

User Guide

— v3.2.2 —



OSF Unify

COMMERCE

Act Smart / Think Customer

OSF UnifyCOMMERCE for Commerce Cloud

Table of Contents

- 1 Introduction
- 2 Integration Overview
- 3 Accounts Synchronization
- 4 Products Synchronization
- 5 Price Book Entries Synchronization
- 6 Orders Synchronization (with Order Products)
- 7 Wishlist Export
- 8 Removed Product Export
- 9 Abandoned Cart
- 10 Key Indicators Overview

Introduction

OSF UnifyCOMMERCE (“Patent Pending”) | DATA Integration is an integration plug-in that enables: accounts, products, price book entries, orders, order products, wishlists, wishlist products, removed product lists, removed products and abandoned cart data from the Salesforce Commerce Cloud platform to be automatically synchronized into Salesforce CRM. In order for the integration between the two platforms to work, the “int_osf_salesforce_api” and „int_osf_salesforce_connector” cartridges need to be installed and configured in the Salesforce Commerce Cloud environment.

Integration Overview

A scheduled job runs in the Salesforce Commerce Cloud environment with a configured frequency, and exports all the customers, products, orders, wishlists, removed product lists and abandoned carts created or updated since the last time the job ran. It is recommended for the scheduled job to run each hour, however, that may need to vary based on your company’s business needs and on the number of customers, products, orders, wishlists, removed product lists and abandoned carts created in the Salesforce Commerce Cloud environment over a set time period (an hour for example).

If the Salesforce Commerce Cloud environment from which the exports are performed has products that have prices in multiple currencies, and the products with prices in multiple currencies are needed in Salesforce CRM, the “Multiple Currencies” feature needs to be activated in the Salesforce CRM organization and the complementary settings should be performed during the configuration of the cartridge on the Salesforce Commerce Cloud environment. This will ensure that products with prices in multiple currencies are exported successfully from Salesforce Commerce Cloud to Salesforce CRM.

OSF UnifyCOMMERCE | DATA Integration will never create the same Person Account twice in Salesforce CRM when it is exported from the same Salesforce Commerce Cloud site. As an example, if the unregistered (guest) order feature is enabled on the Salesforce Commerce Cloud storefront, and a user which is already registered on the storefront places an unregistered order using the same email address he uses for the registered account, when the export job runs and the order is exported to Salesforce CRM, the order will be associated directly with the Person Account which already exists in Salesforce CRM as a result of the registered account created on the Salesforce Commerce Cloud storefront.

Another item to consider for this integration is the space taken up by the records exported from Salesforce Commerce Cloud to Salesforce CRM. Before starting to export records from Salesforce Commerce Cloud to Salesforce CRM, make sure that you are not close to the storage limit for your Salesforce CRM environment.

Accounts Synchronization

When the scheduled job runs, it will export both the accounts created and the accounts updated from Salesforce Commerce Cloud to Salesforce CRM. The accounts from Salesforce Commerce Cloud are exported to Salesforce CRM as Person Accounts. In order for the integration to work, the Person Accounts feature must be enabled on your Salesforce CRM organization prior to running the first export job.

The information of the account exported from Salesforce Commerce Cloud to Salesforce CRM may vary based on the configuration of the Salesforce Commerce Cloud cartridge and the fields exposed on the storefront. The standard information exported by the OSF UnifyCOMMERCE | DATA Integration can be found in the table and images below.

SFCC Field	SFDC Field	Notes
First Name	First Name	
Last Name	Last Name	
Email	Email	
Title	Salutation	Only if it exists and is also exposed on the storefront
Job Title	Title	Only if it exists and is also exposed on the storefront
Birthday	Birthdate	Only if it exists and is also exposed on the storefront
Business Phone	Other Phone	Only if it exists and is also exposed on the storefront
Mobile Phone	Mobile	Only if it exists and is also exposed on the storefront
Fax Number	Fax	Only if it exists and is also exposed on the storefront
Preferred Address - Phone	Phone	
Customer No	Commerce Cloud Customer Number	
N/A	Account Record Type	The Salesforce Id of the Person Account record type
N/A	Commerce Cloud Id	External Id generated by the cartridge to avoid creating duplicate records
N/A	Commerce Cloud Abandoned Cart	Based on the value of this field Abandoned Cart Opportunities are created
N/A	Customer Registration Status	If the customer is registered in Salesforce Commerce Cloud, the field will display "Registered"; if the account is created in Salesforce as a result of an unregistered order, it will display "Unregistered"
Address Information		
Preferred Address Address 1	Billing Street	Complex mapping: the values of the 2 address fields from Salesforce Commerce Cloud will be mapped into a single field in Salesforce CRM
Preferred Address Address 2		
Preferred Address City	Billing City	
Preferred Address Country	Billing Country	
Preferred Address State	Billing State/Province	
Preferred Address Postal Code	Billing Zip/Postal Code	
Created	Commerce Cloud creation date	The date at which the account was created in the Commerce Cloud
N/A	Commerce Cloud Site Id	The Commerce Cloud site from which the account was exported. In case of multiple sites the value may vary based on the number of sites and how the customer lists are assigned
N/A	Synced by UnifyCommerce	Always populated with the value TRUE for the products exported by OSF UnifyCOMMERCE DATA Integration

Table 3.1 – Account synchronization mappings

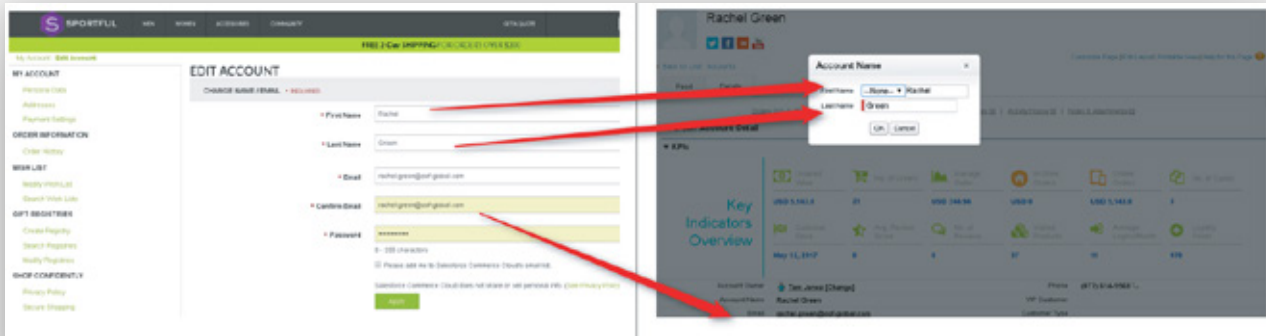


Image 3.1 – First Name, Last name and Email field mappings

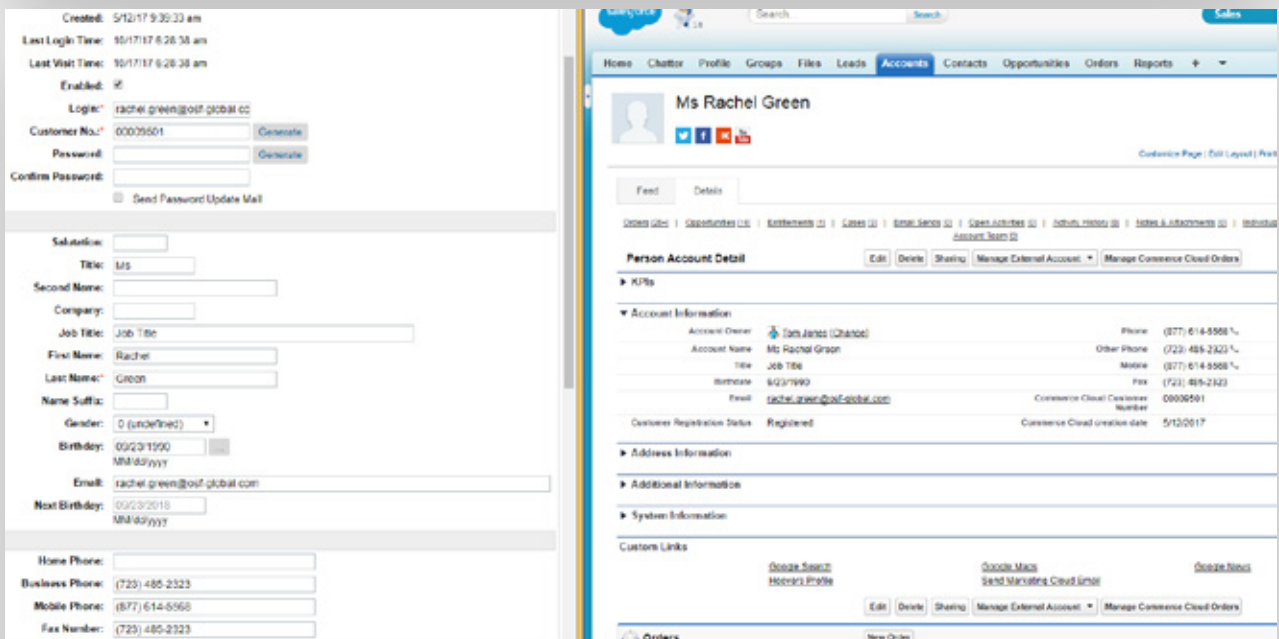


Image 3.2 – Title, Job Title, Birthday, Business Phone, Mobile Phone, Fax Number and Customer Registration Status mappings

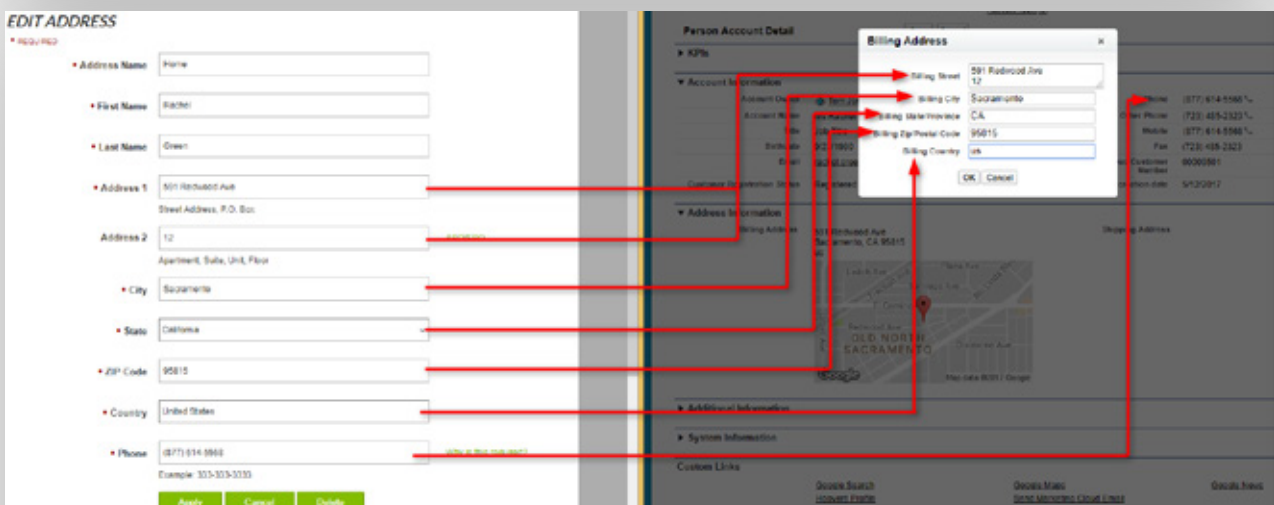


Image 3.3 – Address Mappings (including Phone), with the Address 1 and Address 2 fields being mapped into only one field in Salesforce: Billing Street. The Address 1 and Address 2 are separated by a new line in the Billing Street field.

Please note that only the Address marked as “Default Address” on the Salesforce Commerce Cloud account is exported to Salesforce CRM as the Billing Address of the Person Account.

OSF UnifyCOMMERCE | DATA Integration also supports the creation of unregistered customers as Person Accounts in Salesforce CRM, whenever an unregistered (guest) order is placed on the Salesforce Commerce Cloud storefront. The information used to create the Person Account as a result of the unregistered order is taken from the billing address of the unregistered order: First Name, Last Name, Address, Phone and Email address. The next time the unregistered user places an unregistered order using the same email address, the order will be related to the same Person Account, no additional account is created.

In order to avoid creating duplicate records, an External ID field is used on the Accounts object: Commerce Cloud ID (API Name: OSF_DWback__DW_ID__c).

Products Synchronization

When the scheduled job runs, it will also export both the products created and the products updated from Salesforce Commerce Cloud to Salesforce CRM. The products from Salesforce Commerce Cloud are exported in Salesforce CRM as records in the Products object.

The information of the product exported from Salesforce Commerce Cloud to Salesforce CRM may vary based on the configuration of the cartridge. The standard information exported by the OSF UnifyCOMMERCE | DATA Integration can be found in the table and images below.

SFCC Field	SFDC Field	Notes
ID	Product Code	
ID	Commerce Cloud ID	
Name	Product Name	
Description	Description	
Manufacturer	Manufacturer	
Brand	Brand	
Online	Active	
N/A	Synced by OSF UnifyCOMMERCE DATA Integration	Always sent as true for the products exported by OSF UnifyCOMMERCE DATA Integration
N/A	Commerce Cloud Master Code	The Product Code of the Master Product. Only exported for Variation Products
N/A	Product URL	In order for the value of this field to be correctly exported, configuration in the cartridge is necessary
N/A	Product Image URL	In order for the value of this field to be correctly exported, configuration in cartridge is necessary

Table 4.1 - Product Mappings

The left screenshot shows the 'Tennis Racquet-Elite' product details page. It includes a 'Select Language' dropdown set to 'Default'. Below this, there are several sections: 'ID' (Sportful_112345805), 'Catalog' (sportfulmaster-catalog), 'Tax Class' (Standard), 'Searchable' (Default), 'Searchable if Unavailable' (Default), 'Name' (Tennis Racquet-Elite), 'Brand' (Sportful_112345805), 'Manufacturer' (Sportful_112345805), and 'Product ID' (Sportful_112345805). The right screenshot shows the 'Product Detail' view for the same product. It includes fields for 'Product Name' (Tennis Racquet-Elite), 'Product Code' (Sportful_112345805), 'Commerce Cloud ID' (Sportful_112345805), 'Brand' (Sportful_112345805), and 'Description' (This cobalt blue racket features a dark blue-gray grip).

Image 4.1 – Product field mappings: Product Code, Commerce Cloud ID, Product Name, Brand, Short Description and Manufacturer.

The left screenshot shows the 'Online/Offline' section of the product management interface. It includes a 'Select Language' dropdown set to 'Default'. Below this, there are several sections: 'Online' (Default), 'Online From' (Default), 'Online To' (Default), and 'Time' (From a). The right screenshot shows the 'Product Detail' view for the same product. It includes fields for 'Product Name' (Tennis Racquet-Elite), 'Product Code' (Sportful_112345805), 'Commerce Cloud ID' (Sportful_112345805), 'Brand' (Sportful_112345805), and 'Description' (This cobalt blue racket features a dark blue-gray grip). A red arrow points from the 'Online' dropdown in the left screenshot to the 'Active' checkbox in the right screenshot.

Image 4.2 – Product field mappings: Online and Active

Product
Tennis Racquet-Elite

< Back to List: Accounts

Standard Price (1) | Price Books (0)

Product Detail

Product Name: Tennis Racquet-Elite
Product Code: Sportful_112345805
Brand: Sportful

Commerce Cloud ID: Sportful_112345805
Commerce Cloud Master Code: Sportful
Active: ☒

Description Information

Product Description: This cobalt blue racket features a dark blue-gray grip.
Synced by UnifyCommerce: ☒

Product URL: http://osfglobal11-alliance-prtr-eu06-dw.deman...
Product Image URL: http://osfglobal11-alliance-prtr-eu06-dw.deman...

Image 4.3 – Product field mappings: Salesforce Commerce Cloud Master Code, Synced by OSFUnifyCOMMERCE, Product Image URL, Product URL

In order to avoid creating duplicate records, an External ID field is used on the Products object: Commerce Cloud ID (API Name: OSF_DWback__DW_ID__c).

Price Book Entries Synchronization

When the scheduled job runs, it will also export both the price book entries created and the price book entries updated from Salesforce Commerce Cloud to Salesforce CRM. The price book entries from Salesforce Commerce Cloud are exported in Salesforce CRM as records in the Price Book Entry object.

The price book entries will always be exported in Salesforce CRM inside the price book which is marked as Standard and Active.

The information from the price book entry exported from Salesforce Commerce Cloud to Salesforce CRM may vary based on the configuration of the cartridge. The standard information exported by the OSF UnifyCOMMERCE | DATA Integration can be found in the table and images below.

SFCC Field	SFDC Field
PricelId	Commerce Cloud ID
ID(Product)	Product (Lookup)
Price	List Price
price.currencyCode	Currency Code
PriceBookId	PriceBook (Lookup)
PriceBookEntryActive	Active
N/A	Synced by OSF UnifyCOMMERCE DATA Integration

Table 5.1 - Price Book Entry Mappings

Please find below three important items regarding the export of the price book entries:

1. If in Salesforce Commerce Cloud there are multiple entries for the price of a product, and the entries have the same currency, the lowest of the prices will be exported to Salesforce CRM.
2. The ID of the product is exported from Salesforce Commerce Cloud to Salesforce CRM for the price book entries in order to set the price book entry as related to the product to which it belongs in Salesforce Commerce Cloud.
3. The ID of the price book entry is generated in Salesforce Commerce Cloud by the cartridge and is exported in the Salesforce field Commerce Cloud ID as: "pricebookID_productID_currency". The Commerce Cloud ID field (API Name: OSF_DWback__DW_ID__c) from the Price Book Entry object is used as an External ID in order to avoid creating duplicate records.

The image shows two side-by-side screenshots from the Salesforce Commerce Cloud interface. The left screenshot displays a 'Price Book' table with columns for 'Price Book', 'Valid Period', 'Price Table', 'Currency', and 'Active'. It lists two price books: 'Sportful-usd-ent-entries (Sportful-Ent-Prices)' and 'Sportful-usd-sub-entries (Sportful-Sub-Prices)'. The right screenshot shows the 'Price Book Entry Detail' form, which includes fields for 'Product', 'Terms, Discount, Site', 'Price Book', and 'Unit Price'. It also shows the 'Commerce Cloud ID' as 'sportful-pricebook_sportful_112345678_USD' and a checkmark indicating it is 'Synced by UnifyCommerce'.

Image 5.1 – Price Book Entry mappings

Orders Synchronization (with Order Products)

When the scheduled job runs, it will also export the Orders created, with the associated Order Products from Salesforce Commerce Cloud to Salesforce CRM. The Orders from Commerce Cloud are exported in Salesforce CRM as records in the Order object, and the Order Products as Order Items (Order Products).

The information of the Orders and Order Products exported from Salesforce Commerce Cloud to Salesforce CRM may vary based on the configuration of the cartridge. The standard information exported by the OSF UnifyCOMMERCE | DATA Integration can be found in the table and images below.

SFCC Field	SFDC Field	Notes
N/A	Order Name	The Order Name is generated in Salesforce Commerce Cloud and it contains the First Name and Last Name from the Billing Form plus the Order Number
N/A	Commerce Cloud Id	Generated in Salesforce Commerce Cloud, used to avoid duplicate records
Site Id	Commerce Cloud Site	The site from which the order was placed
N/A	Account Name (Lookup)	The Salesforce Account ID of the Account from which the order was placed is sent in this field
Status	Status	
Currency Code	Currency Code	
Creation Date	Order Start Date	
ShippingMethodName	Commerce Cloud Shipping Method	
N/A	Order Registration Status	Used to identify if the Order was placed by a "Registered" or "Unregistered" customer
N/A	Commerce Cloud Order No	Used to store the Commerce Cloud Order Number
N/A	Synced by OSF Unify COMMERCE DATA Integration	The value of this field will always be TRUE
N/A	PriceBook(Lookup)	In order to be able to export the Order Products for Orders, the Commerce Cloud ID of the Price Book which contains the prices for the products exported from Commerce Cloud needs to be sent in the export of the Order
Shipping Address Information		
Address 1	Shipping Street	Complex mapping: the values of the 2 address fields from Salesforce Commerce Cloud will be mapped into a single field in Salesforce CRM
Address 2		
City	Shipping City	
Postal Code	Shipping Zip/Postal Code	
Country	Shipping Country	
State	Shipping State	
Phone	Commerce Cloud Shipping Phone	

Billing Address Information		
Address 1	Billing Street	Complex mapping: the values of the 2 address fields from Salesforce Commerce Cloud will be mapped into a single field in Salesforce CRM
Address 2		
City	Billing City	
Postal Code	Billing Zip/Postal Code	
Country	Billing Country	
State	Billing State	
Phone	Commerce Cloud Billing Phone	

Table 6.1 - Order Mappings

SFCC Field	SFDC Field	Notes
N/A	Commerce Cloud Id	Generated in Commerce Cloud, used to avoid duplicate records
N/A	Order (Lookup)	The External ID generated for the order and used to associate the order product to the correct order
N/A	PriceBookEntry(Lookup)	The External ID generated for the price book entry and used to associate the order product to the correct price book entry
unitPrice	Unit Price	
Quantity	Quantity	
Discount	Commerce Cloud Discount	
description	Line Description	When the Order Item is an Extended Warranty product, the name of the product to which the Extended Warranty belongs is exported into this field. When the Order Item is part of a promotion, the name of the promotion is also exported into this field
N/A	Commerce Cloud Coupon Code	The Coupon Code is exported in this field if the order has at least one Coupon Code. This field is populated only for the "Coupon" support Product
N/A	Commerce Cloud Campaign Name	If the product is part of a promotion, the name of the campaign related to the promotion, is exported in this field
N/A	Commerce Cloud Size	The size of the variation product is exported in this field (if available)
N/A	Commerce Cloud Bonus Product	Bonus Products from Commerce Cloud Orders will have this field flagged as TRUE

Table 6.2 – Order Product Mappings

The screenshot shows the 'Order' and 'Order Products' sections of a Salesforce Commerce Cloud interface. Red arrows indicate the following mappings:

- Order Information:** Order Number (00000235), Order Name (Sports Jazz Shoes), Commerce Cloud Order No. (00000235), Account Name (Sports Jazz Shoes), and Order Type (New).
- Order Products:** Product ID (Sportful_60828247), Name (Sports Jazz Shoes), Manufacturer (Sports Jazz Shoes), Tax Rate (5.00 %), Unit Sales Price (\$135.33), Tax Basis (\$135.33), and Item Total (\$135.33).
- Adjustment:** Adjustment UnifyCommerce Product Discount (-\$27.07).
- Shipping:** Shipping Total (\$15.99), Tax Total (\$15.99), and Total (\$227.56).
- Order Product Details:** Product Code (Sportful_60828247), Quantity (1.00), Unit Price (\$135.33), Commerce Cloud Discount (20.00 %), Commerce Cloud Service Product (Sports Jazz Shoes), Commerce Cloud Box (Sports Jazz Shoes), Commerce Cloud Campaign Name (Demo Campaign), and Total Price (\$135.33).
- Order Product Description:** Line Description (Adjustment UnifyCommerce Product Discount).

Image 6.1 – Order and Order Product mappings

There are two items that need to be taken into consideration regarding the export of Orders and Order Products:

1. There is no standard support for discounts on the Order object in Salesforce CRM, as a result custom fields were created on the Order Product(Commerce Cloud Discount) and Order (Total Order Amount) objects to support the export of discounts from Salesforce Commerce Cloud to Salesforce CRM. The value discounted from a product which is part of a product promotion on the Commerce Cloud storefront is exported in the Commerce Cloud Discount field on the Order Product, and is always a percentage. The value of the Total Order Amount field from the Order object in Salesforce CRM will always be equal with the value of the field Price Order Total from the Commerce Cloud.

The screenshot shows the 'Order Product Detail' view in Salesforce CRM. Red arrows indicate the following mappings:

- Order Product Detail:** Order (00000235), Product (Sports Jazz Shoes), Product Code (Sportful_60828247), List Price (\$135.33), Unit Price (\$135.33), Quantity (1.00), Created By (Tom Jones, 6/26/2017 2:55 PM), and Line Description (Adjustment UnifyCommerce Product Discount).
- Order Product Summary:** Total Price (\$135.33) and Commerce Cloud Discount (20.00%).
- Order Product Description:** Line Description (Adjustment UnifyCommerce Product Discount).

Image 6.2 – Product discount as displayed in Commerce Cloud and in Salesforce CRM after the Order and Order Products are exported

2. OSF UnifyCOMMERCE | DATA Integration uses 5 “helper” products:

- a. Tax Total** – The order products exported from Commerce Cloud do not have tax included in their prices when they are exported to Salesforce CRM; as a result, a complementary product is exported with each order. The order product Tax Total has its Total Price equal with the sum of all the taxes for all products exported on each order.

Adjustment UnifyCommerce Order Discount:		-\$7.40	
Adjustment UnifyCommerce Service Promotion:		-\$8.75	
Shipping Total:		\$15.99	
Tax Total:		\$10.86	
Total:		\$227.96	

Product	Product Code	Quantity	Unit Price	Commerce Cloud Discount	Commerce Cloud Bonus Product	Commerce Cloud Size	Commerce Cloud Campaign Name	Line Description	Total Price
Sports Jazz Shoes	Sportful_60828247	1.00	\$135.33	20.00	☐		Demo Campaign	Adjustment UnifyCommerce Product Discount	\$108.26
Tennis Racquet- Victory	Sportful_262204133	1.00	\$74.00	0.00	☐				\$74.00
Winner S150	Sportful_35821117	1.00	\$35.00	0.00	☐				\$35.00
Shipping Total	Shipping_DW2SFDC	1.00	\$15.99	0.00	☐				\$15.99
Tax Total	Tax_DW2SFDC	1.00	\$10.86	0.00	☐				\$10.86
Order-level discount	Discount_DW2SFDC	1.00	(\$16.15)	0.00	☐		Demo Campaign	Adjustment UnifyCommerce Order Discount/Adjustment UnifyCommerce Service Promotion	(\$16.15)
Coupon	Coupon_DW2SFDC	1.00	\$0.00	0.00	☐		Demo Campaign		\$0.00

Image 6.3 – Tax Total as displayed in Commerce Cloud and in Salesforce CRM after the Order and Order Products are exported

- b. Shipping Total** – This product is exported for each order and in Salesforce CRM the Total Price of this order product is equal with the value of the shipping cost of the Commerce Cloud order.

Image 6.4 – Shipping Total as displayed in Commerce Cloud and in Salesforce CRM after the Order and Order Products are exported

- | | |
|---|----------|
| Adjustment UnifyCommerce Order Discount: | -\$7.40 |
| Adjustment UnifyCommerce Service Promotion: | -\$8.75 |
| Shipping Total: | \$15.99 |
| Tax Total: | \$10.86 |
| Total: | \$227.96 |

Image 6.5 – Discount Total as displayed in Commerce Cloud and in Salesforce after the Order on Order Products are exported

- d. Gift Certificate** – When the user orders a gift certificate, the value of that gift certificate will be exported in Salesforce CRM as an order product.

Product ID	Name	Manufacturer	Tax Rate	Unit Sales Price	Tax Basis	Item Total
****0001	Gift Certificate				\$1,500.00	\$1,500.00
Shipment Shipping Cost:						\$0.00
Total Shipping Cost (001):						\$0.00
Shipping Total:						\$0.00
Tax Total:						\$0.00
Total:						\$1,500.00

Order Detail

Order Owner

Tom Jones (Change)

Order Name

George Manolache_00007202

Commerce Cloud Order No

00007202

Account Name

George Manolache

Total Order Amount

\$1,500.00

Order Start Date

6/26/2017

Status

New

Commerce Cloud Shipping Method

Delivery Via Email

Address Information

Additional Information

System Information

Order Products (Standard Price Book)

Add Product

Edit All

Order Products (Standard Price Book) Help

Action	Product	Product Code	Quantity	Unit Price	Commerce Cloud Discount	Commerce Cloud Bonus Product	Commerce Cloud Size	Commerce Cloud Campaign Name	Line Description	Total Price
Edit Del	Shipping Total	Shipping_DW2SFDC	1.00	\$0.00	0.00	☐				\$0.00
Edit Del	Tax Total	Tax_DW2SFDC	1.00	\$0.00	0.00	☐				\$0.00
Edit Del	Gift Total	Gift_DW2SFDC	1.00	\$1,500.00	0.00	☐				\$1,500.00

Image 6.6 – Gift Total as displayed in Commerce Cloud and in Salesforce CRM after the Order and Order Products are exported

- e. Coupon** – When a user applies a coupon code to an order, an additional order product with the name „Coupon” will be exported and associated with the order. The Total Price of this order product will always be 0, however, the coupon code used will be exported in the field „Commerce Cloud Coupon Code”

Product ID	Name	Manufacturer	Tax Rate	Unit Sales Price	Tax Basis	Item Total
Sportful_60828247	Sports Jazz Shoes Adjustment UnifyCommerce Product Discount		5.00 %	\$135.33	\$135.33	\$135.33 -\$27.07
Sportful_262204133	Tennis Racquet-Victory		5.00 %	\$74.00	\$74.00	\$74.00
Sportful_185621117	Winner S150		5.00 %	\$35.00	\$35.00	\$35.00
Shipment Shipping Cost:						\$15.99
Total Shipping Cost (002):						\$15.99
Coupon Service25						
Adjustment UnifyCommerce Order Discount:						-\$7.40
Adjustment UnifyCommerce Service Promotion:						-\$8.75
Shipping Total:						\$15.99
Tax Total:						\$10.86
Total:						\$227.96

Order Products (Standard Price Book)									
Action	Product	Product Code	Quantity	Unit Price	Commerce Cloud Discount	Commerce Cloud Bonus Product	Commerce Cloud Size	Commerce Cloud Campaign Name	Line Description
Edit Del	Sports Jazz Shoes	Sportful_60828247	1.00	\$135.33	0.00	☐		Demo Campaign	Adjustment UnifyCommerce Product Discount
Edit Del	Tennis Racquet-Victory	Sportful_262204133	1.00	\$74.00	0.00	☐			
Edit Del	Winner S150	Sportful_185621117	1.00	\$35.00	0.00	☐			
Edit Del	Shipping Total	Shipping_DW2SFDC	1.00	\$15.99	0.00	☐			
Edit Del	Tax Total	Tax_DW2SFDC	1.00	\$10.86	0.00	☐			
Edit Del	Order-level discount	Discount_DW2SFDC	1.00	(\$16.15)	0.00	☐		Demo Campaign	Adjustment UnifyCommerce Order Discount(Adjustment UnifyCommerce Service Promotion
Edit Del	Coupon	Coupon_DW2SFDC	1.00	\$0.00	0.00	☐		Demo Campaign	

Product ID	Name	Manufacturer	Tax Rate	Unit Sales Price	Tax Basis	Item Total
Sportful_60828247	Sports Jazz Shoes Adjustment UnifyCommerce Product Discount		5.00 %	\$135.33	\$135.33	\$135.33 -\$27.07
Sportful_262204133	Tennis Racquet-Victory		5.00 %	\$74.00	\$74.00	\$74.00
Sportful_185621117	Winner S150		5.00 %	\$35.00	\$35.00	\$35.00
Shipment Shipping Cost:						\$15.99
Total Shipping Cost (002):						\$15.99
Coupon Service25						
Adjustment UnifyCommerce Order Discount:						-\$7.40
Adjustment UnifyCommerce Service Promotion:						-\$8.75
Shipping Total:						\$15.99
Tax Total:						\$10.86
Total:						\$227.96

Order Product Detail		Edit Delete	
Order	00000235	Total Price	\$0.00
Product	Coupon	Commerce Cloud Discount	0.00%
Product Code	Coupon_DW2SFDC	Commerce Cloud Coupon Code	Service25
List Price	\$0.00	Commerce Cloud Campaign Name	Demo Campaign
Unit Price	\$0.00		
Quantity	1.00		
Created By	Tom Jones, 6/26/2017 2:55 PM	Last Modified By	Tom Jones, 6/26/2017 2:55 PM
Line Description			

Image 6.7 – Coupon as displayed in Commerce Cloud and in Salesforce CRM after the Order on Order Products are exported

All orders placed on the Commerce Cloud storefront will always be related in Salesforce CRM to the account exported by the OSF UnifyCOMMERCE | DATA Integration, from which the order was placed. When a Salesforce user opens a Person Account exported by the OSF UnifyCOMMERCE | DATA Integration and scrolls down to the Orders related list, he will notice that all the orders placed by this customer in the Commerce Cloud can be found linked to his account.

The screenshot displays the Salesforce interface for a Person Account named Rachel Green. The top navigation bar includes links for Show Feed, Click to add topics, and Back to List: Custom Settings. The main content area is divided into several sections:

- Person Account Detail:** Includes buttons for Edit, Delete, Manage External Account, and Manage eCommerce Orders.
- KPI (Key Indicators Overview):** A dashboard showing various metrics:
 - Ordered Value: USD 1,028.48
 - No. of Orders: 7
 - Average Order: USD 146.93
 - In-Store Orders: USD 450.81
 - Online Orders: USD 577.67
 - No. of Cases: 1
 - Customer Since: September 06, 2017
 - Avg. Review Score: 0
 - No. of Reviews: 0
 - Loyalty Points: 970
- Account Information:** Details about the account owner (Alexander Liam), name (Rachel Green), birthdate, email (rachel.green@osf-global.com), title, automation created date (3/7/2017 5:19 AM), home phone, mobile, other phone, fax, and commerce cloud site id (sportful).
- Address Information:** A section for address details.
- Additional Information:** Includes commerce cloud customer number (00001515), commerce cloud id, customer registration status (Registered), and sync status (Synced by Unify Commerce).
- System Information:** A section for system details.
- Orders:** A table listing orders related to the account. The table has columns for Action, Order Number, Order Name, Synced by UnifyCommerce, Commerce Cloud Order No., Status, Order Start Date, and Total Order Amount. The table shows five orders, all of which are synced by UnifyCommerce.

Action	Order Number	Order Name	Synced by UnifyCommerce	Commerce Cloud Order No.	Status	Order Start Date	Total Order Amount
Edit Del	00001467	Rachel Green_00000101	✓	00000101	New	9/11/2017	\$450.81
Edit Del	00002325	Rachel Green_00001804	✓	00001804	New	9/28/2017	\$102.89
Edit Del	00002326	Rachel Green_00001806	✓	00001806	Replaced	9/28/2017	\$102.89
Edit Del	00002495	Rachel Green_00002101	✓	00002101	New	10/4/2017	\$125.87
Edit Del	00002642	Rachel Green_00002713	✓	00002713	Failed	10/12/2017	\$138.49

Image 6.8 – Person Account with all the orders exported from Commerce Cloud visible as Orders in the Orders related list

Wishlist Export

Wishlists on Salesforce Commerce Cloud

The products which are added to the customer Wishlist on the Commerce Cloud Storefront are the products customer intends to buy, but has not bought as of now. These could be used by the Merchant to drive product specific campaigns. The Wishlist from Salesforce Commerce Cloud is exported as an Opportunity with the associated Opportunity Products in Salesforce.

SFCC Field	Salesforce Field	Notes
N/A	Opportunity Name	The Name of the Opportunity in Salesforce is: "Wishlist_Commerce Cloud"
Salesforce account ID	Account Name (Lookup)	Used to associate the Wishlist opportunity with the correct account in Salesforce
N/A	Stage	A new value will be added to the Stage field: WISHLIST which will be used to identify Commerce Cloud Wishlists synced as Opportunities. The Salesforce Commerce Cloud Wishlists will be pushed with stage: WISHLIST
N/A	Commerce Cloud ID	Wishlist unique identifier generated by the Salesforce Commerce Cloud cartridge
N/A	Close Date	The date at which the Wishlist was last modified
Public	Is Public Wishlist?	If the Wishlist is marked as Public on the Salesforce Commerce Cloud storefront, the value of this field will be set to TRUE
N/A	Is Wishlist?	Used to identify Wishlists
Site Id	Commerce Cloud Site	The site from which the Wishlist was exported
N/A	Synced by OSF UnifyCOMMERCE DATA Integration	Sent as TRUE for the Wishlist exported from Salesforce Commerce Cloud

Table 7.1 – Wishlist (opportunity) Mappings

SFCC Field	SFDC Field	Notes
N/A	Opportunity (Lookup)	The Commerce Cloud ID generated for the Wishlist by the cartridge is exported in this field in order to link the Opportunity Item with the correct Opportunity
N/A	PriceBookEntry (Lookup)	The Commerce Cloud ID generated for the Price Book Entry is exported in this field in order to link the Opportunity Item with the correct Price Book Entry
Unit Sales Price	Sales Price	
Quantity	Quantity	
N/A	Commerce Cloud ID	Wishlist Product unique identifier generated by the Salesforce Commerce Cloud cartridge
Creation Date	Wishlist Added Date	The date+time at which the product was added to the Wishlist
Priority	Wishlist Product Priority	Field also contains Help Text to explain how the integer values are matched to the values from the Commerce Cloud storefront for the Priority picklist (standard SiteGenesis)
N/A	Removed from Wishlist	When a product is removed from Wishlist this flag is sent to Salesforce as TRUE for that product
N/A	Removed from Wishlist Date	The date and time at which the product was removed from the Wishlist
Size	Size	The size of the variation product is exported in this field (if available)

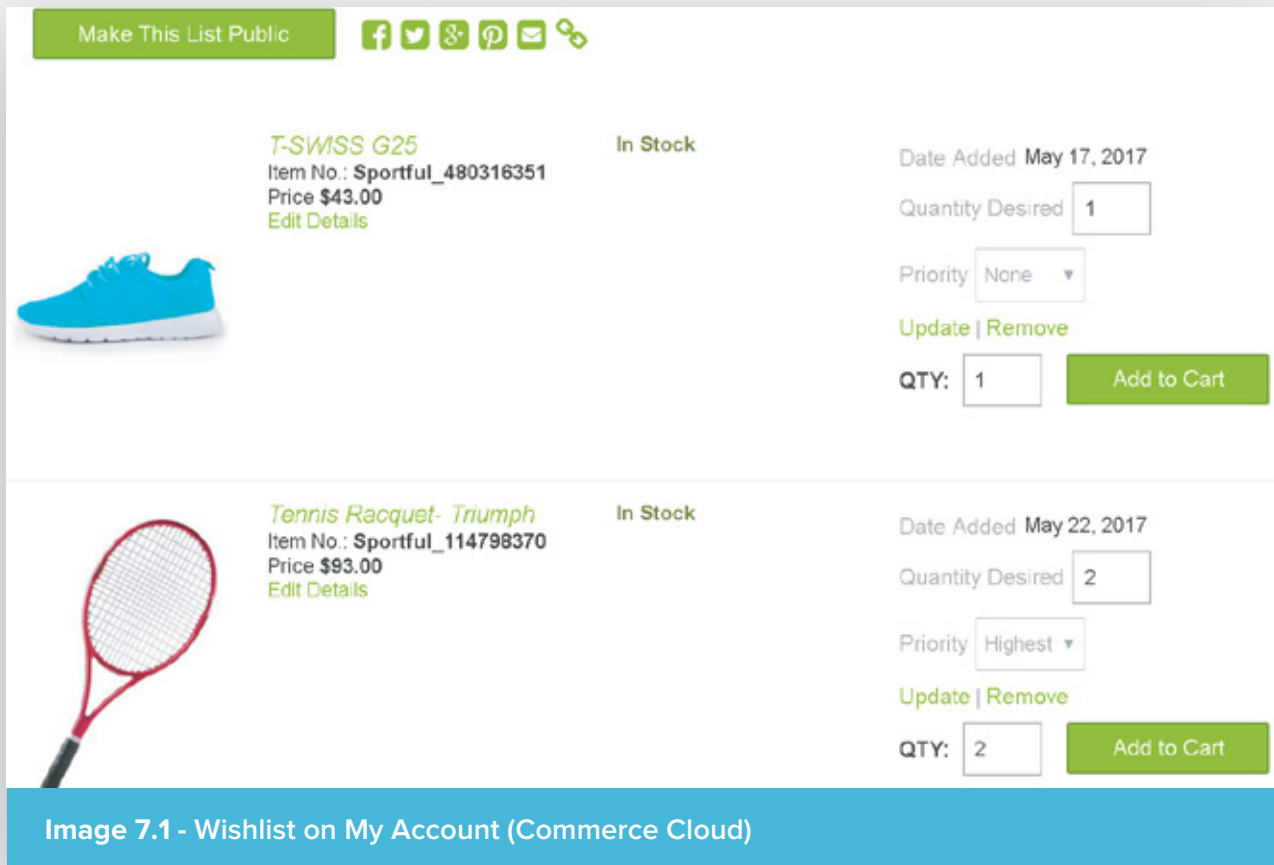
Table 7.2 – Wishlist Product (opportunity products) Mappings

Exporting Wishlists as Opportunities

Please note that the OSF UnifyCOMMERCE | DATA Integration works as described below only if the Wishlist actions are already implemented on the storefront (e.g. add product to wishlist, update quantity, remove product from wishlist etc).

1. On the Salesforce Commerce Cloud storefront, the registered customers have the possibility to add products to their Wishlist. The products added by customers in their Wishlist will be visible in My Account – Wishlist. In this section the customer has the possibility to see the date when the product was added to Wishlist, to select a quantity and add the product to basket and / or to remove the product from Wishlist. The user is also able to flag the Wishlist as public or add a Gift Certificate to it.

The products added / removed from the customer Wishlist will be exported to Salesforce when the “SalesforceSynchronizeRecordsExport” scheduled job will run.



- 2. Wishlist_Commerce Cloud Opportunity:** The Wishlist will be exported to Salesforce CRM when the “SalesforceSynchronizeRecordsExport” job will run. The customer Wishlist will be exported into Salesforce CRM as an opportunity and will have the generic name **Wishlist_Commerce Cloud**; all the products added / removed from wishlist will be listed in the opportunity products section. Please note that only one Wishlist_Commerce Cloud opportunity is created per customer, all the products modifications are updated in the Product related list on the opportunity.

The screenshot shows a Salesforce Opportunity record for 'Wishlist_Commerce Cloud'. The record is owned by Tom Jones and is in the 'Wishlist' stage with a probability of 80% and a close date of 6/26/2017. The account is 'Rachel Green' and the commerce cloud site is 'Sportful'. The total amount is \$229.00. The 'Additional Information' section shows that the opportunity is a wishlist, is not a public wishlist, and is synced by Unify Commerce. The 'System Information' section shows it was created by Tom Jones on 5/12/2017 and last modified by Tom Jones on 6/26/2017. The 'Products (Standard Price Book)' section lists three products: 'LYT Smart Q25' (1.00 quantity, \$0.00 sales price, removed from wishlist on 5/17/2017), 'T-SWISS G25' (1.00 quantity, \$43.00 sales price, added to wishlist on 5/17/2017), and 'Tennis Racquet-Triumph' (2.00 quantity, \$93.00 sales price, added to wishlist on 5/22/2017).

Opportunity Detail									
Opportunity Owner	Tom Jones [Change]				Close Date	6/26/2017			
Opportunity Name	Wishlist_Commerce Cloud				Stage	Wishlist			
Account Name	Rachel Green				Probability (%)	80%			
Commerce Cloud Site	Sportful				Amount	\$229.00			

Additional Information									
Is Abandoned Cart?	☐				Is Wishlist?	☒			
Latest Abandoned Cart	☐				Is Public Wishlist?	☐			
Abandoned Cart Creation Date					Is Removed Products List?	☐			
Abandoned Cart Last Modified Date					Synced by Unify Commerce	☒			
Recovered Abandoned Cart	☐								
Recovered Order No									

System Information									
Created By	Tom Jones, 5/12/2017 2:43 PM				Last Modified By	Tom Jones, 6/26/2017 1:17 PM			

Products (Standard Price Book)									
Action	Product	Quantity	Sales Price	Removed from Wishlist	Removed from Wishlist Date	Wishlist Added Date	Wishlist Product Priority	Removed Product Date	Total Price
Edit Del	LYT Smart Q25	1.00	\$0.00	☒	5/17/2017 1:26 PM		0		\$0.00
Edit Del	T-SWISS G25	1.00	\$43.00	☐		5/17/2017 8:42 AM	0		\$43.00
Edit Del	Tennis Racquet-Triumph	2.00	\$93.00	☐		5/22/2017 9:01 AM	1		\$186.00

Image 7.2 - Wishlist Opportunity created on Salesforce

- 3. Wishlist Opportunity Product – Added to the Wishlist:** The products added by customers in the Wishlist will be exported with the information specified in table “Table 1.2 – Wishlist Product (opportunity products) Mappings” and visible in the image below.

Opportunity Product Edit Layout | Printable View

T-SWISS G25 for Wishlist_Commerce Cloud

[Back to List: Accounts](#)

Opportunity Product Detail Edit Delete

▼ **Product Information**

Opportunity	Wishlist_Commerce Cloud	Date	
Product	T-SWISS G25	Quantity	1.00
Product Code	Sportful_480316351	Sales Price	\$43.00
List Price	\$43.00	Total Price	\$43.00
		Discount	

▼ **Additional Information**

Wishlist Added Date	5/17/2017 8:42 AM	Removed Product Date	
Wishlist Product Priority	0	Removed Product Basket ID	

0 - None
 1 - Highest
 2 - High
 3 - Medium
 4 - Low
 5 - Lowest

Created By: Tom Jones, 5/17/2017 12:46 PM Last Modified By: Tom Jones, 6/26/2017 1:15 PM

Line Description

Edit Delete

Image 7.3 - Wishlist Opportunity product details

- 4. Wishlist Opportunity Product – Removed from the Wishlist:** The products removed by customers from the Wishlist will be exported with the information specified in table “Table 7.2 – Wishlist Product (opportunity products) Mappings” and visible in the image below.

Opportunity Product Detail [Edit] [Delete]

▼ Product Information

Opportunity	Wishlist_Commerce Cloud	Date	
Product	LYT Smart Q25	Quantity	1.00
Product Code	Sportful_511565869	Sales Price	\$0.00
List Price	\$36.99	Total Price	\$0.00
		Discount	

▼ Additional Information

Wishlist Added Date	Removed Product Date
Wishlist Product Priority 0	Removed Product Basket ID
Removed from Wishlist ☒	
Removed from Wishlist Date 5/17/2017 1:26 PM	

▼ System Information

Created By Tom Jones, 5/12/2017 2:43 PM	Last Modified By Tom Jones, 5/17/2017 1:30 PM
Line Description	

[Edit] [Delete]

Image 7.4 - Wishlist Product (opportunity products) Mappings

Items to be taken into consideration regarding the export of Wishlist:

1. When a product part of the Wishlist will be removed by the customer from the Salesforce Commerce Cloud storefront, that product will remain in Salesforce, on the Wishlist opportunity, as an opportunity product but with the value of the field “Removed from Wishlist?” set to true and with the date/time at which the product was removed from the Wishlist set in the “Removed from Wishlist Date” field.
2. If a product which was previously removed from the Wishlist is re-added to it, it will be exported to Salesforce as a new opportunity product (associated with the appropriate Wishlist opportunity). The old product which was removed will still remain as part of the Wishlist and will be flagged with the two removed from Wishlist flags (“Removed from Wishlist?” and “Removed from Wishlist Date”).
3. The products which are removed from Wishlist will always have the value 0 for “Sales Price” (and “Total Price” as a result).

4. Tax/Shipping/Discounts are not exported for Wishlists.
5. Wishlists are exported only for registered customers.
6. Gift Certificates added to the Wishlist are exported to Salesforce as “Gift Total” opportunity products (associated with the appropriate Wishlist) with the value 0 for “Sales Price” (and “Total Price” as a result).

Removed Product Export

The customer adds products to his shopping cart on the Salesforce Commerce Cloud Storefront, and while reviewing his shopping cart he decides to remove some or all of his products. When the “SalesforceSynchronizeRecordsExport” scheduled job runs, the products removed from the shopping cart by the registered customers are exported to Salesforce CRM as opportunity products aggregated into a single opportunity. This information can be used by merchants to analyze and run product centric campaigns.

SFCC Field	Salesforce Field	Notes
N/A	Opportunity Name	The Name of the Opportunity in Salesforce is: "Removed Products_Commerce Cloud"
Salesforce account ID	Account (Lookup)	Used to associate the Removed Product List opportunity with the correct account in Salesforce
N/A	Stage	A new value will be added to the Stage field: "Removed products list" which will be used to identify Salesforce Commerce Cloud Removed product lists synced as Opportunities. The Salesforce Commerce Cloud Removed products list will be pushed with stage: Removed products list
N/A	Commerce Cloud ID	Removed Products List unique identifier generated by the Salesforce Commerce Cloud cartridge
N/A	Close Date	The date at which the Removed Product List was last modified
N/A	Is Removed Products List?	Used to identify Removed Product Lists
Siteld	Commerce Cloud Site	The site from which the Removed Product Lists was exported
N/A	Synced by OSF UnifyCOMMERCE DATA Integration	Sent as TRUE for the Removed Product Lists exported from Salesforce Commerce Cloud

Table 8.1 – Removed Product List (opportunity) Mappings

SFCC Field	Salesforce Field	Notes
N/A	Opportunity (Lookup)	The Commerce Cloud ID generated for the Removed Products List by the cartridge is exported in this field in order to link the Opportunity Item with the correct Opportunity
N/A	PriceBookEntry (Lookup)	The Commerce Cloud ID generated for the Price Book Entry is exported in this field in order to link the Opportunity Item with the correct Price Book Entry
N/A	Commerce Cloud ID	Removed Product unique identifier generated by the Salesforce Commerce Cloud cartridge
N/A	Removed Product Date	The date+time at which the product was removed from the shopping cart
N/A	Removed Product Basket ID	The ID of basket from which the product was removed
Size	Size	The size of the variation product is exported in this field (if available)

Table 8.2 – Removed Products (opportunity products) Mappings

Exporting Removed Product Lists as Opportunities

1. The registered customers adds a product to his shopping cart on the Salesforce Commerce Cloud storefront, he navigates to the shopping cart and clicks the “Remove” link for one or multiple products.

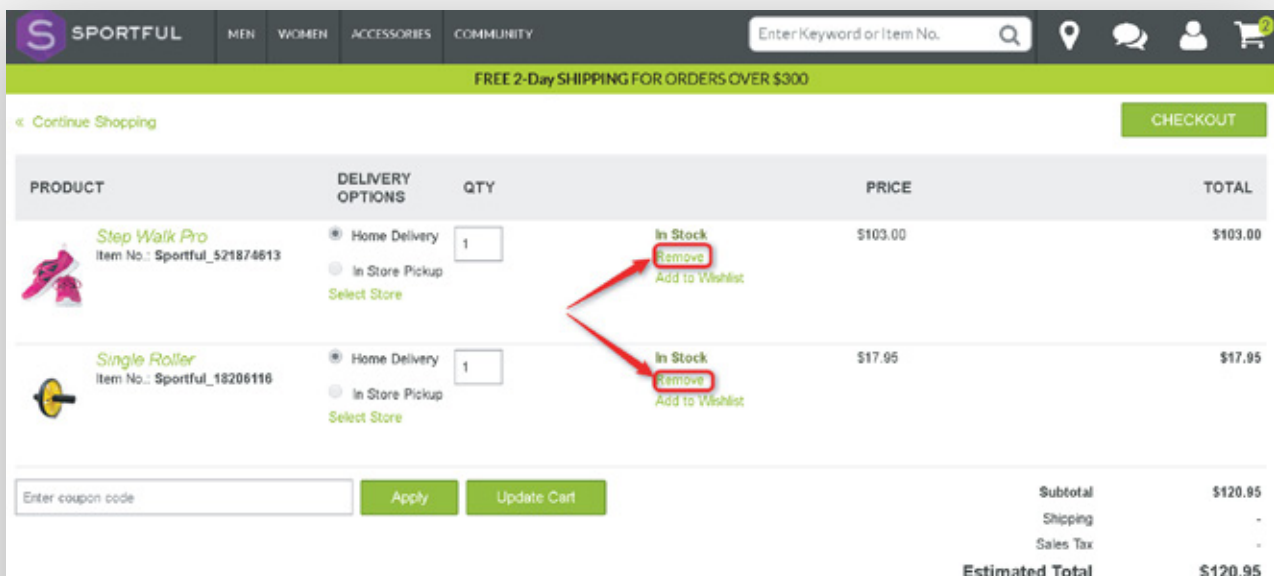


Image 8.1 – Removing a product from the cart

- 2. Removed Product List – Opportunity:** The removed product will be marked as “removed from shopping cart” and it will be exported to Salesforce when the “SalesforceSynchronizeRecordsExport” scheduled job will run, as part of an opportunity which will have the generic name “Removed Products_Commerce Cloud”. The Removed Products List opportunity will be created in Salesforce with the information specified in table “Table 1.1 – Removed Product List (opportunity) Mappings” and visible in the image below.

Opportunity
Removed Products_Commerce Cloud

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

Show Feed | Click to add topics

Back to List: Accounts

Products (Standard Price Book) (23) | Open Activities (0) | Activity History (0) | Quotes (0)

Opportunity Detail | Edit | Delete | Clone | Sharing

Opportunity Owner: Tom Jones (Change) | Close Date: 5/22/2017

Opportunity Name: **Removed Products_Commerce Cloud** | Stage: **Removed Products List**

Account Name: Rachel Green | Probability (%): 0%

Commerce Cloud Site: Sportful | Amount: \$3,542.54

Additional Information

Is Abandoned Cart? ☐ | Is Wishlist? ☐

Latest Abandoned Cart ☐ | Is Public Wishlist? ☐

Abandoned Cart Creation Date | Is Removed Products List? ☒

Abandoned Cart Last Modified Date | Synced by Unify Commerce ☒

Recovered Abandoned Cart ☐

Recovered Order No

System Information

Created By: Tom Jones: 5/12/2017 1:36 PM | Last Modified By: Tom Jones: 5/22/2017 9:05 AM

Edit | Delete | Clone | Sharing

Products (Standard Price Book) | Add Product | Edit All | Choose Price Book | Sort | Products (Standard Price Book) Help

Action	Product	Quantity	Sales Price	Removed from Wishlist	Removed from Wishlist Date	Wishlist Added Date	Wishlist Product Priority	Removed Product Date	Total Price
Edit Del	Akiden L10	5.00	\$68.00	☐				5/16/2017 9:07 AM	\$340.00
Edit Del	ANTEGO T300	5.00	\$113.00	☐				5/15/2017 3:25 PM	\$555.00
Edit Del	Barbell-Elite	1.00	\$40.35	☐				5/12/2017 2:50 PM	\$40.35

Image 8.2 – Removed Product opportunity on Salesforce

3. Removed Product – Opportunity Product: The products removed by customers from the shopping cart will be exported with the information specified in table “Table 8.2 – Removed Products (opportunity products) Mappings” and visible in the image below, and will be associated with the appropriate Removed Product Lists opportunity.

Opportunity Product
Akiden L10 for Removed Products_Commerce Cloud
Edit Layout | Printable View

Back to List: Accounts

Opportunity Product Detail Edit Delete

▼ Product Information

Opportunity	Removed Products_Commerce Cloud	Date	
Product	Akiden L10	Quantity	5.00
Product Code	Sportful_521861866	Sales Price	\$68.00
List Price	\$68.00	Total Price	\$340.00
		Discount	

▼ Additional Information

Wishlist Added Date		Removed Product Date	5/16/2017 9:07 AM
Wishlist Product Priority		Removed Product Basket ID	aba5c5d50bcc6e3e73fce7159
Removed from Wishlist	☐		
Removed from Wishlist Date			

▼ System Information

Created By	Tom Jones, 5/17/2017 12:46 PM	Last Modified By	Tom Jones, 6/26/2017 1:30 PM
Line Description			

Edit Delete

Image 8.3 – Removed Product opportunity with product details

Items to be taken into consideration regarding the export of Removed Product Lists:

1. There will be only one Removed Product List opportunity which will hold all the products removed from a shopping cart by a single customer
2. Tax, shipping and discounts are not exported for Removed Product Lists
3. If a product which is already part of the Removed Product List opportunity in Salesforce is added to the shopping cart on the Salesforce Commerce Cloud storefront and removed from the shopping cart, it will be exported to Salesforce as a new opportunity product resulting in two products which have the same name but different values in the “Removed Product Date” field to be part of the Removed Product List opportunity.

4. There is a job in Salesforce that can be set to run with a desired frequency, which will compare the products ordered with the products removed from the shopping cart since the last time the job ran, and will delete any opportunity products part of the Removed Product List opportunity which were ordered in this interval, resulting in a more accurate list of products removed from the shopping cart. When comparing the opportunity products from the Removed Product List with the order products from the orders placed, the job will also take into consideration product variation which belong to the same master product. As an example: the customer added to the shopping cart a yellow tie, but decided he doesn't like the color, and as a result he removed the yellow tie from the shopping cart and added a blue tie instead from the same master product, and ordered it. When the job will run in Salesforce, it will delete the yellow tie from the Removed Products opportunity since the blue tie from the same master product was ordered.

Abandoned Cart

When a customer adds products to his shopping cart but does not proceed to checkout to finish the purchase, the products from his shopping cart will be saved in an abandoned cart. This in turn will become an "Abandoned Cart" opportunity in Salesforce once the export of registered customers is performed successfully by the OSF UnifyCOMMERCE | DATA Integration.

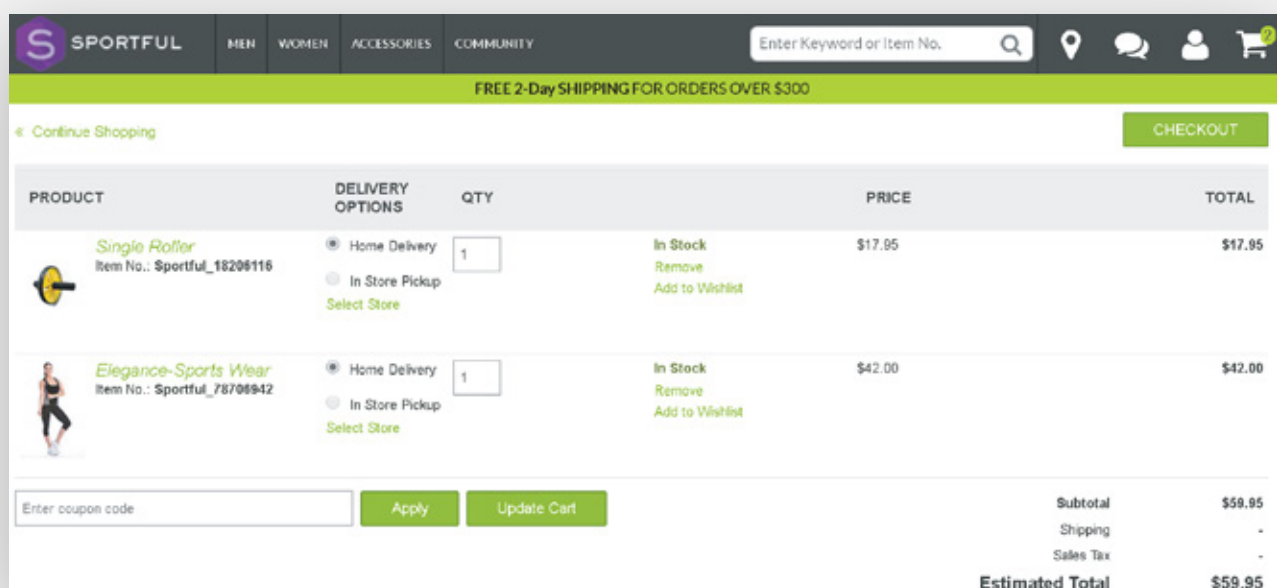
When the export of registered customers is completed with success, an Apex job will start in Salesforce CRM resulting in one of the following actions when the Apex job finishes:

1. Creation of an Abandoned Cart opportunity – if the user had products in his Salesforce Commerce Cloud shopping cart when the export of customers started, the Apex job which runs in Salesforce CRM, once the registered customers export is done, will create a new Abandoned Cart opportunity which will contain the products found in the shopping cart of the customer on the Commerce Cloud storefront
2. Update of an Abandoned Cart opportunity – if the user which already has an Abandoned Cart opportunity created, adds a new product to his existing shopping cart, removes a product from the shopping cart, updates the quantity of an existing product, updates the characteristics of an existing product or recovers the shopping cart, when the export of registered customers is done and the Apex job finishes running in Salesforce CRM, the Abandoned Cart opportunity will be updated in Salesforce to reflect the changes performed on the Salesforce Commerce Cloud storefront

3. Deletion of an Abandoned Cart opportunity – if the user removes all the products from his shopping cart or places the order without using the recovery link for the shopping cart, when the export of registered customers is done and the Apex job finishes running in Salesforce CRM, the Abandoned Cart Opportunity associated with the shopping cart which no longer exists in Salesforce Commerce Cloud will be deleted

How an Abandoned Cart is created

1. Customer opens the Salesforce Commerce Cloud storefront and adds products to his shopping cart



2. Customer did not complete the checkout process. Considering the CartUP (Cart Abandonment) Cartridge is properly installed, this will store the Abandoned Cart information in Salesforce Commerce Cloud Business Manager at the customer level:

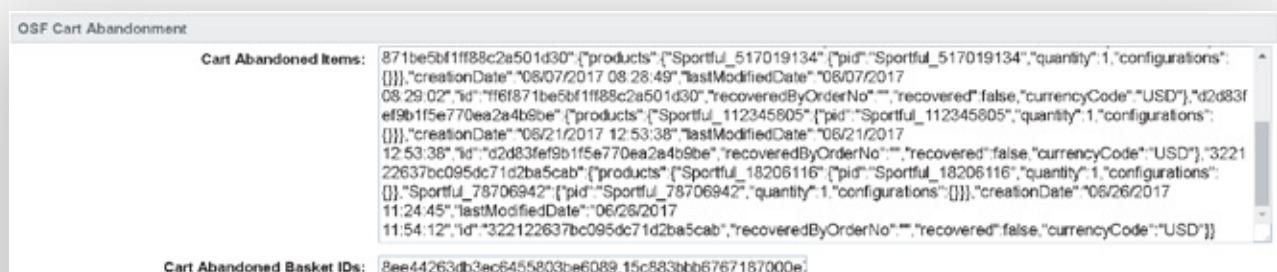


Image 9.1 – Cart created by the User on Salesforce Commerce Cloud

- During the export of registered customers (as per the set frequency), the information is moved to Salesforce where, once the registered customers export is successfully completed by the OSF UnifyCOMMERCE | DATA Integration, an Apex job will run which will create an Abandoned Cart opportunity

Opportunity Detail

Opportunity Owner: Tom Jones [Change] | Close Date: 6/26/2017

Opportunity Name: Abandoned Cart_Commerce Cloud_322122637bc095dc71d2ba5cab | Stage: Abandoned cart

Account Name: Rachel Green | Probability (%): 0%

Commerce Cloud Site: | Amount: \$59.95

Additional Information

Is Abandoned Cart? ☒ | Is Wishlist? ☐

Latest Abandoned Cart ☒ | Is Public Wishlist? ☐

Abandoned Cart Creation Date: 6/26/2017 1:24 PM | Is Removed Products List? ☐

Abandoned Cart Last Modified Date: 6/26/2017 1:54 PM | Synced by Unity Commerce ☒

Recovered Abandoned Cart ☐ | Recovered Order No:

System Information

Is Synced by Unity Commerce ☒

Products (Standard Price Book)

Action	Product	Quantity	Sales Price	Removed from Wishlist	Removed from Wishlist Date	Wishlist Added Date	Wishlist Product Priority	Removed Product Date	Total Price
Edit Del	Elegance-Sports Wear	1.00	\$42.00	☐					\$42.00
Edit Del	Single Roller	1.00	\$17.95	☐					\$17.95

Image 9.2 – Abandoned Cart opportunity on Salesforce

Please note the screenshot above is indicative and field placement, page layout, section may differ as per your organization.

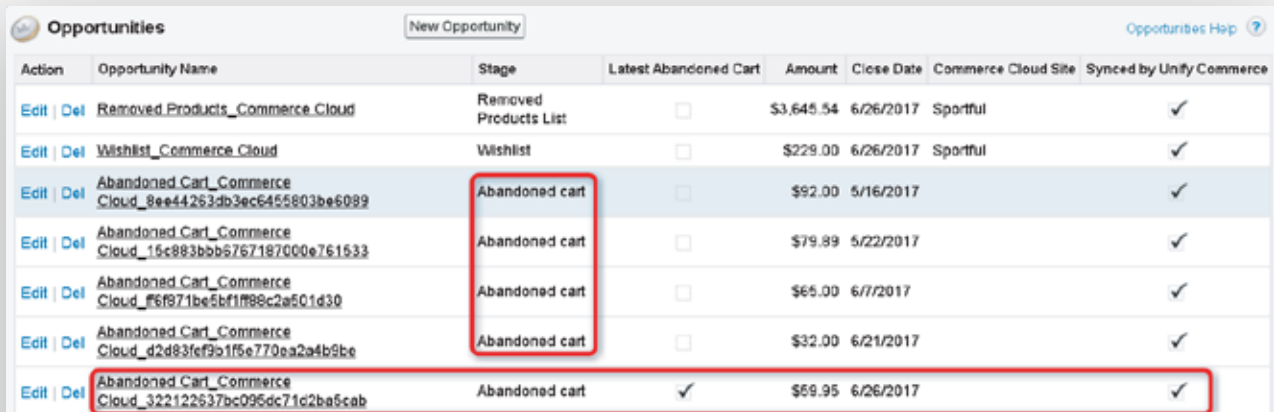
SFCC Field	Salesforce Field	Notes
N/A	Opportunity Name	The Name of the Opportunity in Salesforce is: "Abandoned Cart_Commerce Cloud_{basketId}"
N/A	Account (Lookup)	The account to which the Abandoned Cart is related
N/A	Stage	A new value will be added to the Stage field: "Abandoned cart" which will be used to identify "Abandoned carts" processed as Opportunities.
N/A	Is Abandoned Cart?	When an Opportunity is created as the result of processing the Abandoned Cart JSON from the Person Account the value of this field will be set as TRUE
N/A	Close Date	The date at which the Abandoned Cart JSON from the Person Account was processed and the Opportunity was created
N/A	Commerce Cloud ID	The Basket ID of the abandoned cart
N/A	Latest Abandoned Cart	If there are multiple abandoned carts for the same account, this field will be set to TRUE only for the latest abandoned cart
recovered	Recovered Abandoned Cart	The value from the "recovered" field from the JSON is saved in this field when the Abandoned Cart JSON is processed
recoveredByOrderNo	Recovered Order No	The value from the "recoveredByOrderNo" field from the JSON is saved in this field when the Abandoned Cart JSON is processed
creationDate	Abandoned Cart Creation Date	The value from the "creationDate" field from the JSON is saved in this field when the Abandoned Cart JSON is processed
lastModifiedDate	Abandoned Cart Last Modified Date	The value from the "lastModifiedDate" field from the JSON is saved in this field when the Abandoned Cart JSON is processed

Table 9.1 – Abandoned Cart (opportunity) mappings

Salesforce Commerce Cloud Field	Salesforce Field
Pid	Product (Lookup)
Quantity	Quantity

Table 9.2 – Abandoned Cart Product (opportunity product) mappings

4. The Abandoned cart information is also reflected on the Account page on the Opportunities related list



Action	Opportunity Name	Stage	Latest Abandoned Cart	Amount	Close Date	Commerce Cloud Site	Synced by Unify Commerce
Edit Del	Removed_Products_Commerce_Cloud	Removed Products List	☐	\$3,645.54	6/26/2017	Spartful	✓
Edit Del	Wishlist_Commerce_Cloud	Wishlist	☐	\$229.00	6/26/2017	Spartful	✓
Edit Del	Abandoned_Cart_Commerce_Cloud_8ee44263db3ec6455803be6099	Abandoned cart	☐	\$92.00	5/16/2017		✓
Edit Del	Abandoned_Cart_Commerce_Cloud_15c883bbb5767187000e761533	Abandoned cart	☐	\$79.89	5/22/2017		✓
Edit Del	Abandoned_Cart_Commerce_Cloud_f6f871be5bf1f88c2a501d30	Abandoned cart	☐	\$65.00	6/7/2017		✓
Edit Del	Abandoned_Cart_Commerce_Cloud_d2d83fef9b1f5e770ea2a4b6be	Abandoned cart	☐	\$32.00	6/21/2017		✓
Edit Del	Abandoned_Cart_Commerce_Cloud_322122637bc095dc71c2ba5cab	Abandoned cart	☒	\$59.95	6/26/2017		✓

Image 9.3 – Abandoned cart opportunity reflect in related list

How an Abandoned Cart is recovered

- The URL which can be used to recover the Abandoned Cart is composed from two parts:
 - A static part:
<https://www.samplesfccsite.com/on/demandware.store/Sites-SampleSFCCSite-Site/default/CartAbandonment-Reconstruct?basketId=>
 - And a dynamic part which is the basket ID, and which is different for each abandoned cart e.g. c7181f13006208134df2d6be59

An example of a complete recovery URL for an abandoned cart can be found below, it has both the static part, and the basket ID of the abandoned cart. The basket ID is saved on the abandoned cart opportunities, in the field: Commerce Cloud ID (API Name: OSF_DWback__DW_ID__c).

<https://www.samplesfccsite.com/on/demandware.store/Sites-SampleSFCCSite-Site/default/CartAbandonment-Reconstruct?basketId=c7181f13006208134df2d6be59>

- The user receives the Abandoned Cart recovery URL through an email sent by the marketing service. Please take note that the Abandoned Cart implementation does not provide automatic email sending for the abandoned cart opportunities created, as this is most of the time done through another marketing service e.g. Salesforce Marketing Cloud or any email service provider.

3. The user clicks the recovery link received, he is presented with his abandoned shopping cart and he finishes the checkout
4. Once the user orders the shopping cart from the email link, the shopping cart will be flagged as recovered in Salesforce Commerce Cloud, and the number of the order will be saved. When the export of registered customers is done and the Apex job finishes running in Salesforce CRM, the Abandoned Cart opportunity will be updated with the “Recovered” flag and the “Recovered Order No”.

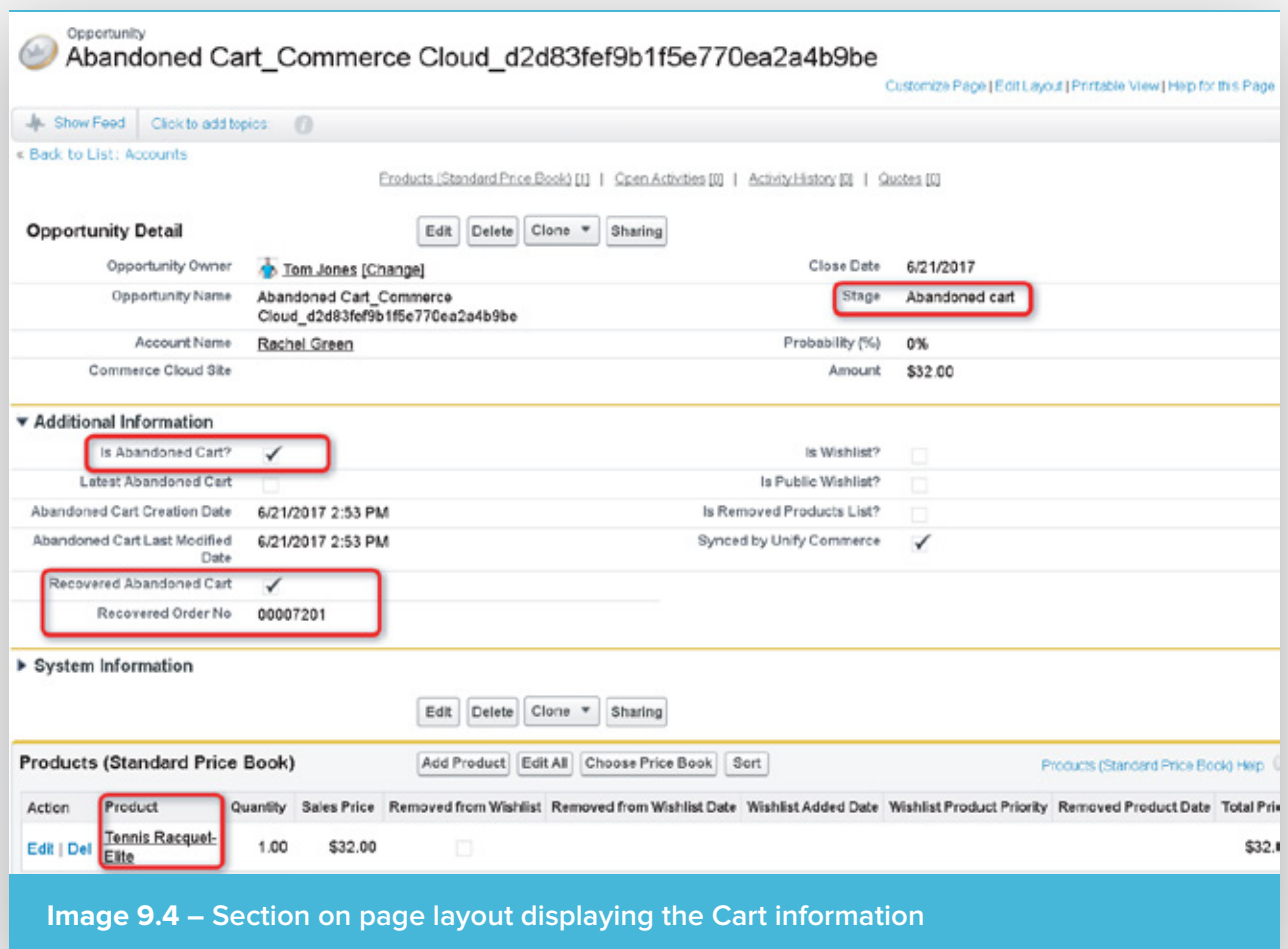


Image 9.4 – Section on page layout displaying the Cart information

Items to be taken into consideration regarding the Abandoned Cart functionality:

1. If the user clicks an Abandoned Cart link for a shopping cart which is no longer the latest one, the products from the shopping cart which is being recovered will be added to the latest shopping cart, resulting in a shopping cart which displays both the products from the shopping cart which was being recovered and the products part from the shopping cart before the recovery link was clicked.
2. The Abandoned Cart information is saved only for registered customers.

Key Indicators Overview

The Salesforce CRM package for OSF UnifyCOMMERCE | DATA Integration also includes a Visual Force page which can be added to the Person Account layout. This KPI page aggregates information related to the account and displays it in a user friendly manner. The records to be aggregated by the KPI page are set as specified in section „3.2 Setup KPI Settings on Record Types” from the document „OSF UnifyCommerce – DATA Integration – SF Installation Guide”. The page has multiple sections of which the most important are:

- 1. Ordered Value** – A sum of all Total Order Amounts for all the Orders related to the Person Account, which were flagged to be aggregated by the KPI page.
- 2. No. of Orders** – The total number of Orders related to the Person Account which were flagged to be aggregated by the KPI page.
- 3. Average Order** – The amount ordered by the customer on average (Ordered Value/No. of Orders – which were flagged to be aggregated by the KPI page).
- 4. In-Store Orders** – The sum of all Orders related to the Person Account which were flagged to be aggregated by the KPI page as In-Store Orders. This can only be used if your organization also has integration with a POS system in order to import all offline orders of the customers in Salesforce and the orders imported via the POS integration are flagged as specified in the section „3.2 Setup KPI Settings on Record Types” from the document „OSF UnifyCommerce – DATA Integration – SF Installation Guide”.
- 5. Online Orders** – The sum of all Orders related to the Person Account which are not placed In-Store.
- 6. Customer Since** – The date at which the customer was created in Salesforce
- 7. Average Logins/Month** – If the Person Account also has access to the COMMUNITY, in this section you’ll be able to see the average of logins per month performed by the customer in the Salesforce COMMUNITY.
- 8. No. of Cases** – The total number of cases related to the Person Account. If the number of cases is higher than 10, the icon for the No. of Cases section will turn red.

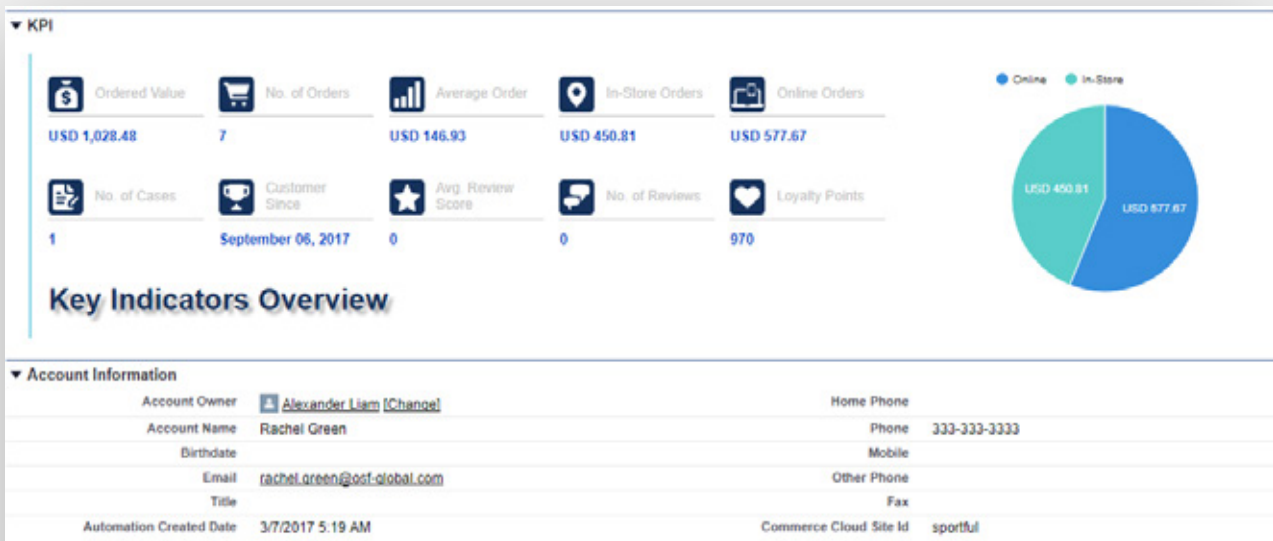


Image 10.1 – The Key Indicators Overview page displayed on the Person Account layout

Edit Commerce Cloud Settings [Save] [Save & New] [Cancel]

Commerce Cloud Settings Information

Name: DataIntegrationSettings

Add to Cart URL:

Average Logins Month: ☒

Average Order: ☒

Avg Review Score: ☒

Customer Since: ☒

Commerce Cloud Order Record Type: B2C_Order

Commerce Cloud Opportunity Record Type: B2C_Opportunity

In Store Orders: ☒

Loyalty Points: ☒

No of Cases: ☒

No of Orders: ☒

No of Reviews: ☒

OCAPI Client Id:

OCAPI URL:

Online Orders: ☒

Order Statuses Included in KPI: New, Activated, Opened, Oper

Ordered Value: ☒

Personalize SFCC Banner Pipeline:

Personalize SFCC Banner: ☐

Pipeline Token:

Site Id:

Site URL:

Visited Products: ☒

OCAPI Version:

Pie chart: ☒

Image 10.2 – Custom Settings for the Key Indicators Visual Force page

If your Salesforce organization does not have use for some of the sections displayed in the Key Indicators Overview Visual Force page, these can be hidden from the Custom Settings. In order to access these Custom Settings go to: Setup > Develop > Custom Settings, click the Manage link for the „Commerce Cloud Settings”, and then click Edit for the „DataIntegrationSettings” settings list. On the page that loads, check (if you want a section added), or uncheck (if you want a section removed) the checkbox for that section. Once the checkboxes have been checked or unchecked click the Save button to save the changes.



Thanks for your interest in
OSF UnifyCOMMERCE | DATA Integration.
If you have any questions, contact us at
info@osf-commerce.com