

Connector for Google Shopping and Salesforce Order Management

Installation Guide



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1. Prerequisites

You can install Connector for Google Shopping and Salesforce Order Management when logged in as administrator to Salesforce.com. The app can be installed in Professional, Enterprise, Force.com, Developer, and Unlimited editions.

Important: Before installing Connector for Google Shopping and Salesforce Order Management follow these steps:

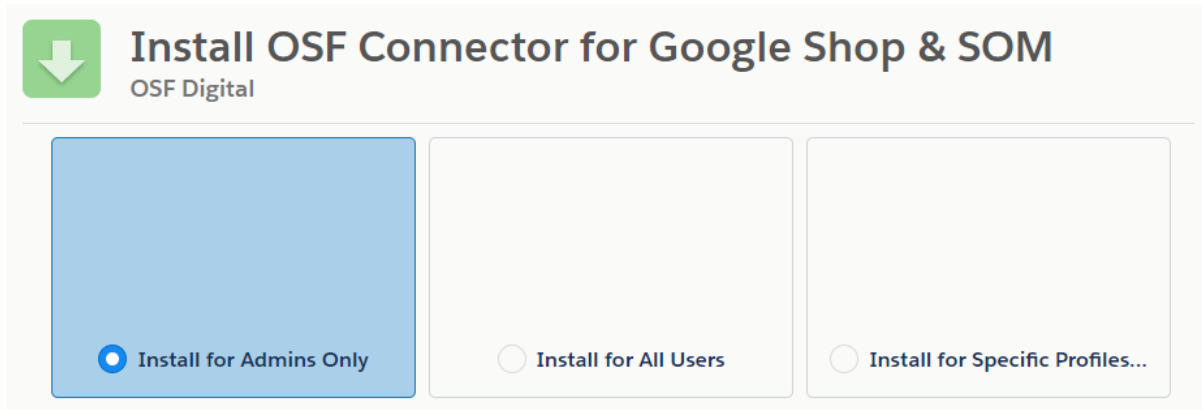
1. Install and configure **Order Management**. See the Salesforce Order Management implementation guide for further info.
2. Enable **Chatter**. Go to Setup> Chatter Settings > Enable.
3. Enable **Person Accounts**.
4. From **Setup**, search for *Profiles* in the **Quick Find** box, then select **Profiles**.
5. In the list of profiles, select **System Administrator**.
6. In the **Find Settings** box, enter *Account* and select it from the list.
7. Click **Edit**.
8. In the **Selected Record Types** section, move **Master** to the Available Record Types box, then move **Business Account** and **Person Account** to the **Selected Record Types** box.
9. Set both the **Default Record Type** and the **Business Account Default Record Type** to Business Account.
10. Set the **Person Account Default Record Type** to Person Account.
11. Click **Save**.

2. Installing the Connector

To install the connector:

1. Access **Connector for Google Shopping and Salesforce Order Management** on AppExchange.
2. Click the **Get It Now** button on the AppExchange page.

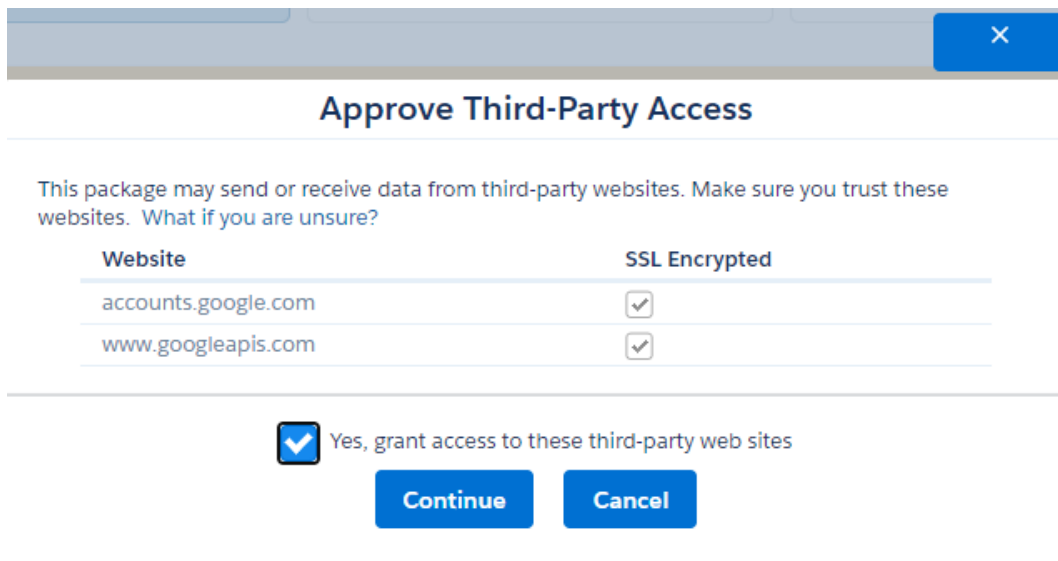
3. Choose where to install the product: Production or Sandbox.
4. To begin the installation, select *I have read and agree to the terms and conditions*, and click **Confirm and Install**.
5. Enter your credentials.
6. Choose a security level, then click **Install** to continue the installation.



Install OSF Connector for Google Shop & SOM
OSF Digital

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

7. On the **Approve Third-Party Access** pop-up, select *Yes, grant access to these third-party web sites*.



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
accounts.google.com	☒
www.googleapis.com	☒

☒ Yes, grant access to these third-party web sites

Continue **Cancel**

8. Click **Continue**.
9. After the installation process is completed, click **Done** on the *Install Complete* notification.



Install OSF Connector for Google Shop & SOM

OSF Digital



Installation Complete!

Done

3. Configuration

3.1. PAYMENT GATEWAY SETTINGS

1. In App Launcher, search for *Payment Gateways*.
2. Open the existing Payment Gateway, then click **Edit**.
3. Set the Payment Gateway Name with the *ExternalPaymentGateway* value.

Payment Gateway

* Payment Gateway Name

ExternalPaymentGateway

* Payment Gateway Provider

payeezyAdapter

* Merchant Credential

Test_NC

* Status

Active

External Reference

Comments

Cancel

Save & New

Save

3.2.CREATE SALES CHANNELS

1. In **App Launcher**, search for *Sales Channels*.
2. Create a New Sales Channel.
3. Set the **Sales Channel Name** as *Google*.

New Sales Channel

Sales Channel Information

* Sales Channel Name
Google

Description
Sales channel for Google shop.

External Channel Number

Cancel Save & New Save

5.1. PRICE BOOK

1. In **App Launcher**, search for *Price Books*.
2. On the **Price Books** list, select **Standard Price Book** and then **Edit**.
3. Make sure the **Active** checkbox is selected.

Note: If the Standard Price Book does not exist, please create it as shown below.

Price Book
Standard Price Book

Related

Price Book
Standard
Description
Created By
OSF

Edit Standard Price Book

* Price Book Name
Standard Price Book

Description

Created By
OSF Admin, 8/14/2020, 1:07 AM

Active
☒

Is Standard Price Book
☒

Last Modified By
Tayfun Esmer, 9/11/2020, 12:46 AM

Cancel Save & New Save

3.4. LOCATION

1. In **App Launcher**, search for *Locations*.
2. On the **All Locations** list, check if at least one location in the **Location Type** is set to Warehouse.
3. If you don't find a Warehouse location, create a new location.

Edit Warehouse

Information

* Location Name

Location Name

Visitor Address

Search Addresses... 

* Location Type

Warehouse 

Time Zone

--None-- 

Description

Driving Directions

Parent Location

Search Locations... 

System Information

Created By

Tayfun Esmer, 6/25/2020, 6:38 AM

Last Modified By

Tayfun Esmer, 6/25/2020, 6:38 AM

Owner

Tayfun Esmer

Cancel

Save & New

Save

3.5. SET ORGANIZATION-WIDE EMAIL ADDRESSES

1. Go to **Setup > Email > Organization-Wide Addresses**.
2. Click **Add**.


SETUP
Organization-Wide Addresses

Edit Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Save Save and New Cancel

Organization-Wide Email Address
! = Required Information

Display Name
Email Address

☒ Allow All Profiles to Use this From Address
☐ Allow Only Selected Profiles to Use the From Address

Profiles

Minimum Access - Salesforce
Identity User
Service Cloud
Customer Portal Manager
System Administrator
Standard Platform User
Partner User
Authenticated Website
High Volume Customer Portal
Force.com - Free User

Save Save and New Cancel

- Specify the **Display Name** and the **Email Address** in the corresponding fields.
- Specify whether to use this address for all or selected Profiles. Select the profiles you need.
- Click **Save**.

Note: When emails are sent to customers, the sender email is the address that you set using these steps.

3.6. CUSTOM METADATA SETTINGS

3.6.1. Google Service Account

- Go to **Setup>Custom Code>Custom Metadata Types**.
- Click **Manage Records** for Google Service Account metadata.
- Click **Edit** for Default record.
- Set Google Service Account Label and Google Service Account Name with a **Default** value.

- For the other fields: ClientEmail, MerchantKey, MerchantId, and PrivateKey, use the values received from Google.

The screenshot shows the 'Custom Metadata Types' setup page. Under the 'Google Service Account (Managed)' section, there is a yellow warning box stating: 'This Google Service Account is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below this is the 'Google Service Account Edit' form. The form has tabs for 'Information', 'Keys', and 'Permissions'. The 'Information' tab is active, showing fields for 'Label' (Default), 'Google Service Account Name' (Default), 'ClientEmail' (yourClientEmail), 'MerchantKey' (yourMerchantKey), 'MerchantId' (yourMerchantId), 'PrivateKey' (yourPrivateKey), and 'Namespace Prefix' (OsfOmsGoogle). A red vertical bar on the left of the 'Label' and 'Google Service Account Name' fields indicates required information. The form includes 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

3.6.2. Endpoint

The Order Management System calls the configured Google APIs. The default configurations point to Google API's production environment.

To use the Google API's test environment:

- Go to **Setup > Custom Code > Custom Metadata Types**.
- Click **Manage Records** for Endpoint metadata.
- Edit each record and configure the test environment values.

3.6.3. Carrier

The United States carriers used by Google are already included in the installation package. For France, the carriers need to be added manually.

To add a new Carrier:

1. Go to **Setup>Custom Code>Custom Metadata Types**.
2. Click **Manage Records** to edit the Carrier section.
3. View all values.
4. You can add new values or edit existing ones.

Note: The Carrier Text is the name displayed in the User Interface; the Carrier Value is the value accepted by Google.

5. Set the External Channel to a Google value.

SETUP Custom Metadata Types

Carrier [Help for this Page](#)

Carrier Edit

Information ! = Required Information

Label	Google United Parcel Service	Protected Component	☐ i
Carrier Name	United_Parcel_Service i	Namespace Prefix	OsfGoogleCnct
Carrier Text	United Parcel Service		
Carrier Value	ups		
External Channel	Google		

3.6.4. Change Reason

The installation package includes standard reasons used by Google for product cancel, reject, and return.

To add new Reasons:

1. Go to **Setup>Custom Code>Custom Metadata Types**.
2. Click **Manage Records** to edit the Change Reason section.
3. View all values.
4. Add new values or edit the existing ones.

The Reason Text is the name displayed in the User Interface; the Reason Value is the value accepted by Google. You should select the Change Type according to the place where the reason is used.

- Cancel for Cancel reasons
 - Reject for Reject reasons
 - Return for Return reasons
5. Set the External Channel with a Google value.

The screenshot shows the 'Custom Metadata Types' setup page. The main heading is 'Change Reason'. Below it, there's a 'Change Reason Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into two main sections: 'Information' and 'Protected Component'. The 'Information' section contains fields for 'Label' (Cancel Google No Inventory), 'Change Reason Name' (Cancel_Google_No_Inventor), 'External Channel' (Google), 'Reason Text' (No Inventory), 'Reason Value' (noInventory), and 'Change Type' (Cancel). The 'Protected Component' section has a 'Namespace Prefix' field (OsfGoogleCnct). A dropdown menu for 'Change Type' is open, showing options: Cancel, Reject, and Return. A red bar at the top of the form indicates required information.

3.6.5. Email

To send emails to customers using a defined sender address, configure the following:

1. Go to Setup **Custom Code**>**Custom**>**Metadata Types**.
2. Click **Manage Records** for Email.
 - a. Select **Order Return Item Notification**>**Edit**
 - b. In the SenderAddress field use same email address used for configuring [Organization-Wide Addresses](#).
 - c. Click **Save**.

SETUP
Custom Metadata Types

Email [Help for this Page](#)

Email Edit

Information ! = Required Information

Label	Order Return Item Notification	Protected Component	☐ ?
Email Name	Order_Return_Item_Notification	Namespace Prefix	OsfGoogleCnct
Action	OrderReturnItemsNotification		
Subject			
SenderAddress	yourEmailAddress@domain.		
Signature			
Enabled	☒		
Permission Sets	Order Management Agent		

- d. Select **Return Label Email**>**Edit**
- e. In the SenderAddress field use same email address used for configuring [Organization-Wide Addresses](#).
- f. Set your **Signature**.
- g. Click **Save**.

SETUP Custom Metadata Types

Email [Help for this Page](#)

Email Edit [Save](#) [Save & New](#) [Cancel](#)

Information * Required Information

Label Protected Component ☐ [i](#)

Email Name [i](#) Namespace Prefix osforms

Action

Subject

SenderAddress

Signature

Enabled ☐

Permission Sets

[Save](#) [Save & New](#) [Cancel](#)

Note: For the app to work, do not modify the Action field.

- For Order Return Item Notification: action OrderReturnItemsNotifications.
- For Return Label Email: action ReturnLabel.

4. Setup Rights (Enterprise Edition)

4.1. SETUP PROFILE'S RIGHTS

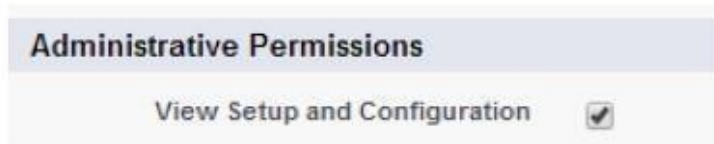
1. Go to **Setup > Manage Users > Profiles** and edit the profile(s) that need to access the app.
2. In the **Custom Tab Settings** section, set the **Exception Logs** and **Order Return Items** fields to **Default On**.

Custom Tab Settings

Exception Logs [v](#)

Order Return Items [v](#)

3. Select the **View Setup and Configuration** option from the Administrative Permissions section.



4. In the **Custom Object Permissions** section, make sure you have **Read, Create, Edit, Delete, View All,** and **Modify All** as available options for Exception Logs and Order Return Items.

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Exception Logs	✓	✓	✓	✓	✓	✓

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Order Return Items	✓	✓	✓	✓	✓	✓

4.2. SETUP FIELDS VISIBILITY

On the same profile that you set up, go to the **Field-Level Security** section.

Next to each object, click **View** to check Read and Edit access for every field.

Make sure that the settings for each of the following objects are the same as in the screenshots.

1. **Order** (Acknowledged, Is External Order, Order Source, and Updated Order Merchant Id fields)

Order Field-Level Security for profile
System Administrator

[Help for this Page](#) 

Save Cancel			
Field Name	Field Type	Read Access	Edit Access
Account Name	Lookup	☒	☒
Account Number	Text	☒	☐
Acknowledged	Checkbox	☒	☒
Activated By	Lookup	☒	☐
Activated Date	Date/Time	☒	☐
Billing Address	Address	☒	☒
Billing Email Address	Email	☒	☒
Billing Phone Number	Phone	☒	☒
Bill To Contact	Lookup	☒	☒
Company Authorized By	Lookup	☒	☒
Company Authorized Date	Date	☒	☒
Contract End Date	Date	☒	☐
Contract Name	Text	☒	☐
Contract Number	Lookup	☒	☒
Created By	Lookup	☒	☐
Customer Authorized By	Lookup	☒	☒
Customer Authorized Date	Date	☒	☒
Description	Long Text Area	☒	☒
Is External Order	Checkbox	☒	☒
Last Modified By	Lookup	☒	☐
Opportunity	Lookup	☐	☐
Order Amount	Currency	☒	☐
Ordered Date	Date/Time	☒	☒
Order End Date	Date	☒	☒
Order Name	Text	☒	☒
Order Number	Auto Number	☒	☐
Order Owner	Lookup	☒	☒
Order Reference Number	Text	☒	☒
Order Source	Picklist	☒	☒
Order Start Date	Date	☒	☒
Order Type	Picklist	☒	☒
Original Order	Lookup	☒	☐

Order Type	Picklist	☒	☒
Original Order	Lookup	☒	☐
PO Date	Date	☒	☒
PO Number	Text	☒	☒
Price Book	Lookup	☒	☐
Reduction Order	Checkbox	☒	☐
Related Order	Lookup	☒	☐
Sales Channel	Lookup	☒	☒
Sales Store	Lookup	☐	☐
Shipping Address	Address	☒	☒
Ship To Contact	Lookup	☒	☒
Status	Picklist	☒	☒
Tax Locale Type	Picklist	☐	☐
Total Adjusted Delivery Amount	Currency	☒	☐
Total Adjusted Delivery Amount with Tax	Currency	☐	☐
Total Adjusted Delivery Tax	Currency	☒	☐
Total Adjusted Product Amount	Currency	☒	☐
Total Adjusted Product Amount with Tax	Currency	☐	☐
Total Adjusted Product Tax	Currency	☒	☐
Total Delivery Distributed Adjustments	Currency	☒	☐
Total Delivery Distributed Adjustments with Tax	Currency	☐	☐
Total Delivery Distributed Adjustment Tax	Currency	☒	☐
Total Product Distributed Adjustments	Currency	☒	☐
Total Product Distributed Adjustments with Tax	Currency	☐	☐
Total Product Distributed Adjustment Tax	Currency	☒	☐
Total Tax	Currency	☒	☐
Total with Tax	Currency	☒	☐
Updated Order Merchant Id	Checkbox	☒	☒
Save Cancel			

2. Order Product (Currency and External Id fields)

Order Product Field-Level Security for profile
System Administrator [Help for this Page](#) ?

Field Name	Field Type	Read Access	Edit Access
Adjusted Product Subtotal	Currency	☒	☐
Adjusted Product Subtotal Tax	Currency	☒	☐
Adjusted Product Subtotal with Tax	Currency	☐	☐
Available Quantity	Number	☒	☐
Created By	Lookup	☒	☐
Currency	Text	☒	☒
Distributed Order Adjustments	Currency	☒	☐
Distributed Order Adjustments Tax	Currency	☒	☐
Distributed Order Adjustments with Tax	Currency	☐	☐
End Date	Date	☒	☒
External Id	Text	☒	☒
Gross Unit Price	Currency	☒	☒
Last Modified By	Lookup	☒	☐
Line Description	Text	☒	☒
Line Number	Number	☒	☒
List Price	Currency	☒	☐
Order	Lookup	☒	☒
Order Delivery Group	Lookup	☒	☒
Order Product Number	Auto Number	☒	☐
Original Order Product	Lookup	☒	☐
Product	Lookup	☒	☒
Product Adjustments	Currency	☒	☐
Product Adjustments Tax	Currency	☒	☐
Product Adjustments with Tax	Currency	☐	☐
Product Code	Text	☒	☐
Product Subtotal	Currency	☒	☒
Product Subtotal (Rounded)	Currency	☐	☐
Product Subtotal (Rounded) with Tax	Currency	☐	☐
Product Subtotal Tax	Currency	☒	☐

Product Subtotal Tax	Currency	☐	☐
Quantity	Number	☒	☒
Related Order Product	Lookup	☒	☐
Start Date	Date	☒	☒
Total Adjustments	Currency	☒	☐
Total Adjustments Tax	Currency	☐	☐
Total Adjustments with Tax	Currency	☐	☐
Total Amount with Tax	Currency	☐	☐
Total Price	Currency	☒	☐
Total Tax	Currency	☒	☐
Type	Picklist	☒	☒
Type Code	Picklist	☒	☒
Unit Price	Currency	☒	☒

3. Order Summary (Is External Order field)

Order Summary Field-Level Security for profile
 System Administrator

[Help for this Page](#) ?

Save Cancel			
Field Name	Field Type	Read Access	Edit Access
Account	Lookup	✓	✓
Billing Address	Address	✓	✓
Billing Contact	Lookup	✓	✓
Billing Email Address	Email	✓	✓
Billing Phone Number	Phone	✓	✓
Change Order	Lookup	✓	✓
Description	Long Text Area	✓	✓
Is External Order	Checkbox	☒	☐
Order Adjustments	Currency	✓	☐
Order Adjustments Tax	Currency	✓	☐
Order Adjustments with Tax	Currency	✓	☐
Ordered Date	Date/Time	✓	✓
Order Life Cycle Type	Picklist	✓	✓
Order Product Adjustments	Currency	✓	☐
Order Product Adjustments Tax	Currency	✓	☐
Order Product Adjustments with Tax	Currency	✓	☐
Order Shipping Adjustments	Currency	✓	☐
Order Shipping Adjustments Tax	Currency	✓	☐
Order Shipping Adjustments with Tax	Currency	✓	☐
Order Summary Number	Text	✓	✓
Original Order	Lookup	✓	✓
Owner Name	Lookup	✓	✓
Pretax Subtotal	Currency	✓	☐
Sales Channel	Lookup	✓	✓
Shipping	Currency	✓	☐
Shipping Tax	Currency	✓	☐
Shipping with Tax	Currency	✓	☐
Status	Picklist	✓	✓
Subtotal	Currency	✓	☐
Subtotal Tax	Currency	✓	☐
Subtotal with Tax	Currency	✓	☐
Tax	Currency	✓	☐
Tax Locale Type	Picklist	✓	✓
Total	Currency	✓	☐
Save Cancel			

4. **Shipment** (Carrier Name, External Shipment Id, Fulfillment Order, Status, Tracking Number, and Tracking URL fields)

Shipment Field-Level Security for profile
System Administrator [Help for this Page](#)

Field Name	Field Type	Read Access	Edit Access
Actual Delivery Date	Date/Time	☐	☐
Carrier Name	Text	☒	☒
Created By	Lookup	☒	☐
Created Date	Date/Time	☒	☐
Delivered To	Lookup	☐	☐
Description	Long Text Area	☐	☐
Destination Location	Lookup	☒	☒
Expected Delivery Date	Date/Time	☐	☐
External Shipment Id	Text	☒	☒
Fulfillment Order	Lookup	☒	☒
Last Modified By	Lookup	☒	☐
Last Modified Date	Date/Time	☒	☐
Owner Name	Lookup	☒	☒
Ship From Address	Address	☐	☐
Shipment Number	Auto Number	☒	☐
Shipping Provider	Picklist	☐	☐
Ship To Address	Address	☐	☐
Ship To Name	Text	☒	☒
Source Location	Lookup	☒	☒
Status	Picklist	☒	☒
Tracking Number	Text	☒	☒
Tracking URL	URL	☒	☒

5. **Exception Log** (Class Name, Custom Message, Exception Cause, Exception Message, Exception Type, Line Number, Method Name, Module Name, and Stack Trace fields)

Exception Log Field-Level Security for profile
System Administrator

[Help for this Page](#) ?

Save Cancel			
Field Name	Field Type	Read Access	Edit Access
Class Name	Text	☒	☒
Created By	Lookup	☒	☐
Custom Message	Text Area	☒	☒
Exception Cause	Rich Text Area	☒	☒
Exception Log Name	Auto Number	☒	☐
Exception Message	Long Text Area	☒	☒
Exception Type	Text	☒	☒
Last Modified By	Lookup	☒	☐
Line Number	Number	☒	☒
Method Name	Text	☒	☒
Module Name	Text	☒	☒
Owner	Lookup	☒	☒
Stack Trace	Rich Text Area	☒	☒
Save Cancel			

6. **Order Return Item** (Acknowledged, External Item Id, Is Processed, Order Product Summary, Order Summary, Quantity, Reason, ReturnId, Return Item Id, and Return Label fields)

Order Return Item Field-Level Security for profile
System Administrator

[Help for this Page](#) ?

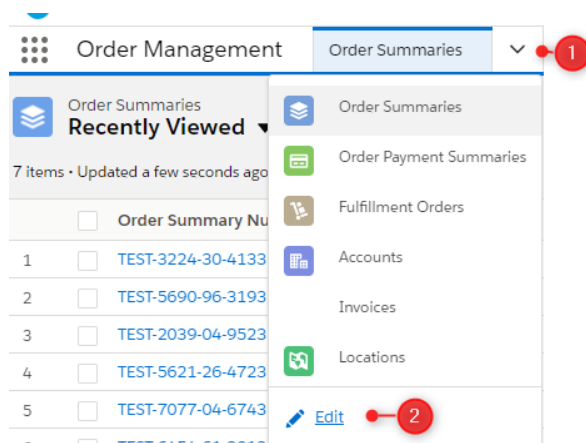
Save Cancel			
Field Name	Field Type	Read Access	Edit Access
Acknowledged	Checkbox	☒	☒
Created By	Lookup	☒	☐
External Item Id	Text	☒	☒
Is Processed	Checkbox	☒	☒
Last Modified By	Lookup	☒	☐
Order Product Summary	Lookup	☒	☒
Order Return Item Id	Text	☒	☒
Order Summary	Lookup	☒	☒
Owner	Lookup	☒	☒
Quantity	Number	☒	☒
Reason	Text	☒	☒
ReturnId	Text	☒	☒
Return Item Id	Text	☒	☒
Return Label	Text	☒	☒
Save Cancel			

5. Order Management App Configuration

5.1. NAVIGATION ITEMS

Once the tabs are on, add them in the app menu.

1. Go to **App Launcher > Order Management**.
2. Edit the menu.



3. Click **Add More Items**.

Edit Order Management App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) ⓘ

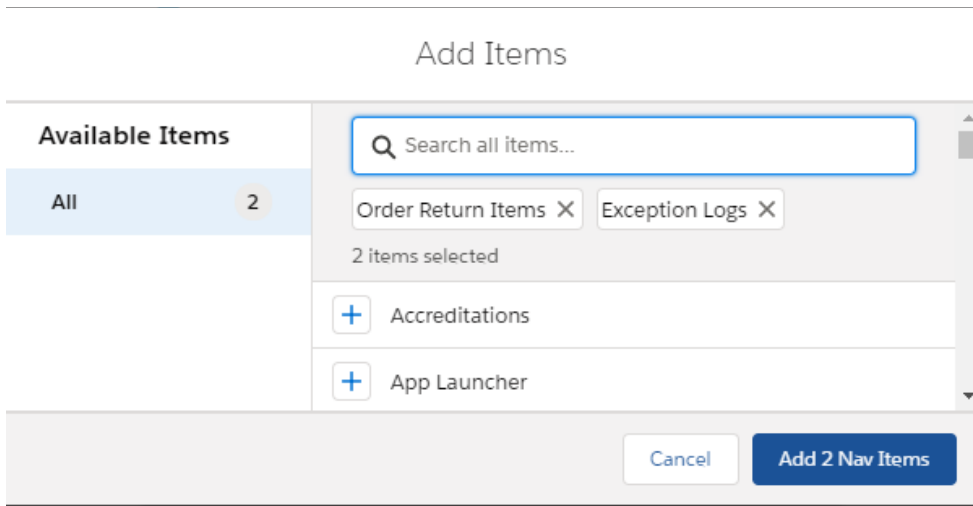
NAVIGATION ITEMS (6) Add More Items

≡		Order Summaries
≡		Order Payment Summaries
≡		Fulfillment Orders
≡		Accounts
≡		Invoices
≡		Locations

Reset Navigation to Default ⓘ

Cancel Save

4. Search for the **Order Return Items** and **Exception Logs** tabs.



5. Click **Add Nav Items**.
6. Click **Save**.

5.2. PAGE LAYOUTS

For Salesforce standard objects, the following custom fields are added:

Object Name	Field Name
Order	Acknowledged
	Is External Order
	Order Source
	Updated Order Merchant Id
Order Product	Currency
	External Id
Order Summary	Is External Order
	Carrier Name
	External Shipment Id
	Fulfillment Order

Shipment	Status
	Tracking Number
	Tracking URL

To add custom fields on the page layout:

1. Go to **Setup Object Manager**.
2. Search for the Object you want the custom field for.
3. Go to **Page Layouts>Edit**.
4. Drag and Drop the custom field to the layout.
5. Click **Save**.

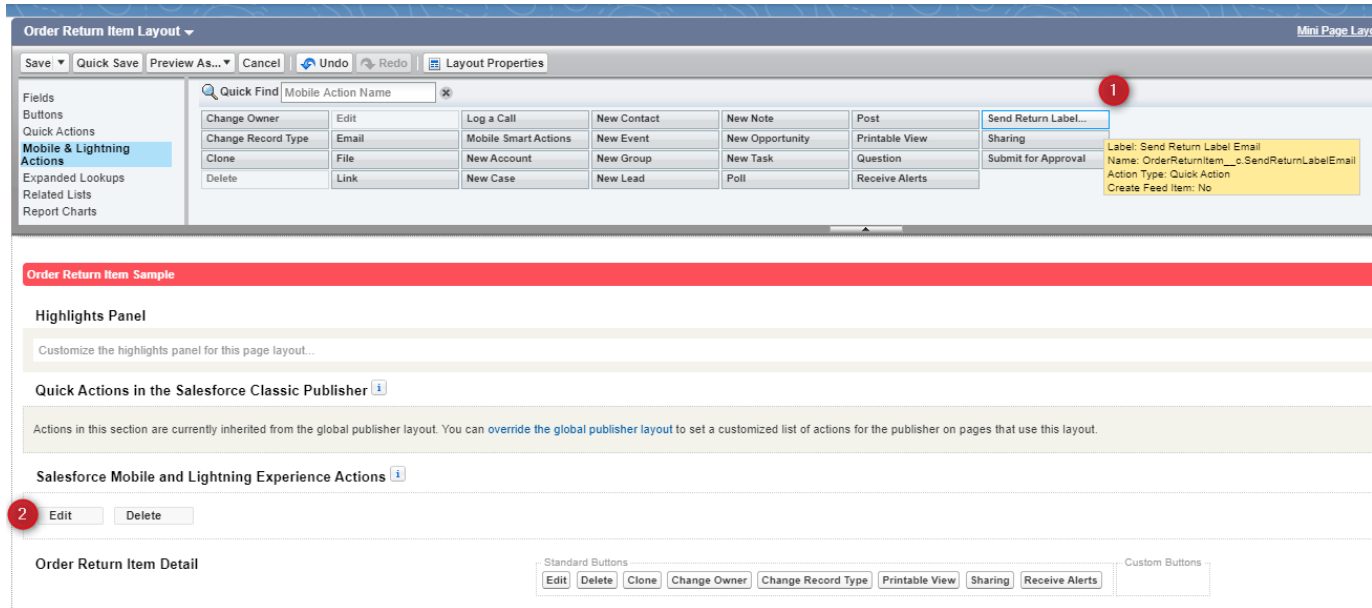
5.3. CUSTOM BUTTONS ON STANDARD OBJECTS PAGE LAYOUTS

Add a **Ship Items** button to the Fulfillment Order page:

1. Go to **Setup>Object Manager>Fulfillment Order**.
2. Select **Page Layouts>Edit** to edit the layout you are using.
3. Select **Mobile & Lightning Actions**.
4. Drag and drop the **Ship Items** button.
5. Click **Save**.

To add a **Send Return Label Email** button to the Order Return Item page:

1. Go to **Setup>Object Manager>Order Return Item**.
2. Select **Page Layouts>Edit** to edit the layout you are using.
3. Select **Mobile & Lightning Actions**.
4. Drag and drop the **Send Return Label Email** button.
5. Click **Save**.



5.4. MAKE SERVICE FLOWS AVAILABLE ON THE ORDER SUMMARY RECORD PAGE

You can easily give users access to your flows by adding them to the **Actions & Recommendations** component on the order summary FlexiPage:

1. From **Setup > User Interface**, select **Actions & Recommendations**.
2. Click **New Deployment**, then click **Next**.
3. After you name the deployment, select **Flows and Quick Actions**, deselect **Recommendations**, and click **Next**.
4. In the **Available Objects** list, find **Order Summary**, move it to the **Selected Objects** list, and click **Next**.
5. Select the **Default** tab.
6. In the **All Actions** list, find your cloned flows, and drag them to the **Top Pinned** section.

Note: We recommend adding the following flows:

- Cancel Items

- Cancel Order
- Return Items
- Reject Items

7. Select your flows using the checkboxes next to their names and click **Unmark Removable**.
8. Click **Next**.
9. On **Select actions to add**, make sure to select only the flows recommended above.
10. Click **Save**.
11. In the Lightning App Builder, edit the **Order Summary** record page.

Note: To edit the default record page, your organization must have an order summary record.

12. Open an order summary record page.
13. From the **Setup** menu, select **Edit Page**.
14. Select the **Actions & Recommendations** component in the preview layout.
15. In the **Activation Actions & Recommendations Deployment** field, select the deployment you created, and click **Save**.
16. In the dialog box, click **Activate**, and then click **Save**.
17. Click **Activation**.
18. Save the page layout as the organization default.

Note: For more information on configuring an Actions & Recommendations component, see the [Lightning Flow for Service Developer Guide](#).

5.5. DISPLAY THE RELATED LIST ORDER RETURN ITEMS ON THE ORDER SUMMARY RECORD PAGE

First, go to **Setup - Object Manager - Order Summary**.

1. Go to **Setup>Object Manager>Order Summary**
2. Go to **Page Layouts>Edit**.
3. Select the **Related List** menu.

4. Drag and drop **Order Return** Items list.

SETUP > OBJECT MANAGER
Order Summary

Details
Fields & Relationships
Page Layouts 1
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Validation Rules

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

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists 2
Report Charts

Quick Find Related List Name

Credit Memos	Order Payment Sum...
Fulfillment Orders	Order Product Sum...
Invoices	Order Return Items
Order Adjustment ...	Shipping Addresses

Related Lists

Fulfillment Orders

Fulfillment Order Number	Total Quantity	Total with Tax	Status	Type	Fulfilled Location
GEN-2004-001234	38,860	\$123.45	Sample Text	Sample Text	Sample Text

Order Product Summaries

Name	Status	Quantity	Unit Price	Line Adjustments	Tax	Line Total
Sample Text	Sample Text	73,509	\$123.45	\$123.45	\$123.45	\$123.45

Order Return Items 3 4

Order Return Item Id	Order Product Summary	Reason	Quantity	Is Processed
Sample Text	Sample Text	Sample Text	22,609	✓

5. Configure which fields to display. We recommend the following fields:

- Order Product Summary
- Reason
- Quantity
- Is Processed

6. Click **Save**.

7. In the **Lightning App Builder**, edit the **Order Summary** record page.

Note: To edit the default record page, your organization must have an order summary record.

8. Open an order summary record page.
9. From the **Setup** menu, select **Edit** Page.
10. Select the **Related List - Single** component in the preview layout.
11. Drag and drop it under the other related lists.
12. Configure it with these values:

- a. **Parent Record:** Use This Order Summary

- b. **Related List:** Order Return Items
- c. **Related List Type:** Enhanced List

13. **Save** and **Activate**.

5.6. ORDER MANAGEMENT SYSTEM'S INTERNAL REASONS

1. Go to **Setup>Object Manager>Order Product Summary Change**.
2. Go to **Fields & Relationships>Reason**.
3. Select **Reason Picklist Values** and add the following values:

Nr.	Reason
1	other
2	customerInitiatedCancel
3	invalidCoupon
4	malformedShippingAddress
5	noInventory
6	priceError
7	shippingPriceError
8	taxError
9	undeliverableShippingAddress
10	unsupportedPoBoxAddress
11	damagedOrUsed
12	missingComponent
13	notEligible
14	outOfReturnWindow
15	customerDiscretionaryReturn
16	customerInitiatedMerchantCancel
17	deliveredTooLate
18	expiredItem

19	productArrivedDamaged
20	productNotAsDescribed
21	qualityNotAsExpected
22	wrongProductShipped

5.7. ORDER MANAGEMENT SYSTEM'S ORDER SUMMARY STATUS

1. Go to **Setup>Object Manager>Order Summary**.
2. Next, go to **Fields & Relationships>Status**.
3. Check if the following values exist in **Status Picklist Values**.

Nr	Status	Active
1	Created	Yes
2	Approved	Yes
3	Waiting to Fulfill	Yes
4	Fulfilled	Yes
5	Canceled	No

Status Picklist Values				
New Reorder Replace Printable View Chart Colors				
Action	Values	API Name	Default	Chart Colors
Edit Deactivate	Created	Created	☒	Assigned dynamically
Edit Del Deactivate	Approved	Approved	☐	Assigned dynamically
Edit Del Deactivate	Waiting to Fulfill	Waiting to Fulfill	☐	Assigned dynamically
Edit Del Deactivate	Fulfilled	Fulfilled	☐	Assigned dynamically

Inactive Values		
Action	Values	API Name
Del Activate	Canceled	Canceled

5.8. SCHEDULE GOOGLE ORDERS INGESTION INTO THE ORDER MANAGEMENT SYSTEM

Decide how often Google orders are ingested into the order management system. Use the options below to schedule the job to run daily (from Salesforce Setup), or to run once at 15 minutes (using custom code).

To schedule the Google fetch orders job:

1. Go to **Setup>Custom Code>Apex Classes**.
2. Click on **Schedule Apex**.
3. Specify the name of the class that you want to schedule, in this case: *GoogleFetchOrders*.
4. Specify how often the Apex class should run.
 - a. For **Weekly**—specify one or more days when the job should run (such as Monday and Wednesday).
 - b. For **Monthly**—specify either the date or the day (such as the second Saturday of every month) when the job should run.
5. Specify the start and end dates for the Apex scheduled class. If you specify a single day, the job only runs once.
6. Specify a preferred start time. The exact time the job starts depends on service availability.
7. Click **Save**.

Apex Classes ~ Salesforce - Developer Edition - Goo...

osfdigital37-dev-ed.my.salesforce.com/_ui/common/data/Look...

Lookup

Search... Go!

You can use "*" as a wildcard next to other characters to improve your search results.

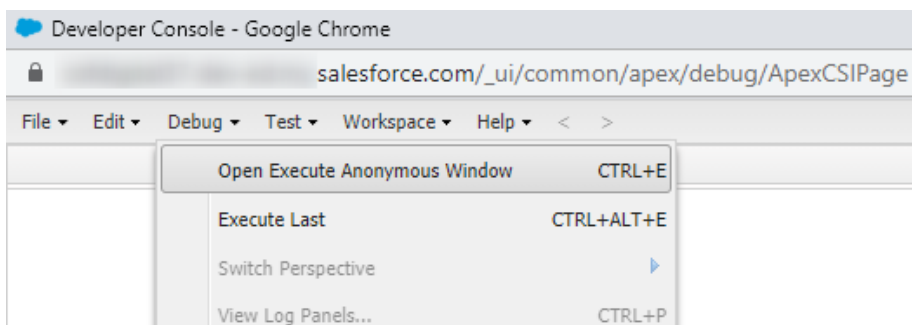
Recently Viewed Apex Classes

Name	Namespace Prefix	Api Version
GoogleFetchOrders	OsfOmsGoogle	49
GoogleFetchReturns	OsfOmsGoogle	49

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Note: We recommend scheduling the job that ingests Google orders into the order management system to run every 15 minutes. To schedule it as recommended:

1. Click the Quick Access menu (⚙️).
2. Click **Developer Console**.



3. Expand the **Test** menu.
4. Select the **Open Execute Anonymous Window**.

5. Copy and paste the code below.

```
//To schedule job every 15 minutes

Integer everyNthMinute = 15;

String nameOfSchedulableClass = 'Osf0msGoogle.GoogleFetchOrders';

Integer counter = 1;

for (Integer minute = 0; minute < 60; minute++) {

    if (Math.mod(minute, everyNthMinute) == 0) {

        String scheduleName = nameOfSchedulableClass + String.valueOf(counter);

        String cronPattern = '0 ' + String.valueOf(minute) + ' * * * ?';

        System.schedule(scheduleName, cronPattern, (Schedulable)Type.forName(nameOfSchedulableClass).newInstance());

        counter++;

    }

}
```

6. Click **Execute**.
7. To check the scheduled jobs, go to **Setup>Environments>Jobs>Scheduled Jobs**.


SETUP
Scheduled Jobs

All Scheduled Jobs Help for this Page ?

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	OsfOmsGoogle.GoogleFetchOrders1	Levinta_Ana	12/18/2020, 2:05 PM		12/18/2020, 3:00 PM	Scheduled Apex
Del	OsfOmsGoogle.GoogleFetchOrders2	Levinta_Ana	12/18/2020, 2:05 PM		12/18/2020, 2:15 PM	Scheduled Apex
Del	OsfOmsGoogle.GoogleFetchOrders3	Levinta_Ana	12/18/2020, 2:05 PM		12/18/2020, 2:30 PM	Scheduled Apex
Del	OsfOmsGoogle.GoogleFetchOrders4	Levinta_Ana	12/18/2020, 2:05 PM		12/18/2020, 2:45 PM	Scheduled Apex

5.9. SCHEDULE GOOGLE ORDER RETURNS INGESTION INTO THE ORDER MANAGEMENT SYSTEM

Decide how often Google orders returns are ingested into the order management system. Use the options below to schedule the job to run daily (from Salesforce Setup), or to run once at 15 minutes (using custom code)

To schedule the Google fetch returns job:

- Go to **Setup > Custom Code > Apex Classes**.
- Click on **Schedule Apex** button.
- Specify the name of the class that you want to schedule, in this case: *GoogleFetchReturns*.
- Specify how often the Apex class should run.
 - For **Weekly**—specify one or more days when the job should run (such as Monday and Wednesday).
 - For **Monthly**—specify either the date or the day (such as the second Saturday of every month) when the job should run.

5. Specify the start and end dates for the Apex scheduled class. If you specify a single day, the job only runs once.
6. Specify a preferred start time. The exact time the job starts depends on service availability.
7. Click **Save**.

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly o

Save Cancel

Job Name

Apex Class

Schedule Apex Execution

Frequency
☒ Weekly
☐ Monthly

Recurs every week on

☒ Sunday
☒ Monday
☒ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☒ Saturday

Start [12/18/2020]

End [12/18/2020]

Preferred Start Time

Exact start time will depend on job queue activity.

Save Cancel

Lookup

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Apex Classes

Name	Namespace Prefix	Api Version
GoogleFetchOrders	OsfOmsGoogle	49
GoogleFetchReturns	OsfOmsGoogle	49

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Note: We recommend scheduling the job that ingests Google order returns into the order management system to run every 15 minutes. To schedule it as recommended:

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2. Click **Developer Console**.
3. Expand the **Test** menu.
4. Select the **Open Execute Anonymous Window**.

5. Copy and paste the code below.

```
//To schedule job every 15 minutes

Integer everyNthMinute = 15;

String nameOfSchedulableClass = 'Osf0msGoogle.GoogleFetchReturns';

Integer counter = 1;

for (Integer minute = 0; minute < 60; minute++) {

    if (Math.mod(minute, everyNthMinute) == 0) {

        String scheduleName = nameOfSchedulableClass + String.valueOf(counter);

        String cronPattern = '0 ' + String.valueOf(minute) + ' * * * ?';

        System.schedule(scheduleName, cronPattern, (Schedulable)Type.forName(nameOfSchedulableClass).newInstance());

        counter++;

    }

}
```

6. Click **Execute**.
7. To check the scheduled jobs, go to **Setup>Environments>Jobs>Scheduled Jobs**.

6. Contact

If you have any questions, please contact us at contact@osf.digital.