Salesforce Order Management Implementation Guide for B2B and D2C Commerce

Salesforce, Spring '25

Last updated: December 27, 2024

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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 Growth license.

Prerequisites

Review the prerequisites before configuring Order Management.

Configure Order Management

Some Order Management features require additional setup. Make sure you've run the Commerce Setup Assistant on your org before proceeding.

Configure Access and Permissions

Review and configure 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.

Prerequisites

Review the prerequisites before configuring Order Management.

- You can use Order Management only on Lightning Experience. 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. The Connected Commerce bundle includes Order Management Lite. You can also purchase Order Management Growth or Order Management Lite as a standalone. A license is also 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.
- Run the Commerce Setup Assistant.
  - Run the Basic Setup to install your Commerce products, including Order Management. If you don't run the Commerce Setup Assistant, manually complete the steps in Commerce Setup.
  - If you're using D2C Commerce, enable Person Accounts in Additional Setup. Person Accounts is optional for B2B Commerce. Person Accounts makes permanent changes to your organization.
  - (Optional) Enable and configure Multiple Currency in Additional Setup.

Configure Order Management

Some Order Management features require additional setup. Make sure you've run the Commerce Setup Assistant on your org before proceeding.

Configure Return Reasons

When processing a return, the service flows require a user to select a return reason from a dropdown list, such as Wrong Item or Customer Changed Mind. Define a list of reasons that you want to use and add them as picklist values. Order Management provides some default values.

Configure Gross 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.

Configure Return Reasons

When processing a return, the service flows require a user to select a return reason from a dropdown list, such as Wrong Item or Customer Changed Mind. Define a list of reasons that you want to use and add them as picklist values. Order Management provides some default values.

1. From Setup, in the Quick Find box, find and select **Object Manager**.
2. Set up reasons for the Cancel Item, Return Item, and Even Exchange flows.
   a. Select the **Order Product Summary Change** object.
   b. Click **Fields & Relationships** and select **Reason**.
   c. Click **New**, create your reason, and click **Save**.
   d. To select a default reason, click **Edit** for a reason, select **Default**, and save.
3. Set up reasons for the RMA and Exchange with RMA flows.
   a. In a new tab, go to Object Manager and select **Return Order Line Item**.
   b. Click **Fields & Relationships** and select **Reason for Return**.
   c. Verify that all the entries in the Reason For Return Picklist Values section are also in the Reason picklist in the Order Product Summary Change object.
   d. To select a default reason, click **Edit** for a reason, select **Default**, and save.
4. Set up reasons for rejection for the RMA and Exchange RMA flows.
   a. Go to **Fields & Relationships** for the Return Order Line Item object.
   b. In the Reason for Rejection Picklist Values section. add your reasons for why the return can't be accepted, such as *`Item Is Perishable`*.
   c. To select a default reason, click **Edit** for a reason, select **Default**, and save.

Configure Gross Tax Display

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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 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.

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*.

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.

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

Configure Access and Permissions

Review and configure users and permissions.

Order Management Users and Permissions

To access Order Management features, users need 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.

Order Management Users and Permissions

To access Order Management features, users need 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 let 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, find and select **Permission Sets**.

Permission Set	Description
Order Management Operations Manager (Growth only)	Ability to manage day-to-day Order Management processes. Limited ability to modify open fulfillment orders.
Order Management Agent (Growth only)	Standard Order Management user. Can modify an open fulfillment order only by advancing its status through the workflow.
Order Management Store Associate (Growth only)	Limited access that allows an in-store associate to process fulfillment orders.
Order Management Shopper (Growth only)	Limited access for a service user to allow an external system to make self-service requests. Read-only access to fulfillment orders.

Permission Set	Description
Order Management 1Commerce User (Connected Commerce only)	Ability to manage day-to-day Order Management processes, such as canceling, fulfilling, or returning items.

To use the included permission sets as is, 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 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.

For more information, see Data Protection and Privacy.

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 Records**.

      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

Commerce Order Routing

Install the Commerce Order Routing flow to manage routing and fulfillment. You need Order Routing if your org uses Salesforce Payments to manually capture payments. There are two versions of the order routing flow: Connected Commerce Order Routing and Growth Order Routing.

Install Connected Commerce Order Routing

If you're using Connected Commerce Order Routing, you can install the flow through the Commerce Setup Assistant.

1. In the Commerce Setup Assistant, go to the Additional Setup tab.
2. Install the order routing package.

Install Growth Order Routing

If you're using Growth Order Routing, there are some additional steps after you install the package.

1. Install the Growth Order Routing package links. There are two links, which must be installed in order. You're prompted to enter your org's login credentials.
   a. Install Order Routing Link 1.
   b. Install Order Routing Link 2.
2. If you're using person accounts to represent individual shoppers, verify that they're enabled and configured in your org.
3. From Setup, in the Quick Find box, find and select **Profiles**.
4. Select **System Administrator**.
5. In the Fields & Relationships section, find Location and click **View**.

6. Click **Edit**, and assign Edit and Read access to Assigned Fulfillment Order Count, Fulfillment Order Capacity, Priority, and Track Fulfillment Order Capacity.
7. Click **Save**.

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.

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.