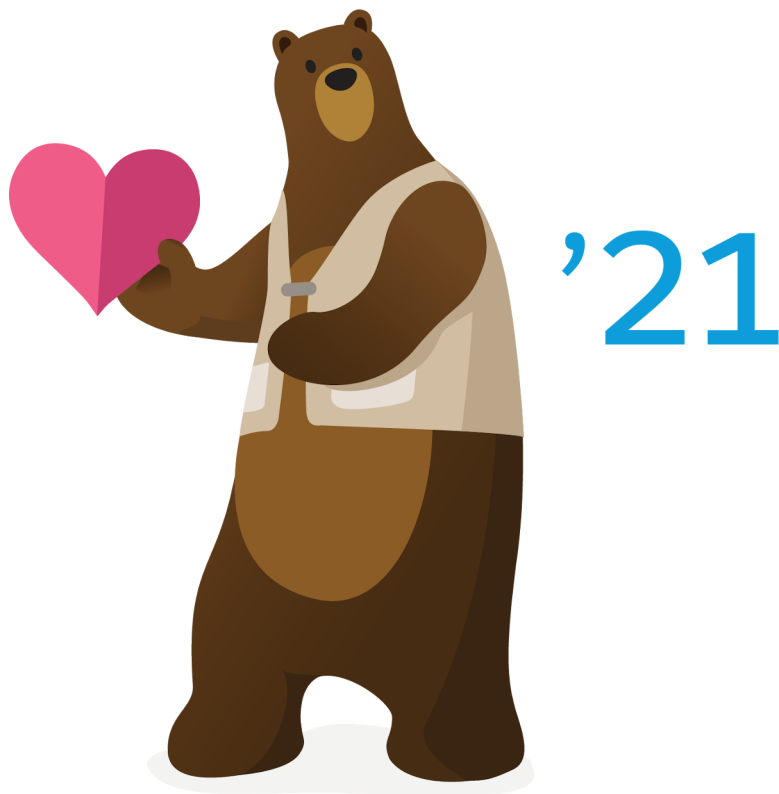




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# Order on Behalf of a Customer

Salesforce, Spring '21





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# ORDER ON BEHALF OF A CUSTOMER

Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.



## Get Started

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Explore system architecture related to this solution.

- [B2C Industry Blueprint](#)
- [B2C Reference Architecture](#)
- [B2C Solution Architectures](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)
- [Customer 360 Guide for Retail: Quick Look](#)
- [Customer 360 Guides: Quick Look](#)

This solution kit help you:

- Increase completed purchases.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Service Cloud.
- Provide exceptional customer service experiences.
- Increase shopper engagement.

## Required Products

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- Commerce Cloud ([SFRA](#) or [SiteGenesis](#))
- Service Cloud

## Implement This Solution

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[Order on Behalf Solution Workflow](#)

Learn how data flows through the configurations to order on behalf of a customer.

Design Considerations

Keep these design considerations in mind when you order on behalf of a customer.

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Salesforce B2C Commerce to Service Cloud Connector to order on behalf of a customer.

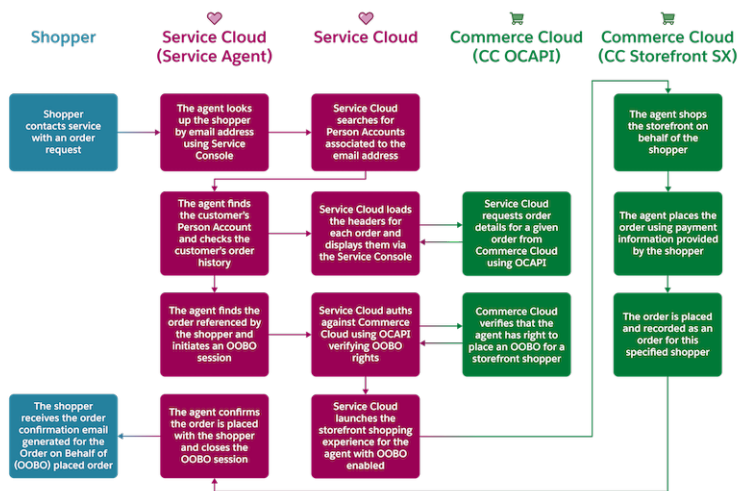
Configurations

Use these configurations to order on behalf of a customer.

# Order on Behalf Solution Workflow

Learn how data flows through the configurations to order on behalf of a customer.

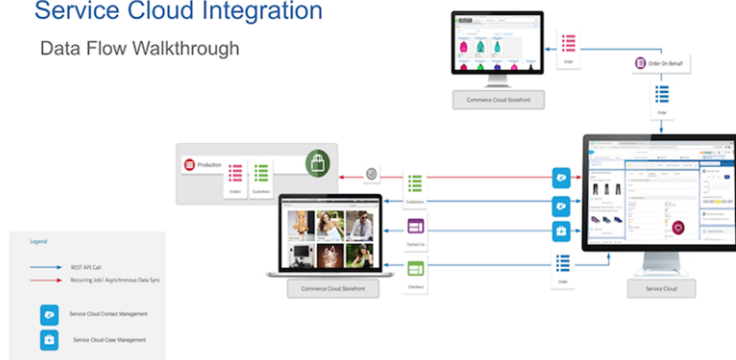
## Workflow



## Understand the Flow of Data

### Service Cloud Integration

Data Flow Walkthrough



## Functionality Considerations

The Service Cloud Connector:

- Supports person accounts in the customer model in Service Cloud, but does not support accounts and contacts.
- Provides a collection of Lightning and Visualforce components that show customer and order information from within Service Cloud.
- Enables functionality for service agents from the customer details display in Service Cloud.
- Enables data synchronization through REST services using Service Cloud and B2C Commerce.

### Implementation Considerations

The Service Cloud Connector:

- Requires an integration user with administrative rights configured in Service Cloud.
- Enables functionality by agents from the Customer Details display in Service Cloud.
- Requires a Service Cloud connected app supporting OAuth authentication.
- Register B2C Commerce as a remote site.
- Isn't available for guests or anonymous storefront shoppers. Use Order on Behalf with registered Commerce Cloud storefront person accounts.
- Lets you launch from within Service Cloud. Include the Commerce Cloud customer number and internal customer ID in the person account.

## Related Content



Review this solution's use case and purpose.

- [Order on Behalf of a Customer](#) on page 1



Take the next steps in this implementation.

- [Design Considerations](#)
- [Connector](#)
- [Configurations](#)

## Design Considerations

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Keep these design considerations in mind when you order on behalf of a customer.

### Registered Storefront Shoppers

When the agent launches the Order on Behalf capability, the Commerce Cloud Customer ID registers the session. The Service Cloud person account uses the Commerce Cloud Customer ID to launch the Order on Behalf capability.

### Person Accounts Configuration

- The connector supports person accounts as a customer model and does not support alternate customer models (Example: accounts and contacts, and households).
- You can use alternate customer models by customizing the connector. Contact your Success Manager for support channels.

### Commerce Cloud Password Reset

- Service agents need a corresponding Business Manager User Account mapped to their Service Cloud User Account via named credentials.

- Rotate Business Manager user account passwords every 90 days.



### Map Custom Fields

- Use the OrderFieldMappings custom setting to map Commerce Cloud order object properties to Service Cloud order object fields.
- Use the AccountFieldMappings custom setting to map Commerce Cloud customer object properties to Service Cloud person account fields.
- Every REST call between Commerce Cloud and Service Cloud counts towards API governor limits.
- To request a governor limit increase, contact your Salesforce Account Executive.

### Custom Field Mapping of Core Objects

Map only the fields for which you need data.

## Related Content

	<p>Review earlier steps in this solution.</p> <ul style="list-style-type: none"> <li>• <a href="#">Order on Behalf Solution Workflow</a></li> </ul>
	<p>Take the next steps in this implementation.</p> <ul style="list-style-type: none"> <li>• <a href="#">Connector</a></li> <li>• <a href="#">Configurations</a></li> </ul>

## See Also

- [B2C Custom Hooks Overview](#)
- [B2C Order.xsd Salesforce XML Schema](#)
- [B2C Sample order.xml](#)

## Connector

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Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Salesforce B2C Commerce to Service Cloud Connector to order on behalf of a customer.

The Salesforce B2C Commerce to Service Cloud Connector is a Salesforce Labs project that facilitates the integration between Salesforce B2C Commerce Cloud and Service Cloud. The connector provides a framework to integrate the clouds by using public REST APIs to share and sync 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

- Share views of customers and order data between both clouds
- Offer self-service through automated case creation using the storefront
- Facilitate agent-to-customer conversations that encourage cross-sell and up-sell opportunities
- Real-time peer-to-peer data synchronization for customer, order, and case data between Commerce Cloud and Service Cloud
- Source code that allows for storefront or Service Cloud customization based on service needs
- Faster integration time to market for both clouds when specifically targeting the supported connector use cases

## Related Content


	<p>Review earlier steps in this solution.</p> <ul style="list-style-type: none"> <li>• <a href="#">Order on Behalf Solution Workflow</a></li> <li>• <a href="#">Design Considerations</a></li> </ul>
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## Configurations

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Use these configurations to order on behalf of a customer.

These configurations let your agents place orders on behalf of shoppers using the Order Lightning components in Service Cloud and Commerce Cloud.

-  **Note:** Before starting configurations, configure the Service Cloud Connector. See the Connector section of this document for the GitHub repository wiki instructions link.

### Permission Settings

- Before giving agents Order on Behalf permissions, verify that the agents are Service Cloud and Commerce Cloud users with Order on Behalf rights.
- To give the correct permissions, use "Login\_On\_Behalf," "Login\_Agent," and "Create\_Order\_On\_Behalf\_Of" business manager functional permissions.
- For more information about permissions, see the B2C [Roles and Permissions](#) and [Functional Permissions](#) pages.
- Define the agent account authentication settings for external systems in Service Cloud. For more information, see [Store Authentication Settings for External Systems](#).

### Lightning Page Layout

1. Add the Order Detail Visualforce component and Cancel Order Lightning components to the Order Details layout and customize them.

2. Drag the Launch Shopping Cart Lightning component to the Case and Person Account page layouts.

 **Note:** You can launch Order on Behalf from the Case Detail and Person Account Detail page layouts.

3. Map the OrderFieldMapping Custom Settings to the Commerce Cloud order address fields from the Service Cloud Order object.
4. Map the Name, Billing, and Shipping fields to the appropriate object fields in Service Cloud.

## Related Content



Review earlier steps in this solution.

- [Order on Behalf Solution Workflow](#)
- [Design Considerations](#)
- [Connector](#)