

User Guide

— v3.2.2 —



OSF Unify
COMMERCE
Act Smart / Think Customer

DATA Integration Order on Behalf Case

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Overview

The purpose of this document is to provide guidance and workflows for the Salesforce Commerce Cloud to Salesforce Order on Behalf integration. This integration is targeting the sales representatives and customer service personnel to create and manage orders on behalf of customers directly from Salesforce.

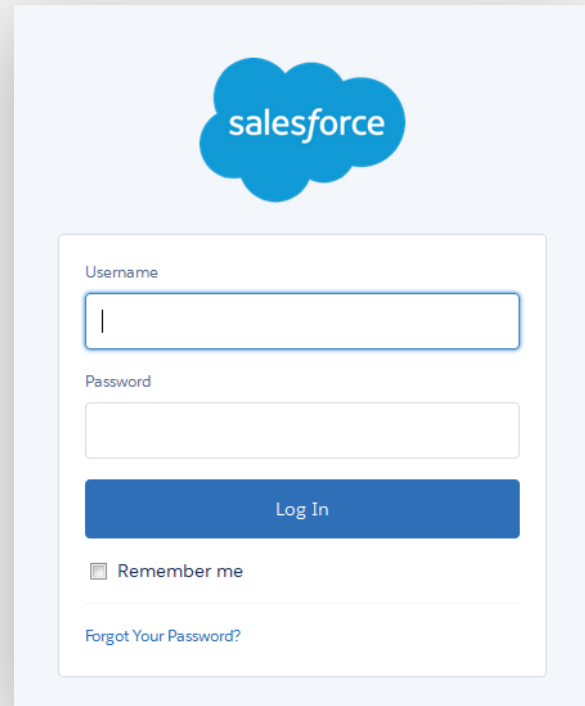
The Salesforce Commerce Cloud customer service – order on behalf integration into Salesforce will provide the following functionality:

- Search for a customer
- Create a new order on behalf of a customer
- Search for orders

CsSuite Support Flow - Case

1. The Support Agent logs into the Salesforce environment using his credentials:
2. The agent opens the **Cases** object, clicks the **New** button and opens a case associated to an account exported from Salesforce Commerce Cloud which has the Customer Number filled in:

Note: If you have record type set up in Salesforce for Cases, you may be prompted to select the appropriate case record type, in this example we will select “Interaction” and click on continue.

The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it are two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Underneath the button is a checkbox labeled 'Remember me'. At the bottom of the login area is a link that says 'Forgot Your Password?'.

salesforce

Username

Password

Log In

☐ Remember me

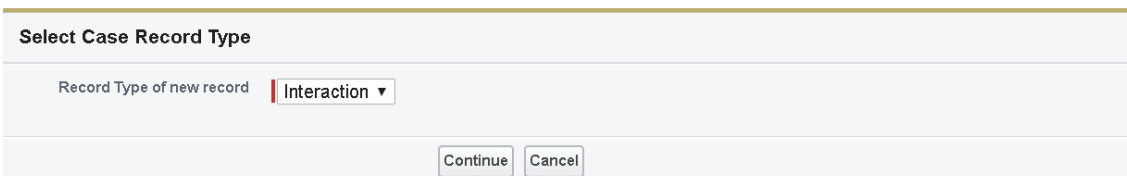
[Forgot Your Password?](#)



New Case

Select Case Record Type

Select a record type for the new case. To skip this page in the future, change your record type settings on your personal setup page.

The image shows a form titled 'Select Case Record Type'. It has a section 'Select Case Record Type' with a label 'Record Type of new record' and a dropdown menu showing 'Interaction'. At the bottom of the form are two buttons: 'Continue' and 'Cancel'.

Select Case Record Type

Record Type of new record | Interaction ▼

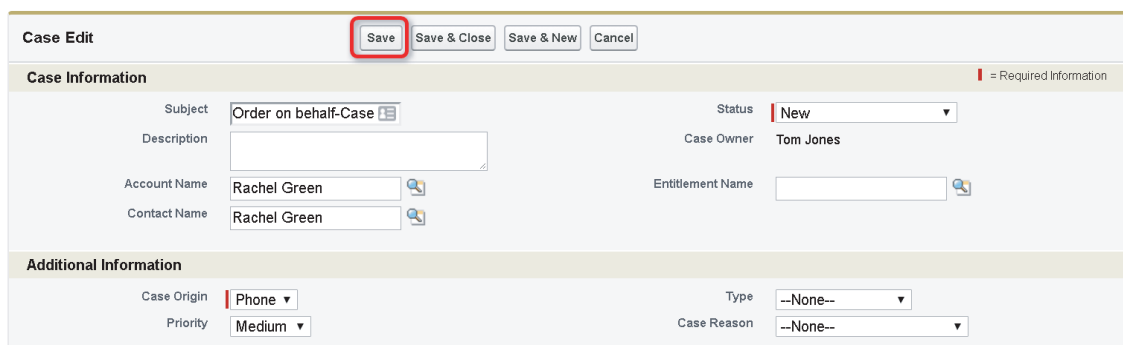
Continue Cancel

After this you will be redirected to the screen where you need to fill required fields to create a case, click on “Save” to save the changes to the case.



Case Edit

New Case

[Help for this Page](#)The image shows the 'New Case' form in Salesforce. At the top, there's a 'Case Edit' header with buttons: 'Save' (highlighted with a red box), 'Save & Close', 'Save & New', and 'Cancel'. Below this is the 'Case Information' section, which includes fields for 'Subject' (filled with 'Order on behalf-Case'), 'Description', 'Account Name' (filled with 'Rachel Green'), and 'Contact Name' (filled with 'Rachel Green'). To the right, there are fields for 'Status' (dropdown with 'New' selected), 'Case Owner' (filled with 'Tom Jones'), and 'Entitlement Name'. Below the 'Case Information' section is the 'Additional Information' section, which includes 'Case Origin' (dropdown with 'Phone' selected), 'Priority' (dropdown with 'Medium' selected), 'Type' (dropdown with '--None--' selected), and 'Case Reason' (dropdown with '--None--' selected). A legend on the right indicates that a red bar in the field label means it is required information.

Case Edit

Save Save & Close Save & New Cancel

Case Information

Subject | Order on behalf-Case

Description

Account Name | Rachel Green

Contact Name | Rachel Green

Status | New

Case Owner | Tom Jones

Entitlement Name

Additional Information

Case Origin | Phone

Priority | Medium

Type | --None--

Case Reason | --None--

= Required Information

3. Once case is saved you need to click on “Details” tab in order to see Case details and available related lists.

Note: This screen is visible only when you have “Case feed layout” enabled, if you are using standard case page layout you can skip this step.

Customer: Rachel Green, Rachel Green, (877) 614-5568

Case Number: 00001122, Created Date: 6/26/2017 11:13 AM

Status: New, Priority: Medium, Case Owner: Tom Jones

Order on behalf-Case

No Description

Feed: Details

Post, Email, Reopen Case, Change Status, New Task

Click here to expand the Post action.

All Updates for this case

Sort By: Latest Posts

Tom Jones created this case.

00001122

Subject: Order on behalf-Case

Priority: Medium

Status: New

Followers: No followers.

Topics: Add Topics

Manage Commerce Cloud Orders

4. Scroll down the page to navigate to “Case Product” related list and click on **New Case Product** button

Feed, Details

Case Detail

Edit, Delete, Close Case, Clone, Sharing, Manage Commerce Cloud Orders, Accept Case

Case Information

Subject: Order on behalf-Case, Case Number: 00001122, Status: New

Description: Rachel Green, Account Name: Rachel Green, Contact Name: Rachel Green, Case Flag: [Flag]

Contact Phone: (877) 614-5568, Contact Email: rachel.green@osf-global.com, Case Owner: Tom Jones [Change], Entitlement Name: Immediate Support

Additional Information

Case Origin: Phone, Type: [Type], Priority: Medium, Case Reason: [Reason]

Description Information

Current basket, Last visited products

Web Information

Date/Time Opened: 6/26/2017 11:13 AM, Date/Time Closed: [Date/Time]

Edit, Delete, Close Case, Clone, Sharing, Manage Commerce Cloud Orders, Accept Case

Case Products

New Case Product

Case Products Help

No records to display

5. Add product(s) to the case:

Case Product Edit

New Case Product

Case Product Edit

Save Save & New Cancel

Information

Case Product Name OOB-DemoTest

Case 00001122

Product Tennis Racquet-Elite

Quantity 1

Owner Tom Jones

Save Save & New Cancel

6. After saving the added case product the agent will click the Case ID to go back to the case page:

Case Product

OOB-DemoTest

« Back to List: Accounts

Customize Page | Edit Layout | Printable View | Help for this Page

Open Activities (0) | Activity History (0)

Case Product Detail

Edit Delete Clone Submit for Approval

Case Product Name OOB-DemoTest

Case 00001122

Product Tennis Racquet-Elite

Commerce Cloud Product Code Sportful_112345805

Quantity 1

Created By Tom Jones, 6/26/2017 11:20 AM

Last Modified By Tom Jones, 6/26/2017 11:20 AM

Edit Delete Clone Submit for Approval

Open Activities

New Task New Event

No records to display

Activity History

Log a Call Mail Merge Send an Email

No records to display

7. Once the needed Case Products were added to the Case the Support Agent clicks the **Manage Commerce Cloud Orders** button:

The screenshot shows the 'Case Detail' page for a case titled 'Order on behalf-Case'. The page is divided into several sections: Case Information, Additional Information, Description Information, and Web Information. The 'Manage Commerce Cloud Orders' button is highlighted with a red box and a red arrow pointing to it from the 'Additional Information' section.

Case Information	
Subject	Order on behalf-Case
Description	
Account Name	Rachel Green
Contact Name	Rachel Green
Case Flag	
Case Number	00001122
Status	New
Contact Phone	(877) 614-5568
Contact Email	rachel.green@osf-global.com
Case Owner	Tom Jones [Change]
Entitlement Name	Immediate Support

Additional Information	
Case Origin	Phone
Priority	Medium
Type	
Case Reason	

Description Information	
Current basket	
Last visited products	

Web Information	
Date/Time Opened	6/26/2017 11:13 AM
Date/Time Closed	

Note: The **Manage Commerce Cloud Orders** button may need to be added manually on the Case layout after the Salesforce package is installed.

8. On click to **Manage Commerce Cloud Orders**, an iFrame will be displayed with the following information:

a. CsSuite Login form

Salesforce Commerce Cloud credentials will be requested for the first time when the CsSuite functionality will be used **and** each time when the login expires (expiration time is set to 8h);

The screenshot shows the CsSuite Login form. The form is titled 'salesforce commerce cloud Customer Service Suite'. It includes a login field, a password field, and a 'Ligon' button. The form is displayed in an iFrame.

Note: The agent will be successfully logged in to the CsSuite page only if the username used in the above screen matches exactly the username already configured in SF per user level.

b. CsSuite page

When the CsSuite functionality was previously used and the session is not yet expired (please see the next step);

9. If the Salesforce Commerce Cloud Customer Number existed on the Person Account and was correct, the registered account is automatically searched, selected, and the Order on Behalf with the Case Products (already added to the case in Salesforce) is automatically displayed:

The screenshot displays the Salesforce Commerce Cloud CsSuite interface. The left sidebar contains navigation tabs for 'ORDERS' and 'PRODUCTS', with 'HOME | Back to Search Results' below. The main content area is divided into sections: 'Order Information', 'Billing Address', and 'Payment Information'. The 'Order Information' section shows 'Order contains: 1 line items to 1 shipping location(s)', 'Total Price: USD 39.89', 'Date received: New order to be created.', 'Customer: Rachel Green', 'Customer No: 00009501', and 'Email: rachel.green@osf-global.com'. The 'Billing Address' section shows 'Rachel Green', '591 Redwood Ave', 'Sacramento, CA 95815', 'us', and '(877) 614-5568'. The 'Payment Information' section has a 'New Payment' button. The right side of the interface shows the 'Customer: Order:' section with 'Status: New'. Below this is the 'Shipment: Rachel Green; 1 Item; USD 32.00 (Default)' section, which includes 'Shipping Status: NOTSHIPPED', 'Gift: false', 'Gift Message: (no gift message entered)', and 'Ship to: Rachel Green, 591 Redwood Ave, Sacramento, CA 95815, us, (877) 614-5568'. A table below the shipment section lists the product 'Tennis Racquet-Elite' with a price of \$32.00, quantity of 1, and item total of \$32.00. The table also shows 'Shipping Total: \$5.99' and 'Tax Total: \$1.90'.

Product	Price & Discounts	Qty.	Item Total
Tennis Racquet-Elite Sportful_112345805 In Stock	\$32.00	1	\$32.00
Shipping Total:			\$5.99
Tax Total:			\$1.90

10. If the Person Account to which the case is related had the Shipping and Billing address fields filled in when the **Manage Commerce Cloud Orders** button was clicked, and the account has no address associated with it on the Salesforce Commerce Cloud storefront, the Shipping and Billing addresses from the CsSuite will be automatically filled in with the values from the Shipping and Billing addresses found on the Person Account in Salesforce. If this is not the case, the support agent will need to fill the Shipping, Billing and Payment Information and place the order.

Fill the Payment Information by selecting the New Payment option:

The screenshot shows the Salesforce Commerce Cloud Suite interface. On the left, the 'Payment Information' section has a 'New Payment' button highlighted with a red rectangle. The main area displays order details for 'Rachel Green' with a total price of USD 39.89. The 'Product' table lists 'Tennis Racquet-Elite' for \$32.00. The 'Shipping' section shows 'NOTSHIPPED' status and shipping address details. The 'Status' is 'New'.

Product	Price & Discounts	Qty.	Item Total
Tennis Racquet-Elite Sportful_112345805 In Stock	\$32.00	1	\$32.00
Shipping Total:			\$5.99
Tax Total:			\$1.90

the Add Payment modal will open and the agent should fill the Credit Card information; after adding all the payment info, the agent will press the Apply button:

Note: If the added information is not valid, when the **Apply** button is clicked, appropriate error messages will be displayed:

This screenshot shows the 'Add Payment' modal open over the same order details. The modal contains fields for 'Credit Card' type (set to Visa), card number, expiration date (January/Year), name on card, and security code. A red arrow points from the 'New Payment' button in the previous screenshot to this modal. The 'Apply' button is at the bottom of the modal.

ORDER **PRODUCTS**

HOME | Back to Search Results

Order Information

Order contains: 1 line items to 1 shipping location(s).
 Total Price: USD 39.89
 Date received: New order to be created.
 Customer: Rachel Green
 Customer No: 00009501
 Email: rachel.green@osf-global.com

Billing Address

Rachel Green
 591 Redwood Ave
 Sacramento, CA 95815
 US
 (877) 614-5568

Payment Information

New Payment

Add Payment

Credit Card

Type: Visa
 Number:
 Invalid expiration date: January Year
 Name on Card:
 Security Code:
 Please check again your credit card number.
 Invalid expiration date
 Please enter your Name as it appears on the card
 Please enter your Security Code

Apply Cancel

Status: New

Price & Discounts	Qty.	Item Total
\$32.00	1 +/-	\$32.00

11. Once the Payment Information step is completed the agent can check and update the Billing / Shipping information as needed:

ORDER **PRODUCTS**

HOME | Back to Search Results

Customer Attributes

Customer No: 00009501
 First Name:
 Last Name:
 Email:
 Maximum Results: 50

Order

Customer: Rachel Green Order:
 Shipment: Rachel Green; 1 Item; USD 32.00 (Default)
 Shipping Status: NOTSHIPPED

Ship to:

Rachel Green
 591 Redwood Ave
 Sacramento, CA 95815
 US
 (877) 614-5568

Price & Discounts

Price & Discounts	Qty.	Item Total
\$32.00	1 +/-	\$32.00

Shipping Total: \$5.99
 Tax Total: \$1.90
 Shipment Total: \$39.89

Shipping Address

First Name: Rachel
 Last Name: Green
 Address Line 1: 591 Redwood Ave
 Address Line 2:
 City: Sacramento
 Country: United States
 State: California
 Zip Code: 95815

Shipping Method

Method: Ground - \$5.99
 Description: Order received within 7-10 business days

Save Cancel

ORDER **PRODUCTS**

HOME | Back to Search Results

Order Information

Order contains: 1 line items to 1 shipping location(s).
 Total Price: USD 39.89
 Date received: New order to be created.
 Customer: Rachel Green
 Customer No: 00009501
 Email: rachel.green@osf-global.com

Billing Address

Rachel Green
 591 Redwood Ave
 Sacramento, CA 95815
 US
 (877) 614-5568

Payment Information

Credit Card #1

Edit Billing Address

Please update the details below.

First Name: Rachel
 Last Name: Green
 Address Line 1: 591 Redwood Ave
 Address Line 2:
 City: Sacramento
 Zip Code: 95815
 Country: United States
 State: Select one...
 Phone: (877) 614-5568
 Email: rachel.green@osf-global

Save Cancel

Status: Modified

Price & Discounts	Qty.	Item Total
\$32.00	1 +/-	\$32.00

Shipping Total: \$5.99
 Tax Total: \$1.90

- 12.** On the order page, if necessary, the agent can also apply a coupon code or upcharge/discount. When everything is done the agent can place the order by clicking the Save Order button;

The screenshot shows the Salesforce Commerce Cloud Suite interface. On the left, the 'Customer Attributes' section displays information for Rachel Green (ID: 00009501). The main area shows the 'Order' page for Rachel Green, with a status of 'Modified'. A modal dialog titled 'Confirm Order Submit for Order' is open, asking 'Are you sure you want to save all changes?' with 'Apply' and 'Cancel' buttons. The background shows a table of items (Tennis Racquet-Elite) and a summary of totals (Shipping Total: \$5.99, Tax Total: \$1.90, Shipment Total: \$39.89).

- 13.** After successfully saving the order, a pop up modal will be displayed containing the order number.

The screenshot shows the same Salesforce Commerce Cloud Suite interface as before, but now a modal dialog titled 'Order Saved' is displayed. The message inside the modal says 'New order saved successfully with order number 00007102.' and includes a 'Close' button. The background shows the same order details and summary.

Support Agent – Case Products

Things to be taken into consideration regarding the Salesforce Case Products to CsSuite implementation:

1. The Case Products will be copied only through the Order on Behalf functionality which keeps the Support User inside the CsSuite. **Clicking Access Storefront on Behalf** while the Case Products are sent as parameters will not result in the cart population on the storefront;
2. When the user clicks the **Manage Commerce Cloud Orders** button from the Cases object, while the Case has Case Products, for an unregistered user or a user which does not have the Salesforce Commerce Cloud Customer Number filled in, the CsSuite will remain in the Customers tab until the user selects **Order for Unregistered User**;
Once the **Order for Unregistered User** button is clicked, the Case Products will be added to the basket inside the CsSuite and an unregistered order can be placed;
3. If the product is found in Salesforce and is added as a Case Product to a Case, but the product is not available on the Salesforce Commerce Cloud Storefront, when the **Manage Commerce Cloud Orders** button is clicked, the Order on Behalf process will be started inside the CsSuite, however, the products which are not available on the Commerce Cloud storefront will not be added to the basket inside the CsSuite (no warning message will be available for this scenario);
4. If the browser page is refreshed while the user is inside the CsSuite and has made changes on the products from the Order on Behalf, the changes will be lost as the basket for the Order on Behalf will contain again the Case Products related to the Case from Salesforce;
5. If the user adds, removes or updates products while in the CsSuite, returns to the Case in Salesforce and then clicks the **Manage Commerce Cloud Orders** button again, the basket inside the CsSuite will contain the Case Products related to the Case;
6. If the user logs out from the CsSuite in the Order on Behalf process, when logging back the products from the CsSuite basket will be removed. In order to automatically add the Case Products to the CsSuite basket, the user should return to the Case and click **Manage Commerce Cloud Orders** button again;
7. It is not recommended to use the Back and Forward buttons of the browser while navigating through the CsSuite, since it might lead to information being lost inside the CsSuite.

Order Flow

Once the order is placed using the CsSuite from Salesforce, it will be visible in Salesforce Commerce Cloud in the Business Manager. The orders placed by support agents can be identified based on the value of the Created By field since this field is populated based on who places the order in CsSuite.

In the image below can be observed that all the orders placed by support agents have the Created By value filled in with the support agent **loginName** from the Salesforce Commerce Cloud platform; the orders placed by the customers themselves will have the Created By value set to “Customer”.

Order Search								
Simple Advanced By Number								
Order Number: Find								
Number	Order Date	Site	Created By	Registration Status	Customer	Email	Total	Status
00007102	6/28/17 9:36:31 am Etc/UTC	Sportful	SportfulServiceRep	Registered	Rachel Green	rachel.green@osf-global.com	\$39.89	New
00007002	6/28/17 7:51:04 am Etc/UTC	Sportful	SportfulServiceRep	Registered	Rachel Green	rachel.green@osf-global.com	\$217.69	New
00006903	6/25/17 6:05:53 pm Etc/UTC	Sportful	automated test runner	Registered	AutomationTestsFN AutomationTestsLN	demo.automation.tests@osf-global.com	\$224.69	New
00006901	6/25/17 5:51:59 pm Etc/UTC	Sportful	Customer	Registered	AutomationTestsFN AutomationTestsLN	demo.automation.tests@osf-global.com	\$115.48	New

Using the “OSF UnifyCOMMERCE for Commerce Cloud” connector, the orders will be exported to Salesforce based on a scheduled time interval.

Technical/Security Considerations

Each Salesforce user that needs to have access to CSSuite, must have a Salesforce Commerce Cloud Business Manager user and have the permissions:

- Login_Agent **and**
- Login_On_Behalf

Administration > Organization > Roles > UserAgent - Functional Permissions

General Users Business Manager Modules **Functional Permissions**

UserAgent - Functional Permissions

The list shows all functional permissions available in the system. Use the drop down list to select either the organization or a site as context for functional permissions. Select the check boxes and use the Update button to grant permissions. Unselect the check boxes and use the Update button to remove permissions.

Select Context: SiteGenesis Apply

Permission	Description	
Login_On_Behalf	Allows administrators to login on behalf of a customer into storefront.	☐
Replication_Run_For_Site	Allows to manage and start data replication processes for site-specific replication groups (i.e. search indexes).	☐
Login_Agent	Allows to login as agent user to storefront. Restrict the access to only those Business Manager users that have permission Login_Agent.	☒
Manage_Site_Catalog	Allows to manage the catalog and its assets in the selected site.	☐
Manage_Site_Library	Allows to manage a library and its assets in the selected site.	☐
Manage_Site_PriceBooks	Allows to manage the price books assigned to the selected site.	☐
Manage_Site_Inventory	Allows to manage the site inventory list and its inventory records in the selected site.	☐
Adjust_Item_Price	Allows the addition/deletion of a price adjustment at the item level.	☐
Adjust_Shipping_Price	Allows the addition/deletion of a price adjustment at the shipping level.	☐
Adjust_Order_Price	Allows the addition/deletion of a price adjustment at the order level.	☐
Delete_Order_Note	Allows the deletion of a note at the order or basket level.	☐
Create_Order_On_Behalf_Of	Allows to create an order as an agent via the shop API.	☐
Search_Orders	Allows to search for orders as an agent via the shop API.	☐
Handle_External_Orders	Allows to handle external orders as an agent via the shop API.	☐

<< Back to List Update



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