



AC Orderpad Component User Guide

Advanced Communities Ltd. registered in England and Wales (No. 6659236) VAT No. 115662818

We Work 30 Churchill Place, Canary Wharf, London E14 5RE United Kingdom

We Work SOMA, 156 2nd Street, San Francisco, CA 94105 USA

sales@advancedcommunities.com +44 20 3051 0075



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Overview

AC Orderpad - an easy-to-use solution that allows creating orders inside Salesforce. Our app provides your agents with functionality to create orders, tracking the staff member who created the order on behalf of the customer.

Main Features:

- Create orders internally in a few clicks
- Customizable Order Flow
- Create orders from the Account or Contact
- Detailed Order Summary
- Reorder capability
- Track all your carts data, their statuses, amounts, etc.



Installation and Configuration

Set up Permissions

The AC Orderpad component comes with custom objects and fields. In order for users to use the package functionality, you need to configure access for them. You can provide access in two ways:

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

We recommend using the permission set provided in a package:

- **BBINO Orderpad User**

The permission set grants access to custom metadata provided by the package, such as application, apex classes, custom fields, etc.

Q permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP
Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play.

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description
Clone	BBINO Orderpad User	Allows access to the AC Orderpad
Clone	Buyer	Allows access to the store. Lets us
Clone	Buyer Manager	Includes all Buyer capabilities, and
Clone	CRM User	Denotes that the user is a Sales Cl
Clone	Commerce Admin	Allow access to commerce admin

- set up User Profile according to the permissions below:

[Org-Wide Defaults](#)

[Sharing Settings](#)

[Apex Classes Access](#)

[Custom Metadata Types](#)

[System Permissions](#)

[Object Permissions and Field-Level Security](#)

[Assigned Apps](#)

[Tab Visibility](#)

Organization-Wide Defaults (Default Internal Access)

Buyer Group - Public Read Only

All other parameters can be set up at the user's discretion.

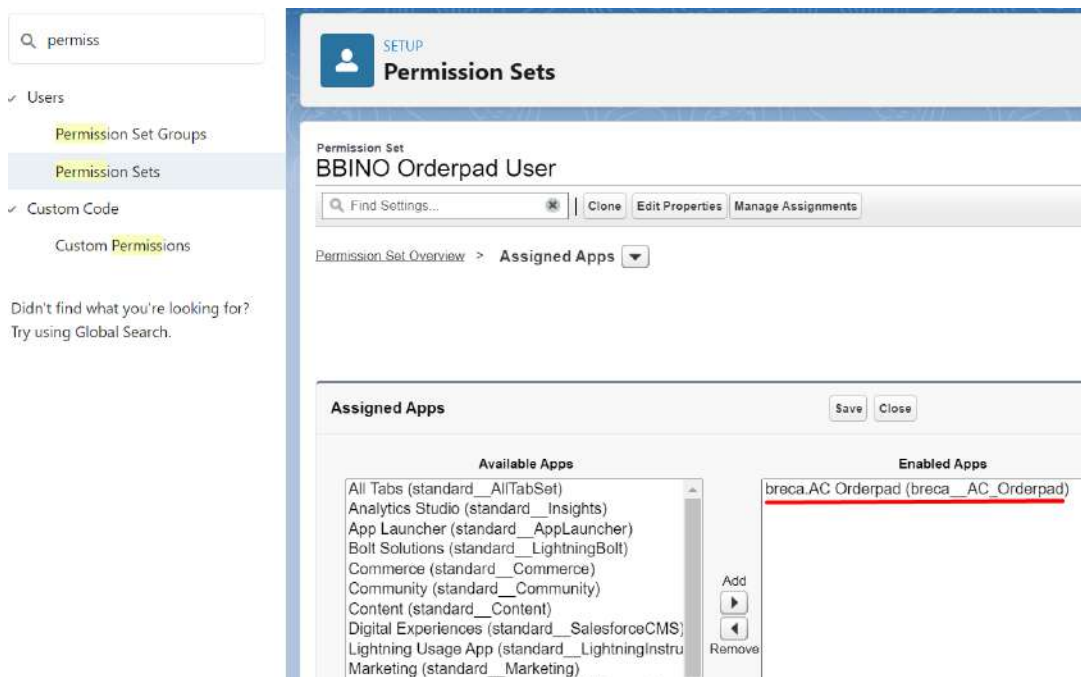
Sharing Settings

To select a store associated with a buyer, the user should have read access to the Buyer Group record that assigns the buyer to that store.

Assign App

To use the AC Orderpad app, you need to grant access to the user:

Open Profile/Permission Set -> Assigned Apps -> Edit -> Move breca.AC Orderpad app to Enabled Apps column



The screenshot shows the Salesforce 'Permission Sets' setup page. On the left is a navigation sidebar with a search bar containing 'permis' and a list of items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Set: BBINO Orderpad User' and includes buttons for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. Below this is a breadcrumb trail 'Permission Set Overview > Assigned Apps' and a dropdown menu for 'Assigned Apps'. The 'Assigned Apps' section contains two columns: 'Available Apps' and 'Enabled Apps'. The 'Available Apps' list includes various standard Salesforce apps like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Commerce, Community, Content, Digital Experiences, Lightning Usage App, and Marketing. The 'Enabled Apps' column currently contains 'breca.AC Orderpad (breca__AC_Orderpad)', which is highlighted with a red line. 'Add' and 'Remove' buttons are located between the two columns.

Tab Visibility

Open Profile/Permission Set -> Object Settings -> Order Creation -> Check the box Visible



Permission Set

BBINO Orderpad User

Clone

Edit Properties

Manage Assignments

[Permission Set Overview](#) > [Object Settings](#) ▼ **Order Creation** ▼

Order Creation

Save

Cancel

Tab Settings

Available	Visible
☒	☒

To allow the user to see the order history, set the tab visibility for the Order Summary object to Default On.

System Permissions

Grant orderpad users the following system permissions:

- B2B Commerce Integrator User
- Manage Experiences
- Run Flows
- Lightning Experience User
- Use Repricing Objects and APIs

Object Permissions and Field-Level Security

Objects and Fields	Orderpad User	Buyer
Accounts	Read	-
Contacts	Read	-
Account Name	Read	-
Contact Point Addresses	Read	-
Stores	Read	-
Buyer Groups	Read	-
Store Buyer Groups	Read	-
Carts	Read, Edit	-
Is Current User Sales Rep For Cart	Read	-
Sales Representative	Read, Edit	-
Products	Read	-
Product Description	Read	-
Product SKU	Read	-
Orders	Read	-
Is Current User Sales Rep For Order	Read	-
Sales Representative	Read	-
Order Summaries	Read	Read
Is Current User Sales Rep For Order	Read	-
Sales Representative	Read	Read
Order Delivery Methods	Read	-
Card Payment Methods	Read	-

Background Operations	Read, Edit	-
-----------------------	------------	---

Apex Classes Access

Provide access for orderpad users to the following Apex Classes:

- breca.bbino_AuthorizeTokenizedPaymentAction
- breca.bbino_CancelCheckoutController
- breca.bbino_CartController
- breca.bbino_CartItemListController
- breca.bbino_CategoryFilterController
- breca.bbino_CheckoutSummaryController
- breca.bbino_CheckoutWaitScreenController
- breca.bbino_CreateOrderActionController
- breca.bbino_DeliveryMethodController
- breca.bbino_PaymentMethodController
- breca.bbion_ShippingAddressController
- breca.bbino_InputBuyerController
- breca.bbino_InputCartItemController
- breca.bbino_OrderCreationController

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.
- In 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**.

Profile

Custom: Support Profile


[Clone](#)
[Delete](#)
[Edit Properties](#)
[Profile Overview](#)

>

[Apex Class Access](#)


Apex Class Access

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

Available Apex Classes

```

breca.bbino_CheckoutWaitScreenControllerTest ▲
breca.bbino_CreateOrderActionControllerTest
breca.bbino_DeliveryMethodControllerTest
breca.bbino_InputBuyerControllerTest
breca.bbino_InputCartItemControllerTest
breca.bbino_LookupSearchResult
breca.bbino_OrderCreationControllerTest
breca.bbino_OrderService
breca.bbino_PaymentMethodControllerTest
breca.bbino_ProductSearchService
breca.bbino_SecurityService
breca.bbino_SecurityServiceTest
breca.bbino_ShippingAddressControllerTest
breca.bbino_TestDataFactory
breca.bbino_TestDefaultValueProvider
  
```

Add



Remove

Enabled Apex Classes

```

breca.bbino_AuthorizeTokenizedPaymentAction ▲
breca.bbino_CancelCheckoutController
breca.bbino_CartController
breca.bbino_CartItemListController
breca.bbino_CategoryFilterController
breca.bbino_CheckoutSummaryController
breca.bbino_CheckoutWaitScreenController
breca.bbino_CreateOrderActionController
breca.bbino_DeliveryMethodController
breca.bbino_InputBuyerController
breca.bbino_InputCartItemController
breca.bbino_OrderCreationController
breca.bbino_PaymentMethodController
breca.bbino_ShippingAddressController
  
```

Custom Metadata Types

Provide access for orderpad users to the following Custom Metadata Types:

- breca.Orderpad Setting

Only users with Customize Application permission can provide access to custom metadata types.

To grant a specific profile or permission set read access to a custom metadata type:

1. Go to the profile or permission set that you want to grant access to.
2. Under Enabled Custom Metadata Type Access, click **Edit**.
3. Add the custom metadata type to the list of enabled custom metadata types.

Profile

Custom: Support Profile



Clone

Delete

Edit Properties

[Profile Overview](#)

>

Custom Metadata Types 

Custom Metadata Types

Save

Cancel

Available Custom Metadata Types

--None--

Add



Remove

Enabled Custom Metadata Types

breca.Orderpad Setting



Oderpad Settings

Enable Credit Card Attachment (Optional)

If you want your user to be able to attach a credit card to a buyer's order during checkout, follow the steps in this section, otherwise skip this step,

To use the cardPaymentMethod component in the checkout flow and be able to attach a credit card as a payment method, you should follow the steps below to grant the user access to complete this task.

1. Assign a Permission Set License to your user

Open Setup -> Find the user you want to grant access to -> Click "Edit Assignment" next to the Permission Set License Assignments section -> Enable Permission Set License which gives the user the ability to enable Payments Api User permission. Examples of permission set licenses you can use: Commerce Business User, Commerce User, Lightning Order Management User -> Save

The screenshot displays the 'Users' management interface. On the left, a sidebar lists navigation options: Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, and Densitr Settings. The 'Users' section is active. The main panel shows the 'Users' setup page with a search bar and a list of users. Below this, there are several sections for managing permissions and assignments. The 'Permission Set License Assignments' section is highlighted with a red box, showing a table with columns for Action, Permission Set License Label, and Date Assigned. The table contains one entry: 'Commerce User' assigned on 26/06/2022. The 'Edit Assignments' button next to this section is also highlighted with a red box.

Commerce User ☒ Allow access to B2C 1-Commerce features.

User Permissions

- B2C Commerce User
- Commerce User
- Manage Account Addresses
- Payments Api User
- Run Flows

Object Permissions

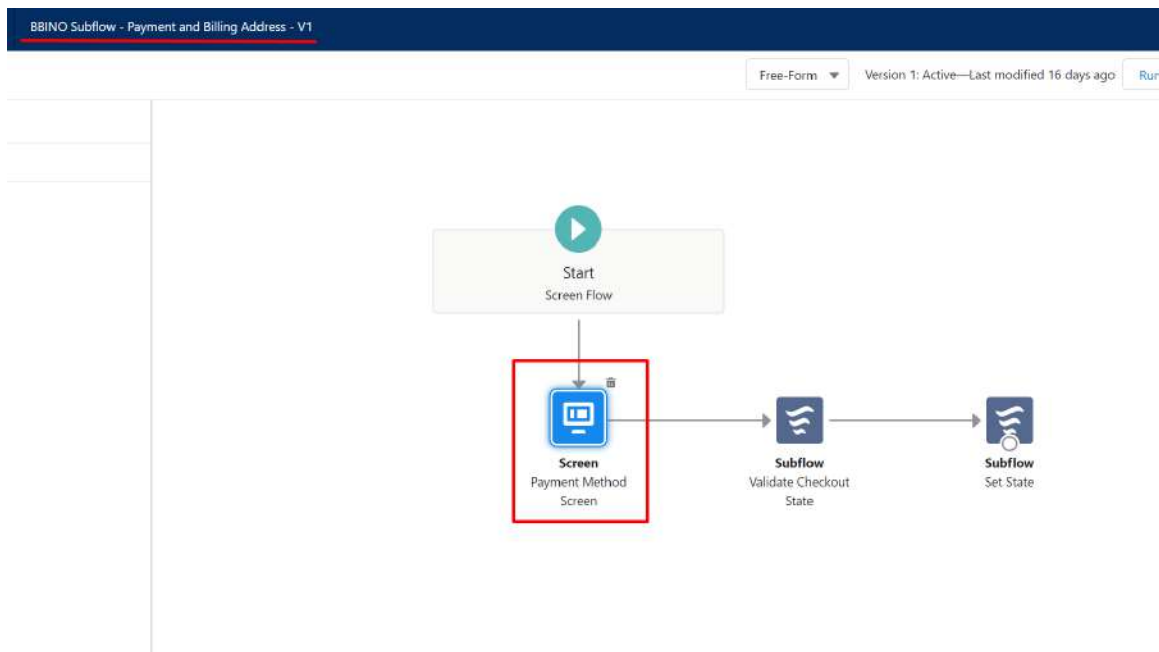
- Accounts: Read
- Background Operations: Read
- Carts: Read
- Catalogs: Read
- Categories: Read
- Contact Point Addresses: Read, Create, Edit, Delete
- Contacts: Read, Edit
- Electronic Media Groups: Read
- Images: Read
- Individuals: Read
- Locations: Read
- Order Delivery Methods: Read
- Order Summaries: Read
- Orders: Read
- Price Books: Read
- Product Category Products: Read
- Products: Read
- Store Catalogs: Read
- Stores: Read
- User External Credentials: Read, Create, Edit, Delete
- Wishlists: Read, Create, Edit, Delete

2. Provide the user system permission

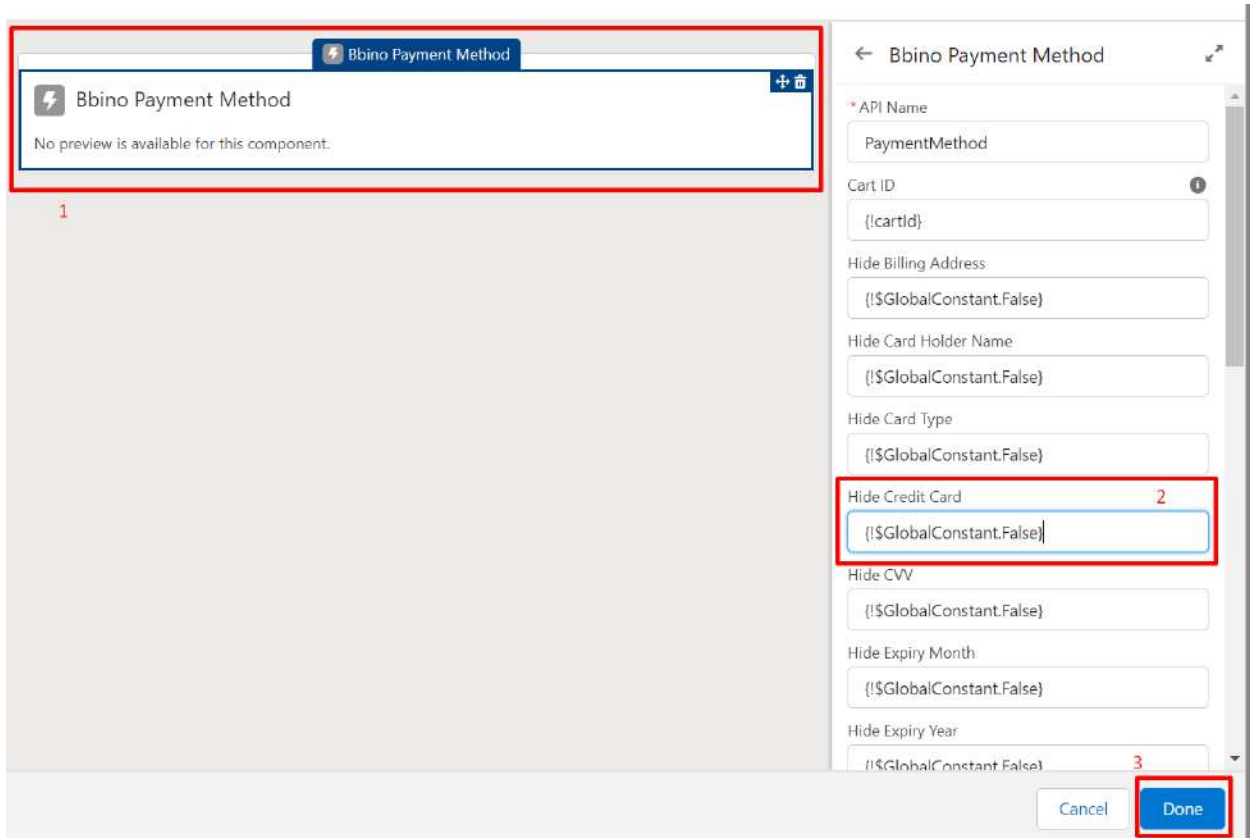
Grant the Payments Api User system permission to the user

3. Show the credit card component in flow

By default the credit card payment component is hidden. Go to the BBINO Subflow - Payment and Billing Address flow and open the Payment Method Screen element.



Click on the Bbino Payment Method component. Set the Hide Credit Card option to `{!$GlobalConstant.False}`. Click the Done button. Save the new flow version and activate it.



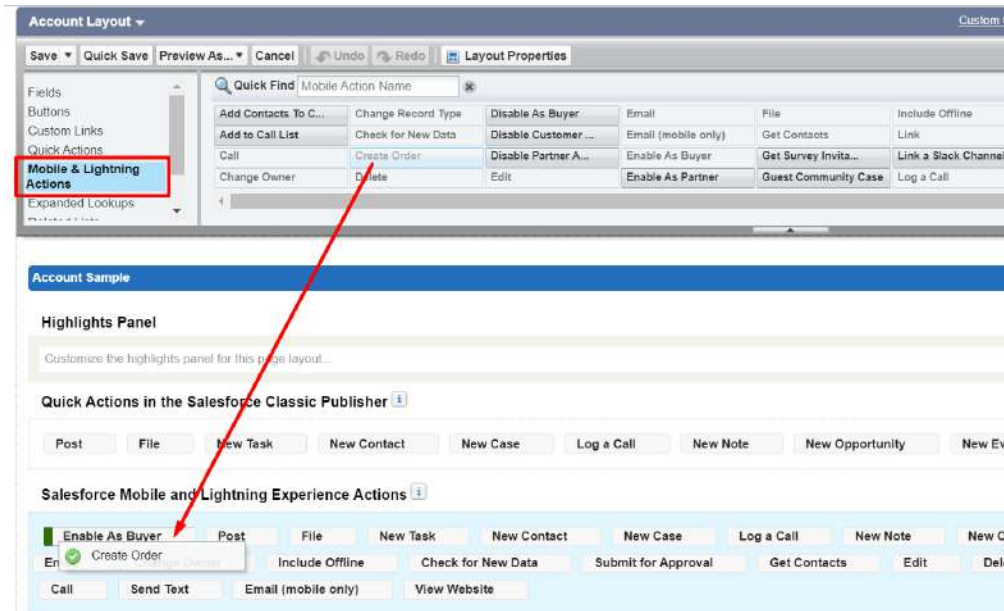
Add Quick Actions to Layouts

Create Order Action

To let your users create orders directly from account/contact pages, add "Create Order" quick actions to record layouts.

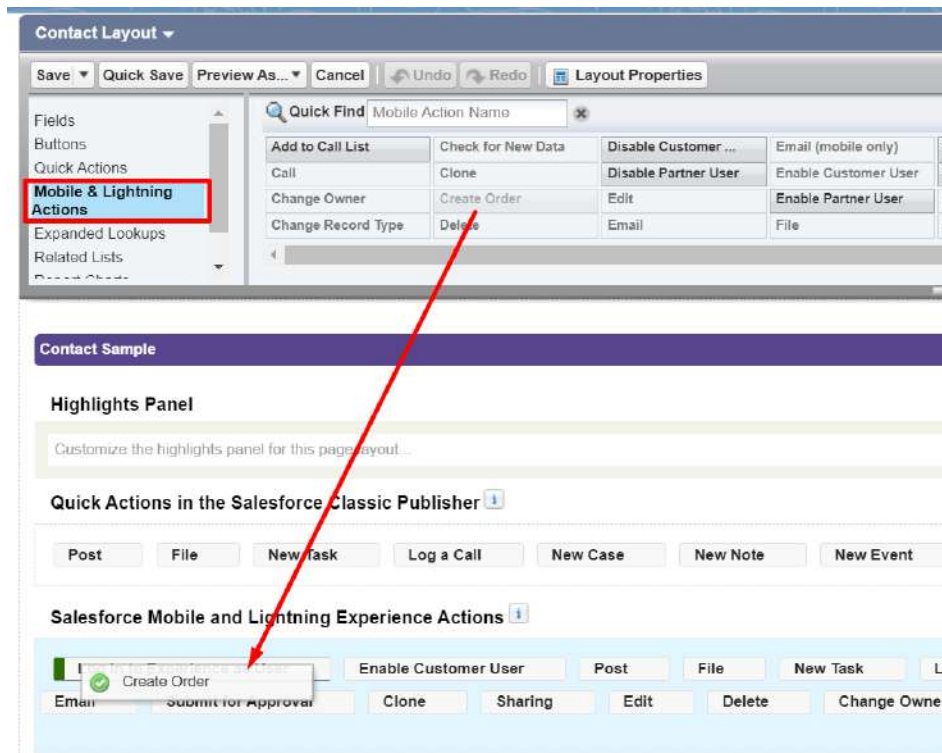
1. Add quick action to account page layout

Open Setup -> Select Object Manager -> Open Account -> Go to Page Layouts -> Select the page layout where you want to display the quick action -> Drag the Create Order quick action to the Salesforce Mobile and Lightning Experience Actions section -> Save



2. Add quick action to contact page layout

Open Setup -> Select Object Manager -> Open Contact -> Go to Page Layouts -> Select the page layout where you want to display the quick action -> Drag the Create Order quick action to the Salesforce Mobile and Lightning Experience Actions section -> Save

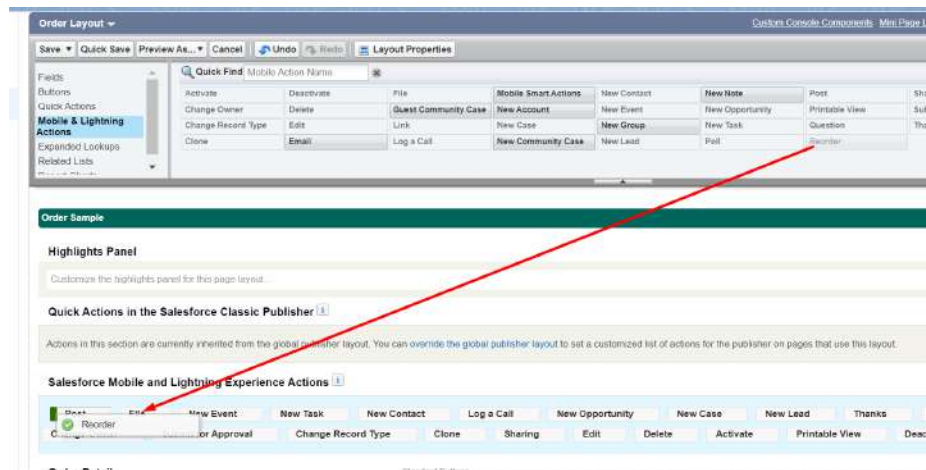


Reorder Action

To let your users make reorder from order/order summary pages, add "Reorder" quick actions to record layouts.

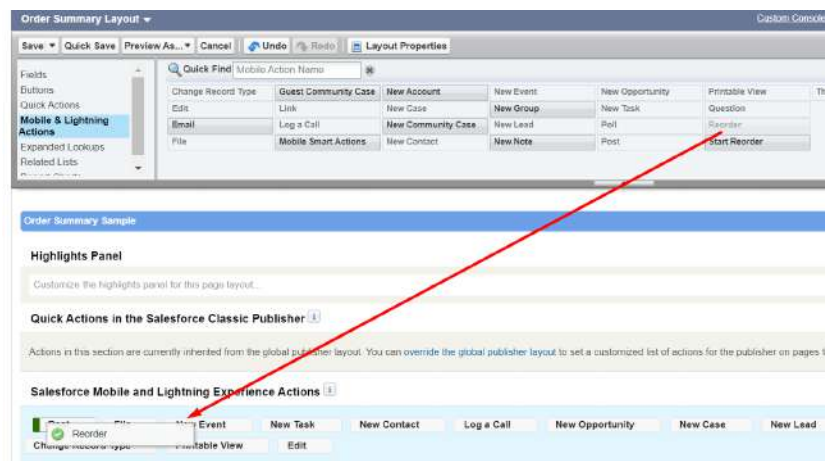
1. Add quick action to order page layout

Open Setup -> Select Object Manager -> Open Order -> Go to Page Layouts -> Select the page layout where you want to display the quick action -> Drag the Reorder quick action to the Salesforce Mobile and Lightning Experience Actions section -> Save



2. Add quick action to order summary page layout

Open Setup -> Select Object Manager -> Open Order Summary -> Go to Page Layouts -> Select the page layout where you want to display the quick action -> Drag the Reorder quick action to the Salesforce Mobile and Lightning Experience Actions section -> Save



Show Sales Representatives in Store

This section explains how to display the Sales Representative field in Order History and Order Details pages of the store so the buyer can see exactly who created the order on their behalf.

You have two options on how to display this field, either as a lookup field or as plain text using a formula field.

Use lookup field

To use this method, orderpad users must be members of the site (their profile or permission set have to be added to experience members using the experience workspace) and you have to share orderpad users for buyers (use sharing rules or consider using the "Site User Visibility" setting). Otherwise, buyers will only see the user Id, not the name.

My Orders

Filter by date:

Start Date
08/08/2021

End Date
08/08/2022

Apply
Reset

Sort items by most recent order ▼

3 items

Order Summary Number: 00000102	Ordered Date: 8/8/2022, 19:15	Status: Created	Total: €2,796.78	START REORDER View Details
Sales Representative: Sys Admin				
The buyer can see the user name because they have read access to the Sys Admin user, and the Sys Admin user is a site member				
Order Summary Number: 00000101	Ordered Date: 5/8/2022, 14:31	Status: Created	Total: €5,196.63	START REORDER View Details
Sales Representative: 0057Q000006iPvSQAU				
The buyer only sees the user Id because either they don't have read access to the user, or the user is not a site member, or both				
Order Summary Number: 00000100	Ordered Date: 5/8/2022, 13:52	Status: Created	Total: €881.22	START REORDER View Details

If all conditions are met, go to the [Add field to the pages](#) section. If this method is not applicable in your case, use a formula field.

Use the formula field

The formula field is not provided by the package. To create the field, go to the Setup -> Open Object Manager -> Select Order Summary object -> Open Fields & Relationships -> Click the New button -> Select Formula data type -> Select Text formula return type -> Enter a field label and field name of your choice and click Next -> In the formula section, paste this code:

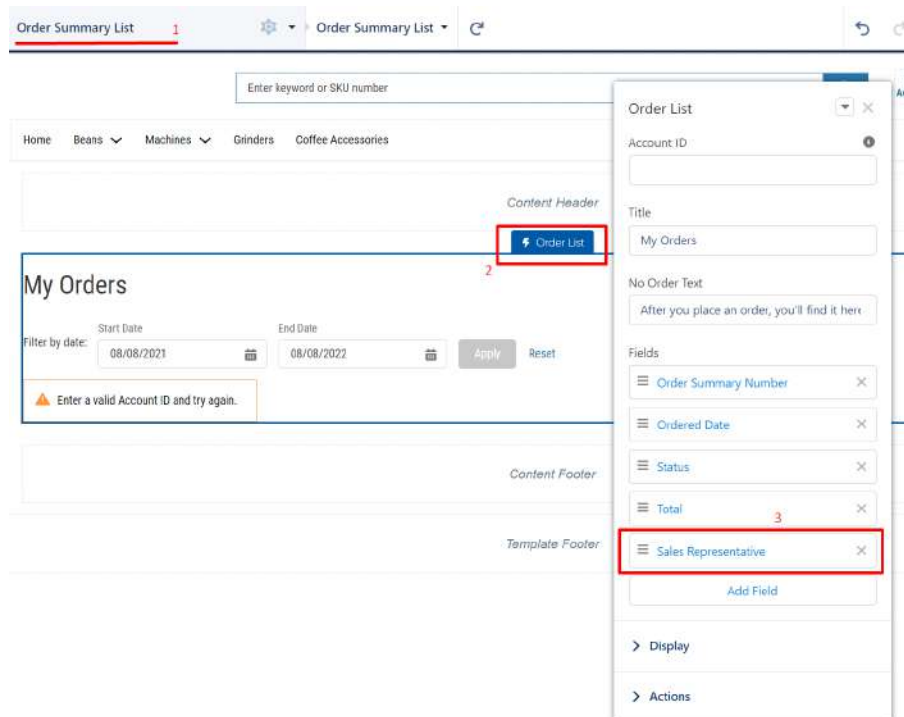
```
breca_SalesRepresentative__r.FirstName & " " & breca_SalesRepresentative__r.LastName
```

-> Click Next -> Make visible to admin and buyer profiles and click Next -> If necessary, add the field to the layout and click Save.

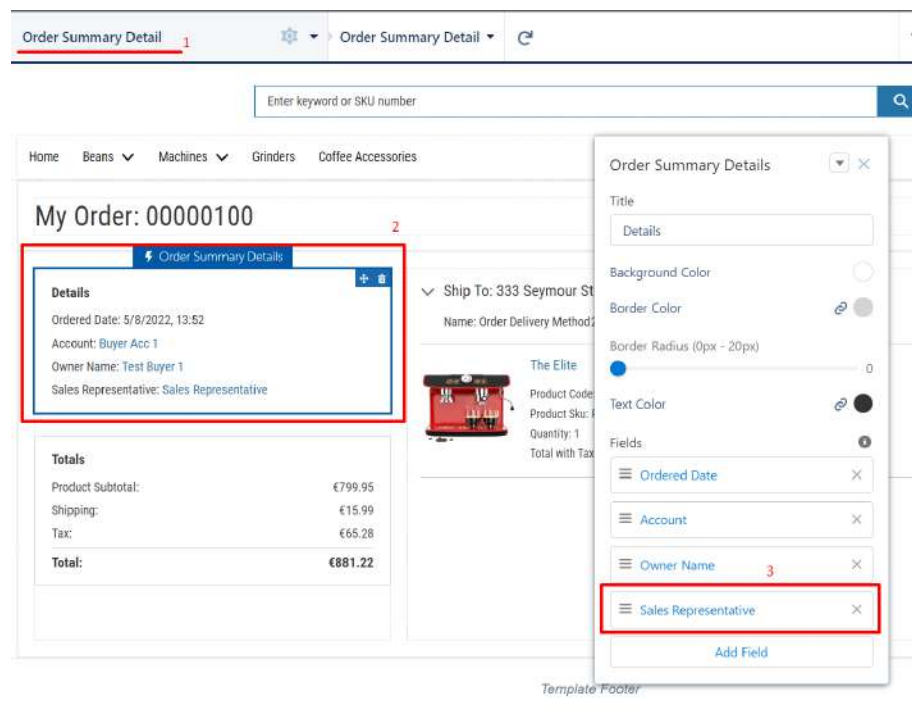
Now you can display the created field on the Order History and Order Details page.

Add field to the pages

To add the field to the Order History page, go to the Experience Builder -> Open the Order Summary List page -> Select the Order List component -> In the Fields section, click the Add Field button -> Click on the added field to open the Edit Field window -> In the window select the Sales Representative field and click Save.



To add the field to the Order Detail page, open the Order Summary Detail page -> Select the Order Summary Details component -> In the Fields section, click the Add Field button -> Click on the added field to open the Edit Field window -> In the window select the Sales Representative field and click Save.



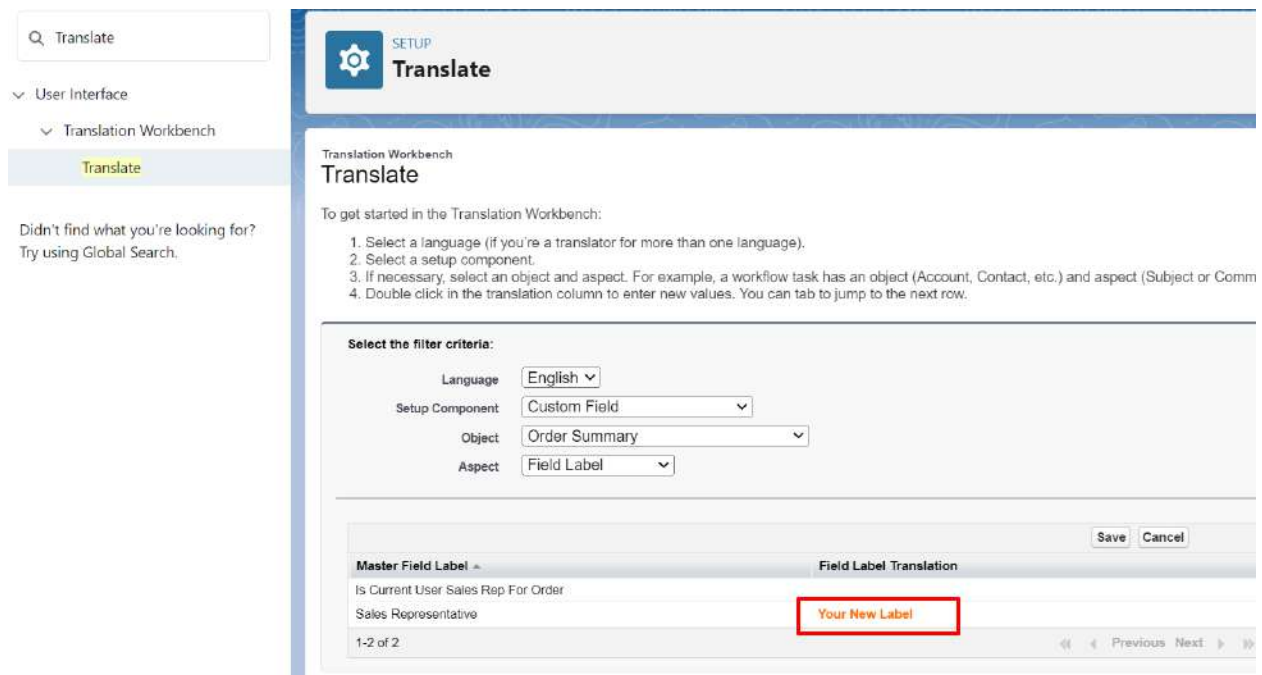
Note: The buyer user must have read access to the "Sales Representative" field in order to see it in these components.

After that, publish the changes.

Rename the Sales Representative Field (Optional)

If you want to change the label of the Sales Representative field, follow the instructions in this section.

Go to Setup -> Go to Translate -> Set Custom Field for Setup Component and select Order/Order Summary object -> Set a new label for the Sales Representative field in the Field Label Translation column -> Click Save



Q Translate

User Interface

Translation Workbench

Translate

Didn't find what you're looking for?
Try using Global Search.

SETUP Translate

Translation Workbench
Translate

To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comm
4. Double click in the translation column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Language: English

Setup Component: Custom Field

Object: Order Summary

Aspect: Field Label

Save Cancel

Master Field Label	Field Label Translation
Is Current User Sales Rep For Order Sales Representative	Your New Label

1-2 of 2

Previous Next

Customizing List Views

The package has three list views that display all carts/orders/order summaries where the current user is a sales representative (carts/orders created by the current user from the AC Orderpad app).

Api name for the Cart list view - MyCarts.

Api name for the Order list view - MyOrders.

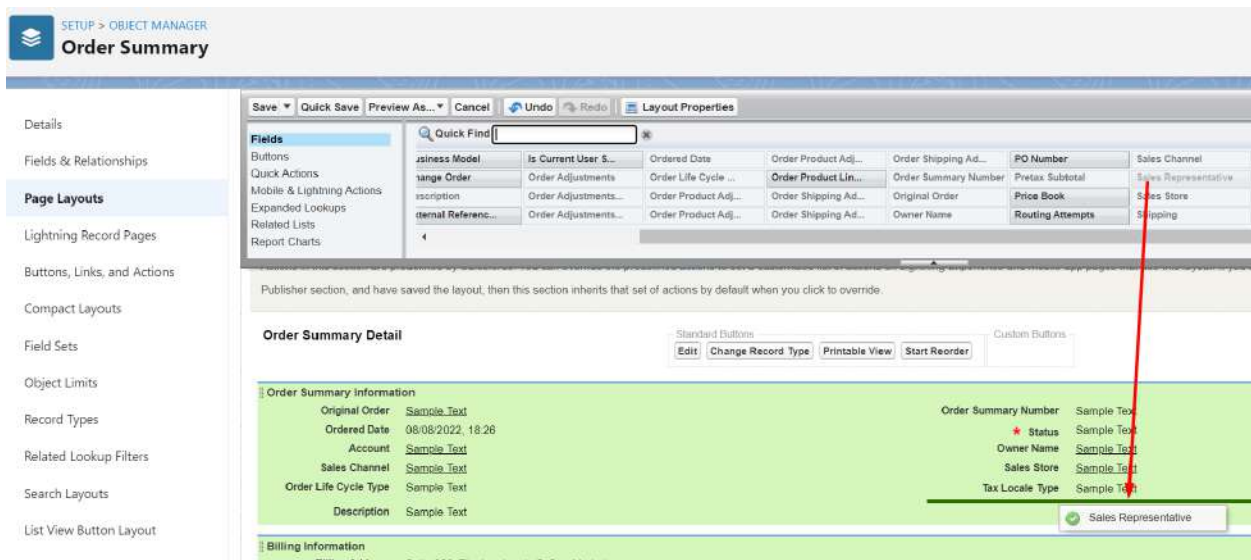
Api name for the Order Summary list view - MyOrderSummaries.

You can rename them, change the sharing, and update fields to display.

Customizing Page Layouts

Consider adding the Sales Representative field to Order/Order Summary page layouts. The Sales Representative field displays the user who created the order on behalf of the buyer using the AC Orderpad app.

To add the field to the page layout, open Setup -> Select Object Manager -> Open Order or Order Summary object -> Go to Page Layouts -> Select the page layout where you want to add the field -> Drag the Sales Representative field to the Detail section -> Save.



SETUP > OBJECT MANAGER
Order Summary

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Business Model	Is Current User S...	Ordered Date	Order Product Adj...	Order Shipping Ad...	PO Number	Sales Channel
Original Order	Order Adjustments	Order Life Cycle ...	Order Product Lin...	Order Summary Number	Pretax Subtotal	Sales Representative
Description	Order Adjustments...	Order Product Adj...	Order Shipping Ad...	Original Order	Price Book	Sales Store
Internal Reference...	Order Adjustments...	Order Product Adj...	Order Shipping Ad...	Owner Name	Routing Attempts	Shipping

Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Order Summary Detail

Standard Buttons: Edit Change Record Type Printable View Start Reorder Custom Buttons

Order Summary Information

Original Order	Sample Text	Order Summary Number	Sample Text
Ordered Date	08/08/2022, 18:26	Status	Sample Text
Account	Sample Text	Owner Name	Sample Text
Sales Channel	Sample Text	Sales Store	Sample Text
Order Life Cycle Type	Sample Text	Tax Locale Type	Sample Text
Description	Sample Text		

Billing Information

Billing Address: Suite 300 The Landmark 36 One Market

Sales Representative


Order Summary
00000110

[+ Follow](#)
[New Contact](#)
[New Opportunity](#)

Account	Ordered Date	Status	Billing Address	Sales Channel	Tax Locale Type
Buyer2	08/08/2022, 17:42	Created			Net

[Summary](#)
[Related](#)
[Details](#)
[Feed](#)

Order Summary Information

Original Order	Order Summary Number
00000110	00000110
Ordered Date	Status
08/08/2022, 17:42	Created
Account	Owner Name
Buyer2	 Buyer Contact 2
Sales Channel	Sales Store
	AcEcommerce
Order Life Cycle Type	Tax Locale Type
Unmanaged	Net
Description	Sales Representative
	 CSR User

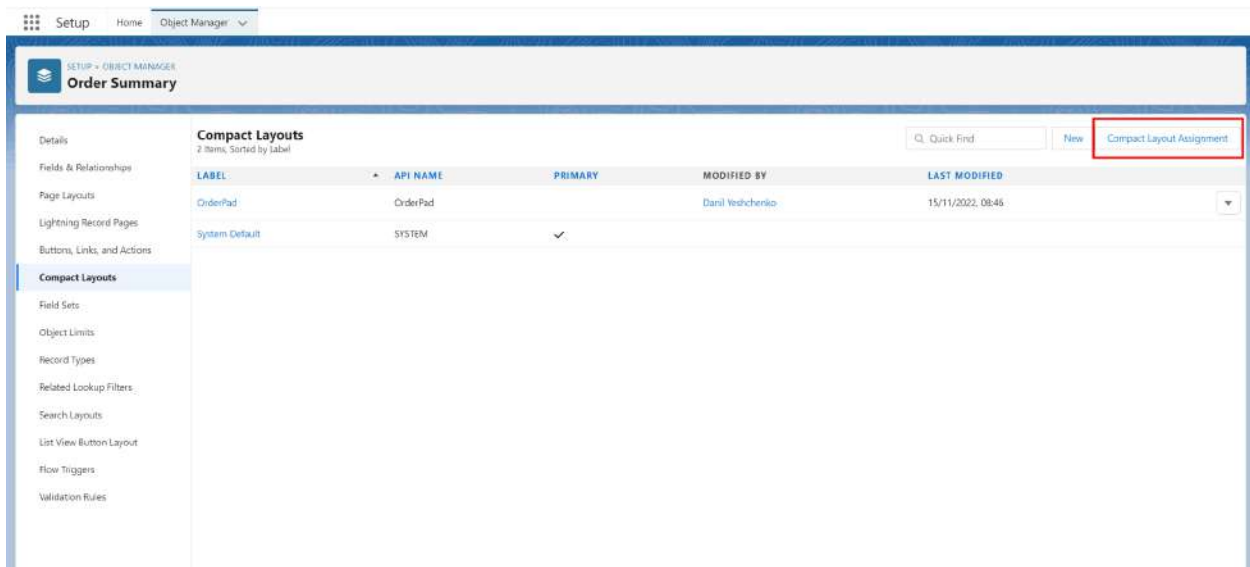
Billing Information

Customizing Order Summary Compact Layout

The package provides a compact layout for the Order Summary. You can use your own compact layout or choose the one provided in the package.

To select the compact layout from the package:

Go to Setup -> Object Manager -> Order Summary -> Compact Layouts -> Compact Layout Assignment



The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: Setup > Object Manager > Order Summary > Compact Layouts. The left sidebar shows the navigation menu with 'Compact Layouts' selected. The main content area displays a table of compact layouts for the Order Summary object. The table has columns: LABEL, API NAME, PRIMARY, MODIFIED BY, and LAST MODIFIED. There are two rows: 'OrderPad' and 'System Default'. The 'OrderPad' row is selected. A red box highlights the 'Compact Layout Assignment' button in the top right corner of the table area.

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
OrderPad	OrderPad		Daniel Veshchenko	15/11/2022, 08:45
System Default	SYSTEM	✓		

Edit Assignment -> Select "OrderPad" and click Save

SETUP > OBJECT MANAGER

Order Summary

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts**
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Order Summary Compact Layouts

Compact Layout Assignment

Save Cancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: OrderPad

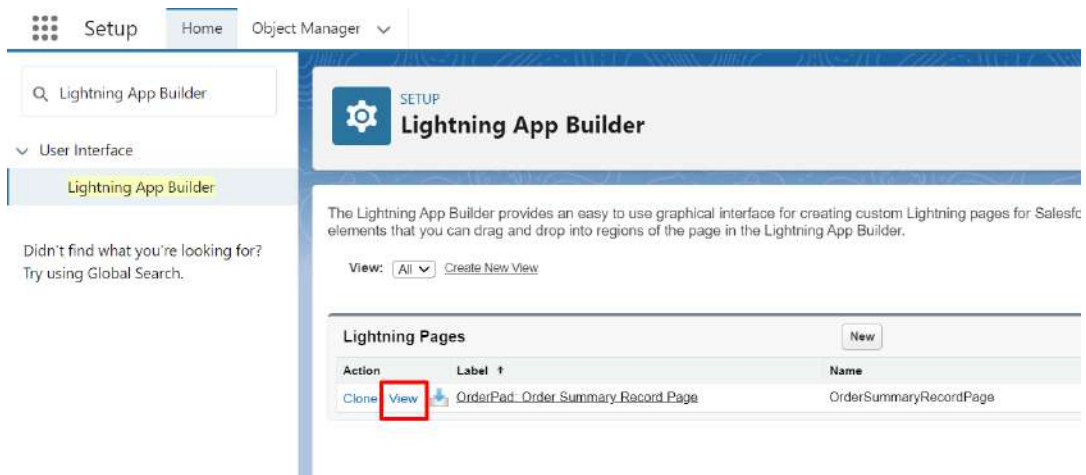
Save Cancel

Customizing Order Summary Record Page

The package provides a record page for the Order Summary. You can use your own record page or choose the one provided in the package.

To assign the record page from the package to OrderPad app:

Go to Setup -> Lightning App Builder -> Click View next to OrderPad: Order Summary Record Page



Setup Home Object Manager

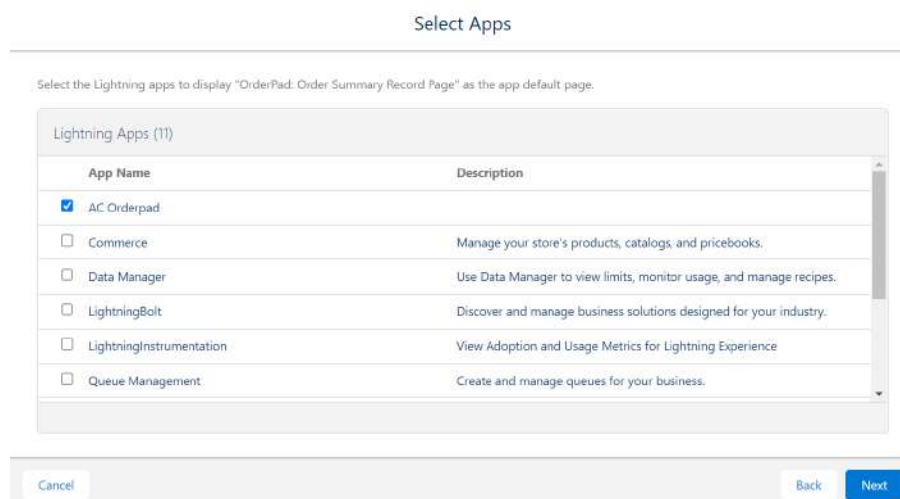
Lightning App Builder

The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce elements that you can drag and drop into regions of the page in the Lightning App Builder.

View: All Create New View

Action	Label ↑	Name
Clone View	OrderPad: Order Summary Record Page	OrderSummaryRecordPage

Activation... -> App Default -> Assign as App Default -> Select AC Orderpad and click Next



Select Apps

Select the Lightning apps to display "OrderPad: Order Summary Record Page" as the app default page.

App Name	Description
☒ AC Orderpad	
☐ Commerce	Manage your store's products, catalogs, and pricebooks.
☐ Data Manager	Use Data Manager to view limits, monitor usage, and manage recipes.
☐ LightningBolt	Discover and manage business solutions designed for your industry.
☐ LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☐ Queue Management	Create and manage queues for your business.

Cancel Back Next

Next -> Save

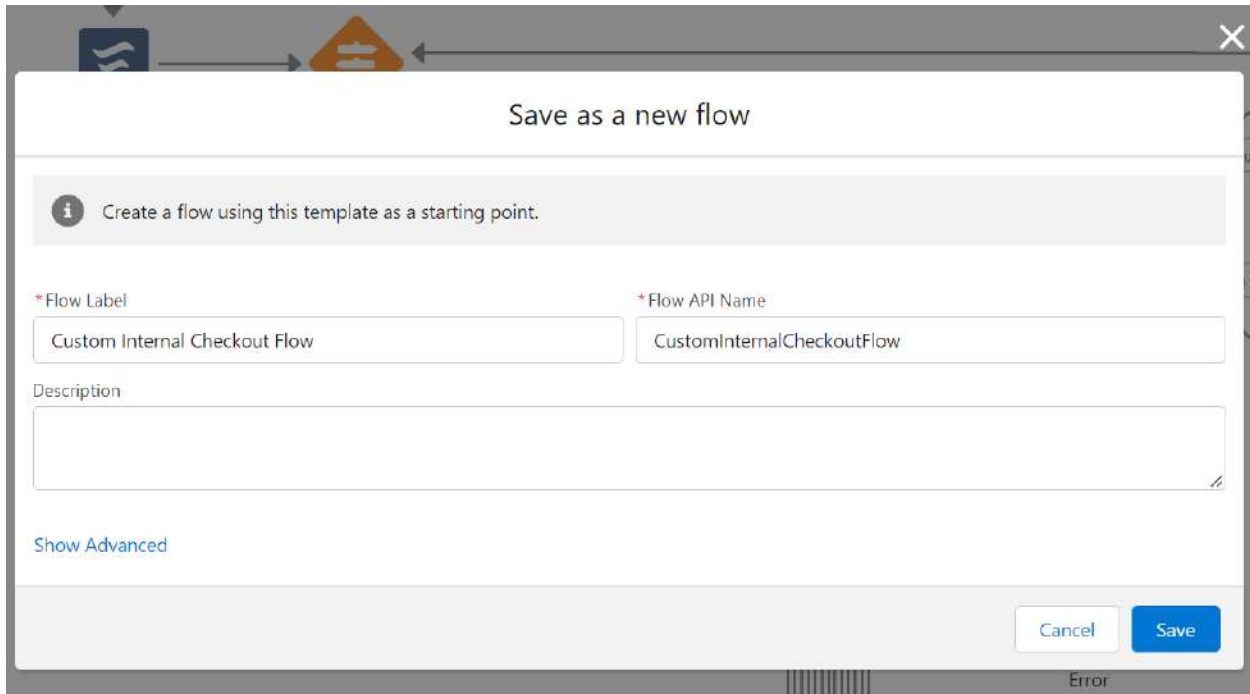
Customizing Checkout Flow

The checkout process is built with Flow so it is fully customizable but may require additional custom development. It all depends on your business requirements:

- Minor changes, such as changing labels, hiding the delivery instructions section, or switching between creating a managed or unmanaged order, can take a few minutes.
- Changes such as creating additional records, and using a different checkout process for each store, can be done declaratively using the tools provided by Flow and can take anywhere from a few hours to several days or even weeks (it really depends on how many changes you want to make).
- Really big changes, like adding new custom components or creating a one-page checkout process, require additional development that your team can do, or you can hire the Advanced Communities team.

Note: You can try using custom components developed for your stores, but keep in mind that they may not work in AC Orderpad due to different environments (was external, now internal) and different users (was a buyer, now an internal user).

To customize the checkout flow used in the AC Orderpad app, you should clone “BBINO Internal Checkout Flow”. To clone the flow, open it in the flow editor and click “Save as”.



After making changes, save and activate the flow. Now you need to go to the custom metadata with API name “breca__OrderpadSetting__mdt”, edit the “Checkout Flow” metadata record, and enter your cloned flow name into the “Setting Value” field.

Share Order and Order Summaries

If Default Internal Access for Order and/or Order Summary is set to Private or Public Read Only in Organization-Wide Defaults settings, update the checkout flow to share these records with a sales representative (the user who creates orders from AC Orderpad app).

1. Open “BBINO Subflow - Set Sales Representative” in the flow builder.
2. (Skip this step if you only want to share an Order Summary record) Add a Create Records element to the flow. Set it up like in the image and click Done.



New Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
Share Order	ShareOrder
Description	

How Many Records to Create

- ☒ One
☐ Multiple

How to Set the Record Fields

- ☐ Use all values from a record
☒ Use separate resources, and literal values

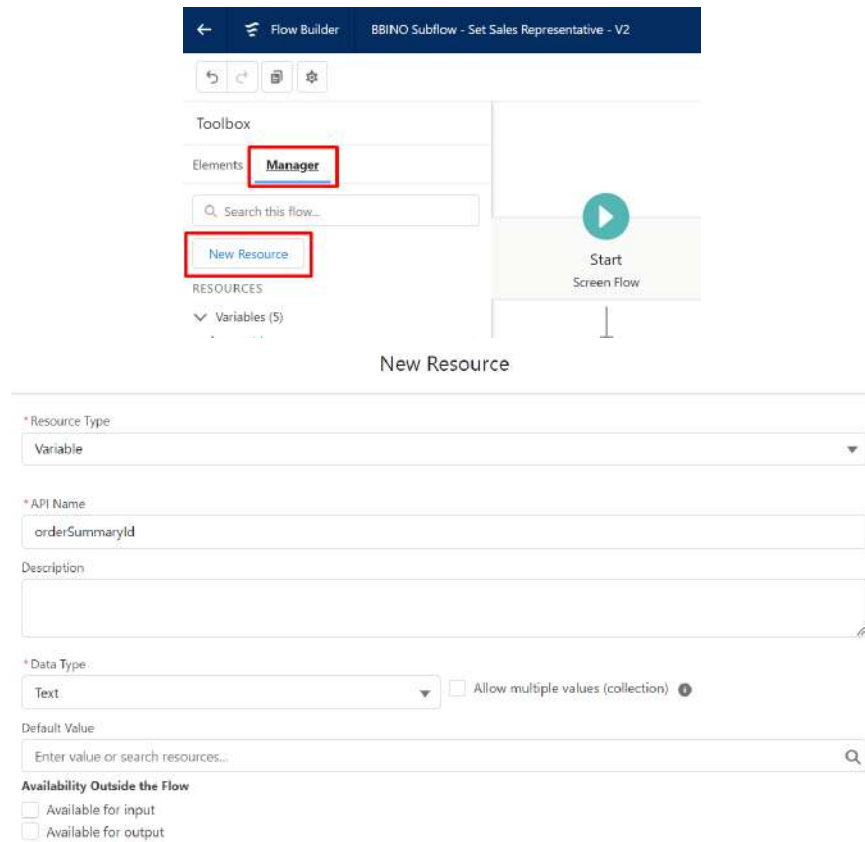
Create a Record of This Object

* Object
Order Share

Set Field Values for the Order Share

Field	Value
OrderAccessLevel	Edit
Field	Value
OrderId	Aa orderId X
Field	Value
RowCause	Manual
Field	Value
UserOrGroupId	Aa salesRepid X
+ Add Field	
☐ Manually assign variables	

3. (Skip this step if you only want to share an Order record) Open the Manager tab and click New Resource. Set it up like in the image and click Done.



The screenshot shows the 'Flow Builder' interface for 'BBINO Subflow - Set Sales Representative - V2'. The 'Elements' panel on the left has 'Manager' and 'New Resource' highlighted with red boxes. The 'New Resource' form is open, showing the following fields:

- * Resource Type: Variable
- * API Name: orderSummaryId
- Description: (empty text area)
- * Data Type: Text (with a dropdown arrow) and a checkbox for 'Allow multiple values (collection)'.
- Default Value: Enter value or search resources... (with a search icon)
- Availability Outside the Flow:
 - ☐ Available for input
 - ☐ Available for output

4. (Skip this step if you only want to share an Order record) Add a Get Records element to the flow. Set it up like in the image and click Done.

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Get Order Summary (GetOrderSummary) 

Get Records of This Object

* Object
Order Summary

Filter Order Summary Records

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
OriginalOrderId	Equals	A ₀ orderId X

[+ Add Condition](#)

Sort Order Summary Records

Sort Order
Not Sorted  If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record
☐ All records

How to Store Record Data

☐ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☒ Choose fields and assign variables (advanced)

To use the returned **Order Summary** records in the flow, store their fields in variables.

Where to Store Field Values

☐ Together in a record variable
☒ In separate variables

Select Variables to Store Order Summary Fields

Field	Variable
Id	A ₀ orderSummaryId X

[+ Add Field](#)

☒ When no records are returned, set specified variables to null.

5. (Skip this step if you only want to share an Order record) Add another Create Records element to the flow. Set it up like in the image and click Done.



New Create Records

Create Salesforce records using values from the flow.

*Label	*API Name
Share Order Summary	ShareOrderSummary
Description 	

How Many Records to Create

- ☒ One
☐ Multiple

How to Set the Record Fields

- ☐ Use all values from a record
☒ Use separate resources, and literal values

Create a Record of This Object

*Object

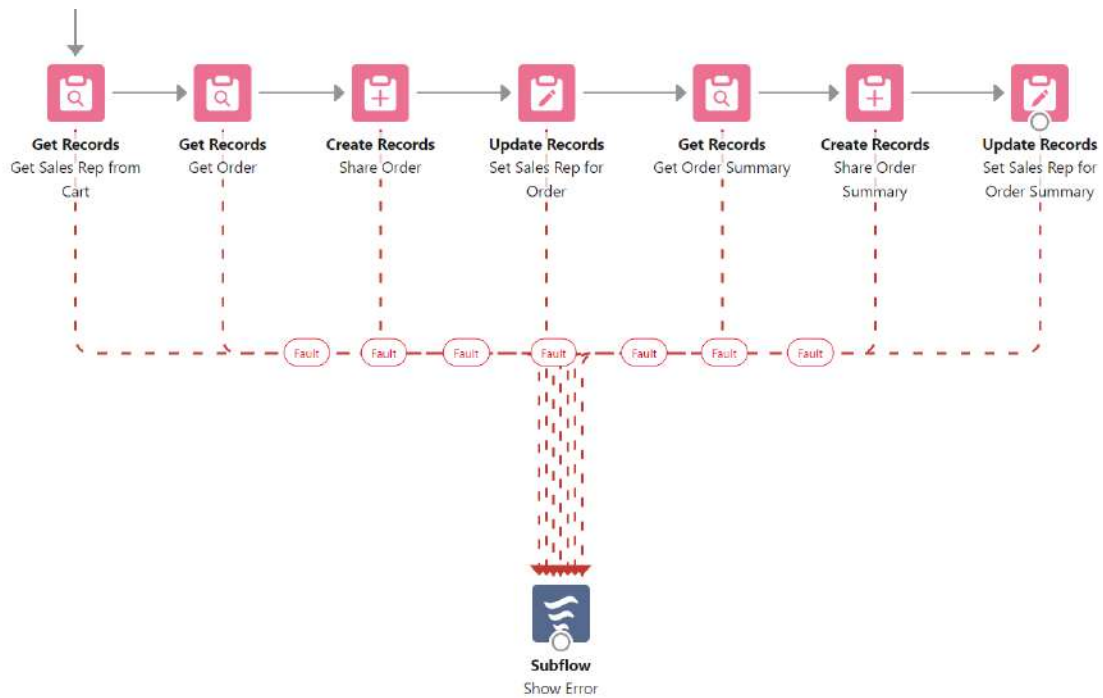
Set Field Values for the Order Summary Share

Field	Value
AccessLevel	Edit
Field	Value
ParentId	Aa orderSummaryId
Field	Value
RowCause	Manual
Field	Value
UserOrGroupId	Aa salesRepld

[+ Add Field](#)

☐ Manually assign variables

6. Connect all the elements as shown in the image.



- Click the Save As button. Specify the desired name for the new flow. For "How to Run the Flow" set "System Context Without Sharing". Click Save.

*Flow Label

*Flow API Name

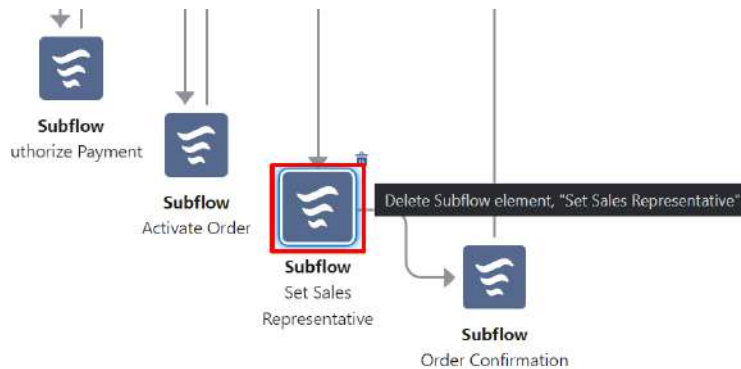
Description

[Hide Advanced](#)

How to Run the Flow 

- Activate the created flow by clicking the Activate button.
- To replace the "BBINO Subflow - Set Sales Representative" flow with the one you created, you need to make a copy of the BBINO Internal Checkout Flow provided by the package. See how to do this in the [Customizing Checkout Flow](#) section.

10. Open the copied checkout flow. Delete the "Set Sales Representative" subflow.



11. Add a Subflow element to flow. Set it up like in the image and click Done.

New Subflow

Referenced Flow

Internal Checkout Subflow - Order Setup

Use values from the master flow to set the inputs for the "Internal Checkout Subflow - Order Setup" 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 "Internal Checkout Subflow - Order Setup" flow.

* Label * API Name

Order Setup

OrderSetupSubflow

Description

i The referenced flow is set to run in "System Context Without Sharing—Access All Data".

Set Input Values

A_a cartId

{!cartId}

Include

A_a checkoutSessionId

{!mainCheckoutSession.Id}

Include

12. Connect the "Main Decision Hub" to the "Order Setup" subflow using the "Order Confirmation" outcome. Connect the "Order Setup" subflow to the "Order Confirmation" subflow.

13. Save the flow as a new version and activate it.



Order Creation Process

This section describes the features provided by the package.

Create an order from the AC Orderpad app

Navigate to the AC Orderpad application and open the Order Creation tab.

A screenshot of the AC Orderpad application interface. The top navigation bar includes a grid icon, the text "AC Orderpad", and three tabs: "Order Creation" (highlighted in pink), "Orders" with a dropdown arrow, and "Order Summaries" with a dropdown arrow. Below the navigation bar, there are three search fields: "Select an Account" with a search icon, "Select a Contact" with a search icon, and "Select a Store" with a search icon. Below these is a "Select a Product" search field with a search icon. A "Proceed to Checkout" button is located on the right side. On the left, there is a box labeled "Order Total" containing a table with "Total" and "£0.00". In the center, the text "Cart is empty" is displayed.

To create an order on behalf of a buyer, select their account and contact. You can also select only a contact, then the account associated with it is automatically selected.

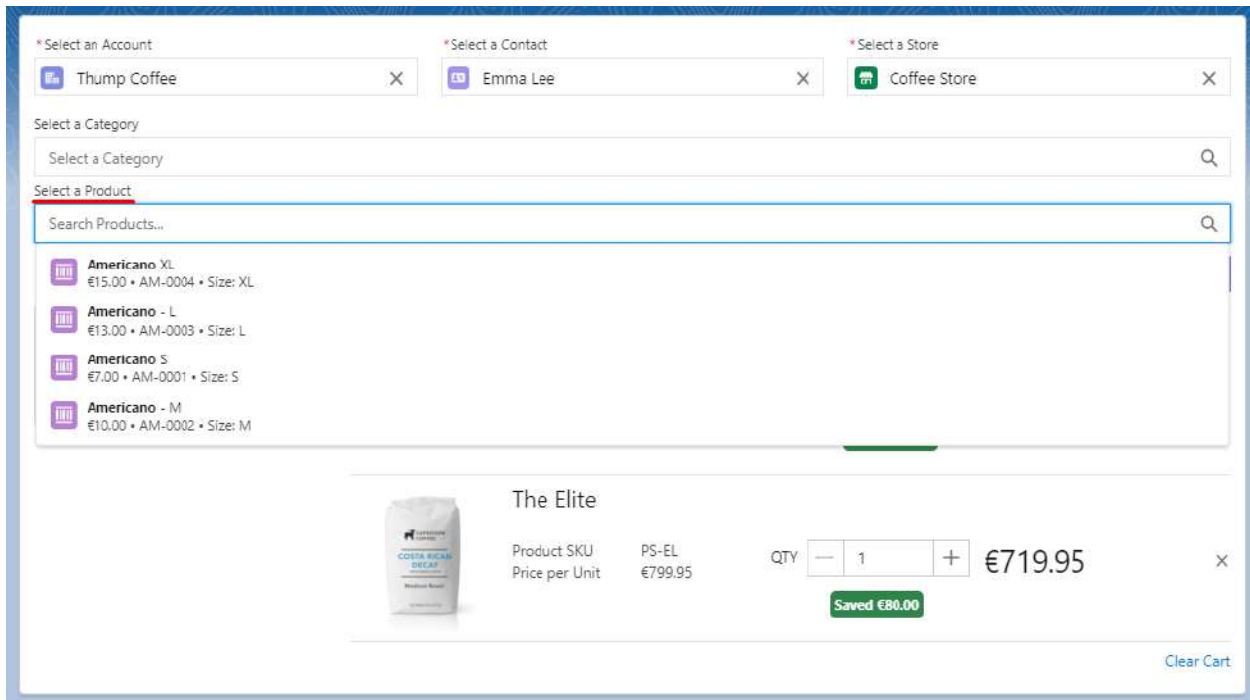
A screenshot of the AC Orderpad application interface, similar to the previous one but with selections made. The "Select an Account" field now shows "Buyer Acc 2" with a close button (X). The "Select a Contact" field now shows "Test Buyer 2" with a close button (X). The "Select a Store" field is empty with a search icon. The "Select a Product" field is empty with a search icon. The "Proceed to Checkout" button is still present. The "Order Total" box shows "Total" and "€0.00". The text "Cart is empty" is still displayed in the center.

Once Account is selected, Store is selected automatically. If there is one store related to Account, it will be displayed by default. If there is more than one store related to Account, the system displays the store that was selected by the User last time.



The screenshot shows a web interface with three selection boxes at the top: '*Select an Account' (Thump Coffee), '*Select a Contact' (Emma Lee), and '*Select a Store' (Coffee Store). Below these are two search bars: 'Select a Category' and 'Select a Product' (with placeholder text 'Search Products...'). A 'Proceed to Checkout' button is located at the bottom right.

You can now add products to the cart using the product search. Enter a product name, SKU, or description.



The screenshot shows the same interface as before, but with the 'Select a Product' search bar highlighted. Below the search bar, a list of product results is displayed:

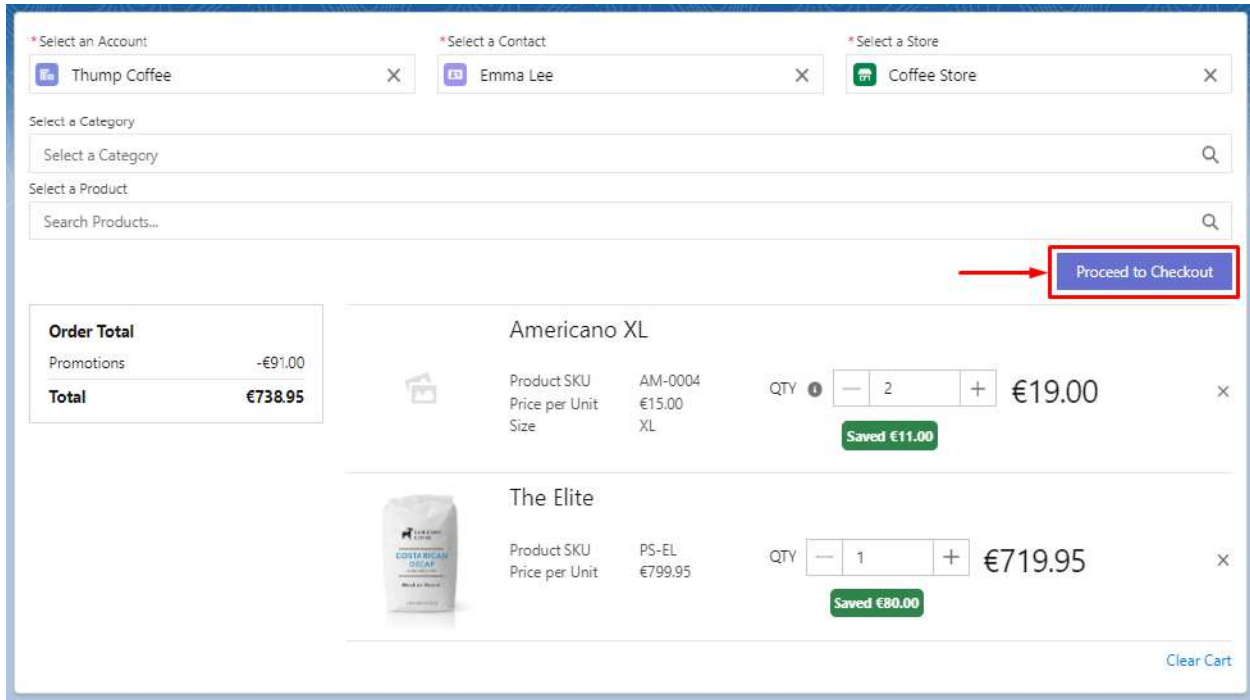
- Americano XL
€15.00 • AM-0004 • Size: XL
- Americano - L
€13.00 • AM-0003 • Size: L
- Americano S
€7.00 • AM-0001 • Size: S
- Americano - M
€10.00 • AM-0002 • Size: M

Below the product list, a cart item is shown: 'The Elite' coffee. The cart item details include:

- Product SKU: PS-EL
- Price per Unit: €799.95
- QTY: 1
- Total Price: €719.95
- Saved: €80.00

A 'Clear Cart' button is located at the bottom right of the cart section.

After completing your cart, click the Proceed to Checkout button to run the Checkout Flow.



The checkout flow specified in the Orderpad Settings custom metadata will run. The flow is similar to the checkout flow in a store. To set it up, see [Customizing Checkout Flow](#) section. After successfully completing, a new order will be created.

Create Account/Contact

Account can be enable as Buyer

The screenshot displays the 'AC Orderpad' interface for 'Advanced COMMUNITIES'. The top navigation bar includes 'Order Creation', 'Order Summaries', 'Carts', 'Orders', and 'Accounts'. The main header shows the account name 'Account' and a profile picture. Below this, there are buttons for '+ Follow', 'Create Order', 'Enable As Buyer' (highlighted with a red box and an arrow), and 'New Contact'. The account details section lists 'Type', 'Phone', 'Website', 'Account Owner' (Danil Yeshchenko), 'Account Site', and 'Industry'. The 'Related' section on the left includes tabs for 'Details' and 'News', and lists 'Contact Point Addresses (0)', 'Contacts (0)', 'Opportunities (0)', and 'Cases (0)', each with a 'New' button. The 'Activity' section on the right has tabs for 'Activity' and 'Chatter', and includes a 'New Task' button, a 'Log a Call' button, and a 'More' button. It also features a 'Create a task...' input field, an 'Add' button, and filters for 'All time', 'All activities', and 'All types'. The 'Upcoming & Overdue' section shows 'No activities to show' and provides instructions on how to get started.

And Contact must have Buyer profile

SETUP Users

New User

Help for this Page

User Edit [Save] [Cancel]

General Information ⓘ = Required Information

First Name		Role	DYesh Customer Person Account ⓘ
Last Name	Name	User License	Customer Community Plus
Alias	name	Profile	Buyer User Profile From QuickStart ⓘ
Email		Active	☒
Username		Knowledge User	☐
Nickname		Data.com User Type	--None-- ⓘ
Title		Data.com Monthly Addition Limit	Default Limit (300) ⓘ
Company		Quick Access Menu	☒
Department		Salesforce CRM Content User	☒
		Receive Salesforce CRM Content Email Alerts	☒ ⓘ
		Receive Salesforce CRM Content Alerts as Daily Digest	☒ ⓘ

Create an order from the Account/Contact page

Navigate to the account or contact on behalf of which you want to create an order. Then click on the Create Order quick action. If you don't see the quick action, check if you have [added it to the record layout](#).

Contact: **Ms. Emma Lee** ⓘ

[+ Follow] **Create Order** [Log in to Experience as User] [New Case] ⓘ

Title: Account Name: Phone (2): Email: Contact Owner: Danil Yeshchenko ⓘ

Related Details News

We found no potential duplicates of this Contact.

Opportunities (0) [New]

Cases (0) [New]

Activity Chatter

New Task Log a Call New Event Email

Create a task... [Add]

Filters: All time • All activities • All types ⓘ

[Refresh] [Expand All] [View All]



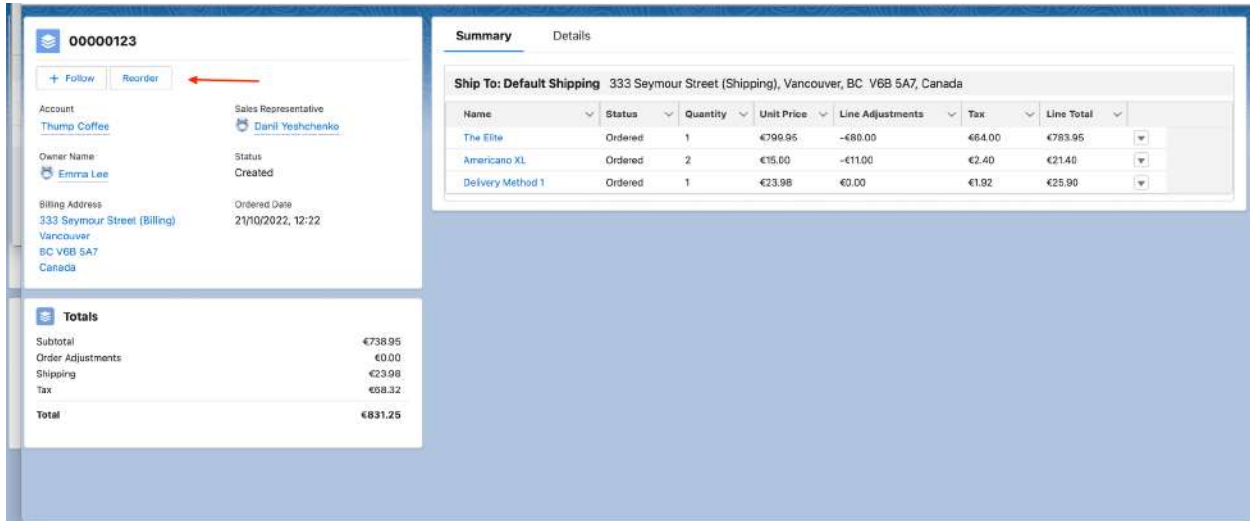
You will then see an order creation form with the account/contact already pre-populated.

A screenshot of a web-based order creation form. At the top, there are three dropdown menus: "Select an Account" with "Thump Coffee" selected, "Select a Contact" with "Emma Lee" selected, and "Select a Store" with "Coffee Store" selected. Below these are two search bars: "Select a Category" and "Select a Product". A "Proceed to Checkout" button is on the right. On the left, an "Order Total" box shows "Promotions -€91.00" and "Total €738.95". The main area lists two items: "Americano XL" with a quantity of 2, price per unit of €15.00, and a total of €19.00, with a "Saved €11.00" tag; and "The Elite" with a quantity of 1, price per unit of €799.95, and a total of €719.95, with a "Saved €80.00" tag. A "Clear Cart" link is at the bottom right.

The order creation process is the same as described in [Create an order from the AC Orderpad app](#) section.

Reorder Process

Navigate to the order or order summary you want to reorder. Then click on the Reorder quick action. If you don't see the quick action, check if you have [added it to the record layout](#).



00000123

[+ Follow](#) [Reorder](#)

Account
Thump Coffee

Sales Representative
Dmitri Yeshchenko

Owner Name
Emma Lee

Status
Created

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

Ordered Date
21/10/2022, 12:22

Totals

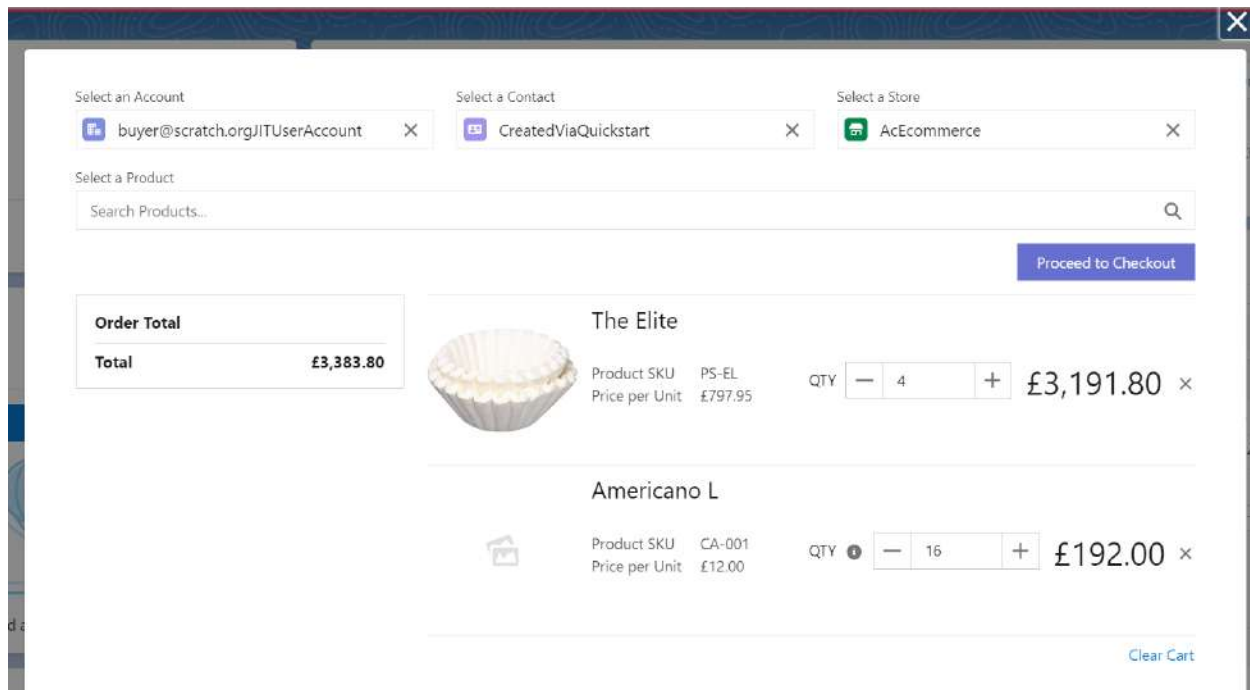
Subtotal	€738.95
Order Adjustments	€0.00
Shipping	€23.98
Tax	€58.32
Total	€831.25

Summary Details

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

Name	Status	Quantity	Unit Price	Line Adjustments	Tax	Line Total
The Elite	Ordered	1	€799.95	-€60.00	€64.00	€783.95
Americano XL	Ordered	2	€15.00	-€11.00	€2.40	€21.40
Delivery Method 1	Ordered	1	€23.98	€0.00	€1.92	€25.90

You will then see an order creation form with the account, contact, and store already pre-populated. A new cart will be created and the cart items will be copied from the order.



Select an Account: buyer@scratch.org\ITUserAccount X

Select a Contact: CreatedViaQuickstart X

Select a Store: AcEcommerce X

Select a Product: Search Products... Q

Proceed to Checkout

Order Total	
Total	£3,383.80

The Elite	
	Product SKU PS-EL Price per Unit £797.95 QTY - 4 + £3,191.80 X

Americano L	
	Product SKU CA-001 Price per Unit £12.00 QTY - 16 + £192.00 X

Clear Cart

The order creation process is the same as described in [Create an order from the AC Orderpad app](#) section.

View Your Orders and Carts

View Created Orders as Sales Representative

Navigate to the Order Summaries tab and select the My Order Summary list view (your admins can change the list view name). You will see all orders where you are a sales representative (all orders you have created from the AC Orderpad app).

1. All Orders view:

Orders							
OrderPad : All Orders							
24 items - Sorted by Order Number - Filtered by All orders - Updated a few seconds ago							
	Order Number ↑	PO Number	Account Name	Sales Representative	Order Amount	Order Start Date	Status
1	00000100	45	Thump Coffee		€175.99	24/08/2022	Activated
2	00000101	45	Thump Coffee		€4,011.74	24/08/2022	Activated
3	00000102	45	Thump Coffee	Danil Yashchenko	€4,331.72	13/09/2022	Activated
4	00000103	11111	Clink Boston (a bar)	Danil Yashchenko	€4,331.72	13/09/2022	Activated
5	00000104		Thump Coffee	Danil Yashchenko	€4,331.72	13/09/2022	Activated
6	00000105		Thump Coffee	Danil Yashchenko	€26.99	13/09/2022	Activated
7	00000106	22	Clink Boston (a bar)	Sales Team	€4,331.72	15/09/2022	Activated
8	00000107	123456	Clink Boston (a bar)	Danil Yashchenko	€4,366.71	16/09/2022	Activated
9	00000108		Clink Boston (a bar)	Danil Yashchenko	€5,078.66	16/09/2022	Activated
10	00000109	123123	Clink Boston (a bar)	Danil Yashchenko	€869.34	28/09/2022	Activated
11	00000110	123123	Clink Boston (a bar)		€152.26	28/09/2022	Activated
12	00000111		Clink Boston (a bar)	Danil Yashchenko	€4,422.71	29/09/2022	Activated
13	00000112		Clink Boston (a bar)	Danil Yashchenko	€349.97	04/10/2022	Activated
14	00000113		Clink Boston (a bar)	Danil Yashchenko	€731.94	04/10/2022	Activated
15	00000114	456	Clink Boston (a bar)	Danil Yashchenko	€735.94	04/10/2022	Activated
16	00000115	45	Thump Coffee	Sales Team	€731.94	04/10/2022	Activated
17	00000116	1122233454	Clink Boston (a bar)	Sales Team	€3,562.95	04/10/2022	Activated
18	00000117		Thump Coffee	Danil Yashchenko	€770.93	06/10/2022	Activated
19	00000118		Thump Coffee	Danil Yashchenko	€731.94	07/10/2022	Activated

2. My Orders view:

Orders							
OrderPad: My Orders							
17 items • Sorted by Order Number • Filtered by All orders - Is Current User Sales Rep For Order • Updated 2 minutes ago							
	Order Number	PO Number	Account Name	Sales Representative	Order Start Date	Order Amount	Status
1	00000102	45	Thump Coffee	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
2	00000103	11111	Clink Boston (a bar)	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
3	00000104		Thump Coffee	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
4	00000105		Thump Coffee	Danil Yeshchenko	13/09/2022	€26.99	Activated
5	00000107	123456	Clink Boston (a bar)	Danil Yeshchenko	16/09/2022	€4,366.71	Activated
6	00000108		Clink Boston (a bar)	Danil Yeshchenko	16/09/2022	€5,078.66	Activated
7	00000109	123123	Clink Boston (a bar)	Danil Yeshchenko	28/09/2022	€869.34	Activated
8	00000111		Clink Boston (a bar)	Danil Yeshchenko	28/09/2022	€4,422.71	Activated
9	00000112		Clink Boston (a bar)	Danil Yeshchenko	04/10/2022	€349.97	Activated
10	00000113		Clink Boston (a bar)	Danil Yeshchenko	04/10/2022	€731.94	Activated
11	00000114	456	Clink Boston (a bar)	Danil Yeshchenko	04/10/2022	€735.94	Activated
12	00000117		Thump Coffee	Danil Yeshchenko	06/10/2022	€770.93	Activated
13	00000118		Thump Coffee	Danil Yeshchenko	07/10/2022	€731.94	Activated
14	00000119		Thump Coffee	Danil Yeshchenko	07/10/2022	€26.99	Activated
15	00000120		Clink Boston (a bar)	Danil Yeshchenko	12/10/2022	€758.93	Activated
16	00000121		Clink Boston (a bar)	Danil Yeshchenko	13/10/2022	€14.98	Activated
17	00000123		Thump Coffee	Danil Yeshchenko	21/10/2022	€762.93	Activated

3. All Order Summaries view:

Order Summaries									
OrderPad: All Order Summaries									
24 items • Sorted by Owner Name • Filtered by All order summaries • Updated a few seconds ago									
	Order Su...	PO Nu...	Account	Sales Store	Owner	Sales Representative	Status	Ordered Date	Total
1	00000123		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	21/10/2022, ...	€831.25
2	00000119		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	07/10/2022, ...	€29.15
3	00000118		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	07/10/2022, ...	€796.90
4	00000117		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	06/10/2022, ...	€839.89
5	00000115	45	Thump Coffee	Coffee Store	Lee	Sales Team	Created	04/10/2022, ...	€796.90
6	00000105		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	13/09/2022, ...	€29.15
7	00000104		Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	13/09/2022, ...	€4,716.66
8	00000102	45	Thump Coffee	Coffee Store	Lee	Danil Yeshchenko	Created	13/09/2022, ...	€4,716.66
9	00000101	45	Thump Coffee	Coffee Store	Lee		Created	24/08/2022, ...	€4,332.68
10	00000100	45	Thump Coffee	Coffee Store	Lee		Created	24/08/2022, ...	€190.07
11	00000122		Clink Boston [...]	Coffee Store	Doe		Created	21/10/2022, ...	€18.82
12	00000121		Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	13/10/2022, ...	€18.82
13	00000120		Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	12/10/2022, ...	€826.05
14	00000116	112223...	Clink Boston [...]	Coffee Store	Doe	Sales Team	Created	04/10/2022, ...	€3,847.99
15	00000114	456	Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	04/10/2022, ...	€801.22
16	00000113		Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	04/10/2022, ...	€796.90
17	00000112		Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	04/10/2022, ...	€377.97
18	00000111		Clink Boston [...]	Coffee Store	Doe	Danil Yeshchenko	Created	28/09/2022, ...	€4,815.81
19	00000110	123123	Clink Boston [...]	Coffee Store	Doe		Created	28/09/2022, ...	€164.44

4. My Order Summaries view:

Order Summaries
OrderPad: My Order Summaries

17 items • Sorted by Order Summary ID • Filtered by All order summaries - Is Current User Sales Rep For Order • Updated a few seconds ago

Search this list...

	Order Summary Nu...	PO Number	Account	Sales St...	Owner N...	Sales Representat...	Total	Status	Ordered Date
1	☐ 00000123		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€831.25	Created	21/10/2022, 12...
2	☐ 00000121		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€18.82	Created	13/10/2022, 13...
3	☐ 00000120		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€826.05	Created	12/10/2022, 11...
4	☐ 00000119		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€29.15	Created	07/10/2022, 16...
5	☐ 00000118		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€796.90	Created	07/10/2022, 13...
6	☐ 00000117		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€839.89	Created	06/10/2022, 0...
7	☐ 00000114	456	Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€801.22	Created	04/10/2022, 15...
8	☐ 00000113		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€796.90	Created	04/10/2022, 12...
9	☐ 00000112		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€377.97	Created	04/10/2022, 10...
10	☐ 00000111		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€4,815.81	Created	28/09/2022, 1...
11	☐ 00000109	123123	Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€936.89	Created	28/09/2022, 0...
12	☐ 00000108		Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€5,529.75	Created	16/09/2022, 16...
13	☐ 00000107	123456	Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€4,754.45	Created	16/09/2022, 11...
14	☐ 00000105		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€29.15	Created	13/09/2022, 0...
15	☐ 00000104		Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€4,716.66	Created	13/09/2022, 0...
16	☐ 00000103	11111	Clink Boston (a bar)	Coffee S...	Doe	Danil Yeshchenko	€4,716.66	Created	13/09/2022, 0...
17	☐ 00000102	45	Thump Coffee	Coffee S...	Lee	Danil Yeshchenko	€4,716.66	Created	13/09/2022, 0...

The package also provides a list view for the Order object. It shows all orders created by the user from the AC Orderpad app.

Orders
My Orders

17 items • Sorted by Order Number • Filtered by All orders - Is Current User Sales Rep For Order • Updated a few seconds ago

Search this list...

	Order Number	PO Number	Account Name	Sales Representative	Order Start Date	Order Amount	Status
1	☐ 00000102	45	Thump Coffee	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
2	☐ 00000103	11111	Clink Boston (a bar)	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
3	☐ 00000104		Thump Coffee	Danil Yeshchenko	13/09/2022	€4,331.72	Activated
4	☐ 00000105		Thump Coffee	Danil Yeshchenko	13/09/2022	€26.99	Activated
5	☐ 00000107	123456	Clink Boston (a bar)	Danil Yeshchenko	16/09/2022	€4,366.71	Activated
6	☐ 00000108		Clink Boston (a bar)	Danil Yeshchenko	16/09/2022	€5,078.66	Activated
7	☐ 00000109	123123	Clink Boston (a bar)	Danil Yeshchenko	28/09/2022	€869.34	Activated
8	☐ 00000111		Clink Boston (a bar)	Danil Yeshchenko	28/09/2022	€4,422.71	Activated

View Created Carts as Sales Representative

Navigate to the Carts tab and select the My Carts list view (your admins can change the list view name). You will see all carts where you are a sales representative (all carts you have created from the AC Orderpad app).

Example 1: My Carts - here User can view all carts he has created.

Carts
OrderPad: My Carts

29 items • Sorted by Created Date • Filtered by All carts • Is Current User Sales Rep For Cart • Updated a few seconds ago

Search this list...

	☐ Cart Na...	Account	Store	Owner Na...	Sales Representative	Status	Grand Total Amount ...	Created Date
1	☐ Cart	Thump Coff...	Coffee Store	Emma Lee	Danil Veshchenko	Active	€738.95	25/10/2022, 23:42
2	☐ Cart	Thump Coff...	Coffee Store	Emma Lee	Danil Veshchenko	PendingDelete	€813.94	25/10/2022, 16:00
3	☐ Cart	Thump Coff...	Coffee Store	Emma Lee	Danil Veshchenko	PendingDelete	€719.95	21/10/2022, 14:54
4	☐ Cart	Thump Coff...	Coffee Store	Emma Lee	Danil Veshchenko	Closed	€831.24	21/10/2022, 12:20
5	☐ Cart	Thump Coff...	Coffee Store	Emma Lee	Danil Veshchenko	PendingDelete	€15.00	21/10/2022, 12:17
6	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	Active	€8.97	21/10/2022, 12:16
7	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	PendingDelete	€2.99	21/10/2022, 12:16
8	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	PendingDelete	€2.99	21/10/2022, 12:15
9	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	PendingDelete	€2.99	21/10/2022, 12:15
10	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	PendingDelete	€0.00	21/10/2022, 09:44
11	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	Closed	€18.82	18/10/2022, 12:47
12	☐ Cart	Clink Bosto...	Coffee Store	Albert Doe	Danil Veshchenko	PendingDelete	€774.98	13/10/2022, 13:32

Example 2: My active Carts - here User can view all the cart that was not finished - he can continue and finalize the previously created order.

Carts
Orderpad: My Active Carts

2 items • Sorted by Created Date • Filtered by All carts • Status: Is Current User Sales Rep For Cart • Updated a few seconds ago

Search this list...

	☐ Cart Name	Account	Store	Owner Name	Sales Representative	Status	Grand Total Amount in Cart	Created Date
1	☐ Cart	Thump Coffee	Coffee Store	Emma Lee	Danil Veshchenko	Active	€738.95	25/10/2022, 23:42
2	☐ Cart	Clink Boston (a ...	Coffee Store	Albert Doe	Danil Veshchenko	Active	€8.97	21/10/2022, 12:16

Example 3: All Active Carts - here User can browse all unfinished carts, created not only by him but by any User including Buyers.

Carts
OrderPad : All Active Carts

5 items • Sorted by Created Date • Filtered by All carts • Status: Type • Updated a few seconds ago

Search this list...

	☐ Cart Name	Account	Store	Owner Name	Sales Representative	Status	Grand Total Amou...	Created Date
1	☐ Cart	Thump Coffee	Coffee St...	Emma Lee	Danil Veshchenko	Active	€738.95	25/10/2022, 23:42
2	☐ Cart	Clink Boston (a bar)	Coffee St...	Albert Doe	Danil Veshchenko	Active	€8.97	21/10/2022, 12:16
3	☐ Cart	Clink Boston (a bar)	Coffee St...	Albert Doe	Sales Team	Active	€3,526.98	04/10/2022, 17:32
4	☐ Cart	Clink Boston (a bar)	Coffee St...	Albert Doe		Active	€104.30	28/09/2022, 11:55
5	☐ Cart	Thump Coffee	Coffee St...	Emma Lee		Active	€113.13	24/08/2022, 17:12

View Created Orders as Buyer

In the store, go to the Orders page. If a sales representative created an order on your behalf, you will see their name next to the order details.

My Orders

Filter by date: Start Date: 08/08/2021 End Date: 08/08/2022 Apply Reset Sort items by most recent order ▼

3 items

Order Summary Number: 00000102 Sales Representative: Sys Admin	Ordered Date: 8/8/2022, 19:15	Status: Created	Total: €2,796.78	START REORDER View Details
Order Summary Number: 00000101 	Ordered Date: 5/8/2022, 14:31	Status: Created	Total: €5,196.63	START REORDER View Details
Order Summary Number: 00000100 Sales Representative: SalesRep User	Ordered Date: 5/8/2022, 13:52	Status: Created	Total: €881.22	START REORDER View Details



Get In Touch

AC Orderpad 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