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Salesforce Order Management Implementation Guide for B2B and D2C Commerce

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ORDER MANAGEMENT FOR B2B OR D2C COMMERCE

Order Management helps retailers fulfill, manage, and service orders at scale with real-time inventory, payment and invoicing, order allocation, and fulfillment. This guide describes the steps to implement Order Management with B2B Commerce and D2C Commerce.

Some functionality described in this guide is included with D2C Commerce implementations. Other features are available only with the purchase of an Order Management Starter or Growth license.

[Prepare Your Org](#)

Configure person accounts, currencies, and other org settings to work with your product.

[Configure Order Management](#)

Configure the features and flows of Order Management.

[Configure Fulfillment](#)

Configure Order Management objects to support your order fulfillment process. We offer sample fulfillment packages that include flows, processes, and Apex classes that show how to implement Order Management functionality with Salesforce Flow. You can customize them or use them as inspiration to create your own flows and processes.

[Configure Payment Processing](#)

Processing payments is an integral part of the order management process. To let Order Management execute payment authorizations, captures and issue refunds, integrate a payments component. You can view payment activity in the order payment summary for each order.

[Configure Access and Permissions](#)

Configure field-level security settings and users and permissions.

[Import Historical Order Data](#)

After you start using Order Management in production, you can import historical order data from a legacy system for reference purposes. This functionality is available only with an Order Management Starter or Growth license.

Prepare Your Org

Configure person accounts, currencies, and other org settings to work with your product.

[Prerequisites](#)

Make sure that you've met the prerequisites before implementing Order Management.

[Enable Admin Settings for Order Management](#)

Order Management requires specific admin settings.

[Enable Person Accounts](#)

You can represent shoppers using person accounts instead of using contacts on standard business accounts. If you're using D2C Commerce, you must enable person accounts. For B2B Commerce, person accounts are optional.

[Enable Multiple Currencies \(Optional\)](#)

To use multiple currencies, enable multiple currencies and then add each currency.

Prerequisites

Make sure that you've met the prerequisites before implementing Order Management.

- Make sure Lightning Experience is enabled on your org. Order Management isn't supported on Salesforce Classic or Mobile. You can view record pages on Mobile, but can't use other Order Management features.
- Purchase and activate an Order Management license. A license is included with a developer org or when you're using a partner-approved Order Management template ID to create a trial org.
- For general information about Order Management concepts, objects, and records, see [Salesforce Order Management Help](#).

Enable Admin Settings for Order Management


Order Management requires specific admin settings.

1. From Setup, in the Quick Find box, find and select **Order Settings**.
2. Select these settings: **Enable Orders**, **Enable Negative Quantity**, **Enable Zero Quantity**, **Enable Enhanced Commerce Orders**.
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 the record type from being used for reduction orders. For information on creating and using record types, see [Tailor Business Processes to Different Users](#).
3. Decide whether you want to enable the Optional Price Books feature. If so, select **Enable Optional Price Books for Orders**.
You can use orders in Salesforce while managing price books in an external platform.
If you're using D2C Commerce, you must select **Enable Optional Price Books for Orders**.
4. Save the settings.
5. Log out of the org and log back in.
6. From Setup, in the Quick Find box, enter *Order Management*, and then select **Order Management**.
7. Turn on Order Management.
Turning on Order Management enables the objects, APIs, and fields that Order Management uses. The process can take several minutes to complete. If you don't see the Order Management app in the App Launcher immediately, wait a few minutes and refresh the page.
8. If you're using person accounts to represent individual shoppers, turn on **Person Accounts for Shoppers**.
Turning on person accounts can take up to an hour.

The Order Entry and Pricing API for Adding and Exchanging Items isn't yet generally available. If you're interested in implementing it, contact your Salesforce account manager. To use this feature, you must also configure exchanges.

Enable Person Accounts

You can represent shoppers using person accounts instead of using contacts on standard business accounts. If you're using D2C Commerce, you must enable person accounts. For B2B Commerce, person accounts are optional.

 **Warning:** Enabling person accounts is irreversible and changes your database structure. Carefully consider the implications. See [Person Accounts](#).

1. Enable Person Accounts.
 - a. From Setup, in the Quick Find box, find and select **Person Accounts**.

Order Lifecycle Statuses

Each object type has status categories with default statuses that reflect the order lifecycle. Find these statuses in Object Manger, in the Statuses section of an object type. You can't change the status categories, but you can customize and add statuses as long as you associate each status with a status category. Having status categories that never change is helpful if you have custom processes that depend on a record's status category.

Configure Return Reasons for Order Servicing Workflows

The Cancel Item, Discount, Return Item, and Even Exchange flows require you to select a return reason from a dropdown list. Some examples of reasons are *Wrong Item* or *Customer Changed Mind*. Define a list of reasons, and add them as picklist values.

Configure Return and Rejection Reasons for Return Merchandise Authorization

The RMA Return Items flow requires you to select a return or rejection reason from a dropdown list. Some examples of reasons are *Wrong Item* or *Customer Changed Mind*. Define a list of reasons and add them as picklist values. The RMA flow is available only with an Order Management Growth or Starter license.

Configure Tax Display

If you only do business in a locale that uses net taxation, such as sales tax, no extra configuration is needed. If you do business in a locale that uses gross taxation, such as value-added tax (VAT), you need to configure your page layouts to display amounts that combine prices and taxes. If you're using multiple currencies, add a user profile for service agents and create page layouts that use gross tax fields.

Order Management Flows

Order Management works with Salesforce Flow, which makes it easy for you to create manual and automated functions in your org. It includes flow templates for processes such as order summary creation, placing orders on behalf of shoppers, order fulfillment, and order servicing. Some of the flow templates are available only with a Starter or Growth license.

For information about configuring Order Management flows, see [Salesforce Order Management: Configure Order Management Flows](#).

B2B Checkout Flow and Order Management

If you're using Order Management with B2B Commerce checkout flows, configure the B2B checkout flow to integrate Order Management.

See [Update B2B Checkout Flows to Work with Salesforce Order Management](#).

Order Lifecycle Statuses

Each object type has status categories with default statuses that reflect the order lifecycle. Find these statuses in Object Manger, in the Statuses section of an object type. You can't change the status categories, but you can customize and add statuses as long as you associate each status with a status category. Having status categories that never change is helpful if you have custom processes that depend on a record's status category.

Object Type	Status Category	Default Statuses
Fulfillment Order	Draft	<ul style="list-style-type: none"> Draft
	Activated	<ul style="list-style-type: none"> Allocated
	Fulfilling	<ul style="list-style-type: none"> Assigned Pickpack

Object Type	Status Category	Default Statuses
	Closed	<ul style="list-style-type: none"> Fulfilled
	Canceled	<ul style="list-style-type: none"> Canceled Rejected
Order	Draft	<ul style="list-style-type: none"> Draft
	Activated	<ul style="list-style-type: none"> Activated
Order Summary	—	<ul style="list-style-type: none"> Created
Process Exception	Active	<ul style="list-style-type: none"> New Triaged
	Inactive	<ul style="list-style-type: none"> Ignored Paused Voided
	Resolved	<ul style="list-style-type: none"> Resolved
Return Order	Activated	<ul style="list-style-type: none"> Activated Submitted
	Canceled	<ul style="list-style-type: none"> Canceled
	Closed	<ul style="list-style-type: none"> Closed
	Draft	<ul style="list-style-type: none"> Draft

Configure Return Reasons for Order Servicing Workflows

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1. From Setup, in the Quick Find box, find and select **Object Manager**.
2. Select the **Order Product Summary Change** object.
3. Click **Fields & Relationships**.
4. Select **Reason**.
5. To add a new reason to the Reason Picklist Values, click **New**, create your reason, and click **Save**.
6. Select a default value.
 - a. Click **Edit** for the value.
 - b. Select **Default**.
 - c. Click **Save**.

Configure Return and Rejection Reasons for Return Merchandise Authorization

The RMA Return Items flow requires you to select a return or rejection reason from a dropdown list. Some examples of reasons are *Wrong Item* or *Customer Changed Mind*. Define a list of reasons and add them as picklist values. The RMA flow is available only with an Order Management Growth or Starter license.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.
2. Select **Return Order Line Item**.
3. Click **Fields & Relationships**.
4. Select **Reason for Return**.
5. To add a new reason to the Reason for Return Picklist Values, click **New**, create your reason, and click **Save**.
6. Select a default value.
 - a. Click **Edit** for the value.
 - b. Select **Default**.
 - c. Click **Save**.
7. Save your changes.
8. Verify that all the entries are also in the Reason picklist on Order Product Summary Change.

All Reason for Return values in the Order Product Summary Change must have a matching value in the Return Order Line Item.
9. Go back to **Return Order Line Item > Fields & Relationships** and select **Reason for Rejection**.
10. Add your rejection reasons to the Reason for Rejection Picklist Values.

Reasons for rejection are reasons you can't accept the return, such as *Item Is Perishable*.
11. Select a default value.
12. Save your changes.

Configure Tax Display

If you only do business in a locale that uses net taxation, such as sales tax, no extra configuration is needed. If you do business in a locale that uses gross taxation, such as value-added tax (VAT), you need to configure your page layouts to display amounts that combine prices and taxes. If you're using multiple currencies, add a user profile for service agents and create page layouts that use gross tax fields.

1. From Setup, in the Quick Find box, find and 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](#).
3. Edit or clone the Standard User profile.
 - a. From Setup, in the Quick Find box, find and select **Profiles**.
 - b. If you only do business in a locale that uses gross taxation, edit the Standard User profile.
 - c. 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.
 - d. Assign the gross taxation page layouts to the user profile.
4. After creating at least one Order Summary record, configure the gross tax fields. If necessary, return to this step later in the implementation process.
5. In Salesforce Order Management, open any Order Summary record details page.
 - a. From the Setup menu on that page, select **Edit Page**.
 - b. Configure the Fields for Gross Tax Orders section of the Totals component.
 - c. Save and activate the page.

Configure Fulfillment

Configure Order Management objects to support your order fulfillment process. We offer sample fulfillment packages that include flows, processes, and Apex classes that show how to implement Order Management functionality with Salesforce Flow. You can customize them or use them as inspiration to create your own flows and processes.

[Fulfillment Types](#)

Order Management supports three fulfillment categories. Each category is associated with one or more fulfillment types. You can't change the categories, but you can customize the list of types as long as you associate each category with at least one type.

[Configure Fulfillment Locations](#)

Configure the location object to represent your locations and, optionally, location priorities. Then create a location record for each fulfillment location.

Fulfillment Types

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To customize fulfillment types, edit the picklist values for the Type field on the Fulfillment Order object.

Fulfillment Category	Default Fulfillment Types
Physical	<ul style="list-style-type: none"> • Warehouse • Retail Store • In Store Pickup
Drop Ship	<ul style="list-style-type: none"> • Supplier
Digital	<ul style="list-style-type: none"> • Download • Email

Configure Fulfillment Locations

Configure the location object to represent your locations and, optionally, location priorities. Then create a location record for each fulfillment location.

1. From Setup, in the Quick Find box, find and select **Object Manager**.
2. Select **Location > Fields & Relationships > Location Type**.
3. Add your locations to the Location Type Picklist Values.
Examples of a location type are *Warehouse* or *Retail Store*.
4. Select a default value.
 - a. Click **Edit** for the value.
 - b. Select **Default**.
 - c. Click **Save**.
5. (Optional for customers using routing) Create a location ranking system to prioritize locations.
If you're using the Order Management license included with D2C Commerce, you can't use a priority ranking system.
 - a. Select **Location > Fields & Relationships > Priority**.
 - b. Add numeric values to the Priority Picklist Values.
The lower the number, the more preferred the location is.
 - c. Select a default priority value.
6. Save your changes.
7. Create a location record for each fulfillment location.
If you're using the Order Management license included with D2C Commerce, you can use only one location.
 - a. From the App Launcher, select **Locations**.
 - b. Click **New**.
 - c. Enter a name for the location, and select a value for **Location Type**.
 - d. If you plan to use Salesforce Omnichannel Inventory to manage your inventory locations, select **Sync with OCI** for locations and location groups that are part of your Omnichannel Inventory implementation.
 - e. If you're using a routing and have configured a location ranking system, set the priority for the location.

- f.** Optionally, limit the number of fulfillment orders assigned to a location by defining its fulfillment order capacity. If you're using the Order Management license included with D2C Commerce, these order capacity fields aren't available.
 - **Track Fulfillment Order Capacity**—To track the location's capacity, set this option to `true`. The values of Fulfillment Order Capacity and Assigned Fulfillment Order Count are then used to determine if the location has available capacity.
 - **Fulfillment Order Capacity**—Maximum number of orders that can be assigned to the location. If this value is null, the location's capacity is unlimited.
 - **Assigned Fulfillment Order Count**—To define the time period associated with the maximum capacity for this location, set this value to 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.
- g.** Save your changes.
- h.** Repeat for each location.

SEE ALSO:

[Order Management Flow Core Actions](#)

Configure Payment Processing

Processing payments is an integral part of the order management process. To let Order Management execute payment authorizations, captures and issue refunds, integrate a payments component. You can view payment activity in the order payment summary for each order.

[Salesforce Payments](#)

For easy payment integration with Order Management, install Salesforce Payments, which is available on the core Salesforce platform.

[Manually Configure a Payment Gateway](#)

If you don't use Salesforce Payments, you can manually configure a payment gateway to view and manage payments in Order Management. Configure a gateway for each payment provider, for example, Stripe, PayPal, Adyen, or Cybersource. Payment packages are available on AppExchange for some vendors.

[Payment Sequencing](#)

You can control the sequence in which to apply refund amounts to payment methods. For example, if an order was partially paid with a gift card, you could refund to the gift card first, regardless of how the payment amounts were originally distributed.

Salesforce Payments

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- 1.** Create a payment gateway adapter class using the Salesforce APEX connector framework.

To get started, see these reference classes: <https://github.com/forcedotcom/Core-Payments-Reference-Gateway-Integration-Adapters>.

2. Create a payment gateway provider record that points to the adapter class that you created.
3. In Setup, define a named credential that contains the gateway provider's authentication and login information. The adapter class callout definition calls the named credential.
4. To link the payment gateway provider record and the named credential, create a payment gateway record.

SEE ALSO:

[Use Cases for the CommercePayments Namespace](#)
[Named Credentials](#)
[Commerce Payments Resources](#)
[CommercePayments Namespace](#)

Payment Sequencing

You can control the sequence in which to apply refund amounts to payment methods. For example, if an order was partially paid with a gift card, you could refund to the gift card first, regardless of how the payment amounts were originally distributed.

For information about implementing payment sequencing, see [Payment Sequencing](#) in the *Salesforce Order Management Developer Guide*.

Configure Access and Permissions

Configure field-level security settings and users and permissions.

[Order Management Users and Permissions](#)

To access Order Management features, users require the System Administrator profile, or either the Standard Platform User profile or the Identity User profile along with the Salesforce Order Management feature permission set license. Users 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 you can use as is or clone and customize.

[Configure Access to the Console App](#)

Provide access to the console app for a permission set.

[Configure Field-Level Security](#)

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

Order Management Users and Permissions

To access Order Management features, users require the System Administrator profile, or either the Standard Platform User profile or the Identity User profile along with the Salesforce Order Management feature permission set license. Users 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 you can use as is or clone and customize.

To users assigned to the Identity User profile access Order Management features, configure the tab setting for the Identity User profile for the Account object to Default On. See [View and Edit Tab Settings in Permission Sets and Profiles](#).

User Access


To view the included permission sets, in the Setup Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.

Permission Set	Description
Order Management Operations Manager (Growth or Starter license only)	Ability to manage day-to-day Order Management processes. Limited ability to modify open fulfillment orders.
Order Management Agent (Growth or Starter license only)	Standard Order Management user. Can only modify an open fulfillment order by advancing its status through the workflow.
Order Management Store Associate (Growth or Starter license only)	Limited access that allows an in-store associate to process fulfillment orders.
Order Management Shopper (Growth or Starter license only)	Limited access for a service user to allow an external system to make self-service requests. Read-only access to fulfillment orders.
1Commerce Order Management User	Ability to manage day-to-day Order Management processes. Limited ability to modify open fulfillment orders. Only cancellation and simple returns allowed. No appeasements or unmanaged orders allowed.

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. Each cloned permission set counts against your org's limits.

You can organize your permission sets in 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.

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 is 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.

For more information, see [Data Protection and Privacy](#).

SEE ALSO:

[Permission Sets](#)

[User Licenses](#)

Configure Access to the Console App

Provide access to the console app for a permission set.

1. From Setup, in the Quick Find box, search for and select **Permission Sets**.
2. To create a permission set, click **New**. To add permissions to an existing set, select it.
3. If you're creating a permission set:
 - a. Enter a unique label. We recommend *OM Console*.
 - b. Deselect **Session Activation Required**.
 - c. For License, select **None**.
 - d. Click **Save**.
4. In the Apps section, click **Assigned Apps**.
5. Click **Edit**.
6. For Available Apps, select **Order Management (standard__OMConsole)**, and then click **Add**.
7. Click **Save**.
8. Configure the permission set to access Account records.
 - 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 **Assigned Record Types** all the record types.
 - f. If your org restricts sharing for Account records, in the Object Permissions section, enable **View All**.
To check whether sharing is restricted for account records, from Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
 - g. Save the changes.
9. Repeat the process for each permission set that you want to provide console app access to.

SEE ALSO:

[Sharing Settings](#)

Configure Field-Level Security

Give the System Administrator profile permissions to access specific fields on 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, find and select **Profiles**.
3. Select **System Administrator**.
4. In the Fields & Relationships section, find Order and click **View**.
5. Click **Edit**.
6. Assign Edit Access and Read Access for each object in the table. Some of the permissions and objects aren't available in every version of Order Management. Don't worry. Fill out the available objects and permissions that are visible in your organization.

Object	Read Access	Edit Access
Location (Growth Only)	N/A	<ul style="list-style-type: none"> Assigned Fulfillment Order Count Fulfillment Order Capacity Priority Track Fulfillment Order Capacity
Order	<ul style="list-style-type: none"> Order Amount Order Management Reference Identifier Total Adjusted Delivery Amount Total Adjusted Delivery Tax Total Adjusted Delivery Amount with Tax Total Adjusted Product Amount Total Adjusted Product Tax Total Adjusted Product Amount with Tax Total Delivery Distributed Adjustments Total Delivery Distributed Adjustment Tax Total Delivery Distributed Adjustments with Tax Total Product Distributed Adjustments Total Product Distributed Adjustment Tax Total Product Distributed Adjustments with Tax Total Tax Total with Tax 	<ul style="list-style-type: none"> Billing Email Address Billing Phone Number Bill To Contact Order Name Order Reference Number Ordered Date Sales Channel Sales Store Tax Locale Type

Object	Read Access	Edit Access
Order Product	<ul style="list-style-type: none"> Adjusted Product Subtotal Adjusted Product Subtotal Tax Adjusted Product Subtotal with Tax Distributed Order Adjustments Distributed Order Adjustments Tax Distributed Order Adjustments with Tax Gross Unit Price Product Adjustments with Tax Total Adjustments Total Adjustments Tax Total Adjustments with Tax Total Amount with Tax Total Tax 	<ul style="list-style-type: none"> Line Number Order Delivery Group Reserved at Location
Order Adjustment Group	N/A	<ul style="list-style-type: none"> Description
Order Delivery Group	N/A	<ul style="list-style-type: none"> Deliver to Address
Shipment (Growth Only)	N/A	<ul style="list-style-type: none"> Expected Delivery Date Fulfillment Order Return Order Shipping Provider Status Tracking Number Tracking URL
Shipment Item	N/A	<ul style="list-style-type: none"> Return Order Line Item

Import Historical Order Data

After you start using Order Management in production, you can import historical order data from a legacy system for reference purposes. This functionality is available only with an Order Management Starter or Growth license.

Typically, 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](#).