implement your own process for adding delivery charges to orders.

The following steps only apply to the B2C Commerce storefront integration.

When you create an order delivery method, assign the matching product to it, and set the reference number to match the B2C Commerce delivery method ID. When the integration receives an order, for each included delivery method, it uses the ID to look up the order delivery method by reference number. Then it adds the assigned product to the order with a price equal to the delivery charge.

> 📝 **Note:** When you load data outside of the integration, including test data, ensure that the storefront delivery method ID and corresponding Salesforce delivery product reference number match.

> 📝 **Note:** If you set up a delivery method that isn't associated with your storefront, you don't have to assign it a reference number. However, if you do, assign it a reference number that doesn't conflict with any delivery method IDs in your storefront.

Follow these steps for each delivery method you want to support.

1. Create a product record. See Guidelines for Creating Products in *Sales Cloud Basics* in Salesforce Help.

   a. From the App Launcher, find and select **Products**.

   b. Click **New**.

   c. In the Product Name and Product Code fields, enter a descriptive name and product code. For example, `USPS Ground Shipping` and USPS_`Ground`.

   d. Optionally, in the Product Description field, enter a description.

   e. Select the **Active** checkbox.

   f. Click **Save**. If the Optional Price Books feature is enabled, skip to step 2 (create an order delivery method). Otherwise, continue these steps to create price book entries.

   g. On the new product page, select the **Related** tab.

   h. In the Price Books related list, click **Add Standard Price**.

      If your org has multicurrency enabled, add a standard price entry for each currency that you support.

   i. If your org has multicurrency enabled, select a currency from the dropdown.

   j. In the List Price field, enter `0`. If you leave this field empty, then attempting to use the delivery method causes errors.

   k. Select the **Active** checkbox.

   l. To add a standard price book entry for another currency, click **Save & New**, and then repeat the steps for the next currency. If you've created entries for all supported currencies, click **Save**.

2. Create an order delivery method corresponding to the delivery method.

   a. From the App Launcher, find and select **Order Delivery Methods**.

   b. Click **New**.

   c. In the Name field, enter a name.

   d. Optionally, in the Description field, enter a description.

   e. In the Reference Number field, enter the delivery method ID used in your storefront. This ID must match the value included in storefront order data.

Salesforce B2C Commerce uses the term "shipping method" instead of "delivery method." If you use B2C Commerce, the Reference Number value is the shipping method ID used in your storefront.

f. In the Product field, find and select the product that you created for the delivery method.

g. Select the **Is Active** checkbox.

h. Click **Save**.

Setup Step 3: Request B2C Commerce Integration Enablement

If you're integrating Order Management with a Salesforce B2C Commerce storefront, open a case with Salesforce Customer Support to enable the integration.

To expedite your case, provide the following information:

- Your 18-character Salesforce org ID.
- Your Salesforce org's login URL. To find your org's login URL, follow these steps.

    1. Log into Salesforce.

    2. Click your profile image in the upper right corner of the UI.

    3. Your org's login URL is displayed under your username.

- Whether your org uses Enhanced Domains for My Domain URLs routed through Salesforce Edge Network.

    📝 **Note:** Turning on Enhanced Domains changes your org URLs. If you turn them on later, notify Salesforce Support.

- Your B2C Commerce storefront URL.
- Your API client ID.
- The email address of your Salesforce admin.
- Login credentials for Salesforce Support to access your storefront.
- Login credentials for Salesforce Support to access your Salesforce org. See Grant Login Access in Salesforce Help.

For information on opening a case, see Create a Support Case in Salesforce Help.

📝 **Note:** You can't continue the implementation process until Salesforce Support completes the case.

🛑 **Important:** If the org ID or login URL ever changes, or if you run DBInit on your B2C Commerce storefront, open a Support case to reprovision the integration.

Setup Step 4: Configure Field-Level Security for Order Management

Give the System Administrator profile permissions to specific fields on certain order-related objects. These permissions allow users to access Order Management functionality.

1. If you're using person accounts to represent individual shoppers, verify that they're enabled and configured in your org.

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

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

4. Scroll to the Field-Level Security section. For each object in the following table, perform these steps:

    a. Click **View**.

    b. Click **Edit**.

c. For each field in the Read Access column of the table, select **Read Access**.

d. For each field in the Edit Access column of the table, select **Edit Access**.

e. Click **Save**.

f. Click **Back to Profile**.

Object	Read Access	Edit Access
Location		• Assigned Fulfillment Order Count • Fulfillment Order Capacity • Priority • Track Fulfillment Order Capacity
Order	• Order Amount • Total Adjusted Delivery Amount • Total Adjusted Delivery Tax • Total Adjusted Product Amount • Total Adjusted Product Tax • Total Delivery Distributed Adjustments • Total Delivery Distributed Adjustment Tax • Total Product Distributed Adjustments • Total Product Distributed Adjustment Tax • Total Tax • Total with Tax	• Billing Email Address • Billing Phone Number • Bill To Contact • Ordered Date • Order Name • Order Reference Number • Sales Channel • Tax Locale Type
Order Product	• Adjusted Product Subtotal • Adjusted Product Subtotal Tax • Distributed Order Adjustments • Distributed Order Adjustments Tax • Gross Unit Price • Total Adjustments • Total Adjustments Tax • Total Tax	• Line Number • Order Delivery Group
Shipment	N/A	• Expected Delivery Date • Fulfillment Order • Return Order • Shipping Provider • Status • Total Items Quantity

Object	Read Access	Edit Access
		• Tracking Number • Tracking URL
Shipment Item	N/A	• Expected Delivery Date • Quantity • Return Order Line Item • Shipment • Tracking Number • Tracking URL
Order Adjustment Group	N/A	Description
Order Delivery Group	N/A	Deliver to Address

Setup Step 5: Set Up Standard Flows for Order Management

We designed Order Management to work with Salesforce Flow, which makes it easy for you to create manual and automated functions in your org. We provide some standard flows out of the box.

Before working with flows, familiarize yourself with Salesforce Flow. See Salesforce Flow in *Automate Your Business Processes* in Salesforce Help.

Order Management includes some managed flow templates. You can't use the templates directly. Instead, follow these instructions to copy them. Configure your system to use the copies, which you can customize.

- Cancel Item Flow
- Create Order Summary Flow
- Create Process Exception Flow
- Discount Flow
- Even Exchange Flow (requires a Salesforce Order Management Growth license)
- Reship Order Flow (requires a Salesforce Order Management Growth license)
- Return Item Flow
- If using B2B Commerce:
    - Subflow - Activate Order Flow
    - B2B Checkout Flow
- If using Return Merchandise Authorizations (RMA):
    - RMA Create Credit Memo and Ensure Refunds Flow
    - RMA Return Items

    📝 Note: RMAs require a Salesforce Order Management Growth license.

The Cancel Item, Discount, Even Exchange, Reship Order, Return Item, B2B Checkout, and RMA Return Items flows are screen flows, which users can launch manually. The B2B Subflow - Activate Order flow is a subflow that's called by the B2B Checkout flow. The Create

Order Summary, Create Process Exception, and RMA Create Credit Memo and Ensure Refunds flows are autolaunched flows. They're launched by the system as follows:

Create Order Summary Flow

When an Order record is created or updated, and its `StatusCode` is `Activated`.

Create Process Exception Flow

When a Process Exception Event platform event is created.

RMA Create Credit Memo and Ensure Refunds Flow

When a Return Order record with lifecycle type Managed is updated and its `StatusCategory` is `Closed`.

Customize the Provided Flow Templates

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

2. For each flow template other than the B2B flows:

   a. Click **New Flow**.

   b. From the list of templates, select the template, and then click **Create**.

   c. Click **Save As**.

   d. In the Flow Label field, enter a unique name.

   e. Click **Save**.

   f. Click **Activate**.

3. If using even exchanges on an org that supports multiple currencies, customize that flow to set the CurrencyIsoCode value on pricebook entries:

   a. Open your even exchange flow.

   b. In the list of Create Records elements, select the Pricebook_Entry element.

   c. In the Set Field Values for the Price Book Entry section, click **Add Field**.

   d. In the Field box, enter `CurrencyIsoCode`.

   e. In the Value box, set this value to the currency ISO code of the order summary by entering
      `{!Get_Order_Summary.CurrencyIsoCode}`.

   f. Click **Done**.

   g. Click **Save**.

4. If using B2B Commerce, customize the B2B flows so they create managed order summaries:

   a. If you already have a customized Subflow - Activate Order flow, open it. Otherwise, click **New Flow**. In the list of templates, select **B2B Checkout Flow**, and then click **Create**.

   b. Double-click the Activate Order action.

   c. Change the Order Life Cycle Type field value to `{!managedOrder}`, and then click **Done**.

   d. If you're creating a new flow, click **Save As**. In the Flow Label field, enter a unique name.

   e. Click **Save**.

   f. Click **Activate**.

   g. If you already have a customized B2B Checkout flow, open it. Otherwise, click **New Flow**. In the list of templates, select **B2B Checkout Flow**, and then click **Create**.

h. Delete the Activate Order Subflow node, and then replace it with a new Subflow node. Select your customized subflow based on the Subflow - Activate Order template.

i. Enter a label and unique API name.

j. In the Input Value and Output Value fields, enter these values:

- cartId: *{!cartId}*
- checkoutSession: *{!mainCheckoutSession}*
- currentState: *{!mainCheckoutSession.State}*
- nextState: *Order Confirmation*

  > ✏️ **Note:** Enter this string exactly as it appears here. Don't use autocomplete.

- closecart: *{!shouldCloseCart}*

k. Click **Done**.

l. Connect the Main Decision Hub decision node to the new subflow. From the Outcome dropdown, select **Activate Order**.

m. Click **Done**.

n. Connect the subflow's output to the Loop assignment node.

o. If you're creating a new flow, click **Save As**. In the Flow Label field, enter a unique name.

p. Click **Save**.

q. Click **Activate**.

r. If your B2B Commerce org is active, you can check the flows by placing a test order. To verify that Order Management created a managed order summary for it, run this SOQL query:

```
SELECT OrderNumber, OrderLifeCycleType from OrderSummary order by OrderedDate desc
limit 5
```

5. By default, the Discount Item flow calls the Adjust Order Item Summary action with an `allocatedItemsChangeOrderType` value of `InFulfillment`. That creates a separate change order for order items that are in the process of being fulfilled. To use a different process, customize the flow to set a different value. For information on the available values, see Flow Core Action for Order Management: Adjust Order Item Summaries Submit in Salesforce Help.

> ✏️ **Note:** When calling the Adjust action or API resource, the default `allocatedItemsChangeOrderType` value is `Disallowed`.

6. If you plan to use unmanaged order summaries, customize the Create Order Summary flow logic to assign the order lifecycle type. The default flow always creates managed order summaries. For information about managed and unmanaged order lifecycle types, see Order Lifecycle Management in Salesforce Help.

7. If you use Salesforce Omnichannel Inventory, make these customizations:

- In the Even Exchange flow, set the `applyOCI` and `useLocationGroups` variables to `true`. Their default value is `false`.
- In the Reship Order flow, set the `applyOCI` variable to `true`. Its default value is `false`.

> ✏️ **Note:** For simplicity, the documentation uses the generic template names to refer to your copies. For example, when you see "Cancel Item flow" in Salesforce Help, it refers to the active flow in your org.

Flow Considerations

- Flows can't use localized labels. If you want to include localized screen or message text in a flow, create a copy of the flow with hard-coded text in the desired language.

- If you add a custom field to an object used in a flow, customize the flow to handle it.

    🛑 **Important:** A change order is an Order record. If you add a required custom field to the Order object, update the service flows to set that field when they create a change order. If a flow tries to create an order and doesn't set that field, it fails.

- A flow that uses Omnichannel Inventory actions must have a runtime API version of 52.0 or later. When possible, always use the latest API version in your flows.

Configure Reasons for Cancel, Discount, and Return

The Cancel Item, Discount, and Return Item flows require the user to select a reason for the action from a dropdown list. Some examples of reasons are *Wrong Item* or *Customer Changed Mind*. Define a list of reasons, and add them to the picklist values for the Reason field on the Order Product Summary Change object.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.

2. Select the **Order Product Summary Change** object.

3. Click **Fields & Relationships**.

4. Select **Reason**.

5. Add your reasons to the Reason Picklist Values.

6. Select a default value.

Return Merchandise Authorization (RMA) Configuration

RMA functionality is available in Order Management Growth implementations. To configure this feature, follow these steps:

1. Specify a Default Workflow User. Certain actions in the RMA flows run as this user.

    a. From Setup, in the Quick Find box, enter *Process Automation Settings*, and then select **Process Automation Settings**.

    b. In the Default Workflow User field, enter the name of a user with the System Administrator profile. You can click the search icon to open a user search window.

2. Add your return reasons to the Return Order Line Item object.

    📝 **Note:** All Reason for Return values on Return Order Line Item must have matching Reason values on Order Product Summary Change.

    a. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.

    b. Select **Return Order Line Item**.

    c. Select **Fields & Relationships**.

    d. Select **Reason for Return**.

    e. Add your return reasons to the Reason for Return Picklist Values.

    f. Select a default value.

    g. Verify that all of these entries are also in the Reason picklist on Order Product Summary Change.

Setup Step 6: Configure Tax Display

Configure the display of prices and taxes in your org. For locales that use net taxation such as sales tax, prices and taxes are displayed separately. For locales that use gross taxation such as value-added tax (VAT), prices and taxes are combined.

If you only do business in a locale that uses net taxation, then you don't have to do any extra configuration. If you only do business in a locale that uses gross taxation, configure your org's page layouts to display amounts that combine prices and taxes. If your org is enabled for multiple currencies, create a user profile for service agents in gross tax locales by cloning the standard user profile. Create page layouts that use gross tax fields instead of net tax fields, and assign them to the new profile.

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

2. For each object that displays prices, create a page layout that uses gross taxation fields that combine prices and tax amounts. See Create Page Layouts in *Extend Salesforce with Clicks, not Code* in Salesforce Help.

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

4. If your org is enabled for multiple currencies, clone the Standard User profile. Give the new profile a name that identifies it as applicable for users working with gross tax.

5. If you only do business in a locale that uses gross taxation, edit the Standard User profile. If your org is enabled for multiple currencies, edit the new profile.

6. Assign the gross taxation page layouts to the user profile.

7. Perform the following steps after creating at least one Order Summary record. If necessary, return to this step later in the implementation process.

8. In Salesforce Order Management, open any Order Summary record details page.

9. From the Setup menu on that page, select **Edit Page**.

10. Configure the Fields for Gross Tax Orders section of the Totals component.

11. Save and activate the page.

Configure Order Management Users and Permissions

After setting up your org, learn about Order Management personas and permission sets, and configure your users.

User Access

To access Salesforce Order Management features, users require either the System Administrator profile or both the Standard Platform User profile and the Salesforce Order Management feature permission set license. They also require access to the Order Management console app and to any customizations that you implement.

Order Management includes some persona-based permission sets that include the Order Management permission set license. You can use them as is, clone and customize them, or create one or more custom permission sets that include the license. To see the details of the included permission sets, go to Setup. In the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

> 🔧 Note: You can't modify standard permission sets. If you use the included permission sets as is, you must also create at least one custom permission set to provide access to the console app and any customizations. If you clone them, remember that the cloned permission sets count against your org's limits.

Permission Set	Description
Order Management Operations Manager	Ability to manage day-to-day Order Management processes. Limited ability to modify open fulfillment orders.
Order Management Agent	Standard Order Management user. Can only modify an open fulfillment order by advancing its status through the workflow.
Order Management Shopper	Limited access for a service user to allow an external system like a Salesforce B2C Commerce storefront to make self-service requests. Read-only access to fulfillment orders.

You can organize your permission sets in a few different ways:

- (Recommended) Use one or more permission sets to provide the Order Management permission set license and persona-based permissions, and one permission set for the console app and any customizations. You can use the included permission sets or create custom permission sets with the Order Management permission set license. Assign one Order Management permission set and the custom permission set to each Order Management user.

- Use multiple Order Management permission sets. You can clone the included permission sets or create custom permission sets with the Order Management permission set license. Add the console app permission and all custom permissions to each set. Assign one of the sets to each Order Management user.

- Use a single permission set for all Order Management users. You can clone one of the included permission sets or create a custom permission set with the Order Management permission set license. Add the console app permission and all custom permissions to the set.

  ⊘ **Important:** If you assign more than one permission set with the Order Management permission set license to a single user, that user consumes multiple Order Management licenses.

For more information, see Permission Sets and User Licenses in *Set Up and Maintain Your Salesforce Organization* in Salesforce Help.

Order Management Console App Access

To provide access to the console app, configure a permission set as explained here.

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

2. To create a permission set, click **New**. To add permissions to an existing set, select it.

3. If creating a permission set:

    a. Enter a unique label. We recommend `OM Console`.

    b. Leave the **Session Activation Required** checkbox unselected.

    c. To provide the Order Management license with this permission set, select it in the License dropdown list. Otherwise, leave **--None--** selected.

    d. Click **Save**.

4. In the Apps section, click **Assigned Apps**.

5. Click **Edit**.

6. In the Available Apps box, select **Order Management (standard__OMConsole)**, and then click **Add**.

7. Click **Save**.

8. Configure the permission set to access Account records by following these steps:

      a. Click **Permission Set Overview**.

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

      c. Select **Accounts**.

      d. Click **Edit**.

      e. If you're using person accounts to represent shoppers, in the Account: Record Type Assignments section, select all of the record types.

      f. If your org restricts sharing for Account records, in the Object Permissions section, select the **View All** checkbox.

> 📝 Note: To check whether sharing is restricted for account records, from Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**. For more information on sharing settings, see Sharing Settings in *Set Up and Maintain Your Salesforce Organization* in Salesforce Help.

      g. Save the changes.

9. If you want to provide console app access in multiple permission sets, repeat the process for each set.

Custom Field Permissions

When you add a custom field to an object for use in Order Management, Order Management users need access to it. Provide access by updating the object settings in your Order Management permission sets to allow Edit access to that field.

> 📝 Note: If you're integrating with a Salesforce B2C Commerce storefront, the Order Management B2C Service user also needs permission set access to custom fields. For more information, see Integrate Custom B2C Commerce Storefront Data on page 33.

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

2. Select the permission set that controls access for your Order Management users.

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

4. Select the object that has the custom field.

5. Click **Edit**.

6. In the Field Permissions section, select the **Edit Access** checkbox for the custom field.

7. Click **Save**.

8. To provide access to custom fields in multiple permission sets, repeat the process for each of them. Always include the Order Management B2C Service permission set.

User Accounts

Think about the users working in your org. Consider their functions and the permissions they need. After you plan your hierarchy of admin, standard, and service user types, define processes for creating users. Then identify your initial groups of users and set them up in your org.

Data Protection and Privacy

Data protection and privacy regulations can require you to mask or delete customers' personal data. However, many fields on Order Management objects that contain personal data are read-only during normal processing. Only users with the System Administrator profile or the Edit Activated Orders permission can modify them. When designing your data protection and privacy policies, be sure to account for this restriction.

> 📝 **Note:** The fields subject to this restriction are listed in Considerations for Deleting Order Management Records in the Order Management documentation.

For more information, see Data Protection and Privacy in Salesforce Help.

Get Order Management Ready to Go Live

There are a few more steps to take before launching Salesforce Order Management into production.

Configure Fulfillment

Configure Order Management objects to support your order fulfillment process.

Configure Payment Gateways and Methods for Order Management

Set up payment gateways and payment methods to process payment transactions for Order Management.

Make Your Service Flows Available on the Order Summary Record Page

You can give users easy access to your flows by adding them to the Actions & Recommendations component on the order summary FlexiPage.

Import Historical Order Data

After you start using Salesforce Order Management in production, you can import historical order data from your legacy system for reference purposes.

Configure Salesforce B2C Commerce Storefront Integration

Configure the integration of Salesforce Order Management with a Salesforce B2C Commerce storefront.

Configure Fulfillment

Configure Order Management objects to support your order fulfillment process.

> 📝 **Note:** For information on using fulfillment orders in Order Management, see Fulfillment Orders in the *Order Management Developer Guide*.

Configure Fulfillment Types

Order Management supports three general categories of order fulfillment types. Each category is associated with one or more specific fulfillment types. The type assigned to a fulfillment order denotes the fulfillment method used for the products in that fulfillment order.

While the type categories are fixed, you can customize the list of types as long as you associate each type category with at least one type. To customize fulfillment types, edit the picklist values for the Type field on the Fulfillment Order object.

Fulfillment Type Category	Default Fulfillment Types
Physical	• Warehouse • Retail Store • In Store Pickup
Drop Ship	• Supplier
Digital	• Download

Fulfillment Type Category	Default Fulfillment Types
	• Email

Configure Fulfillment Locations

First, define a set of fulfillment location types, such as Warehouse and Retail Store, and add them to the Location Type picklist on the Location object. Then, create a location record to represent each of your fulfillment locations.

Optionally, create a location ranking system for your routing logic. To do so, add values to the Location object's `Priority` field picklist and assign a value to each location. The default picklist is empty; you can add any values that fit your routing logic.

You can also limit the number of fulfillment orders assigned to a location by defining its fulfillment order capacity. The Location object has three fields for working with fulfillment order capacity:

Track Fulfillment Order Capacity

Indicates whether the location's capacity is tracked. The default value is `false`.

Fulfillment Order Capacity

The maximum number of fulfillment orders that can be assigned to the location per user-defined time period. If this value is null, then the location's capacity is unlimited.

Assigned Fulfillment Order Count

The number of fulfillment orders currently assigned to the location. To define the time period associated with the maximum capacity, reset this value at a certain interval. For example, to track capacity per day, run an automated job that sets this value to 0 for each location at midnight of the location's time zone.

Manage location capacity using these Connect API resources and Flow Core Actions:

Hold Fulfillment Order Capacity

When you want to assign a fulfillment order to a location, hold capacity for it at that location. If the location has no remaining free capacity, it returns an error. Free capacity is defined as the location's fulfillment order capacity minus the sum of its held capacity and assigned fulfillment orders.

Confirm Held Fulfillment Order Capacity

When you assign a fulfillment order to a location, confirm held capacity for it at that location. Confirming held capacity increases the location's assigned fulfillment order count and decreases its held capacity.

Release Fulfillment Order Capacity

If you held capacity for a fulfillment order at a location, and decide not to assign that fulfillment order to that location, release the held capacity. Releasing capacity decreases the location's held capacity without increasing its assigned fulfillment order count.

Get Fulfillment Order Capacity Values

Getting the values returns a location's maximum capacity, assigned fulfillment order count, and capacity being held. This function is the only way to retrieve the held quantity, because it isn't represented by a field on the Location object.

> 📝 Note: Changing a location's `Assigned Fulfillment Order Count` doesn't affect its held capacity. For example, resetting the assigned count at midnight doesn't remove held capacity for unassigned fulfillment orders. To decrease held capacity, you must confirm or release it.

For details about the Location object, see Location in the *Object Reference*.

When you design your fulfillment workflow, implement logic to route each fulfillment order to a location.

If you plan to use Salesforce Omnichannel Inventory to manage your inventory locations, create location groups and assign locations to them. Set the ShouldSyncWithOci field to `true` for locations and location groups that are part of your Omnichannel Inventory implementation. For more information on setting up Omnichannel Inventory, see the Omnichannel Inventory Implementation Guide.

Configure Object Statuses

It's important to track the status of orders and fulfillment orders as they make their way through the workflow. It's also important for you to be able to customize the available statuses to match your business processes. However, you don't want to reconfigure your actions and flows for every custom status that you create. That's where status categories come in. When you set a fulfillment order record's status, you're also setting its status category.

You can customize the lists of statuses as long as you associate each status with a status category. But you can't change the provided status categories. So when your processes depend on a record's status category, you know that it never changes, even if you change the list of statuses.

The status category of a fulfillment order drives the quantity fields on the order product summaries associated with its fulfillment order products.

You can add more order statuses based on your business processes. Some suggested statuses for activated orders include:

- Approved
- Waiting to Fulfill
- Fulfilled

The Order Summary object includes a Status field, but not a Status Category field. Standard Order Management functionality doesn't use order summary statuses, though they can be useful for implementing custom business processes. We recommend that you configure the order summary statuses to match your order statuses.

Object Type	Status Category	Default Statuses
Fulfillment Order	Draft	• Draft
	Activated	• Allocated
	Fulfilling	• Assigned • Pickpack
	Closed	• Fulfilled
	Canceled	• Canceled
Order	Draft	• Draft
	Activated	• Activated
Order Summary	N/A	• Created
Process Exception	Active	• New • Triaged
	Inactive	• Ignored • Paused • Voided

Object Type	Status Category	Default Statuses
	Resolved	• Resolved
Return Order	Activated	• Activated • Submitted
	Canceled	• Canceled
	Closed	• Closed
	Draft	• Draft

Sample Fulfillment Packages

We provide a collection of sample fulfillment packages to SI partners. They include flows, processes, and Apex classes that show how to implement Order Management functionality with Salesforce Flow. The examples demonstrate allocation, fulfillment, and ways to manage invoices and payments. You can customize them or use them as inspiration when creating your own flows and processes.

For details, refer to the documentation included with the packages. For general information on working with flows, see Salesforce Flow in *Automate Your Business Processes* in Salesforce Help.

Configure Payment Gateways and Methods for Order Management

Set up payment gateways and payment methods to process payment transactions for Order Management.

Set Up Payment Gateways

Configure a payment gateway adapter for each merchant account. If you use multiple currencies or payment methods through a single payment processor, you can optionally set up multiple payment gateways for that processor. By default, the Order Management integration with Salesforce B2C Commerce only supports credit card and digital wallet payment types, but you can create your own customizations.

Your developers can use Apex and Connect REST API to set up payment gateways. See commercepayments namespace and Use Cases for the commercepayments Namespace in the *Apex Developer Guide*, and Commerce Payments Resources in the *Connect REST API Developer Guide*.

Standard Payment Methods for B2C Commerce

The B2C Commerce integration processes each storefront payment method in the order data as follows:

1. Does the payment method ID in the order data match the following non-case-sensitive regular expression? If so, then create a Digital Wallet record in Salesforce.

```
paypal|visa_checkout|pay_by_check|.*(apple|google|android|amazon|ali).*(pay)*
```

2. Does the payment method ID in the order data match the Gateway Provider Payment Method Type of a GtwyProvPaymentMethodType record in Salesforce? If so, then create a record in Salesforce according to the GtwyProvPaymentMethodType's Payment Method Type.

3. Does the card type in the order data match an entry in the Card Type picklist on the Card Payment Method object in Salesforce? If so, then create a Card Payment Method record in Salesforce.

> ✎ Note: You can't customize the Card Type picklist.

4. Return an error message that the payment method isn't supported.

To support a different payment type, set up a custom payment method as described in the next section.

Custom Payment Methods

If you use a storefront payment method that doesn't match a standard Card Payment Method or Digital Wallet payment method, configure a custom payment method for it. If you're integrating with B2C Commerce, configure a custom payment method for any payment method that meets the following criteria:

- The default regular expression doesn't identify it as a Digital Wallet method.
- It doesn't match any of the standard card types for a Card Payment Method.

To configure a custom payment method as an Alternative Payment Method, first create a record type for the Alternative Payment Method object. Give the record type a name that represents the payment method. For information on creating record types, see Create Record Types in *Salesforce Help*.

Define a custom payment method by creating a GtwyProvPaymentMethodType (Gateway Provider Payment Method Type) record for it. The gateway provider payment method type associates the custom payment method with a payment gateway and defines it as an Alternative Payment Method, Card Payment Method, or Digital Wallet.

> ✎ Note: You can't create or access a GtwyProvPaymentMethodType record in the Salesforce UI. To create one, insert a record using a tool like Postman or Apex code. The API name of the object is GtwyProvPaymentMethodType, at the URL
> `/services/data/v`***version***`/sobjects/GtwyProvPaymentMethodType`.

Set the GtwyProvPaymentMethodType fields as described here. Your developers can help you identify the correct values.

Comments
    Optional description.

Developer Name
    The unique API name of the record.

Master Label
    A human-readable name for the record.

Gateway Provider Payment Method Type
    The name of the payment method in the storefront. If you're integrating with B2C Commerce, then this value must exactly match the payment method ID used in B2C Commerce.

Payment Gateway Provider Id
    Reference to the Payment Gateway Provider record associated with the payment processor for the payment method.

Payment Method Type
    AlternativePaymentMethod CardPaymentMethod, or *DigitalWallet*. To use Alternative Payment Method, first create a corresponding Record Type record.

Record Type Id
    If using an Alternative Payment Method, this value is a reference to the Record Type record.

Here's an example of a gateway provider payment method definition:

```
{
  "DeveloperName" : "BankTransfer"
```

```
   "MasterLabel" : "Bank Transfer",
   "GtwyProviderPaymentMethodType" : "directBanking",
   "PaymentGatewayProviderId" : "0cJaa0000000001E67",
   "PaymentMethodType" : "AlternativePaymentMethod",
   "RecordTypeId" : "012aa000000008A34F"
}
```

Make Your Service Flows Available on the Order Summary Record Page

You can give users easy access to your flows by adding them to the Actions & Recommendations component on the order summary FlexiPage.

1. From Setup, in the Quick Find box, enter *Actions & Recommendations*, and then select **Actions & Recommendations**.

2. Click **New Deployment**, and then click **Next**.

3. After you name the deployment, select **Flows and quick actions**, deselect **Recommendations**, and click **Next**.

4. In the Available Objects list, find **Order Summary**, move it to the Selected Objects list, and click **Next**.

5. Select the **Default** tab.

6. In the All Actions list, find your cloned flows, and drag them to the **Top Pinned** section.

7. Select your flows using the checkboxes next to their names, and click **Unmark Removable**.

8. Click **Next**, and then click **Save**.

9. In Lightning App Builder, edit the Order Summary record page.

   Note: To edit the default record page, your org must have an order summary record. To create an order summary, create and activate an order. Activating an order triggers the Create Order Summary flow. Because order summaries require several related records, don't try to manually create an order summary.

10. Open an order summary record page.

11. From the Setup menu, select **Edit Page**.

12. Select the Actions & Recommendations component in the preview layout.

13. In the **Actions & Recommendations Deployment** field, select the deployment you created, and click **Save**.

14. In the dialog that appears, click **Activate**, and then click **Save**.

15. Click **Activation**.

16. Save the page layout as the org default.

   Note: For more information on configuring an Actions & Recommendations component, see the *Lightning Flow for Service Developer Guide*.

Import Historical Order Data

After you start using Salesforce Order Management in production, you can import historical order data from your legacy system for reference purposes.

Normally, for orders that are no longer subject to servicing, you import them as unmanaged orders. For information about importing order data, see Importing Order Data in the *Order Management Developer Guide*.

Configure Salesforce B2C Commerce Storefront Integration

Configure the integration of Salesforce Order Management with a Salesforce B2C Commerce storefront.

Out of the box, you can integrate Salesforce Order Management with a Salesforce B2C Commerce storefront based on the Storefront Reference Architecture (SFRA). The steps in this topic apply mainly to an integration with an SFRA-based storefront.

📝 **Note:** If you don't use Salesforce Omnichannel Inventory, then you can integrate Order Management with multiple instances of B2C Commerce. However, if you use Omnichannel Inventory, Order Management, and B2C Commerce together, then your Order Management org can only integrate with one instance of B2C Commerce.

If your storefront is based on SiteGenesis, or any other framework, you must implement a custom integration.

📝 **Note:** The default integration is designed to import order data from B2C Commerce and doesn't process any records in the Salesforce org after it creates them. For example, if you manually load order data, new records are always created unless you implement a check for duplicate data.

Set Up the Trust Relationship Between Order Management and B2C Commerce

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

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

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

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

   📝 **Note:** If you don't see **Manage Cloud-to-Cloud Connections**, return to the Order Management settings page and verify that you activated the **B2C Commerce Connection** setting.

4. If you use Salesforce Omnichannel Inventory, and already set up a trust relationship with B2C Commerce, the connection appears here. If so, and you plan to use the same connection for Order Management, then you can skip to the next section. Otherwise, continue with these steps.

5. Click **New Connection**.

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

7. In the Remote Tenant URL field, enter the base URL for your B2C Commerce instance. For example:
   `https://zzex-064.sandbox.us02.dx.commercecloud.salesforce.com`

   📝 **Note:** Don't include any other path elements, such as `/on/demandware.store/Sites-Site`.

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

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

10. Click **Establish Connection**.

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

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

Create B2CE WebStores

The Even Exchange flow requires the user to select a WebStore that represents your B2C Commerce storefront. If your storefront supports multiple currencies, then you create one WebStore for each possible combination of currency and locale that can appear in order data.

📝 **Note:** An order's currency code and locale ID are matched with a WebStore's IsoCurrencyCode and DefaultLanguage, respectively. Thus, in Business Manager Site Settings, you can only select locales that match valid values for a WebStore DefaultLanguage. You can't select "default." For details about supported languages, see the WebStore Topic in the Object Reference for Salesforce and Lightning Platform.

You can't create a WebStore with the required values in the Salesforce UI, so use a tool like Postman or Apex code. Define these properties:

Name
Any unique name

CurrencyIsoCode
Required for orgs that support multiple currencies. This value matches the currency code in order data.

DefaultLanguage
Required for orgs that support multiple languages. This value matches the locale ID in order data.

DefaultTaxLocaleType
NET or *GROSS*

ExternalReference
Use the format *instanceId + @ + siteName*. For example, *abc_123@SiteGenesis*

SupportedCurrencies
Required for orgs that support multiple currencies. Include only one value, which must match CurrencyIsoCode.

SupportedLanguages
Required for orgs that support multiple languages. Include only one value, which must match DefaultLanguage.

Type
B2CE

To get your storefront's instance ID, follow these steps:

1. In your B2C Commerce instance, log into Business Manager.

2. Go to **Administration** > **Server Status**.

3. Select the Server Properties tab.

4. Find tenant.id.

Here's an Apex code example for creating a WebStore:

```
WebStore createWebStore( String name, String instanceId, String siteName ) {
    WebStore store = new WebStore(
        Name = name,
        // Either NET or GROSS
        DefaultTaxLocaleType = 'NET',
        // Format expected is instanceId@siteName; example abc_123@SiteGenesis
        // If multicurrency is enabled then uncomment these lines:
        //CurrencyIsoCode = 'USD',
        //DefaultLanguage = 'en_US',
        //SupportedCurrencies = 'USD',
        //SupportedLanguages 'en_US',
        ExternalReference = instanceId + '@' + siteName,
        Type = 'B2CE');
```

```
    return store;
}

WebStore webStoreRecord = createWebStore('Apex1 WebStore', 'abc_123', 'SiteGenesis');
insert webStoreRecord;
```

Here's a multicurrency example. Let's say that you have one site supporting US orders in US dollars, and one site supporting UK orders in pounds or Euros and French orders in Euros. Create four WebStores with these values:

Name	External Reference	Currency IsoCode	Default Language	DefaultTax LocaleType	Supported Currencies	Supported Languages	Type
SiteGenesis USD	abc_123@ SiteGenesis	USD	en_US	NET	USD	en_US	B2CE
SiteGenesis Global GBP en	abc_123@ SiteGenesis Global	GBP	en_GB	GROSS	GBP	en_GB	B2CE
SiteGenesis Global EUR fr	abc_123@ SiteGenesis Global	EUR	fr_FR	GROSS	EUR	fr_FR	B2CE
SiteGenesis Global EUR en	abc_123@ SiteGenesis Global	EUR	en_GB	GROSS	EUR	en_GB	B2CE

Support Person Accounts

The Order Management B2C Service permission set provides the integration with access to Salesforce records. If you're using Person Accounts to represent shoppers, verify that this set has access to them by following these steps:

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

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

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

4. Select **Accounts**.

5. Click **Edit**.

6. In the Account: Record Type Assignments section, select all of the record types.

7. Click **Save**.

Configure Shopper Account Identification

By default, the integration identifies an existing shopper record by its name or email address, as described in Order Management Shopper Records in *Salesforce Order Management* in Salesforce Help. You can configure it to identify existing shoppers by applying your org's duplicate and matching rules for Accounts, Contacts, and Person Accounts. To enable this feature:

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

2. Set the B2C Integration Data Matching Rules toggle to **Active**.

For more information on configuring duplicate management, see Manage Duplicate Records in Salesforce Help.

> **Note:** If your org's matching rules identify multiple potential duplicate records, the integration selects the one with the highest match score. If multiple records tie for the highest match score, you can't guarantee which is selected.

> **Note:** Applying complex custom matching rules can affect the integration's performance.

Enable the Integration in B2C Commerce

When you're ready to send order data from B2C Commerce to Order Management, follow these steps:

1. Log into Business Manager.

2. Select your site.

3. Navigate to **Merchant Tools** > **Site Preferences** > **Order**.

4. In the Order Management Settings section, set **Include in Order Management** to **Yes**.

5. Click **Apply**.

> **Note:** This setting isn't replicated to development or production instances. Turn it on manually for each instance.

Configure Sales Channels

Create Sales Channel records to represent the sales channels that provide orders to your org.

Sales channels in Salesforce correspond to your B2C Commerce Sites. For each Site in your storefront, create a sales channel record in Salesforce, and set the sales channel's Name field to match the Site ID.

> **Note:** In a B2C Commerce order payload, the Site ID is the `site/site-id` value.

B2C Commerce Storefront Data in Salesforce

The following tables illustrate some of the key mappings between B2C Commerce order data and Salesforce Order Management objects. You can find a complete, detailed map of all data in an order payload in the *Salesforce Order Management Developer Guide*.

This table shows some of the B2C Commerce system objects included in an order payload and the Salesforce records that the integration creates using their data. B2C Commerce objects appear in the left column. Order Management objects that the integration creates from the order data appear in the right column.

> **Note:** The integration creates base records such as orders and order products. Order Management then creates summary records based on them, such as order summaries and order product summaries.

Objects in B2C Commerce	Derived Objects in Order Management
Order	Order, Account, and Contact > **Note:** To represent a shopper, the integration creates either a person account or a regular account and a contact. The choice is based on the shopper type and current Person Accounts for Shoppers admin setting.

Objects in B2C Commerce	Derived Objects in Order Management
Gift Certificate Line Item, Product Line Item, or Shipping Line Item	Order Product, Order Item Tax Line Item, Order Delivery Group, and Product 📝 **Note:** Order delivery groups combine one or more order products that have the same delivery method and recipient address. 📝 **Note:** A product is created when no matching record exists.
Price Adjustment	Order Item Adjustment Line Item and Order Adjustment Group 📝 **Note:** Order adjustment groups combine one or more order item adjustment line items representing discounts that apply to multiple order products.
Order Payment Instrument or Order Payment Transaction	One or more Card Payment Methods, Digital Wallets, Payment Authorizations, or Payment Gateways
Payment Method	Used to identify the payment method, but doesn't map to a specific object
Shipment	Order Delivery Group

This table illustrates how some data fields map between B2C Commerce and Salesforce Order Management. These fields are used to look up records, so keep them synchronized.

B2C Commerce Data	Order Management Object Field
Shipping Method ID	Order Delivery Method object—Reference ID field
Product SKU	Product object—SKU field
Payment Processor ID	Payment Gateway object—Reference ID field
Site ID	Sales Channel object—Name field
Customer Email Address	• When using person accounts for the shopper: Account object—Person Email field • When using a standard account and contact for the shopper: Contact object—Email field
Customer Billing Address First Name and Last Name (concatenated)	Account object—Name field (individual shoppers when not using person accounts)
Customer Billing Address Company Name	Account object—Name field (business shoppers)

When the integration receives order data, it checks whether the shopper exists in Salesforce Order Management. If so, then it uses the existing shopper records. For details about how Order Management ingests shopper data, see Order Management Shopper Records in *Salesforce Help*.

> ☑ **Note:** When order data includes a company name in the billing address, the integration always represents the shopper with a standard account record and a contact record. The Person Accounts for Shoppers setting only affects individual shoppers that don't have a company name value.

State and Country Codes

The values you use in your storefront order data depend on whether you enable state and country/territory picklists in Salesforce.

> ☑ **Note:** For information about state and country/territory picklists, see Let Users Select State and Country from Picklists in Salesforce Help.

- If Salesforce state and country/territory picklists aren't enabled:
  - The state code value in your storefront order data must match a standard 2-character ISO state or province code.
  - The country code value in your storefront order data must match a standard 2-character ISO country code.
  - The integration copies each code to the State or Country field on records in Salesforce.

- If Salesforce state and country/territory picklists are enabled:
  - The state code value in your storefront order data must match the state code of an entry in the Salesforce state picklist.
  - The country code value in your storefront order data must match the country or territory code of an entry in the Salesforce country/territory picklist.
  - The integration copies each code to the State Code or Country Code field on records in Salesforce. The corresponding State or Country field is set to the matching integration value from the picklist.

Organization-Wide Sharing Defaults

The B2C Integration service user is an internal Salesforce user. If you set internal organization-wide sharing defaults for any objects accessed by the integration, set them to **Public Read/Write** access.

> ☑ **Note:** For information about organization-wide sharing defaults, see Organization-Wide Sharing Defaults in Salesforce Help.

Integrate Custom B2C Commerce Storefront Data

The integration can pass custom data on certain B2C Commerce objects to Order Management. To set up the transfer, add custom attributes to objects in B2C Commerce, and add matching custom fields to the corresponding objects in Order Management. As long as the attribute ID and field name match, and the data types match, the integration includes those values when it creates Order Management records. If you also create a matching field on the corresponding summary object, Order Management includes the custom data when it creates a summary record.

> ☑ **Note:** The integration compares the B2C Commerce attribute ID and the Order Management field name at the API level. It doesn't consider their UI labels.

If order data includes a custom attribute value, but the corresponding Salesforce object has no matching custom field, the integration ignores that attribute. If a custom field exists in Salesforce, and order data doesn't include a matching custom attribute value, the integration ignores it.

Be sure to consider datatype compatibility between your storefront and Salesforce. The B2C Commerce integration modifies any text value in order data that exceeds the size of the corresponding field in Salesforce. In that case, it truncates the value to three characters less than the datatype size limit, then appends three periods (`...`). For example, if order data includes the value `Albuquerque` for a custom field with a maximum length of 10 characters, the integration stores the value `Albuque...` in Salesforce. For information on datatypes in Salesforce, see Custom Field Types in Salesforce Help.

🛑 **Important:** If a custom field in Salesforce is required, and it corresponds to a custom storefront attribute, then order data must include a value for that attribute. Without that value, the integration can't create the corresponding Salesforce record. In that case, the integration fails with an error.

📝 **Note:** At the API level, custom field names in Salesforce always end in ___c. Don't include it in the names of the matching attributes on your storefront objects. However, if you include a custom namespace in a custom field name, also include it in the name of the matching storefront object attribute. For example, if the API name of your custom field in Salesforce is `mynamespace_FieldName__c`, name your matching storefront object attribute `mynamespace_FieldName`. Limit your custom field names to 40 characters (37 plus ___c).

You can use matching custom attributes and fields on these sets of objects.

B2C Commerce	Salesforce Order Management
Gift Certificate Line Item, Shipping Line Item, and Product Line Item	Order Product and Order Product Summary
Order	Order and Order Summary
Order Payment Instrument and Payment Transaction	Card Payment Method, Digital Wallet, Payment Authorization, and Payment Gateway Log
Shipment	Order Delivery Group and Order Delivery Group Summary

The Order Management B2C Service permission set provides the integration with access to Salesforce records. When you add a custom field to a Salesforce object, update that permission set by adding read and edit access to the new field. You also must add edit access to the permission set that provides access for your Order Management users.

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

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

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

4. Select the object that has the custom field.

5. Click **Edit**.

6. In the Field Permissions section, select the **Edit Access** checkbox for the custom field.

7. Click **Save**.

8. Return to the list of permission sets by selecting **Permission Sets** in the Setup navigation menu.

9. Select the permission set that controls access for your Order Management users. Normally, it's called **OM Console**.

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

11. Select the object that has the custom field.

12. Click **Edit**.

13. In the Field Permissions section, select the **Edit Access** checkbox for the custom field.

14. Click **Save**.

Manage Product Bundles from B2C Commerce

You can support product bundles by passing that information as custom data.

> 📝 **Note:** The integration doesn't currently support custom attributes on B2C product options.

To set up product bundle associations, define a custom guid attribute for the line item object in your storefront. In Salesforce, define a matching field on Order Product and Order Product Summary. When creating an order, assign the same value to the custom attribute on line items that belong together. You can define another custom attribute to identify a line item as part of a bundle. Then build logic into your fulfillment process to handle them accordingly.

> 📝 **Note:** When using custom attributes to support bundles, customize your return and cancel flows to handle them according to your business rules. For example, design your cancel process so that when you cancel a bundle product, any associated bundle products are also canceled. Likewise, you can design your return process to disallow the return of only some of the products in a bundle.

Troubleshooting the Integration in B2C Commerce Business Manager

If the integration isn't receiving orders from your storefront, you can check the status of open orders on the Orders Page in Business Manager.

> 📝 **Note:** The references to "Order Management" in the B2C Commerce Infocenter refer to the legacy Commerce Cloud Order Management product, not to Salesforce Order Management. However, the order status information is relevant to this integration.

If you see order delivery method errors, verify that the Amount field on the method's associated product record isn't empty and that it has the value *0*.

Update Salesforce Order Management from the Previous Version

To update an existing Salesforce Order Management implementation to Summer '22, follow these instructions along with the setup steps.

Update Process

1. Familiarize yourself with Salesforce Order Management's new and changed features by reviewing the release notes.

2. If you implement Salesforce Omnichannel Inventory, your corresponding Order Management org can only integrate with one instance of B2C Commerce.

3. The new Order Entry and Pricing API for Adding and Exchanging Items will be made available soon. If you're interested in implementing it now, reach out to your Salesforce account manager.

   > 📝 **Note:** To use this feature, you must also configure exchanges.

4. The Summer '22 release includes new object fields that require field-level security settings. Configure field-level security in your org as described in Configure Field-Level Security for Order Management.

5. The Summer '22 release adds features for prioritizing fulfillment locations and for managing their capacity to handle fulfillment orders. For information on how to configure and use them, see Configure Fulfillment.

6. Order Management includes new reporting features. For information on configuring and using them, see the Order Management Reports topic in Salesforce Help.

7. Deactivate your existing standard flows. Make note of any customizations you made to them so you can recreate the customizations in the new versions.

   - Cancel Item Flow
   - Create Order Summary Flow

- Create Process Exception Flow
- Reship Order Flow (Before the Spring '22 release, this flow template was called the Create Reship Order Flow.)
- Discount Flow
- Return Item Flow
- If using B2B Commerce:
    - Subflow - Activate Order Flow (Remember to include the customization for creating managed order summaries.)
    - B2B Checkout Flow
- If using RMA:
    - RMA Create Credit Memo and Ensure Refunds Flow
    - RMA Return Items

8. Create and activate new flows from the standard flow templates, as described in the standard flows setup steps on page 15. The process includes new steps, so follow them carefully. Recreate your flow customizations.

    📝 **Note:**
    - Starting in the Summer '22 release, you can configure the behavior of price adjustments applied to order items in the process of being fulfilled. The new version of the Discount Item flow creates a separate change order for those order items, but the default behavior is to disallow adjustments to those items. If you use a customized version of the Discount Item flow, consider this behavior when configuring it. For information on the available options, see Flow Core Action for Order Management: Adjust Order Item Summaries Submit in Salesforce Help.
    - The Even Exchange Flow is available with a Salesforce Order Management Growth license.
    - When customizing the Create Order Summary Flow, remember to include any customizations for unmanaged order summaries.
    - If you're using B2B Commerce, include the Subflow - Activate Order Flow and B2B Checkout Flow. Follow the specific instructions for them in the flow setup steps.
    - A flow that uses Omnichannel Inventory actions must have a runtime API version of 52.0 or later. When possible, always use the latest API version in your flows.

9. If you plan to use unmanaged order summaries, customize the logic in the Create Order Summary flow to assign the OrderLifeCycleType. The default flow always creates managed order summaries. For information about managed and unmanaged order lifecycle types, see Order Lifecycle Management in Salesforce Help.

10. If you use Salesforce Omnichannel Inventory, customize the Create Reship Order flow to set the `applyOCI` variable to `true`. Its default value is `false`.

11. Create an Actions & Recommendations deployment for any new service agent flows, and update it on the order summary FlexiPage.

12. In Spring '21, Salesforce introduced Enhanced Domains for My Domain URLs routed through Salesforce Edge Network. If you turn on Enhanced Domains, then your org URLs change and you must inform Salesforce Support that you're using Enhanced Domains. Open a case and provide your new org login URL. To find your org's login URL, click your profile image in the upper right corner of the Salesforce UI. The login URL is displayed under your username.

    📝 **Note:** Starting in Winter '23, Enhanced Domains will be required for all orgs. For information on Enhanced Domains, see the Enhanced Domains topics in Salesforce Help.

13. If you turn on the Optional Price Books feature, then you don't have to create price book entries for delivery method products. In addition, Order Management doesn't create price book entries for product records that it creates from order data. However, if you turn off the feature, you must add price book entries manually.

14. If you enable Salesforce state and country picklists, then the state and country code values in your storefront order data must match state and country codes in your Salesforce picklists. When the picklists are enabled, the B2C Commerce integration does the following:

- Sets Salesforce StateCode and CountryCode field values to the codes in your order data.
- Sets Salesforce State and Country field values to the integration values from your picklists that correspond to the codes in your order data.

   📝 **Note:** For information about state and country picklists, see Let Users Select State and Country from Picklists in Salesforce Help.

15. If you haven't been using Person Accounts to represent individual shoppers, and decide to turn on that feature, then check your Order Management permission sets. After turning on the feature, follow these steps:

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

   b. Select the permission set that controls access for your Order Management users. Normally, it's called **OM Console**.

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

   d. Select **Accounts**.

   e. In the Account: Record Type Assignments section, check whether the **Assigned Record Types** boxes are selected for both Business Account and Person Account.

   f. If either box isn't selected, click **Edit**. Then select both boxes and click **Save**.

   g. Repeat the process for the **Order Management B2C Service** permission set.

Troubleshooting the Update

- If you're integrated with Salesforce B2C Commerce, and your org ID or login URL changes, or you run DBInit on your storefront, the integration can break. In that case, open a case with Salesforce Customer Support to reprovision your integration. See Setup Step 3: Request B2C Commerce Integration Enablement.
- If you refresh a sandbox org, or change the Tenant ID of a B2C Commerce instance, repeat the implementation process. For information on sandbox orgs, see the sandbox topics in Salesforce Help.
- If orders imported from B2C Commerce remain in Sending Pushed status and return `'GtwyProvPaymentMethodType'` `is not supported` errors:

   1. Try refreshing the integration:

      i. From Setup, in the Quick Find box, enter `Order Management`, and then select **Order Management**.

      ii. Set the B2C Integration toggle to **Inactive**.

      iii. Wait about ten seconds, then refresh the page. Verify that the toggle is inactive.

      iv. Set the B2C Integration toggle to **Active**.

         📝 **Note:** Activation of this toggle can take several minutes.

   2. Try resubmitting any failed orders. If you still get the error, verify that the B2C Service permission set has permission for the GtwyProvPaymentMethodType object:

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

      ii. Select the Order Management B2C Service permission set.

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

      iv. Select **Gateway Provider Payment Method Types**.

      v. Click **Edit**.

      vi. In the Object Permissions section, select all checkboxes in the **Enabled** column.

      vii. Click **Save**.

3. Try resubmitting any failed orders. If you still get the error, contact Salesforce Customer Support.

- If the B2C Commerce integration fails with an error trying to access a Salesforce object, such as Product2, check the organization-wide sharing default settings for that object. The internal setting must be **Public Read/Write**. For information on organization-wide sharing defaults, see Organization-Wide Sharing Defaults in Salesforce Help.