Cybersource

Salesforce Order Management Technical Guide

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1. Introduction

The Salesforce Order Management app brings together tools that help you manage orders while delivering seamless, omnichannel commerce experiences to your customers. It is integrated with B2C Commerce and natively supports Service Cloud to provide a single view of order and service history.

With Salesforce Order Management:

- Consumers can submit orders from any commerce channel and then track and manage their orders throughout the order lifecycle.
- Merchants can manage order fulfilment, shipping, payment capture, invoicing, and service by using integrated and customizable business processes and workflows.
- Service agents can access a master repository of all order-related information to see a global view of the entire order lifecycle, and process cancellations and returns.
- Merchants can utilize the newly added Order on Behalf Of (OOBO) flow to Authorize a payment on behalf of a customer and save the card details for future use.

2. Release Notes

Version 2.8

- Order on Behalf Of (OOBO) to support Authorization
- Supports Payment Card capture mechanism using Microform v2
- Supports Message Level Encryption (MLE)
- Token Management System (TMS) to support create, update and deletion of card tokens
- Salesforce API Upgrade
- Klarna Capture support

Version 2.7

- Removal of null values from the Capture & Refund payloads

Version 2.6

- Enhancement in Set Payment Configuration (Visible Rest Key Id and Masked shared secret).

Version 2.5

- Bug fix for Capture service for PayPal payment method
- Bug fix for Refund service for PayPal payment method
- HTTP header changes as per Cybersource mandate
- Changed Merchant Credentials setting (Payment Configuration) for security reasons

Version 2.1.0

- Capture for Klarna payment method
- Refund for Klarna payment method

Version 2.0.0 (May 15, 2022)

- Capture for PayPal payment method

- Refund for PayPal payment method

Version 1.1.0

- Multi-capture capabilities for credit card, Apple Pay and Google pay

Version 1.0.0

- Capture for credit card, Apple Pay and Google Pay
- Refund for credit card, Apple Pay and Google Pay

3. Configuration and Setup

If you are new to Cybersource and would like to start using Cybersource managed package quickly, begin by signing up for a Sandbox Account.

You will also need to create an API Key and API Shared Secret Key that you can use to authenticate requests to our sandbox server. Follow the same steps to generate the Production key and shared secret.

Follow the below steps for configuration and setup.

To integrate with Salesforce B2C Commerce, follow these steps:

- Click on "**Setup**"
- In the search bar, type in "**B2C Commerce Connections**".
- Select "**New Connection**".
- Enter a connection name and the B2C instance ID.
- Click "**Save**".
- Log in to Commerce Cloud and navigate to "**SFCC > Administration > Global Preferences > Salesforce Order Management**".
- Set the integration state to "**Active**".
- To allow connection types, enable "**Allow Tenant Linkages**" in the organization.
- Under "**Connection Types**", add "**Order Integration**", "**Cart and Checkout Data**".
- Click "**Save**".

You will receive a confirmation email after completing these steps.

Step 1: Payment Gateway Provider

Creating Payment Gateway Provider is currently NOT available within the UI and should be done through **workbench** by connecting to your organization:

1. Endpoint to be used - (MD/ToolingAPI): **/services/data/v58.0/tooling/sobjects/PaymentGatewayProvider**
2. Payload:

```
{
"ApexAdapterId": <ID of PTS_PaymentAdapter.cls apex class>,
"DeveloperName": "Cybersource_Provider",
"MasterLabel": " Cybersource_Provider ",
"IdempotencySupported": "Yes",
 "Comments": "Comments"
 }
```

Step 2: Named Credential

The Package comes with a default named credential – **Payment** that points to Cybersource's Test endpoint https://apitest.cybersource.com and **Payment_Live** that points to Cybersource's Production endpoint https://api.cybersource.com

Step 3: Payment Gateway

Create a Payment Gateway Record by following these steps:

1. Click on **App Launcher > Payment Gateways**.
2. Click **New**.
3. Enter the required details.
4. Click **Save**.

Field	**Description/Value**
Payment Gateway Name	**Cybersource_Test** (for test) **Cybersource_Live** (for production)
Payment Gateway Provider	Name of your payment gateway provider created in Step 1
Merchant Credential	**Payment** (for test) **Payment_Live** (for production)
Status	Set to **Active** to enable
External Reference	This value will be the **Processor ID** from your Salesforce commerce cloud instance. You can see your processor ID by navigating to **Merchant Tools > Ordering > Payment Processors** in your Salesforce commerce cloud instance. For payment methods, navigate to **Merchant Tools > Ordering > Payment Methods.** To see which payment processor is associated with the payment method, click on the payment method, and scroll down to see the payment processor associated with it.

	<u>NOTE</u>: If you are using different payment processors, then you need to create different payment gateway records for each payment processor each having a unique payment processor ID on the External Reference field.
Comments	Any comments that you want to assign.

Table 1: *Field name and description for Payment Gateway record*

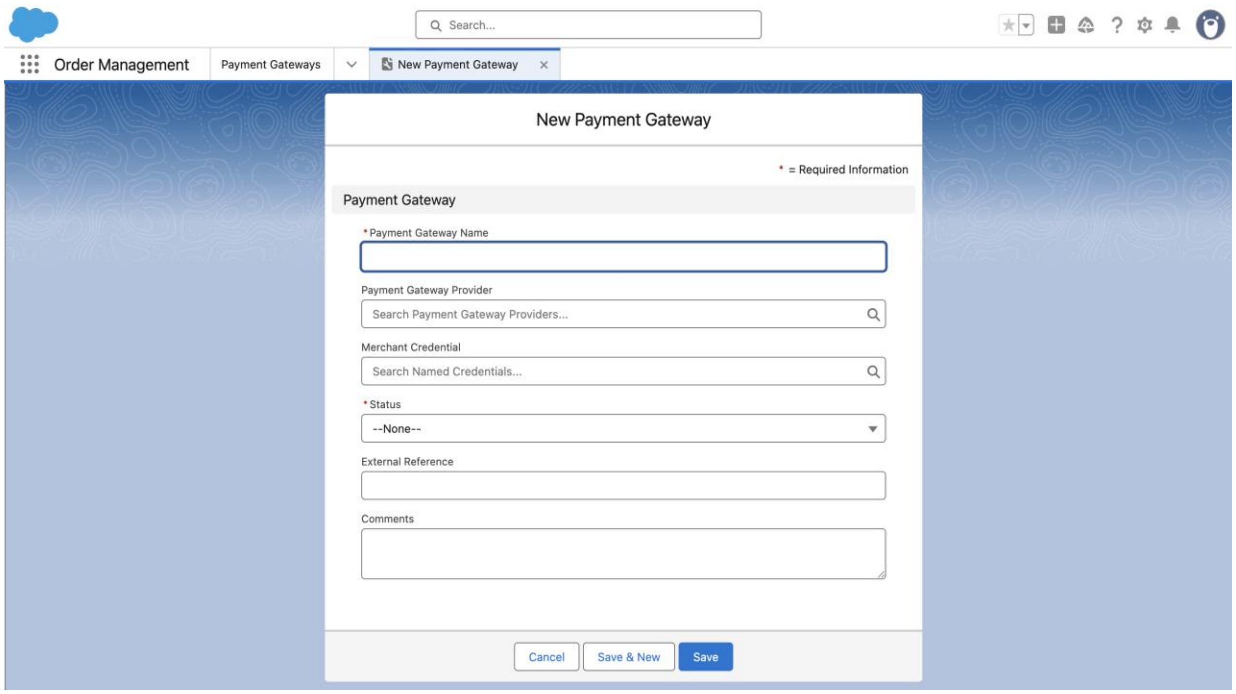


Fig 1: *Sample Image of Payment Gateway*

Step 4: Permission Set Assignment

Admin User

Permissions need to be added to the Admin User for our app to function

1. Click **Setup** > **Users**
2. Select Admin user and click Edit Assignments on Permission Set Assignment
3. Add **Payment Configuration Access** permission set to Admin User.

Step 5: Activate Create Invoice and Ensure Funds flow

1. Click **Setup**.
2. In the quick find box, enter **Flow**.
3. Search and select and open **Activate Create Invoice and Ensure Funds** flow.
4. Click **Activate**.

Step 6: Payment Configuration

1. Click **App Launcher > Set Payment Configuration.**

2. Click **New**.
3. Enter the required details:
4. Click **Save**.

Field	Description/Value
Store Name	Select the name of the store the configuration is going to be applied to
Merchant ID	The transacting Merchant ID (MID) assigned to you by Visa Acceptance Solutions.
End Point	Choose TEST or PRODUCTION (LIVE)
REST Key ID	The Key from your REST API Shared Secret Key
REST Shared Key	The Shared Secret from your REST API Shared Secret Key
Developer ID	Enter NONE
Allowed Card Networks	Set the accepted card networks. If no value is set, VISA will be allowed as default. Applicable only for OOBO
Enable Save Card	Check this checkbox to allow your customers to save their cards for future transactions. Additional steps are required to support this in your B2B/D2C store. Please see Tokenization for details. Applicable only for Order on Behalf Of (OOBO)

Table 2: *Payment Configuration record*

For instructions on how to generate a Key ID and shared key in the Business Center, see the Getting Started guide.

Step 6.1: Message Level Encryption

Message Level Encryption (MLE) uses certificates that ensures each message is securely encrypted and tied to the sender's verified identity, without needing to share secret keys in advance. This provides stronger authentication, easier key management, and better protection against fraud or tampering.

A shared secret uses the same key for both sending and receiving messages, meaning both parties must securely exchange and protect that key in advance. While it can be simpler, it offers less identity verification and can be more vulnerable if the key is compromised.

Prerequisite: - Using Message Level Encryption requires a .p12 certificate to be created link

Step 6.1.1: Upload Certificate

1. Convert the p12 certificate to .pem format in open ssl using this below command.
   openssl pkcs12 -in test.p12 -cacerts -nokeys -out cert.pem

2. Upload the generated pem file in static resources.
    i. Click **Setup**
    ii. In the quick find box, enter the **Static Resources**
    iii. Click on **New** button iv. Enter a unique name and upload the .pem file
    iv. Click Save

Step 6.1.2: Enable Message Level Encryption

Field	Description/Value
Enable Message Level Encryption	Check checkbox to enable. Applicable only for OOBO
REST Certificate	RESTCertificate (keyFileName): Add the name of the static resource given when uploading the certificate. Applicable only for OOBO.

***Table 2.1**: Payment Configuration Record for MLE*

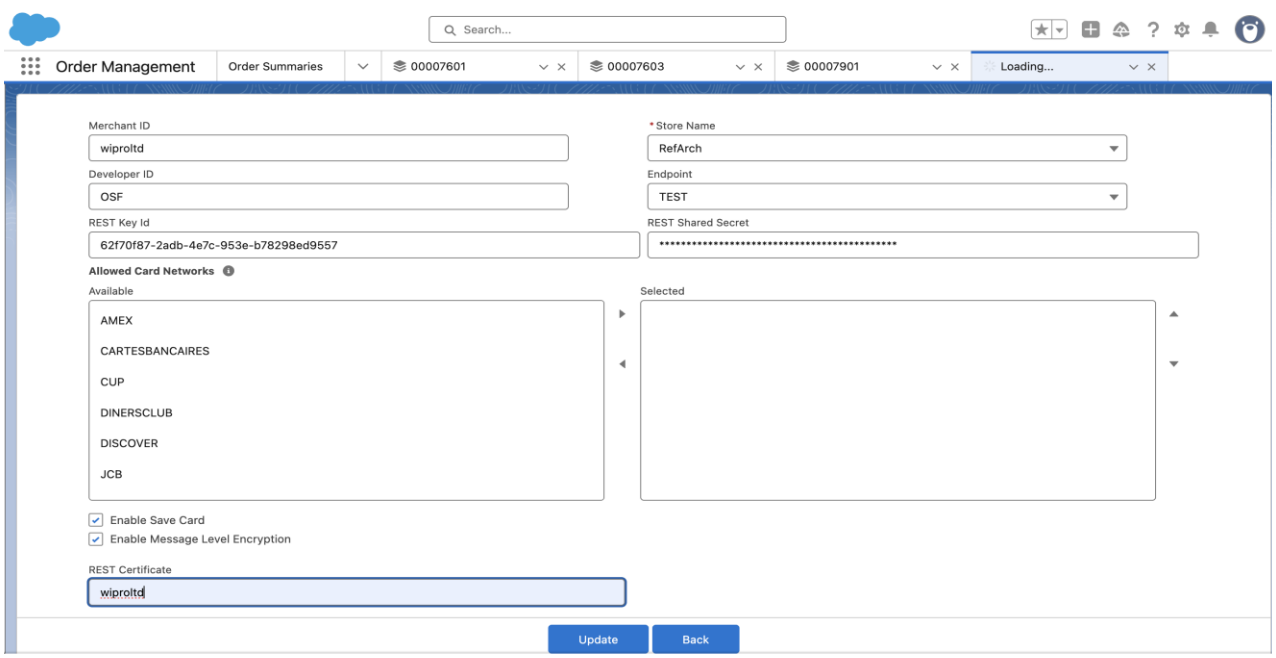


***Fig 2:** example image for Payment Configuration record*

NOTE:

- **Payment_Confg__c** custom object has been deprecated from "**Cybersource for Lightning Order Management v1.4"**.
- **'Payment Configuration'** custom metadata has been deprecated from "**Cybersource for Lightning Order Management v2.0**".

Step 7: Platform Cache

Ensure that a Platform Cache partition has been created with Partition Name as 'AccessToken' and 'AllowedCapacity' value as 3.

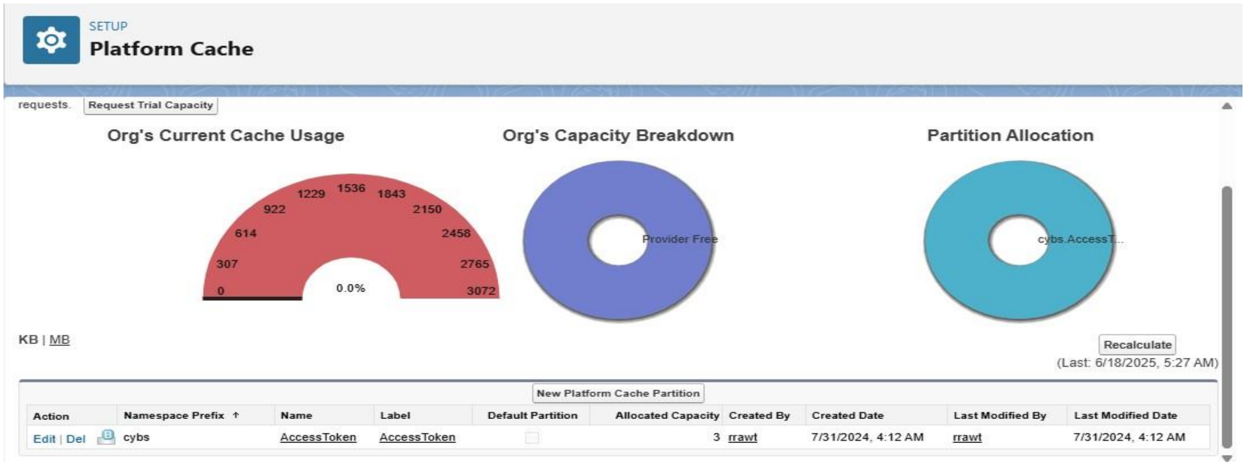


Fig 3: Platform cache

If the platform cache does not exist, create new platform cache. Create Platform Cache by following Steps:

1. Click **Setup**
2. In the quick find box, enter **platform cache**
3. Create New
4. Set the label as – **AccessToken**
5. Allocate Session Cache as 3

Note: Create platform cache only if it does not exist

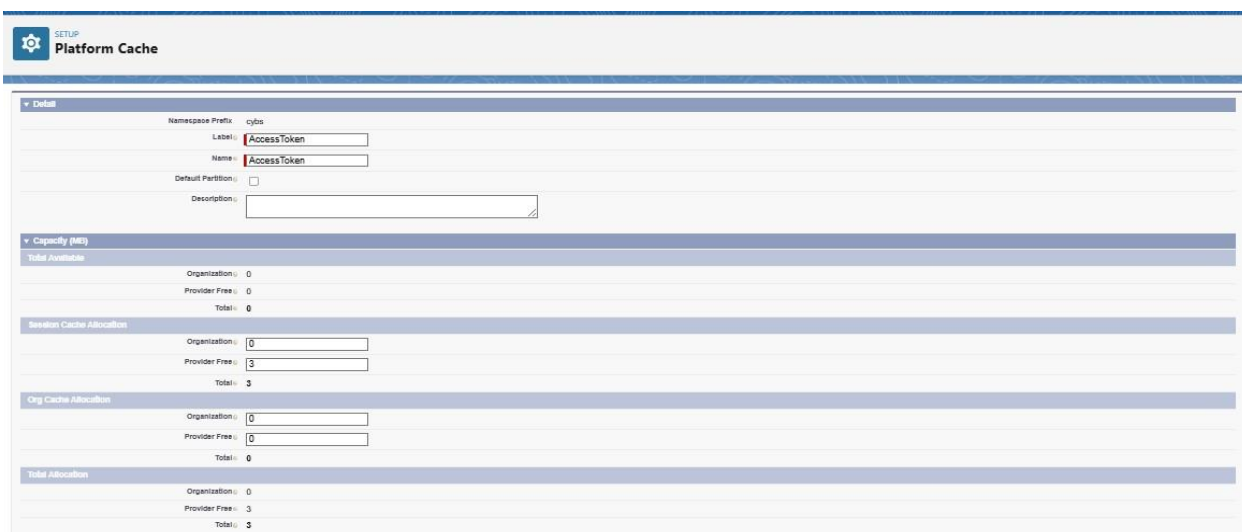


Fig 4: Platform Cache

Step 8: Order on Behalf of (OOBO) Configuration

To configure Order on Behalf of (OOBO), follow the steps below.

Step 8.1: Create Actions & Recommendations

Create Actions & Recommendations by following steps:

1. Click **Setup**
2. In the quick find box, enter **Actions & Recommendations**
3. Click **New Deployment**

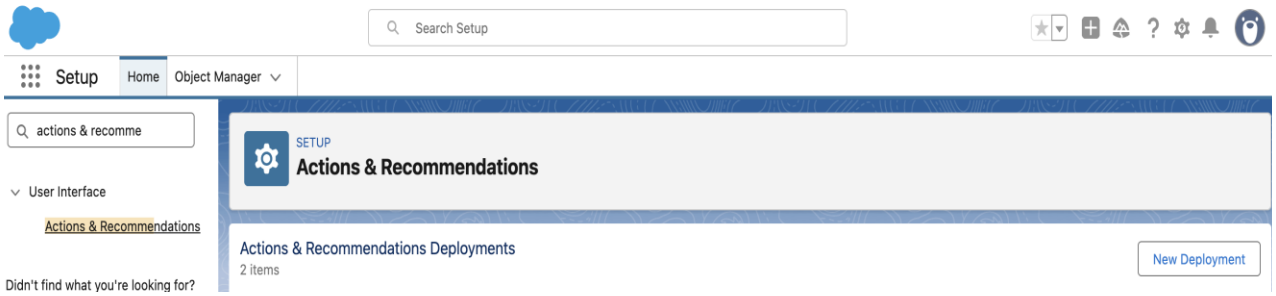


***Fig 5:** Actions & Recommendations*

4. Enter Label and API name as **Cybersource Order on Behalf Of** and click **Next**

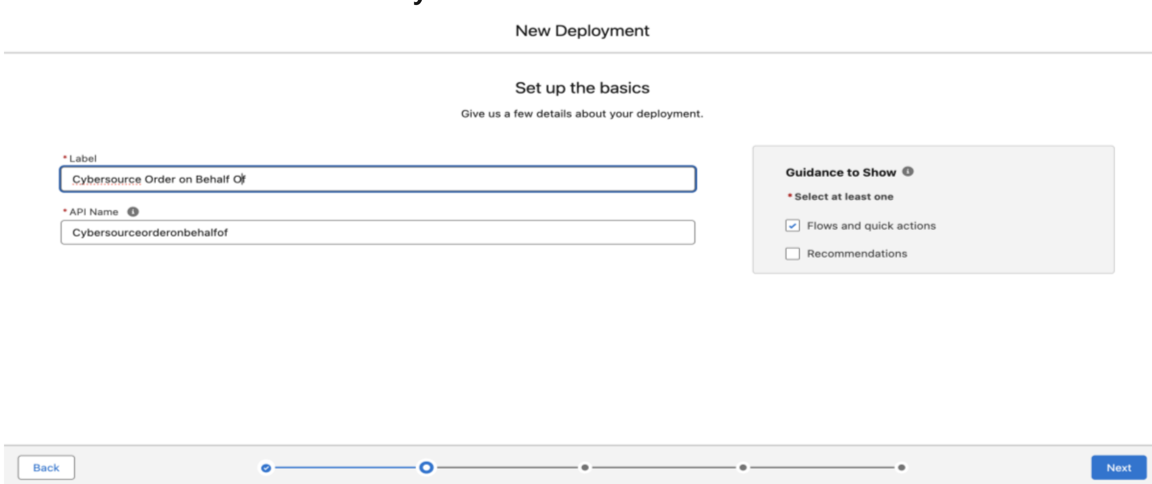


***Fig 6:** Actions & Recommendations*

5. From the Available objects, select '**Account**' and click **Next**

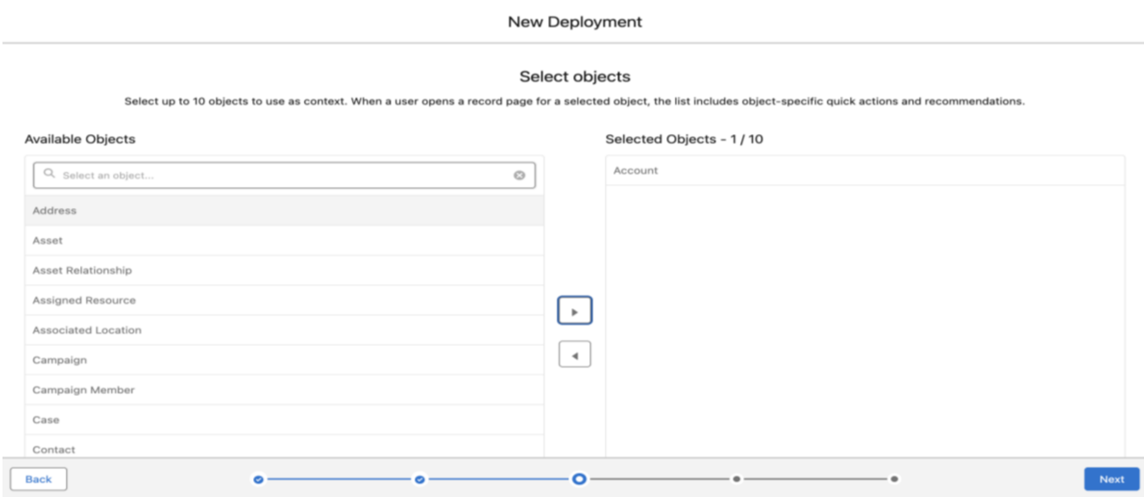


Fig 7: *Actions & Recommendations*

6. Search for **Cybersource order on Behalf of – Flow**. Drag and drop in Action & Recommendation and click **Next**

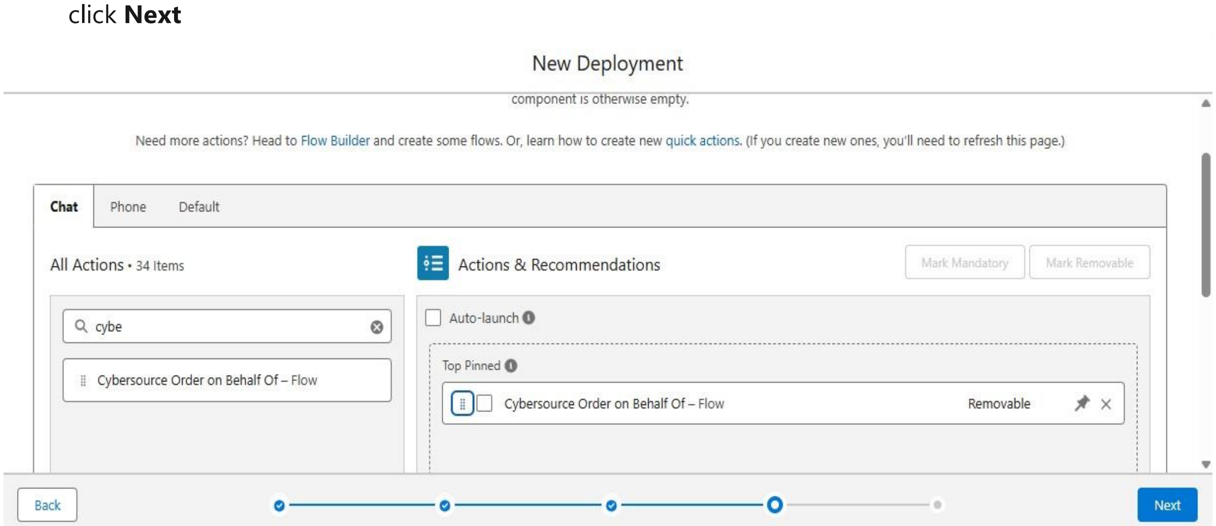


Fig 8: *Actions & Recommendations*

7. Select Only **Cybersource order on Behalf of** and click **Save**

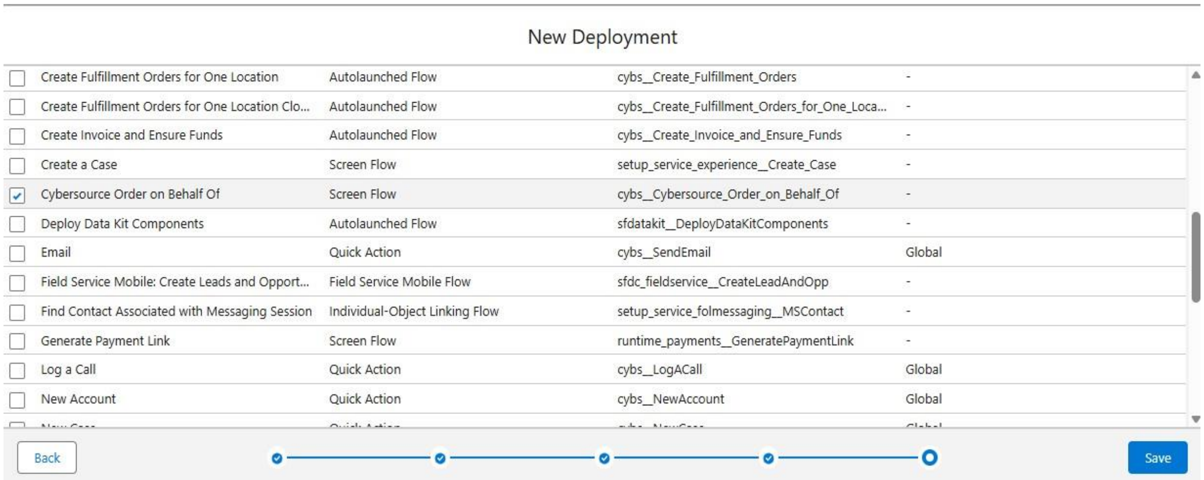


Fig 9: *Actions & Recommendations*

Step 8.2: Create Account Lightning Record Page

Create Lightning record page for account. Add the Actions & Recommendation created in [Step 8.1](#) and the LWC component by following steps:

1. Open any Account record
2. Click on setup and select **Edit page**

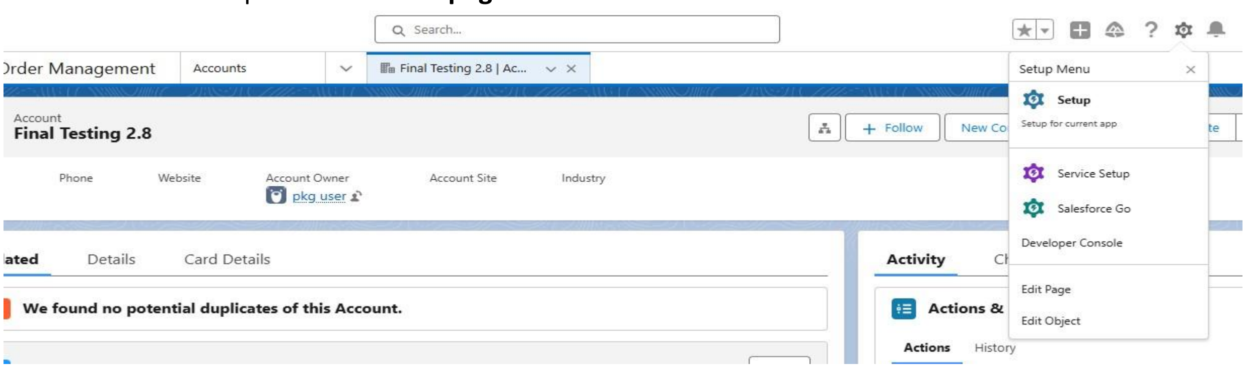


Fig 10: *Account Record Page*

3. From the left standard panel, Select **Actions & Recommendations**. Drag and drop above the Activity section
4. Select **Cybersource order on Behalf of** in the **Actions & Recommendations Deployment** search bar.

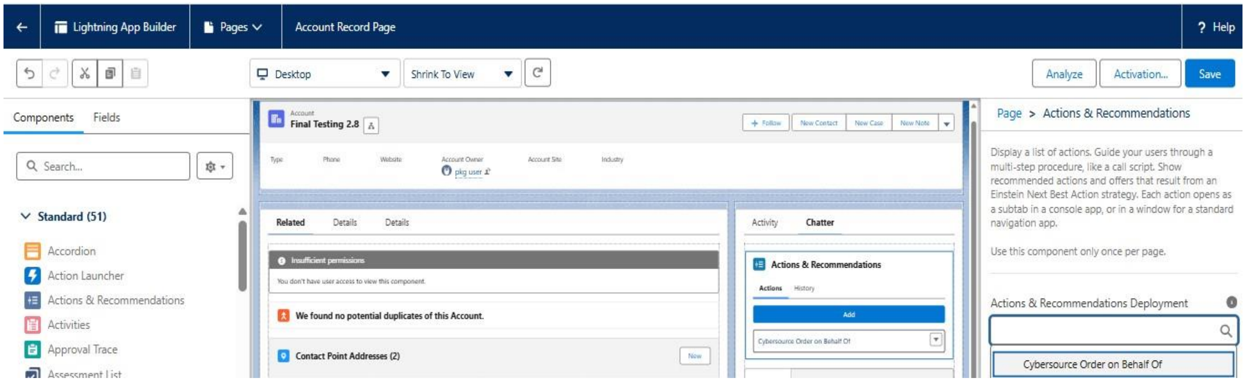


Fig 11: Add Actions & Recommendations

5. Select **Related Tab** section and from the right-side panel, click **Add Tab**
6. Select **Custom** from the options. Provide the custom label as **Card Details** and click **Done**

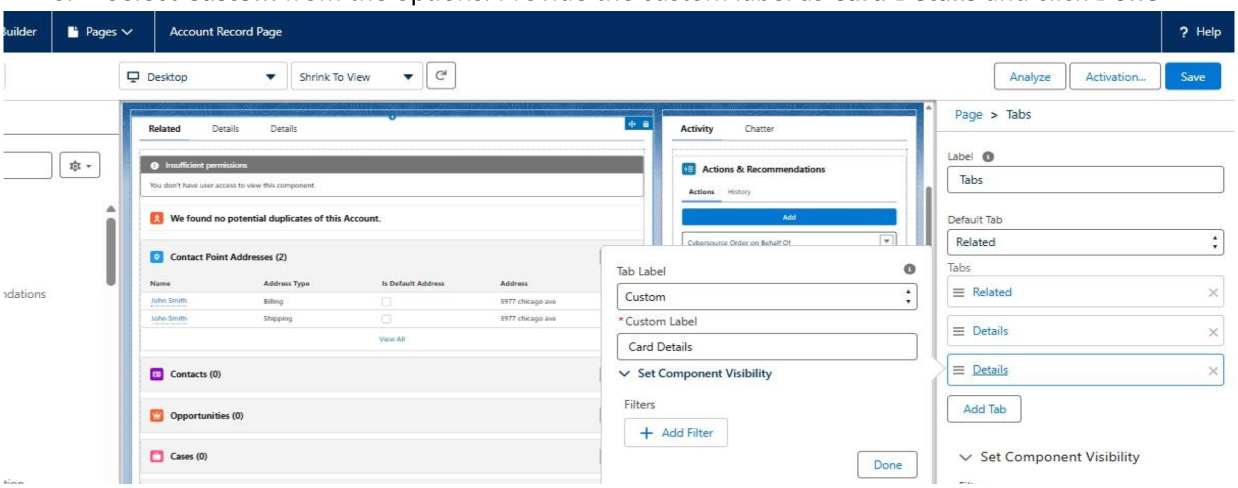


Fig 12: Tab Creation

7. New tab with name **Card Details** will be added
8. From the left side panel, search for **pTS_savedPaymentMethodsSOM.** Drag and drop in the **Card Details** tab.

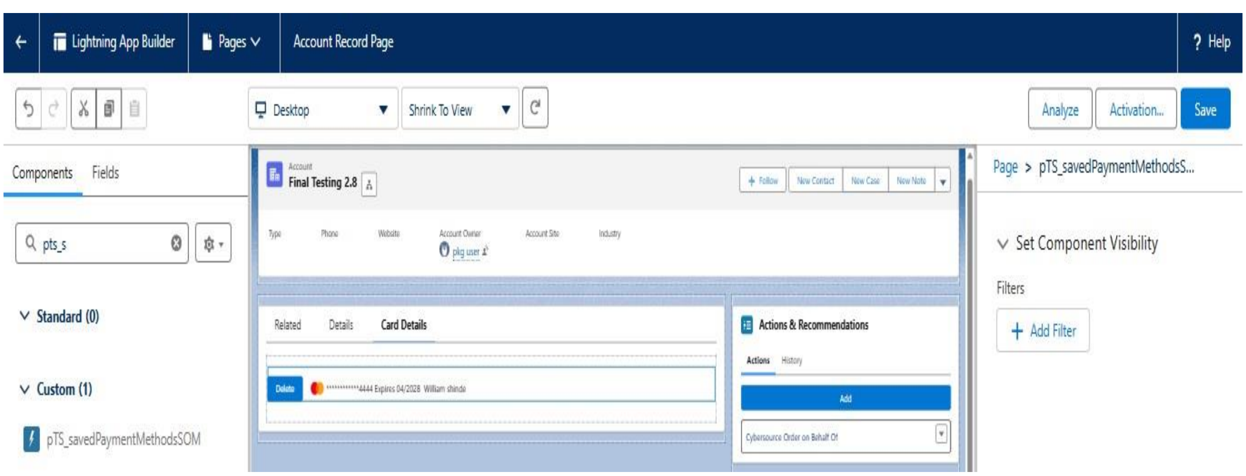


Fig 13: Add component in Card Details Tab

9. Click **Save.**
10. Click on **Activation** and select the options based on the requirement. If no specific requirement, select **Assign as Org Default.**

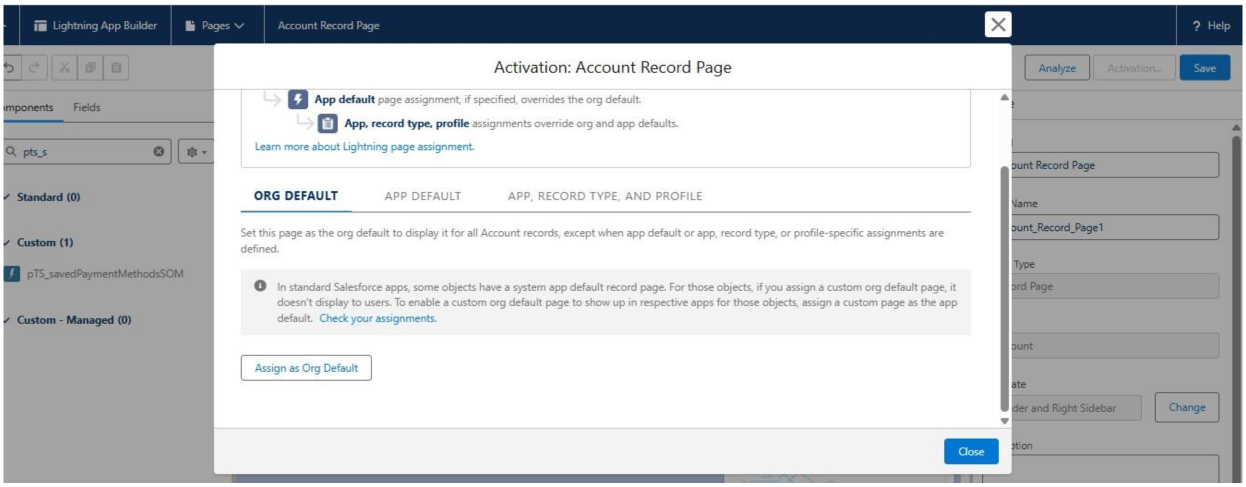


Fig 14: Activation & Save

Step 8.3: Create Contact Point Address and Delivery Methods records

Create Contact point address and Order delivery method records by following steps:

1. From Account record, go to Related List tab
2. Click on **New** for creating contact point address records.
3. Create contract point address records for both **Billing** and **Shipping** address type.

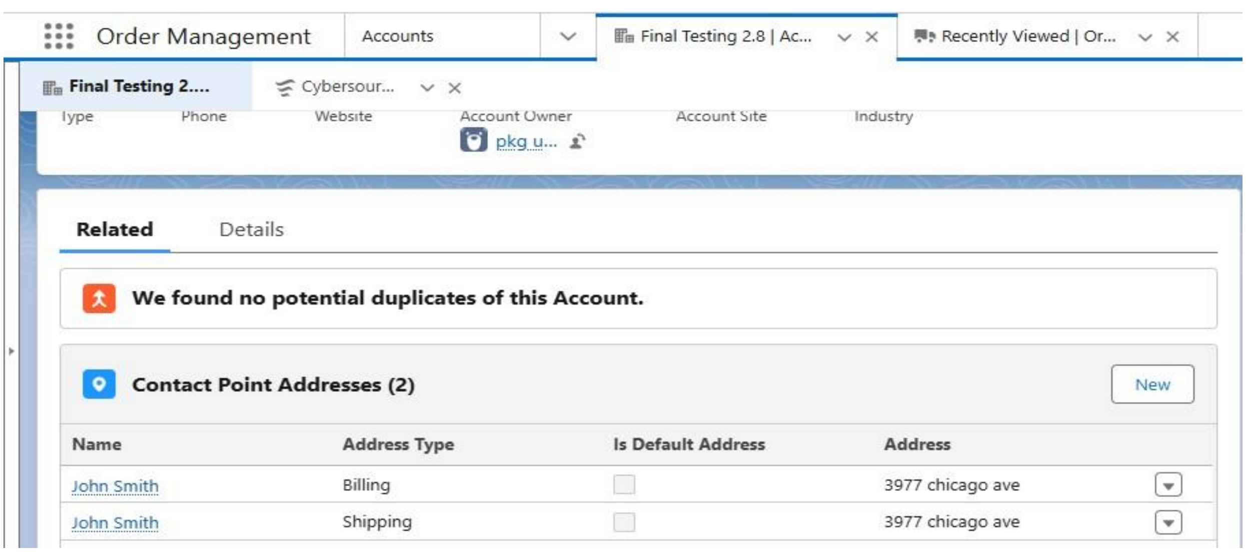


Fig 15: Create Contact Point Address records

4. Click **App Launcher**
5. Select Order Delivery Methods and click on **New**

   Note: Order Delivery Methods records must reflect the same shipping address as specified in the B2C instance that is integrated with our salesforce org.

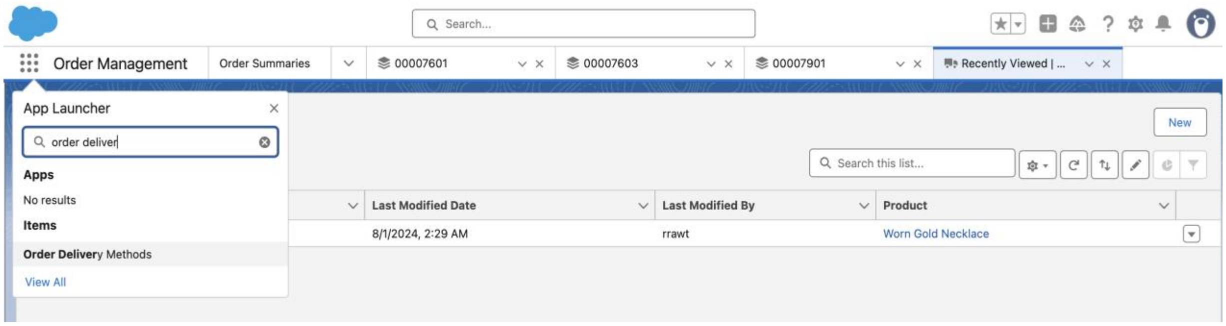


***Fig 16:** Create Order Delivery Method records*

Step 9: Configure the Payment Method (Optional)

To configure PayPal and Klarna, please refer to Steps 1 to 6 in Section 3. For Klarna, ensure that you also follow the supplementary steps provided below.

Create Custom Payment Method for Klarna: -

Refer to the Salesforce Order Management Developer Guide, page 128, for more information about creating a custom payment method.

1. To configure a custom payment method as an AlternativePaymentMethod, create a RecordType for the AlternativePaymentMethod object and name it Klarna.
2. Endpoint to be used - (MD/Tooling API): -

   /services/data/v51.0/sobjects/RecordType

   Payload:

{
"Name": "KLARNA",
"DeveloperName": "klarna",
"SobjectType": "AlternativePaymentMethod"
}

For information on creating record types, refer Create Record Types (Salesforce.com)

1. Creating Payment GtwyProvPaymentMethodType record is currently NOT supported from the UI and should be done through Workbench by connecting to your organization
2. Endpoint to be used - (MD/Tooling API): -

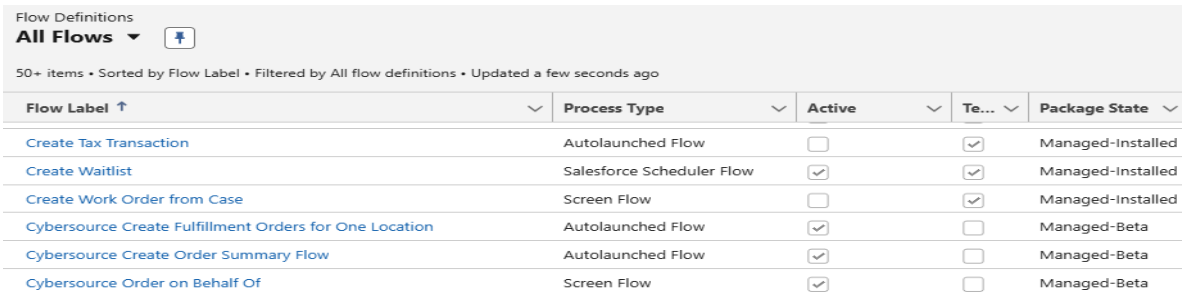
   /services/data/v58.0/sobjects/GtwyProvPaymentMethodType

   Payload:

{
"DeveloperName": "Klarna",
"MasterLabel": "Klarna Payment",
"GtwyProviderPaymentMethodType": "KLARNA",

"PaymentGatewayProviderId":<Id of PaymentGateway Provider>,
"PaymentMethodType": "DigitalWallet",
"RecordTypeId":<ID of Record type in Alternate Payment Method if PaymentMethodType is AlternativePaymentMethod>
}

3. Make sure the following flows are active,
   - Cybersource Create Fulfilment Orders for One Location
   - Cybersource Create Order Summary Flow



Flow Definitions
All Flows
50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Active	Te...	Package State
Create Tax Transaction	Autolaunched Flow	☐	☑	Managed-Installed
Create Waitlist	Salesforce Scheduler Flow	☑	☑	Managed-Installed
Create Work Order from Case	Screen Flow	☐	☑	Managed-Installed
Cybersource Create Fulfillment Orders for One Location	Autolaunched Flow	☑	☐	Managed-Beta
Cybersource Create Order Summary Flow	Autolaunched Flow	☑	☐	Managed-Beta
Cybersource Order on Behalf Of	Screen Flow	☑	☐	Managed-Beta

***Fig 17**: Flows*

4. Assign the created Klarna record type to the 'Order Management B2C Service' permission set by following these steps:
   - Click **Setup**
   - Search ‘Permission sets’ and select. Open ‘Order Management B2C Service’ permission set.
   - Select Object Manager and search ‘Alternative Payment Methods’
   - Click edit and assign ‘Klarna’ record type

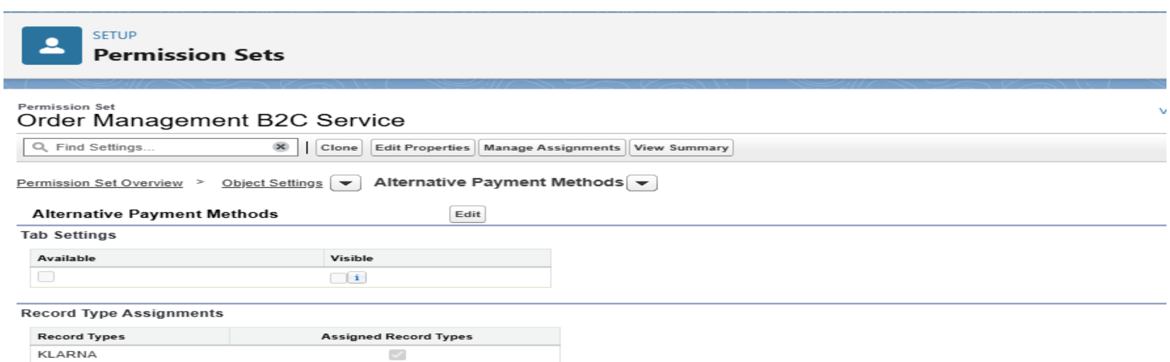


***Fig 18**: Record type Assignment for Permission set*

Set the GtwyProvPaymentMethodType fields as described here: -

Field	Description/Value
Comments	Optional description
Developer Name	The unique API name of the record
Master Label	A human-readable name for the record

Gateway Provider Payment Method Type	The name of the payment method in the storefront. This value must exactly match the payment method ID used in B2C Commerce
Payment Gateway Provider ID	Reference to the Payment Gateway Provider record associated with the payment processor for the payment method
Payment Method Type	Can use AlternativePaymentMethod, CardPaymentMethod or DigitalWallet. To use **AlternativePaymentMethod**, first create a corresponding **RecordType** record
Record Type ID	This value is a reference to the RecordType record of AlternativePaymentMethod

Table 3: *Field name and description for GtwyProvPaymentMethodType record*

4. Order on Behalf Of (OOBO) - Flow

For Order on Behalf of (OOBO), Payment Card Authorization and Tokenization are supported.

4.1 Authorization

For Authorization flow, please follow the below steps:

1. Select **Cybersource Order on Behalf Of** from the **Actions & Recommendations** in account page

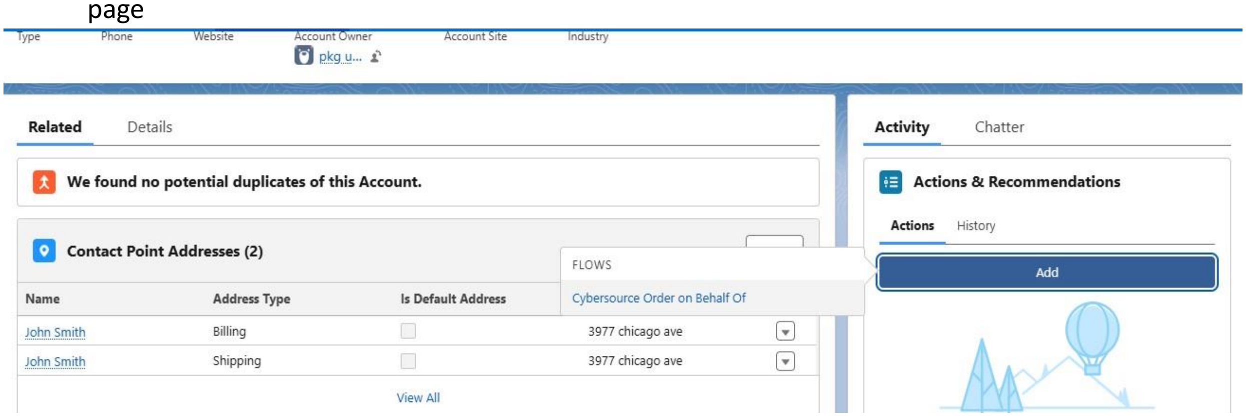


Fig 19: *Cybersource Order on Behalf of*

2. Select the store name and click **Next**

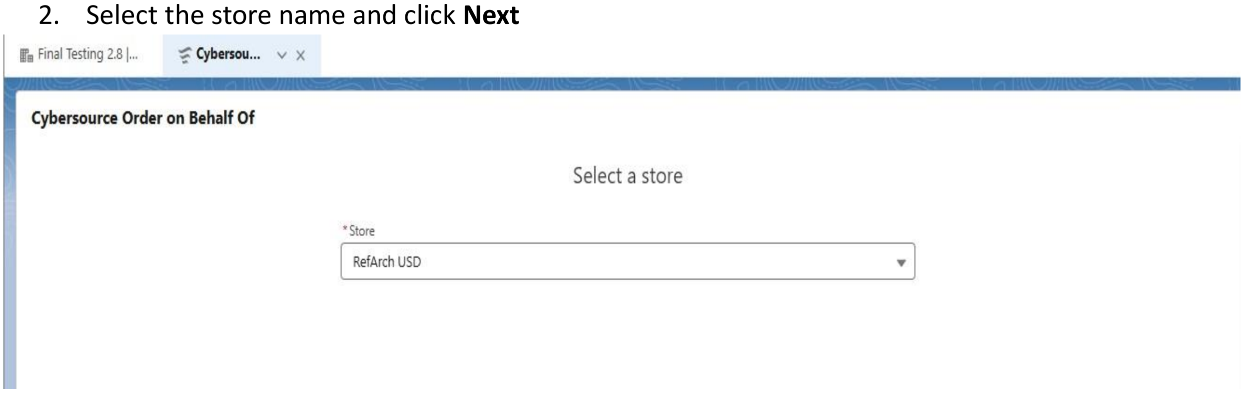


Fig 20: *Store selection*

3. Select the products and click **Next**

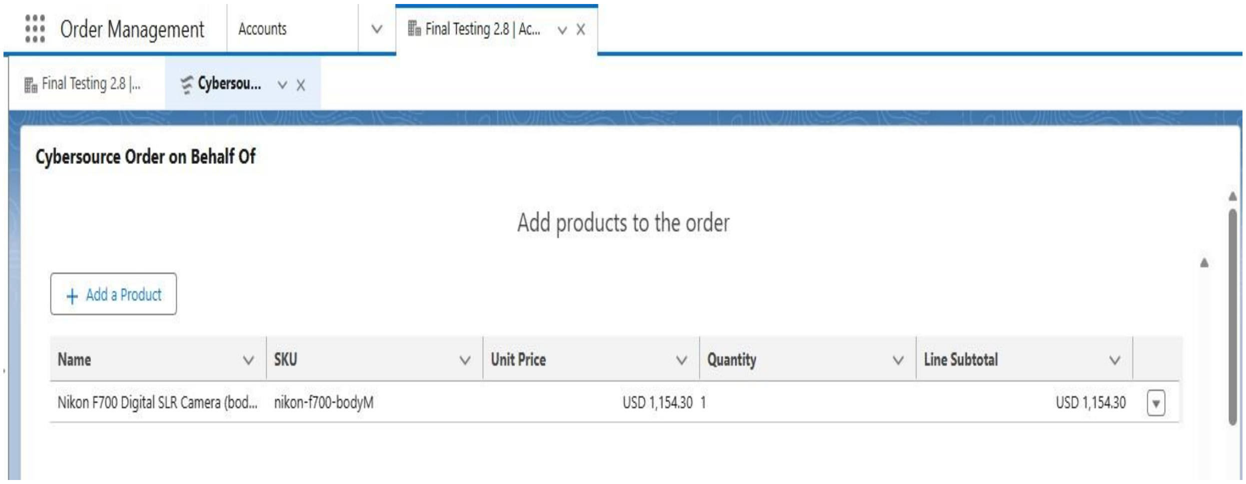


Fig 21: *Add products to the order*

4. Enter the shipping address details and click **Next**

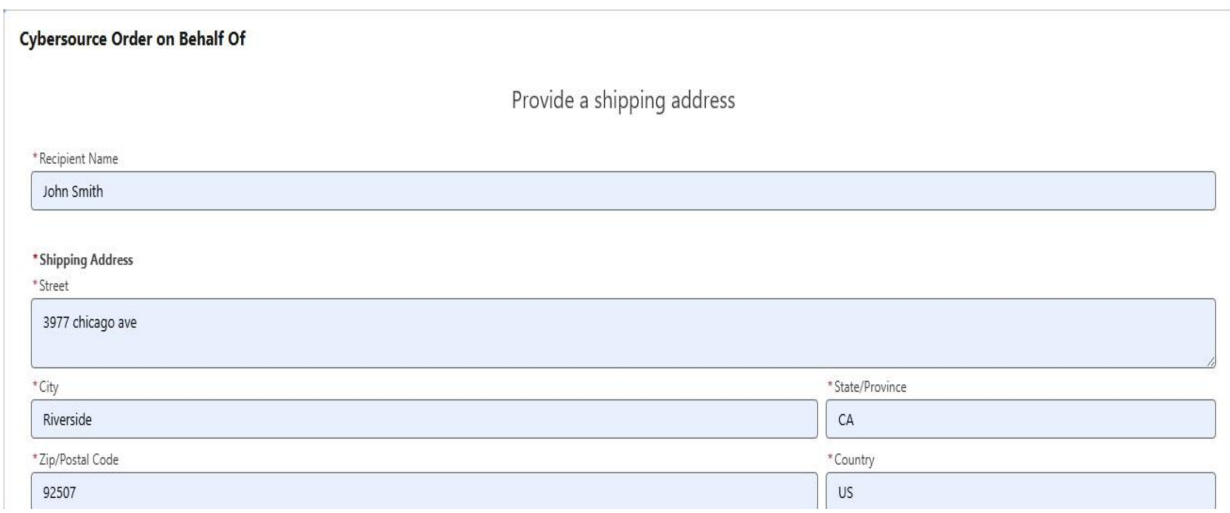


Fig 22: *Provide a shipping address*

5. Select the delivery option. The Order delivery methods we created in section 3 in Step 8.3 will get populated and click **Next**

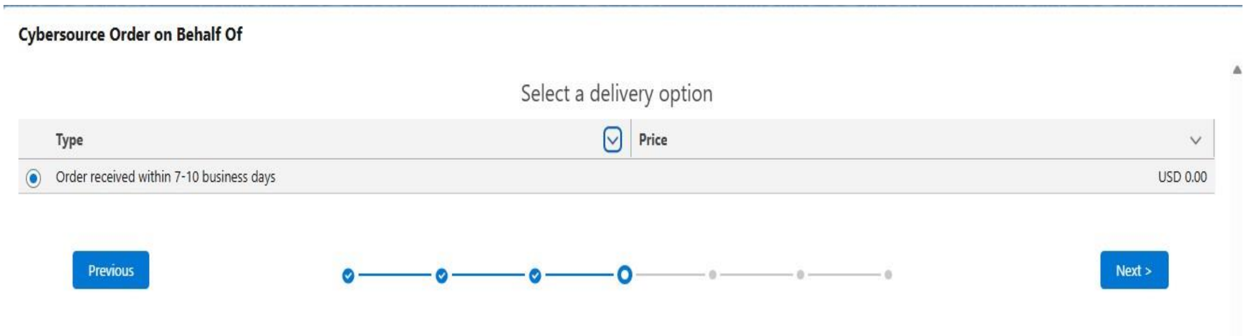


***Fig 23**: Select a delivery option*

6. Review all the product details with amount and click **Next**

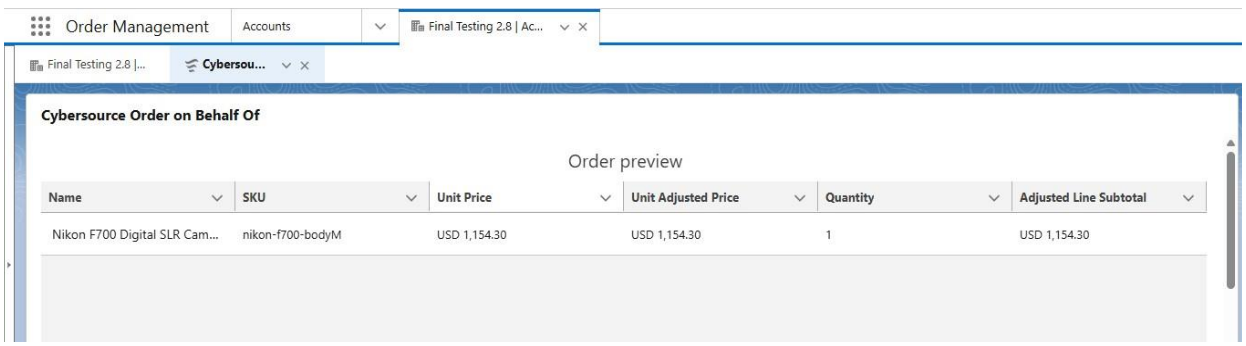


***Fig 24**: Order preview*

7. Provide all the payment details as required and click on next to make a payment.

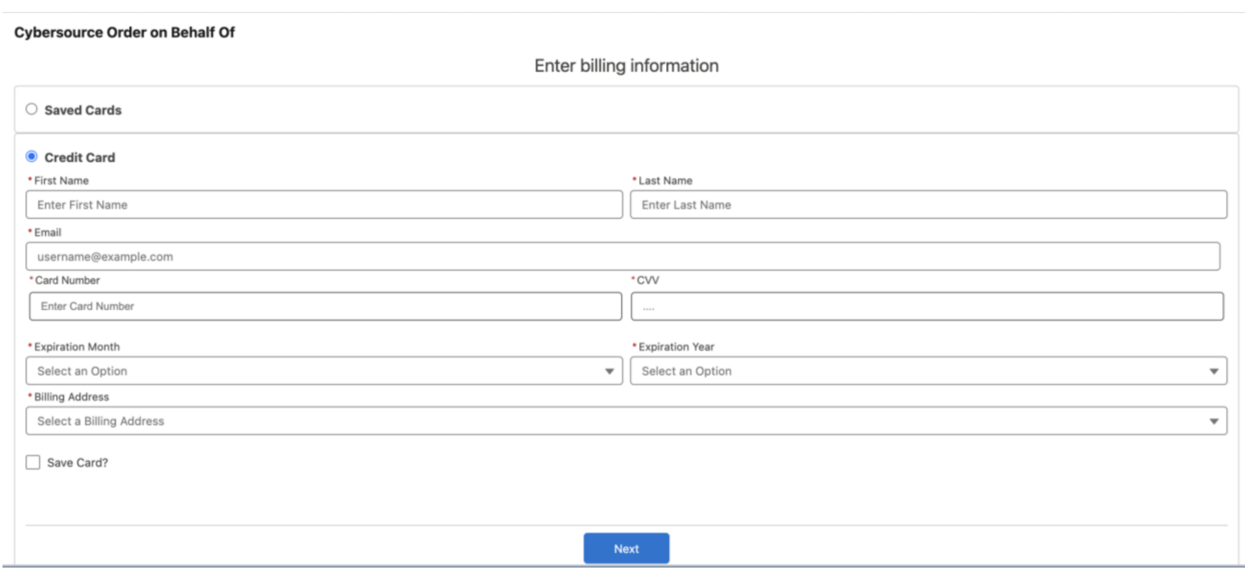


***Fig 25:** Payment component*

4.2 Tokenization

Token Management capabilities have been added to Order Management. Users can now manage their tokens, including

- Save for future use
- Delete

For tokenization flow, please follow the below steps:

- When Enable Save Card checkbox is enabled in Set Payment Configuration, TMS support will be activated and the option to save a card will be available in checkout.

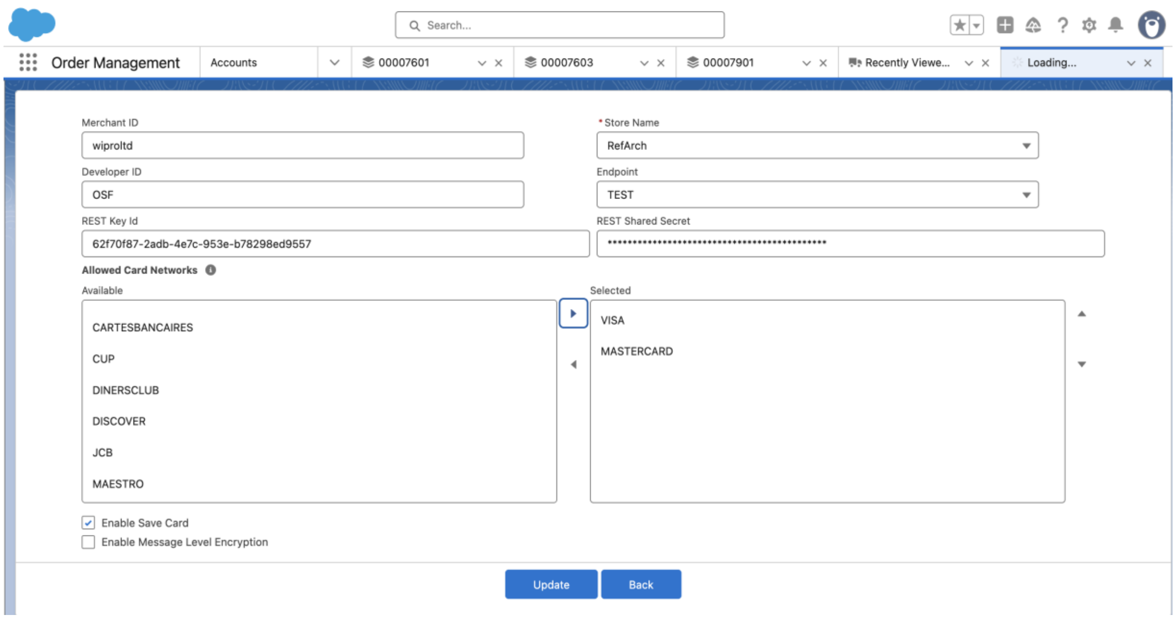


Fig 26: *Set Payment Configuration component*

- When placing or creating an order using OOBO, select the **Save Card** checkbox after entering the card details
- If Save Card? is selected when making a payment, the card details will be saved for future use.
- To use a saved card for a new payment, select Saved Cards on the checkout screen to select a card.
- The saved cards will be displayed in the card details section of the related account page, from where you can now delete the saved cards

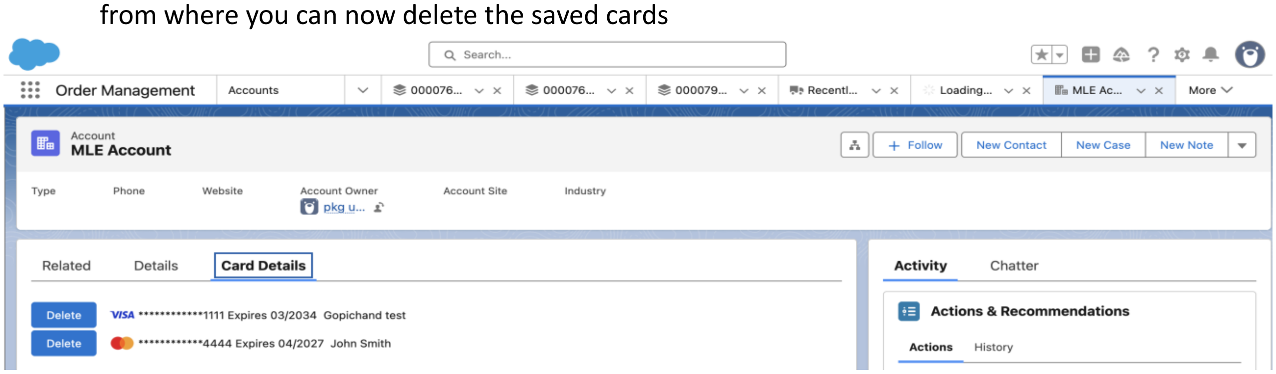


Fig 27: *Saved card in Account page*

- ***Note:*** Verify below custom labels are available

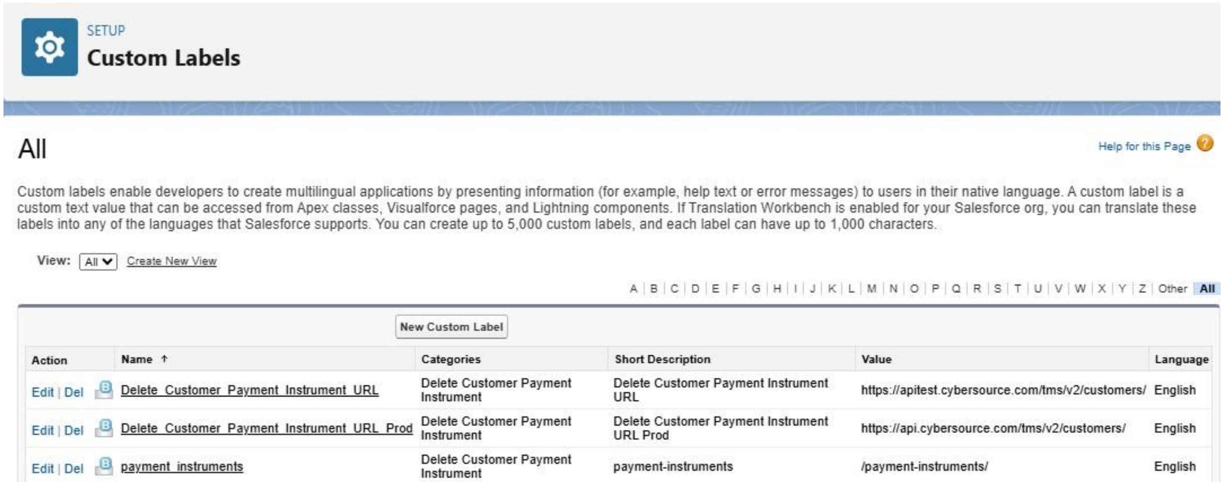


Fig 28: *Custom Labels*

5. Ready to Go Live

Follow the below steps to go live:

1. Install the managed packaged in Production Org.
2. Create a new Payment Gateway Provider record in your Production Org by following steps in Step 1.
3. Create a new named credential - "**Payment_LIVE**" in your Production Org by following steps in Step 2.
4. Create a new Payment Gateway record in your Production Org by following steps in Step 3.
5. Create a new Payment Configuration custom setting record in your Production org by following steps in Step 6 If you support multi-site configuration for different Merchant ID, then create separate records for each Merchant ID and each sales channel. **Make sure the Endpoint field is selected PRODUCTION.**

6. Upgrade Package

Follow the standard Salesforce process to upgrade the "**Cybersource for Lightning Order Management**" package. Please refer to this link for more details.

7. Troubleshooting

- If the store name is not visible in the Set Payment Configuration screen while attempting to update, the reason could be that only the user who created the store has visibility or access to it.