D2C Commerce Set Up Guide

Salesforce, Winter '24

@salesforcedocs

Last updated: September 28, 2023

CONTENTS

Set Up Salesforce for D2C Commerce 1
Use Commerce Setup Center to Get Your Org Ready for Commerce 2
Enable Digital Experiences for Commerce 2
Enable Commerce Features 3
Confirm Order Settings 4
Enable Person Accounts 4
Configure Sharing Settings 6
Enable State and Country Picklists 7
Customize Commerce Object Page Layouts 7
Configure Internal Users 9
Create a Shopper Profile 10
Customize the Commerce App 11
Multifactor Authentication 12
Prevent Third-Party Attacks on Your Store 13
Configure a Custom Domain and CDN 13
Install Commerce Reports 13
Next Steps 16

SET UP SALESFORCE FOR D2C COMMERCE

Get your Salesforce org ready for D2C Commerce.

Use Commerce Setup Center to Get Your Org Ready for Commerce

The Commerce Setup Center automates setup tasks, including enabling Commerce features, customizing page layouts for Commerce objects, and adding internal users.

Enable Digital Experiences for Commerce

Enable Digital Experiences so that your stores can use Experience Cloud functionality.

Enable Commerce Features

Enable Commerce to provide important features for your stores, including objects and workspaces.

Confirm Order Settings

Order settings are required to enable your store to process purchases. During setup, order settings are automatically set for your stores. After you complete the remaining setup steps, we recommend that you confirm your order settings.

Enable Person Accounts

Person accounts are required for B2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. If your B2B store allows guests to purchase products, you must enable person accounts, or guest checkout fails.

Configure Sharing Settings

Configure default sharing settings for commerce objects.

Enable State and Country Picklists

Stores based on the LWR (Lighting Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.

Customize Commerce Object Page Layouts

To make commerce objects easier to use, customize the object page layouts.

Configure Internal Users

Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.

Create a Shopper Profile

A shopper is an external user with restricted permissions who can visit your B2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

Customize the Commerce App

Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

Multifactor Authentication

Multifactor authentication (MFA) increases protection for user accounts against common threats like phishing attacks, credential stuffing, and account takeovers. As a Salesforce admin, amplify your security by requiring an extra level of authentication at login. You can also require MFA when a user performs certain actions, such as attempting to view reports or access a connected app.

Prevent Third-Party Attacks on Your Store

If you want to add third-party scripts and components to your store, make it impossible for these scripts and components to directly access the session ID (SID) cookie using JavaScript. To prevent attackers from hijacking your session or initiating cross-site scripting, enable the Require HttpOnly setting. This setting applies to your entire Salesforce org.

Configure a Custom Domain and CDN

Every B2B and B2C store, except a store created in a Developer Edition org or a B2B store created with an Aura template, must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) partner. A custom domain and corresponding CDN are optional for a B2B store created with the Aura template, but we recommend them if broad access and high security are required.

Install Commerce Reports

Install commerce reports to track Commerce orders.

Next Steps

When you've completed the setup, you can import data and create and configure stores.

Use Commerce Setup Center to Get Your Org Ready for Commerce

The Commerce Setup Center automates setup tasks, including enabling Commerce features, customizing page layouts for Commerce objects, and adding internal users.

1. From Setup, in the Quick Find box, enter *`Commerce`*.
2. Select **Commerce Setup Center**.

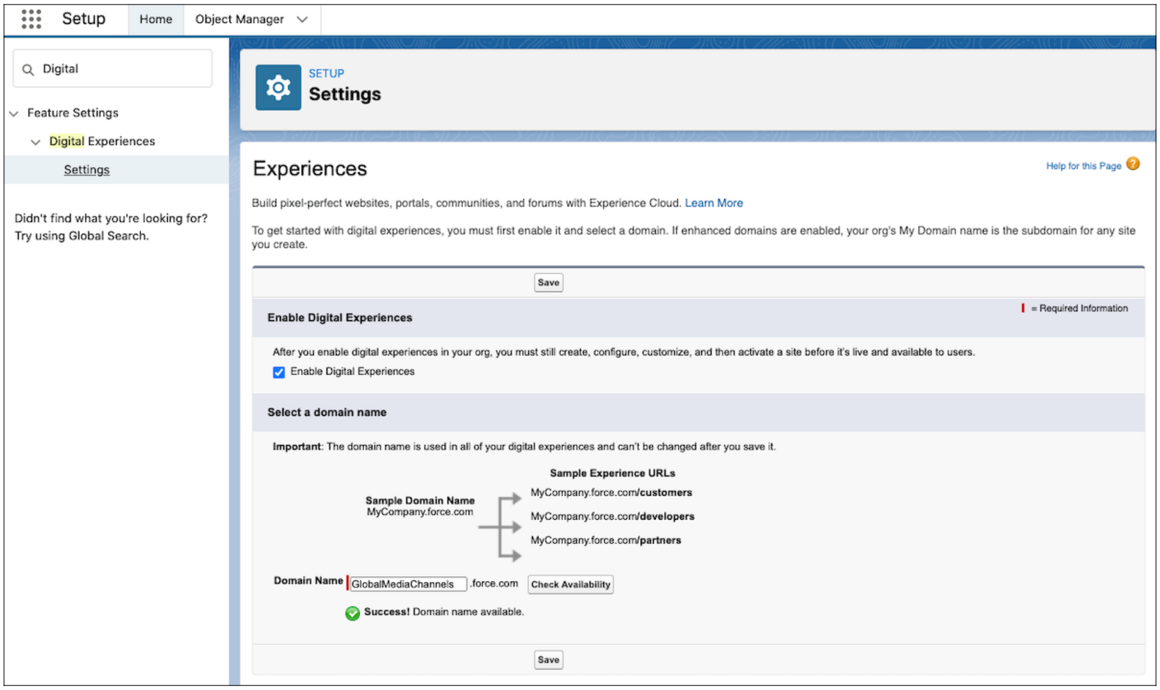
Enable Digital Experiences for Commerce

Enable Digital Experiences so that your stores can use Experience Cloud functionality.

1. From Setup, in the Quick Find box, enter *`Digital Experiences`*. Select **Digital Experiences**, and then select **Settings**.
2. Select **Enable Digital Experiences**.
3. Enter a domain name, and click **Check Availability**.

   We recommend using something recognizable to your users, such as your company name. The domain name you choose is used for all your sites. You create a unique URL for each site by adding a unique name at the end of the URL. For example, if your domain name is `store.example.com` and you're creating a customer site, you can add *`customers`* to create the unique URL `store.example.com/customers`.

   Important: You can't change the domain name after you save it.



4. Click **Save**.

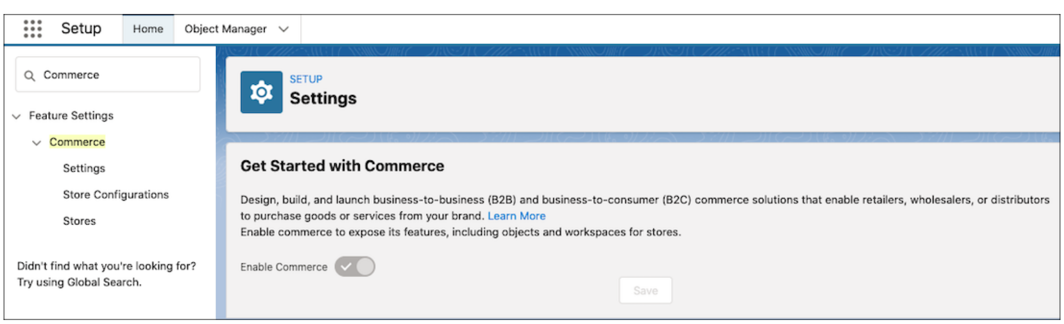
> **Warning:** Enabling Digital Experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates are available to Roles, Internal and Portal Subordinates. Opening up access to site and portal subordinates could expose your Salesforce data to external users.
>
> Use the Convert External User Access Wizard to help ensure that records or folders aren't shared with external users. For more information, see Use the Convert External User Access Wizard.

Starting in Summer '23, new Commerce orgs have the Enhanced Sites and Content Platform setting turned on, which enables the enhanced CMS. The setting is in Setup at Digital Experiences > Settings. To avoid performance issues, be careful not to disable the setting. The enhanced CMS isn't available for orgs provisioned with Commerce before Summer '23 at this time.

Enable Commerce Features

Enable Commerce to provide important features for your stores, including objects and workspaces.

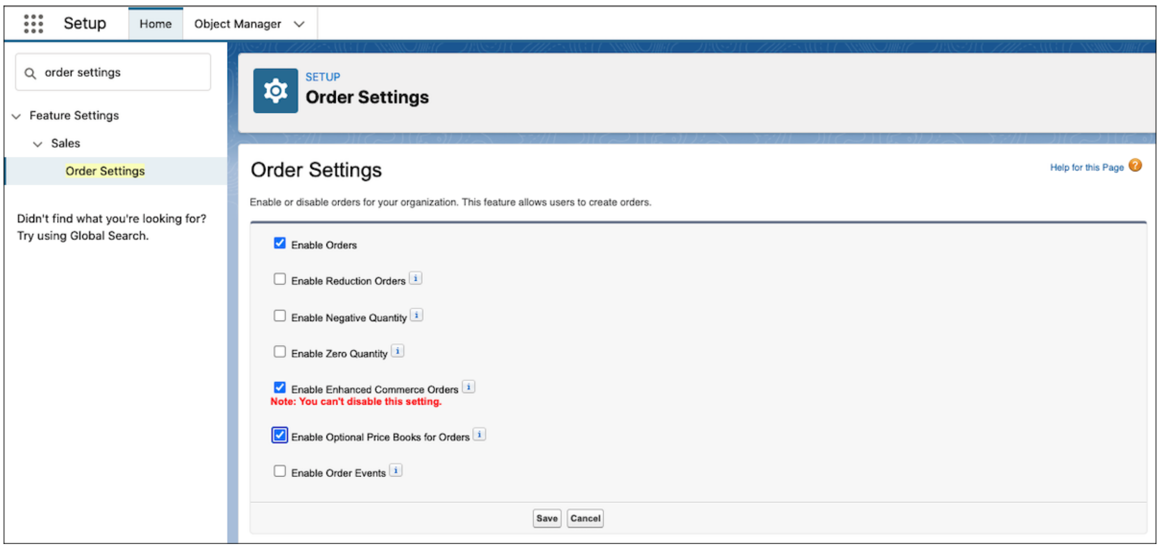
1. From Setup, in the Quick Find box, enter `Commerce`. Select **Commerce**, and then select **Settings**.
2. Click the toggle so that it shows Enable Commerce.
3. Click **Save**.



Confirm Order Settings

Order settings are required to enable your store to process purchases. During setup, order settings are automatically set for your stores. After you complete the remaining setup steps, we recommend that you confirm your order settings.

1. From Setup, in the Quick Find box, enter `Order Settings`, and then select **Order Settings**.
2. Confirm that the following settings are checked.
   - Enable Orders
   - Enable Enhanced commerce Orders. You can't disable this option
   - Enable Optional Price Books for Orders
3. If any of these settings aren't checked, check the missed settings and click **Save**.



Enable Person Accounts

Person accounts are required for B2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. If your B2B store allows guests to purchase products, you must enable person accounts, or guest checkout fails.

Note: In some cases, when you add D2C Commerce to an existing B2B Commerce and Salesforce Order Management implementation, Person Accounts is already enabled. If so, skip these steps.

Important: After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how Person Accounts affect your Salesforce org.

1. Create the Business Account record type.
   a. From Setup, in the Quick Find box, enter `Object Manager`, and then select **Account**.
   b. Click **Record Types**.
   c. Click **New**.
   d. For Record Type Label, enter a name (for example, `Business Account`).

You don't have to use Business Account as the name. However, keep in mind that this record type is used for businesses, not shoppers. After you create a Business Account, you can associate it with multiple contacts (individual employees working for the business).

   e. Click **Next**.

   f. Select a page layout, and click **Save**.

2. Enable Person Accounts.

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

   b. Go through the steps listed on the Setup page.

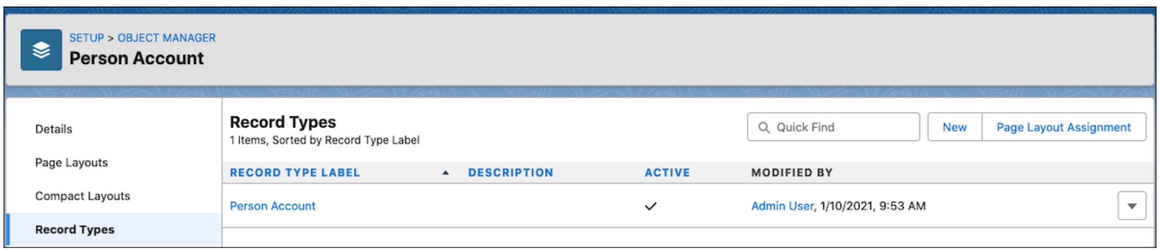
   c. Turn on Person Accounts.

3. Verify that Person Accounts are enabled.

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

   b. Click **Record Types**.

   c. Verify that the Person Account record type is listed.



If you don't see the Person Account record type, contact Salesforce Support.

4. Configure the System Administrator profile.

   The System Administrator profile requires access to the Business Account record type and the Person Account record type.

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

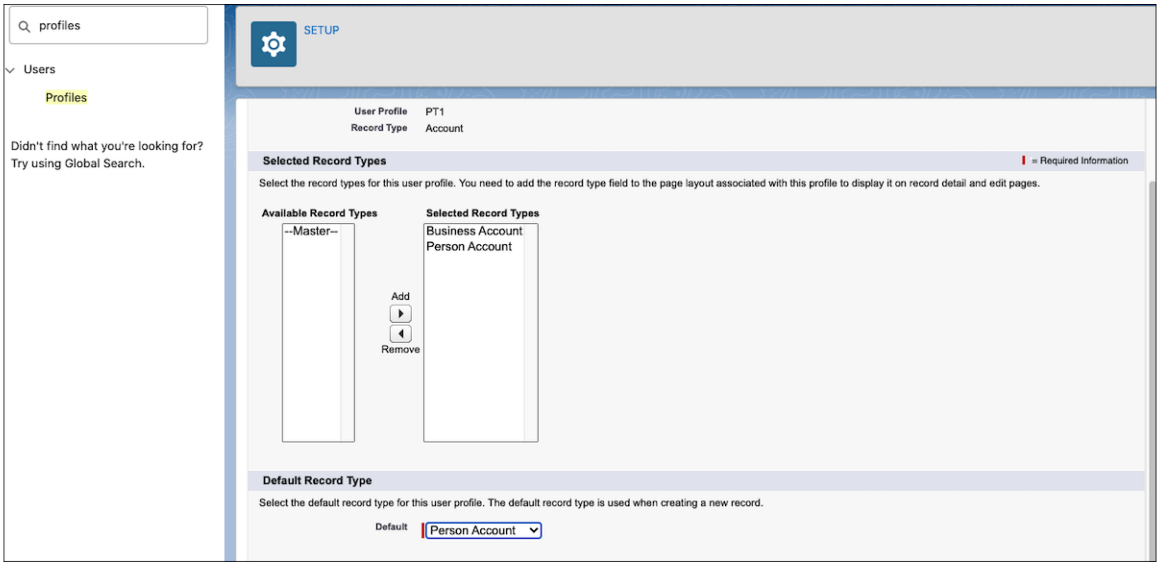
   b. Click **System Administrator**.

   c. Scroll down to Record Type Settings, and read the text next to Accounts.

   d. Click **Edit**.

   e. Make sure that Business Account and Person Account are in the Selected Record Types list on the right.

   f. Under Default Record Type, select **Person Account** as the default.

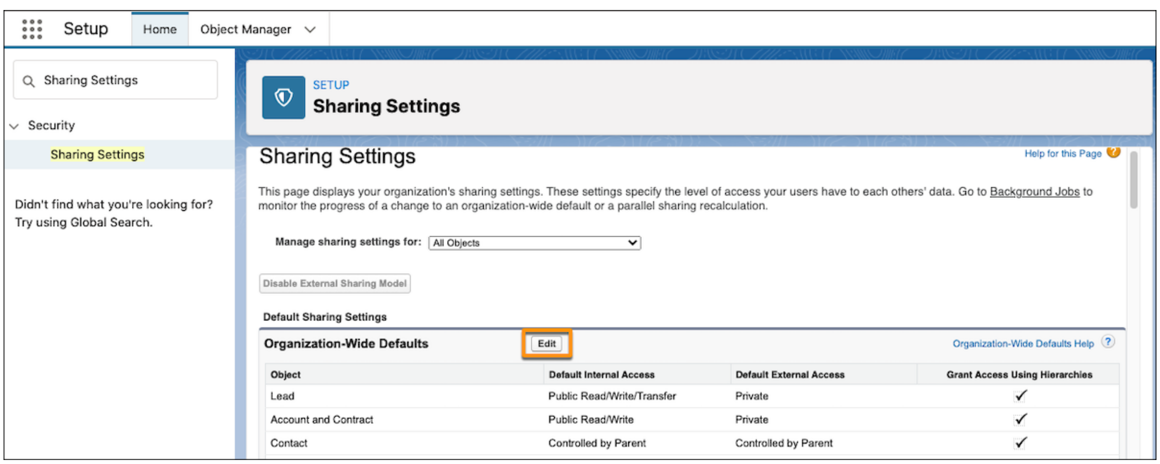


g. Click **Save**.

Configure Sharing Settings

Configure default sharing settings for commerce objects.

1. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.
2. Under Organization-Wide Defaults, click **Edit**.



3. Configure the default external access settings for objects.

Object	Default Access	B2B	D2C
Buyer Group	External	Private	Private
Catalog	External	Private	Private
Electronic Media Group	External	Public Read Only	Public Read Only
Entitlement Policy	External	Private	Private

Object	Default Access	B2B	D2C
Order	External	Private	Private
Order Delivery Method	External	Public Read Only	Public Read Only
Order Summary	External	Private or Controlled by Parent	Controlled by Parent
Product	External	Private Note: For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren't authorized to access.	Private Note: For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren't authorized to access.

4. Click **Save**.

Enable State and Country Picklists

Stores based on the LWR (Lighting Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.

For information about enabling state and Country picklists, see Enable and Disable State and Country/Territory Picklists.

Customize Commerce Object Page Layouts

To make commerce objects easier to use, customize the object page layouts.

Customize the Product Page Layout
Customize the Product page layout to include the Product SKU and Product Class fields and the Categories and Commerce Entitlement Policies related lists.

Customize the Person Account Page Layout
Customize the Person Account page layout to add the Contact Point Addresses related list.

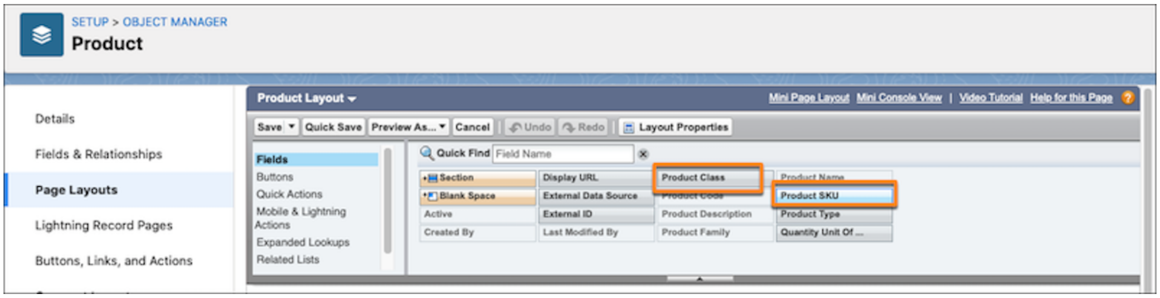
Customize the Order Page Layout
Customize the Order page layout to add the Order Delivery Group related list.

Customize the Product Page Layout

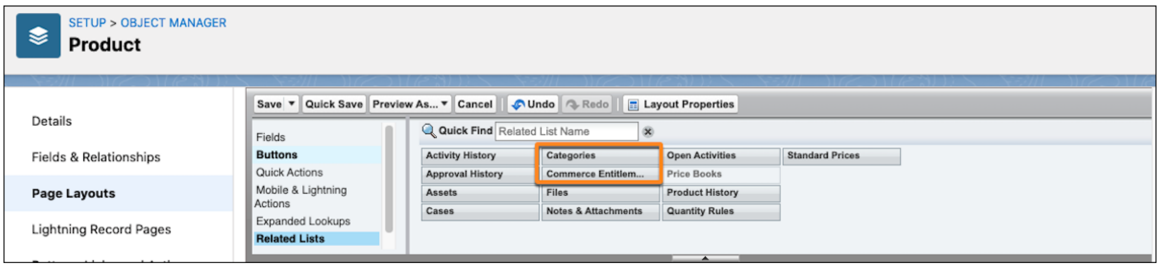
Customize the Product page layout to include the Product SKU and Product Class fields and the Categories and Commerce Entitlement Policies related lists.

1. From the Object Manager, enter `Product` in the Quick Find box.
2. Select **Product** > **Page Layouts** > **Product Layout**.

3. In the Product Layout section, select **Fields**, and drag **Product SKU** and **Product Class** to the Product Detail section.



4. In the Product Layout section, select **Related Lists**, and drag **Categories** and **Commerce Entitlement Policies** to the Related Lists section.

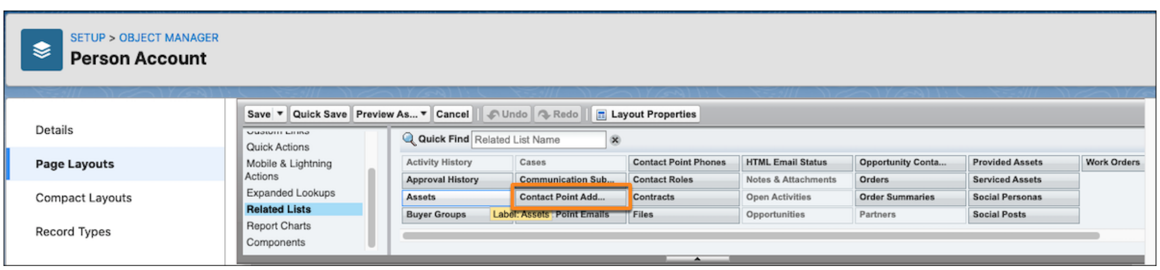


5. Click **Save**.

Customize the Person Account Page Layout

Customize the Person Account page layout to add the Contact Point Addresses related list.

1. From the Object Manager, enter **Person Account** in the Quick Find box.
2. Select **Person Account** > **Page Layouts** > **Person Account Layout**.
3. In the Person Account Layout section, select **Related Lists**, and drag **Contact Point Addresses** to the Related Lists section.

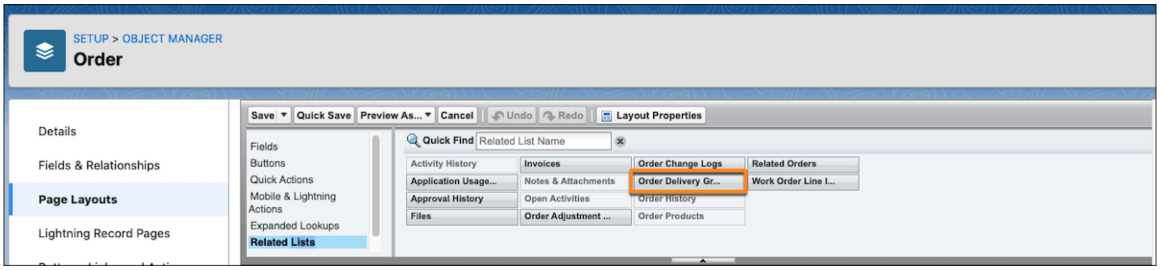


4. Click **Save**.

Customize the Order Page Layout

Customize the Order page layout to add the Order Delivery Group related list.

1. From the Object Manager, enter `Order` in the Quick Find box.
2. Select **Order** > **Page Layouts** > **Order Layout**.
3. In the Order Layout section, select **Related Lists**, and drag **Order Delivery Group** to the Related Lists section.



4. Click **Save**.

Configure Internal Users

Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.

1. Clone the Identity User profile.
   a. From Setup, in the Quick Find box, enter `Profiles`. Next to Identity User Profile, select **Clone**.
   b. For Profile Name, enter `Commerce Business User Profile`.

      You can choose another name, but keep in mind that this profile is used for your internal users.
   c. Click **Save**.
2. Configure the profile that you created.
   a. On the Profiles page, click **Edit** next to the profile you created.
   b. In the Custom App Settings section, for the Commerce app and in the Digital Experiences app, select **Visible**.
   c. In the Tab Settings section, change these items to **Default On**.
      - Accounts
      - Buyer Groups
      - Catalogs
      - Categories
      - CMS Channels
      - CMS Workspaces
      - Commerce Setup
      - Customer Workspace
      - Entitlement Policies
      - Guest Buyer Profile
      - Order Delivery Methods
      - Orders
      - Order Summaries
      - Price Adjustment Schedules
      - Price Books
      - Pricing Workspace

- Promotion Workspace
- Products
- Product Workspace
- Store Price Books
- Stores

d. Click **Save**.

Use the Commerce Business User Profile when creating internal users. When creating a commerce admin user, assign the Commerce Admin permission set. When creating a merchandiser user, assign the Merchandiser permission set.

Note: Both the Commerce Admin permission set and the Merchandiser permission set allow access to buyer groups. Users who have access to buyer groups also have read access to all related buyer group members.

Important: To allow self-registration on stores to work correctly, make sure all internal users who create stores are assigned to a role.

Note: To specify which internal users can access which stores, contact your account executive.

Create a Shopper Profile

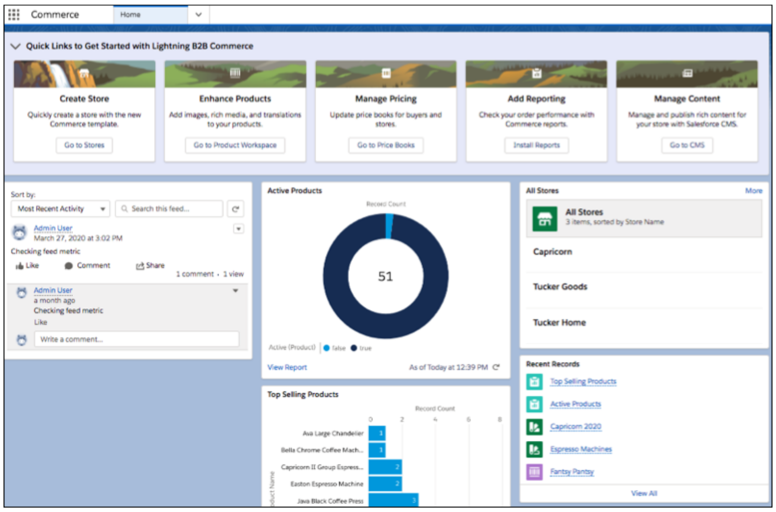
A shopper is an external user with restricted permissions who can visit your B2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

1. Clone the External Apps Login User profile.
   a. From Setup, in the Quick Find box, enter `Profiles`. Next to External Apps Login User, select **Clone**.
   b. For Profile Name, enter `Shopper Profile`.
      You can choose another name, but keep in mind that this profile is used for your shoppers.
   c. Click **Save**.
2. Create a shopper permission set group.
   a. From Setup, in the Quick Find box, enter `Permission Set Groups`, and then select **Permission Set Groups**.
   b. Click **New Permission Set Group**.
   c. For Label, enter `Shopper PSG`.
      You can choose another name, but keep in mind that this permission set group is used for your shoppers.
   d. Click **Save**.
   e. On the Permission Set Groups page, in the Permission Sets section, click **Permissions Sets in Group**.
   f. Select the **Shopper** permission set, and click **Add**.
   g. Click **Done**.

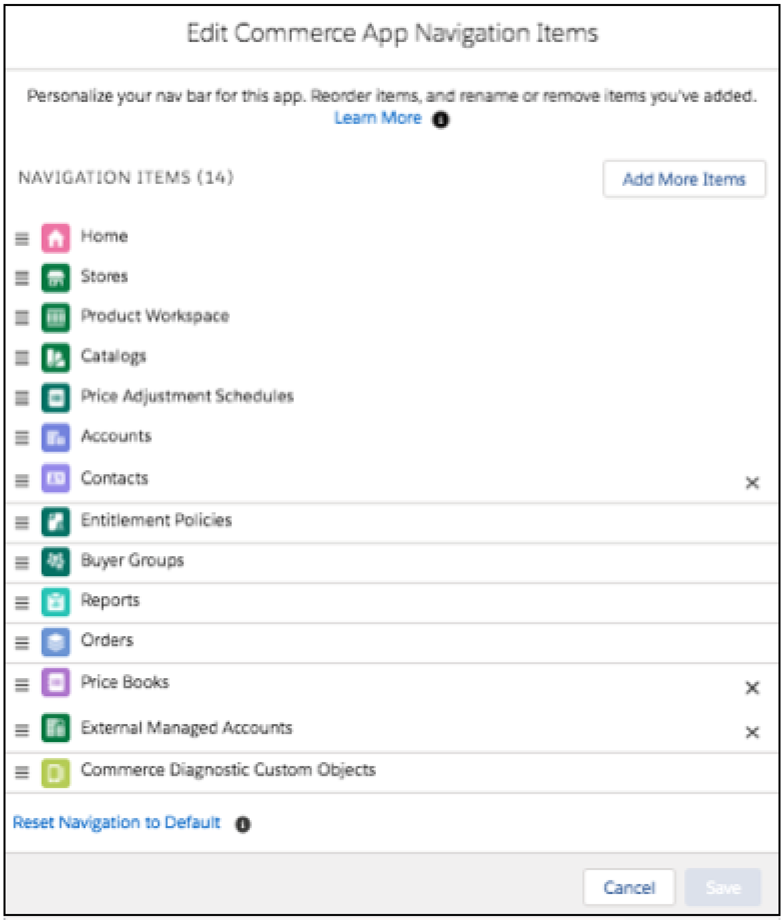
Customize the Commerce App

Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

1. Go to the app launcher, and select **Commerce**.



2. Add more objects to the Commerce App navigation menu.
   a. Click the dropdown arrow, and select **Edit**.
   b. Click **Add More Items** and add any objects that your merchandisers and commerce admins manage that aren't already included on the list.



   c. Save your changes.

3. Set additional tabs to be on by default.

   We recommend that you set the Commerce Setup and Price Book tabs to be on by default.

   a. Go to **Setup** > **Home** > **Users** > **Profiles**.

   b. Select the System Administrator profile, and click **Edit**.

   c. Set tabs, for example Commerce Setup and Price Book to **default on**.

   d. Save your changes.

Multifactor Authentication

Multifactor authentication (MFA) increases protection for user accounts against common threats like phishing attacks, credential stuffing, and account takeovers. As a Salesforce admin, amplify your security by requiring an extra level of authentication at login. You can also require MFA when a user performs certain actions, such as attempting to view reports or access a connected app.

For information about setting up MFA, see Multi-Factor Authentication.

Prevent Third-Party Attacks on Your Store

If you want to add third-party scripts and components to your store, make it impossible for these scripts and components to directly access the session ID (SID) cookie using JavaScript. To prevent attackers from hijacking your session or initiating cross-site scripting, enable the Require HttpOnly setting. This setting applies to your entire Salesforce org.

1. From Setup, in the Quick Find box, enter `Sessions Settings`, and then select **Session Settings**.
2. In the Session Settings section, enable **Require HttpOnly attribute**.
3. Click **Save**.

Configure a Custom Domain and CDN

Every B2B and B2C store, except a store created in a Developer Edition org or a B2B store created with an Aura template, must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) partner. A custom domain and corresponding CDN are optional for a B2B store created with the Aura template, but we recommend them if broad access and high security are required.

To serve your custom domain with the Salesforce CDN, your domain name must be a subdomain of a top-level domain. For example, if your top-level domain is example.com, your subdomain is something like store.example.com. Your top-level domain is registered and hosted externally from Salesforce. For more information, see https://help.salesforce.com/s/articleView?id=sf.domain_mgmt.htm

1. Review the considerations for the Salesforce CDN.
2. Complete the prerequisites for a custom domain and the prerequisites for the Salesforce CDN.
3. Set up a custom domain that uses the Salesforce CDN.

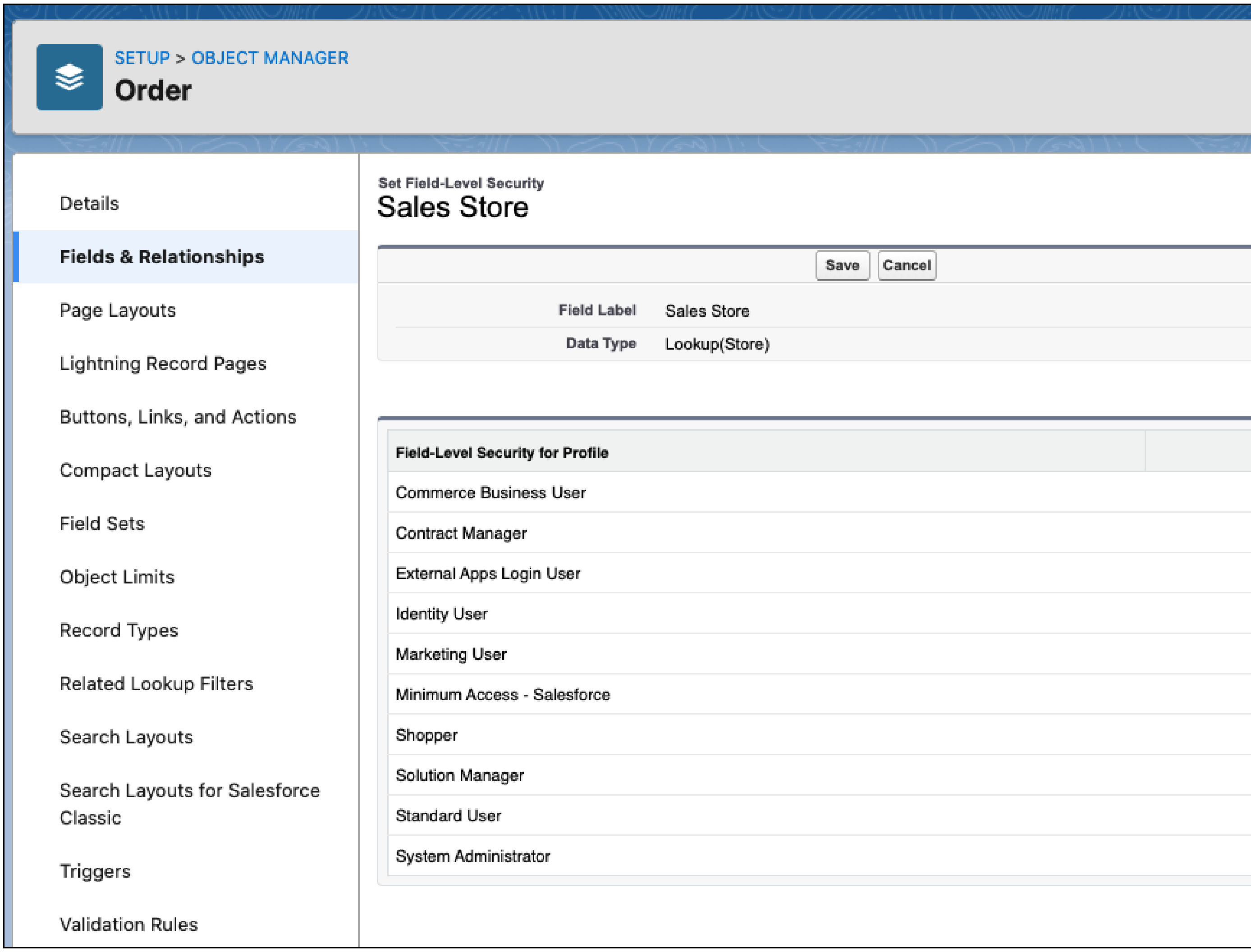
SEE ALSO:

Configure a Custom Domain for Your Experience Cloud Site

Install Commerce Reports

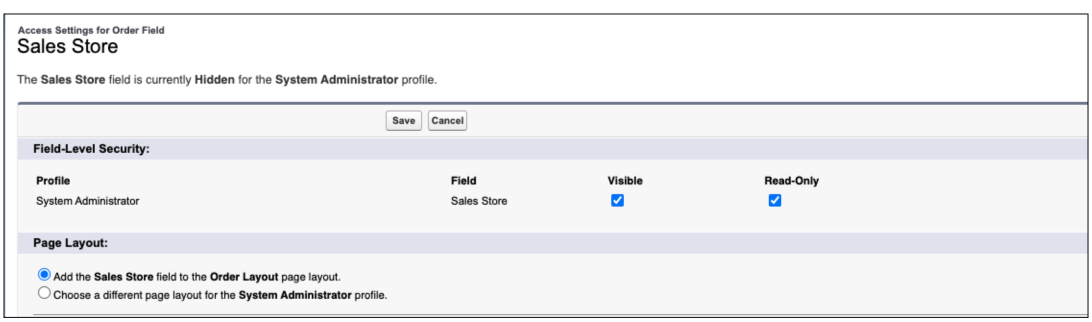
Install commerce reports to track Commerce orders.

1. Set the field-level security for Orders, Sales Store.
   a. From the Object Manager, enter `Order` in the Quick Find box.
   b. Select **Order** > **Fields & Relationships** > **Sales Store**.
   c. Click **Set Field-Level Security**.
   d. Make sure that **Visible** is selected for Commerce Business User and System Administrator.



e. Click **Save**.

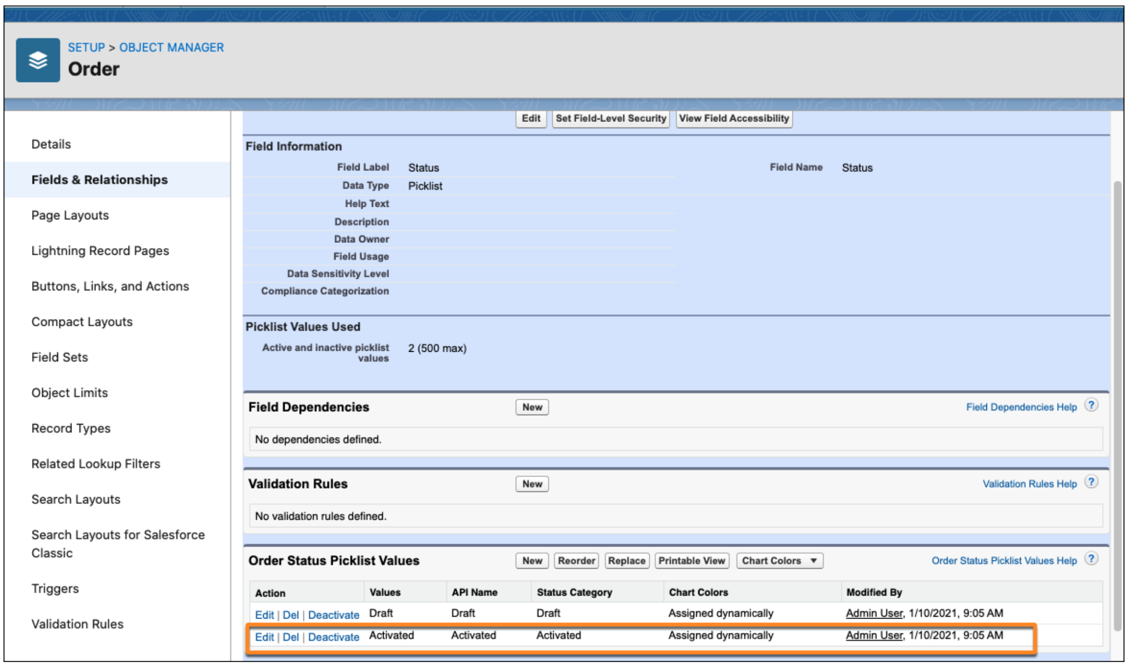
2. Ensure that the Sales Store field is visible to the System Administrator and Commerce Business User and is added to the Order Layout page layout.
   a. Click **View Field Accessibility**, and select **Sales Store** from the dropdown menu.
   b. Next to System Administrator, click **Hidden** and verify that **Visible** is selected next to the System Administrator profile.
   c. Select **Add the Sales Store field to the Order Layout page layout**.



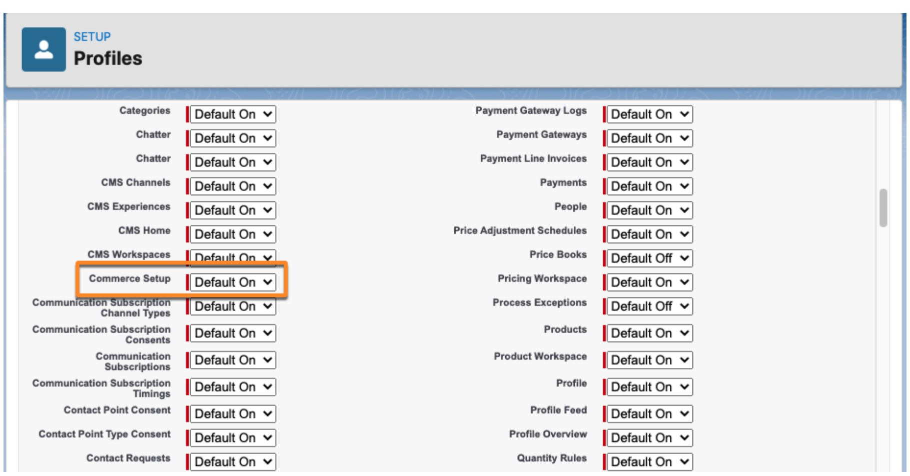
   d. Click **Save**.

   e. Click **View Field Accessibility**, and select **Sales Store** from the dropdown menu.
   f. Next to Commerce Business User, click **Hidden** and verify that **Visible** is selected next to the Commerce Business User profiles.
   g. Click **Save**.

3. Ensure that the Activated picklist value is available for Order Status.
   a. Select **Fields & Relationships** > **Status**.
   b. Under Order Status Picklist Values, confirm that Activated is shown. If the Activated field doesn't exist, click **New** and follow the UI prompts to create it.



4. If you haven't done so already, set the Commerce Setup tab to be on by default.
   a. Go to **Setup** > **Home** > **Users** > **Profiles**.
   b. Select the System Administrator profile, and click **Edit**.
   c. Change the Commerce Setup tab setting to **Default On**.



d. Click **Save**.

5. From the Commerce App navigation menu, select **Commerce Setup** from the dropdown.
6. On the Add Reporting quick link tile, click **Install Reports**.
7. Next to the reports listed on the page, click **Install**. The Commerce report folder is created when a Commerce report is installed.
8. Install all Commerce reports listed on the Commerce Reports page.
9. To view your installed reports, on the Commerce App navigation menu, select **Reports**.

   Tip: If you have multiple stores, you can make a report easier to read by adding a filter or column based on Sales Store: Name.

Next Steps

When you've completed the setup, you can import data and create and configure stores.

For information about getting your org ready to sell globally, see Configure Salesforce for Global Stores.

For information about getting your org ready for asynchronous orders and handling PlaceOrderFailed exceptions, see Preparing Salesforce for Asynchronous Order Processing.

For detailed help, see Salesforce B2B Commerce and D2C Commerce.

To start working with products and stores, see these topics:

- Import Data Globally Using a CSV File
- Store Creation

To set up Salesforce Order Management, see Salesforce Order Management Implementation Guide for B2B and D2C Commerce.

To set up Salesforce Omnichannel Inventory, see Salesforce Omnichannel Inventory Implementation Guide.

For links to training and other resources, see Commerce Resources.