Retail: View Order History and Cancel Orders

B2C Cross-Cloud Solutions

CONTENT

WHAT'S A SOLUTION KIT?

Salesforce solution kits are your go-to when you want to connect your clouds. By connecting your clouds you can deliver impactful, personalized shopping experiences that increase customer conversions, engagement, and loyalty.

Every solution kit gives you:

- A use case overview and the required products.

- A high-level workflow.

- Information about how cloud connectors fit in.

- Required configurations.

- Solution design considerations.

Every kit includes a unique use case that addresses a common cloud connection conundrum. The use case overview gives you a real-world example of the problematic situation that each solution kit solves.

For developers, we include the information necessary to deploy the functionality so that you can deliver a perfectly personalized experience to your ecommerce shoppers. Share these kits with anyone experiencing a cross-cloud dilemma.

BENEFITS OF THIS SOLUTION KIT

This solution kit helps you satisfy customers and enhance customer service. Use this kit to give your agents the ability to cancel Commerce Cloud orders and provide a higher level of service.

The View Order History and Cancel Orders solution kit helps you:

- Provide exceptional customer service experiences

- Meet your shoppers' customer service needs

- Increase engagement with Customer Service

- Give storefront shoppers a personalized experience when you connect Commerce Cloud and Service Cloud.

USE CASE OVERVIEW

Our merchant, Northern Trail Outfitters (NTO), is an outerwear, apparel, and gear retailer for outdoor recreation and fitness.
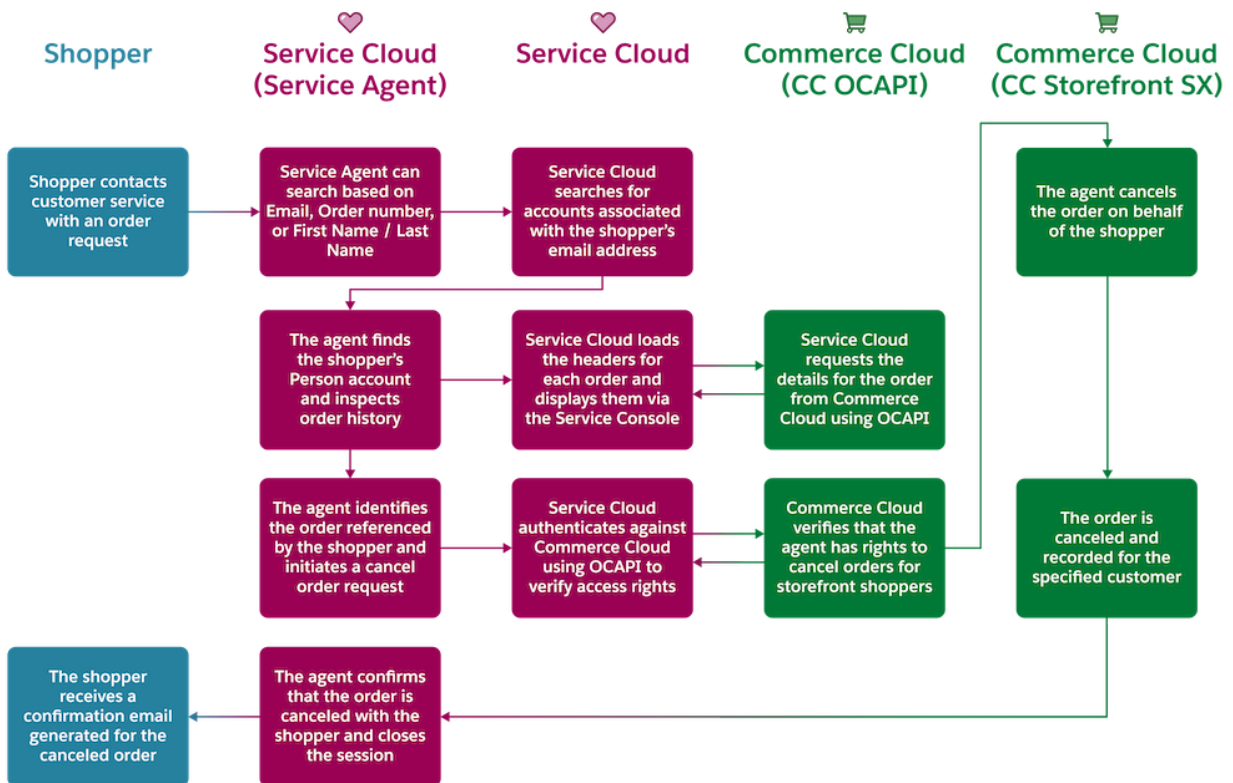
Sometimes, shoppers want to cancel an order because they change their minds about the purchase or find a different item they prefer. NTO wants to let service agents view order history and cancel orders at the shopper's request.

Setting up and configuring the Service Cloud Connector gives NTO's customer service agents the data and necessary permissions to better serve customers. When a shopper calls NTO, service agents can view the shopper's order history and details in Service Console. Agents can launch shopping sessions to *order on behalf of* customers and make incremental updates to customer profiles. Agents can also cancel orders placed within a *buyer's remorse* period for customers.

REQUIRED PRODUCTS

- Commerce Cloud ([SFRA](#) or [SiteGenesis](#))
- Service Cloud
- Mainstreet OMS for advanced order management use cases (optional)

WORKFLOW

CONNECTOR

The Salesforce B2C Commerce [Service Cloud Connector](#) is a Salesforce Labs project that facilitates the integration between Salesforce B2C Commerce and Service clouds. The connector provides a development framework that accelerates integration using public REST APIs to share and synchronize Commerce Cloud customer and order data.

Before implementing the connector, sign into [GitHub](#) and download the Service Cloud Connector. Follow the installation instructions available from the [repository ReadMe.md file](#).

Are you a Commerce Cloud customer or partner and don't have access to the GitHub repository? If you have access to Xchange, you can get access to Github via this [XChange article](#).
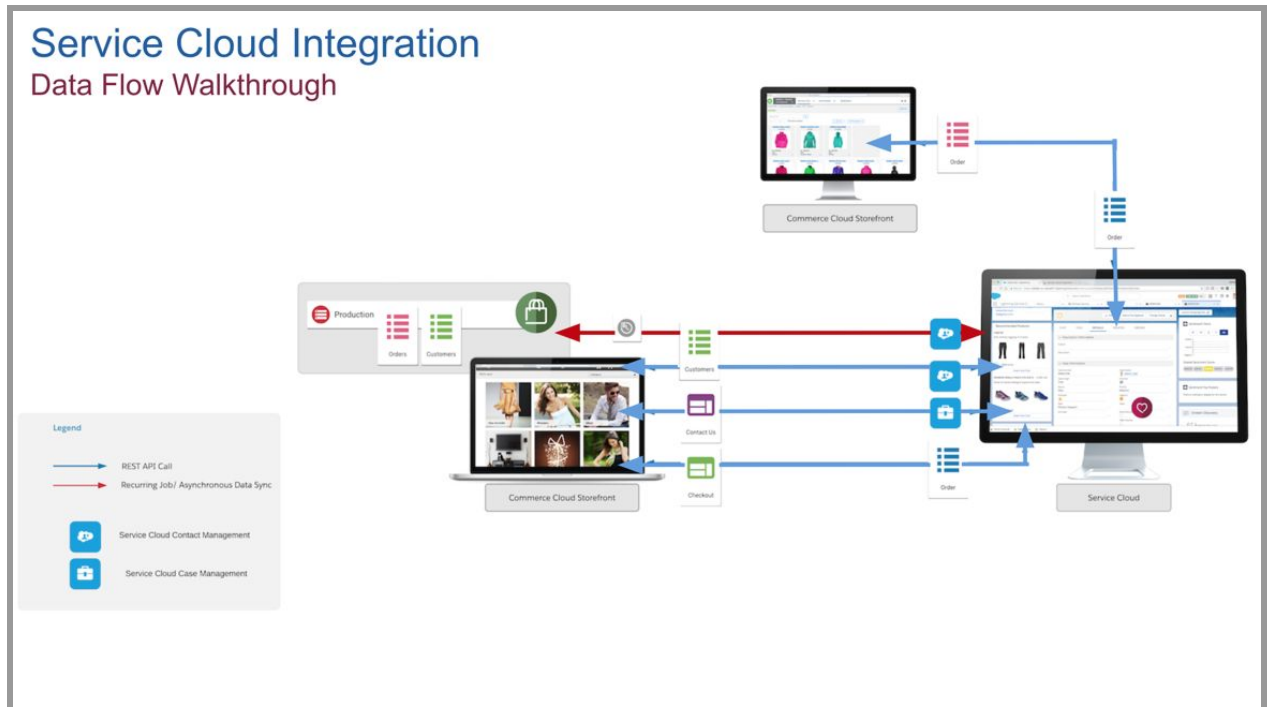
Note: For access to Salesforce B2C Commerce XChange content, talk to your Success Manager.

General Information About Connectors

- Connectors are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.

- Connectors support a core set of use cases that you can extend to support other customer-driven use cases.

- Connectors require customization and configuration in Service Cloud and Commerce Cloud. The Commerce Cloud storefront requires customization as part of the connector integration.

- Implementation and validation require operational and administrative experience with Service Cloud.

- Plan your connector implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Connector

- Accelerate integration time to market for Commerce Cloud and Service Cloud.

- Get a shared view of customers and order data between Commerce and Service clouds.

- Provide self-service through automated case creation from the storefront.

- Convert service interactions into cross-sell and up-sell opportunities through *order on behalf of* during agent-to-customer conversations.

- Support real-time, peer-to-peer data synchronization for customer, order, and case data between Commerce Cloud and Service Cloud.

- Customize the Commerce Cloud and Service Cloud experiences by extending your use cases and implementing new ones.

Service Cloud Integration
Data Flow Walkthrough

Functionality Considerations

The Service Cloud Connector:

- Supports PersonAccounts as the customer model in Service Cloud.

- Does not natively support Accounts and Contacts, Households, or multi-brand customer models.

- Enables the synchronization of registered Commerce Cloud customer profile and address book data with associated Service Cloud PersonAccounts.

- Provides a collection of Lightning and Visualforce components that display customer and order information from within Service Cloud.

- Enables Order on Behalf of (OOBO) functionality for service agents from the customer and case detail displays in Service Cloud.

- Enables data synchronization between Commerce and Service clouds through REST Services exposed and used by the connector.

- Extend the storefront to enable data synchronization with Service Cloud at strategic transaction points (customer registration, profile updates, order placement, and case creation).

- Supports the persistence of Commerce Cloud order line item, shipment, and payment information in Service Cloud

Implementation Considerations

The Service Cloud Connector:

- Requires an integration user with administrative rights configured in Service Cloud.

- Requires a Service Cloud connected app supporting OAuth authentication.

- Requires a Service Cloud Order layout configured with the Connector Lightning components so that agents can view order details and cancel orders.

- Lets you register Commerce Cloud as a remote site with the CORS and trusted site designations.

- Handles only JIT data synchronization. Use a separate process to handle bulk updates, mass customer, and order data migrations.

CONFIGURATIONS

These configurations help you implement the required permissions using Service Cloud and the Commerce Cloud Order View and Cancellation Lightning components.

> **Note:** Before configuring the connector, review the installation documentation available via Github.

Agent Permission Settings

- Each agent with Order Cancel capabilities requires a corresponding Commerce Cloud Business Manager account with Agent permissions.

- The functional permissions agents require include Login_On_Behalf, Login_Agent, and Create_Order_On_Behalf_Of.

- For more information about permissions, see the B2C Roles and Permissions and Functional Permissions pages.

- Agent-specific Commerce Cloud Business Manager credentials attach to Service Cloud Agent accounts through named credentials.

- Rotate Commerce Cloud Business Manager credentials every 90 days. Keep these named credentials in Service Cloud synced on the 90-day schedule.

Order Details Lightning Page Layout

Configure the Service Cloud Order Details Lightning page layout with connector components.

1. Edit the Order details Lightning page layout in Service Cloud.

2. In the component palette, locate the *SCCOrderRefreshComponent* from the custom component list. This component enables the on-demand synchronization of order details between Commerce and Service clouds.

3. Drag the *SCCOrderRefreshComponent* onto the Order details page layout to a location accessible by Service Agents.

4. In the component palette, locate the *SCCCancelOrderComponent* from the custom component list. This component lets agents cancel orders within a "buyer's remorse" window.

5. Drag the *SCCCancelOrderComponent* onto the Order details page layout and place it above the *SCCOrderRefreshComponent*.

6. In the component palette, locate the Visualforce component. This component shows the latest order line items data from Commerce Cloud.

7. Drag the Visualforce component onto the Order details page layout. Select the Visualforce page name *SCCOrderDetails* to enable the order line items listing in the page payout.

Note: Keep Commerce Cloud order details and status current to reflect order status in Service Cloud. If Commerce Cloud is not the system of record for orders, consider integrating Service Cloud with your order management system (OMS) to deliver accurate order status.

Order-Related Custom Objects

- The connector includes custom objects that represent order line items, shipment, and payment information in Service Cloud.

- These objects populate with Commerce Cloud order data when an order syncs between Commerce Cloud and Service Cloud.

- List views representing these objects attach to an Order details layout. This lets agents view an extra level of order detail from Service Cloud.

Note: Maintaining the order line item, shipment, and payment information in Service Cloud increases org storage and billing. For questions on storage limits, contact your Account Executive.

SOLUTION DESIGN CONSIDERATIONS

To achieve the best outcomes, keep these considerations in mind.

Order Cancellation Scenarios

- We recommend implementing a *buyer's remorse period*, which lets agents cancel orders in Commerce Cloud before they get to the OMS and fulfillment workflow. You can give shoppers a set number of minutes to cancel orders using self-service or a service agent.

- We recommend limiting the *buyer's remorse period* time frame to the elapsed time between an order placement in Commerce Cloud and OMS workflow ingestion.

- Commerce Cloud supports [order cancellation](#) when an order's status is new, open, or completed.

- Marketing Cloud customers can include a cancel order call-to-action in the order confirmation email. You can use this call-to-action to trigger the order cancellation via the Commerce Cloud storefront.

- We recommend against implementing Order Cancelation from within the OMS workflow, because it's complex and beyond the scope of this solution kit.

Supported Customer Models

- By default, the connector supports [PersonAccounts](#) as a customer model within Service Cloud.

- When a customer registers in Commerce Cloud, it creates a PersonAccount representing that customer in Service Cloud.

- As that profile changes in Commerce Cloud, the associated PersonAccount in Service Cloud syncs. Changes to the PersonAccount can also sync to Commerce Cloud.

- All cases and orders created in Service Cloud associate to this PersonAccount, giving a single view of the customer's transaction history.

- The connector does not support alternative customer models. This includes accounts and contacts, households, and multi-brand models.

- To support these alternative customer models, customize the connector.

Manage Service Agent Accounts

- To support the connector order use-cases, service agents have corresponding Commerce Cloud Business Manager user accounts.

- The Commerce Cloud Business Manager accounts support the connector's order cancel, order details, and order-on-behalf-of use-cases.

- Each Service Cloud agent account has its Commerce Cloud Business Manager account mapped using [named credentials](#).

- Rotate Business Manager user account [passwords every 90 days](#).

- Make these password changes in Commerce Cloud and apply them to the named credentials associated to each Service Cloud agent's account.

Customize Cross-Cloud Field Mappings

- Configure the customer and order properties synced between Commerce Cloud and Service Cloud using the [fieldMapping custom settings](#) in Service Cloud.

- Use these objects to define which Commerce Cloud object properties map to corresponding Service Cloud object fields.

- [FieldMapping custom setting objects](#) correspond with Service Cloud PersonAccount (AccountFieldMapping) and Order (OrderFieldMapping) objects.

- As you define new field mappings, add these custom fields to their corresponding Service Cloud objects.

- For fields relevant to the customer experience, map them across Commerce Cloud and Service Cloud.

Service Cloud Org Constraints

- The connector syncs order, line-item, shipment, and payment details from Commerce Cloud to Service Cloud. This data resides in custom objects within Service Cloud.

- Overall Service Cloud storage increases based on Commerce Cloud order volume and increased storage usage.

- The connector integration is REST API-based. Every REST API connector request to and from Service Cloud is subject to Salesforce API governor limits.

- Know your [storage allocation](#) and [API governor limits](#) enforced within your org. To request limit increases, contact your Account Executive.

RESOURCES

B2C Commerce

B2C Custom Hooks Overview
B2C Order.xsd Salesforce XML Schema
B2C Sample order.xml
Commerce Cloud Open Commerce Data API Resources
Commerce Cloud Open Commerce Shop API Resources

Service Cloud

Salesforce Named Credentials Overview
Salesforce Person Accounts Overview
Service Cloud Connector Installation Documentation
Setting Up Person Accounts: Installation Guide