



AC B2B Commerce Recurring Orders Component User Guide

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Overview

The **AC B2B Commerce Recurring Order** is an extension to Salesforce B2B Commerce functionality that allows B2B Customers to develop more consistent and predictable buying patterns for their business buyers.

B2B customer's business buyers shouldn't have to go through the burden of manually creating an order every time they restock anymore, especially if it's the same or similar order each time.

Our solution can help them automate Order Subscriptions and make adjustments or alterations later if needed. Our app also frees up time for B2B customers and ensures that their store or outlet is consistently stocked with the correct products.

Main features:

- Scheduled Subscription
- Create recurring orders right from the cart
- Edit or cancel your subscription at any time
- Salesforce native app
- All Frequency Options: scheduled daily, weekly, monthly subscriptions
- Intuitive Frequency Selection

Installation

Prerequisites:

- Digital Experiences should be enabled in setup:

(Setup – Quick Find / Search box – Digital Experiences – Settings - Enable Digital Experiences – Domain name – Save)

The screenshot shows the Salesforce Setup interface. On the left, a search bar contains 'Digital Experiences'. Below it, a sidebar lists 'Feature Settings', 'Digital Experiences', and 'Settings' (which is highlighted). A message states: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Settings' with a gear icon. Below this is the 'Experiences' section, which includes a 'Save' button at the top right. The 'Enable Digital Experiences' section contains a checkbox labeled 'Enable Digital Experiences' which is checked and highlighted with a red box. Below this is the 'Select a domain name' section, which includes an important note: 'Important: The domain name is used in all of your digital experiences and can't be changed after you save it.' A diagram shows a 'Sample Domain Name' 'MyCompany.eu40.force.com' branching into three 'Sample Experience URLs': 'MyCompany.eu40.force.com/customers', 'MyCompany.eu40.force.com/developers', and 'MyCompany.eu40.force.com/partners'. At the bottom, a 'Domain Name' field contains 'advancedcommunities' followed by '-developer-edition.eu40.force.com', and a 'Check Availability' button. A 'Save' button is at the bottom right.

- At least one SF Community should be configured
- Internal org domain required (Setup – Company Settings – My Domain)

Install **AC B2B Commerce Recurring Orders** from the [AppExchange](#) or use the direct installation link if you have one.

Configuration

Set up Permissions

AC B2B Commerce Recurring Orders component comes with custom objects and fields. In order for the component to function properly, you need to provide appropriate access to these objects and their fields.

You can provide access in two ways:

- Assign a user an appropriate permission set that comes with the package:

BBORM Admin User for admins

BBORM Buyer User for buyers

- set up User Profile according to the permissions below:

Organization-Wide Defaults (Default External Access):

Recurring Order – Private

Reorder Log - Public Read Only

Tabs permissions (admin):

Recurring Orders - Default On

Reorder Logs - Default On

Objects and Fields	Admin	User
Recurring Orders	Read, Create, Edit, Delete	Read, Create, Edit
Cart	Read, Edit	Read, Edit
Is Marked for Reorder	Read, Edit	Read, Edit
Latest Log	Read, Edit	Read
Next Recurring Date	Read, Edit	Read, Edit
Recurring Order Name	Read	Read
Recurring Schedule	Read, Edit	Read, Edit
Status	Read, Edit	Read, Edit
Reorder Logs	Read, Create, Edit, Delete	Read
Cart	Read, Edit	Read
Log Name	Read	Read
Message	Read, Edit	Read
Recurring Order	Read, Edit	Read
Type	Read, Edit	Read

Apex Classes Access

According to the Salesforce access restriction to @AuraEnabled Apex Methods for Guest and Portal Users, provide access for external users (including guests) to the following Apex Classes:

breca.bborm_CartService
breca.bborm_RecurringOrdersService

To set Apex class security from a profile:

- From Setup, enter Profiles in the Quick Find box, then select **Profiles**.

We recommend using the Enhanced Profile User Interface to see the full list of available Apex classes!

- Select a profile.
- On the Apex Class Access page or related list, click **Edit**.
- Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.

The screenshot displays the 'Apex Class Access' configuration window. It features two main panels: 'Available Apex Classes' on the left and 'Enabled Apex Classes' on the right. The 'Available' panel lists 18 classes, including B2BAuthorizeTokenizedPayment, B2BCheckInventorySample, B2BDeliverySample, B2BGetInfo, B2BPaymentController, B2BPricingSample, B2BTaxSample, B2BUtills, and ChangePasswordController. The 'Enabled' panel currently lists two classes: breca.bborm_CartService and breca.bborm_RecurringOrdersService, which are highlighted in blue. Between the panels are 'Add' and 'Remove' buttons with arrow icons. At the top right of the window are 'Save' and 'Close' buttons.

Org Setup

Set Up Checkout Flow

You need to update your checkout flow. You should already have configured B2B Commerce checkout flow.

- Go to org Setup -> Flows -> Select your checkout flow (For this example we are using Re-entrant Checkout Flow).
- To create recurring orders you need to add the Create Recurring Order subflow step right before the Activate Order subflow step.
- Double click on the Main Decision Hub -> add New Outcome
- Enter this values:
 - Label: Create Recurring Order
 - Outcome API Name: Create_Recurring_Order_Outcome
 - Condition Requirements to Execute Outcome: All Conditions Are Met (AND)
 - Resource: mainCheckoutSession > State
 - Operator: Equals
 - Value: Create Recurring Order
 - Click Done.

Edit Decision

Main Decision Hub (Main_Decision_Hub)

The Main Decision Hub is the primary driver of the checkout flow.

It uses the following logic...

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

OUTCOME DETAILS

*Label: Create Recurring Order

*Outcome API Name: Create_Recurring_Order_Outcome

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: mainCheckoutSession > State

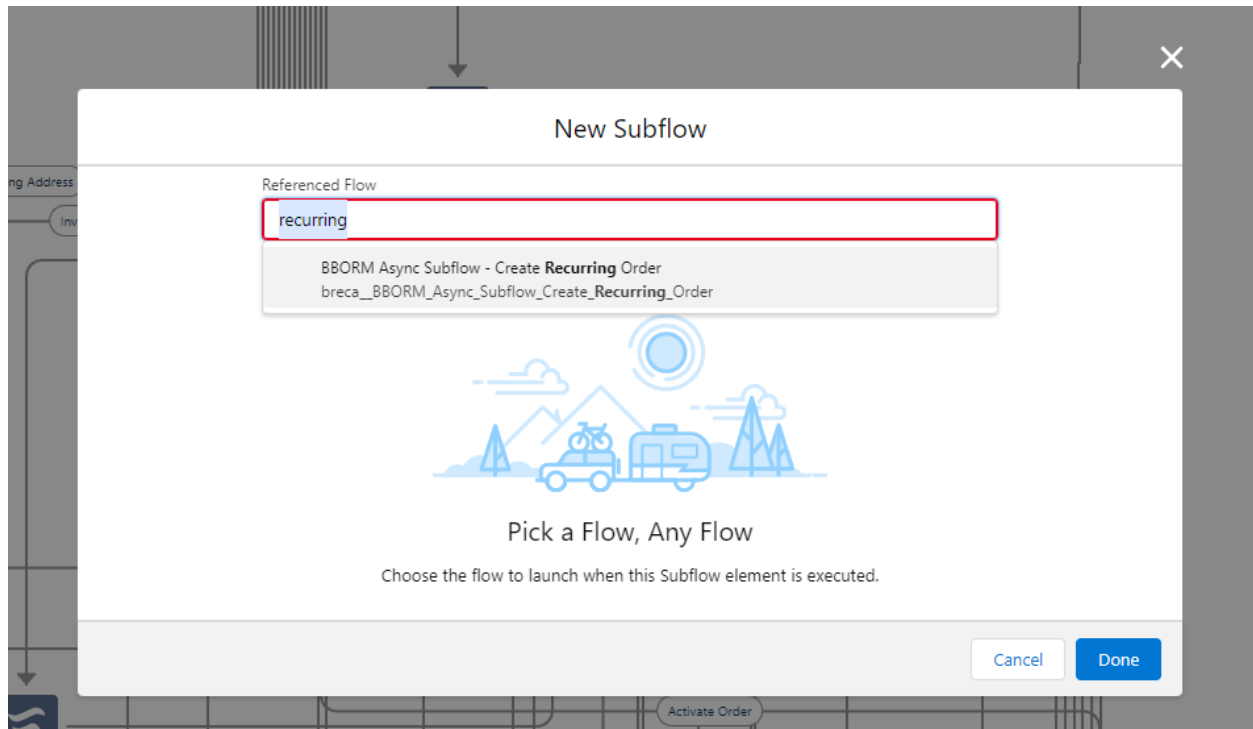
Operator: Equals

Value: Create Recurring Order

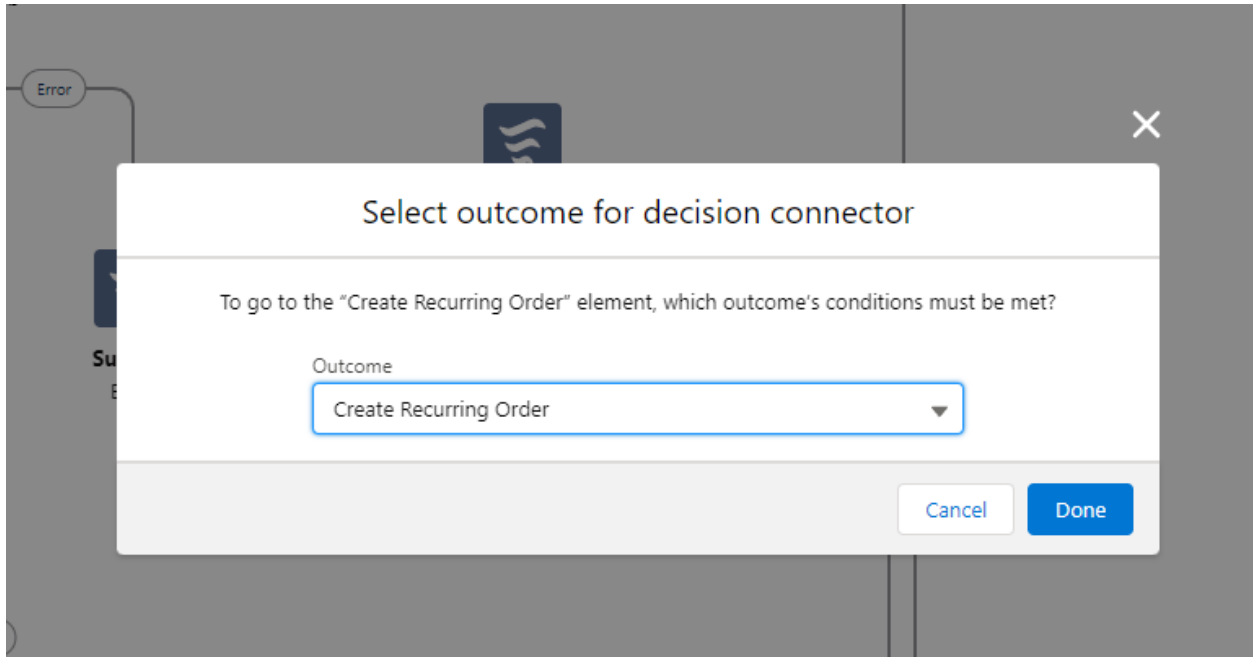
+ Add Condition

Default Outcome

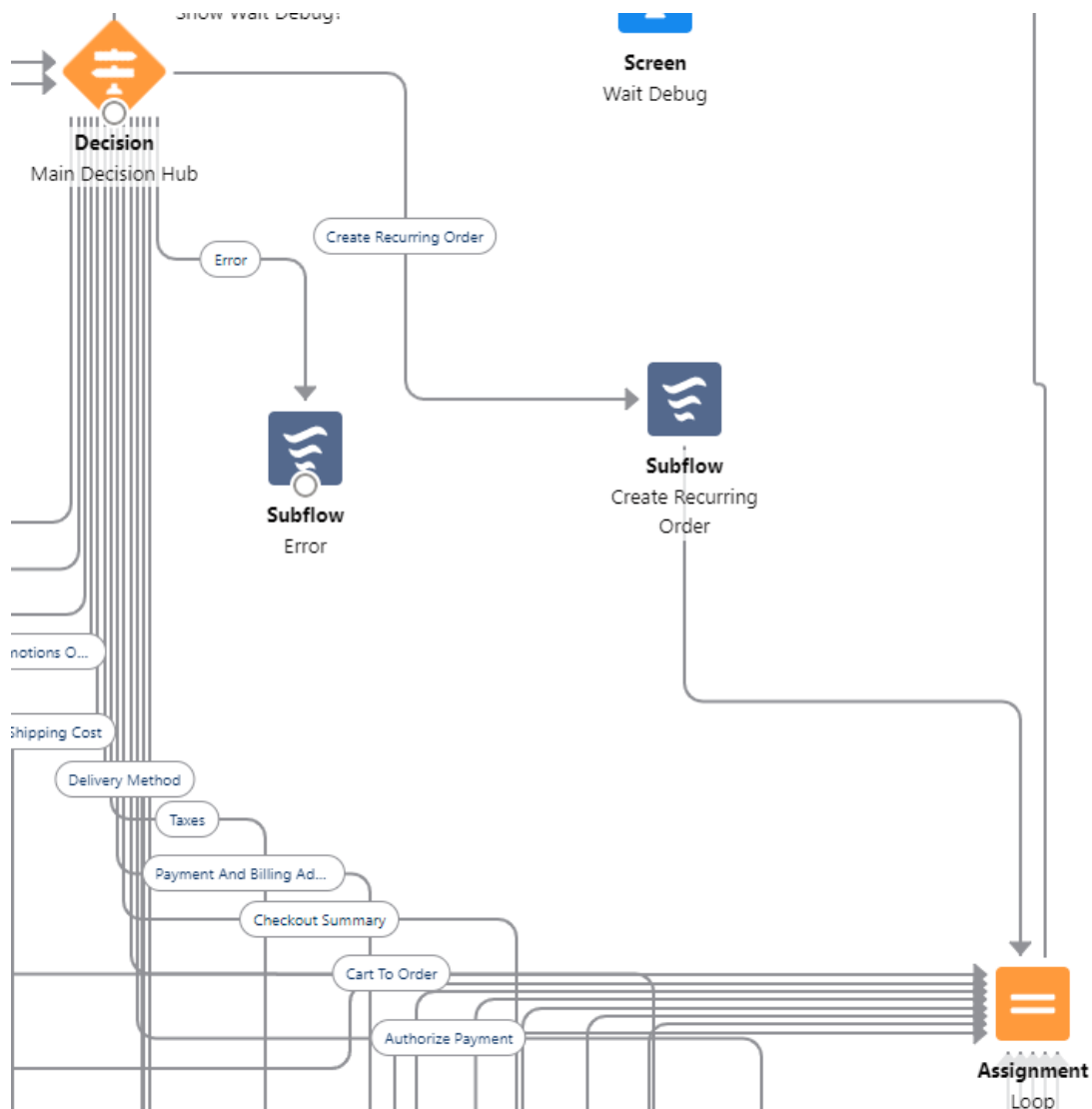
- From the elements page drag and drop the Subflow element.
- Type “recurring” and select the BBORM Async Subflow -> Create Recurring Order.



- Enter these values:
 - Label: Create Recurring Order
 - Api Name: Create_Recurring_Order
- Click on the Don't Include switcher for all variables and enter these values for inputs:
 - cartId: {!cartId}
 - checkoutSession: {!mainCheckoutSession}
 - currentState: {!mainCheckoutSession.State}
 - nextState: Activate Order
- Click Done.
- From the Main Decision Hub connect the arrow to Create Recurring Order element -> Select Create Recurring Order for the outcome -> Click Done.



- From the Create Recurring Order element connect the arrow to the Assignment Loop.



You can move around the Create Recurring Order element if you want.

To include the Create Recurring Order step in the flow order:

- Set the “nextState” value of the step prior to Activate Order to “Create Recurring Order” value.

Use values from the master flow to set the inputs for the "(V2 Summer 2021) Subflow - Authorize Payment" flow. By default, the master flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the master flow to store individual outputs from the "(V2 Summer 2021) Subflow - Authorize Payment" flow.

Authorize Payment (Authorize_Payment)

Set Input Values

A_a cartId	{!cartId}	☒ Include
(x) checkoutSession	{!mainCheckoutSession}	☒ Include
A_a currentState	{!mainCheckoutSession.State}	☒ Include
A_a nextState	Create Recurring Order	☒ Include

☐ Manually assign variables

Cancel Done

- Save and activate the flow.

Now you can publish experience changes and check the reordering process.

Reordering Flow Customization

In order to customize reordering flow, you should clone "BBORM Async Repeat Order Flow".

- Open flow in the flow editor -> click "Save as".

Save as a new flow

Create a flow using this template as a starting point.

* Flow Label: Custom Repeat Order Flow

* Flow API Name: Custom_Repeat_Order_Flow

Description

[Show Advanced](#)

[Cancel](#) [Save](#)

- After making changes -> click Save -> activate the flow.
- Go to custom metadata with API name "breca_BBORM_Settings_mdt"
- Edit the "General" metadata record -> enter your cloned flow name into the "Repeat Order Flow Name" field.

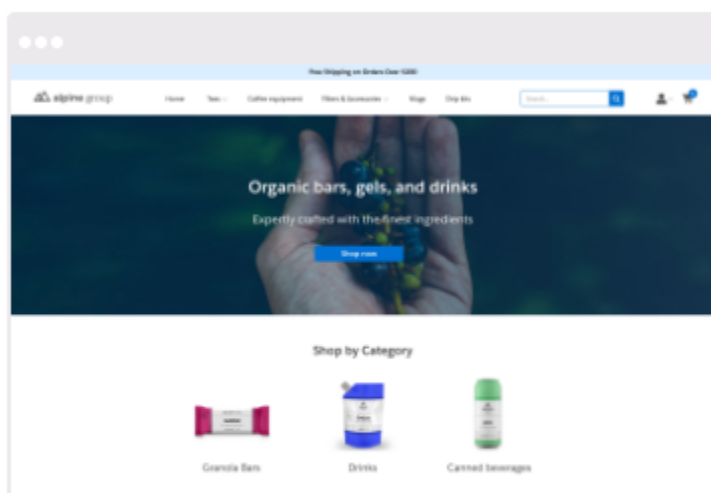
Experience Site Setup

AC B2B Commerce Recurring Orders package comes with the following lightning components:

- **Bborm Cart Recurring Checkbox** - allows to mark an order as recurring.
- **Bborm Recurring Order Details** - displays the details of the recurring orders.
- **Bborm Recurring Orders List** - displays the list of recurring orders.

Before you set up **AC B2B Order Management** you need to have already configured B2B Commerce for Lightning Experience and have a store.

Create Experience Site using B2B Commerce template



Live search • Product filtering •
Einstein Product Recommendations •

Create a responsive ecommerce store that provides easy
customization of store layout and template, configure...

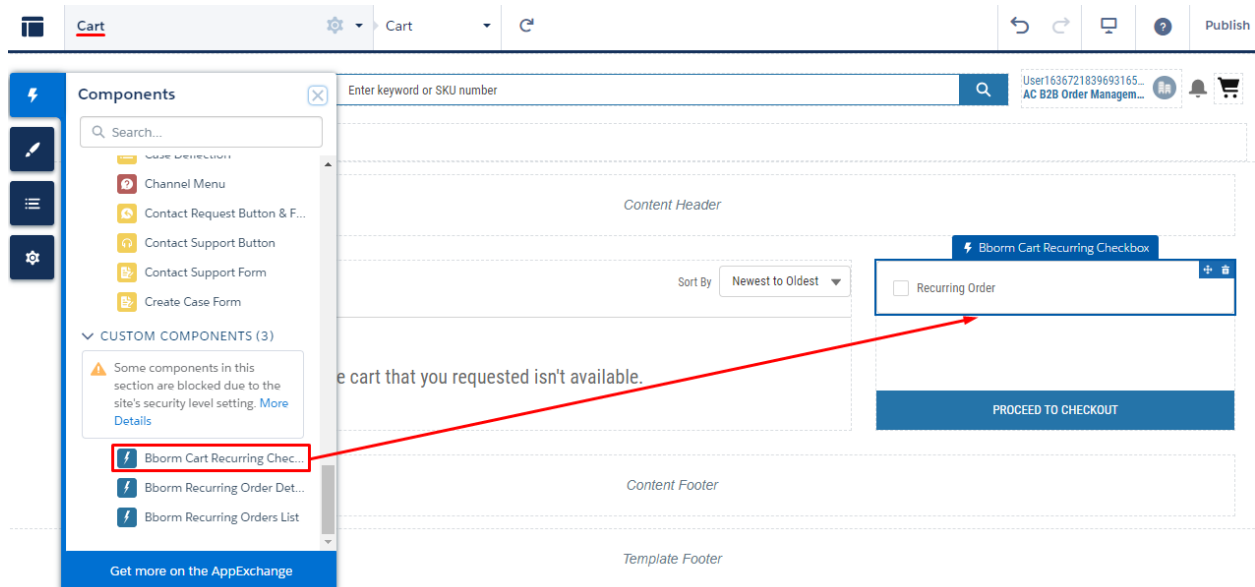
Set up Cart Page

Go to the Experience Builder and navigate to the Cart page.

Add the following component to the page:

Bborm Cart Recurring Checkbox Component

From components panel select Bborm Cart Recurring Checkbox and drop it under Proceed to Checkout button.



Set up Recurring Orders List Page

In Experience Builder create new Object page and add it to the navigation menu.

To create an Object page, go to:

- Pages menu – New page – Object page.
- Choose object Recurring Order – Create – Publish your changes.

New Object Pages

Select an object to create the detail, list, and related list pages associated with it.

Recommendation

RecordAction

Recurring Order

Refund

Refund Line Payment

Related Problem and Incident

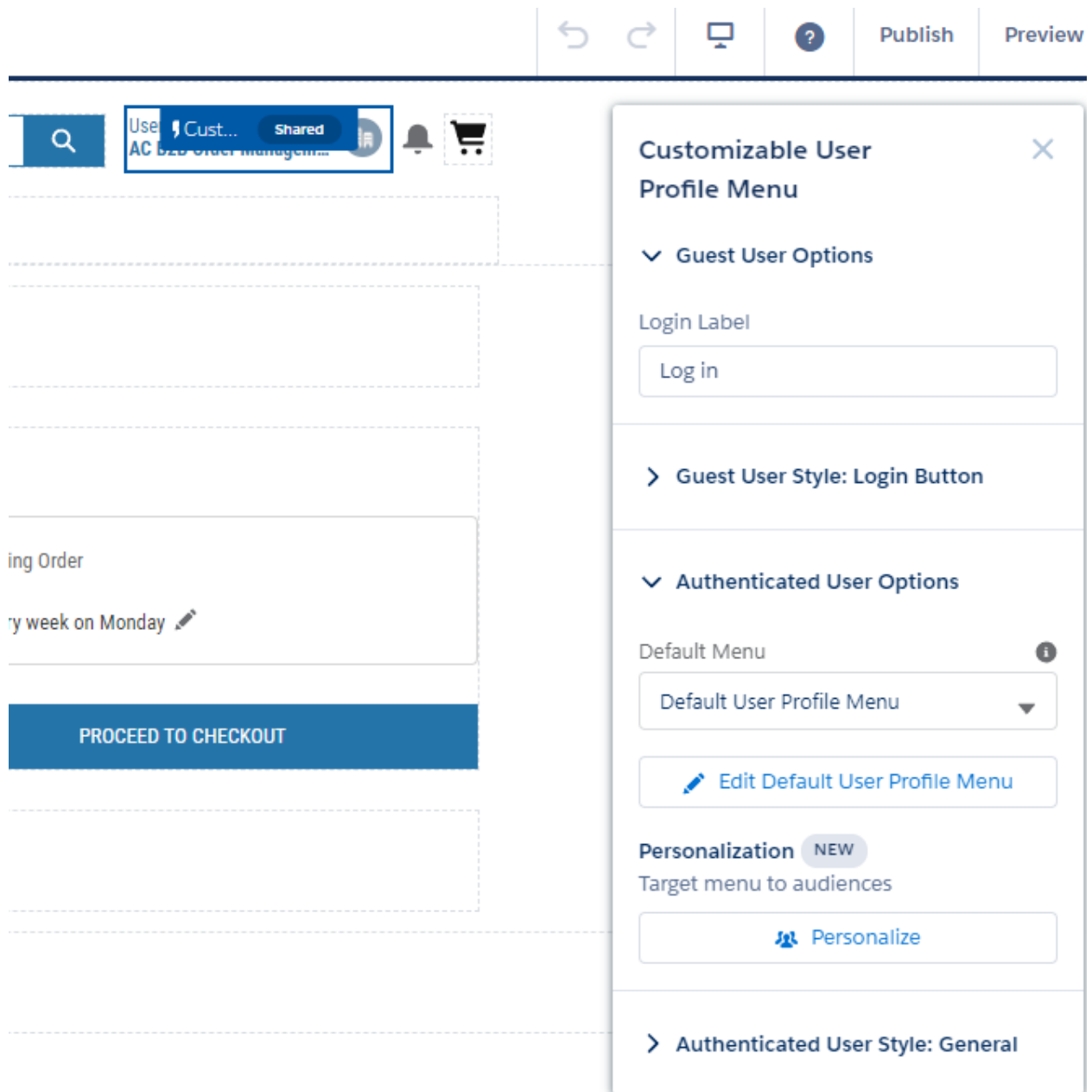
Reorder Log

Report

← Back

Create

- Click on the Customizable Profile User Menu at the top of the page, near the Cart button.



Expand the Authenticated User Options and click on the Edit Default User Profile Menu button:

- Click Add Menu Item
- Enter these values: Name: Recurring Orders; Type: Site Page; Page: Recurring Order List
- URL: /recurring-order/breca_Recurring_Order_c/Default

- Click Save Menu.

Add the following component to the page:

Bborm Recurring Orders List Component

- Navigate to the Recurring Order List page. Remove all components from the content region.
- Click on the components tab to find the **Bborm Recurring Orders List** component in the drop-down list, and drag it to the content region.

The screenshot displays the 'Recurring Order List' page. At the top, there's a navigation bar with 'Recurring Order List' and a search bar. Below this is a sidebar with icons for Home, Beans, Machines, Grinders, and Coffee Accessories. The main content area features a table titled 'Bborm Recurring Orders List' with the following data:

#	Order Number	Order Date	Shipping Address	Created by	Frequency	Next Order Date	Total	Status	Account
1	RO-00000014	25/03/2022, 10:46	333 Seymour Street (Shipping), Vancouver, BC, V6B 5A7, Canada	youremail	Days	28/03/2022	£2,700.27	Active	buyer@scratch.org JITUserAccount
2	RO-00000007	15/12/2021, 13:18	333 Seymour Street (Shipping), Vancouver, BC, V6B 5A7, Canada	youremail	Months	20/04/2022	£40,734.56	Active	buyer@scratch.org JITUserAccount
3	RO-00000008	15/12/2021, 14:18	333 Seymour Street (Shipping), Vancouver, BC, V6B 5A7, Canada	youremail	Months	20/04/2022	£29,110.04	Active	buyer@scratch.org JITUserAccount
4	RO-00000012	23/02/2022, 12:06	333 Seymour Street (Shipping), Vancouver, BC, V6B 5A7, Canada	youremail	Months	30/03/2022	£399.95	Active	buyer@scratch.org JITUserAccount

Set up Recurring Order Details Page

Add the following component to the page:

Bborm Recurring Order Details Page

- Navigate to the Recurring Order Detail page. Remove all components from the content region.
- Click on the components tab to find the **Bborm Recurring Order Details** component in the drop-down list, and drag it to the content region.

Recurring Order Detail

Recurring Order Detail

↶

↷

🖨

?

Publish

⚡

🔍

⚙️

☰

⚙️

Enter keyword or SKU number

User1636721839693165...

AC B2B Order Managem...

🔔

🛒

HOME

BEANS

MACHINES

GRINDERS

COFFEE ACCESSORIES

Content Header

Bborm Recurring Order Details

📄

Recurring Order: RO-00000012

✎

Edit

🗑

Cancel O...

⛶

Details

Account: buyer@scratch.org/JITUserAccount

Owner Name: youremail

Schedule: Repeat every month on the last Wednesday

Next Order Date: 2022-03-30

Shipping Address:

333 Seymour Street (Shipping)

Vancouver

BC

V6B 5A7

Canada

Payment Method: Purchase Order ()

The Infuser

Product SKU	Q85YQ2	QTY	1	£319.95
Price per Unit	£319.95			



Ceramic Coffee Grinder

Product SKU	CERCG-1	QTY	1	£80.00
Price per Unit	£80.00			

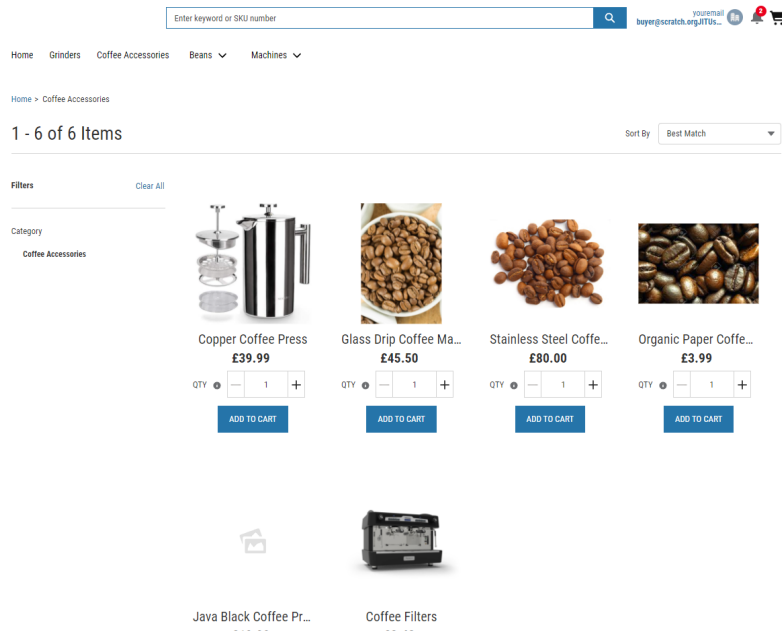
18

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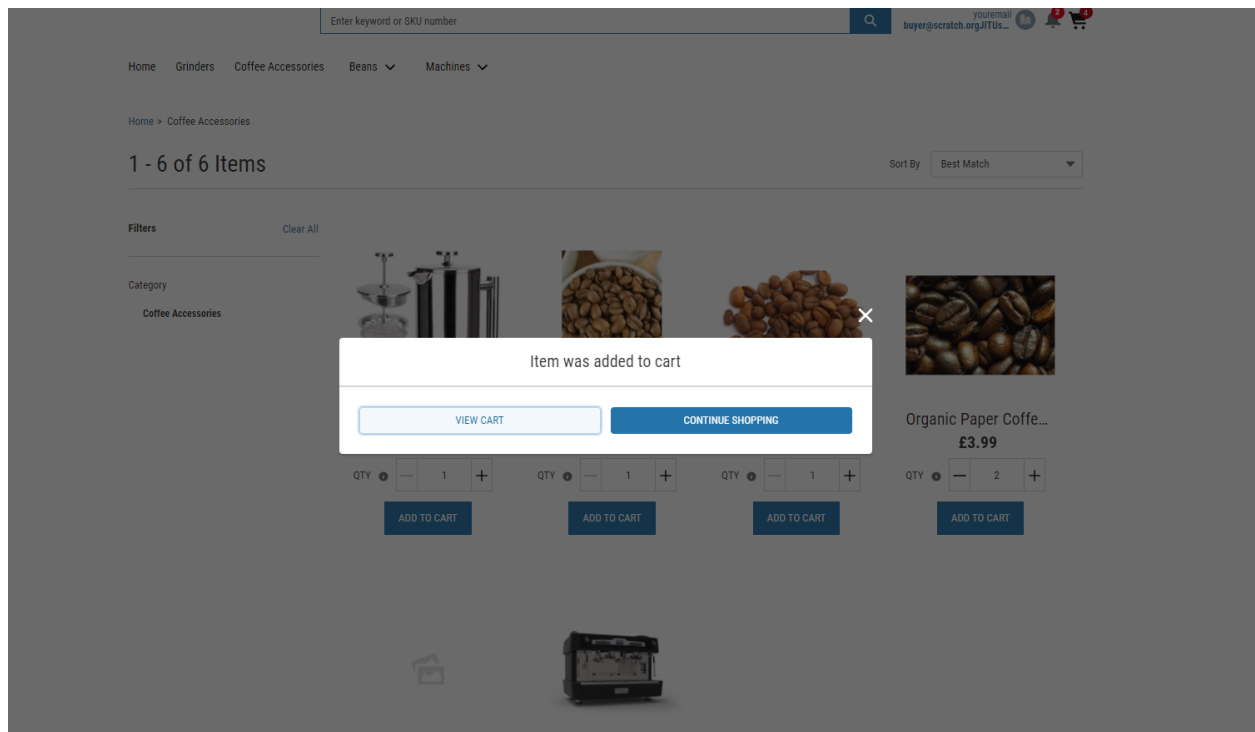
Use Case

Reordering process

- Login to the Experience as a user -> Go to Coffee Accessories.



- Add a few items to your cart.



- Open the cart either by clicking on the View Cart or a cart icon in the top right corner.

youremail buyer@scratch.org.JITUs...

[Home](#)
[Grinders](#)
[Coffee Accessories](#)
[Beans](#)
[Machines](#)

Cart (4)

Sort By Newest to Oldest

	Copper Coffee Press SKU# CP-2 Price per unit £39.99	QTY 1	£39.99	×
	Organic Paper Coffee Filters SKU# COF-FIL Price per unit £3.99	QTY 2	£7.98	×
	Glass Drip Coffee Maker SKU# GDG-1 Price per unit £45.50	QTY 1	£45.50	×

[Add All to List](#)
[Clear Cart](#)

Cart Total
Total **£93.47**

☐ Recurring Order

[PROCEED TO CHECKOUT](#)

- Click on the recurring order checkbox.

Sort By

Newest to Oldest

£39.99

×

£7.98

×

£45.50

×

Cart Total

Total£93.47

☒ Recurring Order

Repeat every 1 months on the first Tuesday

PROCEED TO CHECKOUT

- Click on the pencil to edit the recurring schedule.

Sort By Newest to Oldest

Coffee Press

Cart Total

Total X

Recurring Order Schedule

Schedule

Repeat every 2 months on the last Friday

Repeat every

2 months

Week day

Sun Mon Tue Wed Thu **Fri** Sat

Repeat on

Last Friday

Cancel Accept

- Click Accept -> click Proceed To Checkout.

Continue clicking the Next button until you finish the checkout. Some steps may take a while to complete.

After checkout you should see the Thank You page.



youremail
buyer@scratch.orgJITUS...



HomeGrindersCoffee AccessoriesBeans ▾Machines ▾

Thanks for shopping with us!

Order Number: 00000104

Your order is complete.

Continue Shopping

View My Order

DELIVERY METHOD (ESTIMATES ARE IN BUSINESS DAYS)

Test Carrier 2

Order Delivery Method2

CHECKOUT SUMMARY

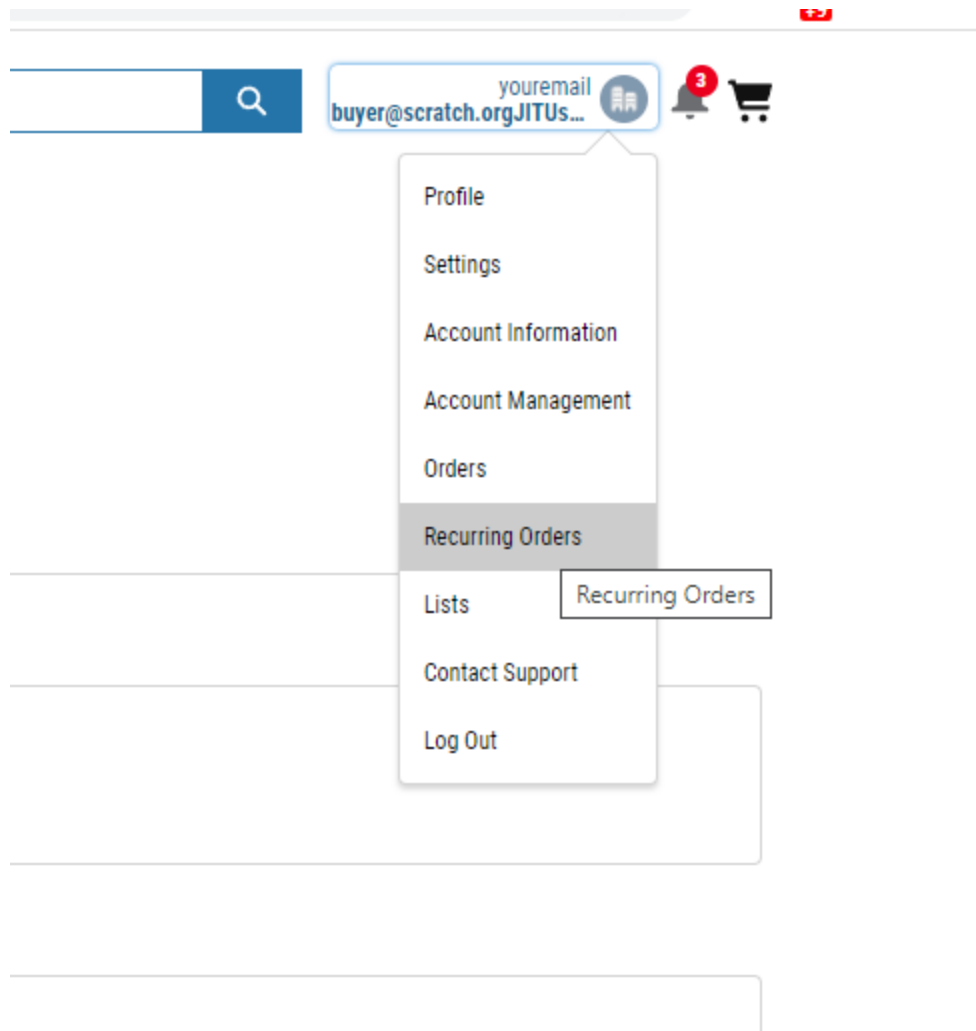
Subtotal:	£93.47
Estimated Shipping:	£47.97
Estimated Tax:	£11.32
Total:	£152.76

SHIP TO

Default Shipping

333 Seymour Street (Shipping)
Vancouver
BC
V6B 5A7
Canada

- Click on the Your Email in the top right corner -> select Recurring Orders menu item.



- Choose the All list view and select recurring order with the latest number in the list.

Home Grinders Coffee Accessories Beans Machines

Recurring Orders
All

3 items

LIST VIEWS

- All (Pinned list)
- Recently Viewed

Search this list...

New Printable View

1

2 RO-00000015

3 RO-00000016

This should navigate you to the recurring order with the items you selected for your last order.

Home Grinders Coffee Accessories Beans Machines

Recurring Order: RO-00000016

Edit Pause Cancel

Details

Account: buyer@scratch.org.JITUserAccount
Owner Name: CreatedViaQuickstart

Schedule: Repeat every 2 months on the last Friday

Shipping Address:
333 Seymour Street (Shipping)
Vancouver
BC
V6B 5A7
Canada

Cart Total:

Total: £93.47

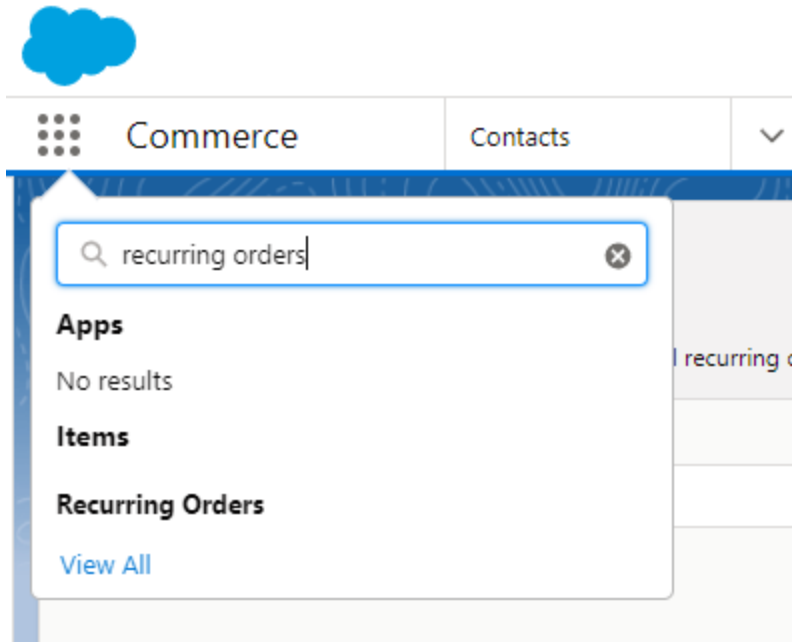
Glass Drip Coffee Maker
Product SKU:GDG-1
Quantity:1
Total price:£45.50

Organic Paper Coffee Filters
Product SKU:COF-FIL
Quantity:2
Total price:£7.98

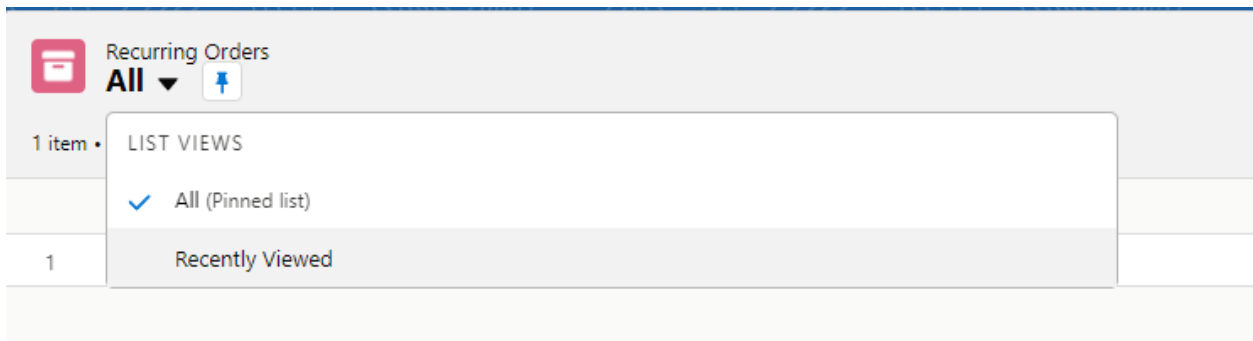
Copper Coffee Press
Product SKU:CP-2
Quantity:1
Total price:£39.99

Now you can check the reordering process:

- Go to Salesforce internal -> App Launcher -> type "Recurring Orders"



- Select Recurring Orders list item -> select All list view.



- Click on the last recurring order. Click Edit.

Edit RO-00000002

Recurring Order Name
RO-00000002

Recurring Schedule
months;1;Monday;last

* Cart
Cart

Next Recurring Date
27/12/2021

* Status
Active

Created By
CreatedViaQuickstart, 29/11/2021, 06:51

Last Modified By
CreatedViaQuickstart, 29/11/2021, 06:51

Cancel Save & New Save

- Click on the Next Recurring Date input -> select Today in the date input selector -> click Save.

×

Edit RO-00000002

Recurring Order Name

RO-00000002

Recurring Schedule

months;1;Monday;last

* Cart

Cart

×

Next Recurring Date

29/11/2021

↶

* Status

Active

Created By

CreatedViaQuickstart

Last Modified By

CreatedViaQuickstart, 29/11/2021, 06:51

Save & New

Save

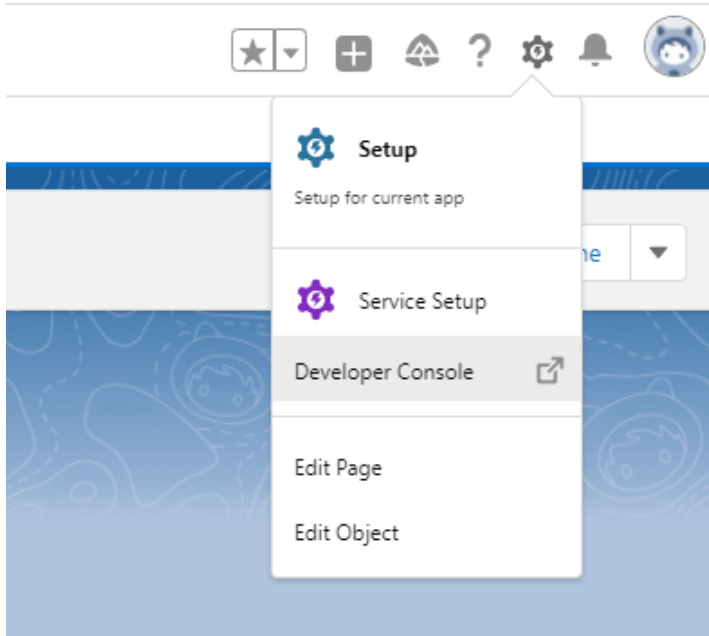
November

2021

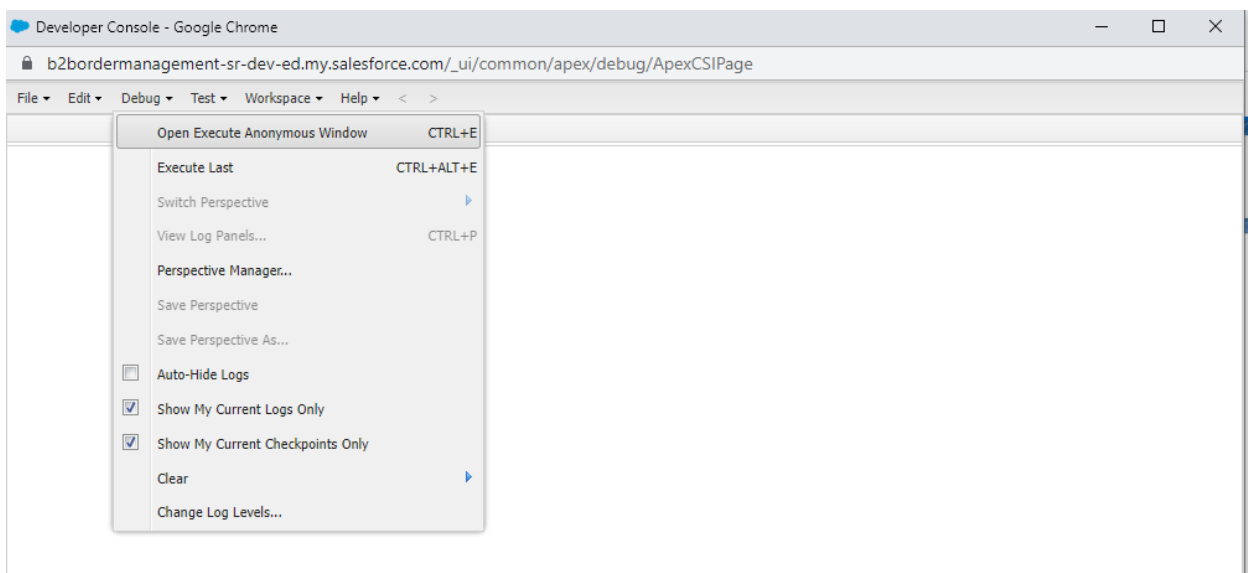
Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Today

- At the top right click on the gear button and select the developer console.



- At the top select Debug -> Open Execute Anonymous Window.



- In the Enter Apex Code section paste this code:

```
System.scheduleBatch(new breca.bborm_FindReordersBatch(), 'BbormFindReorders-'  
+ System.currentTimeMillis(), 1);
```

- Click execute. This will schedule the reordering job to run once in 1 minute after now. This is considered as a test run to confirm that reordering is working properly.
- To schedule the reordering job daily, use this code instead:

```
System.schedule('BbormFindReorders-' + System.currentTimeMillis(), '0 0 0 * * ? *', new breca.bborm_FindReordersSchedulable());
```

This will schedule the reordering job to run every day at 12 am.

You can close the developer console now. Reordering process may take around 15 minutes.

After this you can check if there were no errors during the execution:

- Go to Salesforce Setup->enter Jobs ->select Apex Jobs.

Apex Jobs

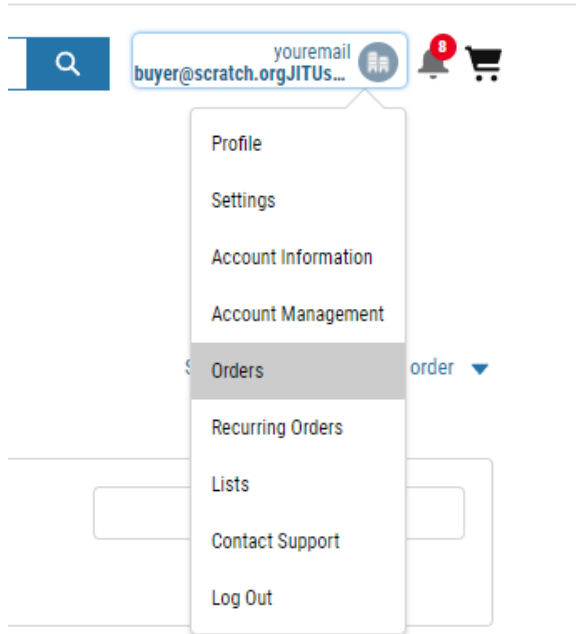
Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: All [Create New View](#)

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class
	29/11/2021, 07:21	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:21	bborm_ProcessReordersBatch
	29/11/2021, 07:19	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:19	bborm_ProcessReordersBatch
	29/11/2021, 07:16	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:16	bborm_ProcessReordersBatch
	29/11/2021, 07:14	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:14	bborm_ProcessReordersBatch
	29/11/2021, 07:12	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:12	bborm_ProcessReordersBatch
	29/11/2021, 07:10	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:10	bborm_ProcessReordersBatch
	29/11/2021, 07:08	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:08	bborm_ProcessReordersBatch
	29/11/2021, 07:07	Batch Apex	Completed		1	1	0	Qoyata_Vladimir	29/11/2021, 07:07	bborm_FindReordersBatch

There should be no text in the Status Detail column for classes **bborm_ProcessReordersBatch** and **bborm_FindReordersBatch** for today's submitted date.

Now you can go to the Experience site and check if an order has been created.



My Orders

Filter by date: Sort items by most recent order ▼

9 Items

Order Summary Number: 00000109	Ordered Date: 29/11/2021, 00:16	Status: Created	Total: £154.81	START REORDER
				View Details

My Order: 00000109

START REORDER

Details

Ordered Date: 29/11/2021, 00:16
Account: buyer@scratch.orgJITUserAccount
Owner Name: CreatedViaQuickstart

Totals

Subtotal:	£95.37
Shipping:	£47.97
Tax:	£11.47
Total:	£154.81

✓ Ship To: 333 Seymour Street (Shipping) Vancouver BC V6B 5A7 Canada

Name: Order Delivery Method2

Pretax Total: £47.97



Organic Paper Coffee Filters

Product Code: COF-FIL

Product Sku: COF-FIL

Quantity: 3

Total with Tax: £12.93



Copper Coffee Press

Product Code: CP-2

Product Sku: CP-2

Quantity: 2

Total with Tax: £86.38



Coffee Filters

Product Code: CF-1

Product Sku: CF-1

Quantity: 1

Total with Tax: £3.69

If the reordering process fails it will mark associated Recurring Order's status as "Failed" and assign the Latest Log field.

After solving the issue with a failed Recurring Order, in order to resume reordering for it the manager or admin user will have to manually update Status field to "Active" and set the Next Recurring Date.

Currently there is a limit on reordering for users per script run. The script **bborm_FindReordersBatch** looks for a maximum of 10 recurring orders per user.

We expect you to run this script daily by scheduling the batch job in Salesforce Setup. Each reordering process for single recurring order runs separately and uses around 11 asynchronous requests.

Get In Touch

AC B2B Commerce Recurring Orders is created and maintained by **AdvancedCommunities.com** – the Experience Cloud experts.

We specialize in Experience Cloud customization, development and consulting.

Feel free to contact us regarding anything related to Experience Cloud.

<https://advancedcommunities.com>

sales@advancedcommunities.com