



**Passionate about
eCommerce**

Salesforce Commerce Cloud (B2B) and Dynamics 365 Business Central Integration Admin Guide

i95Dev -Trusted Global Ecommerce Partner

Take your eCommerce business to the next level.

About i95Dev

i95Dev is a full-service eCommerce company that accelerates customer's Digital Transformation by providing products, solutions and services that ensure fast and secure deployments that is designed for flexibility and agility in a rapidly changing business world

We specialize in designing, developing, and maintaining B2B/ B2C integrated omni-channel eCommerce solutions.

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1 Overview

This document will guide the salesforce admin or developer to configure all the required attributes in order to enable sync. There are certain attributes like remote site settings, custom meta records, custom settings, and lightning components. Configuration should be done in the sequential order in which they are mentioned in the document.

2 Remote Site Setting Configurations

First, you need to configure the remote site setting in the salesforce org for the base i95 Cloud API URL. You can navigate using the below-mentioned steps:

1. From Setup, in the Quick Find box, enter **Remote Site Settings**. Select Remote Site Settings.
2. Click, **New Remote Site**.
3. Enter a name in the Remote Site Name field.
4. Enter the base URL of the i95 Dev Cloud API (<https://clouduat2api.i95-dev.com>) in the Remote Site URL field.
5. Check the **Active** checkbox.
6. Click on the **Save** button to save these details.

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.



The screenshot shows the 'Remote Site Edit' form in Salesforce. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The form contains the following fields:

- Remote Site Name:** A text field with the value 'i95CloudAPI'.
- Remote Site URL:** A text field with the value 'https://clouduat2api.i95-dev.com'.
- Disable Protocol Security:** A checkbox that is unchecked, with a help icon to its right.
- Description:** A large text area that is currently empty.
- Active:** A checkbox that is checked, indicated by a blue checkmark.

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

3 Custom Settings Configurations

To control the functionality of the Jobs or to initiate the batches:

1. From Setup, in the Quick Find box, enter **Custom Settings**. Select Custom Settings.
2. Click, **Manage Records** of the Setup Settings.
3. Click **New** (The New button on the top center).
4. A form will be shown.
5. Fill the Encryption Key and Encryption Password in their respective fields.

u
nt **RecordTypeId**. Fill the RecordType Id from Account's Record Type.

- For RecordType Id: Go to Object Manager > Select Account > Record Type > Select the record type for B2b Account > From URL get the RecordType Id.
- Example: URL – <https://.../RecordTypes/0125g000000BrqR/view> – Copy the Id and paste it over the custom settings.

4 Apex Setting Configuration

Follow this step if you are installing the unreleased version (beta) of the managed package.

- From Setup, in the Quick Find box, enter **Apex Settings**. Select **Apex Settings**.
- Check the checkbox in front of 'Deploy Metadata from Non-Certified Package Versions via Apex.' Click **Save**.

5 Custom Meta Data Type Configuration

- From **Setup**, in the Quick Find box, enter Custom Metadata Types > Select Custom Metadata Types.
- Click, **Manage Records** of the i95 Dev Cloud meta data.
- Click, **New**.
- Provide input for all the fields then **Save** it. You can take a reference using below table.

Label	I95_Dev_Cloud
-------	---------------

i95 Dev Cloud Name	I95_Dev_Cloud
SubscriptionKey	Given By the i95 Dev Team
ServiceUrl	https://clouduat2api.i95-dev.com/api
AccessToken	Given By the i95 Dev Team
CustomerId	Given By the i95 Dev Team
InstanceType	Staging or Production
EndpointCode	Given By the i95 Dev Team
IsShipmentMapping	True
IsPaymentMapping	True
TargetSystemName	Microsoft Dynamics365 Business Central
Actual Access Token	Salesforce will generate this automatically after enable the Auth process
SchedulerID	Salesforce will generate this automatically after enable the Auth process
Push Customer EndPoint	/Customer/PushData
Push Product EndPoint	/Product/PushData
Customer Pull Response	/Customer/PullResponse
Product Pull Response	/Product/PullResponse
Customer Response Ack	/Customer/PullResponseAck
Product Response Ack	/Product/PullResponseAck
Pull Customer BC	/Customer/PullData
Pull Product BC	/Product/PullData
API Response	Salesforce will generate this automatically after enable the Auth process
Customer Push Response	/Customer/PushResponse
Product Push Response	/Product/PushResponse
SalesOrder Push	/SalesOrder/PushData
SalesOrder PullResponse	/SalesOrder/PullResponse
SalesOrder PullResponseAck	/SalesOrder/PullResponseAck

6 Enable Auth

After configuring the custom meta data record, you need to enable Auth.

1. From App Launcher, in the search box, enter **i95 Dev Cloud**.
2. Select the app *i95 Dev Cloud*.
3. Navigate to the i95 Dev **Setup** tab.
4. In the Authorization section, **Active** the toggle then, click on the **Enable Auth** button.

It will schedule a job for authorization and update the custom meta data records for the actual access token and scheduler id. It is a one-time setup but you can turn off/on the auth process using the toggle.

7 Enable Jobs

The last step in the configuration is to enable jobs for the sync using the same i95 Dev Setup tab mentioned in the Enable Auth section.

You can make the toggle active and select the appropriate frequency for the sync. It is a one-time setup but you can turn off/on the sync process using the toggle.

The screenshot shows the 'i95 Dev Connector Setup' interface. At the top, there's a navigation bar with 'i94 Dev Cloud', 'i95 Dev Setup' (selected), and 'Reports'. A search bar is also present. The main content area is divided into sections for 'Authorization', 'Customer', 'Product', and 'Order'. Each section has a toggle switch for 'Active' status and a frequency dropdown menu set to 'Every 15 mins'. An 'Enable Job' button is next to each frequency dropdown. The 'Authorization' section also has an 'Enable Auth' button.

Section	Direction	Status	Frequency	Action
Authorization	SFCC To i95 Dev	Active	Every 15 mins	Enable Job
	i95 Dev To SFCC	Active	Every 15 mins	Enable Job
Customer	SFCC To i95 Dev	Active	Every 15 mins	Enable Job
	i95 Dev To SFCC	Active	Every 15 mins	Enable Job
Product	SFCC To i95 Dev	Active	Every 15 mins	Enable Job
	i95 Dev To SFCC	Active	Every 15 mins	Enable Job
Order	SFCC To i95 Dev	Active	Every 15 mins	Enable Job

8 Page Layout Configurations

We have added some custom fields to the Object. To view that fields on the form we have to add it from Page layout. For adding the fields to the layout:

1. Select the Object from the **Object Manager**.
2. Click on the **Page Layouts** sections.
3. Drag the required fields from **Fields** that is to shown on the form to the **Detail section**.



SETUP > OBJECT MANAGER

Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

Order Layout

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

Quick Find

Field Name

Section

Activated By

Billing Phone Number

Contract End Date

Customer Authoriz...

Last Modified By

Ordered Date

Order Number

Order Status

PO Number

Sales Channel

Status

Blank Space

Activated Date

Bill To Contact

Contract Name

Customer Authoriz...

Message ID

Order End Date

Order Owner

Order Type

Price Book

Sales Store

Target ID

Account Name

Billing Address

Company Authoriz...

Contract Number

Description

Opportunity

Order Management ...

Order Reference N...

Original Order

Reduction Order

Shipping Address

Tax Locals

Account Number

Billing Email Add...

Company Authoriz...

Created By

ISB API Response

Order Amount

Order Name

Order Start Date

PO Date

Related Order

Ship To Contact

Total Adjust...

Order Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Order Detail

Standard Buttons

Change Record Type Edit Delete Clone Change Owner Sharing Activate Activate Deactivate Printable View

Custom Buttons

Order Information (Header visible on edit only)

Order Owner Sample Text

Order Number GEN-2004-001234

Contract Number Sample Text

Order Amount \$123.45

Account Name Sample Text

Order Type Sample Text



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